



Cisco Unified Intelligence Center User Guide, Release 12.0(1)

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Change History

| Change | See | Date |
|---|---|---------------|
| Added Edge Chromium details and self-signed certificates | Browser Support and Self-Signed certificates | December 2020 |
| Initial Release of Document for Release 12.0 | | January 2019 |
| Changed topic Dashboard Actions under chapter Dashboards | Dashboard Actions | |
| Changed topics under chapter Schedule Report | Schedule Report | |
| Changed topics under chapter Reports | Reports | |
| Changed topic Get Help on Cisco Unified Intelligence Center under chapter View Help | Get Help on Cisco Unified Intelligence Center | |

About This Guide

This guide explains the following functionality of the Cisco Unified Intelligence Center reporting application.

- Dashboards
- Reports
- Permalinks
- Schedule Reports
- View Help
- Gadget Toolbar
- Live Data Failover

Audience

This guide is intended for Cisco Unified Intelligence Center users to manage dashboards, manage reports, filter report data, run reports, schedule a report, retrieve permalinks and more.

Related Documents

- Cisco Unified Intelligence Center Guides at <https://www.cisco.com/c/en/us/support/customer-collaboration/unified-intelligence-center/tsd-products-support-series-home.html>
- Cisco Unified Intelligence Center Developers' Forum at <https://developer.cisco.com/site/reporting/overview/>

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CHAPTER 1

Introduction to Cisco Unified Intelligence Center

- [Overview, on page 1](#)
- [Access Unified Intelligence Center, on page 2](#)
- [Default Locale in Unified Intelligence Center, on page 2](#)
- [Synchronize Cluster, on page 3](#)
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Overview

Cisco Unified Intelligence Center is a reporting platform for users of Cisco Contact Center products. It is a web-based application that provides Historical, Real-time, and Live Data reporting and dashboards.

Unified Intelligence Center serves the following primary purposes:

- Obtains data from the base solution's database. The base solution can be any of the Contact Center products.
- Allows you to create custom queries to obtain specific data.
- Customizes the visual presentation of the reports.
- Customizes the report data.
- Allows different groups of people to view specific data based on their roles.

Unified Intelligence Center users can use the new interface to perform the following tasks:

- Create and view Reports.
- Schedule reports to run at selected intervals.
- Import and export reports and report folders.

Customer Journey Analyzer

Unified Intelligence Center users can use the reporting platform to launch Customer Journey Analyzer using **Analyzer** from the left navigation pane.

You can customize the default Analyzer URL using the CLI `set cuic analyzer url <urlname>`.

For more information on the CLI, see *Cisco Unified Intelligence Center Administration Guide* at <https://www.cisco.com/c/en/us/support/customer-collaboration/unified-intelligence-center/products-maintenance-guides-list.html>.

The Customer Journey Analyzer mines historical data from multiple data sources and systems to generate specific business views of data. The Analyzer visually displays trends to help you identify patterns and gain insight for continuous improvement.



Note You must have completed the on boarding process for Cloud Connect to access Customer Journey Analyzer. Cloud Connect allows Cisco Contact Center on premises customers to connect to cloud services, such as Customer Journey Analyzer to use Business Metrics.

Access Unified Intelligence Center

The URLs for logging in to the Unified Intelligence Center reporting application are:

HTTPS

`https://<HOST>:8444/cuicui/Main.jsp`

Where HOST is the DNS name of a Unified Intelligence Center node.

By default, Unified Intelligence Center does not support HTTP. From the command-line interface, you can set the cuic properties `> http-enabled to on` to enable HTTP. With HTTP enabled, Unified Intelligence Center loads the login page with HTTPS. After successful login, Unified Intelligence Center loads the main page with HTTP.

HTTP

`http://<HOST>:8081/cuicui/Main.jsp`

Where, HOST is the DNS name of a Unified Intelligence Center node.

When `http-enabled` is *off*, Unified Intelligence Center redirects all HTTP requests to HTTPS.



Note Permalinks work in both HTTP and HTTPS.

Default Locale in Unified Intelligence Center



Note To specify a locale, install the language pack.

First time access to Cisco Unified Intelligence Center displays the sign in page in the browser locale. To change the locale, click the username on the top-right corner of your screen and select the required locale from the drop-down list.

When you select a locale, the browser retains the locale information even after you sign out and sign in back to Cisco Unified Intelligence Center within the same browser.

Table 1: Supported Languages

| | | | | |
|----------------------|----------------------|-----------------------|---------------------|-------------------------|
| Brazilian Portuguese | Chinese (Simplified) | Chinese (Traditional) | Danish | Dutch |
| English (U.S.) | French (France) | German | Italian | Japanese |
| Korean | Russian | Spanish (Spain) | Swedish | Polish |
| Turkish | Finnish | Norwegian | Čeština (Czech) | Bulgarian |
| Català (Catalan) | Hrvatski (Croatian) | Magyar (Hungarian) | Slovenčina (Slovak) | Slovenščina (Slovenian) |
| Српски (Serbian) | Română (Romanian) | | | |

Synchronize Cluster

System Configuration Administrator can use the Synchronize Cluster feature (link below the username on the top-right corner of your user interface screen) to notify all nodes in the cluster to clear their local cache. This action synchronizes and empties all caches in the cluster. Clearing the locale cache forces each node to go directly to the database for the requested information.

Each node gets fresh data from the database. The data is automatically put into the local cache and accessed during future requests. Data remains consistent in the database and hence there is no loss of information.

For more information, see *Unified Intelligence Center Cache* section in the *Administration Console User Guide for Cisco Unified Intelligence Center* at

<https://www.cisco.com/c/en/us/support/customer-collaboration/unified-intelligence-center/products-maintenance-guides-list.html>.

Browser Support and Self-Signed Certificates

Unified Intelligence Center supports:

- Internet Explorer 11 (Native mode with Windows 10)
- Firefox ESR 52 and higher ESRs
- Edge Chromium (Microsoft Edge V79 and later)
- Chrome 60 and higher



Note To access OAMP, Internet Explorer 11 compatibility mode is required. Chrome support is only for the new user interface.

Self-Signed Certificates

Ensure that the pop-ups are enabled for Cisco Unified Intelligence Center.

After you enter the Cisco Unified Intelligence Center URL in your browser, the procedure to add a certificate is as follows:

Install certificates on Windows operating system:

The procedure to add a certificate varies for each browser. The procedure for each browser is as follows:

Internet Explorer



Note If you are using a Windows client, signed in as a Windows user, you must run Internet Explorer as an administrator to install the security certificates. In your Start menu, right-click Internet Explorer and select Run as administrator.

Contact your administrator if you do not have the required permissions to install the security certificates.

1. A page appears with the warning that there is a problem with the website's security certificate. Click **Continue to this website (not recommended)** link to open the Cisco Unified Intelligence Center sign in page. The sign in screen appears with a certificate error in the address bar.
2. Click on the certificate error that appears in the address bar and then click **View Certificates**.
3. In the **Certificate** dialog box, click **Install Certificate** to open the **Certificate Import Wizard**.
4. On the **Certificate Import Wizard**, click **Next**.
5. Select **Place all certificates in the following store** and click **Browse**.
6. Select **Trusted Root Certification Authorities** and click **OK**.
7. Click **Next** and then click **Finish**. A **Security Warning** dialog box appears.
8. Click **Yes** to install the certificate. The **Certificate Import** dialog box appears.
9. Click **OK** and close the **Certificate Import** dialog box.
10. Enter your credentials and click **Sign In**.



Note To remove the certificate error from the desktop, you must close and reopen your browser.

Firefox

1. A page appears with the warning that states this connection is untrusted.
2. On the browser tab, click **I Understand the Risks > Add Exception**.
3. On the **Add Exception** dialog box, ensure that **Permanently store this exception** box is checked.
4. Click **Confirm Security Exception**.
The warning page closes automatically.
5. Enter your credentials and click **Sign In**.

Repeat the preceding steps for all the certificate links. After you accept all the certificates, the sign-in process is complete.

Chrome and Edge Chromium (Microsoft Edge)

1. A page appears with the warning that states that there is a problem with your website's security certificate.
In Chrome, click **Advanced > Proceed to <Hostname> (unsafe)**.
In Microsoft Edge, click **Advanced > Continue to <Hostname> (unsafe)**.
The sign in page opens and a certificate error appears in the address bar of your browser.
2. Click on the **Certificate Error**, and then,
In Chrome, click **Certificate (Invalid)**.
In Microsoft Edge, click **Certificate (not valid)**.
The **Certificate** dialog box appears.
3. In the **Details** tab, click **Copy to File**.
The **Certificate Export Wizard** dialog box appears.
4. Click **Next**.
5. Keep the default selection **DER encoded binary X.509 (.CER)** and click **Next**.
6. Click **Browse** and select the folder in which you want to save the certificate.
7. Enter a recognizable **File name** and click **Save**.
8. Click **Next**.
9. Click **Finish**.
A successful export message appears.
10. Click **OK** and close the **Certificate Export Wizard**.
11. Browse to the folder where you have saved the certificate file (.cer file), right click on the file, and click **Install Certificate**.
The **Certificate Import Wizard** dialog box appears.
12. Keep the default selection **Current User** and click **Next**.
13. Select **Place all certificates in the following store** and click **Browse**.
The **Select Certificate Store** dialog box appears.
14. Select **Trusted Root Certification Authorities** and click **OK**.
15. Click **Next**.
16. Click **Finish**.
A **Security Warning** dialog box appears asking if you want to install the certificate.
17. Click **Yes**. A **Certificate Import** dialog box states that the import was successful appears.
18. Click **OK**.
19. Enter your credentials and click **Sign In**.

Close the browser and sign in to Cisco Unified Intelligence Center. The security error does not appear in the address bar.

Install certificates on macOS:

The procedure to download a certificate varies for each browser. The procedure for each browser is as follows:

Chrome and Edge Chromium (Microsoft Edge)

1. A warning page appears which states that your connection is not private. To open the Cisco Unified Intelligence Center sign in page,
 - In Chrome, click **Advanced** > **Proceed to <Hostname> (unsafe)**.
 - In Microsoft Edge, click **Advanced** > **Continue to <Hostname> (unsafe)**.
2. Click on the certificate error that appears in the address bar and then,
 - In Chrome, select **Certificate (Invalid)**.
 - In Microsoft Edge, select **Certificate (Not Valid)**.

A certificate dialog box appears with the certificate details.
3. Drag the **Certificate** icon to the desktop.
4. Double-click the certificate. The **Keychain Access** application opens.
5. In the right pane of Keychains dialog, browse to the certificate, right-click on the certificate, and select **Get Info** from the options that are listed. A dialog appears with more information about the certificate.
6. Expand **Trust**. From the **When using this certificate** drop-down, select **Always Trust**.
7. Close the dialog box that has more information about the certificate. A confirmation dialog box appears.
8. Authenticate the modification of Keychains by providing a password.
9. The certificate is now trusted, and the certificate error does not appear on the address bar.

Firefox

1. In your Firefox browser, enter the Cisco Unified Intelligence Center URL. A warning page appears which states that there is a security risk.
2. Click **Advanced** and then click **View Certificate** link. The **Certificate Viewer** dialog box appears.
3. Click **Details** and then click **Export**. Save the certificate (.crt file) in a local folder.



Note If .crt file option is not available, select .der option to save the certificate.

4. From the menu, select **Firefox** > **Preferences**. The **Preferences** page is displayed.
5. In the left pane, select **Privacy & Security**.
6. Scroll to the **Certificates** section and click **View Certificates ...**. The **Certificate Manager** window is displayed.
7. Click **Import** and select the certificate.

8. The certificate is now authorized, and the certificate error does not appear on the address bar.

Screen Resolution Support

Supported screen resolution for Cisco Unified Intelligence Center: 1366 x 768 or higher.



CHAPTER 2

Dashboards

- [Overview, on page 9](#)
- [Dashboard Actions, on page 11](#)
- [Add Widgets to Dashboard, on page 13](#)
- [Run a Report from the Dashboard, on page 15](#)

Overview

In Cisco Unified Intelligence Center, Dashboard is an interface that allows you to add reports, web pages (URLs), web widgets, and notes in a consolidated view.

All actions on the Dashboards interface are based on your role and on the user permissions for Dashboards and for Folders.

Access Dashboards

From the left navigation pane, click **Dashboards** to access the list of all the available Dashboards. This list includes the dashboards that you have created and the dashboards created by other users on which you have View permissions.



Note

- You must be assigned with the **Dashboard Designer** role to create Dashboards.
 - To view Dashboards created by other users, you must have **View** permissions for the dashboard and its parent folder.
 - Cisco Unified Intelligence Center does not provide a default Dashboard.
-

Run Dashboards

To run a Dashboard, click the Dashboard name. When the Dashboard is in the run mode, use the toolbar to:

- Edit the Dashboard.
- Refresh the Dashboard data.
- Maximize the Dashboard view.

Press **Esc** to restore the original view.

Before You Upgrade

Cisco Unified Intelligence Center 12.0 supports a maximum of ten widgets per Dashboard. Hence, for Dashboards with more than ten widgets in versions before 12.0, ensure to split those Dashboards with a maximum of ten widgets each before upgrade.

Consider a Dashboard with 15 widgets in Unified Intelligence Center versions before 12.0. Before upgrading to version 12.0, use the **Save As** feature to clone the Dashboard and manage the widgets up to ten per Dashboard.

Unsupported Widgets

The Cisco Unified Intelligence Center 12.0 interface for Dashboards does not support the following widgets:

- Schedule Report widgets
- URL widgets containing Dashboard permalinks (Nested Dashboards)

Migration Limitations

The following widgets if added to the Dashboard before Cisco Unified Intelligence Center 12.0 are not migrated.

- Schedule Report widgets.
- URL widgets containing Dashboard permalinks (Nested Dashboards).
- Widgets that were placed beyond the new Dashboard canvas size.



Note Post upgrade to Cisco Unified Intelligence Center 12.0, the positions of the widgets placed in the legacy dashboard interface are retained. However, in few cases the position and size of the widgets are modified to fit inside the new dashboard interface.

- Inaccurate widgets (inaccurate database records)

Example: Report widgets with missing Report Views.



Note For the Schedule Report widgets and Nested Dashboard widgets that are not migrated, the Cisco Unified Intelligence Center server logs do not capture the logs.

For all other widgets, Cisco Unified Intelligence Center server logs captures the log information with the corresponding Dashboard and widget name.

Dashboard Actions

The following table lists various actions that you can perform from the Dashboard.



Note You can open a maximum of ten tabs at a time.

Table 2: Dashboard Actions

| Action | Description |
|--------------------------------|---|
| Dashboard-level actions | |
| New | |
| Dashboard | <p>Creates a new Dashboard.</p> <p>The New Dashboard wizard allows you to:</p> <ul style="list-style-type: none"> • Provide Dashboard properties; Name and Description. • Add widgets to the Dashboard. <p>For more information, see <i>Add Widgets to Dashboard</i>.</p> |
| Folder | <p>Creates a new Folder. Use this feature to categorize Dashboards.</p> <p>Note When you move or save the folders to a different location, the drop-down lists all the folders. You can only navigate into the folders on which you have the Edit permission.</p> |
| Toolbar actions | |
| Refresh | Refreshes the Dashboards page. |
| Favorites | <p>To easily access your Dashboards, you can tag Dashboards as Favorites.</p> <p>Click the star icon beside the Dashboard name to add to Favorites.</p> |
| Search | Searches for a particular Dashboard. |
| Ellipsis (...) actions | |
| Edit | <p>Edits the Dashboard details. In the edit mode, you can:</p> <ul style="list-style-type: none"> • Add, remove, and modify widgets. • Click the icon next to the Dashboard name to edit the Dashboard properties; name and description. <p>After editing the Dashboard, click Save.</p> |

| Action | Description |
|-------------|--|
| Save As | Saves a copy of the Dashboard. |
| Rename | Renames a Dashboard or a Folder. |
| Move | <p>Moves Dashboard or Folder from one folder to another.</p> <p>Note You can move a Dashboard or a Folder only if you have Edit permission on the parent folder of the Dashboard or Folder being moved.</p> |
| Delete | <p>Deletes a Dashboard or a Folder.</p> <p>Note You can delete a Dashboard or a Folder only if you have Edit permission on the parent folder of the Dashboard or Folder being deleted.</p> |
| Permissions | <p>Assigns appropriate permissions to access and manage the Dashboard.</p> <p>Groups—Grants View and Edit permissions for the Dashboard to various groups.</p> <ul style="list-style-type: none"> • Security Administrators can grant these permissions to various groups. • Entity owners can grant these permissions to groups that they are directly associated with. <p>Users—Grants View and Edit permissions for the Dashboard to various users. Applicable only to Security Administrators.</p> <p>Note</p> <ul style="list-style-type: none"> • Higher permissions (View and Edit) from either an individual user or the user group takes precedence. • Only the first 200 records (alphabetical order) are displayed in the Members or Groups panel. To view more records, see Configure > Groups. • When you modify a permission and want to switch between Groups and Users tabs, you will be prompted to either save or discard the changes. |

| Action | Description |
|------------|---|
| Permalinks | <p>Displays the Dashboard permalink.</p> <p>Note You can access permanent hyperlink only from a web browser. You cannot access it from an application such as Microsoft Excel to pull data or display a Dashboard.</p> <p>For more information, see Permalink for a Dashboard.</p> |

Related Topics

- [Add Widgets to Dashboard](#), on page 13
- [Permalink for a Dashboard](#), on page 49

Add Widgets to Dashboard

You can add Reports, Web pages, Notes, and Custom Widgets to a Dashboard. In addition, you can resize and reposition the widgets to suit your needs. The default widget size depends on the available space on the Dashboard canvas.



Note You can add a maximum of ten widgets per Dashboard.

To add widgets to the Dashboard, perform the following steps:

Procedure

- Step 1** From the left navigation pane, click **Dashboards**.
- Step 2** In the **Dashboards** tab,
 - To add widgets to a new Dashboard, click **New > Dashboard**.
 - To add widgets to an existing Dashboard, click the ellipsis icon beside the required Dashboard and click **Edit**.
- Step 3** On the Dashboard canvas, click on the plus icon.
- Step 4** In the **Add Widgets** dialog box, add the required widgets:

| Widget Type | Steps |
|-------------|---|
| Report View | <p>Displays an existing report on the Dashboard.</p> <ol style="list-style-type: none"> a. Click the Report View icon. b. In the Add Report View dialog box, select the Report and the Views from the corresponding drop-down list. c. Click Done. <p>Note</p> <ul style="list-style-type: none"> • For a Report widget, you can click the icons on the widget header to view the existing filter information, manage filters, and play or pause the running of report. • The Manage filters and the View filter information icons appear only when you hover on the report widget. • For Grid view reports, you can increase or decrease the font size of the report data. The default font size is set to 10. Post upgrade to Cisco Unified Intelligence Center 12.0 or later, this setting overrides the font size set during the grid view creation. • In the edit mode, from the Report widget header, use the ellipsis icon to access Filter and modify the filter criteria. • Drilldown reports are not supported. |
| Note | <p>Adds notes to the Dashboard.</p> <ol style="list-style-type: none"> a. Click the Note icon. b. In the Add a Note dialog box, enter Note Title and Note Body. c. Click Done. |

| Widget Type | Steps |
|---------------|---|
| Web page | <p>Displays a web page on the Dashboard.</p> <ol style="list-style-type: none"> a. Click the Web page icon. b. In the Add a Web page dialog box, enter Web URL, the address of the web page that you want to display on the Dashboard. c. Click Done. <p>Limitations for web page widget:</p> <ul style="list-style-type: none"> • The websites enabled with "X-Frame-Options", will not be displayed on the Dashboard. • The web URLs provided without prefixing a protocol (HTTP or HTTPS) will by default use the protocol of the Cisco Unified Intelligence Center application. • When Cisco Unified Intelligence Center is in HTTPS mode, you cannot configure HTTP based widget URLs in Dashboard. • You cannot add Dashboard permalink as web page widget. <p>For information on viewing report permalinks in Dashboards as web page widgets, see <i>View Report Permalinks in Dashboards</i>.</p> |
| Custom Widget | <p>Adds custom widgets to the Dashboard.</p> <ol style="list-style-type: none"> a. Click the Custom Widget icon. b. In the Add Custom Widget dialog box, enter Widget Title and Code Snippet. <p>Note In the Code Snippet box, you can enter any markup/code snippet of the widget that you want to show on the Dashboard. For example, HTML, XML RSS feed, JavaScript, and so on.</p> <p>Maximum Limit: 1000 characters.</p> <ol style="list-style-type: none"> c. Click Done. The embedded code appears on the Dashboard. |

Step 5 Click **Save**.

Related Topics

[View Dashboard Permalink](#)

Run a Report from the Dashboard

Running a report from the Dashboard depends on the **Skip filter during the report execution** check box during the report filter selection:

- If this check box is checked for a report, the system bypasses the filter and runs that report using the default filter.
- If this check box is unchecked for a report, for the first access, the system prompts you to choose a **Filter** to run that report.

**Note**

- The **Skip filter during the report execution** check box is not checked for any of the stock reports. If you do not want a Dashboard report to require filter selection upon first use, you must create a new report, set the default filter, and check the **Skip filter during the report execution** check box.
- The **Filter** prompt displays the corresponding icon to denote the type of report view, such as, Grid, Chart, Pie, and so on.
- In both these scenarios, from the ellipsis icon on the Report widget header you can access **Filter** to edit the filter criteria.

Click the **Filter** button to display the filter criteria in the **Filter Data** dialog box based on the following validations:

- Displays the filter criteria screens based on the selected report query type.
- Populates with the default filter criteria if the default filter is set for that report.

Edit Filter Data

You can edit the report filter data from the Dashboard in the following two ways:

- **Run mode**—Click the filter icon on the report widget header.
- **Edit mode**—Click the ellipsis icon and select **Filter** from the available menu options.

Modify the required filter criteria and click **Run**. The report refreshes reflecting the modified filter criteria.

**Note**

When you edit the report filter for a Dashboard during Create, Edit, or Run mode, the filter settings are stored in the browser cache and is specific to the individual user. Hence, the next time you sign in and run the Dashboard, the report widget uses the filter information stored in the browser cache and generates the report (without prompting you to update the filter criteria). The browser cache is retained up to 30 days.

Every time you run the report, the filter data in the browser cache is validated for permissions. If there is a permission mismatch, an error message appears that the filter you selected before is no longer valid and select the filters again.

Also, if any other user sign-in to the same browser, that user cannot view your filter settings.

The filter settings stored in your browser cache are cleared only:

- If you have not used the Dashboard for the last 30 days.
- If you manually clear the cache.

For more information on Report Filters, see *Report Filters*.

Related Topics

[Report Filters](#), on page 24



CHAPTER 3

Reports

- [Overview](#), on page 19
- [Report Actions](#), on page 20
- [Add Template Help](#), on page 23
- [Report Filters](#), on page 24
- [Report Types](#), on page 28
- [Manage Reports](#), on page 31
- [Run Report](#), on page 38
- [Import Reports](#), on page 41
- [Export Reports and Folders](#), on page 42

Overview

Reports show data returned by Report Definitions (database query). The database queries extract this data and can be displayed in various Report Views—as grids and charts.

Users with the Report Designer user role can click the **Reports** from the navigation page to open the Reports page.



Note All actions on the Reports interface are based on user role and on the user's object permissions for reports and for folders.

For more information about creating or editing a report, see *Create Reports*.

Related Topics

[Create Reports](#), on page 31

Stock Reports

Cisco provides stock report templates to use with Unified Intelligence Center. You can download Stock reports from Cisco.com. Stock report templates display data that has been saved in the Unified CCE database.

After installing Unified Intelligence Center, you can import stock templates using the **Import** feature and customize the stock reports to suit your business requirements. You can clone the imported stock templates using the **Save As** option and customize.

Stock reports have one default grid view. Few stock reports also have a chart view.



Note Localization of stock report templates is not supported.

The available stock report templates are:

- **Audit Trail**—view the sequence of audit records of the transactions related to create, update, modify, and delete that are performed on the entities of a Unified Intelligence Center server.

By default, only System Administrators can access and view this report. System Administrator can give permissions to other Unified Intelligence Center users to use this report.

- **Group Access Detail**—view access rights of groups that use Unified Intelligence Center resources such as Dashboards, Reports, and other resources.
- **Resource Ownership and Access**—view access rights of users and about ownership status of users who use Unified Intelligence Center resources such as Dashboards, Reports, and other entities.
- **User's Audit Log**—view the audit log data of users such as, Logged In User Detail (name and role), Event Detail, Updated Column, User Detail, and other modified details.

For more information, click the "?" icon (Template Help) from the report in the run mode.

Report Actions

The following table lists various actions that you can perform from the Reports.



Note You can open a maximum of ten tabs at a time.

Table 3: Report Actions

| Action | Description |
|-----------------------------|--|
| Report-level actions | |
| New | |
| Report | Creates a new report in the selected folder. Note You cannot create reports inside the Stock folder. You can only import reports into the Stock folder. To edit or customize reports, clone the report and edit the cloned version. |
| Folder | Creates a new Folder. Use this feature to categorize reports. Note When you move or save the folders to a different location, the drop-down lists all the folders including the disabled folders. You can navigate to subfolders with Edit permissions. Note You cannot create folders inside the Stock folder. |

| Action | Description |
|------------------------------|--|
| Toolbar actions | |
| Refresh | Refreshes the Reports page. Applies to all folder levels (root, sub folder, and report). |
| Favorites | To easily access your reports, you can tag Reports as your Favorites. Click the star icon beside the Report name to add to Favorites. |
| Search | Searches for a particular the Report. |
| Import | Imports a report. To import a report, you need the Report Designer, Report Definition Designer, and Value List Collection Designer roles and the Edit permission on the target folder where you want to import these reports. For more information, see <i>Import Reports</i> . Note Applies to all folder levels (root, subcategory, and report). |
| Ellipsis(...) actions | |
| Edit | Edits the Report details. In the edit mode, you can add, modify, and delete report details, views and thresholds, and filters. After editing the Report, click Finish . Note You cannot edit a Stock report. |
| Save As | Saves a copy of the report with a different name. Note <ul style="list-style-type: none"> • By default, the reporting users do not have permission to create a subfolder in the Reports root folder. To get permissions, contact your administrator. • You cannot perform the Save As action to move contents (reports or folders) into the Stock folder and its subfolders. Note The report description does not support the following special characters: <ul style="list-style-type: none"> • Parentheses (()) • Angle brackets (<,>) • Forward slash (/) • Question mark (?) • Quotes (") • Any scripts; JavaScript |

| Action | Description |
|--------------------------------|--|
| Clone Report Definition | <p>If you want to create a copy of the Report Definition that is associated with the report being saved:</p> <ol style="list-style-type: none"> 1. Click the Clone Report Definition check box. 2. Enter the new Report Definition Name and select the Report Definition Location. 3. Click Save. <p>The new report gets associated to the cloned Report Definition.</p> |
| Rename | <p>Renames a folder or a report.</p> <p>Note You cannot rename a Stock folder or a Stock report.</p> <p>Note Applies to the root-level folder.</p> |
| Move | <p>Moves Report or Folder from one folder to another.</p> <p>Note</p> <ul style="list-style-type: none"> • You can move a Report or a Folder only if you have Edit permission on the parent folder of the Report or Folder being moved. • You cannot move custom folders or reports from within the Stock folder (and its subfolders) to other locations and the other way. |
| Set Default Filters | <p>Creates report filters.</p> <p>For more information, see <i>Report Filters</i>.</p> <p>Note You can also set the default filter by checking the Set as Default check box in the Choose Filter dialog box during the report run mode.</p> |
| Add Help | <p>Hosts the help page for Report Templates. For more information, see <i>Add Template Help</i>.</p> |
| Delete | <p>Deletes a report or a folder.</p> <p>Note</p> <ul style="list-style-type: none"> • You can delete a Report or a Folder only if you have Edit permission on the parent folder of the Report or Folder being deleted. • Stock folder cannot be deleted. Stock report can be deleted. |

| Action | Description |
|-------------|---|
| Permissions | <p>Assigns appropriate permissions to access and manage the Report.</p> <p>Groups—Grants View and Edit permissions for the Report.</p> <ul style="list-style-type: none"> • Security Administrators can grant these permissions to various groups. • Entity owners can grant these permissions to groups that they are directly associated with. <p>Users—Grants View and Edit permissions for the Report to various users. Applicable only to Security Administrators.</p> <p>Note</p> <ul style="list-style-type: none"> • Higher permissions (View and Edit) from either an individual user or the user group takes precedence. • Only the first 200 records (alphabetical order) are displayed in the Members or Groups panel. To view more records, see Configure > Groups. • When you modify a permission and want to switch between Groups and Users tabs, you will be prompted to either save or discard the changes. |
| Permalinks | <p>Displays the Report permalink. For more information, see <i>Permalink for a Report</i>.</p> <p>Note You can access permanent hyperlink only from a web browser.</p> |
| Export | <p>Export any custom report or report folders. Reports and report folders are exported in a ZIP file format. To export a report or a report folder, you need the REPORT DESIGNER role. For more information, see <i>Export Reports and Folders</i>.</p> |

Related Topics

- [Permalink for a Report](#), on page 50
- [Add Template Help](#), on page 23
- [Create Reports](#)
- [Import Reports](#), on page 41
- [Export Reports and Folders](#), on page 42
- [Report Filters](#), on page 24

Add Template Help

You can configure individual help files to each Cisco Unified Intelligence Center report. You can either host the help page separately and point the report to it or create and upload the help page along with the report.

This help content is specific to the report and can contain explanation on:

- How to use the report
- Field description
- Details of the relationship between the fields

- How to interpret the report data or
- Any other report related information

You can upload only files in ZIP formats. ZIP files can contain multiple HTML files. The HTML page contents support rich text including images.



Note Help files does not support videos and other interactive content.

To configure the help page for a report, perform the following steps:

Procedure

- Step 1** From the left navigation pane, click **Reports**.
- Step 2** Click the Ellipsis icon (...) next to the report row for which you want to create the help page and click **Add Help**.
- Step 3** In the **Add Help** dialog box,
- If you want to set an external help page as the report help, select the **URL** option and enter the external URL location.
 - If you want to upload the help file, select the **Choose file** option and click **Browse** to upload a ZIP file (with HTML files).
- Step 4** After uploading the file, click **Save**.

Note When you run the report, click the "?" icon (Template Help) on the Reports toolbar to view the configured help file.

Related Topics

[Get Help on a Report](#), on page 59

Report Filters

Filter Types

Report filters in Unified Intelligence Center are used to present selective data. You can define the filter to filter the data that you want to display in the report. There are two ways to view the Filter page.

- Before the report is generated: You can set and refine the default filter values using the **Actions > Set Default Filter** option.
- After the report is generated: You can refine the filter values using the filter icon.



Note You cannot view filters if the Report Designer has selected the **Skip filter during the report processing** check box during the report filter selection.

Cisco Unified Intelligence Center supports the following types of report filters:

- Date & Time
- Key Criteria
- Field Filters
- Parameters

Filter parameters are displayed based on the selected query type in the Report Definition for that report.

Table 4: Filter tabs

| Report Definition Query Type | Applicable Filter Tabs |
|----------------------------------|--|
| Database Query | Date & Time, Key Criteria, Field Filters |
| Live Data or Real Time Streaming | Key Criteria, Field Filters |
| Anonymous Block | Parameters |
| Stored Procedure | Parameters |

Date & Time



Note • Cisco Unified Intelligence Center uses the browser locale to display the Date & Time format in the filter page. If Cisco Unified Intelligence Center does not support the browser locale language, then the locale selected in the Cisco Unified Intelligence Center application is used.

To configure Date and Time filters for a report, perform the following steps:

Procedure

- Step 1** After creating the report, click **Set Default Filter** from the ellipsis **Actions**.
- Step 2** In the **Date & Time** filter wizard, select the **Date Range** and **Time Range** options.
 - The options available in the **Date Range** and **Time Range** filter are predefined.
 - Selection of the **Custom** option allows you to customize the **Date Range** and **Time Range** details.
 - You can select the days of the week (Days > Custom) only if the time interval spans more than a day.

For reports that are based on the query type Anonymous Block, you cannot select days of the week. For more information, see *Cisco Unified Intelligence Center Report Customization Guide* at <https://www.cisco.com/c/en/us/support/customer-collaboration/unified-intelligence-center/products-user-guide-list.html>.

Step 3 Check the **Skip filter during the report execution** check box if you want to skip filter selection during the running of report.

Note In the **Choose Filter** dialog box (report run mode), you can check the **Set as Default** check box to set the report filter as the default.

Step 4 Click **Next**.

Key Criteria

Use the **Key Criteria** tab in the filter to select value lists or collections. A collection is a pre-configured group of values.



Note Key Criteria fields are predefined filters and are displayed in the filter screen if they are defined in the Report Definition.

To configure Key Criteria filters, perform the following steps:

Procedure

Step 1 After creating the report, click **Set Default Filter** from the ellipsis **Actions**.

Step 2 In the **Date & Time** filter wizard, select the **Date Range** and **Time Range** options and click **Next**.

Step 3 In the **Key Criteria** filter wizard, select the collections or values from the **Available** selection box.

Note Do not set multiple filter parameters; set any one filter parameter.

Step 4 Use the arrows to move the selected collections or values to the **Selected** selection box.

Step 5 You can also select multiple collections or values.

Step 6 Click **Next**.

Field Filters

Use the **Field Filters** tab to filter any field in the report. Based on the selected field type (date, numeric/decimal, boolean, or string), different operators are available. For example, you can filter calls in queue for greater than two minutes or on all agents in the hold state to filter out the less important information.



Note You can configure Field Filters in reports:

- Only for SQL Query based reports.
- To filter a text, date, boolean, or a decimal field.

To configure Field Filters, perform the following steps:

Procedure

- Step 1** After creating the report, click **Set Default Filter** from the ellipsis **Actions**.
- Step 2** In the **Date & Time** filter wizard, select the **Date Range** and **Time Range** options and click **Next**.
- Step 3** In the **Key Criteria** filter wizard, select the collections or values from the **Available** selection box and click **Next**.
- Step 4** In the **Field Filters** wizard, select the filter according to the following criteria.

Filter criteria/operators depend on the selected field type (date, numeric/decimal, boolean, or string).

- For **Date**, the options available in Date Range filter are predefined. Using the Date Range drop-down list, select from Custom, Today, Yesterday, This Week, Last Week, This Month, Last Month, Year to Date, or Last Year.
Only Custom will allow the user to customize the Calendar, Time Range and Days certain days of the week.
- For **Decimal**, select an Operator from Equal To, Not Equal To, Less Than, Less Than or Equal To, or Greater Than and then enter a value; for example, Operator = Greater Than and Value = 16.5.
- For **String**, select an Operator from Equal To, Not Equal To, or Matches and then enter a value for the string; for example, Operator = Matches and Value = Team Green.
 - If you select Matches as the Operator, you must specify an SQL pattern to match the string field. The system appends the wild card character % automatically to the beginning and end of the string. You can also use any SQL wild card pattern in between the string.
 - If the filter field is associated with a **Value List**, then specify any value or move one, all, or some items in the list to the Selected column to filter.

Note Use only the Matches operator to filter the report data records with leading or trailing spaces. Do not use the Equal To or Not Equal To operators in such scenarios as Unified Intelligence Center trims the filter criteria before running the SQL query and hence does not fetch the matching results.

- For **Boolean**, select True or False from the Operator list.

Step 5 Using the **Operator** drop-down list, select the criteria.

Note If you select **Matches** operator, you can use any Microsoft SQL wildcard pattern to filter the data. The wildcard character % is added to the beginning and end of every string that is used to filter the data.

Step 6 In the **Value** field, enter a value against which the data in the field will be filtered.

Step 7 Click **Run**.

Report Types

There are three types of reports based on the query types:

- Historical report
- Real-time report
- Live Data report

Report Components

These reports consist of the following components:

- **Data Source**

The Data Source defines the sources that contain the data for the report. Unified Intelligence Center supports three types of data sources: Microsoft SQL Server, IBM Informix, and Streaming. The data source should be pre-configured for you. If it is not, contact your administrator to configure the appropriate data source.

- **Report Definitions**

Each report has a Report Definition, which represents how data is retrieved from the data source for that report template. In addition to specifying how data is retrieved (by a simple MS SQL query, stored procedure query, real time streaming or an anonymous block query), a report definition contains the dataset that is obtained. This includes the fields, filters, formulas, refresh rate, and key criteria field for the report.

- **Reports**

Reports show data returned by Report Definitions. This data is extracted by database queries.

- **Time Zone Conversions**

The time zone conversion happens if there is a difference between the user and the data source time zones.

Daylight savings time consideration for Database Query Reports: The Daylight savings time offset at the start of the date range is considered for the time zone conversion when the report is filtered. If the daylight savings change occurs somewhere in between the filter date and time ranges, the time zone offsets will not be computed properly if the user and the data source are in different time zones. In this case, you will have to split the time filter such that separate report invocations are run before and after the daylight savings time change.



Note The daylight savings time offset depends on the latest system time zone library.



Note Daylight savings start date or end date may (when the data is recorded) create an additional row (in the report output) due to the time zone value change in the SQL database. This applies to any template report, as well as for any query type (Anonymous block, Database Query, Stored Procedure, Real Time Streaming) that these template reports would use. For confirmation that SQL had time zone value change, use the Report Options icon from the report summary page and run the SQL command in AW node to validate the change in the time zone.

Example 1:

User time zone: Australia/Sydney

Data source time zone: America/New_York

Daylight savings time changes: +1 hour for Sydney at 2013-10-06 02:00 a.m. DST +1 hour is already on for New York

Filter selected by the user: 2013-10-06 to 2013-10-06, 12:00 a.m. to 11:59 p.m.

Query formed in data source time zone: 2013-10-05 10:00:00 a.m. to 2013-10-06 09:59:59 a.m.

Report displayed in user time zone: 2013-10-06 12:00 a.m. to 2013-10-07 12:59 a.m.

In this case, the report will display an extra hour of data as Sydney Daylight savings time is off at the start of the date range and on at the end of the date range.

Example 2:

User time zone: Australia/Sydney

Data source time zone: America/New_York

Daylight savings time changes: +1 hour on for Sydney at 2013-10-06 02:00 a.m. DST +1 hour is already on for New York

Filters selected : 2013-10-06 to 2013-10-10, 03:00 a.m. to 11:59 p.m.

Query formed in data source timezone: 2013-10-05 12:00:00 p.m to 2013-10-06 08:59:59 a.m.

Report displayed in user time zone: 2013-10-06 03:00 a.m. to 2013-10-06 11:59 p.m.

In this case, the conversion happens as expected as there is no Daylight savings time change in between the date ranges.

Example 3:

User time zone: America/New_York

Data source time zone: IST

Daylight savings time changes: +1 hour DST at 2013-03-03 02:00 a.m. and off at 2013-11-03 02:00 a.m. for New York. No Daylight savings time changes for IST.

Filter selected by the user : 2013-11-03 to 2013-11-03, 01:30 a.m. to 05:30 p.m.

Query formed in data source time zone: 2013-11-03 11:00:00 a.m. to 2013-11-03 02:59:59 a.m.

Report displayed in user time zone: 2013-11-03 01:30 a.m. to 2013-11-03 04:30 p.m.

In this case, the report will display one hour less of data as New York Daylight savings time is on at the start of the date range and off at the end of the date range.

- **Report Views**

A report can be presented in multiple formats (grid and charts). Each view can have its own set of fields. A single report can have multiple views.

- **Report Help**

You can attach a help page specifically for your report. For more information, see *Add Template Help*.

Related Topics

[Add Template Help](#), on page 23

Historical and Real Time Reports

Historical report—Retrieves data from the historical data source. Reports are populated with interval data that has a default refresh rate of 15 minutes. Historical reports have an upper limit of 8000 rows.

Real-time report—Retrieves data from the real-time data source. Reports are populated with interval data that has a default refresh rate of 15 seconds. Real-time reports have an upper limit of 3000 rows.

While running Cisco Unified Intelligence Center Historical and Real-Time Reports you can:

- Filter data in a report
- Change the view of a report from a grid to a gauge or a chart



Note You can select one of the predefined grid, gauge, or chart views.

For more information on creating/editing views, see [Report Views](#).

- Modify reports

Related Topics

[Report Views](#), on page 32

Live Data Reports

Live Data report—Receives data from streaming data source. Live Data reports supports only grid view.



Note Live Data reports do not automatically respond to changes in the system time. If the server or client time is changed or adjusted, the report must be refreshed to accurately display the duration field values. For example, during a daylight saving time (DST) change, active live data reports do not display correct values in the duration field. Live data reports must be refreshed to update.

Manage Reports

Create Reports

All actions on the Reports interface are based on user role and on the user's object permissions for reports and for categories.



Note By default, reporting users do not have permission to create a subfolder in **Reports**. An Administrator can create a subfolder and grant access.

To create a new report, perform the following steps:

Procedure

- Step 1** In the left navigation pane, choose **Reports**.
- Step 2** Navigate to the folder where you want to create the report.
- Step 3** From the **Reports** toolbar, click **New > Report**.
To edit an existing report, navigate to the report, click the ellipsis icon beside the report and click **Edit**.
- Step 4** In the **Create New Report** window, enter the Report **Name** and **Description**.
Note The report name must be unique to Cisco Unified Intelligence Center.
- Step 5** Click **Next**.
- Step 6** In the **Basic Details** tab, enter or select the report details.
Note Use the arrows to select the appropriate Report Definition.
- Step 7** Click **Next**.
- Step 8** In the **Manage Views** tab, create the report views and click **Next**.
For more information, see [Report Views](#).
- Step 9** In the **Thresholds** tab, create report thresholds and click **Finish**.
For more information, see [Report Thresholds](#).

The newly created report is listed in the **Reports** page.

Related Topics

[Report Filters](#), on page 24

[Report Views](#), on page 32

[Report Thresholds](#), on page 36

Report Views

There are two types of report views:

- Grid View
- Chart View



Note Do not delete the Report Definition fields that are currently associated with any of the manually created report views. If deleted, you must reapply the Data Fields for all the manually created report views to save the report.

For default grid views, the deleted field is removed automatically from the Data Fields list retaining any other fields in the Selected Field list. Hence, no additional action is required to save the report.

Create a Grid View

Grids are tabular presentations of the data in rows and columns. By default, all Cisco stock reports have a grid view. For custom reports, a default grid is created from the SQL query in the Report Definition.



Note Grouping and font size is not supported in Live Data reports.

You can create a Grid View while creating or editing a report.

To create a Grid View, perform the following steps:

Procedure

Step 1 Create or edit a report.

Step 2 Enter the report details in the **Basic Details** screen and click **Next**. The **Manage Views** screen appears with a default grid view.

Note You can access Report permalinks only after completing the report creation. Report permalinks allow you to share your report with other users and view reports of other users. For more information, see *Permalink for a Report*.

Step 3 You can edit the default view (**Actions** column > **Edit View**) or click **Create New** > **Grid view** to create a new grid view.

The **Edit Grid View** or the **New Grid View** screen appears depending on your selection for edit or create.

- Step 4** Enter the **Name** and **Description** in the respective fields.
- Note** Maximum length allowed for the grid view **Name**: 50 characters.
- Step 5** From the **Font** selection box, you can select the font size from the list to display the grid data.
- Step 6** Use the arrow buttons to select fields from the **Available** value list box to move to the **Selected** field list.
- Step 7** You can use the following features to improve grid view display:
- **Header**—Use this feature to add (+) or delete (-) a header for the selected fields. This helps in categorizing the field set.
Note You cannot save the view with empty headers.
Post upgrade to Cisco Unified Intelligence Center 12.0 or later, any empty headers that exist in the report views in prior releases are not migrated.
 - **Edit icon**—In the Selected value list box, click the **Edit** icon (hover on the field value) if you want to edit the **Display Name** and **Column Width** for the selected field and click **Done**.
Note For Header fields, you can only edit the Display Name.
 - **Sort Grid by Field**—Select the **Sort Grid by Field** check box to sort the selected report columns in either **Ascending** or **Descending** order. Selecting this check box enables the drop-down list to be populated with the values from the **Selected** value list box. You can select only one value for sorting.
- Step 8** Click **Save**.
The **Report Views** screen appears.
- Step 9** Click **Finish**.
-

Create a Chart View

Cisco Unified Intelligence Center supports the following chart types:

- **Bar**—Bar charts display discontinuous events and show the differences between events rather than trends. Bar charts are oriented vertically and can be stacked horizontally or clustered one below the other.
- **Pie/Donut**—Pie charts display quantities as proportions of a whole. The circle (pie) represents 100% of the data, with each quantity represented as a wedge of the appropriate size. Pie charts take decimal or numeric fields only. A pie chart cannot have more than 50 wedges. An error occurs if your data set and chart editor selections generate a pie chart with more than 50 wedges.
A doughnut chart is another display representation of a pie chart.
- **Column**—Column charts display discontinuous events and show the differences between events rather than trends. Column charts are oriented horizontally and can be stacked vertically or clustered side by side.
- **Dial Gauge/Numeric**—A gauge chart displays the dial representation of the report results as per the defined threshold.
The Numeric chart displays the report results in a number format highlighted as per the defined threshold.
- **Line charts**—Line charts display continuous quantities over time against a common scale. Use the Line charts to show trends.



- Note**
- Live Data reports do not support chart view.
 - In the vertically oriented charts, for Cyrillic characters, the data labels in the Horizontal Axis field may be hidden or garbled. This is a known limitation. Hence, for Cyrillic characters, use the horizontally oriented charts.

To create a Chart View, perform the following steps:

Procedure

- Step 1** Create or edit a report.
- Step 2** Enter the report details in the **Basic Details** screen and click **Next**. The **Manage Views** screen appears with a default grid view.
- Note** You can access Report permalinks only after completing the report creation. Report permalinks allow you to share your report with other users and view reports of other users. For more information, see *Permalink for a Report*.
- Step 3** Click **Create New > Chart view**.
- Step 4** In the **Create New Chart View** screen, click the required chart type. For more information, see *Chart Types*.
- Step 5** Enter the Chart Information; **Name**, **Description** and click **Next**.
- Note** Maximum length allowed for the chart view **Name**: 50 characters.
- For Cartesian type charts (Bar, Column, and Line), select the **Group Data** check box to group data:
- **By a field**—Select this option to create a chart view where the vertical axis shows fields with footer formula configured for line or column chart and horizontal axis with footer formula for bar chart.
 - **By label field**—Select this option to create a chart view where the vertical axis shows fields of decimal data type for Line or Column chart. In Bar chart, the horizontal axis shows fields of decimal type.
- Note** For Pie charts, you can only **Group Data by Label Field**.
- Step 6** In the **Add Data Fields** screen, select the **Label Field** from the drop-down list and **Data Fields** from the list box and click **Next**.
- Step 7** In the **Preview and Format** screen, enter or select appropriate information based on the selected chart type. For more information, see *Chart Types*.
- Note** For the following Data Fields, the Column Type (Stacked and Grouped) feature is unavailable.
- Date and Time
 - Boolean

Step 8 Click **Save**.

Related Topics

- [Permalink for a Report](#), on page 50
- [Chart Types](#), on page 35

Chart Types

| Chart Type | Chart Information | Add Data Fields | Preview and Format |
|---------------|-------------------|---|--|
| Bar | Yes | Yes | Yes |
| Column | Yes | Yes | Yes |
| Line | Yes | Yes | Yes |
| Gauge/Numeric | No | Yes Note To configure a Gauge chart, Report Definition must have at least one decimal field with footer configured. | Yes You can select Dial Gauge or Numeric view for this report. To set the chart view for Dial Gauge/Numeric, perform the following steps: <ol style="list-style-type: none"> 1. Enter the Range (min and max). Default: 0-100 2. Define the zones. When the chart value is within any of the defined thresholds, <ul style="list-style-type: none"> • The gauge pointer points to the corresponding color set in the threshold. • The Numeric text is displayed in the corresponding color set in the threshold. 3. Click Save. |

| Chart Type | Chart Information | Add Data Fields | Preview and Format |
|------------|-------------------|---|---|
| Pie | Yes | Yes Note To configure a Pie chart, Report Definition must have at least one decimal field configured. | Yes You can select Pie or Donut as the display type for this report. |

Report Thresholds

You can set a threshold indicator for a field to display if the field value meets the threshold condition. There are nine colors instead of the color palette for the threshold color selection in this release. Threshold indicators can be set only for view type **Grid** and **Chart > Gauge**.

For setting field threshold indicators for a **Chart > Gauge** view, see [Create a Chart View](#).

For setting field threshold indicators for a **Grid** view, perform the following steps:

Procedure

- Step 1** From the **Manage Views** screen, after adding the report views, click **Next**. The **Thresholds** screen appears.
- Step 2** Select a view to which you want to set the threshold and select the field name from the **Create new threshold** list. The screen refreshes with a new panel for the selected field name.
- Step 3** Select a field operator and set a condition from the Operator list.

| Operator | Description |
|----------|---|
| Matches | <p>The Matches operator accepts Regular Expressions.</p> <p>Note that the Regular Expressions does not support:</p> <ul style="list-style-type: none"> • Flags (i, g, m, n, y), OR/AND any combinations of these flags. • Leading and trailing forward slash (/). <p>Example:</p> <ul style="list-style-type: none"> • Valid Pattern → \w+\s • Invalid Pattern → ^\w+\s/g <p>(As it contains leading and trailing forward slash (/) and a "g" flag.)</p> |

| Operator | Description |
|--|---|
| String fields; Always, Equal, Not Equal | In Report Definition, if the %format is defined for any field, then while setting the thresholds for that field, ensure to enter the decimal format of the percentage to render the condition in the report. |
| Decimal fields; Always, Equal, Not Equal, Greater Than, Less Than, Greater Than Equal To, Less Than or Equal To, Between | <p>For example:</p> <p>In Report Definition, if %format is defined for the field "SL" (Service Level) and you want to apply thresholds to this field to indicate "Red" if SL is less than 60%, set the following:</p> <ol style="list-style-type: none"> a. Define the threshold for the SL field. b. Set the Operator to Less Than. c. Enter the percentage value as 0 . 60. d. Select "Red" in the No Fill drop-down. e. Click Done. |

Step 4 Choose the options from **No Fill** and edit the threshold fields.

Note You can set conditions on the same or different fields:

- condition on same field: threshold and condition on the same field.
- condition on different field: threshold for a field, based on the condition on the different field.
- multi conditions on same field: apply threshold for a field based on the condition on different fields.

Caution When you upgrade to Unified Intelligence Center version 11.6 or later, all the threshold colors are retained for reports that are created in the earlier versions. But, when you modify the threshold, all the old threshold color selection are lost within the report. Hence, you must reconfigure the threshold color selection for that report.

For existing reports, perform the above mentioned steps to add more thresholds.

Note Threshold configuration supports upto 30 thresholds for a field.

To edit an existing threshold from a report run already, click **Report options** and select **Manage Thresholds**.

Step 5 Format the text in the field to appear when it matches the threshold condition. Use the following options:

- **Text Bold**—Select this check box to highlight the report field in bold.
- **Text/Background Color**—Select a color from the drop-down for the text/background color in the field.
- **Text Substitute**—Enter a new string if you want the text in the field to be replaced with it when it matches the threshold condition.
 - Syntax to add an html hyperlink as text substitute: `cisco`

- Syntax to add an empty space as text substitute: ` `;
- **Image Location**—Enter the URL path of the image if you want the text to be replaced with an image.

Step 6 Click **Done**.

Step 7 Click **Finish**.

Related Topics

[Create a Chart View](#), on page 33

Run Report

Report Actions - Run Mode

The following table lists all the menu items and actions you can perform when you run a report.

Table 5: Report Actions

| Action | Description |
|-----------------------|--|
| Report options | |
| Edit View | Displays the Edit View dialog box. You can modify the current report view and click Done to instantly view the modified view. |
| Save View As | Clones the existing report view. In the Save View dialog box, enter the Name and Description for the cloned view and click Save . The report page refreshes with the cloned view. |
| Create Chart View | For the report that is run, you can directly create a chart view if you have Edit permissions. After you create the chart view, the report page refreshes with the newly created chart view and gets listed in the view list. Note This feature is disabled for Mediasense and Live Data reports. For more information, see <i>Create a Chart View</i> . |
| Group By | Add/remove/update grouping configurations for the current view (columns). Cisco Unified Intelligence Center grid reports support up to three levels of grouping. If you are grouping the column with Date or Date time data type, you can group records on a Daily/Weekly/Monthly basis. For more information, see <i>Group By</i> . |
| Manage Thresholds | Sets a threshold indicator for a field to display if the field value meets the threshold condition. Threshold indicators can be set only for views of type Grid and Gauge. For more information, see <i>Report Thresholds</i> . |
| SQL | Displays the SQL code used to run this report. |

| Action | Description |
|-------------------------|---|
| Export | Exports the already run grid report data into your local disk in a .xls format. Note <ul style="list-style-type: none"> When you export a report to an Excel file format, to read the exported report, the client system's locale must match with the browser's locale (where you had exported the report). When reports are exported to excel in Report viewer, the custom formatting of DECIMAL data type is not applied. |
| Report menu | |
| Run or Pause the report | Click to run or pause the report respectively. |
| Print Report | Prints the report using your default printer. Note Reports in chart view supports only landscape mode in A3 size paper for printing. |
| Manage Filters | Displays Choose Filter dialog box to modify filter criteria for this report. For more information, see <i>Report Filters</i> . |
| Refresh | Refreshes the Report page. |
| View Filter Information | Displays the filter information of the report. |
| Online Help | Displays the configured template help. You can configure template help for the report from the Reports page > Add Help . For more information, see <i>Add Template Help</i> . |
| Only Thresholds | Enable this toggle button to view only rows with matching threshold values in the report. By default, this check box is unchecked for every report. Note This button is disabled for the grouped view. |

Related Topics

- [Create a Chart View](#), on page 33
- [Report Thresholds](#), on page 36
- [Group By](#), on page 39
- [Report Filters](#), on page 24
- [Add Template Help](#), on page 23

Group By

For a report that is run, use the **Group By** option to add/remove/update grouping configurations for the current view. Cisco Unified Intelligence Center grid reports support up to three levels of grouping.

If you are grouping the column with Date or Date Time data type, you can group records on a Daily/Weekly/Monthly basis.



Note Live data reports do not support grouping.

To group the report data, perform the following steps:

Procedure

- Step 1** From the report that is run, click the **Report options** icon and select the **Group By** option.
- Step 2** In the **Group By** dialog box, specify the **Number of Levels** you want to group the report. Depending on the number of levels selected, the Level, Grouped By, Sub Group, and Show Expanded columns are activated.
- Cisco Unified Intelligence Center grid reports support up to three levels of grouping.
- Step 3** To group the report data by values in a particular column, select the required column name from the **Grouped By** list.
- If you select a date or date and time value from the list, you can select any one of the following from the **Sub Group** column:
- None—The report data is grouped by the absolute date or date time values.
 - Daily—The report data is grouped by day.
 - Weekly—The report data is grouped by week.
 - Monthly—The report data is grouped by month.
- By default, the **Show Expanded** option is selected and you can uncheck the option if necessary. The **Show Expanded** column allows you to view the reports that are run with the group expanded.
- Enable the **Show Summary Only** toggle button to display only the summary row in the report.
- For example, if you group by Agent Team and enable the **Show Summary Only** toggle button, only the summary data row for each team is displayed.
- Note** If any of the fields have a footer formula defined in the report definition, then a group level summary is also displayed for such fields using that formula.
- Step 4** Click **Save**.
- Note**
- For the grouped view, the **Only Thresholds** check box is disabled.
 - Thresholds are not displayed in a grouped field and on summary rows.
 - You cannot perform a drill-down from a report with grouped fields.
-

Concurrent Reports

Two hundred Cisco Unified Intelligence Center users can concurrently run the following reports (without XML permalinks):

- Two real-time reports with 100 rows and 10 columns each.
- Two historical reports with 2000 rows and 10 columns each.
- If Live Data is supported by the deployment, two Live Data reports with 100 rows and 10 columns each.

If XML permalinks are included, 30 users in addition to the 200 users specified above—each running one real-time XML permalink and one historical XML permalink—are supported. This action results in 7200 real-time XML permalink executions per hour and 60 historical XML permalink executions per hour, approximately.

Import Reports

You can import the Unified Intelligence Center report, which is in either .xml or .zip file format.

The imported report retrieves data for the following entities:

- Report
- Report Definition
- Value Lists
- Views
- Thresholds
- Drilldowns
- Template Help



Note Each report template help folder has a size limit of 3 MB. If the folder size exceeds this limit, the system does not load the help content.



Note You cannot import Report Filters and Collections.

To import reports, perform the following steps:

Procedure

- Step 1** In the left navigation pane, choose **Reports**.
- Step 2** In the **Reports** listing page, click **Import**.
- Step 3** Click **Browse** to select the file (.xml or .zip format) to be imported.

Note Maximum file size for .zip file format is 60 MB and for .xml file format is 3 MB.

Step 4 Select the required file and click **Open**.

Step 5 Select the file location from the **Save to Folder** list to save the file.

Step 6 Click **Upload**.

Once the file is successfully uploaded, the table gets populated with the corresponding report template, current available version, and incoming version of the files being imported.

Step 7 Select a Data Source for the Report Definition only if the Report Definition for the report being imported is not defined in Unified Intelligence Center.

Step 8 Select a Data Source for the Value List that is defined in the Report Definition.

Note Selection of a Data Source for the Value List is mandatory:

- If the Value List does not use the same Data Source as the Report Definition.
- For Real Time Streaming Report Definitions.

Step 9 Select the files to import or overwrite.

- Overwrite—If the report being imported exists in the Unified Intelligence Center.
- Import—If the report being imported is the new set of report files.

Step 10 Click **Import**.

Note • Importing a report to a different version of Unified Intelligence Center is not supported. However, when you upgrade Unified Intelligence Center, report templates continue to work in the upgraded version.

- Importing manually edited XMLs is not supported.

Export Reports and Folders

You can export any custom or stock report or report folders from the Unified Intelligence Center. Reports and report folders are exported in a ZIP file format.

When you export a folder, the reports in the folder are grouped as ZIP files. The grouping is based on the data source that is used by the report definition and the value lists.



Note

- For customized reports, you must update the version numbers of the value list and report definition before you export the report. Else, the export will not overwrite the existing reports.
- While exporting folders, ensure that all the Value Lists in the report definitions or folders point to the same data source respectively.



Caution Do not modify the exported report (XML file) for customization purposes. However, if necessary, you can modify only the EntityVersion of the Report, Report Definition, and ValueList.

When you export a report, the following data that is associated with the report are exported:

- Report
- Report Definition
- Value Lists
- Views
- Thresholds
- Drilldowns
- Template Help (if not bundled, an empty folder is created in the zip file)



Note Report Filters and Collections are not exported along with the report.

To export a report or a folder, perform the following steps:

Procedure

-
- Step 1** From the left navigation panel, click **Reports**.
- Step 2** Navigate to the report or the report folder that you want to export and click the ellipsis icon beside the report and click **Export**.
- Note** If necessary, you can rename the report or the report folder. Do not change the file extension (Reports or report folder: zip).
- Step 3** Click **OK**.
The exported file is downloaded into your specified local folder.
-



CHAPTER 4

Report and Time zones

- [Reports and Time Zones, on page 45](#)

Reports and Time Zones

You can configure four time zones in Unified Intelligence Center: Server, Data Source, Report and User.

Server

The server time zone is defined during installation while running the installation wizard and it does not affect reports. The server administrator can view and change the server time zone using these CLI commands: `show timezone config` and `set timezone zone`. For more information, see *Administration Console User Guide for Cisco Unified Intelligence Center* at: <https://www.cisco.com/c/en/us/support/customer-collaboration/unified-intelligence-center/products-maintenance-guides-list.html>

Data Source

The data source time zone is defined when the data source is configured. It is the time zone of the database.

Report

The report time zone is defined in the report filter.

If your call center spans several time zones and you intend to compare reports, run historical reports using the absolute date range and a specific time period.

User

The user's time zone is set on the User Profile.

For example, when a user in New York is asked to review a report that was run by a colleague in the China office, the user accesses the User Profile page to change the time zone to match the colleague's, and then runs the report using the same absolute date range.

Time Zone Considerations

The system treats the time-specific data that the user enters as local to the user's time zone and then converts this time to the data source time zone when the filter query is formed.

The system treats the time-specific data that it fetches from a data source as local to the data source and then converts this time to the user time zone before displaying the date and time in the report data.

If the user time zone or data source time zone is not configured, the system uses the time zone of the Unified Intelligence Center server. The system performs these conversions only after the time zone normalization at data source level has occurred.



Note The schedule for Weekly and Monthly reports is based on the data source time zone, not the server time zone. That is, the week and month boundaries are midnight, in the time zone of the database, of the week or month beginning and end days.

Consider the following example, in which the user enters the date and time value in the filter. Depending on the time zone setting, the system converts the time zones in the filter query as shown below:

filter value = **1/1/2010 12:00:00 AM**

| User Time Zone | User Time Zone | Data Source Time Zone | Data Source Time Zone |
|---|---|--|---|
| <i>When set (+11 GMT)</i> | <i>When not set (Subtract Cisco Unified Intelligence Center server time zone)</i> | <i>When set (+2 GMT)</i> | <i>When not set (Add Cisco Unified Intelligence Center server time zone)</i> |
| Thursday, December 31, 2009 3:00:00 PM EET Original Time – User time zone offset (+11 GMT) + Data source time zone (+2 GMT) To Original Time, -9 (-11 +2) hours added | Thursday, December 31, 2009 8:30:00 PM EET Original Time – Cisco Unified Intelligence server time zone (+5.30 GMT) + Data source time zone offset (+2 GMT) From Original Time, 3.30 (- 5.30 +2) hours subtracted | Thursday, December 31, 2009 3:00:00 PM EET Original Time – User time zone offset (+11 GMT) + Data source time zone (+2 GMT) To Original Time, -9 (-11 +2) hours added | Thursday, December 31, 2009 6:30:00 PM IST Original Time – User time zone offset (+11 GMT) + Cisco Unified Intelligence server time zone (+5.30 GMT) From Original Time, 5.30 (-11 +5.30) hours subtracted |
| Thursday, December 31, 2009 6:30:00 PM IST Original Time – User time zone offset (+11 GMT) + Cisco Unified Intelligence server time zone (+5.30 GMT) From Original Time, 5.30 (-11 +5.30) hours subtracted | Friday, January 1, 2010 12:00:00 AM IST To Original Time, 0 (- 5.30 +5.30) hours added | Thursday, December 31, 2009 8:30:00 PM EET Original Time – Cisco Unified Intelligence server time zone (+5.30 GMT) + Data source time zone offset (+2 GMT) From Original Time, 3.30 (-5.30 +2) hours subtracted | Friday, January 1, 2010 12:00:00 AM IST To Original Time, 0 (- 5.30 +5.30) hours added |

The following example shows a database with date and time values. Depending on your time zone setting, the system converts and displays the time zones in the report data as shown below:

Database value = **1/1/2010 12:00:00 AM**

| Data Source Time Zone | Data Source Time Zone | User Time Zone | User Time Zone |
|-----------------------|-----------------------|----------------|----------------|
| | | | |

| <i>When set (+11 GMT)</i> | <i>When not set (Subtract Unified Intelligence Center server time zone)</i> | <i>When set (+2 GMT)</i> | <i>When not set (Add Unified Intelligence Center server time zone)</i> |
|--|--|--|--|
| <p>Thursday, December 31, 2009 3:00:00 PM EET</p> <p>Original Time – Data source time zone offset (+11 GMT) + User time zone (+2 GMT)</p> <p>To Original Time, -9 (-11 +2) hours added</p> | <p>Thursday, December 31, 2009 8:30:00 PM EET</p> <p>Original Time – Unified Intelligence Center server time zone (+5.30 GMT) + User time zone offset (+2 GMT)</p> <p>From Original Time, 3.30 (- 5.30 +2) hours subtracted</p> | <p>Thursday, December 31, 2009 3:00:00 PM EET</p> <p>Original Time – Data source time zone offset (+11 GMT) + User time zone (+2 GMT)</p> <p>To Original Time, -9 (-11 +2) hours added</p> | <p>Thursday, December 31, 2009 6:30:00 PM IST</p> <p>Original Time – Data source time zone offset (+11 GMT) + Unified Intelligence Center server time zone (+5.30 GMT)</p> <p>From Original Time, 5.30 (-11 +5.30) hours subtracted</p> |
| <p>Thursday, December 31, 2009 6:30:00 PM IST</p> <p>Original Time – Data source time zone offset (+11 GMT) + Unified Intelligence Center server time zone (+5.30 GMT)</p> <p>From Original Time, 5.30 (-11 +5.30) hours subtracted</p> | <p>Friday, January 1, 2010 12:00:00 AM IST</p> <p>To Original Time, 0 (- 5.30 +5.30) hours added</p> | <p>Thursday, December 31, 2009 8:30:00 PM EET</p> <p>Original Time – Unified Intelligence Center server time zone(+5.30 GMT) + User time zone offset (+2 GMT)</p> <p>From Original Time, 3.30 (-5.30 +2) hours subtracted</p> | <p>Friday, January 1, 2010 12:00:00 AM IST</p> <p>To Original Time, 0 (- 5.30 +5.30) hours added</p> |



CHAPTER 5

Permalinks

- [Overview, on page 49](#)
- [Permalink for a Dashboard, on page 49](#)
- [Permalink for a Report, on page 50](#)
- [View Report Permalinks in Dashboards, on page 51](#)

Overview

Permalinks in Cisco Unified Intelligence Center are permanent hyperlinks.

Unified Intelligence Center supports the following types of permalinks for reports:

- **Excel Link:** This permalink is generated only for grid view.
- **HTML Link:** This permalink is generated for grid view, gauge view, and chart view.
- **XML Link:** This permalink is generated only for the grid view. It is used where the data is required in XML format.



Note For Live Data reports, you will only have the HTML permalink. HTML permalink for Live Data reports always require authentication.



Note Due to security reasons, permalinks from one Unified Intelligence Center cannot be displayed in the dashboard of another Unified Intelligence Center instance.

Permalink for a Dashboard

Dashboard permalinks help you to share your Dashboards with other users and view Dashboards of other users.



-
- Note**
- You can access the Dashboard permalink only from a web browser.
 - Authenticated Dashboard permalinks are not supported in Cisco Finesse.
 - When an unauthenticated Dashboard permalink is accessed in an authenticated browser session, access to the permalink is controlled by the logged in user's permissions.
-

To view the Dashboard permalink, perform the following steps:

Procedure

Step 1 From the left navigation pane, click **Dashboards**.

Step 2 Click the ellipsis icon beside the required Dashboard and click **Permalinks**.

Step 3 In the **Permalinks** dialog box, click **HTML** to display the Dashboard permalink in the **Link** text box.

- Note**
- By default, all Dashboards are authentication enabled. When the **Authenticate Permalink** check box is enabled, users accessing the permalink are prompted to enter their credentials to view the Dashboard.
 - When you uncheck the **Authenticate Permalink** check box for a Dashboard, users can view that Dashboard using the permalink, without authentication.
- Sharing an unauthenticated permalink of your Dashboard shares even the authenticated report permalinks added into the Dashboard.
- For Dashboards that contain Live Data report, ensure to select the **Authenticate Permalink** check box.

Step 4 Copy and paste the permalink in any browser to view the Dashboard.

Step 5 Click **Save**.

Permalink for a Report

Report permalinks help you to share your report with other users and view reports of other users.



-
- Note**
- Authenticated report permalinks are not supported in Cisco Finesse.
 - Authenticated Excel report permalink is not supported in SSO.
 - When an unauthenticated Report permalink is accessed in an authenticated browser session, access to the permalink is controlled by the logged in user's permissions.
 - You cannot drill down to another report from a report permalink.
-

To view the Report permalink, perform the following steps:

Procedure

- Step 1** From the left navigation pane, click **Reports**.
- Step 2** Click the ellipsis icon beside the required Report and click **Permalinks**.
- Step 3** In the **Permalinks** dialog box, select from the available Link formats; HTML, Excel, XML to display the corresponding Report permalink in the **Link** text box.
- Note**
- By default, the **Authenticate Permalink** check boxes are checked to indicate that the default and variable permalink are authenticated.
 - For Live Data reports, by default, the **Authenticate** check box is checked and disabled.
- Step 4** To view the report,
- HTML and XML Permalink—Copy and paste the permalink (HTML and XML) in any browser
 - Excel Permalink—
- Note**
- To import permalinks in Excel, use the permalinks with FQDN only.
 - To embed excel permalink content as external data within excel on macOS, add **tomcat** certificate from Certificate Management to the trust store of macOS in case self-signed certificates are being used.
- Excel—
- a. Access Excel and navigate to **Data > From Web**.
 - b. In the **New Web Query > Address** field, paste the report permalink and click **Import**.
- Step 5** Click **Save**.
- For information on viewing report permalinks in Dashboards as web page widgets, see *View Report Permalinks in Dashboards*.
- For more information on permalinks, see *Cisco Unified Intelligence Center Report Customization Guide* at <https://www.cisco.com/c/en/us/support/customer-collaboration/unified-intelligence-center/products-user-guide-list.html>.

Related Topics

[View Report Permalinks in Dashboards](#), on page 51

View Report Permalinks in Dashboards

Viewing report permalinks in Dashboards as web page widgets depends on the authentication status of both reports and the dashboards. The following matrix provides different scenarios that supports viewing report permalinks in Dashboards.

| | Auth Report Permalink Same Node | Auth Report Permalink Different Node | Auth Report Permalink Different Cluster | Un-Auth Report Permalink Same Node | Un-Auth Report Permalink Different Node | Un-Auth Report Permalink Different Cluster |
|-------------------|--|---|--|---|--|---|
| Un-Auth Dashboard | Not Supported | Not Supported | Not Supported | Supported | Supported | Supported |
| Auth Dashboard | Supported | Not Supported | Not Supported | Supported | Supported | Supported |
| Dashboard Viewer | Supported | Not Supported | Not Supported | Supported | Supported | Supported |



CHAPTER 6

Schedule Report

- [Overview, on page 53](#)
- [Schedules Actions, on page 54](#)
- [Create a Schedule for a Report, on page 54](#)
- [Daylight Saving Time and Scheduled Reports, on page 58](#)

Overview

You can automate the generation of reports on a regular and recurring basis by setting up a schedule. The Schedules entity lets you run large dataset reports once to be sent to, and viewed by, many users.

Only users with Report Designer and System Configuration Administrator roles can access the Schedules entity. System Configuration Administrators can perform all schedule related functions on any reports. They can view, edit, and run any scheduled report and can create a schedule for any report. Report designers can create a schedule only for those reports that they created or for which they have View permissions.



Attention You cannot schedule Live Data reports.

You can schedule reports to:

- Run at predetermined times
- Automatically email reports
- Save reports to remote location



Note The schedules run based on the server time zone and hence on the Schedules page, the column **Next Scheduled Run** reflects the server time zone.

Schedules Actions

| Action | Description |
|-------------------------------|---|
| Toolbar Actions | |
| Search | Searches for a Schedule. |
| All | Lists all the schedules (Large, Disabled, Email, and SFTP). |
| Large Schedules | Lists all large schedules. |
| Disabled | Lists all disabled schedules. |
| Email | Lists all the schedules configured for email distribution. |
| SFTP | Lists all the schedules configured to be saved in a remote location. |
| Refresh | Refreshes the Schedules page. |
| New | Creates a new schedule. For more information, see <i>Create a Schedule for a Report</i> . |
| Ellipsis (...) Actions | |
| Edit | Edits a schedule. You can also click on the Schedule Name to edit the schedule details. In the edit mode, you can click the icon next to the Schedule name to edit the Schedule properties; Name and Schedule Type. |
| Enable or Disable | Enables or disables a schedule. |
| Delete | Deletes a schedule. |

Related Topics

[Create a Schedule for a Report](#), on page 54

Create a Schedule for a Report



Note You cannot schedule Live Data reports.

Procedure

- Step 1** In the left navigation page, click **Schedules**.
- Step 2** Click **New**.

Step 3 In the **Create New Schedule** dialog box, enter a name for the Scheduler, and select the **Scheduler Type**. The available Scheduler Types are:

- **Large Schedule**

- Visible only for System Configuration Administrator.
- Use Large Schedules for large reports with over 8000 rows.
 - Note** Large Schedules have an upper limit of 25000 rows.
- Large Schedules support only the CSV file formats.
- You can create only one Large Schedule with recurrence frequency of minimum 1 hour.

- **Regular Schedule**

Step 4 Click **Next**.

Step 5 In the **Report Scheduling** tab, select the report to be scheduled, set the filter data, and configure the schedule details.

| Field | Description |
|-----------------|---|
| Report | |
| Report | Select the report to be scheduled. |
| Set Filter | Select this check box to enable the Filter Criteria button. Click the Filter Criteria button to set the filter criteria for the report. For more information on setting filters for a report, see <i>Report Filters</i> . Note If unchecked, the default filter is used. |
| Schedule | |
| Start Date | Click the calendar icon to select the Start Date . Note The Start Date uses the user's time zone settings. If no time zone is set for the user, the reporting server time zone is applied. |
| End Date | Select an option for the End Date : <ul style="list-style-type: none"> • None—indicates no end date. • By—click the calendar icon to select the end date. |

| Field | Description |
|------------|--|
| Recurrence | <p>Specify the recurrence pattern for the scheduled report.</p> <p>Note Schedules that reach the end date are purged after a 24-hour retention period.</p> <ul style="list-style-type: none"> • Once—Specify the time of day for the single occurrence. • Daily—Specify a number for recurrence of days; for example, every four days. • Weekly—Specify the number of weeks and the days of the week that you want the scheduled report to be run. • Monthly—Select a day of the month and specify the number of months that you want the scheduled report to run. <p>Note Use Last to specify the last day of the month.</p> |
| Frequency | <p>Specify the number of times the report must run on the scheduled days.</p> <p>Note The maximum frequency with which you can schedule a report is once in every five minutes.</p> |

Step 6 Click **Next**.

Step 7 In the **Destination Setting** tab, set up a schedule to email the scheduled report and save the report CSV format in a remote location.

You can configure the email server in the Administration Console. Contact the administrator for assistance or for more information, see the *Administration Console User Guide for Cisco Unified Intelligence Center* at <https://www.cisco.com/c/en/us/support/customer-collaboration/unified-intelligence-center/products-maintenance-guides-list.html>.

| Field | Description |
|--------------------|--|
| Email | |
| Email Distribution | <p>Enable the switch and enter the recipient email addresses.</p> <p>Note Email page validation occurs when the email address is entered in the Email Distribution field. No validation is performed if there is no email ID entered in the Email Distribution field.</p> |
| Email View | <p>Select the view of the report that you want to email.</p> <p>Note Only grid views can be scheduled.</p> |
| Email Subject | Enter text for the subject line. |

| Field | Description |
|------------------------|--|
| Email File Type | <p>Select the type of file.</p> <ul style="list-style-type: none"> • INLINE HTML—Sends the report in HTML format. <ul style="list-style-type: none"> • The historical report has an upper limit of 8000 rows. • The real-time report has an upper limit of 3000 rows. • XLS—Sends the report as a Microsoft Excel file attachment. <p>Note The custom formatting of DECIMAL data type is not applied for reports exported in excel.</p> <ul style="list-style-type: none"> • The historical report has an upper limit of 8000 rows. • The real-time report has an upper limit of 3000 rows. • PDF—Sends the report as a PDF file attachment in either landscape or portrait orientation. <p>The generated PDF attachments have the following limitations:</p> <ul style="list-style-type: none"> • Uses standard font sizes. 10 pixels for the landscape orientation and 8 pixels for the portrait orientation. The PDF bypasses the font size that is set in the grid view editor to keep the font output printer-friendly. <p>Note PDF supports images only in the HTTP format.</p> • Retains rows that fit on the page for the selected orientation. Columns that do not fit on the page are truncated. • Only 1000 rows are supported for a PDF file attachment. An email message is sent if the scheduled report exceeds 1000 rows. • Does not support word-wrap for columns. In case of larger text, you can customize the column width in the grid editor to avoid overlaps. As a result, the customization may reduce the number of columns that are shown in the PDF. |
| Remote Location | |
| Protocol | Enable the switch and select SFTP to establish secure connection to the remote location. |
| Report View | Select the view of the report to be posted. |
| Host | Enter the IP address of the remote location. |
| Port | Enter a Port number for the SFTP. The default port number is 22. |
| Directory Path | Enter the location on the host to save your .csv file. Directory Path must be an absolute path. |

| Field | Description |
|---------------------|---|
| User Name, Password | Enter a username and the corresponding password for the host. Maximum Password Length: 50 characters. |
| Test Connection | Click to test the connection. |

- Note**
- Date Time format in a scheduled report of type CSV is: Day_of_week Month Date_of_Month HH:MM:SS SERVER_TIMEZONE YYYY. For Example, Fri Oct 24 01:00:00 EDT 2014.
 - The time field in a scheduled report of type CSV is displayed in seconds only.

Note Scheduled Reports generated using **Remote Location** option does not support formatted reports. To get formatted reports, use **Email** as the **Destination Setting**.

Note When you edit a scheduled report and click **Save**, the scheduler runs and emails the scheduled report to all the recipients that are configured in the **Email Distribution** field.

Step 8 Click **Save**.



Note Scheduler relies on the Refresh Rate parameter in the Report Definition. You can configure the Refresh Rate parameter lower than the Scheduler Frequency.

Related Topics

[Types of Filters](#)

[Report Filters](#), on page 24

Daylight Saving Time and Scheduled Reports

Daylight saving time affects the scheduled reports in the following ways:

1. Reports that are scheduled to run daily during a particular time of the day are skipped for the day when the clock advances (for example, due to daylight saving). For example, for a report that is scheduled to run at 10:30 p.m. daily, if the clock advances by 1 hour then the report that is scheduled to run at 10:30 p.m. will be skipped for that day.
2. Reports that are scheduled to run only once, are updated with a new schedule time with some offset if it falls in the period that advances. For example, if the clock advances by one hour for a report scheduled to run once at 10:30 p.m., then the schedule report run time updates to 11:30 p.m.



CHAPTER 7

View Help

- [View Cisco Unified Intelligence Center Help, on page 59](#)
- [Get Help on Cisco Unified Intelligence Center, on page 59](#)
- [Get Help on a Report, on page 59](#)

View Cisco Unified Intelligence Center Help

In Cisco Unified Intelligence Center, two types of help are available:

- **Application-specific help:** This help content explains how to use Unified Intelligence Center in general.
- **Report-specific help/Template help:** This help content explains how to use the report. The help can describe the fields or provide details of the relationship between the fields, or it can explain how to interpret the data in the report. This help is available only if it has been created for the report.

For more information on how to add the template help to report, see *Add Template Help* section.

Related Topics

[Add Template Help](#), on page 23

Get Help on Cisco Unified Intelligence Center

- Click the **Help** icon on the top right corner of each of the entity listing page to view help contents specific to that entity.
- Click the **Online Help** button on the home page to access the help window for Cisco Unified Intelligence Center.

Get Help on a Report

To get help on a report, perform the following steps

Procedure

Step 1 From the **Reports** page, click the required report to open the report in the run mode.

Step 2 Click the **Template Help** icon in the report toolbar.
The report template help appears in a new browser window.

You can configure template help for the report from the **Reports** page > **Add Help**. For more information, see *Add Template Help* section.

Related Topics

[Add Template Help](#), on page 23



CHAPTER 8

Unified Intelligence Center Gadgets in Cisco Finesse

- [Configure Live Data Gadgets in Cisco Finesse with compositeFilterId](#), on page 61
- [Configure Historical Report Gadgets in Cisco Finesse](#), on page 62
- [Live Data Failover](#), on page 64
- [Gadget Toolbar Improvements](#), on page 64

Configure Live Data Gadgets in Cisco Finesse with compositeFilterId

The `compositeFilterId` filter is used in gadget filter criteria to achieve the advanced filter criteria. The following example illustrates the `compositeFilterId` filter usage for advanced filtering in Cisco Finesse desktop.

To add `mrDomainID` to the existing "Agent Skill Group" live data gadget filter criteria, perform the following steps:

Procedure

- Step 1** Retrieve the existing gadget configuration for "Agent Skill Group" report from the desktop layout:
- ```
<gadget>http://my-cuic-server:8081/cuic/gadget/LiveData/LiveDataGadget.jsp?gadgetHeight=310&viewId=9AB7848B10000141000001C50A0006C4&filterId=agent.id=CL</gadget>
```
- Step 2** Run the "Agent Skill Group" live data report in Unified Intelligence Center and click the **Field Filters** tab.
- Step 3** Copy the Field Filter name to add to the existing filter criteria and assign the filter value as illustrated in the following syntax:

```
<gadget>http://my-cuic-server:8081/cuic/gadget/LiveData/LiveDataGadget.jsp?gadgetHeight=310&viewId=9AB7848B10000141000001C50A0006C4&filterId=agent.id=CL&compositeFilterId=agent.agentMRDs.mrDomainID=<mrdomainId></gadget>
```

Where,

- `filterId` is for basic filter criteria.

- Note** 'loginId' and 'teamName' work as place-holders in the filterId parameter:
- 'loginId' is replaced with the logged in user Id.
  - 'teamName' is replaced with the team that the logged in user belongs to.

- **compositeFilterId** is for Advanced filtering.
- **agent.id** and **agent.agentMRDs.mrDomainID** are the keys to identify the filter field names.
- **CL** is the value for agent.id to identify all the collections on which agent.id has permissions.
- **mrdomainId** is the value for the key agent.agentMRDs.mrDomainID to filter on the given mrdomainId by replacing the tag <mrdomainId> in the above URL.

**Ensure to:**

- Replace <my-cuic-server> with the FQDN of the Cisco Unified Intelligence Center server.
- Use HTTP or HTTPS based on how the Cisco Finesse desktop is being accessed.
- Replace <mrdomainId> with the appropriate mrdid.

- Note**
- If the filter is associated with a value list (example in the above URL), <mrdomainId> can be replaced with CL to consider all the collections of the value list in the following syntax:

```
compositeFilterId=agent.agentMRDs.mrDomainID=CL
```

This example is for illustration purpose only. (As mrdomainId cannot be associated with a value list based on existing 'Agent Skill Group' stock report.)

- For configuring multiple views in the gadget, use viewId, filterId and compositeFilterId parameters with numbering in the gadget URL like: viewId\_{1...5}, filterId\_{1...5}, compositeFilterId\_{1...5}

```
<gadget>http://my-cuic-server:8081/cuic/gadget/LiveData/LiveDataGadget.jsp?
gadgetHeight=310&viewId_1=9AB7848B10000141000001C50A0006C4&
filterId_1=agent.id=CL&compositeFilterId_1=agent.agentMRDs.mrDomainID=1&
viewId_2=99E6C8E210000141000000D80A0006C4&filterId_2=agent.id=CL%20teamName&
compositeFilterId_2=agent.agentMRDs.mrDomainID=1<mrdomainId></gadget>
```

## Configure Historical Report Gadgets in Cisco Finesse

Use the following code snippet to configure the Cisco Unified Intelligence Center Historical reports in Cisco Finesse Desktop.





**Note** In Enterprise deployment (Unified CCE and Packaged CCE), Cisco Unified Intelligence Center Historical reporting gadget is available out of the box on Cisco Finesse Supervisor desktop only and is not supported on Agent desktop.

For Historical Gadgets, only one view is supported.



**Note** Cisco Unified Intelligence Center Historical Report does not support Grouping and Drill-downs in Cisco Finesse Desktop.

### Code Snippet

```
<gadget>https://<my-cuic-server>:8444/cuic/gadget/Historical/HistoricalGadget.jsp?gadgetHeight=310
&viewId=F2D86F191000015B000000640A4E5A54&linkType=htmlType&viewType=Grid
&EventTime=RELDATE%20LASTWEEK&User=VL%20CUIC%5Cadministrator</gadget>
```



**Note** '~loginId~' and '~teams~' work as place-holders in the filter criteria:

- '~loginId~' is replaced with the logged in user Id.
- '~teams~' is replaced with the teams that the logged in user supervises.

### Examples:

```
https://my-cuic-server:8444/cuic/gadget/Historical/HistoricalGadget.jsp?viewId=
BD9A8B7DBE714E7EB758A9D472F0E7DC&linkType=htmlType&viewType=Grid&refreshRate=900&@start_date=
RELDATE%20THISWEEK&@end_date=RELDATE%20THISWEEK&@agent_list=CL%20~teams~&gadgetHeight=360
```

```
https://my-cuic-server:8444/cuic/gadget/Historical/HistoricalGadget.jsp?viewId=
BD9A8B7DBE714E7EB758A9D472F0E7DC&linkType=htmlType&viewType=Grid&refreshRate=900&@start_date=
RELDATE%20THISWEEK&@end_date=RELDATE%20THISWEEK&@agent.id=~loginId~
```

- `https://<my-cuic-server>:8444/cuic/gadget/Historical/HistoricalGadget.jsp?gadgetHeight=310`  
—Indicates the Historical Gadget URL.
- `&viewId=F2D86F191000015B000000640A4E5A54&linkType=htmlType&viewType=Grid`  
—Indicates the default report permalink filters.



**Note** You can retrieve this information from any report permalink.

- `&EventTime=RELDATE%20LASTWEEK&User=VL%20CUIC%5Cadministrator</gadget>`

—Indicates the variable parameters that you can customize in addition to the default report permalink.

For more information on applying the variable parameters, see *Variable Parameters in a Permalink* section in the *Cisco Unified Intelligence Center Report Customization Guide* at <https://www.cisco.com/c/en/us/support/customer-collaboration/unified-intelligence-center/products-user-guide-list.html>.

## Live Data Failover

Live Data reports can be viewed as gadgets in the Cisco Finesse desktop and on the report viewer in Unified Intelligence Center. Live Data failover occurs when any of the following fails:

- Live Data Socket.IO Service
- Network Connectivity
- Live Data Web Service
- Intelligence Center Reporting Service
- Unified CCE Live Data NGINX Service

“Live Data is not available after repeated attempts. Retrying” message is displayed during failover when the gadget and the report viewer aren’t able to connect to the primary and secondary Live Data server. The gadget and Unified Intelligence Center continue to retry until it connects to one of the servers and regain updates to the reports.

## Gadget Toolbar Improvements

Cisco Unified Intelligence Center provides you with a toolbar on Live Data reporting gadget on the Cisco Finesse Desktop.

You can remove this toolbar by configuring the parameter **hideGadgetToolbar** to *true* in the gadget URL.

For example: `<gadget>https://my-cuic-server:8444/cuic/gadget/LiveData/LiveDataGadget.jsp?gadgetHeight=150&hideGadgetToolbar=true&viewId=EF94123F10000164000000FD0A6B2D41&filterId=AgentCallLogDetailStats.agentID=loginId</gadget>`




---

**Note** If the parameter `hideGadgetToolbar` is unavailable in the gadget URL or if it is set to `false`, then the toolbar is displayed by default.

---

### Reports View Selector

As a reporting gadget user, you can select and view multiple reports from the Reports View Selector on the toolbar.

The Reports View Selector is a drop-down list that displays the list of reports in the **Report name - View name** format. The Report View Selector list allows you to view the five report views.




---

**Note**

- For Historical Gadgets, only one view is supported.
- To add a new report to the Reports View Selector, contact the Cisco Finesse Administrator.

---

### Toolbar Hide or Unhide

The gadget toolbar displays an arrow tab in the center to hide and unhide the toolbar.

Click the arrow tab to hide the toolbar on the reporting gadget to get a clear view of the report.

When you click the arrow tab again, the toolbar becomes visible on the gadget. When you hover over the arrow tab, the hide and unhide message is displayed.

### Pause and Play

You can pause and resume event updates in Live Data gadgets using the pause or play icons respectively. As a reporting user, the pause or play button works as follows:

- Pause - The updates are stopped.
- Play - The updates resume and are displayed on the gadget.



---

**Note** When the button is paused and updates are available on the gadget, a notification appears over the pause or play button.

---

### Show Threshold Only

When you check the **Show Thresholds Only** box, only rows with matching threshold values are displayed in the report. By default, this check box is unchecked for every report.

### Gadget Help

The gadget toolbar displays a Help icon. When you click the help icon, a window appears, displaying the report template help for the relevant reporting gadgets.

