



Visual Customizations

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Overview

Stock reports are the reports that are pre-bundled and supported by Cisco. The stock reports can be copied and these copied versions can be edited to visually customize them. Save a copy of the report with a different name.



Note Reporting users do not have permission by default to create a subcategory under Reports. An Administrator should create a subcategory and grant access, so you can create a subcategory within the new subcategory.

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. You can create additional grid views for the stock reports. For custom reports, a default grid is created from the SQL query in the Report Definition.



Note Grouping is not supported in Live Data reports.

The steps below describe how to create a Grid View:

Procedure

Step 1 Navigate to **Reports**.

- Step 2** Click **Reports** to display **Available Reports**.
- Step 3** Expand the **Reports** folder.
- Step 4** Locate the report in the appropriate folder.
- Step 5** Right-click on the report and select **Edit Views**. A new tab that contains all the views of the report opens.
- Step 6** Under **Create**, select **Grid** from the drop-down list. A new page opens.
- Step 7** Enter the **Name** and **Font Size** in the fields provided.
- Step 8** Enter a **Description** for the grid view.
- Step 9** Select the required fields for the grid view in **Available Fields**.
- Step 10** Click **Select** to add the selected fields to **GridHeaders** in the **Current field order in the grid** box. You can also perform the following:
- Click **Select All** to add all the available fields to **GridHeaders**.
 - Click **Add Header** to add a new folder in **GridHeaders**.
 - Click **Remove Selected** to remove an item in **GridHeaders**.
 - To group reports, click the **Grouping** button to open a new page.
 - Specify the appropriate value for **Number Of Groups**.
 - Select the appropriate value for **Unique Value Vertical Alignment**.
 - Click the drop-down list corresponding to **Sorted By** and select the appropriate field.
 - Click **OK**. The previous window opens.
- Note** For more information on grouping, see **Grouping**.
- Step 11** Click **Save** to save the new view you have created.
- Step 12** Click **Save As** to rename the view.
- Step 13** Click **Cancel** to abort the changes and exit the Grid Editor.

Create a Gauge View

Gauges display the status of a single report metric (number). They are not intended to display multiple metrics or complex interrelationships. A gauge in Unified Intelligence Center is similar in function and in appearance to the speedometer in your automobile. The gauges you design in Unified Intelligence Center are semicircular graphics with a moving needle. Gauges show a visual indicator that a value is within a normal range.



Note Live Data reports does not support Gauge view.



Note If the field does not have a footer, you see an error saying that the footer value is null or is not a number when you run the report. You need to set the footer for the field.

The steps below describe how to create a Gauge View:

Procedure

- Step 1** Navigate to **Reports**.
- Step 2** Click **Reports** to display **Available Reports**.
- Step 3** Expand the **Reports** folder.
- Step 4** Locate the report in the appropriate folder.
- Step 5** Right-click on the report and select **Edit Views**. A new tab that contains all the views of the report opens.
- Step 6** Under **Create**, select **Gauge** from the drop-down list. A new page opens.
- Step 7** Click the drop-down corresponding to **Field**, and select the appropriate field.
- Step 8** Enter the **Name**, **Description**, **Range** and **Number of scale markers** in the fields provided.
- Step 9** Select the appropriate **Scale options**.
- Step 10** Under **Thresholds**, enter the appropriate **Value** for each threshold level.
- Step 11** Check the check box corresponding to a specified level to set the threshold levels.
- Step 12** Check the check box corresponding to **Level** to set all the four threshold levels.
- Note** The four predefined threshold levels are **Warning**, **Minor**, **Major** and **Critical**. You can see a graphical preview of the Gauge when you select the threshold levels using the check boxes.
- Step 13** Click **Save As** to save and rename the gauge view.
- Step 14** Click **Save and close** to save and close the gauge view.
- Step 15** Click **Save** to save the new gauge view.
- Step 16** Click **Refresh** to reset the values in the page.
- Step 17** Click **Cancel** to abort the changes and exit the Gauge View editor.
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Create a Chart View

Cisco Unified Intelligence Center offers three types of charts, namely Pie, Column, and Line Chart.

- Pie--Pie charts present 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/numeric fields only. A pie chart cannot have more than 50 wedges. If your data set and chart editor selections generate a pie chart with more than 50 wedges, an error is displayed.
- Column--Column (Bar) charts display discontinuous events and show the differences between events rather than trends. Column charts can be oriented vertically or horizontally and can be stacked vertically or clustered side-by-side.
- Line charts--Line charts show continuous quantities over time against a common scale. They are good for showing trends.



Note Live Data reports does not support Chart view.



Note In Cyrillic characters, for vertically oriented charts, the data labels in the Horizontal Axis field may not appear at all or may be garbled. This is a known underlying limitation. You should view the horizontally oriented charts for Cyrillic.

The steps below describe how to create a Chart View:

Procedure

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- Step 1** Navigate to **Reports**.
- Step 2** Click **Reports** to display **Available Reports**.
- Step 3** Expand the **Reports** folder.
- Step 4** Locate the report in the appropriate folder.
- Step 5** Right-click on the report and select **Edit Views**. A new tab that contains all the views of the report opens.
- Step 6** Under **Create**, select **Chart** from the drop-down list. **General Settings** page opens.
- Step 7** Click the drop-down list corresponding to **Chart Type**, and select the appropriate field.
- Step 8** Enter the **Chart Name**, and **Chart Description** in the fields provided.
- Step 9** Check the check boxes corresponding to the following based on your requirement:
- **Accessible Mode:** Check this box to add fill patterns (stripes and dots) to chart colors and make them easier to distinguish.
 - **Dynamic Dataset:** For line and column charts, check this to transform data into a summarized format.
 - Note** Not available for pie charts.
 - Line and column charts use Dynamic Dataset OR Use Report Footer, but not both.
 - **Use Report Footer:** Check this if you want the repeated data in the chart to be grouped or collapsed by the field's footer.
 - Note** Line and column charts use Dynamic Dataset OR Use Report Footer, but not both.
- Step 10** Click on the drop-down list box next to **Legend Placement** to select either **Right** or **Bottom**.
- Step 11** Specify the value for **Maximum Legend Label Length**.
- Step 12** Under **Data Change Effect**, click the drop-down list box next to **Type** to select the appropriate field.
- Step 13** Click **Next** to open **Series Settings** page.
- Step 14** Under **Series**, click the drop-down list boxes next to **Data Field** and **Label Field** to select the appropriate fields.
- Note** This option is applicable only for Pie chart series.
- Step 15** Under **Labels**, click the drop-down list boxes next to **Label Position** and **Label Format** to select the appropriate fields.
- Note** This option is applicable only for Pie chart series.

Note Skip steps 16 to 20 for Pie chart series. Perform these steps only for Line Charts and Column Charts series.

- Step 16** Click **Next** to open the **Column Chart Series Settings** page.
- Step 17** Select the **Axis: Type and Fields**. This panel appears on the right if you select a vertical orientation on the General Settings page. It appears on the left if you select a horizontal orientation.
- Step 18** Click **Next** to open the **Column Chart Series Settings Series Descriptions/Legend Labels** page.
- Step 19** Enter the **Horizontal Axis Type** and **Vertical Axis Type** information. Axis Type option(s) are determined by the data type of the field.
- Step 20** Click **Next** to open the **Summary** page.
- Step 21** Click **Save & Preview** button to preview the chart.
- Step 22** Click **Save & Exit** to save the chart and exit the page.
- Step 23** Click **Cancel** to abort the changes and exit the **Chart Editor**.

Grouping



Note Live data reports does not support grouping.

Follow these steps to format the report groups:

Procedure

- Step 1** Select the **Reports** drawer in the left pane.
- Step 2** Right-click the report in which you want to format the grouping , and select **Edit views**.
- Step 3** Select the view where you want to format the grouping, and click **Edit**.
- Step 4** Click the **Grouping** button to open a new page.
- Step 5** Specify the appropriate value for **Number of Groups**. You can select zero, one, two, or three groups in the report.
- Step 6** From **Unique Value Vertical Alignment**, select **Top**, **Middle**, or **Bottom** to specify where you want the name of the group to display in the report column.
 - Note**
 - Check the **Show Summary Only** check box if you want to see only the summary and is available for all fields.
 - Thresholds will not be visible in a grouped field and on summary rows.
- Step 7** From **Grouped By**, choose a value from the drop-down list. The report data is grouped by this value. If you choose a date or date and time value from the drop-down list, select one of the following options:
 - **None**--The report data is grouped by the value and not by day, week, or by month.
 - **Daily**--The report data is grouped by day.
 - **Weekly**--The report data is grouped by week.

- Monthly--The report data is grouped by month.

Step 8 Check the **Show Summary** check box to include a summary row in the report for the grouping. For example, if you group by Agent Team and check the **Show Summary** check box, a row of summary data for each team is displayed.

- Note**
- When you check the **Show Summary Only** check box, the **Show Summary** check box becomes unavailable.
 - When you check the **Show Summary Only** check box for grouping, reports can be sorted by columns defined in **Grouped By** only.

Step 9 From **Sorted By**, choose a value from the drop-down list. The report data is sorted by this value.

Step 10 Click **OK**.



Note You cannot perform a drilldown from Grouped fields. To determine if a field is grouped:

- Open the Grid Editor for the report. Click **Grouping**.
- From the **Grouping** dialog box, determine if the field appears in any of the **Grouped By** fields.

Set Threshold Indicators for Fields

You can set threshold indicators for fields to show if a field value crosses or falls behind a particular value. Threshold indicators can be set only for views of type **Grid** and **Gauge**.

Setting threshold values for a **Gauge** view is described in the procedure for creating a gauge view. For more information about creating a **Gauge** view, see [Create a Gauge View, on page 2](#).

For more information about creating a **Grid** view, see [Create a Grid View, on page 1](#). For setting field threshold indicators for a **Grid** view, follow the steps below.

Procedure

Step 1 Select the **Reports** drawer in the left pane.

Step 2 Right-click the report in which you want to set the field thresholds, and select **Save As**. The Save As dialog box appears.

Step 3 Provide details for the mandatory fields like **Name** and **Report Category**.

Step 4 Click **Ok** to save this report. The new report is created with the report name as provided by you in the earlier step .

Step 5 Click **Refresh** to view all the existing reports in the **Reports** drawer in the left pane.

Step 6 Right-click the report that you last saved. It is the report in which you want to set the field thresholds, and then select **Edit**.

Now you will find the **Edit views** option that is clickable.

Step 7 Select the view where you want to set the field thresholds, and click **Edit**.

Step 8 In the box **Current field order in the grid**, right-click the field for which you want to set thresholds, and select **Thresholds**.

Step 9 In the thresholds window, click **Add** to add a new threshold.

- Note**
- The users should not configure more than 30 thresholds for a field.
 - To edit an existing threshold, select the threshold, and click **Edit**.

Step 10 In the **Type** drop-down list, select the condition by which you want the threshold values to be checked against the current value of the field. In the field that appears next, enter a value or expression as required.

Note If you are using an expression, check the **Regular Expression** check box.

Step 11 Format the text in the field to appear when it matches the threshold condition. Use the following options:

- a) **Bold**—Check the check box to bold the text.
- b) **Text Color**—Select a color for the text in the field.
- c) **Background Color**—Select a background color for the field.
- d) **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.
- e) **Image Location**—Enter the path of the image if you want the text to be replaced with an image if it matches the threshold condition. You can either use the image URL or path.

Step 12 Click **OK**.

Step 13 Click **OK** again and then click **Save**.

Note For more details on how to create permalink for Finesse gadget equivalent live data report, see *Create Permalink for Finesse Gadget Equivalent Live Data Report*.

For more details on how to modify the Live Data stock reports in Cisco Unified Intelligence Center and add the modified report to the Finesse desktop layout see, *Cisco Unified CCX Administration Guide*.
