Create Custom Reports

Overview

You *cannot* create new reports with the Unified Intelligence Center (Standard license) that is embedded with Unified CCX. To create new custom Historical reports, you need to install a Standalone Unified Intelligence Center with premium license. The version of the Standalone Unified Intelligence Center should be the same or older than the Unified Intelligence Center that is embedded in Unified CCX.

To install Standalone Unified Intelligence Center, see the , located at:

https://www.cisco.com/en/US/products/ps9755/prod_installation_guides_list.html.

Attention You *cannot* create custom Live Data reports.

Note The "Do Not Call" field is no longer available in Unified CCX 11.0(1) release onward. While upgrading to Unified CCX 11.0, report will not be generated if the "Do Not Call" column is present in the custom report. You can generate the report by removing the "Do Not Call" column from the custom reports in Unified CCX 11.0(1).

How to Create Custom Reports

The following table describes the task flow to create a new Historical report:

Table 1: Task Flow to Create Custom Reports

Sequence	Task	Where performed	Reference
1	Create Unified CCX datasource	Standalone Unified Intelligence Center	See Create Unified CCX Data Source, on page 2. See the "Standalone Cisco Unified Intelligence Center Configuration" section of the Cisco Unified Contact Center Express Administration and Operations Guide , located at: https://www.cisco.com/en/US/products/sw/custcosw/ps1846/products_installation_and_configuration_guides_list.html.
2	Create custom stored procedure	Unified CCX	See Create Custom Stored Procedure, on page 3.
3	Create report definition	Standalone Unified Intelligence Center	See the "Create or edit report definitions" section of the , located at: https://www.cisco.com/en/US/products/ps9755/products_user_guide_list.html .
4	Export custom report	Standalone Unified Intelligence Center	See the "Export reports, report definitions, and categories" section of the , located at: https://www.cisco.com/en/US/products/ps9755/products_user_guide_list.html .
5	Import custom report to Unified CCX	Unified Intelligence Center embedded in Unified CCX	See the "Import Reports" section of the *Cisco Unified Contact Center Express Report User Guide*, located at: https://www.cisco.com/en/US/products/sw/custcosw/ps1846/products_user_guide_list.html.
6	Set permissions to the new custom report	Unified Intelligence Center embedded in Unified CCX	See the "Manage user permissions" section of the Cisco Unified Contact Center Express Administration and Operations Guide , located at: https://www.cisco.com/en/US/products/sw/custcosw/ps1846/products_installation_and_configuration_guides_list.html.

Create Unified CCX Data Source

Create a Unified CCX data source on the Standalone Unified Intelligence Center server that points to the Unified CCX server.

Note Do not create a data source in the Unified Intelligence Center (Standard license) that is bundled with Unified CCX. This scenario is not recommended and not supported.

Procedure

Step 1 Set the password for the Historical Reporting User.

a) Log in to Cisco Unified Contact Center Express Administration using the Unified CCX username and password.

b) Select **Tools** > **Password Management**.

c) In the Historical Reporting User field, set the password, and click **Save**.

Step 2 Record settings of the existing Unified CCX data source.

a) Log in to Unified Intelligence Center on the Unified CCX server.

b) In the left pane, click **Data Sources**.

The **Data Sources** page opens in a separate tab in the right pane.

c) Select the Unified CCX data source and click **Edit**.

d) Record the settings in the page so that you can refer to this data later.

Step 3 Configure a data source on the Standalone Unified Intelligence Center server to point to the Unified CCX server.

a) Log in to the Standalone Unified Intelligence Center using credentials that has report designer permissions.

b) In the left pane, click **Data Sources**.

c) Click **Create** to create a new data source.

d) Set the parameters as per the settings you recorded in **Step 2d**.

Note The database user name should be **uccxhruser** and the password should match the password you set in **Step 1c**.

e) Click **Test Connection** and verify the settings.

Tip If an error is prompted, verify that the settings are correct and try again.

Create Custom Stored Procedure

Note Perform the following steps for both Unified CCX nodes, if applicable.

The Unified CCX database schema details are described in the *Database Schema Guide for Cisco Unified CCX and Cisco Unified IP IVR*, located at:

https://www.cisco.com/c/en/us/support/customer-collaboration/unified-contact-center-express/products-technical-reference-list.html.

Procedure

Step 1 Connect to the db_cra database using the **uccxhruser** username and password.

Step 2 Create a stored procedure using third-party tools such as SQuirrel SQL Client and AGS Server Studio.

Step 3 Assign execution privileges for the stored procedure to **`uccxHrUserRole`** using the following command:

Example:

grant execute on *<your procedure name>* to 'uccxHrUserRole';

What to do next

See the task flow table in .