Manage and Run Reports

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 1: 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 **WRITE** permissions. **Note** You cannot create folders inside the Stock folder.

Action	Description
Import	Imports a report. To import a report, you need the REPORT DESIGNER role and **WRITE** permission on the target folder where you want to import these reports. For more information, see *Import Reports*. **Note** Applies to all folder levels (root, subcategory, and report).
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.
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** • 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: • Parentheses (( )) • Angle brackets (<,>) • Forward slash (/) • Question mark (?) • Quotes (") • Any executable scripts; JavaScript

Action	Description
Rename	Renames a folder or a report. **Note** You cannot rename a Stock folder or a Stock report. **Note** Applies to the root-level folder.
Move	Moves Report or Folder from one folder to another. **Note** • 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.
Add Help	Hosts the help page for Report Templates. For more information, see *Add Template Help*.
Delete	Deletes a report or a folder. **Note** • 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. • You cannot delete a Stock folder or a Stock report.
Share	Assigns appropriate permissions to access and manage the Report. **Share**—Grants **View** and **Edit** permissions for the Report within your group.
Permalinks	Displays the Report permalink. For more information, see *Permalink for a Report*. **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 report.

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.

Run Reports

Procedure

Step 1 In the left pane of the Unified Intelligence Center application, click **Reports**.
Reports open in a separate tab.

Step 2 In the **Reports** tab, access one of these reports as required:

a) For Historical reports, click **Stock** > **Unified CCX Historical**.
b) For Live Data reports, click **Stock** > **Unified CCX Live Data**.

Step 3 Click a report category under **Unified CCX Historical** or **Unified CCX Live Data** as required.

Step 4 Click the report that you want to generate.
The report opens in a separate tab.

Step 5 Set any filters that you want.

Step 6 Click **Run**.

Tip Scroll up to see **Run**.

Step 7 (Optional) If you are generating Live Data reports for the first time an error message appears after approximately 30 seconds, follow the below steps.

a) Trust the self-signed certificate. See Trust Self-Signed Certificate for Live Data Reports, on page 5.

b) Follow **Steps 1 to 6** to generate the report again.

The report is displayed in the Report Viewer.

Trust Self-Signed Certificate for Live Data Reports

When you generate Live Data reports for the first time, an error message appears after approximately 30 seconds.

Procedure

Perform the following steps to trust the self-signed certificate:

Option	Description
If you use Internet Explorer:	**1.** When you click **Run** the following message appears: `Internet Explorer blocked this website from displaying content with security certificate errors.` **2.** Click **Show content**.
If you use Firefox:	**1.** When you click **Run** the following message appears: `Cannot connect to the notification service. Click OK to be redirected to a page where you can add a security exception for the certificates issued by the CUIC server, after which the current page will be reloaded. If the condition persists, contact your administrator.` **2.** Click **OK**. A page appears that states this connection is untrusted. **3.** Click **I Understand the Risks**, and then click **Add Exception**. The **Add Security Exception** dialog box appears. **4.** On the **Add Security Exception** dialog box, ensure the **Permanently store this exception** check box is checked. **5.** Click **Confirm Security Exception**. The page that states this connection is untrusted automatically closes.

Save an Existing Stock Report

Note Contact administrator to assign permissions to the saved report.

Procedure

Step 1 From the **Actions** column, click the **Ellipsis (...)** icon and select **Save As**.

Step 2 In the **Save As** window, enter a name for the report in the **Name** field.

Step 3 Enter a brief description of the report in the **Description** field.

Step 4 Drill down and select a report category in the **Report Category** field.

Step 5 Assign permissions in the **Permissions** section.

Step 6 Click **OK**.

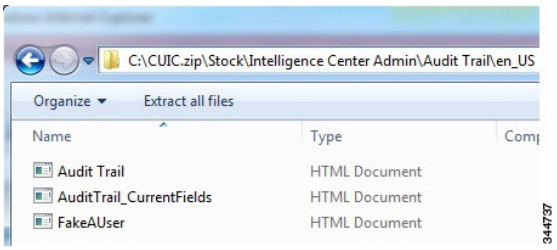
Step 7 You can customize the report as required and click **Save**.

Import Reports

You can import a report (XML) and the associated template help file (ZIP format) into Cisco Unified Intelligence Center.

The following directory structure illustrates an imported report sample for storing the report and help content.

Figure 1: Directory Structure of the Report ZIP File



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

You can import the following:

- Report
- Report Definition
- Value Lists
- Views

- Report Editor values
- Thresholds
- Drilldowns
- Permissions
- Template Help

Note You cannot import the Report Filters and Collections.

To import a report, perform the following steps:

Procedure

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

Step 2 On the Reports toolbar, click **New** > **Import**.
You will be redirected to the legacy interface.

Step 3 Navigate to the folder where you want to import the report.

Note If you are importing a stock report bundle from Cisco.com, it must be placed at the Reports folder level.

Step 4 Click **Import Report**.

Step 5 In the **File Name (XML or ZIP file)** field, click **Choose File**.

Step 6 Browse to and select the XML or the compressed report file, and click **Open**.

Step 7 From the **Data source for ReportDefinition** drop-down list, select a data source used by the report definition.

Note This field appears only if the Report Definition for the report being imported is not currently defined in Unified Intelligence Center.

Step 8 From the **Data Source for ValueList** drop-down list, select the data source used by the value lists defined in the report definition.

Note You have to select a data source for the value list only if it does not use the same data source as the Report Definition. For Report Definitions of Real Time Streaming, it is mandatory to select a data source for the Value Lists.

Step 9 In the **Save To** field, browse to the folder where you want to place the imported report. Use the arrow keys to expand the folders.

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.

Export Reports, Report Definitions, and Folders

You can export any custom report, report definition, or report folders from legacy interface. Reports and report folders are exported in a ZIP format and report definitions are exported as an individual XML file.

When you export a folder, the reports in the folder are grouped together as ZIP files. The grouping is based on the data source used by the report definition as well as 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 default reports.
- 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).
- While exporting report definitions or folders, ensure that all the Value Lists in the report defnitions or folders point to the same data source respectively.

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

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

- Report
- Report Definition
- Value Lists
- Views
- Preferences defined in the Report Editor
- Thresholds
- Permissions
- Online 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/report definition/folder, perform the following steps:

Note For illustration, exporting a report is documented in the following steps. Perform the same steps to export report definition and folder.

Procedure

Step 1 From the left navigation panel, click **Report Definitions**.
You will be redirected to the legacy interface.

Step 2 Click the Reports drawer and browse to the report that you want to export.

Step 3 Right-click the report and select **Export**.

Note If required, you can rename the report. Do not change the file extension (Reports: zip and Report Definitions: XML).

Step 4 Click **OK**.
The exported file is downloaded into your Downloads folder.