



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. 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 Information** screen and click **Next**.
The **Manage Views and Thresholds** 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 11.6, 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**.
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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 Information** screen and click **Next**.
The **Manage Views and Thresholds** 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**.

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.

Group By

For an executed report, 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 an executed report, 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 executed reports 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.
- You cannot perform a drill-down from a report with grouped fields.

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 and Thresholds** wizard, 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

Operator	Description
	(As it contains leading and trailing forward slash (/) and a "g" flag.)
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"> 1. Define the threshold for the SL field. 2. Set the Operator to Less Than. 3. Enter the percentage value as 0 . 60. 4. Select "Red" in the No Fill drop-down. 5. 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 an executed report, 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**.
