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Change History

<table>
<thead>
<tr>
<th>Change</th>
<th>See</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Changed topics under chapter Report Management</td>
<td>Report Management, on page 5</td>
<td></td>
</tr>
<tr>
<td>Changed topics under chapter Filter Data in a Report</td>
<td>Filter Data in a Report, on page 21</td>
<td></td>
</tr>
<tr>
<td>Procedure to Permalink a Report is changed</td>
<td>Permalink to a Report, on page 40</td>
<td></td>
</tr>
</tbody>
</table>

About This Guide

This guide explains the user interface and functionality in the Cisco Unified Intelligence Center reporting application.
Audience

This guide is intended for users who use Cisco Unified Intelligence Center to run reports. The user can generate reports, filter data in a report, and schedule a report.

Related Documents

• Guides for the Cisco Unified Intelligence Center
• Developers' Forum for the Cisco Unified Intelligence Center

Obtaining Documentation and Submitting a Service Request

For information on obtaining documentation, using the Cisco Bug Search Tool (BST), submitting a service request, and gathering additional information, see What's New in Cisco Product Documentation.

To receive new and revised Cisco technical content directly to your desktop, you can subscribe to the What's New in Cisco Product Documentation RSS feed. RSS feeds are a free service.

Documentation Feedback

You can provide comments about this document by sending an email to the following address:

contactcenterproducts_docfeedback@cisco.com

We appreciate your comments.
Introduction to Cisco Unified Intelligence Center

Welcome

Cisco Unified Intelligence Center is a reporting platform for users of Cisco Contact Center products. From release 11.5, you are provided with a new Unified Intelligence Center page. As a reporting user, you can use the new Unified Intelligence Center page to perform these tasks:

• Create, view and run reports
• Filter data in a report
• View permalink for reports
• Set sharing permissions for a report
• Select language for accessing CUIC
• Search a report
• Favorite a report
• View the personal list of favorites

To perform the following tasks, you are re-directed to the legacy Unified Intelligence Center reporting page.

• Schedule reports to run at selected intervals
• Import Reports
• Create and view
  • Report Definition
  • Data Source
For performing the following tasks, you must access the legacy interface. To access the legacy interface, click on any of the above listed drawers from the new interface:

- Export reports, report folders
- Create and edit Chart Views
- Create and edit Gauge Views

In release 11.5, the new reporting page is designed for supervisors and agents use only.

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.

Permalinks work in both HTTP and HTTPS.

Default Locale in Unified Intelligence Center

The logon page will be displayed in browser locale. Users can change the locale in the top navigation bar under the login user gadget.
The user can select a locale and it will be retained in the browser even after the user logs out and login back to CUIC with the same browser.

---

**Figure 1: CUIC Application Locale**

---

**Internet Explorer 11 Browser Support**

Unified Intelligence Center supports Internet Explorer 11. Firefox 45 ESR & higher ESR & Chrome 48+.

---

**Internet Explorer Settings**

When using Internet Explorer,

- To manage Dashboards (create, update, and delete) and the associated widgets, enable the Compatibility View settings for your site.

- To run a report from a Dashboard, perform the following settings:
  - Disable Compatibility View settings for your site (Run the Unified Intelligence Center application in Native mode).
• Select the "Don't show filter while executing a report" check box for that report (Reports > Manage Filters).

• To run the report permalink from a Dashboard, disable the Compatibility View settings for your site.
Report Management

- Overview, page 5
- Report Manager, page 6
- Report Viewer, page 8
- Run a Report, page 8
- Historical and Real-Time Reports, page 8
- Live Data Reports, page 8
- Stock Reports, page 9
- Create or Edit Reports, page 9
- Import Reports, page 10
- Add Template Help, page 11
- Export Reports, Report Definitions, and Folders, page 12
- Available Views, page 13
- Create a Grid View, page 14
- Create a Gauge View, page 15
- Create a Chart View, page 16
- Grouping, page 18

Overview

Cisco Unified Intelligence Center is a reporting platform for users of Cisco Contact Center products. As a reporting user, you can use Unified Intelligence Center to perform these tasks:

- Create and view reports
- Filter data in a report
- Schedule reports to run at selected intervals
• View permalinks for reports

The URL for logging in to the Unified Intelligence Center reporting application is https://<HOST>, where HOST is the DNS name or IP address of a Unified Intelligence Center node.

Unified Intelligence Center does not support HTTP by default. You can enable HTTP support by setting the http-enabled property to on from the command-line interface.

Unified Intelligence Center loads the login page with HTTPS, and after successful login, Unified Intelligence Center loads the main page with HTTP. When http-enabled is off, Unified Intelligence Center redirects all HTTP requests to HTTPS.

Permalinks work in both HTTP and HTTPS.

Report Manager

Use the Unified Intelligence Center Report Manager to view the location of reports and the hierarchy of the folders where the reports reside. You can do the following:

• Create new folders and subfolders (called categories and subcategories in the user interface) to organize your reports.
• Export an entire folder along with all the reports in it.

Table 1: Report Manager Tasks

<table>
<thead>
<tr>
<th>Action</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Report-level actions</strong></td>
<td></td>
</tr>
<tr>
<td>Run</td>
<td>Runs a report.</td>
</tr>
<tr>
<td>Schedule</td>
<td>Directs you to the Report Scheduler page so that you can schedule the report to run at a later time or at regular intervals (Create a Schedule for a Report, on page 28).</td>
</tr>
<tr>
<td>Edit</td>
<td>Displays the Report Editor.</td>
</tr>
<tr>
<td>Save As</td>
<td>Saves a copy of the report with a different name.</td>
</tr>
</tbody>
</table>

**Note**

The reporting users do not have permission by default to create a subcategory under the Reports category in Cisco Unified Intelligence Center. Contact your administrator to get permissions.

**Note**

When you save a report, the report description should not contain the following special characters: parentheses (()), angle bracket (>), forward slash (/), question mark (?) and any executable scripts such as JavaScript. The text also should not start with a quote (" or ').
<table>
<thead>
<tr>
<th>Action</th>
<th>Description</th>
<th>Note</th>
</tr>
</thead>
<tbody>
<tr>
<td>Edit Views</td>
<td>Displays the available views. You can either create a new view or edit existing views.</td>
<td>You can create or edit views only if you have write permission.</td>
</tr>
<tr>
<td>Export</td>
<td>Exports a report, including online help and localization files, to your computer. This can be useful when you need to import the report into another Unified Intelligence Center System, for example, from a Lab to a Production system.</td>
<td>A Report Designer with write permission can export a custom report.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>If you export a folder, all of the reports in the folder are exported.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>You cannot export stock reports.</td>
</tr>
<tr>
<td>Delete</td>
<td>Deletes a folder or a report.</td>
<td>You cannot delete a stock folder or a stock report.</td>
</tr>
<tr>
<td>Subcategory-level actions</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Create Sub-category</td>
<td>Creates a subfolder.</td>
<td>Applies to a root-level folder as well.</td>
</tr>
<tr>
<td>Delete</td>
<td>Deletes a folder or a report.</td>
<td>You cannot delete a stock folder or a stock report.</td>
</tr>
<tr>
<td>Rename</td>
<td>Renames a folder or a report.</td>
<td>You cannot rename a stock folder or a stock report.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Applies to a root-level folder as well.</td>
</tr>
<tr>
<td>Create Report</td>
<td>Creates a new report in the selected folder.</td>
<td>Applies to a root-level folder as well.</td>
</tr>
<tr>
<td>Permissions</td>
<td>Sets execute and write permission for the folder.</td>
<td></td>
</tr>
<tr>
<td>Export</td>
<td>Exports a folder or a report to your computer.</td>
<td>If you export a folder, all of the reports in the folder are exported.</td>
</tr>
<tr>
<td>Action</td>
<td>Description</td>
<td></td>
</tr>
<tr>
<td>-----------------</td>
<td>--------------------------------------------------------------------------------------------------------</td>
<td></td>
</tr>
<tr>
<td>Import Report</td>
<td>Imports an existing Unified Intelligence Center report and stores it on this instance of Unified Intelligence Center. Note: Applies to all folder levels (root, subcategory, and report).</td>
<td></td>
</tr>
<tr>
<td>Refresh</td>
<td>Refreshes the Report Manager. Note: Applies to all folder levels (root, subcategory, and report).</td>
<td></td>
</tr>
</tbody>
</table>

**Report Viewer**

When you run a report, it is displayed in the Report Viewer. The content varies, based on which view (data presentation) of a report is selected—a grid, a chart, or a gauge. You can change the report view on this page. There are two types of reports: Historical and Real-time reports (SQL based reports) and Live Data reports.

**Run a Report**

In the Report tab, the user can run the desired reports by clicking on the Report Name. The Report will be displayed in a new tab.

*Note*

The filter dialog displays when a report is executed unless the report designer selects the ‘Don’t show filter when executing report’ option in the report editor page.

**Historical and Real-Time Reports**

Unified Intelligence Center Historical Reports allow you to do the following:

- 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.

- Modifying Reports

**Live Data Reports**

While executing Unified Intelligence Center Live Data reports you can do the following:
• View multiple grid views of the same report. Also, you can resize the column size.

Note  Live Data reports support only the grid view.

• Add or remove columns to the grid view using the gear icon.

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.

Stock Reports

Cisco provides new stock reports from time to time to be used as templates for new functionality. These reports can be downloaded from Cisco.com.

All the reports reside in the Reports drawer on the left pane.

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

Create or Edit 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  Reporting users do not have permission by default to create a subcategory under Reports. An Administrator should create a subcategory and grant access.

The following steps describe how to create a new report or edit an existing report.

Procedure

Step 1  Click the Reports tab in the left pane.

Step 2  Navigate to the folder where you want to create the report.
To create a subfolder, navigate to the appropriate folder, from the tool bar, click New > Folder.

Step 3  From the Reports toolbar, click New > Report.

Note  To edit an existing report, navigate to the report, click the ellipsis icon beside the report and select Edit.

Step 4  In the New Report Wizard > Basic Information section, enter/select the report details and click Next.
The name of the report should be unique to Unified Intelligence Center. Use the arrows to select the appropriate Report Definition.

**Step 5** In the Manage Views and Thresholds tab, create Report Views and Thresholds and click Next.

**Step 6** In the Manage Filters tab, create report filters and click Finish. For more information, see Filter Data in a Report.

To configure a help page for a report, see Add Template Help.

The newly created report is listed in the Reports tab.

---

**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 2: 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
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.

**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 HTML or 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 either an HTML or a ZIP file.
Step 4 After uploading the file, click Save.
Note When you run the report, click the Online help icon on the Reports toolbar to view the configured help file.

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.

• While exporting report definitions or 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 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.

---

**Available Views**

Available Views displays when you right-click a report and select **Edit Views**. It lists the available views and corresponding descriptions that are currently associated with a report and allows you to create new views or edit existing views.

Cisco Unified Intelligence Center support three view types:

• Grids
• Charts
• Gauges
If you delete a view, the permalink that was created for that view, including all the variable parameters that were created using the filter, are also deleted. Cisco Unified Intelligence Center returns the permalink execution error “This Report was deleted. Please Close/Cancel this page.”

You can perform the following actions on the Views Editor page:

- **Create** or **Edit**: Chart and Gauge

**Note**
For creating and editing Chart view and Gauge view, you must access the legacy interface. You can access the legacy interface using the following drawers:

- Dashboards
- Report Definitions
- Users
- Configure; DataSources, ValueLists, Scheduler

- **Delete**—Asks for confirmation and then deletes the view. Do not delete all report views. You cannot run a report that has no views.
- **Refresh**—Updates the page to show changes other users have made to the views for this report dataset.
- **Links**—Check the Enable Unauthenticated Access check box to allow users who have the permalink to access the reports in the unauthenticated mode. By default, the Enable Unauthenticated Access check box is not checked.

To retrieve the permalink to a report, see *View Report Permalinks*.

- **Help**—Opens online help for the page.

## 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.

Grid View can be created while creating or editing a report.

### Procedure

**Step 1**  
In the **Reports** page, click on **New** and select **Report** from the drop-down. **Basic Information** wizard is displayed.

**Step 2**  
Fill in the details in **Basic Information** wizard and click **Next**.

**Step 3**  
**Manage Views and Thresholds** wizard is displayed.
A default view is already created. To create additional views, click on Create New and select Grid Views. New Grid View wizard is displayed.

**Step 4** Enter the Name and Description in the respective fields.

**Step 5** From the Font selection box, select the font size from the drop-down.

**Step 6** Choose the fields from Available and move it to the Selected field list.

**Step 7** In the Header column click on + or - icons to add or delete a header. In the Selected Values edit icon allows the user to edit the fields and header properties.

**Step 8** Edit the values as required and click Save.

**Step 9** Your are re-directed back to Report Views tab. Click Finish.

---

**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 do 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.

---

**Note** For creating and editing Gauge view, you must access the legacy interface. You can access the legacy interface using the following drawers:

- Dashboards
- Report Definitions
- Users
- Configure; DataSources, ValueLists, Scheduler

The steps below describe how to create a Gauge View. For illustration, the Report Definitions drawer is used as the navigation to the legacy interface:

**Procedure**

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

**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.

---

**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 do not support Chart view.
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.

Note

For creating and editing Chart view, you must access the legacy interface. You can access the legacy interface using the following drawers:

- Dashboards
- Report Definitions
- Users
- Configure; DataSources, ValueLists, Scheduler

The steps below describe how to create a Chart View. For illustration, the Report Definitions drawer is used as the navigation to the legacy interface:

**Procedure**

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

**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

For an executed report, use the Group By option to add/remove/update grouping configurations for the current view. CUIC grid reports support up to three levels of grouping.

If you are grouping the column with Date/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, follow these 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.
CUIC 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.

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.

**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.
Chapter 3

Filter Data in a Report

- Filters in a Report, page 21
- Types of Filters, page 21
- Configure a Date and Time Range Filter, page 22
- Configure Key Criteria Field, page 23
- Configure Field Filters, page 23
- Configure Unified Intelligence Center Live Data Gadgets in Cisco Finesse Desktop with compositeFilterId, page 25

Filters in a Report

Report filters in Unified Intelligence Center are used to present selective data. Use the Filter page to define the filter and 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 refine the default filter values during the report creation.

  ![Note]

  You do not see the filter page if the report designer has selected Don't show filter when executing report filter on the Reports page. For more information about filters, see the Cisco Unified Intelligence Center Report Customization Guide available here: http://www.cisco.com/c/en/us/support/customer-collaboration/unified-intelligence-center/products-user-guide-list.html

- After the report is generated: You can refine the filter values by clicking on the filter icon.

Types of Filters

Cisco Unified Intelligence Center has the following types of Filters:
Configure a Date and Time Range Filter

To configure a Date Range Filter while executing a report, follow the steps below:

Procedure

Step 1  Click on an existing Report to view the Filter page.

Step 2  Date Range filter wizard is displayed.

- 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.

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

**Table 2: Filter tabs**

<table>
<thead>
<tr>
<th>Report Definition Query Type</th>
<th>Applicable Filter Tabs</th>
</tr>
</thead>
<tbody>
<tr>
<td>Database Query</td>
<td>Date &amp; Time, Key Criteria, Field Filters</td>
</tr>
<tr>
<td>Live Data or Real Time Streaming</td>
<td>Key Criteria, Field Filters</td>
</tr>
<tr>
<td>Anonymous Block</td>
<td>Parameters</td>
</tr>
<tr>
<td>Stored Procedure</td>
<td>Parameters</td>
</tr>
</tbody>
</table>


The below sections will provide steps to configure and select value list for filters while executing a report, you can configure/select the filters if "Don't show filter while executing reports", is unchecked while creating a new report.
The option to select certain days of the week will be available only if the time interval spans more than a day.

This option is not available for reports that are based on the query type Anonymous Block. For more information, refer to Cisco Unified Intelligence Center Report Customization Guide at http://www.cisco.com/c/en/us/support/customer-collaboration/unified-intelligence-center/products-user-guide-list.html

**Configure Key Criteria Field**

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

**Procedure**

**Step 1**
Click an existing report to view the **Filter** page.

**Step 2**
Choose the collection or values from the **Available** field.

**Tip**
Search for a value or collection using the **Search** field.

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

**Step 3**
Select an item from the **Available** list and move it to the **Selected** list.

**Step 4**
You can repeat the search and add to the list of selected items. You can also select multiple collections or values.

**Step 5**
Click **Next**.

**Configure Field Filters**

You can use the **Field Filters** tab to filter any field in the report. Based on the field type (date, numeric or string), different operators are available. For example, you can filter calls in queue for greater than 2 minutes or on all agents in the hold state to filter out the less important information.
Configure Field Filters

**Note**
- You can use Field filters in reports based on SQL Query only.
- Field filters can be used to filter a plain text or a decimal field based on field type.

**Procedure**

**Step 1** Run an existing report, and click on the report to view the filter page.
Choose Filter tab is displayed.

**Step 2** Select the *Date and Time* range from the filter. Click *Next*.
Key Criteria tab is displayed.

**Step 3** Select an item form **Available list** and move it to the **Selected list** and click *Next*.
Field Filters tab is displayed

**Step 4** Select **Filter according to the following criteria**.
Filter criteria depend on the field type (Date, Decimal, Value List, String, or Boolean).

  - 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**, to specify any value or to select an Operator from Equal To, Not Equal To, Less Than, Less Than or Equal To, or Greater Than and then entering a value; for example, Operator = Greater Than and Value = 16.5.

  - For **String**, to specify any value or to filter by selecting 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.

  - For **Boolean**, to specify any value or to filter by selecting an Operator and then selecting True or False.

  - If the individual filter field is a **Value List**, to specify any value or to filter by moving one, all, or some items in the list to the Selected column.

**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**.
Configure Unified Intelligence Center Live Data Gadgets in Cisco Finesse Desktop 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 mrdDomainID 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.
- **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.)
Filter Data in a Report

Configure Unified Intelligence Center Live Data Gadgets in Cisco Finesse Desktop with compositeFilterId
Schedule Report

- Schedule a Report, page 27
- Daylight Saving Time and Scheduled Reports, page 28
- Create a Schedule for a Report, page 28
- Configure a Scheduled Report to Be Sent by Email, page 29
- Configure a Report To Save to Remote Location, page 31

Schedule a Report

You can automate the generation of reports on a regular and recurring basis by setting up a schedule. The Scheduler 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 Scheduler drawer. System Configuration Administrators can perform all scheduler functions on any reports. They can read, 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 Execute permissions.

Note

To perform any action on Configure > Scheduler, you will be redirected to legacy interface.
You cannot schedule Live Data reports.

**Figure 3: The Report Scheduler**

You can schedule reports in any of the following ways:

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

**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.

**Create a Schedule for a Report**

You can schedule reports to run automatically within a dashboard. For example, an interval report can be run every 30 minutes to capture a day's activity up to the prior interval.
Procedure

Step 1 In the Scheduler, click Create.

Step 2 In the General Settings tab, enter a Schedule Name for the scheduled report.

Step 3 In the Report area, select Reports and then select a report.

Step 4 Check the Set Filter check box to configure the filters. To use the default filter, do not check the check box. You cannot schedule a report that does not have a filter.

Step 5 Click the Set filtering criteria link to go to the filter configuration page.

Note See Filter Types for more information.

Step 6 In the Duration section, click the calendar icon to select the Start Date and check No End Date, or use the calendar icon to End Date.

Step 7 In the Recurrence Pattern section, specify the frequency of the scheduled report. Choose from one of the following options:

• 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.

Note Use Last to specify the last day of the month.

In the Frequency section, specify the number of times the report should run on the scheduled days.

Note The maximum frequency with which you can schedule a report is once every five minutes.

Step 8 Click Save.

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

Configure a Scheduled Report to Be Sent by Email

In the Scheduler, click the Email tab to set up a schedule to email a scheduled report.

Before You Begin

Procedure

Step 1  In the Email Distribution field, click Add, and enter the recipient email address.
  Tip  Repeat Step 1 to add multiple recipients.
  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.

Step 2  Using the Email View drop-down menu, select the view of the report that you want to email.
  Note  Only grid views can be scheduled.

Step 3  In the Email Subject field, enter text for the subject line.

Step 4  Using the File Type drop-down menu, select the type of file. Choose one of the following:

- **INLINE HTML**—Sends the report in HTML format.
  * 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.
  * 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.
  PDF attachments have the following limitations:
  * The generated PDF has either landscape or portrait orientation. Landscape orientation is the default setting.
  * The generated PDF uses standard font sizes: 10 pixels for landscape orientation and 8 pixels for portrait orientation. The PDF bypasses the font size that is set in grid view editor to keep the font output printer-friendly.
  **Note**  PDF supports images only in the HTTP format.
  * The generated PDF retains rows that fit within the page for the selected orientation. Columns that do not fit within 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.
  * The generated PDF 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. However, note that this might reduce the number of columns shown in the PDF.

Step 5  Click Save.
Every time you edit a scheduled report and click **Save**, scheduler runs and sends the scheduled report by email to all the recipients that are configured in the **Email Distribution** field.

---

**Configure a Report To Save to Remote Location**

In the scheduler, click the **Save to Remote Location** tab, to save report in CSV format.

**Procedure**

**Step 1** In the **Protocol** drop-down list, select **SFTP** to establish secure connection to the remote location.

**Step 2** In the **Report View** drop-down list, select the view of the report to be posted.

**Step 3** In the **Host** field, enter the IP address of the remote location.

**Step 4** Enter a **Port** number for the SFTP.

*Note* The default port number is 22.

**Step 5** Enter a **Username** for the host.

**Step 6** Enter a **Password** for the host.

**Step 7** In the **Directory Path** field, enter the location on the host to save your .csv file.

*Note* Directory Path should be an absolute path.

**Step 8** Click **Save**.

---

**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.
Dashboards

- Dashboard Overview, page 33
- Dashboard Manager, page 34
- View a Dashboard, page 34
- Create a Dashboard, page 34
- Add an Item to Dashboard, page 35
- Run a Slideshow, page 36
- View Dashboard Permalink, page 37

Dashboard Overview

Dashboard is a web page displaying reports, scheduled reports, sticky notes, and web-based elements, such as URLs and web widgets, which are relevant to specific workflows and responsibilities.

Note

To perform any action on Dashboard, you will be redirected to UI prior to 11.5

Click the Dashboards drawer in the left panel to open the Available Dashboards page. (Only users with the Dashboard Designer user role can open the Dashboards drawer.) The dashboards you see when you open the Dashboards drawer are created dashboards that you and others created. You can see the dashboards created by others because they have given you permission to view.

Note

- All dashboards must be created by a Dashboard Designer.
- Unified Intelligence Center is not installed with a default dashboard.
- All actions on the Dashboards interface are based on user role and on the user's object permissions for dashboards and for categories.
Dashboard Manager

Dashboard is a unique feature of Unified Intelligence Center, which lets you display multiple objects like a web page, some widgets, and some reports in a consolidated view.

View a Dashboard

To view a dashboard, click a dashboard or right-click a dashboard and select View.

Note

If you have Execute permissions, you can view a dashboard, based on your permission for the dashboard's category. Also, if you cannot view the category then you cannot locate the dashboard, even if you have Execute or Write permission for the dashboard.

Procedure

Step 1 Click Add to add items to the dashboard. By default, the new dashboard is empty.

Note A Dashboard Designer user without Write permissions can add items to a dashboard but cannot save the added items.

Step 2 Click Auto Refresh to refresh data in real time. By default, Auto Refresh is checked.

Step 3 Click Refresh to refresh the data in the system window. This refresh does not change the state of the Auto Refresh check box.

Step 4 Select Slideshow to view the dashboard items as a slideshow. This is disabled until you have added items to the dashboard.

Step 5 Click Pop Out to Open the dashboardpermalinkinanewbrowser.

Step 6 Click Help to open the help page for dashboard.

Step 7 Click Save.

Create a Dashboard

Follow these steps to create a dashboard.

Procedure

Step 1 Click the Dashboard tab.

Step 2 On the Dashboard tab, right-click the folder where you want to place the dashboard, and select Create Dashboard.

Step 3 Name the dashboard in the Create Dashboard window.

Step 4 Assign permissions to users, and click OK.
Add an Item to Dashboard

You can add the following items to a dashboard:

- Report: Display an existing report on the dashboard.
- Schedule: Display a scheduled report on the dashboard.
- URL: Display a web page on the dashboard.
- Sticky Note: Add sticky notes to the dashboard.
- Custom Widgets: Add custom widgets to the dashboard.

Figure 4: Widgets on the Dashboard

Follow these steps to add items to the Dashboard.

Procedure

**Step 1**
Click Dashboards drawer.

**Step 2**
Click the dashboard that you want to add items to.

**Note**
You can also create a dashboard and add items to it. See Create a Dashboard.
Step 3 On the dashboard, click Add.

Step 4 In the Title box, enter the name of the item.

Step 5 From the Type drop-down list, select the type of item that you want to add.

Step 6 In the Size section, define the width and height of the item in pixels.

Step 7 In the Position section, define how far the item will be placed from the left side and from the top of the dashboard.

Step 8 In the Dashboard Item Content section, define the dashboard item that you selected in Step 5.

To display a report:

a) Click the arrows to navigate through the folders to the report that you want to display on the dashboard.

b) Select the Report and Available Views.

c) Click OK.

To display a scheduled report:

a) Select the schedule from the Schedule box.

   Note You can search for the schedule using the Search schedule box.

b) Click OK.

To display a URL:

a) In the URL box, enter the address of the web page that you want to display on the dashboard.

b) Click OK.

To display a custom widget:

a) In the Content box, enter Java code of the widget that you want to show on the dashboard.

b) Click OK.

To display a Sticky Note:

a) In the Content box, enter content for the sticky note.

b) Click OK.

---

Note You cannot configure HTTP based widget URL's in Dashboard, when Unified Intelligence Center is in the HTTPS mode.

---

Run a Slideshow

Use the Slideshow feature to view the dashboard items that you added in a new window.

Follow these steps to use the slideshow feature:

Procedure

Step 1 Click Slideshow in the toolbar. This opens the slideshow in a new window.

Note If a dashboard has only one item, you can run a slideshow, but you will not notice a change.
Step 2  Perform the following actions to start, stop, pause, and set interval for the slideshow.

- **Play**—Starts the slideshow.
- **Pause**—Temporarily pauses the slideshow.
- **Stop**—Stops the slideshow and returns to the dashboard.
- **Set Interval**—Opens a dialog box where you can set the interval for the slideshow.

  **Note**  The minimum interval is 1 and the maximum is 900 seconds.

---

### View Dashboard Permalink

The permanent hyperlink can be accessed only from a web browser. It cannot be accessed by an application like Microsoft Excel to pull data or display a dashboard.

To retrieve the permanent hyperlink to a dashboard, follow the steps below.

**Before You Begin**

The permanent hyperlink to a dashboard is created when you create the dashboard.

**Procedure**

**Step 1**  Click the **Dashboards** tab in the left pane.

**Step 2**  Navigate to the particular dashboard.

**Step 3**  Right-click the **Dashboard**, and select **Html Link**.

**Step 4**  Copy the **Html Link**. This is the permanent hyperlink to the dashboard.

  **Note**  Check the **Enable Unauthenticated Access** checkbox, if you want the hyperlink to be accessible without authentication.

  **Note**  The hyperlink requires authentication the first time you access it, regardless of, the checkbox, checked or not.

  **Note**  For dashboards that contain Live Data report, the check box for **Enable Unauthenticated Access** should not be selected.

**Step 5**  Click **OK**.
Permalinks

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.

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

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

**Note** Dashboard permalink can be accessed only from a web browser. It cannot be accessed by an application like Microsoft Excel to pull data or display a dashboard.

The permalink to a dashboard is created when you create the dashboard. To retrieve the permalink to a dashboard, follow these steps:

**Procedure**

1. **Step 1** Click the **Dashboards** in the left pane.
2. **Step 2** Navigate to a dashboard.
3. **Step 3** Right-click the dashboard, and select **Html Link**.
4. **Step 4** Copy the **Html Link**. This is the permalink to the dashboard.
   - **Note** Check the **Enable Unauthenticated Access** check box if you want the permalink to be accessible without authentication.
   - **Note** Permalinks will work in the unauthenticated mode when the **Enable Unauthenticated Access** check box is checked.
   - **Note** For dashboards that contain Live Data report, the check box for **Enable Unauthenticated Access** should not be selected.
5. **Step 5** Click **OK**.

Permalink to a Report

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

To view the Report permalink, perform the following steps:

**Procedure**

1. **Step 1** From the left navigation pane, click **Reports**.
2. **Step 2** Click the ellipsis icon beside the required Report and click **Permalinks**.
3. **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** For Live Data reports, the **Authenticate** check box is disabled. Make sure to enable it as all Live Data report permalinks require authentication.
   - For Excel permalink, the browser prompts you to download and save the file (Excel format) to the local drive.
Step 4  Copy and paste the permalink (HTML and XML) in any browser to view the Report.

Step 5  Click Save.
View Help

Two types of help are available for a report in Cisco Unified Intelligence Center.

- Application-specific help: This help content explains how to use Unified Intelligence Center in general.
- Report-specific help: This help content explains how to use the report itself. 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. To know more about how to attach help to a report, see Configure Online Help for a Report in Cisco Unified Intelligence Center Report Customization Guide available here: http://www.cisco.com/c/en/us/support/customer-collaboration/unified-intelligence-center/tsd-products-support-series-home.html.

Get Help on Cisco Unified Intelligence Center

To get help on Cisco Unified Intelligence Center, click on the Online Help button on the homepage. The help content related to the tab displays in a separate browser window.

Get Help on a Report

To get help on a report, follow these steps.
Procedure

Step 1  In the Reports page, click on a Report to execute it. See Run a Report, on page 8.
Step 2  When the report is executed, click on Online Help icon in the report toolbar.
Step 3  The report template help will be displayed in a new browser window.
Gadget Toolbar

Gadget Toolbar Improvements

Cisco Unified Intelligence Center provides you with a toolbar on Live Data reporting gadget on the Cisco Finesse Desktop. The following figure shows an example of a gadget toolbar:

![Figure 5: Gadget Toolbar](image)

**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. The list is displayed in **Report name - View name** format. When you select a report from the list it is displayed in bold. 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/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 on 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/play button displayed on the toolbar. As a reporting user, the pause/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/play button.

---

**Show Threshold Only**

When **Show Thresholds Only** check box is checked, 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.
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
- 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 are not 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.