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Change History

<table>
<thead>
<tr>
<th>Change</th>
<th>See</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Initial Release for Release 11.6(1)</td>
<td></td>
<td>August 2017</td>
</tr>
<tr>
<td>Changed topics under chapter Dashboards</td>
<td>Dashboards</td>
<td></td>
</tr>
<tr>
<td>Changed topics under chapter Reports</td>
<td>Reports</td>
<td></td>
</tr>
<tr>
<td>Changed topics under chapter Permalinks</td>
<td>Permalinks</td>
<td></td>
</tr>
<tr>
<td>Changed topics under chapter Gadget Toolbar</td>
<td>Gadget Toolbar Improvements</td>
<td></td>
</tr>
</tbody>
</table>

About This Guide

This guide explains the following functionality of the Cisco Unified Intelligence Center reporting application.

- Dashboards
- Reports
- Permalinks
- Schedule Reports
- View Help
• Gadget Toolbar
• Live Data Failover

Audience

This guide is intended for Cisco Unified Intelligence Center users to manage dashboards, manage reports, filter report data, run reports, schedule a report, retrieve permalinks and more.

Related Documents

• Cisco Unified Intelligence Center Guides at

• Cisco Unified Intelligence Center Developers' Forum at
  https://developer.cisco.com/site/reporting/overview/

Obtaining Documentation and Submitting a Service Request

For information on the following, see What's New in Cisco Product Documentation at https://www.cisco.com/c/en/us/td/docs/general/whatsnew/whatsnew.html:

• Obtaining documentation
• Using the Cisco Bug Search Tool (BST)
• Submitting a service request
• Gathering additional information

To receive new and revised Cisco technical content, subscribe to the What's New in Cisco Product Documentation RSS feed at https://www.cisco.com/assets/cdc_content_elements/rss/whats_new/whatsnew_rss_feed.xml. RSS feeds are a free service.

Documentation Feedback

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We appreciate your comments.
Overview

Cisco Unified Intelligence Center is a reporting platform for users of Cisco Contact Center products. It is a web-based application that provides Historical, Real-time, and Live Data reporting and dashboards.

Unified Intelligence Center serves the following primary purposes:

- Obtains data from the base solution's database. The base solution can be any of the Contact Center products.
- Allows you to create custom queries to obtain specific data.
- Customizes the visual presentation of the reports.
- Customizes the data presented in the reports.
- Allows different groups of people to view specific data based on their roles.

As a reporting user, you can use the new Unified Intelligence Center page to perform the following tasks:

- Create, edit, and manage Dashboards.
- Create, edit, run, and manage Reports.
- Filter data in a report.
- View permalink for Dashboards and Reports.
- Set sharing permissions for Dashboards and Reports.
- Select locale for the Unified Intelligence Center.
- Search for Dashboard and Report.
- Mark Dashboards and Reports as favorites.
- View the personal list of favorites for Dashboards and Reports.
To perform the following tasks, you are re-directed to the Cisco Unified Intelligence Center legacy interface.

- Schedule reports to run at selected intervals.
- Creating and viewing:
  - Report Definition
  - Data Source
  - Value List and Collections
  - Users and Permissions (Security)

Note: You can export reports or report folders only from the legacy interface. To access the legacy interface, click any of these drawers from the new interface.

Access Unified Intelligence Center

The URLs for logging into 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.

Note: Permalinks work in both HTTP and HTTPS.

Default Locale in Unified Intelligence Center

Note: To specify a locale, install the language pack.
First time access to Cisco Unified Intelligence Center displays the sign in page in the browser locale. To change the locale, click the username on the top-right corner of your screen and select the required locale from the drop-down list.

When you select a locale, the browser retains the locale information even after you sign out and sign in back to Cisco Unified Intelligence Center within the same browser.

---

**Note**

When you access both the Unified Intelligence Center interfaces (new and legacy) simultaneously, the legacy interface reflects the current locale. However, when you change the locale from the new interface, the legacy interface needs a browser refresh to reflect the changed locale.

- For Windows, press **Fn+F5**
- For Mac, press **command+R**

---

**Table 1: Supported Languages**

<table>
<thead>
<tr>
<th>Brazilian Portuguese</th>
<th>Chinese (Simplified)</th>
<th>Chinese (Traditional)</th>
<th>Danish</th>
<th>Dutch</th>
</tr>
</thead>
<tbody>
<tr>
<td>English (U.S.)</td>
<td>French (France)</td>
<td>German</td>
<td>Italian</td>
<td>Japanese</td>
</tr>
<tr>
<td>Korean</td>
<td>Russian</td>
<td>Spanish (Spain)</td>
<td>Swedish</td>
<td>Polish</td>
</tr>
<tr>
<td>Turkish</td>
<td>Finnish</td>
<td>Norwegian</td>
<td>Čeština (Czech)</td>
<td>Bulgarian</td>
</tr>
<tr>
<td>Català (Catalan)</td>
<td>Hrvatski (Croatian)</td>
<td>Magyar (Hungarian)</td>
<td>Slovenčina (Slovak)</td>
<td>slovenščina (Slovenian)</td>
</tr>
<tr>
<td>Српски (Serbian)</td>
<td>Română (Romanian)</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

---

**Browser Support**

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

---

**Note**

To access Datasource, Report Definition, Security, User Management, and OAMP, Internet Explorer 11 compatibility mode is required. Chrome support is only for the new user interface.

---

**Screen Resolution Support**

Supported screen resolution for Cisco Unified Intelligence Center: 1366 x 768 or higher.
Overview

In Cisco Unified Intelligence Center, Dashboard is an interface that allows you to add reports, web pages (URLs), web widgets, and notes in a consolidated view.

All actions on the Dashboards interface are based on your role and on the user permissions for Dashboards and for Folders.

Access Dashboards

From the left navigation pane, click **Dashboards** to access the list of all the available Dashboards. This list includes the dashboards that you have created and the dashboards created by other users on which you have EXECUTE permissions.

Note

- You must be assigned with the **Dashboard Designer** role to create Dashboards.
- To view Dashboards created by other users, you must have **EXECUTE** permissions for the dashboard and its parent folder.
- Cisco Unified Intelligence Center does not provide a default Dashboard.

Run Dashboards

To run a Dashboard, click the Dashboard name. When the Dashboard is in the run mode, use the toolbar to:

- Edit the Dashboard.
- Refresh the Dashboard data.
- Maximize the Dashboard view.
Press Esc to restore the original view.

**Before You Upgrade**

Cisco Unified Intelligence Center 11.6 supports a maximum of ten widgets per Dashboard. Hence, for Dashboards with more than ten widgets in versions before 11.6, ensure to split those Dashboards with a maximum of ten widgets each before upgrade.

Consider a Dashboard with 15 widgets in Unified Intelligence Center versions before 11.6. Before upgrading to version 11.6, use the **Save As** feature to clone the Dashboard and manage the widgets up to ten per Dashboard.

**Unsupported Widgets**

The Cisco Unified Intelligence Center 11.6 interface for Dashboards does not support the following widgets:

- Schedule Report widgets
- URL widgets containing Dashboard permalinks (Nested Dashboards)

**Migration Limitations**

The following widgets if added to the Dashboard before Cisco Unified Intelligence Center 11.6 are not migrated.

- Schedule Report widgets.
- URL widgets containing Dashboard permalinks (Nested Dashboards).
- Widgets that were placed beyond the new Dashboard canvas size.

---

**Note**

Post upgrade to Cisco Unified Intelligence Center 11.6, the positions of the widgets placed in the legacy dashboard interface are retained. However, in few cases the position and size of the widgets are modified to fit inside the new dashboard interface.

- Inaccurate widgets (inaccurate database records)
  

---

**Note**

For the Schedule Report widgets and Nested Dashboard widgets that are not migrated, the Cisco Unified Intelligence Center server logs do not capture the logs.

For all other widgets, Cisco Unified Intelligence Center server logs captures the log information with the corresponding Dashboard and widget name.
Dashboard Actions

The following table lists various actions that you can perform from the Dashboard.

Table 2: Dashboard Actions

<table>
<thead>
<tr>
<th>Action</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Dashboard-level actions</strong></td>
<td></td>
</tr>
</tbody>
</table>
| New Dashboard | Creates a new Dashboard. The **New Dashboard** wizard allows you to:  
  • Provide Dashboard properties; Name and Description.  
  • Add widgets to the Dashboard.  
  For more information, see *Add Widgets to Dashboard*. |
| Dashboard Folder  | Creates a new Folder. Use this feature to categorize Dashboards.  
  **Note** When you move or save the folders to a different location, the drop-down lists all the folders. You can only navigate into the folders on which you have the WRITE permission. |
| **Toolbar actions**                        |
| Refresh       | Refreshes the Dashboards page. |
| Favorites      | To easily access your Dashboards, you can tag Dashboards as Favorites.  
  Click the star icon beside the Dashboard name to add to Favorites. |
| Search         | Searches for a particular Dashboard. |
| **Ellipsis (…) actions**           |
| Edit           | Edits the Dashboard details. In the edit mode, you can:  
  • Add, remove, and modify widgets.  
  • Click the icon next to the Dashboard name to edit the Dashboard properties; name and description.  
  After editing the Dashboard, click **Save**. |
| Save As        | Saves a copy of the Dashboard. |
| Rename         | Renames a Dashboard or a Folder. |
| Move           | Moves Dashboard or Folder from one folder to another. |
### Add Widgets to Dashboard

You can add Reports, Web pages, Notes, and Custom Widgets to a Dashboard. In addition, you can resize and reposition the widgets to suit your needs. The default widget size depends on the available space on the Dashboard canvas.

**Note**

You can add a maximum of ten widgets per Dashboard.

To add widgets to the Dashboard, perform the following steps:

#### Procedure

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

**Step 2** In the **Dashboards** tab,

- To add widgets to a new Dashboard, click **New > Dashboard**.
- To add widgets to an existing Dashboard, click the ellipsis icon beside the required Dashboard and click **Edit**.

**Step 3** On the Dashboard canvas, click on the plus icon.

**Step 4** In the **Add Widgets** dialog box, add the required widgets:
<table>
<thead>
<tr>
<th>Widget Type</th>
<th>Steps</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>1. Click the Report View icon.</td>
</tr>
<tr>
<td></td>
<td>2. In the Add Report View dialog box, select the Report and the Views from the corresponding drop-down list.</td>
</tr>
<tr>
<td></td>
<td>3. Click Done.</td>
</tr>
<tr>
<td></td>
<td><strong>Note</strong></td>
</tr>
<tr>
<td></td>
<td>• For a Report widget, you can click the icons on the widget header to view the existing filter information, manage filters, and play or pause the report execution.</td>
</tr>
<tr>
<td></td>
<td>• The Manage filters and the View filter information icons appear only when you hover on the report widget.</td>
</tr>
<tr>
<td></td>
<td>• For Grid view reports, you can increase or decrease the font size of the report data.</td>
</tr>
<tr>
<td></td>
<td>The default font size is set to 10. Post upgrade to Cisco Unified Intelligence Center 11.6, this setting overrides the font size set during the grid view creation.</td>
</tr>
<tr>
<td></td>
<td>• In the edit mode, from the Report widget header, use the ellipsis icon to access Filter and modify the filter criteria.</td>
</tr>
<tr>
<td>Note</td>
<td>Adds notes to the Dashboard.</td>
</tr>
<tr>
<td></td>
<td>1. Click the Note icon.</td>
</tr>
<tr>
<td></td>
<td>2. In the Add a Note dialog box, enter Note Title and Note Body.</td>
</tr>
<tr>
<td></td>
<td>3. Click Done.</td>
</tr>
</tbody>
</table>
## Widget Type

<table>
<thead>
<tr>
<th>Widget Type</th>
<th>Steps</th>
</tr>
</thead>
</table>
| Web page    | Displays a web page on the Dashboard.  
1. Click the Web page icon.  
2. In the Add a Web page dialog box, enter Web URL, the address of the web page that you want to display on the Dashboard.  
3. Click Done.  
Limitations for web page widget:  
• The websites enabled with "X-Frame-Options", will not be displayed on the Dashboard.  
• The web URLs provided without prefixing a protocol (HTTP or HTTPS) will by default use the protocol of the Cisco Unified Intelligence Center application.  
• When Cisco Unified Intelligence Center is in HTTPS mode, you cannot configure HTTP based widget URLs in Dashboard.  
• You cannot add Dashboard permalink as web page widget.  
For information on viewing report permalinks in Dashboards as web page widgets, see View Report Permalinks in Dashboards. |
| Custom Widget | Adds custom widgets to the Dashboard.  
1. Click the Custom Widget icon.  
2. In the Add Custom Widget dialog box, enter Widget Title and Code Snippet.  
   **Note** In the Code Snippet box, you can enter any markup/code snippet of the widget that you want to show on the Dashboard. For example, HTML, XML RSS feed, JavaScript, and so on.  
   Maximum Limit: 1000 characters.  
3. Click Done. The embedded code appears on the Dashboard. |

### Run a Report from the Dashboard

Running a report from the Dashboard depends on the Don't show filter while executing a report check box selection in Reports > Manage Filters:

- If this check box is checked for a report, the system bypasses the filter and runs that report using the default filter.
• If this check box is unchecked for a report, for the first access, the system prompts you to choose a Filter to run that report.

---

**Note**

- The Filter prompt displays the corresponding icon to denote the type of report view, such as, Grid, Chart, Pie, and so on.
- In both these scenarios, from the ellipsis icon on the Report widget header you can access Filter to edit the filter criteria.

Click the Filter button to display the filter criteria in the Filter Data dialog box based on the following validations:

- Displays the filter criteria screens based on the selected report query type.
- Populates with the default filter criteria if the default filter is set for that report.

**Edit Filter Data**

You can edit the report filter data from the Dashboard in the following two ways:

- **Run mode**—Click the filter icon on the report widget header.
- **Edit mode**—Click the ellipsis icon and select Filter from the available menu options.

Modify the required filter criteria and click Run. The report refreshes reflecting the modified filter criteria.

---

**Note**

When you edit the report filter for a Dashboard during Create, Edit, or Run mode, the filter settings are stored in the browser cache and is specific to the individual user. Hence, the next time you sign in and run the Dashboard, the report widget uses the filter information stored in the browser cache and generates the report (without prompting you to update the filter criteria). The browser cache is retained up to 30 days.

Every time you run the report, the filter data in the browser cache is validated for permissions. If there is a permission mismatch, an error message appears that the filter you selected before is no longer valid and select the filters again.

Also, if any other user sign-in to the same browser, that user cannot view your filter settings.

The filter settings stored in your browser cache are cleared only:

- If you have not used the Dashboard for the last 30 days.
- If you manually clear the cache.

For more information on Report Filters, see *Report Filters*.

**Related Topics**

[Report Filters](#), on page 26
Run a Report from the Dashboard
Reports

- Overview, on page 13
- Report Actions, on page 14
- Add Template Help, on page 16
- Report Types, on page 17
- Manage Reports, on page 20
- Run Report, on page 31
- Import Reports, on page 34
- Export Reports, Report Definitions, and Folders, on page 35

Overview

Reports show data returned by Report Definitions (database query). The database queries extract this data and can be displayed in various Report Views—as grids and charts.

Users with the Report Designer user role can click the Reports from the navigation page to open the Reports page.

Note

All actions on the Reports interface are based on user role and on the user's object permissions for reports and for folders.

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

Stock Reports

Cisco provides stock templates to use with Unified Intelligence Center. You can download Stock reports from Cisco.com. Stock report templates display data that has been saved in the Unified ICM/CC database.

After installing Unified Intelligence Center, you can import stock templates using the Import feature and customize the stock reports to suit your business requirements. You can clone the imported stock templates using the Save As option and customize.

Stock reports have one default grid view. Few stock reports also have a chart view.

Related Topics
- Create Reports, on page 20
# Report Actions

The following table lists various actions that you can perform from the Reports.

**Table 3: Report Actions**

<table>
<thead>
<tr>
<th>Action</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Report-level actions</strong></td>
<td></td>
</tr>
</tbody>
</table>
| New          | Creates a new report in the selected folder.  
For more information, see *Create Reports*.  
**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. |
| Report       | 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. |
| Folder       | 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, subfolder, 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. |
<p>| Search       | Searches for a particular the Report. |
| <strong>Ellipsis(…) actions</strong>                                                                                                                          |</p>
<table>
<thead>
<tr>
<th>Action</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Edit</td>
<td>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 <strong>Finish</strong>. <strong>Note</strong> You cannot edit a Stock report.</td>
</tr>
<tr>
<td>Save As</td>
<td>Saves a copy of the report with a different name. <strong>Note</strong> By default, the reporting users do not have permission to create a subfolder in the Reports root folder. To get permissions, contact your administrator. <strong>Note</strong> You cannot perform the <strong>Save As</strong> action to move contents (reports or folders) into the Stock folder and its subfolders. <strong>Note</strong> The report description does not support the following special characters: Parentheses (( )) Angle brackets (&lt;,&gt;) Forward slash (/) Question mark (?) Quotes (&quot;) Any executable scripts; JavaScript</td>
</tr>
<tr>
<td>Rename</td>
<td>Renames a folder or a report. <strong>Note</strong> You cannot rename a Stock folder or a Stock report. <strong>Note</strong> Applies to the root-level folder.</td>
</tr>
<tr>
<td>Move</td>
<td>Moves Report or Folder from one folder to another. <strong>Note</strong> You cannot move custom folders or reports from within the Stock folder (and its subfolders) to other locations and the other way.</td>
</tr>
<tr>
<td>Add Help</td>
<td>Hosts the help page for Report Templates. For more information, see <em>Add Template Help</em>.</td>
</tr>
<tr>
<td>Delete</td>
<td>Deletes a report or a folder. <strong>Note</strong> You cannot delete a Stock folder or a Stock report.</td>
</tr>
<tr>
<td>Share</td>
<td><strong>Share</strong>—Grants <strong>View</strong> and <strong>Edit</strong> permissions for the Report within your group.</td>
</tr>
</tbody>
</table>
### 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**

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

2. **Step 2**
   Click the Ellipsis icon (…) next to the report row for which you want to create the help page and click **Add Help**.

3. **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.

---

### Related Topics

- Get Help on a Report, on page 49

---

## Report Types

There are three types of reports based on the query types:

- Historical report
- Real-time report
- Live Data report

### Report Components

These reports consist of the following components:

- **Data Source**
  
  The Data Source defines the sources that contain the data for the report. Unified Intelligence Center supports three types of data sources: Microsoft SQL Server, IBM Informix, and Streaming. The data source should be pre-configured for you. If it is not, contact your administrator to configure the appropriate data source.

- **Report Definitions**
  
  Each report has a Report Definition, which represents how data is retrieved from the data source for that report template. In addition to specifying how data is retrieved (by a simple MS SQL query, stored procedure query, real time streaming or an anonymous block query), a report definition contains the dataset that is obtained. This includes the fields, filters, formulas, refresh rate, and key criteria field for the report.

- **Reports**
  
  Reports show data returned by Report Definitions. This data is extracted by database queries.

- **Time Zone Conversions**
  
  The time zone conversion happens if there is a difference between the user and the data source time zones.

  **Daylight savings time consideration for Database Query Reports:** The Daylight savings time offset at the start of the date range is considered for the time zone conversion when the report is filtered. If the daylight savings change occurs somewhere in between the filter date and time ranges, the time zone offsets will not be computed properly if the user and the data source are in different time zones. In this case, you will have to split the time filter such that separate report invocations are run before and after the daylight savings time change.
The daylight savings time offset depends on the latest system time zone library.

**Example 1:**

User time zone: Australia/Sydney  
Data source time zone: America/New_York  
Daylight savings time changes: +1 hour for Sydney at 2013-10-06 02:00 a.m. DST +1 hour is already on for New York  
Filter selected by the user: 2013-10-06 to 2013-10-06, 12:00 a.m. to 11:59 p.m.  
Query formed in data source time zone: 2013-10-05 10:00:00 a.m. to 2013-10-06 09:59:59 a.m.  
Report displayed in user time zone: 2013-10-06 12:00 a.m. to 2013-10-07 12:59 a.m.

In this case, the report will display an extra hour of data as Sydney Daylight savings time is off at the start of the date range and on at the end of the date range.

**Example 2:**

User time zone: Australia/Sydney  
Data source time zone: America/New_York  
Daylight savings time changes: +1 hour on for Sydney at 2013-10-06 02:00 a.m. DST +1 hour is already on for New York  
Filters selected : 2013-10-06 to 2013-10-10, 03:00 a.m. to 11:59 p.m.  
Query formed in data source time zone: 2013-10-05 12:00:00 p.m to 2013-10-06 08:59:59 a.m.  
Report displayed in user time zone: 2013-10-06 03:00 a.m. to 2013-10-06 11:59 p.m.

In this case, the conversion happens as expected as there is no Daylight savings time change in between the date ranges.

**Example 3:**

User time zone: America/New_York  
Data source time zone: IST  
Daylight savings time changes: +1 hour DST at 2013-03-03 02:00 a.m. and off at 2013-11-03 02:00 a.m. for New York. No Daylight savings time changes for IST.  
Filter selected by the user : 2013-11-03 to 2013-11-03, 01:30 a.m. to 05:30 p.m.  
Query formed in data source time zone: 2013-11-03 11:00:00 a.m. to 2013-11-03 02:59:59 a.m.
Report displayed in user time zone: 2013-11-03 01:30 a.m. to 2013-11-03 04:30 p.m.

In this case, the report will display one hour less of data as New York Daylight savings time is on at the start of the date range and off at the end of the date range.

• **Report Views**

  A report can be presented in multiple formats (grid and charts). Each view can have its own set of fields. A single report can have multiple views.

• **Report Help**

  You can attach a help page specifically for your report. For more information, see *Add Template Help*.

**Historical and Real Time Reports**

**Historical report**—Retrieves data from the historical data source. Reports are populated with interval data that has a default refresh rate of 15 minutes. Historical reports have an upper limit of 8000 rows.

**Real-time report**—Retrieves data from the real-time data source. Reports are populated with interval data that has a default refresh rate of 15 seconds. Real-time reports have an upper limit of 3000 rows.

While running Cisco Unified Intelligence Center Historical and Real-Time Reports you can:

• 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.

  For more information on creating/editing views, see *Report Views*.

• Modify reports

**Live Data Reports**

**Live Data report**—Receives data from streaming data source. Live Data reports supports only grid view.

**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.
Manage Reports

Create 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

By default, reporting users do not have permission to create a subfolder in **Reports**. An Administrator can create a subfolder and grant access.

To create a new report, perform the following steps:

**Procedure**

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

**Step 2**
Navigate to the folder where you want to create the report.

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

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

**Step 4**
In the **New Report Wizard** tab > **Basic Information** section, enter or select the report details.

*Note*  
- The report name must be unique to Cisco Unified Intelligence Center.
- Use the arrows to select the appropriate Report Definition.

**Step 5**
Click **Next**.  
The **Manage Views and Thresholds** screen appears.  
For more information, see **Report Views** and **Report Thresholds**.

**Step 6**
Create report views and thresholds and click **Next**.  
The **Manage Filters** screen appears.  
For more information, see **Report Filters**.

**Step 7**
Create report filters and click **Finish**.

The newly created report is listed in the **Reports** tab.

**Related Topics**

- Add Template Help, on page 16
- Report Views, on page 21
- Report Thresholds, on page 24
Report Views

There are two types of report views:

- Grid View
- Chart View

---

**Note**

Do not delete the Report Definition fields that are currently associated with any of the manually created report views. If deleted, you must reapply the Data Fields for all the manually created report views to save the report.

For default grid views, the deleted field is removed automatically from the Data Fields list retaining any other fields in the Selected Field list. Hence, no additional action is required to save the report.

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/New Grid View** screen appears depending on your selection for edit or create.

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

**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.
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**.

---

# 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; Chart Name, Chart Description and click Next.

**Note**  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.

**Related Topics**

Chart Types, on page 23

**Chart Types**

<table>
<thead>
<tr>
<th>Chart Type</th>
<th>Chart Information</th>
<th>Add Data Fields</th>
<th>Preview and Format</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bar</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Column</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
</tbody>
</table>
## Report Thresholds

You can set a threshold indicator for a field to display if the field value meets the threshold condition. 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:

<table>
<thead>
<tr>
<th>Chart Type</th>
<th>Chart Information</th>
<th>Add Data Fields</th>
<th>Preview and Format</th>
</tr>
</thead>
<tbody>
<tr>
<td>Line</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Gauge/Numeric</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td></td>
<td><strong>Note</strong> To configure a Gauge chart, Report Definition must have at least one decimal field with footer configured.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pie</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td></td>
<td><strong>Note</strong> To configure a Pie chart, Report Definition must have at least one decimal field configured.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

To set the chart view for Dial Gauge/Numeric, perform the following steps:

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,
     - 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**.

You can select **Dial Gauge** or **Numeric** view for this report.

You can select **Pie** or **Donut** as the display type for this report.
Procedure

Step 1  From the Manage Views and Thresholds wizard, after adding the report views, click Next. The Thresholds wizard 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.

<table>
<thead>
<tr>
<th>Operator</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Matches</td>
<td>The Matches operator accepts Regular Expressions. Note that the Regular Expressions does not support:</td>
</tr>
<tr>
<td></td>
<td>• Flags (i, g, m, n, y), OR/AND any combinations of these flags.</td>
</tr>
<tr>
<td></td>
<td>• Leading and trailing forward slash (/).</td>
</tr>
<tr>
<td></td>
<td>Example:</td>
</tr>
<tr>
<td></td>
<td>• Valid Pattern → \w+\s</td>
</tr>
<tr>
<td></td>
<td>• Invalid Pattern → \w+\s/g</td>
</tr>
<tr>
<td></td>
<td>(As it contains leading and trailing forward slash (/) and a &quot;g&quot; flag.)</td>
</tr>
</tbody>
</table>

Step 4  Choose the options from No Fill and edit the threshold fields.

String fields; Always, Equal, Not Equal

Decimal fields; Always, Equal, Not Equal, Greater Than, Less Than, Greater Than Equal To, Less Than or Equal To, Between

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.

For example:

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.
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.

For existing reports, perform the above mentioned steps to add more thresholds.

Note Threshold configuration supports up to 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: `<a href=https://www.cisco.com target=_blank>cisco</a>`
  - Syntax to add an empty space as text substitute: `&nbsp;`
- **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.

Related Topics

Create a Grid View, on page 21
Create a Chart View, on page 22

Report Filters

Filter Types

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

Note You cannot view the filter page if the Report Designer has selected Don't show filter when executing report filter on the Reports page.
Cisco Unified Intelligence Center supports the following types of report filters:

- Date & Time
- Key Criteria
- Field Filters
- Parameters

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

**Table 4: 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>

**Date & Time**

- You can choose the Date and Time filter for a new a Report and also when you run an existing report. The Date & Time filter is not applicable for Real-Time and Live Data reports.

- Cisco Unified Intelligence Center uses the browser locale to display the Date & Time format in the filter page. If Cisco Unified Intelligence Center does not support the browser locale language, then the locale selected in the Cisco Unified Intelligence Center application is used.

To configure Date and Time filters for a report, perform the following steps:

**Procedure**

**Step 1**
After creating Views and Thresholds, click **Next** to view the **Choose Filter** dialog box.

**Step 2**
In the **Date & Time** filter wizard, select the **Date Range** and **Time Range** options.

- The options available in the **Date Range** and **Time Range** filter are predefined.

- Selection of the **Custom** option allows you to customize the **Date Range** and **Time Range** details.

  **Note**  
  You can select the days of the week (Days > Custom) only if the time interval spans more than a day. For reports that are based on the query type Anonymous Block, you cannot select days of the week. For more information, see [Cisco Unified Intelligence Center Report Customization Guide](https://www.cisco.com/c/en/us/support/customer-collaboration/unified-intelligence-center/products-user-guide-list.html).

**Step 3**
Select the **Save the chosen filter as default** check box if you want to retain the filter settings as default filter.
Step 4
Click Next.

---

**Key Criteria**

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

**Note**

Key Criteria fields are predefined filters and are displayed in the filter screen if they are defined in the Report Definition.

To configure Key Criteria filters while running a report, perform the following steps:

**Procedure**

**Step 1**
Click on an existing **Report** to view the **Choose Filter** dialog box.

**Step 2**
In the **Date & Time** filter wizard, select the **Date Range** and **Time Range** options and click **Next**.

**Step 3**
In the **Key Criteria** filter wizard, select the collections or values from the **Available** selection box.

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

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

**Step 4**
Use the arrows to move the selected collections or values to the **Selected** selection box.

**Step 5**
You can also select multiple collections or values.

**Step 6**
Click **Next**.

---

**Field Filters**

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

**Note**
You can configure Field Filters in reports:

- Only for SQL Query based reports.
- To filter a text, date, boolean, or a decimal field.

To configure Field Filters while running a report, perform the following steps:
Procedure

Step 1  Click on an existing Report to view the Choose Filter dialog box.

Step 2  In the Date & Time filter wizard, select the Date Range and Time Range options and click Next.

Step 3  In the Key Criteria filter wizard, select the collections or values from the Available selection box and click Next.

Step 4  In the Field Filters wizard, select the filter according to the following criteria.

Filter criteria/operators depend on the selected field type (date, numeric/decimal, boolean, or string).

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

- For String, select 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.

  - If the filter field is associated with a Value List, then specify any value or move one, all, or some items in the list to the Selected column to filter.

- For Boolean, select True or False from the Operator list.

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 mrDomainID 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.)

Configure Unified Intelligence Center Historical Reports in Cisco Finesse Desktop

Use the following code snippet to configure the Cisco Unified Intelligence Center Historical reports in Cisco Finesse Desktop.
In Enterprise deployment (Unified CCE and Packaged CCE), Cisco Unified Intelligence Center Historical reporting gadget is available out the box on Cisco Finesse Supervisor desktop only. Custom Permalink based gadget continue to work as before.

For Historical Gadgets, only one view is supported.

Note

Cisco Unified Intelligence Center Historical Reports does not support Grouping and Drill-downs in Cisco Finesse Desktop.

Code Snippet

```html
<gadget>https://<my-cuic-server>:8444/cuic/gadget/Historical/HistoricalGadget.jsp?gadgetHeight=310&viewId=F2D86F191000015B000000640A4E5A84&linkType=htmlType&viewType=Grid&EventTime=RELDATE%20LASTWEEK&User=VL%20CUIC%5Cadministrator</gadget>
```

- https://<my-cuic-server>:8444/cuic/gadget/Historical/HistoricalGadget.jsp?gadgetHeight=310
  —Indicates the Historical Gadget URL.

- &viewId=F2D86F191000015B000000640A4E5A84&linkType=htmlType&viewType=Grid
  —Indicates the default report permalink filters.

Note

You can retrieve this information from any report permalink.

- &EventTime=RELDATE%20LASTWEEK&User=VL%20CUIC%5Cadministrator</gadget>
  —Indicates the variable parameters that can be customized in addition to the default report permalink.


Run Report

Report Actions - Run Mode

The following table lists all the menu items and actions you can perform when you run a report.

<table>
<thead>
<tr>
<th>Action</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Report options</td>
<td></td>
</tr>
<tr>
<td>Edit View</td>
<td>Displays the Edit View dialog box. You can modify the current report view and click Done to instantly view the modified view.</td>
</tr>
<tr>
<td>Action</td>
<td>Description</td>
</tr>
<tr>
<td>---------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Save View As</td>
<td>Clones the existing report view. In the <strong>Save View</strong> dialog box, enter the Name and Description for the cloned view and click <strong>Save</strong>. The executed report page refreshes with the cloned view.</td>
</tr>
<tr>
<td>Create Chart View</td>
<td>For the executed report, you can directly create a chart view if you have <strong>Write</strong> permissions. After you create the chart view, the executed report page refreshes with the newly created chart view and gets listed in the view list.</td>
</tr>
<tr>
<td>Note</td>
<td>This feature is disabled for Mediasense and Live Data reports.</td>
</tr>
<tr>
<td></td>
<td>For more information, see <em>Create a Chart View</em>.</td>
</tr>
<tr>
<td>Group By</td>
<td>Add/remove/update grouping configurations for the current view (columns). Cisco Unified Intelligence Center grid reports support up to three levels of grouping.</td>
</tr>
<tr>
<td></td>
<td>If you are grouping the column with Date or Date time data type, you can group records on a Daily/Weekly/Monthly basis.</td>
</tr>
<tr>
<td></td>
<td>For more information, see <em>Group By</em>.</td>
</tr>
<tr>
<td>Manage Thresholds</td>
<td>Sets a threshold indicator for a field to display if the field value meets the threshold condition. Threshold indicators can be set only for views of type Grid and Gauge.</td>
</tr>
<tr>
<td>SQL</td>
<td>Displays the SQL code used to execute this report.</td>
</tr>
<tr>
<td>Export</td>
<td>Exports the executed grid report data into your local disk in a .xls format.</td>
</tr>
<tr>
<td>Report menu</td>
<td></td>
</tr>
<tr>
<td>Run or Pause the report</td>
<td>Click to run or pause the report respectively.</td>
</tr>
<tr>
<td>Print Report</td>
<td>Prints the report using your default printer.</td>
</tr>
<tr>
<td>Note</td>
<td>Reports in chart view supports only landscape mode in A3 size paper for printing.</td>
</tr>
<tr>
<td>Manage Filters</td>
<td>Displays <strong>Choose Filter</strong> dialog box to modify filter criteria for this report.</td>
</tr>
<tr>
<td></td>
<td>For more information, see <em>Report Filters</em>.</td>
</tr>
<tr>
<td>Refresh</td>
<td>Refreshes the Report page.</td>
</tr>
<tr>
<td>View Filter Information</td>
<td>Displays the filter information of the executed report.</td>
</tr>
<tr>
<td>Online Help</td>
<td>Displays the configured template help. You can configure template help for the report from the <strong>Reports</strong> page &gt;&gt; <strong>Add Help</strong>.</td>
</tr>
<tr>
<td></td>
<td>For more information, see <em>Add Template Help</em>.</td>
</tr>
<tr>
<td>Action</td>
<td>Description</td>
</tr>
<tr>
<td>----------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Only Thresholds</td>
<td>Enable this toggle button to view only rows with matching threshold values in the report. By default, this check box is unchecked for every report.</td>
</tr>
<tr>
<td></td>
<td><strong>Note</strong> This button is disabled for the grouped view.</td>
</tr>
</tbody>
</table>

**Related Topics**
- [Create a Chart View](#), on page 22
- [Report Thresholds](#), on page 24
- [Group By](#), on page 33

## 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.

---

## 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*

![Directory Structure of the Report ZIP File](image)

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.

---

**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.

- 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.

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.
Permalinks

Overview

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

Dashboard permalinks help you to share your Dashboards with other users and view Dashboards of other users.
To view the Dashboard permalink, perform the following steps:

**Procedure**

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

**Step 2** Click the ellipsis icon beside the required Dashboard and click Permalinks.

**Step 3** In the Permalinks dialog box, click HTML to display the Dashboard permalink in the Link text box.

*Note*  
- By default, all Dashboards are authentication enabled. When the **Authenticate Permalink** check box is enabled, users accessing the permalink are prompted to enter their credentials to view the Dashboard.

- When you uncheck the **Authenticate Permalink** check box for a Dashboard, users can view that Dashboard using the permalink, without authentication.

Sharing an unauthenticated permalink of your Dashboard shares even the authenticated report permalinks added into the Dashboard.

- For Dashboards that contain Live Data report, ensure to select the **Authenticate Permalink** check box.

**Step 4** Copy and paste the permalink in any browser to view the Dashboard.

**Step 5** Click Save.

---

### Permalink for a Report

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

*Note*  
Authenticated report permalinks are not supported in Cisco Finesse.

To view the Report permalink, perform the following steps:

**Procedure**

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

**Step 2** Click the ellipsis icon beside the required Report and click Permalinks.
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**
- Select the Authenticate check box if you want the permalink to be accessible with authentication.
- For Live Data reports, by default, the Authenticate check box is checked and disabled.

Step 4  To view the report,
- HTML and XML—Copy and paste the permalink (HTML and XML) in any browser
- Excel—
  The browser prompts you to download and save the file (Excel format) to the local drive.

Step 5  Click Save.

For information on viewing report permalinks in Dashboards as web page widgets, see *View Report Permalinks in Dashboards*.


---

**View Report Permalinks in Dashboards**

Viewing report permalinks in Dashboards as web page widgets depends on the authentication status of both reports and the dashboards. The following matrix provides different scenarios that supports viewing report permalinks in Dashboards.

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Un-Auth Dashboard</td>
<td>Not Supported</td>
<td>Not Supported</td>
<td>Not Supported</td>
<td>Supported</td>
<td>Supported</td>
<td>Supported</td>
</tr>
<tr>
<td>Auth Dashboard</td>
<td>Supported</td>
<td>Not Supported</td>
<td>Not Supported</td>
<td>Supported</td>
<td>Supported</td>
<td>Supported</td>
</tr>
<tr>
<td>Dashboard Viewer</td>
<td>Supported</td>
<td>Not Supported</td>
<td>Not Supported</td>
<td>Supported</td>
<td>Supported</td>
<td>Supported</td>
</tr>
</tbody>
</table>
View Report Permalinks in Dashboards
Schedule Report

- Schedule a Report, on page 43
- Daylight Saving Time and Scheduled Reports, on page 44
- Create a Schedule for a Report, on page 44
- Configure a Scheduled Report to Be Sent by Email, on page 46
- Configure a Report To Save to Remote Location, on page 47

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. 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.

---

**Attention**

You cannot schedule Live Data reports.
You can schedule reports in any of the following ways:

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

Note
The scheduler runs based on the server time zone and hence on the Schedule List page, the column **Next Scheduled Run** reflects the server time zone.

### 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.

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

Note
See Types of Report for more information.

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.

Related Topics
Types of Filters
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.
Step 5  Click Save.

\[ \text{Note} \]\n
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

\begin{itemize}
\item \textbf{Step 1}  In the Protocol drop-down list, select SFTP to establish secure connection to the remote location.
\item \textbf{Step 2}  In the Report View drop-down list, select the view of the report to be posted.
\item \textbf{Step 3}  In the Host field, enter the IP address of the remote location.
\item \textbf{Step 4}  Enter a Port number for the SFTP.
   \[ \text{Note} \]  The default port number is 22.
\item \textbf{Step 5}  Enter a Username for the host.
\item \textbf{Step 6}  Enter a Password for the host.
\item \textbf{Step 7}  In the Directory Path field, enter the location on the host to save your .csv file.
   \[ \text{Note} \]  Directory Path should be an absolute path.
\item \textbf{Step 8}  Click Save.
\end{itemize}

\[ \text{Note} \]

\begin{itemize}
\item 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.
\item The time field in a scheduled report of type CSV is displayed in seconds only.
\end{itemize}
CHAPTER 6

**View Help**

- View Cisco Unified Intelligence Center Help, on page 49
- Get Help on Cisco Unified Intelligence Center, on page 49
- Get Help on a Report, on page 49

**View Cisco Unified Intelligence Center Help**

In Cisco Unified Intelligence Center, two types of help are available:

- **Application-specific help**: This help content explains how to use Unified Intelligence Center in general.
- **Report-specific help/Template help**: This help content explains how to use the report. 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.

For more information on how to add the template help to report, see *Add Template Help* section.

**Related Topics**

Add Template Help, on page 16

**Get Help on Cisco Unified Intelligence Center**

Click the **Online Help** button on the homepage to access help window for Cisco Unified Intelligence Center.

**Get Help on a Report**

To get help on a report, perform the following steps

**Procedure**

**Step 1** From the **Reports** page, click the required report to open the report in the run mode.

**Step 2** Click the **Online Help** icon in the report toolbar.

The report template help appears in a new browser window.
You can configure template help for the report from the Reports page > Add Help. For more information, see Add Template Help section.
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 3: Gadget Toolbar*

**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 in the **Report name - View name** format. The Report View Selector list allows you to view the five report views.

- 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 or 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 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 or play icons respectively. As a reporting user, the pause or 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 or play button.

---

**Show Threshold Only**

When you check the **Show Thresholds Only** box, 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 Failover, on page 53

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.