



Cisco Unified Intelligence Center Reporting Application

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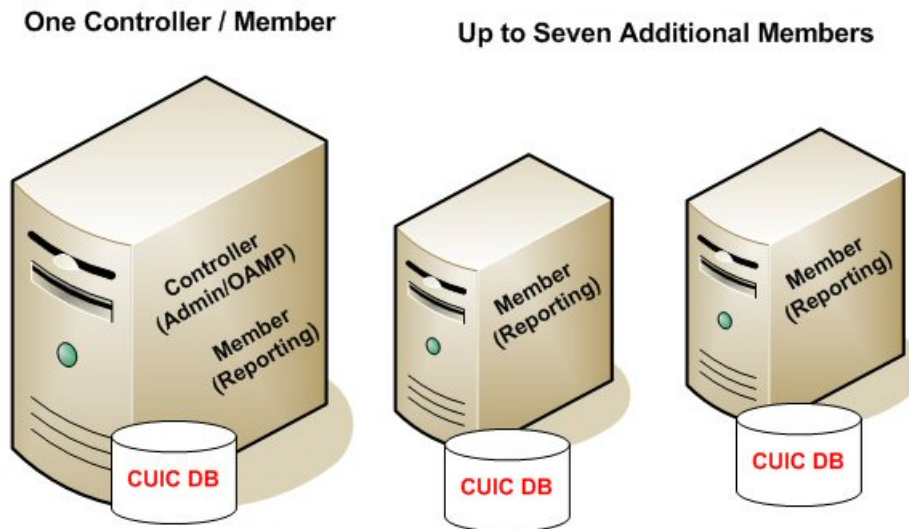
Cisco Unified Intelligence Center Installation and Setup

Who can install and set up Unified Intelligence Center: any user in your organization.

Unified Intelligence Center is installed by DVD media on a Cisco Unified Voice Operating System (VOS) platform. VOS is an appliance or *closed box* model and does not support navigation into, or manipulation of, the file system.

Unified Intelligence Center can be installed as a standalone server or as a cluster of a maximum of eight server nodes. Unified Intelligence Center consists of one mandatory publisher node (called the *Controller*) and a maximum of seven subscriber nodes (called *Members*). The Controller node includes a Member; thus a deployment can consist of a Controller alone.

Figure 1: Unified IC Cluster



Unified Intelligence Center has two web interfaces:

- The **Administration** application

The administration application is the **Operation Administration Maintenance and Provisioning** (OAMP) interface that provides application-level configuration for Unified Intelligence Center. This interface is offered on the Controller node only and is used by Unified Intelligence Center Super Users.

- The Unified Intelligence Center **Reporting** application

The Unified Intelligence Center reporting application is the interface for reporting users who can have various user roles pertinent to reporting.

You can find the installation instructions in the *Installation and Upgrade Guide for Cisco Unified Intelligence Center* located at <https://www.cisco.com/c/en/us/support/customer-collaboration/unified-intelligence-center/products-installation-guides-list.html>.

Obtain the License

To obtain your production license:

Download the file **Cisco Unified Intelligence Center Premium License** from the software page,

[https://software.cisco.com/download/details.html?moduleId=282163829&softwareId=282377062&release=11.6\(1\)&reind=AVAILABLE&relifecycle=&dtype=lic](https://software.cisco.com/download/details.html?moduleId=282163829&softwareId=282377062&release=11.6(1)&reind=AVAILABLE&relifecycle=&dtype=lic)

Access Administration Console

The [System Application User](#) who is defined during the installation is by default the initial Super User who can sign in to the Administration Application.



Note When you log in to the Admin Console site and you do not have any scheduled backup configured and enabled, Unified Intelligence Center returns the message “No active backup schedule is available. Set up a new schedule now.” Unified Intelligence Center displays this message only for the administrator.

To access the Administration console:

Procedure

- Step 1** Direct your browser to the URL *https://<HOST ADDRESS>/oamp* where *HOST ADDRESS* is the IP Address or Hostname of your server.
- Step 2** Sign in using your Super User (system application user) ID and password. A successful sign-in launches the OAMP application.
-

Upload License

You have limited functionality on the Administration Console and no access to Report Definition in the Unified Intelligence Center Reporting interface until you upload the Premium license file.

Download the **Cisco Unified Intelligence Center Premium License** file (**CUIC_Premium.lic**) from the page,

[https://software.cisco.com/download/release.html?mdfid=282163829&softwareid=282377062&release=11.5\(1\)&relind=AVAILABLE&rellifecycle=&reltype=latest](https://software.cisco.com/download/release.html?mdfid=282163829&softwareid=282377062&release=11.5(1)&relind=AVAILABLE&rellifecycle=&reltype=latest)

To upload the license:

Procedure

- Step 1** Sign in to the Administration Console and select **Cluster Configuration > License Management**.
- Step 2** Select **Upload license file (Browse)** and navigate to the local directory where your license is stored. Then click **Apply License** to load the license.
-

Sign In to Cisco Unified Intelligence Center Reporting Interface

Who can sign in to the Unified Intelligence Center reporting interface:

- Initially, the System Application User who is the default Superuser.
- Eventually, any Unified CVP user who was created in the Administration Console as an IMS superuser or an LDAP user.

Perform the following procedure to sign in to the Unified Intelligence Center reporting interface.

Procedure

- Step 1** Sign in to the Cisco Unified Intelligence Center Administration Console (<https://<HOST ADDRESS>/oamp>).
- Step 2** Navigate to **Control Center > Device Control**.
- Step 3** Click on the name of the Member node you want to access. This opens the Cisco Unified Intelligence Center login page for that member.
- Step 4** Enter your user ID and password. The Overview page appears.
- Step 5**
-

Create Reporting Users

Unified CVP reporting users can sign in to Unified Intelligence Center only if they exist in the Administration console as Superusers or if Active Directory (AD) is configured in the Unified Intelligence Center Administration console for their domain:

- Superusers who are added are considered to be IP Multimedia Subsystem (IMS) users.
- Users who are authenticated through Active Directory are considered to be Lightweight Directory Access Protocol (LDAP) users. For more information, see the Configure Active Directory Server section.

Both IMS users and LDAP users can log in to Unified Intelligence Center reporting and are restricted to the limited Login User role until the Unified Intelligence Center reporting security administrator gives them additional roles and flags them as active users.

Although you can create a user on the Unified Intelligence Center User List page, an entry on the User List is not sufficient for that user to sign in to the Unified Intelligence Center. One reason to create users on the User List page is to expedite the permissions for users before their Active Directory domain is configured.

Create Superusers

Procedure

- Step 1** Log in to the Cisco Unified Intelligence Center Administration Console (<https://<HOST ADDRESS>/oamp>).
- Step 2** Navigate to **Admin User Management > Admin User Management** to open the Users page.
- Step 3** Click **Add New** to add and configure a new user or click an existing username to edit the configuration for that user.
- This page has three tabs: General, Credentials, and Policy. For information about completing these tabs, see at https://www.cisco.com/en/US/products/ps9755/prod_maintenance_guides_list.html or the Administration console online help.
- Step 4** Click **Save**.
-

Create Reporting Users through OAMP

Procedure

-
- Step 1** Log in to the Cisco Unified Intelligence Center Administration Console (https://<HOST_ADDRESS>/oamp).
 - Step 2** Navigate to **Device Management > Unified CVP Reporting Server**.
 - Step 3** Select the Reporting Server for which a reporting user is to be created.
 - Step 4** Navigate to **Database Administration > Manage Reporting Users**.
 - Step 5** Click **Add User** to add and configure a new user or click an existing username to edit the configuration for that user.
 - Step 6** Click **Add** to add a new user.

All reporting users are created with Read Only privilege. Elevated privileges can be added with SQL DBA commands.

Configure Active Directory Server Settings

Fields on the Active Directory tab configure the Active Directory server to authenticate reporting users as they log in to the Unified Intelligence Center Web application.

Configure Active Directory for the Unified ICM/CC supervisors so that they can sign in as Unified Intelligence Center Reporting users.



Note Cisco Unified Intelligence Center uses LDAP V2 which does not support all Unicode characters that are used in the first name or surname of LDAP users.

Active Directory is not used to authenticate Administration Super Users. These Super Users can only be authenticated through the local database. The first Super User is added during installation. All other Super Users are added through the **Admin User Management** interface, and their credentials are encrypted into the local database.

To navigate to this page, choose **Cluster Configuration > Reporting Configuration** and select the **Active Directory** tab.

Table 1: Fields on This Tab

| Field | Description |
|---|--|
| Host Address and Port for Primary Active Directory Server | Provide the hostname or IP address and the port of the Primary Active Directory server. The port defaults to 389. |
| Host Name and Port for Redundant Active Directory Server | Provide the hostname or IP address and the port of the Redundant Active Directory server. The port defaults to 389. |

| Field | Description |
|----------------------------|--|
| Use SSL | Check these boxes if you want the connection from the Unified device to the Active Directory connection to be encrypted with SSL while doing authentication. |
| Manager Distinguished Name | <p>Enter the Manager Distinguished Name used to sign in to the Active Directory server.</p> <p>For example, on a default installation of Microsoft AD: CN=Administrator, CN=users, DC=MYSERVER, DC=COM. Replace <i>MYSERVER</i> and <i>COM</i> with your respective hostname.</p> <p>Note If users other than the LDAP administrator are configured as Manager Distinguished Name in the OAMP LDAP configurations, they should have the following rights:</p> <ol style="list-style-type: none"> 1. User search permissions on the domain. 2. Read access to the user objects and their attributes. 3. Read access to the base DN 4. Permission to bind to LDAP. |
| Manager Password | Enter the Active Directory manager password. |
| Confirm Manager Password | Confirm the Active Directory manager password. |
| User Search Base | <p>Specify the user search base. For example, on a default installation of Microsoft AD, CN=users, DC=MYSERVER, DC=COM, replace <i>MYSERVER</i> and <i>COM</i> with your respective hostname.</p> <p>Note This example assumes that you placed the users in the USERS subtree of AD. If you created a new organizational unit within your subtree, then the syntax would be: OU=MYUSERS, DC=MYSERVER, DC=COM, instead of "CN=MYUSERS".</p> |

| Field | Description |
|-----------------------|--|
| Attribute for User ID | <p>Whenever a user signs in, Unified Intelligence Center searches for that user in the LDAP (Lightweight Directory Access Protocol) using the sign-in attribute specified in the LDAP configuration. After the user is found, the full DNS of the user is extracted and used for authenticating the user.</p> <p>The sign-in attribute specified in the LDAP configuration is the property against which LDAP search is issued to find the matching username. If you do not know which attribute to use, use <i>sAMAccountName</i>, which is the default Microsoft username attribute.</p> <p>Different organizations settle on different LDAP attributes to identify the username across the organization, depending on the tools used to administer LDAP within their organizations. This attribute allows you to customize the sign-in depending on the attribute used. Even a custom attribute can be specified using this dialog.</p> <p><i>sAMAccountName</i> indicates the user attribute to search the user for is the <i>userPrincipalName</i>. <i>sAMAccountName</i> contains just the short username. For example, jDoe for the user John Doe.</p> <p><i>userPrincipalName</i> indicates the user attribute to search the user for is the <i>userPrincipalName</i>. This attribute contains the username in the email format, user@compay.com. This entire string becomes the username and not just user. Therefore when this attribute is selected, the user has to type the full email format in as the username in the sign-in box.</p> <p>Custom User Attribute allows you to specify the attribute used for searching the user in LDAP.</p> <p>Note Custom User attributes are not validated and are used as is. Ensure that the correct case and attribute name are used.</p> <p>Contact your Active Directory Administrator for the correct attribute to use.</p> |

| Field | Description |
|------------------------------------|--|
| User Name Identifiers | <p>Users are stored in Unified Intelligence Center in the format <UserName Identifier>\<username></p> <p>The username Identifiers are used to identify the different kinds of users within Unified Intelligence Center. For example, local, LDAP, user-synced user, users from different LDAP domains, nETBIOSName, and so on.</p> <p>Before you can use it, the username identifier has to be declared for use on this page. When LDAP is configured, at least one identifier must be configured and set as default to enable the system to identify LDAP users.</p> <p>UserSynchronization brings in users in format <syncdomain>\username and collections have users in the same format. Therefore, these users must sign in to Unified Intelligence Center using the <syncdomain>\user syntax. To enable, add <syncdomain> or @<syncdomain> (if you are using <i>userPrincipalName</i>) to the list of valid identifiers.</p> <p>The maximum allowed length of a username identifier is 128 characters.</p> <p>Example:</p> <p>When nETBIOSName and userPrincipalName are same or different:</p> <p><i>For sAMAccountName:</i></p> <p>Configure in Username Identifiers: <UserNameIdentifier></p> <p>Login in cuic : UserNameIdentifier\user</p> <p><i>For userPrincipalName:</i></p> <p>Configure in Username Identifiers: @<UserNameIdentifier></p> <p>Login in cuic : userPrincipalName</p> <p>This list box is pre-populated with the username Identifiers based on the list of usernames stored in the Unified Intelligence Center database. The most frequently occurring identifier in the list of username is auto-selected as the default.</p> <p>Note You cannot save LDAP configuration unless you choose a default Identifier from the User Name Identifiers list box and clicking the Set Default button.</p> |
| Set Default. (Username Identifier) | <p>Default identifiers allow users to sign-in without typing the full domain identifier (<domain>\user) or the <i>userPrincipalName</i> suffixes to usernames (user <@company.com>) on the sign-in page.</p> <p>It can be set by choosing one of the Identifiers from the list box and by clicking the Set Default button.</p> <p>Users who use any other identifier can still sign-in by typing their full identifier in the sign-in box. For example, domain2\user or netbiosname\user, provided those identifiers are already configured.</p> |

| Field | Description |
|-----------------|---|
| Test Connection | Click to test the connection to the primary and secondary LDAP servers and display the connection status. |

- **Save** saves the configuration information you entered for the Active Directory. Clicking **Save** *does not validate the configuration*.
- **Refresh** rolls back all changes since the last save and reloads the values set during the last save.

Cisco Unified Customer Voice Protocol Reporting User Role Additions

Who can add Unified CVP user roles:

- Initially, the system application user who has full permissions in Unified Intelligence Center reporting
- Eventually, any security administrator.

Once Unified CVP users log in to Unified Intelligence Center, they are added to the Unified Intelligence Center database and appear on the users list.

New users are initially defined as Login Users: the lowest level user role of Unified Intelligence Center. A Unified Intelligence Center Security Admin user must access the **User List** page to check a **User is Active** check box and to grant additional user roles to the user.

Create Data Source for Cisco Unified CVP Report Data

Similar to creating an Open Database Connectivity (ODBC) connection, this task is necessary to access the Unified CVP reporting data.

In Unified Intelligence Center, the user must perform this task with the System Configuration Administrator User Role.

Perform the following procedure to create a data source.

Procedure

-
- Step 1** Log in to the Unified Intelligence Center at `https://<hostname/ IP address of CUIC Publisher>:8444/cuicui`.
 - Step 2** From the left navigation pane, select **Configure > Data Sources**.
 - Step 3** Click **New** to open New Data Source window.
 - Step 4** Complete fields on this page as follows:

| Field | Value |
|--------------------------------------|---|
| Name | Enter the name of this data source. Report Designers and Report Definition Designers do not have access to the Data Sources page but can see the list of Data Sources when they create custom reports. To benefit those users, give a new Data Source a meaningful name. |
| Description | Enter a description for this data source. |
| Data Source Type | Choose Informix . Note Type is disabled in Edit mode. |
| Host Settings | |
| Database Host | Enter the IP address or hostname for the Unified CVP Reporting server. |
| Port | Enter the port number. Typically, the port is 1526. |
| Database Name | Enter the name of the reporting database on the Unified CVP reporting server. The database name can be <code>cvp_data</code> or <code>callback</code> . |
| Instance | Specify the instance name of the desired database. By default, this is <code>cvp</code> . |
| Timezone | Choose the correct time zone for the data stored in the database. In locations that change from Standard Time to Daylight Savings Time, this time zone is updated automatically. Note Set CVP datasource timezone configuration to UTC on CUIC. |
| Authentication Settings | |
| Database User ID | Enter the user ID of the Reporting User who is configured in the Operations Console to access the Unified CVP reporting database. (The <code>cvp_dbuser</code> account is created automatically during Unified CVP Reporting server installation.) |
| Password and Confirm Password | Enter and confirm the password for the database user. |
| Charset | Choose UTF-8. Note If this field is not set correctly, the Unified Intelligence Center cannot connect. |
| Default Permissions | View or edit the permissions for this datasource for My Group and for the All Users group. |

| Field | Value |
|---------------|---|
| Max Pool Size | Select the maximum pool size. Value ranges from 5-200. The default Max Pool Size value is 100 and is common for both the primary and secondary data source tabs. |

- Step 5** Click **Test Connection**.
If the status is not Online, review the error message to determine the cause and edit the data source accordingly.
- Step 6** Click **Save** to close the Add Data Source window.
The new data source appears on the Data Sources list.

Obtain Cisco Unified Customer Voice Portal Report Templates

Who can obtain import Unified CVP report templates: any user in your organization.

To import Unified CVP report templates complete the following:

Procedure

- Step 1** On the Unified CVP Reporting Server, click **Start**.
- Step 2** In the search box, type `%CVP_HOME%\CVP_Reporting_Templates` and press **Enter**.
- Step 3** Choose the files and copy them to the client computer from which you will launch the Unified IC Reporting web application.

Import Unified CVP Report Templates

Who can do this:

- Initially, the System Application User who has full permissions in Unified Intelligence Center Reporting.
- Eventually, any Report Designer who has full permissions.

Before reporting users can run the Unified CVP report templates in the Unified Intelligence Center reporting application, a Unified IC reporting user with permission to do so must import them into Unified IC and associate them with the Unified CVP Data Source.

Procedure

- Step 1** Launch the Unified Intelligence Center web application using the URL `https://<CUCI_ADDRESS>:8444/cuicui/`.

Step 2 Enter CUIC Username and Password.

Step 3 Create a folder to import the reports.

- a) Click **Reports**.
- b) From the toolbar, click **New > Folder**.
- c) Enter the folder name and click **Save**.

Step 4 Import the report templates.

- a) Click **Reports > New > Import**. You will be redirected to the CUIC legacy interface.
- b) Click **Reports > Import Report**.
- c) In the **File Name (XML or ZIP File)** field, click **Browse** and select the template file to import.
- d) In the **Save To** field, expand the Reports tree and select the folder created to import the report template.
- e) Click **Import**. CUIC validates the Report Definition ID in the template and successfully imports the template.

Note When one or more underlying Report Definitions do not exist in CUIC, you will be prompted to select a data source for the Report Definition and Value Lists. For information on creating Data Sources and Value Lists, see Cisco Unified Intelligence Center Report Customization Guide at <https://www.cisco.com/c/en/us/support/customer-collaboration/unified-intelligence-center/products-user-guide-list.html>.

Imported Cisco Unified Customer Voice Protocol Report Templates

Unified Intelligence Center has stock report templates and custom report templates.

Stock report templates are the UCCE templates that are installed with Unified Intelligence Center. These templates are populated from the Unified ICM/CC database. They are protected from modification and must be cloned using “Save As”.

Custom report templates are templates that are imported. Unified CVP templates, therefore, fall in the custom template category.

Unified Intelligence Center does not protect custom templates from modification.

Retain the imported Unified CVP templates and create Save As versions of the Unified CVP reports and Unified CVP report definitions.

Basic Cisco Unified Intelligence Center Reporting Concepts

The following table provides information about basic Unified Intelligence Center reporting concepts.

Table 2: Basic Unified Intelligence Center Reporting Concepts

| Term | Explanation |
|---------------------------|---|
| Dashboards | 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. |
| Data Sources | A data source is a connection to a database from which reports are populated. Each data source has a configuration page with the IP address, username, password, and database type for a database used by Unified Intelligence Center. |
| Reports | Reports contain data sets that are extracted by database queries and that can be displayed in various views--as grids, as charts, and as gauges. All reports are based on Report Definitions. |
| Report Definitions | A Report Definition defines the interface for a report. Each Report Definition contains the dataset that is obtained for a report including the SQL query, the fields, the filters, the formulas, the refresh rate, and the key criteria field for the report. Unified Intelligence Center separates Reports from Report Definitions. Only users who have a Premium license can view, create, and edit Report Definitions. |
| Report Templates | Report Templates are well-formed XML files based on Report Definitions. |
| Report Views | A report view is a layout presentation for the data that is retrieved for the report. Unified Intelligence Center supports two types of views: <ul style="list-style-type: none"> • Grid Views • Chart Views All reports have a grid view. The Unified CVP Call Traffic reports also have a chart view. You can create many views for a report, can define the default view for a report, and can change a report view once the report is generated. You cannot delete all views. Every report must have at least one view. |
| Value Lists | Value lists contain all reportable items of the same type, for example, all agents or all skill groups. |

| Term | Explanation |
|-------------------------|--|
| Collections | Collections are subsets of value lists that can be used to control the amount of data that users can select to populate a report. |
| Thresholds | You can set a threshold for a field in a report grid to configure that field to display in a distinctive format. |
| User Groups | User Groups are constructs that allow security administrators to partition Unified Intelligence Center functionality. Creating User Groups expedites the provisioning process when multiple users need the same access to dashboards and reports, or when users require distinct permissions and features based on regional or organizational requirements. |
| User Permissions | Users have permissions associated with the groups in which they are members, and each member of a group has specific permissions in that group. There are three levels of permissions, represented by three check boxes in the User Information page: READ, EXECUTE, and WRITE. |
| User Roles | User Roles confer the actions and capabilities that a user has in Unified Intelligence Center. There are seven User Roles, and each user can have multiple roles. |

Generate and Manage Reports

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 report 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 CCE 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.



Note Localization of stock report templates is not supported

The available stock report templates are:

- **Audit Trail**—view the sequence of audit records of the transactions related to create, update, modify, and delete that are performed on the entities of a Unified Intelligence Center server.
By default, only System Administrators can access and view this report. System Administrator can give permissions to other Unified Intelligence Center users to use this report.
- **Group Access Detail**—view access rights of groups that use Unified Intelligence Center resources such as Dashboards, Reports, and other resources.
- **Resource Ownership and Access**—view access rights of users and about ownership status of users who use Unified Intelligence Center resources such as Dashboards, Reports, and other entities.

For more information, click the "?" icon (Template Help) from the report in the run mode.

Report Actions

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



Note You can open a maximum of ten tabs at a time.

Table 3: Report Actions

| Action | Description |
|-----------------------------|---|
| Report-level actions | |
| New | |
| Report | <p>Creates a new report in the selected folder. For more information, see <i>Create Reports</i>.</p> <p>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.</p> |

| Action | Description |
|------------------------------|--|
| Folder | <p>Creates a new Folder. Use this feature to categorize reports.</p> <p>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.</p> <p>Note You cannot create folders inside the Stock folder.</p> |
| Import | <p>Imports a report.</p> <p>To import a report, you need the REPORT DESIGNER role and WRITE permission on the target folder where you want to import these reports.</p> <p>For more information, see <i>Import Reports</i>.</p> <p>For more information about permissions, see <i>Cisco Unified Intelligence Center Report Customization Guide</i> at https://www.cisco.com/en/US/products/ps9755/products_user_guide_list.html.</p> <p>Note Applies to all folder levels (root, subcategory, and report).</p> |
| Toolbar actions | |
| Refresh | <p>Refreshes the Reports page.</p> <p>Applies to all folder levels (root, sub folder, and report).</p> |
| Favorites | <p>To easily access your reports, you can tag Reports as your Favorites.</p> <p>Click the star icon beside the Report name to add to Favorites.</p> |
| Search | Searches for a particular the Report. |
| Ellipsis(...) actions | |
| Edit | <p>Edits the Report details. In the edit mode, you can add, modify, and delete report details, views and thresholds, and filters.</p> <p>After editing the Report, click Finish.</p> <p>Note You cannot edit a Stock report.</p> |

| Action | Description |
|----------|---|
| Save As | <p>Saves a copy of the report with a different name.</p> <p>Note</p> <ul style="list-style-type: none"> • By default, the reporting users do not have permission to create a subfolder in the Reports root folder. To get permissions, contact your administrator. • You cannot perform the Save As action to move contents (reports or folders) into the Stock folder and its subfolders. <p>Note The report description does not support the following special characters:</p> <ul style="list-style-type: none"> • Parentheses (()) • Angle brackets (< , >) • Forward slash (/) • Question mark (?) • Quotes (") • Any executable scripts; JavaScript |
| Rename | <p>Renames a folder or a report.</p> <p>Note You cannot rename a Stock folder or a Stock report.</p> <p>Note Applies to the root-level folder.</p> |
| Move | <p>Moves Report or Folder from one folder to another.</p> <p>Note</p> <ul style="list-style-type: none"> • You can move a Report or a Folder only if you have Edit permission on the parent folder of the Report or Folder being moved. • You cannot move custom folders or reports from within the Stock folder (and its subfolders) to other locations and the other way. |
| Add Help | <p>Hosts the help page for Report Templates. For more information, see <i>Add Template Help</i>.</p> |
| Delete | <p>Deletes a report or a folder.</p> <p>Note</p> <ul style="list-style-type: none"> • You can delete a Report or a Folder only if you have Edit permission on the parent folder of the Report or Folder being deleted. • You cannot delete a Stock folder or a Stock report. |
| Share | <p>Assigns appropriate permissions to access and manage the Report.</p> <p>Share—Grants View and Edit permissions for the Report within your group.</p> |

| Action | Description |
|------------|--|
| Permalinks | Displays the Report permalink. For more information, see <i>Permalink for a Report</i> . Note You can access permanent hyperlink only from a web browser. You cannot access it from an application such as Microsoft Excel to pull data or display a report. |

Add Template Help

You can configure individual help files to each Cisco Unified Intelligence Center report. You can either host the help page separately and point the report to it or create and upload the help page along with the report.

This help content is specific to the report and can contain explanation on:

- How to use the report
- Field description
- Details of the relationship between the fields
- How to interpret the report data or
- Any other report related information

You can upload only files in ZIP formats. ZIP files can contain multiple HTML files. The HTML page contents support rich text including images.



Note Help files does not support videos and other interactive content.

To configure the help page for a report, perform the following steps:

Procedure

- Step 1** From the left navigation pane, click **Reports**.
- Step 2** Click the Ellipsis icon (...) next to the report row for which you want to create the help page and click **Add Help**.
- Step 3** In the **Add Help** dialog box,
- If you want to set an external help page as the report help, select the **URL** option and enter the external URL location.
 - If you want to upload the help file, select the **Choose file** option and click **Browse** to upload a ZIP file (with HTML files).
- Step 4** After uploading the file, click **Save**.

Note When you run the report, click the "?" icon (Template Help) on the Reports toolbar to view the configured help file.

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.



Note The daylight savings time offset depends on the latest system time zone library.



Note Daylight savings start date or end date may (when the data is recorded) create an additional row (in the report output) due to the time zone value change in the SQL database. This applies to any template report, as well as for any query type (Anonymous block, Database Query, Stored Procedure, Real Time Streaming) that these template reports would use. For confirmation that SQL had time zone value change, use the Report Options icon from the report summary page and run the SQL command in AW node to validate the change in the time zone.

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 timezone: 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.
- Step 7** Create report filters and click **Finish**.
- For more information, see *Report Filters*.
- The newly created report is listed in the **Reports** tab.
-

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

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

Note Maximum length allowed for the grid view **Name**: 50 characters.

Step 5 From the **Font** selection box, you can select the font size from the list to display the grid data.

Step 6 Use the arrow buttons to select fields from the **Available** value list box to move to the **Selected** field list.

Step 7 You can use the following features to improve grid view display:

- **Header**—Use this feature to add (+) or delete (-) a header for the selected fields. This helps in categorizing the field set.

Note You cannot save the view with empty headers.

Post upgrade to Cisco Unified Intelligence Center 11.6, any empty headers that exist in the report views in prior releases are not migrated.

- **Edit icon**—In the Selected value list box, click the **Edit** icon (hover on the field value) if you want to edit the **Display Name** and **Column Width** for the selected field and click **Done**.

Note For Header fields, you can only edit the Display Name.

- **Sort Grid by Field**—Select the **Sort Grid by Field** check box to sort the selected report columns in either **Ascending** or **Descending** order. Selecting this check box enables the drop-down list to be populated with the values from the **Selected** value list box. You can select only one value for sorting.

Step 8 Click **Save**.
The **Report Views** screen appears.

Step 9 Click **Finish**.

Create a Chart View

Cisco Unified Intelligence Center supports the following chart types:

- **Bar**—Bar charts display discontinuous events and show the differences between events rather than trends. Bar charts are oriented vertically and can be stacked horizontally or clustered one below the other.
- **Pie/Donut**—Pie charts display quantities as proportions of a whole. The circle (pie) represents 100% of the data, with each quantity represented as a wedge of the appropriate size. Pie charts take decimal or numeric fields only. A pie chart cannot have more than 50 wedges. An error occurs if your data set and chart editor selections generate a pie chart with more than 50 wedges.

A doughnut chart is another display representation of a pie chart.

- **Column**—Column charts display discontinuous events and show the differences between events rather than trends. Column charts are oriented horizontally and can be stacked vertically or clustered side by side.
- **Dial Gauge/Numeric**—A gauge chart displays the dial representation of the report results as per the defined threshold.

The Numeric chart displays the report results in a number format highlighted as per the defined threshold.

- **Line charts**—Line charts display continuous quantities over time against a common scale. Use the Line charts to show trends.



Note

- Live Data reports do not support chart view.
- In the vertically oriented charts, for Cyrillic characters, the data labels in the Horizontal Axis field may be hidden or garbled. This is a known limitation. Hence, for Cyrillic characters, use the horizontally oriented charts.

To create a Chart View, perform the following steps:

Procedure

- Step 1** Create or edit a report.
- Step 2** Enter the report details in the **Basic Information** screen and click **Next**.
The **Manage Views and Thresholds** screen appears with a default grid view.
- Note** You can access Report permalinks only after completing the report creation. Report permalinks allow you to share your report with other users and view reports of other users. For more information, see *Permalink for a Report*.
- Step 3** Click **Create New > Chart view**.
- Step 4** In the **Create New Chart View** screen, click the required chart type. For more information, see *Chart Types*.
- Step 5** Enter the Chart Information; **Name**, **Description** and click **Next**.
- Note** Maximum length allowed for the chart view **Name**: 50 characters.
- For Cartesian type charts (Bar, Column, and Line), select the **Group Data** check box to group data:
- **By a field**—Select this option to create a chart view where the vertical axis shows fields with footer formula configured for line or column chart and horizontal axis with footer formula for bar chart.
 - **By label field**—Select this option to create a chart view where the vertical axis shows fields of decimal data type for Line or Column chart. In Bar chart, the horizontal axis shows fields of decimal type.
- Note** For Pie charts, you can only **Group Data by Label Field**.
- Step 6** In the **Add Data Fields** screen, select the **Label Field** from the drop-down list and **Data Fields** from the list box and click **Next**.
- Step 7** In the **Preview and Format** screen, enter or select appropriate information based on the selected chart type.
For more information, see *Chart Types*.
- Note** For the following Data Fields, the Column Type (Stacked and Grouped) feature is unavailable.
- Date and Time
 - Boolean
- Step 8** Click **Save**.
-

Chart Types

| Chart Type | Chart Information | Add Data Fields | Preview and Format |
|------------|-------------------|-----------------|--------------------|
| Bar | Yes | Yes | Yes |
| Column | Yes | Yes | Yes |

| Chart Type | Chart Information | Add Data Fields | Preview and Format |
|---------------|-------------------|---|---|
| Line | Yes | Yes | Yes |
| Gauge/Numeric | No | Yes Note To configure a Gauge chart, Report Definition must have at least one decimal field with footer configured. | Yes You can select Dial Gauge or Numeric view for this report. To set the chart view for Dial Gauge/Numeric, perform the following steps: <ol style="list-style-type: none">1. Enter the Range (min and max). Default: 0-1002. Define the zones. When the chart value is within any of the defined thresholds,<ul style="list-style-type: none">• The gauge pointer points to the corresponding color set in the threshold.• The Numeric text is displayed in the corresponding color set in the threshold.3. Click Save. |
| Pie | Yes | Yes Note To configure a Pie chart, Report Definition must have at least one decimal field configured. | Yes You can select Pie or Donut as the display type for this report. |

Report Thresholds

You can set a threshold indicator for a field to display if the field value meets the threshold condition. There are nine colors instead of the color palette for the threshold color selection in this release. Threshold indicators can be set only for view type **Grid** and **Chart > Gauge**.

For setting field threshold indicators for a **Chart > Gauge** view, see *Create a Chart View*.

For setting field threshold indicators for a **Grid** view, perform the following steps:

Procedure

- Step 1** From the **Manage Views and Thresholds** wizard, after adding the report views, click **Next**. The **Thresholds** screen appears.
- Step 2** Select a view to which you want to set the threshold and select the field name from the **Create new threshold** list.
The screen refreshes with a new panel for the selected field name.
- Step 3** Select a field operator and set a condition from the Operator list.

| Operator | Description |
|--|---|
| Matches | <p>The Matches operator accepts Regular Expressions.</p> <p>Note that the Regular Expressions does not support:</p> <ul style="list-style-type: none"> • Flags (i, g, m, n, y), OR/AND any combinations of these flags. • Leading and trailing forward slash (/). <p>Example:</p> <ul style="list-style-type: none"> • Valid Pattern → \w+\s • Invalid Pattern → ^\w+\s/g <p>(As it contains leading and trailing forward slash (/) and a "g" flag.)</p> |
| String fields; Always, Equal, Not Equal | In Report Definition, if the %format is defined for any field, then while setting the thresholds for that field, ensure to enter the decimal format of the percentage to render the condition in the report. |
| Decimal fields; Always, Equal, Not Equal, Greater Than, Less Than, Greater Than Equal To, Less Than or Equal To, Between | <p>For example:</p> <p>In Report Definition, if %format is defined for the field "SL" (Service Level) and you want to apply thresholds to this field to indicate "Red" if SL is less than 60%, set the following:</p> <ol style="list-style-type: none"> Define the threshold for the SL field. Set the Operator to Less Than. Enter the percentage value as 0 . 60. Select "Red" in the No Fill drop-down. Click Done. |

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

- Note** You can set conditions on the same or different fields:
- condition on same field: threshold and condition on the same field.
 - condition on different field: threshold for a field, based on the condition on the different field.
 - multi conditions on same field: apply threshold for a field based on the condition on different fields.
- Caution** When you upgrade to Unified Intelligence Center version 11.6 or later, all the threshold colors are retained for reports that are created in the earlier versions. But, when you modify the threshold, all the old threshold color selection are lost within the report. Hence, you must reconfigure the threshold color selection for that report.

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

Note Threshold configuration supports upto 30 thresholds for a field.

To edit an existing threshold from an executed report, click **Report options** and select **Manage Thresholds**.

- Step 5** Format the text in the field to appear when it matches the threshold condition. Use the following options:
- **Text Bold**—Select this check box to highlight the report field in bold.
 - **Text/Background Color**—Select a color from the drop-down for the text/background color in the field.
 - **Text Substitute**—Enter a new string if you want the text in the field to be replaced with it when it matches the threshold condition.
 - Syntax to add an html hyperlink as text substitute: `cisco`
 - Syntax to add an empty space as text substitute: ` `;
 - **Image Location**—Enter the URL path of the image if you want the text to be replaced with an image.

Step 6 Click **Done**.

Step 7 Click **Finish**.

Report Filters

Filter Types

Report filters in Unified Intelligence Center are used to present selective data. You can define the filter to 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 set and refine the default filter values using the **Actions > Set Default Filter** option.
- After the report is generated: You can refine the filter values using the filter icon.



Note You cannot view filters if the Report Designer has selected the **Don't show filter when executing report** check box during the report filter selection.

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

| Report Definition Query Type | Applicable Filter Tabs |
|----------------------------------|--|
| Database Query | Date & Time, Key Criteria, Field Filters |
| Live Data or Real Time Streaming | Key Criteria, Field Filters |
| Anonymous Block | Parameters |
| Stored Procedure | Parameters |

Date & Time



Note

- 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. 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* at <https://www.cisco.com/c/en/us/support/customer-collaboration/unified-intelligence-center/products-user-guide-list.html>.

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

Note Use only the Matches operator to filter the report data records with leading or trailing spaces. Do not use the Equal To or Not Equal To operators in such scenarios as Unified Intelligence Center trims the filter criteria before running the SQL query and hence does not fetch the matching results.

- 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**.
-

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 5: Report Actions

| Action | Description |
|-------------------------|---|
| Report options | |
| Edit View | Displays the Edit View dialog box. You can modify the current report view and click Done to instantly view the modified view. |
| Save View As | Clones the existing report view. In the Save View dialog box, enter the Name and Description for the cloned view and click Save . The executed report page refreshes with the cloned view. |
| Create Chart View | For the executed report, you can directly create a chart view if you have Write 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. Note This feature is disabled for Mediasense and Live Data reports. For more information, see <i>Create a Chart View</i> . |
| Group By | Add/remove/update grouping configurations for the current view (columns). 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. For more information, see <i>Group By</i> . |
| Manage Thresholds | 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. For more information, see <i>Report Thresholds</i> . |
| SQL | Displays the SQL code used to execute this report. |
| Export | Exports the executed grid report data into your local disk in a .xls format. |
| Report menu | |
| Run or Pause the report | Click to run or pause the report respectively. |
| Print Report | Prints the report using your default printer. Note Reports in chart view supports only landscape mode in A3 size paper for printing. |
| Manage Filters | Displays Choose Filter dialog box to modify filter criteria for this report. For more information, see <i>Report Filters</i> . |

| Action | Description |
|-------------------------|---|
| Refresh | Refreshes the Report page. |
| View Filter Information | Displays the filter information of the executed report. |
| Online Help | Displays the configured template help. You can configure template help for the report from the Reports page > Add Help . For more information, see <i>Add Template Help</i> . |
| Only Thresholds | 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. Note This button is disabled for the grouped view. |

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.

Cisco Unified Intelligence Center Reporting User Roles

There are seven User Roles, and a user can be assigned to one, any, or all of them. The roles are:

- Login User
- System Configuration Administrator
- Security Administrator
- Dashboard Designer
- Value List Collection Designer
- Report Designer
- Report Definition Designer

Depending on the size, staff, geographical distribution, and security practices of your call center, you might want to assign multiple user roles to a few people or to distribute user roles to many people.

Login User

By default, everyone who can sign in to Unified Intelligence Center is a Login User. Login Users have that role and only that role until the Security Administrator assigns additional roles or deactivates (removes) the Login User role.

A Security Administrator or System Application user can remove the login role from any user.

An active login user can:

- Log in to Unified Intelligence Center
- Open the Security drawer, access the User List, and edit his own User Information page; for example, to change his alias or phone number.

System Configuration Administrator

This user has all the rights of an active Login User and also:

- Has full access to the Data Sources drawer and its functions.
- Has full access to the Scheduler drawer and its functions.

Security Administrator

This user has all the rights of an active Login User and also has full access to the Security drawer and its functions.

Dashboard Designer

This user has all the rights of an active Login User and also has full access to the Dashboard drawer.

Value List Collection Designer

This user has all the rights of an active Login User and also:

- Has full access to the Value Lists drawer.
- Has View (Read) access to the Data Sources drawer.

Report Designer

This user has all the rights of an active Login User and also:

- Has full access to the Reports drawer.
- Has View (Read) access to the Data Sources and Value Lists drawers.
- Can access the Scheduler drawer to work with the user's own reports.

Report Definition Designer

This user has all the rights of an active Login User and also:

- Has full access to the Report Definition drawer.
- Has View (Read) access to the Data Sources and Value Lists drawers.

Users in the Administration Console

There are three user accounts that have access to the Administration console:

- [Super Users](#)
- [System Application User](#)
- [System Administration User](#)

Super Users

This user role is defined in the Administration console. It is the only user role for Administration.

The initial and default Super User is the *System Application User* who is configured during installation.

The initial Super User (the System Application User) can sign in to the Unified Intelligence Center Reporting console and has *all* User Roles and *full permissions* for all drawers in Unified Intelligence Center Reporting. Those credentials cannot be removed from the initial Super User.

Additional Super Users who are added in the Administration Console can also sign in to Unified Intelligence Center Reporting and are considered to be IMS users. They have limited Login User role only, until the Unified Intelligence Center Reporting security administrator gives them additional roles and flags them as Active users.

Local users can log in using their IMS username and password. After logging in for the first time, the users are listed on the User List Page. The username is not case sensitive, but the password is case sensitive.

System Application User

This user role is defined during installation. Although it is possible to define unique application user names and passwords during the installation of each node, you must use the same credentials for all installations.

The application user defined during the installation of the *Controller* is the only System Application User recognized by Unified Intelligence Center.

This user has full rights to all functions in the Administration and Unified Intelligence Center Reporting applications, as described below:

- Can log in to the Administration application and becomes the initial Super User for Administration.
- Can create additional Super Users in the Administration application.
- Can log in to Unified Intelligence Center and has full rights to all functions in Unified Intelligence Center.
- Is the initial Security Administrator user in the Unified Intelligence Center Reporting application.
- Can create additional Security Administrator users in the Unified Intelligence Center Reporting application.
- Cannot have any role taken away from them.
- Cannot take any role away from himself.
- This user can log in to the Reporting application and is the initial System user.

System Administration User

The System Administrator account User ID and password are configured at installation for each node. You must enter the same user name and password for all nodes.

The System Administrator for the *Controller* can access:

- The Cisco Systems tools on the Navigation drop-down menu in the Administration console: Disaster Recovery System, Cisco Unified Serviceability, and Cisco Unified OS Administration interfaces.
- The CLI for the Controller.

The System Administrator has no access to functions in the Unified Intelligence Center Reporting application.



Note If you configure unique System Administrator credentials for Member nodes, use those credentials to access the CLI for those Member servers.
