

CUIC Reporting Quick Reference Guide



AZNet II – Arizona Network

Signing into CUIC Reporting Version 11.0

Open up your internet browser

Enter in the following URL:

https://PHXCCECUICPUB.voip.aznet.gov:8444/cuic/Main.htmx

or

https://TUCCECUICSUB.voip.aznet.gov:8444/cuic/Main.htmx

Bookmark this as you will be using this URL for your reporting needs.

Enter your ID, Password, and ACD phone Extension

- Username = your id matches your primary phone number (ex: 6027715555)
- Password = xxx@##### (##### = the last five digits of your primary phone number)
- The Authentication should be set to "LDAP"

Click the Login button



Internet Explorer 10 and 11 Browser Support

Unified Intelligence Center supports Internet Explorer 10 and 11 in the Compatibility View mode.

To turn on the Compatibility mode settings in Internet Explorer 10 and 11, follow these steps:

1. Open Internet Explorer.
2. Click Tools > Compatibility View Settings.
3. Enter the hostname of the Unified Intelligence Center server in the **Add this website** field, and click **Add**.

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Overview:

The screen is broken up into two main sections; Drawers on the left side, and your working pane on the right. There are only a couple of drawers that you will be using most of the time, and others that are not available to you due to security restrictions.



Let's take a look around.....

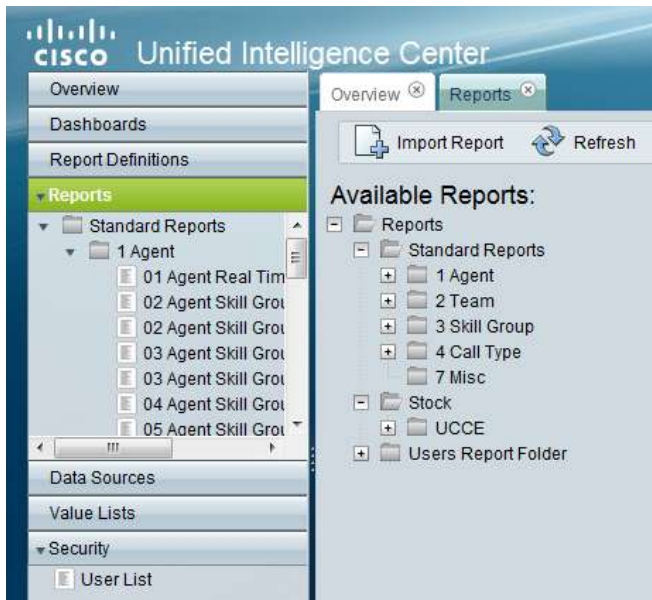
The main work drawers on the left {1} that you will be working in are Reports and Scheduler. In the reports drawer you can access all of the available real time and historical reports available to you, including your agencies private folder structure where you can save your personally generated reports. In the Scheduler drawer you can view your scheduled reports and create schedules for your reports.

As you click on drawers on the left {1}, you will see a new tab open up {2} on the main working pane. As you open up additional drawers or reports you will see additional tabs on the top of the screen. To go from one tab to another, simply click on the tab. To close out a tab, click on the "x" on the right of the tab you would like to close.

If you would like to review the applications user guide, click on the Overview hyperlink {3} on the Overview display.

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Reports Drawer:



Once you open the Reports drawer, you will see three separate categories:

- Standard Reports
- Stock
- User Report Folder

The Standard Reports folder will contain the majority of the Real Time and Historical reports. You will see the reports are further categorized by; Agents, Team, Skill Group and Call Type.

Agents: Any report specific to agent statistic information

Team: Information specific to your organization as a whole.

Skill Group: Any report associated with Skill Group statistic information.

Call Type: These reports are associated with defined call types within your call center application. In most cases this is primarily related to your inbound application.

All of the reports have the same functionality options related to filtering data, customizing fields, scheduling and saving. We will look at each of these functions.

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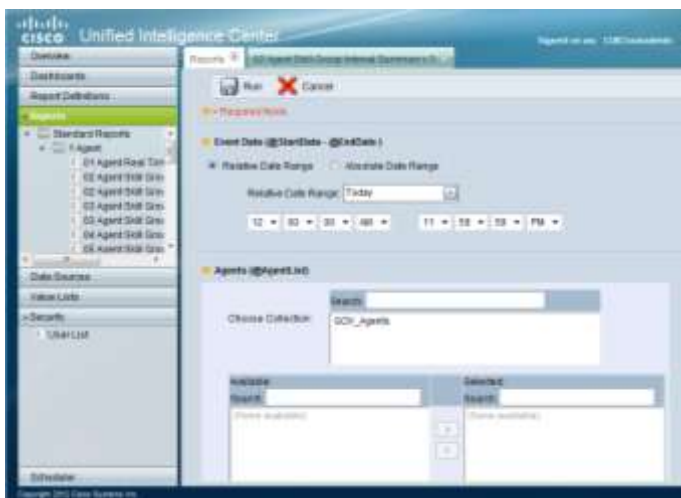
Report Functionality:

In each folder you will see a mix between Real Time reports and Historical reports.

Real Time reports are listed at the top in each report group.



Running a Report:



To run a report, simply click on the report name. You will be presented with a filter screen. If you are running a real time report you will not be provided options to select a date/time as they are real time displays.

Each call center has been set up with unique “Collections”. Collections are specific to your call center and will only include your agents, skill groups, call types, etc.

You will be required to select your collection and then remove unwanted selections from there.

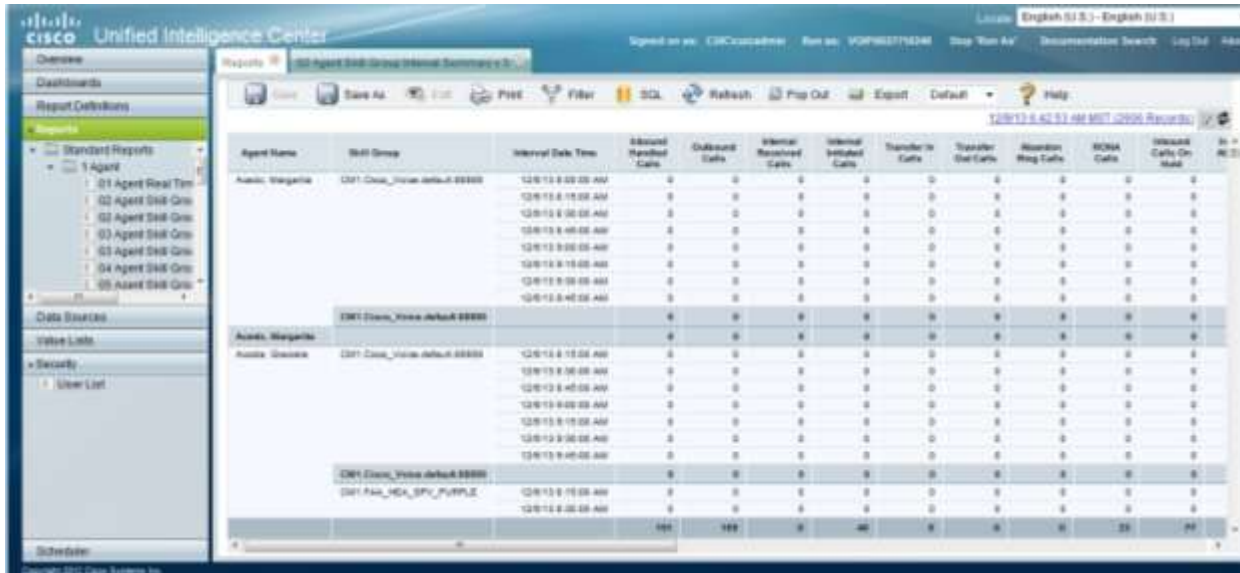
The top of the screen, on most historical reports, will allow you to select a relative date range or an absolute date range, as well as a specific time range.

To run your report, simply select your parameters for the date/time frame you would like the report to provide data for.

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Select your collection, and remove any unwanted selections by highlighting them and clicking the arrow to the unselected box.

Then simply click on the Run icon at the top of your working pane.



The initial view will be the default data fields for the report. There are a few options you can perform on this report.

Print = Print the report to any printer you have configured on your personal computer.


Filter = Modify the report filters that you selected when you ran the report.

Popout = Will present the report in an internet explorer view.

Export = Will allow you to export the report into Excel.

Default = This dropdown will provide an option for viewing all of the available fields on the reports.

Save As = will allow you to save the report to your personal folder and make further modifications to the fields visible in your view. Click on Save As, provide a name for your report, click the arrow next to Report Category and select the folder you would like to save the report in, specify the permissions (recommend read and write for your group only), then click on OK.

Hide/Show Fields = This feature allows the user to hide/show fields on the current display without affecting the saved copy of the report/view. The  icon can be found on the far right of the screen, just above the vertical page bars.

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How to Modify a Saved Report:

NOTE: There is a known bug with the application that does not allow your selected filters to be saved when you save a report. This bug will be fixed in an upcoming version of the application. We will explain how to get around this bug later in this section.

Once your report is saved, you have an Edit button that is now available in the top tool bar.

When you click on Edit, you now have a screen to select the specific fields you would like to display on your report and in what order you would like to see them.

You can also click on the Grouping icon and modify the grouping of your report.

Once your changes are made, select the Save button and your changes will be saved and the report will be run.



Options for Saved Reports:

Once a report is saved, you have options that can be done for each report when you right click on the report name in the working pane window.

Run = The report will run.

Schedule = Will allow you to schedule the report to run automatically.

Edit = will allow you to edit the parameters set on the report.

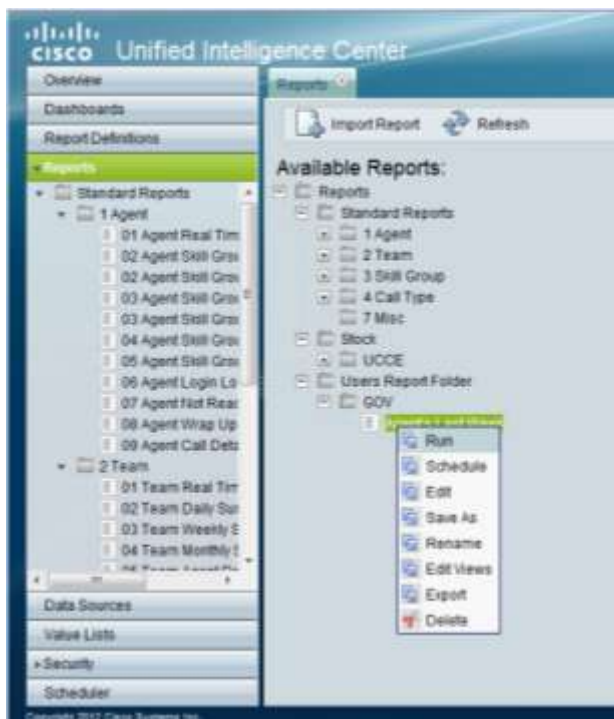
Save As = Will allow you to save the existing report into a new report with a new name.

Rename = You can rename the name of the saved report.

Edit Views = Allows you to modify the selected fields on your report and allows you to create **Permalinks** of your reports.

Export = Allows you to export the report definition onto your personal computer.

Delete = Delete the saved report.



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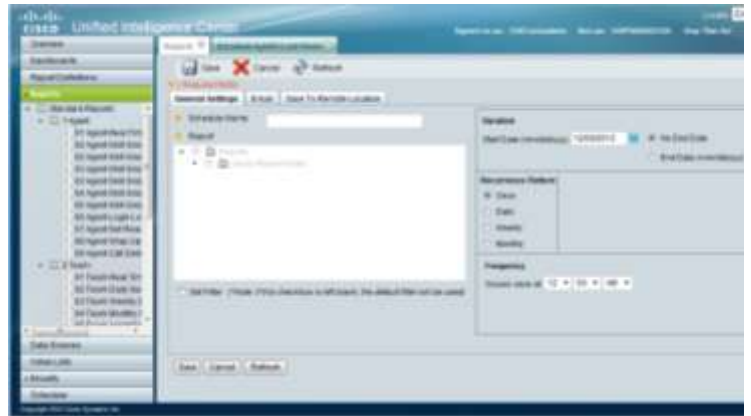
Scheduling a Report

You can schedule a report to run automatically and have it sent to you via email in a few different formats; Excel, pdf or in-line HTML.

You will need to:

- 1) Provide a name to the schedule. {Schedule Name}
- 2) Select the Duration, Reoccurrence Pattern and Frequency.
- 3) Enter an email address to send the report to. {click on Email tab}
- 4) Select All Fields or Default View. Default view will be the fields you saved to your report.
- 5) Select the email file type.

Once your selections have been made, click on the Save button. The report schedule will run right after you select Save and will then be scheduled to run on the schedule you specified.



To Disable or Delete a Schedule:

Click on the Scheduler drawer.

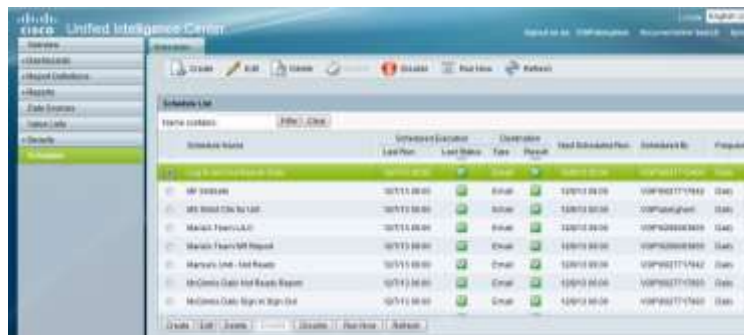
Click the radio button next to the scheduled report you would like to modify.

Edit = Edit the schedule of the report.

Delete = Delete the schedule.

Disable = Disable the schedule so the report does not run automatically.

Run Now = Will run the scheduled report at the time you click the button.



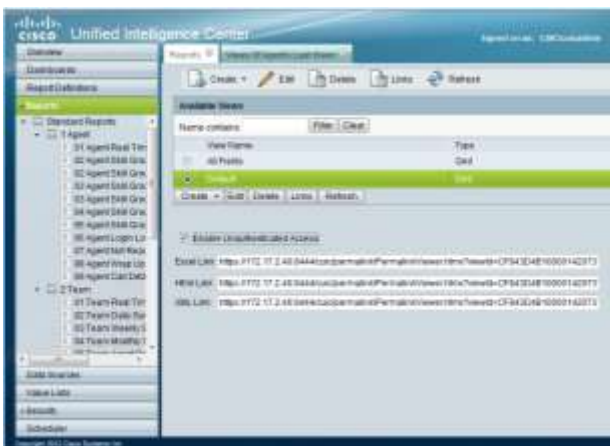
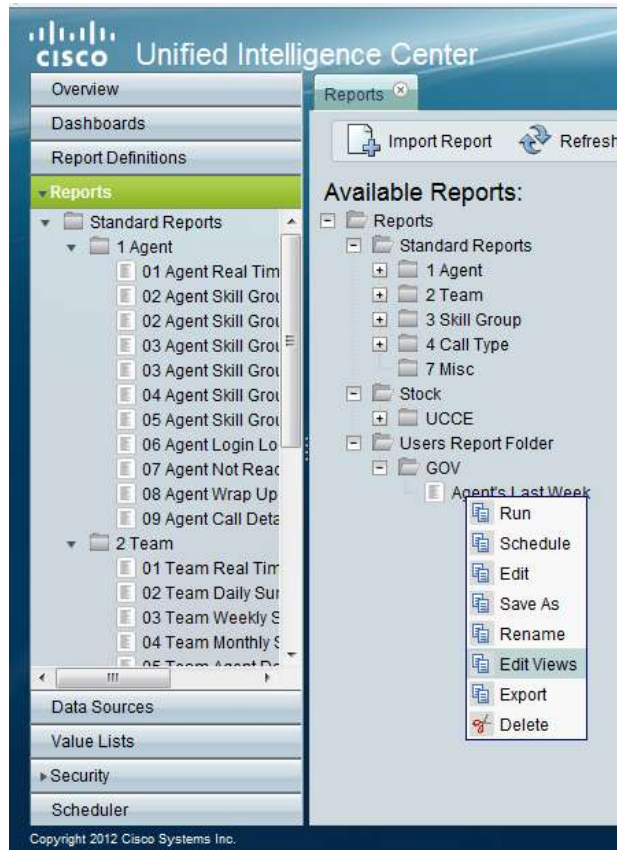
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Permalinks:

Permalinks provide a way for users to share real time reports and historical reports to other staff members that do not have access to the CUIC Reporting application.

Permalinks provide a URL view to non CUIC users of any report, real time or historical.

To create a permalink, from the Reports working pane, right click on the report you would like to share and click on Edit Views.



The next screen that appears will offer you to select All Fields the default report has defined or Default which will provide only the data fields you specified and saved in your report

Once your selection has been made, click the Links button.

There is one more option to select that allow non-CUIC users to view the report data. Click on the box next to the Enable Unauthorized Access link.

You can highlight and copy one of the links provided; Excel, HTML or XML. The most common used link is HTML.

This link can then be copied into an email and sent to users you would like to view the report.

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DashBoards:

The Unified Intelligence Center interface is organized by dashboards.

Dashboards are web pages that display reports, scheduled reports, sticky notes, and web-based elements, such as URLs and web widgets, that are relevant to specific workflows and responsibilities.

Click the Dashboards drawer in the left panel to open the Available Dashboards page. The dashboards you see when you open the Dashboards drawer are created dashboards that you and others created. You can see the dashboards created by others because they have given you permission to view.

You can manage dashboards from the Available Dashboards page—the page that opens when you click the Dashboards drawer.

Dashboards are contained in categories and sub-categories. Unified Intelligence Center is installed with one default dashboard category named Dashboards¹. All dashboards and sub-categories that your organization creates are nested under Dashboards. You can rename Dashboards. You cannot delete the Dashboards category.

Available Dashboards page



Actions from this page

- Refresh—updates both the Available Dashboards page and the tree under the Dashboards drawer to reflect changes anyone has made to add, modify, or delete dashboards or dashboard categories.
- Help—opens online help for the page.
- X—closes the page.
- Work with Categories:
 - Create sub-category from a category or a sub-category.
 - Delete sub-category
 - Rename sub-category
 - Set permissions for the sub-category.
- Drag and drop—You can drag and drop dashboards and sub-categories.

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- Copy and use the dashboard permalink—To retrieve the permalink, right click in the dashboard tree that you are copying the permalink to, and click on Html Link.

Create sub-category

Procedure

- Step 1** To create a category or a sub-category, right-click the parent (category or sub-category) and select Create.
- Step 2** In the dialog box, enter:
- a. The category or sub-category name (using a maximum of 50 characters).
 - b. The permissions for the Parent User group and the All Users group.
- Step 3** Click OK to save the category.

Delete sub-category

Procedure

- Step 1** To delete a sub-category, right-click its icon and select Delete. A dialog box appears that states that it will delete all of its children sub-categories and dashboards.
- Step 2** Click Yes to confirm the deletion. Click No to cancel.
- Step 3** Both Yes and No generate another dialog box confirming your action to delete or to cancel the deletion. Click OK to close this dialog box and complete the action.

Rename categories

Procedure

- Step 1** To rename a category or a sub-category, right-click the sub-category icon and select Rename. A dialog box with a Rename To field appears.
- Step 2** Enter a new name of up to 50 characters and click Rename to proceed.
- Click Cancel to keep the original name

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Drag and drop within categories

Use standard drag-and-drop actions to move items such as dashboards and reports from one category to another. You can also move an entire sub-category with all its component items.

Dashboard Permalink

Unified Intelligence Center supports permalink to a dashboard. To retrieve the permalink, right click on the dashboard in dashboards tree, click on Html Link and copy the permalink.

Permalinks of new reports need authentication and open in the authenticated mode. Permalinks of existing reports do not need authentication and open in the unauthenticated mode.

By default, the Enable Unauthenticated Access check box is not checked.

Create dashboard

Procedure

- | | |
|---------------|--|
| Step 1 | Right-click Dashboards or on a sub-category in the Available Dashboards page, and then click Create Dashboard. A dialog box opens and requests a name and the default permissions for the dashboard. |
| Step 2 | Enter a name of up to 50 characters. |
| Step 3 | Set the permissions for My Group. |
| Step 4 | Click OK to add the new dashboard to the Dashboards page. |
| Step 5 | To add content to the new dashboard, right-click its icon and select View. |

View dashboard

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

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

Actions from this page

- **Add**—Opens a dialog where users with the required permissions can add dashboard items. By default, the new dashboard is empty. A Dashboard Designer user without Write permissions can add items to a dashboard but cannot save the added items.
- **Auto Refresh**—Allows you to enable or disable auto refresh for data displayed in this window. When Auto Refresh is checked, the system refreshes data in real time. If this check box is unchecked, the data available remains static unless you refresh. If you click Refresh, the system refreshes the data in the window, but does not change the state of the Auto Refresh check box.