

Deploying Cisco Unified Intelligence Center Plus 10.x (DUIC+)

Course Summary

Description

Deploying Cisco Unified Intelligence Center Plus (DUIC+) is an Implementation and Administration course focusing on the CUIC reporting solution for Unified Contact Center Enterprise (UCCE), Packaged Contact Center Enterprise (PCCE) and Customer Voice Portal (CVP) environments.

CUIC is a comprehensive, end-to-end UCCE/PCCE reporting solution, designed to make the task of creating reports and managing disparate data sources, easier on the customer. Although CUIC is also used in the UCCX environment, this course focuses on UCCE and PCCE environments only.

The SLI course for CUIC combines the Cisco DUIC course with our own 100+ page "Addendum of CUIC Goodness" as reference material you will use and take home with you. Most of your time will be spent working in the lab environment which includes a live functional UCCE/CVP environment deployed with CUIC as the reporting solution. During this 3 day class, we'll keep you busy wearing multiple hats including architect, administrator, supervisor, agent and report customization specialist. Don't discount the need to know some of these roles, regardless of your role! The true way to make you better at your job is to broaden your horizon of knowledge, and knowing how all of these roles interact will ensure your success with the product.

- **Architecture.** Here we'll spend a bit of time discussing the big picture of how CUIC fits into your environment – which components of UCCE/PCCE communicate with CUIC and why you care. Product licensing and deployment models are major topics in this lesson. Also relevant is how your scripting decisions will affect reporting. Many a customer has been surprised in this section to learn that they have more than 1 CUIC server in their environment.
- **Database Integration.** CUIC integrates with CCE (ICM) data sources, and can also be configured to integrate with other data sources, most typically CVP. This may already be obvious to you, but what you may not know is the myriad other settings and configuration options which may affect reporting events from the Gateway all the way through ICM. Knowing practical tools and methods to find database schema information is a key topic in this section.
- **Security.** We'll convince you that it's wise to spend some time up front understanding user/group/role permissions and security before you start importing and customizing reports. We'll assume you want a flexible reporting solution to meet each customer's independent needs without maintaining an administrative security nightmare as a foundation for this lesson.
- **Importing reports.** By default, CUIC comes with very few reports – even the "stock" reports are imported. You'll need to know where to go to download new/updated reports for your environment. You'll also want to know how to easily import these reports into your solution. This topic will also serve as the beginning of your light bulb illumination regarding Report Definitions, Value Lists and Collections.
- **Active Directory Integration.** Now that you've got your datasources configured, your reports imported, and your security figured out, it's time for some Active Directory integration. If you follow our guidelines, you can now allow the automagic replication of your Supervisors into CUIC from Active Directory. If done right, this allows your supervisors to log on to CUIC with a standard ability to run reports and create dashboards, all without any replication of these users on your part with CUIC. We'll show you other tricks to get your other administrative users added to CUIC.
- **Customizing reports.** Regardless of how cool you made the report, someone will want to adjust its appearance to their own liking. Knowing you cannot modify the "stock" reports, you'll use your security knowledge to create a report repository where the right people will have an ability to customize their report. If you've ever wanted to create a default view of a report, a new report view (grid, chart, gauge), adjust a report column name or format, set a threshold or understand what a permalink is, you'll want to know how to customize a report. In this topic we'll continue the understanding of Value Lists and Collections, but not be done. This topic will usually promote a need to understand Report Definitions.

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- **Customizing Report Definitions.** This area distinguishes the standard from the premium licensed customer, and is an area of extreme power. This topic is where most other topics come together as one unit. This topic includes query types, fields, parameters, drilldowns and footers. We'll also fully illuminate your Value List and Collection light bulb in this lesson. We'll also teach you a neat trick useful for decoupling/recoupling your custom report from/with this new report definition. This is also the only part of the course which will test your SQL knowledge, or lack thereof.
- **Other.** A better name than junk-drawer, this subject includes other useful yet easily consumable topics such as Dashboards, Scheduling Reports, Exporting report data, permalinks, pop-outs...

Objectives

At the end of this course, students will be able to:

- Define how CUIC is implemented as a reporting solution in a UCCE/PCCE/CVP environment.
- Define the various interfaces to CUIC and their relevant use.
- Define CUIC "standard" data sources (CCE, CVP) as well as how to configure a custom data source.
- Demonstrate proficiency with regard to the security of users/groups/roles/permissions within CUIC.
- Demonstrate how to obtain and import reports into CUIC.
- Define other UCCE configuration settings which affect the output of data as seen from CUIC.
- Demonstrate how to install, administer, and provide user/group security for the CUIC solution.
- Define the role of Active Directory integration as it relates to CUIC Users, Supervisors and Teams.
- Demonstrate proficiency of use with regard navigation and use of the CUIC Reporting Solution for the creation of reports.
- Demonstrate proficiency with creating custom Reports
- Demonstrate proficiency with creating custom Report Definitions.
- Describe the benefit and use of various CUIC features including Dashboards, Value Lists, Collections, pop-outs and perma-links, just to name a few.

Topics

- CUIC Configuration
- CUIC Administration, Security and Basic Reporting
- Unified Intelligence Center Custom Reporting

Audience

This course is intended for anyone who desires an understanding of the CUIC reporting solution for a Unified CCE environment.

Prerequisites

- Familiarity with the UCCE or PCCE environment, or have at least heard of it.
- Working knowledge of Contact Center operations is desirable.
- Working knowledge of SQL commands is desirable, but not required.
- Working knowledge of Windows and the simultaneous use of the Alt and Tab key is helpful

Duration

Three days

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Course Outline

I. CUIC Configuration

A. Architecture Overview

1. How CUIC fits into the UCCE/PCCE environment
2. CCE Call Flow and CUIC Data Sources overview
3. Real-Time and Historical Reporting Concepts
4. Stock vs. Custom Reports Concepts
5. CUIC Sizing Considerations
6. Member Nodes
7. Licensing and Feature Sets
8. Compatibility issues
9. Deployment Models
10. CUIC Installation Overview
11. CUIC Administrative Interface(s) Overview
12. Report Definitions and Report Overview
13. Value Lists and Collections Overview
14. User Lists, User Groups and Security Overview

B. UCCE Configuration Requirements to Support CUIC

1. CCE Admin Data Server Requirements for CUIC
2. CCE Configuration to support CUIC
3. Setting up SQL Account(s) for CUIC integration
4. CVP Requirements for CUIC
5. CVP Reporting User for CUIC Integration
6. dbaccess Database tool for CVP
7. CVP VXML Server configuration for CUIC Integration
8. CVP Reporting Server configuration for CUIC
9. CVP Gateway Configuration for CUIC Reporting

C. CUIC Initial Configuration for CCE (ICM) Integration

1. Initial Login as Super User
2. Applying License File
3. Configuring UCCE Real-Time Data Source
4. Configuring UCCE Historical Data Source

5. Import "Stock" CCE Reports
6. CUIC A/D Integration and Synchronization
7. Observe Stock Reports, Definitions, Value Lists, Collections
8. Login as Supervisor and run stock report, create Dashboard

D. CUIC Initial Configuration for CVP Integration

1. CVP Data Source(s) Configuration
2. Importing Reporting Template(s) for CVP
3. Observe CVP items populated in CUIC for CVP Reports
4. ICM Reporting requirements for CUIC with CVP
5. CVP Reporting Configuration via Ops Console
6. VXML Server Configuration for Reporting
7. Ingress/VXML Gateway reporting requirements

II. CUIC Administration, Security and Basic Reporting

A. CUIC Administration

1. CUIC OS Administration
2. Admin User Drawer
3. Device Management Drawer
4. Control Center Drawer
5. Cluster Configuration Drawer
6. Network Management Drawer
7. Tools Drawer

B. Managing Users and Security in CUIC

1. Security Review
2. User List Page
3. Rights of Supervisors Imported into CUIC
4. Rights of A/D users (non-Supervisors) in CUIC
5. User Groups Page
6. User Roles and Permissions
7. Administering Custom User Groups
8. Local Users

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Course Outline (cont'd)

C. Running Unified Intelligence Center Reports

1. Real-time vs. Historical Reports and Data Source Review
2. Report Definitions vs. Reports
3. Running a Stock UCCE Report
4. Running an Imported Stock/Custom CVP Report
5. Copying a Stock Report and Definition for Customizing
6. A closer look at the elements of a Report Definition
7. SQL query, Anonymous Block and Stored Procedure queries
8. Report "Views" – modifying how data is displayed via Charts, Gauges and Grids
9. Formatting Reports
10. Applying Report Field Thresholds
11. Applying Default Filters and Value Lists
12. Report Drilldowns
13. Reporting Perma-Links and Pop-Outs
14. Exporting Reports
15. Scheduling Reports
16. Creating Dashboards with Reports, Widgets and Notes

1. Create a new Data Source for RCD/TCD lookup
2. Create a new Report Definition for RCD/TCD
3. Modify fields in Report Definition to allow Drilldowns to Call Type and Routing Client reports
4. Create Custom RCD/TCD report
5. Modify report View to allow Thresholds
6. Run report and show effectiveness in a Support/Troubleshooting environment

III. Unified Intelligence Center Custom Reporting

A. Key Concepts

1. Webview vs. Unified Intelligence Center implications
2. Characteristics of Unified CCE Data – know your data!
3. Understanding SQL statements in a Report
4. Reporting in a Multichannel Environment
5. Why Report Data Can Differ
6. Configuration and Scripting implications for Reporting
7. ICM and CVP Database Schema Help
8. Importing Custom reports from developer.cisco.com

B. Creating A New Cisco Unified Intelligence Center Report