Unified Intelligence Center: Standard and Custom Reporting on Contact Center Express and Contact Center Enterprise

BRKCCT-2056

Carmen Logue, Product Manager
Vikram Gururaj, Product Manager
What we will cover

• What data is important?
• Intelligence Center to present the data
• Custom Reporting
• Live Data
• Unified Intelligence Center 10.5
Contact Center Journey

Waves of Innovation

Wave 1:
Cost

Wave 2:
Relationship

Wave 3:
Experience

Transactions
Interactions
Engagements

ACD
CTI, IVR, Segmentation
Multichannel, Enterprise

Reactive
Proactive
Cisco Executing Across the Three Waves

WAVE 1
Cost and Efficiency

Technology Imperatives
Site Virtualization
Desktop/Server Virtualization
Operational Reporting

Cisco Solution Sets
Unified CCE, CCX, Cisco Mobile Agent
VXI, Cisco UCS
Cisco Unified Intelligence Center
## Cisco Executing Across the Three Waves

### WAVE 1: Cost and Efficiency

**Technology Imperatives**  
- Intelligent Routing/Universal Queue/Channel Integration  
- IVR integration  
- Cradle to Grave Reporting

**Cisco Solution Sets**  
- Unified CCE, CCX  
- Customer Voice Portal  
- Cisco Unified Intelligence Center

### WAVE 2: Customer Relationship

**Technology Imperatives**  
- ICM

**Cisco Solution Sets**  
- ICM
Cisco Executing Across the Three Waves

WAVE 3
Complete Experience

WAVE 2
Customer Relationship

WAVE 1
Cost and Efficiency

Technology Imperatives

- Social CRM
- Video
- Enterprise Social/Collaboration
- Ease of Reporting Access

Cisco Solution Sets

- SocialMiner, Finesse Desktop
- Remote Expert, Telepresence, WebEx
- WebEx, Finesse Desktop
- Unified Intelligence Center Reports as Finesse Gadgets
What to Measure
What You Measure Depends on…

• Company Priorities
• Workforce
• Industry Regulations
• Locations
Typical Measurements

• Agent and Agent Team Measurements
  – Time Card (Logon and Logoff)
  – Number of Calls Handled, AHT
  – Not Ready State Breakdown

• Incoming Call and Task Measurements
  – Incoming, Answered, Abandoned
  – Average Delay, Average Handled Time

• Outgoing Call Measurements
  – Breakdown of Attempted, Connected
Scripting Drives Reporting

UCCE  DNIS/IVR  CALL TYPE  SCRIPT  SKILL GROUPS

UCCX  DNIS  APPLICATION  SCRIPT  CSQ
All activity for monitored peripherals is tracked and summarized at different intervals and in different categories and across all contact types:

- Call Type
- Skill Group
- Precision Queue
- Call Type Skill Group
- Agent
- Agent Team
- Campaigns
- Peripherals
- IVR Ports

Agent

Call & Task

Live Data
Real-Time
Historical
Detail Records
Intelligence Center Stock Report Packages

• Template zip file:
  – XML that represents the report and report definition
  – Report Online Help (OLH)
  – Localization files to support localization of report and OLH

• Stock Report Packages are
  – Included with Contact Center Express
  – Downloadable for all other products
    • Cisco.com software download area for Cisco Stock reports
    • Developer.cisco.com for beta and/or partner developed reports
Importing Reports from cisco.com

Download Software

Cisco Unified Intelligence Center

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Contact Center Enterprise Reports

- CUIC Admin Security (3)
- SocialMiner Historical (6)
- EIM/WIM Historical (3)
- CCE Historical All Fields (20)
- CCE Realtime All Fields (14)
- CCE Historical Outbound (10)
- CCE Realtime Outbound (4)
- CCE Historical Transition (32)
- CCE Realtime Transition (11)
- PCCE Live Data (4)
Making Sense of Contact Center Express Data

All activity for monitored peripherals is tracked and summarized at different intervals and in different categories and across all contact types.

- **Agent**
  - Live Data
    - CSQ
    - Agents
    - Chat
    - Email
    - Outbound

- **Call & Task**
  - Historical
Contact Center Express Reports

- CUIC Admin Security (3)
- CCX Chat (5)
- CCX Email (6)
- CCX Inbound Agent (10)
- CCX Inbound CSQ (9)
- CCX Inbound Other (7)
- CCX Outbound (5)
- CCX System (4)
- TOTAL: Each report has multiple views making it about 150 reports
Intelligence Center to present the data
Cisco Unified Intelligence Center

- Platform for report development
- Dashboard
- Extend reporting
  - Direct Export
  - Scheduled delivery
  - Click-to-report
- Link reports using drill down
- Segmented access by user and role
Intelligence Center functionality

- Finesse
- Dashboard
- Scheduler

Reports
- Views/Permalinks
  - Grid
  - Gauge
  - Chart

Report Definitions
- Query Types
  - SQL Query
  - Anonymous Block
  - Stored Procedure
  - JMS

Fields
- Parameters

Value Lists
- Collections
- User Synchronization

Data Sources
- UCCE Historical
- UCCE Real Time
- UCCX
- Live Data
- CVP
- Social Miner
- ...
Pre-Defined Data Source Objects

UCCE  Configuration changes required, allows standby configuration, needed for stock UCCE reports

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<tr>
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<th>Connected Node</th>
<th>Standby Node</th>
<th>Type</th>
<th>Database Host</th>
<th>Database Name</th>
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PCCE  Configuration for Live Data stock PCCE reports

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<td>JMS</td>
<td>✔️</td>
<td></td>
<td>Java Message Service (JMS)</td>
<td>Broker URL</td>
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# Pre-Defined Data Source Objects

## UCCX
Automatically configured in co-res deployments, needed for stock UCCX reports

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## CUIC
Always in online state, no change required, needed for stock system reports (eg., Audit Report)

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Intelligence Center functionality

Finesse
Dashboard
Scheduler

Reports
Views/Permalinks
Grid
Gauge
Chart

Report Definitions
Query Types
SQL Query
Anonymous Block
Stored Procedure
JMS

Fields
Parameters

Value Lists
Collections
User Synchronization

Data Sources
UCCE Historical
UCCE Real Time
UCCX
Live Data
CVP
Social Miner
...
## Report

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<thead>
<tr>
<th>Supervisor</th>
<th>Agent Team Name</th>
<th>Total On Team</th>
<th>#Logged On</th>
<th>Media</th>
<th>Active States</th>
<th>Hold</th>
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<td>Active In</td>
<td>Active Out</td>
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This is the same report
This is also the same report
### Supervisor Agent Team Name

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<th>Supervisor</th>
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</tbody>
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**One report, multiple views**
Multiple Views
Associate multiple report views with the same report data definition

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<tr>
<th>CSR Name</th>
<th>Agent ID</th>
<th>Chat Type</th>
<th>Chat Routed CSQ</th>
<th>Chat Skills</th>
<th>Chat Start Time</th>
<th>Chat End Time</th>
<th>Duration</th>
<th>Active Time</th>
<th>Accept Time</th>
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<td>Claudia Schiffer</td>
<td>ccxagt5</td>
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<td>Chat_Sales</td>
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<td>Sales</td>
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<td>Sales</td>
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<td>00:01:19</td>
<td>00:00:02</td>
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</tbody>
</table>

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Scheduling Reports

- Distribute via .pdf, .xls or embedded in email
- Publish to a .csv file for flat file integration
Schedule Reports: Best Practices

- System load during schedule report execution
  - Schedule reports during non-production hours
  - Don’t schedule reports at 00:00Hrs
  - Stagger the scheduled reports

<table>
<thead>
<tr>
<th>Schedule Name</th>
<th>Scheduled Execution</th>
<th>Destination</th>
<th>Next Scheduled Run</th>
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<th>Frequency</th>
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<tbody>
<tr>
<td>Agent Team - Daily</td>
<td>5/14/14 09:15</td>
<td>Dashboard</td>
<td>5/15/14 01:05</td>
<td>CUI$administrator</td>
<td>Daily</td>
</tr>
<tr>
<td>Dashboard Scheduled Report</td>
<td>5/14/14 09:17</td>
<td>Dashboard</td>
<td>5/15/14 01:00</td>
<td>CUI$administrator</td>
<td>Daily</td>
</tr>
</tbody>
</table>
Intelligence Center functionality

- Finesse
- Dashboard
- Scheduler

Reports
- Views/Permalinks
  - Grid
  - Gauge
  - Chart

Report Definitions
- Query Types
  - SQL Query
  - Anonymous Block
  - Stored Procedure
  - JMS

Fields
- Parameters
- Value Lists
- Collections
- User Synchronization

Data Sources
- UCCE Historical
- UCCE Real Time
- UCCX
- Live Data
- CVP
- Social Miner
- ...
Dashboards

Consolidate reports and other content

- Scheduled Reports
- Sticky Notes
- Web pages
- Widgets
Intelligence Center functionality

- Finesse
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- UCCE Historical
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- Social Miner
- ...
Permanent Web Link

• Simplify distribution of reports and dashboards
  – Distribute for internal mobile users

• Provide one-click access to reports

• Enable Digital Signage or large screen monitors
Intelligence Center functionality

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Scheduler

Intelligence Center functionality diagram showing the integration of Finesse, Dashboard, and Scheduler, with reports, report definitions, query types, fields/parameters, and data sources.
Reporting Gadgets on Cisco Finesse

- Live Data reporting as gadgets
- Live Data gadgets failover in Release 10.5 for PCCE
CUSTOM REPORTING
Visual Customization

Create New Views

- Choose the right format what you want to display
  - Gauges for single values, charts for multiple
Visual Customization
Rearrange Column fields, Rename fields

- Group items together logically with headers
- Right-click on the field:
  - Properties
  - Thresholds
- Name columns to match company conventions
Visual Customization

Add thresholds to identify compliance violations

• Change colors or font or images based on values
• Stack up multiple thresholds

<table>
<thead>
<tr>
<th>CSR Name</th>
<th>Agent ID</th>
<th>Chat Type</th>
<th>Chat Routed CSQ</th>
<th>Chat Skills</th>
<th>Chat Start Time</th>
<th>Chat End Time</th>
<th>Duration</th>
<th>Active Time</th>
<th>Accept Time</th>
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<tbody>
<tr>
<td>Claudia Schiffer</td>
<td>cxxag15</td>
<td>Incoming</td>
<td>Chat_Sales</td>
<td>Sales</td>
<td>6/26/12 7:59:37 AM</td>
<td>6/26/12 8:01:03 AM</td>
<td>00:01:26</td>
<td>00:01:20</td>
<td>00:00:05</td>
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<tr>
<td>Claudia Schiffer</td>
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<td>Incoming</td>
<td>Chat_Sales</td>
<td>Sales</td>
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<td>Claudia Schiffer</td>
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<td>Incoming</td>
<td>Chat_Sales</td>
<td>Sales</td>
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<td>6/26/12 3:54:53 AM</td>
<td>00:02:37</td>
<td>00:02:32</td>
<td>00:00:03</td>
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<td>Claudia Schiffer</td>
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<td>Chat_Sales</td>
<td>Sales</td>
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<td>Helena Christensen</td>
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<td>Chat_Support</td>
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<td>6/6/12 4:52:49 PM</td>
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<td>00:02:51</td>
<td>00:02:44</td>
<td>00:00:06</td>
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<tr>
<td>Helena Christensen</td>
<td>cxxag13</td>
<td>Incoming</td>
<td>Chat_Support</td>
<td>Support</td>
<td>6/6/12 3:52:59 PM</td>
<td>6/6/12 3:54:20 PM</td>
<td>00:01:21</td>
<td>00:01:19</td>
<td>00:00:02</td>
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<tr>
<td>Helena Christensen</td>
<td>cxxag13</td>
<td>Incoming</td>
<td>Chat_Support</td>
<td>Support</td>
<td>6/6/12 3:52:59 PM</td>
<td>6/6/12 3:54:20 PM</td>
<td>00:01:21</td>
<td>00:01:19</td>
<td>00:00:02</td>
</tr>
</tbody>
</table>
Visual Customization
Provide additional groupings, summarizations and sorting

- Daily, Weekly, Monthly Groupings
Visual Customization: Best Practices

• Choose the right stock report
• ‘Save As’ Custom
• Save in a folder structure – Easy to find your reports
• Grant ‘execute’ permission for access only
• Choose the right view
  – Gauge for single values
  – Charts for multiple
Need more customizations?
Intelligence Center functionality

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Cisco Public
New Report Development

Pre – requisites

• Install Intelligence Center Standalone
• Premium / NFR / Lab License
• Ensure you have correct permissions
• Understanding of SQL, Schema is a must
Customize SQL query

- Choose the right Stock report
- ‘Save As’ a custom report
- Click on Report Definitions
- Go to Data Sources
- Customize SQL query
Custom reporting: Best Practices

```
SELECT * FROM Routing_Client_Five_Minute
```

“Give me” “All of the data”

CUIC needs to know which fields you want. “All” isn’t specific enough.
Add a formula

- Choose the right Stock report
- ‘Save As’ a custom report
- Click on Report Definitions
- Go to fields
- Create a New Formula field
Add more calculations

• Choose the right Stock report
• ‘Save As’ a custom report
• Click on Report Definitions
• Go to fields
• Click Edit Formatting
Report Development from scratch

Identify the Data (Data Source)

Know the Database Schema

• SQL query
• Anonymous Block
• Stored Procedure

Develop a Report Definition

• Create a Report
• Give Permissions
• Select Report definition
• Run & Validate

Customize the Report Views

Export Report Package

Import into Production System

Here you go!

Know the Database Schema

• Report
• Report Definitions
• Localization file
Customizing reports
Unified Contact Center Enterprise

• Unified Intelligence Center **Standard version**
  – Allows visual customization
  – Does not allow report definition customization

• Unified Intelligence Center **Lab/NFR version** (limited to 5 users)
  – Create new reports from scratch
  – Create drill-downs, change refresh intervals
  – Export reports to be imported into Production

• Unified Intelligence Center **Premium version**
  – Create new reports from scratch
  – Create drill-downs, change refresh intervals
  – Export reports to be imported into Production
Customizing reports

Unified Contact Center Express

• Unified Intelligence Center **Standard version**
  – Available out-of-the-box Co-res
  – Allows visual customization
  – Does not allow report definition customization

• Unified Intelligence Center **Lab/NFR version** (limited to 5 users)
  – Standalone lab setup
  – Create new reports from scratch
  – Create drill-downs, change refresh intervals
  – Export reports to be imported into Production
DEMO: Starting with Stock
Live Data!
Live Data Strategy

• Common approach in Contact Center Express and Packaged CCE
  – New integrated Real-time reporting in CCX
  – Side-by-side Replacement in CCE

• Phased across multiple releases
Live Data for Packaged CCE

• Updated in real-time: subscription versus “refresh rates”
• Agent and Agent Skill Group Real-Time Data
• Lightweight access to reporting
Live Data for Unified CCX

- Supervisor Reports
  - Team State
  - Team Summary
  - CSQ Summary
  - CSQ Detail

- Agent Reports
  - Agent State Log
  - Agent Statistics
  - Agent CSQ statistics
  - Agent Team Summary
What’s New in Release 10.5(1)

Addition of queuing data for Packaged CCE
Announcing Intelligence Center 10.5

**10.0**
- Live Data Phase 1
  - Live Data in UCCX, PCCE
  - Live Data reporting gadget in Finesse
  - Improved UI
- Time zone handling for relative dates

**10.5**
- Live Data Phase 2
  - Live Data gadgets failover
  - Skill group and Precision Queue Live Data Reports in PCCE
  - Chat & Outbound Live Data report for UCCX
- Support for 25K characters in report definition query
- Serviceability Improvements
<table>
<thead>
<tr>
<th>BRKCCT-1011</th>
<th>Cisco Unified Contact Center Express Update and Roadmap</th>
<th>Monday</th>
<th>08:00 AM</th>
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<tbody>
<tr>
<td>BRKCCT-1051</td>
<td>Cisco Unified Contact Center Enterprise and CVP Overview and Roadmap</td>
<td>Monday</td>
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<td>BRKCCT-2056</td>
<td>Unified Intelligence Center: Standard and Custom Reporting on Contact Center Express and Contact Center Enterprise</td>
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<td>BRKCCT-0001</td>
<td>Cisco Customer Collaboration: Why it's the Right Choice for Your Contact Center</td>
<td>Tuesday</td>
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<td>BRKCCT-2058</td>
<td>Deploying and Managing Packaged CCE</td>
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<td>03:00 PM</td>
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## Related Customer Collaboration Sessions

<table>
<thead>
<tr>
<th>Course Code</th>
<th>Title</th>
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<tbody>
<tr>
<td>BRKCCT-1002</td>
<td>Hosted Collaboration Service Contact Center Overview</td>
<td>Wednesday</td>
<td>08:00 AM</td>
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<tr>
<td>BRKCCT-1009</td>
<td>Cisco Customer Collaboration Architectural Vision</td>
<td>Wednesday</td>
<td>04:00 PM</td>
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<td>BRKCCT-1031</td>
<td>Cisco Finesse - The Next Generation Agent Collaboration Experience</td>
<td>Wednesday</td>
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<td>BRKCCT-2015</td>
<td>Solution Enhancements and Troubleshooting in Unified Contact Center Express 10.0</td>
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<td>BRKCCT-3005</td>
<td>Solution Troubleshooting for Unified Contact Center Enterprise</td>
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<td>BRKCDN-2966</td>
<td>Programming with the Finesse API</td>
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<td>BSACOL-1008</td>
<td>Mobile Customer Care -- Are You Ready?</td>
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<td>CCSCCT-1300</td>
<td>Ingram Micro Contact Center</td>
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<tr>
<td>BRKCCT-2006</td>
<td>Omnichannel contact center solutions</td>
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<td>BRKCCT-2019</td>
<td>Cisco Unified Contact Center Express Planning and Design</td>
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<td>BRKCCT-2027</td>
<td>CVP Scripting - Call Studio</td>
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<td>BRKCCT-2050</td>
<td>Building recording and monitoring applications with the MediaSense API</td>
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<td>08:00 AM</td>
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<tr>
<td>BRKCCT-2051</td>
<td>Cisco Outbound Option Planning and Design</td>
<td>Thursday</td>
<td>02:30 PM</td>
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</tbody>
</table>
Ingram Micro Contact Center
Andrew Hill, Director IT and Shahryar Rehman, Director Business

CCSCCT-1300 - Ingram Micro Contact Center
Wednesday, May 21, 8:30 AM - 9:30 AM
Moscone South 302
Participate in the “My Favorite Speaker” Contest

Promote Your Favorite Speaker and You Could be a Winner

• Promote your favorite speaker through Twitter and you could win $200 of Cisco Press products (@CiscoPress)

• Send a tweet and include
  – Your favorite speaker’s Twitter handle <@GururajVikram, @CarmenLogue>
  – Two hashtags: #CLUS #MyFavoriteSpeaker

• You can submit an entry for more than one of your “favorite” speakers

• Don’t forget to follow @CiscoLive and @CiscoPress

• View the official rules at http://bit.ly/CLUSwin
Complete Your Online Session Evaluation

• Give us your feedback and you could win fabulous prizes. Winners announced daily.

• Complete your session evaluation through the Cisco Live mobile app or visit one of the interactive kiosks located throughout the convention center.

Don’t forget: Cisco Live sessions will be available for viewing on-demand after the event at CiscoLive.com/Online
Continue Your Education

• Demos in the Cisco Campus
• Walk-in Self-Paced Labs
• Table Topics
• Meet the Engineer 1:1 meetings
Thank you.