RingCentral

RingCX Analytics integration with third-party BI tools

RingCX Analytics gives you flexibility by supporting integrations with third-party business intelligence (BI) tools. If your organization already uses a BI tool, you can integrate it with RingCX Analytics to leverage existing investments and extend your analytics capabilities. Data produced by RingCX Analytics is processed and ready to be used in integrated BI reports.

Direct data access

RingCX direct data access (DDA) to historical reporting data lets you retrieve report-ready historical data and use it for various purposes, including:

- Custom analysis
- Integration with external systems
- Building your own custom reports

You can combine historical contact center data from RingCX Analytics with data from other sources to create comprehensive reports and dashboards using third-party BI tools like Tableau, Power BI, Qlik, MicroStrategy, and others.

RingCX Analytics provides DDA capability through two different mechanisms:

- Manual data download from any historical report
- Scheduled delivery of standard or custom historical reports

Data destinations

When you download a report's data manually, you can store it anywhere on your system for future access.

When you schedule Historical Reports, you can customize how and where you send data and reports. Reports can be formatted for and delivered by:

- **Email**: Sends reports through email
- **FTP**: Uses File Transfer Protocol (FTP) to send reports to your computer or server
- **SFTP**: Uses Secure Shell (SSH) File Transfer Protocol (SFTP) to send reports to your computer or server
- **S3 bucket**: Sends reports to your Amazon Web Services (AWS) cloud storage resource

The data in your scheduled reports will be identical to the data displayed in those reports in viewer mode. Learn about creating Historical Reports and historical analytics platform capacity.

Data file formats

Historical Reports can be exported in one of two file formats:

- **CSV**: Comma-Separated Values (CSV) file with raw data
- **XLS**: Excel spreadsheet with formatted report data

Note that Historical Dashboards are always exported as PDF files. To learn how to schedule or export dashboards, refer to Managing Historical Dashboards.

Required permissions

To view and download reports, and to create, view, and manage report schedules, you need to:

- Be an admin in RingCX
- Have Analyst-level access to Historical Analytics

You can only edit or delete the schedules that you created yourself. If you'd like to make any changes to scheduled reports that other users created, contact the owner of the schedule. If you can't reach the owner of the schedule, contact your account manager.

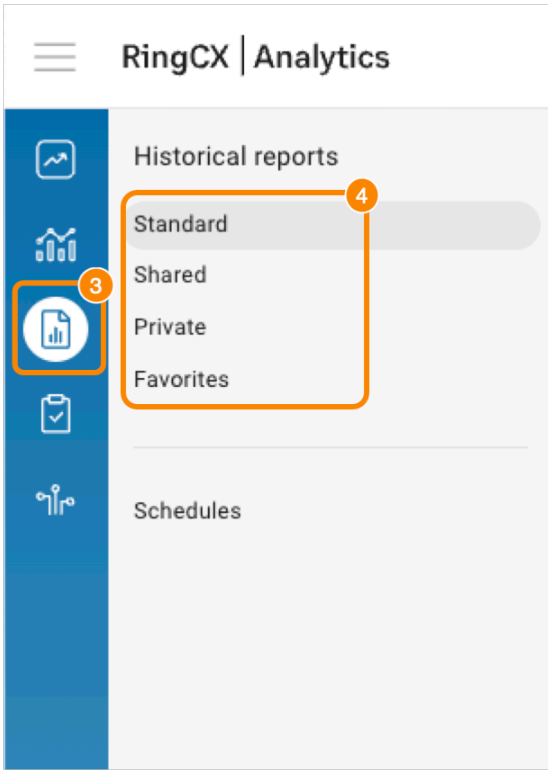
If you use a report created by another person in your schedule, and the original owner removes your access or deletes the report, a copy of that report is added to your **Private** folder, so it will remain in your schedule.

Downloading report data

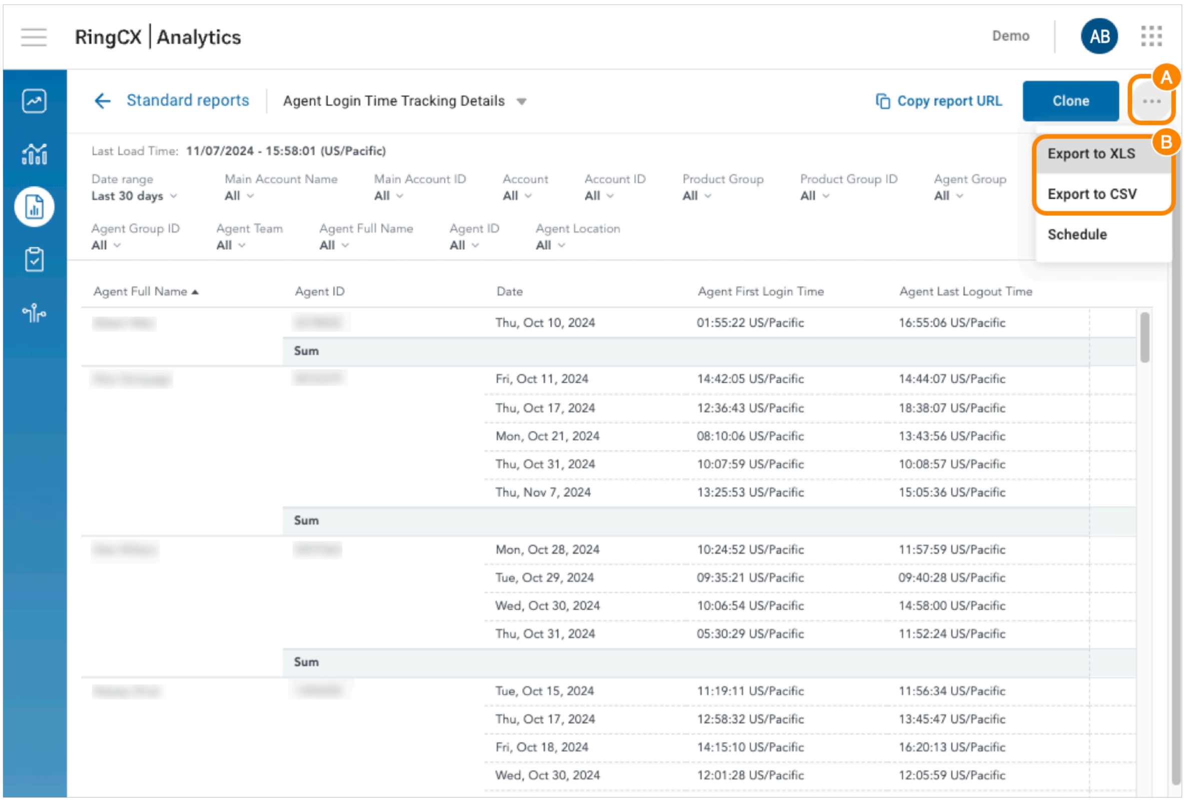
You can download any report's data manually in the report viewer mode. The filters you apply while in viewer mode will apply to manually exported data.

To download data from a specific report:

1. Sign in to RingCX.
2. Click the **Analytics** tile.
3. Click the **Historical reports** icon in the left navigation bar.
4. Select the folder location of the report you want to export: **Standard**, **Shared**, **Private**, or **Favorites**.



5. Click the name of the report you want to export.
6. Click the **Actions** icon in the top right corner (A), then select one of two export options (B):
    - *Export to XLS*
    - *Export to CSV*



7. Save the file with a name of your choice to a location on your system.

Creating a new schedule

You can create a schedule from any of three locations:

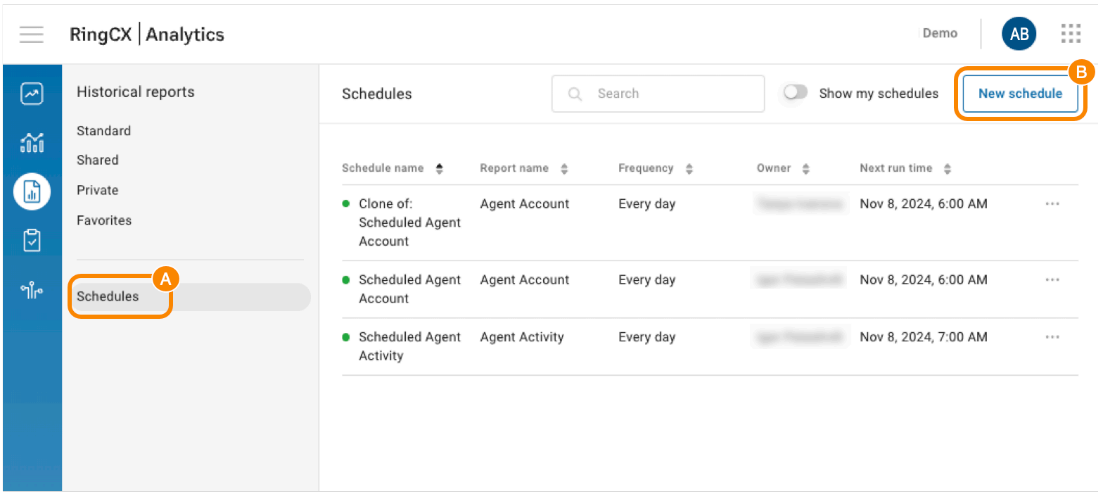
- The **Schedules** folder
- Any report folder: **Standard**, **Shared**, **Private**, or **Favorites**
- The report viewer mode

Note: The filters you apply to a report while in viewer mode won't be applied to schedules you create while in viewer mode. To receive scheduled reports with specific filters, first add the filters in edit mode.

To create a new schedule:

1. Sign in to RingCX.
2. Click the **Analytics** tile.
3. Click the **Historical reports** icon in the left navigation bar.
4. Do one of the following:
    - To create a schedule from the **Schedules** folder:
        a. Click **Schedules** to access the Schedules folder. (A)

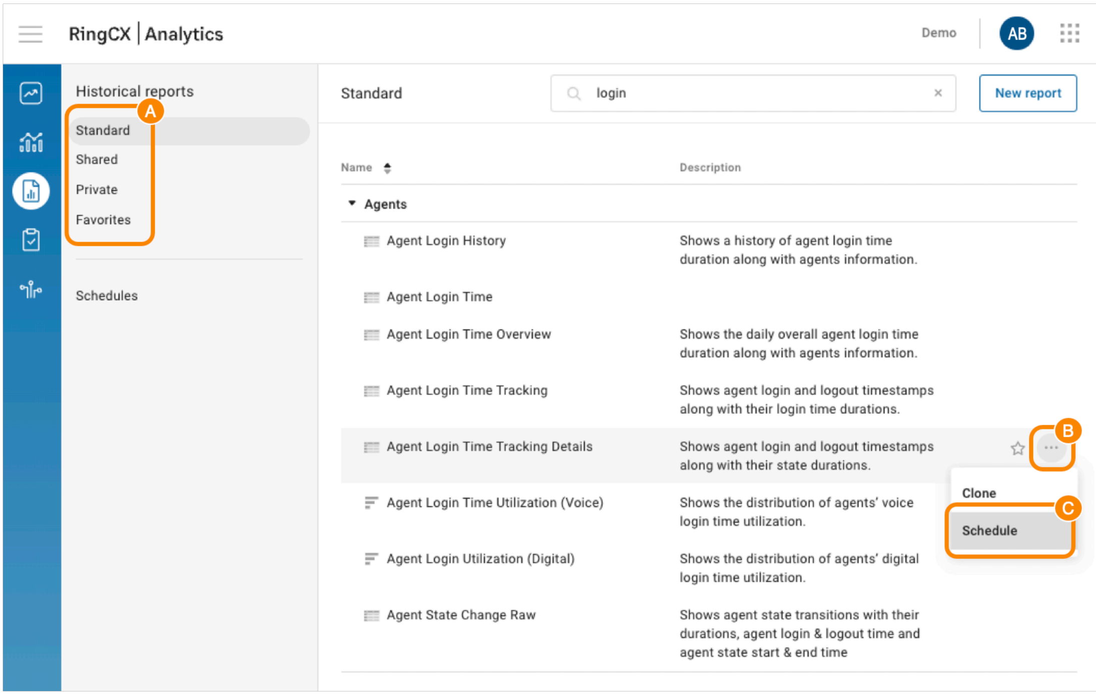
b. Click the **New schedule** button in the top right corner. (B)



- To create a schedule from a report folder:
  a. Select the folder location of the report you want to schedule: **Standard**, **Shared**, **Private**, or **Favorites**. (A)

  b. Click the **Actions** icon to the far right of the report you want to schedule. (B)

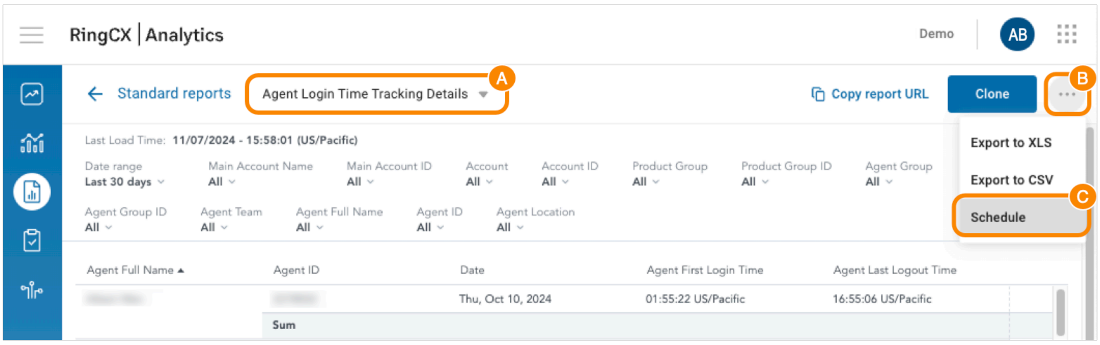
  c. Select *Schedule*. (C)



- To create a schedule from the report viewer mode:
  a. Select the folder location of the report you want to schedule: **Standard**, **Shared**, **Private**, or **Favorites**.

  b. Open the report you want to schedule. (A)

  c. Click the **Actions** icon in the top right corner (B), then select *Schedule* (C).



5. In the **General** section, use the **Report name** field to select the report you want to schedule.
6. In the **Schedule** name field, enter a name for your schedule.
7. In the **File type** field, select your preferred file type from the dropdown: *CSV* or *XLS*.
8. In the **Schedule** section, use the **Frequency** dropdown to select how often you want the schedule to run, then fill out the rest of the Schedule settings.
9. In the **Destination** section, use the **Destination type** dropdown to select your preferred destination, then fill out the rest of the Destination settings.
10. Click the **Test run** button to verify settings and credentials in your schedule. You can also test your schedule later.
11. Click:
    - **Save** to save the changes and remain on the schedule settings page.
    - **Save and close** to save the changes and return to the list of scheduled reports.

Schedule settings

General

- **Status**: Report schedule status: *Active* or *Inactive*
- **Report name**: Dropdown list of all Historical reports that are available to you
- **Schedule name**: Name of the schedule you're creating
- **File type**: CSV (default) or XLS
- **File name**: Customize the name of the CSV or XLS file you'll receive. By default, every file name includes the report name, run date and time, and time zone, using this syntax:
    - File name_mm.dd.yyyy_hh-mm_TZ
      If you don't customize the file name, it will use the name of the selected report, for example:
    - Agent Account Report_11.01.2024_09-30_PT.CSV

Schedule

Settings in the **Schedule** section vary according to the frequency type you select.

- **Frequency type**: Select how often you want the report sent to your chosen destination:
    - *All working days*
    - *Custom*
    - *Every day*
    - *Every hour*
    - *Every Monday*
    - *The first of the month*
- **Run time**: Set the time when you want your report to be sent, in this format: hh:mm AM/PM. The default value is 09:00 AM.
- **Starts**: Set the date when you want your report to start being sent. The default is the current day.
- **Ends**: Set the date when you want your report to stop being sent. Leave this field empty to keep sending the report until you deactivate it.
- **Timezone**: Select the time zone in which you want the schedule to run.
- **Repeat**: For reports with the frequency set to *Custom*, select how often you want to run your report. The default value is *Daily*.
- **Run every**: For reports with the frequency set to *Custom*, select the number of times you want your report to run, in conjunction with the **Repeat** setting.
  For example, if you want your custom report to run once a week, select *Daily* in the **Repeat** setting, then select 7 in the **Run every** setting.

Destination

Settings in the **Destination** section vary according to the destination type you choose. The default destination is *Email*.

- **Destination type**:
    - *Email*: Sends reports as email attachments.
    - *File transfer (FTP)*: Uses File Transfer Protocol to send reports to your computer or server.
    - *S3 bucket*: Sends reports to your AWS cloud storage resource.
    - *Secure file transfer (SFTP)*: Uses Secure Shell File Transfer Protocol to send reports to your computer or server.

Email

- **Subject**: Write the subject line for the email where your Historical report will be attached. The default is the schedule name.
- **Destination emails**: Enter one or more destination email addresses. Separate multiple addresses with commas, or by using the Enter/Return key to create a new line. The maximum limit is 100 addresses.
- **Message**: Customize the short email message that accompanies your report. The default text is: *Hello, Your scheduled email is ready.*
  Your custom message will be appended to the beginning of this standard text: *You can download the report in attachments. To view the interactive version of the report, please visit RingCX Analytics.*
- **Sender email**: Enter the email address of the email sender for the scheduled report. The default address is ringcx.analytics@ringcentral.com.

A custom sender's email will only be used for the report you're currently scheduling.

File transfer (FTP)

- **FTP server**: Enter the URL of your FTP server. The **ServerName** parameter can contain the names of one or more domains or subdomains, as long as each name consists of at least two characters. For example, domainname.rc.subdomain is a valid ServerName, but domainname.r.somedomain is invalid. Formatting options include:
    - [IP ADDRESS]/
    - [IP ADDRESS]:[PORT NUMBER]
    - [IP ADDRESS]:[PORT NUMBER]/
    - [ftp|FTP]://[IP ADDRESS]
    - [ftp|FTP]://[IP ADDRESS]/
    - [ftp|FTP]://[IP ADDRESS]:[PORT NUMBER]
    - [ftp|FTP]://[IP ADDRESS]:[PORT NUMBER]/
    - [ServerName].com
    - [ServerName].com/
    - [ServerName].com:[PORT NUMBER]
    - [ServerName].com:[PORT NUMBER]/
    - [ftp|FTP]://[ServerName].com
    - [ftp|FTP]://[ServerName].com/
    - [ftp|FTP]://[ServerName].com:[PORT NUMBER]
    - [ftp|FTP]://[ServerName].com:[PORT NUMBER]/
- **FTP username**: Enter the username of your FTP server's user.
- **FTP password**: Enter the password of your FTP server's user.
- **FTP directory**: Enter the directory's full path on the FTP server where you want to receive your report.

S3 bucket

- **S3 URL**: Enter the URL of your S3 storage bucket. Specify your preferred region in the AWS settings to use S3 URL with that region. Formatting options include:
    - http://s3.[region].amazonaws.com/[bucket-name]/
    - http://[bucket-name].s3.[region].amazonaws.com/
    - https://s3.[region].amazonaws.com/[bucket-name]/[key-name]
    - https://[bucket-name].s3.[region].amazonaws.com/[key-name]
    - https://[bucket-name].s3-[region].amazonaws.com/[key-name]
- **S3 Access Key ID**: Enter the Access Key ID of your S3 bucket.
- **S3 Secret Access Key**: Enter the Secret Access Key of your S3 bucket.

Secure file transfer (SFTP)

- **SFTP Server**: Enter the URL of your SFTP server. The ServerName parameter can contain the names of one or more domains or subdomains, as long as each name consists of at least two characters. For example, domainname.rc.subdomain is a valid ServerName, but domainname.r.somedomain is invalid. Formatting options include:
  - [IP ADDRESS]/
  - [IP ADDRESS]:[PORT NUMBER]
  - [IP ADDRESS]:[PORT NUMBER]/
  - [sftp|SFTP]://[IP ADDRESS]
  - [sftp|SFTP]://[IP ADDRESS]/
  - [sftp|SFTP]://[IP ADDRESS]:[PORT NUMBER]
  - [sftp|SFTP]://[IP ADDRESS]:[PORT NUMBER]/
  - [ServerName].com
  - [ServerName].com/
  - [ServerName].com:[PORT NUMBER]
  - [ServerName].com:[PORT NUMBER]/
  - [sftp|SFTP]://[ServerName].com
  - [sftp|SFTP]://[ServerName].com/
  - [sftp|SFTP]://[ServerName].com:[PORT NUMBER]
  - [sftp|SFTP]://[ServerName].com:[PORT NUMBER]/
- **SFTP username**: Enter the username of your SFTP server's user.
- **SFTP password**: Enter the password of your SFTP server's user.
- **SFTP directory**: Enter the specific location of the directory's full path on the SFTP server where you want to receive your report.

Testing a schedule

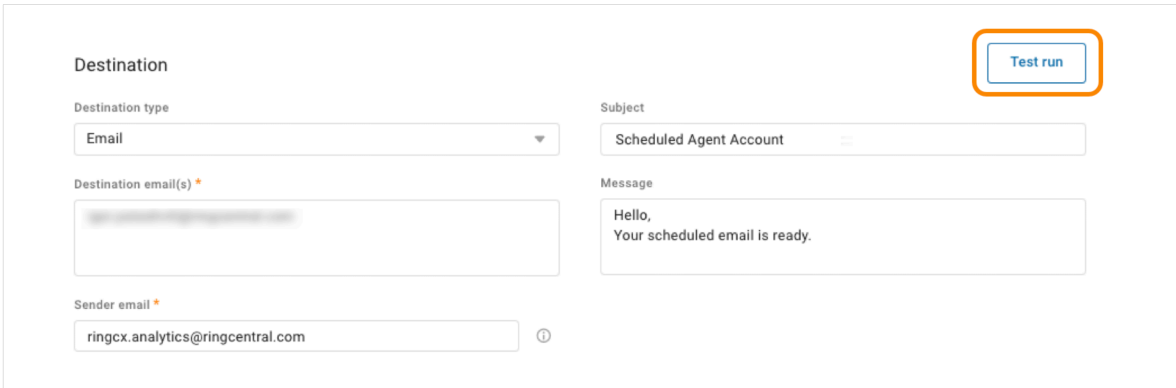
Testing a schedule helps you verify that your schedule settings and credentials are correct and your report can be delivered to the selected destination. You can do testing while creating or editing a schedule, or at any point after saving the schedule.

You can only test the schedules that you created yourself.

To test a schedule:

1. Sign in to RingCX.
2. Click the **Analytics** tile.
3. Click the **Historical reports** icon in the left navigation bar, then click **Schedules**.
4. Locate the scheduled Historical report using one of these methods:
   - Type the report name in the search bar.
   - Click the **Show my schedules** toggle to the right of the search bar.
5. Click the scheduled report name to open the schedule.

6. In the **Destination** section, click the **Test run** button.



7. Once the test is completed, you'll receive:
    - A green success message like *Report [Report Name] test run successfully delivered*. You can save the schedule and expect the report to be delivered as scheduled.
    - A red error message like *Please fix the error(s) on this page before continuing*. Fill out all mandatory fields and correct any errors before running the test again or saving the schedule. See the Troubleshooting section for details.

Troubleshooting schedule errors

If testing your schedule results in an error message, check the destination-specific settings.

Email

Confirm the following:

- The email address is correct.
- There are no issues with the email server.

S3, FTP, or SFTP

Confirm the following:

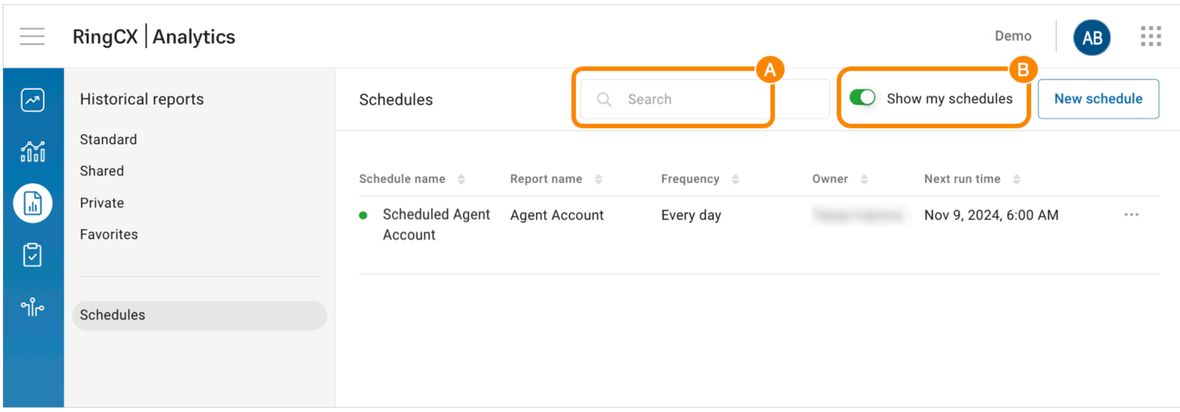
- The server URL is correct.
- The server credentials are correct.
- The path to the file directory is correct.
- There are no issues with your server.
- The specified user has rights to upload files to your server.

Viewing existing schedules

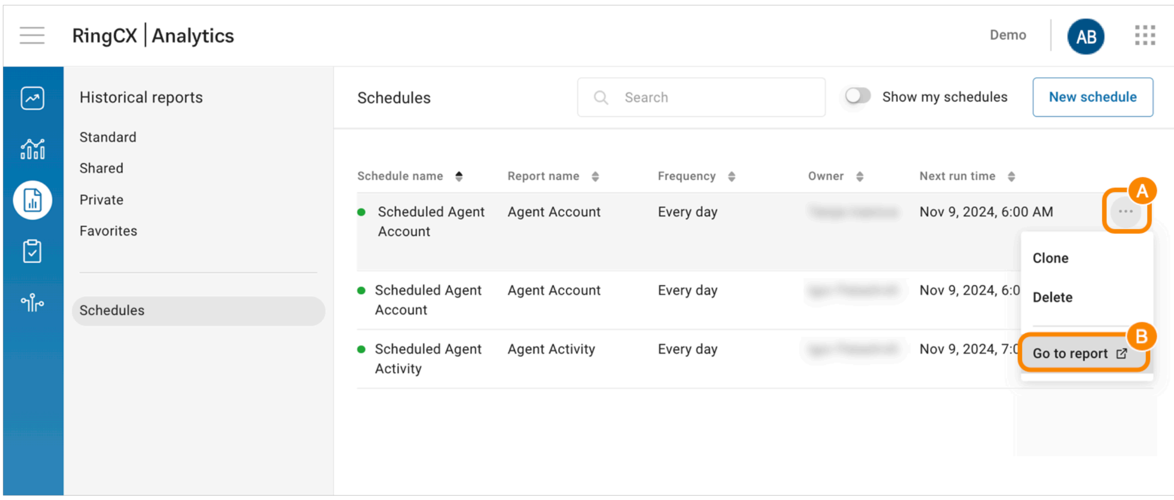
To view schedules for all scheduled Historical reports and settings for individual schedules:

1. Sign in to RingCX.
2. Click the **Analytics** tile.
3. Click the **Historical reports** icon in the left navigation bar, then click **Schedules**.

4. On the Schedules view page, you'll see the following details for any scheduled reports:
    - Schedule name
    - Report name
    - Frequency
    - Owner
    - Next run time
5. Locate a specific schedule using one of these methods:
    - Type the schedule name in the search bar. (A)
    - Click the **Show my schedules** toggle to the right of the search bar. (B)



6. From the Schedules view page, you can:
    - Click the schedule name to open settings for an individual schedule.
    - Open the Historical report for which the schedule is created:
        a. Click the **Actions** icon in the report schedule's row. (A)
        b. Select **Go to report**. (B)

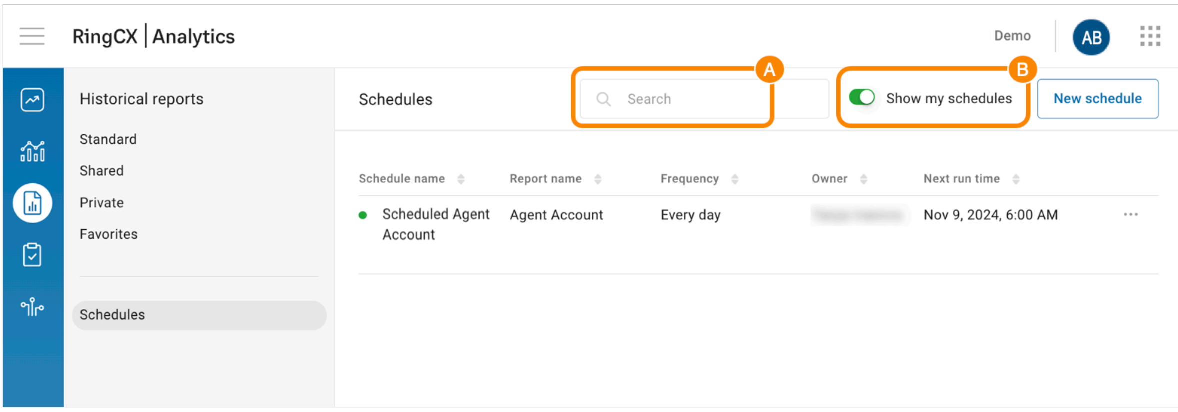


Editing existing schedules

You can only edit the schedules that you created yourself.

To edit a schedule:

1. Sign in to RingCX.
2. Click the **Analytics** tile.
3. Click the **Historical reports** icon in the left navigation bar, then click **Schedules**.
4. Locate the schedule using one of these methods:
    - Type the schedule name in the search bar. (A)
    - Click the **Show my schedules** toggle to the right of the search bar. (B)



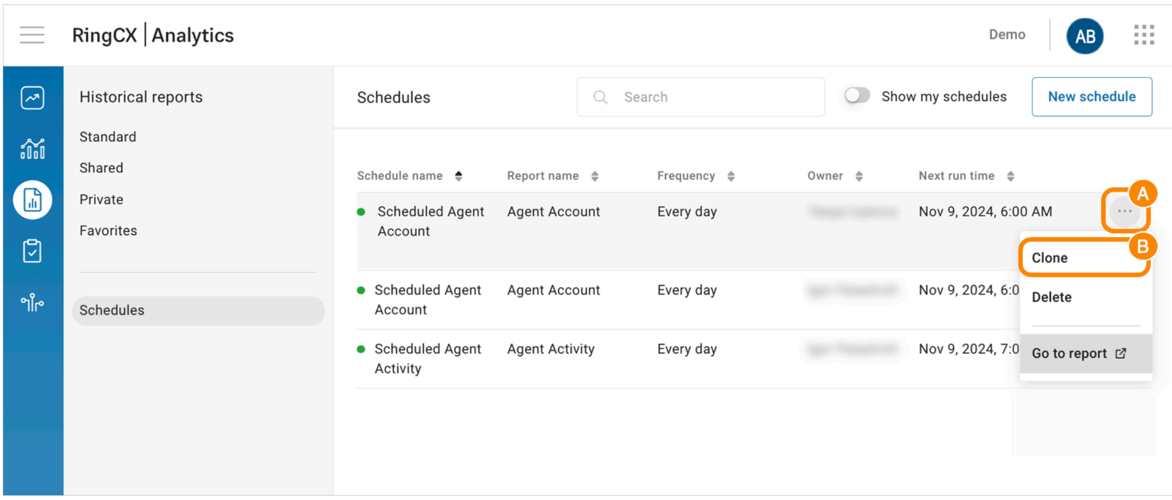
5. Click the name of your scheduled Historical report to open the schedule.
6. On the settings page, edit the settings you want to change.
7. In the **Destination** section, click the **Test run** button to verify settings and credentials in your schedule. You can also test your schedule later.
8. Click **Save**.

Cloning existing schedules

To save time when creating a new schedule, you can clone the schedule that you or someone else previously created.

To clone a schedule:

1. Sign in to RingCX.
2. Click the **Analytics** tile.
3. Click the **Historical reports** icon in the left navigation bar, then click **Schedules**.
4. Locate the scheduled Historical report using one of these methods:
    - Type the schedule name in the search bar.
    - Click the **Show my schedules** toggle to the right of the search bar.
5. Click the **Actions** icon in the report schedule's row (A), then select *Clone* (B).



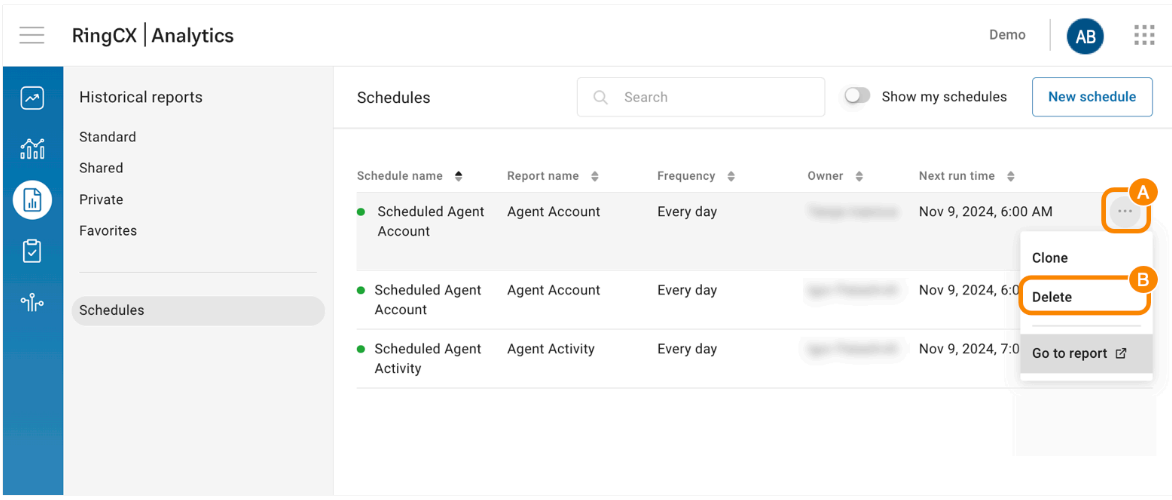
6. In the **Clone schedule** window:
    - Select the historical report you want to clone.
    - Enter a name for the new schedule. The default name is **Clone of: Scheduled report name**.
7. Click **Save**.
8. On the settings page of the cloned report schedule, change any settings as necessary for the new schedule.
9. In the **Destination** section, click the **Test run** button to verify settings and credentials in your schedule. You can also test your schedule later.
10. Click **Save**.

Deleting schedules

You can only delete the schedules that you created yourself.

To delete a schedule:

1. Sign in to RingCX.
2. Click the **Analytics** tile.
3. Click the **Historical reports** icon in the left navigation bar, then click **Schedules**.
4. Locate the schedule using one of these methods:
    - Type the schedule name in the search bar.
    - Click the **Show my schedules** toggle to the right of the search bar.
5. Click the **Actions** icon at the far right of the report's row (A), then select *Delete* (B).



6. Click **Delete** to confirm.