RingCentral for Archiver

Admin Guide







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Introduction

About RingCentral Archiver

RingCentral Archiver is introduced to enable our users to archive their RingCentral Call data (Call Recording, Voicemails, Fax, SMS) to any external storage supported by Archiver products (GDrive, Box, DropBox and SFTP).

About this Guide

This Administrator Guide focuses on how to successfully configure Archiver access for your organization as **an Admin Portal Administrator**.

- Enable Archiver
- · Create custom roles for Archiver as needed

Please refer to User Guide on how to sync your RingCentral data to a cloud storage of your choice:

https://netstorage.ringcentral.com/guides/archiver.pdf

User Notice

By using the RingCentral Archiver, you acknowledge that you have read and agree to our Terms of Service and Privacy Policy.

• TOS:

https://www.ringcentral.com/legal/last-update-October-15-2019

/eulatos.html

• Privacy Policy:

https://www.ringcentral.com/legal/last-update-March-3-2021/p rivacy-notice.html

• Archiver overview with data retention policy:

https://support.ringcentral.com/article/8913.html

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Configure Archiver Access

Enable Archiver

Archiver access can be enabled for administrators and/or for all users. Log in <u>https://service.ringcentral.com</u> with **Admin Portal administrator account**, switch to Admin Portal from the dropdown on the top right corner and find Archiver Settings in More -> Account Settings -> Archiver Settings (Figure 1). On the Archiver Setting tab, administrators can turn on Admin Archiver and/or User Archiver as needed.

• Admin Archiver: Turn on the toggle of Admin Archiver, pre-defined roles Super Admin and Manager will be able to access and archive data for the entire organization. Custom roles with proper permissions can access and archive account data as well (page 7).

• User Archiver: Turn on the toggle of User Archiver, all users can access archiver and archive their own data.

RingCentral		Admin Portal 🗸 🎬 SN
Home Users Phone System	Meetings V Reports V Billing More	Admin Portal My Extension
Service Console Account Audit Trail	Settings » Archiver Settings	
Service Status	dmin Archiver dmins, Manager pre-defined role can archive account data. You can also create new custom roles with permissic	on to archive account data or restrict access.
Account Settings Appearance All users	ser Archiver	
Archiver Settings		
Directory Integration Multi-Site Settings		
Gecurity and Compliance ≻		
Apps and App		



Admin level archiving Roles and Permissions

Users assigned with predefined **Manager** and **Super Admin** roles can access Archiver and archive data for the entire company. Administrators of Admin portal can also create custom roles and grant necessary permissions for admin archiving. Log in https://service.ringcentral.com with **Admin portal administrator account**, switch to Admin Portal from the dropdown on the top right corner and find Users -> Roles and click on + New Role to create custom roles (Figure 2).

RingCentral				Admin Portal ~ III SN
Home Users Phone S	System Meetings ~ Reports ~	Billing More		Admin Portal My Extension
🙎 User List 🗸 🗸	Roles			
Users with Extensions Unassigned Extensions	Roles give admins the ability to control what use Standard (International) is assigned to new us	ers can do within the system. A role ers by default.	is a collection of permissions which co	ould be based on a job function.
a Roles	Search Q			+ New Role
(a) User Groups	Role Name ~	Type of Role	Description	
A= Templates >	Billing Admin	Predefined	Billing functions plus Standard Intern	national and Manager functions.
	copy for standard with company level call re	Custom		
	Manager	Predefined	Company reporting functionality plus	Standard International.

Figure 2

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Admin Portal 🗸

Tick and save the permissions below to ensure custom roles have sufficient privileges for admin archiving (Figure 3).

- Features Archiver for Admins
- Company Call Log Access Recordings
- Company Call Log Delete Records
- Company Call Log Download & Delivery
- Company Call Log View Only
- User Management Users

RingCentral

Home Users Phone System	Meetings ~ Reports ~ Billing More		
< Back	copy for standard with company l	level call recording	Sec. Edit
Overview Assigned Users	Name copy for standard with company level call recording Type of Role: Custom () Set as Default	Description	
	Permissions General Overview, Messages, Contacts, Standard User Tools Policies		^
	 Ponces Domestic Calls Internal Calls 		

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Afterwards, go to the Assigned Users tab and click on + Assign User to assign the custom role to user(s) as needed (Figure 4).

RingCentral							Admin Portal 🗸 🎆 SN
Home Users Phone S	System	Meetings ~ R	eports ~	Billing More			
< Back		cot	by for stand	dard with company level	call record	ng	
Overview Assigned Users	Sea	rch	QDep	artment ~			+ Assign User
		Name	~	Number	Ext.	Department	Actions
		John Doe702		+1 (206) 4513020	103		Remove

Figure 4



Extension level archiving Roles and Permissions

Users who archive call recordings at extension level need to be assigned to a role with sufficient permissions by the admin portal administrator. Otherwise, extension users cannot archive his or her call recordings.

All predefined roles include required permissions for extension archiving. Administrators of Admin portal can also create custom roles and grant necessary permission for extension level archiving. Log in https://service.ringcentral.com with administrator account, switch to Admin Portal from the dropdown on the top right corner and find Users -> Roles and click on + New Role to create custom roles (Figure 2).

Please ensure the permissions below are ticked in the custom role (Figure 5). Then go to the Assigned Users tab and click on + Assign User to assign the custom role to user(s) as needed (Figure 4).

User Call Log

User Call Log
 User Call Log - Access Recordings
 User Call Log - Delete Records
 User Call Log - Download & Delivery
 User Call Log - View Only

Figure 5



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System Requirements

System Requirements

The following browsers are supported by RingCentral for Archiver:

- Microsoft Edge 38+ (Windows 10)
- Firefox46[°]+(Windows[°],Mac[°])
- Chrome[™] 50 + (Windows,Mac)
- Safari[®] 9.1+(Mac)

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General Questions

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1. Why can't I find Archiver Settings in the Admin Portal?

If the Archiver Setting tab cannot be found in More -> Account Settings -> Archiver Settings, please ensure that

- The plan your organization subscribed includes Archiver feature
- You log in Admin Portal as an admin portal administrator
- You are in the Admin Portal but not in My Extension. You can simply switch it by clicking the dropdown on the top right corner

If the Archiver Setting tab is still not available after the verification, please contact RingCentral Support for help.

2. Why cannot users see Archiver after I turned on User Archiver in Archiver Settings?

Please suggest the users to go to My Extension (not Admin Portal) to find **More -> Apps and Resources -> Archiver**. More details please refer to the User Guide.

3. Why cannot archiver administradors see Archiver after I turned on Admin Archiver in Archiver Settings?

Please ensure the user's assigned role includes these permissions blow:

- Features Archiver for Admins
- Company Call Log Access Recordings
- Company Call Log Delete Records
- Company Call Log Download & Delivery
- Company Call Log View Only
- User Management Users

If roles are properly configured, please suggest the archiver admin to go to Admin Portal (not My Extension) to find **More -> Apps and Resources -> Archiver**. For more details, please refer to the User Guide.



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4. Why does the Archiver Administrator see an error that "Call recordings for all extensions couldn't be backed up" in the Sync Options tab though the Call Recordings for All Extensions is selected (Figure 6)?

The Archiver administrator sees this error because the admin does not have sufficient permissions to access the company's call recordings. Please ensure all permissions listed in question 3 are selected and saved in the archiver administrator's assigned role. Otherwise, the call recordings for all extensions cannot be archived though it has been selected.

Accounts Sync	Options Archive Logs ~		
You don't have the pe	mission to back up all your selected data	a. Find out how to fix it ×	
Turn On Backup			
Select the Data You	Want to Back Up		
All Extensions	Only Y	our Extension	
Call Recordings	Call recordings for all extensions co uldn't be backed up. In your Admin Portal, go to Users > Roles and make sure all permission s under Company Call Log are sele cted.	ecordings nails VMS Messages	
		Save	

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5. Why does the archiver extension user see an error that "Call recordings for your extensions couldn't be backed up" in the Sync Options tab (Figure 7) though the Call Recordings data type is selected?

The extension user sees this error because the user does not have sufficient permissions to access his or her call recordings. Please ensure User Call Log permission is selected in the user's assigned role (page 10). Otherwise, the call recordings for the user's extension cannot be archived.

We retain data up to 80 days or 9, our <u>data retention policy</u> . Archive logs are retained for up to data in Call Log.	000 call recordings. Customers must archive data to external storage to prevent data loss or compliance risk. For more information, 6 months; logs that reach their retention period will be permanently deleted. You will still have self-service access to 1 year of call lo	read)g
Accounts Sync Options	Archive Logs 🗸	
You don't have the permission to	back up all your selected data. Find out how to fix it	×
Turn On Backup		
Select the Data You Want to	Back Up	
Call Recordings ()		
Voicemails		
SMS/MMS Messages		
FAX		

Save

Figure 7

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