

RingCentral for Archiver

Admin Guide



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Introduction

About RingCentral Archiver

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

About this Guide

This Administrator Guide focuses on how to successfully configure Archiver access for your organization.

- Enable Archiver
- Create custom roles with Archiver Administrator permission

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 for Dropbox integration app, 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/privacy-notice.html>

- Archiver overview with data retention policy:

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

Configure Archiver Access

Enable Archiver

Archiver access can be enabled for administrators and/ or for all users. Log in <https://service.ringcentral.com> with **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 archiver and save data for the entire organization. Custom roles can be created with permissions to access and archive account data as well.
- User Archiver: Turn on the toggle of User Archiver, all users can access archiver at extension level and archive their own data.

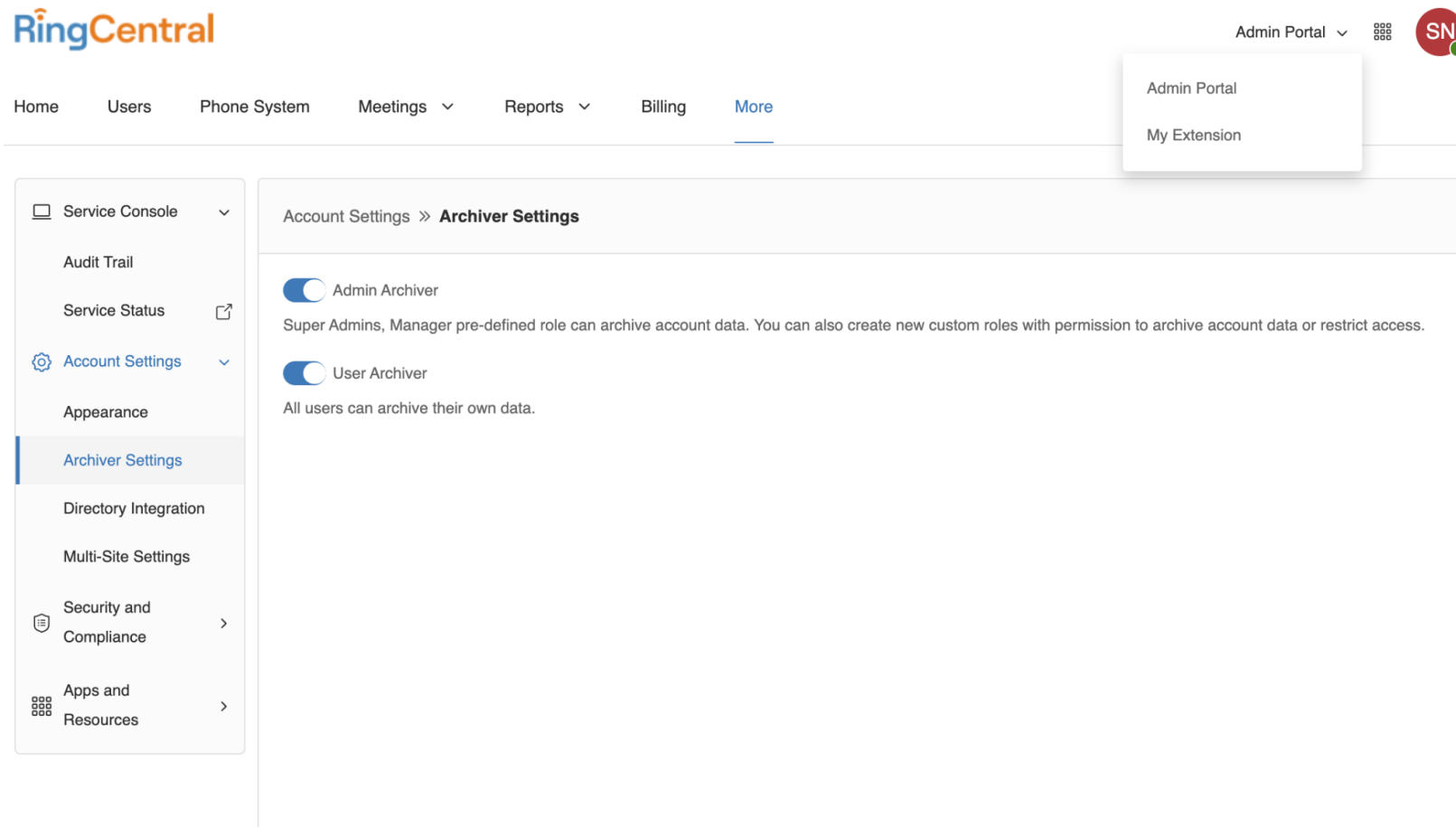


Figure 1

Create custom roles with Archiver Admin permission

After turning on the toggle of Admin Archiver in the Archiver Settings tab, administrators can create custom roles and grant Archiver Admin permission. Log in 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).

The screenshot shows the RingCentral Admin Portal interface. At the top, the RingCentral logo is on the left, and the user profile 'SN' is on the right. A navigation bar contains 'Home', 'Users', 'Phone System', 'Meetings', 'Reports', 'Billing', and 'More'. A dropdown menu is open over the 'Users' link, showing 'Admin Portal' and 'My Extension'. On the left, a sidebar menu has 'Roles' selected. The main content area is titled 'Roles' and contains a search box, a '+ New Role' button, and a table of roles.

Role Name	Type of Role	Description
Billing Admin	Predefined	Billing functions plus Standard International and Manager functions.
copy for standard with company level call re...	Custom	
Manager	Predefined	Company reporting functionality plus Standard International.

Figure 2

Please tick and save the permissions below to ensure custom roles have sufficient privileges for admin archiving (Figure 3). Otherwise, users cannot see the Admin Archiver UI or cannot choose corresponding data type at company level archiving.

- 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

The screenshot shows the RingCentral Admin Portal interface. At the top left is the RingCentral logo. On the right, there is a user profile for 'SN' with a red circle icon. Below the logo is a navigation menu with items: Home, Users (highlighted), Phone System, Meetings, Reports, Billing, and More. The main content area is titled 'copy for standard with company level call recording' and includes a 'Back' link and an 'Edit' button. On the left side of the main area, there is a sidebar with 'Overview' (selected) and 'Assigned Users'. The main configuration area has two columns: 'Name' and 'Description'. The 'Name' field contains 'copy for standard with company level call recording'. Below this, the 'Type of Role' is set to 'Custom' with a help icon, and there is an unchecked checkbox for 'Set as Default'. The 'Permissions' section is expanded, showing 'General' and 'Policies' categories. Under 'General', 'Overview, Messages, Contacts, Standard User Tools' is checked. Under 'Policies', 'Domestic Calls' and 'Internal Calls' are both checked.

Figure 3

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

The screenshot shows the RingCentral Admin Portal interface. At the top, there is a navigation bar with the RingCentral logo on the left and 'Admin Portal' with a user profile icon (SN) on the right. Below the navigation bar, there are several menu items: Home, Users (which is highlighted with a blue underline), Phone System, Meetings (with a dropdown arrow), Reports (with a dropdown arrow), Billing, and More. The main content area is titled 'copy for standard with company level call recording'. On the left side of this area, there is a sidebar with two tabs: 'Overview' and 'Assigned Users' (which is selected). The 'Assigned Users' tab contains a search bar, a 'Department' dropdown menu, and a '+ Assign User' button. Below these elements is a 'Remove' button with a trash icon. A table lists the assigned users with columns for Name, Number, Ext., Department, and Actions. One user is listed: John Doe702, with a phone number of +1 (206) 4513020... and extension 103. The 'Actions' column for this user has a 'Remove' link.

<input type="checkbox"/>	Name	Number	Ext.	Department	Actions
<input type="checkbox"/>	John Doe702	+1 (206) 4513020...	103		Remove

Figure 4

System Requirements

System Requirements

The following browsers are supported by RingCentral for Archiver:

- Microsoft Edge 38+ (Windows 10)
- Firefox[®] 46+ (Windows[®], Mac[®])
- Chrome[™] 50+ (Windows, Mac)
- Safari[®] 9.1+ (Mac)

General Questions

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 you purchased includes Archiver feature
- You log in Admin Portal as an 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 verification, please contact RingCentral Support for help.

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

Please suggest 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 administrators see Archiver after I turned on Admin Archiver in Archiver Settings?

Please verify if the user's assigned role includes these permissions below:

- 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 admins to go to Admin Portal (not My Extension) to find More -> Apps and Resources -> Archiver. For more details, please refer to the User Guide.

4. Why are the data types for All Extensions in the Sync Options tab disabled for Archiver administrators?

Please ensure all permissions listed in question 3 are selected and saved in the assigned roles. Otherwise, archiver admin may not be able to see Archiver UI or access data at corporation level.