RingCentral Meetings™

Admin and User Setup Guide

RingCentral®

Getting Started

Overview of RingCentral Meetings

RingCentral Meetings is a fully integrated cloud meetings, sharing, and team collaboration solution that empowers you to seamlessly connect with anyone, anywhere.

The integration of RingCentral Meetings with RingCentral Glip team messaging allows organizations and teams to collaborate more effectively. Also, RingCentral Rooms and Room Connector are available add-ons to meet your conference room needs.

This guide describes how to configure RingCentral Meetings through your online account.

Related Documentation

You can learn more about RingCentral Meetings admin and user features through knowledgebase articles and the following RingCentral documentation:

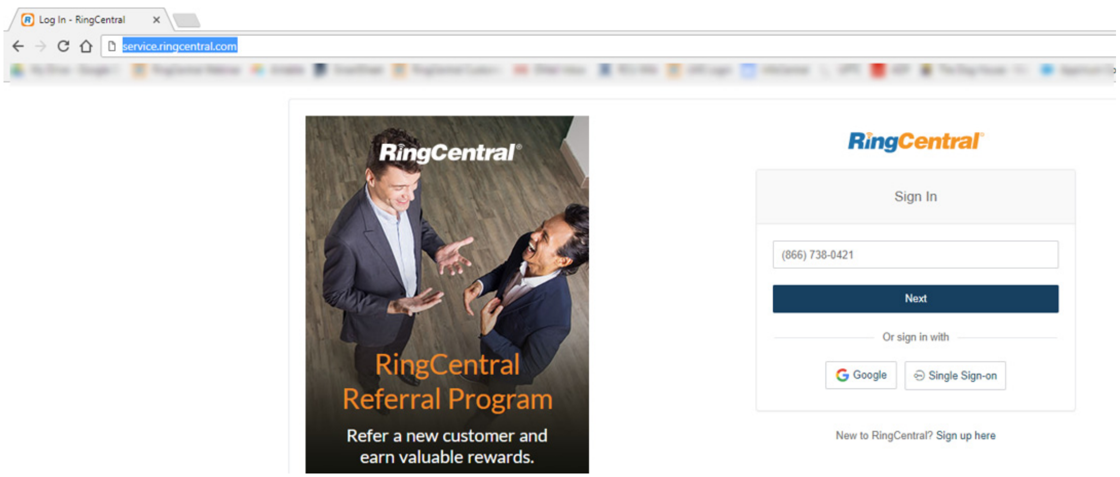
- For more information on hosting or participating in video meetings using RingCentral Meetings, see the *RingCentral Meetings User Guide*.
- For more information on collaborating with your teams using RingCentral Glip, see the *RingCentral Glip online user guide*.
- RingCentral Meetings is also available with RingCentral Office as a complete unified communications solution. See the *RingCentral Office Admin Guide* for more information.

Accessing your Online Account

Your online account is a browser user interface that allows you to manage and configure RingCentral Meetings for your company and view reports on your usage and scheduled meetings.

Logging in to your Online Account

To access your online account:

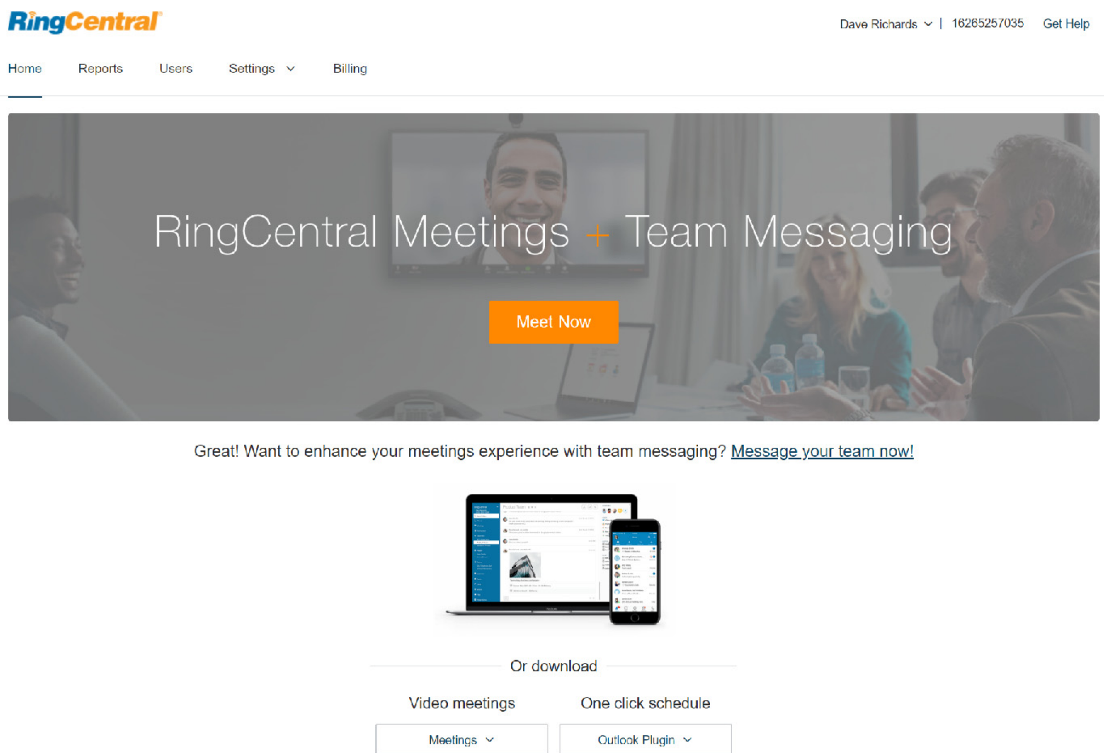


Enter https://service.ringcentral.com into your browser's address bar, and log in with your email and password. Or if you use Google login or Single Sign-On, select this option. For more information on RingCentral sign in options, see the *RingCentral Office Admin Guide*.

Home Page

On the home page, you have the option to download the desktop applications for RingCentral Meetings, RingCentral Glip, as well as the RingCentral Meetings Microsoft Outlook plug-in. To download Meetings, select the operating system of your device or desktop. To download the RingCentral Meetings Microsoft Outlook plug-in

To use RingCentral Meetings or RingCentral Glip, click **Meet Now** or **Message your Team Now**. Or, begin managing your online account. See Overview of Your Online Account.



Overview of Your Online Account

As a RingCentral Meetings customer, you have direct control over the configuration of your settings and users. Administrators (“Admin Users” in your online account) can configure account or user level settings, and manage users and licenses. Users (“Standard Users” in your online account) can set their own user settings to control the meetings they host.

Within the RingCentral online account, you can:

- Download RingCentral applications and plug-ins. See “Downloading Applications” on page 5.
- Learn how to set up and use your free Meetings account, or request access from your admin to a paid account. See “Meetings Accounts” on page 7.
- View Reports and Dashboards. If you are on the Essentials or Advanced plans, you can generate detailed individual and company reports. See “Meetings Reports” on page 11.
- Add users and update their settings. See “Set up RingCentral Meetings User Accounts” on page 21.
- Configure company and individual settings for RingCentral Meetings. See “Meetings Settings” on page 29.
- Review your subscription (including assigned licenses) and billing for RingCentral Meetings. See “Billing” on page 41.

Meetings Accounts

Getting Started with Free Accounts

Meetings is available in Free, Essentials, and Advanced Tiers to meet your business needs. The easiest way to get started with RingCentral Meetings is to sign up for free. You may want to use the free RingCentral Meetings product if your company is not ready to use the RingCentral Office cloud-based phone system, or a portion of your users only need collaboration tools.

This section describes the features of the free account and the upgrade path for free users to a paid account. Free user accounts have the following limitations.

To sign up for a free account, or upgrade to a paid account, see “Sign up for a Free Meetings Account” on page 9, and “Upgrade to a Paid Account” on page 10.

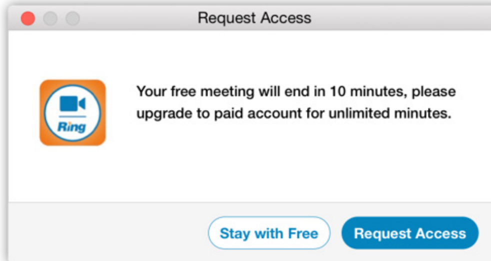
40-Minute Limit on Group Meetings

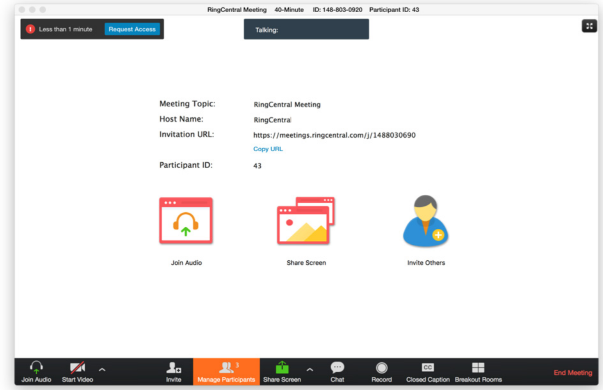
The first group meeting hosted by a free user will not have a time limit. Starting with the second group meeting hosted by a free user, the length of group meetings is limited to 40-minutes.

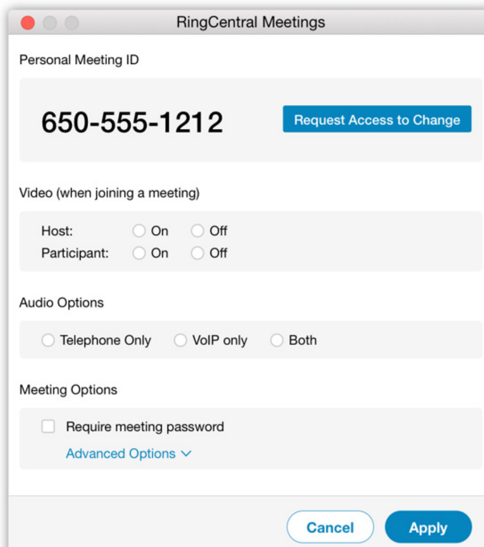
When there are ten minutes left in your meeting you will receive a notification to request access to a paid license. The meeting will end with a notification once the time limit is reached. To send a request to your administrator to upgrade, click **Request Access**.

Personal Meeting ID

Free users are assigned a fixed personal meeting ID. This ID may not be changed in a free account. Paid users may change their personal meeting ID to an ID of their choosing. To send a request to your administrator to upgrade, click **Request Access to Change**.







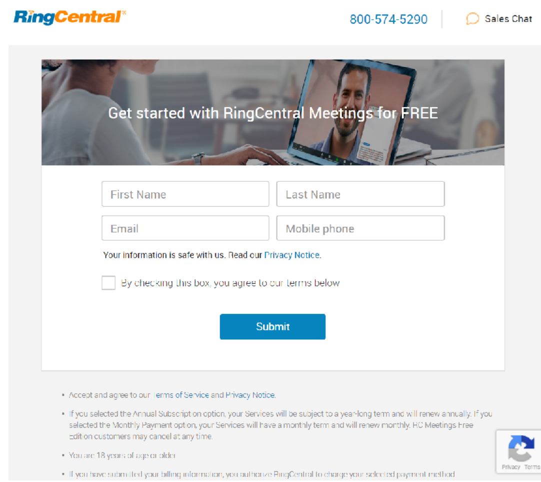
Sign up for a Free Meetings Account

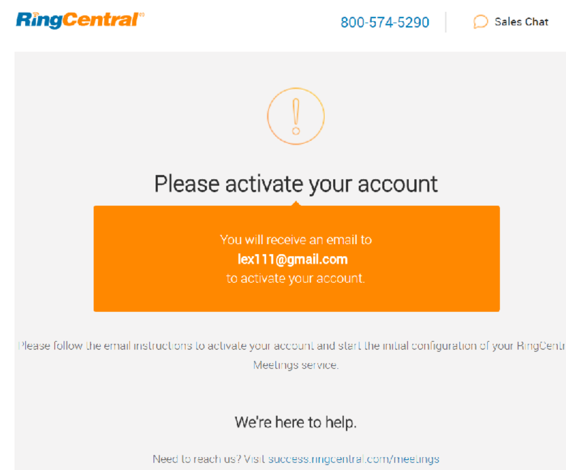
To sign up for a free account:

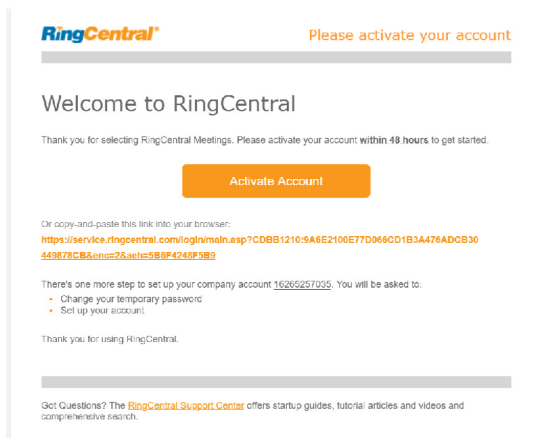
1. On the RingCentral Meetings webpage at https://www.ringcentral.com/office/features/online-meetings/overview
2. Click **Get Started for Free.**
3. Follow the instructions for sign up.
4. You receive an activation email.
5. Click the link in the activation email to launch the Meetings express setup.

In the Meetings express setup, configure your account:

1. On the **Add users to your account** page, enter the user information for each user you want to add to your Meetings account. Optionally, you can import your user information from **Google**, **Office**, or by **Bulk Upload**.
2. Click **Continue.**
3. Click **Get Started** to complete the setup.





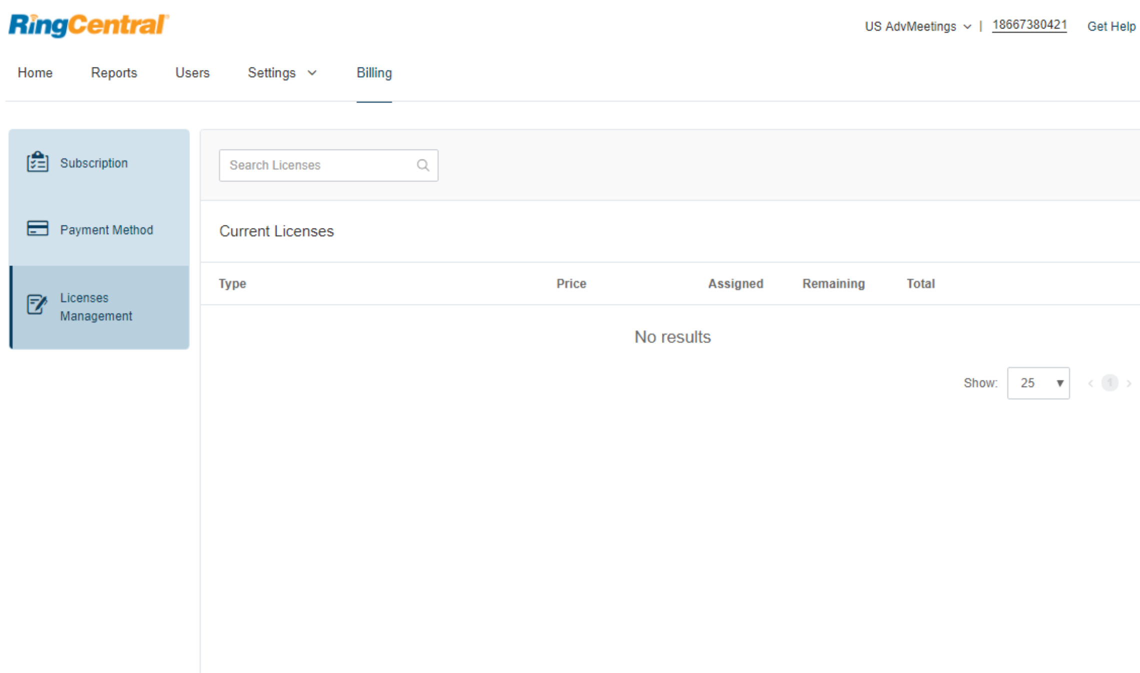


Upgrade to a Paid Account

Upgrading to a paid account provides unlimited minutes. When a user requests access, an admin may assign a license to a user, or purchase a license.

To upgrade to a paid account.

1. In the meeting interface, a Standard User clicks **Request Access** to notify and request access from their admin. The Admin User has an existing license or purchases a license for the user.
2. The admin receives a notification that the user has requested access to a paid account.
3. The admin reviews the available RingCentral Meeting licenses in the **Billing** < **Manage Licenses** section of the account. See Manage Licenses.
4. The admin may assigns a license to the user in the **User** > **User List** section of the account. See Set up RingCentral Meetings User Accounts.
5. The user receives a notification once assigned a license. Once assigned a license, the user will not have a time-limit on group meetings, and can access Meetings Reports.



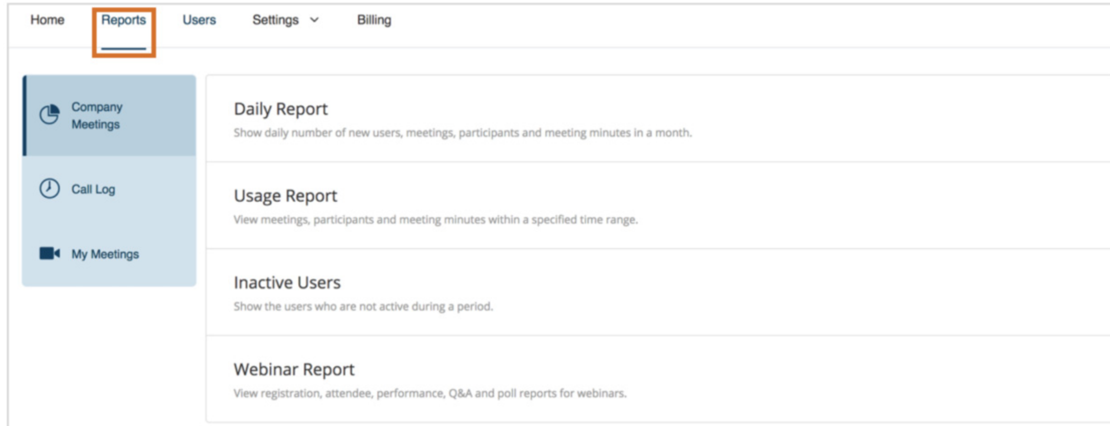
Meetings Reports

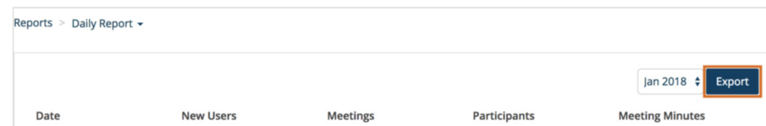
Company Meetings Reports

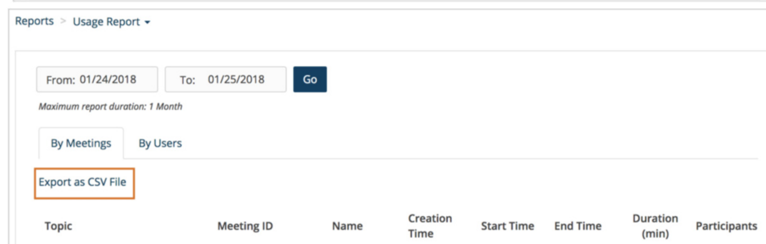
Your RingCentral Meetings account allows you to generate reports on your company meetings. The Reports feature is available only for Essential and Advanced accounts.

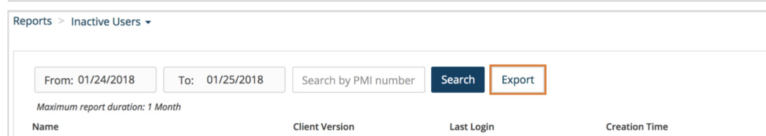
To generate reports for company meetings:

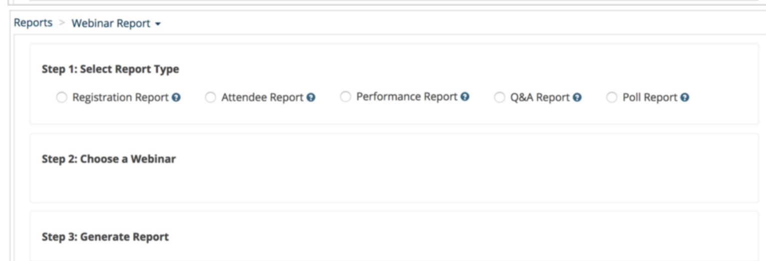
1. Once you are logged in to your company's online account, click the **Reports** link.
2. Select the type of report on the Company Meetings tab. Company reports include the following reports:
   - **Daily Report**: shows daily number of new users, meetings, participants, and meeting minutes in a month. This data is shown in chart and table format. Click **Export** to generate a CSV report file.
   - **Usage Report**: displays more detailed data on individual meetings launched within your company. It can be filtered by specific time frames, as well as by Meetings or Users. Click **Export as CSV File** to generate a report.
   - **Inactive Users**: show the users who are not active during a period. You can export this data to report on which employees are not utilizing their RingCentral Meetings applications. You may search and filter via a Personal Meeting ID (PMI) number. Click **Export** to generate a CSV report file.
   - **Webinar Report**: If you have a RingCentral Webinar license, you can also access the registration, attendee, performance, and interaction reports from this area. Follow the instructions on the page to generate a webinar report.











Meetings Dashboard

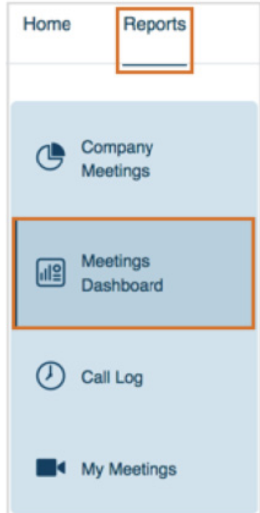
The **Meetings Dashboard** is available for administrators on our Advanced plan. The Dashboard displays a quick snapshot of the overall usage of meetings within the organization. This feature shows a graphical representation of account-wide usage data, and analyzes possible technical issues experienced during live meetings.

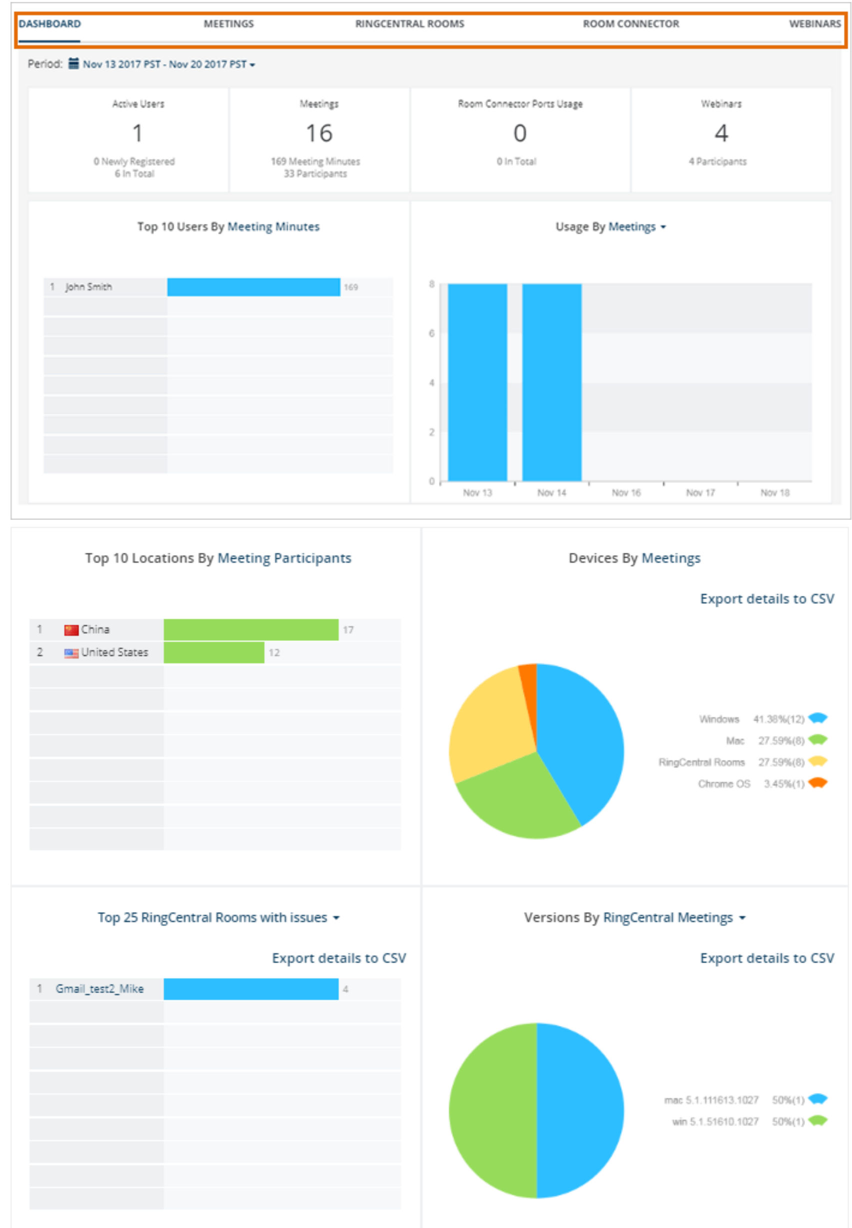
Dashboards provide the following information:

- Overview of Meetings usage in the enterprise
- All past and live meetings
- Past and live webinar information
- RingCentral Rooms usage
- RoomConnector port usage

To access the Meetings Dashboard:

1. Go to **Reports** > **Meetings Dashboard**.
2. In the Meetings Dashboard page, select a tab.
   - Dashboard
   - Meetings
   - RingCentral Rooms
   - Room Connector
   - Webinars

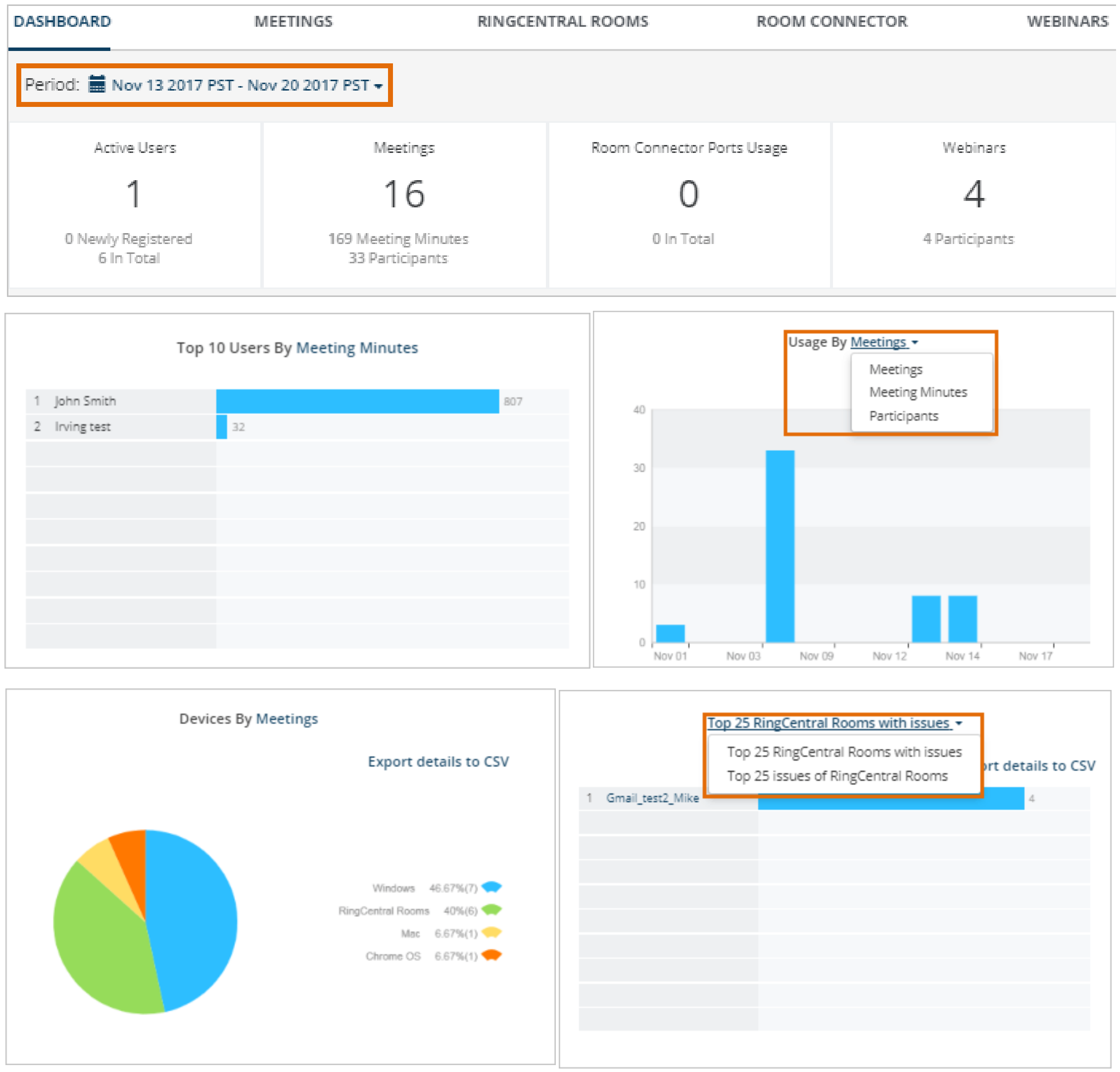




Dashboard Tab

You can filter data on Dashboard by setting the Period.

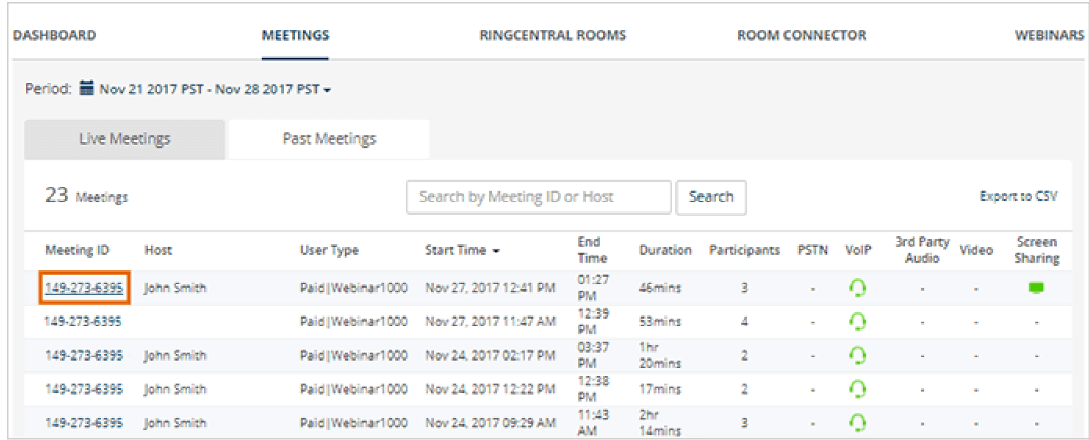
- Active Users
- Meetings
- Room Connector ports usage
- Webinars

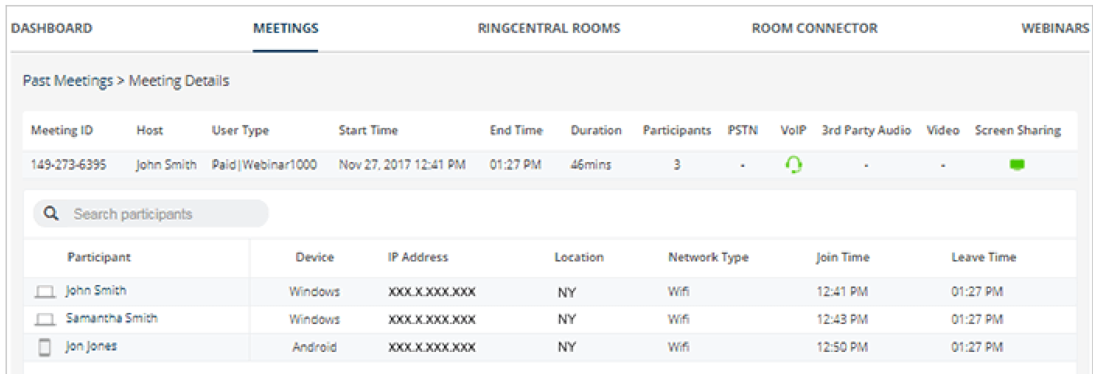


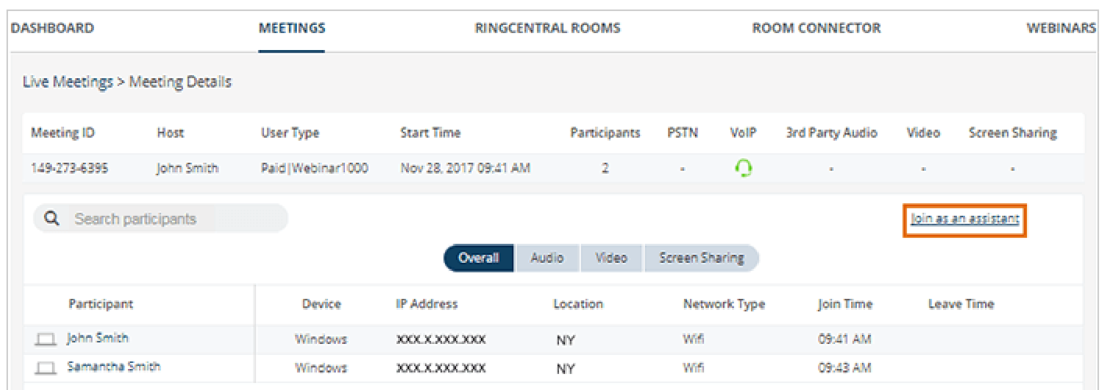
Meetings Tab

The **Meetings** tab displays the **Live** and **Past Meetings** information. Click on the **Meeting ID** to review the details of a meeting. The Meetings Details displays the Participants, Device used, IP Address, Location, Network Type, Join Time, and Leave Time.

Note: During a live meeting, an administrator may join. To join, go to the **Live Meetings** tab and click on the **Meeting ID** and **Join as an assistant**.



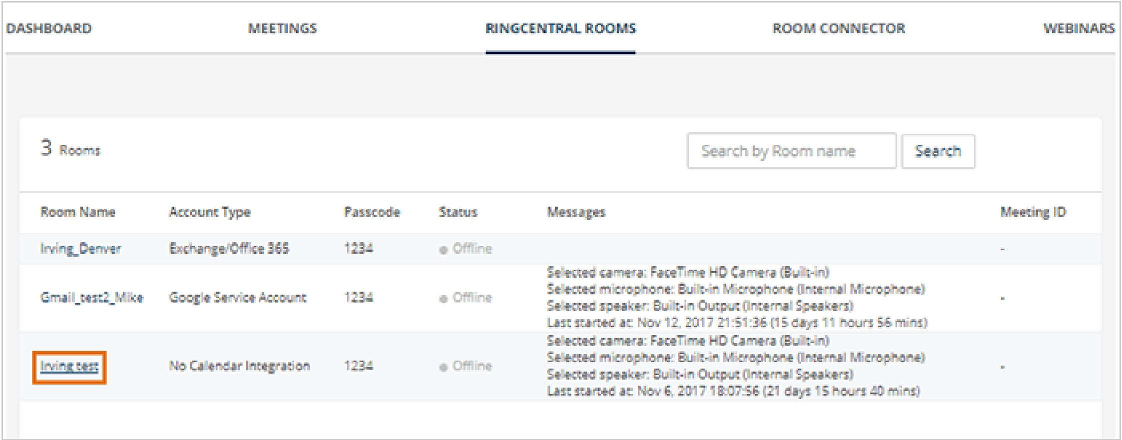


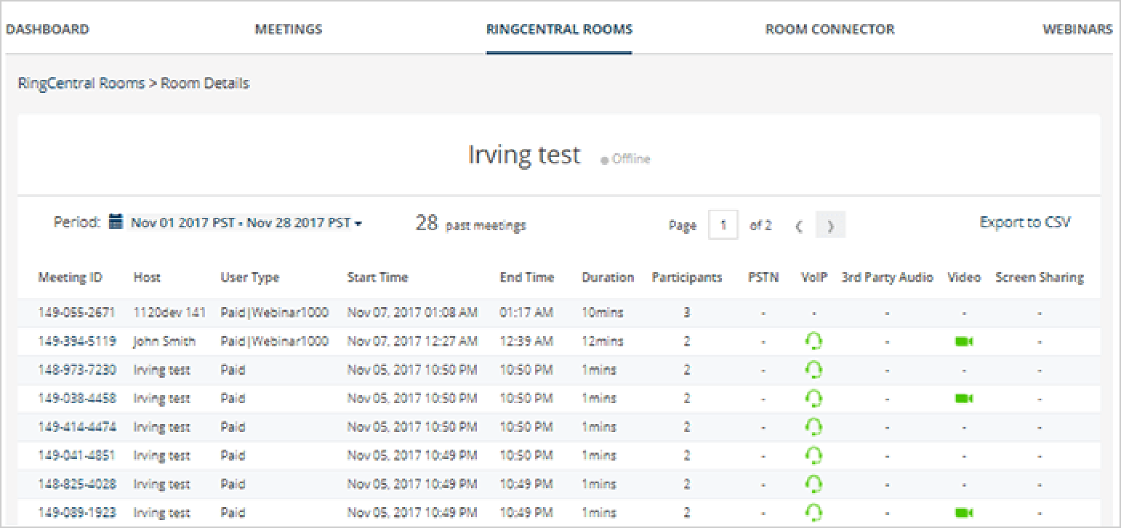


RingCentral Rooms Tab

The **RingCentral Rooms** tab displays the created rooms, including the Room Name, Account Type, Passcode, and Status, including any error messages.

Click on the **Room Name** to review the room's meeting history and the details of each meeting in the room. You can export the room details by clicking **Export to CSV**.

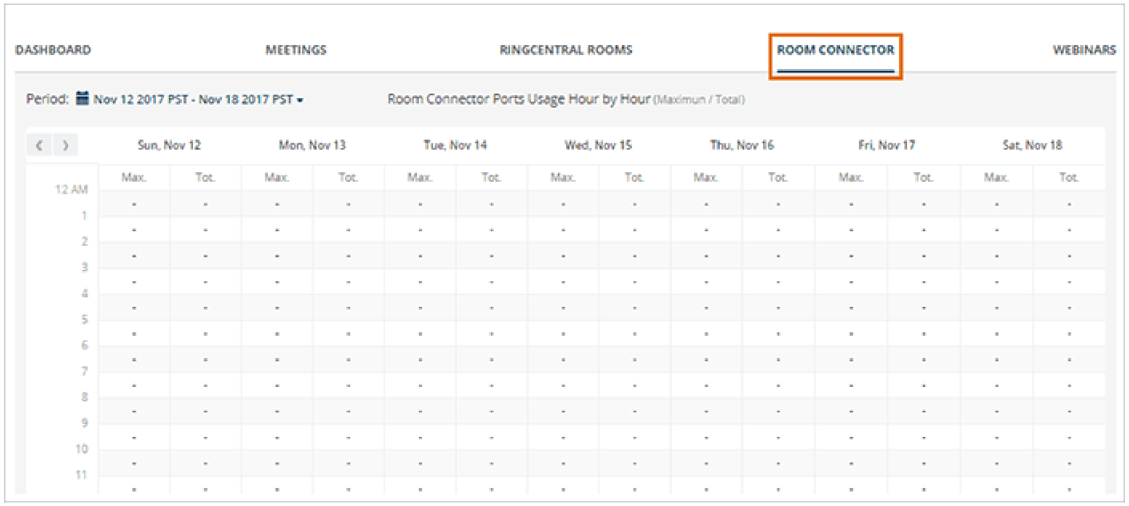




Room Connector Tab

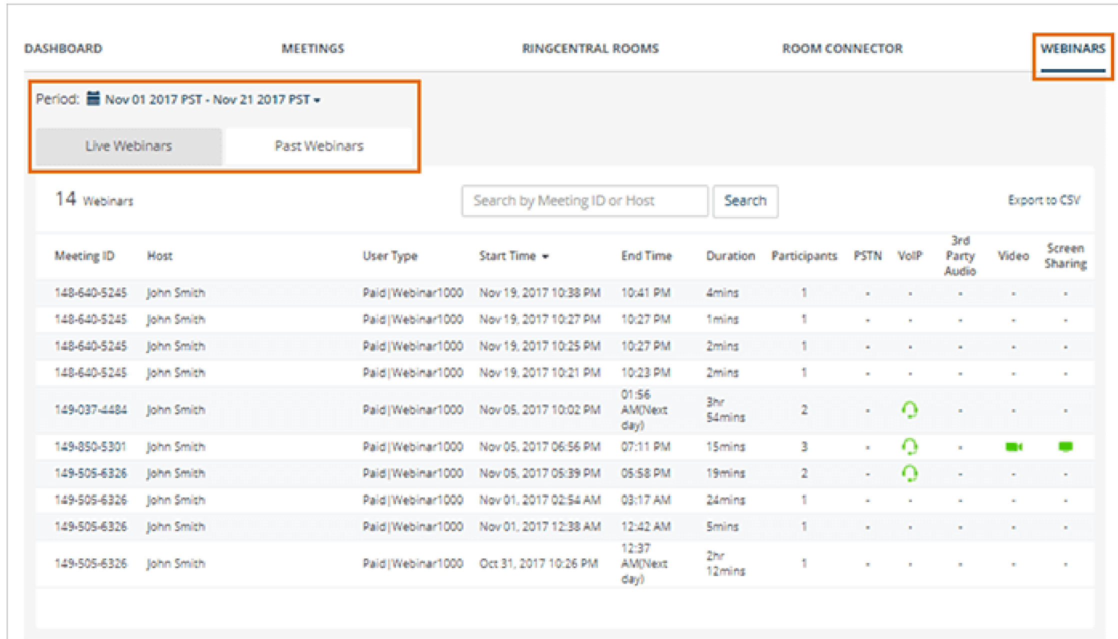
The **Room Connector** tab displays the Room Connector ports usage, hour by hour, for a selected period. You can set the **Period** from the drop-down menu.

For more information on RingCentral Room Connector, see the knowledgebase article, Getting Started with RingCentral Room Connector.



Webinars tab

The **Webinars** tab displays the information for **Live Webinars** and **Past Webinars**, including Meeting ID, Host, User Type, Start and End Time, Duration, number of Participants, type of audio, and whether video or screen sharing was used during the webinar. You can export the Webinar report by clicking **Export to CSV**.



Call Log

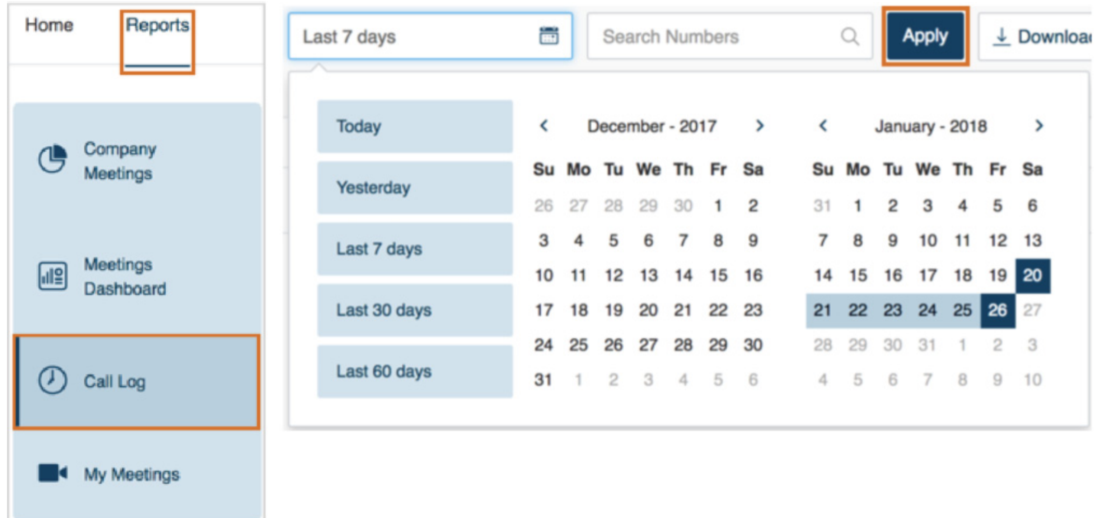
For customers who have the Call Me and Call Out features enabled on their RingCentral Meetings account, the **Call Log** option will track when these features are used. A participant joining a meeting can choose the Call Me feature to seamlessly join a meeting's audio conference. A host can use the Call Out feature to invite participants to join a RingCentral Meeting with their phones.

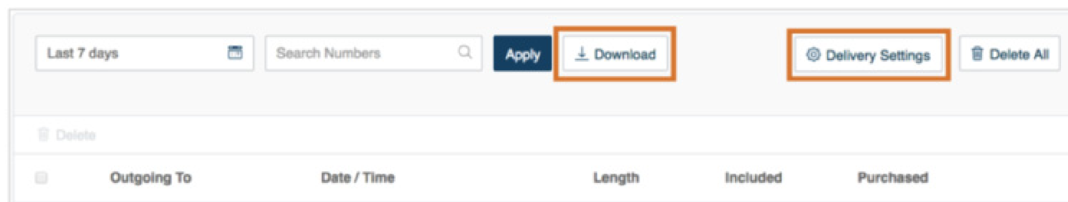
When these features are used, the call minutes will be recorded like a regular phone call on the meeting host's account. If you do not want your employees to use these features for international calls, you can monitor the use here in the **Call Log**.

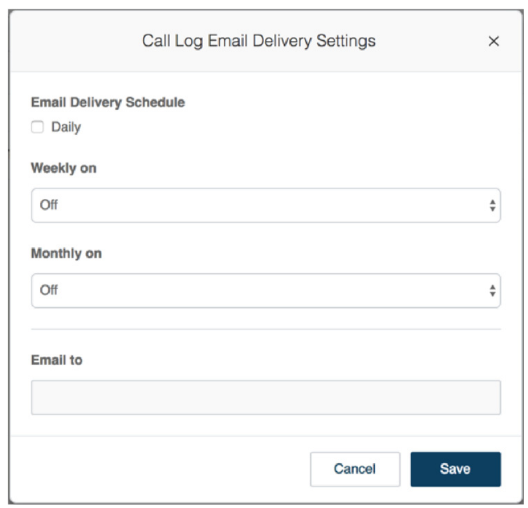
To generate call log reports:

1. On the **Reports** tab, select **Call Log**.
2. Filter the report duration. You have the option to search and filter specific numbers.
3. Click **Apply** to run the report with your settings.
4. Click **Download** to download a .csv of the report.

You can automate the Call Log report to be sent to your email by selecting **Delivery Settings**. You may set it to send daily, weekly (set which day of the week), or monthly (set the date). On the space provided, enter the email address where the report will be sent.







My Meetings

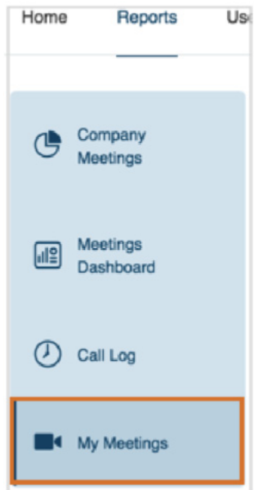
The **My Meetings** feature provides individual users the option of generating their own personal meetings reports. Administrators can access their own details in this area under the **Reports** section of the online account. End users can find the feature in their online accounts if they have been assigned a Meetings license.

The reports produced in this area include information on type of meetings launched, time spent in the meeting, and who attended. The results can be filtered by date with up to one month of data.

To generate a personal usage report:

1. On the **Reports** tab go to My Meetings.
2. Set the duration and click **Go**.

The report will be generated on the page. You can click **Export as CSV File** to download a report of your meetings.

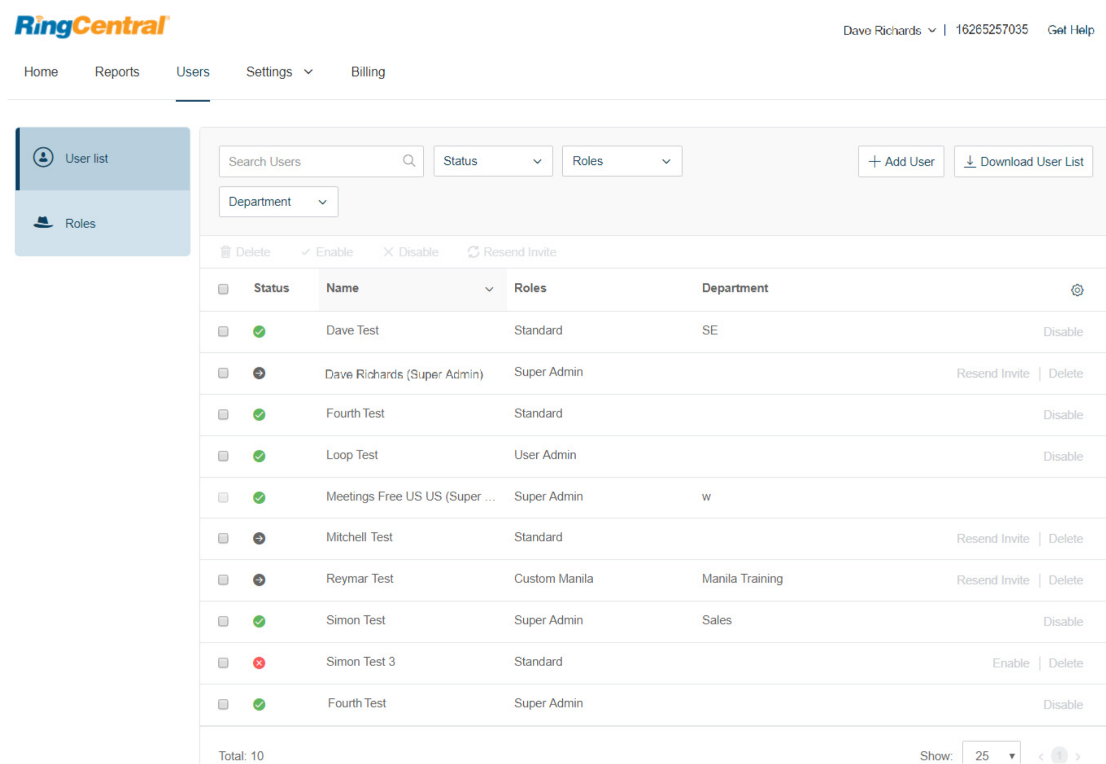


Set up RingCentral Meetings User Accounts

Managing Users in Your Account

The User List displays all of the user accounts you have created. From this area, you can:

- Add new user accounts
- Delete, Enable, and Disable existing users, as well as re-send welcome emails to individuals to activate their accounts
- Download a list of user information
- Assign and unassign Meetings licenses



Assign Licenses

Users activated in your account automatically receive basic RingCentral Meetings and Glip access. However, if you would like to grant them access to an unlimited or large RingCentral Meetings license, you may do from the User List. If you have purchased RingCentral Webinar, that access can also be assigned.

Add Users

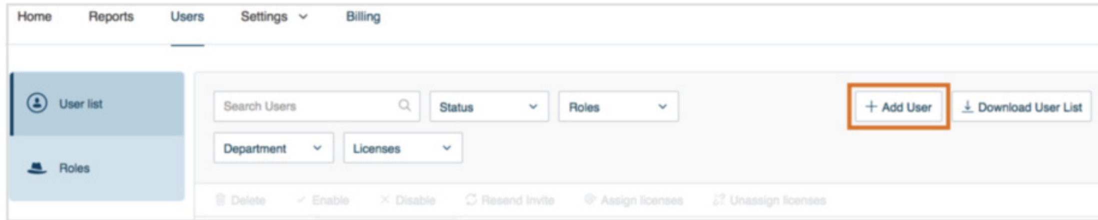
You may add users to your RingCentral Meetings online account by the User List under the Users menu.

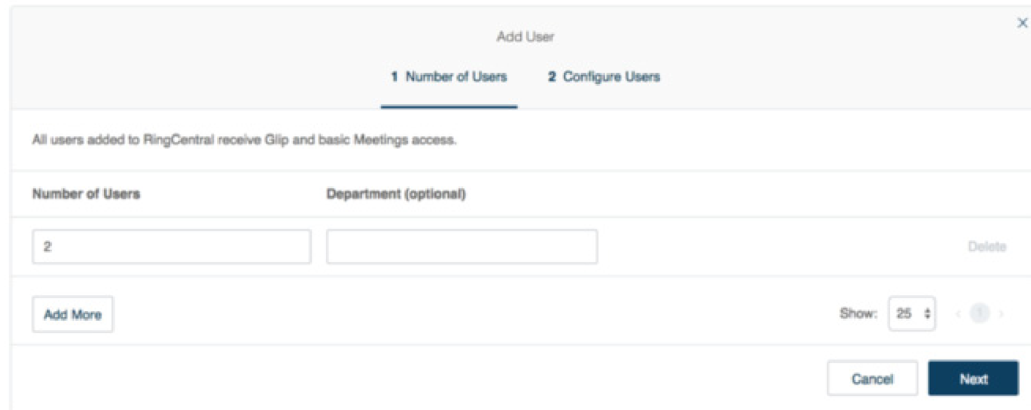
To create users in your online account:

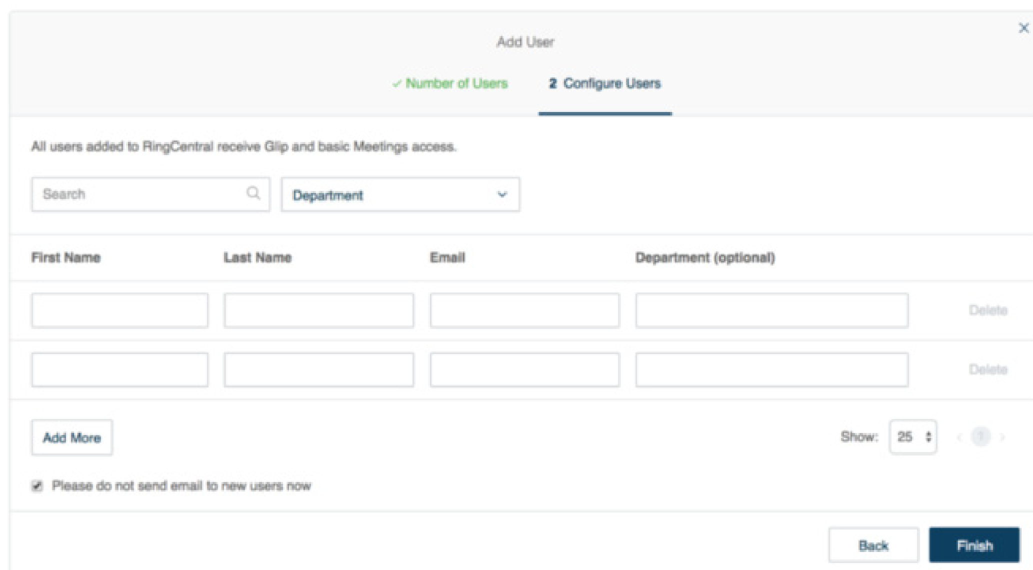
1. Select **User List** under the **User** menu.
2. Enter the number of users per department. Click **Add More** if you need more space for additional departments. Click **Next**.
3. Enter the user details: name and email. Click **Add More** if you want to add more users. You have the option to send an email to the new users or skip sending the email by checking the box **Please do not send email to new users now**.
4. Click **Finish**.

A notification window will appear that you have successfully added the users and you will be redirected to the user list page.

Note: the *Standard (International)* role will be assigned to the new users by default.





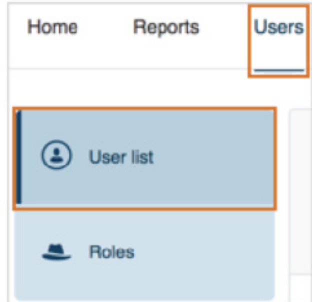


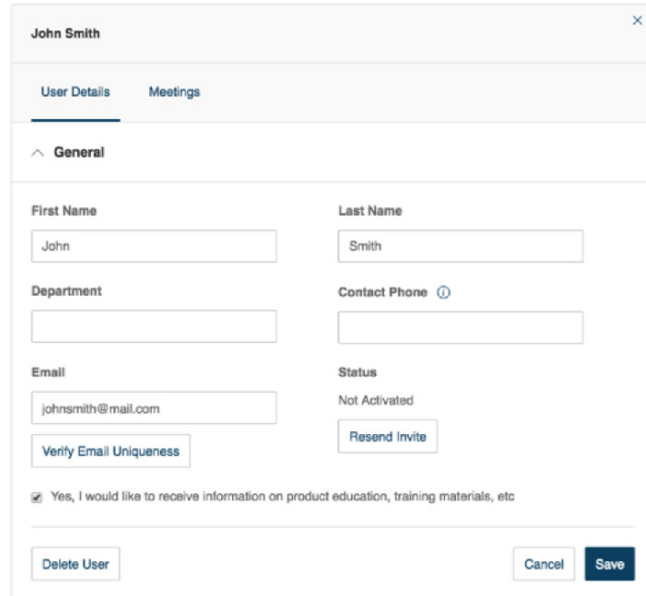
Configure User Details

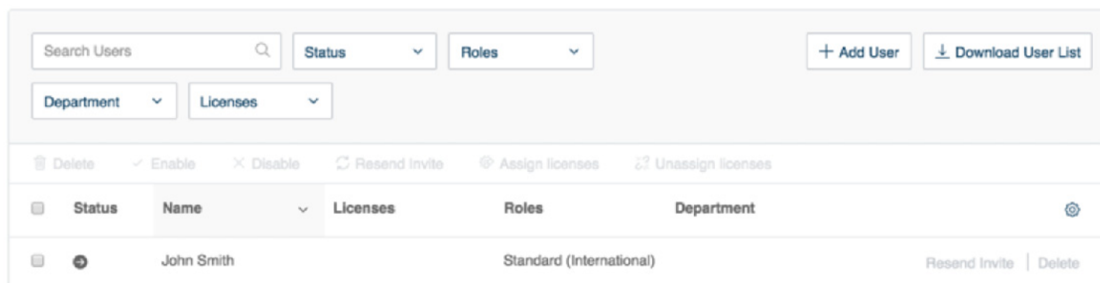
On your RingCentral Meetings account you may configure user details by selecting a user from the User List and customizing the user details.

To configure a user's details:

1. Select **User List** from the **Users** menu.
2. Select a user from the user list.
3. On the User Details tab, you may change:
   - First Name
   - Last Name
   - Department
   - Contact Phone
   - Email
   - Status
4. On the Meetings tab, you may change:
   - First Name
   - Last Name
   - Department
   - Contact Phone
   - Email
   - Status
5. Click **Save**.







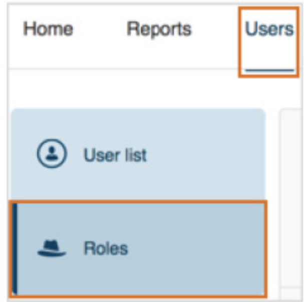
Assign Users to a Role

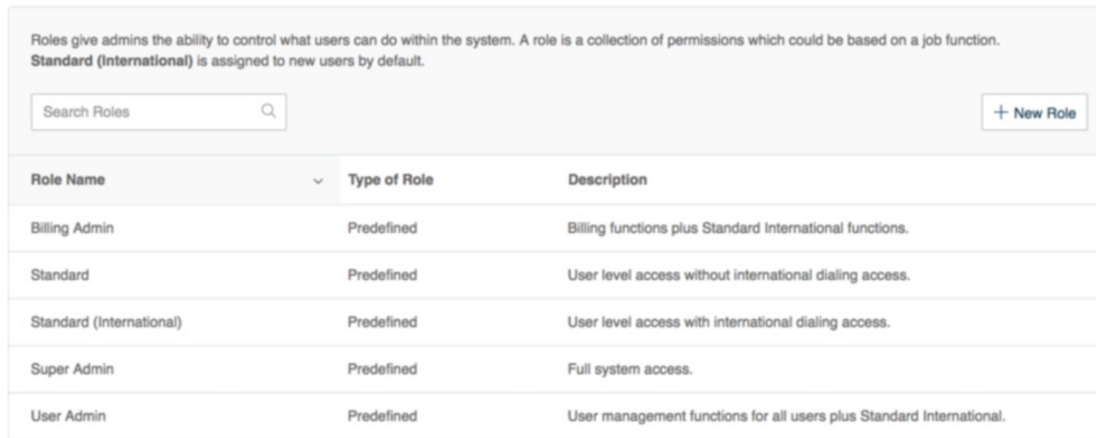
You may assign multiple users to a role. You may also assign a user individually to a role through the user's settings.

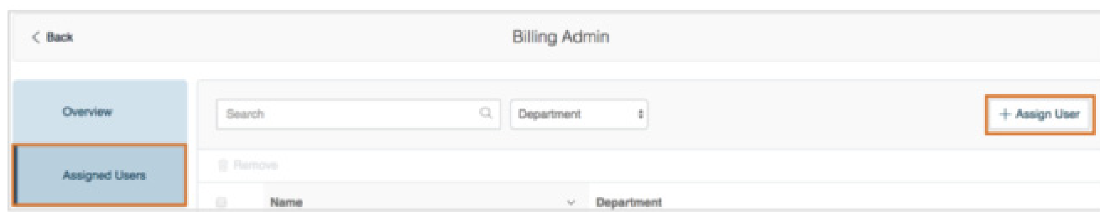
Assign Multiple Users to a Role

To assign multiple users to a role:

1. Select **Roles** from the **Users** menu.
2. Select a role.
3. On the **Assigned Users** tab, click **Assign Users**.
4. Check the users you want to assign to the role.
5. Click **Save**.



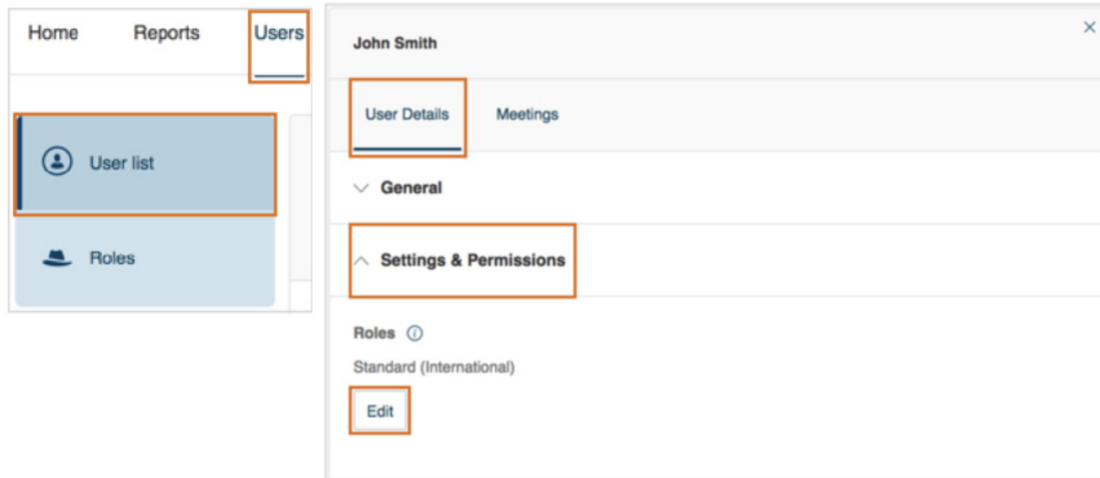


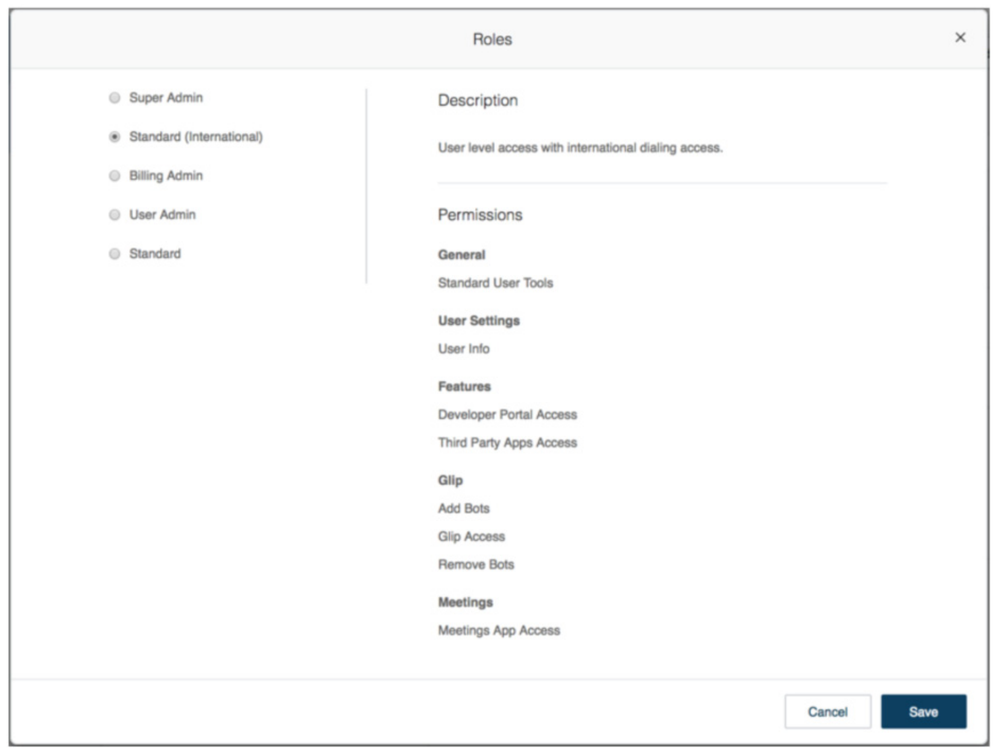


Assign a Role to a Single User

To assign a role to a single user:

1. Select **User List** from the **Users** menu.
2. Select a user from the list.
3. Go to **User Details** > **Settings and Permissions**.
4. Click **Edit** under **Roles**.
5. Check the role you want to assign to the user.
6. Click **Save**.



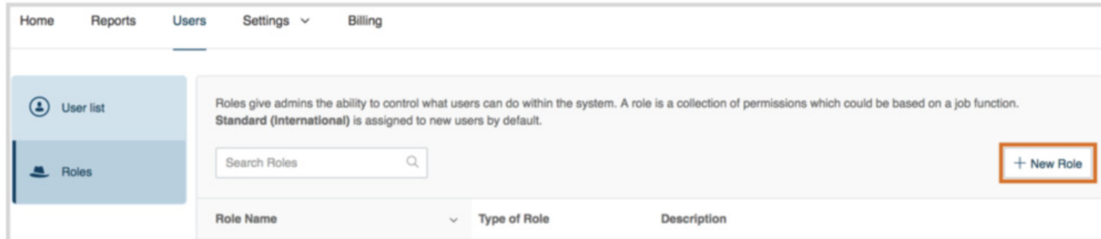


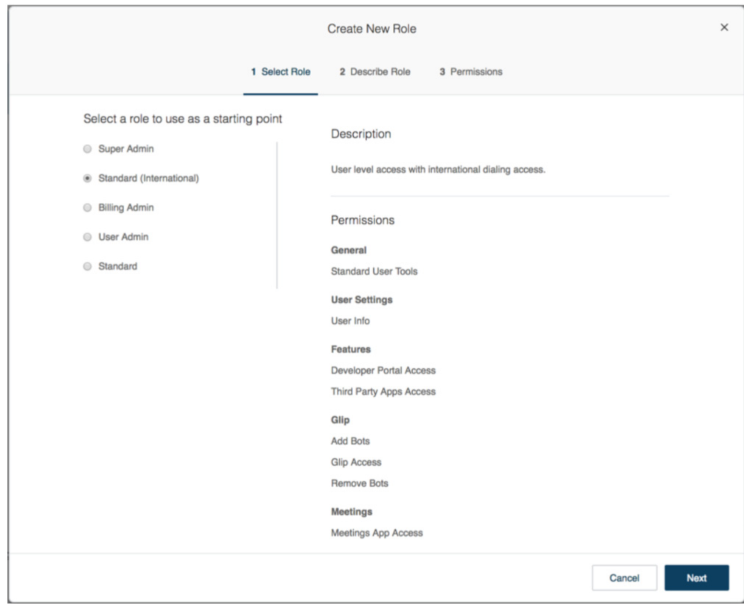
Create a Custom Role

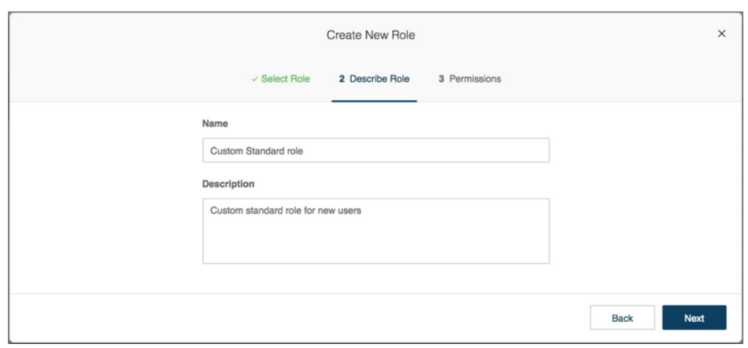
You can create a new custom role on your Meetings account by adding a New Role through the Roles section of the User menu.

To create a new custom role:

1. Select **Roles** from the **User** menu.
2. Click the **New Role** button.
3. Select a role to use as an initial template. You can then customize the permissions that you will assign to the new role.
4. Enter a name and description for the role.
5. Click **Next**.

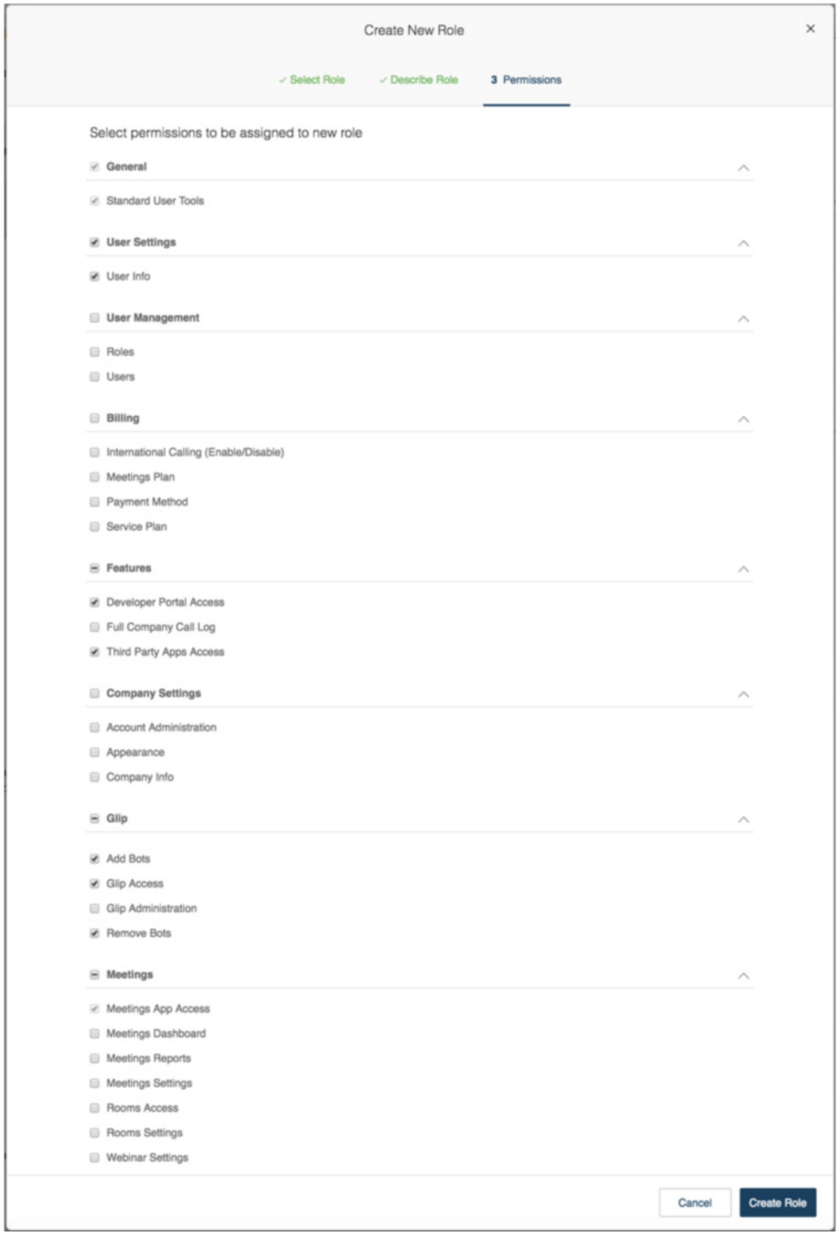






6. Select the permissions you want to assign to the new role. Features are grouped into categories matching the product user interface. Check the boxes on permissions you want to grant.
7. Click **Create Role**.

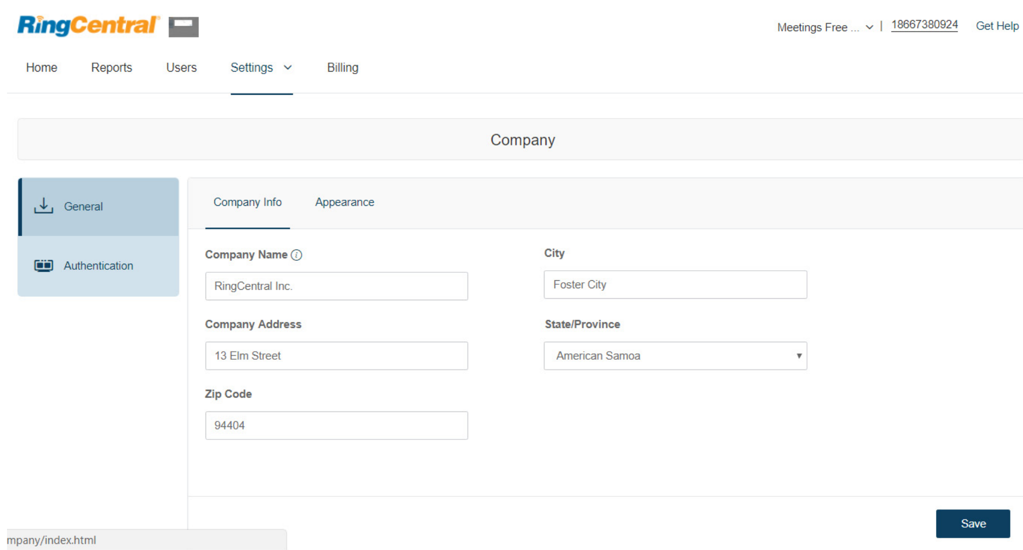
You receive a confirmation message that the role has been created successfully. You can select **Assign** to assign multiple users to the role.



Meetings Settings

Meetings settings allow you to configure company information, and account-level or individual settings for meetings. The following settings are available for editing by users or administrators:

- Company Settings
- Glip Administration
- Meetings Settings
- My Settings



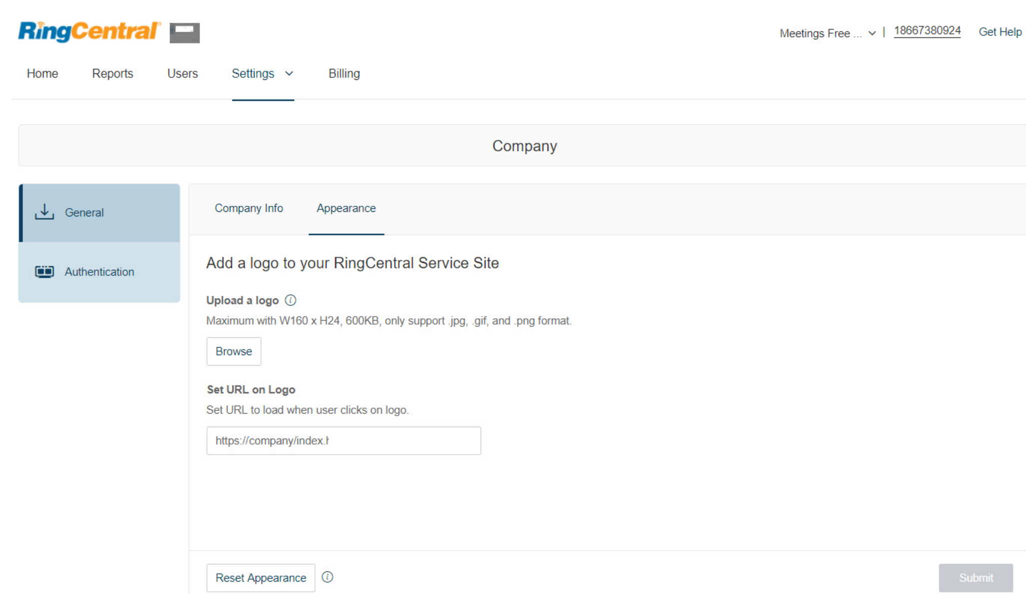
Company Settings

You can access the company information and appearance settings through **Company** under the Settings menu.

Configure Company General Settings

To configure company general settings:

1. Go to **Settings** > **Company**.
2. Change the company information as needed.
3. Click **Save**.
4. Click the **Appearance** tab.
5. You may upload a logo with these parameters:
   - Only JPEG, GIF, or PNG files may be uploaded
   - Only one graphic image may be displayed
   - Maximum file size 600kB
   - Optimal picture size 160 x 24 pixels
6. Enter the URL to load when a user clicks on logo.
7. Click **Submit**.



The logo appears by RingCentral in your online account.

Note: clicking on **Reset Appearance** resets the URL link and removes the logo from your online account.

Configure Company Authentication Settings

To configure company authentication settings:

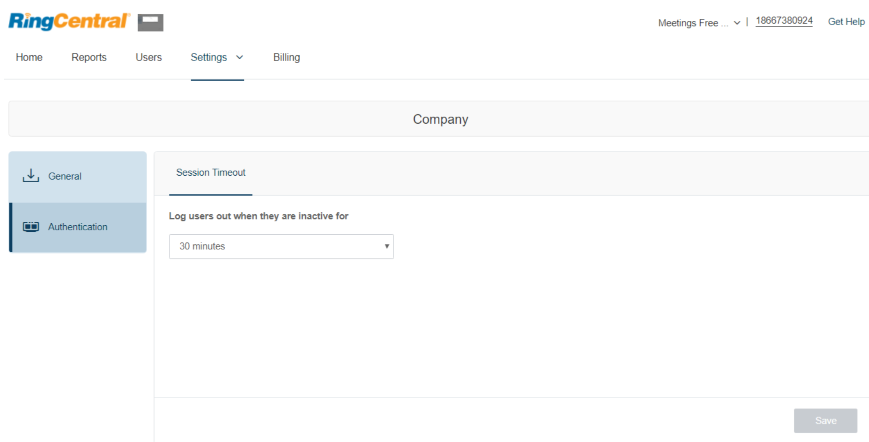
1. Go to **Settings** > **Company**.
2. Click the **Authentication** tab.
3. You can configure the following settings on the **Authentication** tab:

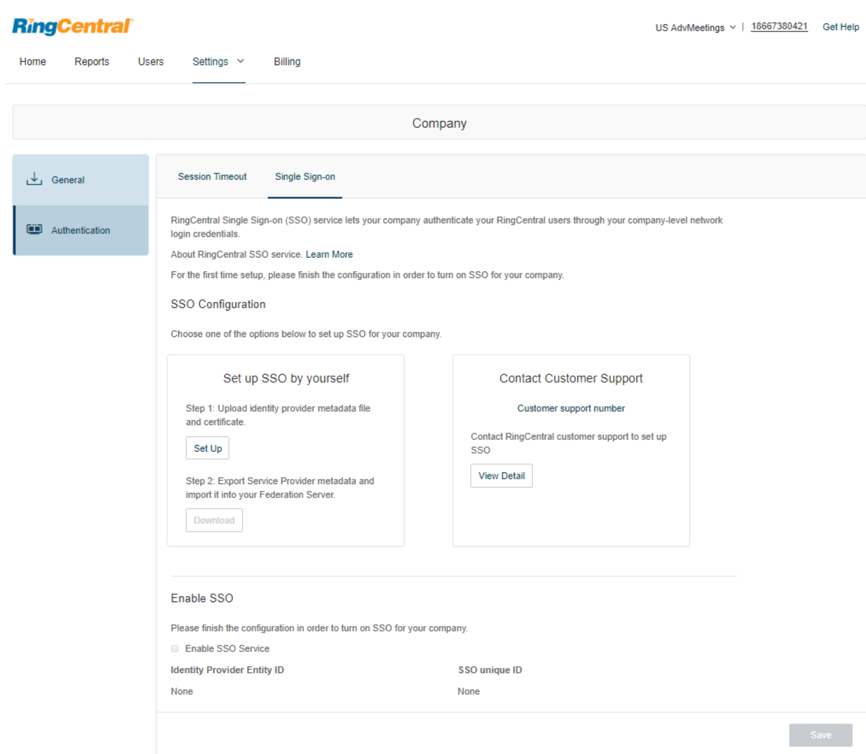
Session Timeout

Log users out when they are inactive for this duration.

Single-Sign On

RingCentral Single-Sign-on (SSO) service lets your company authenticate your RingCentral users through your company-level network login credentials. For more information on SSO, see *Setting up RingCentral Single Sign-On*.





Glip Administration

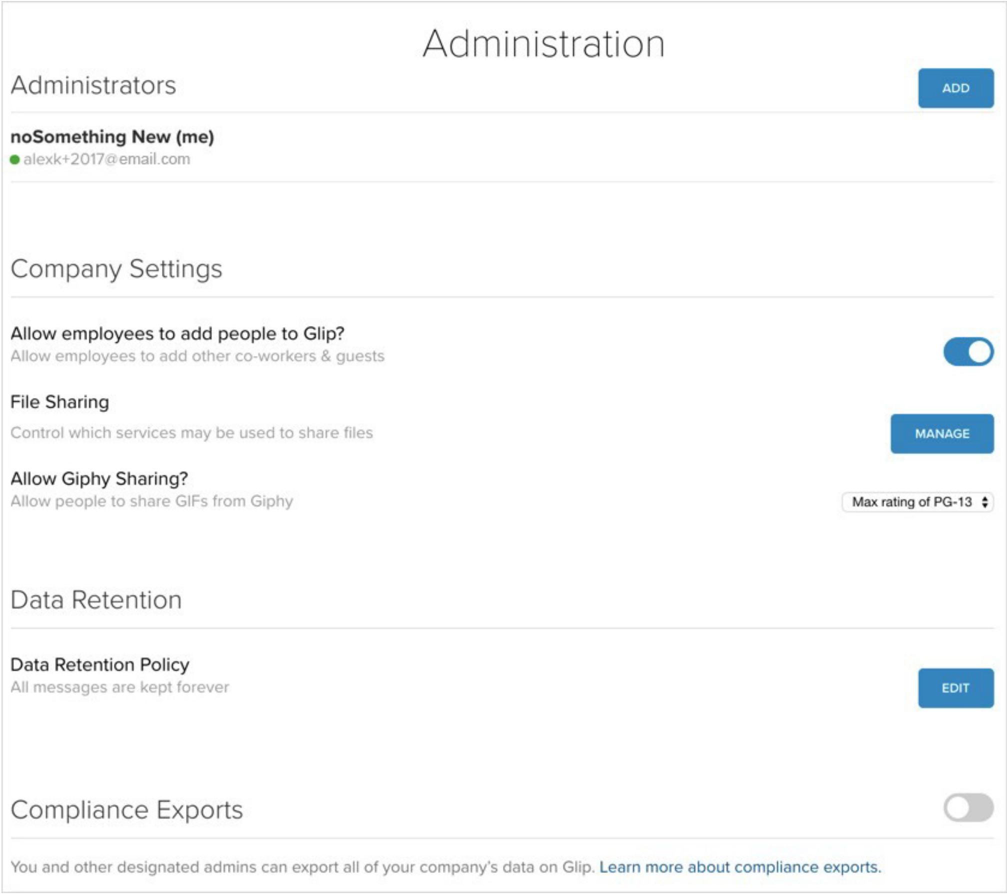
You can configure your RingCentral Glip settings through your Meetings account. You can access the Glip administration settings through **Glip Administration** under the Settings menu.

To configure your RingCentral Glip settings:

1. Go to **Settings** > **Glip**.
2. Under **Glip Settings** click **Edit**.
3. Go to **Administration** > **Configuration**.
4. The Glip Administration page will open in a new window where you can configure your Glip settings.

The Administrators section lists all of your company's Glip administrators (admins). By default, the first person at your company to sign up for Glip is an admin.

For more information on Glip administration, see this knowledgebase article. To learn about RingCentral Glip, see the *RingCentral Glip online user guide*.



Meetings Settings

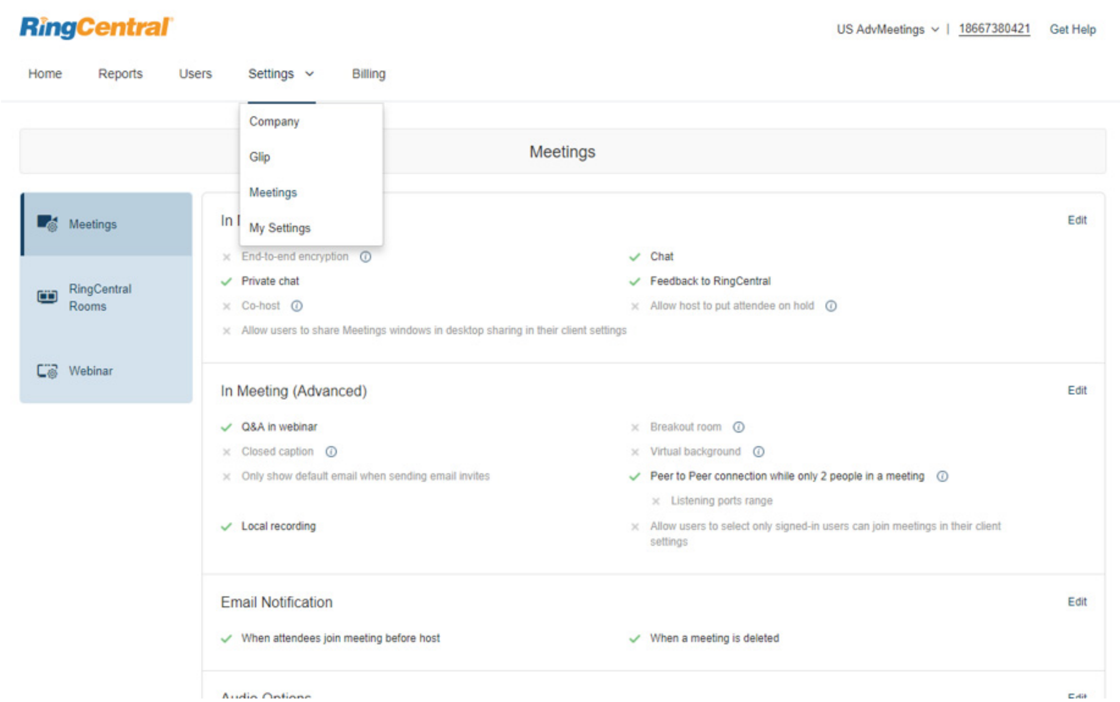
Administrators can configure account-level Meetings settings for all Meetings users. The following sections describe the available settings you can configure.

- Configure RingCentral Meetings Settings
- Configure RingCentral Rooms Settings
- Configure RingCentral Webinar Settings

Configure RingCentral Meetings Settings

To configure Meetings settings:

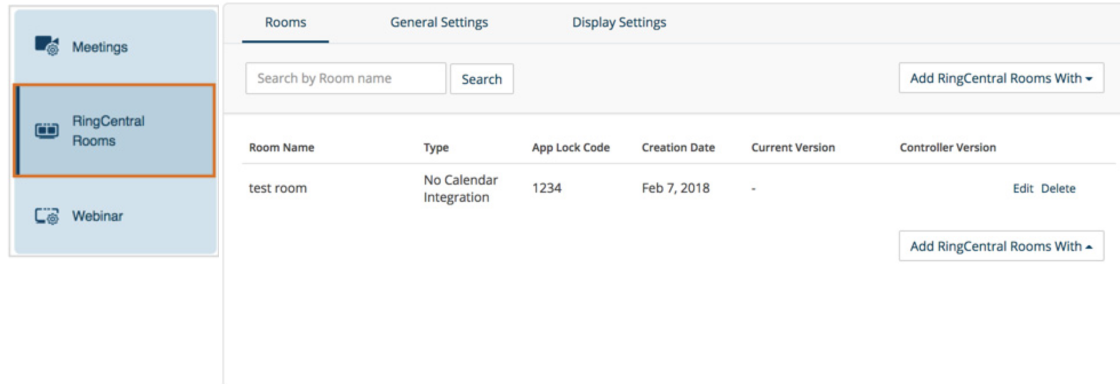
1. Go to **Settings** > **My Settings**.
2. Click the **Meetings** tab.
3. You can configure the following settings:
   - Basic
   - Advanced
   - Notification



Configure RingCentral Rooms Settings

RingCentral Rooms is an add-on service that requires a Rooms license. You can configure your Rooms settings in your Meetings account through Meetings in the Settings menu. To configure your Rooms settings:

1. Go to **Settings** > **Meetings**.
2. Select the **RingCentral Rooms** tab.
3. You can configure the following settings:



Rooms

In the **Rooms** tab, you can view all the rooms that are configured with RingCentral Rooms licenses in your online account. Information is displayed for each room:

- Room Name: The name you assigned when creating the conference room.
- Type: The type of calendar integration with the conference room.
- App Lock Code: The numeric code that controls access to the iPad controller settings.
- Creation Date: The date when you created the conference room.
- Current Version: The version of RingCentral Rooms software installed on the Mac or Windows machine.
- Controller Version: The version of software installed on the iPad controller. When a newer release becomes available, you can click to upgrade here (or, you can downgrade to an earlier version).

General Settings

In the **General Settings** tab, you can configure event notifications, advanced settings, support contact information, and background image.

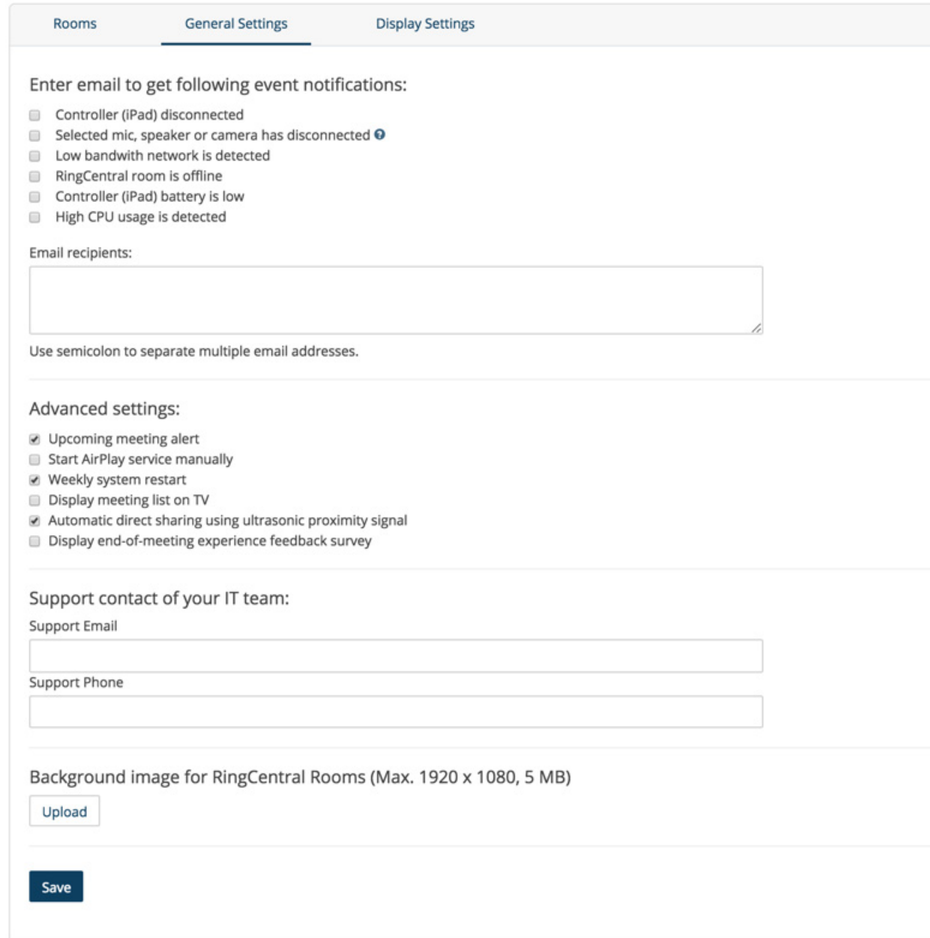
To configure event notifications, indicate the events for which you want to receive notifications. In **Email Recipients**, enter the email addresses to get notifications. Use a semicolon to separate email addresses.

Configure these **Advanced settings**:

- Upcoming meeting alert: enable receiving a meeting alert on the iPad controller 10 minutes before start of a scheduled meeting.
- Start AirPlay service manually: enable users to start AirPlay service manually with the RingCentral Rooms Mac.
- Weekly system restart: enable auto restart of your computer weekly (Saturday), between the hours of 2:00–4:00 a.m. (local time on the computer), when no meeting is in progress.
- Display meeting list on TV: display all upcoming meetings on your TV, monitor or projector display. Requires meetings to be scheduled in Google, or Microsoft Exchange.
- Automatic direct sharing using ultrasonic proximity signal: enables the iPad controller to generate an ultrasonic signal that can be detected by the Meetings desktop app.
- Display end of meeting experience survey: prompt attendees with a feedback survey.

Click **Upload** to add a background image for RingCentral Rooms. This is an image of 1920 x 1080 maximum resolution, and 5 MB size.

Click **Save** to save your settings.



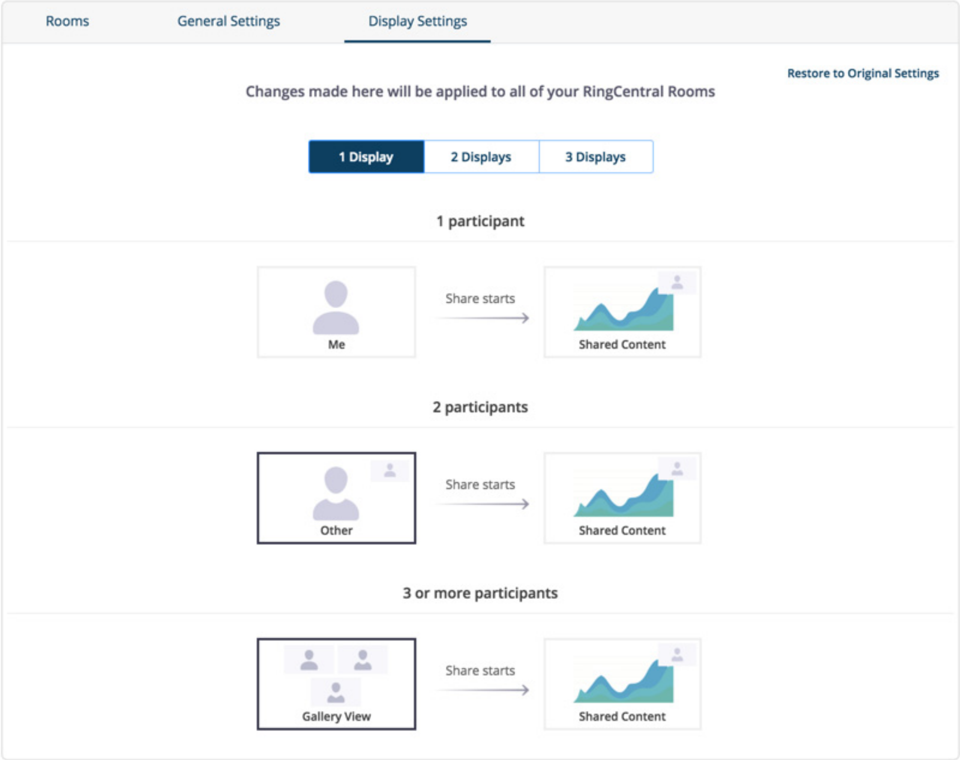
Display Settings

RingCentral Rooms supports multiple displays. The RingCentral Rooms display settings you can configure in this section apply to video and content display in all of your rooms. What users can see on each screen depends on the number of participants and whether anyone is sharing a screen.

Note: to customize individual rooms, go to the Rooms tab, click a room name, and select **Display Settings**.

To set display settings for RingCentral Rooms:

1. Click **RingCentral Rooms** in the **Settings** menu.
2. Click the **Display Settings** tab.
3. You can customize the default screen views on one, two, or three displays. For each display configuration, select the default screen views for each number of participants. At least one screen must be set to Shared Content.
4. Click **Save Changes** to save your settings, or click **Restore to Original Settings** if needed.

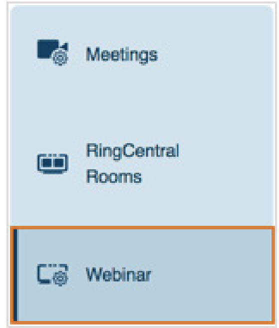


Configure RingCentral Webinar Settings

RingCentral Webinar is an add-on service for RingCentral Meetings that lets you host virtual events and online training with up to 10,000 attendees, joining from desktop, tablet and smart devices.

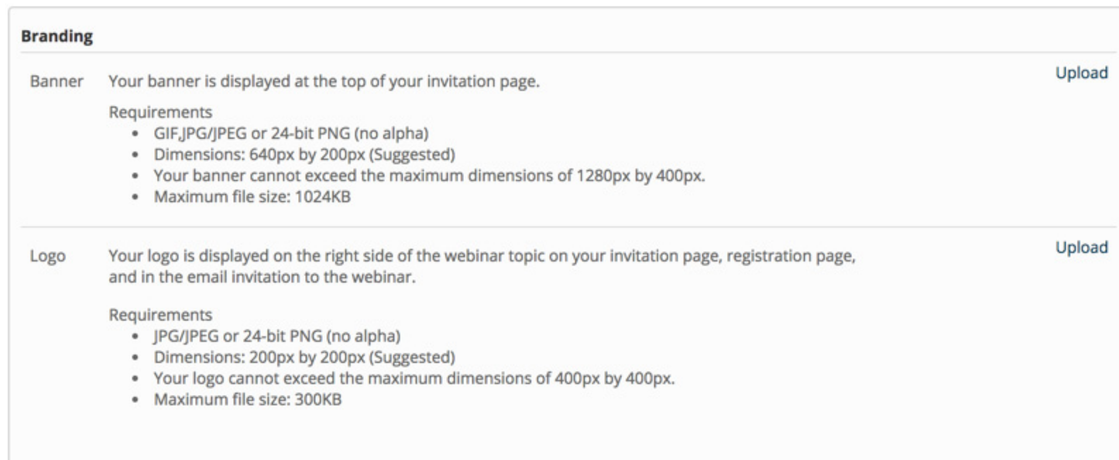
The Webinar setting for your account can be changed by the Super Admin and Webinar license owner. To configure your Webinar settings:

1. Go to **Settings** > **Meetings**.
2. Select the **Webinar** tab.
3. On the Webinar tab configure these settings:



Branding

Click **Upload** to customize your banner and logo. The requirements are provided to upload an optimal image for your banner and logo.



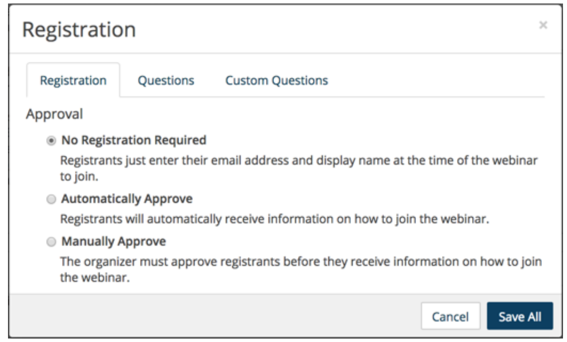
Registration Settings

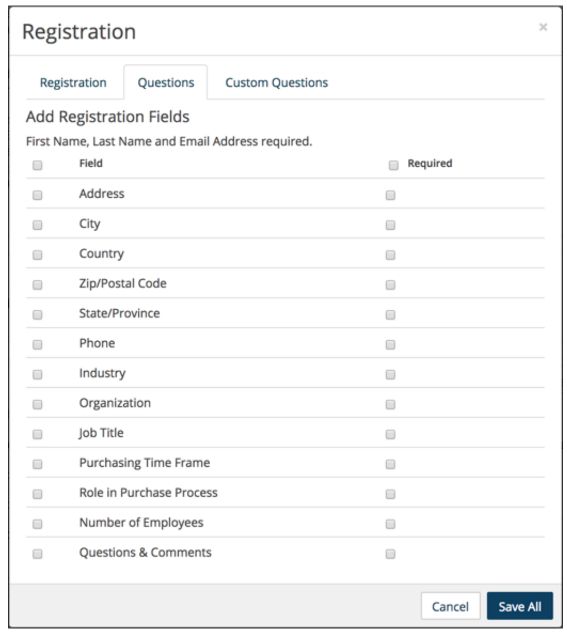
Edit RingCentral Webinar registration settings to customize how registrants register for and join webinars. Click **Edit** to configure:

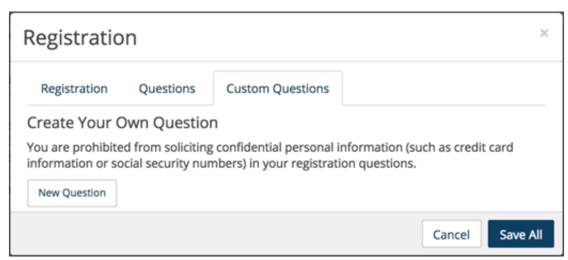
- No Registration Required: When this option is selected, recipients will be given a URL to join the webinar and will have to enter their name and email to join.
- Automatically Approve: When this option is selected, the webinar host will not need to approve every registrant. Registrants will automatically receive a confirmation once registration is complete.
- Manually Approve: When this option is selected, the webinar host will need to approve every registration.To save the settings, click **Save All**.

Edit the **Questions** tab to add pre-defined questions into the RingCentral Webinar registration. Select the fields that will appear on the registration page and set the required fields. Check the Required field if any question field is mandatory.

On the **Custom Questions** tab, click **New Question** to create customized questions that are either short answer or multiple choice on your Attendee Webinar Registration. You are prohibited from requesting confidential personal information (such as credit card or social security numbers) in your registration.







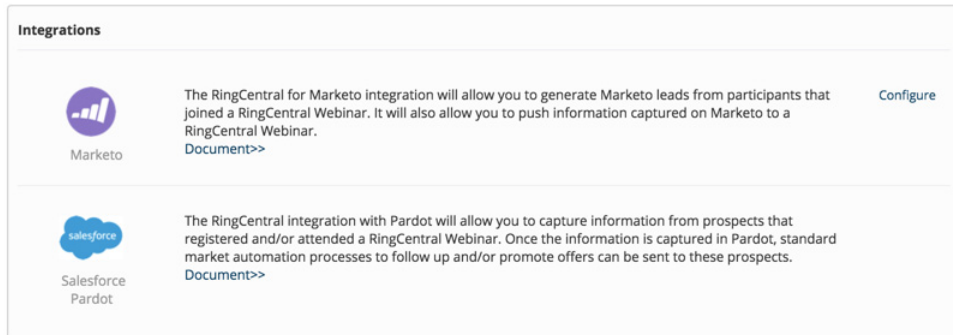
Email Settings

Click Edit to customize your settings for Invitation email, Confirmation email, reminder email, and follow-up email.

Integrations

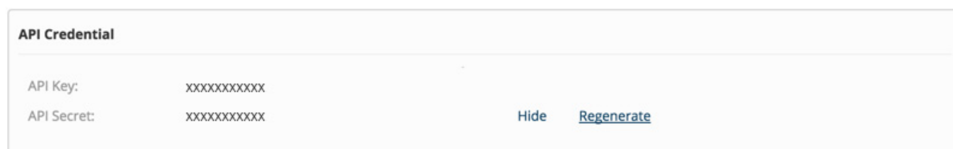
Click **Configure** to set up Webinar integration with Marketo or Salesforce Pardot. For a step-by-step guide on Webinar integrations, see:

- *RingCentral Webinar Integration with Marketo*.
- *RingCentral Webinar Integration with Pardot*.



API Credential

Click **Regenerate** to generate a new API Secret.

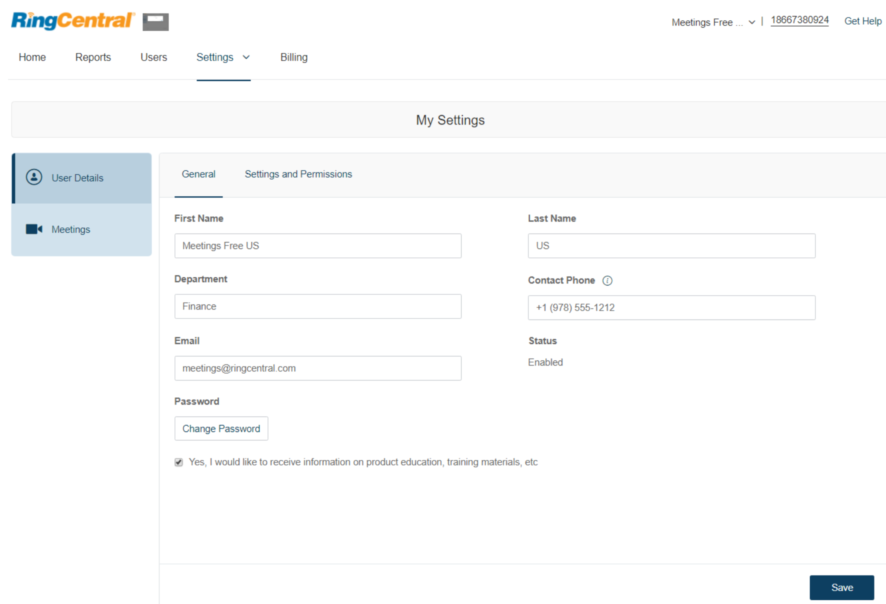


My Settings

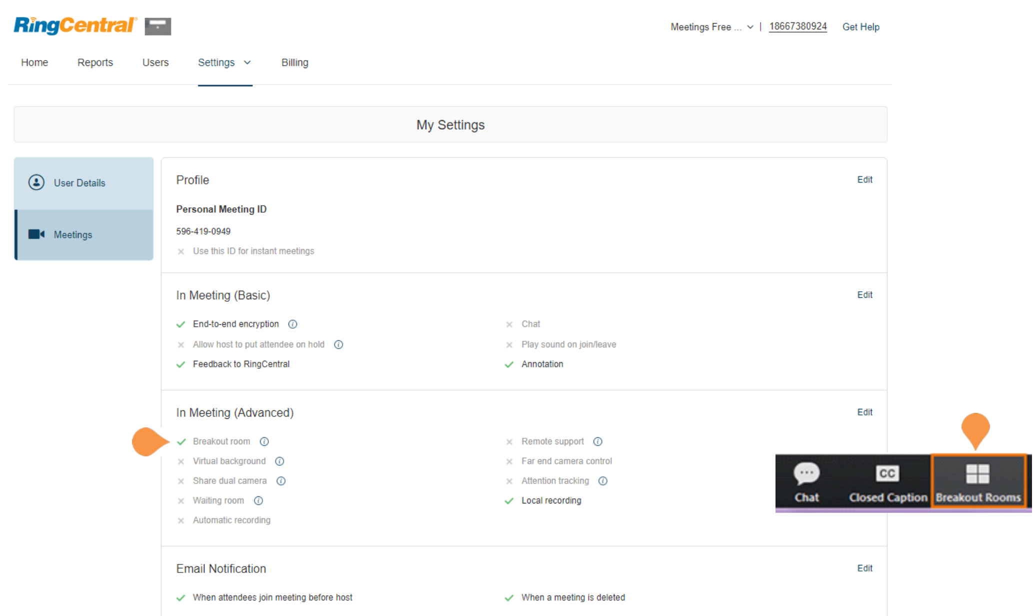
Your Meetings accounts allows users to configure their individual settings for Meetings through their online account. Administrators (User Admin or Super Admin) can also configure the Meetings settings of other users.

To configure your individual Meetings settings:

1. Go to **Settings** > **My Settings**.
2. Click the **User Details** tab.
3. Update any of your user settings as needed.
4. You can view the permissions for your role under the **Settings and Permissions** tab.
5. Click the **Meetings** tab.
6. You can configure the following settings:
   - Basic
   - Advanced
   - Notification
7. Click **Save**.



For a description of these RingCentral Meetings settings, see the this knowledgebase article. For example, if you enable the Breakout rooms feature, the **Breakout Rooms** feature icon will become available for participants of your meeting to use in-meeting from the Meetings desktop application user interface.



To configure another user's settings (as admin):

1. Go to **Users** > **User List**.
2. Click the **Meetings** tab.
3. Click **Edit** by **Edit this user's meeting settings...**
4. You will be redirected to the user's settings page.
5. Complete your changes to the user's settings.
6. Click **Save**.

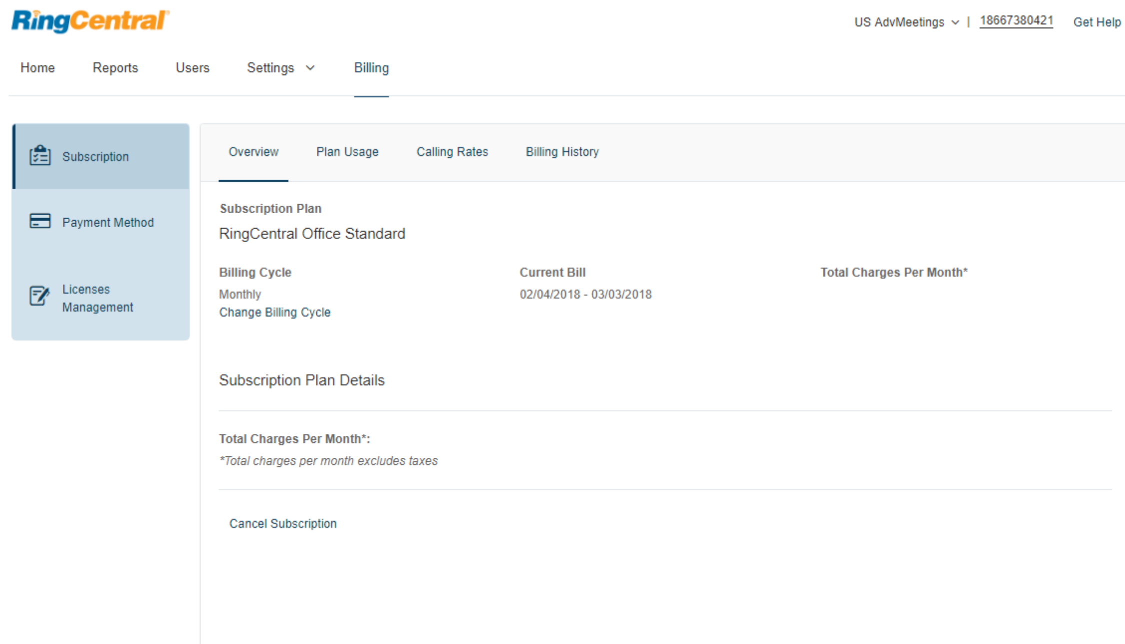
Billing

View Subscription

The **Subscription** tab provides data related to your RingCentral Meeting subscription, usage, calling rates, and billing history.

View Subscription Data

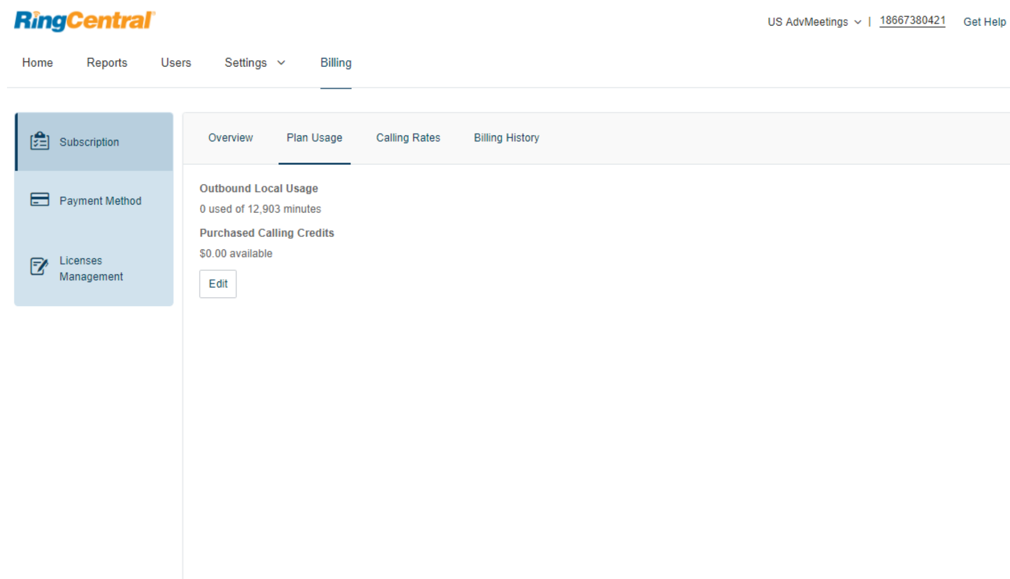
The **Overview** tab provides information on your subscription plan, billing cycle, current bill, and total charges per month.

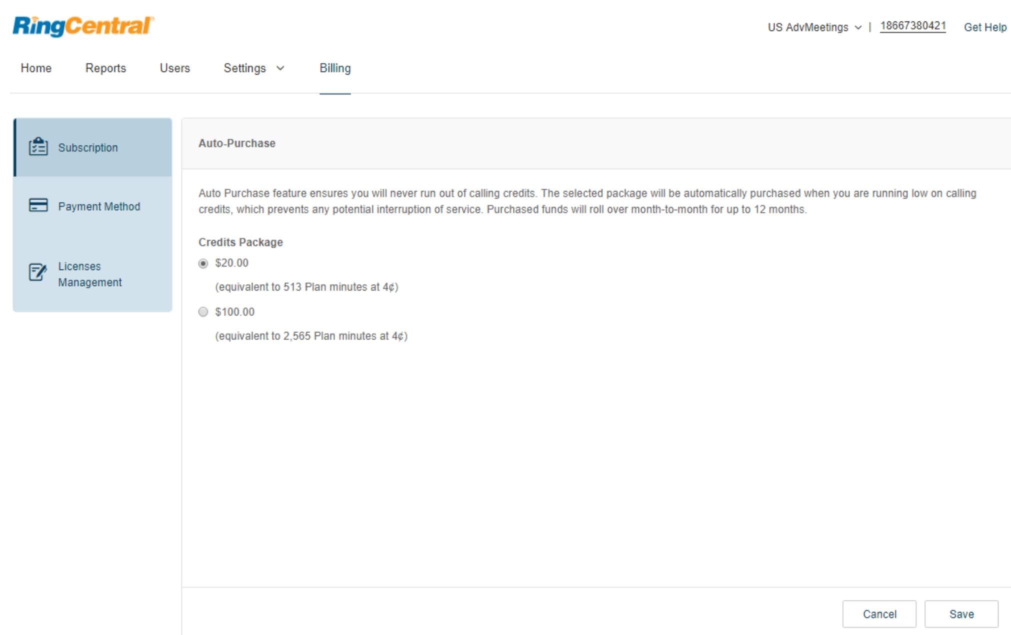


View Plan Usage

The Plan Usage tab provide information on Outbound Local Usage and Purchased Calling Credits. You can click Edit to configure the Auto Purchase feature to ensure you do not run out of calling credits.

When you select a package, it will be automatically purchased when you are running low on calling credits, which prevents any potential interruption of service. Purchased funds will roll over month-to-month for up to 12 months.

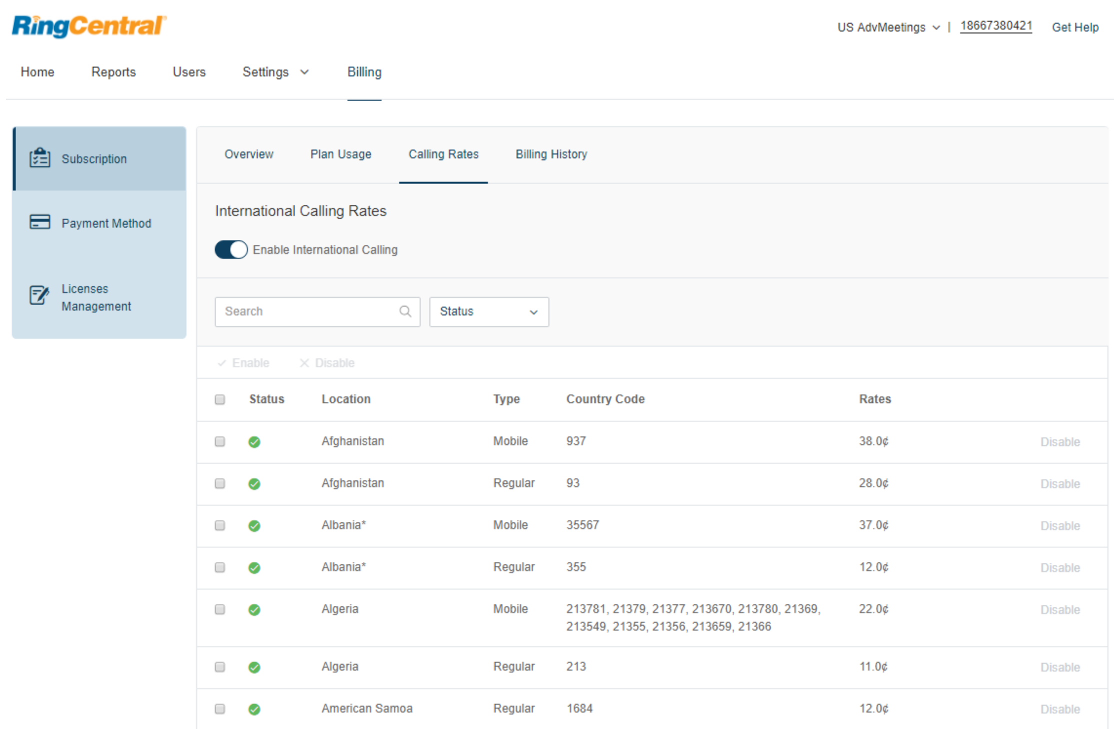




View Calling Rates

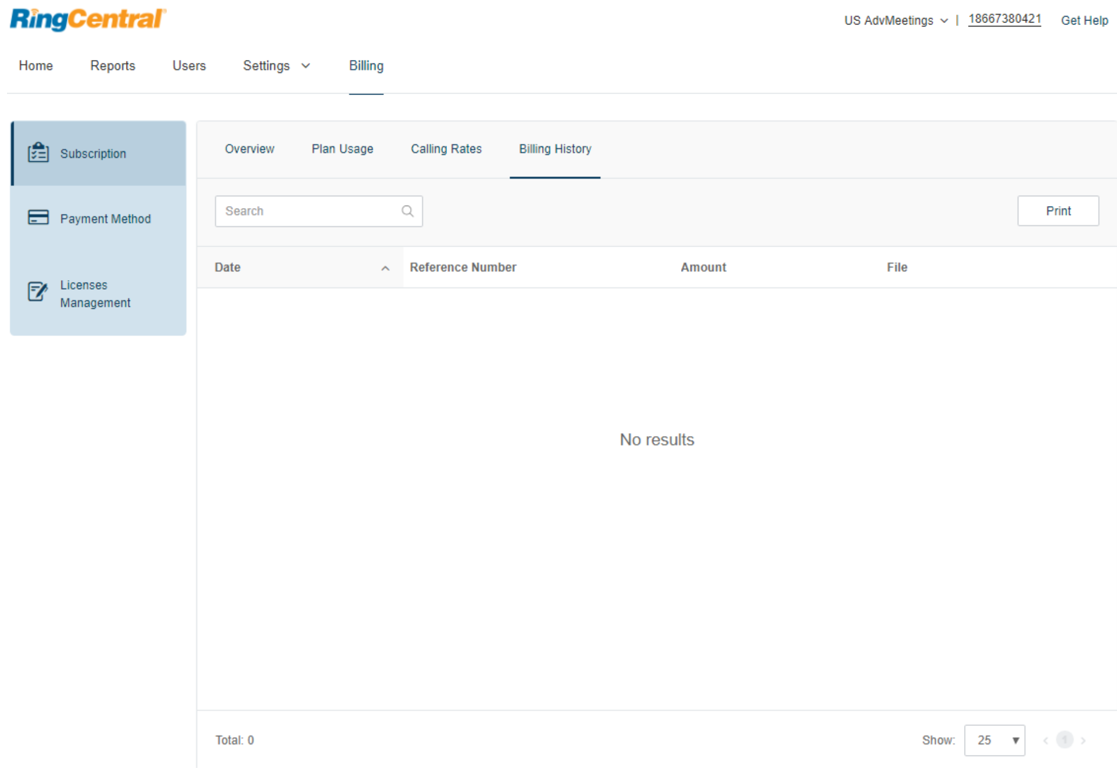
The Calling Rates tab provides the international calling rates for available international locations, and the status of whether calls can be made to those regions.

Click the **Enable International Calling** switch to enable or disable international calling. To disable calling to a particular international location, locate or search for that location, and click **Disable** next to the location.



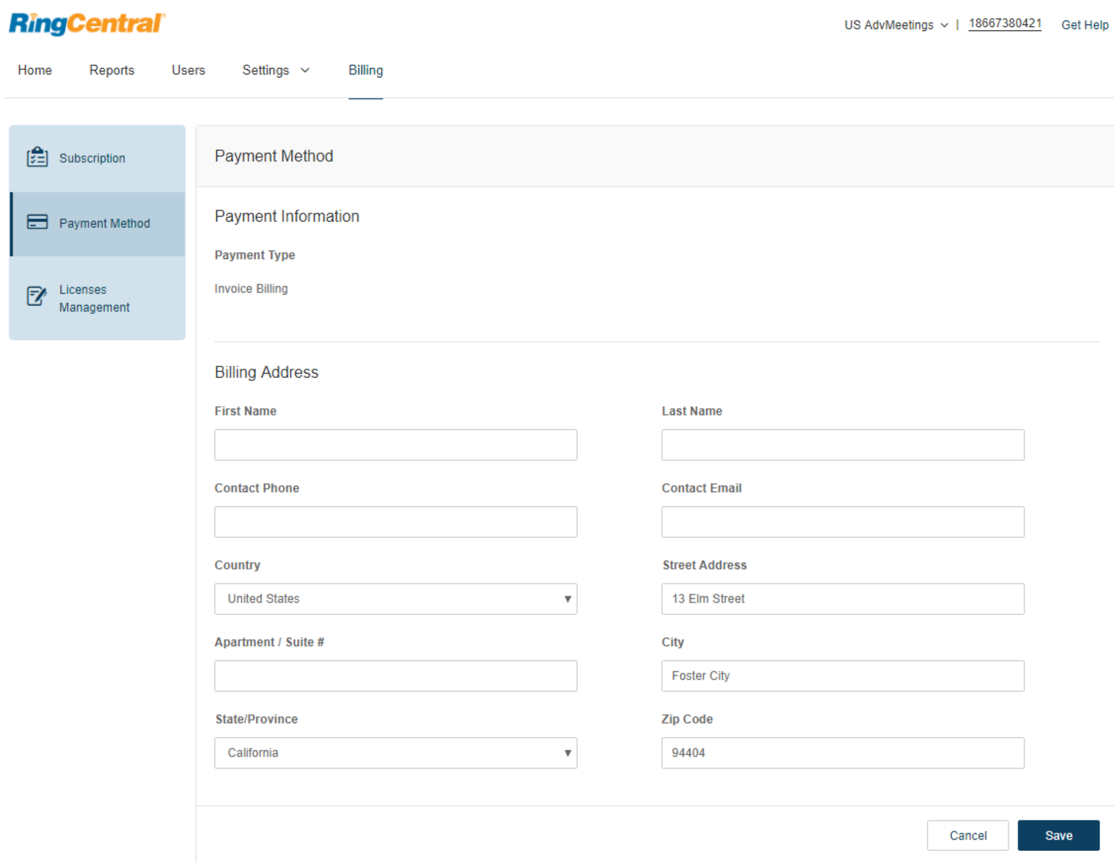
View Billing History

The **Billing History** tab provides a detailed history of RingCentral Meetings billing for your account. You can print your billing data by clicking **Print**, or search your bills for certain data.



Edit Payment Method

The Payment Method tab allows you to view or edit your payment information, including payment type and billing address. To edit your payment method, click **Edit**, change the payment method, and click **Save**.



Manage Licenses

The **Licenses Management** tab provides a list of your current licenses for your RingCentral Meetings online account. You can view the license type, the price, whether the license is assigned or not, and the total remaining licenses not yet assigned.