RingCentral for Microsoft Teams

Embedded App 2.0

Admin Guide for OAuth-based Authorization

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Introduction

This document outlines step-by-step instructions for administrators to remotely install the RingCentral for Microsoft Teams Embedded app to users in their organization using the [RingCentral Admin Portal](). The embedded app will be installed on the users Teams app on the desktop and web.

Prerequisites

To access the Admin setup for installing the RingCentral embedded app, you must have the **all the following administrator roles** to your organization's RingCentral and Microsoft 365 accounts.
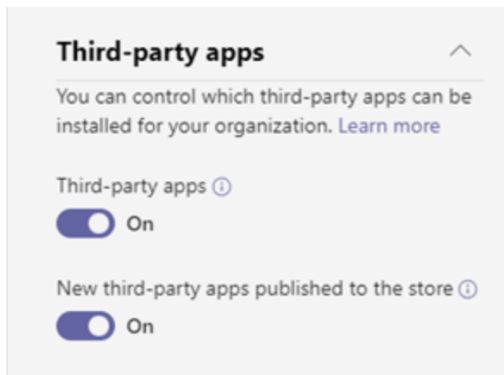
For RingCentral:

1. Super Administrator
2. User Administrator

For Microsoft 365:

1. Global Administrator or Priviledged roles administrator
   Additionally
      a. User Administrator
      b. Teams Administrator
      c. Application Adminstrator

Also ensure all the **required app installation permissions** are enabled from your Microsoft or Teams admin center

1. Check if 3rd party apps are allowed to be installed in your organization's Teams app. You can learn more from this [Microsoft documentation](),

2. Please check if the RingCentral app is in the "Allowed" status under **Manage Apps** in the admin center.
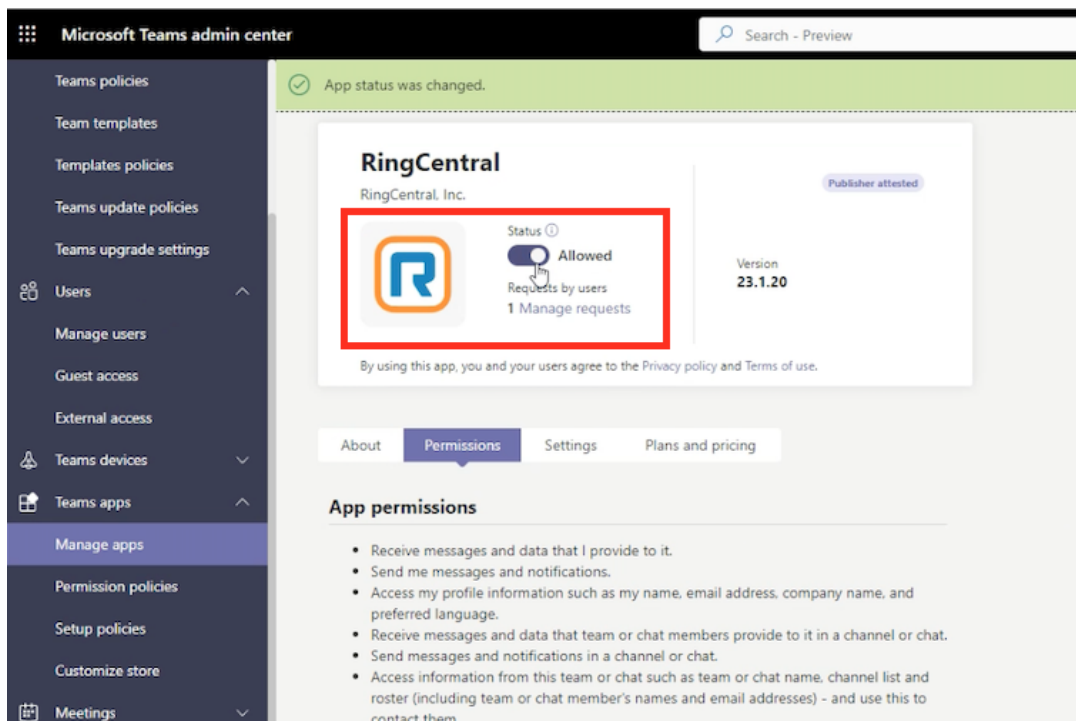
3. Please ensure that RingCentral is whitelisted in case you have disabled third-party apps from being installed in your Teams app. Refer to this article in Microsoft documentation for more details.
4. If you and your organization are using the preview version of the Teams app, please note that RingCentral is currently working on supporting this version. You can refer to the release notes for the latest updates.

Things to keep in mind

As you try out the new Teams, you will likely encounter some gaps as this preview release only includes some of the features available in classic Teams. Features such as 3rd party apps, Line of Business (LOB) apps, advanced calling features such as call queues, and advanced meeting capabilities, including breakout rooms, have yet to be released.

5. Please refer to sections 1, 14 and 15 of this article for the network requirements for firewall and web proxy configuration that the RingCentral for Teams app requires to operate correctly.

    a. **Section 1: IP supernets** - should have all the mentioned IP's whitelisted
    b. **Section 15: Communication integration services**- is for integration applications, where SIP is used for making calls. When unblocked, users should see the dialer button turn green in the app
    c. **Section 16: SIP trunks**- is for audio to seamlessly go through.

# Step 1: Connect your Microsoft 365 account with RingCentral Admin Portal

1. Navigate to the [RingCentral Admin Portal](#) → Select **More** from the top menu → Select **Account Settings** from the menu on the left → Select **Microsoft Teams** → Select **Embedded App**

    The Embedded App tab as shown below hosts the step-by-step instructions to connect your Microsoft 365 account using either OAuth or Microsoft Azure, then select users in your organization and lastly, install the RingCentral Embedded app for Microsoft Teams
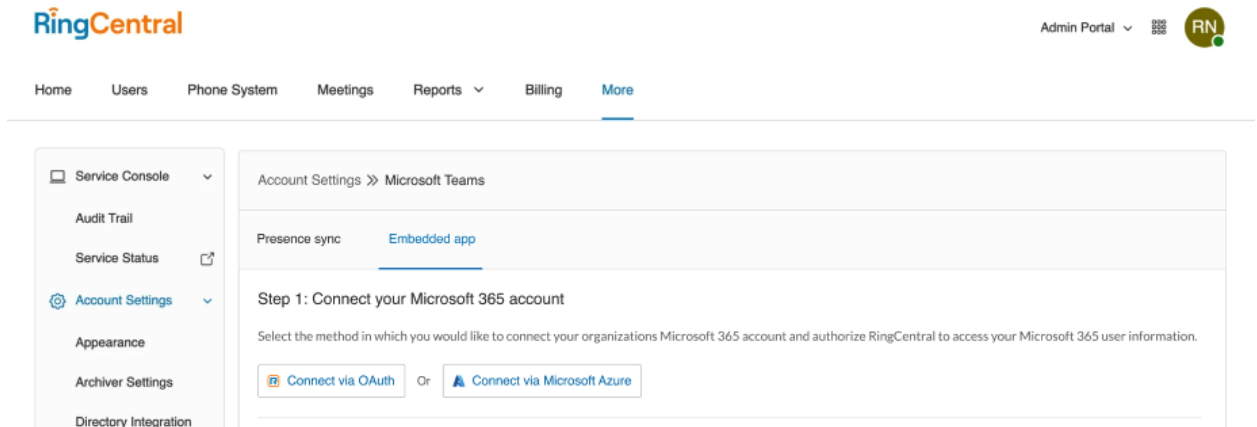
2. Continue further with this guide for instructions to **connect via OAuth**. For connecting via Microsoft Azure, please refer to [this article](#).

3. Next, Click the **Sign in** button under Step 1. This will open the Microsoft Sign in page where you need to enter your Microsoft 365 administrator credentials. Ensure to check the "Consent on behalf of your organization" checkbox before proceeding.

   Note: You must be a Global administrator or have at least the Application administrator + User administrator role to accomplish this step.

Permissions requested

RingCentral for Teams
RingCentral International, Inc. ✔
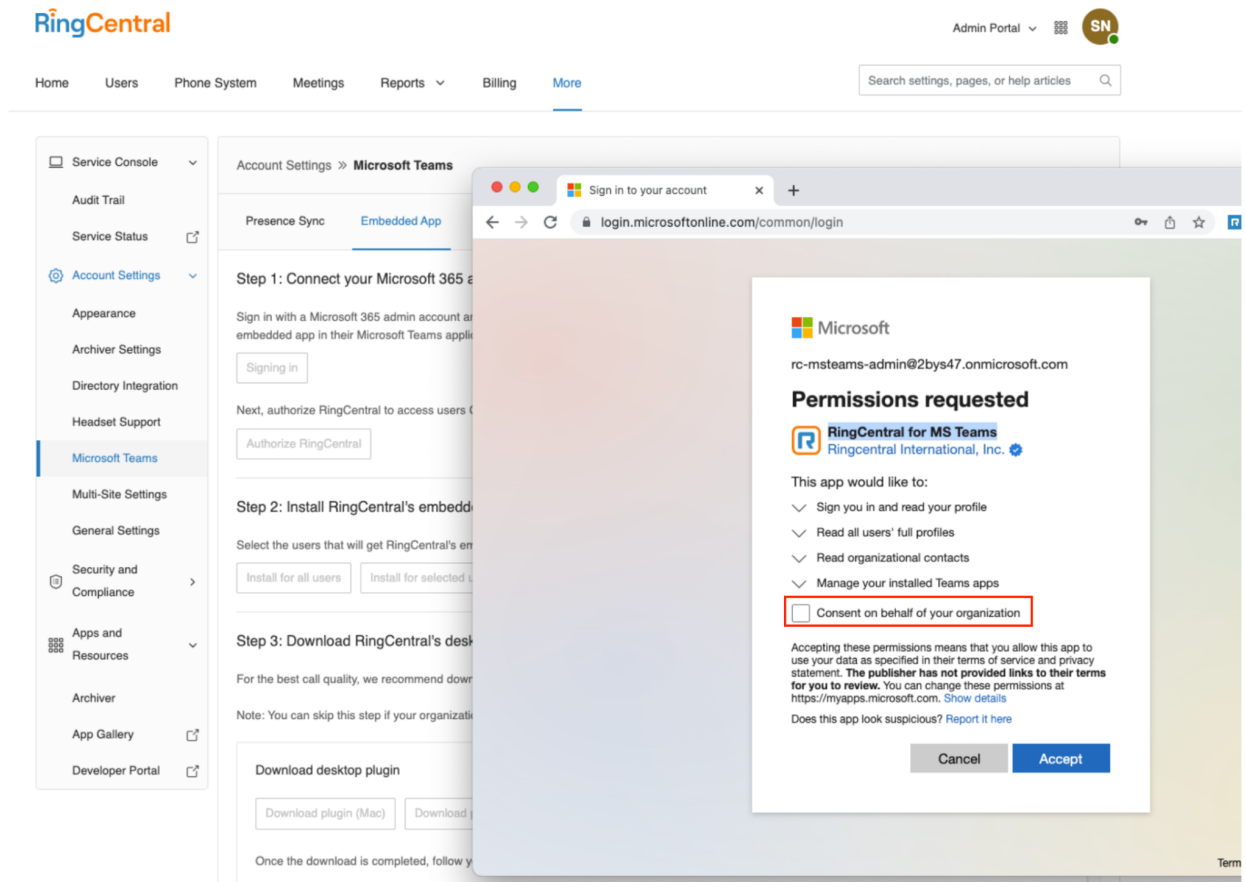
This app would like to:

⌄ Sign in and read user profile

⌄ Read all users' full profiles

⌄ Read organizational contacts

⌄ Manage user's installed Teams apps

☑ Consent on behalf of your organization

4. Next, Click the Authorize **RingCentral** button in Step 1, which will prompt you to enter your Microsoft 365 credentials or select the correct administrator account. Next, you will need to read and accept the permissions that will allow RingCentral to access your Teams user profiles so it can successfully install the embedded app.

Please note that these permissions are also required for RingCentral to send push notifications via the RingCentral bot for Teams whenever there is a missed call or voicemail etc.

5. Once Step 1 is completed, you will receive confirmation that your Microsoft 365 account is connected.

Note: It is recommended that you do not sign out unless necessary as it will disconnect RingCentral from your organization's Microsoft 365 account causing disruption to your users when they are using the RingCentral Embedded App.

Once signed out, users can not receive bot notifications or see their Microsoft contacts within their RingCentral embedded app.

Step 2: Select users to install the embedded app

Important notes:

Before proceeding to Step 2, please double-check
1. The email address of a user attached to their Microsoft account and RingCentral account are a match. If this is not the case, the embedded app will not be able to display
    a. The chat notifications whenever the user receives a missed call, SMS, fax, etc
    b. The Personal contacts from their Microsoft contact directory.

2. For accounts with **larger than 15,000 user profiles**, the admin portal will redirect to install the embedded app from the Teams Admin Center. Refer to this article for instructions.
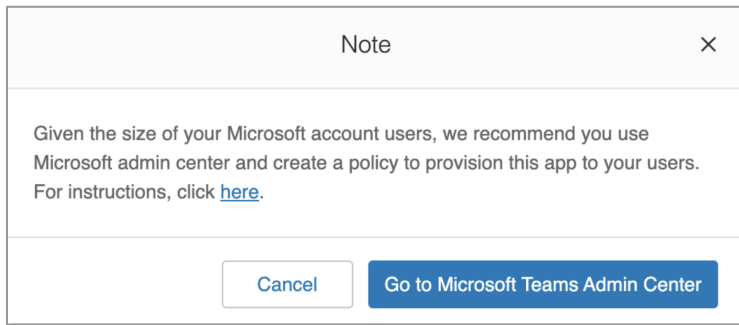
In Step 2, you can select the users listed from your Microsoft 365 account to whom you would like to install the embedded app. You can select

- A single user
- Multiple users
- All users

You can also refresh the user table and uninstall the embedded app from within Step 2.

If you are visiting this page for the first time, you will notice that Step 2 will have only the 2 buttons as shown below.

Once an installation is complete, you will notice a user table appears with the installation status and other details. You can always come back to Step 2 to select more users.

2.1: Install for all users

If you choose to install the embedded app for all users in your organization, then click on the **Install for all users** button.

The installation might take several minutes so all the buttons in Step 2 will be temporarily disabled and you can feel free to multitask by switching tabs or apps.

Once completed, you will notice a confirmation with a summary of the installation status, and a user table is displayed. You can view the users installation status, search for a user, and sort or filter the table as desired.
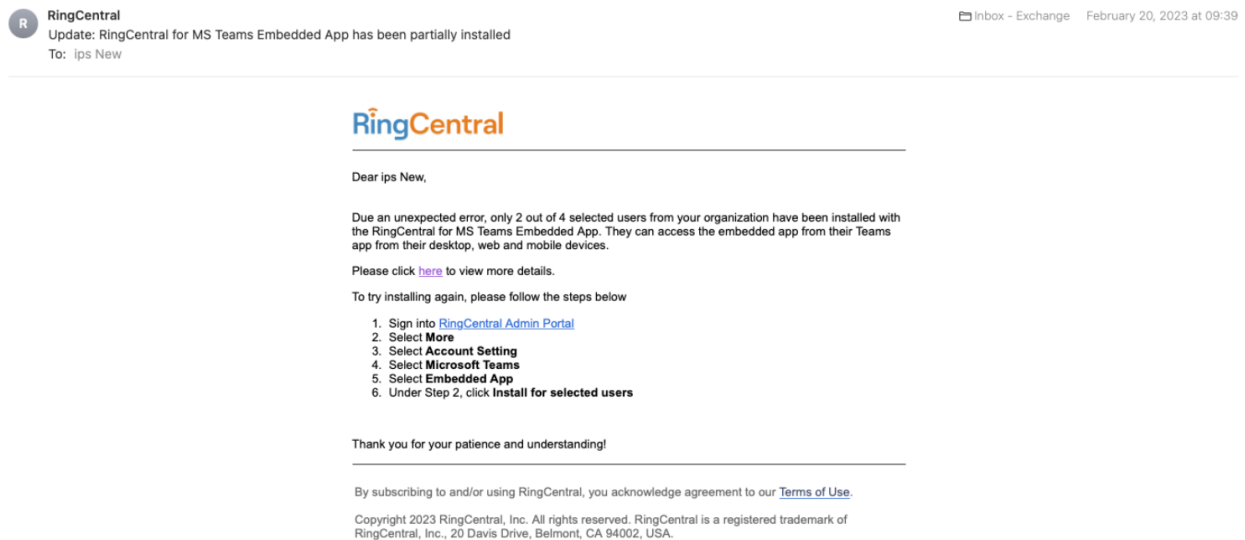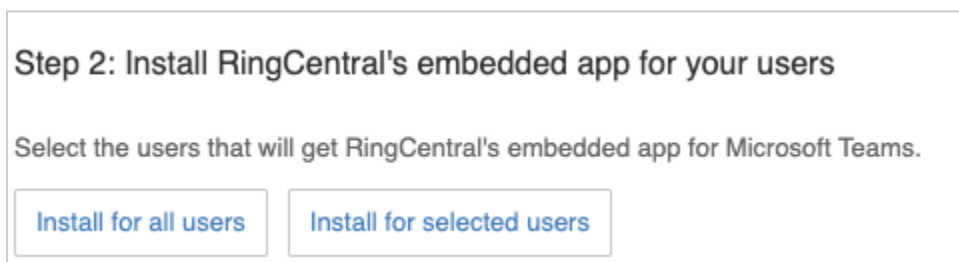
Additionally, you will also receive an email to your RingCentral email address that will contain the installation summary and more details.
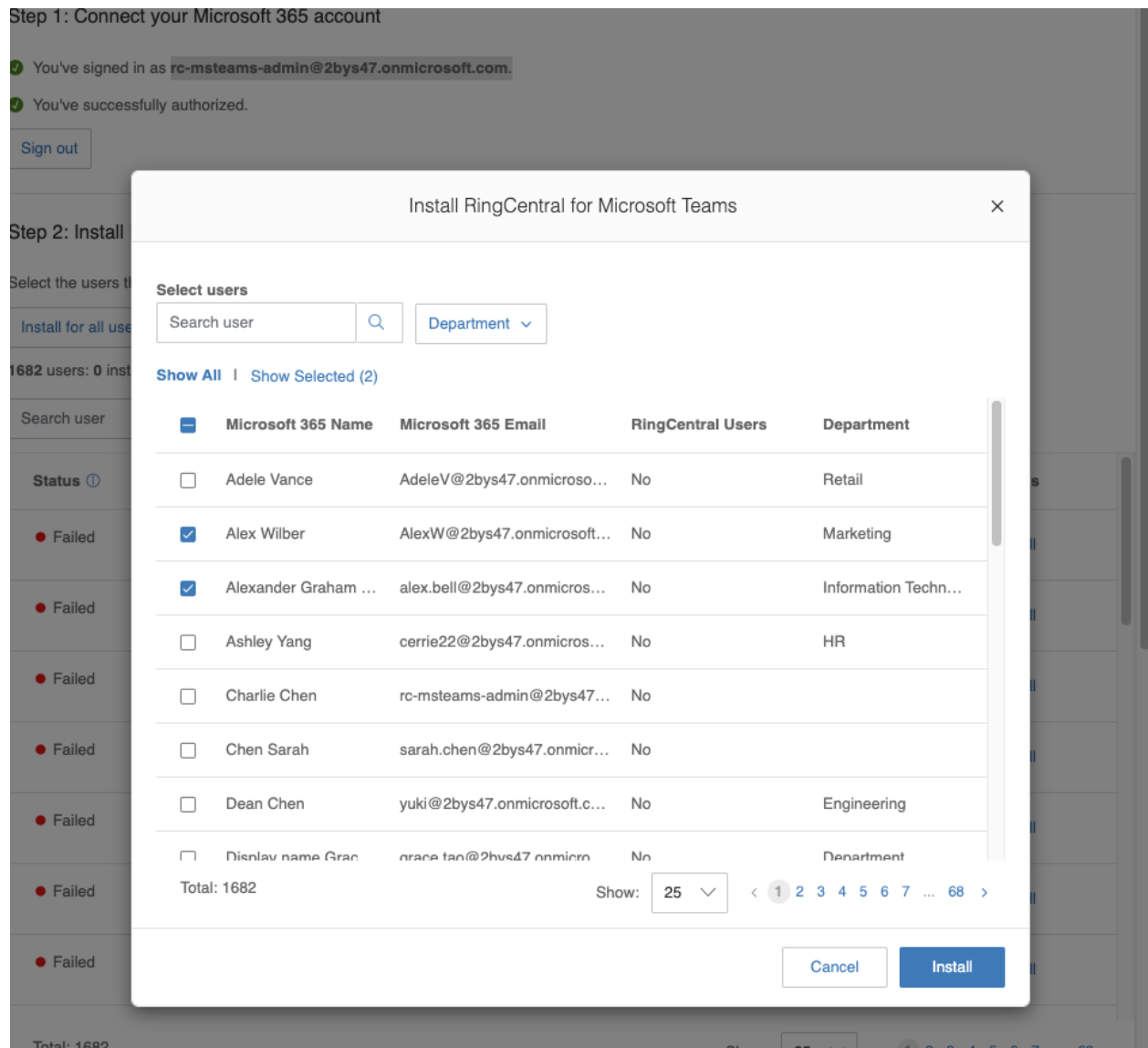

2.2: Install for selected users

To install for a single or selected users in your Microsoft organization, you can click on the **Install for selected users** button.

You will notice a window will be prompted where you can select which users in your Microsoft organization should receive the embedded app. You can select a single user, select based on department or search and select as desired. Once the selection is complete, click on the **Install** button to start the installation.

Step 1: Connect your Microsoft 365 account

✓ You've signed in as **rc-msteams-admin@2bys47.onmicrosoft.com.**

✓ You've successfully authorized.

Sign out

Step 2: Install

Select the users t

Install for all use

1682 users: 0 inst

Search user

Status ⓘ				s
● Failed				
● Failed				
● Failed				
● Failed				
● Failed				
● Failed				
● Failed				

Total: 1682

Install RingCentral for Microsoft Teams ✕

Select users

Search user 🔍   Department ⌄

Show All | **Show Selected (2)**

☐	Microsoft 365 Name	Microsoft 365 Email	RingCentral Users	Department
☐	Adele Vance	AdeleV@2bys47.onmicroso…	No	Retail
☑	Alex Wilber	AlexW@2bys47.onmicrosoft…	No	Marketing
☑	Alexander Graham …	alex.bell@2bys47.onmicros…	No	Information Techn…
☐	Ashley Yang	cerrie22@2bys47.onmicros…	No	HR
☐	Charlie Chen	rc-msteams-admin@2bys47…	No	
☐	Chen Sarah	sarah.chen@2bys47.onmicr…	No	
☐	Dean Chen	yuki@2bys47.onmicrosoft.c…	No	Engineering
☐	Display name Grac	grace.tao@2bys47.onmicro	No	Department

Total: 1682   Show: 25 ⌄   ‹ 1 2 3 4 5 6 7 … 68 ›

Cancel   **Install**

Total: 1682   Show: 25 ⌄   ‹ 1 2 3 4 5 6 7 68 ›

The installation might take several minutes so all the buttons in Step 2 will be temporarily disabled and you can feel free to multitask by switching tabs or apps.

Once completed, similar to Step 2.1, you will notice a confirmation with a summary of the installation status, and a user table is displayed. You can view the users installations status, search for a user, and sort or filter the table as desired.

Additionally, you will also receive an email to your RingCentral email address that will contain the installation summary and more details.

2.3: Quick install for a single user

You can choose to install the embedded app to a single user from the user table as well. Click on the **Install** button under the **Actions** column to do so.

2.4: Manually refresh the user list

Whenever there is any update to your Microsoft organization such as users being added/removed, or to just refresh the user table due to an error you can click on the refresh icon next to the installation summary as shown below.

During the refresh, all buttons in Step 1 and Step 2 will be temporarily disabled. However, you can still view/ sort/ search/ filter the user table.

Refreshing might take several minutes depending on the number of users in your organization, so you can feel free to multitask by switching tabs or windows and come back to view the refreshed user table.

2.5: Uninstall the embedded app for a single user

If for any reason you would like to uninstall the RingCentral embedded app from your user's Teams app desktop and web, you can click the **Uninstall** button under the **Actions** column in the user table to do so.

Please note that the Uninstall button will only appear against a username if the installation has been previously successful.

2.6: Pin the RingCentral embedded app in your users Teams app

As an admin, you can follow the steps outlined in this [Microsoft documentation](#) for pinning the RingCentral embedded app within the Teams app of your users. By pinning, the embedded app will always be accessible from their left-side menu within Teams.

Step 3: Download the desktop plugin package and enable mobile mode

Step 3.a: Download the desktop plugin package for the embedded app

To pair with the RingCentral embedded app, RingCentral also offers a headless application called the **RingCentral for Teams desktop plugin** to make and receive phone calls, and manage active call controls.

The desktop plugin resides on the users desktop and runs as a background application. Whenever a user initiates an outgoing call, the desktop plugin is launched to display the active call controls such as mute, hold, hangup, etc as well as displays call controls to answer or ignore whenever there is an incoming call.

As an administrator, you can download the desktop plugin file package from Step 3 based on the OS and leverage your company's end-point management solution remotely install it on your users desktops. An example of an IT tool is as follows.

1. [VMWare-Workspace One](#)
2. [InTune by Microsoft](#)
3. [JAMMF](#)

Step 3: Download RingCentral's desktop plugin and turn on light mode for mobile app

To make and receive calls, download and install the desktop plugin and enable the mobile mode for users in your organization.
Note: You can skip this step if your organization is using the RingCentral for Microsoft Teams Direct Routing.

3.a Download desktop plugin

Download plugin (Windows)

Download plugin (Mac)

Next, follow your company's process to make the plugin available to your organization.

3.b Set up Teams mobile mode ⓘ

Show a custom view for enabling mobile mode to the User List in your Admin Portal.
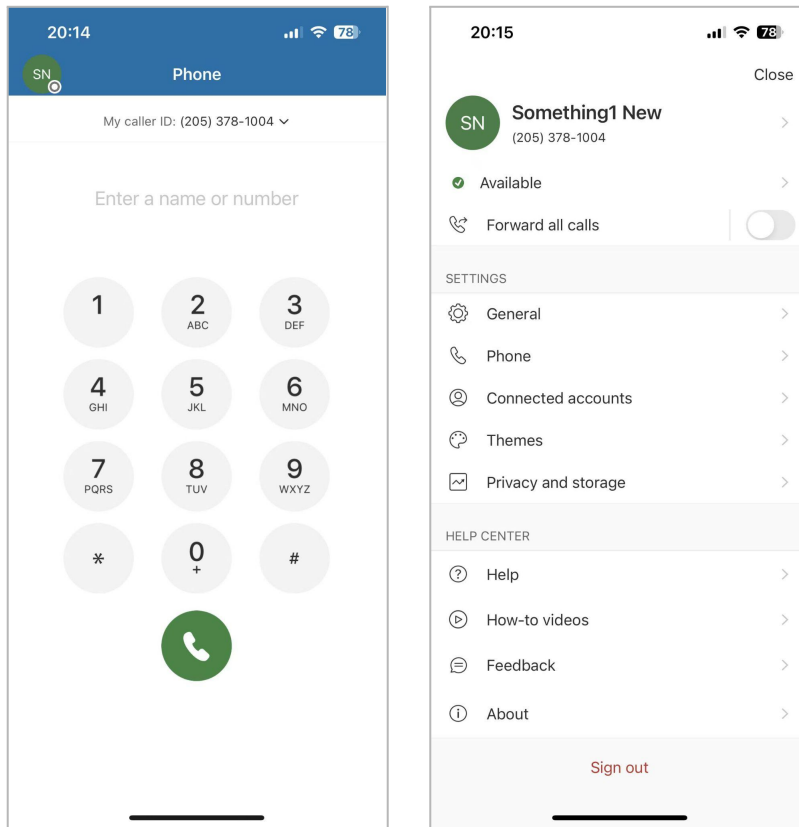
◯ Show custom view

For your reference, below are the desktop plugin package download links:

● [For Windows](#) (MSI Format)
● [For MacOS](#) (PKG Format)

Step 3.b: Enable mobile mode for RingCentral mobile mode

To make and receive calls with RingCentral for Teams embedded app on mobile, users require the [RingCentral mobile app](#). For a lightweight, seamless user experience, administrators can enable a **mobile mode** for the RingCentral mobile app for all users in their organization.
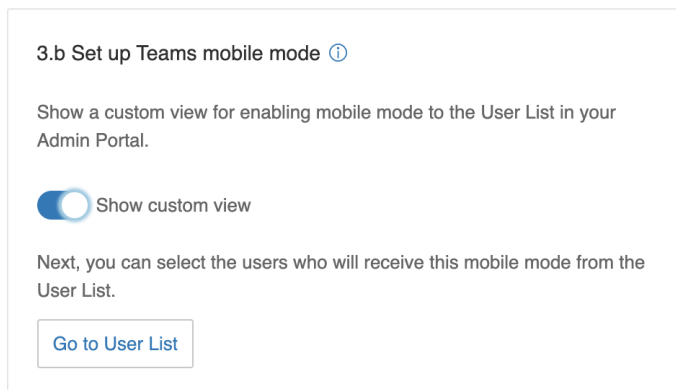
The mobile mode applies a focused call-only experience to their existing RingCentral mobile app.

Any message, video, and other RingCentral features are hidden in the app so the user can stay focused on the embedded app for all their telephony needs.

To apply the mobile mode, follow the instructions listed below

1. Enable the Custom View toggle as shown in the image

Note: You need to have a User administrator or Super administrator role in RingCentral Admin Portal to perform this task.

2. Click on the **Go to User List button**

3. You will be navigated to the [Users tab](#) within RingCentral Admin Portal. Here, you will see the toggles to enable the mobile mode for users in your organization

   Note: If you do not see the mobile mode toggles immediately, please refresh the page and check again.

Note: If you do not see the toggles immediately after navigation, please refresh the page and check again.
4. You can enable the toggle for a single user or you can select users in bulk and click on the 'MS Teams Mobile Mode' button to enable for more than one user

5. Whichever user you have enabled the mobile mode will see a focused call-only interface in their RingCentral mobile app.

Presence Sync in Embedded App

The RingCentral Presence Sync enables the integration of Microsoft Teams Presence into your RingCentral for Microsoft Teams embedded app, as well as the presence status of MS Teams users who are on active calls into the Teams environment.
You can now see if specific users or stakeholders in your organization are available online or engaged in another call. Presence is updated in real-time on the desktop and web application versions.

Please refer to the [Presence sync admin guide](#) to set up the presence sync service for your organization**.**

Additional notes and Known issues

1. **RingCentral and Microsoft 365 email matching for users**

   By design, the Admin Portal matches the RingCentral email address to Microsoft's user principal name (UPN) and then to Microsoft's primary email (outlook email). Only the matched users can
   a. Receive chat notifications in the Activity tab
   b. View the Teams personal contact list in the Embedded App

Workaround: The admin can update the emails in either RingCentral or Teams. Otherwise, the users will be auto-matched within a maximum of 12 hours.

Please follow the instructions below to update Teams email address from Azure Admin portal
1. Sign in to [Azure Admin Portal](#)
2. Navigate to **Azure Active Directory**
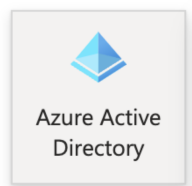
3. Select **Users** from the left side menu
4. Search for the user for whom you would like to change the email address
5. Select **Edit properties**
6. Scroll down and update the **Email** field

2. **Notifications when the embedded app is logged into multiple devices**

   The chat notifications are sent per user account and not by the number of devices a user is logged into. If the user is signed into the embedded app with the same account on multiple devices, the message will be pushed to all the devices.

3. **Notifications will be paused after 7 days**

   Daily unread messages will be paused if the user has not signed in or used the embedded app in a period of more than 7 days. Once any activity is resumed by the user in the embedded app, the messages will start to deliver.

   Also note that a message saying "How are you doing?" will be posted to users as a check-in when there is no activity for more than 7 days
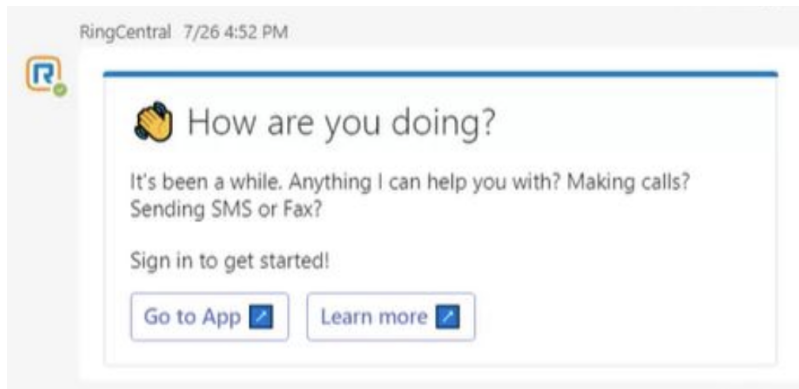
4. **App not fully configured**

   If an end user in your organization reaches out regarding the error stating that the embedded app is not fully configured, please make sure that Step 1 outlined in this document is properly completed.
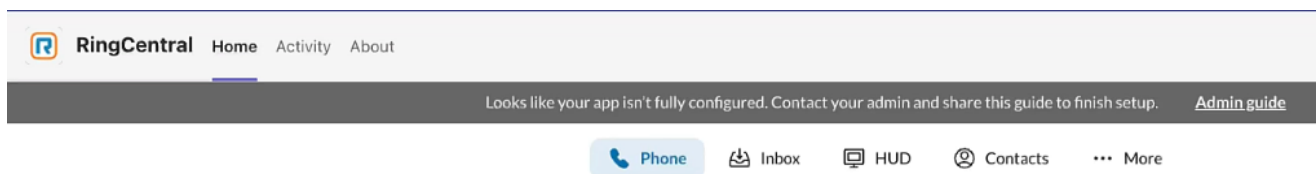
   In some cases, this error might also show up when the administrator has changed or updated their roles in Microsoft. The changes will take up to 24 hours to take effect during which users might encounter the above error message.

5. **Microsoft and RingCentral account connection**

   Currently, we do not support connecting multiple Microsoft accounts/tenants to a single RingCentral account and vice versa. This will be improved in future versions.

6. **Failed to get Microsoft license information**

   While establishing connection between RingCentral and Microsoft, if you are seeing an error stating failure to get license information, it is possible that you might not have a valid Microsoft 365 license required to install the embedded app. The app does not support Microsoft Teams Rooms Pro and Rooms Basic licenses.

7. **Desktop plugin upgrades - Admin-deployed packages**

If the desktop plugin is installed using the packages provided in the Admin Portal, please note that the plugin will *not* be auto-updated. Admins need to leverage the end-point management used for initial deployment for the subsequent upgrades.