VERITAS™

Third-Party Connectors

Jive

User Guide

MERGE1

LEGAL NOTICE

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CHAPTER 1

Introduction

This chapter represents:

- Overview
- Pre-Requisites
- Accessing the Data Connectors

Overview

Microsoft 365 lets administrators import and archive third-party data from social media platforms, instant messaging platforms, and document collaboration platforms, to mailboxes in your Microsoft 365 organization.

Pre-Requisites

Many of the implementation steps, required to archive Jive data are external to Microsoft 365 and must be completed before you can create the connector in the compliance center.

- Create a Merge1 account by accepting their terms and conditions for Jive connector. Here you will need to contact Veritas Customer Support. You will sign into this account when you create the connector.
- Create a Jive Add-on at

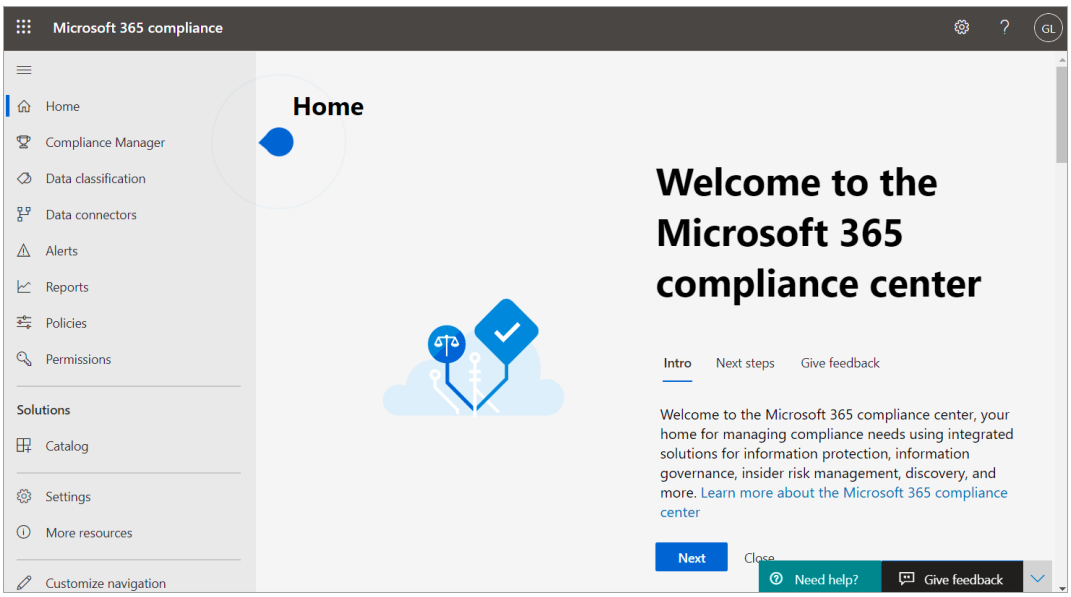
  `https://<YOUR INSTANCE URL>/addon-services!input.jspa` to securely extend the Jive platform with third-party integrations.

  For step-by-step instructions on how to create the application, see *Creating a Jive Application*.
- The user, who creates the Jive connector in Step 1 (and completes it in Step 3) on the Microsoft site, must be assigned to the Mailbox Import Export role in Exchange Online. This role is required to add connectors on the Data connectors page in the Microsoft 365 compliance center. By default, this role is not assigned to a role group in Exchange Online. You can add the Mailbox Import Export role to the Organization Management role group in Exchange Online. Or you can create a role group, assign the Mailbox Import Export role, and then add the appropriate users as members. For more information, see the Create role groups or Modify role groups sections in the article "Manage role groups in Exchange Online".

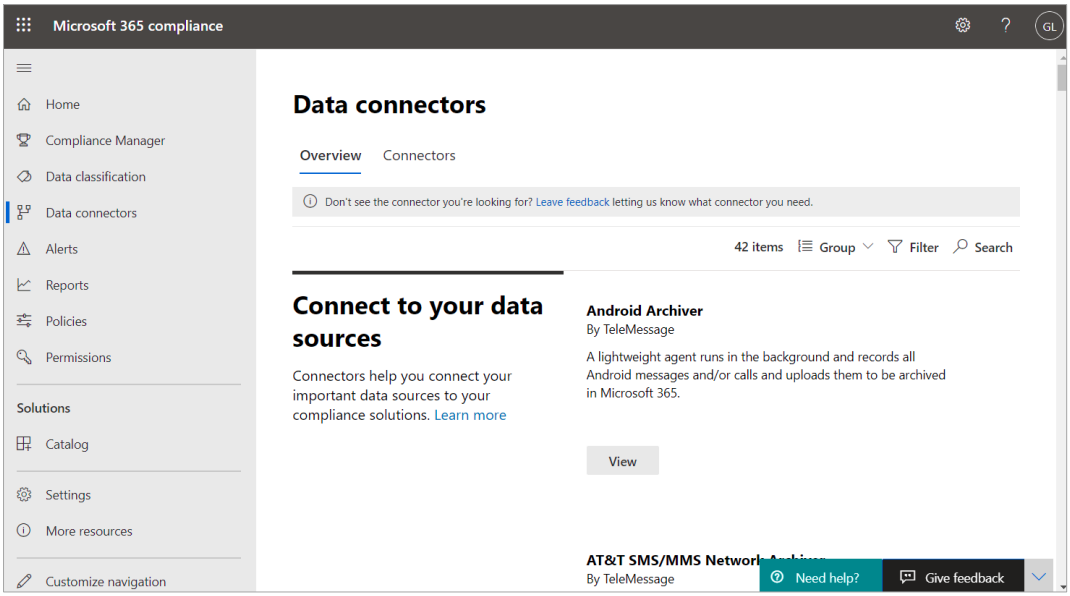
Accessing the Data Connectors

To access the Data Connectors, follow the steps below:

1. Go to https://compliance.microsoft.com web page.

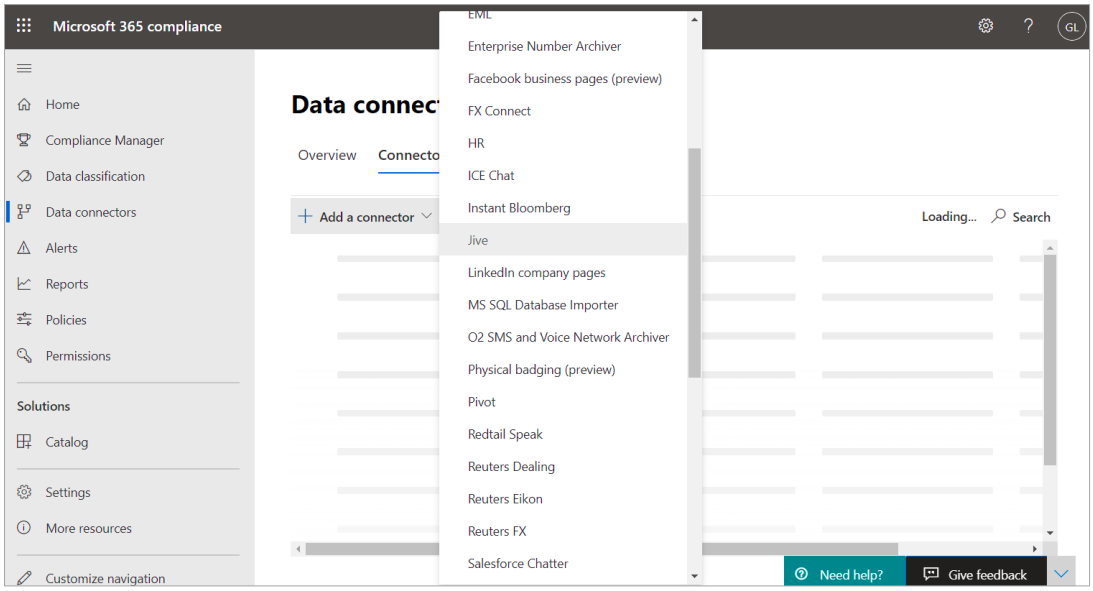


2. Navigate to **Data Connectors**. You will be presented with the **Overview** section of the Data Connectors.



3. Go to the **Connectors** tab.

4. Click the **Add new connector** button. A pop-up list of connectors will open.



5. Select the **Jive** from the list. For more details on how to set up the connector see *SETTING UP JIVE*.

CHAPTER 2

Setting Up Jive

This chapter represents:

- Overview
- Terms of Service
- Connector Name
- Connection to Source

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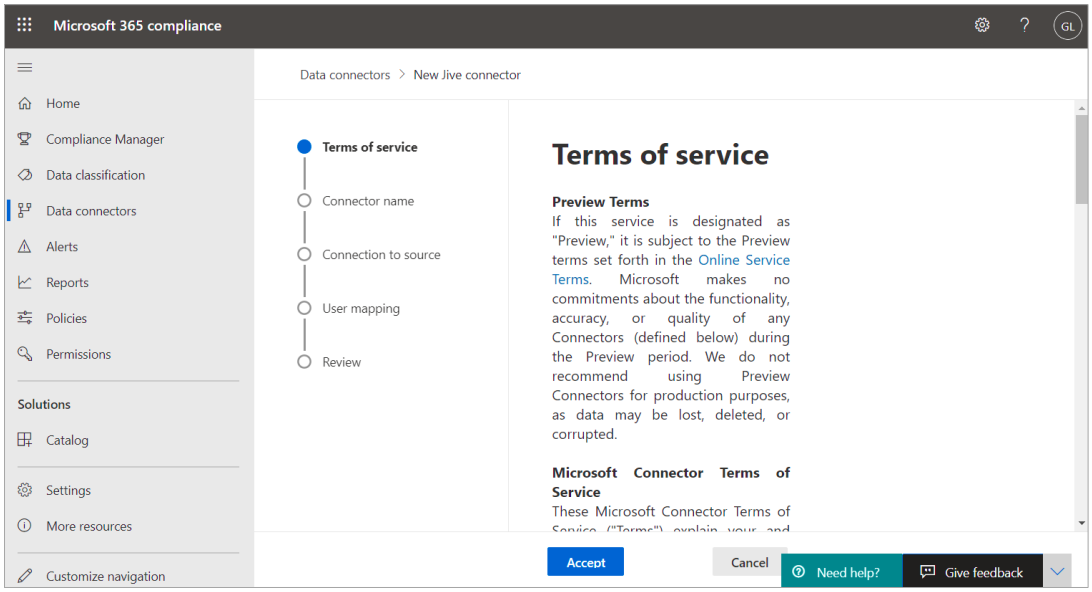
Overview

To set up a new Jive connector, you need to complete the following steps:

- Terms of Service
- Connector Name
- Connection to source
- User Mapping
- Review.

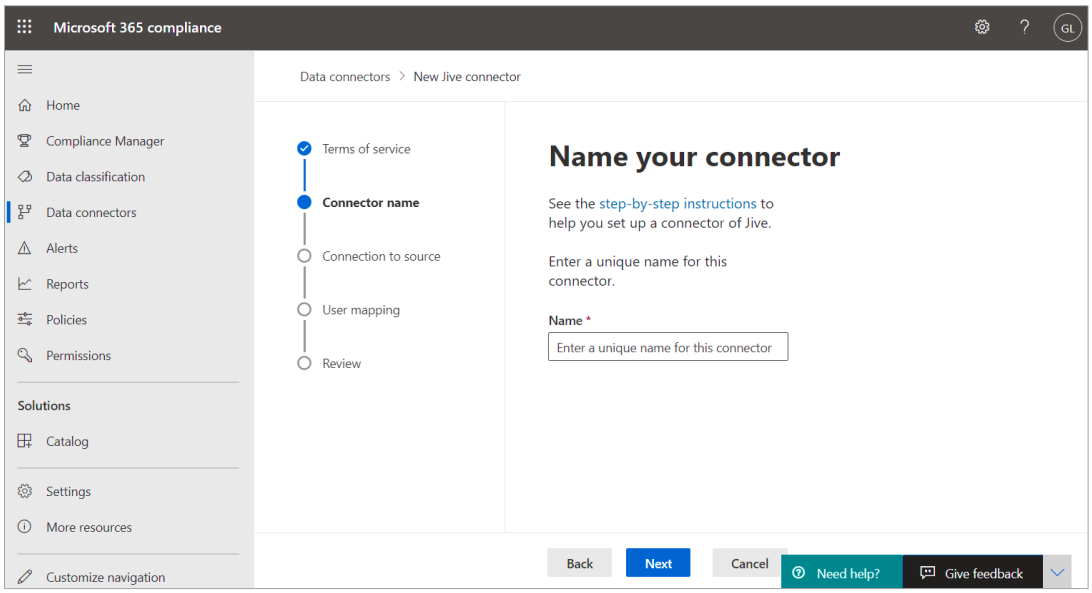
Terms of Service

For terms of service, read the terms carefully and accept them by clicking the **Accept** button.

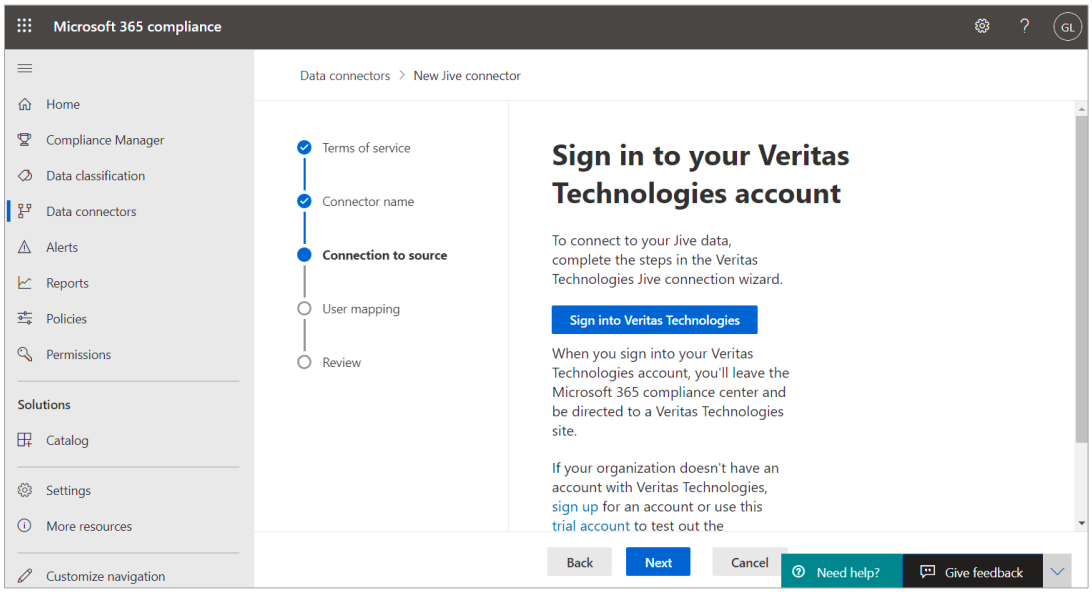


Connector Name

To create a connector, define a unique name that can represent or identify the connector:



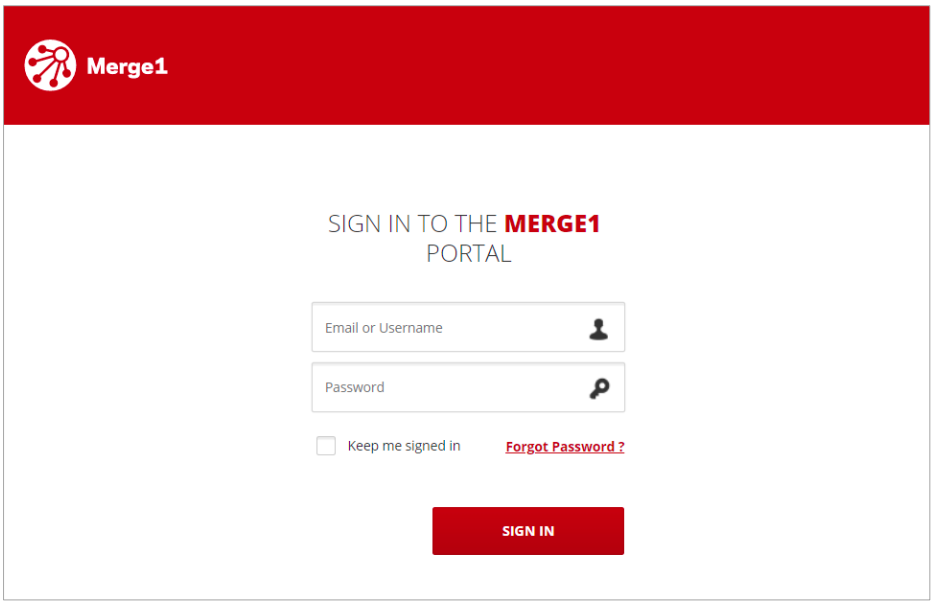
Click **Next**, to be navigated to the **Sign in to your Veritas Technologies account** page.



By clicking **Next**, you will be redirected to the Veritas Merge1 site. For more details on how to manage the source connection, see *Connection to Source*.

Connection to Source

Use the Login screen to access Merge1 or retrieve a forgotten password.



Jive uses a role-based access control model to ensure the security of the data stored in the system. Only users with the appropriate access rights will be able to enter the system, access specific data, and perform certain activities.

Signing In

To sign in to Merge1 provide the following credentials:

- Email and Username
- Password.

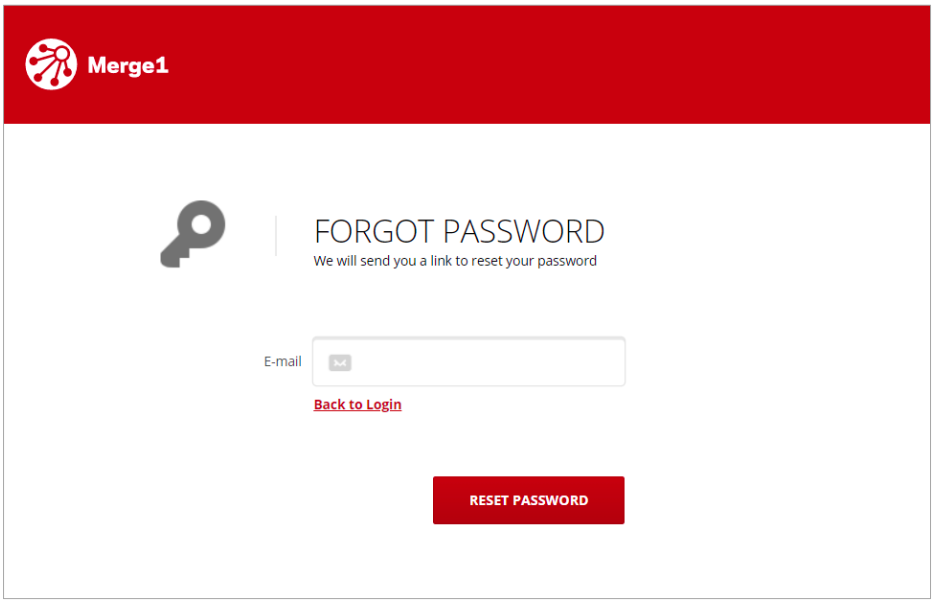
Password Recovery

The system is designed to provide the functionality of retrieving user password in case of forgetting or for some other reason. Passwords are retrieved through the identification link sent to the user's email address contained in the user profile. When a user clicks the link in the email, user's identity will be verified, and an opportunity for defining new password will be provided.

To recover the password, follow the steps below:

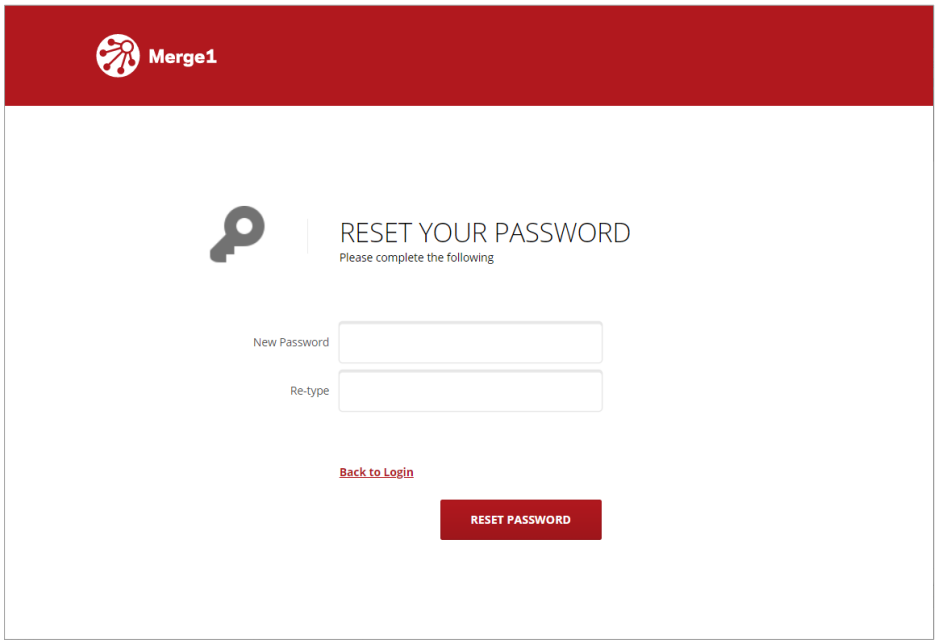
1. Click the **Forgot Password** link in the **Sign in** window.

2. Provide an email associate with the Merge1 account so that the recovery link is sent to this address.



3. Check your email and click the recovery link.

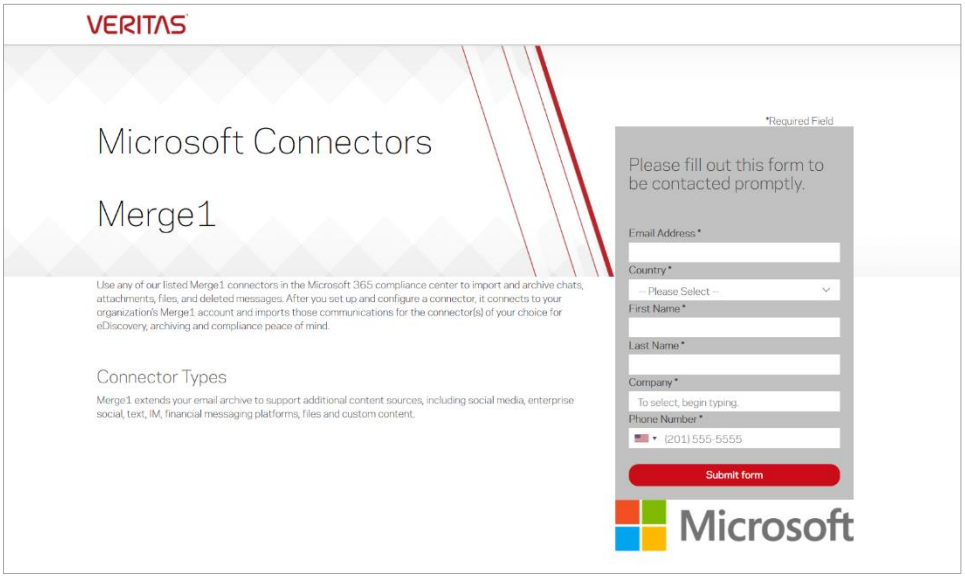
4. Provide a new password and re-enter it for verification.



Creating an Account

If you are new to Merge1 and do not have an account:

1. Request a call from Veritas Technologies by filling out the following information:
   - Email Address
   - Country
   - First Name
   - Last Name
   - Company
   - Phone Number



2. Click **Submit form** and a Veritas Sales Representative will follow up with you by phone or e-mail.

3. After getting approval you can make use of Jive from the Merge1 product.

Now, when you are redirected to the Veritas Merge1 page, you can start configuring the Jive connector. For more details on how to configure the connector, see *CONFIGURING THE JIVE CONNECTOR*.

CHAPTER 3

Configuring the Jive Connector

This chapter represents:

- Creating a Jive Application
- Configuring Jive Connector
- Monitored Users
- Targets
- Settings
- User Mapping
- Review

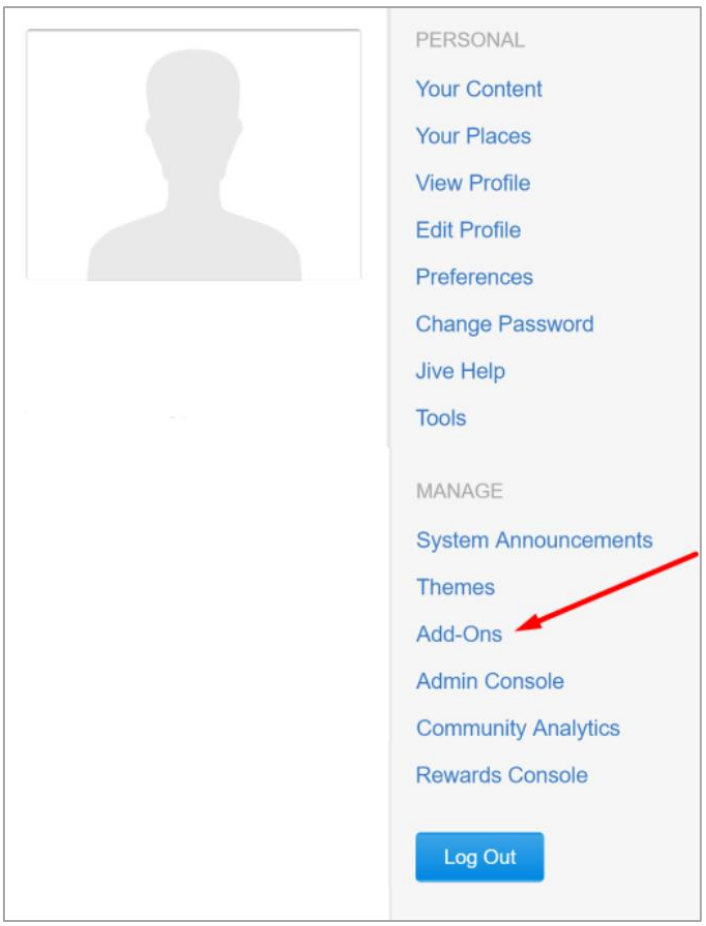
Creating a Jive Application

To configure the connector, you must already have created an application in Jive. If you do not have an application created for Jive, follow the steps below:

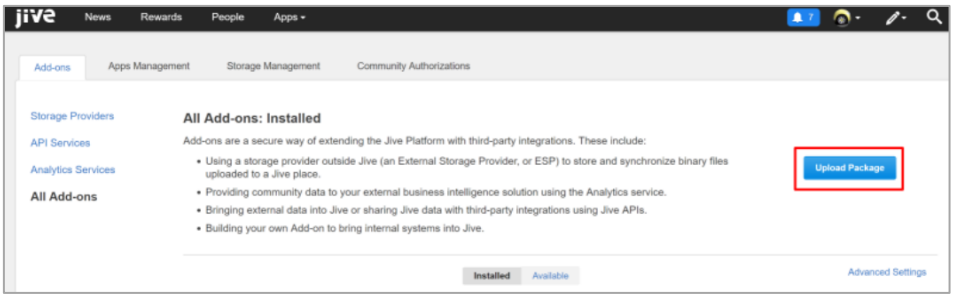
1. Create an add-on package. Instructions and samples can be found at https://community.jivesoftware.com/docs/DOC-99941. When prompted for a redirect URL, set it to the URL of your local Merge1 environment with the following extension: "`/Configuration/OAuthCallback`". For example: https://veritaslabs.com/Configuration/OAuthCallback/. Please note that only hostnames should be used in the Callback URL; IP addresses will not work.

2. Log into your Jive environment. You will need to be a community manager or can install add-ons for personal use on this Jive server. We suggest you use the Jive Developer Sandbox for testing.

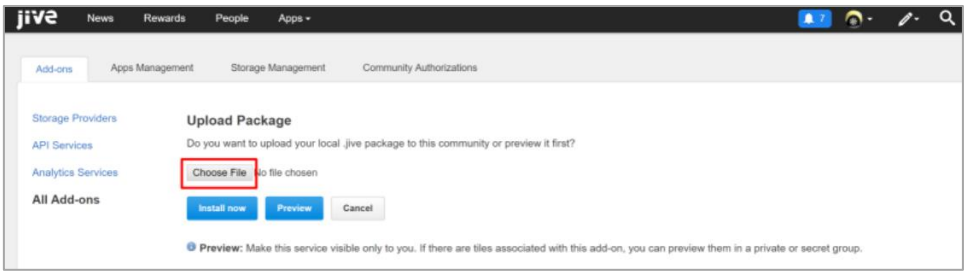
3. Go to the **Add-Ons** section of the account.



4. Click **Upload Package**.



5. Click **Choose File** and select the add-on package to upload.



6. Once you have selected the file, click **Install**.

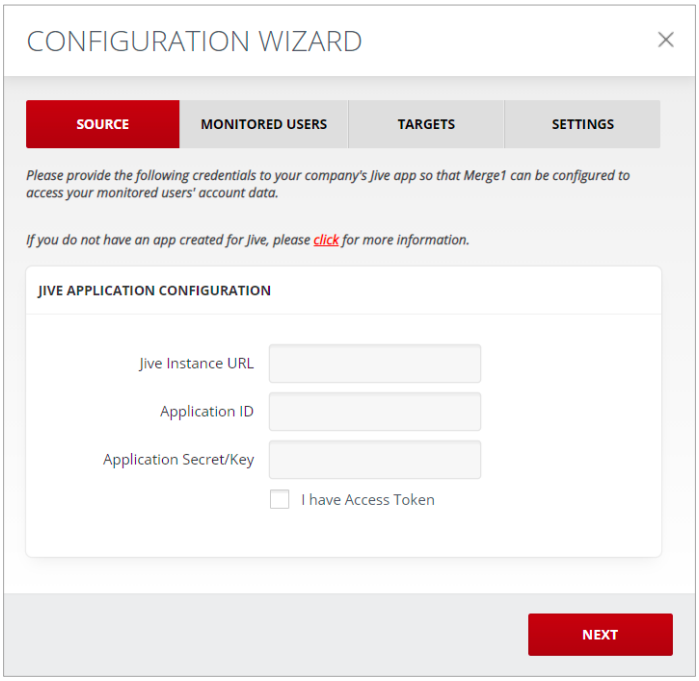
7. When the package is installed, go to **All Add-ons: Installed**, click the settings icon of the necessary add-on and go to **View Client ID and Secret**.

8. Copy the **Client ID** and **Client Secret**.

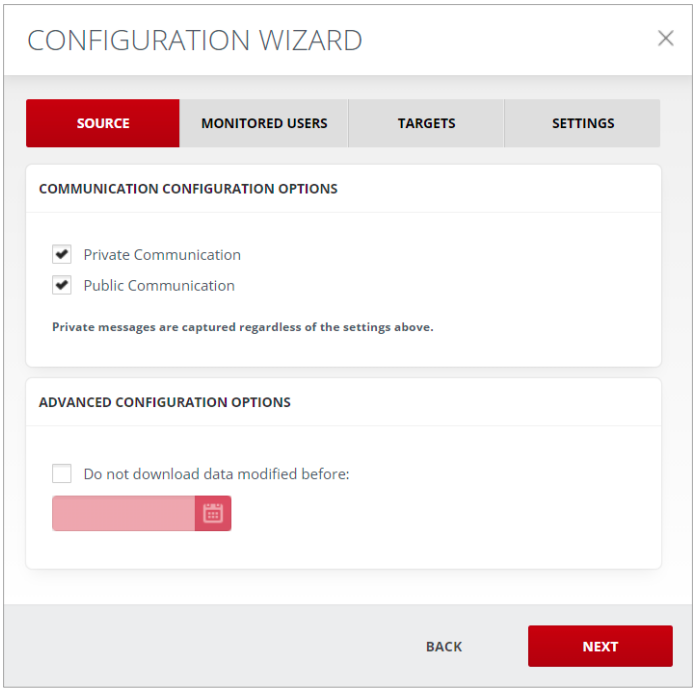
Configuring Jive Connector

For configuring the Jive Connector, follow the steps below:

1. Provide **Jive Instance URL** of your company.
2. Fill in the **Application ID** field with the **Client ID** copied previously.
3. Enter the **Client Secret** in the **Application Secret/Key** field.
4. Click **Next**.



When the credentials are entered and are validated, the **Communication Configuration Options** and **Advanced Configuration Options** of Source Configuration wizard will open.



Communication Configuration Option - This option allows choosing what types of group chats from Jive will be imported.

- When **Private Communication** is checked, only group chats of private type will be imported.
- When **Public Communication** is checked, only group chats of public type will be imported. Both options can be selected simultaneously. Note that one-on-one messages will be imported regardless of these settings. These options apply only to group chats.

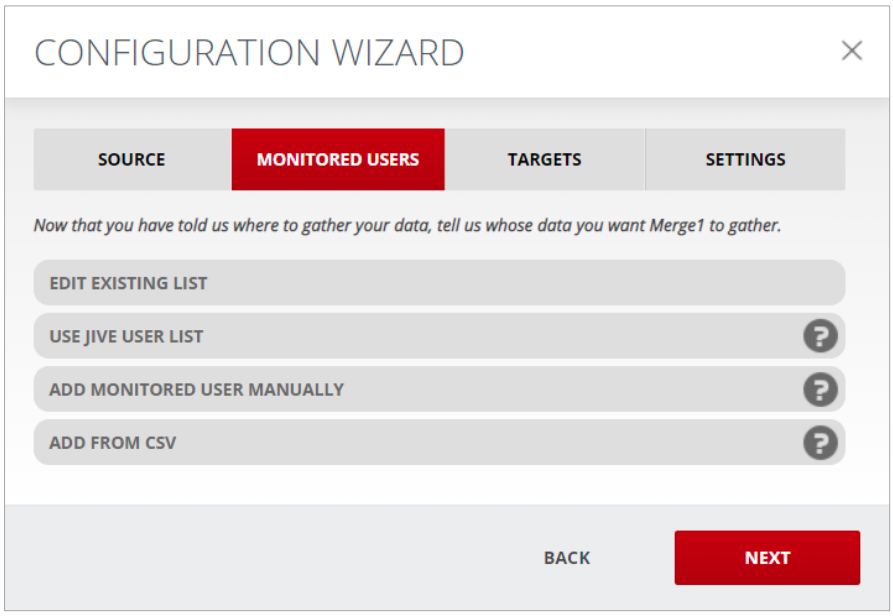
Checked **Do not download data modified before** will ensure that old or irrelevant data is excluded. For example, if the date selected is 9/1/2020, it will not retrieve any data modified before September 1 of 2020. Only the data after 9/1/2017 will be retrieved, archived, and imported.

By clicking **Next**, you will be navigated to the *Monitored Users* tab.

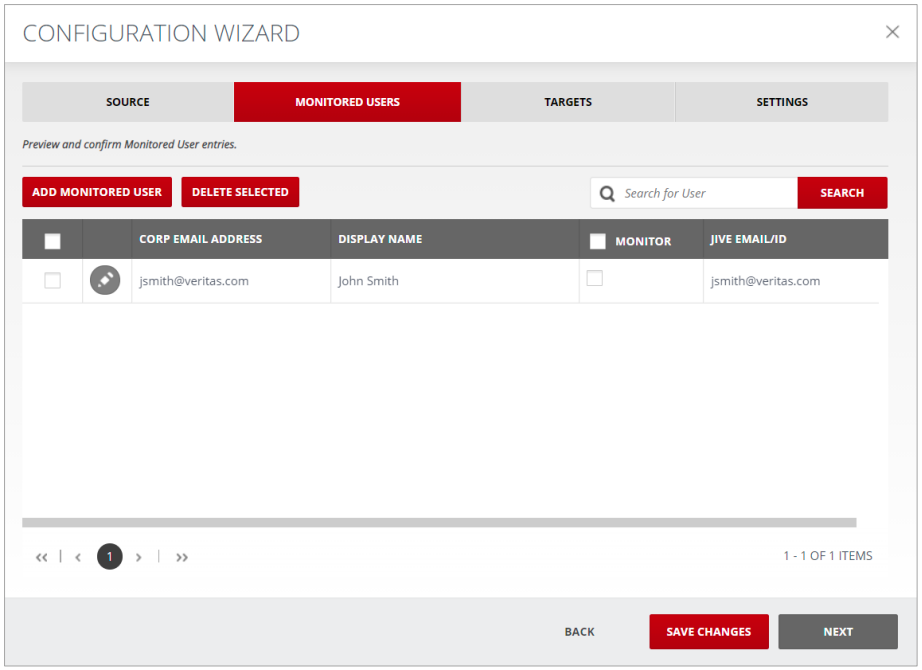
Monitored Users

Monitored Users are individuals whose data is collected by Merge1. Here you select whose data you want Merge1 to gather.

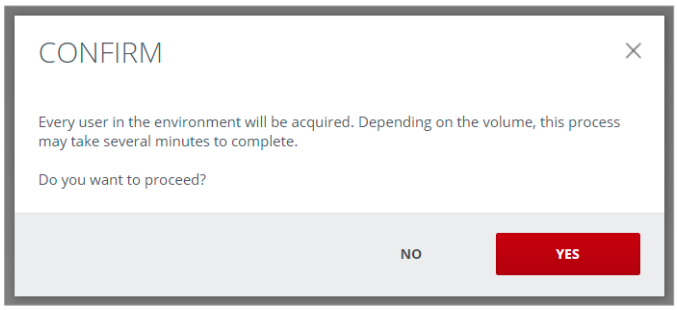
- Edit Existing List
- Use Jive User List
- Add Monitored User Manually
- Add from CSV.



Selecting **Edit Existing List** will allow editing the already existing list, i.e. add monitored users, Delete Selected, and then confirm the entries.



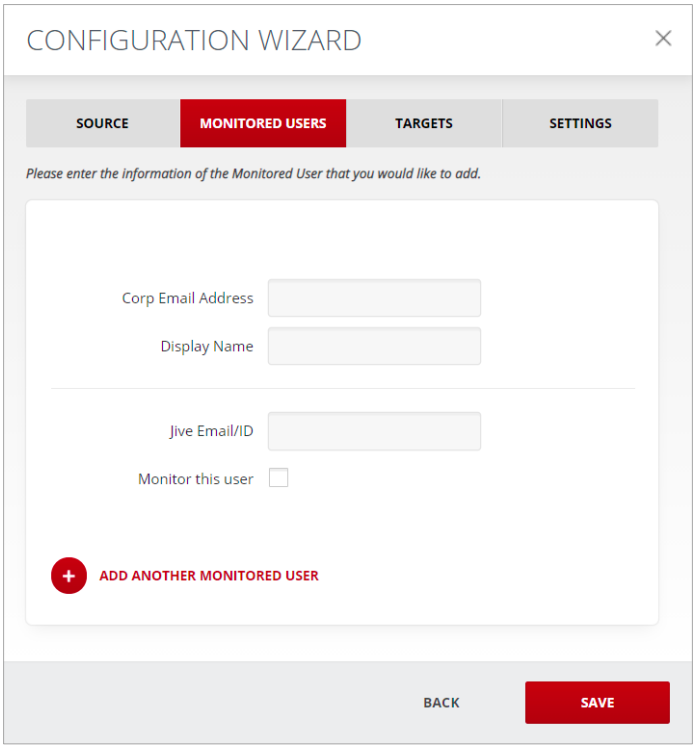
Once **Use Jive User List** is selected and proceeded, confirmed every user in the environment will be acquired.



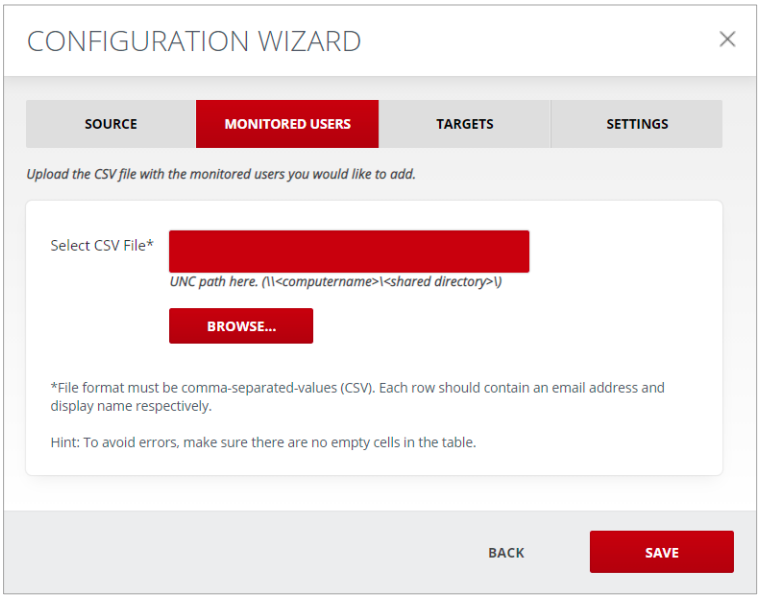
By selecting **Add Monitored Users Manually** the data entry form pop-up will open. Fill in the following fields and click **SAVE**:

- Corporate Email Address
- Display Name
- Jive Email/ID.

Note that by activating **Monitor this user** checkbox the newly added user will be monitored.



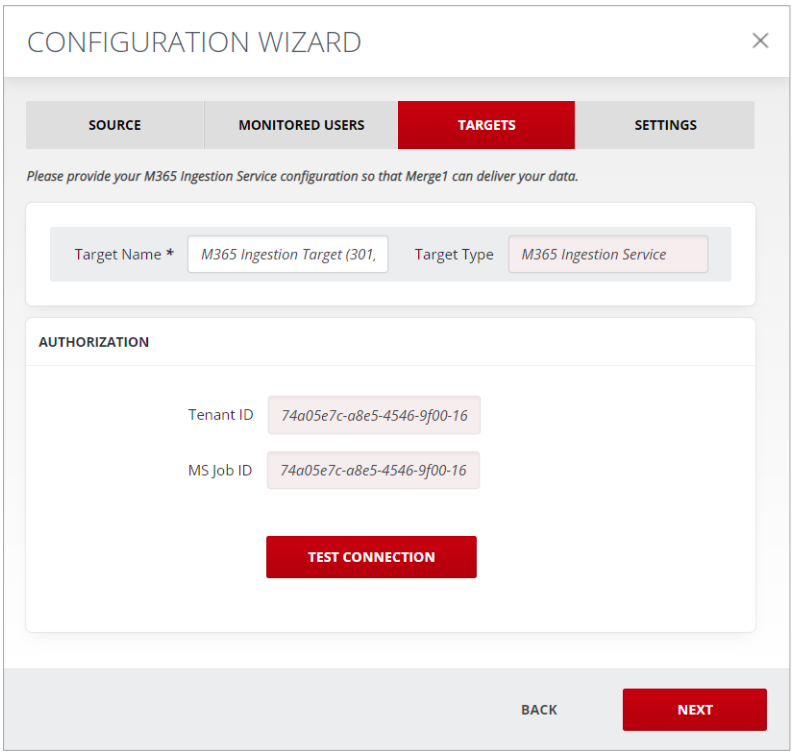
By selecting **Add from CSV**, you can upload the CSV file with the monitored users you want.



By clicking **Next**, you will be navigated to the *Targets* tab of the Configuration Wizard.

Targets

The information required for configuration of the targets is pre-populated on this screen. This information cannot be edited.



By clicking **Next**, you will be navigated to the *Settings* tab.

Settings

The final step for the Importer Configuration Wizard is the Settings. Under this tab you will have the opportunity to configure the following:

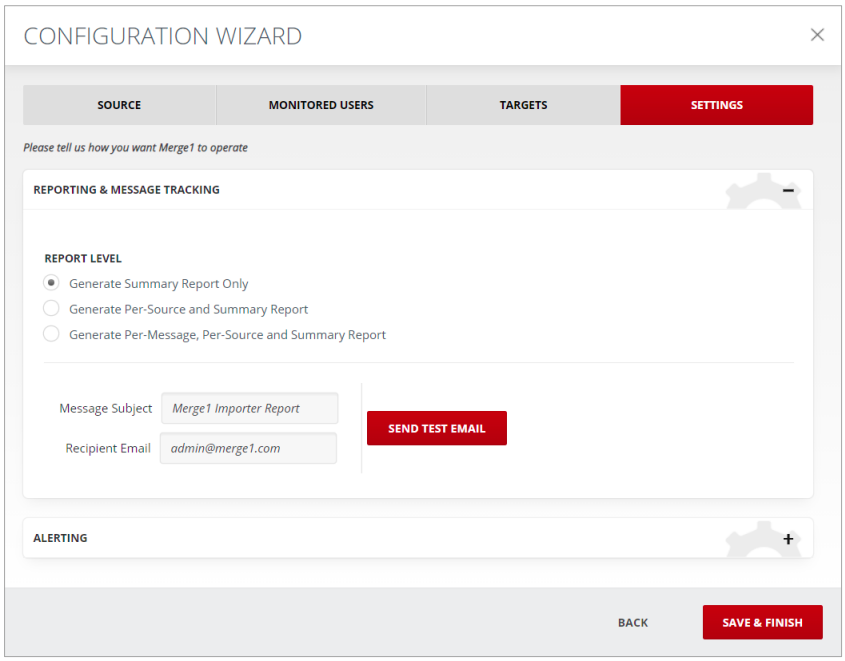
- Reporting & Message Tracking
- Alerting.

Reporting & Message Tracking

The following section of the Settings tab refers to email reports, which may be used to deliver statistical information via email.

1. **Report Level:** In Merge1 you will find three types of Report Level, which set the level of details. You can:
   - **Generate Summary Report Only**. Summary reports include Source Statistics and Message Statistics. Source Statistics includes the number of unprocessed, quarantined, failed, and imported sources. Message Statistics includes the number of unprocessed, failed, successful, excluded, and ignored messages.
   - **Generate Per-Source and Summary Report**. This report type in addition to the Summary Report includes statistics for each source. For each source there is statistics for unprocessed, processed, imported, failed, monitored users (if applicable).
   - **Generate Per-Message, Per-Source and Summary Report**. This report is useful only for file connectors. The per message report in addition to the reports described above is generated only in case a message has failed.

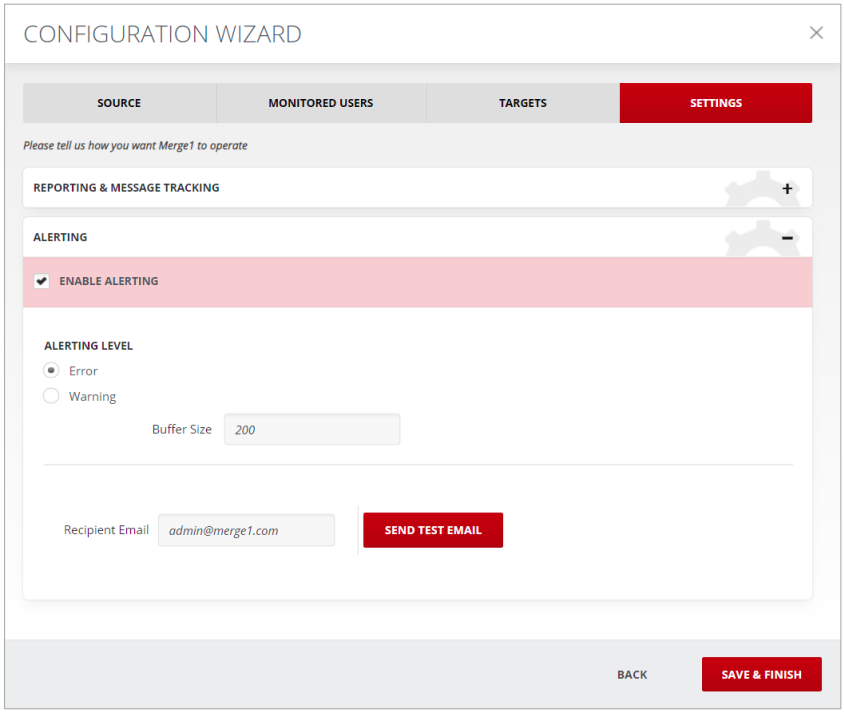
Reports are based on the activities that can be captured from the connectors.



2. **Message Subject:** Enter the subject for the report message.
3. **Recipient Email:** Enter an email address for delivering reports.

Alerting

Merge1 can automatically create an alert in case there are issues during an import process.



When enabled, there are two levels of alerting:

- **Error** - Alert is sent when an Error is registered in the logs.
- **Warning** - Alert is sent when a Warning is registered in the logs.

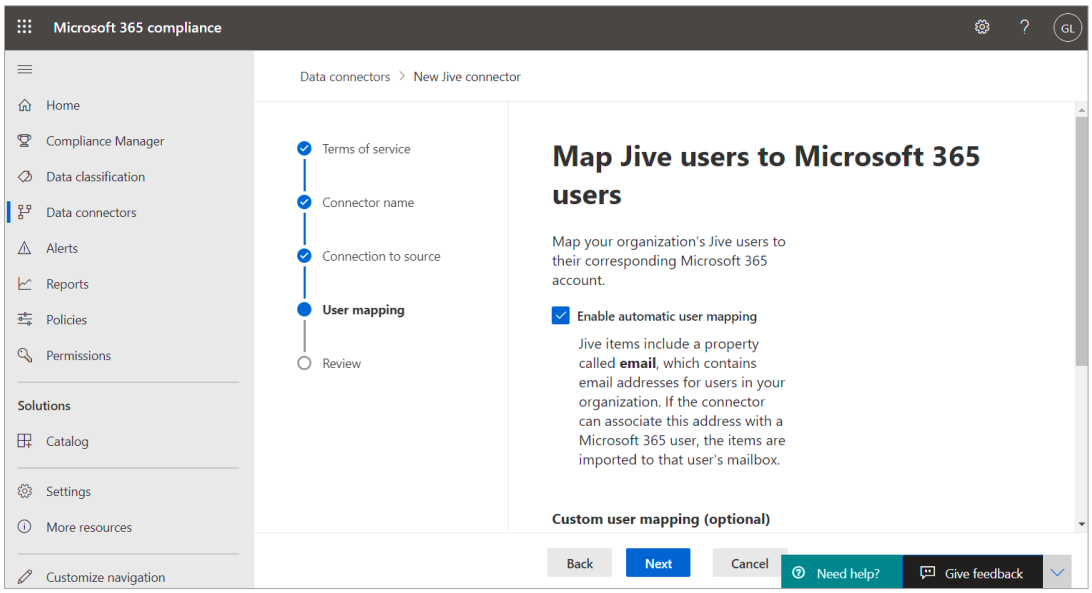
To configure the alerting, specify the **Buffer Size**.

You can also test the connection by entering the **Recipient Email**. Click **Send Test Email**.

By clicking **Save & Finish** you will be navigated to the *User Mapping* section of the M365 Compliance Center.

User Mapping

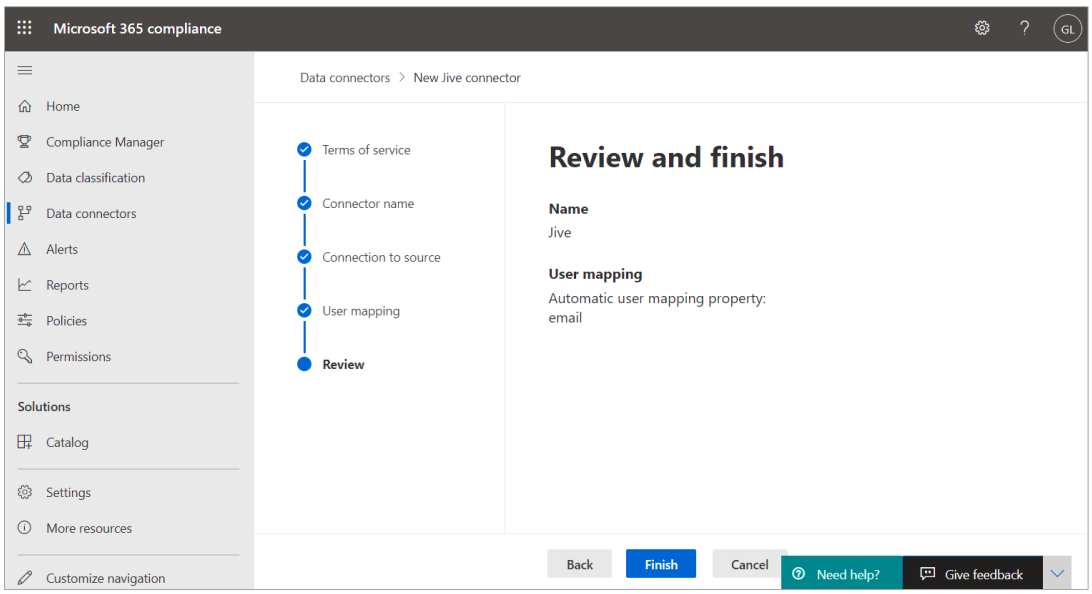
Provide the required user mapping.



By clicking **Next**, you will be navigated to the *Review* section.

Review

Here you can review connector name that you configured and the type of the User Mapping you have selected. Once you have reviewed the accuracy of this information, click the **Finish** button to complete the configuration. Otherwise, click **Back** and make any modifications.



Congratulations! You are all set up!