

VERITAS[™]

Third-Party Connectors

Redtail Speak

User Guide



MERGE1

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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

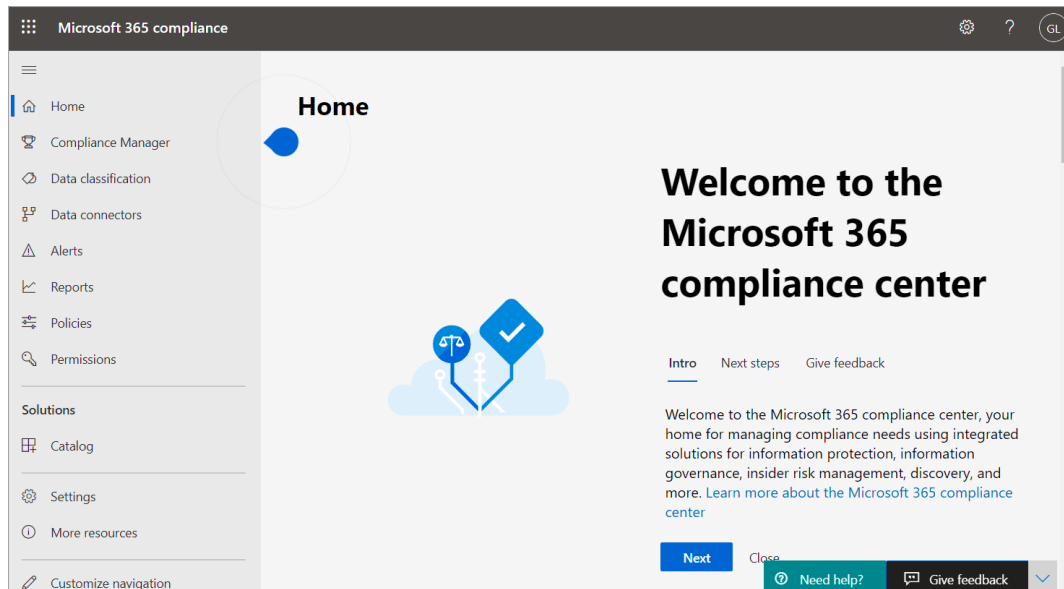
Many of the implementation steps, required to archive Redtail Speak data are external to Microsoft 365 and must be completed before you can create the connector in the compliance center.

- Create a Merge1 account by accepting their terms and conditions for Redtail Speak connector. Here you will need to contact [Veritas Customer Support](#). You will sign into this account when you create the connector.
- The user, who creates the Redtail Speak 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”.

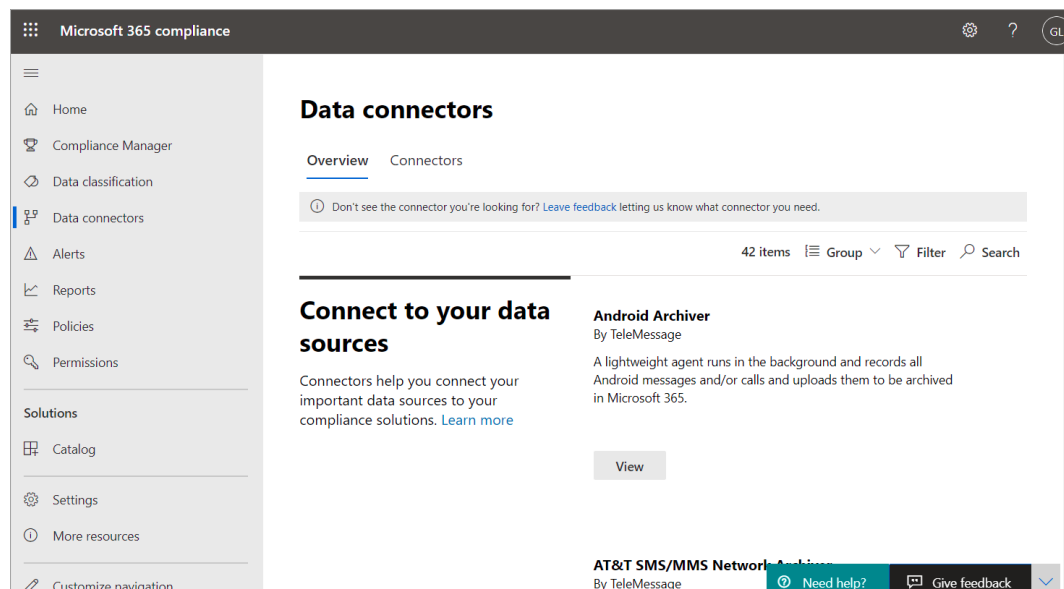
Accessing the Data Connectors

To access the Data Connectors, follow the steps below:

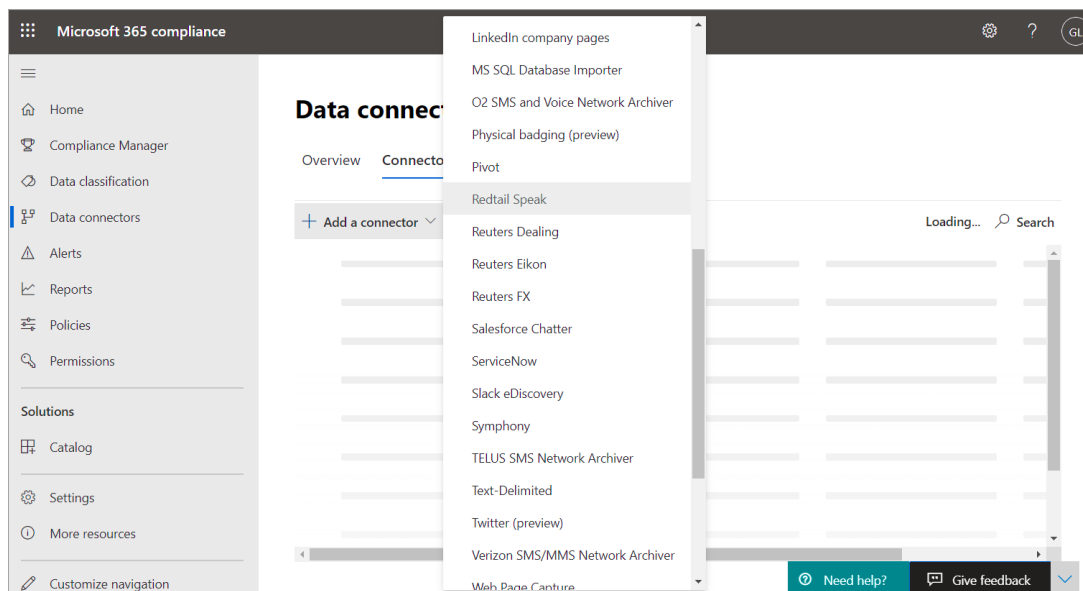
1. Go to <https://compliance.microsoft.com> web page.



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 **Redtail Speak** from the list. For more details on how to set up the connector see [SETTING UP REDTAIL SPEAK](#).



CHAPTER 2

Setting Up Redtail Speak

This chapter represents:

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

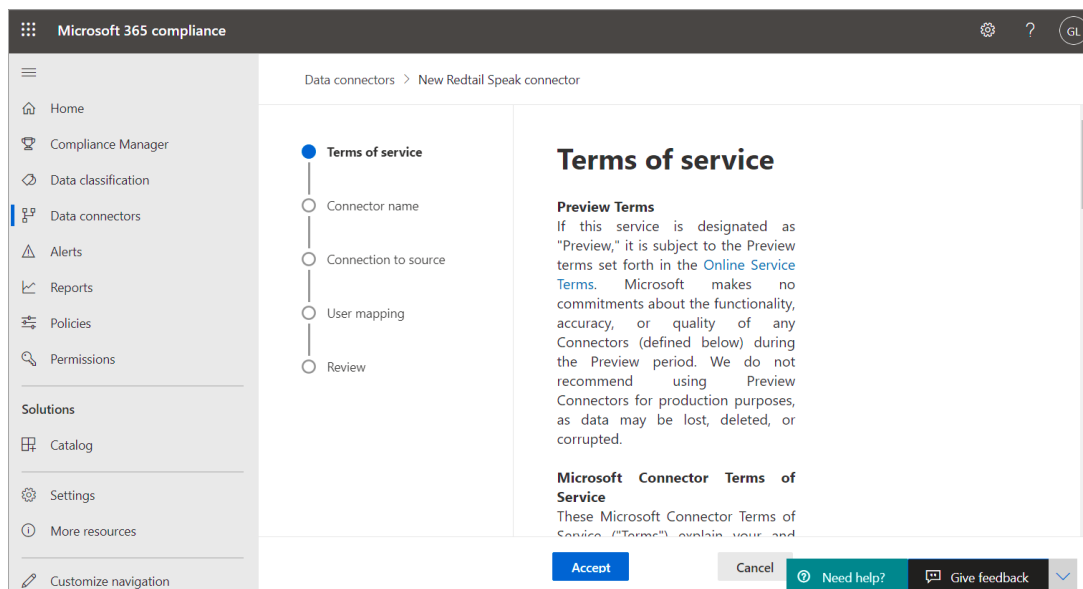
Overview

To set up a new Redtail Speak 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:

The screenshot shows the 'Microsoft 365 compliance' interface. On the left is a navigation pane with links to Home, Compliance Manager, Data classification, Data connectors (selected), Alerts, Reports, Policies, Permissions, Solutions, Catalog, Settings, More resources, and Customize navigation. The main area is titled 'Data connectors > New Redtail Speak connector'. A progress bar on the left indicates the steps: Terms of service (completed), Connector name (current step), Connection to source, User mapping, and Review. The 'Name your connector' section contains instructions: 'See the [step-by-step instructions](#) to help you set up a connector of Redtail Speak. Enter a unique name for this connector.' Below this is a text input field labeled 'Name *' with the placeholder text 'Enter a unique name for this connector'. At the bottom are buttons for Back, Next, Cancel, Need help?, and Give feedback.

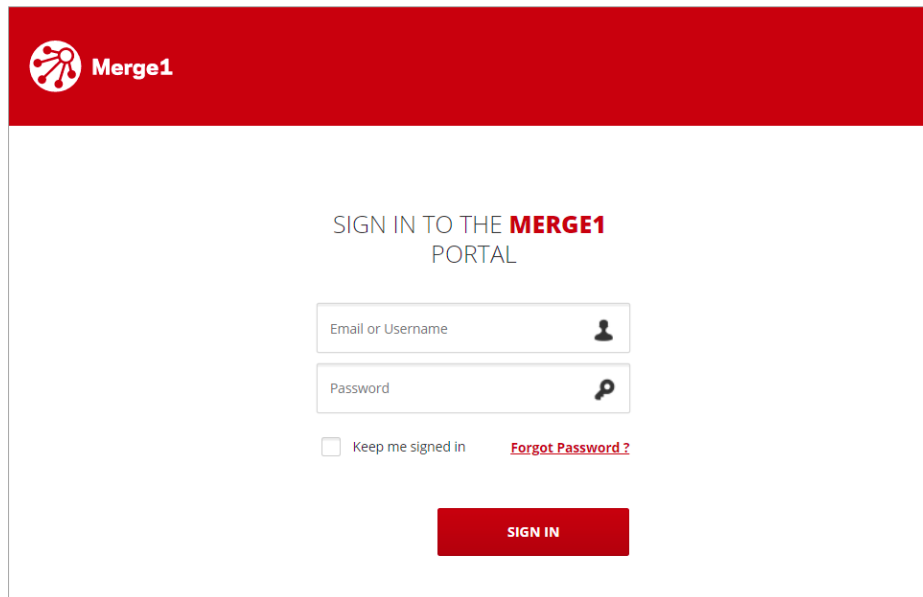
Click **Next**, to be navigated to the **Sign in to your Veritas Technologies account** page.

The screenshot shows the same 'Microsoft 365 compliance' interface, but the progress bar now shows 'Terms of service' and 'Connector name' as completed steps, with 'Connection to source' as the current step. The main area is titled 'Sign in to your Veritas Technologies account'. It contains instructions: 'To connect to your Redtail Speak data, complete the steps in the Veritas Technologies Redtail Speak connection wizard.' Below this is a blue button labeled 'Sign into Veritas Technologies'. Further instructions state: 'When you sign into your Veritas Technologies account, you'll leave the Microsoft 365 compliance center and be directed to a Veritas Technologies site. If your organization doesn't have an account with Veritas Technologies, [sign up](#) for an account or use this'. At the bottom are buttons for Back, Next, Cancel, Need help?, and Give feedback.

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.

The image shows the Merge1 sign-in portal. It features a red header with the Merge1 logo. The main content area is white and contains the text "SIGN IN TO THE MERGE1 PORTAL". Below this text are two input fields: "Email or Username" with a person icon and "Password" with a key icon. There is a checkbox labeled "Keep me signed in" and a link labeled "Forgot Password?". At the bottom is a red "SIGN IN" button.

Redtail Speak 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.

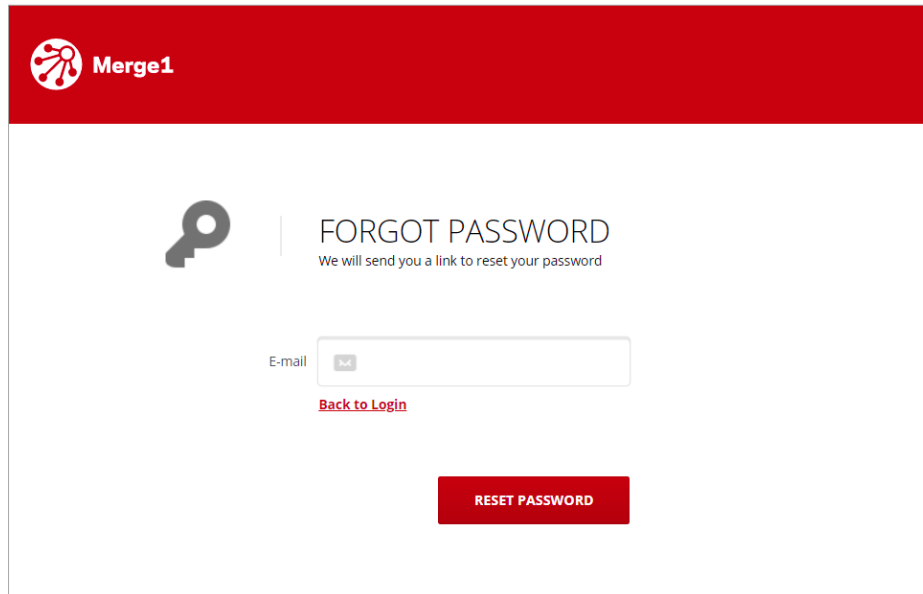
Password Recovery

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:

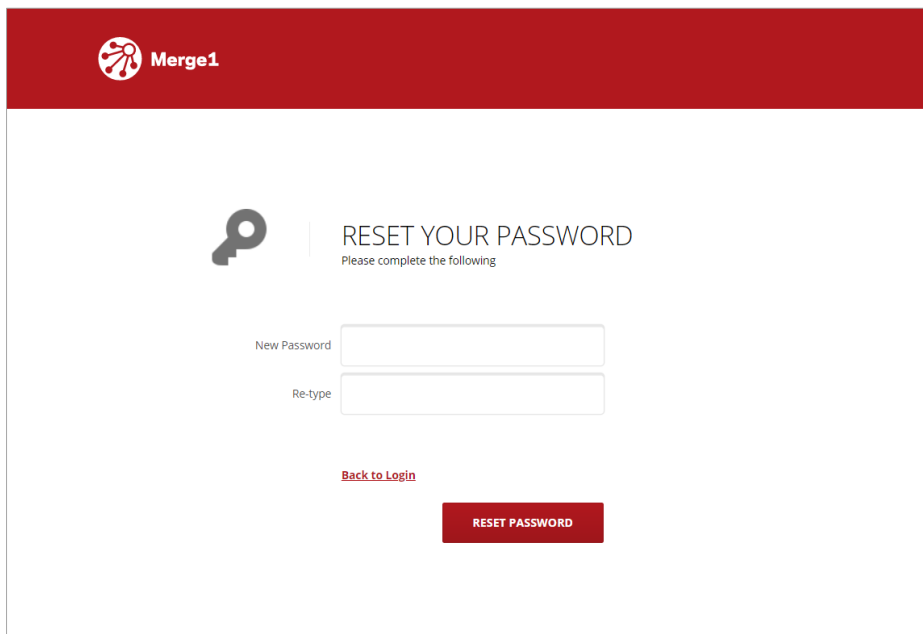
1. Click the **Forgot Password** link in the **Sign in** window.

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



The screenshot shows the Merge1 'FORGOT PASSWORD' screen. At the top is a red header with the Merge1 logo. Below the header, on the left, is a key icon. To the right of the icon, the text 'FORGOT PASSWORD' is displayed, followed by the subtext 'We will send you a link to reset your password'. Below this, there is an 'E-mail' label and a text input field. Under the input field is a red link that says 'Back to Login'. At the bottom center is a red button with the text 'RESET PASSWORD'.

3. Check your email and click the recovery link.
4. Provide a new password and re-enter it for verification.



The screenshot shows the Merge1 'RESET YOUR PASSWORD' screen. At the top is a red header with the Merge1 logo. Below the header, on the left, is a key icon. To the right of the icon, the text 'RESET YOUR PASSWORD' is displayed, followed by the subtext 'Please complete the following'. Below this, there are two text input fields. The first is labeled 'New Password' and the second is labeled 'Re-type'. Below the input fields is a red link that says 'Back to Login'. At the bottom center is a red button with the text 'RESET PASSWORD'.

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

The screenshot shows a web page for 'Veritas Microsoft Connectors Merge1'. The page has a header with the 'VERITAS' logo. Below the header, the text 'Microsoft Connectors' and 'Merge1' is displayed. A paragraph explains that users can use listed Merge1 connectors in the Microsoft 365 compliance center to import and archive chats, attachments, files, and deleted messages. Below this, a section titled 'Connector Types' states that Merge1 extends email archives to support additional content sources like social media, enterprise social, text, IM, financial messaging platforms, files, and custom content. On the right side of the page, there is a registration form with the following fields: 'Email Address *', 'Country *' (a dropdown menu), 'First Name *', 'Last Name *', 'Company *' (with a hint 'To select, begin typing'), and 'Phone Number *' (with a country code dropdown and a pre-filled number '(201) 555-5555'). A red 'Submit form' button is at the bottom of the form. The Microsoft logo is visible at the bottom right of the page.

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 Redtail Speak from the Merge1 product.

Now, when you are redirected to the Veritas Merge1 page, you can start configuring the Redtail Speak connector. For more details on how to configure the connector, see [CONFIGURING THE REDTAIL SPEAK CONNECTOR](#).



CHAPTER 3

Configuring the Redtail Speak Connector

This chapter represents:

- Source
- Targets
- Settings
- User Mapping
- Review

Source Configuration

Redtail Speak SFTP Configuration

To use SSH key authentication method, follow the step below:

The screenshot shows a 'CONFIGURATION WIZARD' window with four tabs: SOURCE, MONITORED USERS, TARGETS, and SETTINGS. The 'SOURCE' tab is active. Below the tabs, a message reads: 'Please provide your Redtail Speak configuration data so that Merge1 can access your Redtail Speak data.' The 'FILE SOURCE' section has a radio button for 'FTP' selected. The 'FTP CONFIGURATION' section includes a checkbox for 'Use SSH Key Authentication' which is checked. Below this, the 'CONNECTION' section has fields for 'Host *' (containing 's-64f964e81bdf4322a.server.'), 'Port *' (containing '22'), and 'Path *' (empty). The 'AUTHENTICATION' section has a 'Username *' field and a 'Public Key *' field. To the right of the 'Username' field is a 'TEST CONNECTION' button. To the right of the 'Public Key' field is a 'GENERATE KEYS' button. At the bottom, there is a section for 'Export/Import Private Key' with 'EXPORT PRIVATE KEY' and 'IMPORT PRIVATE KEY' buttons.

1. Enable **Use SSH Key Authentication** to view the SSH key generator in the **SFTP Configuration Options** window. SSH Key Authentication is used for connecting to Redtail Speak SFTP Server.
2. Make sure the connection settings match those of the SFTP server. Enter the **Path** to the required folder. The default port used for SSH Authentication by Redtail Speak is 22.
3. For **Authentication** enter the username set in your SFTP server.
4. Click **Generate Keys** for **Public Key**.
5. Click **Import Private Key**.

FTP Configurations

Merge1 retrieves data from Redtail Speak FTP and stores it in the **Import Folder** for processing. Corrupt files are moved to the **Quarantine Folder**. The **Download files from FTP** checkbox is enabled to get data from Redtail Speak through FTP.

The screenshot shows a 'CONFIGURATION WIZARD' window with a close button (X) in the top right corner. Below the title bar is a navigation bar with four tabs: 'SOURCE' (highlighted in red), 'MONITORED USERS', 'TARGETS', and 'SETTINGS'. A message below the tabs reads: 'Please provide your Redtail Speak configuration data so that Merge1 can access your Redtail Speak data.'

The 'SOURCE' tab contains a 'FILE SOURCE' section with a radio button for 'FTP' selected. Below this is an 'FTP CONFIGURATION' section with a gear icon and a minus sign. It includes a checkbox for 'Use SSH Key Authentication'. The 'CONNECTION' section has fields for 'Host *', 'Port *' (set to 22), 'Path *', and a 'Connection Type' dropdown menu. Below this is a 'Use Security' checkbox with three radio button options: 'Implicit SSL', 'Explicit SSL' (selected), and 'SSH'. The 'AUTHENTICATION' section has a checked checkbox for 'Anonymous Access', followed by 'Username *' and 'Password *' input fields. A red 'TEST CONNECTION' button is located to the right of the password field.

Part 1

The screenshot shows a configuration window titled "FILE FILTER". It contains several sections: "FILE FILTER" with "Include" (selected) and "Exclude" radio buttons; a text input field; "FILTER BY TIME" with "None" (selected), "Only download files modified within the last: 1 days", and "Only download files modified:" options; "Later than" and "Earlier Than" date pickers; "Server Time Zone" set to "UTC"; "OPTIONS" with "Maintain history of downloaded file for 5 days (0 = infinite)", "Download subdirectories recursively", and "Delete files on server after downloading" checkboxes; and "MISC SETTINGS" with a "Files to import" field containing "*". A red "NEXT" button is at the bottom right.

Part 2

It includes the following:

- 1. Connection** - Enter the hostname of the remote FTP server and the folder path in the **Host** and **Path** text boxes, respectively. The default port is 22. Choose the **AutoActive** connection type from the **Connection Type** drop-down list. The information about the connection type should be provided by the FTP host. If you wish to use FTP over SSL, select **Use Security** check box and choose connection method: **Implicit SSL**, **Explicit SSL** or **SSH**.
- 2. Authentication** - To authenticate an FTP connection, enter the appropriate information in the **Username** and **Password** text boxes, respectively. To enable anonymous FTP connections, select the **AnonymousAccess** check box, which is the default setting.
- 3. File Filter** - Exclude file types. A wildcard can be used to denote the file types to be included or excluded. Each type of filter is separated by the vertical pipe character |. For example: *.tar.gz | *.txt.
- 4. Filter by Time** - Separate the data by time.
 - None** - If this option is selected, the data is not filtered by time.

- **Only download files modified within the last X days** - When this option is selected, only the data modifies within the mentioned days will be downloaded.
- **Only download files modified earlier than/after than** - When this option is selected, only the data modified earlier than or later than the mentioned date will be downloaded. Both options can be selected simultaneously to choose a period.
- **Server Time Zone** - Specifies the time zone in which the FTP server is to correctly determine the timestamp of downloadable files.

5. Options

- **Maintain history of downloaded file for X days (0 = infinitive)** - This sets how many days the history of downloaded files will remain. If the number of days is set to 0, the history is maintained forever.
- **Download subdirectories recursively** - If checked, files from the subdirectories of mentioned path will be downloaded too.
- **Delete files on server after downloading** - If checked, the files downloaded will be deleted from the server.

Miscellaneous Settings

If you want to import specific files or filetypes, note them in the **Files to import** field. You can separate each file or filetype with a vertical bar **|**. Simply write the name of the file (e.g. delimited.txt) or use wildcards to import the whole filetype (ex. *.txt | *.xml).

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

Note that **Monitored Users** tab is not applicable for this connector.

By clicking **Skip**, 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.

The screenshot shows a web interface titled "CONFIGURATION WIZARD" with a close button (X) in the top right corner. Below the title is a navigation bar with four tabs: "SOURCE", "MONITORED USERS", "TARGETS" (which is highlighted in red), and "SETTINGS". Below the tabs, a message reads: "Please provide your M365 Ingestion Service configuration so that Merge1 can deliver your data." The main content area is divided into two sections. The first section contains two input fields: "Target Name *" with the value "M365 Ingestion Target (301)" and "Target Type" with the value "M365 Ingestion Service". The second section is titled "AUTHORIZATION" and contains two input fields: "Tenant ID" and "MS Job ID", both with the value "74a05e7c-a8e5-4546-9f00-16". Below these fields is a red button labeled "TEST CONNECTION". At the bottom of the wizard, there are two buttons: "BACK" and "NEXT" (which is highlighted in red).

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.

CONFIGURATION WIZARD

SOURCE MONITORED USERS TARGETS **SETTINGS**

Please tell us how you want Merge1 to operate

REPORTING & MESSAGE TRACKING

REPORT LEVEL

- ☒ Generate Summary Report Only
- ☐ Generate Per-Source and Summary Report
- ☐ Generate Per-Message, Per-Source and Summary Report

Message Subject Merge1 Importer Report

Recipient Email admin@merge1.com

SEND TEST EMAIL

ALERTING

BACK **SAVE & FINISH**

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.

CONFIGURATION WIZARD

SOURCE MONITORED USERS TARGETS **SETTINGS**

Please tell us how you want Merge1 to operate

REPORTING & MESSAGE TRACKING

ALERTING

☒ **ENABLE ALERTING**

ALERTING LEVEL

☒ Error
☐ Warning

Buffer Size

Recipient Email **SEND TEST EMAIL**

BACK **SAVE & FINISH**

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.

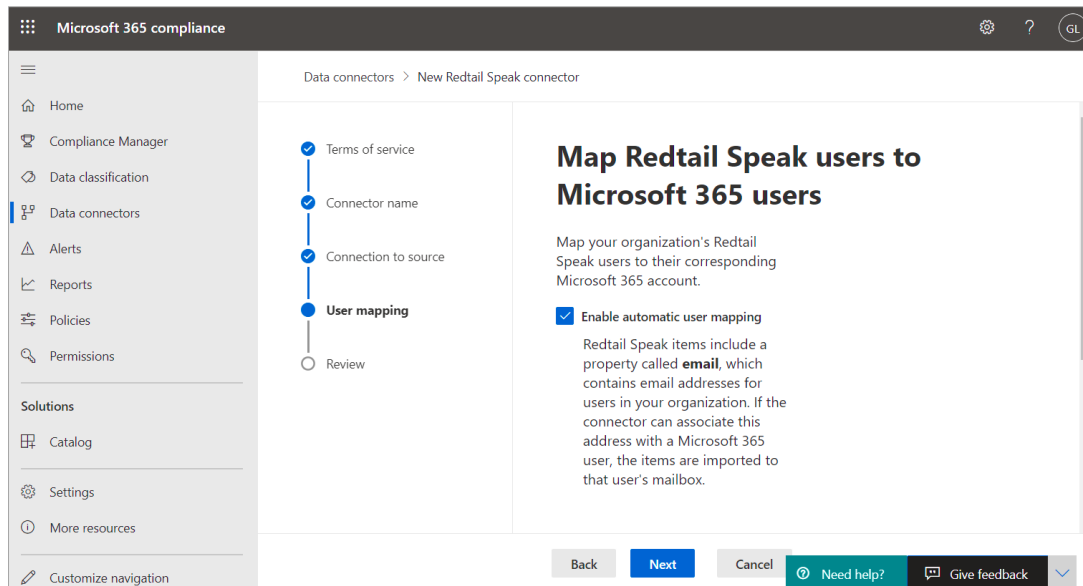
To configure the alerting, specify the **Buffer Size**.

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

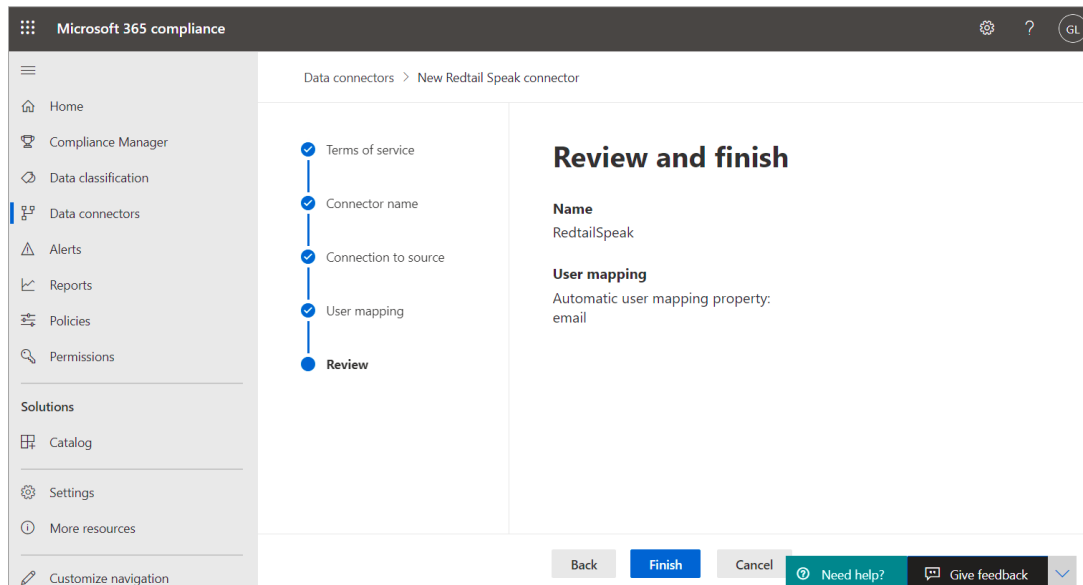
Provide the required user mapping.



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!

