

VERITAS™

Third-Party Connectors

Reuters Dealing

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

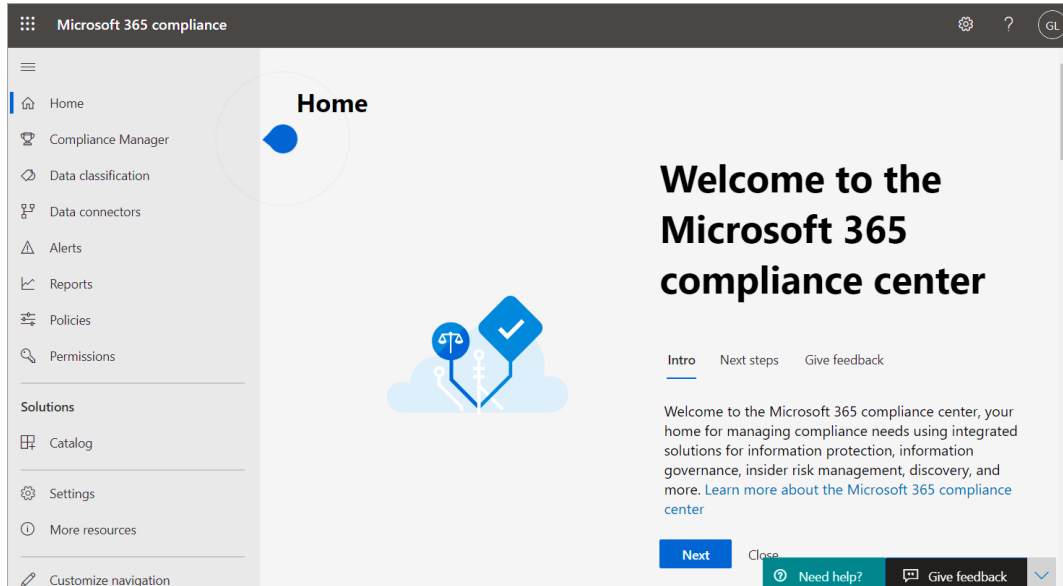
Many of the implementation steps, required to archive Reuters Dealing data are external to Microsoft 365 and must be completed before you can create the connector in the compliance center.

- Create a Merge1 account by accepting their terms and conditions for Reuters Dealing 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 Reuters Dealing 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”.

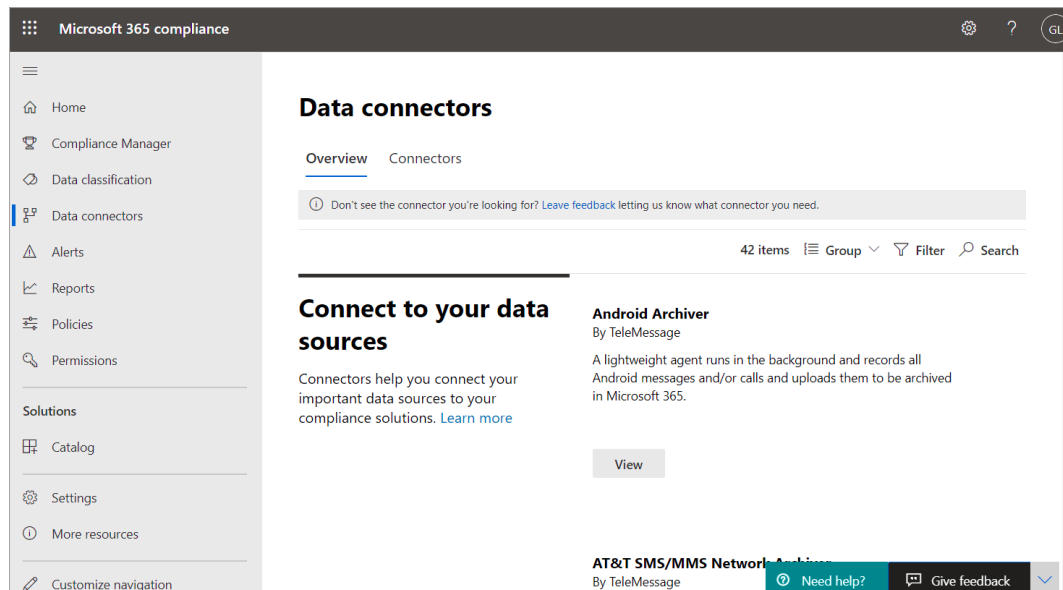
Accessing the Data Connectors

To access the Data Connectors, follow the steps below:

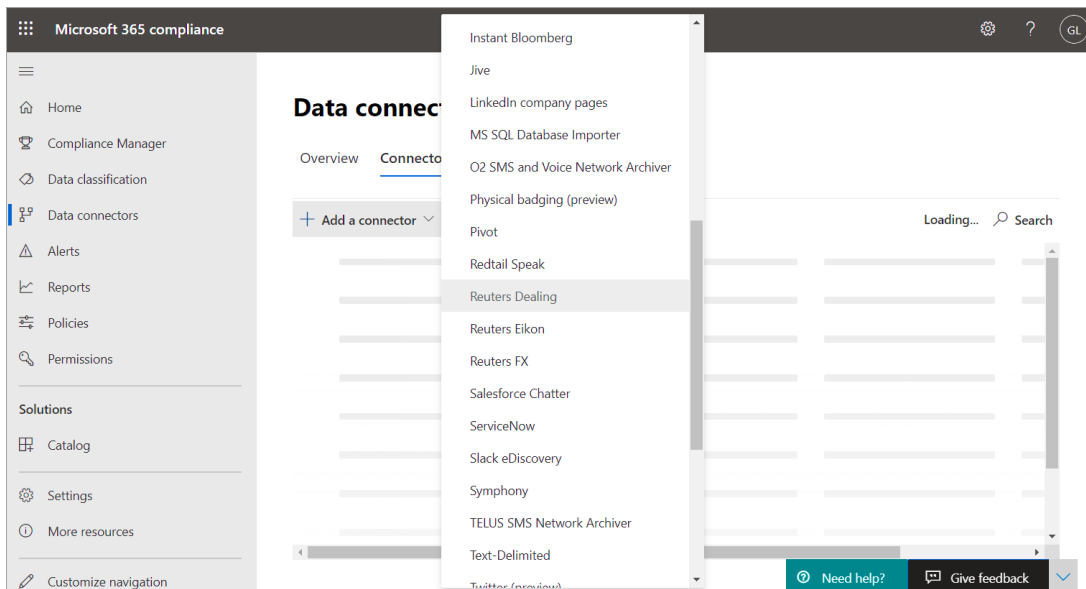
1. Go to <https://compliance.microsoft.com> web page.



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 **Reuters Dealing** from the list. For more details on how to set up the connector see [SETTING UP REUTERS DEALING](#).



CHAPTER 2

Setting Up Reuters Dealing

This chapter represents:

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

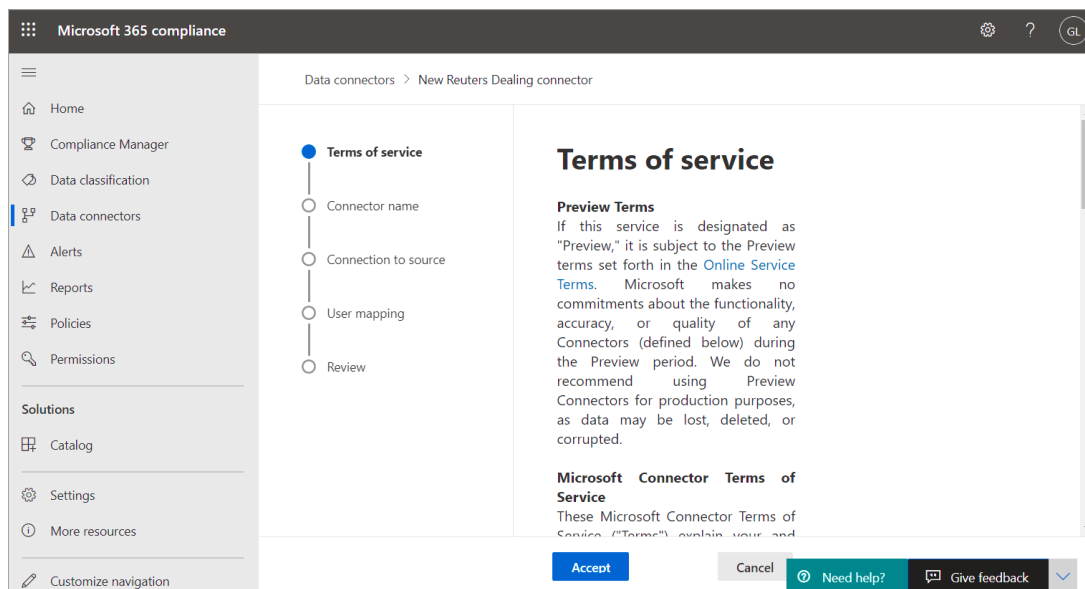
Overview

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

- Terms of service
- Connector name
- Connection to source
- User mapping
- Review.

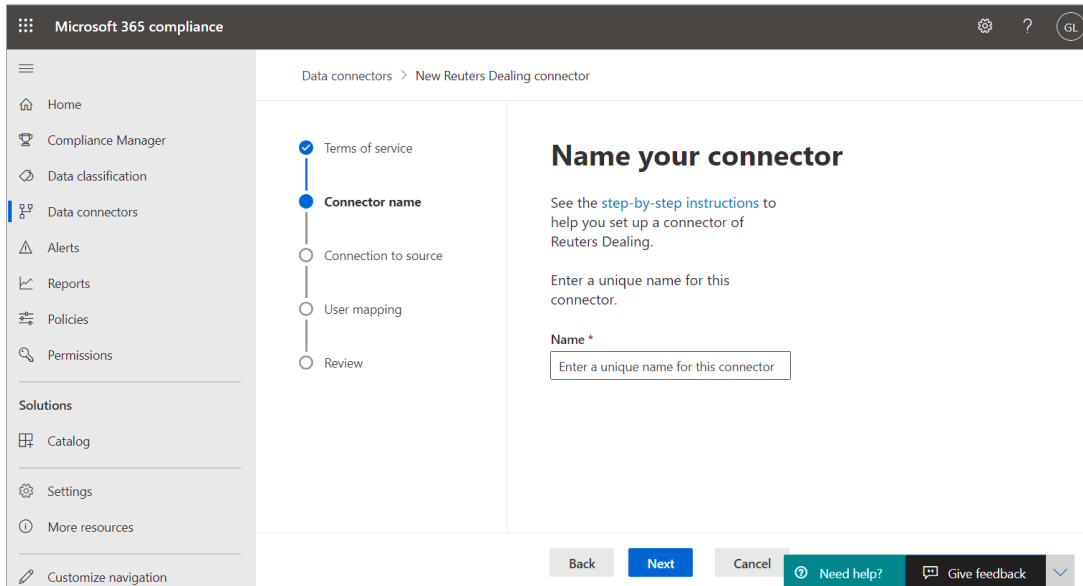
Terms of Service

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

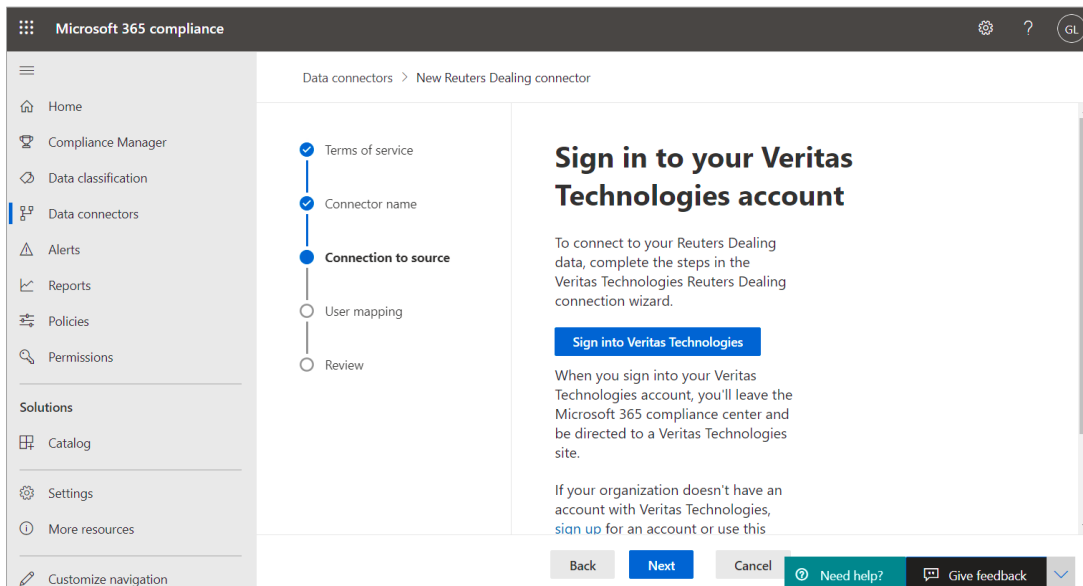


Connector Name

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



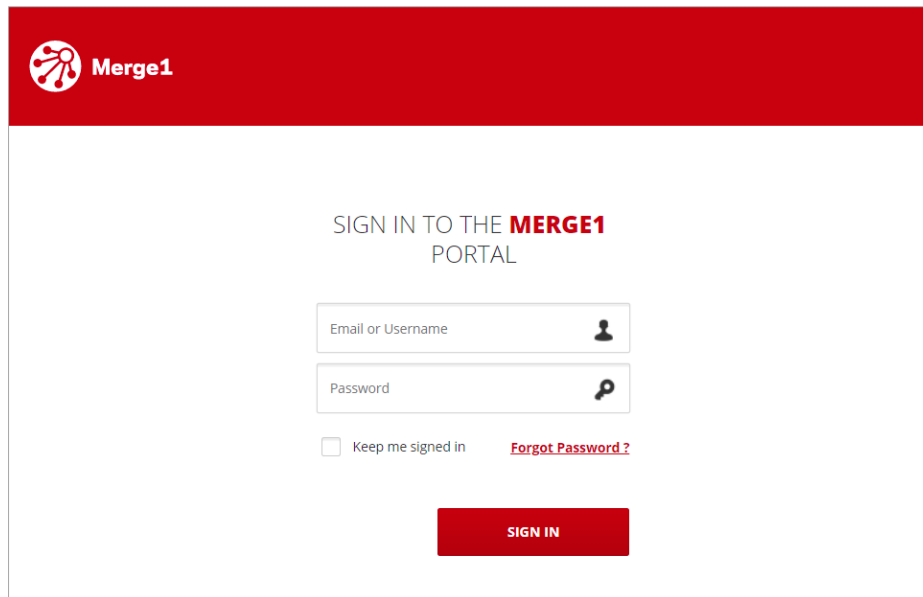
Click **Next**, to be navigated to the **Sign in to your Veritas Technologies account** page.



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.



The screenshot shows the Merge1 login interface. At the top left is the Merge1 logo. The main heading is "SIGN IN TO THE MERGE1 PORTAL". Below the heading are two input fields: "Email or Username" with a user icon and "Password" with a key icon. Underneath the password field is a checkbox labeled "Keep me signed in" and a red link "Forgot Password?". At the bottom center is a red button labeled "SIGN IN".

Reuters Dealing 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.

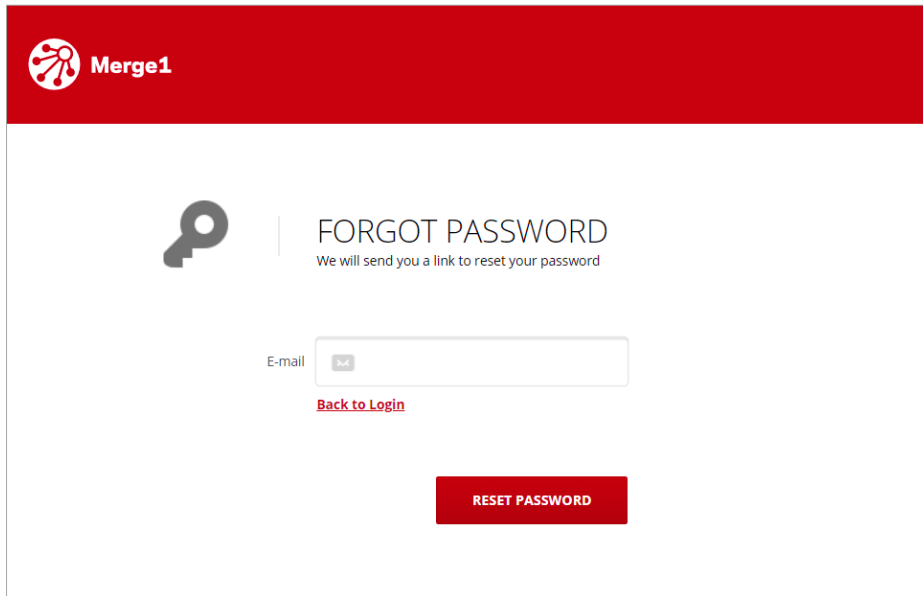
Password Recovery

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:

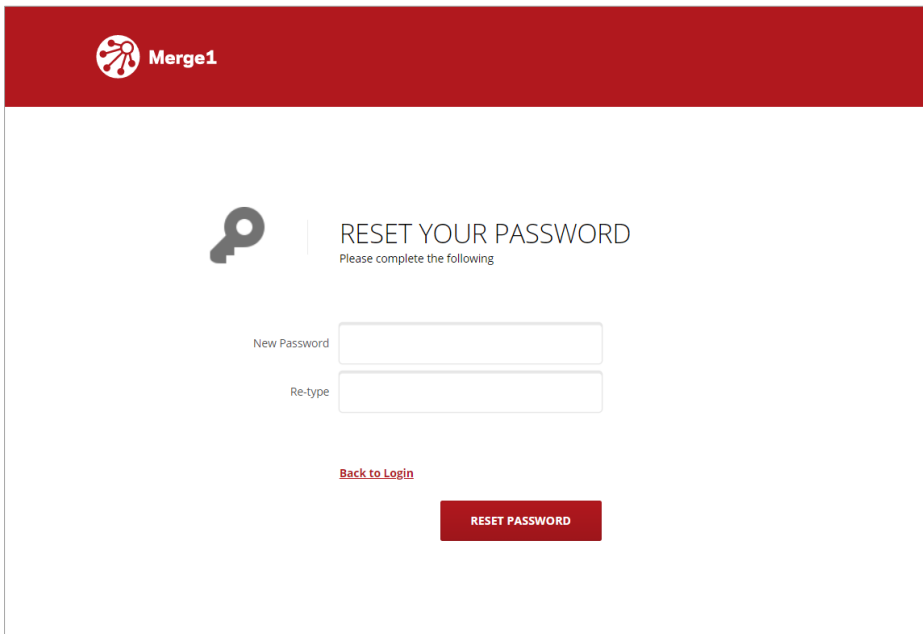
1. Click the **Forgot Password** link in the **Sign in** window.

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' page. At the top left is the Merge1 logo. The main heading is 'FORGOT PASSWORD' with the subtext 'We will send you a link to reset your password'. Below this is an 'E-mail' input field with a small envelope icon. Underneath the input field is a red link that says 'Back to Login'. At the bottom center is a red button labeled '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' page. At the top left is the Merge1 logo. The main heading is 'RESET YOUR PASSWORD' with the subtext 'Please complete the following'. Below this are two input fields: 'New Password' and 'Re-type'. Underneath the input fields is a red link that says 'Back to Login'. At the bottom center is a red button labeled '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 registration form titled "Microsoft Connectors Merge1" with the Veritas logo at the top left. The form includes a "Required Field" label and a prompt: "Please fill out this form to be contacted promptly." The form fields are: Email Address*, Country*, a dropdown menu for "Please Select", First Name*, Last Name*, Company*, a text field for "To select, begin typing", and Phone Number* with a country code dropdown set to "(201) 555-5555". A red "Submit form" button is at the bottom of the form. The Microsoft logo is at the bottom right of the form area. Below the form, there is a section titled "Connector Types" with a brief description: "Merge1 extends your email archive to support additional content sources, including social media, enterprise social, text, IM, financial messaging platforms, files and custom content."

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 Reuters Dealing from the Merge1 product.
- Now, when you are redirected to the Veritas Merge1 page, you can start configuring the Reuters Dealing connector. For more details on how to configure the connector, see [CONFIGURING THE REUTERS DEALING CONNECTOR](#).



CHAPTER 3

Configuring the Reuters Dealing Connector

This chapter represents:

- Source
- Targets
- Settings
- User Mapping
- Review

Source

FTP Configurations

Merge1 retrieves data from Reuters Dealing 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 Reuters Dealing through FTP.

The screenshot shows a 'CONFIGURATION WIZARD' window with a close button (X) in the top right corner. The window has four tabs: 'SOURCE' (highlighted in red), 'MONITORED USERS', 'TARGETS', and 'SETTINGS'. Below the tabs, a message reads: 'Please provide your Reuters configuration data so that Merge1 can access your Reuters data.' The main content area is titled 'FILE SOURCE' and has a radio button selected for 'FTP'. Below this is a 'FTP CONFIGURATION' section with a gear icon and a minus sign. The 'CONNECTION' section includes: 'Host *' (text input), 'Port *' (input with '22'), 'Path *' (text input), and 'Connection Type' (dropdown menu). The 'Use Security' section has a checkbox and three radio buttons: 'Implicit SSL', 'Explicit SSL' (selected), and 'SSH'. The 'AUTHENTICATION' section has a checked checkbox for 'Anonymous Access', 'Username *' (text input), and 'Password *' (text input). A red 'TEST CONNECTION' button is located at the bottom right of the configuration area.

Part 1

The screenshot displays the configuration interface for the Reuters Dealing Connector. It is divided into several sections:

- FILE FILTER:** Includes radio buttons for 'Include' (selected) and 'Exclude'. Below is an empty text input field.
- FILTER BY TIME:** Includes radio buttons for 'None' (selected), 'Only download files modified within the last: 7 days', and 'Only download files modified:'. Under the last option, there are checkboxes for 'Later than' and 'Earlier Than', each with a date picker icon. Below this is a 'Server Time Zone' dropdown menu set to 'UTC'.
- OPTIONS:** Includes a text input for 'Maintain history of downloaded file for 5 days (0 = infinite)'. Below are checkboxes for 'Download subdirectories recursively' and 'Delete files on server after downloading'.
- MISC SETTINGS:** Includes a text input for 'Files to import: e.g.: *.txt|*.xml (separated by vertical bars)*' with the value '*.*' entered.

A red 'NEXT' button is located at the bottom right of the configuration area.

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/later 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 = infinite)** - 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.

CONFIGURATION WIZARD

SOURCE MONITORED USERS **TARGETS** SETTINGS

Please provide your M365 Ingestion Service configuration so that Merge1 can deliver your data.

Target Name * M365 Ingestion Target (301) Target Type M365 Ingestion Service

AUTHORIZATION

Tenant ID 74a05e7c-a8e5-4546-9f00-16

MS Job ID 74a05e7c-a8e5-4546-9f00-16

TEST CONNECTION

BACK **NEXT**

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.

The screenshot shows a 'CONFIGURATION WIZARD' window with a close button (X) in the top right corner. Below the title bar are four tabs: 'SOURCE', 'MONITORED USERS', 'TARGETS', and 'SETTINGS' (which is highlighted in red). Below the tabs is the instruction 'Please tell us how you want Merge1 to operate'. The main content area is titled 'REPORTING & MESSAGE TRACKING' and contains a 'REPORT LEVEL' section with three radio button options: 'Generate Summary Report Only' (selected), 'Generate Per-Source and Summary Report', and 'Generate Per-Message, Per-Source and Summary Report'. Below this is a 'Message Subject' field with the value 'Merge1 Importer Report' and a 'Recipient Email' field with the value 'admin@merge1.com'. A red 'SEND TEST EMAIL' button is positioned to the right of the email field. At the bottom of the wizard, there is an 'ALERTING' section with a plus sign icon, and a 'BACK' button and a red 'SAVE & FINISH' button.

- 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.

The screenshot shows a 'CONFIGURATION WIZARD' window with a close button (X) in the top right corner. Below the title bar are four tabs: 'SOURCE', 'MONITORED USERS', 'TARGETS', and 'SETTINGS' (which is highlighted in red). Below the tabs is the instruction 'Please tell us how you want Merge1 to operate'. There are two expandable sections: 'REPORTING & MESSAGE TRACKING' (expanded) and 'ALERTING' (collapsed). The 'ALERTING' section is expanded, showing a red bar with a checkmark and the text 'ENABLE ALERTING'. Below this, under 'ALERTING LEVEL', there are two radio buttons: 'Error' (selected) and 'Warning'. A 'Buffer Size' input field contains the value '200'. At the bottom of the section, there is a 'Recipient Email' input field with the value 'admin@merge1.com' and a red 'SEND TEST EMAIL' button. At the bottom of the wizard, there are two buttons: 'BACK' and 'SAVE & FINISH' (highlighted in red).

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.

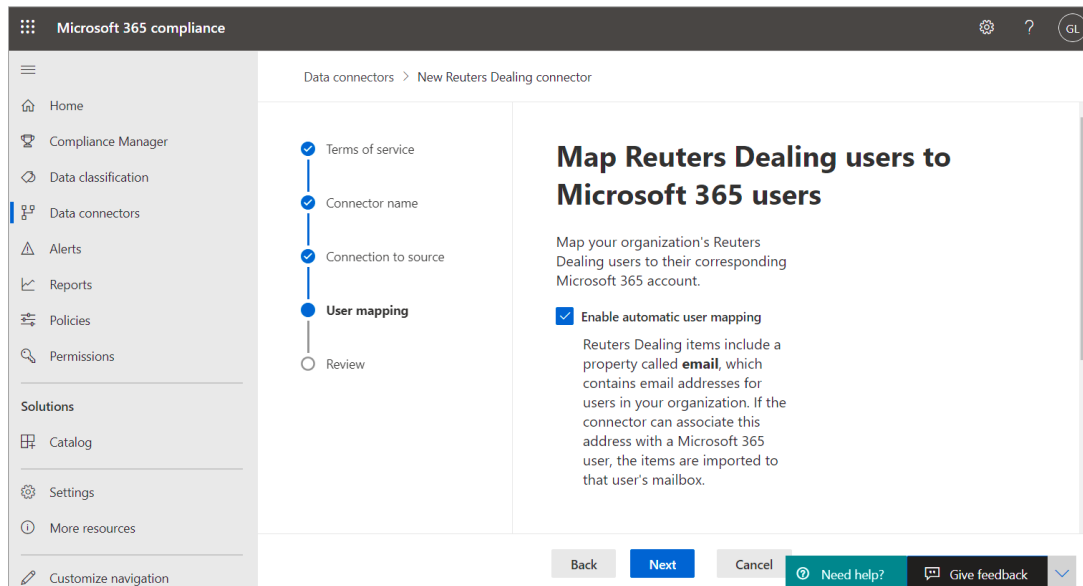
To configure the alerting, specify the **Buffer Size**.

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

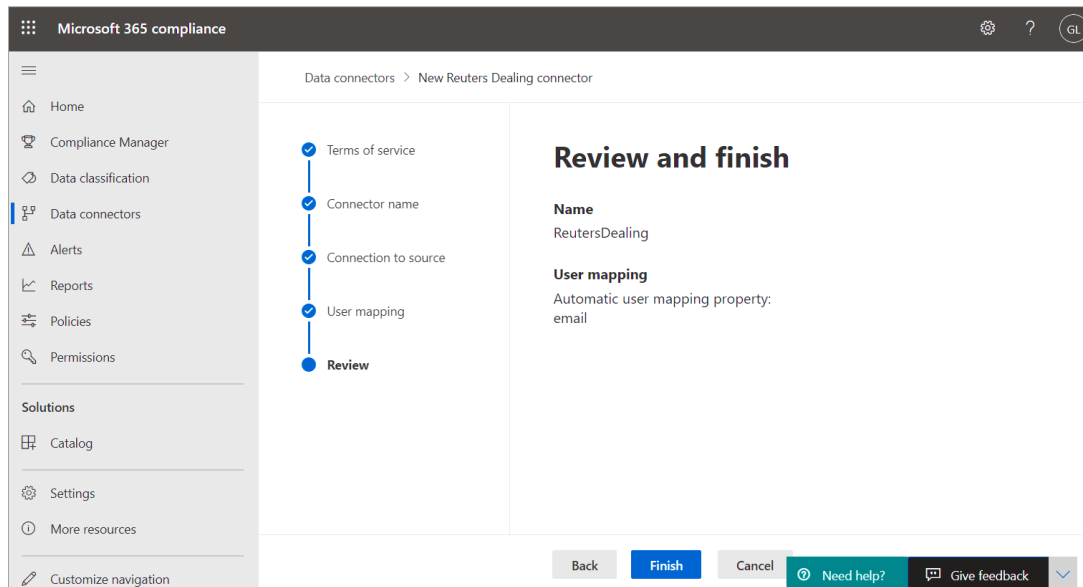
Provide the required user mapping.



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!

