

VERITAS™

Third-Party Connectors

RingCentral

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

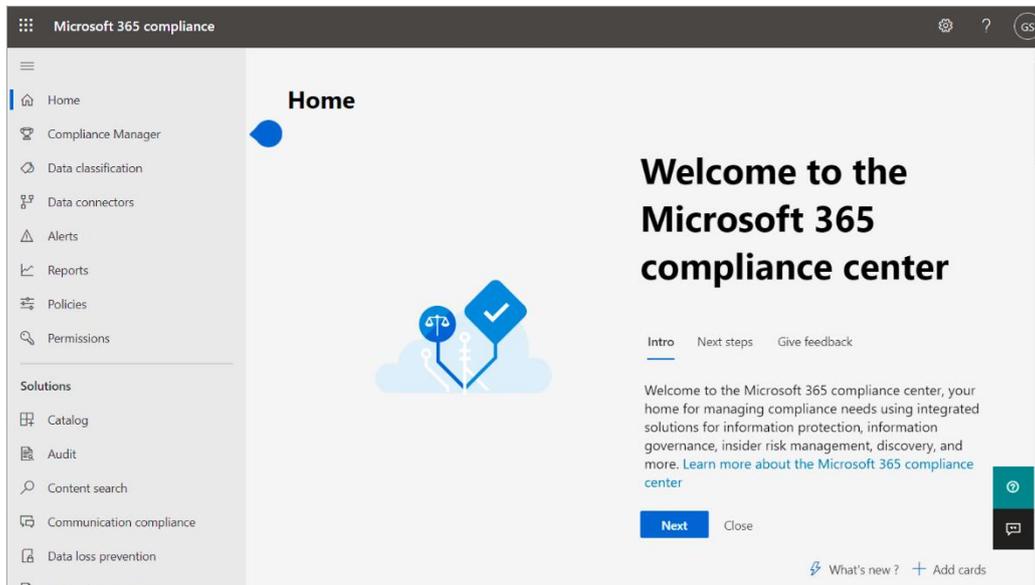
Many of the implementation steps, required to archive RingCentral data are external to Microsoft 365 and must be completed before you can create the connector in the compliance center.

- Create a Merge1 account by accepting their terms and conditions for RingCentral connector. Here you will need to contact [Veritas Customer Support](#). You will sign into this account when you create the connector.
- Create a RingCentral application to fetch data from your RingCentral account. For step-by-step instructions on how to create the application, see [Creating a RingCentral Application](#).
- The user, who creates the RingCentral 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”.

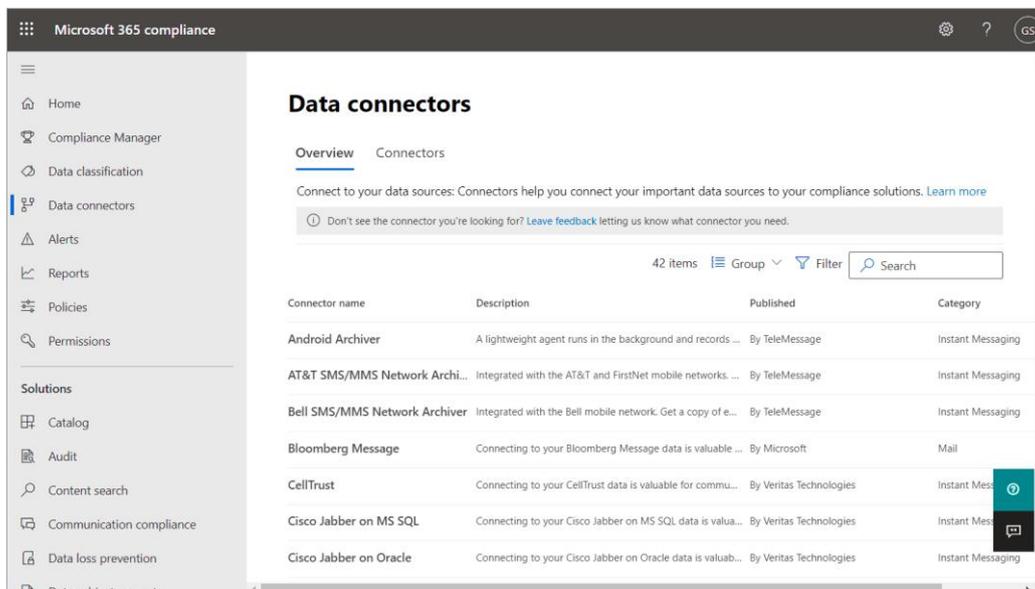
Accessing the Data Connectors

To access the Data Connectors, follow the steps below:

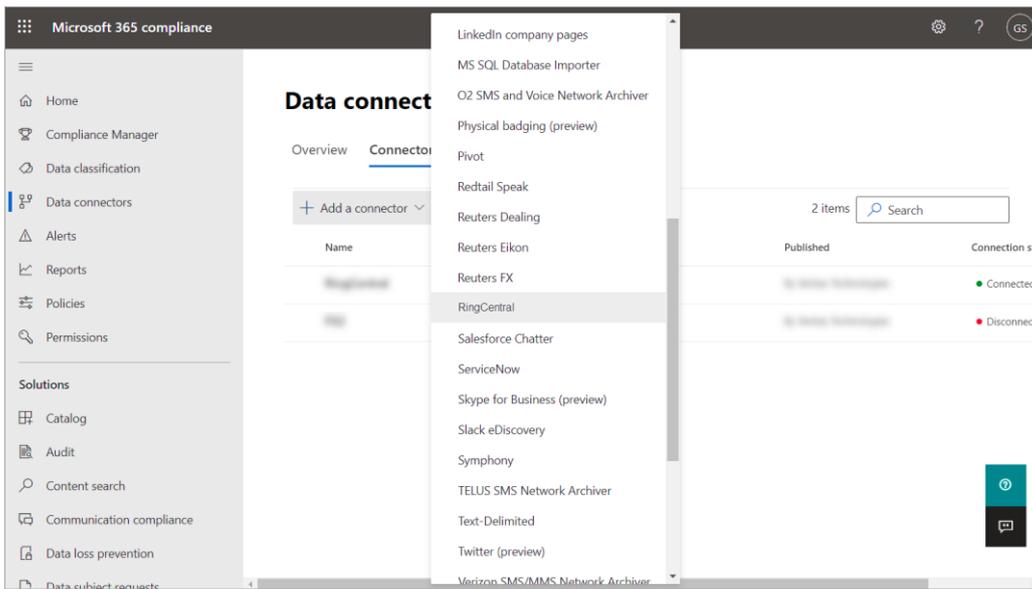
1. Go to <https://compliance.microsoft.com> web page.



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 **RingCentral** from the list. For more details on how to set up the connector see [SETTING UP RINGCENTRAL](#).



CHAPTER 2

Setting Up RingCentral

This chapter represents:

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

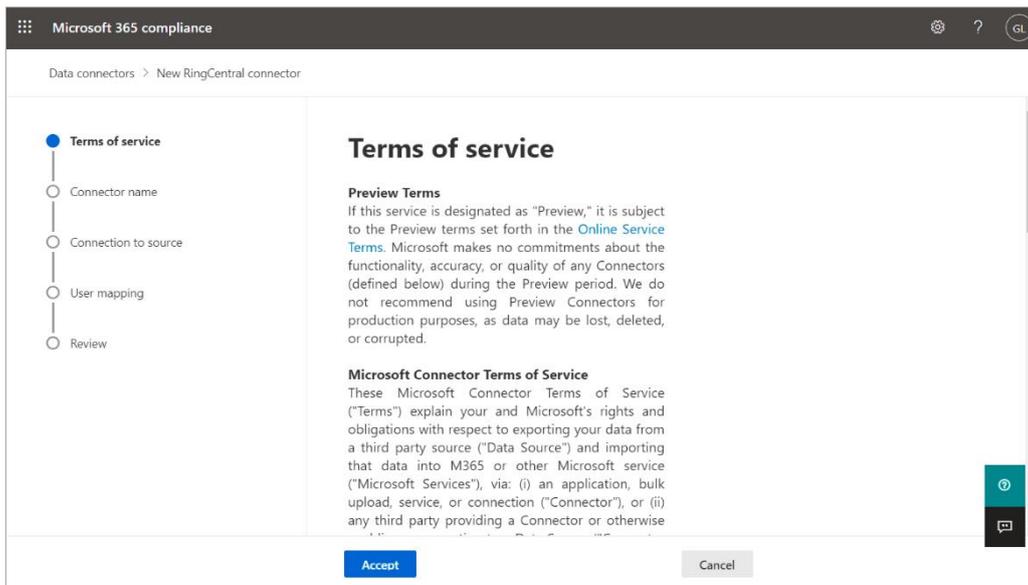
Overview

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

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

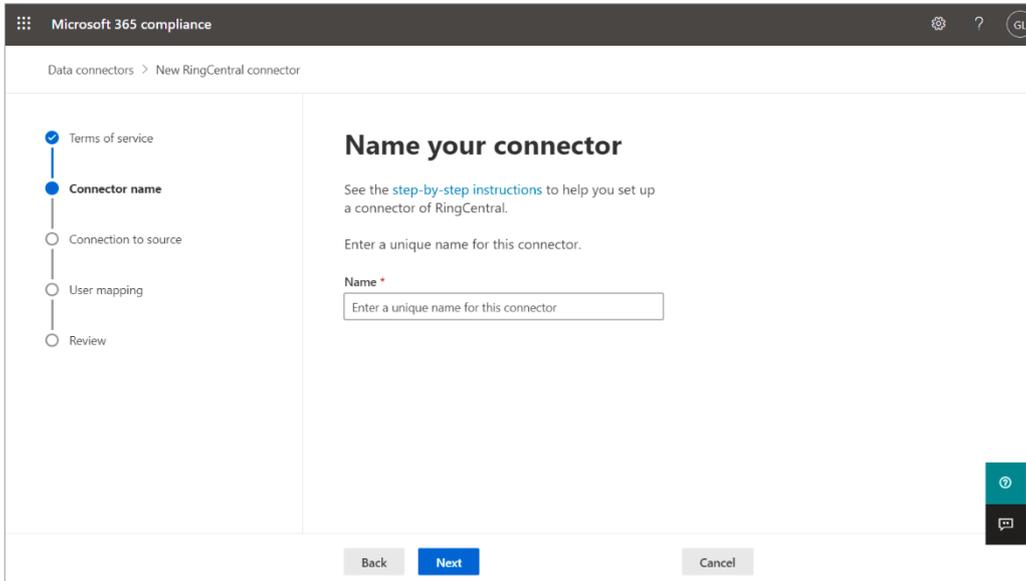
Terms of Service

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

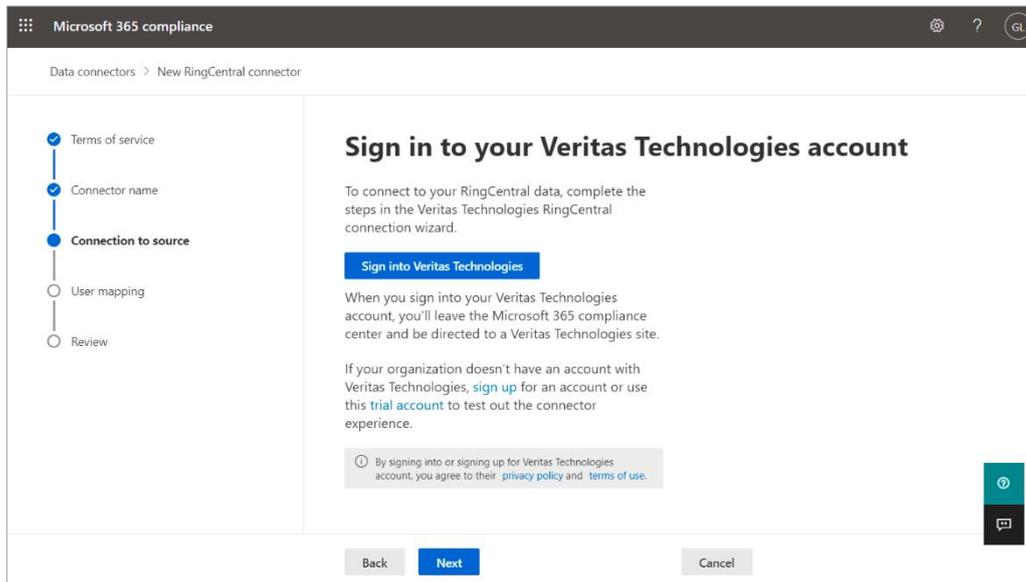


Connector Name

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



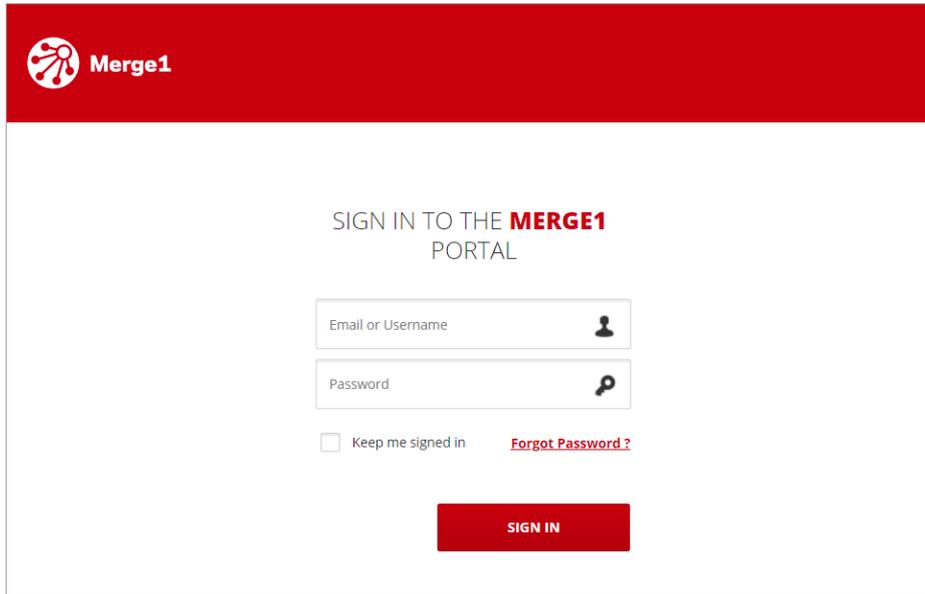
Click **Next**, to be navigated to the **Sign in to your Veritas Technologies account** page.



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 person icon and "Password" with a key icon. Below the input fields is a checkbox labeled "Keep me signed in" and a red link labeled "Forgot Password?". At the bottom center is a red button labeled "SIGN IN".

RingCentral 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.

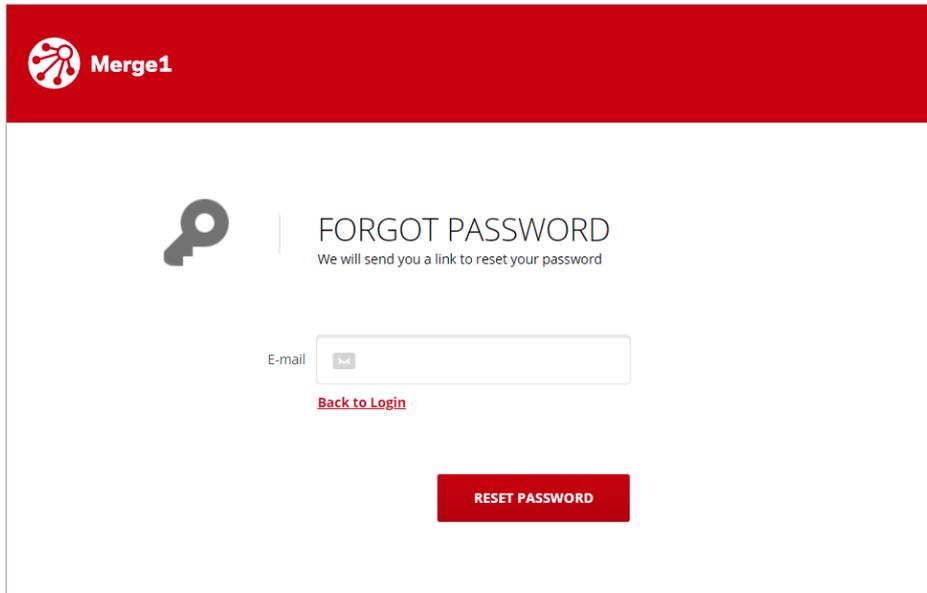
Password Recovery

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.



Merge1

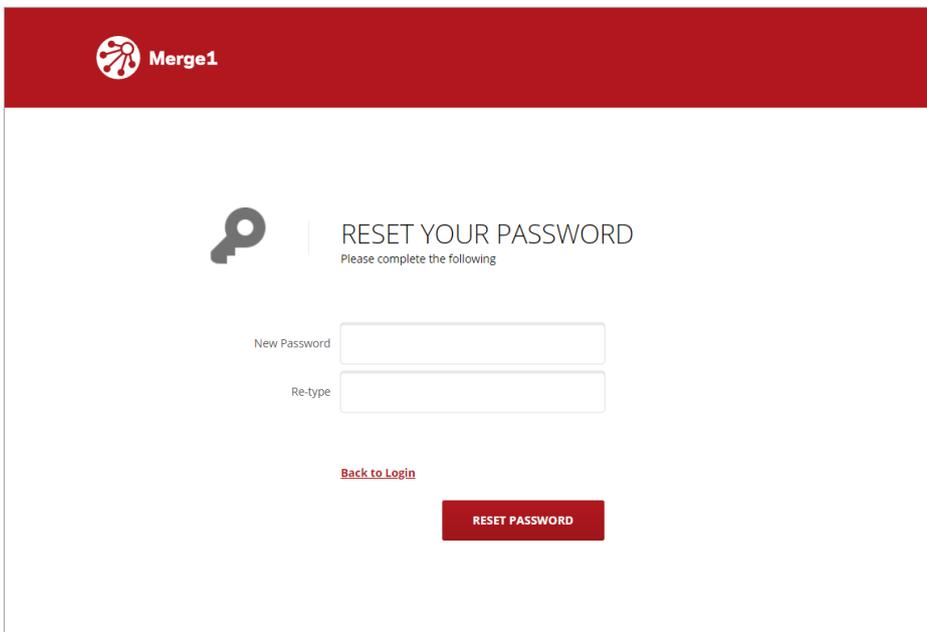
 **FORGOT PASSWORD**
We will send you a link to reset your password

E-mail

[Back to Login](#)

RESET PASSWORD

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



Merge1

 **RESET YOUR PASSWORD**
Please complete the following

New Password

Re-type

[Back to Login](#)

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 "Submit form" button and a Microsoft logo at the bottom right. The form fields are: Email Address*, Country*, First Name*, Last Name*, Company*, and Phone Number*. A red asterisk indicates that all fields are required. A note above the form says "Please fill out this form to be contacted promptly." Below the form, there is a section titled "Connector Types" with a 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." The form also includes a small text block: "Use any of our listed Merge1 connectors in the Microsoft 365 compliance center to import and archive chats, attachments, files, and deleted messages. After you set up and configure a connector, it connects to your organization's Merge1 account and imports those communications for the connector(s) of your choice for eDiscovery, archiving and compliance peace of mind."

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 RingCentral from the Merge1 product.

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



CHAPTER 3

Configuring the RingCentral Connector

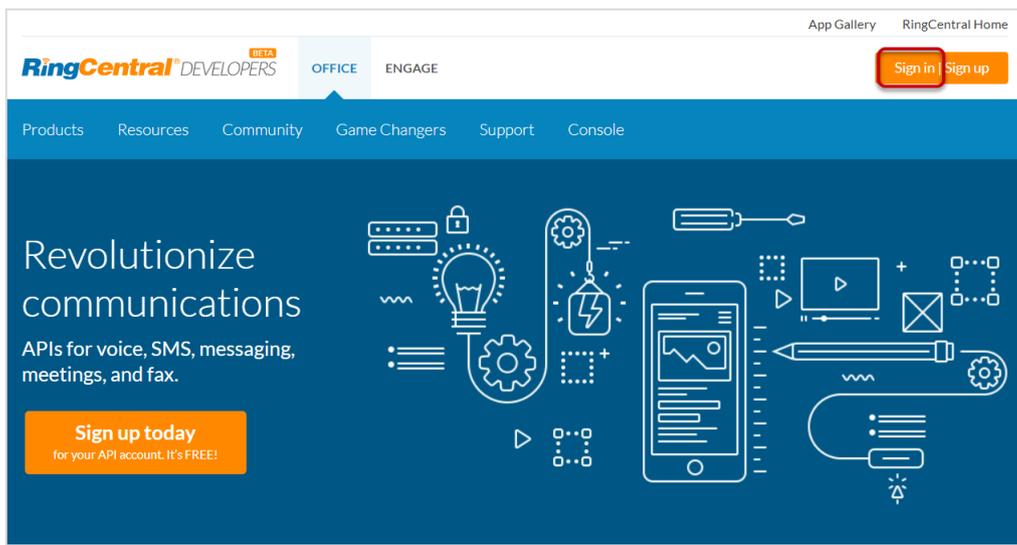
This chapter represents:

- Creating the RingCentral Application
- Source
- Targets
- Settings
- User Mapping
- Review

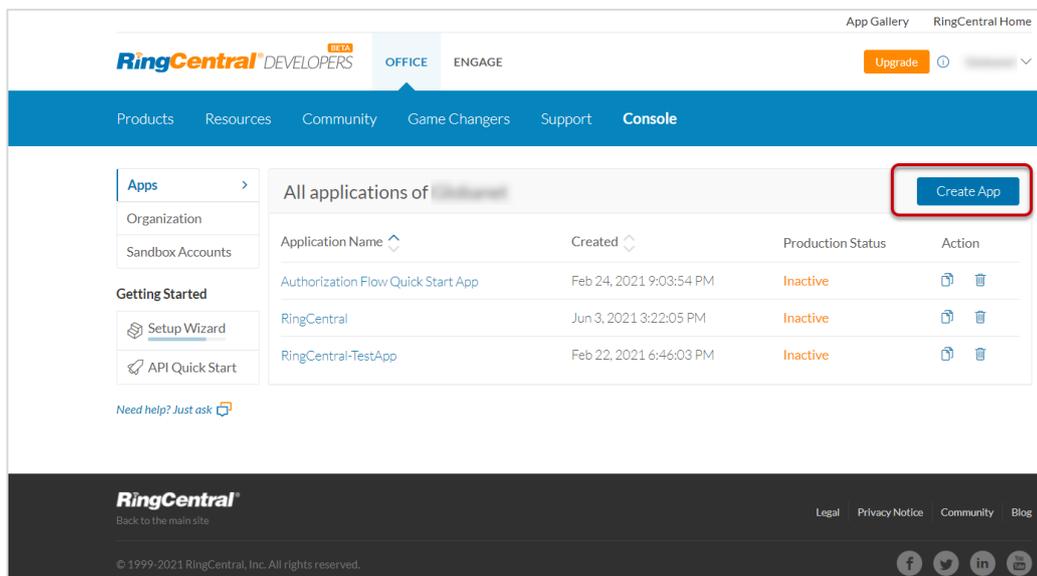
Creating a RingCentral Application

To create the application:

1. Sign in to the [RingCentral Developer Console](#).



2. You will be navigated to the **Apps** console where all your apps are listed and can be managed. Click **Create App** at the upper right corner of **All applications**.



Note that if you see the **Create App** button, but it is disabled, then your account lacks the permission required to create an app. Contact your account administrator to request this permission.

3. Select your app type and click **Next**.

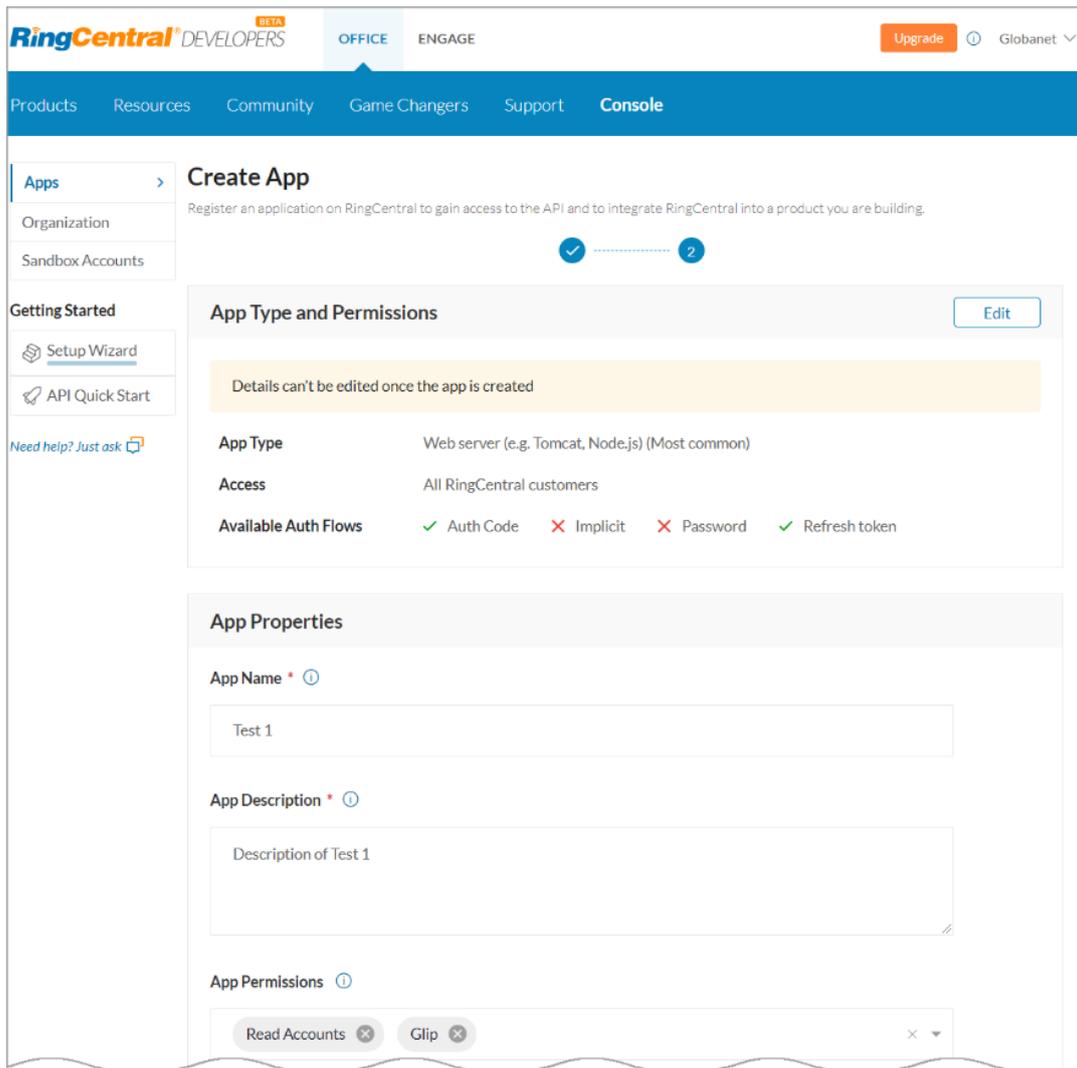
The screenshot shows the RingCentral Developer Console interface for creating a new app. The main heading is "Create App" with a sub-heading "Register an application on RingCentral to gain access to the API and to integrate RingCentral into a product you are building." The page is divided into several sections:

- App Type and Permissions:** This section contains a warning box stating "Details can't be edited once the app is created". Below this, there are two main app types to choose from:
 - API App for RingCentral Office:** This option is selected. It includes a section "Where will you be calling the API from?" with radio buttons for "Web server (e.g. Tomcat, Node.js) (Most common)", "Web browser (Javascript)", "Android", "iOS", "Windows Desktop", "Mac Desktop", and "Other Non-UI (e.g. cronjob, daemon, command line)".
 - Bot App for Team Messaging:** This option is not selected.
- Available Auth Flows:** This section lists the authentication flows that are available for the selected app type. The flows are: "Auth Code" (checked), "Implicit" (unchecked), "Password" (unchecked), and "Refresh token" (checked). There is a "Help me choose" link below this section.
- Who will be authorized to access your app?:** This section contains three dropdown menus for selecting the scope of access. The first dropdown is set to "All RingCentral customers".
- Do you intend to promote your app in our App Gallery? (for internal use only):** This section has two buttons: "Yes" and "No".

At the bottom right of the form, there are two buttons: "Cancel" and "Next".

4. In the next opened window, enter **App Name** and **Description**.

5. Enter **App Name** and **Description**.



Part 1

6. Select **Read Accounts** and **Glip** from the **App Permissions** drop-down list and enter the URL of your local Merge1 environment in the **OAuth Redirect URI** field with the following extension: `https://< instance>/Configuration/OAuthCallback1`.

¹ You can find it in the 5th point of the click information.

OAuth Redirect URI ⓘ

For example, <https://mycompany.com> (optional) +

Display Preferences

Display Name ⓘ

RingCentral

App Icon ⓘ

Image must be a square
File format supported: jpg, png, svg or gif
Size: less than 100KB

Choose

Application Contacts

Primary Contact * ⓘ

XXXXXXXXXX XXXXXXXXXX.com × ▾

Back Create

Part 2

7. Click **Create**.

In the opened window you will find your application details, including **Client ID**, **Client Secret**, and **RingCentral Server URL**.

Apps > TestApp

Dashboard >

- Settings
- Credentials
- Status & Review
- App Gallery
- Rate Limits
- Analytics

Need help? Just ask

Production Status: **Inactive** | Active In Sandbox | ⓘ View Full Status ⓘ

Progress: Create App (✓) — Develop App (●) — Apply for Production ⓘ — In Production (●)

! Develop and test your app against the sandbox environment and account. Please retrieve your sandbox credentials here.

When your app has met all the [graduation requirements](#), you will be able to apply for production.

Apply for Production

Sandbox Credentials View All Credentials ⓘ

API Server URL <https://platform.devtest.ringcentral.com>

Client ID XXXXXXXXXX ▾

Client Secret XXXXXXXXXX

Account XXXXXXXXXX ▾

Online Portal [Online Portal](#)

Password Active | [Reset password](#)

Configuring the RingCentral Connector

Source Configuration

For configuring the RingCentral connector:

1. In the **Application ID** field enter **Client ID** copied previously, in **Application secret/key**, enter the copied **Client Secret**, enter the API server URL in the RingCentral server URL field, and then click **Next**.

The screenshot shows a 'CONFIGURATION WIZARD' dialog box with a close button (X) in the top right corner. The 'SOURCE' tab is selected, with other tabs being 'MONITORED USERS', 'FILTERS', 'TARGETS', and 'SETTINGS'. Below the tabs, there is instructional text: 'Please provide the following credentials to your company's RingCentral app so that Merge1 can be configured to access your monitored users' account data.' and a link: 'If you do not have an app created for RingCentral, please [click](#) for more information.' The main section is titled 'RINGCENTRAL APPLICATION CONFIGURATION' and contains three input fields: 'Application ID', 'Application secret/key', and 'RingCentral server URL'. Below these fields is a checkbox labeled 'I have access token'. At the bottom of the dialog, there are 'BACK' and 'NEXT' buttons.

Timestamp Formatting

In addition to the primary stamp, a second timestamp can be enabled with its time zone. From the drop-down list you can choose the time zone of the timestamp. The format of the timestamp in the output message can also be specified from the six options in the Datetime Format dropdown list.

The screenshot shows a 'TIME STAMP FORMATTING' configuration panel. It has three main sections: 'Primary time zone' with a dropdown menu showing '(UTC+04:00) Port Louis (MST)'; 'Secondary time zone' with an unchecked checkbox and an empty dropdown menu; and 'Date time format' with a dropdown menu showing 'Mar 29, 2019 21:31:11'.

Attachment Configurations

There are the following options when configuring the attachments:

- When the **Ignore Attachments** checkbox is checked, all the attachments are being excluded from the message which will enhance the connector performance. Each message will contain only information and the link of the excluded attachment.
- When **Do not download files greater than X megabyte(s)** is selected, the files, that are bigger than the specified number of megabytes, are not downloaded. In the **Custom Message** field, a text for those excluded file sizes can be specified. For example: “Files {0} are not imported, because they are greater than {1} megabytes”. {0} is used to add the name of the file and {1} is used to add the number of megabytes specified above.
- In the **File Types** field, the types of files that should not be downloaded can be specified in the following format: e.g., *.txt | *.xml. In the **Custom Message** field, a text for those excluded file types can be specified. The vertical bar is used to separate the file types.
- Specify **Do Not Download Data Modified Before** and **Do Not Download Data Modified After** to allow cutting off data outside the set date range. If the **before** date is set to 04/17/2019 and the **after** is set to 03/25/2021 only the data between these two dates will be downloaded. Data outside that timeframe will be ignored. Note that both options can be used independently as well.

The screenshot displays the 'ATTACHMENTS CONFIGURATION' interface with the following elements:

- Ignore attachments:** A checkbox that is currently unchecked.
- Do not download files greater than:** A checkbox that is unchecked, followed by a text input field containing '1' and the label 'megabyte(s)'.
- Custom message:** A text area containing the placeholder text 'This message will be added to the email body.' Below it is an example: 'Example: Files {0} are not imported, because of greater than {1} megabyte. All the filenames that were excluded will be written instead of {0} symbol. File size limit will be written instead of {1} symbol.'
- File types:** A text input field.
- Custom message:** A text area containing the placeholder text 'This message will be added to the email body.' Below it is an example: 'Example: Files {0} are not imported. All the filenames that were excluded will be written instead of {0} symbol. File types will be written instead of {1} symbol.'
- Do not download data modified before:** A checkbox that is unchecked, followed by a date picker.
- Do not download data modified after:** A checkbox that is unchecked, followed by a date picker.

At the bottom of the form, there are two buttons: 'BACK' and 'SAVE'.

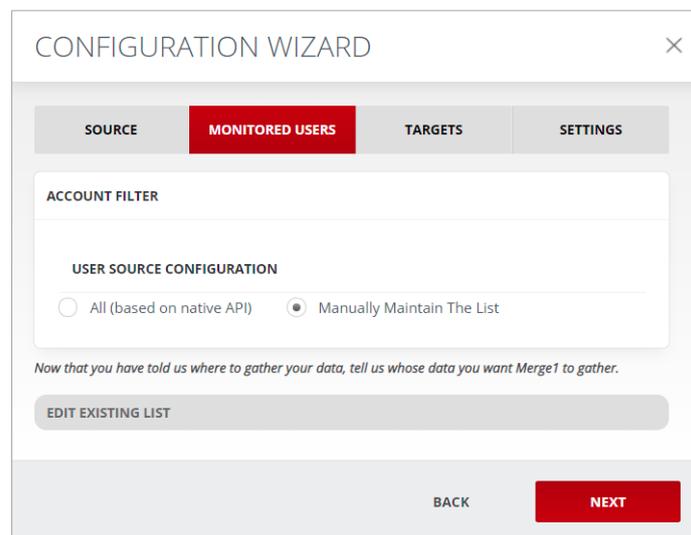
By clicking **Next**, you will be navigated to the [Monitored Users](#) tab.

Monitored Users

Monitored Users are individuals whose data is collected by Merge1. There are two User Sources from where Monitored Users can be added to the connector.

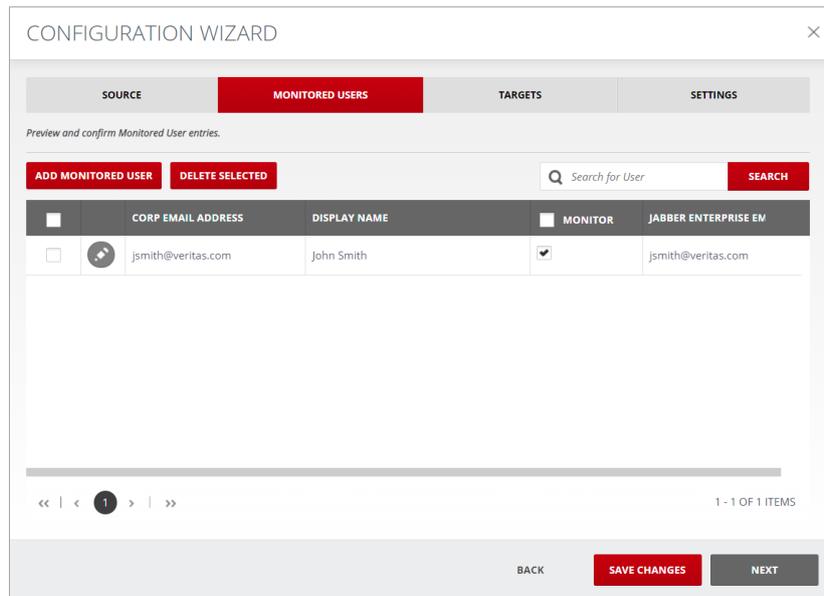
- **All (Based on Native API)**
- **Manually Maintain the List.**

Once **Manually Maintain the List** is selected, the **Edit Existing List** option will appear.



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' (which is highlighted in red), 'TARGETS', and 'SETTINGS'. Under the 'MONITORED USERS' tab, there is an 'ACCOUNT FILTER' section. Below that is the 'USER SOURCE CONFIGURATION' section, which contains two radio button options: 'All (based on native API)' and 'Manually Maintain The List'. The 'Manually Maintain The List' option is selected. Below the radio buttons is a line of text: 'Now that you have told us where to gather your data, tell us whose data you want Merge1 to gather.' Underneath this text is a button labeled 'EDIT EXISTING LIST'. At the bottom of the wizard are two buttons: 'BACK' and 'NEXT' (which is highlighted in red).

This will allow manually adding and managing users.



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.

The screenshot shows a 'CONFIGURATION WIZARD' window with a 'TARGETS' tab selected. The interface includes a navigation bar with 'SOURCE', 'MONITORED USERS', 'TARGETS', and 'SETTINGS' tabs. Below the navigation bar, there is a message: 'Please provide your M365 Ingestion Service configuration so that Merge1 can deliver your data.' The main form area contains two sections: 'Target Information' and 'AUTHORIZATION'. In the 'Target Information' section, 'Target Name *' is 'M365 Ingestion Target (301)' and 'Target Type' is 'M365 Ingestion Service'. In the 'AUTHORIZATION' section, 'Tenant ID' and 'MS Job ID' are both '74a05e7c-a8e5-4546-9f00-16'. A red 'TEST CONNECTION' button is located below the authorization fields. At the bottom right of the wizard, there are 'BACK' and 'NEXT' buttons, with 'NEXT' being a red button.

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.

2. **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.

3. **Message Subject:** Enter the subject for the report message.
4. **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 the 'CONFIGURATION WIZARD' interface with the 'SETTINGS' tab selected. The 'ALERTING' section is expanded, showing the following configuration:

- ENABLE ALERTING**
- ALERTING LEVEL**
 - Error
 - Warning
- Buffer Size:
- Recipient Email: **SEND TEST EMAIL**

At the bottom of the wizard, there are 'BACK' and 'SAVE & FINISH' buttons.

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.

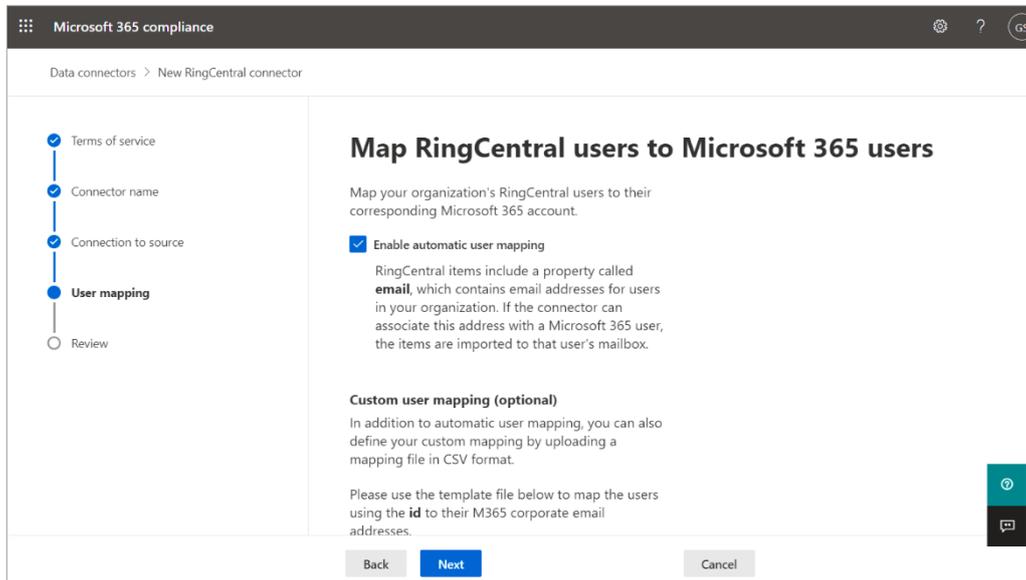
To configure the alerting, specify the **Buffer Size**.

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

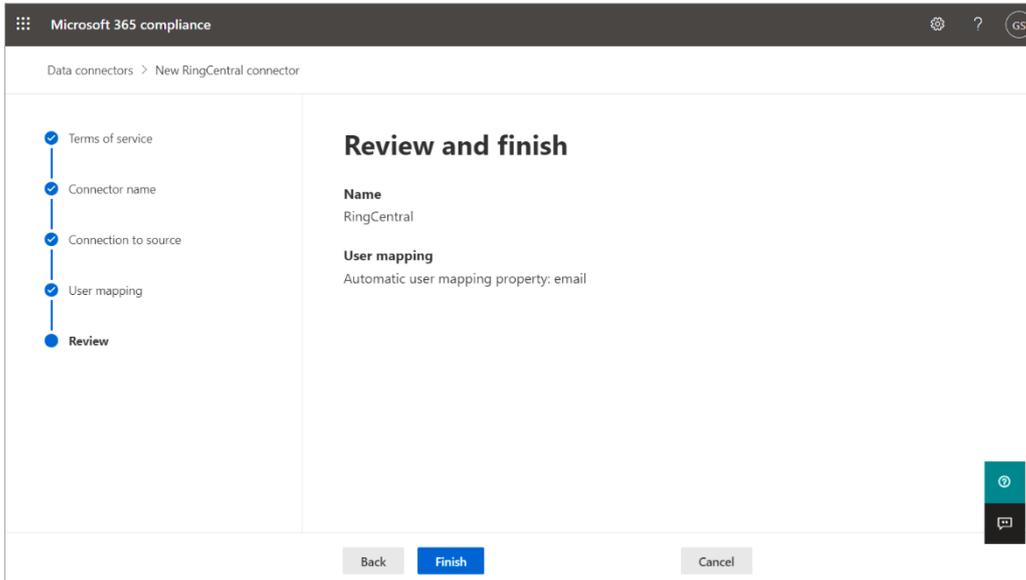
Provide the required user mapping.



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!

