

**VERITAS™**

**Third-Party  
Connectors**

**Salesforce Chatter**

User Guide



**MERGE1**

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# CONTENTS

CONTENTS .....	3
<b>INTRODUCTION.....</b>	<b>4</b>
OVERVIEW .....	5
PRE-REQUISITES .....	5
ACCESSING THE DATA CONNECTORS .....	6
<b>SETTING UP SALESFORCE CHATTER.....</b>	<b>8</b>
OVERVIEW .....	9
TERMS OF SERVICE .....	9
CONNECTOR NAME .....	10
CONNECTION TO SOURCE.....	11
<b>CONFIGURING THE SALESFORCE CHATTER CONNECTOR.....</b>	<b>14</b>
CREATING A SALESFORCE APPLICATION AND ACQUIRING A TOKEN.....	15
SOURCE CONFIGURATION .....	21
MONITORED USERS .....	22
TARGETS .....	24
SETTINGS .....	24
USER MAPPING.....	27
REVIEW .....	28



# 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 Salesforce Chatter 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 Salesforce Chatter connector. Here you will need to contact [Veritas Customer Support](#). You will sign into this account when you create the connector.
- Create a Salesforce application and acquire a token at <https://Salesforce.com>. You need to log into the Salesforce account as an admin user and get a user personal token to import data. Besides, triggers need to be published on the Chatter site to be able to capture updates, deletes, and edits. The triggers will create a post in a channel and Merge1 will capture the information from the channel.

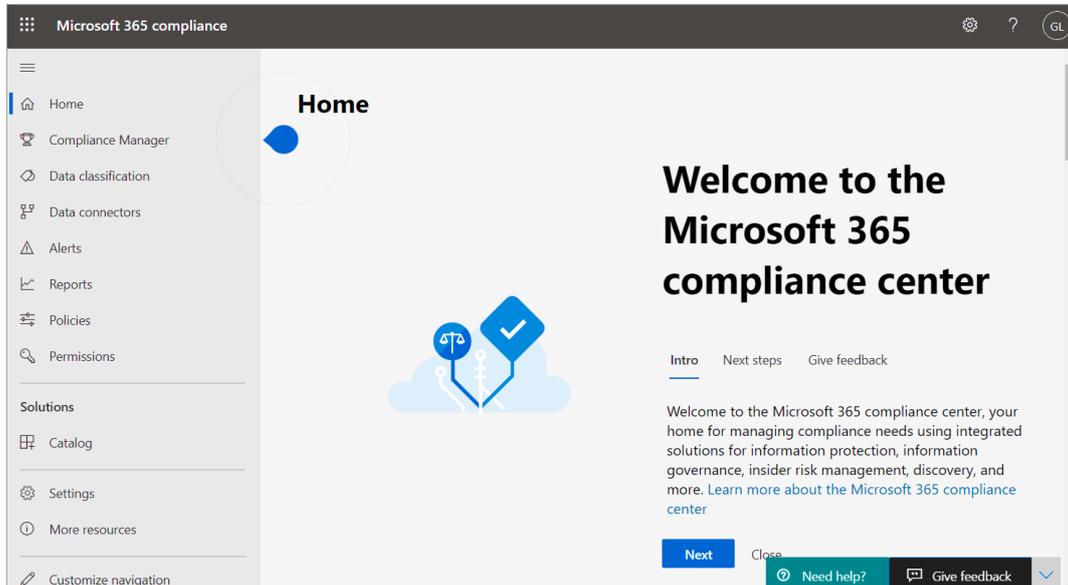
For step-by-step instructions on how to create the applications, see [Creating a Salesforce Application and Acquiring a Token](#).

- The user, who creates the Salesforce Chatter 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”.

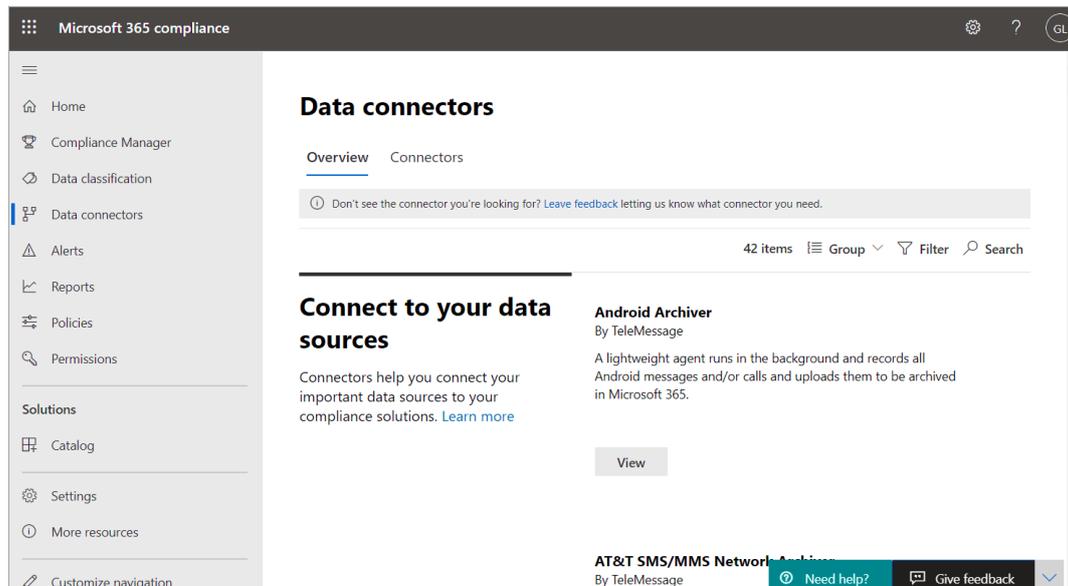
# Accessing the Data Connectors

To access the Data Connectors, follow the steps below:

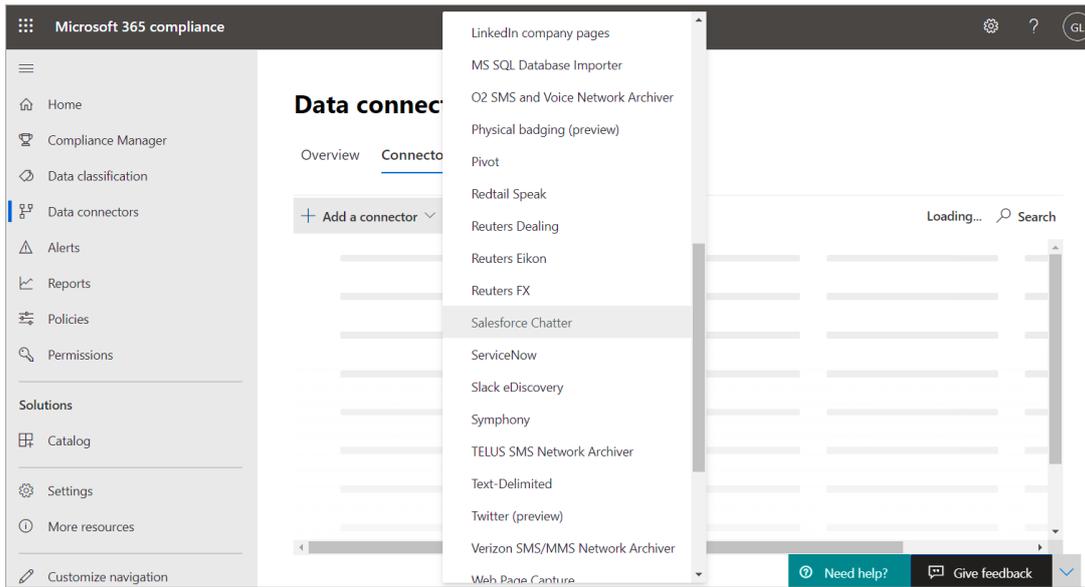
1. Go to <https://compliance.microsoft.com> web page.



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 **Salesforce Chatter** from the list. For more details on how to set up the connector see [SETTING UP SALESFORCE CHATTER](#).



## CHAPTER 2

# Setting Up Salesforce Chatter

This chapter represents:

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

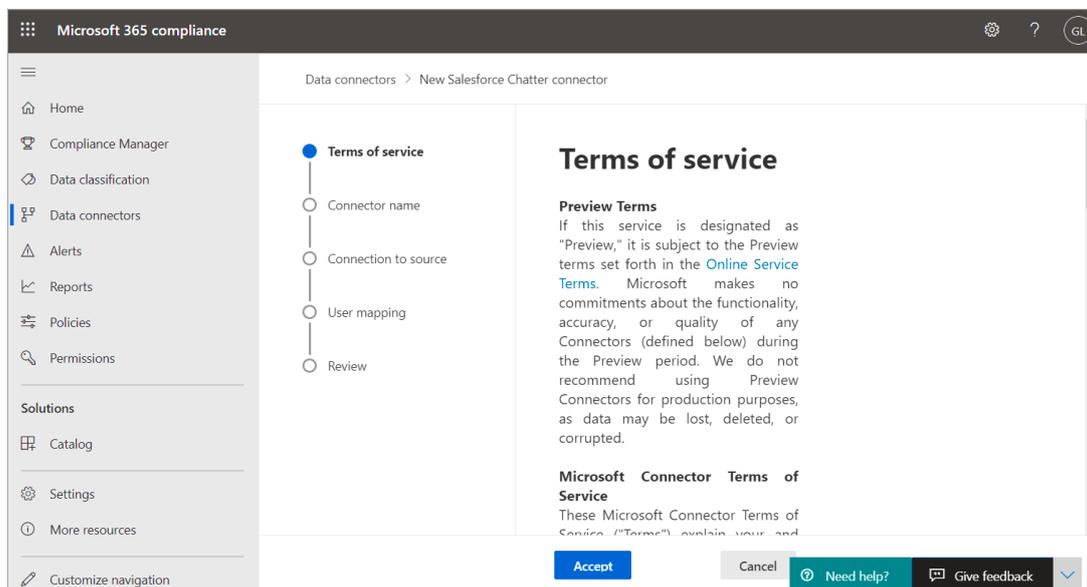
## Overview

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

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

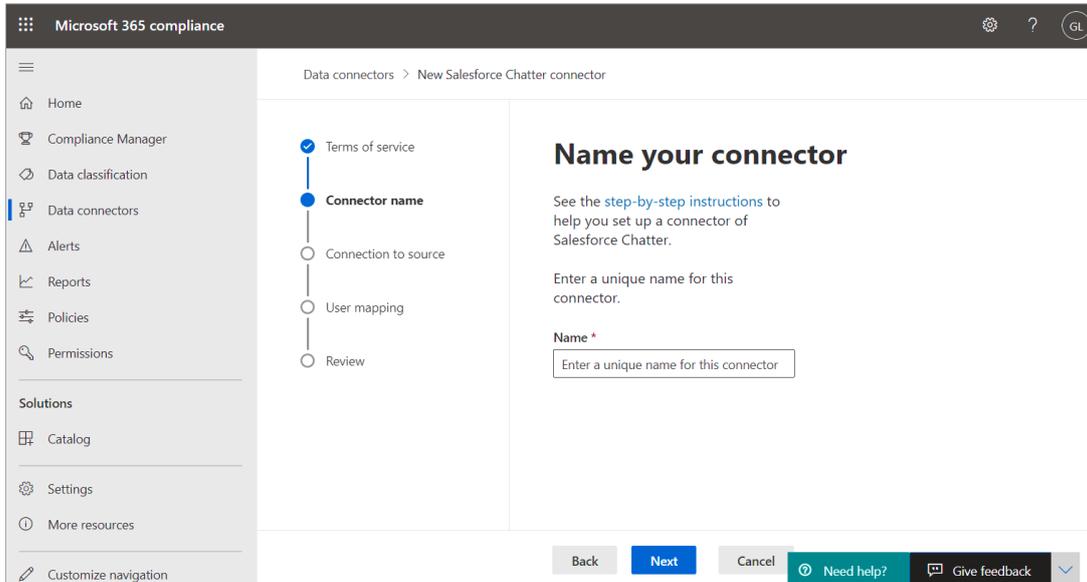
## Terms of Service

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

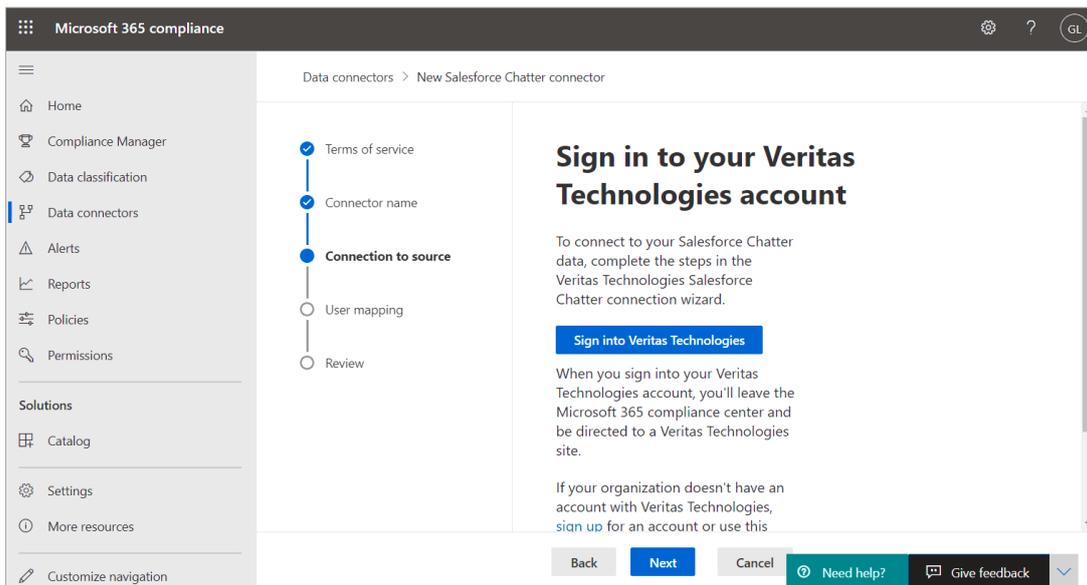


## Connector Name

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



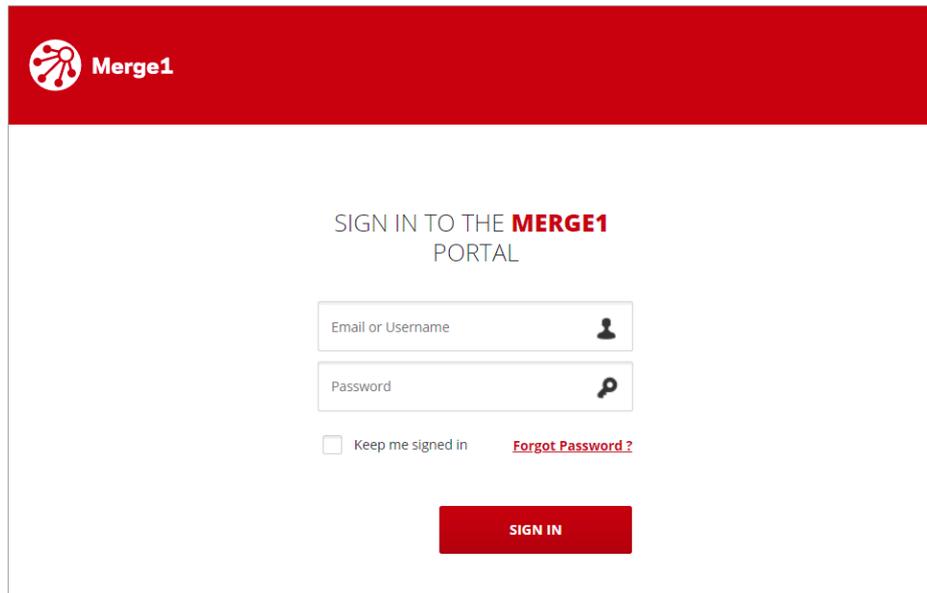
Click **Next**, to be navigated to the **Sign in to your Veritas Technologies account** page.



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. Below the password field is a checkbox labeled "Keep me signed in" and a link labeled "Forgot Password?". At the bottom center is a red button labeled "SIGN IN".

Salesforce Chatter 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.

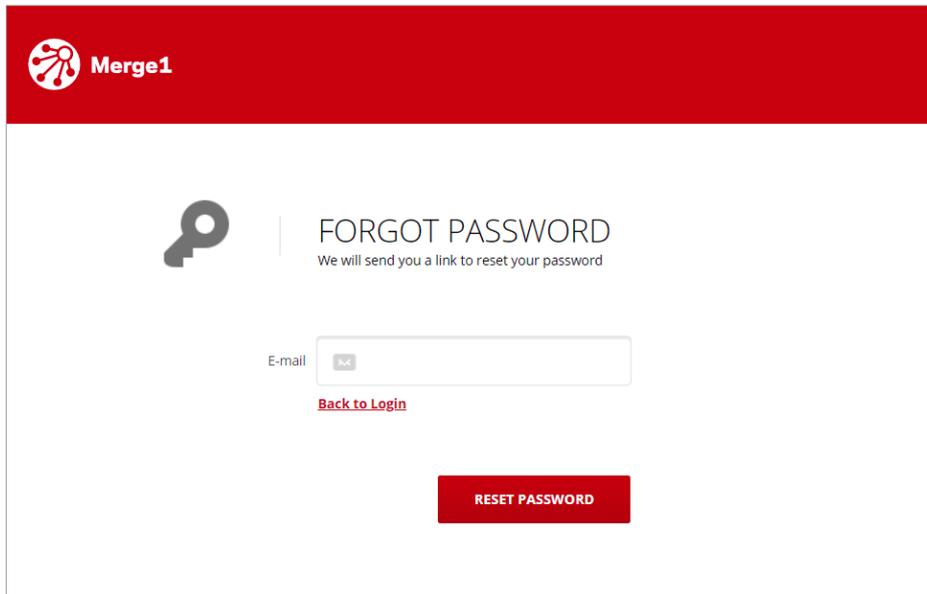
## Password Recovery

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

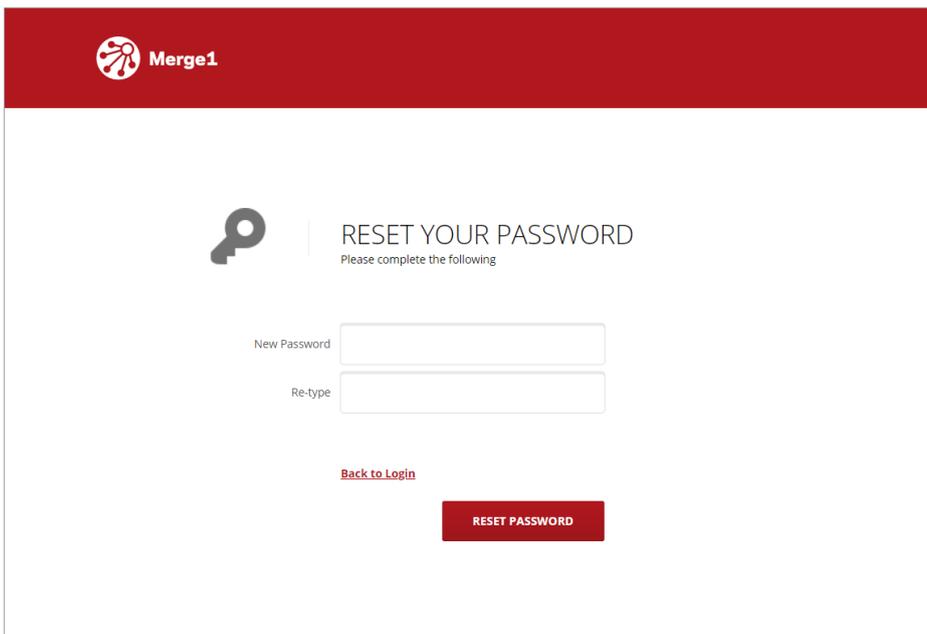
 **FORGOT PASSWORD**  
We will send you a link to reset your password

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 for Veritas Merge1 Microsoft Connectors. The form is titled "Microsoft Connectors Merge1" and includes a "Submit form" button. The form fields are: Email Address\*, Country\*, First Name\*, Last Name\*, Company\*, and Phone Number\*. A "Required Field" label is present above the form. The form also includes a "Submit form" button and the Microsoft logo.

VERITAS

### Microsoft Connectors

### Merge1

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.

#### Connector Types

Merge1 extends your email archive to support additional content sources, including social media, enterprise social, text, IM, financial messaging platforms, files and custom content.

\*Required Field

Please fill out this form to be contacted promptly.

Email Address\*

Country\*

- Please Select -

First Name\*

Last Name\*

Company\*

To select, begin typing.

Phone Number\*

🇺🇸 (201) 555-5555

Submit form

Microsoft

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 Salesforce Chatter from the Merge1 product.

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



## CHAPTER 3

# Configuring the Salesforce Chatter Connector

This chapter represents:

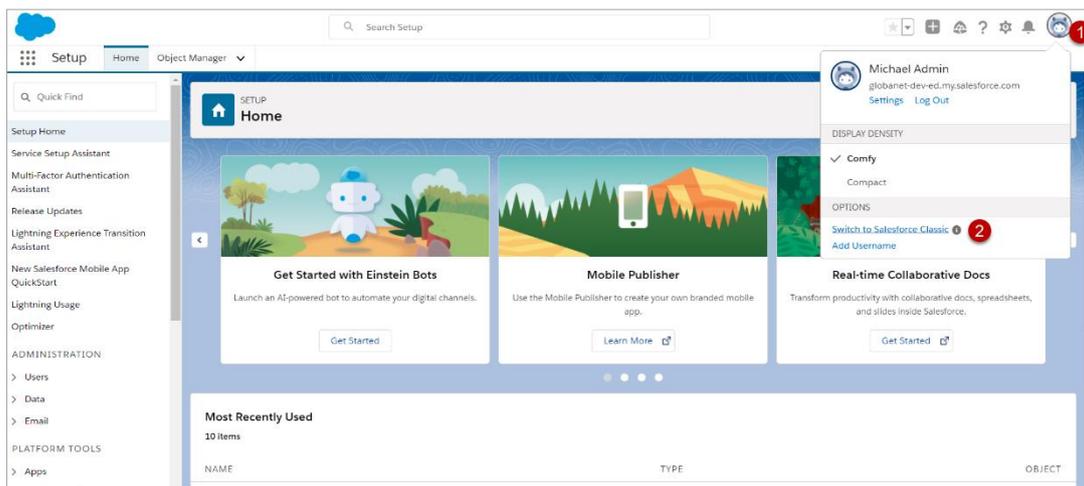
- Creating a Salesforce Application and Acquiring a Token
- Source
- Monitored Users
- Targets
- Settings
- User Mapping
- Review

# Creating a Salesforce Application and Acquiring a Token

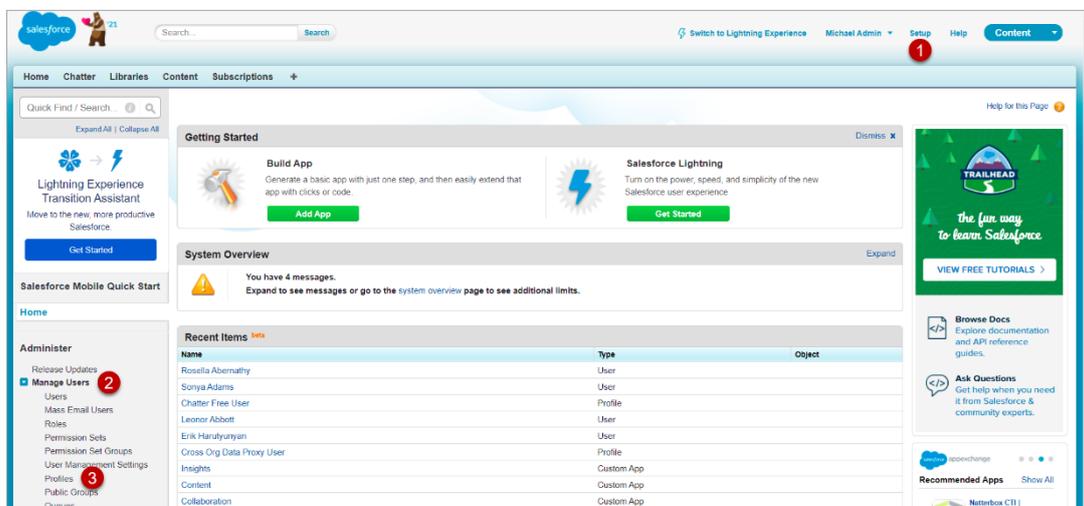
To perform the steps below you will need a Salesforce account with a System Administrator profile. If you do not have access to a System Administrator user, please contact your Salesforce admin and ask for the permissions:

## Step 1: Creating a profile

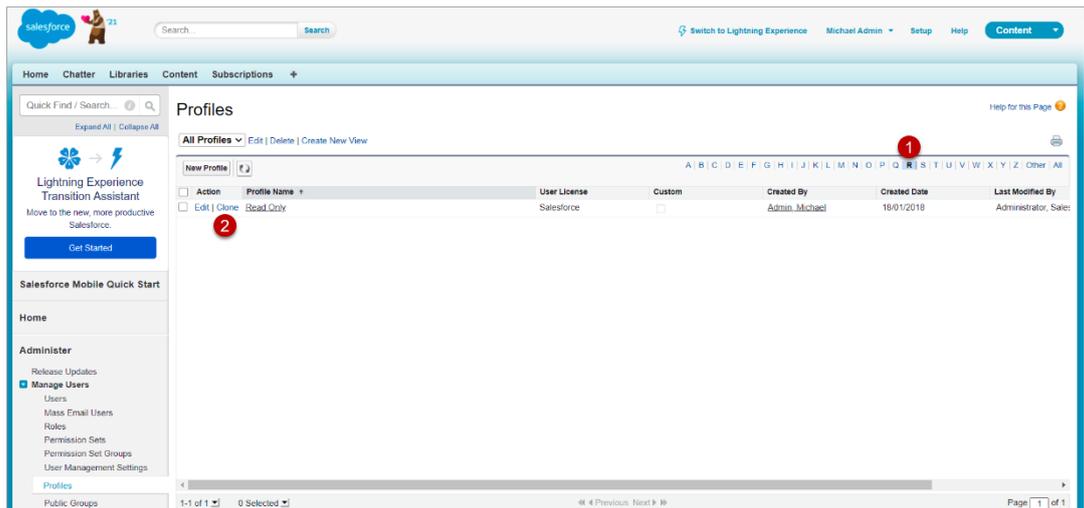
1. Log in to Salesforce at [www.Salesforce.com](http://www.Salesforce.com), using an account that has the System Administrator profile and switch to **Salesforce Classic** (if you are using the Lightning Experience).



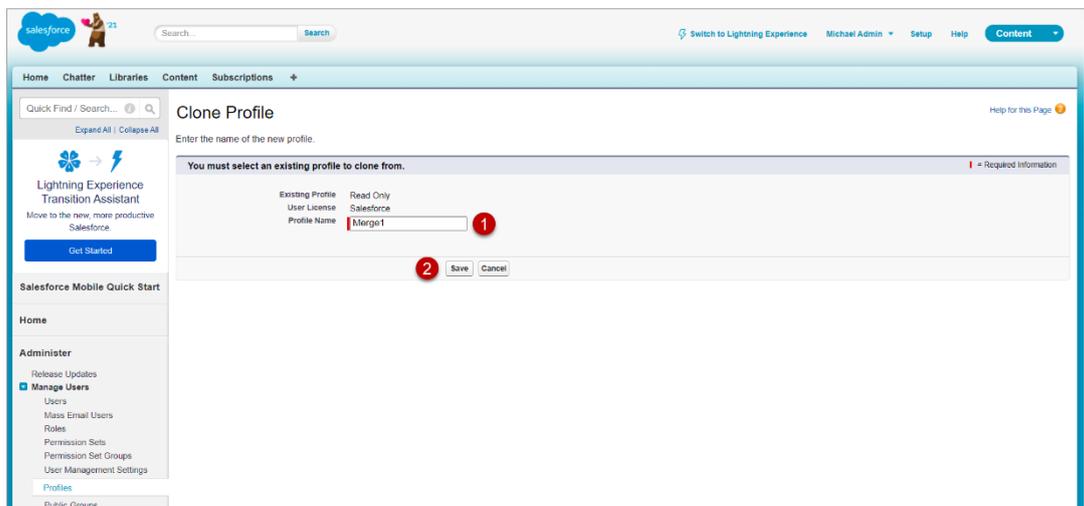
2. Click **Setup**, then expand **Manage Users** and click **Profiles**.



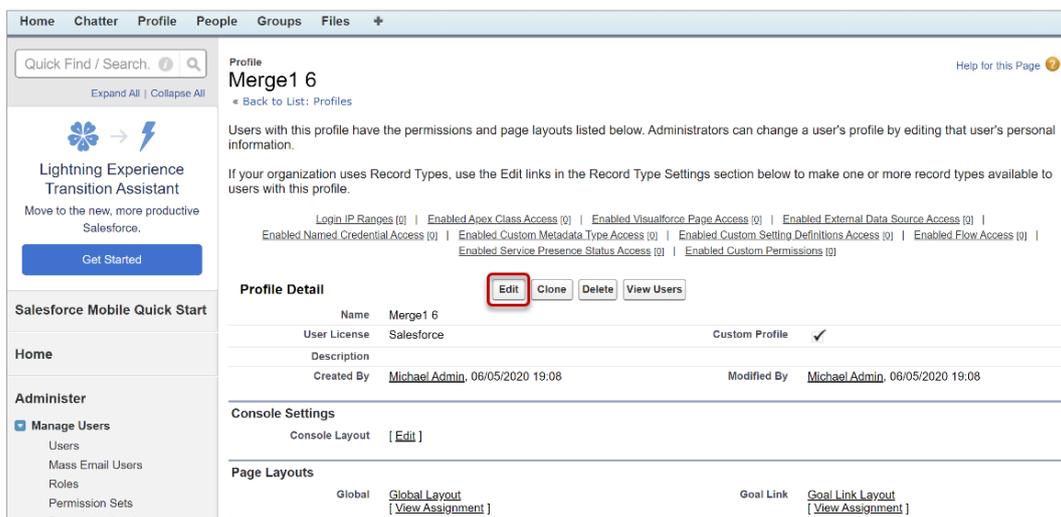
3. Find the **Read Only** profile name and click the **Clone** button.



4. Enter a **Profile Name** for the profile and click the **Save** button.



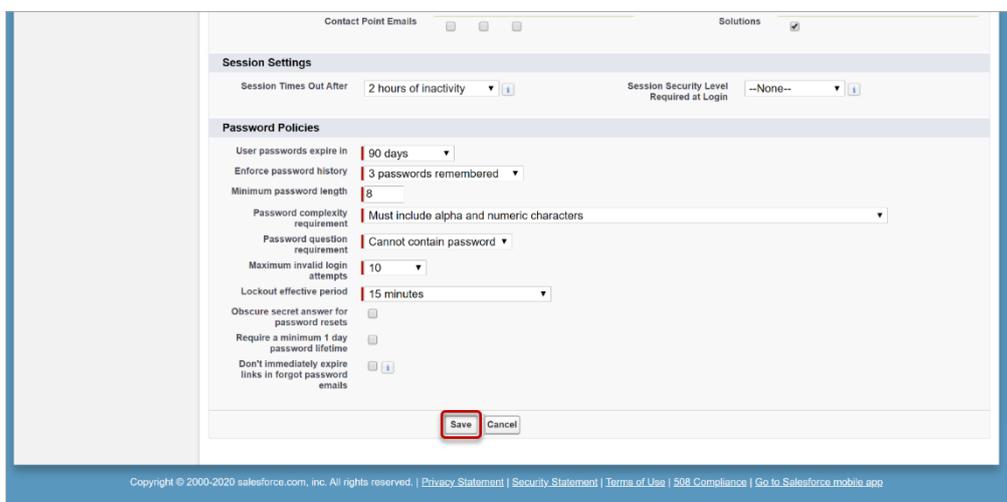
5. Click **Edit**.



The required administrative permissions for Merge1 are:

- API Enabled
- Select Files from Salesforce
- Manage Chatter Messages and Direct Messages
- Manage Unlisted Groups (Required only if the Unlisted Groups feature is enabled in the given Salesforce environment.)
- View All Data
- Modify All Data (Only if capturing Feedpoll Choices is required, otherwise can be ignored but errors will be present in the connector log. This is a limitation from Salesforce).

**6.** Scroll down and click **Save**.

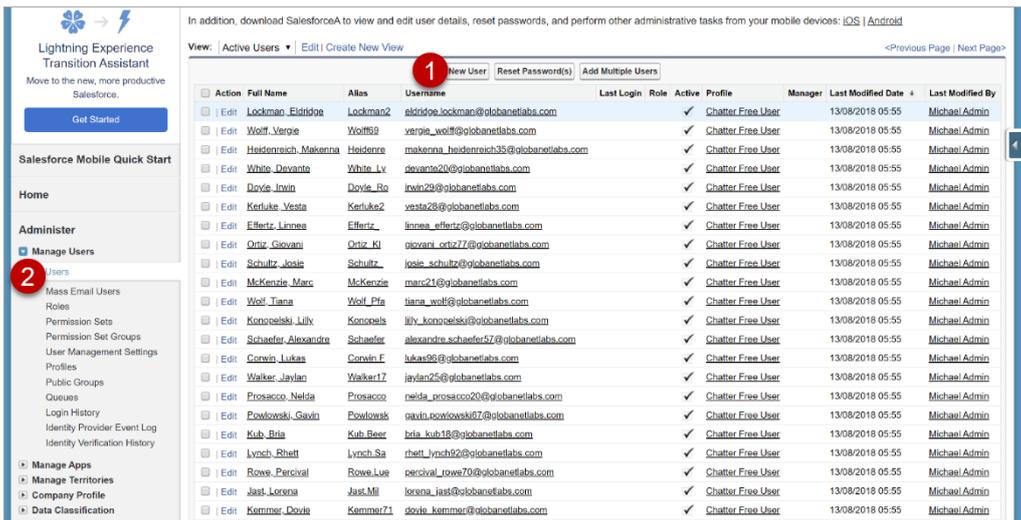


**Step 2: Creating a User (Service Account)**

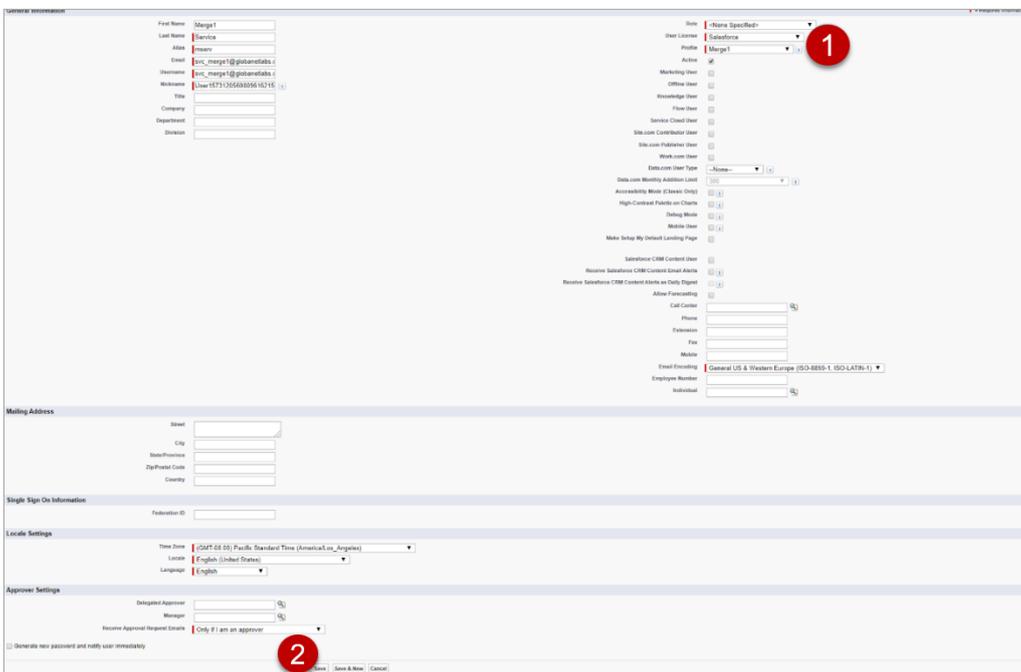
- 1.** Go to the Users page and click New User.

## Third-Party Connectors | User Guide

### Configuring the Salesforce Chatter Connector



- Populate the required fields and select **Salesforce** as **User License**, and the profile created in the below screenshot (in this case the profile name is Merge1), then scroll down and click **Save**.

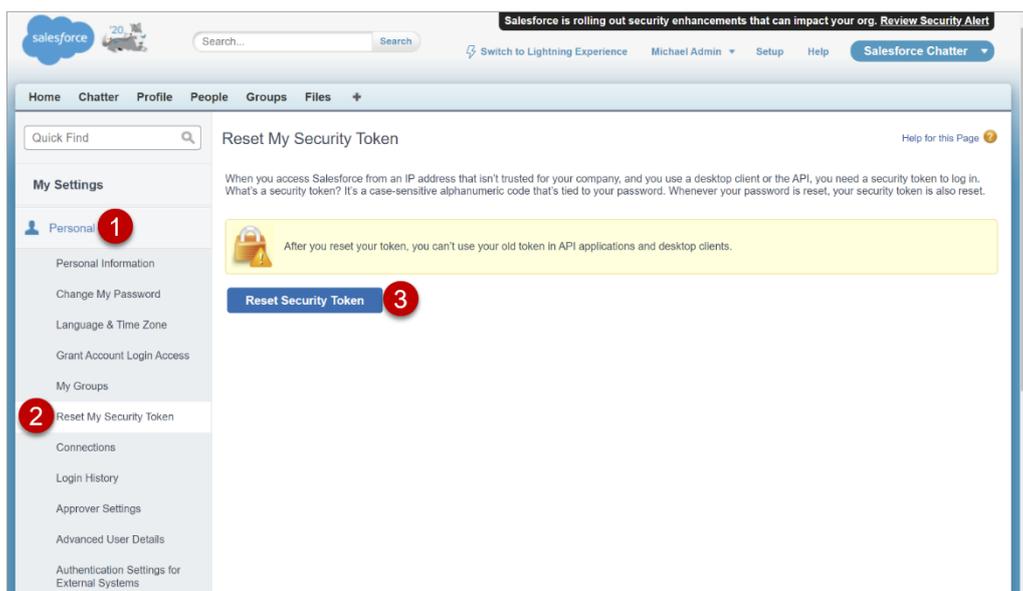


### Step 3: Retrieving Access Token

- Click your Username at the top right corner of the screen and select **My Settings**.



2. In the navigation pane to the left, under **Personal** section, choose **Reset My Security Token**, then click **Reset Security Token**. The new token will be sent to the email associated with your account.



If you want to enable Merge1 to collect deleted or updated comments and posts in Chatter, ask your Salesforce administrator to perform the following steps in the Chatter UI:

1. Create a new **Private Group** ensuring they do not automatically archive this group. **Private** and **Broadcast Only** options are selected.

Home Chatter Profile People **Groups** Files +

Group Edit  
New Group Help for this Page

Save Cancel

**Basic Information** ! = Required Information

Group Name Private Group

Owner Owner

Description

Automatic Archiving  Archive this group if there are no posts or comments for 90 days.  
 Don't automatically archive this group

**Group Access**

Public Everyone can see updates and join.

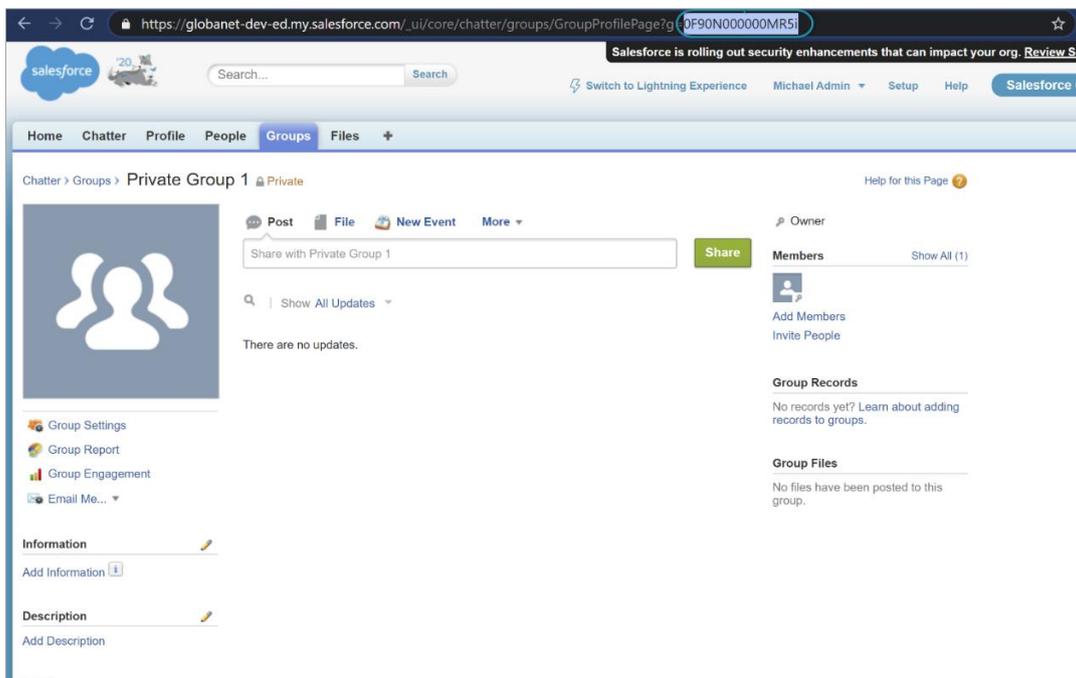
Private Only members can see updates. Membership requires approval. [?](#)

Allow customers You can invite customers to this group.

Broadcast Only Only group owners and managers can create new posts. Group members can comment on the posts. [?](#)

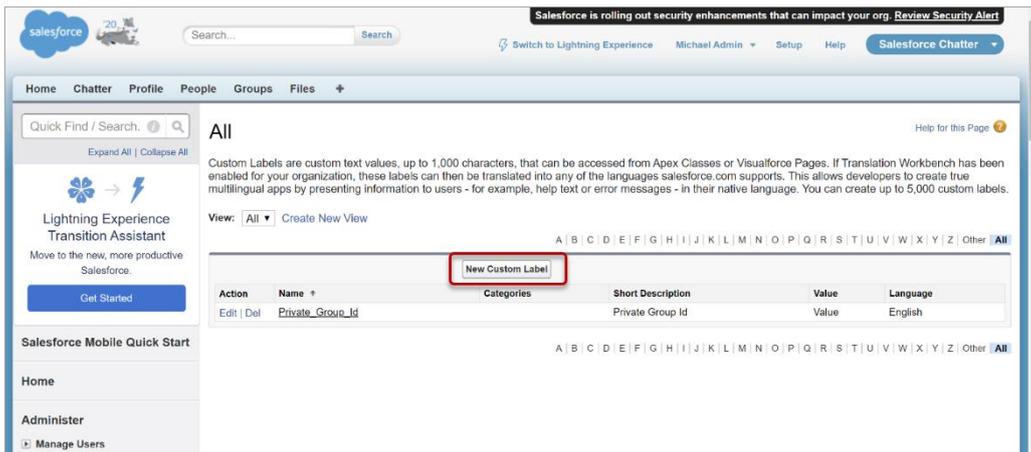
Save Cancel

2. Locate and make a note of the Group ID in the page URL.



3. Create new label **Private Group Id**.

- Go to **Setup > Custom Labels**.
- Click **New Custom Label**.



- Short Description - Private Group Id
- Name - Private\_Group\_Id
- Value - Insert Group Id of Private group.

A screenshot of the 'New Custom Label' form in Salesforce Chatter. The form is titled 'Custom Label Edit' and has three buttons at the top: 'Save', 'Save & New', and 'Cancel'. The form fields are: Short Description (text input), Name (text input), Language (dropdown menu set to 'English'), Protected Component (checkbox checked), Categories (text input), and Value (text input). There are also 'Save', 'Save & New', and 'Cancel' buttons at the bottom of the form.

4. For further instruction on how to create apex triggers, refer to **Chatter Triggers** guide in the installation folder.

## Source Configuration

For Chatter configuration follow the steps below:

1. Enter the **Username** and **Password** of the Chatter Admin account used for app creation.
2. Enter the previously copied **Security Token**.
3. Specify the days, the messages are to be processed.

CONFIGURATION WIZARD

SOURCE MONITORED USERS TARGETS SETTINGS

Please provide the following credentials to your company's Salesforce Chatter account so that Merge1 can be configured to access your monitored users' account data.

If you do not have a token generated for Salesforce Chatter, please [click](#) for more information.

SALESFORCE CHATTER CONFIGURATION

Host

Username

Password

Security Token

Process messages in the last  days

ADVANCED CONFIGURATION OPTIONS

Do not download data modified before:

Do not download data modified after:

NEXT

For advanced configuration options 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.

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, **Edit Existing List** option will appear.

The screenshot shows the 'CONFIGURATION WIZARD' window with the 'MONITORED USERS' tab selected. The window has a close button (X) in the top right corner. Below the tabs, there is an 'ACCOUNT FILTER' section, followed by a 'USER SOURCE CONFIGURATION' section with two radio buttons: 'All (based on native API)' and 'Manually Maintain The List'. Below this is a text prompt: 'Now that you have told us where to gather your data, tell us whose data you want Merge1 to gather.' and an 'EDIT EXISTING LIST' button. At the bottom, there are 'BACK' and 'NEXT' buttons.

This will allow manually adding and managing users.

The screenshot shows the 'CONFIGURATION WIZARD' window with the 'MONITORED USERS' tab selected. The window has a close button (X) in the top right corner. Below the tabs, there is a prompt: 'Preview and confirm Monitored User entries.' Below this are 'ADD MONITORED USER' and 'DELETE SELECTED' buttons, a search bar with 'Search for User' and a 'SEARCH' button. Below the search bar is a table with the following columns: 'CORP EMAIL ADDRESS', 'DISPLAY NAME', 'MONITOR', and 'JABBER ENTERPRISE EM'. The table contains one row with the following data: 'jsmith@veritas.com', 'John Smith', a checked checkbox, and 'jsmith@veritas.com'. Below the table is a pagination bar with '1 - 1 OF 1 ITEMS'. At the bottom, there are 'BACK', 'SAVE CHANGES', and 'NEXT' buttons.

	CORP EMAIL ADDRESS	DISPLAY NAME	MONITOR	JABBER ENTERPRISE EM
<input type="checkbox"/>	jsmith@veritas.com	John Smith	<input checked="" type="checkbox"/>	jsmith@veritas.com

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.

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 are two input fields: 'Message Subject' with the value 'Merge1 Importer Report' and 'Recipient Email' with the value 'admin@merge1.com'. A red 'SEND TEST EMAIL' button is positioned to the right of the 'Recipient Email' field. At the bottom of the wizard, there is an 'ALERTING' section with a plus sign icon, and a footer with 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 'SETTINGS' tab selected. Below the tabs, there are sections for 'REPORTING & MESSAGE TRACKING' and 'ALERTING'. The 'ALERTING' section is expanded and contains the following options:

- ENABLE ALERTING
- ALERTING LEVEL**
  - Error
  - Warning
- Buffer Size:
- Recipient 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.

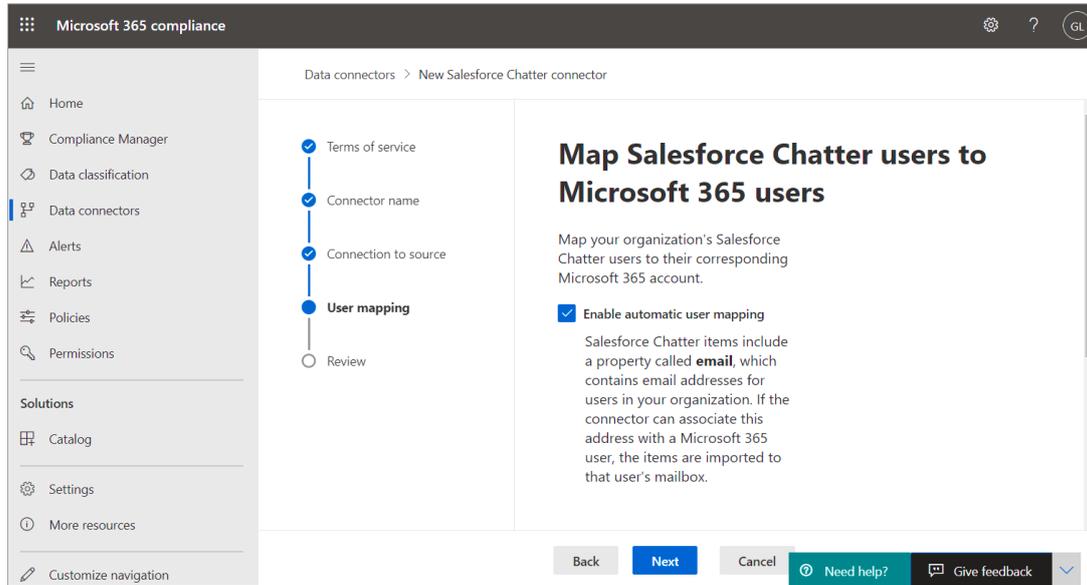
To configure the alerting, specify the **Buffer Size**.

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

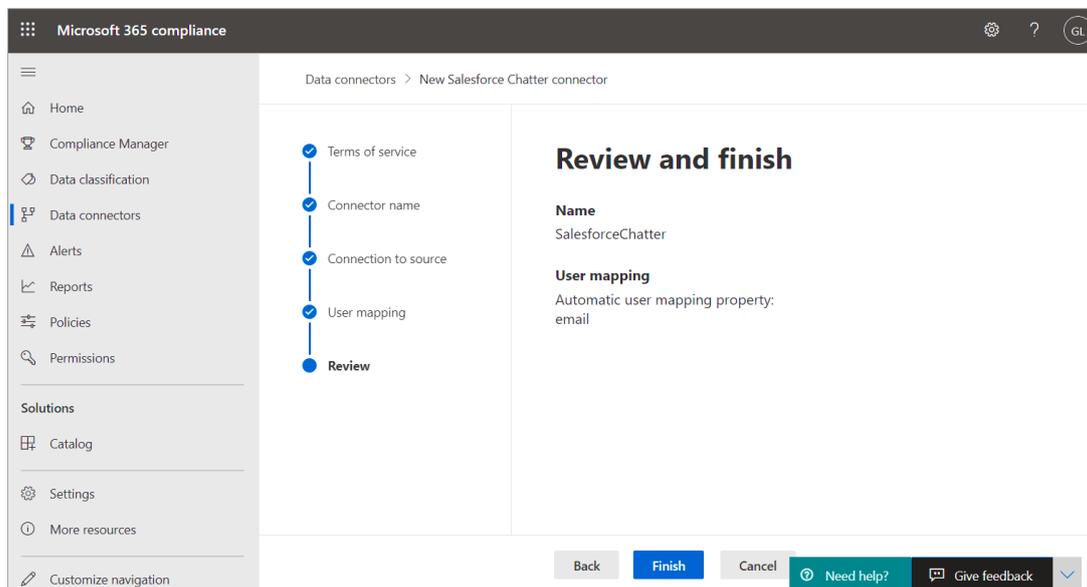
Provide the required user mapping.



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!

