VERITAS™

Third-Party Connectors

Salesforce Chatter

User Guide

MERGE1

LEGAL NOTICE

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CONTENTS

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.

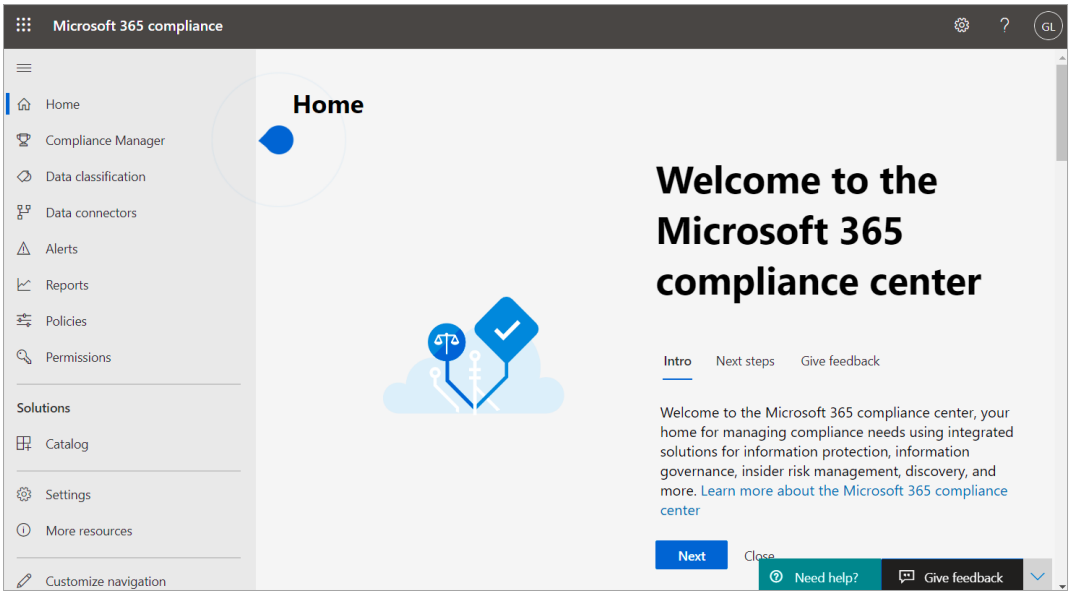
- Create a Merge1 account by accepting their terms and conditions for Salesforce Chatter connector. Here you will need to contact Veritas Customer Support. You will sign into this account when you create the connector.
- Create a Salesforce application and acquire a token at https://Salesforce.com. You 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".

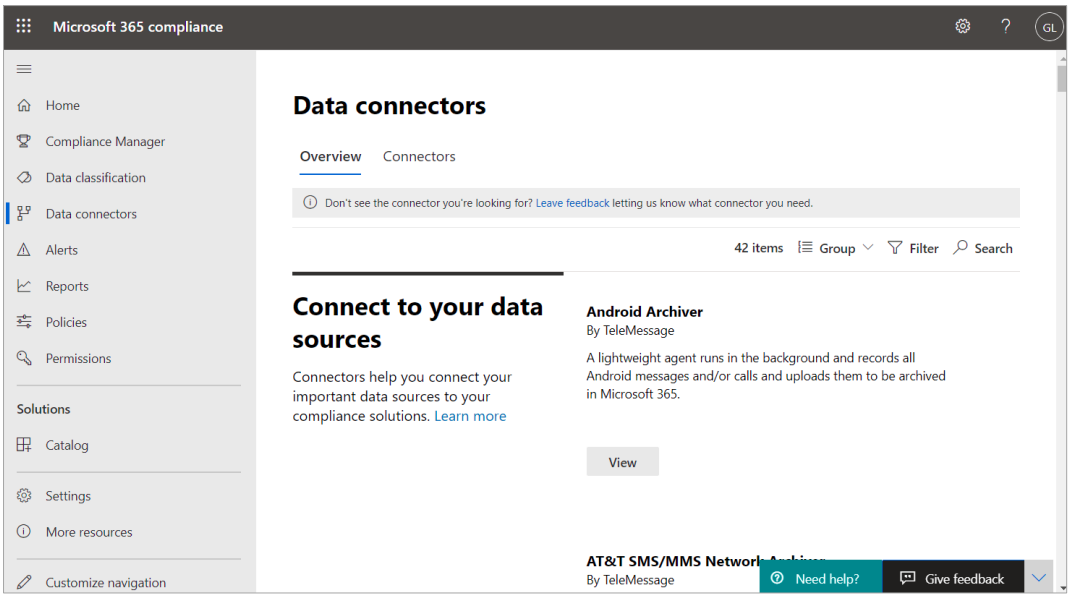
Accessing the Data Connectors

To access the Data Connectors, follow the steps below:

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

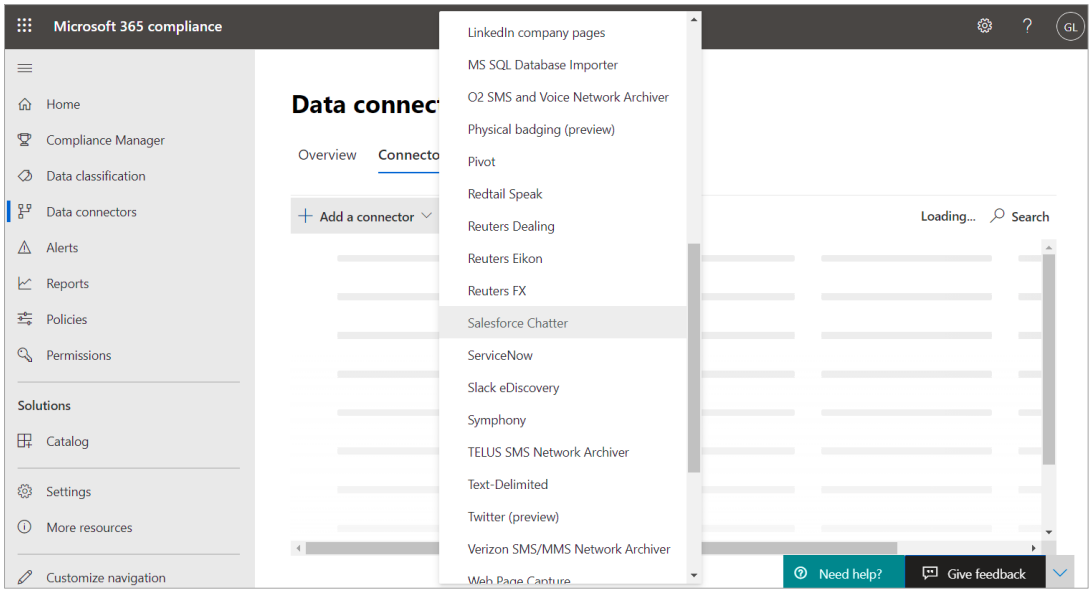


2. Navigate to **Data Connectors**. You will be presented with the **Overview** section of the Data Connectors.



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

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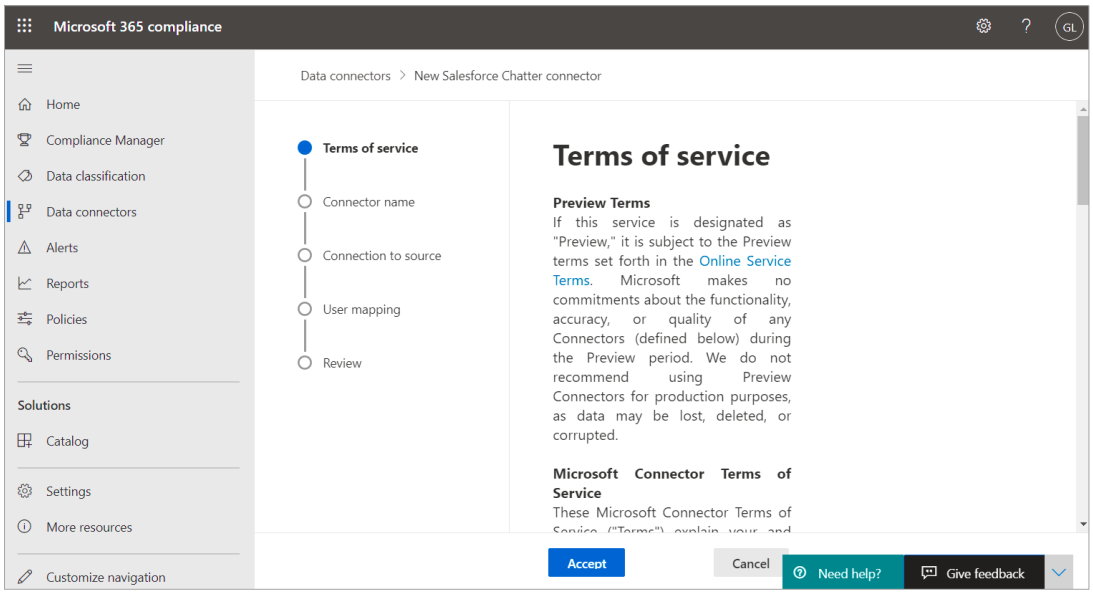
Overview

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.

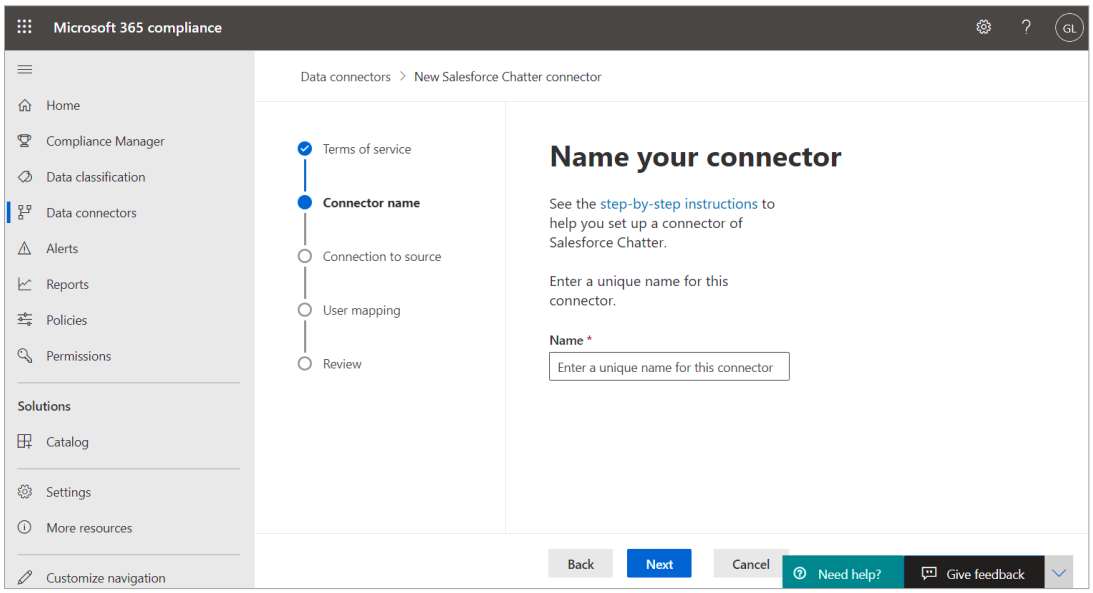
Terms of Service

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

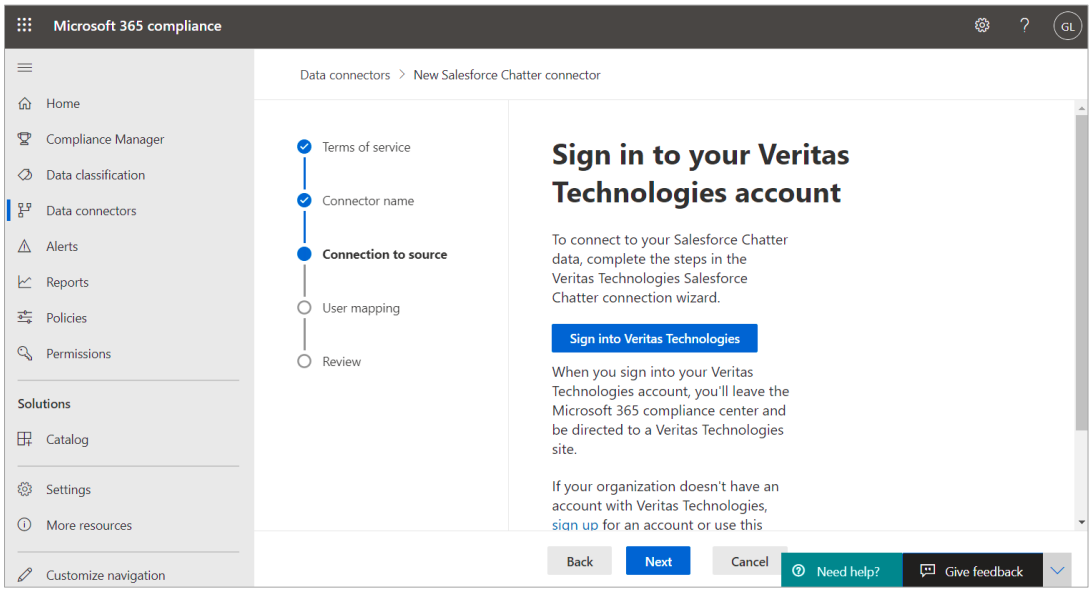


Connector Name

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



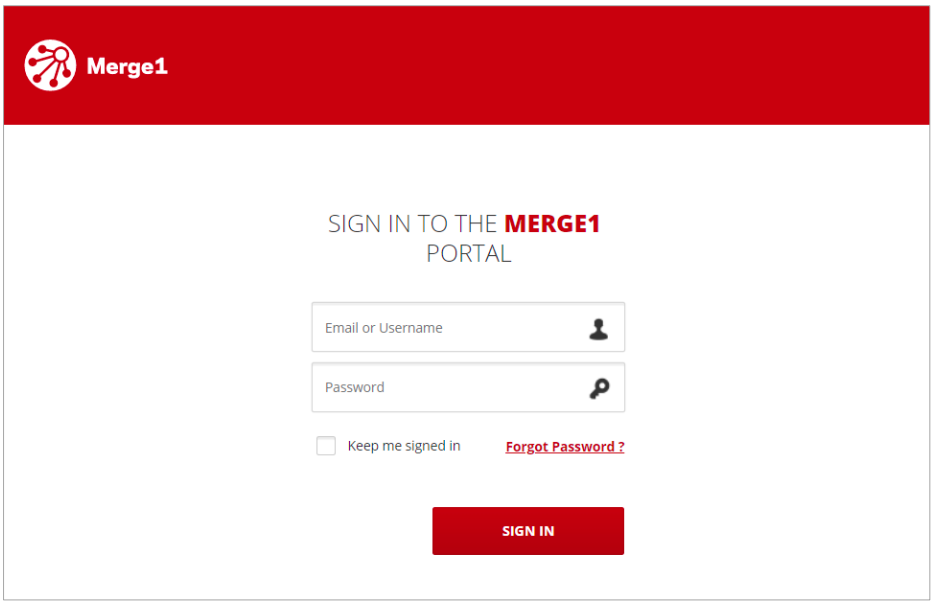
Click **Next**, to be navigated to the **Sign in to your Veritas Technologies account** page.



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.



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.

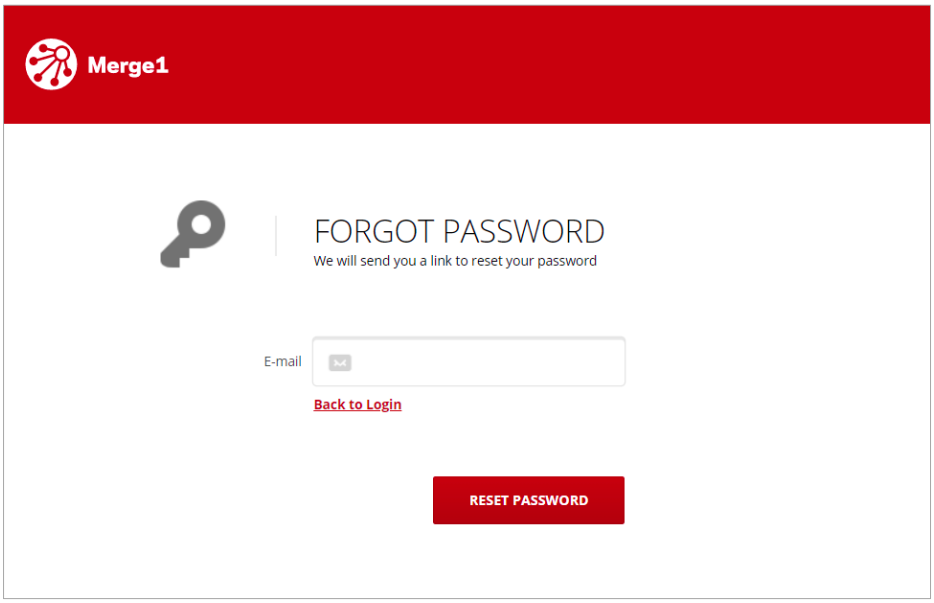
Password Recovery

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:

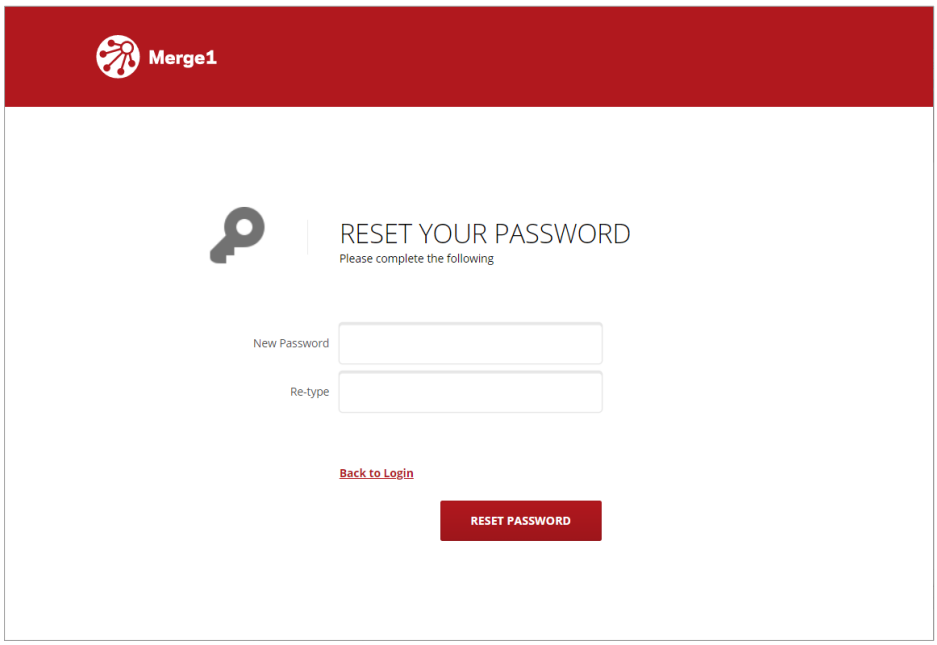
1. Click the **Forgot Password** link in the **Sign in** window.

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



3. Check your email and click the recovery link.

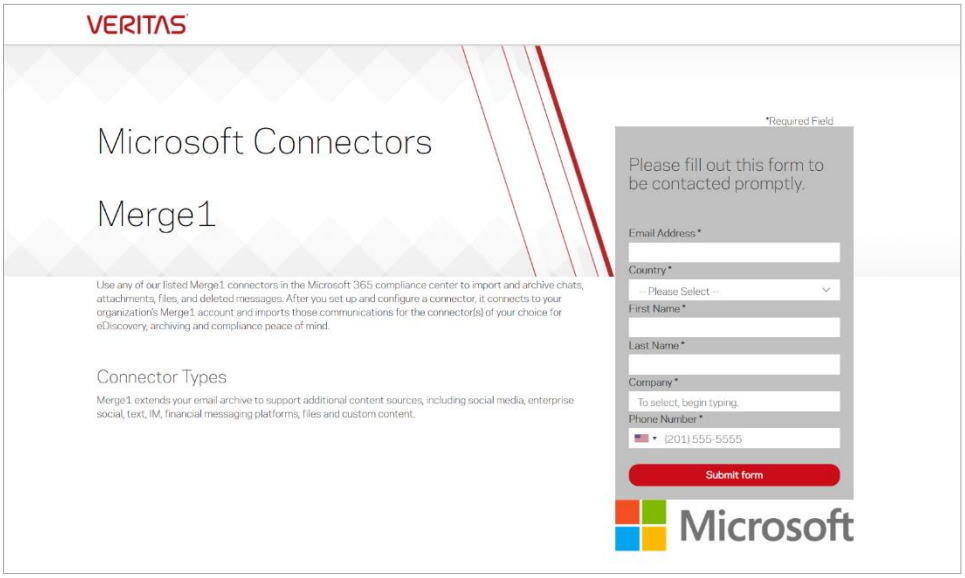
4. Provide a new password and re-enter it for verification.



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 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

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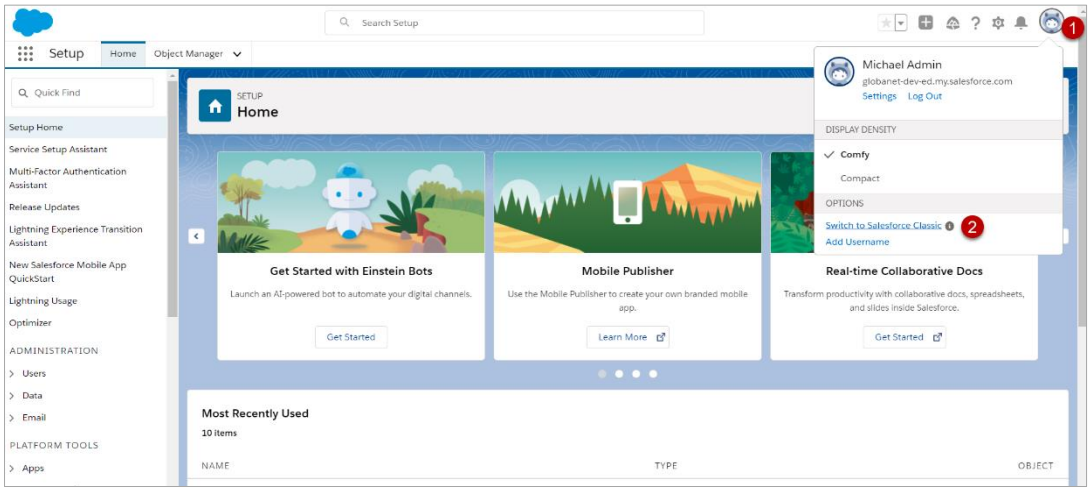
Creating a Salesforce Application and Acquiring a Token

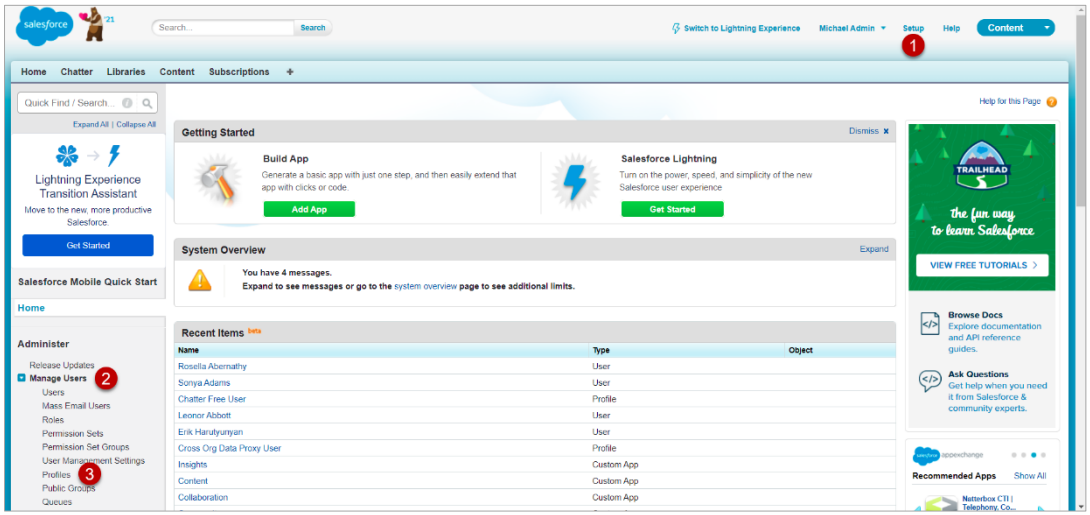
To perform the steps below you will need a Salesforce account with a System Administrator profile. If you do not have access to a System Administrator user, please contact your Salesforce admin and ask for the permissions:

Step 1: Creating a profile

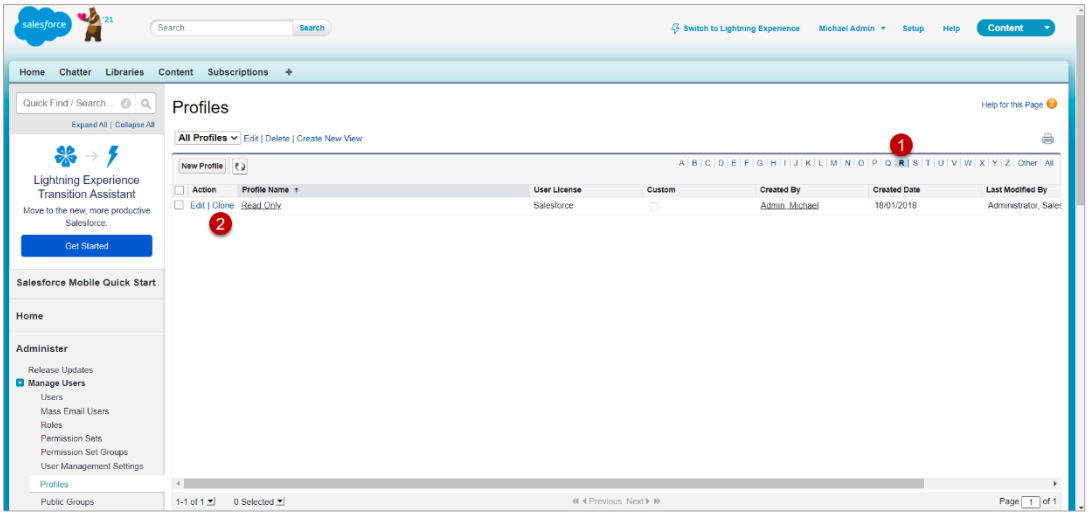
1. Login to Salesforce at www.Salesforce.com, using an account that has the System Administrator profile and switch to **Salesforce Classic** (if you are using the Lightning Experience).



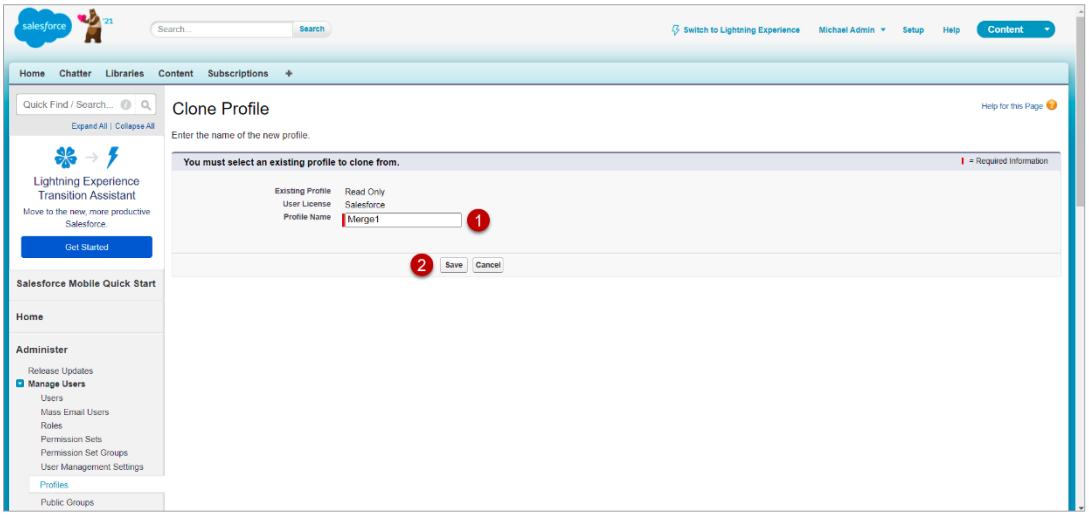
2. Click **Setup**, then expand **Manage Users** and click **Profiles**.



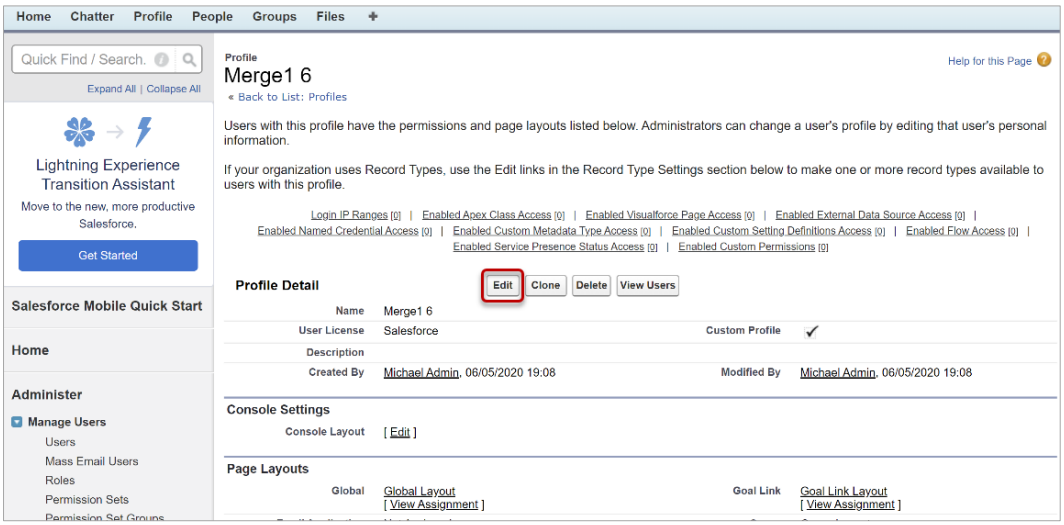
3. Find the **Read Only** profile name and click the **Clone** button.



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



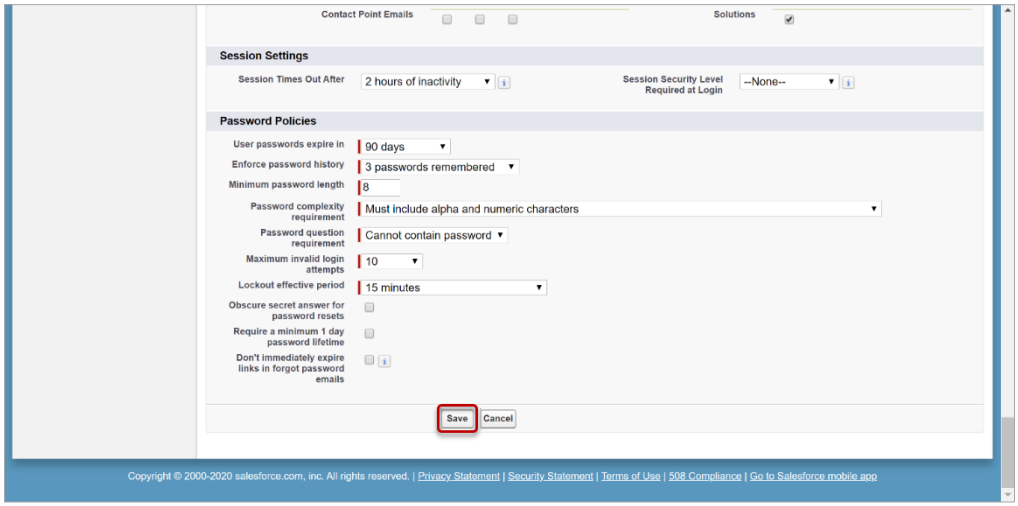
5. Click **Edit**.



The required administrative permissions for Merge1 are:

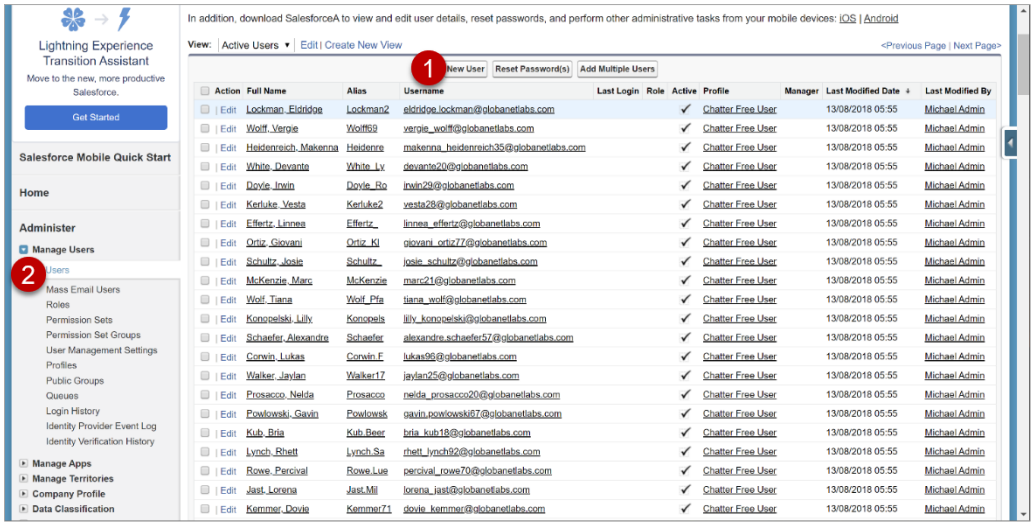
- API Enabled
- Select Files from Salesforce
- Manage Chatter Messages and Direct Messages
- Manage Unlisted Groups (Required only if the Unlisted Groups feature is enabled in the given Salesforce environment.)
- View All Data
- Modify All Data (Only if capturing Feedpoll Choices is required, otherwise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

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

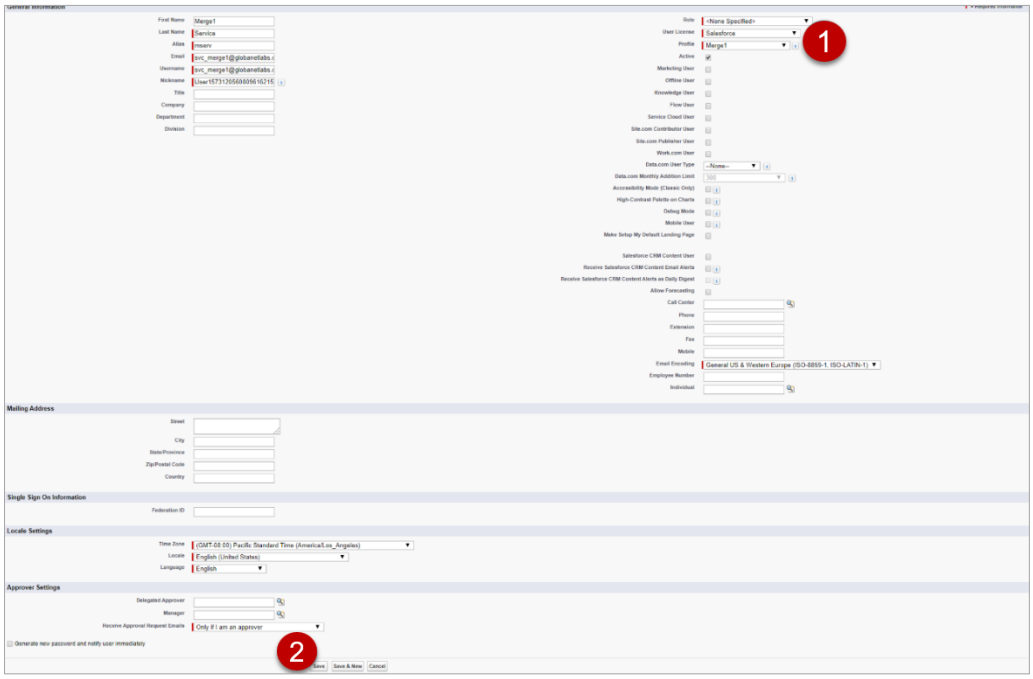


Step 2: Creating a User (Service Account)

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

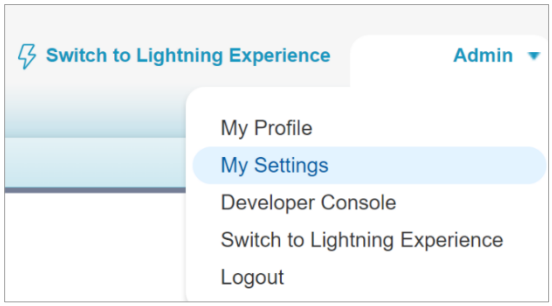


2. Populate the required fields and select **Salesforce** as **User License**, and the profile created in the below screenshot (in this case the profile name is Merge1), then scroll down and click **Save**.

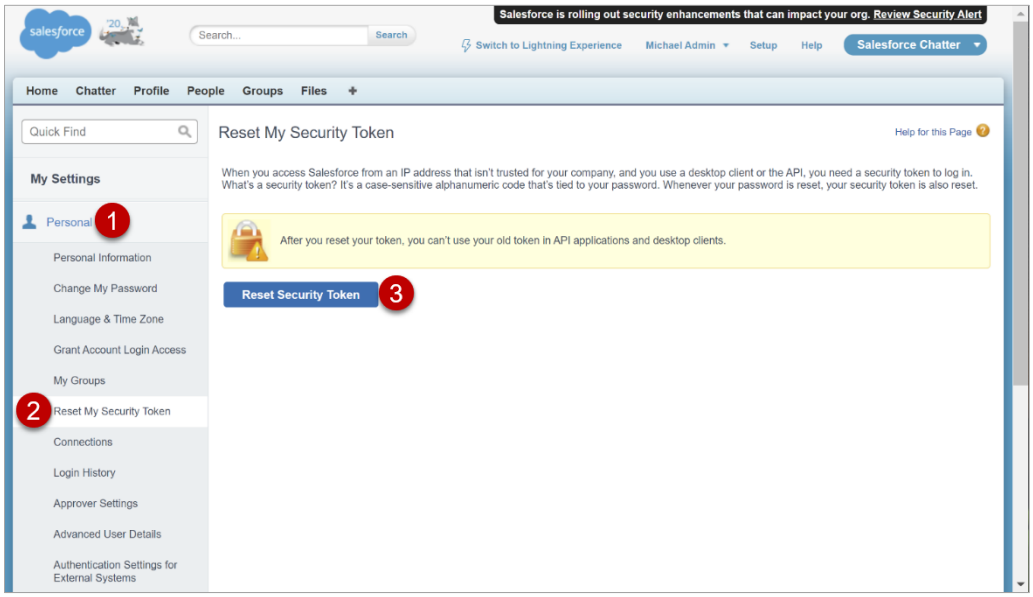


Step 3: Retrieving Access Token

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

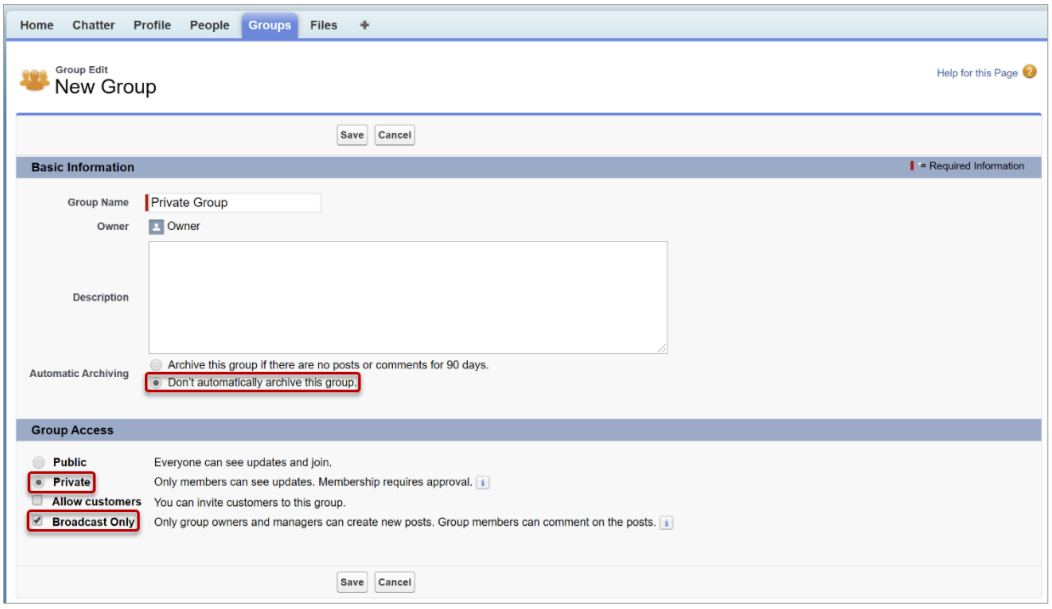


2. In the navigation pane to the left, under **Personal** section, choose **Reset My Security Token**, then click **Reset Security Token**. The new token will be sent to the email associated with your account.

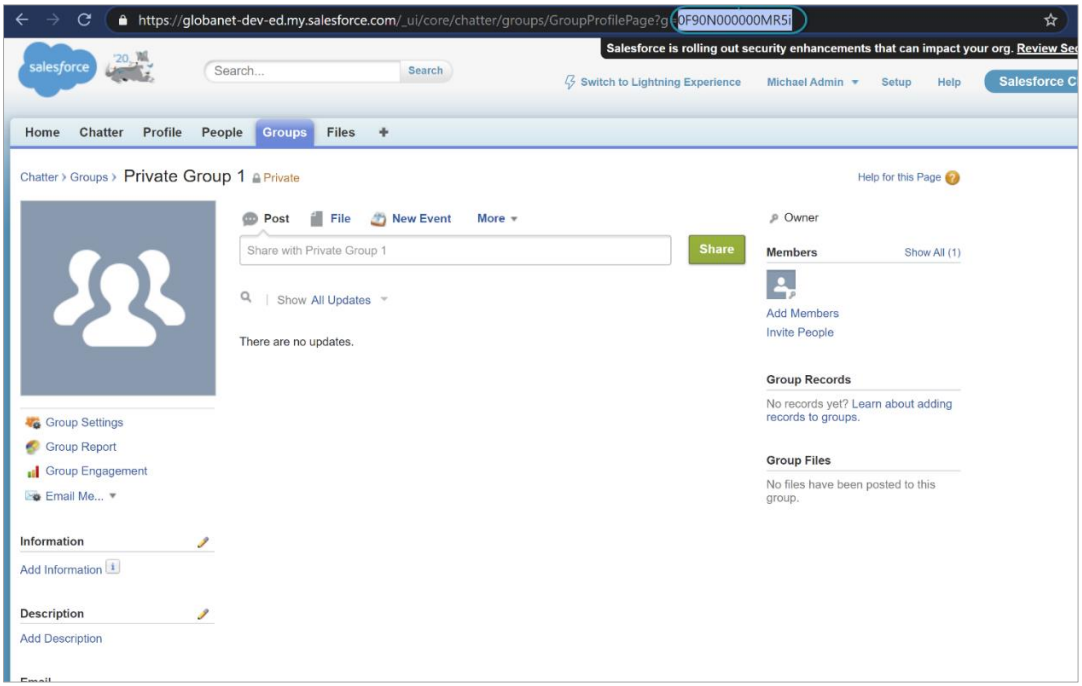


If you want to enable Merge1 to collect deleted or updated comments and posts in Chatter, ask your Salesforce administrator to perform the following steps in the Chatter UI:

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

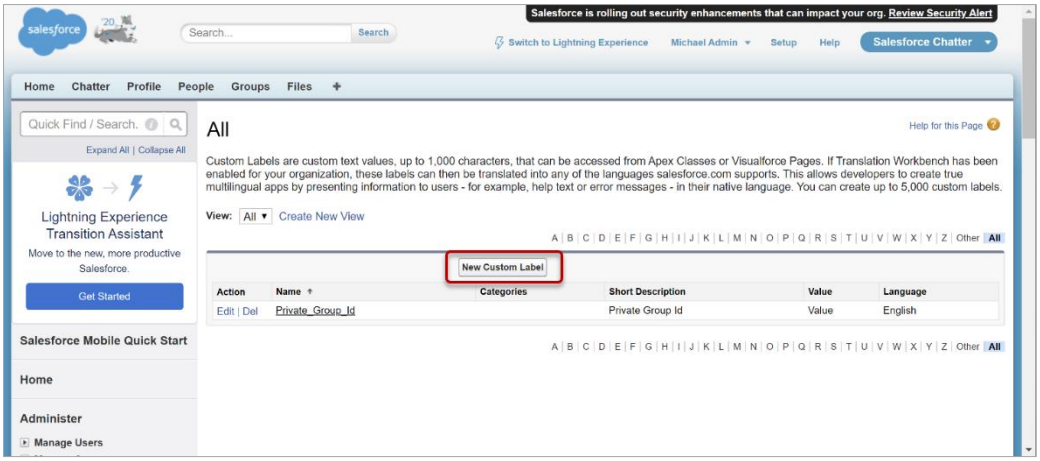


2. Locate and make a note of the Group ID in the page URL.



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

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



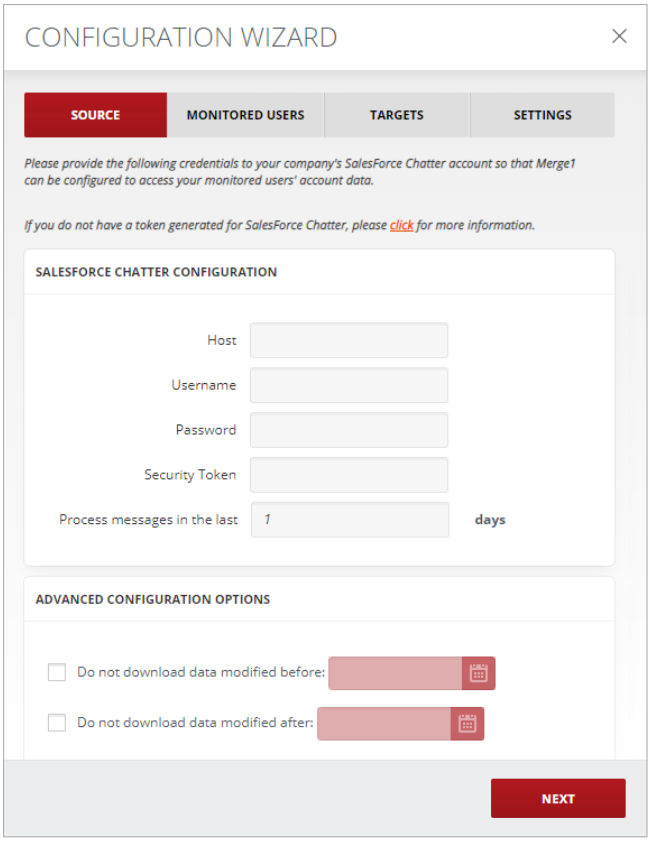
- Short Description - Private Group Id
- Name - Private_Group_Id
- Value - Insert Group Id of Private group.

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.



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.

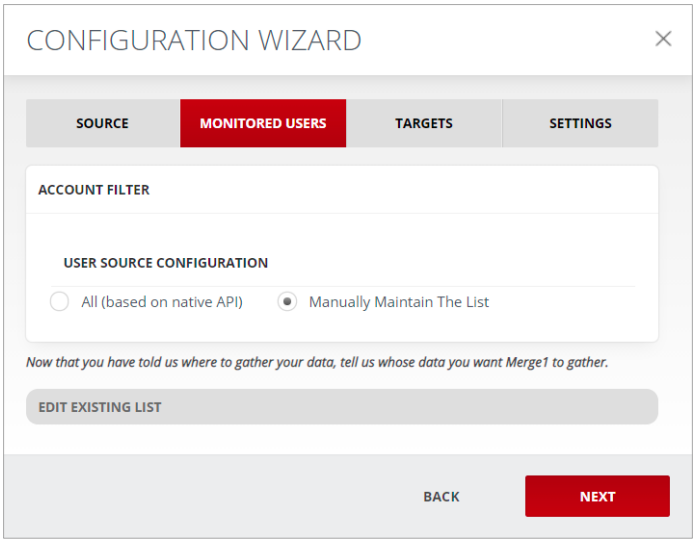
Monitored Users

Monitored Users are individuals whose data is collected by Merge1.

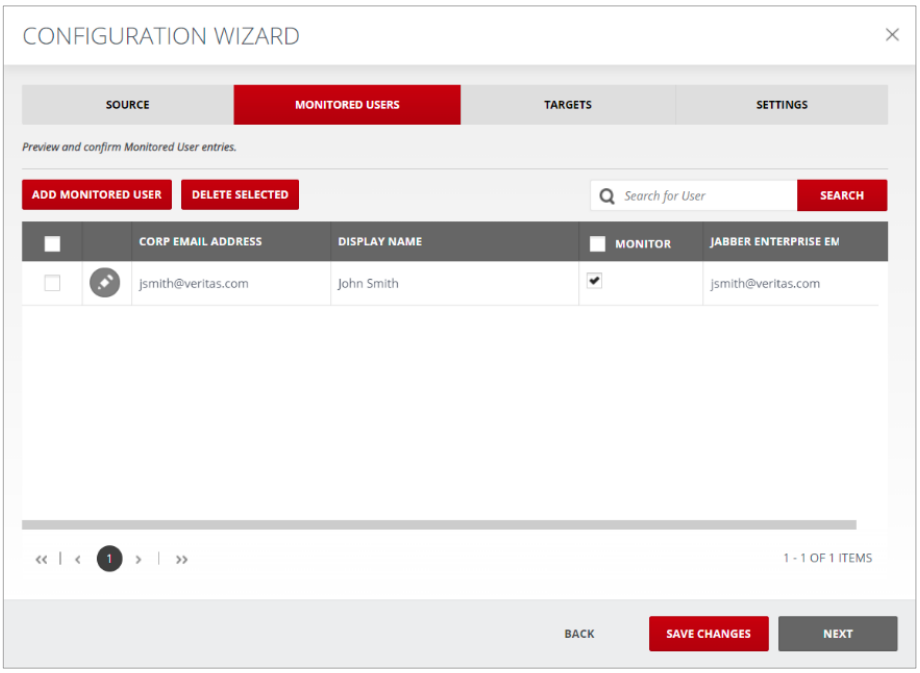
There are two User Sources from where Monitored Users can be added to the connector.

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

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



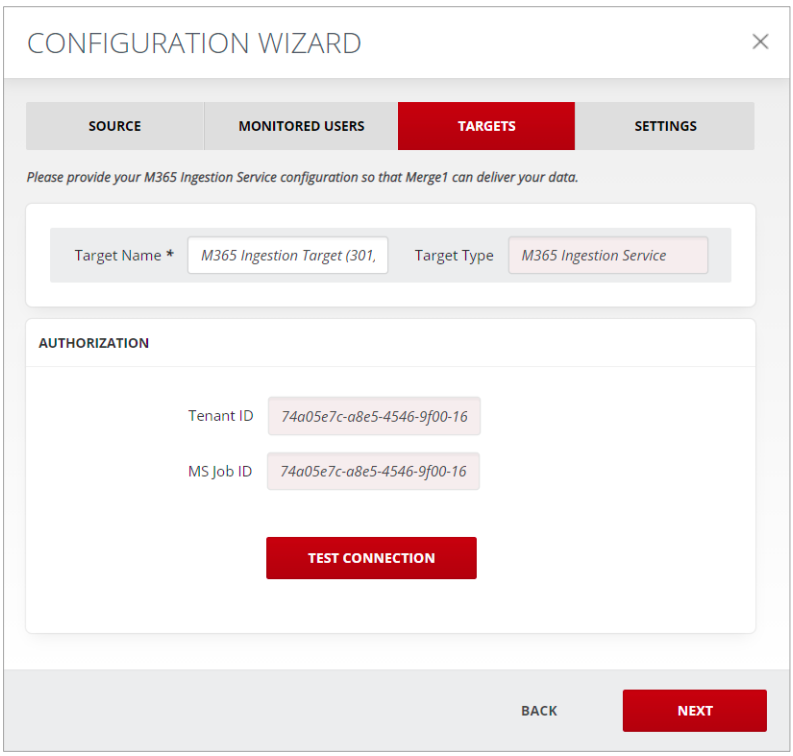
This will allow manually adding and managing users.



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.



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:

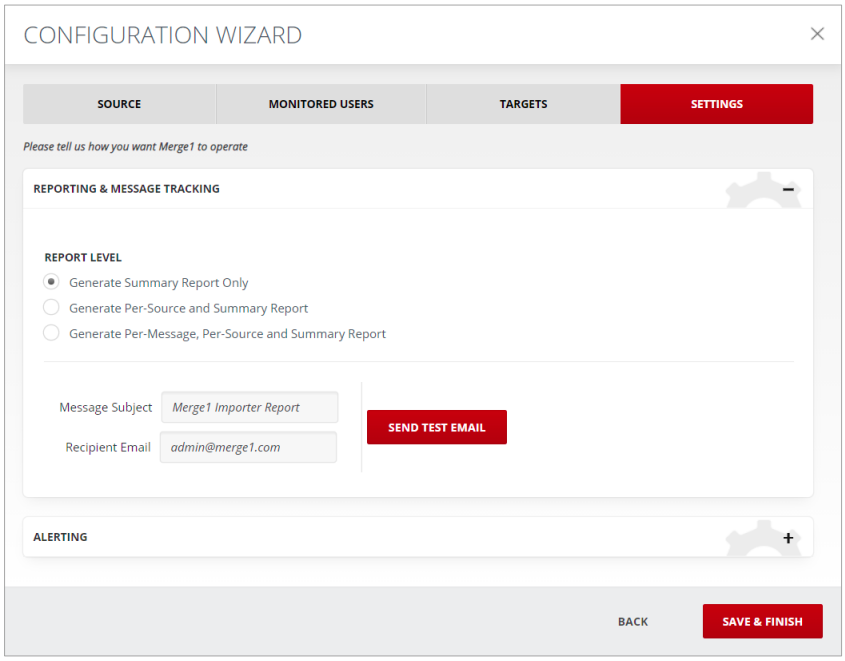
- Reporting & Message Tracking
- Alerting.

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.

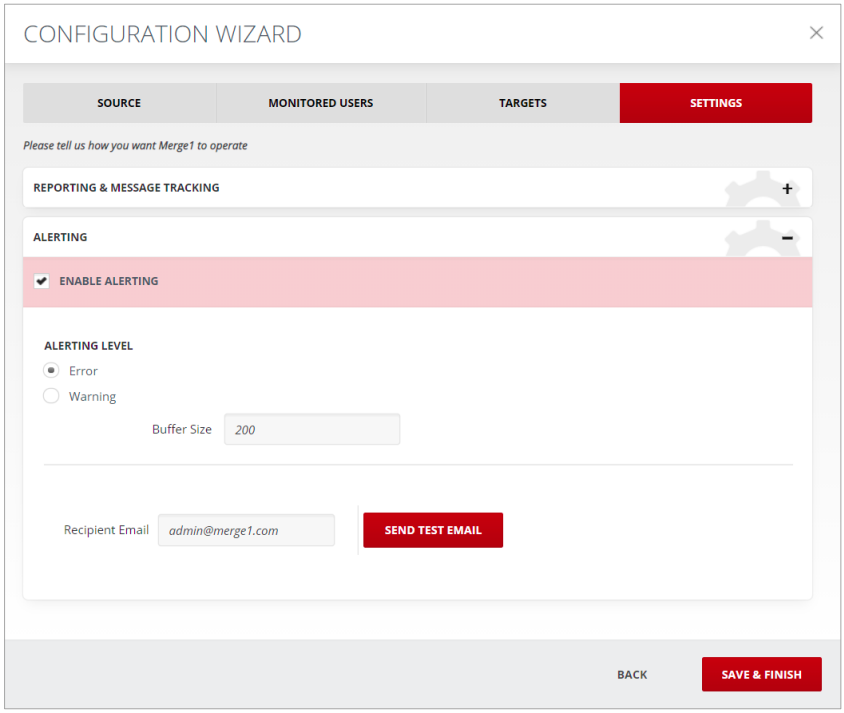
Reports are based on the activities that can be captured from the connectors.



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.

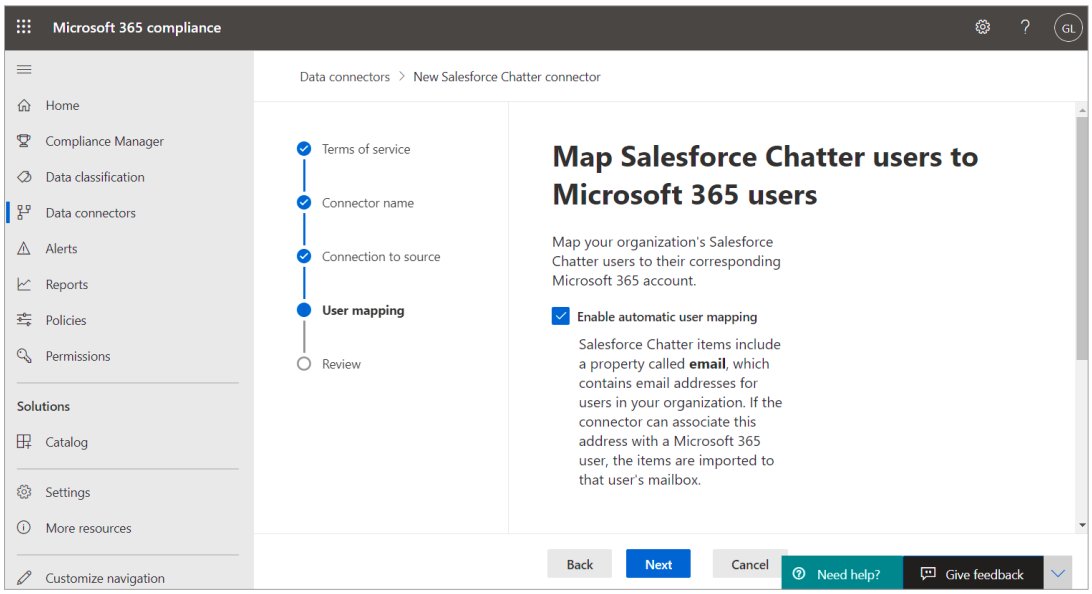
To configure the alerting, specify the **Buffer Size**.

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

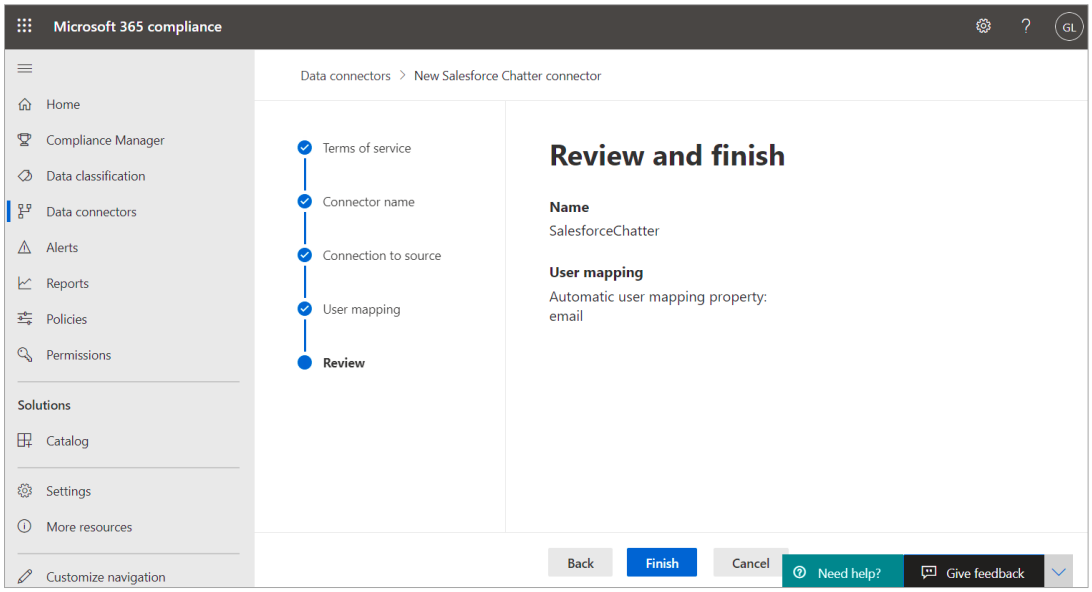
Provide the required user mapping.



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!