

VERITAS™

Third-Party Connectors

Webex Teams

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 Webex Teams 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 Webex Teams connector. Here you will need to contact [Veritas Customer Support](#). You will sign into this account when you create the connector.
- Create an application at <https://developer.webex.com/> to fetch data from Cisco Webex Teams via APIs for Compliance and eDiscovery purposes.

While creating the application, the Webex Teams platform generates a set of unique credentials. They will be used in the Webex Teams connector configuration wizard in Step 2 on the Microsoft site.

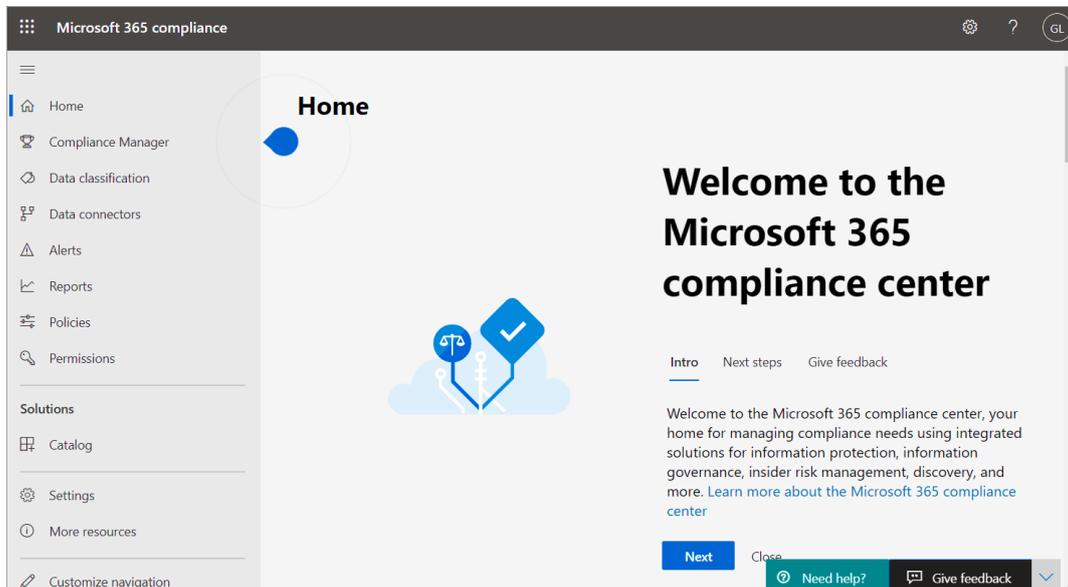
For step-by-step instructions on how to create the applications, see [Creating a Cisco Webex Teams Application](#).

- The user, who creates the Webex Teams 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”.

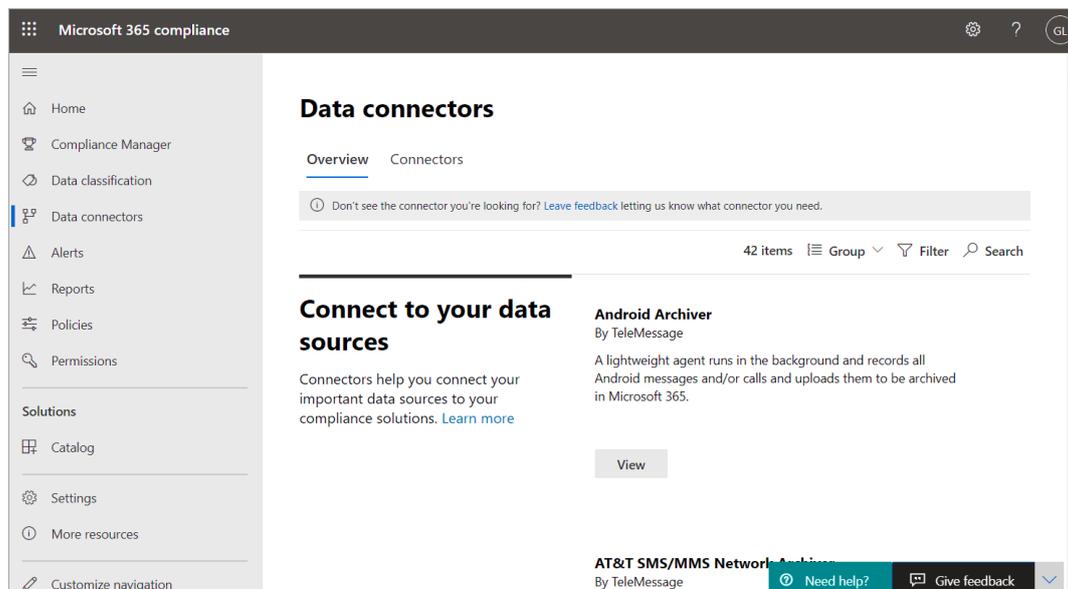
Accessing the Data Connectors

To access the Data Connectors, follow the steps below:

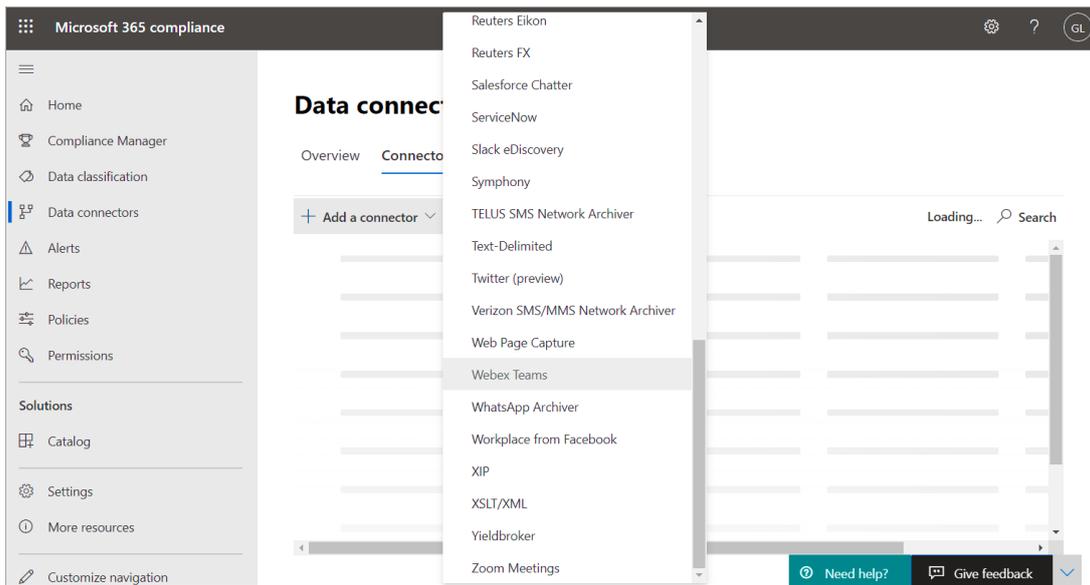
1. Go to <https://compliance.microsoft.com> web page.



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 **Webex Teams** from the list. For more details on how to set up the connector see [SETTING UP WEBEX TEAMS](#).



CHAPTER 2

Setting Up Webex Teams

This chapter represents:

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

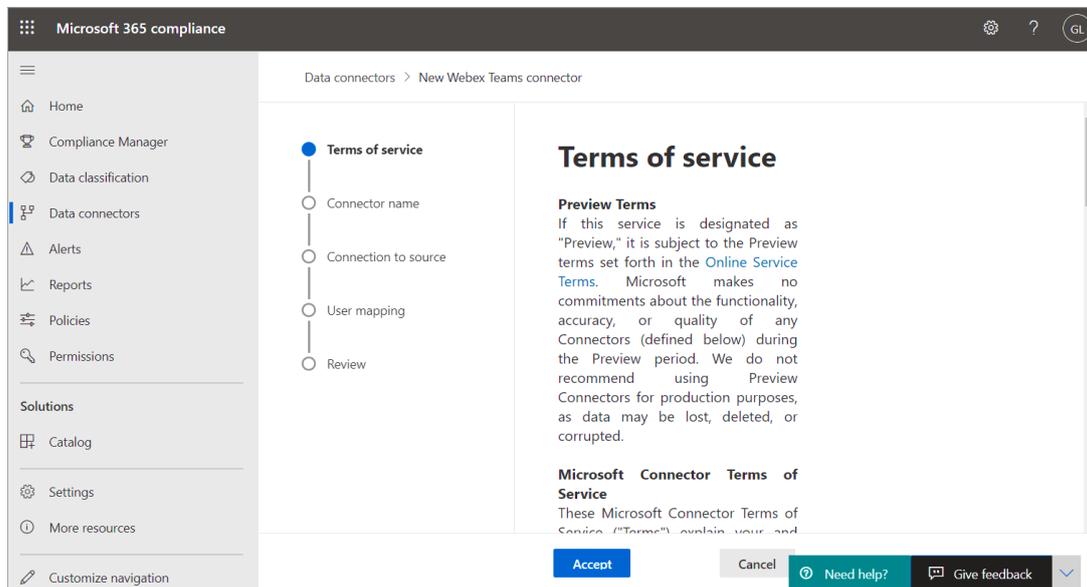
Overview

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

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

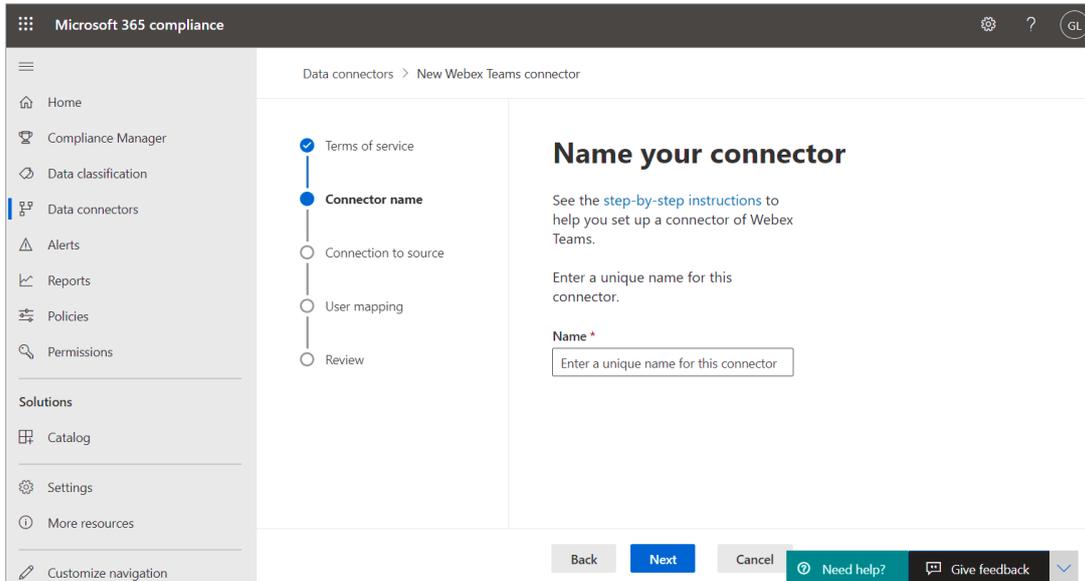
Terms of Service

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

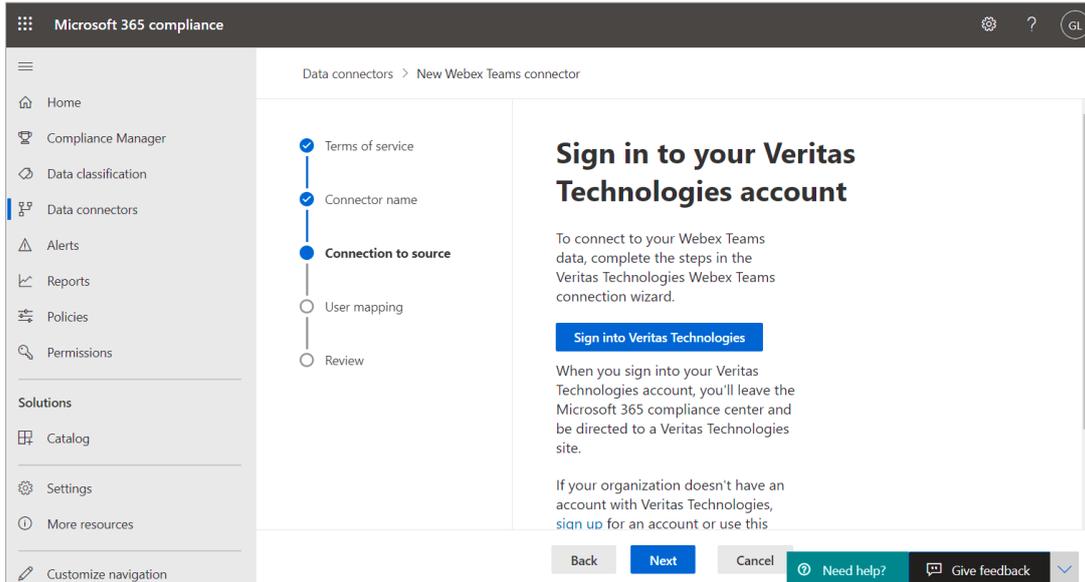


Connector Name

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



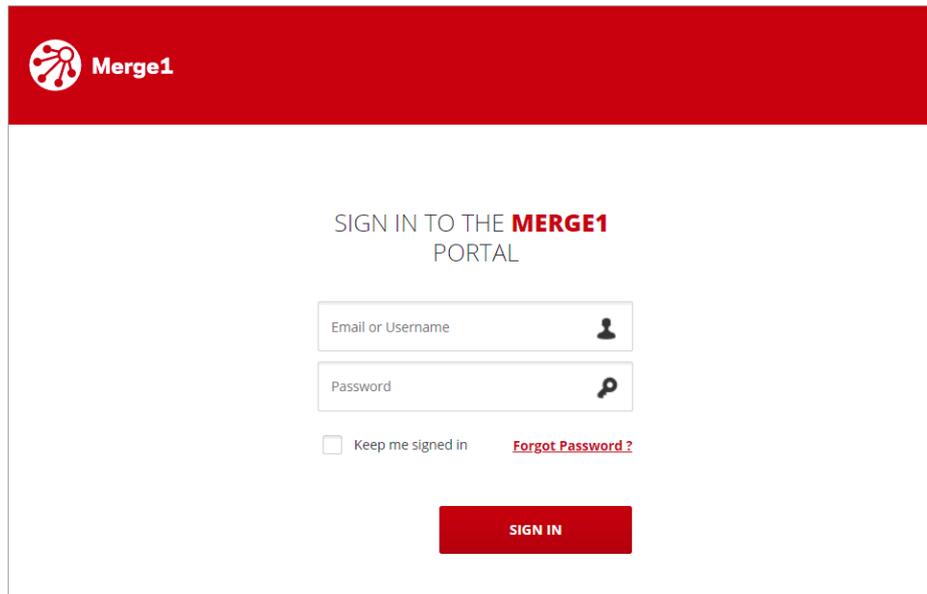
Click **Next**, to be navigated to the **Sign in to your Veritas Technologies account** page.



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 red link "Forgot Password?". At the bottom center is a red button labeled "SIGN IN".

Webex Teams 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.

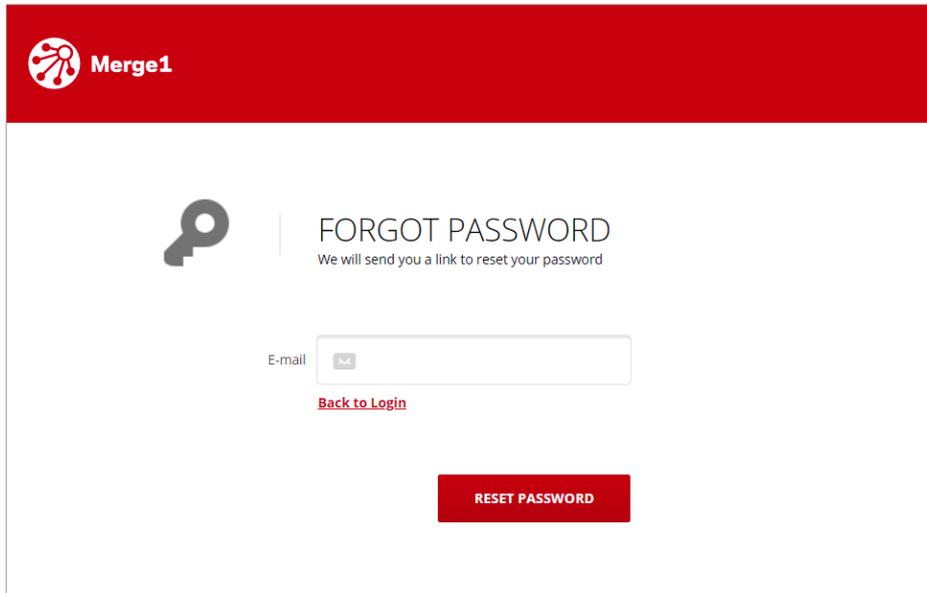
Password Recovery

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:

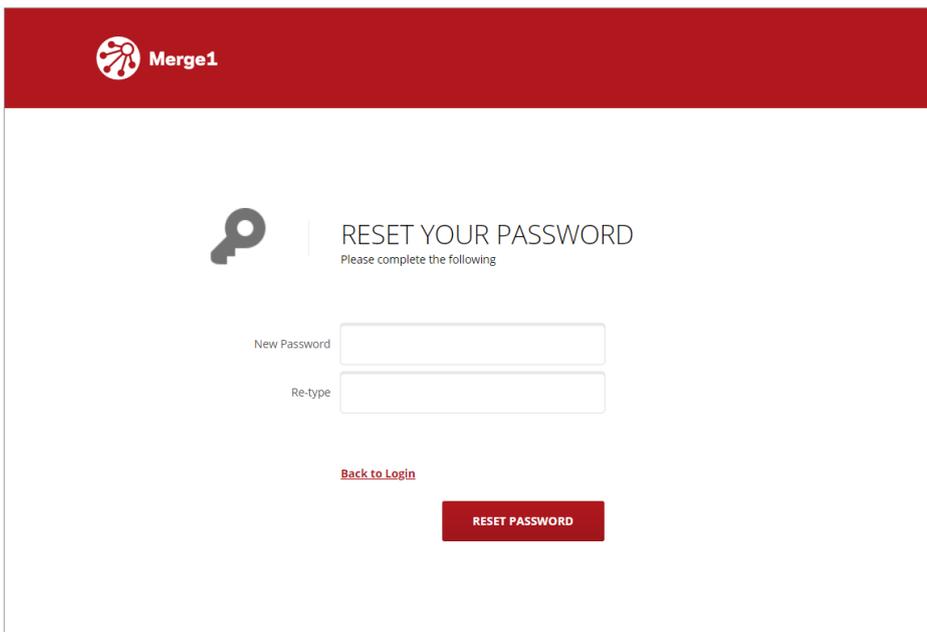
1. Click the **Forgot Password** link in the **Sign in** window.

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 a sub-heading 'We will send you a link to reset your password'. Below this is an 'E-mail' input field with an envelope icon. A red link '[Back to Login](#)' is positioned below the input field. 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 a sub-heading 'Please complete the following'. Below this are two input fields: 'New Password' and 'Re-type'. A red link '[Back to Login](#)' is positioned below the input fields. 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 "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 "Required Field" label is present above the form. Below the form, there is a "Connector Types" section 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."

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 Webex Teams from the Merge1 product.

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



CHAPTER 3

Configuring the Webex Teams Connector

This chapter represents:

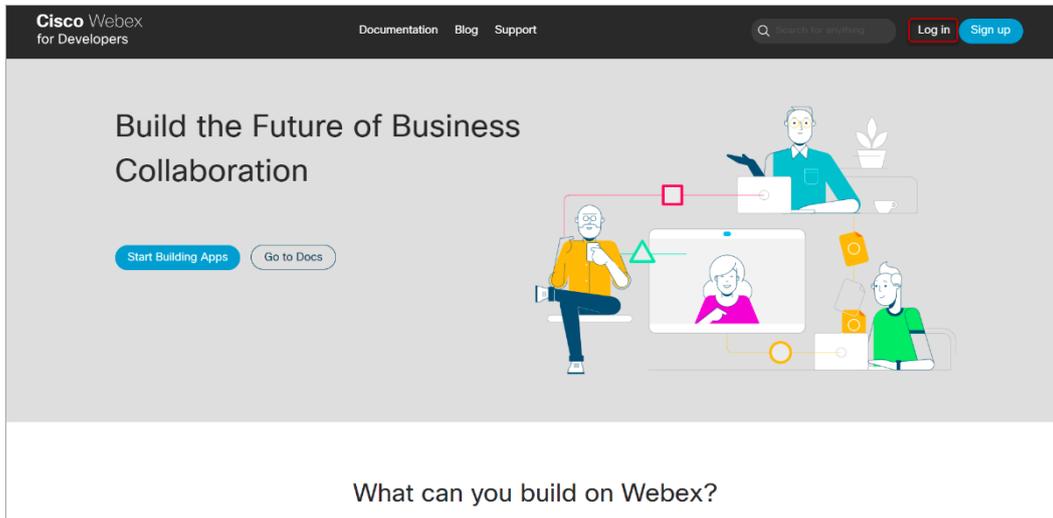
- Creating a Cisco Webex Teams Application
- Configuring the Webex Teams Connector
- Monitored Users
- Targets
- Settings
- User Mapping
- Review

Creating a Cisco Webex Teams Application

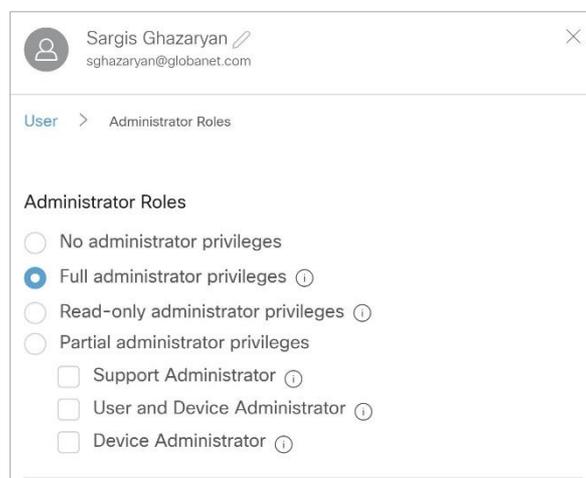
Webex Teams allows third parties to fetch data from its APIs for Compliance and eDiscovery purposes, this is achieved by using Custom Integrations.

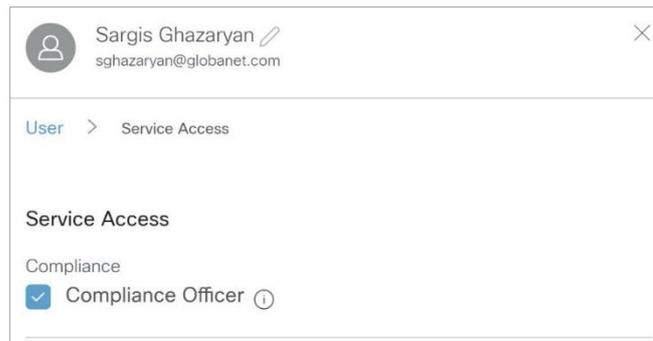
To create an app, follow the steps below:

1. Go to <https://developer.webex.com/> and log into your account.

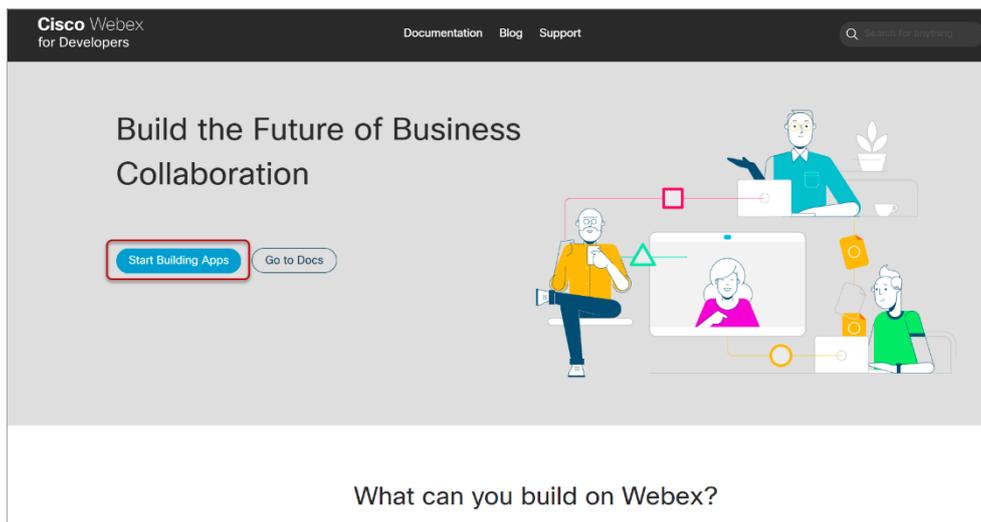


Note that the account should have Full Administrative Privileges and be a Compliance Officer. Permission for full administrator privileges can be checked at <https://admin.webe.g.com/users> > **Select User > Administrative Roles** and for compliance <https://admin.webe.g.com/users> > **Select User > Service Access**:

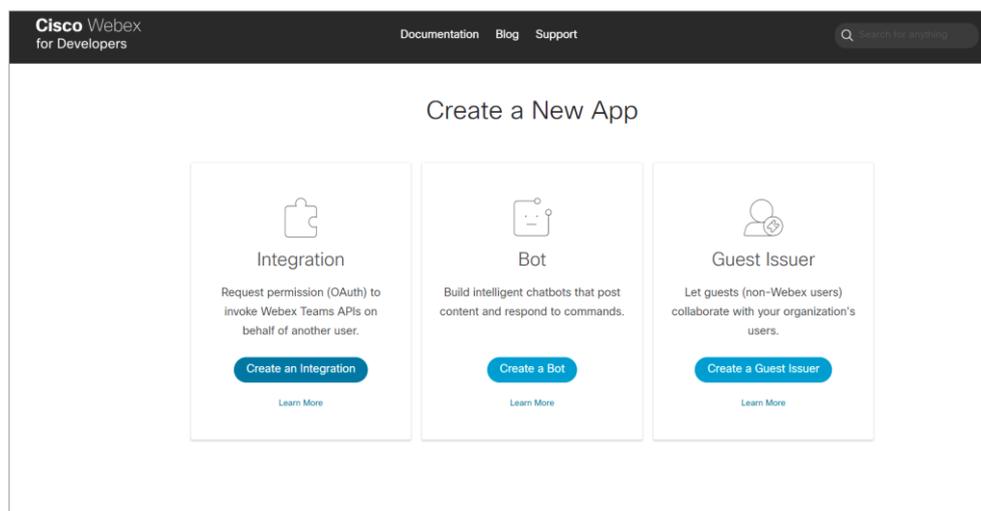




2. When logged in and permissions are set, click **Start Building Apps**.

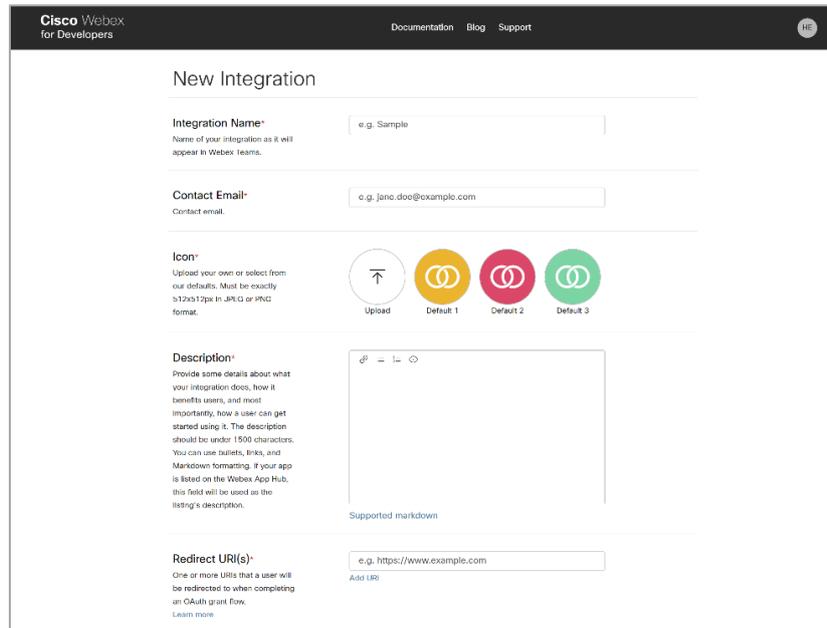


3. Choose **Create an Integration**.



4. Fill in the **Integration Name, Contact Email, Icon, Description** fields.

5. In the Redirect URI(s) field add `https://<your_merge1_domain>/Configuration/OAuthCallback` URL address.



The screenshot shows the 'New Integration' form in the Cisco Webex for Developers portal. The form includes the following fields and options:

- Integration Name:** A text input field with the placeholder 'e.g. Sample'. Below it, a note states: 'Name of your integration as it will appear in Webex teams.'
- Contact Email:** A text input field with the placeholder 'e.g. jane.doe@example.com'. Below it, a note states: 'Contact email.'
- Icon:** A section with the instruction: 'Upload your own or select from our defaults. Must be exactly 32x32px in .PNG or .JPG format.' It features four circular icons: 'Upload' (with an upward arrow), 'Default 1' (yellow with a white 'O'), 'Default 2' (red with a white 'O'), and 'Default 3' (green with a white 'O').
- Description:** A rich text editor area with the instruction: 'Provide some details about what your integration does, how it benefits users, and most importantly, how a user can get started using it. The description should be under 1500 characters. You can use bullets, links, and Markdown formatting. If your app is listed on the Webex App Hub, this field will be used as the listing's description.' Below the editor, it says 'Supported markdown'.
- Redirect URI(s):** A text input field with the placeholder 'e.g. https://www.example.com'. Below it, a note states: 'One or more URIs that a user will be redirected to when completing an OAuth grant flow. Learn more'.

6. Select the following scopes:

<input checked="" type="checkbox"/>	spark:all Full access to your Webex Teams account
<input type="checkbox"/>	spark:memberships_read List people in the rooms you are in
<input type="checkbox"/>	spark:memberships_write Invite people to rooms on your behalf
<input type="checkbox"/>	spark:messages_read Read the content of rooms that you are in
<input type="checkbox"/>	spark:messages_write Post and delete messages on your behalf
<input type="checkbox"/>	spark:people_read Read your users' company directory
<input type="checkbox"/>	spark:rooms_read List the titles of rooms that you are in
<input type="checkbox"/>	spark:rooms_write Manage rooms on your behalf
<input type="checkbox"/>	spark:team_memberships_read List the people in the teams your user belongs to
<input type="checkbox"/>	spark:team_memberships_write Add people to teams on your users' behalf
<input type="checkbox"/>	spark:teams_read List the teams your user's a member of
<input type="checkbox"/>	spark:teams_write Create teams on your users' behalf
<input checked="" type="checkbox"/>	spark-admin:licenses_read Access to read licenses available in your user's organizations
<input checked="" type="checkbox"/>	spark-admin:organizations_read Access to read your user's organizations
<input checked="" type="checkbox"/>	spark-admin:people_read Access to read your user's company directory
<input type="checkbox"/>	spark-admin:people_write Access to write to your user's company directory
<input type="checkbox"/>	spark-admin:resource_group_memberships_read Access to read your organization's resource group memberships
<input type="checkbox"/>	spark-admin:resource_group_memberships_write Access to update your organization's resource group memberships
<input type="checkbox"/>	spark-admin:resource_groups_read Access to read your organization's resource groups
<input checked="" type="checkbox"/>	spark-admin:roles_read Access to read roles available in your user's organization
<input checked="" type="checkbox"/>	spark-compliance:events_read Access to read events in your user's organization
<input checked="" type="checkbox"/>	spark-compliance:memberships_read Access to read memberships in your user's organization
<input type="checkbox"/>	spark-compliance:memberships_write Access to create/update/delete memberships in your user's organization
<input checked="" type="checkbox"/>	spark-compliance:messages_read Access to read messages in your user's organization
<input type="checkbox"/>	spark-compliance:messages_write Post and delete messages in all spaces in your user's organization
<input checked="" type="checkbox"/>	spark-compliance:rooms_read Access to read rooms in your user's organization
<input checked="" type="checkbox"/>	spark-compliance:team_memberships_read Access to read team memberships in your user's organization
<input type="checkbox"/>	spark-compliance:team_memberships_write Access to update team memberships in your user's organization
<input checked="" type="checkbox"/>	spark-compliance:teams_read Access to read teams in your user's organization

- spark:all
- spark-admin:license_read
- spark-admin:organizations_read
- spark-admin:people_read
- spark-admin:roles_read
- spark-compliance:events_read
- spark-compliance:memberships_read
- spark-compliance:messages_read
- spark-compliance:rooms_readspark-compliance:team_memberships_read
- spark-compliance:teams_read

7. Click **Add Integration** at the bottom of the page.

8. Copy the **Client ID** and **Client Secret** and save it in a secure location.

Configuring the Webex Teams Connector

1. Add the **Client ID** into **Application ID** field.
2. Fill in **Application Secret/Key** with the **Client Secret**.
3. Click **Next**.

CONFIGURATION WIZARD

SOURCE MONITORED USERS TARGETS SETTINGS

Please provide the following credentials to your company's Cisco Webex Teams app so that Merge1 can be configured to access your monitored users' account data.

If you do not have an app created for Cisco Webex Teams, please [click](#) for more information.

CISCO WEBEX TEAMS APPLICATION CONFIGURATION

Application ID

Application Secret/Key

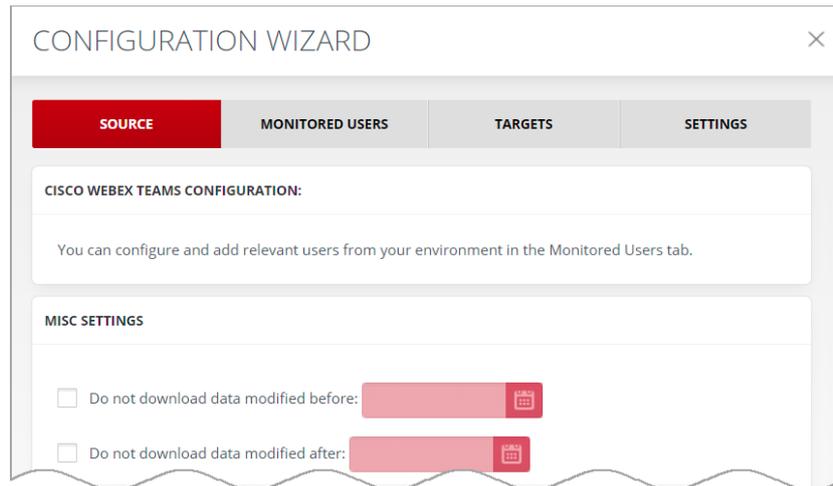
I have Access Token

NEXT

Miscellaneous Settings

For Misc Settings:

- Options, **Do not download data modified before** and **Do not download data modified after**, 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.



Part 1

Attachments Configuration

For Attachments Configuration:

- When **Do not download files greater than X megabyte(s)** is selected, the files bigger than the filled-in number of megabytes, are not downloaded. In the **Custom Message** field, a text for those excluded files 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. The vertical bar is used to separate the file types

The image shows two configuration screens for the Webex Teams Connector. The top screen is titled "ATTACHMENTS CONFIGURATION" and contains two sections. The first section has a checkbox labeled "Do not download files greater than" followed by a text input field containing "1" and the text "megabyte(s)". Below this is a "Custom message" label and a large text area containing "This message will be added to the email body." and 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." The second section has a "File types" label and a text input field, followed by another "Custom message" label and a large text area with "This message will be added to the email body." and 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." The bottom screen is titled "SPLITTING MESSAGES" and has a checkbox labeled "Split messages". Below it is a text input field containing "0" followed by "(MB) Max Size for each part of splitted message" and the text "Split size must be an integer". At the bottom right of the form are two buttons: "BACK" and "NEXT".

Part 2

Splitting Messages

Check the **Split messages** box in case you want to split big files into smaller files. The size of a split part of the message can be specified so that each part does not exceed the set size. For example, if the **Max Size** for each part of split message is set to 25MB, and the original message is 65 MB, it will be split into 3 messages, each not exceeding 25MB.

i Important: In case you have a limitation of 25 MB on your server, you must split your message max to 17MB as the server also must have space for some encryption and decryption tasks that are being carried out by Merge1.

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 the 'CONFIGURATION WIZARD' window with the 'MONITORED USERS' tab selected. The 'ACCOUNT FILTER' field is empty. Under 'USER SOURCE CONFIGURATION', the radio button for 'Manually Maintain The List' is selected. Below this, there is a button labeled 'EDIT EXISTING LIST'. 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 'Preview and confirm Monitored User entries.' section is visible. It includes buttons for 'ADD MONITORED USER' and 'DELETE SELECTED', a search bar with 'Search for User' and a 'SEARCH' button. Below is a table with columns: 'CORP EMAIL ADDRESS', 'DISPLAY NAME', 'MONITOR', and 'JABBER ENTERPRISE EM'. One user entry is shown: 'jsmith@veritas.com', 'John Smith', with a checked 'MONITOR' checkbox and 'jsmith@veritas.com' in the 'JABBER ENTERPRISE EM' column. 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.

The screenshot shows a 'CONFIGURATION WIZARD' window with a close button (X) in the top right. Below the title bar are four tabs: 'SOURCE', 'MONITORED USERS', 'TARGETS' (which is highlighted in red), and 'SETTINGS'. A message reads: 'Please provide your M365 Ingestion Service configuration so that Merge1 can deliver your data.' Below this is a form with two fields: 'Target Name *' with the value 'M365 Ingestion Target (301)' and 'Target Type' with the value 'M365 Ingestion Service'. Underneath is an 'AUTHORIZATION' section with two fields: 'Tenant ID' and 'MS Job ID', both with the value '74a05e7c-a8e5-4546-9f00-16'. A red 'TEST CONNECTION' button is centered below these fields. At the bottom right of the wizard 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.

- 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 two buttons: 'BACK' and 'SAVE & FINISH' (highlighted in red).

- 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 the 'CONFIGURATION WIZARD' interface with a navigation bar containing 'SOURCE', 'MONITORED USERS', 'TARGETS', and 'SETTINGS'. The 'SETTINGS' tab is active. Below the navigation bar, there is a section for 'REPORTING & MESSAGE TRACKING' and an 'ALERTING' section. The 'ALERTING' section is expanded, showing a red bar with a checkmark and the text 'ENABLE ALERTING'. Below this, there is an 'ALERTING LEVEL' section with two radio buttons: 'Error' (selected) and 'Warning'. A 'Buffer Size' input field is set to '200'. At the bottom of the alerting 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 '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.

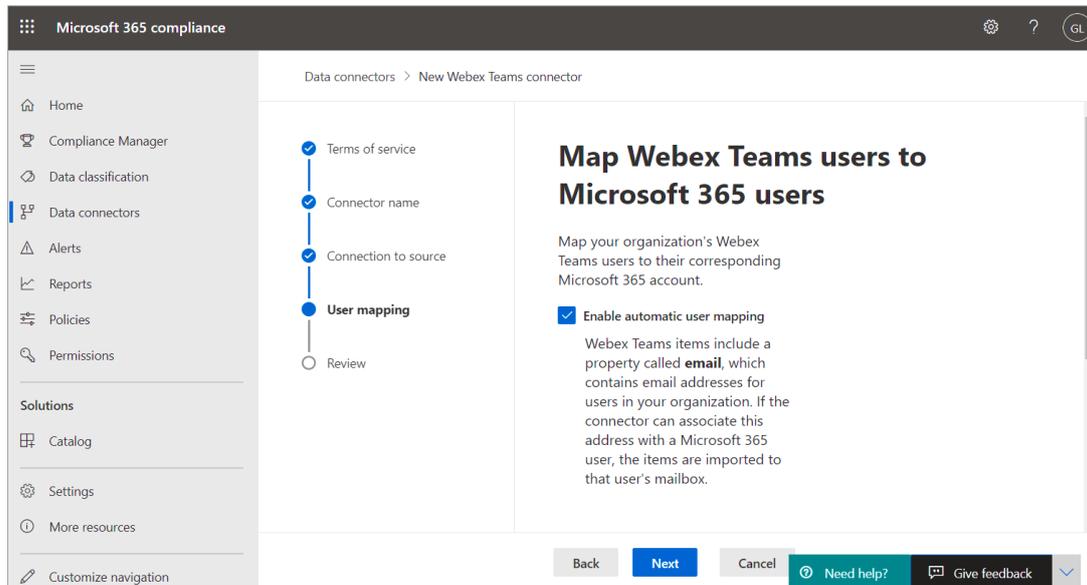
To configure the alerting, specify the **Buffer Size**.

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

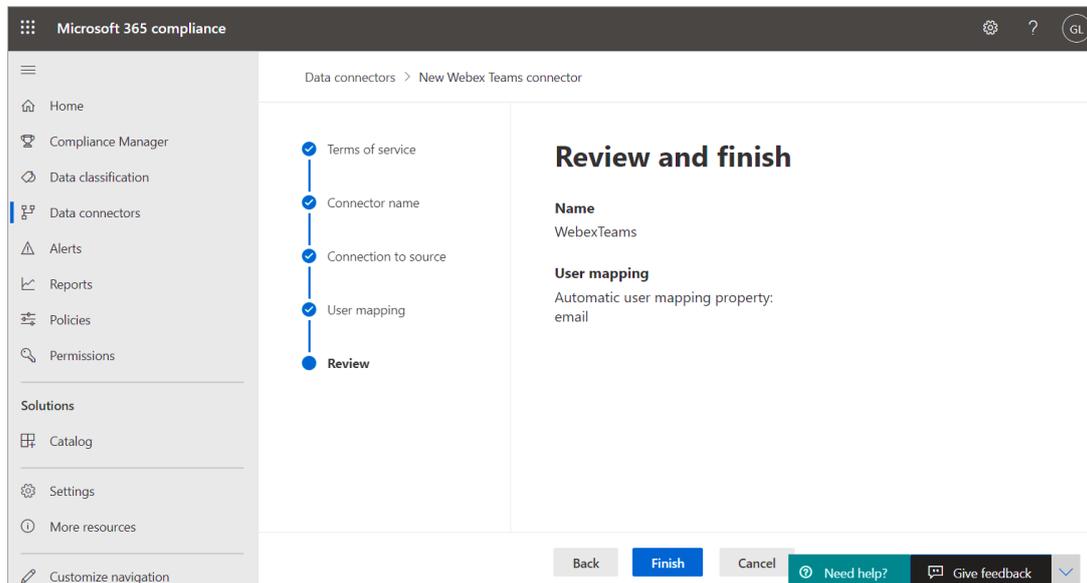
Provide the required user mapping.



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!

