VERITAS™

Third-Party Connectors

Zoom Meetings

User Guide

MERGE1

LEGAL NOTICE

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CONTENTS

CHAPTER 1

Introduction

This chapter represents:

- Overview
- Pre-Requisites
- Accessing the Data Connectors

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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 Zoom Meetings data are external to Microsoft 365 and must be completed before you can create the connector in the compliance center.

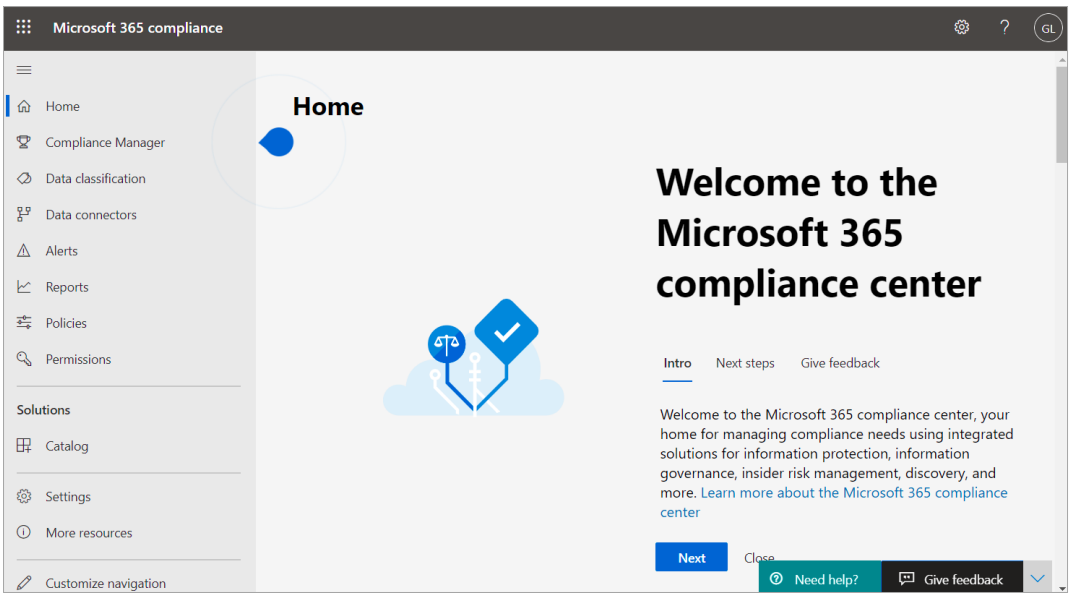
- Create a Merge1 account by accepting their terms and conditions for Zoom Meetings connector. Here you will need to contact Veritas Customer Support. You will sign into this account when you create the connector.
- Create the following applications:
  - OAuth Application
  - JWT Application.

  For step-by-step instructions on how to create the applications, see *Creating an OAuth Application* and *Creating a JWT Application*.
- The user, who creates the Zoom Meetings 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".

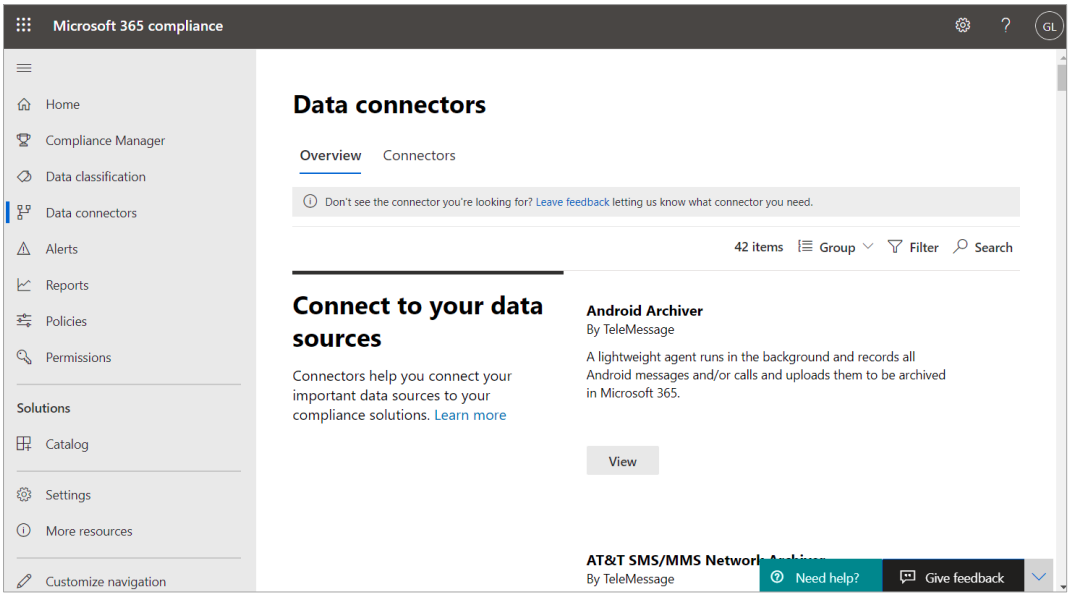
Accessing the Data Connectors

To access the Data Connectors, follow the steps below:

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

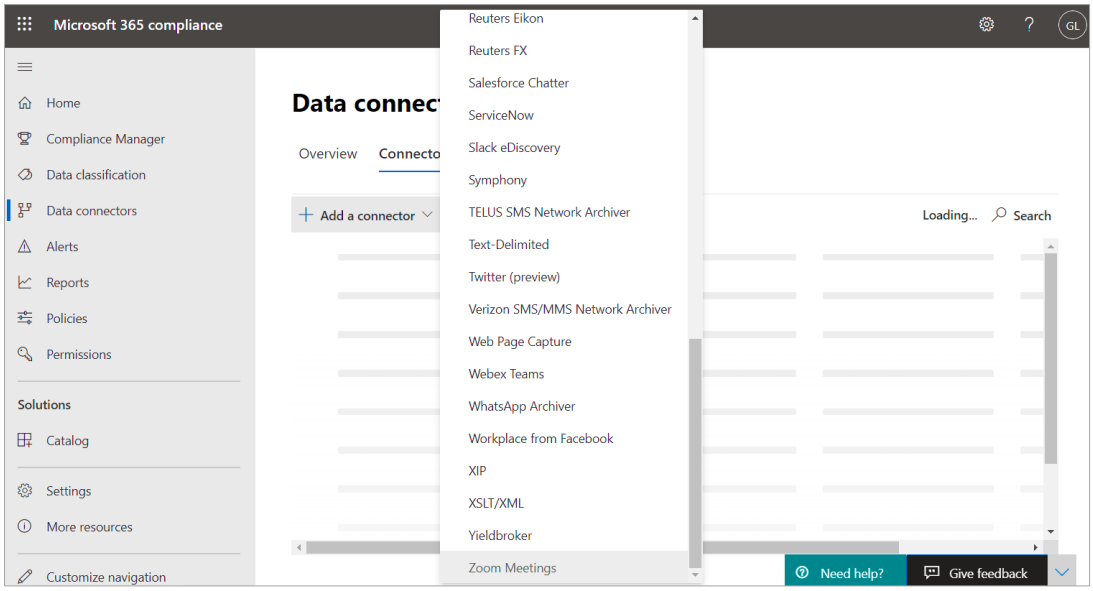


2. Navigate to **Data Connectors**. You will be presented with the **Overview** section of the Data Connectors.



3. Go to the **Connectors** tab.

4. Click the **Add new connector** button. A pop-up list of connectors will open.



5. Select the **Zoom Meetings** from the list. For more details on how to set up the connector see *SETTING UP ZOOM MEETINGS*.

CHAPTER 2

Setting Up Zoom Meetings

This chapter represents:

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

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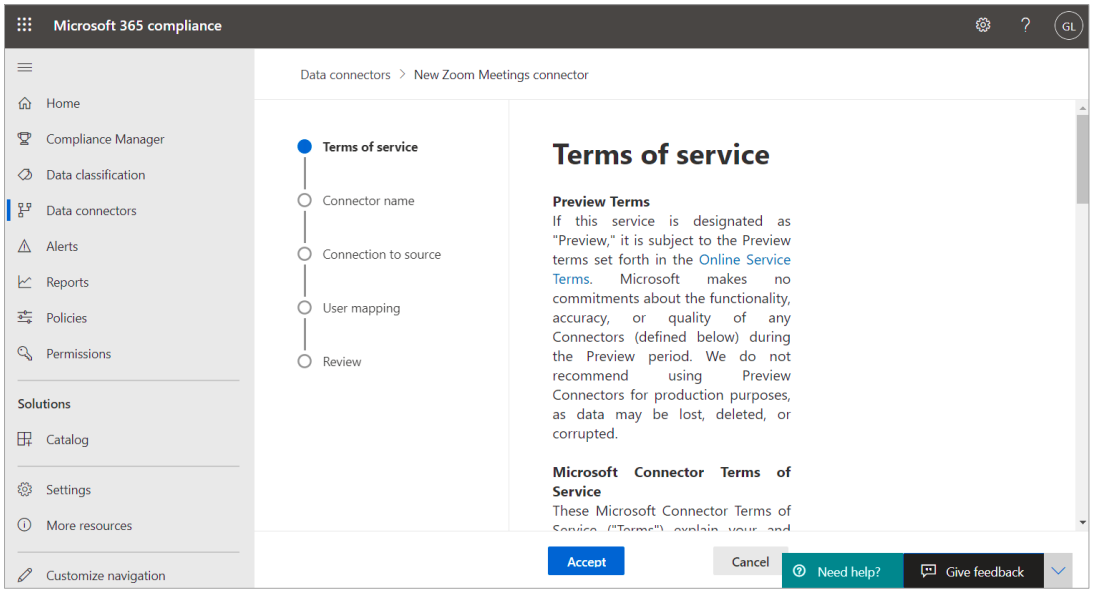
Overview

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

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

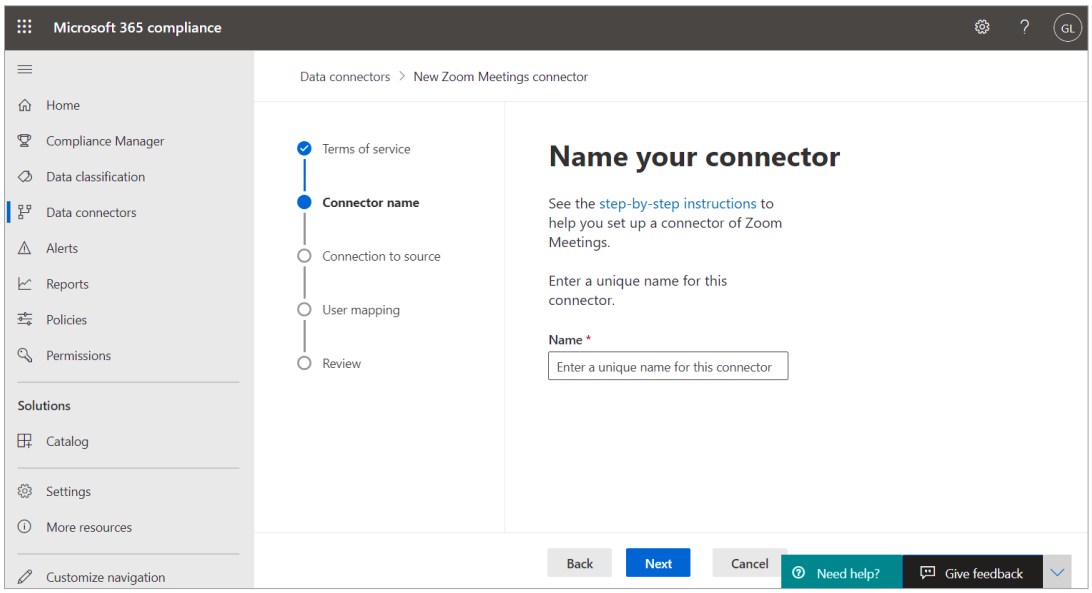
Terms of Service

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

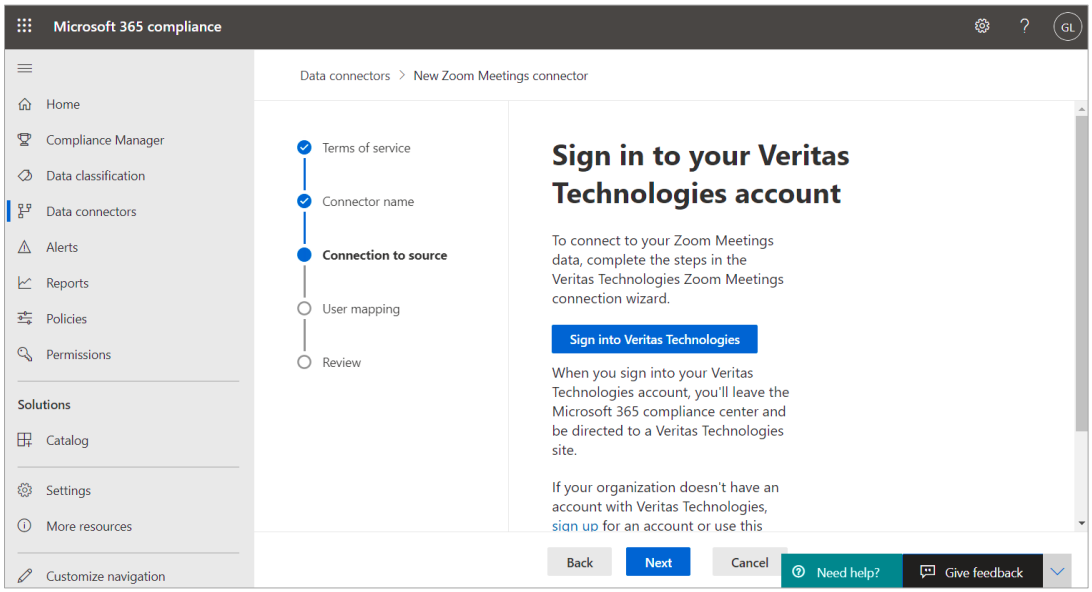


Connector Name

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



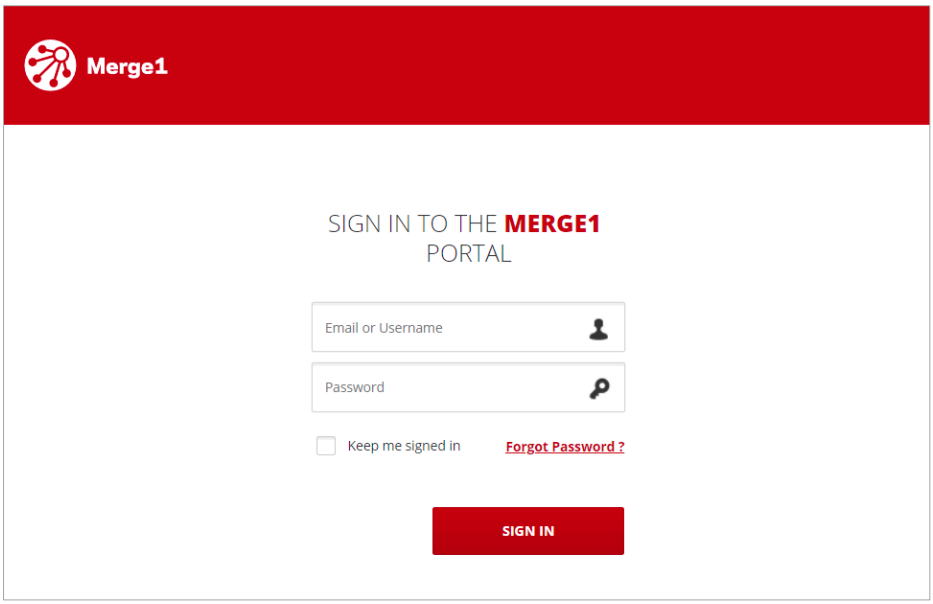
Click **Next**, to be navigated to the **Sign in to your Veritas Technologies account** page.



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.



Zoom Meetings 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.

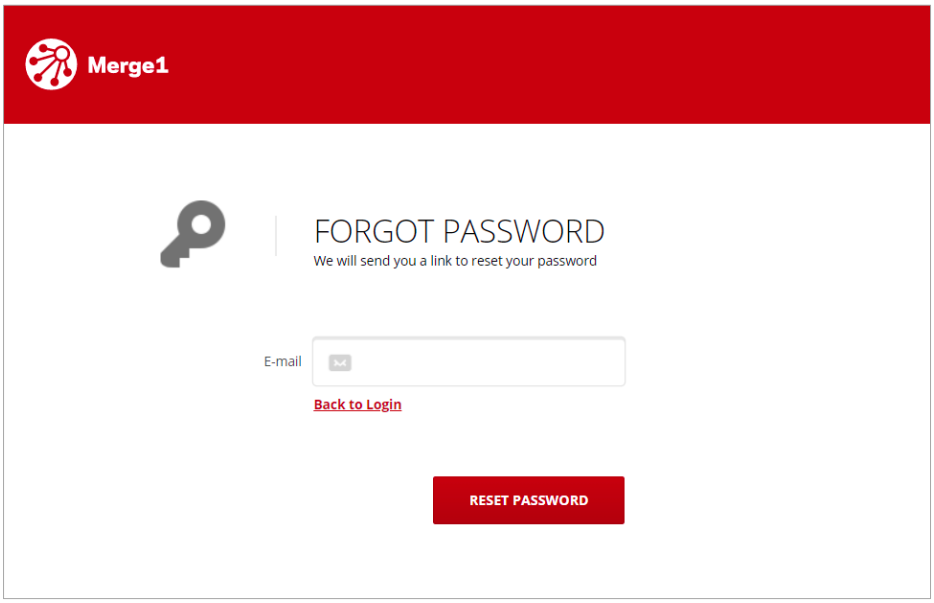
Password Recovery

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:

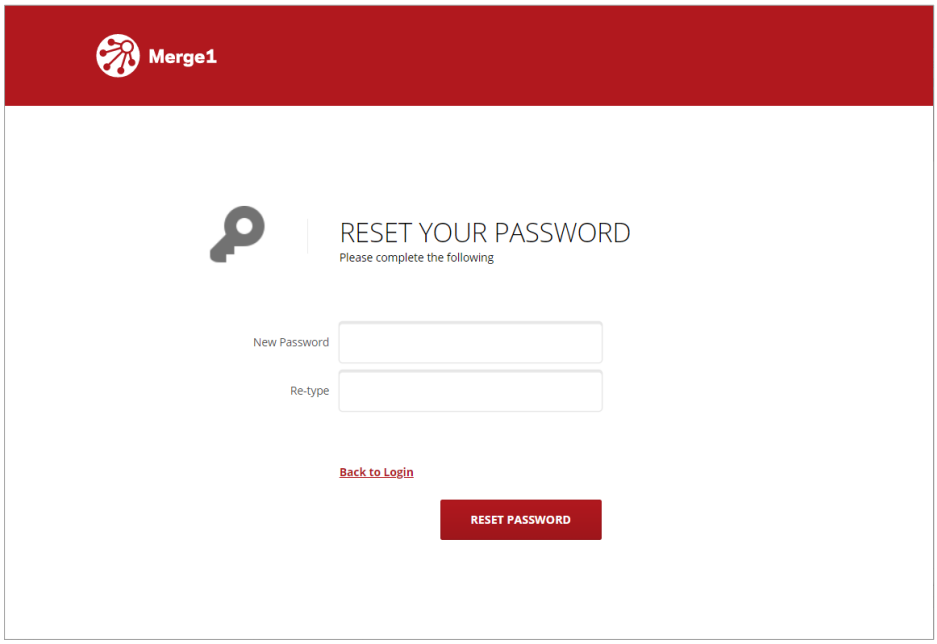
1. Click the **Forgot Password** link in the **Sign in** window.

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.

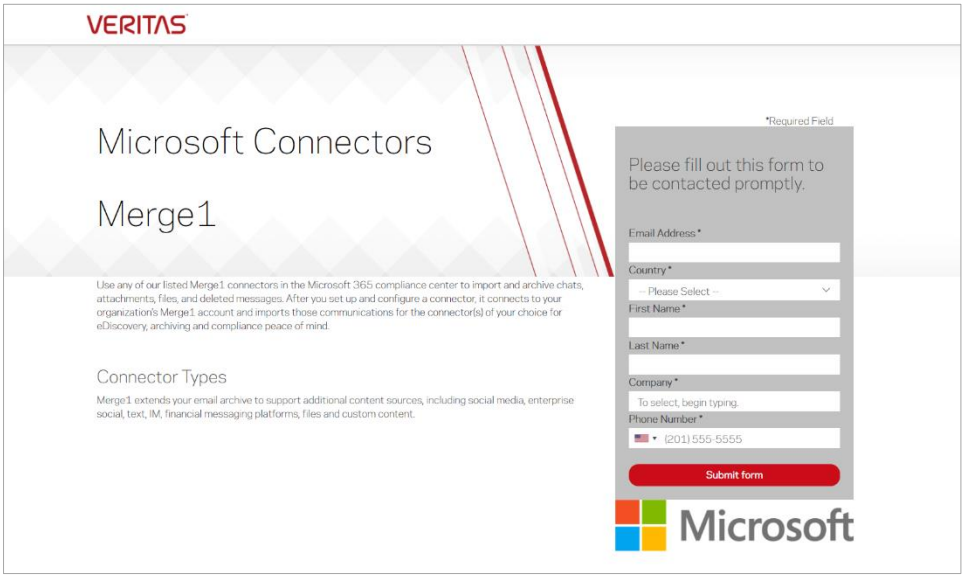
4. Provide a new password and re-enter it for verification.



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 Zoom Meetings from the Merge1 product.

Now, when you are redirected to the Veritas Merge1 page, you can start configuring the Zoom Meetings connector. For more details on how to configure the connector, see *CONFIGURING THE ZOOM MEETINGS CONNECTOR*.

CHAPTER 3

Configuring the Zoom Meetings Connector

This chapter represents:

- Overview
- Creating an OAuth Application
- Creating a JWT Application
- Connector Configuration
- Monitored Users
- Targets
- Settings
- User Mapping
- Review

Creating Applications

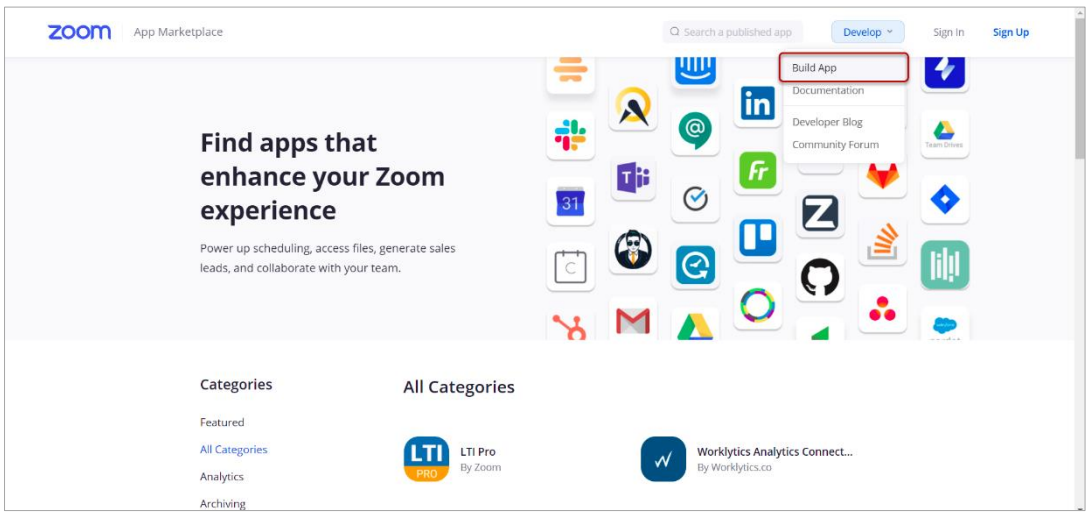
The Zoom Meetings connector requires 2 kinds of applications:

- OAuth Application
- JWT Application

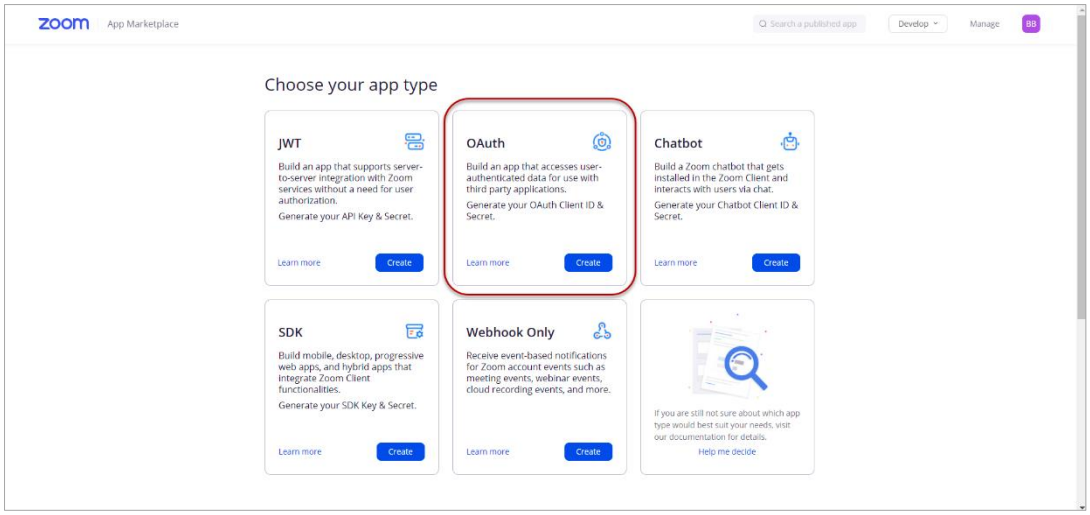
Creating an OAuth Application

To create an oAuth application, follow the steps below:

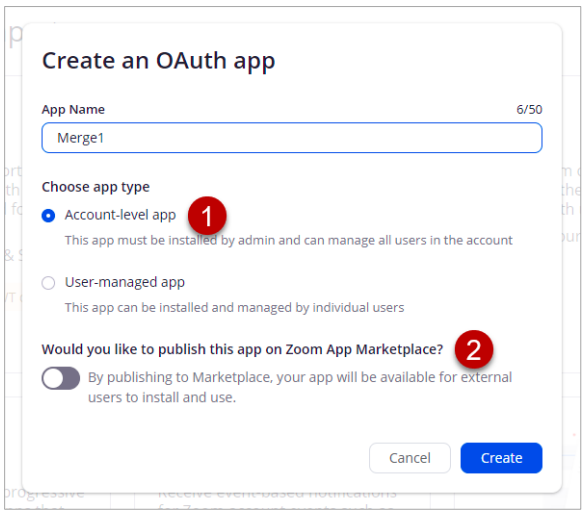
1. Go to Zoom Marketplace: https://marketplace.zoom.us/.
2. Select **Develop > Build App**.



3. Sign in if prompted to.
4. Choose the **OAuth** application type.

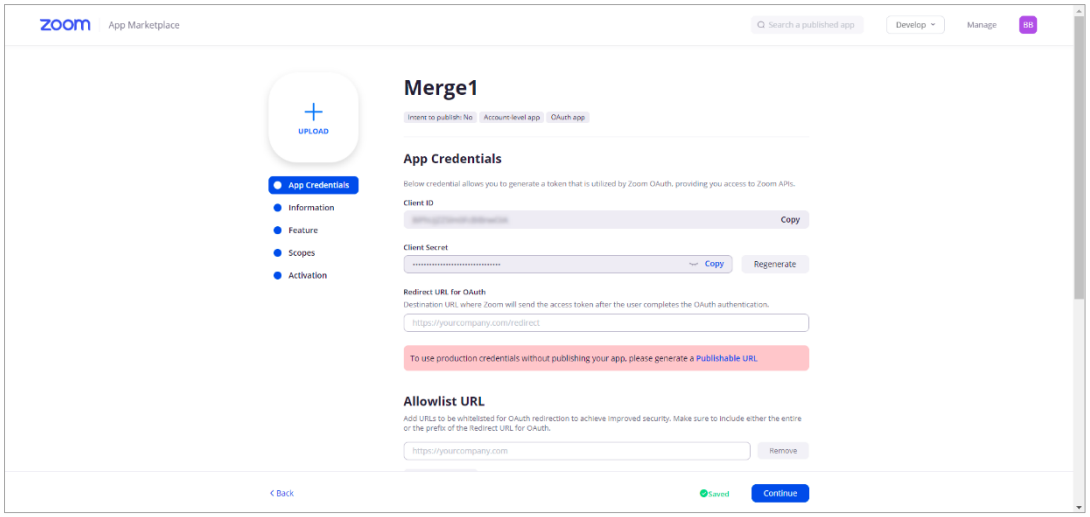


5. Give an app name, choose **Account-level app**, disable publishing to Marketplace and click **Create**.



6. Copy the **Client ID** and the **Client Secret**. They will be used later to configure the Merge1 Zoom connector.

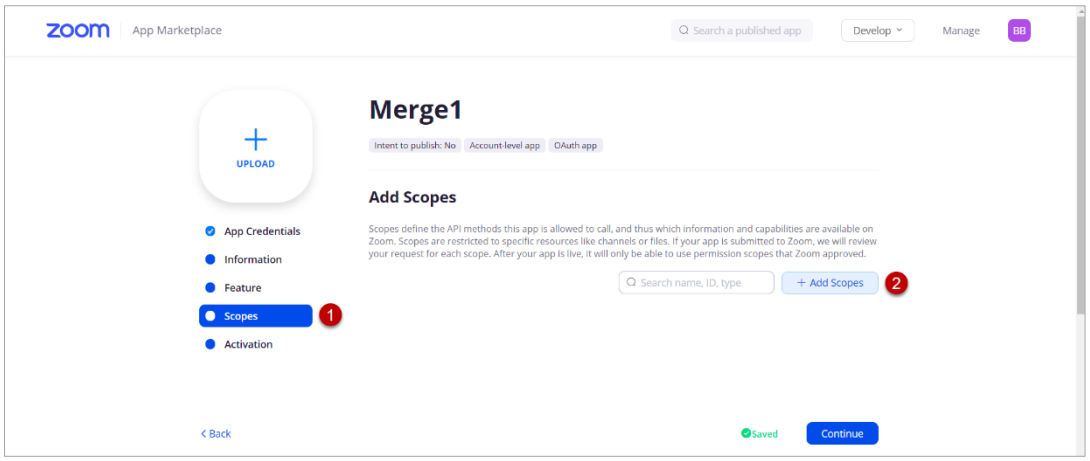
7. Under **Redirect URL for OAuth** and **Allow List URL**, enter the URL of your local Merge1 environment with the following extension: `/Configuration/OAuthCallback`. Click **Continue**.



8. In the Information section fill in the following information:

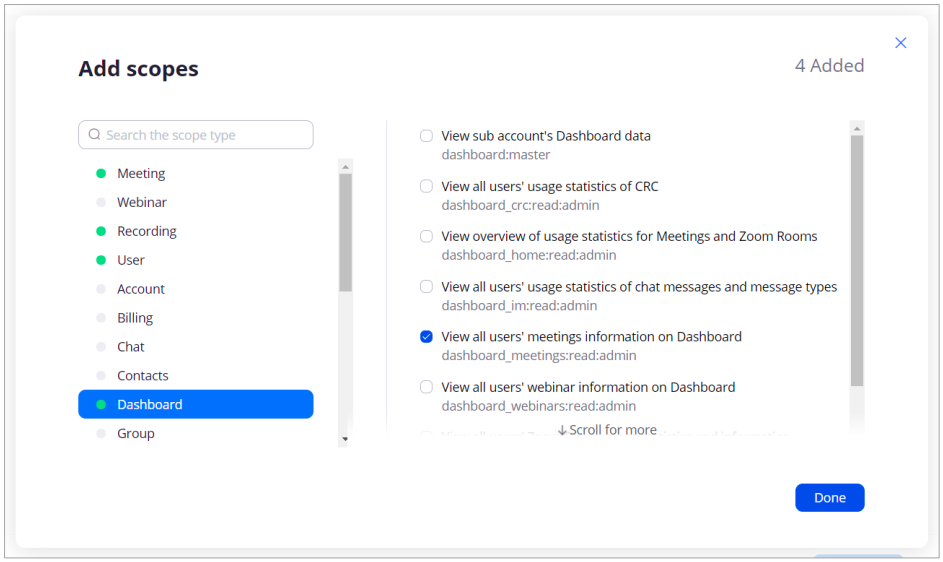
- Short Description
- Long Description
- Developer Name
- Developer Email Address.

9. Go to **Scopes** and click **Add Scopes**.

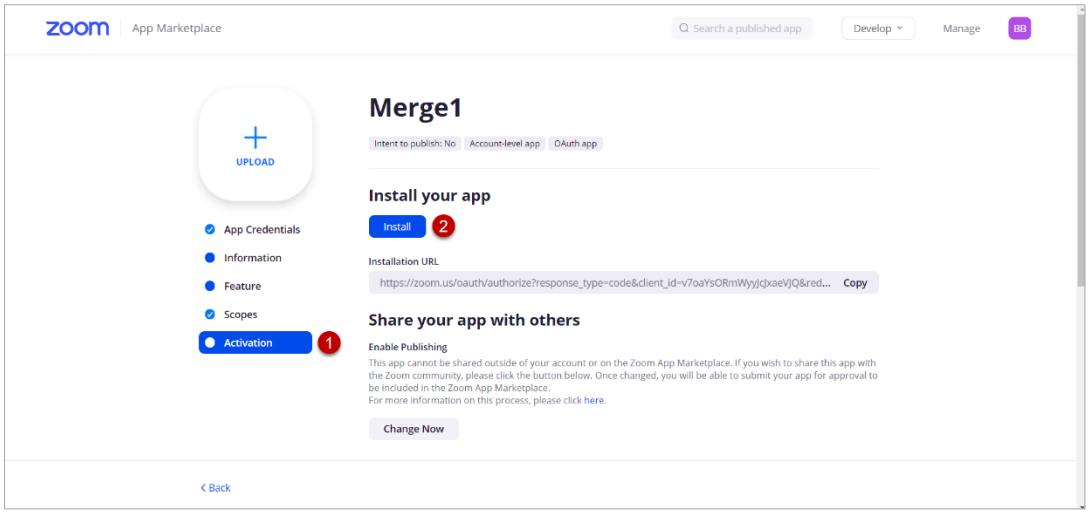


10. Add the following scopes to the application and click **Done**:

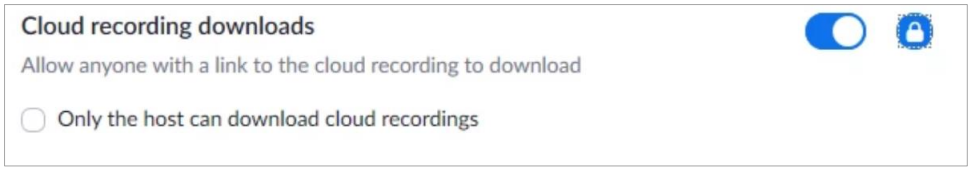
- Meeting > View all user meetings
- Recording > View all user recordings
- User > View all user information
- Dashboard > View all users' meetings information on Dashboard.



11. Go to the **Activation** section and click **Install**.



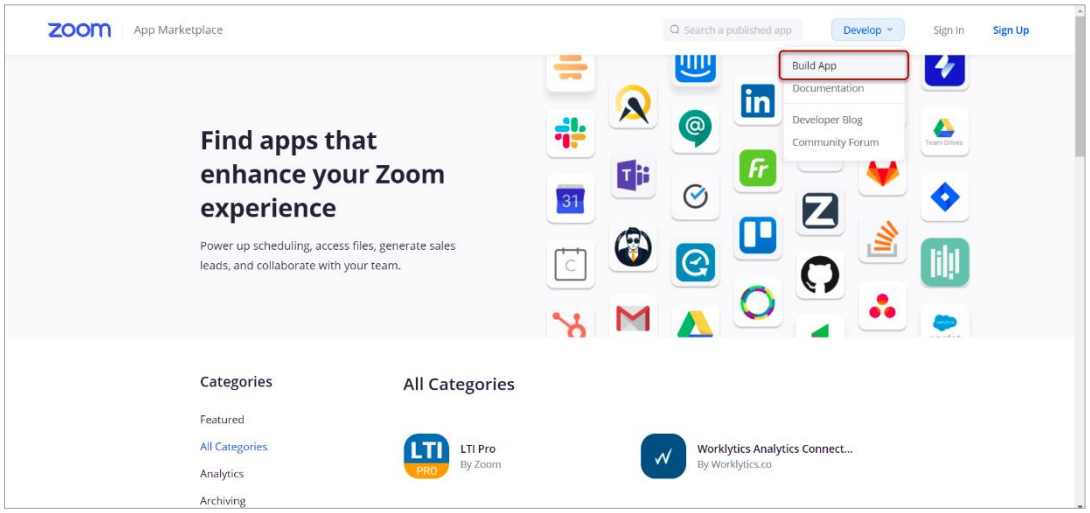
12. To enable Merge1 to download meeting recordings, the Admin must enable "Cloud recording downloads" setting and Do not prevent non-host downloads. To do that, go to **Account Management > Account Settings > Recording**.



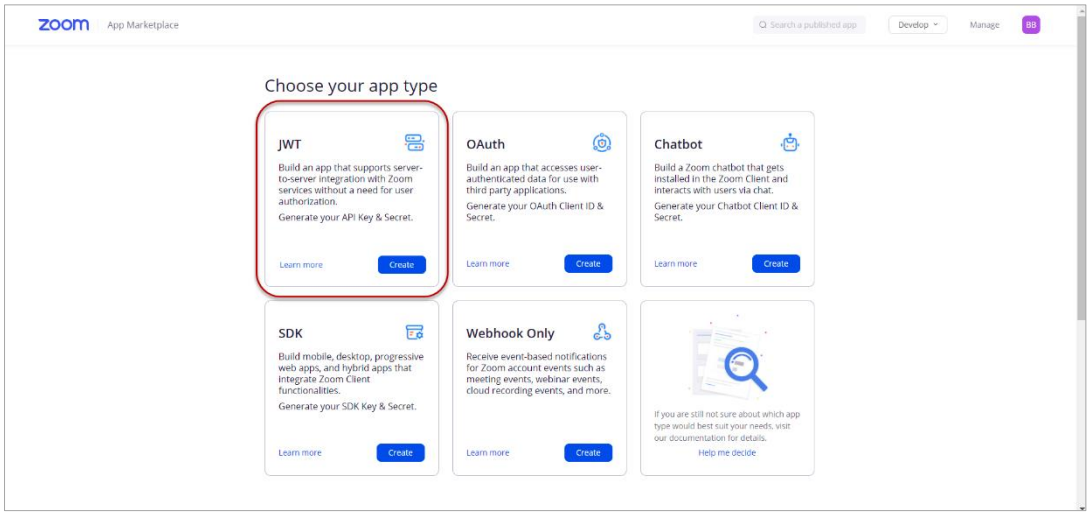
Creating a JWT Application

To create a JWT Application, follow the steps below:

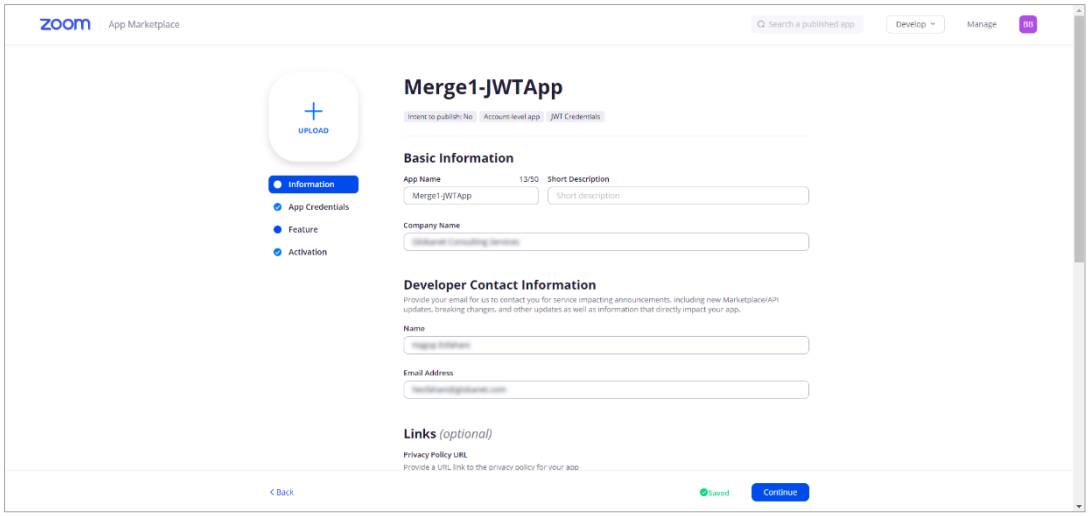
1. Go to Zoom Marketplace: https://marketplace.zoom.us/.
2. Select **Develop > Build App**.



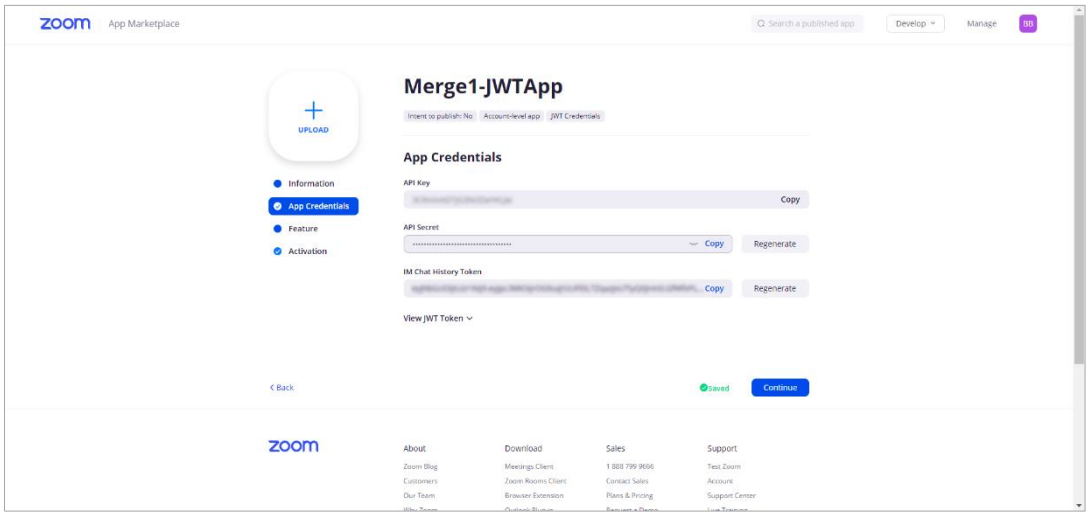
3. Sign in if prompted.
4. Choose the **JWT** application type.



5. Fill in the fields in the following sections:
   - Basic Information
   - Developer Contact Information



6. Copy the **API Key** and the **API Secret**. Zoom platform generates a set of unique credentials used to generate the tokens needed to authorize each request. They will be used later in Merge1 Zoom connector configuration page.

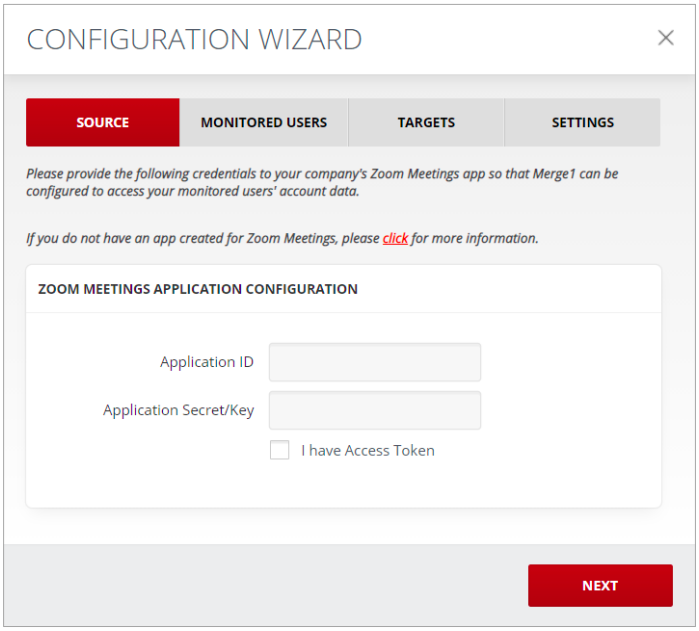


Having retrieved the App Credentials, the JWT app is all set to make requests to any Zoom APIs.

Connector Configuration

To configure the connector, follow the steps below:

1. Enter **Client ID** in the **Application ID** field.
2. Enter **Client Secret** in the **Application Secret/Key** field. Click **Next**.

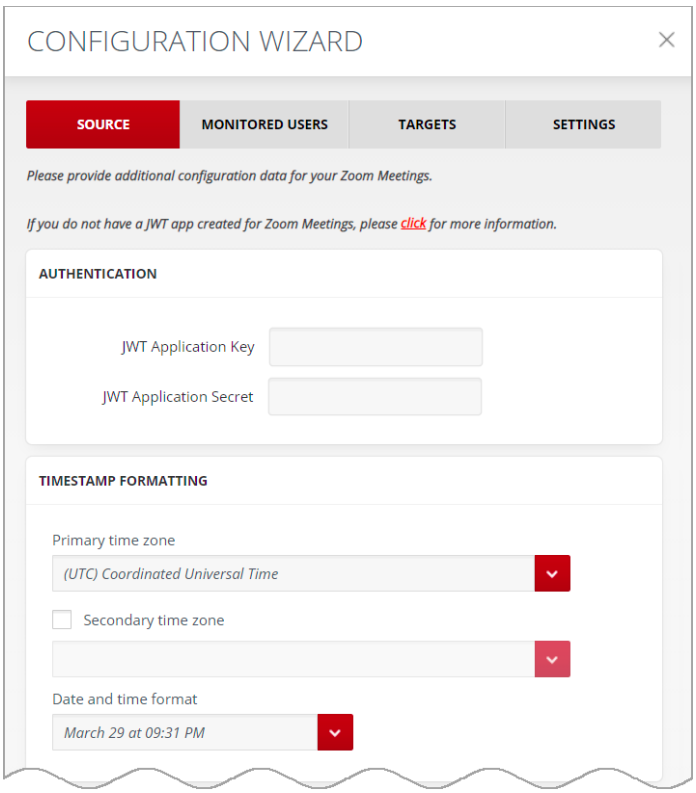


Zoom Meeting Application Configuration

In the opened pop-up window, confirm the application connection. Make sure that the pop-ups are not disabled in the browser window.

In the authentication section:

- Enter **API Key** in the **JWT Application Key** field.
- Enter **API Secret** in the **JWT Application Secret** field.



Part 1

Timestamp Formatting

In the **Timestamp Formatting** section, in addition to the primary stamp, a second timestamp can be enabled with its time zone. From the drop-down menu you can choose the time zone of the timestamp.

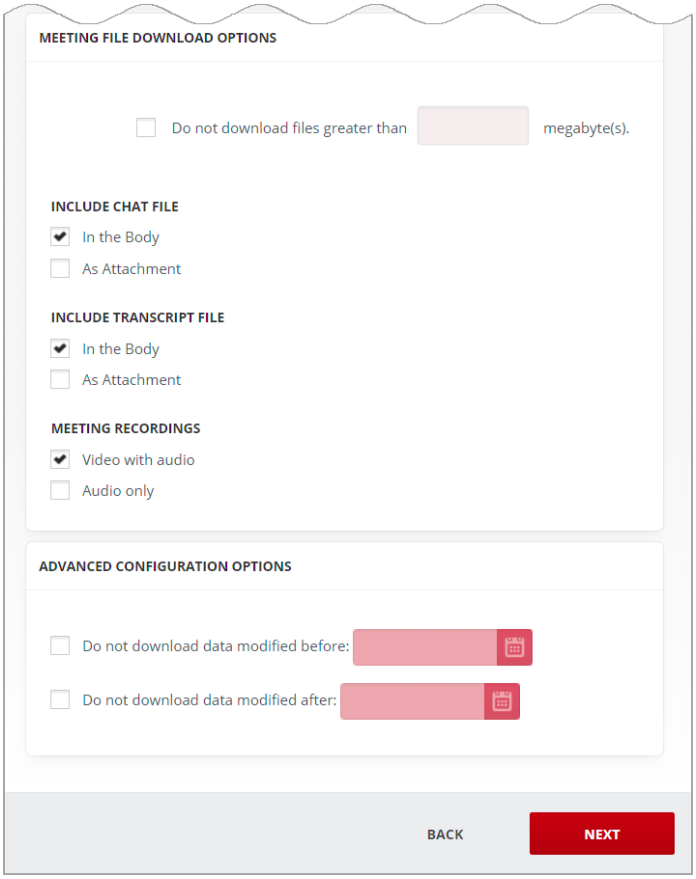
The format of the timestamp in the output message can also be specified from the six options in the Datetime Format drop-down list.

Meeting File Download Options

For the **Meeting File Download Options** section:

- When **Do not download files greater than X megabyte(s)** is selected, the files, that are bigger than the filled-in number of megabytes, are not downloaded.
- **Include Chat File** option specifies how the chat file is added to the imported message: in the body of the message or attached to the message as a separate file.
- **Include Transcript File** option specifies how the chat file is added to the imported message in the body of the message or attached to the message as a separate file.

- **Meeting Recordings** option specifies whether video with audio or only audio is included in the imported message.



Part 2

Advanced Configuration Options

For **Advanced Configuration Options** section the **Do not download data modified before** and **Do not download data modified after** options 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.

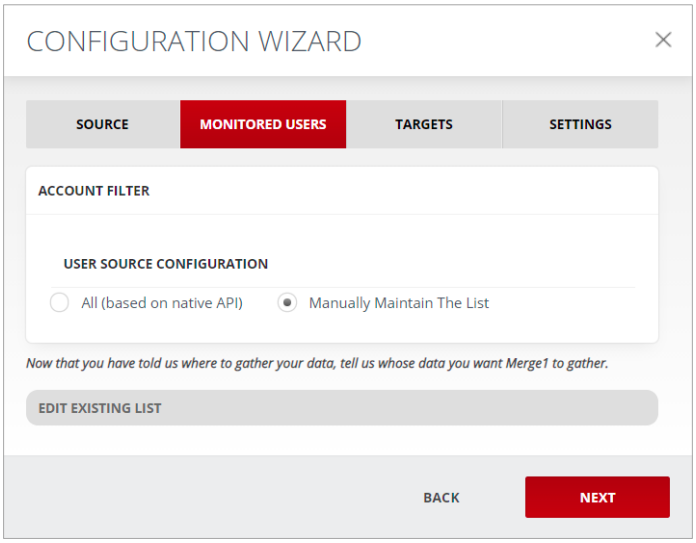
Monitored Users

Monitored Users are individuals whose data is collected by Merge1.

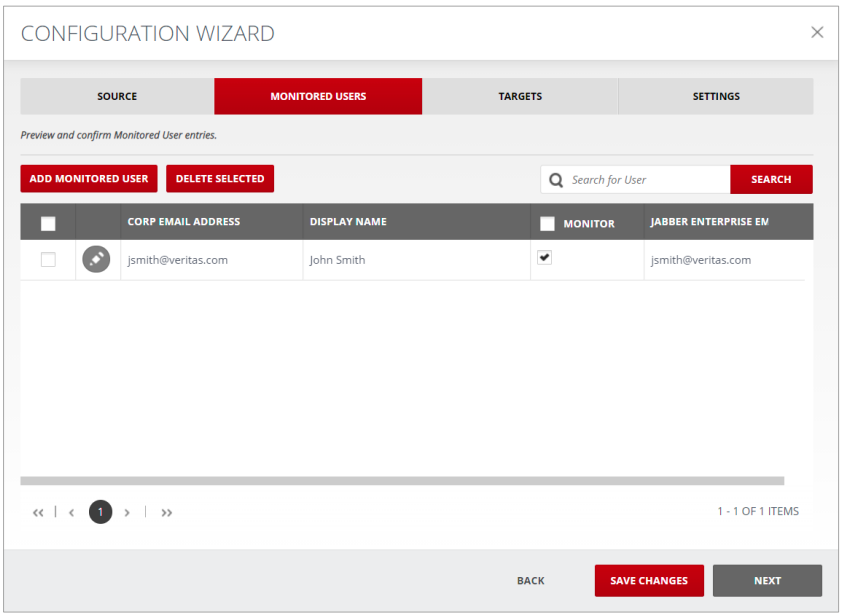
There are two User Sources from where Monitored Users can be added to the connector.

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

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



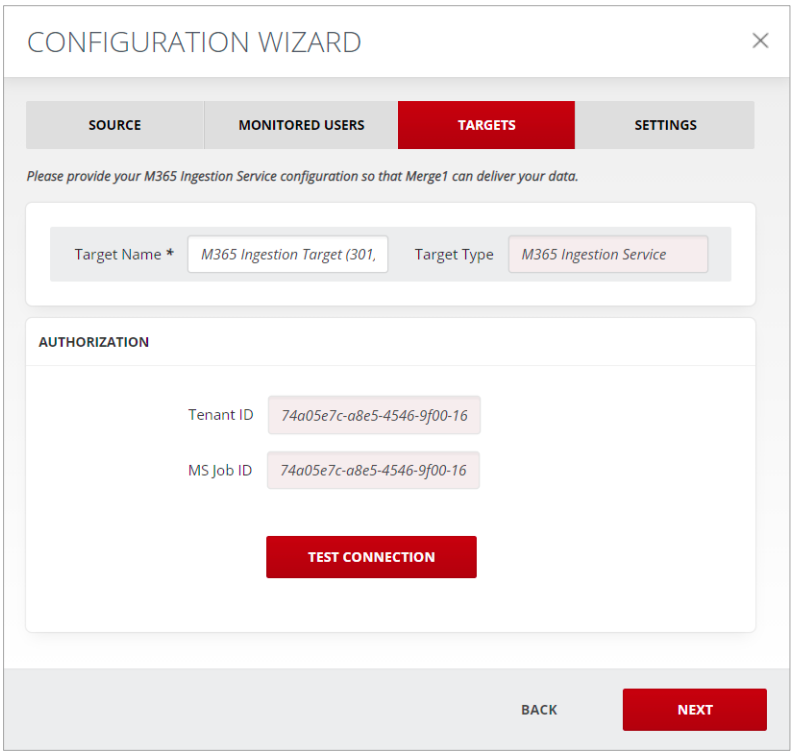
This will allow manually adding and managing users.



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:

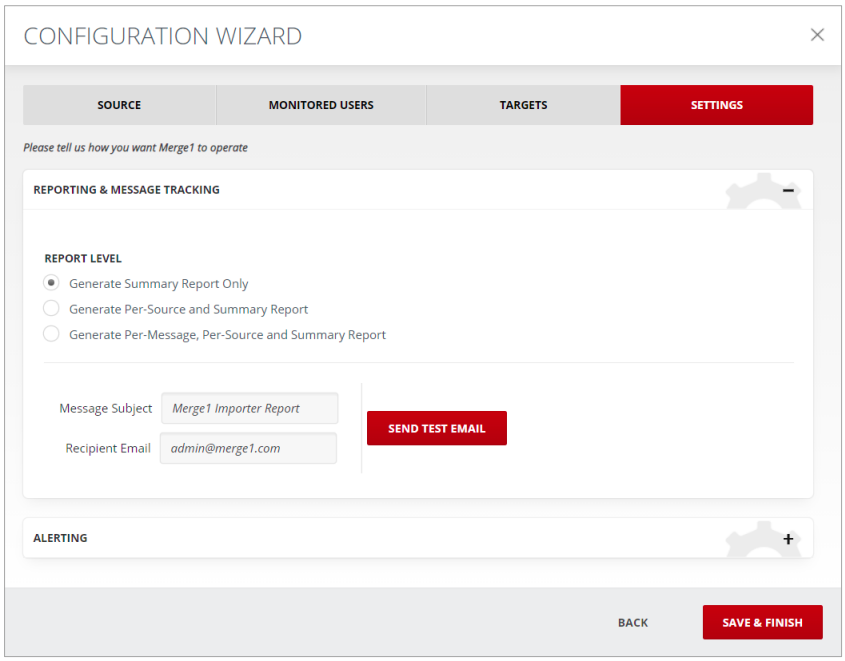
- Reporting & Message Tracking
- Alerting.

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.

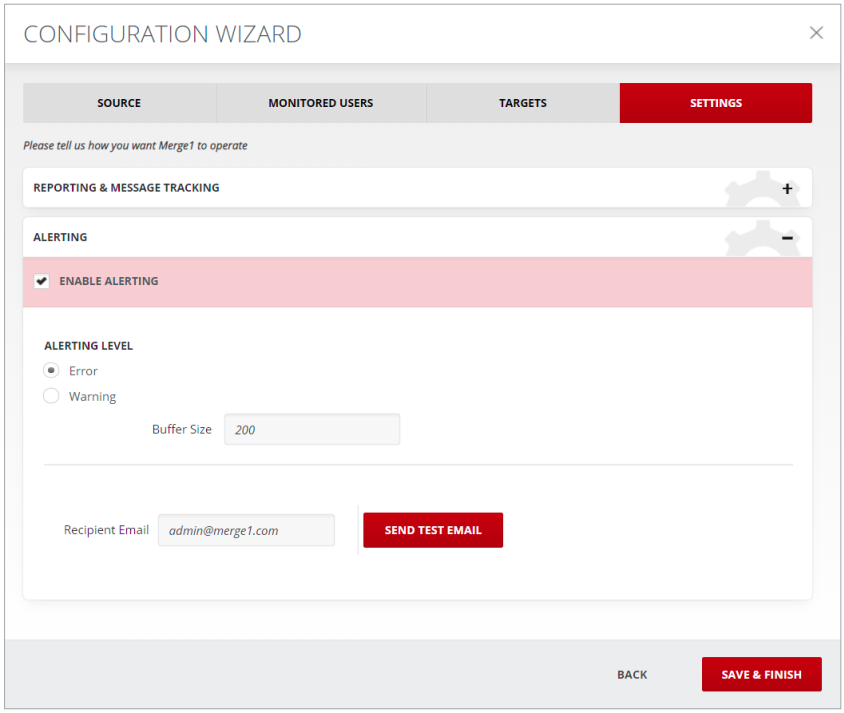
Reports are based on the activities that can be captured from the connectors.



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.

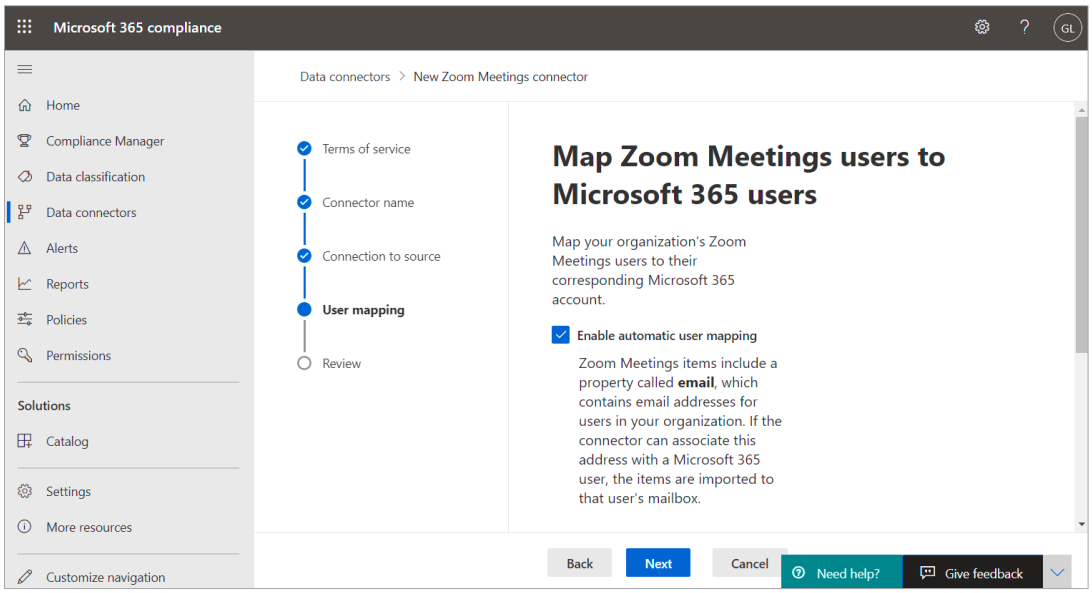
To configure the alerting, specify the **Buffer Size**.

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*User Mapping section of the M365 Compliance Center.

User Mapping

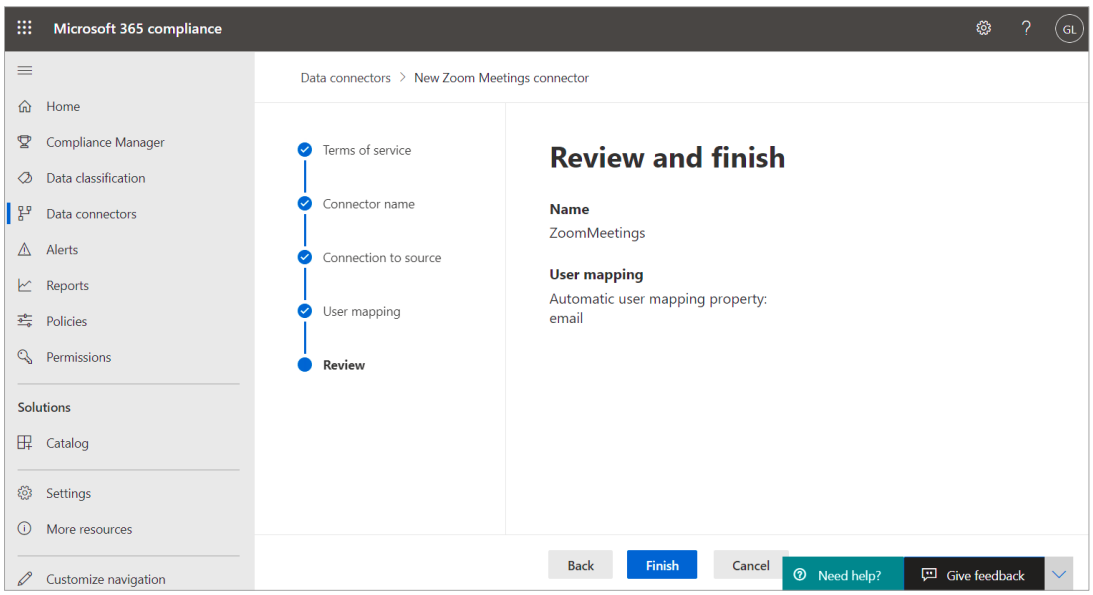
Provide the required user mapping.



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!