

# VERITAS™

## Third-Party Connectors

### MS SQL Database Importer

#### 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

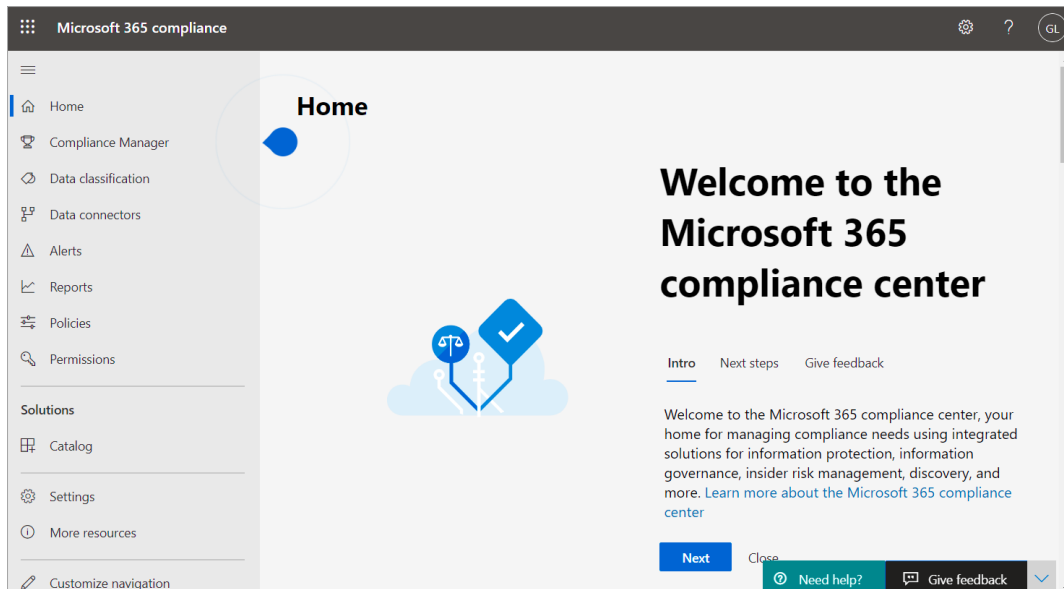
Many of the implementation steps, required to archive MS SQL Database are external to Microsoft 365 and must be completed before you can create the connector in the compliance center.

- Create a Merge1 account by accepting their terms and conditions for MS SQL Database importer. Here you will need to contact [Veritas Customer Support](#). You will sign into this account when you create the connector.
- The user, who creates the MS SQL Database importer 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”.

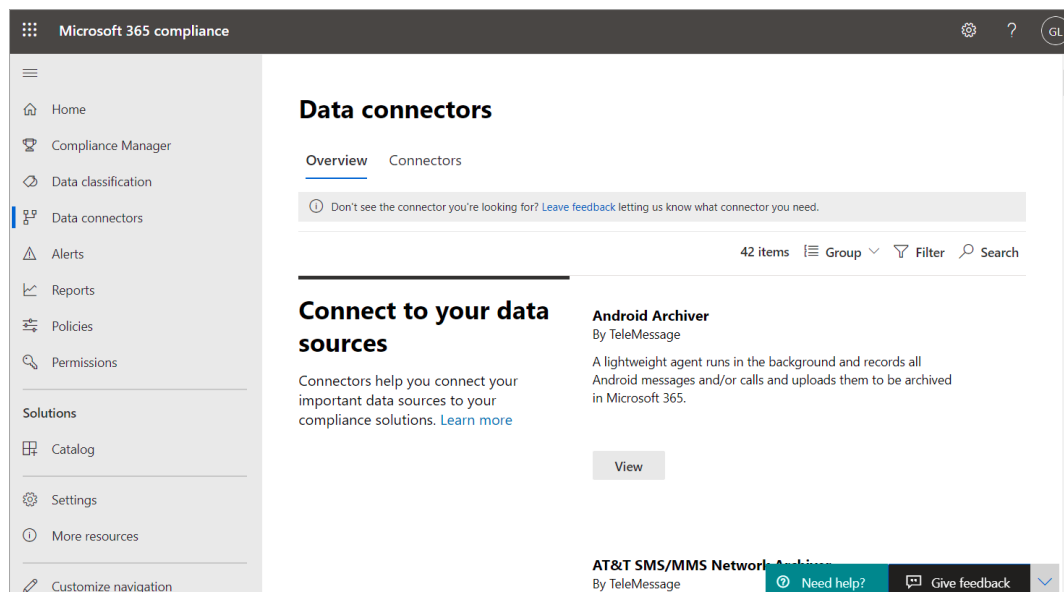
# Accessing the Data Connectors

To access the Data Connectors, follow the steps below:

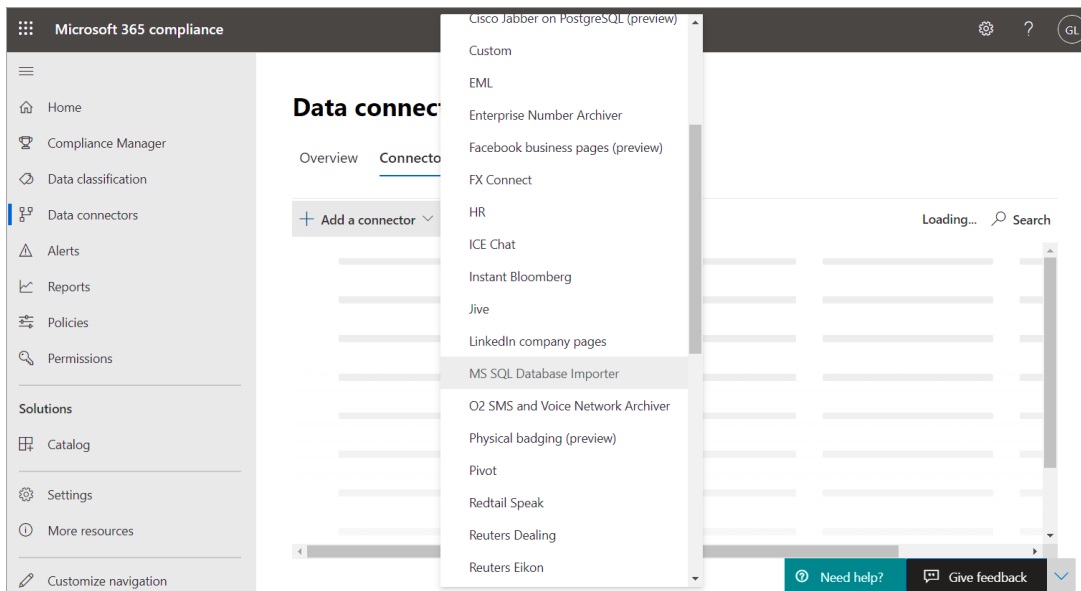
1. Go to <https://compliance.microsoft.com> web page.



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 **MS SQL Database Importer** from the list. For more details on how to set up the connector see [SETTING UP MS SQL DATABASE IMPORTER](#).



## CHAPTER 2

# Setting Up MS SQL Database Importer

This chapter represents:

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



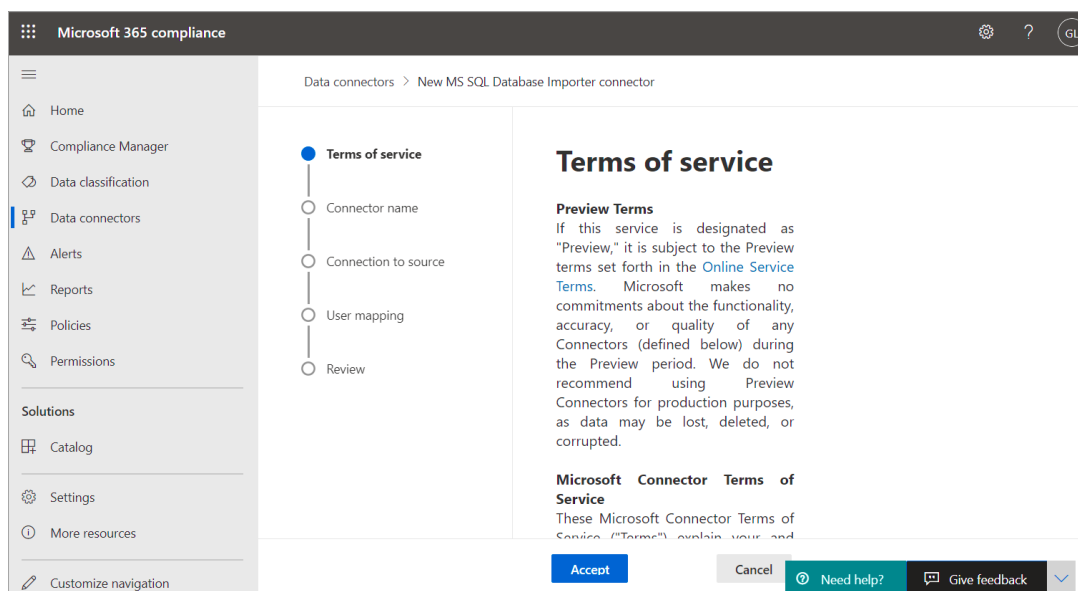
## Overview

To set up a new MS SQL Database Importer, you need to complete the following steps:

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

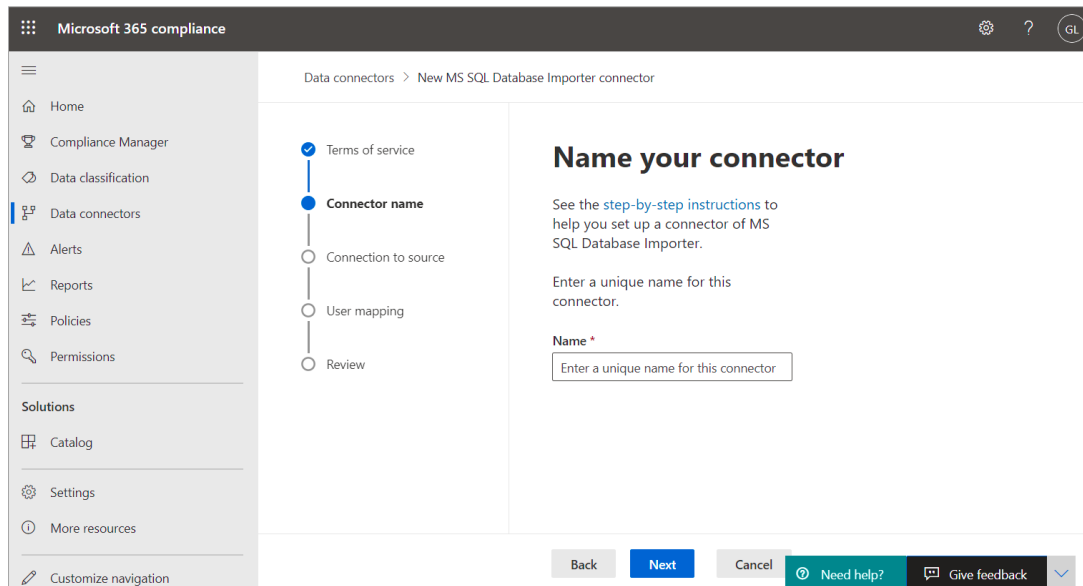
## Terms of Service

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

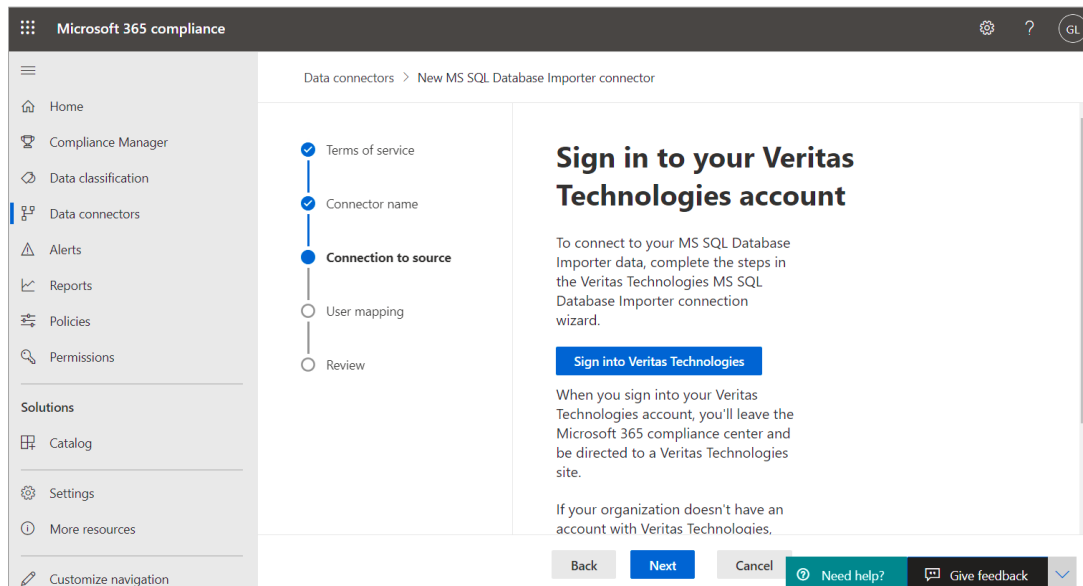


## Connector Name

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



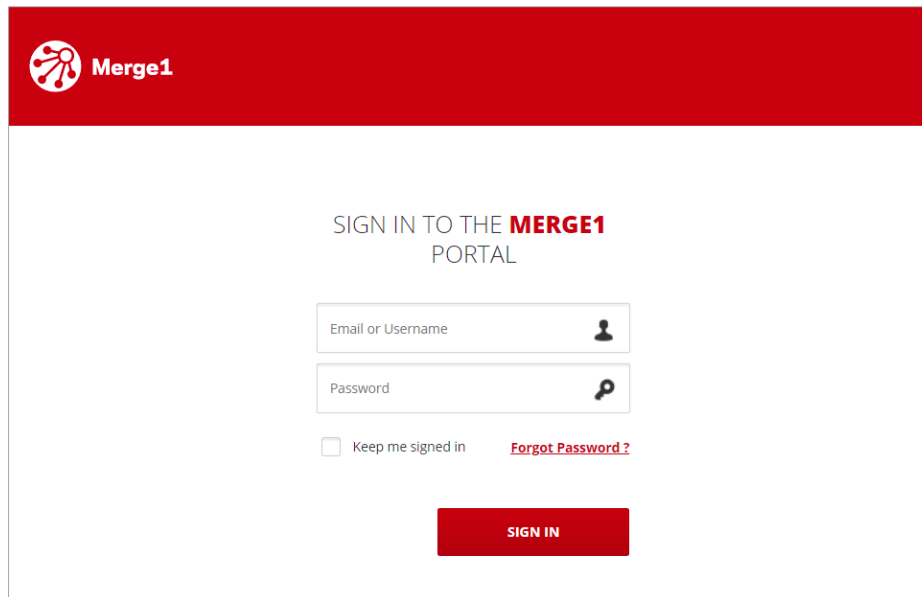
Click **Next**, to be navigated to the **Sign in to your Veritas Technologies account** page.



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

MS SQL Database Importer 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.

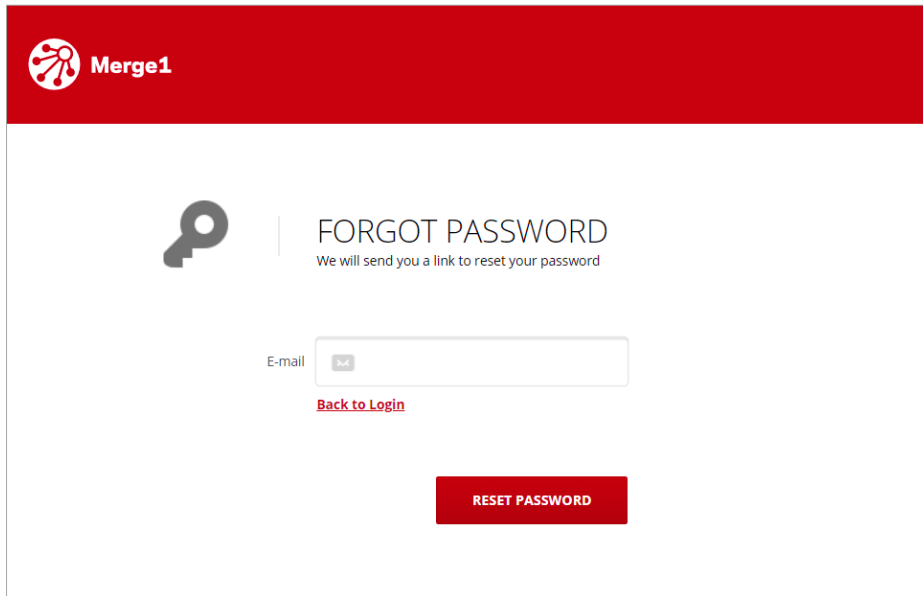
## Password Recovery

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

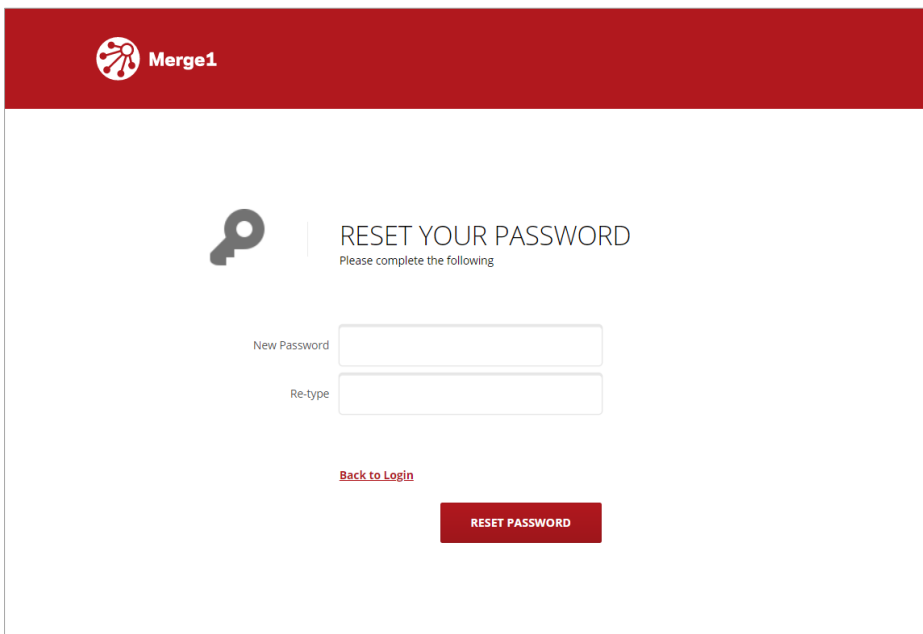
 **FORGOT PASSWORD**  
We will send you a link to reset your password

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" asterisk is present above the form. The form also includes a "Submit form" button and the Microsoft logo.

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### 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\*

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 MS SQL Database Importer from the Merge1 product.

Now, when you are redirected to the Veritas Merge1 page, you can start configuring the MS SQL Database Importer. For more details on how to configure the connector, see [CONFIGURING THE MS SQL DATABASE IMPORTER](#).



## CHAPTER 3

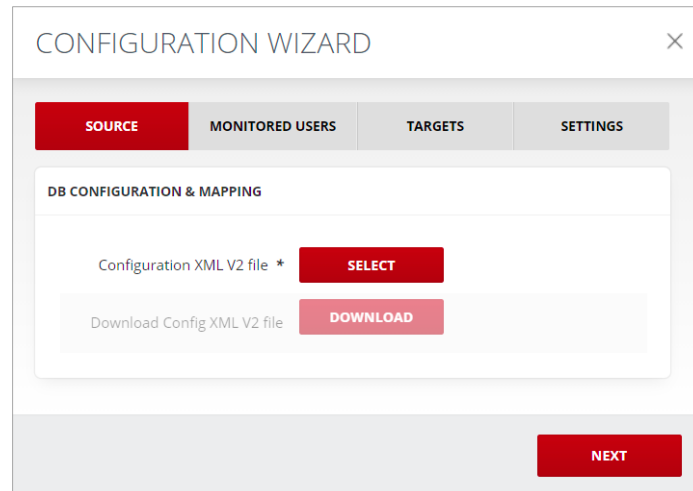
# Configuring the MS SQL Database Importer

This chapter represents:

- Source
- Targets
- Settings
- User Mapping
- Review

## Source Configuration

Select the **Configuration XML V2 file** for **DB configuration and Mapping** by uploading an XML file.



The screenshot shows a window titled "CONFIGURATION WIZARD" with a close button (X) in the top right corner. Below the title bar is a navigation bar with four tabs: "SOURCE" (highlighted in red), "MONITORED USERS", "TARGETS", and "SETTINGS". The main content area is titled "DB CONFIGURATION & MAPPING" and contains two rows of controls. The first row has the text "Configuration XML V2 file \*" followed by a red "SELECT" button. The second row has the text "Download Config XML V2 file" followed by a red "DOWNLOAD" button. At the bottom right of the wizard, there is a red "NEXT" button.

By clicking **Next**, you will be navigated to the **Monitored Users** tab.

Note that **Monitored Users** tab is not applicable for this connector.

By clicking **Skip**, you will be navigated to the [Targets](#) tab of the Configuration Wizard.

## Targets

The information required for configuration of the targets is pre-populated on this screen. This information cannot be edited.

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

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

## Settings

The final step for the Importer Configuration Wizard is the Settings. Under this tab you will have the opportunity to configure the following:

- Reporting & Message Tracking
- Alerting.

### Reporting & Message Tracking

The following section of the Settings tab refers to email reports, which may be used to deliver statistical information via email.



- 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.

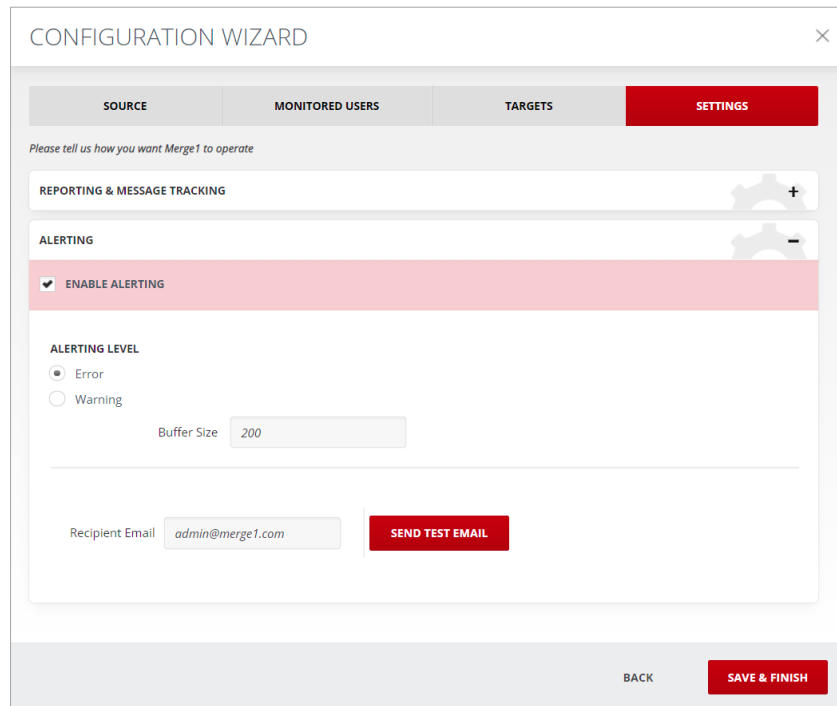
Reports are based on the activities that can be captured from the connectors.

The screenshot shows the 'CONFIGURATION WIZARD' window with the 'SETTINGS' tab selected. The 'REPORTING & MESSAGE TRACKING' section is expanded, showing three radio button options for 'REPORT LEVEL': 'Generate Summary Report Only' (selected), 'Generate Per-Source and Summary Report', and 'Generate Per-Message, Per-Source and Summary Report'. Below these are input fields for 'Message Subject' (containing 'Merge1 Importer Report') and 'Recipient Email' (containing 'admin@merge1.com'), along with a 'SEND TEST EMAIL' button. The 'ALERTING' section is collapsed. At the bottom, there are 'BACK' and 'SAVE & FINISH' buttons.

- 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 the 'SETTINGS' tab selected. The 'ALERTING' section is expanded, showing the following configuration 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.

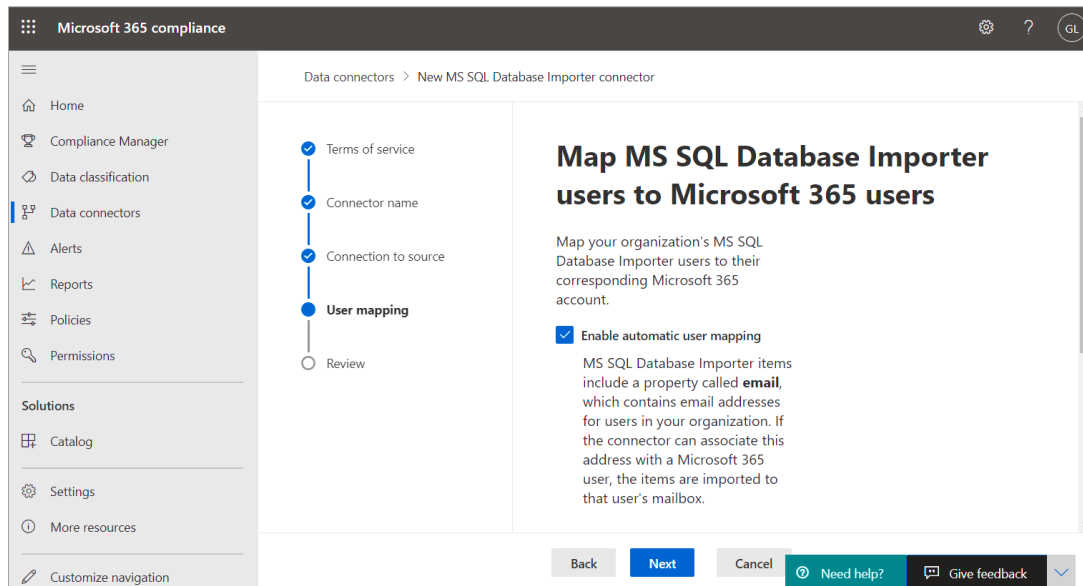
To configure the alerting, specify the **Buffer Size**.

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

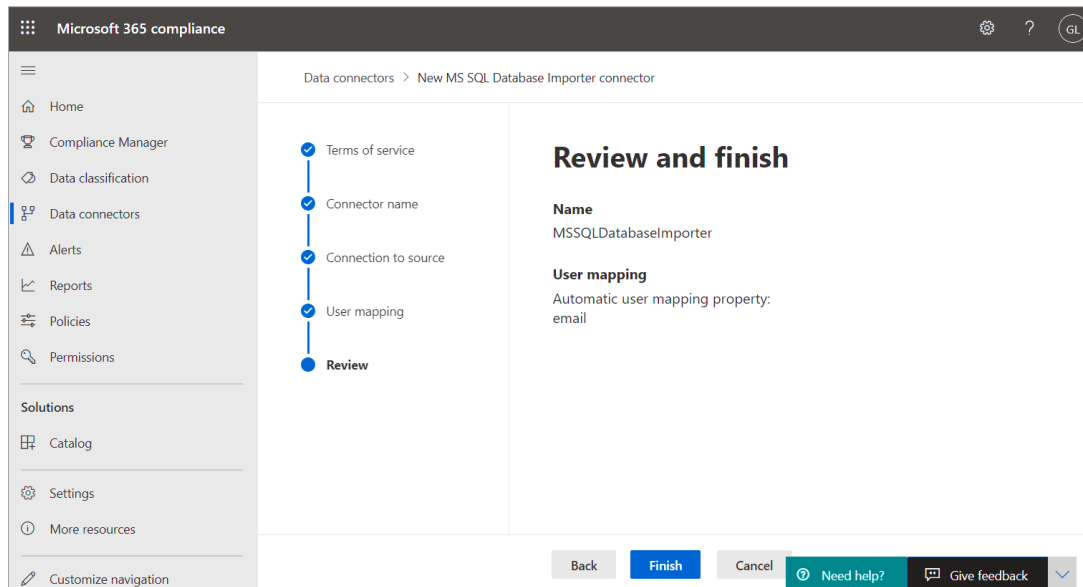
Provide the required user mapping.



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!

