Enterprise Vault™ Setting up Microsoft Teams Archiving

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Enterprise Vault™: Setting up Microsoft Teams Archiving

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Contents

Chapter 1

About this guide

This chapter includes the following topics:

Introducing this guide

This guide describes how to set up Enterprise Vault Microsoft Teams archiving to archive conversations from Microsoft Teams.

This guide makes the following assumptions:

- You have already installed and configured Microsoft Teams.
  For more information, refer to the Microsoft Teams documentation.
- You have already installed and configured Veritas Merge1 in your environment to collect Microsoft Teams data.
- You have already created a Veritas Merge1 account for Microsoft connectors. To create an account, contact Veritas Customer Support.
- You are familiar with several Enterprise Vault features, including the Administration Console.
- You know how to administer your storage hardware.

Where to get more information about Enterprise Vault

Table 1-1 lists the documentation that accompanies Enterprise Vault. This documentation is also available in PDF and HTML format in the Veritas Documentation Library.

Table 1-1 Enterprise Vault documentation set

Document	Comments
Veritas Enterprise Vault Documentation Library	Includes all the following documents in Windows Help (`.chm`) format so that you can search across them all. It also includes links to the guides in Acrobat (`.pdf`) format. You can access the library in several ways, including the following: ■ In Windows Explorer, browse to the `Documentation\`*`language`*`\Administration Guides` subfolder of the Enterprise Vault installation folder, and then open the `EV_Help.chm` file. ■ On the **Help** menu in the Administration Console, click **Help on Enterprise Vault**.
Introduction and Planning	Provides an overview of Enterprise Vault functionality.
Deployment Scanner	Describes how to check the required software and settings before you install Enterprise Vault.
Installing and Configuring	Provides detailed information on setting up Enterprise Vault.
Upgrade Instructions	Describes how to upgrade an existing Enterprise Vault installation to the latest version.
Setting up Domino Server Archiving	Describes how to archive items from Domino mail files and journal databases.
Setting up Exchange Server Archiving	Describes how to archive items from Microsoft Exchange user mailboxes, journal mailboxes, and public folders.
Setting up File System Archiving	Describes how to archive files that are held on network file servers.
Setting up IMAP	Describes how to configure IMAP client access to Exchange archives and Internet Mail archives.
Setting up SharePoint Server Archiving	Describes how to archive documents from Microsoft SharePoint servers.
Setting up SMTP Archiving	Describes how to archive SMTP messages from other messaging servers.
Setting up Microsoft Teams Archiving	Describes how to archive Microsoft Teams data.
Administrator's Guide	Describes how to perform day-to-day administration procedures.

Table 1-1 Enterprise Vault documentation set *(continued)*

Document	Comments
PowerShell Cmdlets	Describes how to perform various administrative tasks by running the Enterprise Vault PowerShell cmdlets.
Backup and Recovery	Describes how to implement an effective backup strategy to prevent data loss, and how to provide a means for recovery in the event of a system failure.
Reporting	Describes how to implement Enterprise Vault Reporting, which provides reports on the status of Enterprise Vault servers, archives, and archived items. If you configure FSA Reporting, additional reports are available for file servers and their volumes.
NSF Migration	Describes how to import content from Domino and Notes NSF files into Enterprise Vault archives.
PST Migration	Describes how to migrate content from Outlook PST files into Enterprise Vault archives.
Utilities	Describes Enterprise Vault tools and utilities.
Registry Values	A reference document that lists the registry values with which you can modify many aspects of Enterprise Vault behavior.
Help for Administration Console	The online Help for the Enterprise Vault Administration Console.
Help for Enterprise Vault Operations Manager	The online Help for Enterprise Vault Operations Manager.

For the latest information on supported devices and versions of software, see the Enterprise Vault Compatibility Charts.

Enterprise Vault training modules

Veritas Education Services provides comprehensive training for Enterprise Vault, from basic administration to advanced topics and troubleshooting. Training is available in a variety of formats, including classroom-based and virtual training.

For more information on Enterprise Vault training, curriculum paths, and certification options, see https://www.veritas.com/services/education-services.

Chapter 2

Introducing Microsoft Teams Archiving

This chapter includes the following topics:

About Enterprise Vault Microsoft Teams Archiving

Enterprise Vault enables you to archive Microsoft Teams instant messaging (IM) and channel communications. This in turn helps support the compliance requirements that are specified in industry and government regulations.

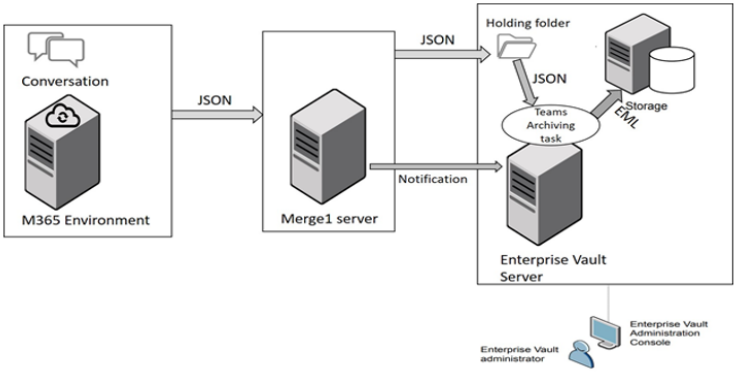
Enterprise Vault archives the following:

- Peer-to-peer chat conversations
- Private channel messages
- Public channel messages

Microsoft Teams Archiving Overview

Microsoft Teams Archiving with Enterprise Vault links the Microsoft 365 environment and Enterprise Vault using Merge1 server. Enterprise Vault assumes that archiving is enabled for individual or all users in the Microsoft 365 Domain and appropriate archiving policies have been applied. Enterprise Vault requires Microsoft 365 and Merge1 environment details to actively archive conversations to a file server. These conversations are then archived in the Enterprise Vault environment as EML files.

The following figure illustrates the process when archiving a conversation from Microsoft Teams.



The archiving process is as follows:

- A conversation takes place between Microsoft Teams users.
- Merge1 fetches the conversation JSON and sends them to the chat holding folder on the Enterprise Vault server.
- Merge1 notifies Enterprise Vault after every 50 messages.
- Enterprise Vault segregates the messages by date and chat room id in a chat segregated folder.
- Teams archiving task processes files in the chat segregated folder and creates EML files for each room id and day.
- Teams archiving task archives the item in a Teams archive. During processing, the task applies the retention category or retention plan that is specified in the target properties.

Microsoft Teams Archiving Components

The following table provides an overview of the main components of Microsoft Teams archiving. You can configure Microsoft Teams archiving using the Enterprise Vault Administration Console.

Table 2-1 Microsoft Teams Archiving components overview

Component	Description
Teams Archiving task	The Teams Archiving task processes the JSON conversation files in the holding folder as follows: ■ Creates EML files from the segregated JSON files. 1 EML per chat room, per day. ■ Stores the conversations in the archive that is associated with the importer. ■ Applies the target retention category or retention plan. ■ Deletes the conversation files from the holding folder by default, when archiving is completed successfully. If errors occur, the task does not delete the files.
Teams holding folder	The Teams holding folder is a shared folder that is assigned to the Teams Archiving task. The folder location is in the Teams Importer properties. Conversation JSON files are placed in the folder for the archiving task to process. Conversations which the archiving task fails to archive are not deleted automatically from the holding folder. These conversations are placed in a Failed subfolder called `BrokenChatHolding`.
Teams policies	A Teams policy is assigned to a Importer. The policy defines rules based on which the Importer collects data from Microsoft Teams. The Teams policies are displayed in the Administration Console, under Policies > Microsoft 365 > Teams.
Retention categories and retention plans	Retention categories are assigned to conversations when the conversations are archived. This categorization makes it easier to retrieve conversations because it is possible to search by retention category. Users can select retention categories and assign them to Teams conversations. When Enterprise Vault archives a conversation, it is stored with the appropriate retention category. With a retention plan, you can associate a retention category with several other settings, such as a classification policy and the criteria for discarding expired conversations. All these settings can be applied to one or more archives. For more information, refer to the topic "Working with retention categories and retention plans" in the *Enterprise Vault Administrator's Guide*.

Table 2-1 Microsoft Teams Archiving components overview *(continued)*

Component	Description
Microsoft 365 Connection	Connection holds the authentication information to connect to Merge1 server and Microsoft 365 server. The Microsoft 365 Connections are displayed in the Administration Console, under Targets > Microsoft 365 > Connections.
Importer	The Importer downloads Microsoft Teams data to Veritas Enterprise Vault. The importer properties contain following settings: ■ A Microsoft 365 Connection. ■ A Teams Policy. ■ An archive. ■ A vault store. ■ A retention category or retention plan. ■ Teams holding folder. ■ Log folder. ■ Monitored users. ■ Date Range filter. ■ Schedule information to collect Microsoft Teams data. The Importers are displayed in the Administration Console, under Targets > Microsoft 365 > Importers.
Teams archives	A new Teams Archive is created for each importer. These are displayed in the Administration Console, under Archives > Teams.

Chapter 3

Configuring Microsoft Teams Archiving

This chapter includes the following topics:

Steps to configure Microsoft Teams archiving

The steps to configure Microsoft Teams archiving are as follows:

1. Configure a Microsoft 365 connection.

   See “Configuring a Microsoft 365 connection” on page 19.

2. Configure a Microsoft Teams policy.

   See “Configuring a Microsoft Teams policy” on page 22.

3. Configure an Importer.

See "Configuring an Importer" on page 24.

Note: You must configure Microsoft Teams archiving only from the Enterprise Vault Administration Console. You are strongly discouraged from making any Teams-related configuration changes from the Merge1 server console. Teams-related configuration changes from the Merge1 server console is not recommended.

Roles-based administration (RBA) and Microsoft Teams Archiving

To configure Microsoft Teams Archiving, you must log in using the Vault Service account or an account that is assigned to the Microsoft 365 Administrator role.

The Microsoft 365 Administrator role is also included in the Power Administrator role.

For more information on roles-based administration, see the Administrator's Guide.

Assigning the permissions required for exporting data from Microsoft Teams

Creating the Microsoft application for Merge1 Importer

Perform the following steps on the Microsoft Azure portal to create the Microsoft application for the Merge1 importer:

Note: Only a Microsoft Office 365 or Microsoft Azure administrator of your organization can create the Microsoft application for the Merge1 importer.

1. Navigate to https://portal.azure.com and log on to your organization's Microsoft Azure account.
2. Click on **Azure Active Directory** and select **App registrations**.
3. In the command pane to the top, click on **New registration**.
4. In the opened **Register an Application** window fill in the **Name** and click the **Register** button.
5. Copy the **Application ID** and **Directory (tenant) ID** from the **Overview** section to later use them in the connection creation.

6. Navigate to **Certificates and Secret** and upload the certificate. The thumbprint of the certificate will be later used for connection creation.
7. In the navigation pane to the left, under **Certificates & secrets**, click **API permissions**.
8. Add the following permissions:

Microsoft Graph

Channel

Channel.ReadBasic.All

ChannelMember

[ChannelMember.Read.All]

ChannelMessage

ChannelMessage.Read.Al

Chat

- Chat.Read.All
- Chat.ReadBasic.All

Files

Files.Read.All

Group

Group.Read.All

Team

Team.ReadBasic.All

User

User.Read.All

SharePoint

Sites

Sites.Read.All

User

User.Read.All

Grant all the above referenced permissions.

Ensure that the Azure AppRegistration is granted with the additional privileges to access the Protected APIs from Microsoft. Click on the following link and access the **request form**. Fill up the details in the request form and submit to Microsoft:

https://docs.microsoft.com/en-us/graph/teams-protected-apis

Preparing to configure a Microsoft 365 connection

The **New Connection** wizard enables you to add a connection and perform the following actions:

- Connect to the Azure Active Directory
- Configure Importers for collection of Microsoft Teams data

Prerequisites: Information required from the Microsoft Azure administrator

Ensure that you have the following information available with you from your Microsoft Azure administrator:

- **Application ID** and **Tenant ID** which you have copied at **step 5** in Assigning the permissions required for exporting data from Microsoft Teams.
- X509 certificate's thumbprint or X509 certificate and its password

Prerequisites: Information required from the Veritas Merge1 administrator

Ensure that you have the following information available with you from your Veritas Merge1 administrator:

Note: To learn how to collect the Merge1 information, see Collecting Merge1 information.

- Merge1 instance URL
- API Client Application ID associated with the Merge1 server
- API Client Secret associated with the Merge1 server

Prerequisites: Acquiring a certificate thumbprint

Merge1 requires an SSL certificate to use in the authentication flow. This certificate must be generated by the customer and the certificate thumbprint must be entered in the "X509 Certificate Thumbprint" field of Connector Configuration.

Note: If you want to generate your own X.509 certificate, see Steps to generate a self-signed certificate (X.509) for the Merge1 server.

You can also use the same certificate used by Merge1 Web Application, to do this launch PowerShell and run the command below, this might return several certificates. Choose the one depending on your requirements and copy the thumbprint.

```
Get-ChildItem -path cert:\LocalMachine\My
```

Prerequisites: Setting up the Data Access Account

To be able to create a connection, the Data Access Account must be set on the Directory properties. You must create an Enterprise Vault anonymous user. For more information about creating an anonymous user, see https://www.veritas.com/support/en_US/article.100022472.

If you already have a Data Access Account user created, you can use the same account. You must re-enter the credentials associated with the account at **Directory properties > Data Access Account**, so that the user account is configured in the IIS Merge1WebHook application.

Prerequisites: Installing the Enterprise Vault site certificate from IIS on the Merge1 server

You must install the Enterprise Vault site certificate from IIS on the Merge1 server.

Prerequisites: Installing the Merge1 server certificate on Enterprise Vault server

Install Merge1 server self-signed certificate or X509 certificate of Merge1 server (which is uploaded on the Microsoft Azure portal) under the local machine's trusted root on the Enterprise Vault server.

Collecting Merge1 information

This topic contains information that enables you to collect the Merge1 information which is required for setting up Microsoft Teams archiving.

API Clients

This section describes the Merge1 API basic auth feature which allows managing Client Applications for having access to the Merge1 REST APIs.

Activating API Clients in the Merge1 UI

The API Clients section is hidden from the Merge1 UI. To display the API Clients section in the navigation pane, perform one of the following actions:

1. Go to **System Properties > Environment Variables > System Variables**.
2. Click **Add new**. The **New system variable** window opens.
3. Enter **Merge1:Environment** as the Variable name and **EV** as the **Variable value**.
4. Restart **IIS**.

OR

1. Go to `C:\Program Files\Globanet Consulting Services\Merge1 6.0\Bin\Configuration`.
2. Open the `appsettings.json` file.
3. Add `"Environment": "EV"` to the file. For example,

4. Restart **IIS**.

When the variable is added, the API Clients section is displayed on the navigation pane.

Managing API Clients

This section describes how to add an application.

Adding an Application

To add an application:

1. Go to the **API Client** section of the navigation pane.
2. Click **ADD APPLICATION**.
3. In the pop-up window, enter **Application Name** (maximum 64 characters length).

   The specified inactive Role is used to define the level of accessibility.
4. Click **ADD**.

The application consists of the following fields:

Table 3-1 Application fields

Component	Description
Name	The application name is specified.
Role	The level of accessibility is specified.
Application ID	The application ID is presented. You can copy the ID by clicking the **Copy** option.

Managing Secrets

This section describes how to add a secret.

To navigate to secrets, click **Go to Secrets** located on the left bottom corner of the application.

Adding a Secret

To add a secret:

1. Click **ADD SECRET**.
2. In the opened window, enter a **Description** (maximum 500 characters length) for the secret and select the **Expiration period**.

   The specified expiration period is used to invalidate the secret.

   Available periods are:

   - Recommended: 6 months
   - 3 months
   - 12 months
   - 18 months
   - 24 months
   - Custom

   You can select one of the available periods from the drop-down list. Also, you can specify a custom expiration date by selecting the **Custom** option from the list and specifying the date.

The secret consists of the following fields:

Table 3-2 Secret fields

Component	Description
Description	The description of the secret.
Client Secret	The client secret is specified. Note that the Client secret is displayed only when you create the secret. Copy the secret using the **Copy** option, and save it in a secure location for later usage.
Expires	The expiration date is specified.

Configuring a Microsoft 365 connection

To create the connection

1. In the left pane of the Enterprise Vault Administration Console, click **Targets > Microsoft 365 > Connections**.
2. To create a new connection, right-click on Connections and select **New > Connection**.

   The **New Connection** wizard opens.
3. Click **Next**.
4. Enter the following details and click **Next**:
   - **Name**: Enter a unique and appropriate name for the new connection.
   - **Description**: Enter an appropriate description for the new connection.
5. Enter the following connection details to connect to the Microsoft Azure Active Directory:
   - **Application ID** and **Tenant ID** which you have copied at **step 5** in Assigning the permissions required for exporting data from Microsoft Teams.
   - **X509 Certificate Source**: If the X509 certificate source is on your local computer, select Local Machine and enter the X509 certificate thumbprint on the corresponding text box..

     If you want to upload the X509 certificate as a PFX file, select **Upload File**. Navigate to the X509 certificate PFX file location and select the certificate. Enter the X509 certificate password on the corresponding text box.
6. Click **Test** to validate the Microsoft Azure Active Directory connection. On successful validation, click **Next**.

7. Enter the following Veritas Merge1 server details to connect to the Veritas Merge1 server:
   - **Merge1 instance URL**: Enter the Merge1 server instance URL.
     The instance URL must be in the `https://hostname:port` format.
     It is recommended that you use the DNS alias for the Merge1 server instance URL.
   - **API Client Application ID**: Enter the API Client Application ID.
   - **API Client Secret**: Enter the API Client Secret.
8. Click **Test** to validate the Merge1 server connection. On successful validation, click **Next**.
9. Review the details that you have entered for the connection.
10. Click **Finish**.

To view and edit the connections

1. In the left pane of the Enterprise Vault Administration Console, click **Targets > Microsoft 365 > Connections**.

   The right pane of the Administration Console displays the available connections.
2. Right-click on a connection to perform the following actions:

Field	Actions
Delete	Allows you to delete a connection. If you want to delete a connection which has been configured to importers, you must first delete the associated Importers and then delete the connection.
Properties	Allows you to view and update the connection properties. You can double-click on a connection to view and update the properties. For more information, see the steps below.

3. If you want to update a connection, double-click on the connection. The connection properties dialog box is displayed and contains the following tabs:

Note: If you want to update a connection which has been configured with the importers, you must first disable the importers on which the connection has been configured. After updating the connection, enable the importers for data collection.

Tab	Details
General	■ **Name**: View the connection name. ■ **Description**: Enter an appropriate description for the connection.
Microsoft 365	■ **Application ID**: Enter the application ID associated with Microsoft Teams. ■ **Tenant ID**: Enter the tenant ID associated with Microsoft Teams. ■ **X509 Certificate Source**: If the X509 certificate source is on your local computer, select **Local Machine** and enter the X509 certificate thumbprint on the corresponding text box. If you want to upload the X509 certificate as a PFX file, select **Upload File**. Navigate to the X509 certificate PFX file location and select the certificate. Enter the X509 certificate password on the corresponding text box. Click **Test** to validate the Microsoft Azure Active Directory connection.
Merge1	■ **Merge1 instance URL**: Enter the Merge1 server instance URL. The instance URL must be in the `https://hostname:port` format. It is recommended that you use the DNS alias for the Merge1 server instance URL. ■ **API Client Application ID**: Enter the API Client Application ID associated with the Merge1 server. ■ **API Client Secret**: Enter the API Client Secret associated with the Merge1 server. Click **Test** to validate the Merge1 server connection.

4. Click **Apply > OK**.

Configuring a Microsoft Teams policy

The Teams policies are the set of rules based on which the Importer collects data from Microsoft Teams.

To add a new Teams policy

1. In the left pane of the Enterprise Vault Administration Console, click **Policies > Microsoft 365**.
2. Click **Teams**.
3. Right-click on Teams and select **New > Policy**.

   The **New Teams Policy** wizard opens.
4. Click **Next**.
5. Enter the following details in the corresponding text boxes and click **Next**:
   - Enter an appropriate name for the new Teams policy.
   - Enter an appropriate description for the new Teams policy.
6. Configure the Teams policy as follows:
   - **Conversation areas to capture**: Select the conversation areas to capture. If you select **All areas**, conversation is captured from chats, private channels, and public channels. If you select certain areas, you can select between private channels and public channels. By default, chat is always selected.
   - **Attachment configuration**: To specify the maximum size of an attachment that can be downloaded, select the **Do not download files greater than** check box and enter the size in MB in the text box.

     If you want to exclude certain file types from being downloaded, select the **Exclude file types** check box and specify the file types in a comma separated format and without any space in between (such as, txt,jpg,png) in the text box.
   - **Participant configuration**: To specify the number of participants for whom you want to capture the conversation, select the required operator from the **Match messages that have** dropdown list and enter the number of participants in the check box.
   - Click **Next**.
7. Review the new Teams Policy configurations and click **Finish**.

To view and update a Teams policy

1. In the left pane of the Enterprise Vault Administration Console, click **Policies > Microsoft 365**.
2. Click **Teams**.

   The right pane of the Administration Console displays the available Teams policies. **Default Teams Policy** is the default Veritas Enterprise Vault Teams policy.
3. Right-click on a policy to perform the following actions:

Field	Actions
Copy Policy	Allows you to copy an existing policy. **1** Click on **Copy Policy**. **2** In the **Copy Policy** dialog box, enter a unique policy name and a policy description in the appropriate text boxes. **3** Click **OK**.
Delete	Allows you to delete a policy. If you want to delete a policy which has been applied on a Importer, you must first delete the associated Importer and then delete the policy.
Properties	Allows you to view and update the policy properties. You can double-click on a policy to view and update the properties. For more information, see the step below.

4. If you want to update a Teams policy, double-click on the policy.

   The Teams policy properties dialog box is displayed.

   Note: If you want to update a policy which has been applied on Importers, you must first disable the importers on which the policy has been applied. After updating the policy, enable the Importers for data collection.

5. The **General** tab displays the following, which you can update:
   - Policy name

- Policy description

6. The **Configuration** tab displays the following, which you can update:
   - **Conversation areas to capture**: The conversation areas to capture. If you select **All areas**, conversation is captured from chats, private channels, and public channels. If you select certain areas, you can select between private channels and public channels. By default, chat is always selected.
   - **Attachment configuration**: The maximum size of an attachment that can be downloaded. Select the **Do not download files greater than** check box and enter the size in MB in the text box.
     If you want to exclude certain file types from being downloaded, select the **Exclude file types** check box and specify the file types in a comma separated format and without any space in between (such as, txt,jpg,png) in the text box.
   - **Participant configuration**: The number of participants for whom you want to capture the conversation. Select the required operator from the **Match messages that have** dropdown list and enter the number of participants in the check box.
7. If you have updated the Teams policy, click **Apply > OK**.

Configuring an Importer

The importer downloads Microsoft Teams data to Veritas Enterprise Vault.

Prerequisite

- Ensure that the connection to configure the importer is available in Enterprise Vault under **Targets > Microsoft 365 > Connections**.
- Ensure that the holding folder in the Enterprise Vault server is available to receive the Microsoft Teams data. The holding folder path must be a local path on the Enterprise Vault server. The holding folder must be a shared folder so that the Merge1 server has access to it.
- Be aware of the log folder path of the Merge1 server where the Merge1 importer logs are written. The log folder path must be a local path on the Merge1 server.

Note: If the Merge1 administrator and Enterprise Vault Service Account user are different, add the Enterprise Vault Service Account user in the Local Administrator Group on the Merge1 server.

Note: If a user logs on to the Enterprise Vault server using the Microsoft 365 Administrator or Power Administrator RBA role, in that case these RBA role accounts must be the part of Local Administrator group on the Merge1 server.

- Ensure that the Merge1 server administrator user that you are using for configuring Teams archiving has been added in the local administrator group on the machine where the holding folder exists.
- Be aware of the Vault Store that you want to use for the importer.
- It is recommended that you use the Enterprise Vault Service account for your Merge1 server installation and configuration. However, if you have already installed and configured the Merge1 server with another account, you can use that account. You are recommended to add the following permissions for the Merge1 Importer Service account on the Merge1 server:
  - Local Administrator (must be a member of the Administrators' group)
  - Log on as Service rights
  - Log on as a batch job rights

Note: Active Directory admin should not restrict the Enterprise Vault Service Account to have these permission on Merge1 server where It is used to the Run Importer as the windows service.

- Ensure that the teams domain is added to the list of internal SMTP domains for marking correct message direction (internal or external). Navigate to **Site Properties > Advance > SMTP > List of internal SMTP domains** to add the teams domain.

Note: For collecting legacy data and daily data, it is recommended that you create two separate importers. To collect both legacy data and daily data, the administrator must manually start the Teams Archiving Task. For legacy data collection, the administrator must allow the importer download data for a few days and then start the Teams Archiving Task either in the **Run now** or **Schedule** mode. For more information about the **Run now** and **Schedule** modes, see Managing Teams archiving tasks.

About Holding Folder

The holding folder is the folder where Merge1 will dump the Microsoft Teams data and Enterprise Vault pick that data for the archiving.

The holding folder path must comply with the following conditions:

- The folder is recommended to be on a local drive to the EV Server.
- The folder should be excluded from virus scanning. Scanning the holding folder can cause the corruption of items, performance issues, and data loss.
- The folder must be a shared folder and must be specified in UNC path format where-ever asked.
- The maximum permitted length of folder path is (140 - importer's Name length) characters.

Configure holding folder on a server other than the Enterprise Vault server

1. The machine to be configured for holding Teams chat data must be in the same domain as that of Enterprise Vault.
2. Provide shared access to the holding folder for the Vault Service account (VSA) administrator created on a server other than Enterprise Vault.
3. Perform one of the following actions to grant required permissions to the VSA administrator on the holding folder:
   - Add the VSA administrator to the local administrator group and ensure that the local administrator group has full control permission (for sharing and security) on the holding folder.
     Or,
   - Provide the VSA administrator full control permission (for sharing and security) on the holding folder.
4. Add **Domain\VSA administrator** as Identity user in **IIS Manager in Enterprise Vault > Application pool > Merge1WebHookPool > Identity**.
5. Set Application pool identity in **IIS Manager of Enterprise Vault > Sites > Enterprise Vault > Merge1WebHook > Authentication > Anonymous Authentication > (edit)**.
6. While creating importer in the Enterprise Vault Administration Console, enter the shared folder path by copying and pasting it in the **Holding folder** field.

This configuration allows notification requests to be received correctly from the Merge1 server to the Enterprise Vault server and the chat items segregation process is triggered successfully.

Configure holding folder when the Merge1 server is installed with non-VSA Administrator

- Installing the Merge1 server with the Merge1 server Administrator user instead of Enterprise Vault Service Account user, sets the Merge1 Server administrator user in the application pool of Merge1 Server. That is:
  IIS Manager > Application pools > Merge1WebAppPool
- The service account set for an importer, which is created from the Enterprise Vault Admin Console is Domain\VSA administrator.

In this scenario, assign the Merge1 Server Administrator and Domain\VSA administrator full control permission (for sharing and security) on the holding folder while creating the importer.

Add the Domain\VSA administrator user to the local administrators group on the Merge1 server.

This configuration allows notification requests to be received correctly from Merge1 server to Enterprise Vault server and chat items seUse the Vault Service accountgregation process is triggered successfully.

To create an importer

1. In the left pane of the Enterprise Vault Administration Console, click **Targets > Microsoft 365 > Importers**.
2. To create a new importer, right-click on **Importers** and select **New > Importers**.
3. In the **New Importer** wizard, click **Next**.
4. Enter the following details in the corresponding text boxes and click **Next**:
   - Enter an appropriate and unique name for the new importer.
   - Enter an appropriate description for the new importer.
5. Select the account under which the importer will run.
   - **Use the Vault Service account**: Select this option if you want to configure the Vault Service account as the user account for the importer service account. Then, click **Next** and enter the password of the Vault Service account.
   - **Use this account**: Select this option if you want to configure the importer service account with a user account other than the Vault Service account. From the **Account name** drop-down list, select the user or browse for the domain user account, and enter the password in the **Password** and **Confirm password** fields. Click **Next**.

   The selected user account must have the following permissions:

- Local Administrator (must be a member of the Administrators' group) on the Enterprise Vault server
- Local Administrator (must be a member of the Administrators' group) on the Merge1 server
- Log on as Service rights on the Merge1 server
- Log on as a batch job rights on the Merge1 server
- db_owner of the Merge1 database

6. Select the following and click **Next**:
   - **Microsoft 365 connection**: From the dropdown list, select connection.
   - **Holding folder**: Select the Microsoft Teams holding folder path to receive the Microsoft Teams data
   - **Log folder**: Select the location of the log folder of the Merge1 server where the Merge1 importer logs are written.
7. Specify the users whose data will be collected by the importer:
   - To collect data for all users, select **All users**.
   - To collect data for specific users, select **Manually maintain the list**.
     To manually enter email IDs and display names of specific users, click **Add** and enter the user details. Click **OK**.
     To import specific users from a CSV file, click **Import** and select the CSV file. Click **Open**.
     Entries in the CSV file should be present in the following format:
     <Email Address1>,<Username1>
     <Email Address2>,<Username2>
     ...
     ...
8. Click **Next**.
9. Specify the Date Range for which importer will collect the Microsoft Teams data.
   - **All Time**: Select this option to collect the Microsoft Teams data for all the time without any date filter criteria. It will continuously keep on collecting the Microsoft Teams data whenever data is available.
   - **Date Based**: Select this option to collect the Microsoft Teams data for the specific date range. If you select this option, you must select at least one of the checkboxes - **Collect data generated after** and **Do not collect data generated after** - to specify the date range for data collection.

- **Collect data generated after**: Select this option to collect the Microsoft Teams data from a specific date only. Team data prior to this date will not be collected.
- **Do not collect data generated after**: Select this option to collect the Microsoft Teams data up to a specific date only. Microsoft Teams data after this date will not be collected.

Note: Once data for the specific date range is collected we cannot collect the data prior to this date range by modifying it from the importer's properties. Importer will always collect the data from the date where it last collected the data.

---

10. Click **Next**.
11. Select the following:
    - The Teams policy that you want to apply on the importer.
    - The retention category that you want to use for the importer.
12. Click **Next**.
13. Select the Vault Store that you want to use for the importer.

Note: The Microsoft Teams Archive and the Teams Archiving Task for the importer are created on the same machine where the Vault Store is present.

---

14. Review the new importer configurations and click **Finish**.

To view and update importers

1. In the left pane of the Enterprise Vault Administration Console, click **Targets > Microsoft 365 > Importers**.

   The right pane of the Administration Console displays the available importers.
2. Right-click on an importer to perform the following actions:
   - **Enable**: Allows you to enable the importer.
   - **Disable**: Allows you to disable the importer. This is needed to modify the importer’s properties and to delete the importer.
   - **Run Now**: Allows you to run the importer, which will collect the Microsoft Teams data.
   - **Delete** Allows you to delete the importers. Importer should be in the disabled state to perform this operation.

- **Properties**: Allows you to view and update the importer properties. You can double-click on an importer to view and update the properties. For updating the importer properties, importer must be in disabled state. For more information, see the steps below.

3. To update an importer, double-click on it.

Note: If you want to update an importer, ensure that the importer is in the disabled state.

The importer properties dialog box is displayed and contains the following tabs:

- **General**: The **Details** section displays the importer name, description, status, and the Teams archiving task associated with the importer.
  The **Settings** section displays the Teams archive name and the Teams policy applied on the importer. You can update the settings, if required.
  The **Retention** section displays the retention category. You can update the retention category settings, if required.
- **Service Account**: Displays the user account for the importer service account. You can update the service account, if required.
  - **Use the Vault Service account**: Select this option if you want to configure the Vault Service account as the user account for the importer service account. Then, click **Next** and enter the password of the Vault Service account.
  - **Use this account**: Select this option if you want to configure the importer service account with a user account other than the Vault Service account. From the **Account name** drop-down list, select the user or browse for the domain user account, and enter the password in the **Password** and **Confirm password** fields. Click **Next**.

  The selected user account must have the following permissions:
  - Local Administrator (must be a member of the Administrators' group) on the Enterprise Vault server
  - Local Administrator (must be a member of the Administrators' group) on the Merge1 server
  - Log on as Service rights on the Merge1 server
  - Log on as a batch job rights on the Merge1 server
  - db_owner of the Merge1 database

- **Connection and Folders**: The **Connection** section displays the available connections with the Merge1 server on which the importer has been created. You can update the connection, if required.

  The **Holding folder** section displays the path of the Microsoft Teams holding folder which receives the Microsoft Teams data from the Merge1 server. You can update the holding folder path, if required. Before updating the holding folder location for the importer, perform the following steps:

  Step 1: In the Enterprise Vault Administration Console, stop the importer's Teams Archiving task.

  Step 2: Copy the existing content of the current holding folder tree to the new location.

  The **Log folder** section displays the path of the log folder of the Merge1 server where the Merge1 importer logs are stored. You can update the log folder path, if required.

- **Monitored Users**: Specify the users whose data will be collected by the importer:

  - To collect data for all users, select **All users**.
  - To collect data for specific users, select **Manually maintain the list**.

    To manually enter email IDs and displays names of specific users, click **Add** and enter the user details. Click **OK**.

    To import specific users from a CSV file, click **Import** and select the CSV file. Click **Open**.

    Entries in the CSV file should be present in the following format:

    <Email Address1>,<Username1>

    <Email Address2>,<Username2>

    ...

    ...

- **Date Range**: Specify the Date Range for which importer will collect the Microsoft Teams data.

  - **All Time**: Select this option to collect the Microsoft Teams data for all the time without any date filter criteria. It will continuously keep on collecting the Microsoft Teams data whenever data is available.
  - **Date Based**: Select this option to collect the Microsoft Teams data for the specific date range. If you select this option, you must select at least one of the checkboxes - **Collect data generated after** and **Do not collect data generated after** - to specify the date range for data collection.

- **Collect data generated after**: Select this option to collect the Microsoft Teams data from a specific date only. Team data prior to this date will not be collected.
- **Do not collect data generated after**: Select this option to collect the Microsoft Teams data up to a specific date only. Microsoft Teams data after this date will not be collected.

Note: Importer will always collect the data from the date where it last collected the data.

- **Schedule**: The configurations to schedule running of the importer.
  The Interval section allows you to select 1 hour or 15 minutes to schedule running of the importer.
  You can also select specific time slots on specific days of the week to schedule running of the importer by clicking on the time scheduler at the bottom of the dialog box.
- **Advanced**: Displays the batch size of the Merge1 notifications. The batch size of the number of copied files initiates Merge1 to send notifications to Enterprise Vault. The default batch size is 50.
  Click **Modify** if you want to change the existing batch.

4. Click **Apply > OK**.
5. If you have updated the holding folder location, perform one of the following actions:
   - Restart the Merge1WebHookPool in the IIS Manager application pools. Or,
   - Restart the IIS server.
6. Enable the importer.
7. Start the corresponding Teams Archiving task.

Managing Teams archives

1. In the left pane of the Enterprise Vault Administration Console, click **Archives > Teams**.

   The right pane of the Administration Console displays the available Teams archives. By default, the name of the Teams archive has the same name as the Importer name.
2. Right-click on an archive to perform the following actions:

Field	Actions
Search archive	Allows you to search for archived Teams items.
View expiry report	Allows you to view the expiry report of archived Teams items.
Delete	Allows you to delete an archive.
Properties	Allows you to view and update the archive properties. You can double-click on an archive to view and update the properties. For more information, see the step below.

3. If you want to update a Teams archive, double-click on the archive.

   The Teams archive properties dialog box is displayed and contains the following tabs:

Tab	Details
General	Allows you to: ■ View and rename the Teams archive. ■ View the details of the Teams archive, such as site, vault store, and so on. ■ The Administrative note sections allows you to add any note.
Permissions	Allows you to: ■ Control access of users and groups to the archive. ■ Select users and groups to which permission is to be granted or denied for accessing the archive.
Indexing	Allows you to: ■ Select indexing level of the archive. ■ View configured archiving dates.
Advanced	Allows you to: ■ View and set archive deletion settings. ■ View the archive ID. ■ View the archive type ID.

Tab	Details
Archive Usage limit	Allows you to control the maximum size of the archive. You can set a limit for the archive, inherit the setting from the site properties, or the Vault Store properties.
Index Volumes	Allows you to: ■ View the available index volumes. ■ View the health of the index volumes. ■ Upgrade, verify, synchronize, rebuild, and change location of the index volumes for the Enterprise Vault archives.
Deleted Items	Allows you to recover items marked for deletion from the archive.

4. Click **Apply > OK**.

Managing Teams archiving tasks

1. In the left pane of the Enterprise Vault Administration Console, click **Enterprise Vault Servers > Tasks**.

   The right pane of the Administration Console displays the available Teams archiving tasks.

2. Right-click on an archive to perform the following actions:

Field	Actions
Start	Allows you to start the Teams archiving task.
Stop	Allows you to stop the Teams archiving task.
Restart	Allows you to restart the Teams archiving task.
Pause	Allows you to pause the Teams archiving task.
Resume	Allows you to resume a paused Teams archiving task.

Field	Actions
Run Now	Allows you to immediately run the Teams archiving task.
Delete	Allows you to delete the Teams archiving task.
Properties	Allows you to view and update the archiving task properties. You can double-click on an archiving task to view and update the properties. For more information, see the step below.

3. If you want to update a Teams archiving task, double-click on the task.

   The Teams archiving task properties dialog box is displayed and contains the following tabs:

   - **General**: The **Details** section allows you to:
     - View the archiving task site name.
     - View the name of the machine on which the archiving task exists.

     The **Settings** section allows you to view and update the archiving task startup type. The available startup options are:
     - Automatic
     - Manual
     - Disabled

     The **Administrative note** sections allows you to add any note.
   - **Scheduled**: The configurations to schedule running of the archiving task.
     Select the **Use site setting** checkbox to schedule running of the archiving task based on the site setting. Selecting the checkbox, disable other scheduling settings. By default, the **Use site setting** checkbox is not selected.
     If you want to schedule running of the archiving task based on configurations other than the site settings, clear the **Use site setting** checkbox.
     In the **Run** section:
     - Select **Never** to prohibit the archiving task to run on its own.
       Click **Run Now** to immediately run the archiving task.
     - Select **At selected times** to configure running of the archiving task at specific intervals, in specific days and time-slots.

Configure the settings from the **Interval** section and time and date picker section. Click **Run Now** to immediately run the archiving task.

4. **Reports**: Allows you to configure the archiving report settings.

   See "About Teams archiving task reports" on page 36.

5. **Advanced**: Allows you to configure the following archiving task advanced settings
   - **Converted chat folder path for Teams archiving task**: Path of the converted chat folder. Path must be a valid folder path.
   - **Broken chat folder path for Team archiving task**: Path of the broken chat folder. Path must be a valid folder path.
   - **Ignore items in the current date folder when processing items from the segregation folder**: Determines if the current date folder must be processed or not when processing items from the segregation folder. By default, the Teams archiving task ignores the current date folders.
     - **1**: Ignore current date folders in the segregation folder.
     - **0**: Do not ignore current date folders in the segregation folder.
6. Click **Apply > OK**.

Updating the converted chat or broken chat folder path

You can update the converted chat or broken chat folder path if required. Perform the following actions to update the converted chat or broken chat folder path:

1. From the Enterprise Vault Administration Console, stop the importer and the Teams archiving task corresponding to the importer.
2. Copy the existing content of the current holding folder tree to the new location.
3. Set the new folder path in the Teams Archiving Task Properties: Advanced page.
4. Perform one of the following actions:
   - Restart the Merge1WebHookPool in the IIS Manager application pools. Or,
   - Restart the IIS server.
5. Start the importer and Teams archiving task corresponding to the importer.

About Teams archiving task reports

When a Teams archiving task runs as per its schedule, or with the **Run Now** option, it creates a report with the details of the run.

Teams archiving task reports are created at following location:

```
<Enterprise Vault Install Path>\Enterprise Vault\Reports\Teams
Archiving
```

Following is a sample of the Teams archiving task report:

```
Archive run started at 11/11/2021 3:26:04 PM for the Teams archiving
task 'TEAMS ARCHIVING TASK FOR IMPORTER NAME'

Task Started : 11/11/2021 3:26:04 PM

Task Finished : 11/11/2021 3:26:20 PM

Elapsed Time : 00:10:15 (hh:mm:ss)

Total number of TeamsRoomChat in the segregation folder: 92318

Total number of TeamsRoomChat processed: 10

Total number of TeamsRoomChat archived: 10

Total Number of TeamsRoomChat failed to convert: 0

Total number of TeamsRoomChat failed to archive: 0

Total number of TeamsRoomChat marked as broken: 0

Total KB archived: 9867 KB
```

Note: If the Teams archiving task run does not find any files to process and archive, then it adds following note in the report.

NOTE: The Teams archiving task did not find any files to process and archive in the `\\SERVERNAME\c$\HoldingSharedFolder\ImporterName\ChatSegregated`. This could happen when there is no data available from Microsoft Teams for archiving. Ensure that the Merge1Webhook under the Veritas Enterprise Vault website is running and the Importer is dumping data into the holding folder.

About Teams archiving tasks performance counters

The task provides following counters to monitor the performance of the archiving process.

Counter	Description
Teams Room Chat Archived	Number of chat rooms data converted from .json to .eml and archived successfully.

Counter	Description
Teams Room Chat Failed To Archive	Number of chat rooms data converted from .json to .eml but failed to archive.
Teams Room Chat Failed To Convert	Number of chat rooms data that failed to convert from .json to .eml.
Teams Room Chat Items In Queue	Number of chat items yet to be processed.
Teams Room Chat Marked As Broken	Number of chat rooms data successfully converted from .json to .eml and added to BrokenChatHolding folder.
Teams Room Chat Processed	Number of chat room processed.