

INTRODUCTION

This section includes the following topics:

- [Overview](#)

Overview

Overview

Insight Capture aids financial service firms in complying with SEC rule 17-a4, CFTC rule 1.31, Dodd-Frank requirements, FINRA and other regulatory agencies. It also greatly reduces legal risks by streamlining the discovery of e-communications data, aiding organizations across all verticals with internal investigations, lawsuits, and audits.

Collectors can be used for targeted discovery within limited time frames using the Do not download data modified before and Do not download data modified after windows, provided the data exists at source. This should be done by creating a second copy of the original steady-state importer and using that for targeted runs.

“ ”

Note: Insight Capture collectors are designed to be deployed for scheduled ongoing capture runs. Even though collectors can be run against older data for targeted discovery purposes, using the collectors to migrate large amounts of data is not supported. The Capture platform is not built as a migration tool designed to run long term migration tasks with accompanying monitoring/reconciliation/reporting features that are required for such a tool. Running tasks for long periods of time brings the risk of failure to complete successfully.

“ ”

DASHBOARD

This section includes the following topics:

- [Overview](#)
- [Importer Jobs](#)

Overview

The Dashboard provides interactive visual modules that represent statistical and logical information about your activities.

The screenshot displays the Arctera Insight Management Console Dashboard. The main content area is titled 'DASHBOARD' and provides a summary of capture activities. It features a table of 'IMPORTER JOBS' with the following data:

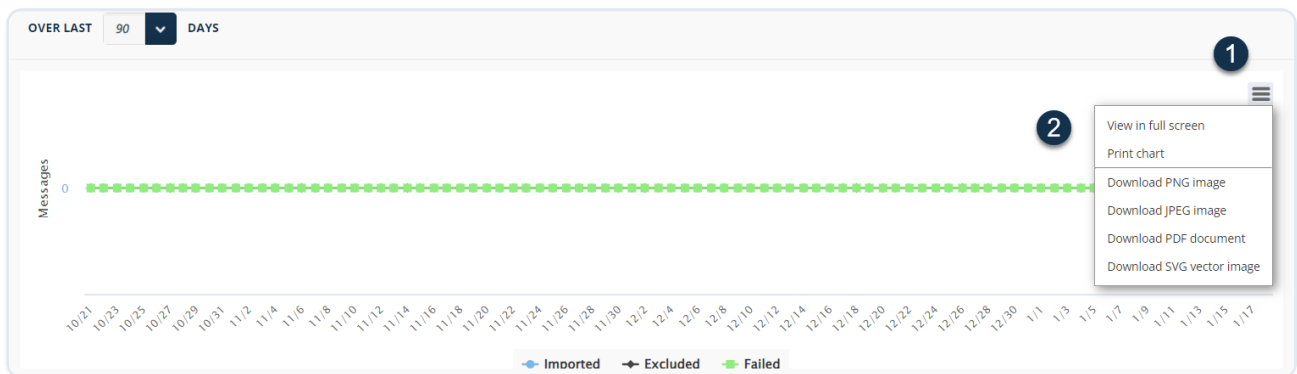
DATE	SESSION ID	IMPORTER	QUARANTINED ...	IMPORTED MESS...	FAILED MESSAGES
07/19/2025	58745	Bloomberg Test Support	0	0	0
07/18/2025	58736	Bloomberg Test Support	0	0	0
07/17/2025	34324	Sharepoint EV	0	0	7
07/17/2025	58734	Bloomberg Test Support	0	0	0
07/17/2025	58733	Zoom via archiving API in EV	0	0	0
07/17/2025	24033	Zoom via archiving API in EV	0	0	1
07/17/2025	10974	Zoom via archiving API in EV	0	0	1
07/17/2025	10980	Zoom via archiving API in EV	0	0	1
07/17/2025		Zoom via archiving API	0	0	1

The dashboard also includes a 'MONITORED USERS BY SOURCE TODAY' section which currently displays 'NO ITEMS TO DISPLAY'. At the bottom, there is a section for 'MESSAGES PROCESSED BY ARCTERA INSIGHT CAPTURE' showing 'OVER LAST 7 DAYS'.

Dashboard consists of the following screens:

- [Importer Jobs](#)
- [Monitored Users by Source](#)
- [Messages Proceeded by Arctera Insight Capture](#)
- [Number of Messages by Importer](#)

You can view the details of each job, user, or messages by hovering the mouse over the job you want, and you will see the details of it.



You can download the information included in the Messages Proceeded by Arctera Insight Capture and Number of Messages by Importer in PDF, JPG, PNG or SVG formats. A pop-up list of available formats opens.

Select the format and the dashboard of the messages or the number of messages by importers will be downloaded to your local PC.

Importer Jobs

The paragraphs that follow will describe how you can browse and set the number of entries per page in the importer jobs.

This dashboard is comprised of the following components:

- Date
- Session ID
- Importer
- Quarantined sources
- Failed messages
- Imported messages
- Reprocessed session
- Duration

“ ”

Note: The importer's duration will not be displayed if the job is interrupted or stopped before completion. **Note:** You can drag and re-arrange their order in the User interface.

“ ”

Exporting to CSV

This section allows the user to export the dashboard for:

- The specified importer by selecting the collector from the Collectors list drop-down list
- The specified date range by selecting FROM and TO dates from the calendar

The screenshot shows the 'Capture' dashboard with the 'DASHBOARD' section. The 'IMPORTER JOBS' table is displayed with columns: DATE, SESSION ID, IMPORTER, QUARANTINED, IMPORTED MESS..., and FAILED MESSAGES. A dropdown menu is open over the 'IMPORTER' column, showing options: Columns, Date, Session Id, Importer, Quarantined Sources, Imported Messages, Failed Messages, and Reprocessed Session. The 'EXPORT TO CSV' button is visible in the top right of the table area. The table shows data for sessions from 07/15/2025 to 07/01/2025, all imported by '1Drive'. The 'MONITORED USERS BY SOURCE TODAY' section shows 'NO ITEMS TO DISPLAY'. The 'MESSAGES PROCESSED BY ARCTERA INSIGHT CAPTURE' section shows 'OVER LAST 7 DAYS'.

Browsing Importer Jobs & Setting the Number of Entries per Page

This sub-section is enhanced with the pagination option. This means that it is enabled with the possibility of splitting the list of records in the sub-section into pages for paged navigation.

By default, each sub-section is set to display twenty entries per page to ensure fast page loading. However, you can define to view a lower/greater number of entries per page.

Capture

DASHBOARD

Below are some quick metrics regarding your Arctera Insight Capture activities.

IMPORTER JOBS		COLLECTORS LIST	ALL	DATE RANGE	month/day/year	month/day/year	EXPORT TO CSV
DATE	SESSION ID	IMPORTER	QUARANTINED ...	IMPORTED MESS...	FAILED MESSAGES		
07/15/2025	58723	1Drive	0	1,974	0		
07/15/2025	34677	1Drive	0	0	4		
07/15/2025	34308	1Drive	0	0	1		
07/08/2025	58682	1Drive	0	1,976	0		
07/08/2025	34677	1Drive	0	0	4		
07/08/2025	34308	1Drive	0	0	1		
07/01/2025	58640	1Drive	0	1,975	0		
07/01/2025	34677	1Drive	0	0	4		
07/01/2025	34308	1Drive	0	0	1		

<< | < 1 2 3 4 5 6 7 8 9 10 ... > | >> 10 items per page 1 - 10 of 12455 items

IMPORTERS

This section includes the following topics:

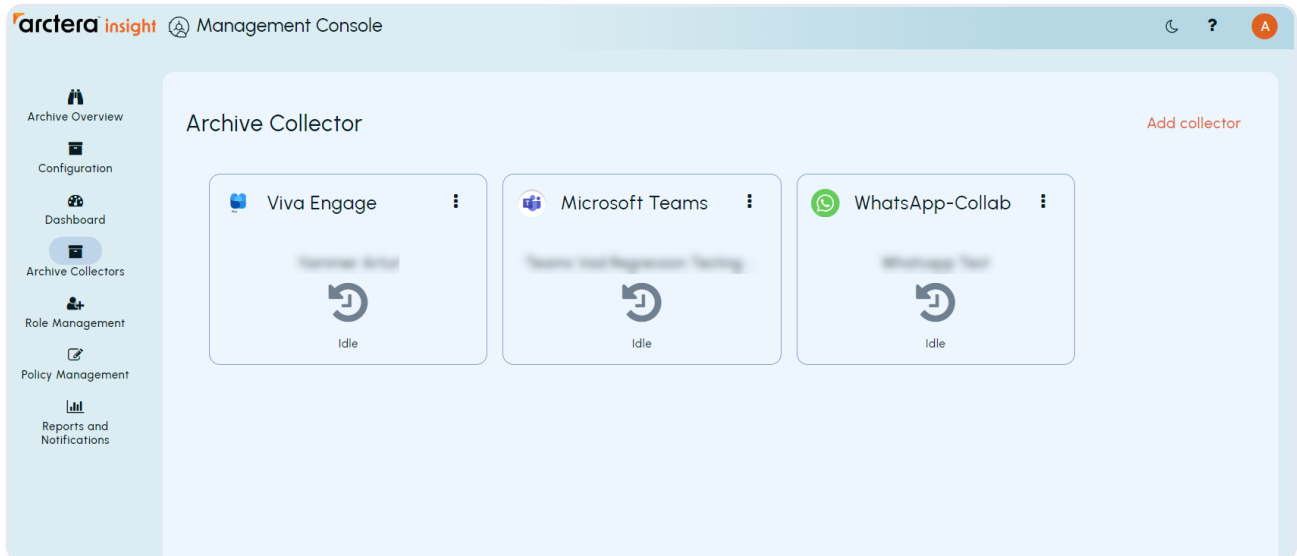
- [Adding a New Importer](#)
- [Managing an Importer](#)
- [File-Based Collector Options](#)
- [Amazon S3](#)
- [Audio Video](#)
- [BlackBerry](#)
- [Bloomberg](#)
- [Box](#)
- [CellTrust](#)
- [Chatter](#)
- [Chatter Cipher Cloud](#)
- [Cisco Webex Teams](#)
- [Citrix Workspace & ShareFile](#)
- [Cloud9](#)
- [Copilot](#)
- [Dropbox Business](#)
- [Dubber Speik Recordings](#)
- [Dubber Speik SMS](#)
- [EML](#)
- [EWS](#)
- [Exchange Graph API](#)
- [FX Connect](#)
- [Google Drive](#)
- [IceChat](#)
- [iMessage](#)

- JSON
- LSEG (Refinitiv)
- Microsoft Teams
- Microsoft Teams for Audio and Video
- Microsoft Teams via Webhooks
- NTR-X
- OneDrive for Business
- Pivot
- Redtail Speak
- RingCentral
- ServiceNow
- SharePoint
- Slack eDiscovery
- Symphony
- Text-Delimited
- X (Twitter)
- UBS
- Web Page Capture
- WhatsApp
- Workplace from Facebook
- XIP
- XSLT/XML
- Verba
- Verint
- Viva Engage (Yammer)
- Yieldbroker
- YouTube
- Zoom Chat
- Zoom Meetings
- Zoom Meetings Chats

- Zoom Meetings via Archiving API
- Zoom Phone

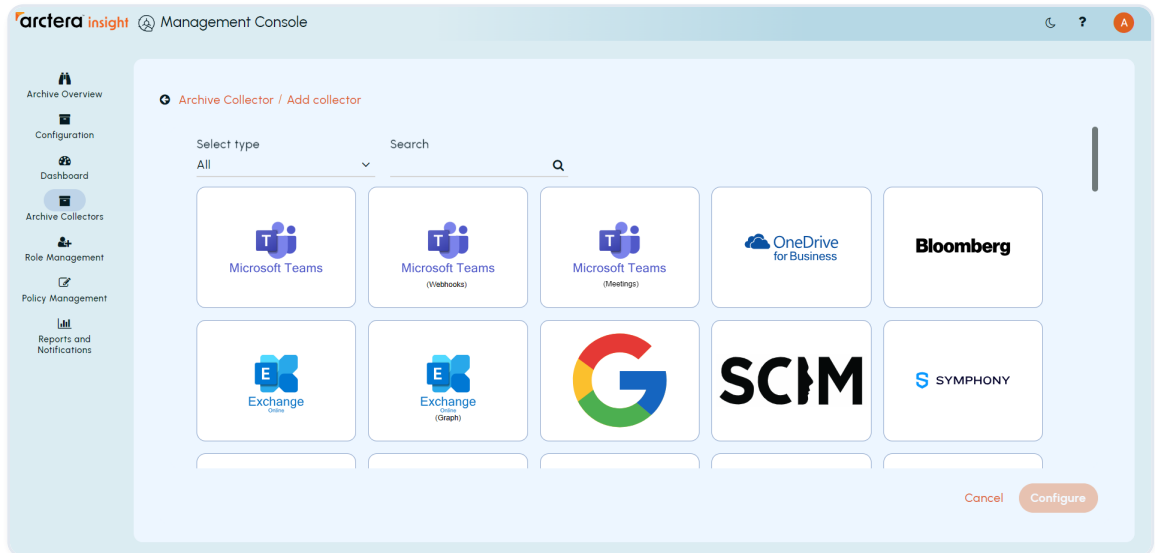
Adding a New Importer

You will see a blank page or the list of already configured collectors.

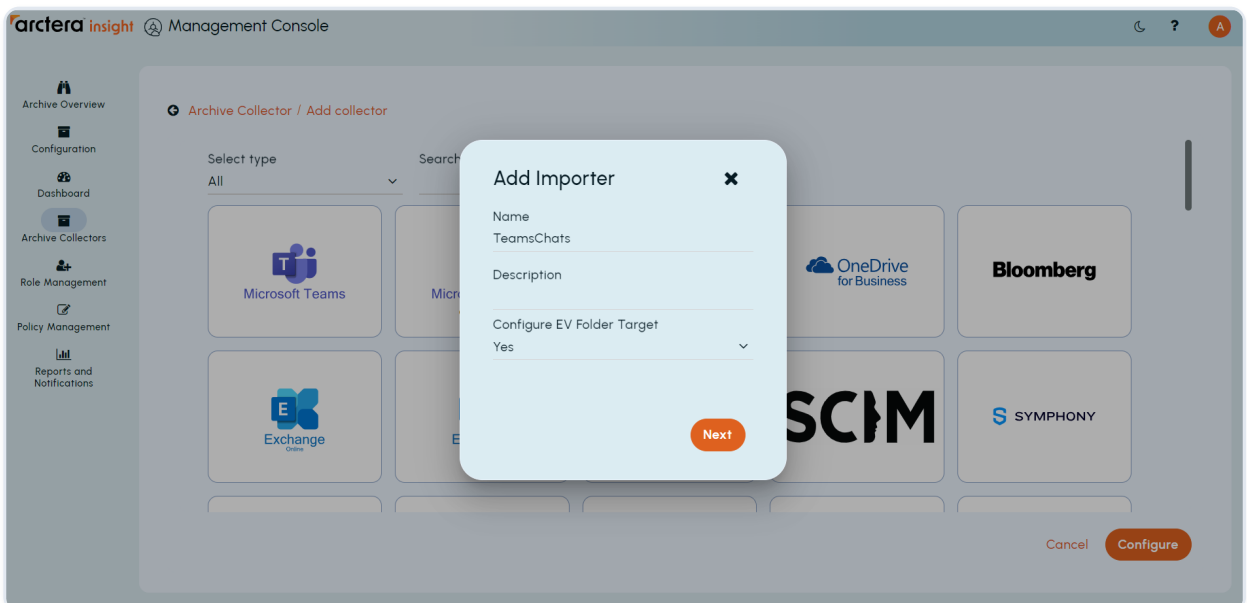


To add a new importer:

1. Click the Add collector button on the top left corner. A configuration wizard of adding a new importer will appear.
2. Select your source and click Configure. Here you can make use of:
 - Searching option - type the name of the source in the search box located above the sources:
 - Filtering option - select one of the following source types from the drop-down list above the sources:
 - Collaboration
 - Enterprise tools
 - File sharing
 - Financial platforms
 - Mobile and text
 - Voice
 - Others



- Fill in the Name and the Description fields, choose whether you want to deliver the collected data to EV folder target, and click NEXT.

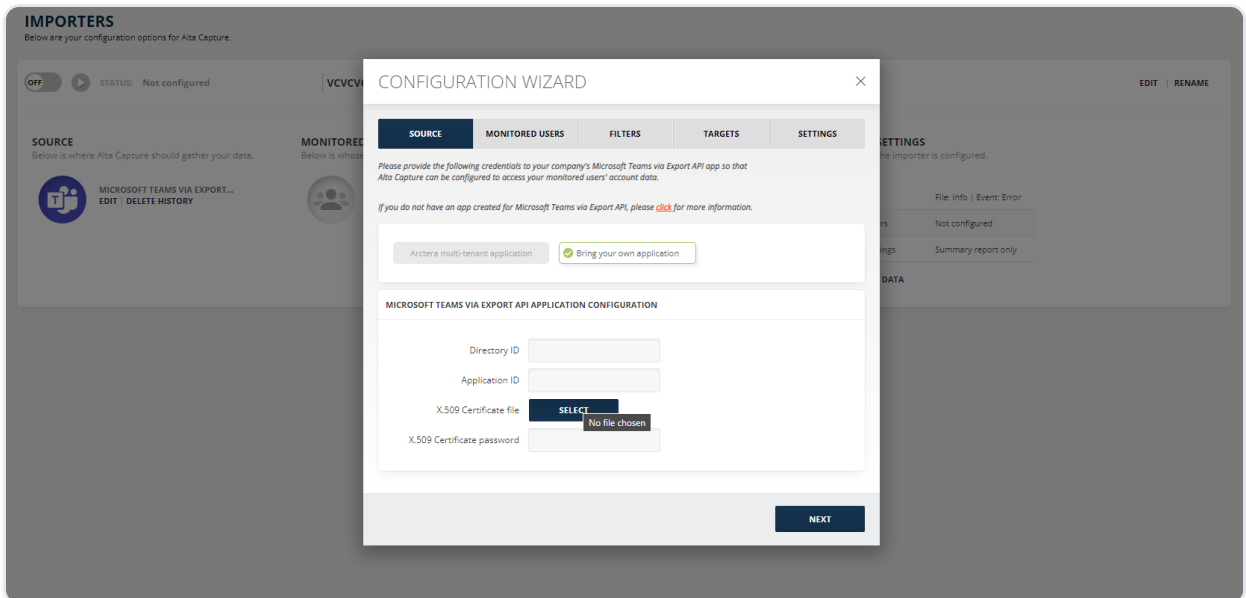


- Make the necessary changes.

“ ”

Note: From collector to collector the Source tab may vary.

“ ”



When integrating an Importer, the Importer Panel is added to the Configuration Screen. Each Importer Panel consists of five main tabs:

- Source \- here you can find general information about the importer and edit it.
- Monitored Users \- here you can find information about all the users of the collector monitors, and its configurations.
- Filters \- here you can set up what information is sent to the target.

“ ”

Note: Filters are not applicable to the EV folder target.

“ ”

- Targets \- here you can set up where the collector information is sent to.
- Settings \- here you can change all the importer configurations.

“ ”

Note: It is necessary to configure all the tabs of the Configuration Wizard and **SAVE** the settings. When saved, you'll be redirected to the archive collectors list.

“ ”

Managing an Importer

The options for managing the importers are:

- Manage - allows editing the settings of the collector.
- Delete - deletes the importer.
- Stop - stops the importer.
- Run Now - changes the importer status from stopped/idle to running.
- Refresh - refreshes the importer.
- Clone - allows copying the importer with all the previously configured settings.
- Rename - allows changing the name and the description of the importer.
- Delete Collector Data - deletes the data associated with the selected importer.

File-Based Collector Options

This section describes how file-based collectors are generally configured.

File Source Configuration

There are the following options to configure the source:

- SFTP/FTP
- Amazon S3
- Azure Storage

FILE SOURCE

SFTP/FTP

Amazon S3

Azure Storage

“ ”

Note: It is possible to configure the volume and size limits of the downloaded files. For further guidance, reach out to Arctera Support.

“ ”

In case SFTP/FTP configurations is selected:

For Connection:

1. Enter the hostname of the remote FTP server and the folder path provided by the source in the Host and Path fields, respectively. The default ports used for SSH key Authentication by Bloomberg, IceChat, and Redtail Speak collectors is 22. The default FTP port for any Source is 21.

CONNECTION

Use SSH key authentication

Host * Port *

Path *

Connection type ▼

Use security

Implicit SSL

Explicit SSL

SSH

AUTHENTICATION

Anonymous access

Username *

Password *

TEST CONNECTION

2. Make sure the connection settings match those of the SFTP server. Enter the Path to the required folder.

3. Enable Use SSH Key Authentication to open the configuration window. SSH Key Authentication is used for connecting to the source SFTP server.
4. For Authentication, enter the Username provided by the source.

The screenshot shows a configuration window with two main sections: CONNECTION and AUTHENTICATION.

CONNECTION

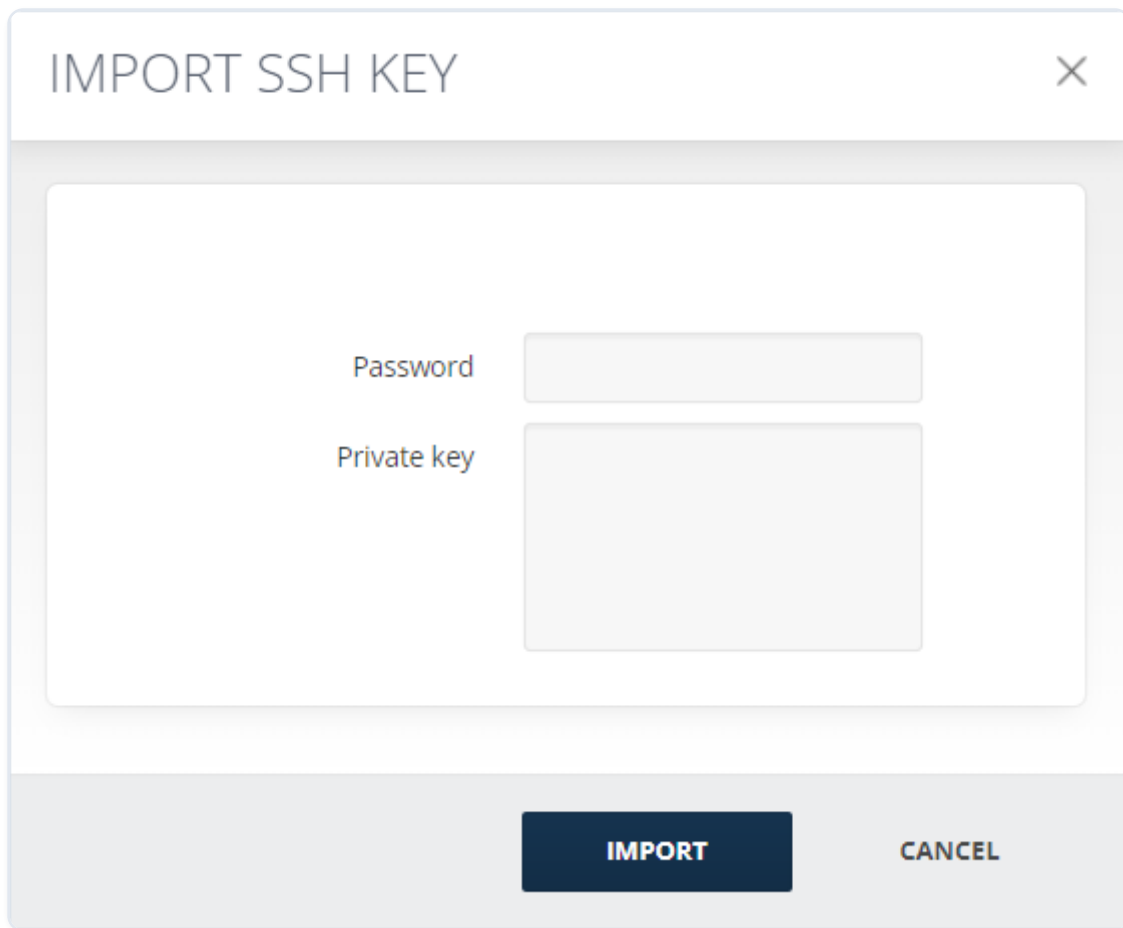
- Use SSH key authentication
- Host * [text input field]
- Port * [text input field with value 22]
- Path * [text input field]

AUTHENTICATION

- Username * [text input field]
- Public key * [text area]
- Import private key [text input field]

Buttons: **TEST CONNECTION** and **IMPORT PRIVATE KEY**

5. Click the Import Private Key button and Import SSH Key will open.
6. Copy and paste the Private Key.



IMPORT SSH KEY

Password

Private key

IMPORT CANCEL

7. Enter Password.
8. Click Import and the Public Key field will be populated automatically.
9. In case you enable Use Security, select FTP connection type from the Connection Type drop-down list. FTP can run in either passive or active mode. The information about the connection type should be provided by the FTP host. If you wish to use FTP over SSL, enable the Use Security checkbox and choose the connection method Implicit SSL, Explicit SSL or SSH.
10. Enter the Username and Password fields provided by the source.
11. Click Test Connection. If the connection is successful, a green check sign is displayed.
12. To enable anonymous FTP connections, enable the Anonymous Access checkbox which is the default settings.

AUTHENTICATION

Anonymous access

Username *

Password *

TEST CONNECTION

To capture data from Amazon S3, triggers and a Lambda function need to be created on the Amazon S3 site. The trigger is run when specific actions occur within a bucket and the source bucket items with their metadata are imported to the archive bucket. the data from the archive bucket are captured.

If the Amazon S3 source is selected, the Amazon S3 Configuration window will open.

AMAZON S3 CONNECTION

Access key *

Secret key *

Bucket name *

Region endpoint *

TEST CONNECTION

The following information is required:

- Access Key \- enter the access key which you can find in the Users > Security Credentials of your Amazon S3 account.

- Secret Key \- enter the secret key acquired while setting up the Security Credentials. Save it in a secure place as that secret key is provided only once.
- Bucket Name \- enter the archive bucket name.
- Region Endpoint \- enter the Region Endpoint which you can find in the Bucket Overview > Properties of your Amazon S3 bucket. Note that if Region Endpoint is not set correctly, the archive content will not be captured and processed.

Objects	Properties	Permissions	Metrics	Management	Access points
Bucket overview					
Region US East (N. Virginia) us-east-1		Amazon resource name (ARN) arn:aws:s3::[REDACTED]		Creation date September 4, 2020, 20:31:45 (UTC+04:00)	

To capture data stored from different sources in Azure Blob storage, it should be configured accordingly. For more information on how to configure Azure Storage, see the [Configuring Azure Storage](#) section. The stored data will then be capture from the storage.

Using custom domains is not supported, the URL must point to one of the well-known Azure Storage endpoints listed below:

- blob.core.windows.net
- blob.core.usgovcloudapi.net
- blob.core.chinacloudapi.cn

To configure Azure Storage:

1. Enable Connection String and enter the Connection String copied in step 10 of the [Configuring Azure Storage](#) section.

OR,

1. Enable Service SAS URL and enter the Service SAS URL copied in step 10 of the [Configuring Azure Storage](#) section.
2. Enter Blob Container Name from step 11th of the [Configuring Azure Storage](#) section.

AZURE STORAGE CONFIGURATION

CONNECTION

Connection String
 Service SAS URL

Blob Container Name *

TEST CONNECTION

For File Filter a wildcard can be used to denote the file types to be included or excluded. Each type of filter is separated by the vertical pipe character |. For example: *.tar.gz | *.txt.

FILE FILTER

Include
 Exclude

For Filter by Time:


1. If None is selected, the data is not filtered by time.
2. When Only download files modified within the last X days is selected, only the data modified within the mentioned days will be downloaded.
3. When Only download files modified earlier than/after than is selected only the data modified earlier than or later than the mentioned date will be downloaded. Both options can be selected simultaneously to choose a period.


FILTER BY TIME

None

Only download files modified within the last: days

Only download files modified:

Later than 

Earlier than 

For Options:

1. Maintain history of downloaded file for X days (0 = infinite) sets how many days the history of downloaded files will remain. If the number of days is set to 0, the history is maintained forever.
2. If Download subdirectories recursively is checked, files from subdirectories of the mentioned path will be downloaded too.
3. If Delete files on server after downloading is checked, the downloaded files will be deleted from the server.

OPTIONS

Maintain history of downloaded file for days (0 = infinite)

Download subdirectories recursively

Delete files on server after downloading

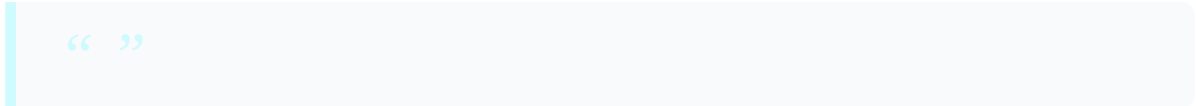
Configuring Azure Storage

For Azure Blob storage:

1. Login to your [Azure portal](#) account.
2. Navigate to Storage Accounts.
3. Click the account Name.

4. On the left side navigation pane, navigate to Shared Access Signature.
5. For Allowed services, enable Blob.
6. For Allowed resource types, enable Container and Object.
7. For Allowed permissions, enable

- Read
- Delete



Note: This is needed in case the 6th step is enabled.



- List
8. For Allowed Blob index permissions, enable Read/Write and Filter.
 9. Specify the Expiration start and end date and click Generate SAS and connection string.
 10. Copy Connection string and Blob service URL for Connection configuration.
 11. On the left side navigation pane, select Containers and click the name of the container you want.


PGP Configurations

For PGP configurations:

1. Enable the Use PGP Decryption checkbox and PGP Decryption Options will be opened.

PGP

Use PGP decryption

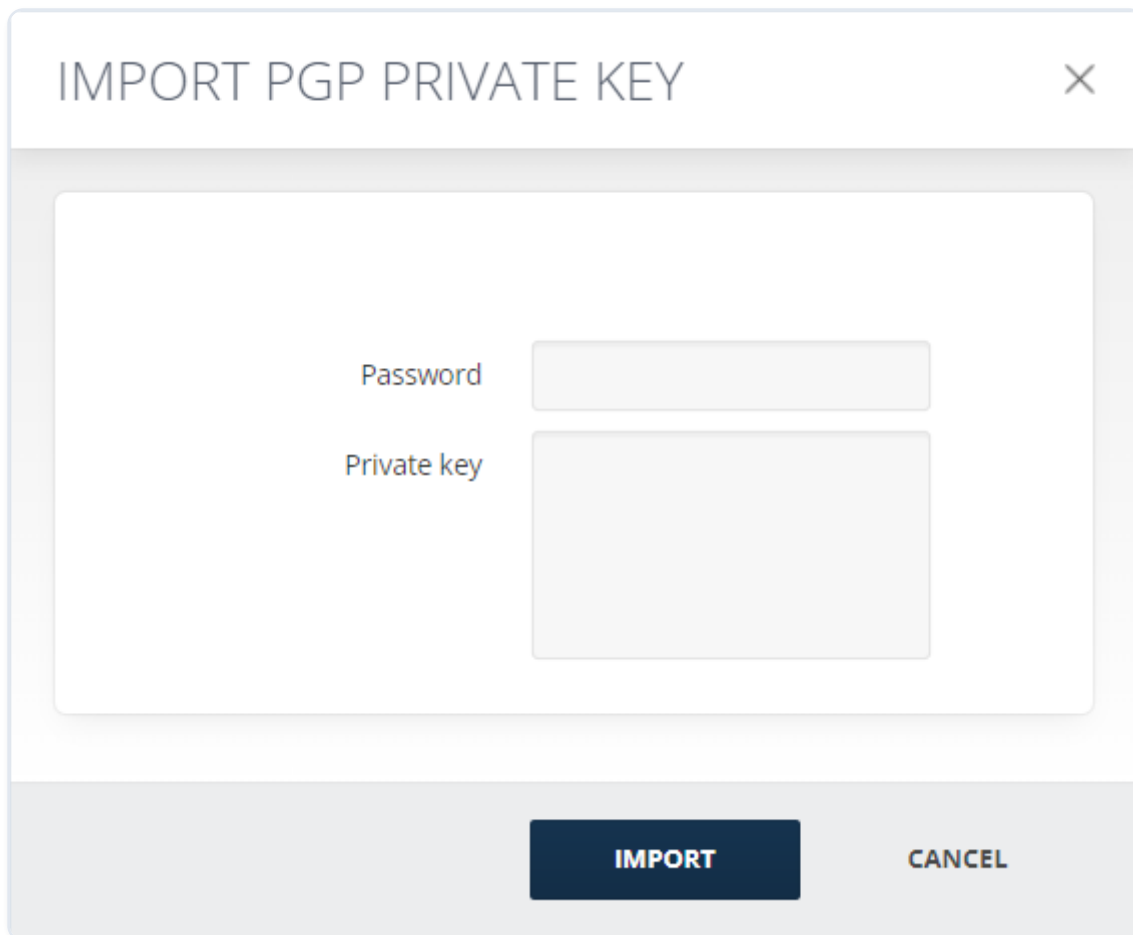
PGP DECRYPTION OPTIONS 

Generated public key *

Import private key

IMPORT PRIVATE KEY

2. Click **IMPORT PRIVATE KEY**. The Import PGP Private Key window will appear.
3. Enter Private Key generated with the key management tool and click Import. .



IMPORT PGP PRIVATE KEY

Password

Private key

IMPORT CANCEL

“ ”

Note: When generating public/private key pairs, it is important to use a reliable PGP key generation tool. Consult with your Security Team to ensure that you are using an approved tool. For instance, Kleopatra is a readily available open-source option. It is important to note that Arctera does not endorse any specific tool.

“ ”

Quarantine Location

This section allows selecting the location of the quarantined files or deleting them. The following options are available:

QUARANTINE LOCATION

- Delete File
- SFTP/FTP
- Amazon S3
- Azure Storage

- Delete files - if selected, quarantined files will be deleted.
- SFTP/FTP - for more information, see SFTP Configuration in [File Source Configuration](#)
- Amazon S3 - for more information, see Amazon S3 Configuration in [File Source Configuration](#)
- Azure Storage - for more information, see Azure Storage Configuration in [File Source Configuration](#)

Miscellaneous Settings

The Subject prefix is added to the subject line of imported emails. This is useful for organizing imported data especially when multiple sources share a common target.

“ ”

Note: Not applicable to the EV Folder target.

“ ”

MISC SETTINGS

Subject prefix

Timestamp Formatting

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 Date Time Format drop-down list.

TIME STAMP FORMATTING

Primary time zone

(UTC-08:00) Pacific Time (US & Canada) (PST) Secondary time zone

Date time format

*March 29 at 09:31 PM***Attachment Validation**

Arctera Insight Capture enables you to develop customized notes for attachment validation. The default setting is Fail Messages with missing Attachments, as a result of which the messages that do not have attachments are failed and can be viewed under the Reports. Note that Advanced Processing should not be selected for this to happen.

If you select the Replace all the attachments with the following note and input your custom note, all the attachments to the messages will not be processed and in their place the input note will be added to the message.

If you select the Replace missing attachments with the following note and input your custom note, all the missing attachments of the messages will not be processed, and you will see only the custom message that you have entered.

ATTACHMENT VALIDATION

Replace all attachments with the following note:

This message contained the following attachments which w

Replace missing attachments with the following note:

This message contained the following attachments that act

Fail messages with missing attachments. (default)

Amazon S3

Amazon S3 is an object storage service that offers industry-leading scalability, data availability, security, and performance. It provides easy-to-use management features so you can organize your data and configure access controls to meet your business, organizational, and compliance specific requirements.

Activities Captured

- Folder activities \- created/renamed
- Files and file operations \- created (upload)/renamed/updated (by uploading another file with the same exact name)

To capture Amazon S3 data, triggers and a Lambda function need to be created on the Amazon S3 site. The trigger is run when specific actions occur within a bucket. And the source bucket items with their metadata are imported to the archive bucket. The collector will then capture the data from the archive bucket.

Notes

- We can upload several files with the same name in File Box. The generated report contains only path info for the uploaded files, which is the same for all the items having the same name. Hence, Arctera Insight Capture attaches the same file (the latest among the ones with the same name) to all the generated messages.
- If files having the same name are downloaded, in all the generated messages we will have the same file attached. The reason for this issue is the same, as for the File upload. If the file is permanently deleted/archived, the activity is not captured.
- In case files are sent via Outlook and the shared information is not recorded in the Citrix environment, the captured message will have an empty body.

Source Configuration

For information on how to configure the following sections of the Source tab, see:

- [File Source Configuration](#)
- [PGP Configurations](#)
- [Quarantine Location](#)
- [Miscellaneous Settings](#)
- [Timestamp Formatting](#)

Advanced Configuration Options

To configure the advanced options:

1. Specify the Subject Prefix in the subject line of imported emails. This feature allows organizing imported data when multiple sources share a common target.

“ ”

Note: Not applicable to the EV Folder target.


“ ”

2. Specify Do not download data modified before and Do not download data modified after to allow cutting off data outside the set date range. If the before date is set to 08/17/2022 and the after date is set to 08/25/2022, only the data between these two dates will be downloaded. Data outside that time frame will be ignored. Note that both options can be used independently as well.


ADVANCED CONFIGURATION OPTIONS

Subject prefix

Do not download data modified before:



Do not download data modified after:



Attachments Configuration

If Include original data as attachment is enabled, the JSON file will be attached to the output message.

ATTACHMENTS CONFIGURATION

Include original data as attachment

Additionally Processed Data

Once you are through setting up the Box application, you can also configure a few optional settings.

- If Process file downloads is checked, it will process the download file events from the events feed in Box. The files from Box are downloaded and attached to the messages. The downloads are recorded as download events in Box.
- If the Process file downloads box is checked, the download events are processed too, and again recorded as downloads in the Box, and so on. So each consequent time, the number of imported download events is increased exponentially.
- In the Skip downloads initiated by service field, the application ID that downloads the file, can be added so that the downloads done by that application are ignored and not processed. To retrieve the ID:
 - Log in to Box and navigate to Box Platform.
 - At the top right corner, click My Apps and select your application to navigate to its details page.
 - Copy the last number from the URL in the browser address field: e.g., `https://<yourdomain>.app.box.com/developers/console/app/THIS-NUMBER`.

ADDITIONALLY PROCESSED DATA

Process file downloads

Skip downloads initiated by service

[How to get service id](#)

UBS Options

Arctera Insight Capture enables you to validate the UBS attachments. You can either group all messages based on participants or you can group messages by date.

UBS OPTIONS
 Group messages by participants

 Group messages by date

 Grouping interval: hours

You can also set grouping interval. The time is calculated in hours.

Timestamp Formatting

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 Date Time Format drop-down list.

TIME STAMP FORMATTING

Primary time zone

 Secondary time zone

Date time format

Meeting File Download Options

This section includes the following:

- 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 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 specifies how the transcript file is added to the imported message in the body of the message or attached to the message as a separate file.

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

MEETING FILE DOWNLOAD OPTIONS
 Do not download files greater than megabyte(s).
INCLUDE CHAT FILE
 In the body
 As attachment
INCLUDE TRANSCRIPT FILE
 In the body
 As attachment
MEETING RECORDINGS
 Video with audio
 Audio only

FX Connect Configuration

To configure the source:

1. Fill out the following fields:

- Company name - the company name provided to FX Connect
- Username - the username provided to FX Connect
- Password - the user's password
- Users URL - the user link
- Chats URL - the chat link
- From - a dummy email address is being added in case the email of the event is missing

2. Provide X.509 Certificate Thumbprint.

FX CONNECT CONFIGURATION

Company name

Username

Password

Users URL

Chats URL

From i

X.509 Certificate file

X.509 Certificate password

Threading and Formatting

To configure the section:

1. Select Source time zone. The messages in the source file are of the set time zone, the dates in the messages are processed to the UTC time zone. By default, Insight Capture sets the Source Time Zone as UTC.
2. Enable the Merge messages by thread option to combine all messages from a session into a single message.

THREADING AND FORMATTING

Source time zone

Merge messages by thread

Message Body

There are the following output message body options:

- Plain - this mode displays the message as a simple text.
- Grid mode - this mode allows you to see the information in the following columns:

- Message creator
- Message timestamp
- Message

MESSAGE BODY

Plain Mode

Grid Mode | [Select Style](#)

It is possible to change the color scheme of the grid mode by clicking the Select Style link.

SELECT GRID MODE STYLE ×

Title:

Title background:

Content:

Content background:

Lines:

Title	Content
Title	Content
Title	Content
Title	Content

CLOSE
SAVE

Split Messages

Splitting Messages option allows splitting big files. In the field 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.

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 Arctera Insight Capture.

SPLITTING MESSAGES

Split messages

(MB) Max size for each part of splitted message
Split size must be an integer

Include Record Type

In this section the types of records that should be processed from Symphony can be specified. At least one type should be selected. There are three types of records from Symphony that can be selected:

- Social Message
- Event
- Email Notification
- Reaction

INCLUDE RECORD TYPES

Social Message

Event

Email Notification

Reaction

Threading Options

Enable one of the following options:

- No threading: If selected, only a single SMS/MMS message will be generated for a message in the group.

- Per conversation: If selected, group SMS/MMS messages per conversation will be generated.

THREADING OPTIONS

No threading

Per conversation

Collector Options

Upload an XML template and select the relevant time zone. Arctera Insight Capture will attempt to retrieve the correct time zone from the source automatically.

TEXT BASED COLLECTOR OPTIONS

Choose XML Template V2 file * UPLOAD

Download XML Template V2 DOWNLOAD

Source Time Zone file

UTC ▼

The XML file should contain the information about the file itself. It should specify if the file contains headers, the number of columns, delimiter type and the text qualifier. Next part of the XML file should assign column names, identify data types, and indicate if the columns are optional. Lastly, it should map the columns to the expected data fields: Sender, Participants, Title, ActivityDateTime, and Content.

If you want to manually set up the Source Time Zone, select the relevant one from the drop-down list. The Source Time zone setting will attempt to retrieve the time zone from the data itself automatically.

Miscellaneous Settings

- The Subject Prefix is added to the subject line of imported emails. This is useful for organizing imported data, i.e., when multiple sources share a common target.

“ ”

Note: Not applicable to the EV Folder target.



- If the option Merge Messages by Thread is enabled, Arctera Insight Capture retrieves the data from a thread and archives it as one message.
- 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 08/17/2021 and the after date is set to 08/25/2021, only the data between these two dates will be downloaded. Data outside that time frame will be ignored. Note that both options can be used independently as well.

MISC SETTINGS

Subject prefix

Merge messages by thread

Message time zone

(UTC-08:00) Pacific Time (US & Canada) (PST)
▼

Process incomplete days

Do not download data modified before:

Do not download data modified after:

Splitting Messages

Check the Splitting 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.

SPLITTING MESSAGES

Split messages

(MB) Max size for each part of splitted message

Split size must be an integer

Source Type

For Source Type configuration:

1. Enable Microsoft Teams to collect recordings from Microsoft Teams.
2. Enable Mobile Phone to collect recordings from mobile phone calls.

SOURCE TYPE

Microsoft Teams

Mobile Phone

Dubber Speik Recordings Configuration

For Dubber Speik Recordings Configuration:

1. Enter Dubber Speik Username and Password.
2. Enter Speik AccountId.
3. Enter Speik Solution InstanceId and Speik base URL.

DUBBER SPEIK RECORDINGS CONFIGURATION

Username

Password

Speik AccountId

Speik Solution InstanceId

Speik base URL

Department Filtration

To customize how departments are monitored, select one of the following options:

- Monitor all departments: All departments will be monitored. No further input is required.
- Monitor all except selected departments: Monitoring will exclude the departments you specify. A CSV upload interface will appear to allow you to provide the list of departments to exclude.

- Monitor only selected departments: Monitoring will be limited to the departments you specify. A CSV upload interface will appear to allow you to provide the list of departments to include.

DEPARTMENT FILTRATION

Monitor all departments
 Monitor all except selected departments
 Monitor only selected departments

File * UPLOAD

Download file DOWNLOAD

To ensure proper functionality, uploaded CSV files must meet the following criteria:

- File Format: Must be a CSV file.
- File Size: Must be greater than 0 KB. Empty files will be rejected.
- Content Structure: Must contain a single column listing department names. No headers or additional columns are allowed.

JSON Collector Options

Upload the JSON template provided separately for each source which is used to rapidly transform .JSON files to a predefined format.

To configure the section:

1. Upload the JSON template.
2. Upload the Signature file.

“ ”

Note: Templates must be reviewed and cryptographically signed by Arctera.

“ ”

3. Enable Include original data as attachment in case you want to include original data as an attachment in the output message.

JSON COLLECTOR OPTIONS

Choose JSON template file * UPLOAD

Download JSON template file DOWNLOAD

Choose Signature file * UPLOAD

Download Signature file DOWNLOAD

Include original data as attachment

XIP Collector Options

If you want to manually set up the Source Time Zone, select the relevant one from the drop-down list.

XIP COLLECTOR OPTIONS

Source Time Zone

UTC ▼

Arctera Insight Capture assumes that the messages in the source file are of the set time zone and based on that data the dates in the messages are processed to UTC time zone. By default, Source Time Zone is set as the Local Time Zone.

Attachments Validation

Arctera Insight Capture enables you to develop customized notes for attachments validation. In case Fail Messages with missing data set is selected, the messages that do not have data set are failed.

If you select the Replace missing attachments with the following note and input your custom note, all the missing attachments of the messages will not be processed, and you will see only the custom message that you have entered.

ATTACHMENTS VALIDATION

- Replace missing attachments with the following note:

This message contained the following attachments that act

- Fail messages with missing data set.

Activities to Be Processed

You can choose which activities are processed from Citrix Workspace & ShareFile.

ACTIVITIES TO BE PROCESSED**ACTIVITIES**

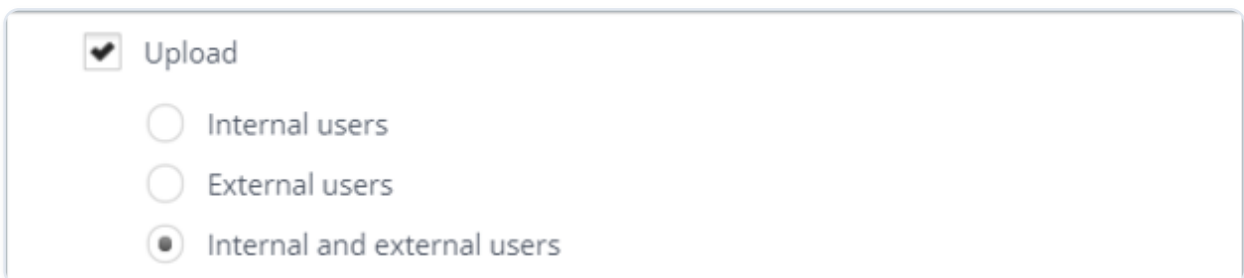
- Archive only ShareFile shared files
- Archive all activities in ShareFile
- Archive only certain selection of activities in ShareFile
- Upload
 - Download/View
 - Folder create
 - Check in/Check out
 - Edit
 - Delete/Archive
 - Login
 - Move
 - File share
 - Share file requests
 - Text-only messages

- Archive only ShareFile shared files - Only shared files are imported.
- Archive all activities in ShareFile \- All activities are captured and imported.
- Archive only certain selection of activities in ShareFile \- Activities to be captured and imported can be selected separately from the list below:
 - Upload
 - Download/View

- Folder create
- Check in/Check out
- Edit
- Delete/Archive
- Login
- Move
- File share
- Share file requests
- Text-only messages

In case Upload activity is activated, the following options become available:

- Internal users - when enabled, only the upload activity of internal users will be captured
- External users - when enabled, only the upload activity of external users will be captured
- Internal and external users - when enabled, the upload activity of both the internal and external user will be captured.



The screenshot shows a configuration panel for 'Upload' activity. At the top, there is a checked checkbox labeled 'Upload'. Below it, there are three radio button options: 'Internal users', 'External users', and 'Internal and external users'. The 'Internal and external users' option is selected, indicated by a filled circle.

Advanced Configuration Option

To configure advanced options:

1. Specify the Subject Prefix in the subject line of imported emails. This is useful for organizing imported data, i.e., when multiple sources share a common target.

“ ”


Note: Not applicable to the EV Folder target.


“ ”

2. Specify Do not download data modified before and Do not download data modified after to allow cutting off data outside the set date range. If the before date is set to 08/17/2023 and the after date is set to 08/25/2023, only the data between these two dates will be downloaded. Data outside that range will be ignored. Note that both options can be used independently as well.
3. Specify the number of the previous days (0-31) prior to the current run so that Insight Capture can scan for edits and new comments of a post.

ADVANCED CONFIGURATION OPTIONS

Subject prefix

Do not download data modified before: 

Do not download data modified after: 

Posts history check (days)
Specify the number of previous days (maximum 31) prior to the current run for Alta Capture to scan for edits and new comments of a post.

Message Decryption Options

Microsoft Graph does not verify the certificate issuer and uses the public key for only encryption.

To receive the notifications decrypted:

1. Click +ADD CERTIFICATE.
2. Select the X.509 Certificate file.
3. Provide the X.509 certificate password. The Certificate thumbprint field will be auto populated in case the collector was previously configured by uploading a certificate.

MESSAGE DECRYPTION OPTIONS

[+ ADD CERTIFICATE](#)

CERTIFICATE ⚙️ - ✕

X.509 Certificate file [SELECT](#)

X.509 Certificate password

BlackBerry Options

The BlackBerry source can only process one format at a time. You have the following Collector Types to choose from the drop-down list:

- P2P (default)
- SMS
- Messenger (BBM)
- Video chat

BLACKBERRY OPTIONS

Collector Type ▼

Source time zone

▼

Once you have selected the Collector Type, you can also provide the Source time zone information. It is assumed that the messages in the source file are of the set time zone and based on that data, the dates in the messages are processed to UTC time zone. By default, Arctera Insight Capture sets the Source time zone as Local time zone.

BlackBerry Filtering

Use BlackBerry Filtering configurations to determine which status types, subtypes, or commands will be imported. Separate each name with the following symbol: |. Note, that wildcards are not supported for the following field.

Each source type has different filtering options. P2P type can be filtered with status types and commands. SMS sources can be filtering by all displayed options. The Messenger type can be filtered only by commands. Video chats cannot be filtered. If you want to process the whole data, leave all three fields blank.

BLACKBERRY FILTERING

Filter by status types (separated by '|'):

Filter by status subtypes (separated by '|'):

Filter by commands (separated by '|'):

Threading

For Threading:

- If the No threading radio button is activated, only a single message is generated for a comment or reply.
- If One parent comment with replies is activated, then a threaded message is generated for comments and replies.
 - The Message time zone by which the messages are split based on the selected time zone from the drop-down menu. When Process Incomplete Days option is enabled, the messages of the days that have not yet ended will be imported in a separate email as well. This option can be selected only if One parent comment with replies is activated.

THREADING

No threading
 One parent comment with replies

Message time zone

Process incomplete days

Primary Address to Use

Choose the email address type you would like Arctera Insight Capture to prioritize when processing data from users that have both Pivot email address and Corporate email address.

PRIMARY ADDRESS TO USE

Pivot email address
 Corporate email address

LSEG Options

The option Split by Day merges the messages from the same day into one email message. The time zone by which the messages are split can be selected from the drop-down menu. This option can be selected only if Merge Messages by Thread is selected.

LSEG OPTIONS

Merge messages by thread
 Split messages by day

XML Template Configuration Guideline

To configure XML Template sample:

1. Configure the information about the file itself: if the file contains headers, number of columns, text qualifier and attachment method .

```
<?xml version="1.0" encoding="UTF-8"?>
```

```
<configuration> <version>AV_2.0</version>
```

```
<options>
```

```
<containsHeader>Yes</containsHeader>
```

```
<maxCols>8</maxCols>
```

```
<delimiter>","</delimiter>
```

```
<text_qualifier>"</text_qualifier>
```

```
<content_type>PlainText</content_type>
```

```
<attachmentMethod>Archive</attachmentMethod>
```

```
</options>
```

1. Assign column names, identify data type, and indicate if columns are optional.

```
<columns>
```

```
<column>
```

```
<order>1</order>
```

```
<name>FileName</name>
```

```
<datatype>StringList</datatype>
```

```
<datatype_options>
```

```
<delimiter>";"</delimiter>
```

```
<append>""</append>
```

```
</datatype_options>
```

```
</column>
```

```
<column>
```

```
<order>3</order>
```

```
<name>Start Date</name>
```

```
<datatype>DateTime</datatype>
```

```
<datatype_options> <format>XX/DD/YYYY HH:MM:SS</format> </datatype_options>
```

```
</column>
```

```
<column>
```

```
<order>5</order>
```

```
<name>Username</name>
```

```
<datatype>String</datatype>
```

```
</column>
```

```
<column>
```

```
<order>6</order>
```

```
<name>User Email</name>
```

```
<datatype>String</datatype>
```

```
</column>
```

```
<column>
```

```
<order>7</order>
```

```
<name>Participant Name</name>
```

```
<datatype>StringList</datatype>
```

```
<datatype_options>
```

```
<delimiter>"</delimiter>
```

```
<append>"</append>
```

```
</datatype_options>
```

```
</column>
```

```
<column>
```

```
<order>8</order>
```

```
<name>Participant Email</name>
```

```
<datatype>String</datatype>
```

```
</column>
```

```
</columns>
```

1. The last part of the XML file maps the columns to the expected data fields: Sender, Participants, Title, ActivityDateTime, and Body:

```
<mappings>
```

```
<mapping can_be_empty = "Yes">
```

```
<property>Sender</property>
```

```
<items>
```

```
<item>User Email</item>
```

```
</items>
```

```
</mapping>
```

```
<mapping can_be_empty = "Yes">
```

```
<property>SenderName</property>
```

```
<items>
```

```
<item>Username</item>
```

```
</items>
```

```
</mapping>
```

```
<mapping can_be_empty = "Yes">
```

```
<property>Participants</property>
```

```
<items>
```

```
<item Role="To">Participant Email
```

```
</item>
```

```
</items>
```

```
</mapping>
```

```
<mapping can_be_empty = "Yes">
```

```
<property>ParticipantNames</property>
```

```
<items>
```

```
<item Role="To">Participant Name</item>
```

```
</items>
```

```
</mapping>
```

```
<mapping can_be_empty = "Yes">
```

```
<property>Title</property>
```

```
<items>
```

```
<item>Call Id</item>
```

```
<string>" "</string>
```

```
</items>
```

```
</mapping>
```

```
<mapping can_be_empty = "Yes">
```

```
<property>Content</property>
```

```
<items>
```

```
<string>"Call Id: "</string>
```

```
<item>Call Id</item>
```

```
<string>" "</string>
```

```
<string>"Start Date UTC: "</string>
```

```
<item>Start Date</item>
```

```
<string>"
```

```
"</string>
```

```
<string>"End Date UTC: "</string>
```

```
<item>End Date</item>
```

```
<string>"
```

```
"</string>
```

```
</items>
```

```
</mapping>
```

```
<mapping can_be_empty = "Yes">
```

```
<property>ActivityDateTime</property>
```

```
<items>
```

```
<item>Start Date</item>
```

```
</items>
```

```
</mapping>
```

```
<mapping can_be_empty = "Yes">
```

```
<property>Attachments</property>
```

```
<items>
```

```
<item>FileName</item>
```

```
</items>
```

```
</mapping>
```

```
<mapping can_be_empty = "Yes">
```

```
<property>X-KVS-MessageType</property>
```

```
<items> <string>"IM.AudioVideo"</string>
```

```
</items>
```

```
</mapping>
```

`</mappings>``</configuration>`

XSLT Collector Options

To configure the section:

1. Upload the signed XSLT template.
2. Upload the Signature file.

“ ”

Note: Templates must be reviewed and cryptographically signed by Arctera.

“ ”

XSLT COLLECTOR OPTIONS

Choose XSLT V2 file *	UPLOAD
Download XSLT V2 file	DOWNLOAD
Choose Signature file *	UPLOAD
Download Signature file	DOWNLOAD

Notes

- The source file group should contain an MP3 file and an XML file with the same GUID as a file name.
- When configuring the SFTP source, the Download subdirectory recursively option should be enabled as the expected file group (an MP3 file and an XML file) is nested with NTR-X structure.
- Ensure not to exceed the Windows limitation for file names when processing ZIP files as they may not be processed due to the file name length of the file group.

SharePoint Activities

For SharePoint activities:

1. Activate Monitor all sites in case all SharePoint sites should be monitored. In this case, file upload and download options will be inactive.
2. Activate Monitor certain sites in case only certain SharePoint sites/sub-sites should be monitored.
3. Upload the CSV file that includes:
 - The site/sub-site URL which can be found by clicking the Copy button from the right-side opened Page Details window.
 - TRUE or FALSE options which will specify whether the sub-sites should or should not be monitored accordingly. If not specified, the default value will be FALSE, i.e., sub-sites will not be monitored.
4. In case you need to make changes in the CSV, download the already uploaded file, make the necessary changes, and upload it again.

The following activities can be captured:

- Microfeed
- Site page
- Document library
- Picture library
- Custom list

“ ”

Note: If the file names contain the "#" and "%" symbols, they will not be downloaded.

“ ”

SHAREPOINT ACTIVITIES

Monitor all sites
 Monitor certain sites

File *

Download file

Microfeed
 Site Page
 Document Library
 Picture Library
 Custom List

Ignore inactive files i

Ignore files with no activity in the last days.

By enabling the Ignore inactive files checkbox and specifying the Ignore files with no activity in the last X days, only the files with their comments modified within the specified days will be captured.

Processing Mode

There are the following options:

- The Single message per event captures each event (post, comment, reply) in one message.
- The Single message per comment and its replies/sub-comments captures a message and all replies and comments related to it in one output message.
- The Single message per site captures all messages and their replies and comments in one combined message.

PROCESSING MODE

Single message per event
 Single message per comment and its replies/sub-comments
 Single message per site

If any event has been changed after a single Arctera Insight Capture run, when it is run the next time, the updated version of the event will be imported. The processing modes apply both to the Newsfeed and to the Site Page comments.

Dubber Speik SMS Configuration

For Dubber Speik SMS Configuration:

1. Enter Dubber Speik Username and Password.
2. Enter Speik AccountId.
3. Enter Speik Solution InstanceId and Speik base URL.

DUBBER SPEIK SMS CONFIGURATION

Username	<input type="text"/>
Password	<input type="password"/>
Speik AccountId	<input type="text"/>
Speik Solution InstanceId	<input type="text"/>
Speik base URL	<input type="text" value="https://uk.speik.com/"/>

“ ”

Note: These credentials should be provided to configure the Dubber Speik SMS collector. Please reach out to your Dubber/Speik representative to obtain your credentials.

“ ”

Model Selection

Here the user can make a Model Selection which allows selecting licensing and payment options for Microsoft Teams APIs:

- Evaluation mode \- enables access to APIs with limited usage per requesting an application for evaluation purposes.

A \- is restricted to applications performing a security or compliance function and requires a supported license.

MODEL SELECTION
 Evaluation Mode

 Model A
Conversation Areas to Capture

Specify the activities to be captured by the collector.

1. Enable All areas to capture data from chats and channels.
2. Enable Certain areas in case either Chats or Channels data needs to be collected.

“ ”

Note: The shared channels' membership type is printed in the output message as "UnknownFutureValue" due to API limitation.

“ ”

CONVERSATION AREAS TO CAPTURE
 All areas

 Certain areas

 Chats

 Channels
Disclaimer Validation

Develop customized notes for disclaimer validation. The default setting is Fail messages with missing disclaimers, so the messages that do not have disclaimers are failed.

If you select the Replace all disclaimer with the following note and input your custom note, all the disclaimers will not be processed and instead of them the input note will be added to the message.

If you select the Replace missing disclaimers with the following note and input your custom note, all the missing disclaimers will not be processed and instead of them the input note will be added to the message.

DISCLAIMER VALIDATION

Replace all disclaimers with the following note:

This message contained the following disclaimer but was r

Replace missing disclaimers with the following note:

This message contained the following disclaimer that actuc

Fail messages with missing disclaimers. (default)

Bloomberg Options

The following options are available:

BLOOMBERG OPTIONS

Use legacy Bloomberg importer style of date processing

Full attachment validation

Full disclaimer validation

Split IB conversations by day

Max IB message size: (MB)

For IB: use EndTime as SentTime instead of StartTime

For MSG: exclude TO, CC and BCC data from message body

For IB: Easy review mode

For IB: Ignore historical data

For IB: Ignore data with "History" tag

- Use Legacy Bloomberg Importer style of date processing \- Scans the date and time stamp of dump files and ensures their time zones correspond with those of the device on which Insight Capture is running (recommended for dump files created before March of 2009). If this option is not selected, it is assumed that date processing should be accomplished based on the Universal Time Coordinated (UTC) time zone, which is used for all current Bloomberg files.

However, Bloomberg files created before March 2009 will be processed successfully, even if this option is not selected (selection, however, is recommended).

- Full attachment validation \- By default enabled, the entire source (file group) is quarantined, in case the attachment of a message is missing or corrupted, i.e., the selection under Attachment Validation (Fail messages with missing attachments) will be ignored.
- Full disclaimer validation \- By default enabled, the entire source (file group) is quarantined, in case the disclaimer of a message is missing or corrupted, i.e., the selection under Disclaimer Validation (Fail messages with missing disclaimers) will be ignored.
- Split IB Conversations by day \- If checked, messages with the same UTC day will be imported into one message.
- Max IB Message Size: (MB) \- When this option is checked and the maximum size is set, the messages with larger message size will be split. Note that attachments with larger size will not be split.
- For IB: use EndTime as SentTime instead of StartTime \- The SentTime in the imported message of IB source files will be replaced with the EndTime of the message, instead of StartTime.

“ ”

Note: If Split IB Messages by day is enabled, DateTimeUTC is prioritized.

“ ”

- For MSG: exclude TO, CC and BCC data from message body \- When this option is checked, TO, CC, and BCC data of the source MSG message is removed from the body of the message.
- For IB: Easy Review Mode \- When this option is checked, Participant Entered and Participant Left events are shown in a separate table at the bottom of the message.
- For IB: Ignore Historical Data \- When this option is checked, there will not be any historical events from prior days.
- For IB: Ignore Data with History Tag \- When this option is checked, data with "History" tag will be ignored.

“ ”

Note: In the below examples, the time stamps in the body message are UTC, while the SentTime of the generated output is UTC +4. The SentTime of the message is adjusted to the time zone of the device it is opened on.

“ ”

The mapping of SentDate (10:26 PM) can be changed using the "For IB: use EndTime as SentTime instead of StartTime" checkbox. By default, SentTime of the email is shown the same as StartTime.

If For IB: use EndTime as SentTime instead of StartTime is enabled the SentTime of the generated email is shown the same as the EndTime of the message.

Email Address to Use

Select the email address type you would like to use when processing data from users that have both their personal email address and their corporate email address registered on Bloomberg.

EMAIL ADDRESS TO USE

Bloomberg email address

Corporate email address

Both email addresses

In case Both email addresses is selected, you can make either the Bloomberg or Corporate email address primary by clicking the corresponding button.

IB Message Body

In the Bloomberg collector, you can choose from the following IB message body options:

- Plain mode
- Grid mode | Select style
- Light grid mode

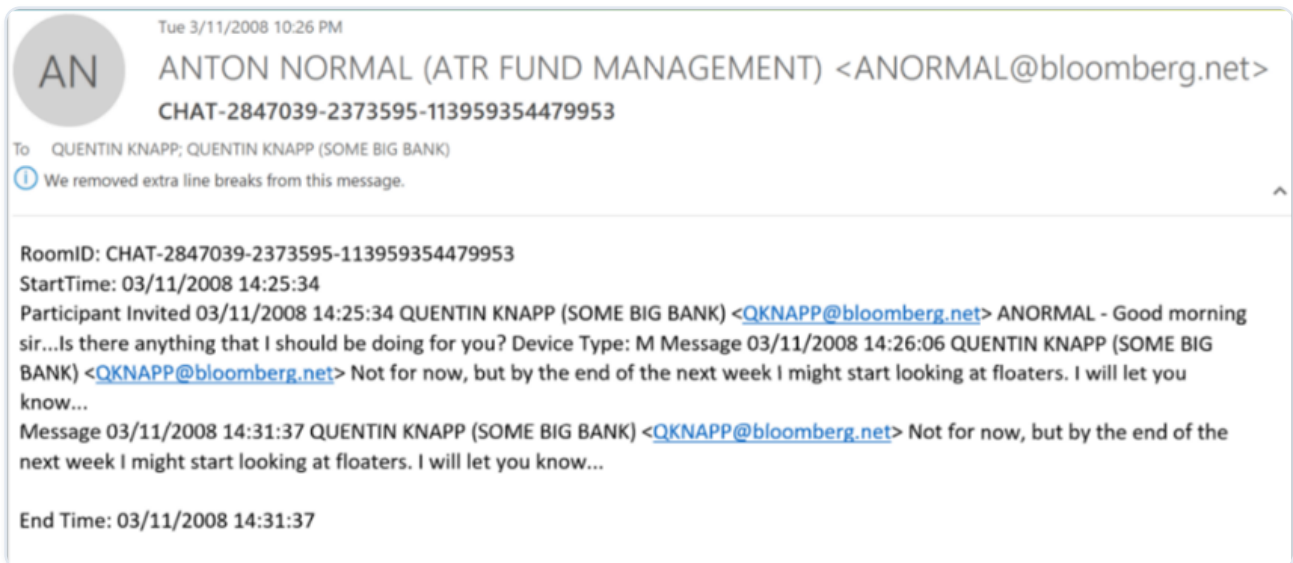
IB MESSAGE BODY

Plain mode

Grid mode | [Select style](#)

Light grid mode


When you select the Plain mode option (default), you will see the interactions below each other. Plain mode displays the message in its basic form.



Tue 3/11/2008 10:26 PM

AN ANTON NORMAL (ATR FUND MANAGEMENT) <ANORMAL@bloomberg.net>
CHAT-2847039-2373595-113959354479953

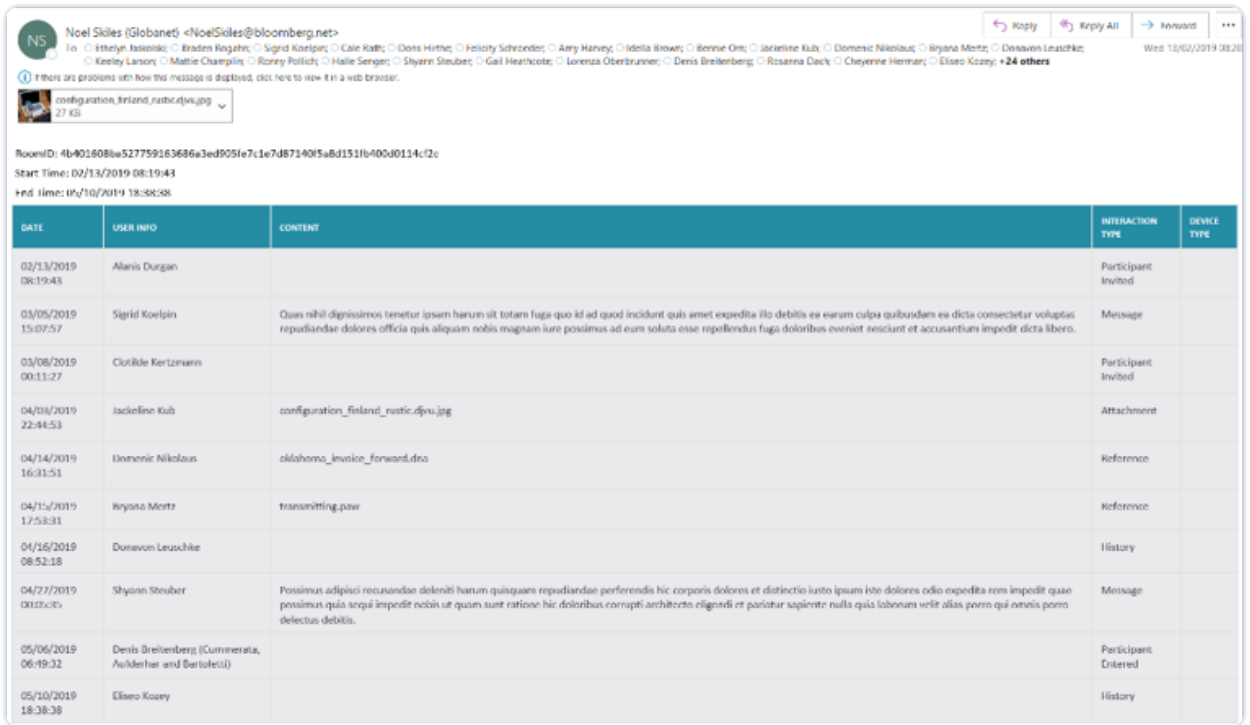
To: QUENTIN KNAPP; QUENTIN KNAPP (SOME BIG BANK)

 We removed extra line breaks from this message.

RoomID: CHAT-2847039-2373595-113959354479953
 StartTime: 03/11/2008 14:25:34
 Participant Invited 03/11/2008 14:25:34 QUENTIN KNAPP (SOME BIG BANK) <QKNAPP@bloomberg.net> ANORMAL - Good morning sir...Is there anything that I should be doing for you? Device Type: M Message 03/11/2008 14:26:06 QUENTIN KNAPP (SOME BIG BANK) <QKNAPP@bloomberg.net> Not for now, but by the end of the next week I might start looking at floaters. I will let you know...
 Message 03/11/2008 14:31:37 QUENTIN KNAPP (SOME BIG BANK) <QKNAPP@bloomberg.net> Not for now, but by the end of the next week I might start looking at floaters. I will let you know...
 End Time: 03/11/2008 14:31:37

If you enable the Grid mode option, you will see the information in the following columns:

- Interaction Type, which contains information about participants and messages, such as Participant Entered, Participant Left, Participant Invited, Message, Attachment.
- Date, which shows the date and time the message was sent.
- User Info, where you can view the user's Full Name (Company Name), Email Address
- Content
- Device Type, if the message was sent from a mobile device, it will be displayed as M in that field.






RoomID: 4b401608ba527759163686a3ed9051e7c1e7d87140f5a6d151b400d0114c12c
 Start Time: 02/13/2019 08:19:43
 End Time: 05/10/2019 18:38:38


DATE	USER INFO	CONTENT	INTERACTION TYPE	DEVICE TYPE
02/13/2019 08:19:43	Alanis Dugan		Participant Invited	
03/05/2019 15:07:57	Sigrid Koelpin	Quas nihil dignissimos tenetur ipsam harum sit totam fuga quo id ad quod incidant quis amet expedita illo debilis ea earum culpa quibusdam ea dicta consetetur voluptas repudiandae dolores officia quis aliquam nobis magnam iure possimus ad eum soluta esse repellendus fuga doloribus eveniet nesciant et accusantium impedit dicta libero.	Message	
03/08/2019 00:11:27	Clotilde Kertzenann		Participant Invited	
04/03/2019 22:44:53	Jackeline Kub	configuration_finland_rustic.djvu.jpg	Attachment	
04/14/2019 16:31:51	Domenic Nikolaus	oklahoma_invoice_forward.dna	Reference	
04/15/2019 17:53:31	Bryana Moritz	transmitting.paw	Reference	
04/16/2019 08:52:18	Donavon Leuschke		History	
04/27/2019 03:23:40	Shyann Steuber	Possimus adipisci recusandae deleniti harum quisquam repudiandae perferendis hic corporis dolores et distinctio iusto ipsum iste dolores odio expedita rem impedit quae possimus quis sequi impedit nobis ut quam sunt ratione hic doloribus corrupti architecto eligendi et pariatur sapiente nulla quis laborum velit alias porro qui omnis porro delectus debilis.	Message	
05/06/2019 06:49:32	Denis Breitenberg (Cummerata, Au/Deitar and Bartoletti)		Participant Entered	
05/10/2019 18:38:38	Eliseo Kozey		History	

When you enable Light grid mode, the data is two-toned an easy to be viewed with limited metadata.

CHAT-2847039-2373595-113959354479953


ANTON NORMAL (ATR FUND MANAGEMENT) <ANORMAL>
 To  QUENTIN KNAPP;  QUENTIN KNAPP (SOME BIG BANK)

Tue 3/11/2008 10:26 PM

 tradequotes.txt
 3 KB

RoomID: CHAT-2847039-2373595-113959354479953
 Start Time: 03/11/2008 14:25:34
 End Time: 03/11/2008 17:53:00

Participant Entered 03/11/2008 14:25:34 ANTON NORMAL (ATR FUND MANAGEMENT) <ANORMAL@bloomberg.net>

Participant Invited 03/11/2008 14:25:34 QUENTIN KNAPP (SOME BIG BANK) <QKNAPP@bloomberg.net>
 Content:
 ANORMAL - Good morning sir...Is there anything that I should be doing for you?

Participant Entered 03/11/2008 14:25:37 QUENTIN KNAPP (SOME BIG BANK) <QKNAPP@bloomberg.net>

Message 03/11/2008 14:26:06 QUENTIN KNAPP (SOME BIG BANK) <QKNAPP@bloomberg.net>
 Content: Not for now, but by the end of the next week I might start looking at floaters. I will let you know...

Message 03/11/2008 14:31:37 QUENTIN KNAPP (SOME BIG BANK) <QKNAPP@bloomberg.net>
 Content: Not for now, but by the end of the next week I might start looking at floaters. I will let you know...

Attachment 03/11/2008 21:19:22 QUENTIN KNAPP (SOME BIG BANK) <QKNAPP@bloomberg.net>
 Content: tradequotes.txt

Message 03/11/2008 17:52:27 QUENTIN KNAPP (SOME BIG BANK) <QKNAPP@bloomberg.net>
 Content: No thanks

Participant Left 03/11/2008 22:08:00 QUENTIN KNAPP (SOME BIG BANK) <QKNAPP@bloomberg.net>

Participant Left 03/11/2008 22:15:56 ANTON NORMAL (ATR FUND MANAGEMENT) <ANORMAL@bloomberg.net>

Processing Bloomberg Firm-Level Files

An ideal technique for processing Bloomberg's firm-level files is to set Ignored Target as the default. Then a filter should be configured to match segments for the necessary account numbers and route them to a secondary target, and likewise, another filter to match segments to account numbers that are unnecessary and route them to a Failed Target.

This way, new account numbers can be discovered using the reporting feature in Reporting & Message Tracking. Unconditional hit default target and Process all filters must be disabled from Filtering.

However, if you intend to set other Targets for your importer, click the exact target type to see how it is set up.

Next Steps

After setting up the collector, follow the links below to continue with the configuration of:

- [Monitored Users \(N/A\)](#)
- [Filters](#)
- [Targets](#)
- [Importer Settings](#)

Audio Video

Arctera Insight Capture Audio Video collector captures audio/video recording files. It allows parsing audio/video metadata files in a .csv format. It transforms source metadata to support the configured output file format. The mapping is done based on the uploaded XML template. It varies from source to source. Contact [Arctera Support](#) for more details on the mapping corresponding to the source you are going to use it for.

Activities Captured

- Participants: From, To, CC, and BCC
- Start time
- End time
- Attachments

“ ”

Note: To process the attachments, add the full path to the attachment in the CSV/TXT document. To prevent files with similar names, we recommend creating attachments with folder structure to avoid clash of files with similar names shared on different days and in different conversations. **Note:** To process the files properly, the files, that are going to be processed, and zipped attachments must have the same name.

“ ”

Source Configuration

For information on how to configure the following sections of the Source tab, see:

- File Source Configuration
- PGP Configurations
- Quarantine Location
- Miscellaneous Settings

Collector Options

Upload an XML template and select the relevant time zone. Insight Capture will attempt to retrieve the correct time zone from the source automatically.

The screenshot shows a configuration panel titled "COLLECTOR OPTIONS". It contains three main sections:

- A section for uploading a file: "Choose XML Template file *" with a dark blue "UPLOAD" button.
- A section for downloading a file: "Download XML Template file" with a grey "DOWNLOAD" button.
- A "Source Time Zone" dropdown menu with "UTC" selected and a dark blue arrow button.

The XML file should contain the information about the file itself. It should specify if the file contains headers, the number of columns, delimiter type and the text qualifier. Next part of the XML file should assign column names, identify data types, and indicate if the columns are optional. Lastly, it should map the columns to the expected data fields: Sender, Participants, Title, ActivityDateTime, and Content.

If you want to manually set up the Source Time Zone, select the relevant one from the drop-down list. The Source Time zone setting will attempt to retrieve the time zone from the data itself automatically.

XML Template Configuration Guideline

To configure XML Template sample:

1. Configure the information about the file itself: if the file contains headers, number of columns, text qualifier and attachment method .

```
<?xml version="1.0" encoding="UTF-8"?>
```

```
<configuration> <version>AV_2.0</version>
```

```
<options>
```

```
<containsHeader>Yes</containsHeader>
```

```
<maxCols>8</maxCols>
```

```
<delimiter>","</delimiter>
```

```
<text_qualifier>"</text_qualifier>
```

```
<content_type>PlainText</content_type>
```

```
<attachmentMethod>Archive</attachmentMethod>
```

```
</options>
```

1. Assign column names, identify data type, and indicate if columns are optional.

```
<columns>
```

```
<column>
```

```
<order>1</order>
```

```
<name>FileName</name>
```

```
<datatype>StringList</datatype>
```

```
<datatype_options>
```

```
<delimiter>";"</delimiter>
```

```
<append>""</append>
```

```
</datatype_options>
```

```
</column>
```

```
<column>
```

```
<order>3</order>
```

```
<name>Start Date</name>
```

```
<datatype>DateTime</datatype>
```

```
<datatype_options> <format>XX/DD/YYYY HH:MM:SS</format> </datatype_options>
```

```
</column>
```

```
<column>
```

```
<order>5</order>
```

```
<name>Username</name>
```

```
<datatype>String</datatype>
```

```
</column>
```

```
<column>
```

```
<order>6</order>
```

```
<name>User Email</name>
```

```
<datatype>String</datatype>
```

```
</column>
```

```
<column>
```

```
<order>7</order>
```

```
<name>Participant Name</name>
```

```
<datatype>StringList</datatype>
```

```
<datatype_options>
```

```
<delimiter>";"</delimiter>
```

```
<append>""</append>
```

```
</datatype_options>
```

```
</column>
```

```
<column>
```

```
<order>8</order>
```

```
<name>Participant Email</name>
```

```
<datatype>String</datatype>
```

```
</column>
```

```
</columns>
```

1. The last part of the XML file maps the columns to the expected data fields: Sender, Participants, Title, ActivityDateTime, and Body:

```
< mappings>
```

```
< mapping can_be_empty = "Yes">
```

```
< property>Sender</property>
```

```
< items>
```

```
< item>User Email</item>
```

```
</items>
```

```
</mapping>
```

```
< mapping can_be_empty = "Yes">
```

```
< property>SenderName</property>
```

```
< items>
```

```
< item>Username</item>
```

```
</items>
```

```
</mapping>
```

```
< mapping can_be_empty = "Yes">
```

```
< property>Participants</property>
```

```
< items>
```

```
< item Role="To">Participant Email
```

```
</item>
```

```
</items>
```

```
</mapping>
```

```
< mapping can_be_empty = "Yes">
```

```
<property>ParticipantNames</property>
```

```
<items>
```

```
<item Role="To">Participant Name</item>
```

```
</items>
```

```
</mapping>
```

```
<mapping can_be_empty = "Yes">
```

```
<property>Title</property>
```

```
<items>
```

```
<item>Call Id</item>
```

```
<string>" "</string>
```

```
</items>
```

```
</mapping>
```

```
<mapping can_be_empty = "Yes">
```

```
<property>Content</property>
```

```
<items>
```

```
<string>"Call Id: "</string>
```

```
<item>Call Id</item>
```

```
<string>" "</string>
```

```
<string>"Start Date UTC: "</string>
```

```
<item>Start Date</item>
```

```
<string>"
```

```
"</string>
```

```
<string>"End Date UTC: "</string>
```

```
<item>End Date</item>
```

```
<string>"  
"</string>  
</items>  
</mapping>  
<mapping can_be_empty = "Yes">  
<property>ActivityDateTime</property>  
<items>  
<item>Start Date</item>  
</items>  
</mapping>  
<mapping can_be_empty = "Yes">  
<property>Attachments</property>  
<items>  
<item>FileName</item>  
</items>  
</mapping>  
<mapping can_be_empty = "Yes">  
<property>X-KVS-MessageType</property>  
<items> <string>"IM.AudioVideo"</string>  
</items>  
</mapping>  
</mappings>  
</configuration>
```

Next Steps

After setting up the collector, follow the links below to continue with the configuration of:

- [Monitored Users \(N/A\)](#)
- [Filters](#)
- [Targets](#)
- [Importer Settings](#)

BlackBerry

The BlackBerry smart phone was once the most popular mobile device for enterprise use. Arctera Insight Capture captures BlackBerry communications and stores them in existing email archive, whether on-prem or in the Cloud.

Activities Captured

- Pin-to-pin
- Messenger
- SMS/MMS

Source Configuration

For information on how to configure the following sections of the Source tab, see:

- [File Source Configuration](#)
- [PGP Configurations](#)
- [Quarantine Location](#)
- [Miscellaneous Settings](#)

BlackBerry Options

The BlackBerry source can only process one format at a time. You have the following Collector Types to choose from the drop-down list:

- P2P (default)
- SMS
- Messenger (BBM)
- Video chat

BLACKBERRY OPTIONS

Collector Type ▼

Source time zone

▼

Once you have selected the Collector Type, you can also provide the Source time zone information. It is assumed that the messages in the source file are of the set time zone and based on that data, the dates in the messages are processed to UTC time zone. By default, Arctera Insight Capture sets the Source time zone as Local time zone.

BlackBerry Filtering

Use BlackBerry Filtering configurations to determine which status types, subtypes, or commands will be imported. Separate each name with the following symbol: |. Note, that wildcards are not supported for the following field.

Each source type has different filtering options. P2P type can be filtered with status types and commands. SMS sources can be filtering by all displayed options. The Messenger type can be filtered only by commands. Video chats cannot be filtered. If you want to process the whole data, leave all three fields blank.

BLACKBERRY FILTERING

Filter by status types (separated by '|'):

Filter by status subtypes (separated by '|'):

Filter by commands (separated by '|'):

Next Steps

After setting up the collector, follow the links below to continue with the configuration of:

- [Monitored Users \(N/A\)](#)
- [Filters](#)
- [Targets](#)
- [Importer Settings](#)

Bloomberg

Bloomberg delivers business and markets news, data, analysis, and video to the world, featuring stories from Business week and Bloomberg News. Bloomberg Vault is a hosted end-to-end information management service that delivers compliance and IT solutions by leveraging the scalability and reliability of Bloomberg's global infrastructure. It provides secure digital storage for corporate clients of Bloomberg, primarily email and messaging content. Insight Capture imports and processes the files from Bloomberg.

Activities Captured

- [Disclaimers \(.dsc\)](#)
- [Instant Bloomberg Messages \(.ib\)](#), [attachments \(.att\)](#)
- [Email Messages \(.msg\)](#), [attachments \(.att\)](#)

“ ”

Note: To process current schema files, the file filter should be configured with the following extensions: `.ib19.xml*.gpg |.msg.xml*.gpg |.dsc.xml*.gpg |.ib19.att..tar.gz.gpg |.msg.att..tar.gz.gpg`.

“ ”

Source Configuration

For information on how to configure the following sections of the Source tab, see:

- [File Source Configuration](#)
- [PGP Configurations](#)
- [Quarantine Location](#)
- [Miscellaneous Settings](#)

- Attachment Validation

Disclaimer Validation

Develop customized notes for disclaimer validation. The default setting is Fail messages with missing disclaimers, so the messages that do not have disclaimers are failed.

If you select the Replace all disclaimer with the following note and input your custom note, all the disclaimers will not be processed and instead of them the input note will be added to the message. If you select the Replace missing disclaimers with the following note and input your custom note, all the missing disclaimers will not be processed and instead of them the input note will be added to the message.

DISCLAIMER VALIDATION

Replace all disclaimers with the following note:

This message contained the following disclaimer but was re

Replace missing disclaimers with the following note:

This message contained the following disclaimer that actuc

Fail messages with missing disclaimers. (default)

Bloomberg Options

The following options are available:

BLOOMBERG OPTIONS

- Use legacy Bloomberg importer style of date processing
- Full attachment validation
- Full disclaimer validation
- Split IB conversations by day
- Max IB message size: (MB)
- For IB: use EndTime as SentTime instead of StartTime
- For MSG: exclude TO, CC and BCC data from message body
- For IB: Easy review mode
- For IB: Ignore historical data
- For IB: Ignore data with "History" tag

- Use Legacy Bloomberg Importer style of date processing \- Scans the date and time stamp of dump files and ensures their time zones correspond with those of the device on which Insight Capture is running (recommended for dump files created before March of 2009). If this option is not selected, it is assumed that date processing should be accomplished based on the Universal Time Coordinated (UTC) time zone, which is used for all current Bloomberg files. However, Bloomberg files created before March 2009 will be processed successfully, even if this option is not selected (selection, however, is recommended).
- Full attachment validation \- By default enabled, the entire source (file group) is quarantined, in case the attachment of a message is missing or corrupted, i.e., the selection under Attachment Validation (Fail messages with missing attachments) will be ignored.
- Full disclaimer validation \- By default enabled, the entire source (file group) is quarantined, in case the disclaimer of a message is missing or corrupted, i.e., the selection under Disclaimer Validation (Fail messages with missing disclaimers) will be ignored.
- Split IB Conversations by day \- If checked, messages with the same UTC day will be imported into one message.
- Max IB Message Size: (MB) \- When this option is checked and the maximum size is set, the messages with larger message size will be split. Note that attachments with larger size will not be split.
- For IB: use EndTime as SentTime instead of StartTime \- The SentTime in the imported message of IB source files will be replaced with the EndTime of the message, instead of StartTime.

“ ”

Note: If Split IB Messages by day is enabled, DateTimeUTC is prioritized.

“ ”

- For MSG: exclude TO, CC and BCC data from message body \- When this option is checked, TO, CC, and BCC data of the source MSG message is removed from the body of the message.
- For IB: Easy Review Mode \- When this option is checked, Participant Entered and Participant Left events are shown in a separate table at the bottom of the message.
- For IB: Ignore Historical Data \- When this option is checked, there will not be any historical events from prior days.
- For IB: Ignore Data with History Tag \- When this option is checked, data with "History" tag will be ignored.

“ ”

Note: In the below examples, the time stamps in the body message are UTC, while the SentTime of the generated output is UTC +4. The SentTime of the message is adjusted to the time zone of the device it is opened on.

“ ”

The mapping of SentDate (10:26 PM) can be changed using the "For IB: use EndTime as SentTime instead of StartTime" checkbox. By default, SentTime of the email is shown the same as StartTime.

If For IB: use EndTime as SentTime instead of StartTime is enabled the SentTime of the generated email is shown the same as the EndTime of the message.

Email Address to Use

Select the email address type you would like to use when processing data from users that have both their personal email address and their corporate email address registered on Bloomberg.

EMAIL ADDRESS TO USE

- Bloomberg email address
- Corporate email address
- Both email addresses

In case Both email addresses is selected, you can make either the Bloomberg or Corporate email address primary by clicking the corresponding button.

IB Message Body

In the Bloomberg collector, you can choose from the following IB message body options:

- Plain mode
- Grid mode | Select style
- Light grid mode

IB MESSAGE BODY

- Plain mode
- Grid mode | [Select style](#)
- Light grid mode

When you select the Plain mode option (default), you will see the interactions below each other. Plain mode displays the message in its basic form.

AN

Tue 3/11/2008 10:26 PM

ANTON NORMAL (ATR FUND MANAGEMENT) <ANORMAL@bloomberg.net>

CHAT-2847039-2373595-113959354479953

To: QUENTIN KNAPP; QUENTIN KNAPP (SOME BIG BANK)

i We removed extra line breaks from this message.

RoomID: CHAT-2847039-2373595-113959354479953

StartTime: 03/11/2008 14:25:34

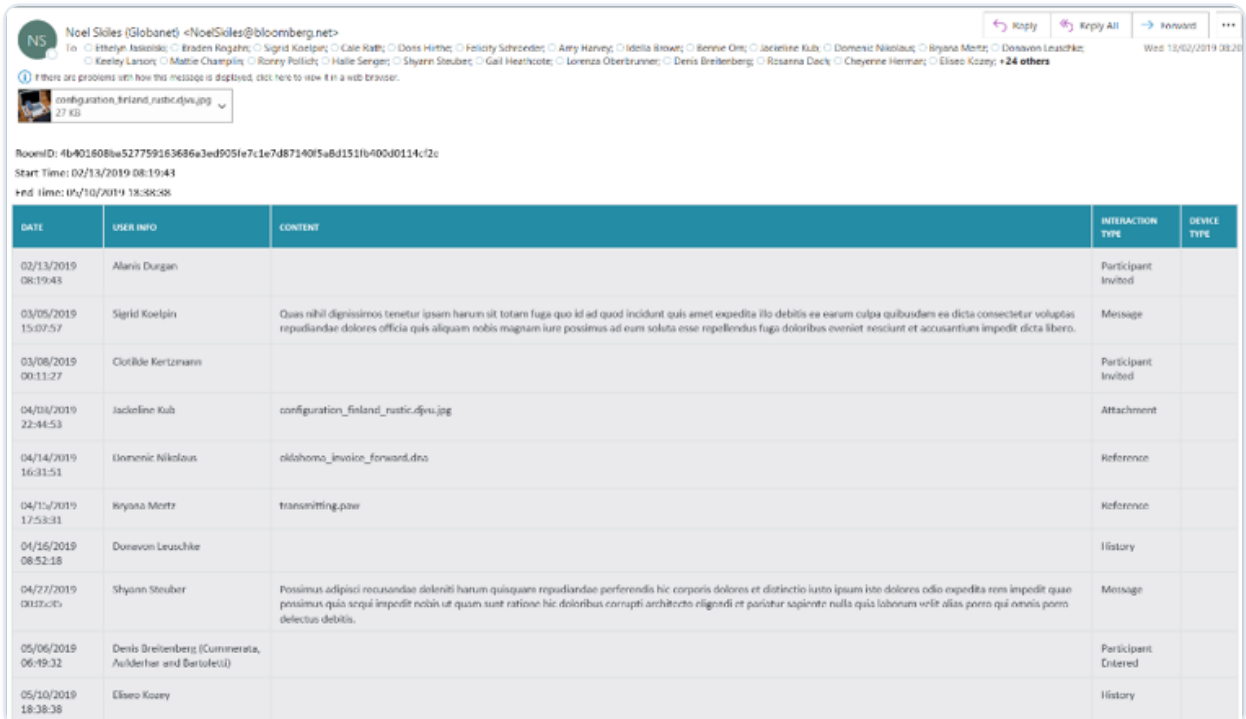
Participant Invited 03/11/2008 14:25:34 QUENTIN KNAPP (SOME BIG BANK) <QKNAPP@bloomberg.net> ANORMAL - Good morning sir...Is there anything that I should be doing for you? Device Type: M Message 03/11/2008 14:26:06 QUENTIN KNAPP (SOME BIG BANK) <QKNAPP@bloomberg.net> Not for now, but by the end of the next week I might start looking at floaters. I will let you know...

Message 03/11/2008 14:31:37 QUENTIN KNAPP (SOME BIG BANK) <QKNAPP@bloomberg.net> Not for now, but by the end of the next week I might start looking at floaters. I will let you know...

End Time: 03/11/2008 14:31:37

If you enable the Grid mode option, you will see the information in the following columns:




- Interaction Type, which contains information about participants and messages, such as Participant Entered, Participant Left, Participant Invited, Message, Attachment.
- Date, which shows the date and time the message was sent.
- User Info, where you can view the user's Full Name (Company Name), Email Address
- Content
- Device Type, if the message was sent from a mobile device, it will be displayed as M in that field.




DATE	USER INFO	CONTENT	INTERACTION TYPE	DEVICE TYPE
02/13/2019 08:19:43	Alanis Durgan		Participant Invited	
03/05/2019 15:07:57	Sigrid Koelplin	Quas nihil dignissimos tenetur ipsam harum sit totam fuga quo id ad quod incidunt quis amet expedita illo debitis ea eorum culpa quibusdam ea dicta consetetur volupatas repudiandae dolores officia quis aliquam nobis magnam iure possimus ad eum soluta esse repellendus fuga doloribus eveniet nesciunt et accusantium impedit dicta libero.	Message	
03/08/2019 00:11:27	Clothilde Kertzinann		Participant Invited	
04/01/2019 22:44:53	Jackeline Kub	configuration_finland_rustic.djvu.jpg	Attachment	
04/14/2019 16:31:51	Domenic Nikolous	oklahoma_invoice_forward.dno	Reference	
04/15/2019 17:53:31	Riyana Mertz	transmitting.paw	Reference	
04/16/2019 08:52:18	Dunavon Leuschke		History	
04/27/2019 03:22:35	Shyann Steuber	Possimus adipisci recusandae deleniti harum quisquam repudiandae perferendis hic corporis dolores et distinctio iusto ipsum iste dolores odio expedita rem impedit quae possimus quis atque impedit nobis ut quam sunt ratione hic doloribus corrupti architecto eligendi et pariatur sapiente nulla quis laborum velit alias porro qui omnis porro delectus debitis.	Message	
05/06/2019 06:49:32	Denis Breitenberg (Cummerata, Auferhar and Berthold)		Participant Entered	
05/10/2019 18:38:38	Eliseo Kozey		History	

When you enable Light grid mode, the data is two-toned an easy to be viewed with limited metadata.

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 tradequotes.txt
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RoomID: CHAT-2847039-2373595-113959354479953
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Message 03/11/2008 14:26:06 QUENTIN KNAPP (SOME BIG BANK) <QKNAPP@bloomberg.net>
 Content: Not for now, but by the end of the next week I might start looking at floaters. I will let you know...

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 Content: Not for now, but by the end of the next week I might start looking at floaters. I will let you know...

Attachment 03/11/2008 21:19:22 QUENTIN KNAPP (SOME BIG BANK) <QKNAPP@bloomberg.net>
 Content: tradequotes.txt

Message 03/11/2008 17:52:27 QUENTIN KNAPP (SOME BIG BANK) <QKNAPP@bloomberg.net>
 Content: No thanks

Participant Left 03/11/2008 22:08:00 QUENTIN KNAPP (SOME BIG BANK) <QKNAPP@bloomberg.net>

Participant Left 03/11/2008 22:15:56 ANTON NORMAL (ATR FUND MANAGEMENT) <ANORMAL@bloomberg.net>

Processing Bloomberg Firm-Level Files

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This way, new account numbers can be discovered using the reporting feature in Reporting & Message Tracking. Unconditional hit default target and Process all filters must be disabled from Filtering.

However, if you intend to set other Targets for your importer, click the exact target type to see how it is set up.

Next Steps

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- [Monitored Users \(N/A\)](#)
- [Filters](#)
- [Targets](#)
- [Importer Settings](#)

Box

Box platform is a cloud content management platform and can be accessed using the Box Content API. Box provides a suite of cloud content services that lets build content apps quickly.

Activities Captured

- Uploads
- Downloads and task assignments

“ ”

Note: During the first run, we will only get folder structure.

“ ”

- Comments
- Box quick notes (in Box generated special format)
- New version upload (in the message subject event type is displayed as edited)
- Task completed and task rejected (displayed in the message body as task deleted)
- Comment deletion
- Move
- Copy
- Edits(only Box quick notes)
- Preview
- Rename

- Report export

“ ”

Note: Original files are attached for all the events unless the files have been deleted previously. In that case, the message about the captured event will include information about the deleted file.

“ ”

Creating a Box Application

To create a Box application:

1. Go to <https://developer.box.com/>, sign into an existing account or create a new one.
2. Click Create New App.
3. Choose Custom App and click Next.
4. Select the User Authentication (OAuth 2.0) method, enter the name of the app in the App name field, and click Create App.
5. Go to the Configuration section, copy, and save Client ID and Client Secret.
6. Add Arctera Insight Capture IP address to Redirect URI.

“ ”

Note: The Redirect URI can be found in the Click information of the collector source configuration.

“ ”

7. Set the following permissions:
 - Application Scopes:
 - Read all files and folders stored in Box
 - Write all files and folders stored in Box
 - Manage users

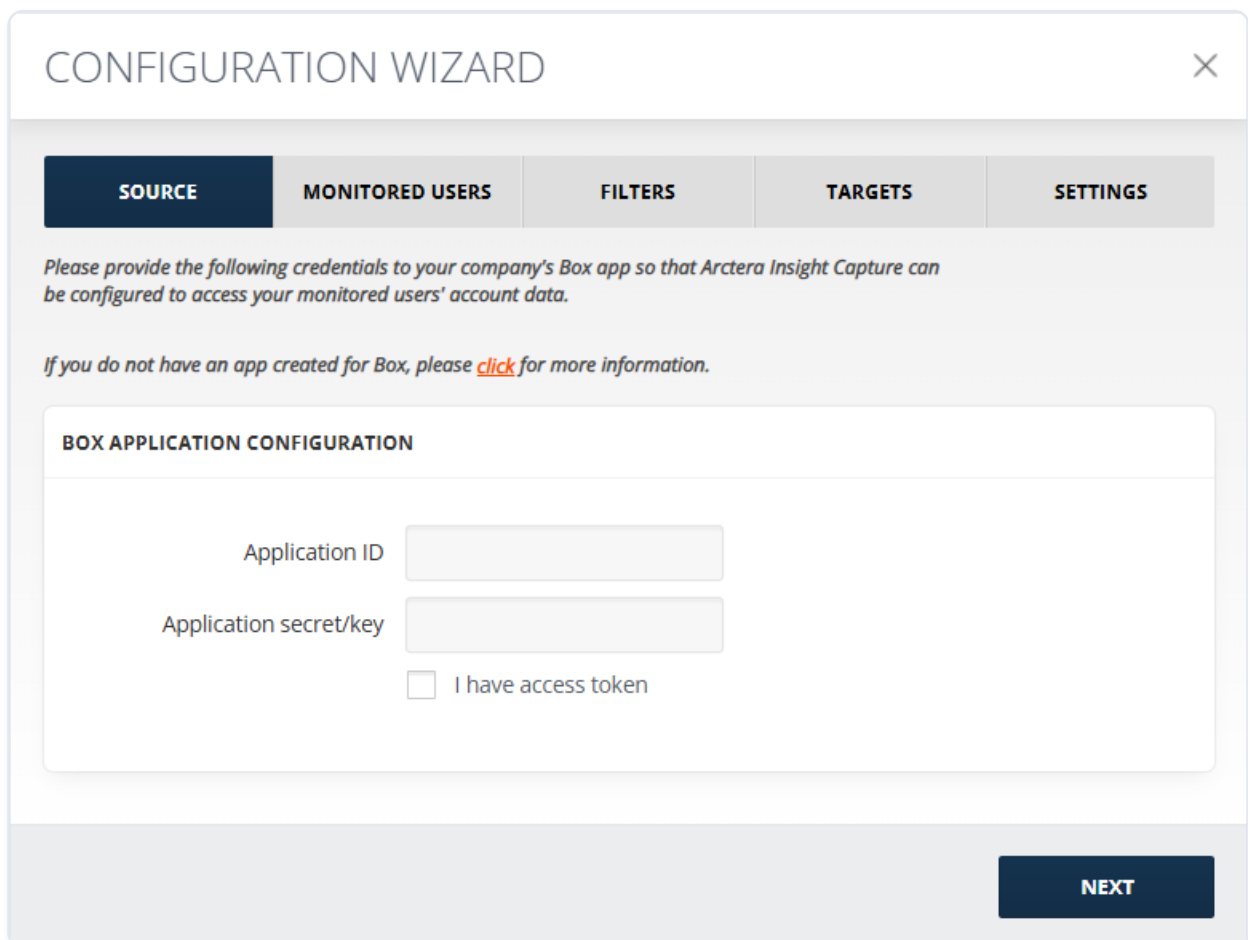
- Manage enterprise properties
- Advanced Features: Make API calls the as-user header.

8. Click Save Changes.

Source Configuration

For configuring the Box application:

1. After entering a Name and a Description (optional) for the collector and then selecting the collector from the list, in the Application ID field, add the Client ID copied previously, and in the field of Application Secret/Key, enter copied Client Secret, click NEXT.



The screenshot shows a 'CONFIGURATION WIZARD' dialog box with a close button (X) in the top right corner. The 'SOURCE' tab is selected, and the other tabs are 'MONITORED USERS', 'FILTERS', 'TARGETS', and 'SETTINGS'. Below the tabs, there is a message: 'Please provide the following credentials to your company's Box app so that Arctera Insight Capture can be configured to access your monitored users' account data.' Below this message is a link: 'If you do not have an app created for Box, please [click](#) for more information.' The main content area is titled 'BOX APPLICATION CONFIGURATION' and contains two input fields: 'Application ID' and 'Application secret/key'. Below these fields is a checkbox labeled 'I have access token'. A 'NEXT' button is located at the bottom right of the dialog box.

2. Grant access to Box in the opened pop-up window. Make sure that pop-ups are not blocked by your browser.

Additionally Processed Data

Once you are through setting up the Box application, you can also configure a few optional settings.

- If Process file downloads is checked, it will process the download file events from the events feed in Box. The files from Box are downloaded and attached to the messages. The downloads are recorded as download events in Box.
- If the Process file downloads box is checked, the download events are processed too, and again recorded as downloads in the Box, and so on. So each consequent time, the number of imported download events is increased exponentially.
- In the Skip downloads initiated by service field, the application ID that downloads the file, can be added so that the downloads done by that application are ignored and not processed. To retrieve the ID:
 - Log in to Box and navigate to Box Platform.
 - At the top right corner, click My Apps and select your application to navigate to its details page.
 - Copy the last number from the URL in the browser address field: e.g., `https://<yourdomain>.app.box.com/developers/console/app/THIS-NUMBER`.

ADDITIONALLY PROCESSED DATA

Process file downloads

Skip downloads initiated by service [How to get service id](#)

Advanced Configuration Options

To configure advanced options:

1. Specify the Subject Prefix in the subject line of imported emails. This is useful for organizing imported data, i.e., when multiple sources share a common target.

“ ”

Note: Not applicable to the EV Folder target.


“ ”


2. Specify Do not download data modified before and Do not download data modified after to allow cutting off data outside the set date range. If the before date is set to 08/17/2023 and the

after date is set to 08/25/2023, only the data between these two dates will be downloaded. Data outside that range will be ignored. Note that both options can be used independently as well.

ADVANCED CONFIGURATION OPTIONS

Subject prefix

 Do not download data modified before:
 

 Do not download data modified after:
 

Next Steps

After setting up the collector, follow the links below to continue with the configuration of:

- [Monitored Users](#)
- [Filters](#)
- [Targets](#)
- [Importer Settings](#)

CellTrust

CellTrust is a leading provider of compliant and secure mobile communications for regulated industries. CellTrust SL2™ is a communication platform for voice, text / SMS and chat that integrates with leading providers of archiving and e-discovery.

Activities Captured

- Messages

Captured messages can contain:

- Message subject
- Message headers

- Participants: From, To, CC, and BCC
- Activity datetime
- Message body

Source Configuration

For information on how to configure the following sections of the Source tab, see:

- [File Source Configuration](#)
- [PGP Configurations](#)
- [Quarantine Location](#)
- [Miscellaneous Settings](#)

Next Steps

After setting up the collector, follow the links below to continue with the configuration of:

- [Monitored Users \(N/A\)](#)
- [Filters](#)
- [Targets](#)
- [Importer Settings](#)

Chatter

Chatter is an enterprise collaboration platform from Salesforce, a cloud-based customer relationship management (CRM) vendor. The Chatter collector needs to log into the Salesforce account with an Admin user and get user personal token to import data. Besides, triggers need to be published on the Chatter site to be able to capture updates, deletions, and edits. The triggers will create a post in a channel and Insight Capture will capture the information from the channel.

Shield Platform Encryption is supported without any additional configuration, since the data is encrypted by Salesforce "At rest" and the API provides the data decrypted.

Activities Captured

- Posts
- Files
- Comments

- Shares (including group posts)
- Comments of shared posts
- Deletes and edits (require triggers)
- Links
- Polls
- Private and group chats
- Feed poll choices (If Modify all data permission is enabled)
- New event/task contact/opportunity/case/lead
- All online communication, including attachments and deleted information (if the triggers are set)

“ ”

Note: Call logs and topics are not captured.

“ ”

Creating a Salesforce Application

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

Step 1: Creating a profile

1. Login to Salesforce using an account that has the System Administrator profile and switch to Salesforce Classic (if you are using the Lightning Experience).
2. Click Setup, then expand Manage Users and click Profiles.
3. Find the Read-Only profile and click the Clone button.
4. Enter a Name in the Profile Name field and click the Save button.
5. When saved, click Edit.
6. The required administrative permissions for data collection are:
 - API Enabled
 - Select Files from Salesforce

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

7. Under General User Permissions, make sure the following permissions are enabled:

- Access Activities
- Allow View Knowledge
- Knowledge One

8. Under Standard Object Permissions, disable all the Create, Edit, Delete and Modify All options. Only the Read and View All permissions should stay.

9. Scroll down and click Save.

Step 2: Creating a User (Service Account)

1. Go to the Users page and click New User.
2. Fill out the required fields and select Salesforce as User License, and the profile will be created, then scroll down and click Save.

Step 3: Retrieving Access Token

1. Click your Username at the top right corner of the screen and select My Settings.
2. In the navigation pane to the left, under the Personal section, choose Reset My Security Token, then click Reset Security Token. The new token will be sent to the email associated with your account.

To collect deleted or updated comments and posts in Chatter, ask your Salesforce administrator to perform the following steps in the Chatter UI:

1. Create a new Private Group ensuring they do not automatically archive this group and Private option and Broadcast Only are selected.
2. Locate and make a note of the Group ID in the page URL.
3. Create a new label Private Group Id.
 - Go to Setup > Custom Labels.

- Click New Custom Label.
- For Short Description - Private Group Id.
- Value - Insert Group Id of Private group.

To install triggers:

1. Create a new label named as Private Group Id.

- Go to Setup > Custom Labels.
- Click New Custom Label.
- Fill in the Short Description, Name, and Value fields.

2. Create Apex Classes.

- Go to Setup > Apex Classes.
- Click New.
- Insert content from desired class (You can find all classes in classes folder) and click Save.

The following is the order in which all classes should be added.

TriggerHandler.cls

TriggerHandlerTest.cls

ContentVersionManager.cls

FeedCommentManager.cls

FeedItemManager.cls

ContentVersionTriggerHandler.cls

FeedCommentTriggerHandler.cls

FeedItemTriggerHandler.cls

ContentVersionTriggerTest.cls

FeedCommentTriggerTest.cls

FeedItemTriggerTest.cls

1. Create Apex Triggers.

- Go to Setup > Apex Triggers.
- Click New.
- Insert content from desired class.
- Click Save.

The following is the order in which all classes should be added.

```
ContentVersionTrigger.trigger
```

```
FeedCommentTrigger.trigger
```

```
FeedItemTrigger.trigger
```

Source Configuration

For Chatter configuration:

1. Enter the Username and Password of the Chatter Admin account used for app creation.
2. Enter the previously copied Security Token.
3. Specify the days for messages that should be processed.

CHATTER CONFIGURATION

Username

Password

Security token

Process messages in the last days

Advanced Configuration Options

To configure advanced options:

1. Specify the Subject Prefix in the subject line of imported emails. This is useful for organizing imported data, i.e., when multiple sources share a common target.

“ ”

Note: Not applicable to the EV Folder target.


“ ”

- Specify Do not download data modified before and Do not download data modified after to allow cutting off data outside the set date range. If the before date is set to 08/17/2023 and the after date is set to 08/25/2023, only the data between these two dates will be downloaded. Data outside that range will be ignored. Note that both options can be used independently as well.


ADVANCED CONFIGURATION OPTIONS

Subject prefix

Do not download data modified before:



Do not download data modified after:



Next Steps

After setting up the collector, follow the links below to continue with the configuration of:

- [Monitored Users](#)
- [Filters](#)
- [Targets](#)
- [Importer Settings](#)

Chatter Cipher Cloud

Chatter is an enterprise collaboration platform from Salesforce, a cloud-based customer relationship management (CRM) vendor. The Chatter collector needs to log into the Salesforce account with an Admin user and get user personal token to import data. Besides, triggers need to

be published on the Chatter site to be able to capture updates, deletions, and edits. The triggers will create a post in a channel and Insight Capture will capture the information from the channel.

Shield Platform Encryption is supported without any additional configuration, since the data is encrypted by Salesforce "At rest" and the API provides the data decrypted.

Activities Captured

- Posts
- Files
- Comments
- Shares (including group posts)
- Comments of shared posts
- Deletes and edits (require triggers)
- Links
- Polls
- Private and group chats
- Feed poll choices (If Modify all data permission is enabled)
- New event/task contact/opportunity/case/lead
- All online communication, including attachments and deleted information (if the triggers are set)

“ ”

Note: Call logs and topics are not captured.

“ ”

Creating a Salesforce Application

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

Step 1: Creating a profile

1. Login to Salesforce using an account that has the System Administrator profile and switch to Salesforce Classic (if you are using the Lightning Experience).
2. Click Setup, then expand Manage Users and click Profiles.
3. Find the Read-Only profile and click the Clone button.
4. Enter a Name in the Profile Name field and click the Save button.
5. When saved, click Edit.
6. The required administrative permissions for data collection are:
 - API Enabled
 - Select Files from Salesforce
 - Manage Chatter Messages and Direct Messages
 - Manage Unlisted Groups (Required only if the Unlisted Groups feature is enabled in the given Salesforce environment.)
 - View All Data
 - Modify All Data (Only if capturing Feed poll Choices is required, otherwise can be ignored but errors will be present in the collector log. This is a limitation from Salesforce)
7. Under General User Permissions, make sure the following permissions are enabled:
 - Access Activities
 - Allow View Knowledge
 - Knowledge One
8. Under Standard Object Permissions, disable all the Create, Edit, Delete and Modify All options. Only the Read and View All permissions should stay.
9. Scroll down and click Save.

Step 2: Creating a User (Service Account)

1. Go to the Users page and click New User.
2. Fill out the required fields and select Salesforce as User License, and the profile will be created, then scroll down and click Save.

Step 3: Retrieving Access Token

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

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

To collect deleted or updated comments and posts in Chatter, ask your Salesforce administrator to perform the following steps in the Chatter UI:

1. Create a new Private Group ensuring they do not automatically archive this group and Private option and Broadcast Only are selected.
2. Locate and make a note of the Group ID in the page URL.
3. Create a new label Private Group Id.
 - Go to Setup > Custom Labels.
 - Click New Custom Label.
 - For Short Description - Private Group Id.
 - Value - Insert Group Id of Private group.

To install triggers:

1. Create a new label named as Private Group Id.
 - Go to Setup > Custom Labels.
 - Click New Custom Label.
 - Fill in the Short Description, Name, and Value fields.
2. Create Apex Classes.
 - Go to Setup > Apex Classes.
 - Click New.
 - Insert content from desired class (You can find all classes in classes folder) and click Save.

The following is the order in which all classes should be added.

```
TriggerHandler.cls
```

```
TriggerHandlerTest.cls
```

```
ContentVersionManager.cls
```

```
FeedCommentManager.cls
```

`FeedItemManager.cls``ContentVersionTriggerHandler.cls``FeedCommentTriggerHandler.cls``FeedItemTriggerHandler.cls``ContentVersionTriggerTest.cls``FeedCommentTriggerTest.cls``FeedItemTriggerTest.cls`

1. Create Apex Triggers.

- Go to Setup > Apex Triggers.
- Click New.
- Insert content from desired class.
- Click Save.

The following is the order in which all classes should be added.

`ContentVersionTrigger.trigger``FeedCommentTrigger.trigger``FeedItemTrigger.trigger`

Source Configuration

For Chatter configuration:

1. Specify Host.
2. Enter the Username and Password of the Chatter Admin account used for app creation.
3. Enter the previously copied Security Token.
4. Specify the days for messages that should be processed.

CHATTER CIPHER CLOUD CONFIGURATION

Host	<input type="text"/>
Username	<input type="text"/>
Password	<input type="text"/>
Security token	<input type="text"/>
Process messages in the last	<input type="text" value="1"/> days

Advanced Configuration Options

To configure advanced options:

1. Specify the Subject Prefix in the subject line of imported emails. This is useful for organizing imported data, i.e., when multiple sources share a common target.

“ ”

Note: Not applicable to the EV Folder target.


“ ”

2. Specify Do not download data modified before and Do not download data modified after to allow cutting off data outside the set date range. If the before date is set to 08/17/2023 and the after date is set to 08/25/2023, only the data between these two dates will be downloaded. Data outside that range will be ignored. Note that both options can be used independently as well.


ADVANCED CONFIGURATION OPTIONS

Subject prefix

Do not download data modified before:



Do not download data modified after:



Attachments Configuration

- When the Ignore Attachments checkbox is enabled, all the attachments are excluded from the message which will enhance the collector performance. Each message will contain only information and the link of the excluded attachment.
- 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 Custom Message field, a text for those excluded files can be specified. E.g., "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.

ATTACHMENTS CONFIGURATION

Do not download files greater than megabyte(s).

Custom message

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.

File types

Custom message

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.

Next Steps

After setting up the collector, follow the links below to continue with the configuration of:

- [Monitored Users](#)
- [Filters](#)
- [Targets](#)
- [Importer Settings](#)

Cisco Webex Teams

Cisco Webex Teams enables people to meet, message, share, whiteboard, and call in a secure way, that meets legal, regulatory, and compliance mandates, and provides comprehensive business insights. All Cisco Webex Teams meetings allow screen sharing and a variety of tools for interactive creative work.

Activities Captured

- Direct messages during a call
- Persistent chats and channels
- Group members in a group or persistent chat

- Attachments

“ ”

Note: Deleted attachments are not captured due to API temporary limitations.

“ ”

- Emojis
- Edited/Deleted messages
- Conversations related to all newly added users
- Message threading/post threading/group chats threading

“ ”

Note: The Webex environment allows inviting users from the other networks/domains (i.e., external users). These users can then create groups and teams like internal users. The chats/teams created by the External users are stored outside of the internal domain, i.e., in the Consumer organization storage. Consumer Organization owns this space. So, the data in the external domain are not captured by the collector.

“ ”

Creating Cisco Webex Teams Application

To create an app:

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

“ ”

Note: The account should have the Full administrator permission and be a Compliance Officer. Permissions for full administrator privileges can be checked at <https://admin.webex.com/users>>Select User>Administrator Roles under Organization Administrator Roles and Functional Administrator Roles accordingly.

“ ”

2. When you are 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 the Redirect URL.

“ ”

Note: This can be found in the click information of theSourceconfiguration.

“ ”

6. Scroll down and select the following scopes:
 - 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_read
 - spark-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 them in a secure location.

Source Configuration

To configure the collector:

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** | **FILTERS** | **TARGETS** | **SETTINGS**

Please provide the following credentials to your company's Microsoft Teams via Webhooks app so that Arctera Insight Capture can be configured to access your monitored users' account data.

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

MICROSOFT TEAMS VIA WEBHOOKS APPLICATION CONFIGURATION

Application ID

Application secret/key

NEXT

Timestamp Formatting

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 Date Time Format drop-down list.

TIME STAMP FORMATTING

Primary time zone

(UTC-08:00) Pacific Time (US & Canada) (PST)

Secondary time zone

Date time format

March 29 at 09:31 PM

Miscellaneous Settings

- The Subject Prefix is added to the subject line of imported emails. This is useful for organizing imported data, i.e., when multiple sources share a common target.

“ ”

Note: Not applicable to the EV Folder target.

“ ”

- If the option Merge Messages by Thread is enabled, Arctera Insight Capture retrieves the data from a thread and archives it as one message.
- 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 08/17/2021 and the after date is set to 08/25/2021, only the data between these two dates will be downloaded. Data outside that time frame will be ignored. Note that both options can be used independently as well.

MISC SETTINGS


Subject prefix


Merge messages by thread

Message time zone

(UTC-08:00) Pacific Time (US & Canada) (PST)
▼

Process incomplete days

Do not download data modified before: 

Do not download data modified after: 

Splitting Messages

Check the Splitting 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.

SPLITTING MESSAGES Split messages (MB) Max size for each part of splitted message

Split size must be an integer

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. E.g., "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.

ATTACHMENTS CONFIGURATION Do not download files greater than megabyte(s).

Custom message

**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.**

File types

Custom message

**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.**

Next Steps

After setting up the collector, follow the links below to continue with the configuration of:

- [Monitored Users](#)
- [Filters](#)

- [Targets](#)
- [Importer Settings](#)

Citrix Workspace & ShareFile

Citrix Workspace & ShareFile provides secure file sharing, storage, sync and more - all built for business. The Citrix Workspace & ShareFile collector does not capture ShareFile activities for clients. The collector requires a service account to create the API.

Activities Captured

- Files - uploaded/deleted/archived/downloaded/viewed (Audio_Listen and Video_View for MP3/MP4 file types accordingly)/shared (including encrypted messages)/moved/checked in/out
- Folders - created/moved (currently, only the activity is captured)/shared/deleted
- Login info
- Share file requests
- Text-only messages
- Share file request message
- Revoked messages

“ ”

Note: We recommend using the owner account for authentication. Note that activities performed by the user of the Org. Owner account are not captured.

“ ”

Notes

- We can upload several files with the same name in File Box. The generated report contains only path info for the uploaded files, which is the same for all the items having the same name. Hence, Arctera Insight Capture attaches the same file (the latest among the ones with the same name) to all the generated messages.
- If files having the same name are downloaded, in all the generated messages we will have the same file attached. The reason for this issue is the same, as for the File upload. If the file is permanently deleted/archived, the activity is not captured.

- In case files are sent via Outlook and the shared information is not recorded in the Citrix environment, the captured message will have an empty body.

Creating Citrix Workspace & ShareFile App

To create an app:

1. Navigate to <https://api.sharefile.com/rest/>.
2. Log into your Citrix ShareFile account.

“ ”

Note: The account should be a Service Account.

“ ”

3. Click Get an API Key.
4. Fill in the Application Name field.
5. In the Redirect URI field, add the redirect URL address.

“ ”

Note: This can be found in the click information of theSourceconfiguration.

“ ”

6. Click Generate API Key.
7. Copy the generated Client Id and Client Secret and save it in a secure location.

Granting Permissions

To be able to capture data, Org Owner must give the Access other users' File Boxes and Sent Items specific permission.

To grant the permission:

1. Navigate to your ShareFile instance.
2. Log into your Citrix ShareFile Org Owner account.

3. Go to People > Browse Employees.
4. Select the employee to which the permission must be granted.
5. Scroll down to Employee User Settings and click User Access.
6. In the Files and Folder sub-section, enable the Access other users' File Boxes and Sent Items checkbox.
7. 7\.. Scroll down and click Save Changes.

Source Configuration

To configure the collector:

1. In the Application ID field, fill in the copied Client Id.
2. In the Application Secret/Key field, fill in the copied Client Secret.
3. Add subdomain of the ShareFile workspace into the SubDomain field. (SubDomain is located under Admin settings > Company info > Edit company Branding).

CONFIGURATION WIZARD

SOURCE | MONITORED USERS | FILTERS | TARGETS | SETTINGS

Please provide the following credentials to your company's Citrix Workspace & ShareFile app so that Arctera Insight Capture can be configured to access your monitored users' account data.

If you do not have an app created for Citrix Workspace & ShareFile, please [click](#) for more information.

CITRIX WORKSPACE & SHAREFILE APPLICATION CONFIGURATION

Application ID

Application secret/key

Subdomain

I have access token

NEXT

Activities to Be Processed

You can choose which activities are processed from Citrix Workspace & ShareFile.

ACTIVITIES TO BE PROCESSED

ACTIVITIES

Archive only ShareFile shared files

Archive all activities in ShareFile

Archive only certain selection of activities in ShareFile

Upload

Download/View

Folder create

Check in/Check out

Edit

Delete/Archive

Login

Move

File share

Share file requests

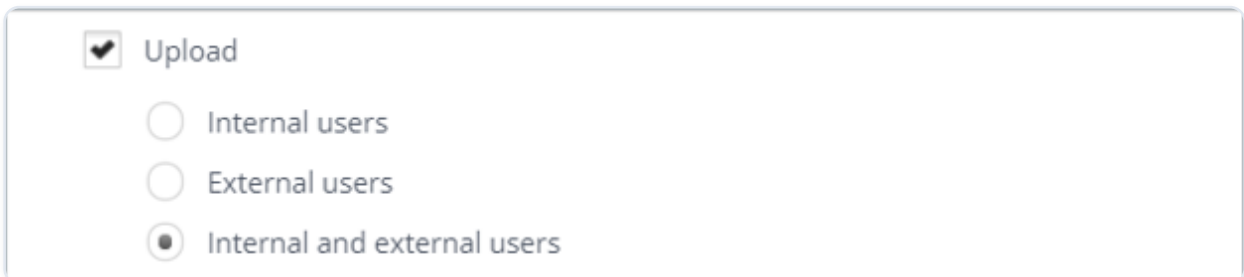
Text-only messages

- Archive only ShareFile shared files - Only shared files are imported.
- Archive all activities in ShareFile \- All activities are captured and imported.
- Archive only certain selection of activities in ShareFile \- Activities to be captured and imported can be selected separately from the list below:
 - Upload
 - Download/View
 - Folder create
 - Check in/Check out
 - Edit
 - Delete/Archive
 - Login
 - Move

- File share
- Share file requests
- Text-only messages

In case Upload activity is activated, the following options become available:

- Internal users - when enabled, only the upload activity of internal users will be captured
- External users - when enabled, only the upload activity of external users will be captured
- Internal and external users - when enabled, the upload activity of both the internal and external user will be captured.



The screenshot shows a configuration panel for 'Upload' activity. At the top, there is a checked checkbox labeled 'Upload'. Below it, there are three radio button options: 'Internal users', 'External users', and 'Internal and external users'. The 'Internal and external users' option is selected, indicated by a filled circle next to it.

Advanced Configuration Options

To configure advanced options:

1. Specify the Subject Prefix in the subject line of imported emails. This is useful for organizing imported data, i.e., when multiple sources share a common target.

“ ”

Note: Not applicable to the EV Folder target.

“ ”

2. Specify Do not download data modified before and Do not download data modified after to allow cutting off data outside the set date range. If the before date is set to 08/17/2021 and the after date is set to 08/25/2021, only the data between these two dates will be downloaded. Data outside that time frame will be ignored. Note that both options can be used independently as well.

ADVANCED CONFIGURATION OPTIONS

Subject prefix

Do not download data modified before:

Do not download data modified after:

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. E.g., "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.

ATTACHMENTS CONFIGURATION

Do not download files greater than megabyte(s).

Custom message

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.

File types

Custom message

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.

Next Steps

After setting up the collector, follow the links below to continue with the configuration of:

- [Monitored Users](#)
- [Filters](#)
- [Targets](#)
- [Importer Settings](#)

Cloud9

Cloud9 Symphony is a unified communication and data capture platform designed for financial markets, enabling firms to securely store and analyze voice, video, and messaging interactions for trading, compliance, and auditing.

The Cloud9 collector allows organizations to capture and archive Cloud9 Symphony communications, integrating them into existing compliance and data retention systems. This ensures seamless access, regulatory compliance, and efficient management of critical financial interactions.

Activities Captured

- [Calls](#)

Setting up Cloud9

The Firm Admin of your organization must complete the following steps to generate an App Key and Secret in Cloud9.

1. Sign in to [Cloud9 Portal](#).
2. In the left-hand navigation pane, click API Keys.
3. Under Manage your Cloud9 API Keys, select the firm.
4. Click Generate API Key.

To generate a Call Data App Key and App Secret

1. From the API drop-down list, select Calls Data.
2. Choose the appropriate Environment.
3. Enter allowed IP addresses in the Whitelisted IP(s) field.

“ ”

Note: For more information, see [How to allow IP addresses for correct operation of Arctera Insight Capture](#).

“ ”

4. Enter the relevant email(s) under Owner Email(s).
5. Under Scope of Access, select Read-Only, then choose the following permissions:
 - metadata
 - recordings
6. Click Generate Key & Secret. Copy and securely store the generated Call Data API Key and Call Data Secret Key for source configuration.

To generate a Management App Key and App Secret:

1. From the API drop-down list, select Management.
2. Choose the appropriate Environment.
3. Enter allowed IP addresses in the Whitelisted IP(s) field.

“ ”

Note: For more information, see [How to allow IP addresses for correct operation of Arctera Insight Capture](#).

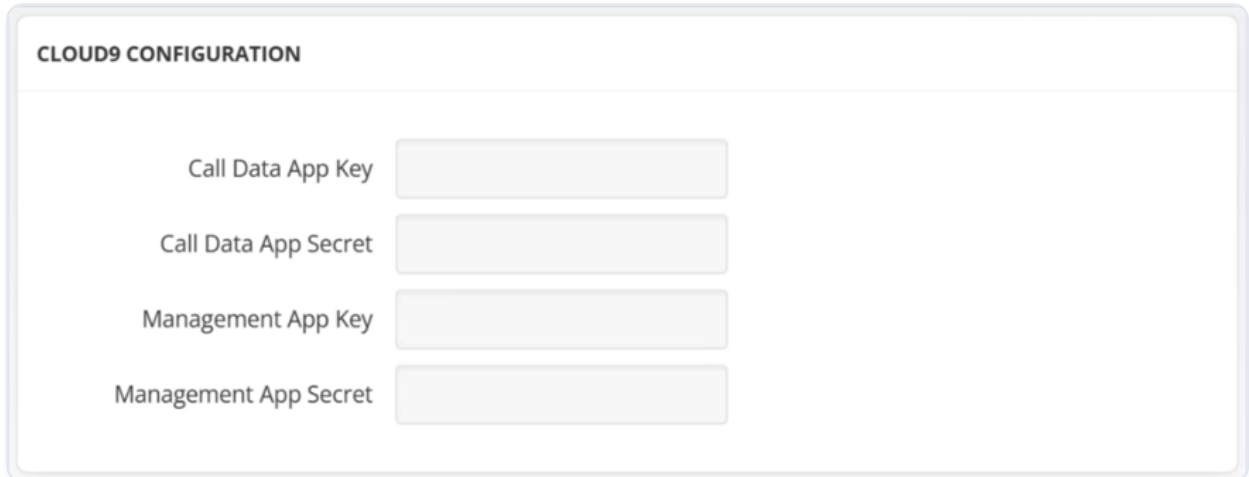
“ ”

4. Enter the relevant email(s) under Owner Email(s).
5. Under Scope of Access, select Read-Only, then choose the following permission:
 - users
6. Click Generate Key & Secret. Copy and securely store the generated Management API Key and Management Secret Key for source configuration.

Source Configuration

To configure the Cloud9 application in Arctera Insight Capture:

1. Enter the saved Call Data API Key and Call Data Secret Key.
2. Enter the saved Management API Key and Management Secret Key.



The screenshot shows a configuration window titled "CLOUD9 CONFIGURATION". It contains four input fields arranged vertically, each with a label to its left: "Call Data App Key", "Call Data App Secret", "Management App Key", and "Management App Secret". All input fields are currently empty.

Advanced Configuration Options

To configure the advanced options:

1. Specify the Subject Prefix in the subject line of imported emails. This feature allows organizing imported data when multiple sources share a common target.

“ ”


Note: Not applicable to the EV Folder target.


“ ”

2. Specify Do not download data modified before and Do not download data modified after to allow cutting off data outside the set date range. If the before date is set to 08/17/2022 and the after date is set to 08/25/2022, only the data between these two dates will be downloaded. Data outside that time frame will be ignored. Note that both options can be used independently as well.

ADVANCED CONFIGURATION OPTIONS

Subject prefix

Do not download data modified before:
 

Do not download data modified after:
 

Attachments Configuration

If Include original data as attachment is enabled, the JSON file will be attached to the output message.

ATTACHMENTS CONFIGURATION

Include original data as attachment

Next Steps

After setting up the collector, follow the links below to continue with the configuration of:

- [Monitored Users](#)
- [Filters](#)
- [Targets](#)
- [Importer Settings](#)

Copilot

Copilot is an advanced AI-powered productivity assistant designed to enhance workplace efficiency by integrating seamlessly with Microsoft 365 applications. It helps users generate content, summarize information, automate tasks, and interact with enterprise data using natural language.

The Copilot collector captures Copilot-generated interactions, including prompts, responses, and contextual metadata. This enables organizations to archive AI-assisted communications for compliance, auditing, and knowledge management purposes. By integrating with enterprise archiving systems, the Copilot collector ensures transparency and governance in AI-driven workflows.

“ ”

Note: Copilot Studio is not supported by the collector.

“ ”

Activities Captured

- User prompts
- AI responses

“ ”

Note: Messages may include attachments in case Copilot has been used directly within the document.

“ ”

Creating a Microsoft Entra ID Application

To authenticate via OAuth during the collector configuration, you need to create a Microsoft Entra ID Application.

To create an app:

1. Create an O365 account and open [Azure Portal](#) using the same credentials as for O365 (Global Admin).
2. Click Microsoft Entra ID at the top of the page and select App Registration from the left-side navigation pane.
3. Click the +New registration button.
4. Enter a Name for the application and click Register.

5. Find and make a note your Application (client) ID and Directory(tenant) ID as this is needed for configuring the collector in Arctera Insight Capture.
6. In the navigation pane to the left, go to Certificates & secrets.
7. Click the Upload certificate button.
8. Select a certificate (public key) with one of the following file types: .cer,.pem, .crt, and click Add. For more information on how to create a certificate, see [Creating a Certificate \(Private and Public Keys\)](#).

Microsoft Entra ID Permissions

For permissions:

1. In the navigation pane to the left, click API permissions.
2. Click Microsoft Graph, and in the opened pane select Application permissions.
3. Get back to API permissions section, click \+ Add a permission, select Graph API and then Application permissions. These are the permissions you need to grant:
 - AiEnterpriseInteraction: AiEnterpriseInteraction.Read.All
 - User: User.Read.All
4. Grant all the above-mentioned permissions.
5. Get back to API permissions section, click \+ Add a permission, select SharePoint and then Application permissions. These are the permissions you need to grant:
 - Sites: Sites.Read.All
 - TermStore: TermStore.Read.All
 - User: User.Read.All
6. Grant all the above-mentioned permissions.

Source Configuration

For configuring the Copilot application:

1. Add the previously saved Directory (tenant) ID and Application (client) ID in the Directory ID and Application ID fields, respectively.
2. Click the Select button to upload the certificate and provide X.509 Certificate password. Click Next.

CONFIGURATION WIZARD ×

SOURCE | **MONITORED USERS** | **TARGETS** | **SETTINGS**

Please provide the following credentials to your company's Copilot app so that Arctera Insight Capture can be configured to access your monitored users' account data.

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

COPILOT APPLICATION CONFIGURATION

Directory ID	<input type="text"/>
Application ID	<input type="text"/>
X.509 Certificate file	SELECT
X.509 Certificate password	<input type="text"/>

NEXT

Timestamp Formatting

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 Date Time Format drop-down list.

TIME STAMP FORMATTING

Primary time zone

(UTC-08:00) Pacific Time (US & Canada) (PST) Secondary time zone

Date time format

*March 29 at 09:31 PM***Advanced Configuration Options**

To configure advanced options:

1. Specify the Subject Prefix in the subject line of imported emails. This is useful for organizing imported data, i.e., when multiple sources share a common target.

“ ”


Note: Not applicable to the EV Folder target.


“ ”

2. Specify Do not download data modified before and Do not download data modified after to allow cutting off data outside the set date range. If the before date is set to 08/17/2024 and the after date is set to 08/25/2024, only the data between these two dates will be downloaded. Data outside that time frame will be ignored. Note that both options can be used independently as well.

ADVANCED CONFIGURATION OPTIONS

Subject prefix

Do not download data modified before:
 

Do not download data modified after:
 

Message Body

This setting determines how imported messages are displayed in the target. There are the following output message body options:

- HTML: Displays the message in HTML format.
- Pure body: Displays the output message as plain text, without formatting or additional details.

MESSAGE BODY

HTML

Pure body

Attachments Configuration

- Include original data as attachment: If checked, the message original data is attached to the output file.

« »

Note: Not applicable to the EV Folder target.

« »

- Ignore attachments: If checked, all the attachments are excluded from the message enhancing the collector performance. Each message will contain info and the link to the excluded attachment.
- 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 Custom Message field, a text for those excluded files can be specified. E.g., "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.

ATTACHMENTS CONFIGURATION

Include original data as attachment

Ignore attachments

Do not download files greater than megabyte(s).

Custom message

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.

File types

Custom message

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.

Next Steps

After setting up the collector, follow the links below to continue with the configuration of:

- [Monitored Users](#)

- [Filters](#)
- [Targets](#)
- [Importer Settings](#)

Dropbox Business

Dropbox Business is a cloud-based file storage system. It is a secure storage for all your tools, content, and collaborators. This platform keeps your teams productive and your content safe by driving transformation across industries.

Activities Captured

- Files and file operations \- added/copied/deleted/downloaded/edited/moved/ permanently deleted/renamed/restored/reverted/rolled back
- Comments \- added/deleted/edited
- Sharing:
 - Shared content - add invitees/add members
 - Shared content - copy, view, unshare
 - Shared folder - create/mount/unmount
 - Shared link - copy/create/download/view

“ ”

Note: Events generated by external (anonymous) users are not captured.

“ ”

Creating a Dropbox Application

The owner of your organization's Dropbox folder must perform these steps to create a Dropbox application.

To create an app:

1. Log in to Dropbox and navigate to <https://www.dropbox.com/developers>.
2. At the top right corner, click App console.

3. Click Create app.
4. Choose an API: Scoped access and the type of access you need: Full Dropbox - Access to all files and folders in a user's Dropbox.
5. Name your app and click Create app.
6. On the opened Settings tab, copy and save the App key and App secret and then in the Redirect URIs field, add the redirect URL address.

“ ”

Note: This can be found in the click information of theSourceconfiguration.

“ ”

Source Configuration

To configure the Dropbox Business collector:

1. In the Application ID field, add the App Key copied previously, and in Application Secret/Key, enter the copied Secret, click NEXT.

CONFIGURATION WIZARD

SOURCE MONITORED USERS FILTERS TARGETS SETTINGS

Please provide the following credentials to your company's Dropbox Business app so that Arctera Insight Capture can be configured to access your monitored users' account data.

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

DROPBOX BUSINESS APPLICATION CONFIGURATION

Application ID

Application secret/key

I have access token

NEXT

- Grant Access to Box in the opened pop-up window. Make sure that pop-ups are not blocked by your browser.

Timestamp Formatting

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 Date time Format drop-down list.

TIME STAMP FORMATTING

Primary time zone

(UTC-08:00) Pacific Time (US & Canada) (PST)

 Secondary time zone

Date time format

March 29 at 09:31 PM

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. E.g., "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.

ATTACHMENTS CONFIGURATION Do not download files greater than megabyte(s).

Custom message

This message will be added to the email body.

**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.**

File types

Custom message

This message will be added to the email body.

**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.**

Advanced Configuration Options

To configure advanced options:

1. Specify the Subject Prefix in the subject line of imported emails. This is useful for organizing imported data, i.e., when multiple sources share a common target.

“ ”

Note: Not applicable to the EV Folder target.


“ ”

2. Specify Do not download data modified before and Do not download data modified after to allow cutting off data outside the set date range. If the before date is set to 08/17/2023 and the after date is set to 08/25/2023, only the data between these two dates will be downloaded. Data outside that range will be ignored. Note that both options can be used independently as well.


ADVANCED CONFIGURATION OPTIONS

Subject prefix

Do not download data modified before:



Do not download data modified after:



Next Steps

After setting up the collector, follow the links below to continue with the configuration of:

- [Monitored Users](#)
- [Filters](#)
- [Targets](#)

- [Importer Settings](#)

Dubber Speik Recordings

Dubber Speik unified data capture and streaming engine not only captures conversation data (video, chat, SMS, voice) across your networks but also from any OTT Unified Communications platform.

“ ”

Note: Please reach out to your Dubber Speik representative to obtain your credentials.

“ ”

Activities Captured

- Microsoft Teams calls
- Mobile phone calls

“ ”

Note: These activities must be recorded by Dubber Speik.

“ ”

Source Configuration

“ ”

Note: These credentials should be provided to configure the Dubber Speik Recordings collector. Reach out to your Dubber/Speik representative to obtain your credentials.

“ ”

Source Type

For Source Type configuration:

1. Enable Microsoft Teams to collect recordings from Microsoft Teams.
2. Enable Mobile Phone to collect recordings from mobile phone calls.

SOURCE TYPE
 Microsoft Teams
 Mobile Phone

Dubber Speik Recordings Configuration

For Dubber Speik Recordings Configuration:

1. Enter Dubber Speik Username and Password.
2. Enter Speik AccountId.
3. Enter Speik Solution InstanceId and Speik base URL.

DUBBER SPEIK RECORDINGS CONFIGURATION

Username
Password
Speik AccountId
Speik Solution InstanceId
Speik base URL

Department Filtration

To customize how departments are monitored, select one of the following options:

- Monitor all departments: All departments will be monitored. No further input is required.
- Monitor all except selected departments: Monitoring will exclude the departments you specify. A CSV upload interface will appear to allow you to provide the list of departments to exclude.

- Monitor only selected departments: Monitoring will be limited to the departments you specify. A CSV upload interface will appear to allow you to provide the list of departments to include.

DEPARTMENT FILTRATION

Monitor all departments
 Monitor all except selected departments
 Monitor only selected departments

File *

Download file

To ensure proper functionality, uploaded CSV files must meet the following criteria:

- File Format: Must be a CSV file.
- File Size: Must be greater than 0 KB. Empty files will be rejected.
- Content Structure: Must contain a single column listing department names. No headers or additional columns are allowed.

Advanced Configuration Options

There are the following advanced options:

- The Subject Prefix feature will add a prefix before the message subject to facilitate the search in the target.

“ ”

Note: Not applicable to the EV Folder target.

“ ”

- 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 08/17/2023 and the after date is set to 08/25/2022, only the data between these dates will be downloaded. Data outside that time frame will be ignored.


“ ”


Note: Both options can be used independently as well.

“ ”

- The Include original data as attachment feature allows including/excluding original data as attachment by enabling/disabling the corresponding checkbox.

ADVANCED CONFIGURATION OPTIONS

Do not download data modified before: 

Do not download data modified after: 

Include original data as attachment

Next Steps

After setting up the collector, follow the links below to continue with the configuration of:

- [Monitored Users \(N/A\)](#)
- [Filters](#)
- [Targets](#)
- [Importer Settings](#)

Dubber Speik SMS

Dubber Speik unified data capture and streaming engine not only captures conversation data (video, chat, SMS, voice) across your networks but also from any OTT Unified Communications platform.

“ ”

Note: Please reach out to your Dubber Speik representative to obtain your credentials.

“ ”

Activities Captured

- SMSs

Source Configuration

To set up the collector in Arctera Insight Capture, please reach out to your Dubber Speik representative to obtain your credentials.

Dubber Speik SMS Configuration

For Dubber Speik SMS Configuration:

1. Enter Dubber Speik Username and Password.
2. Enter Speik AccountId.
3. Enter Speik Solution InstanceId and Speik base URL.

DUBBER SPEIK SMS CONFIGURATION

Username	<input type="text"/>
Password	<input type="password"/>
Speik AccountId	<input type="text"/>
Speik Solution InstanceId	<input type="text"/>
Speik base URL	<input type="text" value="https://uk.speik.com/"/>

“ ”

Note: These credentials should be provided to configure the Dubber Speik SMS collector. Please reach out to your Dubber/Speik representative to obtain your credentials.

“ ”

Advanced Configuration Options

There are the following advanced options:

- The Subject Prefix feature will add a prefix before the message subject to facilitate the search in the target.

“ ”

Note: Not applicable to the EV Folder target.

“ ”

- 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 08/17/2023 and the after date is set to 08/25/2022, only the data between these dates will be downloaded. Data outside that time frame will be ignored.


“ ”


Note: Both options can be used independently as well.

“ ”

- The Include original data as attachment feature allows including/excluding original data as attachment by enabling/disabling the corresponding checkbox.

ADVANCED CONFIGURATION OPTIONS

Do not download data modified before: 

Do not download data modified after: 

Include original data as attachment

Next Steps

After setting up the collector, follow the links below to continue with the configuration of:

- [Monitored Users \(N/A\)](#)
- [Filters](#)
- [Targets](#)
- [Importer Settings](#)

EML

The EML collector is used for importing EML data from Symphony. EML format is widely used by various compliance and archiving solutions and helps the organization avoid the need to develop a specific-source parser. The collector is used for importing EML data from Symphony. Files with the MD5 extension should be excluded from the import, as content from Symphony is exported in a single ZIP file containing EML files for each active conversation. There are some drawbacks in using EML instead of the Symphony collector for processing files from Symphony. They include:

- EML does not have a subject line to do conversation threading when searching.
- EML has poorer look (XML to HTML looks better than EML).
- EML misses information about room created, when joined, etc..

Advanced Configuration

This section allows threading based on:

- From
- Cc
- Subject
- To
- BCC
- Date

ADVANCED CONFIGURATION

THREAD BY

<input type="checkbox"/> From	<input type="checkbox"/> To
<input type="checkbox"/> Cc	<input type="checkbox"/> Bcc
<input type="checkbox"/> Subject	<input type="checkbox"/> Date

Custom headers (comma delimited)

You can also specify a custom header (comma-delimited) in the corresponding field.

Source Configuration

For information on how to configure the following sections of the Source tab, see:

- [File Source Configuration](#)
- [PGP Configurations](#)
- [Quarantine Location](#)
- [Miscellaneous Settings](#)

Timestamp Formatting

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 Date Time Format drop-down list.

TIME STAMP FORMATTING

Primary time zone

(UTC-08:00) Pacific Time (US & Canada) (PST) ▼

Secondary time zone

▼

Date time format

March 29 at 09:31 PM ▼

Next Steps

After setting up the collector, follow the links below to continue with the configuration of:

- [Monitored Users \(N/A\)](#)
- [Filters](#)
- [Targets](#)
- [Importer Settings](#)

EWS

Exchange Web Services (EWS) is an application program interface (API) that allows programmers to access Microsoft Exchange items such as calendars, contacts, and email. EWS, which first became available in Exchange Server 2007, provides administrators with the flexibility to store, retrieve, move, and modify email and related data for a single user, a group of users or an entire Exchange Server organization on an Exchange server. EWS can be useful for migrating Exchange data on-premises or to a third-party host in the cloud.

Arctera Insight Capture retrieves data from Exchange servers via EWS.

Activities Captured

- Messages
- Meeting requests
- Meeting cancellations
- Appointments

Providing Necessary Permissions to the Account

To provide necessary permissions:

1. Go to Admin Portal.
2. Log into your account if you are not logged in yet.
3. Open Exchange admin center and go to permissions.
4. Double click Discovery Management to open its settings.
5. Click + under the Roles section to add roles.
6. Add ApplicationImpersonation, Mailbox Import Export, and Mailbox Search to select the administrator roles that correspond to the Exchange features and services that members of this role group should have permissions to manage and click OK.

“ ”

Note: Impersonator user must have Mailbox Search permission if on the Monitored users tab ALL is selected.

“ ”

7. Click + under Members section to select the members of that role group.
8. Click Save in Discovery Management settings.

Setting Up Security and Compliance for Microsoft 365

To set up Microsoft 365 Security and Compliance:

1. Navigate to Information Governance website in the Microsoft Compliance center.
2. Click +New retention policy to start the setup wizard.
3. Add a Name and a Description for the policy and click Next.
4. Choose the applications to apply the retention policy to. You can either select Apply policy only to content in Exchange email, public folders, Office 365 groups, OneDrive, and SharePoint documents.
5. Once you choose the locations where the retention policy applies, click Next.

6. Set the retention period of the messages along with other options. Configure the settings so that they meet your compliance requirements and click Next. Review the settings that you have chosen. If everything is correct, click Submit.

“ ”

Note: It would take up to 1 day to apply the retention policy to the locations you chose.

“ ”

Microsoft Entra ID App Creation

To authenticate via OAuth during the collector configuration, you need to create a Microsoft Entra ID Application.

To create an app:

1. Create an O365 account and open [Azure Portal](#) using the same credentials as for O365 (Global Admin).
2. Click Microsoft Entra ID at the top of the page and select App Registration from the left-side navigation pane.
3. Click the +New registration button.
4. Enter a Name for the application and click Register.
5. Find and make a note your Application (client) ID and Directory (tenant) ID as this is needed for configuring the collector in Arctera Insight Capture.

Microsoft Entra ID Permissions

For permissions:

1. In the navigation pane to the left, click API permissions.
2. Click Microsoft Graph, and in the opened pane select Application permissions.
3. Add the following permissions:
 - GroupMember.Read.All
 - User.Read.All
4. Grant all the above-mentioned permissions.

Source Configuration

To configure the EWS collector:

1. Specify the URL for the EWS collector.
2. Select the required **Exchange version** from the drop-down list.
3. Choose if the import should be done by last modification date (DateTimeModified) or by creation date (OriginalDateTime). The cut-off date options change accordingly.
4. Fill in the Mailbox Folder from where the data should be imported. If you have more than one Mailbox Folder, separate each name with a semicolon.
5. To process data within all the folders, check All folders.
6. To process data within the subfolders of the specified mailboxes, check Include subfolders.
7. To search for the mentioned mailbox folders in the recovery route folders, check **Load recoverable items** if the Exchange Version is not Exchange2007 Sp1.
8. Enable Personal archive to process only the archived information.

EWS CONFIGURATION

URL

Exchange version ▼

Import based on ▼

Mailbox folders **separated by ':'**

All folders

Include subfolders

Load recoverable items

Personal archive

9. Provide Application ID and Tenant ID.
10. Select the X.509 Certificate file.
11. Enter the X.509 Certificate password. The Certificate thumbprint field will be auto populated in case the collector was previously configured by uploading a certificate.

CREDENTIALS

AUTHENTICATION TYPE

OAuth

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

Tenant ID

Application ID

X.509 Certificate file

X.509 Certificate password

« »

Note: For step-by-step instructions on how to get Application ID and Tenant ID, see Microsoft Entra ID App Creation.

« »


12. For Advanced Configuration Options, Do Not Download Data Modified/Created Before and Do Not Download Data Modified/Created After, allow cutting off data outside the set date range. If the before date is set to 08/17/2021 and the after date is set to 08/25/2021, only the data between these two dates will be downloaded. Data outside that time frame will be ignored. Note that both options can be used independently as well.

ADVANCED CONFIGURATION OPTIONS

Do not download data modified before:

Do not download data modified after:

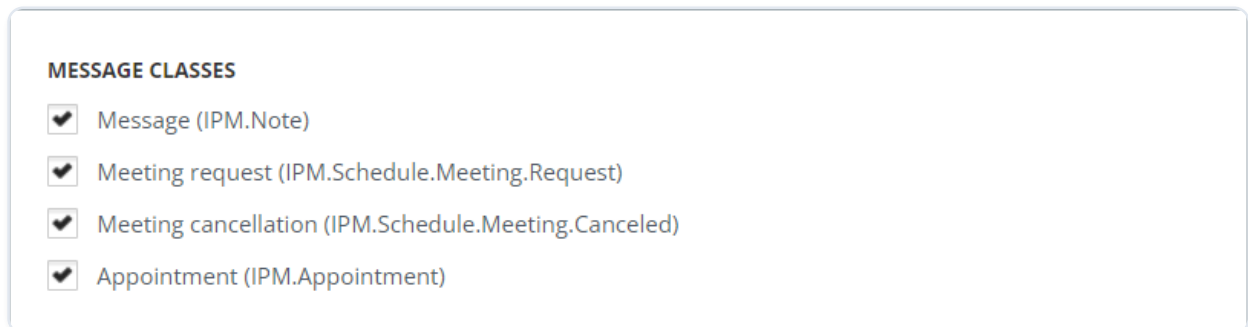
Define mailboxes list

 Please define mailboxes list on next step to tell us whose data you want Arctera Insight Capture to gather.

13. Select the Message Class you would like Arctera Insight Capture to import and then click Save.

A Message Class is an internal identifier that Microsoft Outlook and Microsoft Exchange utilize to locate and activate forms. There are the following Message Class types that can be imported from Exchange:

- Message (IPM.Note)
- Meeting Request (IPM.Schedule.Meeting.Request)
- Meeting Cancellation (IPM.Schedule.Meeting.Canceled)
- Appointment (IPM.Appointment)



MESSAGE CLASSES

- Message (IPM.Note)
- Meeting request (IPM.Schedule.Meeting.Request)
- Meeting cancellation (IPM.Schedule.Meeting.Canceled)
- Appointment (IPM.Appointment)

To include messages irrespective of their Message Class, select all of them.

History Tracking

Based on the provided information, there is a chance to monitor a certain time frame but get a message with a timestamp that is out of the specified frame. This case is applicable when import is based on DateTimeModified.

Next Steps

After setting up the collector, follow the links below to continue with the configuration of:

- [Monitored Users](#)
- [Filters](#)
- [Targets](#)
- [Importer Settings](#)

Exchange Graph API

Microsoft Exchange is a business-class email app which gives you a focused inbox that prioritizes important messages and adapts to your work style, so you can get more done - faster. Arctera Insight Capture retrieves data from Exchange servers via Graph API.

Activities Captured

- Messages
- Meeting requests
- Meeting cancellations

Microsoft Entra ID App Creation

To authenticate via OAuth during the collector configuration, you need to create a Microsoft Entra ID Application.

To create an app:

1. Create an O365 account and open [Azure Portal](#) using the same credentials as for O365 (Global Admin).
2. Click Microsoft Entra ID at the top of the page and select App Registration from the left-side navigation pane.
3. Click the +New registration button.
4. Enter a Name for the application and click Register.
5. Find and make a note your Application (client) ID and Directory (tenant) ID as this is needed for configuring the collector in Arctera Insight Capture.

Microsoft Entra ID Permissions

For permissions:

1. In the navigation pane to the left, click API permissions.
2. Click Microsoft Graph, and in the opened pane select Application permissions.
3. Add the following permissions:
 - GroupMember.Read.All
 - User.Read.All
4. Grant all the above-mentioned permissions.

Source Configuration

To configure the Exchange Graph API collector:

1. In the new window opened, add Application ID, and Application Secret/Key.

2. Select the X.509 Certificate file and enter the X.509 Certificate password. The Certificate thumbprint field will be auto populated in case the collector was previously configured by uploading a certificate.

“ ”

Note: You can copy the Application ID from the Microsoft Entra ID > App Registrations > \<your app name> section.

“ ”

CONFIGURATION WIZARD ×

SOURCE | **MONITORED USERS** | **TARGETS** | **SETTINGS**

Please provide the following credentials to your company's Exchange Graph API app so that Arctera Insight Capture can be configured to access your monitored users' account data.

If you do not have an app created for Exchange Graph API, please [click](#) for more information.

EXCHANGE GRAPH API APPLICATION CONFIGURATION

Directory ID	<input type="text"/>
Application ID	<input type="text"/>
X.509 Certificate file	SELECT
X.509 Certificate password	<input type="text"/>

NEXT


3. On the next screen, choose whether the import should be done by the last modification date (DateTimeModified) or by the creation date (OriginalDateTime). The cut-off date options change accordingly.
4. Fill in the Mailbox Folder from where the data should be imported. If you have more than one Mailbox Folders, separate each name with a semicolon (";").
5. Check All folders to process data within all the folders.
6. To process data within the subfolders of the specified mailboxes, check Include subfolders.
7. To search for the mentioned mailbox folders in the recovery route folders, check Load recoverable items.
8. For Advanced Configuration Options, Do Not Download Data Modified/Created Before and Do Not Download Data Modified/Created After, allow cutting off data outside the set date range. If the before date is set to 08/17/2024 and the after date is set to 08/25/2024, only the data between these two dates will be downloaded. Data outside that range will be ignored. Note that both options can be used independently as well.
9. Select the Captured Activity type you would like to import and then click Save. There are the following activities that can be imported:
 - Message
 - Meeting request
 - Meeting Cancellation




Note: To include messages irrespective of their type, select all of them.



EXCHANGE GRAPH API CONFIGURATION

Import based on 

 *Incautious changes to the history tracking mechanism may cause data loss.*


Mailbox folders **separated by ':'**


All folders

Include subfolders

Load recoverable items

ADVANCED CONFIGURATION OPTIONS

Do not download data modified before: 

Do not download data modified after: 

CAPTURED ACTIVITIES

Message

Meeting request

Meeting cancellation

BACK **NEXT**

Next Steps

After setting up the collector, follow the links below to continue with the configuration of:

- [Monitored Users](#)
- [Filters](#)
- [Targets](#)
- [Importer Settings](#)

FX Connect

FX Connect is a market-leading FX execution venue that helps firms efficiently manage multiple portfolios, connect with brokers, and streamline global operations. It provides users with tools to manage pre- and post-trade workflows electronically, while also offering tools designed to help clients carry out their compliance obligations.

“ ”

Note: Message participants by default are imported in FX Connect User ID format. If you want to map them to the users' email addresses, each email address and corresponding FX Connect User ID should be added in User Mappings section of collector set up.

“ ”

The collector automatically merges messages with the same session ID into one output message.

Activities Captured

- Messages

Captured messages can contain:

- Session ID
- Trade participants
- Message body
- Activity datetime

Source Configuration

FX Connect Configuration

To configure the source:

1. Fill out the following fields:
 - Company name - the company name provided to FX Connect
 - Username - the username provided to FX Connect
 - Password - the user's password

- Users URL - the user link
- Chats URL - the chat link
- From - a dummy email address is being added in case the email of the event is missing

2. Provide X.509 Certificate Thumbprint.

FX CONNECT CONFIGURATION

Company name
Username
Password
Users URL
Chats URL
From ⓘ
X.509 Certificate file
X.509 Certificate password

Threading and Formatting

To configure the section:

1. Select Source time zone. The messages in the source file are of the set time zone, the dates in the messages are processed to the UTC time zone. By default, Insight Capture sets the Source Time Zone as UTC.
2. Enable the Merge messages by thread option to combine all messages from a session into a single message.

THREADING AND FORMATTING

Source time zone
 ▼
 Merge messages by thread

Message Body

There are the following output message body options:

- Plain - this mode displays the message as a simple text.
- Grid mode - this mode allows you to see the information in the following columns:
 - Message creator
 - Message timestamp
 - Message

MESSAGE BODY

Plain Mode

Grid Mode | [Select Style](#)

It is possible to change the color scheme of the grid mode by clicking the Select Style link.

SELECT GRID MODE STYLE

Title:

Title background:

Content:

Content background:

Lines:

—	—
— —	—
— —	—
— —	—

Next Steps

After setting up the collector, follow the links below to continue with the configuration of:

- [Monitored Users \(N/A\)](#)
- [Filters](#)
- [Targets](#)
- [Importer Settings](#)

Google Drive

G Suite's Business and Enterprise editions provide flexible storage options so there will always be enough space for the files. With centralized administration, data loss prevention, and Vault for Drive, users and file-sharing can be easily managed to help meet data compliance needs.

In enterprise applications a user's data might need to be accessed without any manual authorization on their part. In G Suite domains, the domain administrator can grant third-party applications with domain-wide access to its users' data - this is referred as domain-wide delegation of authority. To delegate authority this way, domain administrators can use service accounts with OAuth 2.0.

Activities Captured

- Shared files
- Conversations and comments around shared documents

Service Account Creation

First a service account and its credentials need to be created. During this procedure information that will be used later for the G Suite domain-wide delegation of authority and in the code to authorize with the service account needs to be gathered. The following items required later are service account's:

- Client ID
- Private key file
- Email address.

To create a Service Account:

1. Open the Service accounts page: <https://console.developers.google.com/iam-admin/serviceaccounts>. If prompted, select a project.
2. Click Create service account.
3. In the Create service account window, type a name for the service account.

“ ”

Note: The next two steps are optional.

“ ”

4. Once the service account is created, click it to open its settings. Open the Show Domain-wide Delegation menu, check Enable Google Workspace Domain-Wide Delegation and click Save.
5. In the same window, copy the Email and the Unique ID of the service account.
6. Go to KEYS and click ADD KEY, then select Create new key, to create a private key for the service account.
7. Select the key type JSON and click Create.
8. Your new public/private key pair is generated and downloaded to your machine; it serves as the only copy of this key. Keep it in a secure location.

Domain-Wide Authority Delegation to the Service Account

The created service account needs to be granted access to the G Suite domain's user data that should be accessed.

The following must be performed by an administrator of the G Suite domain:

1. Go to your G Suite domain's Admin console <https://admin.google.com/>, click Security > API controls.
2. Scroll down to Domain wide delegation section and click Manage Domain Wide Delegation.
3. Click Add New.
4. Open the key file that you saved in the above section, copy the value of client_id, then paste it in the Client ID field. Enter the following scopes that your application should be granted access to in OAuth scopes fields and click Authorize:

- `https://www.googleapis.com/auth/admin.directory.user.readonly`

- `https://www.googleapis.com/auth/drive.readonly`

Your service account now has domain-wide access to the Google Admin SDK Directory API for all the users of your domain. Now you can use Admin SDK Directory service object on behalf of your G Suite domain's users.

“ ”

Note: Only users with access to the Admin APIs can access the Admin SDK Directory API, therefore your service account needs to impersonate one of those users to access the Admin SDK Directory API. Additionally, the user must have logged in at least once and accepted the G Suite Terms of Service.

“ ”

Creating Administrative Role for the User Manager Service Account

To create the account:

1. Go to <https://admin.google.com> and click Account > Admin roles.
2. Click CREATE A NEW ROLE.
3. Name the new role and click CONTINUE.
4. Expand Users, select Read and click CONTINUE.
5. Review the privileges and click CREATE ROLE.
6. To assign the role to a user, go to <https://admin.google.com> and click Users, then click the user that you want to assign the role to.
7. Select Admin roles and privileges.
8. Click the Edit button, assign a role, and click Save.
9. Go to <https://console.developers.google.com/> and click ENABLE APIS AND SERVICES. API Library will be open.
10. Search and enable Admin SDK and Google Drive APIs.

Source Configuration

To authenticate the collector:

1. Upload the JSON of the public key saved to your device.

2. Enter the email address of the user created in the previous section.

AUTHENTICATION

Credentials JSON file *

User manager service account *

« »

Note: The Download button is activated when there is a JSON file uploaded.

« »

Timestamp Formatting

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 Date Time Format drop-down list.

TIME STAMP FORMATTING

Primary time zone

 Secondary time zone

Date time format

Advanced Configuration Options

To configure advanced options:

1. Specify the Subject Prefix in the subject line of imported emails. This is useful for organizing imported data, i.e., when multiple sources share a common target.

“ ”



Note: Not applicable to the EV Folder target.

“ ”

2. Specify Do not download data modified before and Do not download data modified after to allow cutting off data outside the set date range. If the before date is set to 08/17/2023 and the after date is set to 08/25/2023, only the data between these two dates will be downloaded. Data outside that range will be ignored. Note that both options can be used independently as well.

ADVANCED CONFIGURATION OPTIONS

Subject prefix

 Do not download data modified before:
 
 Do not download data modified after:
 

Next Steps

After setting up the collector, follow the links below to continue with the configuration of:

- [Monitored Users](#)
- [Filters](#)
- [Targets](#)
- [Importer Settings](#)

IceChat

IceChat messaging system offers collaboration with other market participants. It offers diverse setup options that can be tailored to support user's compliance requirements. With IceChat users can react to trade opportunities in real-time with features including quote and trade recognition logic, blast messages and a marketplace directory connecting over 80,000 market participants.

Activities Captured

- Room ID
- Start time
- Message content
- Participants
- Participants entered
- Message date

Source Configuration

For information on how to configure the following sections of the Source tab, see:

- [File Source Configuration](#)
- [PGP Configurations](#)
- [Quarantine Location](#)
- [Miscellaneous Settings](#)

When Bloomberg Vault Format is enabled, the imported messages are displayed in Bloomberg Vault format.

Bloomberg vault format

Next Steps

After setting up the collector, follow the links below to continue with the configuration of:

- [Monitored Users \(N/A\)](#)
- [Filters](#)
- [Targets](#)

- [Importer Settings](#)

iMessage

iMessage is a messaging service developed by Apple Inc. It allows users to send text messages, photos, videos, documents, and more to other Apple devices over the internet.

The Arctera Insight Capture iMessage collector enables organizations to seamlessly integrate iMessage data into their communication management systems, ensuring comprehensive data collection and compliance.

Following the successful onboarding of your devices on [Sausalito Labs](#), please proceed with configuring your importer.

Activities Captured

- Text messages (iMessage, SMS)
- Edits



Note: Edited messages are captured as new messages prefixed with "Edited to".



- Replies
- Undo sent messages
- Deleted messages



Note: Deletes are not captured as separate events.



- Documents (MS Word, MS Excel, PDF, PPT)
- Images

- Videos
- Audio messages (recordings, voice notes)



Note: Audio messages with user action "Keep" are captured.



- Emojis/Stickers/GIFs



Note: Emojis, stickers, and GIFs are captured as separate messages.



- Links
- Apps from Store
- Pinned locations

Source Configuration

For information on how to configure the following sections of the Source tab, see:

- [File Source Configuration](#)
- [PGP Configurations](#)
- [Quarantine Location](#)
- [Miscellaneous Settings](#)

Advanced Configuration Options

If Include original data as attachment is enabled, the XML file will be attached to the output message.

ADVANCED CONFIGURATION OPTIONS

Include original data as attachment

Next Steps

After setting up the collector, follow the links below to continue with the configuration of:

- [Monitored Users \(N/A\)](#)
- [Filters](#)
- [Targets](#)
- [Importer Settings](#)

JSON

JSON collector allows our customers to rapidly transform JSON files using JSON template files to a predefined format. Once JSON is transformed, Insight Capture processes the JSON file by generating the required mapping fields and creating the configured output format (EML, JSON, etc.). The mapping varies from source to source. Contact [Arctera Support](#) to get the template corresponding to the source and the signature file you are going to use it for.

Activities Captured

- Messages

Captured messages can contain:

- Message subject
- Message headers
- Participants: From, To, CC, and BCC

Activity datetime

- Message body
- Attachments

Source Configuration

For information on how to configure the following sections of the Source tab, see:

- [File Source Configuration](#)
- [Quarantine Location](#)
- [Miscellaneous Settings](#)
- [PGP Configurations](#)

JSON Collector Options

Upload the JSON template provided separately for each source which is used to rapidly transform .JSON files to a predefined format.

To configure the section:

1. Upload the JSON template.
2. Upload the Signature file.

“ ”

Note: Templates must be reviewed and cryptographically signed by Arctera.

“ ”

3. Enable Include original data as attachment in case you want to include original data as an attachment in the output message.

JSON COLLECTOR OPTIONS

Choose JSON template file *	UPLOAD
Download JSON template file	DOWNLOAD
Choose Signature file *	UPLOAD
Download Signature file	DOWNLOAD

Include original data as attachment

Next Steps

After setting up the collector, follow the links below to continue with the configuration of:

- [Monitored Users \(N/A\)](#)
- [Filters](#)
- [Targets](#)
- [Importer Settings](#)

LSEG (Refinitiv)

LSEG (Refinitiv) brings a user the latest news from around the world, covering breaking news in markets, the business, politics, entertainment, technology, video. LSEG (Refinitiv) collector processes data from Eikon Messenger and SI Dealing.

Eikon Messenger is captured and delivered to clients either via a daily XML posted to FTP (External Feed) or hosted archiving (Global Relay). The Eikon Messenger instant messaging network is based on an individual's user ID + firm name and is captured/recognized as such.

Contact our support at [Arctera Support](#) for more details on the mapping corresponding to the source, you are going to use for LSEG(Refinitiv) collector.

Activities Captured

- Person to person messages
- Group chats

- Attachments
- Disclaimers

“ ”

Note: To process current schema files, the file filter should be configured with the following extensions: messages.zip | attachments.zip | *.csv. **Note:** Quarantine sources column on the Dashboard shows the number of the files moved to the quarantine folder while processing source files with the below listed configured formats. All other files have initially been considered unwanted files and have been moved to the quarantine folder.

“ ”

Source Configuration

For information on how to configure the following sections of the Source tab, see:

- [File Source Configuration](#)
- [PGP Configurations](#)
- [Quarantine Location](#)
- [Attachment Validation](#)
- [Miscellaneous Settings](#)

LSEG Options

The option Split by Day merges the messages from the same day into one email message. The time zone by which the messages are split can be selected from the drop-down menu. This option can be selected only if Merge Messages by Thread is selected.

LSEG OPTIONS

Merge messages by thread

Split messages by day

Message Body

In the LSEG (Refinitiv) collector, you can choose between three IB message body options, which specify how the imported message will be displayed in the target.

MESSAGE BODY

- Plain Mode
- Grid Mode | [Select Style](#)
- Light Grid Mode

- When you select the Plain Mode option, you will see the interactions below each other.
- When you select the Light Grid Mode, the data is two-toned, easy to be viewed with limited metadata.

If you enable the Grid Mode option, you will see the information in the five following columns:

- UTC Time Stamp, which includes the date of the sent message
- Content
- Event Type, what kind of an event the activity is (joining the chat, sending a message, etc.)
- Message ID
- Attachment.

“ ”

Note: You can also change the color scheme of the grid mode by clicking the [Select Style](#) link.

“ ”

Next Steps

After setting up the collector, follow the links below to continue with the configuration of:

- [Monitored Users \(N/A\)](#)
- [Filters](#)
- [Targets](#)
- [Importer Settings](#)

Microsoft Teams

Microsoft Teams is a chat-based workspace in Office 365 that integrates with the apps and services teams use to get work done together. It provides the enterprise security and compliance features you expect from Office365, including broad support for compliance standards, and eDiscovery and legal hold for channels, chats, and files.

Activities Captured

- Chat messages
 - Create
 - Edit



Note: If the Capture retained messages (edits) checkbox is selected, all versions of edited messages will be captured.



- Delete
- Channel messages



Note: The team owner should be included in the monitored users list to capture data from shared channels.



- Create
- Edit



Note: If the Capture retained messages (edits) checkbox is selected, all versions of edited messages will be captured. **Note:** Only the latest version of the message is captured for Private Channels due to an API limitation.

“ ”

- Delete

“ ”

Note: The team owner should be included in the monitored users list to capture data from shared channels.

“ ”

Captured messages can contain:

- Chat/Channel info
- Attachments

“ ”

Note: Only the latest version of a replaced attachment in a message is captured due to an API limitation. This limitation also applies to hosted content. **Note:** It is recommended to run/capture the required data before deleting teams and/or channels.

“ ”

- Loop components
- Video clips
- Voice messages
- Reactions

“ ”

Note: Reactions of already captured messages are not captured.

“ ”

- Emojis
- Praises
- Approvals
- Mentions
- System-generated events (members added/removed/joined/left)

“ ”

Warning: The deduplication feature is available for Microsoft Teams chat messages. It is a process that eliminates duplicated copies of data and significantly decreases storage capacity requirements. To use the feature, enable the Use Graph's chat deduplication (cost reduction) checkbox from the Advanced Configuration Options on the Source tab. Note that due to the Graph API limitations, when this feature is enabled, the chat messages of guests and deleted users are not captured. To use this feature all users in the tenant should be monitored and have the E5 licenses. **Note:** In case of having an error with a '404 not found' message for a user when processing messages from Microsoft Teams, the collector will skip that user, and a warning will be logged for later troubleshooting.

“ ”

Notes

Due to the API issues, we have the following limitations:

- Hosted content in one-on-one chats from external users is not captured.
- Hosted contents of deleted teams are not captured.
- Deleted messages are available for capture only 21 days from the time of deletion.
- Hosted contents (including voice messages) of deleted messages are not captured.

Microsoft Entra ID App Creation

To authenticate via OAuth during the collector configuration, you need to create a Microsoft Entra ID Application.

To create an app:

1. Create an O365 account and open [Azure Portal](#) using the same credentials as for O365 (Global Admin).
2. Click Microsoft Entra ID at the top of the page and select App Registration from the left-side navigation pane.
3. Click the +New registration button.
4. Enter a Name for the application and click Register.
5. Find and make a note your Application (client) ID and Directory (tenant) ID as this is needed for configuring the collector in Arctera Insight Capture.

Microsoft Entra ID Permissions

For permissions:

1. In the navigation pane to the left, click API permissions.
2. Click Microsoft Graph, and in the opened pane select Application permissions.
3. Add the following permissions:
 - GroupMember.Read.All
 - User.Read.All
4. Grant all the above-mentioned permissions.

License Info

Creating a subscription in Microsoft Graph requires one of the following licenses:

- Microsoft 365 E5/A5/G5
- Microsoft 365 E5/A5/G5 Compliance
- Microsoft 365 E5/A5/G5/F5 Security
- Microsoft 365 E5/A5/G5 Information Protection and Governance

For pricing and licensing different subscriptions are required:

- In evaluation mode, seeded capacity is shared across all APIs
- Model A is for E5 customers

In case of detecting a user with an improper licensing or other payment issues, the Microsoft Teams API call fails to fetch the data. Hence, conversations will be captured when at least one of the participants has the proper Microsoft 365 licensing and has no payment issues. For additional information about Teams API Pricing and licensing models, see [Licensing and payment requirements - Microsoft Graph | Microsoft Docs](#).

Enabling Billing for Microsoft Teams APIs in Microsoft Graph

Existing applications that used these metered APIs must now set up an active Azure billing subscription by June 30th, 2023, to avoid service disruptions. All other applications, including new applications since March 1st, 2023, are already subject to these requirements.

Microsoft has deprecated support for Teams GCC/GCC High and it is no longer supported.

“ ”

Note: Customers using GCC or GCC High tenants for Microsoft Teams data collection should plan migration to a supported environment.

“ ”

Applications without an active Azure subscription will get error "HTTP 402 Payment required" when trying to access the metered APIs using model=A. Applications using Evaluation Mode will also get error "HTTP 402 Payment required" when the seeded capacity limit is exceeded.

To avoid service disruptions to your application(s), take the following actions if you have not done so yet:

1. [Set up an Azure billing subscription](#) for each application.
2. [Set up a payment model](#) (model=A) for each API request of a metered API.
3. If your app is using model=A, ensure that your users [have the proper E5 licenses and that DLP is enabled](#).

“ ”

Note: Please note that even if you have previously provided a subscription ID in the Protected API form, for the subscription to be properly configured, you still need to follow the instructions above to finish the setup.

“ ”

Source Configuration

To configure the source:

1. Add Directory (tenant) Id and Application Id.
2. Select the X.509 Certificate file.
3. Enter the X.509 Certificate password. The Certificate thumbprint field will be auto populated in case the collector was previously configured by uploading a certificate.

CONFIGURATION WIZARD

SOURCE | MONITORED USERS | FILTERS | TARGETS | SETTINGS

Please provide the following credentials to your company's Microsoft Teams via Export API app so that Arctera Insight Capture can be configured to access your monitored users' account data.

If you do not have an app created for Microsoft Teams via Export API, please [click](#) for more information.

MICROSOFT TEAMS VIA EXPORT API APPLICATION CONFIGURATION

Directory ID	<input type="text"/>
Application ID	<input type="text"/>
X.509 Certificate file	SELECT
X.509 Certificate password	<input type="text"/>

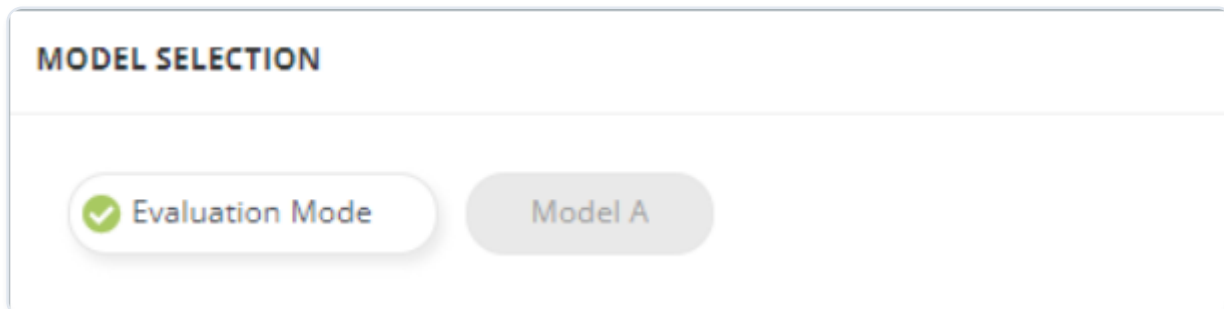
BACK | **NEXT**

Model Selection

Here the user can make a Model Selection which allows selecting licensing and payment options for Microsoft Teams APIs:

- Evaluation mode \- enables access to APIs with limited usage per requesting an application for evaluation purposes.

A \- is restricted to applications performing a security or compliance function and requires a supported license.



Conversation Areas to Capture

Specify the activities to be captured by the collector.

1. Enable All areas to capture data from chats and channels.
2. Enable Certain areas in case either Chats or Channels data needs to be collected.

“ ”

Note: The shared channels' membership type is printed in the output message as "UnknownFutureValue" due to API limitation.

“ ”

CONVERSATION AREAS TO CAPTURE

- All areas
- Certain areas
- Chats
- Channels

Threading and Formatting

“ ”

Note: This section is applicable to the EV Folder target partially.

“ ”

For Threading and Formatting:

- When the Process incomplete days option is enabled, the messages of the days that have not yet ended will be imported in a separate email as well.

Select the Message time zone by which the messages the drop-down menu.

THREADING AND FORMATTING

- No threading
- Per conversation
- Per room
- Process incomplete days

Message time zone

(UTC-08:00) Pacific Time (US & Canada) (PST)



“ ”

Note: When font-family Segoe UI is present in the output message (HTML tags), and Heading 1,2,3, etc., Bold, and Italic formatting styles are applied, the Segoe UI font is not respected by Outlook. However, it is respected in HTML online editor. Also, when Monospaced formatting style is applied, the HTML editor does not respect the given font-family, and so does the Outlook.

“ ”

Timestamp Formatting

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 Date Time Format drop-down list.

TIME STAMP FORMATTING

Primary time zone

(UTC-08:00) Pacific Time (US & Canada) (PST)
▼

Secondary time zone

▼

Date time format

March 29 at 09:31 PM
▼

Advanced Configuration Options

There are following advanced options:

- The Subject Prefix feature will add a prefix before the message subject to facilitate the search in the target.

“ ”

Note: Not applicable to the EV Folder target.

“ ”

- 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 08/17/2023 and the after date is set to 08/25/2023, only the data between these two dates will be downloaded. Data outside that time frame will be ignored. Note that both options can be used independently as well.

“ ”

Note: Due to the changes in the history tracking mechanism, it is required to set the date value for 'Do not download data modified after' to the previous day of the upgrade and run the collector on the new version only once. For daily import processes, it is required to clone the collector after the upgrade and on the cloned collector, set the date value for 'Do not download data modified before' to the day of the upgrade. Ignoring this recommendation can possibly cause duplicates during the first processing after the upgrade.

“ ”

- Capture retained messages (edits): When enabled, collects all versions of edited messages.

“ ”

Note: Before enabling this feature, review your retention policies and refer to Microsoft documentation to ensure it is supported in your environment. Enabling this feature may result in additional Microsoft Graph API usage costs.


“ ”


- Use Graph chat deduplication (cost reduction): When enabled, captures only sent messages from monitored users.
- The Include detailed user information in the body of the message feature searches Entra ID for user principal name and then adds user display name and mail address from the Entra ID Directory.

Include mentioned channel/team members information allows getting the information of the mentioned members in channels/teams by enabling/disabling the corresponding checkbox.

ADVANCED CONFIGURATION OPTIONS

Subject prefix

Do not download data modified before: 

Do not download data modified after: 

Capture retained messages (edits)

Use Graph's chat deduplication (cost reduction)

Include detailed user information in the body of the message

Include mentioned channel/team members information

Attachments Configuration

To configure the attachments:

1. Enable Include original data as attachment to include/exclude original data as attachment.
2. Enable Ignore Attachments to exclude all the attachments from the message. Each message will contain only information and the link of the excluded attachment. This will enhance the collector performance.
3. For Captured Modern Attachments, select:
 - Latest version \- to capture the latest saved version of shared document available at collector run time with the message.
 - Shared version \- to capture the saved version of the document at the time of sharing in Microsoft Teams with the message.

“ ”

Note: To respect the fidelity of the shared document timestamp, it is recommended to disable the Edit feature in Microsoft Teams.

“ ”

- 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 Custom Message field, a text for those excluded files can be specified. E.g., "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.

ATTACHMENTS CONFIGURATION

Include original data as attachment

Ignore attachments

CAPTURED MODERN ATTACHMENT

Latest version

Shared version

Do not download files greater than megabyte(s).

Custom message

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.

File types

Custom message

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.

Splitting Messages

This option allows splitting large files. In the field 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.

SPLITTING MESSAGES Split messages (MB) Max size for each part of splitted message

Split size must be an integer

Next Steps

After setting up the collector, follow the links below to continue with the configuration of:

- [Monitored Users](#)
- [Filters](#)
- [Targets](#)
- [Importer Settings](#)

Microsoft Teams for Audio and Video

Nuclei is a third-party service that specializes in call recording and metadata management. It enables seamless capture, storage, and delivery of call recordings in formats compatible with enterprise systems. As part of its collaboration with Arctera, it places recordings and JSON metadata into locations like SFTP, Azure Blob, or Amazon S3.

The Arctera Insight Capture Microsoft Teams for Audio and Video collector facilitates the integration of Nuclei data into organizational communication management systems. It ensures efficient acquisition of call recordings and metadata, performs data enrichment, and processes the collected data to make it accessible for compliance, analysis, and archiving.

Activities Captured

- Direct calls
- Group calls
- Meetings
- Calendar meetings

Source Configuration

For information on how to configure the following sections of the Source tab, see:

- [File Source Configuration](#)
- [PGP Configurations](#)
- [Quarantine Location](#)
- [Miscellaneous Settings](#)

Advanced Configuration Options

If Include original data as attachment is enabled, the XML file will be attached to the output message.

ADVANCED CONFIGURATION OPTIONS

[Include original data as attachment](#)

Next Steps

After setting up the collector, follow the links below to continue with the configuration of:

- [Monitored Users \(N/A\)](#)
- [Filters](#)
- [Targets](#)
- [Importer Settings](#)

Microsoft Teams via Webhooks

Webhooks (also called a web callback or HTTP push API) is a way for an app to provide other applications with real-time information. Webhooks delivers data to other applications. This makes Webhooks much more efficient for both the provider and the consumers. Webhooks is a method for an application to provide other applications with real-time information. It delivers data to other applications in real or near real time. Therefore, Webhooks is sometimes referred to as "Reverse API," as it gives the consumer/subscriber what amounts to an API spec, which the consumer must design as an endpoint where the subscribed events are delivered to. When an event is detected by the source system that meets the definition of the subscription, Webhooks makes an HTTP request to the subscriber's endpoint, and can be reasonably said to be using the customer's API. Typically, a POST over Transport Layer Security (TLS), which will then require the customer to take some

action to persist the event on its own systems. Therefore, the Webhooks model of information exchanges requires more engineering work on the subscriber side than that of a traditional "pull API", such as MS Graph API or EWS.

We use this technology to capture real-time data from Microsoft Teams.

Activities Captured

- Chat messages
 - Create
 - Edit
 - Delete
- Channel messages
 - Create
 - Edit
 - Delete

Captured messages can contain:

- Chat/Channel info
- Attachments
- Modern attachments
- Archived attachments in OneDrive/Sharepoint (deleted posts)
- Video clips
- Voice messages
- Reactions
- Praises
- Approvals
- Mentions
- System-generated events (call started/ended, members added/deleted/joined/left)

Note

For users who need to use the Microsoft Teams via Webhooks importer for reactive (targeted) discovery:

- Items are available for reactive discovery in the Webhooks portal according to the retention period set when configuring the subscription in the Globanet Portal.
- The maximum amount of time is 90 days.
- When running a targeted discovery search, please allow an end-date greater than the message date to accommodate for latency in delivery of items to the portal by Microsoft. Even though Webhooks technology is usually instantaneous, Microsoft Support has confirmed that there are sometimes delays in data processing which affects their webhooks delivery. Allowing for a larger period for cut-off, ensures that data is not missed during discovery.

Microsoft Entra ID App Creation

To authenticate via OAuth during the collector configuration, you need to create a Microsoft Entra ID Application.

To create an app:

1. Create an O365 account and open [Azure Portal](#) using the same credentials as for O365 (Global Admin).
2. Click Microsoft Entra ID at the top of the page and select App Registration from the left-side navigation pane.
3. Click the +New registration button.
4. Enter a Name for the application and click Register.
5. Find and make a note your Application (client) ID and Directory (tenant) ID as this is needed for configuring the collector in Arctera Insight Capture.

Microsoft Entra ID Permissions

For permissions:

1. In the navigation pane to the left, click API permissions.
2. Click Microsoft Graph, and in the opened pane select Application permissions.
3. Add the following permissions:
 - GroupMember.Read.All
 - User.Read.All
4. Grant all the above-mentioned permissions.

Managing Encryption Keys

To create a Webhooks Platform subscription, you will need to generate an asymmetric key pair and upload the public key to the Webhooks website during subscription creation.

“ ”

Note: This public key will be sent to Microsoft Graph during subscription creation and the key will be used to encrypt the data before it is sent to cloud infrastructure, i.e., only Private Key holders will be able to decrypt the notifications sent by Microsoft Graph. does not have access to the private key.

“ ”

To manage Encryption keys:

1. Obtain a certificate with a pair of asymmetric keys:
 - You can self-sign the certificate, since Microsoft Graph does not verify the certificate issuer, and uses the public key for only encryption
 - The key must be of type RSA
 - The key size must be between 2048 and 4096 bits
2. Export the certificate in base64-encoded X.509 format and upload it during Globanet Webhooks subscription creation.
3. Export the private key and install it on the server that will be used to capture data gathered by the Webhooks Platform.

License Info

Creating a subscription in Microsoft Graph requires one of the following licenses:

- Microsoft 365 E5/A5/G5
- Microsoft 365 E5/A5/G5 Compliance
- Microsoft 365 E5/A5/G5/F5 Security
- Microsoft 365 E5/A5/G5 Information Protection and Governance

For pricing and licensing different subscriptions are required:

- In evaluation mode, seeded capacity is shared across all APIs
- Model A is for E5 customers

In case of detecting a user with an improper licensing or other payment issues, the Microsoft Teams API call fails to fetch the data. Hence, conversations will be captured when at least one of the participants has the proper Microsoft 365 licensing and has no payment issues. For additional information about Teams API Pricing and licensing models, see [Licensing and payment requirements - Microsoft Graph | Microsoft Docs](#).

Enabling Billing for Microsoft Teams APIs in Microsoft Graph

Existing applications that used these metered APIs must now set up an active Azure billing subscription by June 30th, 2023, to avoid service disruptions. All other applications, including new applications since March 1st, 2023, are already subject to these requirements.

Microsoft has deprecated support for Teams GCC/GCC High and it is no longer supported.

“ ”

Note: Customers using GCC or GCC High tenants for Microsoft Teams data collection should plan migration to a supported environment.

“ ”

Applications without an active Azure subscription will get error "HTTP 402 Payment required" when trying to access the metered APIs using model=A. Applications using Evaluation Mode will also get error "HTTP 402 Payment required" when the seeded capacity limit is exceeded.

To avoid service disruptions to your application(s), take the following actions if you have not done so yet:

1. [Set up an Azure billing subscription](#) for each application.
2. [Set up a payment model](#) (model=A) for each API request of a metered API.
3. If your app is using model=A, ensure that your users [have the proper E5 licenses and that DLP is enabled](#).

“ ”

Note: Please note that even if you have previously provided a subscription ID in the Protected API form, for the subscription to be properly configured, you still need to follow the instructions above to finish the setup.

“ ”

Working in the Globanet Portal

Contact [Arctera Support](#) to get access to Globanet Portal.

Source Configuration

To configure the source:

1. Enter the Client ID and Client Secret (See [Working in the Globanet Portal](#)), in the Application ID and the Secret fields correspondingly and click NEXT.

The screenshot shows a 'CONFIGURATION WIZARD' window with a close button (X) in the top right corner. Below the title bar is a navigation bar with five tabs: 'SOURCE' (selected), 'MONITORED USERS', 'FILTERS', 'TARGETS', and 'SETTINGS'. The main content area contains the following text:

Please provide the following credentials to your company's Microsoft Teams via Webhooks app so that Arctera Insight Capture can be configured to access your monitored users' account data.

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

MICROSOFT TEAMS VIA WEBHOOKS APPLICATION CONFIGURATION

Application ID

Application secret/key

At the bottom right of the wizard is a dark blue button labeled 'NEXT'.

2. Enter the Globanet Subscription ID (See [Working in the Globanet Portal](#)), MS Azure Directory ID, and MS Azure Application ID in the Authentication section.

3. Select the X.509 Certificate file. Enter X.509 Certificate password. The Certificate thumbprint field will be auto populated in case the collector was previously configured by uploading a certificate.

AUTHENTICATION

Globanet subscription ID
MS Azure directory ID
MS Azure application ID
X.509 Certificate file
X.509 Certificate password



Message Decryption Options

Microsoft Graph does not verify the certificate issuer and uses the public key for only encryption.

To receive the notifications decrypted:

1. Click +ADD CERTIFICATE.
2. Select the X.509 Certificate file.
3. Provide the X.509 certificate password. The Certificate thumbprint field will be auto populated in case the collector was previously configured by uploading a certificate.

MESSAGE DECRYPTION OPTIONS

CERTIFICATE  

X.509 Certificate file
X.509 Certificate password

Advanced Configuration Options

There are the following advanced options when configuring the collector:

- The Subject Prefix feature will add a prefix before the message subject to facilitate the search in the target.

“ ”

Note: Not applicable to the EV Folder target.

“ ”


- The Merge message by thread if checked, combines messages by threads rather than sending them one by one.
- Select the Message time zone by which the messages the drop-down menu.
- When Process incomplete days option is enabled, the messages of the days that have not yet ended will be imported in a separate email as well. This option can be selected only if Merge messages by thread is selected.
- 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 08/17/2024 and the after date is set to 08/25/2024, only the data between these two dates will be downloaded. Data outside that time frame will be ignored. Note that both options can be used independently as well.

ADVANCED CONFIGURATION OPTIONS


Subject prefix


Merge messages by thread

Message time zone

(UTC-08:00) Pacific Time (US & Canada) (PST) 

Process incomplete days

Do not download data modified before: 

Do not download data modified after: 

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. E.g., "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.

ATTACHMENTS CONFIGURATION

Do not download files greater than megabyte(s).

Custom message

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.

File types

Custom message

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.

Message Body

This specifies how the imported message will be displayed in the target. The Basic HTML mode organizes the data in a simple way and data displayed in a Light Grid Mode is two-toned, easy to be viewed with limited metadata.

MESSAGE BODY

Basic HTML

Light Grid Mode

Next Steps

After setting up the collector, follow the links below to continue with the configuration of:

- [Monitored Users](#)
- [Filters](#)
- [Targets](#)
- [Importer Settings](#)

NTR-X

NTR-X is a cloud-ready omnichannel compliance recording solution which allows for recording all your regulated employee communications - traditional, unified, mobile - and ensuring compliance with all global regulations.

Activities Captured

- Calls

Captured messages can contain:

- Participants: From, To
- Call start time (as a timestamp)
- Call duration
- Audio attachment files in MP3 format

Source Configuration

For information on how to configure the following sections of the Source tab, see:

- [File Source Configuration](#)
- [PGP Configurations](#)
- [Quarantine Location](#)

Notes

- The source file group should contain an MP3 file and an XML file with the same GUID as a file name.
- When configuring the SFTP source, the Download subdirectory recursively option should be enabled as the expected file group (an MP3 file and an XML file) is nested with NTR-X structure.
- Ensure not to exceed the Windows limitation for file names when processing ZIP files as they may not be processed due to the file name length of the file group.

Advanced Configuration Options

If Include original data as attachment is checked, the XML file will be attached to the output message.

ADVANCED CONFIGURATION OPTIONS

Include original data as attachment

Next Steps

After setting up the collector, follow the links below to continue with the configuration of:

- [Monitored Users \(N/A\)](#)
- [Filters](#)
- [Targets](#)
- [Importer Settings](#)

OneDrive for Business

OneDrive is a file-hosting service operated by Microsoft as part of its suite of online services which allows you to store, share and synchronize work files.

The OneDrive for Business collector features include Monitored Users management, i.e., it is possible to specify which users accounts of Microsoft OneDrive should be captured.

OneDrive metadata is used to create a Arctera Insight Capture email file. The metadata includes document creator (author in the Arctera Insight Capture email file), the file name (subject), Modified date (sent date), item id, name, CreatedBy, CreatedDateTime, LastModifiedBy, LastModifiedDateTime, webUrl, size, parentReference, folderId and any other tags listed in the message body are added to the email file body.

Activities Captured

- Uploaded files
- Renamed files
- Delete event without the file

“ ”

Note: Deleted events are not captured during the first run and immediately after the deletion.

Note: Hard deleted items, i.e., items that have been deleted from Recycle bin as well, are not captured.

“ ”

- New created documents via browser with the file

“ ”

Note: If there are multiple activities performed in the same file, only the most recent one will be recorded. **Note:** Microsoft OneNote files (where users' notes, drawings, screen clippings, and audio commentaries are gathered) are captured.

“ ”

Activities Not Captured

- 'Move to' events with the file
- Download
- Preview
- Preview in the browser
- All folder activities (create, delete, rename, move, or copy)
- Flow activities

Microsoft Entra ID App Creation

To authenticate via OAuth during the collector configuration, you need to create a Microsoft Entra ID Application.

To create an app:

1. Create an O365 account and open [Azure Portal](#) using the same credentials as for O365 (Global Admin).
2. Click Microsoft Entra ID at the top of the page and select App Registration from the left-side navigation pane.
3. Click the +New registration button.

4. Enter a Name for the application and click Register.
5. Find and make a note your Application (client) ID and Directory (tenant) ID as this is needed for configuring the collector in Arctera Insight Capture.

Microsoft Entra ID Permissions

For permissions:

1. In the navigation pane to the left, click API permissions.
2. Click Microsoft Graph, and in the opened pane select Application permissions.
3. Add the following permissions:
 - GroupMember.Read.All
 - User.Read.All
4. Grant all the above-mentioned permissions.

Source Configuration

To configure the source:

1. Add Application ID from the Entra ID Directory > App Registrations > \<your app name\> section.
2. Select the X.509 Certificate file.
3. Enter the X.509 Certificate password. The Certificate thumbprint field will be auto populated in case the collector was previously configured by uploading a certificate.
4. After clicking Next, a pop-up window should appear where you can provide the O365 Global Admin user credentials (note that usually the pop-up is being blocked by the browser, so pay attention to the top right corner of the browser if the popup is not appearing). In the next window, click Accept to grant the permissions.

CONFIGURATION WIZARD
✕

SOURCE

MONITORED USERS

FILTERS

TARGETS

SETTINGS

Please provide the following credentials to your company's OneDrive for Business app so that Arctera Insight Capture can be configured to access your monitored users' account data.

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

ONEDRIVE FOR BUSINESS APPLICATION CONFIGURATION

Directory ID

Application ID

X.509 Certificate file

SELECT

X.509 Certificate password

NEXT

Attachments Configuration

For more information on how to configure attachments, see [Attachments Configuration](#)

When the Ignore Attachments checkbox is checked, all the attachments are being excluded from the message which will enhance the collector performance. Each message will contain only information and the link of the excluded attachment.

Timestamp Formatting

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 Date Time Format drop-down list.

TIME STAMP FORMATTING

Primary time zone
(UTC-08:00) Pacific Time (US & Canada) (PST) ▼

Secondary time zone
▼

Date time format
March 29 at 09:31 PM ▼

Advanced Configuration Options

To configure advanced options:

1. Specify the Subject Prefix in the subject line of imported emails. This is useful for organizing imported data, i.e., when multiple sources share a common target.

“ ”


Note: Not applicable to the EV Folder target.


“ ”

2. Specify Do not download data modified before and Do not download data modified after to allow cutting off data outside the set date range. If the before date is set to 08/17/2023 and the after date is set to 08/25/2023, only the data between these two dates will be downloaded. Data outside that range will be ignored. Note that both options can be used independently as well.

ADVANCED CONFIGURATION OPTIONS

Subject prefix

Do not download data modified before:
 

Do not download data modified after:
 

Next Steps

After setting up the collector, follow the links below to continue with the configuration of:

- [Monitored Users](#)
- [Filters](#)
- [Targets](#)
- [Importer Settings](#)

Pivot

Pivot is an instant messaging platform that allows collaboration with financial market participants over its secure and fast network.

Activities Captured

- Participant entered:
 - Date time
 - Internal flag
 - Corporate email ID
- Message:
 - Date time
 - Messages

- Participant left:
 - Date time
 - Corporate email ID

Source Configuration

For information on how to configure the following sections of the Source tab, see:

- [File Source Configuration](#)
- [PGP Configurations](#)
- [Quarantine Location](#)
- [Miscellaneous Settings](#)

Primary Address to Use

Choose the email address type you would like Arctera Insight Capture to prioritize when processing data from users that have both Pivot email address and Corporate email address.

PRIMARY ADDRESS TO USE

Pivot email address

Corporate email address

Next Steps

After setting up the collector, follow the links below to continue with the configuration of:

- [Monitored Users \(N/A\)](#)
- [Filters](#)
- [Targets](#)
- [Importer Settings](#)

Redtail Speak

Redtail is a CRM system that focuses on financial advisor/client relationships. The Speak feature is an add-on model that allows advisors to communicate with their clients, team members, and the overall company. Through its Speak platform, Redtail can send text messages to communicate with the clients and recognizes the need for compliance.

Arctera Insight Capture collects Redtail Speak messages from the Redtail Speak SMTP server. For setting up an SMTP server, contact [Arctera Support](#).

Activities Captured

- One-on-one chats with team members
- Public/private group conversations

Source Configuration

For information on how to configure the following sections of the Source tab, see:

- [File Source Configuration](#)
- [PGP Configurations](#)
- [Quarantine Location](#)
- [Miscellaneous Settings](#)

Next Steps

After setting up the collector, follow the links below to continue with the configuration of:

- [Monitored Users \(N/A\)](#)
- [Filters](#)
- [Targets](#)
- [Importer Settings](#)

RingCentral

RingCentral Team Messaging is a team collaboration solution that helps organize and centralize team communication. RingCentral provides a compliance API that will be used to download messages and meeting-based content.

Activities Captured

- Chats
- Tasks
- Notes
- Events
- SMS chats

“ ”

Note: The outgoing SMS chats of internal users and incoming SMS chats of external users are captured.

“ ”

- Attachments

“ ”

Note: Attachment downloading is available only for files uploaded from a local computer. For third-party applications, such as Dropbox, Google Drive, Box, the downloadUrl is not returned, and a message is constructed without an attachment.

“ ”

Compliance Exports

Compliance Exports is a special capability specifically built for companies and regulated industries, such as financial services, with compliance requirements for using electronic communication in the workplace. This feature is also a fail-safe way of preserving business communications for legal discovery or internal review.

When you download a compliance export, you will receive a .zip file that contains a number of files and folders that contain all of the data associated with your data export. For more information, see [Team Messaging Compliance Export File Structure](#).

“ ”

Note: Only the content and items that fall within the specified period for the archive are included in the downloaded/compliance export file. Therefore, data outside that time range is not captured.

“ ”

Creating a RingCentral Application

To create the application:

1. Sign in to the [RingCentral Developer Console](#).
2. You will be navigated to the Apps console where all your apps are listed and can be managed. Click Create App at the upper right corner of All applications.

“ ”

Note: If you see the Create App button, but it is disabled, then your account lacks the permission required to create an app. Contact your account administrator to request this permission.

“ ”

3. Select your app type and click Next.
4. In the next opened window, enter App Name and Description.
5. Select No for Do you intend to promote this app in the RingCentral App Gallery? (For internal-use only).
6. In the Auth section, make sure 3-legged OAuth flow authorization code is enabled and select Server-side web app (most common).
7. In the OAuth Redirect URI field, enter the URL of your local environment.

“ ”

Note: The Redirect URI can be found in the Click information of the collector source configuration.

“ ”

8. In the Security section, select Read Accounts and Team Messaging from the App Permissions drop-down list. Click Create.
9. In the opened window, you will find your application details, including Client ID, Client Secret, and RingCentral Server URL. Copy and save them for later using during Source configuration.

Source Configuration

To set up the collector:

- In the Application ID field, enter Client ID copied previously, in Application secret/key, enter the copied Client Secret, enter the API server URL in the RingCentral server URL field, and then click Next.

CONFIGURATION WIZARD
×

SOURCE

MONITORED USERS

FILTERS

TARGETS

SETTINGS

Please provide the following credentials to your company's RingCentral app so that Arctera Insight Capture can be configured to access your monitored users' account data.

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

RINGCENTRAL APPLICATION CONFIGURATION

Application ID

Application secret/key

RingCentral server URL

I have access token

NEXT

Timestamp Formatting

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 Date Time Format drop-down list.

TIME STAMP FORMATTING

Primary time zone
(UTC-08:00) Pacific Time (US & Canada) (PST) ▼

Secondary time zone
▼

Date time format
March 29 at 09:31 PM ▼

Advanced Configuration Options

There are following advanced options:

- The Subject Prefix feature will add a prefix before the message subject to facilitate the search in the target.
- The Merge message by thread if checked combines messages by threads rather than sending them one by one.
- Select the Message time zone from the drop-down menu. When the Process incomplete days option is enabled, the messages of the days that have not yet ended will be imported in a separate email as well. This option can be selected only if Merge messages by thread is selected.
- 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 08/17/2022 and the after date is set to 08/25/2022, only the data between these two dates will be downloaded. Data outside that time frame will be ignored. Note that both options can be used independently as well.


ADVANCED CONFIGURATION OPTIONS


Subject prefix

Merge messages by thread

Message time zone

Process incomplete days

Do not download data modified before: 

Do not download data modified after: 

Attachments Configuration

There are the following configuration options:

- When the Ignore Attachments checkbox is checked, all the attachments are being excluded from the message which will enhance the collector performance. Each message will contain only information and the link of the excluded attachment.
- 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 Custom Message field, a text for those excluded files can be specified. E.g., "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.

“ ”

Note: In case of using file filtering by size and by type, we recommend using custom messages.

“ ”

ATTACHMENTS CONFIGURATION

Ignore attachments

Do not download files greater than megabyte(s).

Custom message

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.

File types

Custom message

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.

Next Steps

After setting up the collector, follow the links below to continue with the configuration of:

- [Monitored Users](#)
- [Filters](#)
- [Targets](#)
- [Importer Settings](#)

ServiceNow

ServiceNow is a customizable service management platform that facilitates requests for support items such as hardware, software requests. The platform has ability for partners to develop solutions and add to the ServiceNow app library.

Activities Captured

- Live messages with comments and attachments created in My Feed
- Live messages with comments and attachments created in Company Feed

- Live messages with comments and attachments created in Group feed (Public/Private)
- Conversations with comments and attachments (one-on-one, group)
- Deletes
- Polls with choices and votes
- Like counts
- Links
- Mentions
- Emojis



Note: When the group is deleted, the messages are not captured.



Activities not Captured

- Record feed
- Tasks with comments
- Incidents with comments
- Requests with comments
- Requested items with comments
- Problem with comments
- Change request
- Change task

Creating a ServiceNow Application

The administrator of your organization must perform the following steps:

1. Log in to ServiceNow instance and navigate to System OAuth > Application Registry.
2. Click the Application Registry and the applications list will open. Click New.
3. Select the Create an OAuth API endpoint for external clients option.
4. Enter a name for the application.

5. Unlock the Redirect_URI field and enter the URL of your local environment and click the Submit button.



Note: The Redirect URI can be found in the Click information of the collector source configuration.



6. After executing the provided steps, on the Application Registry page you will find the application you have just created.

Click your application, and in the opened window, you will find your application details, including Client ID and Client Secret. Copy and save the Client ID and Secret to later provide them to Arctera Insight Capture as part of ServiceNow configuration.

Source Configuration

To set up the collector:

1. Add your ServiceNow Instance URL.
2. Add the App Key copied previously in the Application ID field.
3. In Application Secret/Key, enter copied Secret, and then click NEXT.

CONFIGURATION WIZARD ✕

SOURCE
MONITORED USERS
FILTERS
TARGETS
SETTINGS

Please provide the following credentials to your company's ServiceNow app so that Arctera Insight Capture can be configured to access your monitored users' account data.

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

SERVICENOW APPLICATION CONFIGURATION

ServiceNow instance URL

Application ID

Application secret/key

I have access token

NEXT

Timestamp Formatting

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 Date Time Format drop-down list.

TIME STAMP FORMATTING

Primary time zone

(UTC-08:00) Pacific Time (US & Canada) (PST)
▼

Secondary time zone

▼

Date time format

March 29 at 09:31 PM
▼



Note: If the selected time zone is not matching with your ServiceNow instance default time zone there might be some unwanted consequences.



SERVICENOW API TIMEZONE

System default time zone on ServiceNow instance.

If selected time zone is not matching with your ServiceNow instance default time zone, there might be some unwanted consequences.

(UTC-08:00) Pacific Time (US & Canada) (PST)



Advanced Configuration Options

To configure advanced options:

1. Specify the Subject Prefix in the subject line of imported emails. This is useful for organizing imported data, i.e., when multiple sources share a common target.
2. Specify Do not download data modified before and Do not download data modified after to allow cutting off data outside the set date range. If the before date is set to 08/17/2023 and the after date is set to 08/25/2023, only the data between these two dates will be downloaded. Data outside that range will be ignored. Note that both options can be used independently as well.

ADVANCED CONFIGURATION OPTIONS

Subject prefix

Merge messages by thread

Message time zone

(UTC-08:00) Pacific Time (US & Canada) (PST)



Process incomplete days

Do not download data modified before: 1/18/2025



Do not download data modified after:



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 Custom Message field, a text for those excluded files can be specified. E.g., "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.

ATTACHMENTS CONFIGURATION

Do not download files greater than megabyte(s).

Custom message

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.

File types

Custom message

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.

Message Body

This specifies how the imported message will be displayed in the target. The Basic HTML mode organizes the data in a simple way and data displayed in a Light Grid Mode is two-toned, easy to be viewed with limited metadata.

MESSAGE BODY

- HTML
- Light grid mode

Next Steps

After setting up the collector, follow the links below to continue with the configuration of:

- [Monitored Users](#)
- [Filters](#)
- [Targets](#)
- [Importer Settings](#)

SharePoint

SharePoint is a web-based collaborative platform that integrates with Microsoft Office. Launched in 2001, SharePoint is primarily sold as a document management and storage system, but the product is highly configurable, and the usage varies substantially among organizations.

SharePoint can refer to one or more SharePoint products or technologies, including:

- SharePoint Online
- SharePoint Server
- SharePoint Foundation
- SharePoint Designer 2013
- OneDrive for Business sync

The Arctera Insight Capture SharePoint collector captures data from SharePoint Online.

Activities Captured

- Newsfeed/Document library/ Picture library posts
- Newsfeed /Document library/ Picture library comments
- Custom lists
- Custom lists comments
- Site page comments

“ ”

Note: The SharePoint CSOM API provides two identical versions of the same data with a different version numbering and for the storage and visibility sack, only one version is kept.



Microsoft Entra ID App Creation

To authenticate for the collector configuration, you need to create a Microsoft Entra ID Application.

To create an app:

1. Create an O365 account and open [Azure Portal](#) using the same credentials as for O365 (Global Admin).
2. Click Microsoft Entra ID at the top of the page and select App Registration from the left-side navigation pane.
3. Click the +New registration button.
4. Enter a Name for the application and click Register.
5. Find and make a note your Application (client) ID and Directory(tenant) ID as this is needed for configuring the collector in Arctera Insight Capture.
6. In the navigation pane to the left, go to Certificates & secrets.
7. Click the Upload certificate button.
8. Select a certificate (public key) with one of the following file types: .cer,.pem, .crt, and click Add. For more information on how to create a certificate, see [Creating a Certificate \(Private and Public Keys\)](#).

Microsoft Entra ID Permissions

For permissions:

1. In the navigation pane to the left, click API permissions.
2. Click Microsoft Graph, and in the opened pane select Application permissions.
3. Add the following permissions:
 - Files: Files.Read.All
 - Directory: Directory.Read.
 - All User: User.Read.All
4. Click Add permissions.
5. Get back to API permissions section, click \+ Add a permission and select SharePoint API with Application permissions. These are the permissions you need to grant:

- Sites: Sites.FullControl.All; Sites.Read.All
- User: User.Read.All
- TermStore: TermStore.Read.All

6. Click Add permissions.
7. Grant all the above-mentioned permissions.

Setting Up Security and Compliance for Microsoft 365

To set up Microsoft 365 Security and Compliance:

1. Navigate to Information Governance website in the Microsoft Compliance center.
2. Click +New retention policy to start the setup wizard.
3. Add a Name and a Description for the policy and click Next.
4. Choose the applications to apply the retention policy to. You can either select Apply policy only to content in Exchange email, public folders, Office 365 groups, OneDrive, and SharePoint documents.
5. Once you choose the locations where the retention policy applies, click Next.
6. Set the retention period of the messages along with other options. Configure the settings so that they meet your compliance requirements and click Next. Review the settings that you have chosen. If everything is correct, click Submit.

“ ”

Note: Note that it would take up to 1 day to apply the retention policy to the locations you chose.

“ ”

Source Configuration

To set up the collector:

1. Provide Directory ID.

You can copy the Application ID from the Entra ID > App Registrations > \<your app name\> section.

1. Select the X.509 Certificate file.
2. Enter the X.509 Certificate password. The Certificate thumbprint field will be auto populated in case the collector was previously configured by uploading a certificate.

CONFIGURATION WIZARD

SOURCE | **MONITORED USERS** | **FILTERS** | **TARGETS** | **SETTINGS**

Please provide the following credentials to your company's SharePoint app so that Arctera Insight Capture can be configured to access your monitored users' account data.

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

SHAREPOINT APPLICATION CONFIGURATION

Directory ID	<input type="text"/>
Application ID	<input type="text"/>
X.509 Certificate file	<input type="button" value="SELECT"/>
X.509 Certificate password	<input type="text"/>

SharePoint Activities

For SharePoint activities:

1. Activate Monitor all sites in case all SharePoint sites should be monitored. In this case, file upload and download options will be inactive.
2. Activate Monitor certain sites in case only certain SharePoint sites/sub-sites should be monitored.
3. Upload the CSV file that includes:
 - The site/sub-site URL which can be found by clicking the Copy button from the right-side opened Page Details window.

- TRUE or FALSE options which will specify whether the sub-sites should or should not be monitored accordingly. If not specified, the default value will be FALSE, i.e., sub-sites will not be monitored.

4. In case you need to make changes in the CSV, download the already uploaded file, make the necessary changes, and upload it again.

The following activities can be captured:

- Microfeed
- Site page
- Document library
- Picture library
- Custom list

“ ”

Note: If the file names contain the "#" and "%" symbols, they will not be downloaded.

“ ”

SHAREPOINT ACTIVITIES

Monitor all sites
 Monitor certain sites

File *

Download file

Microfeed
 Site Page
 Document Library
 Picture Library
 Custom List

Ignore inactive files ⓘ

Ignore files with no activity in the last days.

By enabling the Ignore inactive files checkbox and specifying the Ignore files with no activity in the last X days, only the files with their comments modified within the specified days will be captured.

Timestamp Formatting

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 Date Time Format drop-down list.

TIME STAMP FORMATTING

Primary time zone

Secondary time zone

Date time format

Advanced Configuration Options

To configure advanced options:

1. Specify the Subject Prefix in the subject line of imported emails. This is useful for organizing imported data, i.e., when multiple sources share a common target.

“ ”

Note: Not applicable to the EV Folder target.



“ ”

2. Enable Include additional columns to include more columns in the output message.
3. Specify Do not download data modified before and Do not download data modified after to allow cutting off data outside the set date range. If the before date is set to 08/17/2023 and the after date is set to 08/25/2023, only the data between these two dates will be downloaded.

Data outside that range will be ignored. Note that both options can be used independently as well.

ADVANCED CONFIGURATION OPTIONS

Subject prefix

 Include additional columns
 Do not download data modified before: 
 Do not download data modified after: 

Processing Mode

There are the following options:

- The Single message per event captures each event (post, comment, reply) in one message.
- The Single message per comment and its replies/sub-comments captures a message and all replies and comments related to it in one output message.
- The Single message per site captures all messages and their replies and comments in one combined message.

PROCESSING MODE
 Single message per event
 Single message per comment and its replies/sub-comments
 Single message per site

If any event has been changed after a single Arctera Insight Capture run, when it is run the next time, the updated version of the event will be imported. The processing modes apply both to the Newsfeed and to the Site Page comments.

Next Steps

After setting up the collector, follow the links below to continue with the configuration of:

- [Monitored Users](#)
- [Filters](#)

- Targets
- Importer Settings

Slack eDiscovery

The Slack eDiscovery collector allows retrieving data from Slack Enterprise account workspaces, consolidate it into one archive or mail for eDiscovery. Enterprise Grid is a "network" of two or more Slack workspace instances. Each Slack workspace has its team ID, its directory of members, its channels, conversations, and files.

To set up the Slack eDiscovery collector, contact Slack at exports@slack.com and ask to enable Discovery API for your organization before finishing the collector set up.

Activities Captured

- Activities from all workspaces
- Direct messages
- Canvases

“ ”

Note: The canvas download activities of the admin account are not captured.

“ ”

- Canvas activities

“ ”

Note: Deleted canvases and canvas items are not captured.

“ ”

Canvas comments

Canvas content

“ ”

Note: The latest version in the canvas content is captured in case of multiple edits. **Note:** Reauthentication is required for to capture canvases.

“ ”

- Multi-participant direct messages
- Channel conversations/messages
- Attachments (the attachment itself is included in the generated message as an attachment)
- Attachments shared using third-party integrations such as OneDrive (only the link is included in the body of the generated message)
- Emojis (as texts)
- GIFs
- Deletes (including the deleted message and the event itself)
- Edits (including the message before and after it is edited)
- Guest conversations
- Message reactions
- Shared channel events (channels shared with external organizations)
- Channel join event
- Set channel purpose event
- Files delete event
- Emails sent from supported email services

“ ”

Note: Capturing the edit and delete activities depend on the retention policy of your Slack Enterprise account. You can set message retention to "Keep all messages and keep edit and deletion logs" from https://my.slack.com/admin/settings#data_retention. This will work for public channels. If you need to capture all edit and deletion logs for private channels and direct messages as well, please check the Retention Policy of your Slack Enterprise account.

“ ”

Source Configuration

To set up the Slack eDiscovery collector:

1. Log into your Slack Enterprise workspace using the organization URL. You should stay logged into your account when adding a Arctera Insight Capture collector.
2. Click Manage Organization on the upper right corner.
3. Enter the necessary workspace.
4. Confirm that the account used for configuring the collector has the necessary permissions, i.e., is either an Org. Owner or a Primary Org. Owner.

“ ”

Note: Org. Owner controls the highest-level security and administrative settings, but only the Primary Org. Owner (usually the person who created the workspace) can delete it.

“ ”

5. Leave the window open.
6. Go to Arctera Insight Capture and add click Add Importer.
7. Add a Name to the importer and a Description and select the collector from the collectors list.
8. After receiving a confirmation from us, contact exports@slack.com and ask to enable Discovery API for your organization.
9. Add your Slack eDiscovery Organization URL in the Organization Domain field. If the organization domain has enterprise subdomain in it, it should be omitted from the field. For example, the domain `Arctera.enterprise.slack.com` should be filled in as `Arctera.slack.com`.
10. Click NEXT, to initialize the connection after the Discovery API is enabled. Discovery API allows using approved third-party apps (in this case Arctera Insight Capture) to export, archive, or meet other security and compliance obligations for any organization content.

CONFIGURATION WIZARD ×

- SOURCE**
- MONITORED USERS
- FILTERS
- TARGETS
- SETTINGS

Please provide the following credentials to your company's Slack eDiscovery app so that Arctera Insight Capture can be configured to access your monitored users' account data.

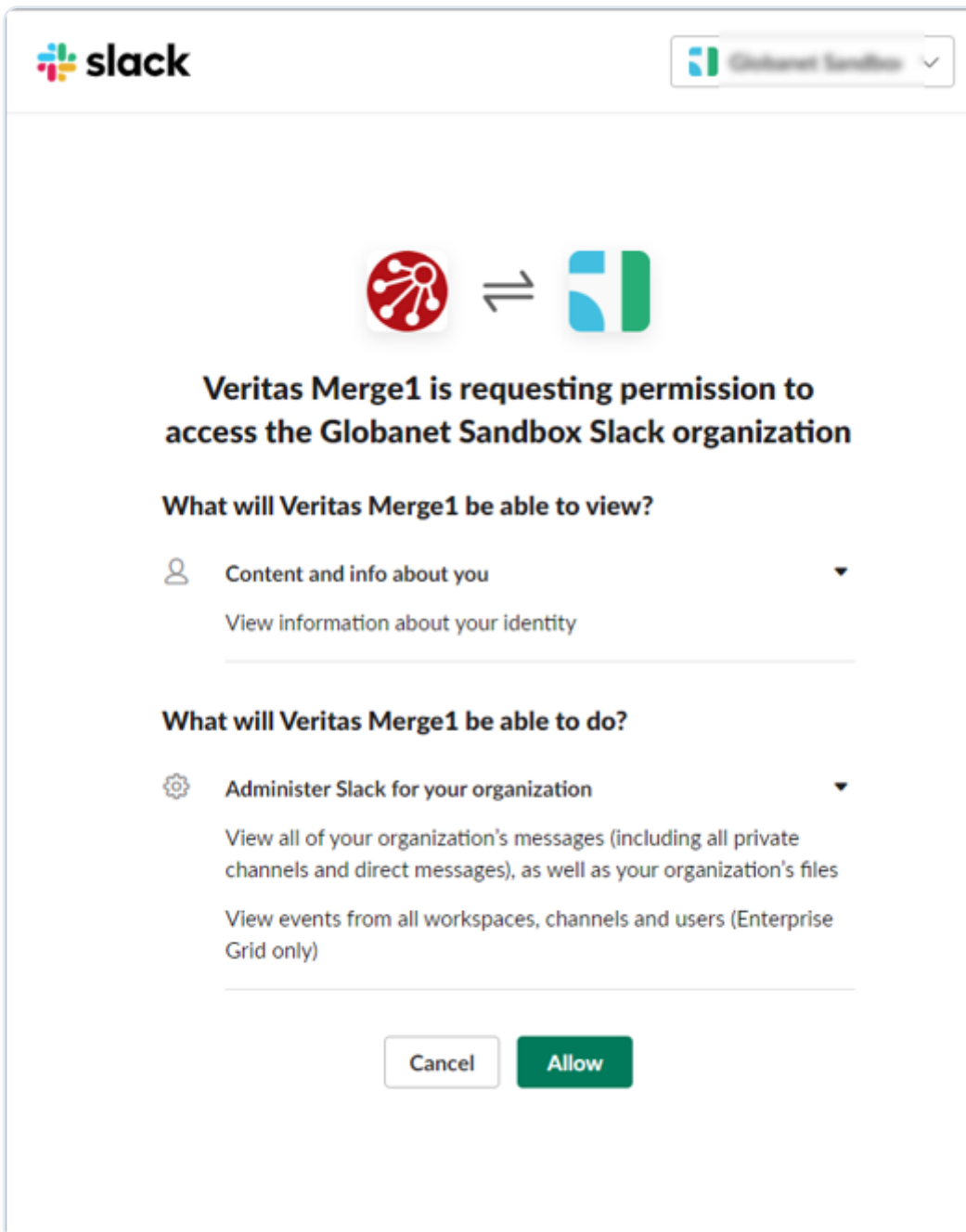
SLACK EDISCOVERY APPLICATION CONFIGURATION

Organization domain .slack.com

I have access token

NEXT

11. Authorize the connection between Slack eDiscovery and Arctera Insight Capture.



Timestamp Formatting

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 Date Time Format drop-down list.

TIME STAMP FORMATTING

Primary time zone

(UTC-08:00) Pacific Time (US & Canada) (PST) Secondary time zone

Date time format

*March 29 at 09:31 PM***Advanced Configuration Options**

There are the following advanced options when configuring the collector:

- Import Archived Channel \- when this option is selected, Merge1 imports the data from archive channels in Slack.
- The Subject prefix is added to the subject line of imported emails. For example, if entered subject prefix is "Slack". This is useful for organizing imported data, i.e., when multiple sources share a common target.
- Do not download data modified before and Do not download data modified after \- these options allow cutting off data outside the set date range. If the before date is set to 08/17/2022 and the after date is set to 08/25/2022, 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.

ADVANCED CONFIGURATION OPTIONS Import Archived Channel

Subject prefix

 Do not download data modified before: *1/18/2025* Do not download data modified after:

Attachments Configuration

There are the following options:

- The Include original data as attachment feature allows including/excluding original data as attachment by enabling/disabling the corresponding checkbox.
- When the Ignore Attachments checkbox is checked, all the attachments are being excluded from the message which will enhance the collector performance. Each message will contain only information and the link of the excluded attachment.
- 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 Custom Message field, a text for those excluded files can be specified. E.g., "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.

“ ”

Note: In case of using file filtering by size and by type, we recommend using custom messages.

“ ”

ATTACHMENTS CONFIGURATION

Include original data as attachment

Ignore attachments

Do not download files greater than megabyte(s).

Custom message

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.

File types

Custom message

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.

Message Body

There are the following output message body options:

- HTML - the message in the output will be displayed in the HTML format.
- Light grid mode - the message will be displayed in a light grid mode with limited metadata.
- Grid mode - this mode allows you to see the information in the five following columns:
 - UTC Time Stamp
 - Content Event Type
 - Message ID
 - Attachment
- Pure body - the messages will be displayed without any formatting.

MESSAGE BODY

- HTML
- Light grid mode
- Grid mode | [Select Style](#)
- Pure body

“ ”

Note: Light grid mode becomes active if the Merge messages by thread is activated and Pure body is activated in case Merge messages by thread is disabled.

“ ”

Next Steps

After setting up the collector, follow the links below to continue with the configuration of:

- [Monitored Users](#)
- [Filters](#)
- [Targets](#)
- [Importer Settings](#)

Symphony

Symphony provides secure enterprise collaboration. Users can communicate with internal and external teams, securely share documents and content, conduct meetings with conferencing and screen-sharing, leverage open APIs in the growing app ecosystem to streamline and automate work flows.

The Symphony collector works with XML format only. Make sure that the files are in the correct format. There are following mappings of XML tags to emails:

- `\<initiator\>` = From
- `\<sentTo\>` = To

- \<readBy\> = CC

“ ”

Note: The Symphony collector can process only zipped XML files.

“ ”

Activities Captured

- Post date
- From
- Message content
- Record type
- Message ID
- Attachment
- Downloaded by
- Event action
- Read by

Source Configuration

For information on how to configure the following sections of the Source tab, see:

- [File Source Configuration](#)
- [PGP Configurations](#)
- [Quarantine Location](#)
- [Miscellaneous Settings](#)
- [Attachment Validation](#)

Advanced Configuration Options

For this section:

- Merge Messages by Thread \- when selected, messages with identical thread IDs are grouped into individual emails (as opposed to receiving a separate email per message). It is possible to select additional fields (Downloaded By and Read By) to be added to the merged message.

- Use the timestamp of the first record as message timestamp \- selected only when Merge Messages by Thread is selected. When enabled, it uses the timestamp of the first Symphony message as a message timestamp, instead of the one of the last messages.
- Process messages with "IsArchived" tag \- when checked, messages that have the 'IsArchived' tag are processed as well.
- Ignore readby messages when checked, messages with ReadBy field in them will be ignored.

ADVANCED CONFIGURATION OPTIONS

Merge messages by thread

Use the timestamp of the first record as message timestamp

Process messages with "IsArchived" tag

Ignore readby messages

Split Messages

Splitting Messages option allows splitting big files. In the field 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.

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 Arctera Insight Capture.

SPLITTING MESSAGES

Split messages

(MB) Max size for each part of splitted message
Split size must be an integer

Include Record Type

In this section the types of records that should be processed from Symphony can be specified. At least one type should be selected. There are three types of records from Symphony that can be selected:

- Social Message
- Event
- Email Notification
- Reaction

INCLUDE RECORD TYPES

Social Message

Event

Email Notification

Reaction

Next Steps

After setting up the collector, follow the links below to continue with the configuration of:

- [Monitored Users \(N/A\)](#)
- [Filters](#)
- [Targets](#)
- [Importer Settings](#)

Text-Delimited

Text- Delimited is designed to allow rapidly developing text- delimited file processing. The objective of the collector is to map the text- delimited fields to email required format. The mapping is done based on the uploaded XML template. It varies from source to source; it must be written separately. For more details on the mapping, corresponding to the source, you are going to use it for, contact our support at [Arctera Support](#).

Activities Captured

- Messages

Captured messages can contain:

- Message subject
- Message headers
- Participants: From, To, CC, and BCC
- Activity datetime
- Message body

“ ”

Note: To process the files properly, the files and attachments that are going to be processed, should have the same name. **Note:** To process the attachments, add the full path to the attachment in the CSV document. To prevent files with similar names, we recommend creating attachments with folder structure to avoid clash of files with similar names shared on different days and in different conversations.

“ ”

Source Configuration

For information on how to configure the following sections of the Source tab, see:

- [File Source Configuration](#)
- [PGP Configurations](#)
- [Quarantine Location](#)
- [Miscellaneous Settings](#)

Collector Options

Upload an XML template and select the relevant time zone. Arctera Insight Capture will attempt to retrieve the correct time zone from the source automatically.

TEXT BASED COLLECTOR OPTIONS

Choose XML Template V2 file * UPLOAD

Download XML Template V2 DOWNLOAD

Source Time Zone file

UTC ▼

The XML file should contain the information about the file itself. It should specify if the file contains headers, the number of columns, delimiter type and the text qualifier. Next part of the XML file should assign column names, identify data types, and indicate if the columns are optional. Lastly, it should map the columns to the expected data fields: Sender, Participants, Title, ActivityDateTime, and Content.

If you want to manually set up the Source Time Zone, select the relevant one from the drop-down list. The Source Time zone setting will attempt to retrieve the time zone from the data itself automatically.

Message Body

This specifies how the imported message will be displayed in the target. The Plain Text mode organizes the data in a simple way and data displayed in a Light Grid Mode is two-toned, easy to be viewed with limited metadata.

MESSAGE BODY

Plain

Light grid mode

XML Template Configuration Guideline

To configure XML Template sample:

1. Configure the information about the file itself: if the file contains headers, number of columns, text qualifier and attachment method .

```
<?xml version="1.0" encoding="UTF-8"?>
```

```
<configuration> <version>AV_2.0</version>
```

```
<options>
```

```
<containsHeader>Yes</containsHeader>
```

```
<maxCols>8</maxCols>
```

```
<delimiter>","</delimiter>
```

```
<text_qualifier>"</text_qualifier>
```

```
<content_type>PlainText</content_type>
```

```
<attachmentMethod>Archive</attachmentMethod>
```

```
</options>
```

1. Assign column names, identify data type, and indicate if columns are optional.

```
<columns>
```

```
<column>
```

```
<order>1</order>
```

```
<name>FileName</name>
```

```
<datatype>StringList</datatype>
```

```
<datatype_options>
```

```
<delimiter>";"</delimiter>
```

```
<append>""</append>
```

```
</datatype_options>
```

```
</column>
```

```
<column>
```

```
<order>3</order>
```

```
<name>Start Date</name>
```

```
<datatype>DateTime</datatype>
```

```
<datatype_options> <format>XX/DD/YYYY HH:MM:SS</format> </datatype_options>
```

```
</column>
```

```
<column>
```

```
<order>5</order>
```

```
<name>Username</name>
```

```
<datatype>String</datatype>
```

```
</column>
```

```
<column>
```

```
<order>6</order>
```

```
<name>User Email</name>
```

```
<datatype>String</datatype>
```

```
</column>
```

```
<column>
```

```
<order>7</order>
```

```
<name>Participant Name</name>
```

```
<datatype>StringList</datatype>
```

```
<datatype_options>
```

```
<delimiter>";"</delimiter>
```

```
<append>""</append>
```

```
</datatype_options>
```

```
</column>
```

```
<column>
```

```
<order>8</order>
```

```
<name>Participant Email</name>
```

```
<datatype>String</datatype>
```

```
</column>
```

```
</columns>
```

1. The last part of the XML file maps the columns to the expected data fields: Sender, Participants, Title, ActivityDateTime, and Body and Threading:

```
<mappings>
```

```
<mapping can_be_empty = "Yes">
```

```
<property>Sender</property>
```

```
<items>
```

```
<item>User Email</item>
```

```
</items>
```

```
</mapping>
```

```
<mapping can_be_empty = "Yes">
```

```
<property>SenderName</property>
```

```
<items>
```

```
<item>Username</item>
```

```
</items>
```

```
</mapping>
```

```
<mapping can_be_empty = "Yes">
```

```
<property>Participants</property>
```

```
<items>
```

```
<item Role="To">Participant Email
```

```
</item>
```

```
</items>
```

```
</mapping>
```

```
<mapping can_be_empty = "Yes">
```

```
<property>ParticipantNames</property>
```

```
<items>
```

```
<item Role="To">Participant Name</item>
```

```
</items>
```

```
</mapping>
```

```
<mapping can_be_empty = "Yes">
```

```
<property>Title</property>
```

```
<items>
```

```
<item>Call Id</item>
```

```
<string>" "</string>
```

```
</items>
```

```
</mapping>
```

```
<mapping can_be_empty = "Yes">
```

```
<property>Content</property>
```

```
<items>
```

```
<string>"Call Id: "</string>
```

```
<item>Call Id</item>
```

```
<string>" "</string>
```

```
<string>"Start Date UTC: "</string>
```

```
<item>Start Date</item>
```

```
<string>"
```

```
"</string>
```

```
<string>"End Date UTC: "</string>
```

```
<item>End Date</item>

<string>"

"</string>

</items>

</mapping>

<mapping can_be_empty = "Yes">

<property>ActivityDateTime</property>

<items>

<item>Start Date</item>

</items>

</mapping>

<mapping can_be_empty = "Yes">

<property>Attachments</property>

<items>

<item>FileName</item>

</items>

</mapping>

<mapping can_be_empty = "Yes">

<property>X-KVS-MessageType</property>

<items> <string>"Telemessage"</string>

</items>

</mapping>

</mappings>

<threading disabled = "No">
```

```
<case_sensitive>No</case_sensitive>
```

```
<date_sort_direction>Ascending</date_sort_direction>
```

```
<items> <item>From Email</item>
```

```
<item>To Email</item>
```

```
</items>
```

```
</threading>
```

```
</configuration>
```

“ ”

Note: Threading is configured if it is required.

“ ”

Next Steps

After setting up the collector, follow the links below to continue with the configuration of:

- [Monitored Users \(N/A\)](#)
- [Filters](#)
- [Targets](#)
- [Importer Settings](#)

X (Twitter)

X (Twitter) is an online news and social networking site where people communicate in short messages called tweets. The X (Twitter) collector does not work with a proxy server.

“ ”

Note: X (Twitter) business/professional accounts are not supported.

“ ”

Activities Captured

- GIFs captured as links
- GIF post texts
- Attachments captured as links
- Comments
- Retweets
- Quote tweets
- Emojis
- Tweets to time lines
- Poll post note (poll options are not captured)

“ ”

Note: Follows and direct messages are not captured.

“ ”

Creating an X (Twitter) Application

To create an X (Twitter) app:

1. Log in to <https://developer.twitter.com/apps>.
2. Click Create New App.
3. Complete the form by:
 - Providing a name for the application, i.e., "Insight Capture X (Twitter) App".
 - Entering the URL of your organization's website.
 - Entering the URL of your local environment with the following format: `/ArcteraInsightCapture_instance/Configuration/OAuthCallback.`
 - Agreeing to the terms of service.
4. Click Create.

5. Open the Keys and Tokens tab, to view the OAuth 2.0 Client ID and Client Secret.

Source Configuration

To set up the collector:

1. Provide your X (Twitter) Application ID.
2. Enter the Application Secret/Key.
3. Click Save.

CONFIGURATION WIZARD

SOURCE MONITORED USERS FILTERS TARGETS SETTINGS

Please provide the following credentials to your company's X (Twitter) app so that Arctera Insight Capture can be configured to access your monitored users' account data.

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

X (TWITTER) APPLICATION CONFIGURATION

Application ID

Application secret/key

NEXT

Timestamp Formatting

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 Date Time Format drop-down list.

TIME STAMP FORMATTING

Primary time zone

(UTC-08:00) Pacific Time (US & Canada) (PST) Secondary time zone

Date time format

*March 29 at 09:31 PM***Advanced Configuration Options**

To configure advanced options:

1. Specify the Subject Prefix in the subject line of imported emails. This is useful for organizing imported data, i.e., when multiple sources share a common target.
2. Specify Do not download data modified before and Do not download data modified after to allow cutting off data outside the set date range. If the before date is set to 08/17/2023 and the after date is set to 08/25/2023, only the data between these two dates will be downloaded. Data outside that range will be ignored. Note that both options can be used independently as well.

ADVANCED CONFIGURATION OPTIONS

Subject prefix

 Do not download data modified before:*1/16/2025* Do not download data modified after:**Next Steps**

After setting up the collector, follow the links below to continue with the configuration of:

- [Monitored Users for Twitter](#)
- [Filters](#)
- [Targets](#)
- [Importer Settings](#)

UBS

UBS provides financial advice and solutions to private, institutional, and corporate clients worldwide.

Activities Captured

- Datetime
- First name
- Last name
- Company name
- Says
- Content
- Participant's full name
- Email
- User ID

Source Configuration

For information on how to configure the following sections of the Source tab, see:

- [File Source Configuration](#)
- [PGP Configurations](#)
- [Quarantine Location](#)
- [Miscellaneous Settings](#)

UBS Options

Arctera Insight Capture enables you to validate the UBS attachments. You can either group all messages based on participants or you can group messages by date.

UBS OPTIONS Group messages by participants Group messages by dateGrouping interval: hours

You can also set grouping interval. The time is calculated in hours.

Next Steps

After setting up the collector, follow the links below to continue with the configuration of:

- [Monitored Users \(N/A\)](#)
- [Filters](#)
- [Targets](#)
- [Importer Settings](#)

Web Page Capture

The Web Page Capture collector captures the web pages. It captures a specific web page and the links on the page at a configurable through the collector UI level by the provided URL, retrieves its appearance and imports it in PDF, PNG, and custom formats, that can be specified in a JSON file.

Activities Captured

- Web page in PDF
- Web page in PNG
- Web page in custom formats

“ ”

Note: Heavy pages with the depth of capture more than 1 may be captured not fully, as all the pages may not be loaded completely by the time of the capture.

“ ”

URLs Configuration

To configure URLs:

1. Click +Add Configuration Group.
2. Enter the Group Name for the output files of the captured URL.
3. Select the Output Format. It can be a PDF, PNG, or custom format file. For the custom format, contact our support at Arctera Support.
4. Enter the website URL from which the capture should start.
5. Choose the capture mode: Full Domain or One Page. One Page captures only the entered URL. Full Domain captures the mentioned URL and the pages that open from it with the same domain on the mentioned depth.
6. The depth is the level of the pages on the site map that should be captured. It includes the main website URL given in the configuration and the site pages below it on the site map. For Example, if the depth is 1, the Web Capture collector captures the filled in website URL and all the pages that open from that URL and have the same URL in their URLs.

URLS CONFIGURATION

[+ ADD CONFIGURATION GROUP](#)

URLS GROUP - ⚙️ - ✕

Group name *

Output format * PDF file (.pdf) ▼

URLS

Website URL	Capture mode	Depth	+
	Full domain ▼	1	✕

Message Construction

As the messages generated by the Web Page Capture collector do not have senders or recipients, from and to email addresses need to be entered manually for the output email files to be generated. It is recommended to use existing email address in the From Email Address field, to avoid it being sent to the SPAM folder if the target of the collector is a mailbox.

MESSAGE CONSTRUCTION

From Email Address *

To Email Address *

Time Stamp Formatting

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 Date Time Format drop-down list.

TIME STAMP FORMATTING

Primary time zone
(UTC-08:00) Pacific Time (US & Canada) (PST)

Secondary time zone

Date time format
March 29 at 09:31 PM

Advanced Configuration Options

The Subject Prefix feature will add a prefix before the message subject to facilitate the search in the target.

ADVANCED CONFIGURATION OPTIONS

Subject prefix

Next Steps

After setting up the collector, follow the links below to continue with the configuration of:

- [Monitored Users \(N/A\)](#)
- [Filters](#)
- [Targets](#)
- [Importer Settings](#)

WhatsApp

WhatsApp is a communication app developed by Meta Platforms. It enables users to send messages, voice notes, photos, videos, documents, and more to other devices via the internet.

The Arctera Insight Capture WhatsApp collector allows organizations to seamlessly integrate WhatsApp data into their comprehensive communication management systems.

Following the successful onboarding of your devices on [Sausalito Labs](#), please proceed with configuring your importer.

Activities Captured

- Text messages
- Edits

“ ”

Note: Only the last version of edited messages is captured.

“ ”

- Emojis

- Replies
- Deleted messages for everyone

“ ”

Note: Only the events are captured; the content of the message is not captured.

“ ”

- Mentions
- Documents (MS Word, MS Excel, PDF, PPT)
- Images
- Videos
- Emojis
- GIFs
- Links
- Music
- Apps from Store (App link)
- Drawing
- AI Imagine
- Stickers

“ ”

Note: Unknown sticker types are not captured.

“ ”

- Audio messages
- Reaction to message by emoji
- Messages with image
- Messages with video

Source Configuration

For information on how to configure the following sections of the Source tab, see:

- [File Source Configuration](#)
- [PGP Configurations](#)
- [Quarantine Location](#)
- [Miscellaneous Settings](#)

Advanced Configuration Options

If Include original data as attachment is enabled, the XML file will be attached to the output message.

ADVANCED CONFIGURATION OPTIONS

[Include original data as attachment](#)

Next Steps

After setting up the collector, follow the links below to continue with the configuration of:

- [Monitored Users \(N/A\)](#)
- [Filters](#)
- [Targets](#)
- [Importer Settings](#)

Workplace from Facebook

Workplace is an enterprise connectivity platform developed by Facebook, Inc. and featuring tools like groups, instant messaging, and News Feed. Workplace allows third parties to fetch data from its APIs for Compliance and eDiscovery purposes - this is achieved by using Custom Integrations.

Custom Integrations are not available in the free Workplace plans, customers who need to meet Compliance and eDiscovery must have a Premium plan.

Activities Captured

Chats:

- One-on-one chats
- Group chats
- Attachments in chats
- Deleted messages and attachments in chats (if only one chat participant has deleted the message)
- "Add" events in group chats

Posts:

- Group posts (except multi-company groups, and main posts of buy & sell groups)
- Attachments

“ ”

Note: Workplace side internal server error occurs in case of having 80+ attachments.

“ ”

- Polls (without attachments)
- GIFs Emojis GIF posts (mp4 format only)
- Likes & reactions to posts
- Comments and replies

“ ”

Note: Specify the number of previous days (maximum 31) prior to the current run for Insight Capture to scan for edits and new comments of a post.

“ ”

- Photos
- Posts in MD format (without formatting)

- "Create" events (only images)
- Create doc posts in TXT format (without image)
- Live videos
- Latest versions of posts (except attachments)

Activities not Captured

Chats:

- Polls
- Reply to
- Reactions

Group posts:

- Timeline activities
- Deleted group posts
- Tagging coworkers
- Check-ins
- Feeling/Activity
- Comments deleted
- Created events
- Hidden chats
- Posts created on someone's timeline
- Previous versions of posts

Custom Integration Creation in Workplace

Workplace from Facebook allows third parties to fetch data from its APIs for Compliance and eDiscovery purposes - this is achieved by using Custom Integrations.

“ ”

Note: Custom Integrations are not available in free Workplace plans, so customers who need to meet Compliance and eDiscovery must have a Premium plan.



To create a custom integration:

1. Login to workplace using a System Administrator account.
2. Navigate to <https://my.workplace.com/work/admin/apps/>.
3. Sign in if prompted to.
4. Click Create Custom Integration.
5. Enter a name for the Integration and click Create.
6. Copy App ID and App Secret.
7. Click Create Access Token and copy the generated token.
8. If Discoverable is set to Yes, change it to No. This is not required but it is best practice to make sure the users are not aware of existence of the application.
9. Under Integration Permissions, enable the following permissions:
 - Read group content
 - Read user timeline
 - Read all messages
 - Read user email
 - Read group membership
 - Message any member
 - Allow this integration to work in group chats
10. To make sure the permissions remain available for the collector, disable Automatically remove unused permissions. This is not required; you can leave it on for better security, but you might need to come back to this page and re-add the permissions.



Note: Facebook allows you to scope the App's permissions to specific groups. This is recommended if you only need to monitor users of the certain groups.



11. Enable Require App Secret Proof and allow list the public IP addresses of your Arctera Insight Capture server(s), gateways and/or proxy server(s).

Source Configuration

To configure the collector:

1. Enter the App ID copied in the Step 6 of the previous section in the Application ID field.
2. Enter App Secret in the Application Secret/Key field.
3. Enter Access Token in the Access Token field.

CONFIGURATION WIZARD

SOURCE MONITORED USERS FILTERS TARGETS SETTINGS

Please provide the following credentials to your company's Workplace from Facebook app so that Arctera Insight Capture can be configured to access your monitored users' account data.

If you do not have an app created for Workplace from Facebook, please [click](#) for more information.

WORKPLACE FROM FACEBOOK APPLICATION CONFIGURATION

Application ID	<input type="text"/>
Application secret/key	<input type="text"/>
Access token	<input type="text"/>

NEXT

Timestamp Formatting

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 Date Time Format drop-down list.

TIME STAMP FORMATTING

Primary time zone

(UTC-08:00) Pacific Time (US & Canada) (PST)

 Secondary time zone

Date time format

March 29 at 09:31 PM

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 Custom Message field, a text for those excluded files can be specified. E.g., "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.

ATTACHMENTS CONFIGURATION Do not download files greater than megabyte(s).

Custom message

This message will be added to the email body.

**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.**

File types

Custom message

This message will be added to the email body.

**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.**

Advanced Configuration Option

To configure advanced options:

1. Specify the Subject Prefix in the subject line of imported emails. This is useful for organizing imported data, i.e., when multiple sources share a common target.

“ ”


Note: Not applicable to the EV Folder target.


“ ”

2. Specify Do not download data modified before and Do not download data modified after to allow cutting off data outside the set date range. If the before date is set to 08/17/2023 and the after date is set to 08/25/2023, only the data between these two dates will be downloaded. Data outside that range will be ignored. Note that both options can be used independently as well.
3. Specify the number of the previous days (0-31) prior to the current run so that Insight Capture can scan for edits and new comments of a post.

ADVANCED CONFIGURATION OPTIONS

Subject prefix

Do not download data modified before: 

Do not download data modified after: 

Posts history check (days)

Specify the number of previous days (maximum 31) prior to the current run for Alta Capture to scan for edits and new comments of a post.

Next Steps

After setting up the collector, follow the links below to continue with the configuration of:

- [Monitored Users](#)

- [Filters](#)
- [Targets](#)
- [Importer Settings](#)

XIP

Greenwich Associates is the leading global provider of market intelligence and advisory services to the financial services industry. They specialize in providing fact-based insights and practical recommendations to improve business results.

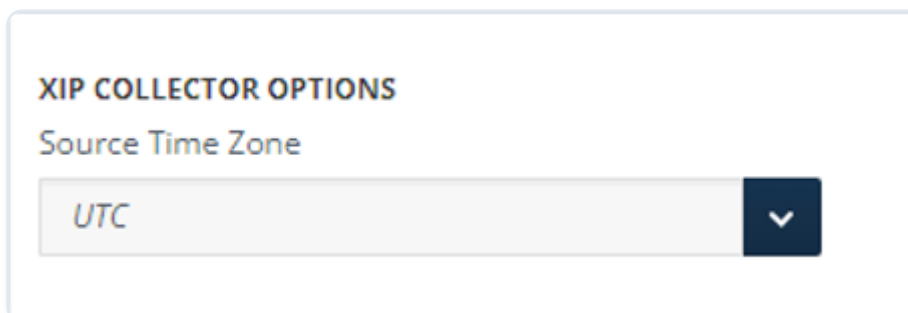
Source Configuration

For information on how to configure the following sections of the Source tab, see:

- [File Source Configuration](#)
- [PGP Configurations](#)
- [Quarantine Location](#)
- [Miscellaneous Settings](#)

XIP Collector Options

If you want to manually set up the Source Time Zone, select the relevant one from the drop-down list.



The image shows a configuration panel titled "XIP COLLECTOR OPTIONS". Below the title is the label "Source Time Zone". A dropdown menu is displayed with "UTC" selected and a dark blue arrow pointing downwards on the right side of the menu.

Arctera Insight Capture assumes that the messages in the source file are of the set time zone and based on that data the dates in the messages are processed to UTC time zone. By default, Source Time Zone is set as the Local Time Zone.

Next Steps

After setting up the collector, follow the links below to continue with the configuration of:

- [Monitored Users \(N/A\)](#)
- [Filters](#)

- [Targets](#)
- [Importer Settings](#)

XSLT/XML

Arctera Insight Capture XSLT/XML collector allows our customers to rapidly transform XML file using XSLT to a predefined format. Once XML is transformed, the XML can be processed by generating the required mapping "From" "To" "Subject" "Date" "body" fields to appropriate elements of the XML file. The mapping varies from source to source, and it must be written separately.

Contact [Arctera Support](#) to get the template and the signature file corresponding to the source you are going to use it for.

Activities Captured

- Messages

Captured messages can contain:

- Message subject
- Message headers
- Participants: From, To, CC, and BCC
- Activity datetime
- Message body

Source Configuration

For information on how to configure the following sections of the Source tab, see:

- [File Source Configuration](#)
- [PGP Configurations](#)
- [Quarantine Location](#)
- [Miscellaneous Settings](#)

XSLT Collector Options

To configure the section:

1. Upload the signed XSLT template.
2. Upload the Signature file.

“ ”

Note: Templates must be reviewed and cryptographically signed by Arctera.

“ ”

XSLT COLLECTOR OPTIONS

Choose XSLT V2 file *	UPLOAD
Download XSLT V2 file	DOWNLOAD
Choose Signature file *	UPLOAD
Download Signature file	DOWNLOAD

Next Steps

After setting up the collector, follow the links below to continue with the configuration of:

- [Monitored Users \(N/A\)](#)
- [Filters](#)
- [Targets](#)
- [Importer Settings](#)

Verba

Verba is a call recording and communications compliance solution, typically used for recording, monitoring, and analyzing voice, video, and messaging interactions in corporate or regulated environments. The collector acquires and processes files exported from Verba. It supports ingestion of paired files which include a CSV file and its corresponding media file.

Activities Captured

- [Calls](#)

Captured activities can contain:

- Verba call ID
- Platform call ID
- Call start date time
- Call end date time
- Call duration
- Storage target
- Attachments

Source Configuration

For information on how to configure the following sections of the Source tab, see:

- [File Source Configuration](#)
- [PGP Configurations](#)
- [Quarantine Location](#)
- [Miscellaneous Settings](#)

Advanced Configuration Options

If Include original data as attachment is enabled, the XML file will be attached to the output message.

ADVANCED CONFIGURATION OPTIONS

Include original data as attachment

Next Steps

After setting up the collector, follow the links below to continue with the configuration of:

- [Monitored Users \(N/A\)](#)
- [Filters](#)
- [Targets](#)

- [Importer Settings](#)

Verint

Verint recording is a full-time compliance recording solution that can be deployed on-premises or in hybrid cloud environments. It lets you capture, ingest, aggregate, and manage interaction data across all voice and digital channels.

The Arctera Insight Capture Verint collector is a file-based collector to parse Avaya and Cisco call XML formatted interaction file sources.

Activities Captured

- Recorded calls

Captured messages can contain:

- Call start time (as a timestamp)
- Call duration
- Audio attachment files in WAV format
- Subject
- Participants
- Message body

Source Configuration

For information on how to configure the following sections of the Source tab, see:

- [File Source Configuration](#)
- [PGP Configurations](#)
- [Quarantine Location](#)
- [Miscellaneous Settings](#)

Advanced Configuration Options

If Include original data as attachment is enabled, the XML file will be attached to the output message.

ADVANCED CONFIGURATION OPTIONS

Include original data as attachment

Next Steps

After setting up the collector, follow the links below to continue with the configuration of:

- [Monitored Users \(N/A\)](#)
- [Filters](#)
- [Targets](#)
- [Importer Settings](#)

Viva Engage (Yammer)

Viva Engage (Yammer) is a collaboration tool that helps users and their teams to stay on top of it all. They can start conversations, work together on files, and organize around projects. The collector securely captures and delivers data for seamless archiving, regulatory compliance, and structured communication management, helping organizations maintain transparency while preserving valuable insights.

Activities Captured

- Posts in public and private groups
- Comments and replies of posts in public and private groups
- Private messages

“ ”

Note: Unless the conversation has been started by an external user.

“ ”

- Attachments (including SharePoint files)

- Edit activities of posts/comments/replies/private messages
- Polls

“ ”

Note: Votes are not captured. **Note:** The poll options for deleted polls are displayed on the same line.

“ ”

- Praise (the text of the praise and the replies)
- Announcements (the text of the announcement and replies)
- Deleted private messages, posts, and comments (including attachments)

“ ”

Note: The delete event of the message/post will be captured in case there is a create/edit activity before the Arctera Insight Capture run.

“ ”

Notes

- Attachments are not captured in the following cases:
 - If the shared file has restrictions such as an expired link, password protection, or access limitations.
 - If the file was shared and then deleted.
 - If a file's link was shared but the site where the file is located has undergone changes.
- If messages are GDPR hard deleted, the attachments (if it has any) cannot be captured due to the source limitation.
- A dummy SMTP address is created for a deleted message which is missing the `deleted_by_id` field.
- GDPR hard deleted and soft deleted messages are captured as deleted. Legal Hold should be enabled so the attachments are not deleted from the SharePoint site.

- When sharing an already existing file from SharePoint, the attachment will not be captured - only the URL of that attachment will be retrieved.
- The created message does not say it was deleted from Viva Engage (Yammer). To capture the deletes, the data retention setting needs to be set to Delete. See instructions at [Manage Viva Engage \(Yammer\) Data Compliance](#).
- Events of former members are not captured due to limited permissions of admin-generated token.
- For files larger than 2 GB, a link for that attachment will be created and included in the body of the output message with a warning in the log that the file is larger than 2 GB.
- A separate Import folder path should be provisioned on the Source Configuration tab for each Viva Engage (Yammer) collector when running 2 or more collectors simultaneously.
- Enabling the Merge messages by thread feature may impact the performance of the collector processing.
- If a message is created with an attachment and later edited to remove only the attachment, the deletion event will not be captured due to source limitations.
- Microsoft APIs do not support SharePoint link-sharing activities, including file protection features (passwords, expiration dates, download restrictions, and specific permissions) or cases where the file is deleted or the site becomes inaccessible during the run process.

Microsoft Entra ID App Creation

To authenticate via OAuth during the collector configuration, you need to create a Microsoft Entra ID Application.

To create an app:

1. Create an O365 account and open [Azure Portal](#) using the same credentials as for O365 (Global Admin).
2. Click Microsoft Entra ID at the top of the page and select App Registration from the left-side navigation pane.
3. Click the +New registration button.
4. Enter a Name for the application and click Register.
5. Enter the enter the URL of your local Arctera Insight Capture environment.



Note: The Redirect URI can be found in the Click information of the collector source configuration.

“ ”

6. Find and make a note your Application (client) ID and Directory(tenant) ID as this is needed for configuring the collector in Arctera Insight Capture.
7. In the navigation pane to the left, go to Certificates & secrets.
8. Click the Upload certificate button.
9. Select a certificate (public key) with one of the following file types: .cer,.pem, .crt, and click Add. For more information on how to create a certificate, see [Creating a Certificate \(Private and Public Keys\)](#).

To add a client secret:

1. In the left-hand navigation pane, go to Manage > Certificates & secrets.
2. Go to Client secrets and click New client secret.
3. Enter a Description, specify a Duration. Click Add.
4. Locate and save the new client secret value for configuring the collector.

Microsoft Entra ID Permissions

For permissions:

1. In the navigation pane to the left, click API permissions.
2. In the opened pane, select the Yammer API.
3. Click Delegated permissions, add the following permission: Other permissions: user_impersonation, and click Add permissions.
4. Click \+ Add a permission and select SharePoint API with Application permissions. Add the Sites:Sites.Read.All permission and click Add permission:
5. Grant all the above-mentioned permissions.

Source Configuration

To configure the Viva Engage (Yammer) application:

1. Add the saved Directory (tenant) ID and Application (client) ID in the Directory ID and Application ID fields, respectively.

2. Add the saved client secret value in the Application secret/key field and click Next.

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' (selected), 'MONITORED USERS', 'TARGETS', and 'SETTINGS'. The main content area contains the following text:

Please provide the following credentials to your company's Viva Engage (Yammer) app so that Arctera Insight Capture can be configured to access your monitored users' account data.

If you do not have an app created for Viva Engage (Yammer), please [click](#) for more information.

VIVA ENGAGE (YAMMER) APPLICATION CONFIGURATION

Directory ID

Application ID

Application secret/key

At the bottom right of the wizard is a dark blue button labeled 'NEXT'.

3. A pop-up window will open (ensure that the pop-ups are not disabled in the browser window). Click Accept to let the app access the specified resources for all users in the organization.

“ ”

Note: To authenticate with Arctera Insight Capture, the user must have the Global Administrator role assigned in the Azure Portal. In addition, to use Arctera Insight Capture, the user must be a Yammer Administrator in the Azure Portal and a Verified Admin in the Yammer Admin Portal. Note that these permissions must remain active while being in use by Arctera Insight Capture. Removing or restricting them may cause authentication issues or importer run failures.

“ ”

To configure the source:

1. For Viva Engage (Yammer) Application configuration, enter Application ID and Application secret/key.
2. To capture SharePoint files, enable the Process files stored in SharePoint checkbox. The following Azure application credentials are required to capture the content:
 - Directory (Tenant) ID
 - Application (Client) ID
3. Select the X.509 Certificate file.
4. Enter the X.509 Certificate password. The Certificate thumbprint field will be auto populated in case the collector was previously configured by uploading a certificate.

VIVA ENGAGE (YAMMER) CONFIGURATION

Process files stored in SharePoint

AZURE APPLICATION CONFIGURATION

Directory (Tenant) ID

Application (Client) ID

X.509 Certificate file

X.509 Certificate password

Threading and Formatting

For Threading and Formatting:

- Merge messages by thread \- this combines all messages in a thread into a single message. Only a single post, message, poll, announcement, or praise with its comments and replies is threaded into a single output message.
- Select the Message time zone from the drop-down menu. When the Process Incomplete Days option is enabled, the messages for days that have not yet ended will be imported in a separate email as well.

THREADING AND FORMATTING Merge messages by thread

Message time zone

(UTC-08:00) Pacific Time (US & Canada) (PST) Process incomplete days**Message Body**

There are the following output message body options:

- Plain - this mode displays the message as simple text.
- HTML - the message in the output will be displayed in the HTML format.
- Light grid mode - the message will be displayed in a light grid mode with limited metadata.
- Pure body - the messages will be displayed without any formatting.

“ ”

Note: Light grid mode becomes active if the Merge messages by thread is activated and Pure body is activated in case Merge messages by thread is disabled.

“ ”

MESSAGE BODY

- Plain
- HTML
- Light grid mode
- Pure body

Advanced Configuration Options

There are the following advanced options when configuring the Viva Engage (Yammer) collector:

ADVANCED CONFIGURATION OPTIONS

Subject prefix

 Do not download data modified before:

1/16/2025

 Do not download data modified after:

- Subject prefix\- this is added to the subject line of imported emails and is useful for organizing imported data, i.e., when multiple sources share a common target.

“ ”

Note: Not applicable to the EV Folder target.

“ ”

- 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 08/17/2021 and the after date is set to 08/25/2021, only the data between these two dates will be downloaded. Data outside that time frame will be ignored. Note that both options can be used independently as well.
- In the Content capturing section, you can choose either capturing all content or only private content by enabling the corresponding radio button.

CONTENT CAPTURING Capture all content Capture private content

Attachments Validation

Arctera Insight Capture enables you to develop customized notes for attachments validation. In case Fail Messages with missing data set is selected, the messages that do not have data set are failed.

If you select the Replace missing attachments with the following note and input your custom note, all the missing attachments of the messages will not be processed, and you will see only the custom message that you have entered.

ATTACHMENTS VALIDATION

Replace missing attachments with the following note:

This message contained the following attachments that act

Fail messages with missing data set.

Attachments Configuration

There are the following configuration options:

- The Include original data as attachment feature allows including/excluding original data as attachment by enabling/disabling the corresponding checkbox.
- When the Ignore Attachments checkbox is enabled, all the attachments are excluded from the message which will enhance the collector performance. Each message will contain only information and the link of the excluded attachment.
- 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 Custom Message field, a text for those excluded files can be specified. E.g., "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.

ATTACHMENTS CONFIGURATION

Include original data as attachment

Ignore attachments

Do not download files greater than megabyte(s).

Custom message

Example: Files {0} are not imported, because they are greater than {1} megabyte(s). All the filenames that were excluded will be written instead of {0} symbol. File size limit will be written instead of {1} symbol.

File types

Custom message

example: Files {0} are not imported. All the filenames that were excluded will be written instead of {0} symbol.

Splitting Messages

This option allows splitting large files. In the field 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.

SPLITTING MESSAGES

Split messages

(MB) Max size for each part of splitted message

Split size must be an integer

Next Steps

After setting up the collector, follow the links below to continue with the configuration of:

- [Monitored Users](#)

- [Filters](#)
- [Targets](#)
- [Importer Settings](#)

Yieldbroker

Yieldbroker is the leading Tier 1 licensed electronic trading platform for Australian and New Zealand debt securities and derivatives. It is a dynamic collector that brings Banks, Portfolio Managers, Treasuries and Risk Managers together in a trusted trading environment with unrivalled liquidity and coverage of the AUD and NZD debt capital markets. The Yieldbroker collector processes data from Yieldbroker messages.

Activities Captured

- Participant names and email addresses in the To, From, CC, and BCC fields
- Messages in the body of the output message
- Sender and Recipient company names in the body along with messages
- Thread ID in the message subject

Source Configuration

For information on how to configure the following sections of the Source tab, see:

- [File Source Configuration](#)
- [PGP Configurations](#)
- [Quarantine Location](#)
- [Attachment Validation](#)
- [Miscellaneous Settings](#)

Advanced Configuration Options

The Merge messages by thread option combines all messages in a thread into a single message.

ADVANCED CONFIGURATION OPTION

Merge messages by thread

Message Body

This specifies how the imported message will be displayed in the target. The Plain text mode organizes the data in a simple way and data displayed in a Light grid mode is two-toned, easy to be viewed with limited metadata.

MESSAGE BODY

Plain

Light grid mode

Next Steps

After setting up the collector, follow the links below to continue with the configuration of:

- [Monitored Users \(N/A\)](#)
- [Filters](#)
- [Targets](#)
- [Importer Settings](#)

YouTube

YouTube is an online video sharing and social media platform owned by Google. It acts as a social network by allowing users with a Google account to watch and upload their videos, comment on videos, rate and respond to comments, like or dislike videos, etc.

Activities Captured

- Comments/replies of channel discussions
- Comments/replies of videos on channel playlists
- Comments/replies of uploaded videos
- Edits of comments/replies (only the latest version)
- Likes count
- Video view counts



Note: Deleted comments and replies are not captured due to the YouTube API limitations.

“ ”

Creating a YouTube Application

To create a YouTube application, the user should:

- Create a new project
- Create credentials
- Manage domain-wide authority delegations.

To create a new project:

1. Sign in to [Google Cloud Platform](#).
2. Click Select a project, then NEW PROJECT.
3. Enter a name for the project and click CREATE.
4. Once the project is created, click SELECT PROJECT from the Notifications and you are navigated to the Project page.
5. From the left side navigation menu, select APIs & Services > Dashboard.
6. Click ENABLE APIS AND SERVICES.
7. In the Search for APIs & Services search box, type `YouTube Data API v3`.
8. Click YouTube Data API v3.
9. Once you are in the Gmail API page, click ENABLE.

To create the credentials:

1. From the left side navigation menu, select APIs & Services > Credentials.
2. Click CREATE CREDENTIALS and select OAuth client ID.
3. From the Application type drop-down menu, select Web application.
4. Enter the name for the application.
5. In the Authorized redirect URIs section, click ADD URI and add the URL of your local Arctera Insight Capture environment and click CREATE.

“ ”

Note: The Redirect URI can be found in the Click information of the collector source configuration.

“ ”

6. Copy and save the Client ID and Client ID from the created OAuth client pop-up window.

To manage Domain-Wide Authority Delegation:

1. Sign in to [Google Admin Console](#).
2. On the left side menu, click Security > API controls.
3. Scroll down to Domain wide delegation section and click MANAGE DOMAIN WIDE DELEGATION.
4. Click Add new.
5. Enter the above saved Client ID in the Client ID field, add the following scopes in the OAuth scopes fields:

- `https://www.googleapis.com/auth/youtube`
- `https://www.googleapis.com/auth/youtube.force-ssl`
- `https://www.googleapis.com/auth/youtube.readonly`
- `https://www.googleapis.com/auth/youtubepartner`

6. Click AUTHORIZE.

“ ”

Note: By using this importer, you are agreeing to the YouTube terms at <https://www.youtube.com/t/terms>, <https://policies.google.com/privacy>.

“ ”

Source Configuration

To set up the collector:

1. In the Application ID field, enter Client ID copied previously.
2. In Application secret/key, enter the copied Client Secret and click Next.

CONFIGURATION WIZARD ✕

SOURCE | MONITORED USERS | FILTERS | TARGETS | SETTINGS

Please provide the following credentials to your company's YouTube app so that Arctera Insight Capture can be configured to access your monitored users' account data.

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

YOUTUBE APPLICATION CONFIGURATION

Application ID

Application secret/key

I have access token

NEXT

Timestamp Formatting

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 Date Time Format drop-down list.

TIME STAMP FORMATTING

Primary time zone

(UTC-08:00) Pacific Time (US & Canada) (PST) ▼

Secondary time zone

▼

Date time format

March 29 at 09:31 PM ▼

Threading

For Threading:

- If the No threading radio button is activated, only a single message is generated for a comment or reply.
- If One parent comment with replies is activated, then a threaded message is generated for comments and replies.
 - The Message time zone by which the messages are split based on the selected time zone from the drop-down menu. When Process Incomplete Days option is enabled, the messages of the days that have not yet ended will be imported in a separate email as well. This option can be selected only if One parent comment with replies is activated.

THREADING

No threading
 One parent comment with replies

Message time zone

Process incomplete days

Message Body

This specifies how the imported message will be displayed in the target. The HTML mode organizes the data in a simple way and data displayed in a Light grid mode is two-toned, easy to be viewed with limited metadata.

MESSAGE BODY

HTML
 Light grid mode

Advanced Configuration Options


To configure advanced options:


1. Specify the Subject Prefix in the subject line of imported emails. This is useful for organizing imported data, i.e., when multiple sources share a common target.

2. Specify Do not download data modified before and Do not download data modified after to allow cutting off data outside the set date range. If the before date is set to 08/17/2024 and the after date is set to 08/25/2024, only the data between these two dates will be downloaded. Data outside that time frame will be ignored. Note that both options can be used independently as well.

ADVANCED CONFIGURATION OPTIONS

Subject prefix

Do not download data modified before:
 

Do not download data modified after:
 

Next Steps

After setting up the collector, follow the links below to continue with the configuration of:

- [Monitored Users \(N/A\)](#)
- [Filters](#)
- [Targets](#)
- [Importer Settings](#)

Zoom Chat

Zoom is the leader in modern enterprise video communications, with an easy, reliable cloud platform for video and audio conferencing, chat, and webinars.

Zoom Team Chat is a messenger that allows users with free and paid accounts to facilitate communications between Zoom users. With Zoom Team Chat, you can send texts, audio, and video messages, as well as share files, emojis, screenshots, and so on.



Note: The Zoom account used for the Zoom Chat collector needs to be on the Business or Enterprise plan to gain access to the API. Note that the Pro plan is not supported.

“ ”

Activities Captured

- One-on-one chat messages
 - Create
 - Edit
 - Delete
- Group chat messages
 - Create
 - Edit
 - Delete
- Channel messages
 - Create
 - Edit
 - Delete
- Membership activities (joined/left)

Captured messages can contain:

- Links

“ ”

Note: Both inserted and regular links are captured.

“ ”

- Emojis
- Attachments

- Forwarded messages

“ ”

Note: Deleted forwarded messages are not captured due to the API limitation.

“ ”

- Voice messages
- Video messages
- Code snippets
- Hosted GIFs

“ ”

Note: The link of the GIFs only is captured due to the API limitation. **Note:** Chats only from the last 6 months can be captured. **Note:** Text formatting (rich text) is captured as plain text. **Note:** Message reactions are not captured due to the API limitation.

“ ”

Creating a Zoom OAuth App

To create an OAuth application:

1. Sign in to Zoom Marketplace.
2. Select Develop > Build App.
3. Select General App and click Create.
4. A Client ID and Client secret will be generated. Use these credentials to configure the collector.
5. On the Basic Information page, under Select how the app is managed, choose Admin-managed and click Save.
6. Give an app name, choose Account-level app, disable Publishing to Marketplace and click Create.
7. Copy the Client ID and the Client Secret. They will be used later to configure the Zoom collector.

- Under OAuth Information add the URL of your local environment in the following format: `https://<your_instance>/Configuration/OAuthCallback` to the OAuth Redirect URL. Ensure that OAuth Allow lists field is filled with the same URL as well.

“ ”

Note: The Redirect URI can be found in the Click information of the collector source configuration.

“ ”

- Click Continue.
- Go to Scopes and click Add Scopes.
- Add the following scopes to the application and click Done:
 - `team_chat:read:list_channel_activity_logs:admin`
 - `team_chat:read:list_channel_activity_logs:admin`
 - `team_chat:read:list_user_channels:admin`
 - `team_chat:read:list_members:admin`
 - `user:read:user:admin`
 - `user:read:list_users:admin`
 - `report:read:chat_session:admin`
 - `report:read:list_chat_sessions:admin`
- Click Done.

Source Configuration

To configure the collector:

- Enter Client ID in the Application ID field.
- Enter Client Secret in the Application Secret/Key field. Click NEXT.

CONFIGURATION WIZARD

SOURCE MONITORED USERS FILTERS TARGETS SETTINGS

Please provide the following credentials to your company's Zoom Chat app so that Arctera Insight Capture can be configured to access your monitored users' account data.

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

ZOOM CHAT APPLICATION CONFIGURATION

Application ID

Application secret/key

I have access token

NEXT

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

Timestamp Formatting

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 Date Time Format drop-down list.

TIME STAMP FORMATTING

Primary time zone

(UTC-08:00) Pacific Time (US & Canada) (PST) Secondary time zone

Date time format

*March 29 at 09:31 PM***Advanced Configuration Options**

To configure the advanced options:

1. Specify the Subject Prefix in the subject line of imported emails. This feature allows organizing imported data when multiple sources share a common target.

“ ”


Note: Not applicable to the EV Folder target.


“ ”

2. Specify Do not download data modified before and Do not download data modified after to allow cutting off data outside the set date range. If the before date is set to 08/17/2022 and the after date is set to 08/25/2022, only the data between these two dates will be downloaded. Data outside that time frame will be ignored. Note that both options can be used independently as well.

ADVANCED CONFIGURATION OPTIONS

Subject prefix

Do not download data modified before:
 

Do not download data modified after:
 

Threading Options

Enable one of the following options:

- No threading - If selected, only a single message will be generated for a message in the chat/channel.
- Message with replies - If selected, chat/channel messages with all their replies will be generated.
- Per conversation - If selected, chat/channel messages per conversation will be generated.

THREADING OPTIONS

No threading

Message with replies

Per conversation

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 Custom Message field, a text for those excluded files can be specified. E.g., "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.

ATTACHMENTS CONFIGURATION

Do not download files greater than megabyte(s).

Custom message

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.

File types

Custom message

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.

Next Steps

After setting up the collector, follow the links below to continue with the configuration of:

- [Monitored Users](#)
- [Filters](#)
- [Targets](#)
- [Importer Settings](#)

Zoom Meetings

Zoom is the leader in modern enterprise video communications, with an easy, reliable cloud platform for video and audio conferencing, chat, and webinars.



Note: The Zoom account used for the Zoom collector needs to be on Business or Enterprise plan to gain access to the API. Note that Pro plan is not supported.



Activities Captured

- Meeting metadata
- Meeting recording files:
 - Audio and video
 - Audio
 - Audio transcripts
- Meeting chats
 - Messages
 - Replies
 - Emojis

Notes

- Only meetings from the last 6 months can be captured. The option to select a longer cut-off date in the Arctera Insight Capture UI, has also been disabled.
- Zoom does not support IP addresses as call back URLs.
- To capture the content, the meetings should be recorded. This applies to chats during meetings too. To enable automatic recording, go to [My Settings - Zoom](#) > General > Automatic recording.
- If a message was sent privately to one of the meeting participants, it is not added to the recording file, as the Zoom API does not provide that option. We recommend disabling the meeting chat direct messages from [Account Settings - Zoom](#) > In Meeting (Basic) > Meeting chat - Direct messages to be SEC-compliant.
- Attachments sent during a meeting are not captured. To prevent data loss, the option to send files via meeting chat should be disabled from from [Account Settings - Zoom](#) > In Meeting (Basic) > Send files via meeting chat.
- In addition, the following features should be disabled for the hosts:
 - General > Host can pause/stop the auto recording in the cloud

- General > The host can delete cloud recordings
- Notification > Delete cloud recordings and transcripts after a specified number of days

Creating a Zoom OAuth App

To create an OAuth application:

1. Login to Zoom Marketplace in case of using Zoom Commercial.

OR,

1. Login to [Zoom for Government](#) in case of using Zoom for Government.
2. Select Develop > Build App.
3. Select General App and click Create.
4. A Client ID and Client secret will be generated. Use these credentials to configure the collector.
5. On the Basic Information page, under Select how the app is managed, choose Admin-managed and click Save.
6. Under OAuth Information add the URL of your local environment in the following format: `https://<your_instance>/Configuration/OAuthCallback` to the OAuth Redirect URL. Ensure that OAuth Allow lists field is filled with the same URL as well.

“ ”

Note: The Redirect URI can be found in the Click information of the collector source configuration.

“ ”

7. Click Continue.
8. Go to Scopes and click Add Scopes.
 - meeting:read:list_past_participants:admin
 - meeting:read:list_poll_results:admin
 - archiving:read:archive_files:admin
 - archiving:read:list_archived_files:admin
 - user:read:user:admin user:read:list_users:admin

- webinar:read:list_past_polls:admin
- webinar:read:list_past_participants:admin

9. Click Done.

Source Configuration

To configure the collector:

1. Enable Zoom Commercial or Zoom for Government and use the respective credentials of the applications.
2. Enter Client ID in the Application ID field.
3. Enter Client Secret in the Application Secret/Key field. Click NEXT.

CONFIGURATION WIZARD

SOURCE | MONITORED USERS | FILTERS | TARGETS | SETTINGS

Please provide the following credentials to your company's Zoom Meetings app so that Arctera Insight Capture can be configured to access your monitored users' account data.

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

ZOOM MEETINGS APPLICATION CONFIGURATION

Zoom Commercial | Zoom for Government

Application ID

Application secret/key

I have access token

NEXT

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

Timestamp Formatting

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 Date Time Format drop-down list.

TIME STAMP FORMATTING

Primary time zone

(UTC-08:00) Pacific Time (US & Canada) (PST) ▼

Secondary time zone

▼

Date time format

March 29 at 09:31 PM ▼

Meeting File Download Options

This section includes the following:

- 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 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 specifies how the transcript file is added to the imported message in the body of the message or attached to the message as a separate file.
- Meeting Recordings specifies whether video with audio or only audio is included in the imported message.

MEETING FILE DOWNLOAD OPTIONS

Do not download files greater than megabyte(s).

INCLUDE CHAT FILE

In the body

As attachment

INCLUDE TRANSCRIPT FILE

In the body

As attachment

MEETING RECORDINGS

Video with audio

Audio only

Advanced Configuration Options

To configure advanced options:

1. Specify the Subject Prefix in the subject line of imported emails. This is useful for organizing imported data, i.e., when multiple sources share a common target.

“ ”



Note: Not applicable to the EV Folder target.

“ ”

2. Specify Do not download data modified before and Do not download data modified after to allow cutting off data outside the set date range. If the before date is set to 08/17/2024 and the after date is set to 08/25/2024, only the data between these two dates will be downloaded. Data outside that time frame will be ignored. Note that both options can be used independently as well.

ADVANCED CONFIGURATION OPTIONS

Subject prefix

 Do not download data modified before:
 
 Do not download data modified after:
 

Next Steps

After setting up the collector, follow the links below to continue with the configuration of:

- [Monitored Users](#)
- [Filters](#)
- [Targets](#)
- [Importer Settings](#)

Zoom Meetings Chats

Zoom is the leader in modern enterprise video communications, with an easy, reliable cloud platform for video and audio conferencing, chat, and webinars.

Zoom's Meeting and Webinar Archiving solution allows account administrators to set up an automated mechanism to collect and archive meeting data to a 3rd party platform of their choice and hence, satisfy FINRA and/ or other compliance requirements. Only account administrators can manage what data is archived, what is displayed in the disclaimer, and enable archiving for specific groups as well. Arctera Insight Capture uses this API to retrieve archived meeting or webinar chats.

“ ”

Note: The Zoom account used for the Zoom collector needs to be on the Business or Enterprise plan to gain access to the API. Note that the Pro plan is not supported. **Note:** The Meeting Archiving feature is enabled for your account by Zoom Support.



Activities Captured

- Webinar/Meeting metadata
- Webinar/Meeting chats
- Polls in chats

Notes

- The maximum number of days of archiving is up to 60 days. The number of days can be specified from [Account Settings - Zoom](#) > In Meeting (Advanced) > Set the retention for archiving content.
- Attachments sent during a meeting are not captured. To prevent data loss, the option to send files via meeting chat should be disabled from the [Account Settings - Zoom](#) > In Meeting (Basic) > Send files via meeting chat.
- In addition, the following features should be disabled for the hosts:
 - General > Host can pause/stop the auto recording in the cloud
 - General > The host can delete cloud recordings
 - Notification > Delete cloud recordings and transcripts after a specified number of days

Creating a Zoom OAuth App

To create an OAuth application:

1. Login to Zoom Marketplace in case of using Zoom Commercial.

OR,

1. Login to [Zoom for Government](#) in case of using Zoom for Government.
2. Select Develop > Build App.
3. Select General App and click Create.
4. A Client ID and Client secret will be generated. Use these credentials to configure the collector.
5. On the Basic Information page, under Select how the app is managed, choose Admin-managed and click Save.

- Under OAuth Information add the URL of your local environment in the following format: `https://<your_instance>/Configuration/OAuthCallback` to the OAuth Redirect URL. Ensure that OAuth Allow lists field is filled with the same URL as well.

“ ”

Note: The Redirect URI can be found in the Click information of the collector source configuration.

“ ”

- Click Continue.
- Go to Scopes and click Add Scopes.
 - meeting:read:list_past_participants:admin
 - meeting:read:list_poll_results:admin
 - archiving:read:archive_files:admin
 - archiving:read:list_archived_files:admin
 - user:read:user:admin user:read:list_users:admin
 - webinar:read:list_past_polls:admin
 - webinar:read:list_past_participants:admin
- Click Done.

Source Configuration

To configure the collector:

- Enter Client ID in the Application ID field.
- Enter Client Secret in the Application Secret/Key field. Click NEXT.

CONFIGURATION WIZARD ×

- SOURCE**
- MONITORED USERS
- FILTERS
- TARGETS
- SETTINGS

Please provide the following credentials to your company's Zoom Meetings Chats app so that Arctera Insight Capture can be configured to access your monitored users' account data.

If you do not have an app created for Zoom Meetings Chats, please [click](#) for more information.

ZOOM MEETINGS CHATS APPLICATION CONFIGURATION

Application ID

Application secret/key

I have access token

NEXT

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

Timestamp Formatting

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 Date Time Format drop-down list.

TIME STAMP FORMATTING

Primary time zone

(UTC-08:00) Pacific Time (US & Canada) (PST) Secondary time zone

Date time format

*March 29 at 09:31 PM***Advanced Configuration Options**

To configure advanced options:

1. Specify the Subject Prefix in the subject line of imported emails. This is useful for organizing imported data, i.e., when multiple sources share a common target.

“ ”



Note: Not applicable to the EV Folder target.

“ ”

2. Specify Do not download data modified before and Do not download data modified after to allow cutting off data outside the set date range. If the before date is set to 08/17/2023 and the after date is set to 08/25/2023, only the data between these two dates will be downloaded. Data outside that time frame will be ignored. Note that both options can be used independently as well.

ADVANCED CONFIGURATION OPTIONS

Subject prefix

 Do not download data modified before:
 
 Do not download data modified after:
 

Next Steps

After setting up the collector, follow the links below to continue with the configuration of:

- [Monitored Users](#)
- [Filters](#)
- [Targets](#)
- [Importer Settings](#)

Zoom Meetings via Archiving API

Zoom is the leader in modern enterprise video communications, with an easy, reliable cloud platform for video and audio conferencing, chat, and webinars.

Zoom's Meeting and Webinar Archiving solution allows account administrators to set up an automated mechanism to collect and archive meeting data to a 3rd party platform of their choice and hence, satisfy FINRA and/ or other compliance requirements. Only account administrators can manage what data is archived, what is displayed in the disclaimer, and enable archiving for specific groups as well.

Arctera Insight Capture uses this API to retrieve archived meeting or webinar files of an account.



Note: The Meeting Archiving feature is enabled for your account by Zoom Support. **Note:** The Zoom account used for the Zoom collector needs to be on the Business or Enterprise plan to gain access to the API. Note that the Pro plan is not supported.

“ ”

Activities Captured

- Webinars/Meeting metadata
- Webinars/Meeting recording files:
 - Audio and video
 - Audio
 - Closed captions (only if the option is enabled by the user from the Zoom Settings)
- Webinars/Meeting chats
- Recording files as attachments

“ ”

Note: A token should be added to download files with the download URLs.

“ ”

- Polls in chats

Notes

- The maximum number of days of archiving is up to 60 days. The number of days can be specified from [Account Settings - Zoom](#) > In Meeting (Advanced) > Set the retention for archiving content.
- Attachments sent during a meeting are not captured. To prevent data loss, the option to send files via meeting chat should be disabled from the [Account Settings - Zoom](#) > In Meeting (Basic) > Send files via meeting chat.
- In addition, the following features should be disabled for the hosts:
 - General > Host can pause/stop the auto recording in the cloud

- General > The host can delete cloud recordings
- Notification > Delete cloud recordings and transcripts after a specified number of days

Creating a Zoom OAuth App

To create an OAuth application:

1. Login to Zoom Marketplace in case of using Zoom Commercial.

OR,

1. Login to [Zoom for Government](#) in case of using Zoom for Government.
2. Select Develop > Build App.
3. Select General App and click Create.
4. A Client ID and Client secret will be generated. Use these credentials to configure the collector.
5. On the Basic Information page, under Select how the app is managed, choose Admin-managed and click Save.
6. Under OAuth Information add the URL of your local environment in the following format: `https://<your_instance>/Configuration/OAuthCallback` to the OAuth Redirect URL. Ensure that OAuth Allow lists field is filled with the same URL as well.

“ ”

Note: The Redirect URI can be found in the Click information of the collector source configuration.

“ ”

7. Click Continue.
8. Go to Scopes and click Add Scopes.
 - meeting:read:list_past_participants:admin
 - meeting:read:list_poll_results:admin
 - archiving:read:archive_files:admin
 - archiving:read:list_archived_files:admin
 - user:read:user:admin user:read:list_users:admin

- webinar:read:list_past_polls:admin
- webinar:read:list_past_participants:admin

9. Click Done.

Source Configuration

To configure the collector:

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

The screenshot shows a 'CONFIGURATION WIZARD' dialog box with a close button (X) in the top right corner. The 'SOURCE' tab is selected, with other tabs being 'MONITORED USERS', 'FILTERS', 'TARGETS', and 'SETTINGS'. Below the tabs, there is instructional text: 'Please provide the following credentials to your company's Zoom Meetings via Archiving API app so that Arctera Insight Capture can be configured to access your monitored users' account data.' and 'If you do not have an app created for Zoom Meetings via Archiving API, please [click](#) for more information.' The main content area is titled 'ZOOM MEETINGS VIA ARCHIVING API APPLICATION CONFIGURATION' and contains two input fields: 'Application ID' and 'Application secret/key'. Below these fields is a checkbox labeled 'I have access token'. A dark blue 'NEXT' button is located at the bottom right of the dialog box.

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

Timestamp Formatting

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 Date Time Format drop-down list.

TIME STAMP FORMATTING

Primary time zone
(UTC-08:00) Pacific Time (US & Canada) (PST)

Secondary time zone

Date time format
March 29 at 09:31 PM

Meeting File Download Options

This section includes the following:

- 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. 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.
- The 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 Closed Captions File option specifies how the closed captions are 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.

MEETING FILE DOWNLOAD OPTIONS

Do not download files greater than megabyte(s).

Custom message

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.

INCLUDE CHAT FILE

In the body

As attachment

INCLUDE CLOSED CAPTIONS FILE

In the body

As attachment

MEETING RECORDINGS

Video with audio

Audio only

Advanced Configuration Options

To configure advanced options:

1. Specify the Subject Prefix in the subject line of imported emails. This is useful for organizing imported data, i.e., when multiple sources share a common target.

“ ”

Note: Not applicable to the EV Folder target.


“ ”


2. Specify Do not download data modified before and Do not download data modified after to allow cutting off data outside the set date range. If the before date is set to 08/17/2024 and the after date is set to 08/25/2024, only the data between these two dates will be downloaded.

Data outside that time frame will be ignored. Note that both options can be used independently as well.

ADVANCED CONFIGURATION OPTIONS

Subject prefix

Do not download data modified before:
 

Do not download data modified after:
 

Next Steps

After setting up the collector, follow the links below to continue with the configuration of:

- [Monitored Users](#)
- [Filters](#)
- [Targets](#)
- [Importer Settings](#)

Zoom Phone

Zoom Phone is a cloud-based telephony solution integrated into the Zoom collaboration ecosystem, offering enterprise-grade voice communication through VoIP. It supports features such as call routing, voicemail, call recording, SMS, and integrations with contact centers and CRM platforms. The Zoom Phone collector focuses on capturing SMS messages, enabling secure ingestion of text communications for archiving, compliance, and oversight.

“ ”

Note: To use the collector, the Zoom account must be on a Business, Business Plus, or Enterprise plan; Pro plan access is not supported.

“ ”

Activities Captured

“ ”

Note: As long as Zoom Phone's SMS/MMS features remain enabled on the user's side, activities will be captured.

“ ”

- One-on-one SMS/MMS messages
- Group SMS/MMS messages

Captured activities can contain:

- Emojis
- GIFs
- Attachments

“ ”

Note: The capture includes data from the past six months, which is the timeframe made available through the API.

“ ”

Creating a Zoom OAuth App

To create an OAuth application:

1. Sign in to Zoom Marketplace.
2. Select Develop > Build App.
3. Select General App and click Create.
4. A Client ID and Client secret will be generated. Use these credentials to configure the collector.

5. On the Basic Information page, under Select how the app is managed, choose Admin-managed and click Save.
6. Give an app name, choose Account-level app, disable Publishing to Marketplace and click Create.
7. Copy the Client ID and the Client Secret. They will be used later to configure the Zoom collector.
8. Under OAuth Information add the URL of your local environment in the following format: `https://<your_instance>/Configuration/OAuthCallback` to the OAuth Redirect URL. Ensure that OAuth Allow lists field is filled with the same URL as well.



Note: The Redirect URI can be found in the Click information of the collector source configuration.



9. Click Continue.
10. Go to Scopes and click Add Scopes.
11. Add the following scopes to the application and click Done:
 - `phone:read:user:admin`
 - `phone:read:list_users:admin`
 - `phone:read:sms_message:admin`
 - `phone:read:sms_session:admin`
 - `phone:read:list_sms_sessions:admin`
12. Click Done.

Source Configuration

To configure the collector:

1. Enter the saved Client ID in the Application ID field and the Client Secret in the Application secret/key field. Then, click NEXT to continue.

2. A pop-up window will open (ensure that the pop-ups are not disabled in the browser window). Click Allow to let the app access the specified resources for all users in the organization.

CONFIGURATION WIZARD ×

- SOURCE**
- MONITORED USERS
- TARGETS
- SETTINGS

Please provide the following credentials to your company's Zoom Phone app so that Arctera Insight Capture can be configured to access your monitored users' account data.

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

ZOOM PHONE APPLICATION CONFIGURATION

Application ID

Application secret/key

I have access token

NEXT

Timestamp Formatting

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 Date Time Format drop-down list.

TIME STAMP FORMATTING

Primary time zone

(UTC-08:00) Pacific Time (US & Canada) (PST) Secondary time zone

Date time format

*March 29 at 09:31 PM***Advanced Configuration Options**

To configure advanced options:

1. Specify the Subject Prefix in the subject line of imported emails. This is useful for organizing imported data, i.e., when multiple sources share a common target.

“ ”

Note: Not applicable to the EV Folder target.

“ ”

2. Specify Do not download data modified before and Do not download data modified after to allow cutting off data outside the set date range. If the before date is set to 08/17/2024 and the after date is set to 08/25/2024, only the data between these two dates will be downloaded. Data outside that time frame will be ignored. Note that both options can be used independently as well.

ADVANCED CONFIGURATION OPTIONS

Subject prefix

Do not download data modified before:

Do not download data modified after:

Threading Options

Enable one of the following options:

- No threading: If selected, only a single SMS/MMS message will be generated for a message in the group.
- Per conversation: If selected, group SMS/MMS messages per conversation will be generated.

THREADING OPTIONS

No threading

Per conversation

Attachments Configuration

- Include original data as attachment: If checked, the message original data is attached to the output file.



Note: Not applicable to the EV Folder target.



- Ignore attachments: If checked, all the attachments are excluded from the message enhancing the collector performance. Each message will contain info and the link to the excluded attachment.
- 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 Custom Message field, a text for those excluded files can be specified. E.g., "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.

ATTACHMENTS CONFIGURATION

Include original data as attachment

Ignore attachments

Do not download files greater than megabyte(s).

Custom message

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.

File types

Custom message

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.

Next Steps

After setting up the collector, follow the links below to continue with the configuration of:

- [Monitored Users](#)

- Filters
- Targets
- Importer Settings

MONITORED USERS

This section includes the following topics:

- [Monitored Users](#)
- [All \(Based on Native API\)](#)
- [Manually Maintain the List](#)
- [Microsoft Entra ID](#)
- [Monitored Users for Twitter](#)
- [Monitored Users \(N/A\)](#)

Monitored Users

Monitored Users are individuals whose data is collected by Arctera Insight Capture. There are the following User Sources from where Monitored Users can be added to the collector:

User Sources

1. All (based on native API)
2. Manually maintain the list
3. Microsoft Entra ID

All (Based on Native API)

This option automatically imports the users of the collector using its API. This works for sources that are connected to Arctera Insight Capture by the API, like Slack eDiscovery, Zoom Meetings and Microsoft Teams, and so on.

CONFIGURATION WIZARD
✕

SOURCE

MONITORED USERS

FILTERS

TARGETS

SETTINGS

ACCOUNT FILTER

USER SOURCE CONFIGURATION

All (based on native API) ▼

FILTER TYPE CONFIGURATION

Include

Exclude

CSV File SELECT

CSV File SELECT

Preview and confirm monitored user entries.

+
UPLOAD CSV
UPDATE MU LIST
DELETE SELECTED
SYNC

SEARCH

		CORP EMAIL ADDRESS	DISPLAY NAME	MONITOR	ZOOM MEETINGS VIA ARCH
<input type="checkbox"/>				<input checked="" type="checkbox"/>	
<input type="checkbox"/>				<input checked="" type="checkbox"/>	
<input type="checkbox"/>				<input checked="" type="checkbox"/>	
<input type="checkbox"/>				<input checked="" type="checkbox"/>	
<input type="checkbox"/>				<input checked="" type="checkbox"/>	

<< | < 1 > | >>

1 - 5 of 5 items

BACK
NEXT

The following options are available:

- Include is used for uploading a CSV file with a list of users that have not been retrieved via API but should be included in the Monitored Users.
- Exclude is used for uploading a CSV file with the users that should not be monitored.

When the monitored users' source type+ is set to All (Based on native API), the Sync button is available for the following collectors:

- Viva Engage (Yammer)
- Slack eDiscovery

- Chatter
- Chatter Cipher Cloud
- Microsoft Teams via Export API
- SharePoint
- Workplace from Facebook
- Dropbox Business
- OneDrive for Business
- Exchange Graph API
- Citrix Workspace & ShareFile
- Dropbox Business
- Google Drive
- Jabber
- RingCentral
- Skype for Business
- ServiceNow
- Zoom Meetings Chats
- Zoom Chat
- Cisco Webex Teams
- Zoom Meetings
- Zoom Meetings via Archiving API

“ ”

Note: To display the Sync button for the last 12 collectors in the list, the Delete data action is required.

“ ”

Manually Maintain the List

This option allows manually managing users.

CONFIGURATION WIZARD ×

SOURCE **MONITORED USERS** **FILTERS** **TARGETS** **SETTINGS**

ACCOUNT FILTER

USER SOURCE CONFIGURATION

Manually maintain the list ▼

Preview and confirm monitored user entries.

+ **UPLOAD CSV** **UPDATE MU LIST** **DELETE SELECTED** **SYNC** **SEARCH**

<input type="checkbox"/>	CORP EMAIL ADDRESS	DISPLAY NAME	<input type="checkbox"/>	MONITOR	ZOOM MEETINGS VIA ARCP
<input type="checkbox"/>			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<input type="checkbox"/>			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<input type="checkbox"/>			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<input type="checkbox"/>			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<input type="checkbox"/>			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

« | < 1 > | » 1 - 5 of 5 items

BACK **NEXT**

After selecting Manually maintain the list from User Source Configuration, the below list of monitored list will become active.

To configure Manually Maintain the List:

- +(Add monitored user) opens a window where you can add details of a user to be monitored and fill in the required information. The same information can later be edited by clicking Edit Monitored User as described in point 8.
 - Corp Email Address is a required field for the corporate email address of the user.
 - Display Name is the name that will be displayed in the Monitored Users list.
 - Collector Email/ID is for the email or id of the user's Collector account.
 - If Monitor this user checked monitors the user and vice versa.
- Upload CSV allows uploading a Monitored users' list as a CSV.


3. Update MU list allows updating the already selected list of monitored users.
4. Delete Selected removes selected users from the monitored list.
5. Sync allows synchronizing with the current data.
6. Search in the list of existing users.
7. Select the user and click Delete Selected. This will remove selected Monitored Users' list.
8. Edit the information about an existing user.
9. If Monitor is checked, the user is monitored, if not, the user is not monitored.


Microsoft Entra ID

This option automatically imports the users from the Microsoft Entra ID. By expanding Microsoft Entra ID Configuration, the following screen opens.

ACCOUNT FILTER

USER SOURCE CONFIGURATION

Microsoft Entra ID 


MICROSOFT ENTRA ID CONFIGURATION 

Directory ID

Application ID

X.509 Certificate file

X.509 Certificate password

User Mapping Property 

Get all users






FILTER TYPE CONFIGURATION

Include

Exclude

CSV File

Preview and confirm monitored user entries.

<input type="checkbox"/>		CORP EMAIL ADDRESS	DISPLAY NAME	<input type="checkbox"/> MONITOR	ZOOM MEETINGS VIA ARCH
<input type="checkbox"/>		Defect	P3	<input checked="" type="checkbox"/>	
<input type="checkbox"/>		Enhancement	P2	<input checked="" type="checkbox"/>	
<input type="checkbox"/>		Issue Type	Priority	<input checked="" type="checkbox"/>	
<input type="checkbox"/>		Request	P2	<input checked="" type="checkbox"/>	
<input type="checkbox"/>		Story	P2	<input checked="" type="checkbox"/>	

To configure the section:

1. Specify Application ID and Directory ID. For more details on how to create an app in Microsoft Entra ID and grant the permissions, see [Microsoft Entra ID App Creation](#) and [Microsoft Entra ID App Permissions](#) accordingly.
2. Activate Upload file (*.pfx), click the Select button to upload the certificate and then provide X.509 Certificate Password.

3. Select User Mapping Property form the drop-down list. Note that User Principal Name always exists.

“ ”

Note: Only for the users that have the respective field.

“ ”

4. Enable Get all users checkbox to process all users in a tenant or provide a group name to process only the specific group.

“ ”

Note: Both Security and Office 365 group are supported including Nested Groups.

“ ”

The following Filter Type Configurations are available:

- Include is used for uploading a CSV file with a list of users that have not been retrieved via API but should be included in the Monitored Users.
- Exclude is used for uploading a CSV file with the users that should not be monitored.

Microsoft Entra ID App Creation

To authenticate via OAuth during the collector configuration, you need to create a Microsoft Entra ID Application.

To create an app:

1. Create an O365 account and open [Azure Portal](#) using the same credentials as for O365 (Global Admin).
2. Click Microsoft Entra ID at the top of the page and select App Registration from the left-side navigation pane.
3. Click the +New registration button.
4. Enter a Name for the application and click Register.

5. Find and make a note your Application (client) ID and Directory (tenant) ID as this is needed for configuring the collector in Arctera Insight Capture.

Microsoft Entra ID Permissions

For permissions:

1. In the navigation pane to the left, click API permissions.
2. Click Microsoft Graph, and in the opened pane select Application permissions.
3. Add the following permissions:
 - GroupMember.Read.All
 - User.Read.All
4. Grant all the above-mentioned permissions.

Monitored Users for Twitter

Here the user can add, edit, and delete the listed monitored users or browse among them by searching the users.

To configure the section:

1. When \+ (Add Monitored User Manually) is chosen, the following pop-up opens, where Corporate email address (email address of the Monitored User), Display name and the Screen name of the user should be entered.

CONFIGURATION WIZARD
✕

SOURCE
MONITORED USERS
FILTERS
TARGETS
SETTINGS

Preview and confirm monitored user entries.

+
UPLOAD CSV
DELETE SELECTED
SYNC

SEARCH

		CORP EMAIL ADDRESS	DISPLAY NAME	SCREEN NAME
<input type="checkbox"/>				
<input type="checkbox"/>				
<input type="checkbox"/>				
<input type="checkbox"/>				
<input type="checkbox"/>				

<< | < | 1 | > | >>

1 - 5 of 5 items

Now that you have told us where to gather your data, tell us how you want Alta Capture to map users.

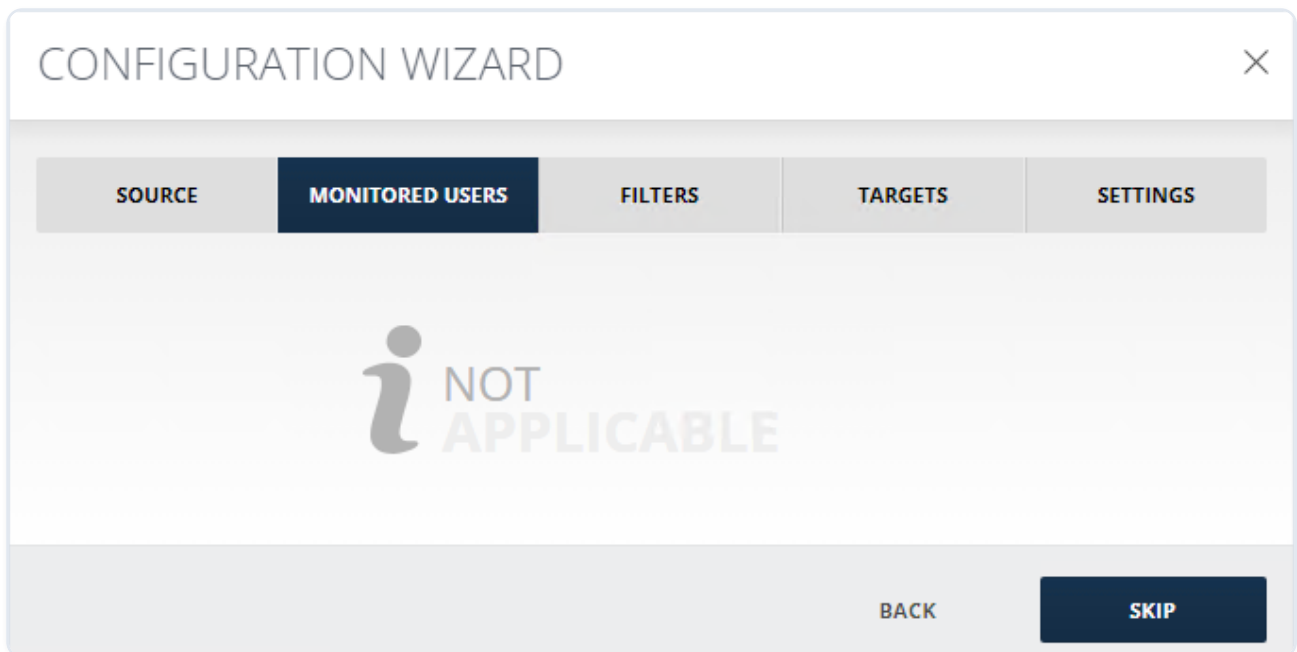
BACK
NEXT

2. Click Upload CSV for uploading the Monitored users' list as a CSV.
3. Click Delete selected for deleting the below selected list of monitored users.
4. Click SAVE CHANGES or CLOSE.

Monitored Users (N/A)

Some of the collectors do not have users, therefore instead of seeing the user configuration options under the Monitored Users tab, you will see the following screen:

If you click SKIP, you will be redirected to the Filters tab.



Here is the list of collectors for which Monitored Users is not applicable:

- Amazon S3
- Audio Video
- Bloomberg
- BlackBerry
- CellTrust
- Dubber Speik Recordings
- Dubber Speik SMS
- EML
- FX Connect
- IceChat
- iMessage
- JSON
- Microsoft Teams for Audio and Video
- NTR-X
- Redtail Speak
- Symphony
- Text-Delimited
- LSEG (Refinitiv)

- Yieldbroker
- Pivot
- UBS
- Verba
- Verint
- WhatsApp
- Webpage Capture
- XSLT/XML
- XIP
- YouTube

FILTERS

This section includes the following topics:

- [Filters](#)
- [Keyword Filter](#)
- [Mail Filter](#)
- [Message Size Filter](#)
- [Participants Count Filter](#)
- [Time Stamp Filter](#)
- [XML Filter](#)

Filters

Filters are used to filter or separate data according to content. They can be configured to match specific email addresses, XML tags with specific values, or other information using LDAP queries.

Filters

1. [Keyword Filter](#)
2. [Mail Filter](#)
3. [XML Filter](#)
4. [Message Size Filter](#)
5. [Time Stamp Filter](#)
6. [Participants Count Filter](#)

To configure the filters:

1. Click Add Filter.

CONFIGURATION WIZARD

SOURCE MONITORED USERS **FILTERS** TARGETS SETTINGS

Configure any needed data filters here.

+ **ADD FILTER**

BACK **SKIP**

2. Enter Filter Name and select Filter Type.

CONFIGURATION WIZARD

SOURCE MONITORED USERS **FILTERS** TARGETS SETTINGS

NEW FILTER

Filter name *

Filter type * ▼

BACK **ADD**

Keyword Filter

Keyword filter allows you to retrieve and refine the data by mentioned keywords and collect it in the specified target.

CONFIGURATION WIZARD ✕

SOURCE
MONITORED USERS
FILTERS
TARGETS
SETTINGS

Keyword Filter Configuration

Filter name *

Filter type

Keywords * (Comma separated)

Case sensitive

FILTER BASED ON THE FOLLOWING FIELD(S)

<input checked="" type="checkbox"/> From	<input checked="" type="checkbox"/> To
<input checked="" type="checkbox"/> CC	<input checked="" type="checkbox"/> BCC
<input checked="" type="checkbox"/> Body	<input checked="" type="checkbox"/> Subject
<input checked="" type="checkbox"/> CustomHeader	

BACK
NEXT

To configure the filter:

1. In the Keywords (Comma separated) field, the keywords, by which the data will be filtered, should be added. The keywords need to be separated by commas for the filtering to work. Keywords are searched for in the body of the message, as well as in its subject.
2. If Case Sensitive option is checked, only the words with the same case sensitivity as the input keyword will be filtered. E.g., if you input Direct, it will filter only messages with Direct in their subjects and/or bodies, the results with direct or DIRECT will not be filtered.
3. Filter can be done being based on the following field(s):
 - From
 - CC
 - Body
 - To
 - BCC

- Subject
- Custom Header

Mail Filter

Using Mail Filter, you can send the imported data to different targets based on the email addresses in the TO, FROM, CC, and BCC fields of the imported messages, depending on the fields you specify in the filter settings. The mail filtering in Arctera Insight Capture can be static and dynamic.

Static Filter allows uploading a CSV file with email addresses that will be used for filtering. Click Add from CSV to browse for the necessary list for filtering. The CSV file should include only email addresses that should be used for filtering.

CONFIGURATION WIZARD
✕

SOURCE
MONITORED USERS
FILTERS
TARGETS
SETTINGS

Mail filter configuration

Filter name *

Filter type

FILTER TYPE

Static Dynamic

E-mail

+

ADD FROM CSV

REMOVE ALL

FILTER BASED ON THE FOLLOWING FIELD(S)

From To

CC BCC

BACK

NEXT

Dynamic Filter is used to specify email addresses dynamically from Entra ID. This means, that if any changes are applied to the user list in the server or in the CSV file, the filter settings are refreshed, and values are retrieved newly each time the Importer is run.

CONFIGURATION WIZARD

SOURCE MONITORED USERS **FILTERS** TARGETS SETTINGS

Mail filter configuration

Filter name * Filter type

FILTER TYPE

Static Dynamic Microsoft Entra ID

MICROSOFT ENTRA ID PROPERTIES

Directory ID

Application ID

X.509 Certificate file

X.509 Certificate password

User Mapping Property

Get all users

TEST SEARCH RESULT

FILTER BASED ON THE FOLLOWING FIELD(S)

From To

CC BCC

To configure the Microsoft Entra ID section:

1. Specify Application ID and Directory ID. For more details on how to create an app in Microsoft Entra and grant the permissions, see [Microsoft Entra App Creation](#) and [Microsoft Entra App Permissions](#) below.
2. Click the Select button to upload the certificate and provide X.509 Certificate Password.
3. Select User Mapping Property form the drop-down list.

“ ”

Note: User Principal Namealways exists.

“ ”

4. Enable Get all users checkbox to get all users.

Microsoft Entra ID App Creation

To authenticate via OAuth during the collector configuration, you need to create a Microsoft Entra Application.

To create an app:

1. Create an O365 account and open [Azure Portal](#) using the same credentials as for O365 (Global Admin).
2. Click Microsoft Entra ID at the top of the page and select App Registration from the left-side navigation pane.
3. Click the +New registration button.
4. Enter a Name for the application and click Register.
5. Find and make a note your Application (client) ID and Directory(tenant) ID as this is needed for configuring the collector in Arctera Insight Capture.
6. In the navigation pane to the left, go to Certificates & secrets.
7. Click the Upload certificate button.
8. Select a certificate (public key) with one of the following file types: .cer,.pem, .crt, and click Add. For more information on how to create a certificate, see [Creating a Certificate \(Private and Public Keys\)](#).

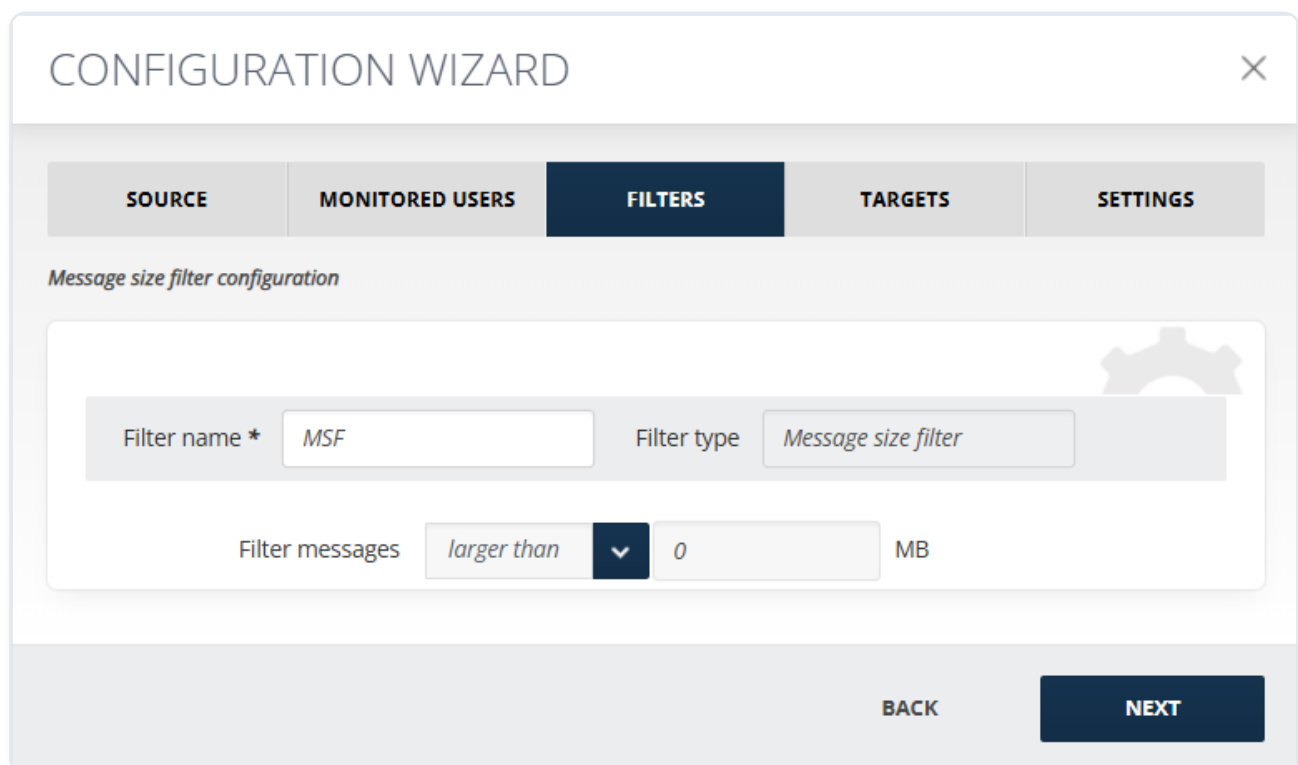
Microsoft Entra ID App Permissions

For permissions:

1. In the navigation pane to the left, click API permissions.
2. Click Microsoft Graph, and in the opened pane select Application permissions.
3. Add the following permissions:
 - Group.Read.All
 - User.Read.All
4. Click the Yes button to grant consent, or No to discard changes.
5. Grant all the above-mentioned permissions.

Message Size Filter

This allows filtering messages to a different target based on their size.



The screenshot shows a 'CONFIGURATION WIZARD' window with a close button (X) in the top right corner. The wizard has five tabs: SOURCE, MONITORED USERS, FILTERS (selected), TARGETS, and SETTINGS. Below the tabs, the title 'Message size filter configuration' is displayed. The main configuration area contains a gear icon in the top right. There are two rows of input fields. The first row has 'Filter name *' with the value 'MSF' and 'Filter type' with the value 'Message size filter'. The second row has 'Filter messages' with a dropdown menu showing 'larger than' and a text input field with the value '0', followed by 'MB'. At the bottom right, there are two buttons: 'BACK' and 'NEXT'.

In the Filter messages larger than/smaller than _ MB, larger than or smaller than should be selected and the size of messages should be entered:

- If larger than is selected and the size of messages is entered, the messages that exceed that size will be filtered.

- If smaller than is selected and the size of messages is entered, the messages that are smaller than that size will be filtered.

Participants Count Filter

This allows filtering messages based on the number of participants.

The screenshot shows a 'CONFIGURATION WIZARD' window with a close button (X) in the top right corner. Below the title bar are five tabs: SOURCE, MONITORED USERS, FILTERS (selected), TARGETS, and SETTINGS. The main content area is titled 'Participants count filter configuration' and contains a gear icon in the top right. The configuration includes:

- Filter name ***: A text input field containing 'PC'.
- Filter type**: A dropdown menu showing 'Participants count filter'.
- FILTER BASED ON THE FOLLOWING FIELD(S)**: A section with four checkboxes:
 - FROM
 - TO
 - CC
 - BCC
- Match messages that have**: A dropdown menu showing 'less', followed by 'than' and a text input field containing '0', and 'participant(s)'.

At the bottom of the configuration area are two buttons: 'BACK' and 'NEXT'.

The filter is configured based on the FROM, TO, CC, and BCC check boxes. Note that the FROM field is always marked as checked and is not editable.

Match messages that have _ than X participant(s) is used to filter messages that have more/less than the specified quantity of participants by choosing less or more from the drop-down list and inputting the needed quantity of participants.

Time Stamp Filter

Time Stamp filter allows filtering messages that are already constructed and ready to be sent based on the timestamp.

CONFIGURATION WIZARD ✕

SOURCE
MONITORED USERS
FILTERS
TARGETS
SETTINGS

Time stamp filter configuration

Filter name *

Filter type

Match messages that fall inside ▼ the range below.

Range start date: 📅

Range end date: 📅

BACK
NEXT

To configure the filter:

1. The Match messages that fall inside/outside the range below drop-down list allows you to include or exclude the specified period depending on the following cases:
 - In case both the Range start date and the Range end date are specified, and the inside option is selected from the drop-down list, then the content between that cut-off dates and the specified dates included, is filtered.
 - In case both the Range start date and the Range end date are specified, and the outside option is selected from the drop-down list, then the content before and after the specified dates, is filtered.
 - In case only the Range start date is specified, and the inside option is selected from the drop-down list, then the content after that specified start date and the specified start date included, is filtered.
 - In case only the Range start date is specified, and the outside option is selected from the drop-down list, then the content before that specified start date is filtered.

- In case only the Range end date is specified, and the inside option is selected from the drop-down list, then the content before that specified end date and the specified end date included, is filtered.
 - In case only the Range end date is specified, and the outside option is selected from the drop-down list, then the content after that specified end date is filtered.
2. The Range start date checkbox allows specifying a start date.
 3. The Range end date checkbox allows specifying an end date.

XML Filter

XML filter allows filtering through XML source data with tags and their specific values.

The screenshot shows the 'CONFIGURATION WIZARD' interface with the 'FILTERS' tab selected. The wizard is titled 'Xml filter configuration'. It features a navigation bar with tabs: SOURCE, MONITORED USERS, FILTERS (active), TARGETS, and SETTINGS. Below the navigation bar, the configuration fields are as follows:

- Filter name ***: A text input field containing 'XMLF'.
- Filter type**: A dropdown menu showing 'Xml filter'.
- ADD TAG AND VALUE**: A section with two input fields: 'Match Tag' and 'Tag Value'. To the right of these fields is a plus sign (+) button and an 'ADD FROM CSV' button.
- HEADER**: A section with two empty input fields. To the right of these fields is a 'REMOVE ALL' link.

At the bottom of the wizard, there are two buttons: 'BACK' and 'NEXT'.

To configure the filter:

1. In the Add Tag and Value field, an XML tag and corresponding to it value should be added. They will be searched for in the body of the message from XML Source and when matched, will be sent to the assigned target. You can add more than one XML tag and value. After adding one, click the activated Plus button.

2. If you do not want to input each tag and its value manually, upload a CSV file that includes tags and their values. Click Add from CSV, browse for the necessary file and upload it.
3. If the added tag and value are matched with a message, that message is sent to the corresponding target. In the Header section you can add a specific text to be added in the message header for facilitating future filtering. For example, you can add tags that match by country and if the tag is matched, the header can be "MessageOriginCountry - USA".

“ ”

Note: Only one header can be added to a single filter, so for each country, in this case, a separate filter needs to be created.

“ ”

This filter works only with XML sources:

- Bloomberg
- CellTrust
- Symphony
- XSLT/XML
- IceChat
- Pivot
- UBS

TARGETS

This section includes the following topics:

- [Targets](#)
- [Amazon S3 Target](#)
- [Azure Blob Target](#)
- [Direct SMTP Target](#)
- [EWS Server Target](#)
- [SFTP Target](#)
- [SMTP Target](#)
- [Google Vault Target](#)
- [EV Folder Target](#)

Targets

Here you can specify where you want to deliver your data.

“ ”

Note: Note that files and attachments, greater than 2 GB are not being processed.

“ ”

To set up targets:

1. Click Add Default Target. You will be redirected to the Targets screen.

CONFIGURATION WIZARD

SOURCE MONITORED USERS FILTERS **TARGETS** SETTINGS

Please specify where to deliver your data.

+ ADD DEFAULT TARGET

BACK SKIP

2. Fill in the Target Name and select Target Type from the drop-down menu.



Note: These are mandatory fields.



CONFIGURATION WIZARD

SOURCE MONITORED USERS FILTERS **TARGETS** SETTINGS

NEW TARGET

Target name *

Target type *

BACK ADD

3. When you have selected the exact target, you wish to configure click Next. There are the following types of targets:

- Amazon S3 \- Delivers data directly to the Amazon S3 storage.
- Azure Blob target \- Delivers data directly to the Azure Blob target.
- Direct SMTP target \- Delivers data to an SMTP server address directly from the server.
- EWS Server target \- Delivers data to an Exchange Web Services server.
- Failed target \- Lists all imports as failed delivery attempts.
- Google Vault target \- Delivers data to Google Vault.
- Ignored target\-\ Ignored target is used to mark all items sent to it as Ignored.
- SFTP target\-\ Allows delivering data to an FTP/SFTP server address.
- SMTP target \- Delivers data to an SMTP server address using a relay.

In addition to one default target, you can also have Alternative Targets. To make an Alternative target as the Default one next to the close button, you will see the Default button. Click it and your Alternative Target will become your default and it will be listed under the Alternative Targets.

CONFIGURATION WIZARD

SOURCE MONITORED USERS FILTERS **TARGETS** SETTINGS

Please specify where to deliver your data.

DEFAULT TARGET AW3

+ ADD ALTERNATIVE TARGET

BACK NEXT

Amazon S3 Target

To deliver data collected from different sources to the Amazon S3 storage, the storage should be configured accordingly.

AMAZON S3 CONNECTION

Access key *

Secret key *

Bucket name *

Region endpoint *

TEST CONNECTION

The following information is required:

- Access Key \- enter the access key which you can find in the Users > Security Credentials of your Amazon S3 account.
- Secret Key \- enter the secret key acquired while setting up the Security Credentials. Save it in a secure place as that secret key is provided only once.
- Bucket Name \- enter the archive bucket name.
- Region Endpoint \- enter the Region Endpoint which you can find in the Bucket Overview > Properties of your Amazon S3 bucket.

“ ”

Note: If Region Endpoint is not set correctly, the archive content will not be delivered.

“ ”

Objects	Properties	Permissions	Metrics	Management	Access points
Bucket overview					
Region US East (N. Virginia) us-east-1		Amazon resource name (ARN) arn:aws:s3::[REDACTED]		Creation date September 4, 2020, 20:31:45 (UTC+04:00)	

Output Configuration

To configure the output:

1. Enabled Create New Folder Per Session to create a separate folder for each time the Importer is run, named after the date and time of the run.

OUTPUT CONFIGURATION

Create new folder for each session

Generate manifest file

FILE FORMAT

EML

MSG

JSON

Remove invalid characters from message headers

Replace empty "To" field with SMTP address:

2. Enable Generate manifest file checkbox, to have a generated a CSV file that will contain the list of generated message files.
3. Specify the format of the exported message: EML, MSG or JSON.

You can easily convert your .msg file into an .eml file as there could be possibilities where you want to view an .msg file but you do not have MS Outlook to open it. The .msg files are client dependent because they are a proprietary message for Outlook, whereas .eml is a text - based file representing a message. Therefore, having single messages stored in .EML rather than an .msg file proves more beneficial for the users, due to its flexibility.

1. The Remove invalid characters from message headers checkbox is activated by default.
2. Enter the SMTP address in case you want to Replace the empty "To" with an SMTP address in the corresponding field.

The JSON file format is available in all the collectors' folder target but currently is supported only for the below listed collectors. For other collectors an error will be thrown.

- Amazon S3
- Audio Video
- Box

- Chatter / Chatter Cipher Cloud
- Cloud9
- Dropbox Business
- Dubber Speik Recordings
- Dubber Speik SMS
- FX Connect
- iMessage
- Jabber Enterprise
- JSON
- LSEG (Refinitiv)
- Microsoft Teams for Audio and Video
- Microsoft Teams via Export API
- NTR-X
- OneDrive for Business
- Pivot
- Redtail Speak
- RingCentral
- ServiceNow
- Slack eDiscovery
- Skype for Business
- Symphony
- Text- Delimited (newly created ones, not upgraded)
- Verba
- Verint
- X (Twitter)
- Web Page Capture
- WhatsApp
- Workplace from Facebook
- XIP
- XSLT/XML (newly created ones, not upgraded)

- Yieldbroker
- YouTube
- Zoom Chat
- Zoom Meetings
- Zoom Meetings Chats
- Zoom Meetings via Archiving API

Envelope

The following options are available:

ENVELOPE

From

To

Construct Envelope messages

Use a preset FROM and TO in the outer envelope headers

Place BCC users in the TO field

- The Construct envelope messages option when enabled envelopes the original output message in a new message with the From and To email addresses set in the corresponding fields.
- The Use a preset FROM and TO in the outer envelope headers option adds the From and To email addresses of the original output message in the header of the envelope.
- The Place BCC users in the TO field option adds the email addresses from the BCC field of the original output message to the TO field.

“ ”

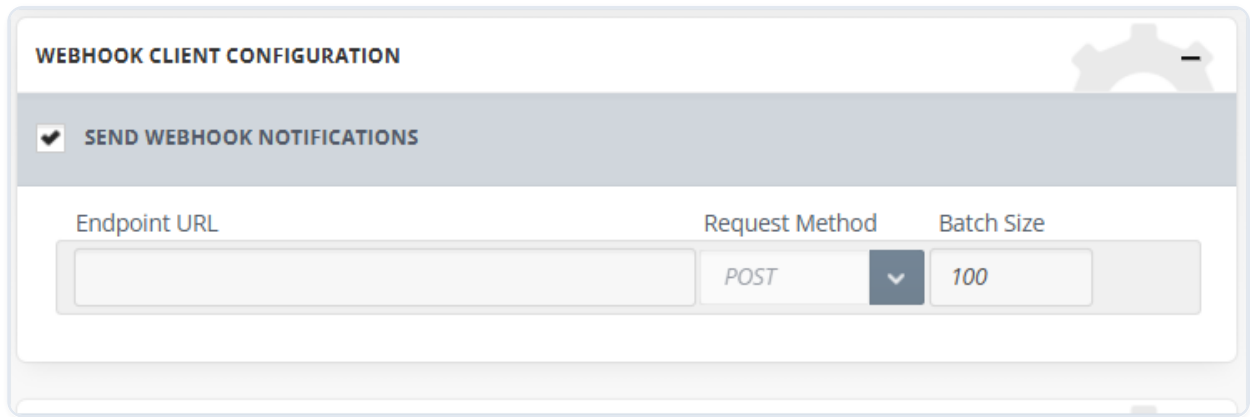
Note: The service account that runs the service should have read/write permission for the specified folder.

“ ”

Webhook Client Configuration

To configure the section:

1. Enable Send Webhook Notifications.



WEBHOOK CLIENT CONFIGURATION

SEND WEBHOOK NOTIFICATIONS

Endpoint URL	Request Method	Batch Size
<input type="text"/>	POST	100

2. Specify Endpoint URL.
3. Specify Batch Size. The default size is 100.

“ ”

Note: The default value for Request Method is POST.

“ ”

Status Update Configuration

To configure the section:

1. Enable Send Status Update.
2. Specify Endpoint URL.

STATUS UPDATE CONFIGURATION ⚙️

SEND STATUS UPDATE

Endpoint URL

POST

▼

“ ”

Note: The default value for Request Method is POST.

“ ”

Azure Blob Target

To deliver data collected from different sources to the Azure Blob storage, Azure storage should be configured accordingly. For more information on how to configure Azure Storage, see [the section called “Configuring Azure Storage”](#).

Using custom domains is not supported, the URL must point to one of the well-known Azure Storage endpoints listed below:

- blob.core.windows.net
- blob.core.usgovcloudapi.net
- blob.core.chinacloudapi.cn

To configure Azure Storage:

1. Enable Connection String and enter the Connection String copied in step 9.

Or,

1. Enable Service SAS URL and enter the Service SAS URL copied in step 9.
2. Enter Blob Container Name from step 10.

AZURE STORAGE CONFIGURATION

CONNECTION

Connection String

Service SAS URL

TEST CONNECTION

Blob Container Name *

Configuring Azure Storage

For Azure Blob storage:

1. Login to your [Azure portal](#) account.
2. Navigate to Storage Accounts.
3. Click the account Name.
4. On the left side navigation pane, navigate to Shared Access Signature.
5. For Allowed services, enable Blob.
6. For Allowed resource types, enable Service, Container, and Object.
7. For Allowed permissions, enable:
 - Read
 - Write
 - Add
 - Create List
8. Specify the Expiration start and end date and click Generate SAS and connection string.

9. Copy Connection string or Blob service URL for Connection configuration.
10. On the left side navigation pane, select Containers and click the name of the container you want and save the name for later use.

Output Folder Configuration

To configure the section:

1. If Create New Folder Per Session is enabled, a separate folder will be created for each time the Importer is run, named after the date and time of the run.
2. If the Generate manifest file checkbox is enabled, a CSV file is generated that will contain the list of generated message files.

OUTPUT CONFIGURATION

Create new folder for each session

Generate manifest file

FILE FORMAT

EML

MSG

JSON

Remove invalid characters from message headers

Replace empty "To" field with SMTP address:

3. Specify the format of the exported message, EML, MSG or JSON. See the difference between the file types in the table below.



Note: You can easily convert your .MSG file into an .EML file as there could be possibilities where you want to view an .MSG file but you do not have MS Outlook to open it. .MSG files are client dependent because they are a proprietary message for Outlook, whereas .EML is a text-based file representing a message. Therefore, having single messages stored in .EML rather than an .MSG file proves more beneficial for the users, due to its flexibility. **Note:** JSON file

format is available in all the collectors' folder target but currently is supported only for the below listed collectors. For other collectors an error will be thrown.

“ ”

- Amazon S3
- Audio Video
- Box
- Chatter / Chatter Cipher Cloud
- Cloud9
- Dropbox Business
- Dubber Speik Recordings
- Dubber Speik SMS
- FX Connect
- iMessage
- Jabber Enterprise
- JSON
- LSEG (Refinitiv)
- Microsoft Teams for Audio and Video
- Microsoft Teams via Export API
- NTR-X
- OneDrive for Business
- Pivot
- Redtail Speak
- RingCentral
- ServiceNow
- Slack eDiscovery
- Skype for Business
- Symphony
- Text- Delimited (newly created ones, not upgraded)
- Verba

- Verint
 - X (Twitter)
 - Web Page Capture
 - WhatsApp
 - Workplace from Facebook
 - XIP
 - XSLT/XML (newly created ones, not upgraded)
 - Yieldbroker
 - YouTube
 - Zoom Chat
 - Zoom Meetings
 - Zoom Meetings Chats
 - Zoom Meetings via Archiving API
4. The Remove invalid characters from message headers checkbox is activated by default.
 5. Enter the SMTP address in case you want to Replace the empty "To" with an SMTP address in the corresponding field.

Envelope

To configure the section:

1. The Construct Envelope messages option when enabled envelopes the original output message in a new message with the From and To email addresses set in the corresponding fields.
2. The Use a preset FROM and TO in the outer envelope headers option adds the From and To email addresses of the original output message in the header of the envelope.
3. The Place BCC users in the TO field option adds the email addresses from the BCC field of the original output message to the TO field.

ENVELOPE

From

To

Construct Envelope messages

Use a preset FROM and TO in the outer envelope headers

Place BCC users in the TO field

“ ”

Note: The service account that runs the service should have read/write permission for the specified folder.

“ ”

Webhook Client Configuration

To configure the section:

1. Enable Send Webhook Notifications.

WEBHOOK CLIENT CONFIGURATION

SEND WEBHOOK NOTIFICATIONS

Endpoint URL	Request Method	Batch Size
<input type="text"/>	POST	100

2. Specify Endpoint URL.
3. Specify Batch Size. The default size is 100.

“ ”

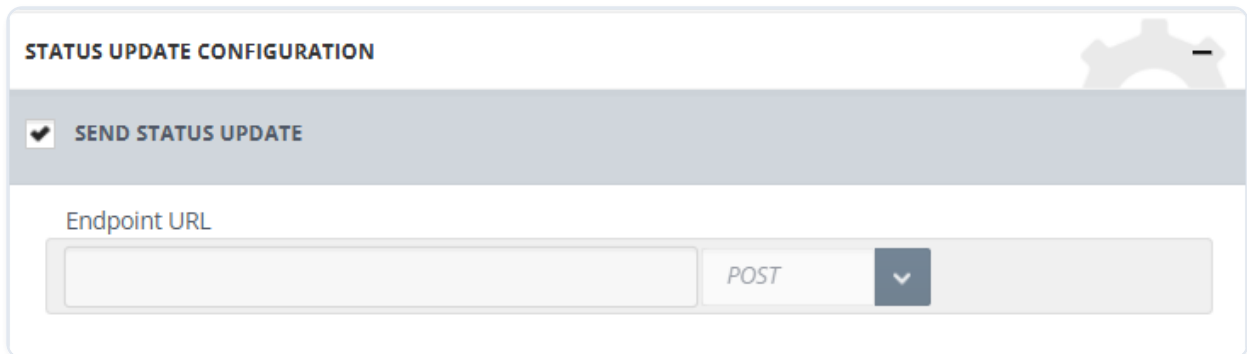
Note: The default value for Request Method is POST.

“ ”

Status Update Configuration

To configure the section:

1. Enable Send Status Update.



The screenshot shows the 'STATUS UPDATE CONFIGURATION' section of a web interface. At the top right, there is a gear icon and a minus sign. Below the title, there is a checkbox labeled 'SEND STATUS UPDATE' which is checked. Underneath, there is a label 'Endpoint URL' above a text input field. To the right of the input field is a dropdown menu currently showing 'POST' with a downward arrow.

2. Specify Endpoint URL.

Direct SMTP Target

Direct SMTP target allows delivering the processed messages directly to the recipients' SMTP server without requiring relaying through a secondary SMTP server like in the SMTP target.

CONFIGURATION WIZARD ✕

SOURCE
MONITORED USERS
FILTERS
TARGETS
SETTINGS

Please provide your SMTP target configuration so that Alta Capture can deliver your data.

Target name *

Target type

ENVELOPE

From

To

Construct Envelope messages

Use a preset FROM and TO in the outer envelope headers

TEST CONNECTION

BACK
NEXT

To set up the target:

1. Specify the sender SMTP address that you want to use in the From field. We recommend using an existing email address so the emails will not be sent to spam.
2. Specify a destination email address in the To field.
3. When you have filled in all the fields, click Next.
4. When the Place BCC users in the TO field is selected, the BCC emails of the message will be added to the TO field.

EWS Server Target



Insight Capture delivers the data to the Exchange Web Services server you have chosen. The EWS server target can be used to connect to the on-prem and Microsoft Exchange Online servers.

“ ”


Note: In case of connecting to the Microsoft Exchange Server Online, only Microsoft OAuth is supported.

“ ”

DESTINATION MAILBOX

EWS URL SMTP Address Replace empty "To" field
with SMTP address: Override the Message Class set by the Importer with IPM.Note

AUTHENTICATION TYPE

 OAuth*If you do not have an app created for EWS, please [click](#) for more information.*Tenant ID Application ID X.509 Certificate file X.509 Certificate password Use Exchange Personal ArchiveDefault Sender Timeout msTarget folder  Allow subfolder creation Construct envelope messages

To set up the target:

1. Enter EWS URL.

2. Enter the SMTP address in the relevant field.
3. Click + to add other SMTP addresses and click Connect in Authentication Type. In case the email address is valid, a check icon is displayed. Otherwise, information will be provided about the incorrect address. This feature allows for overcoming size and count limitations by distributing the messages across multiple locations instead of using a single one.
4. Enter an SMTP address for the Replace empty "To" field with SMTP address field.
5. Enable the Override the Message Class set by the Importer with IPM.Note checkbox to ensure items are delivered only with the message class IPM.Note. Leave it unchecked to ensure items are delivered with the message class IPM.Note.\<MessageClass\>.
6. Activate OAuth, provide Application ID, Tenant ID, and Thumbprint in case you select OAuth Authentication type. For step-by-step instructions on how to get Application ID, Tenant ID, and Thumbprint, see [Microsoft Entra ID App Creation](#) and [Creating a Certificate \(Private and Public Keys\)](#) accordingly.
7. Specify a Default Sender address for emails with empty FROM fields (EWS rejects such emails).
8. Click Connect, to get the folder list.
9. Specify a Target folder for imported data.

When you have filled in all the fields, click Next.

“ ”

Note: By checking Use Exchange Personal Archive, the import of data to the Personal Archive folder of the Target folder will be enabled. **Note:** By checking the Construct Envelope Message, the import of data in MS Exchange journal report format (the X-MS-journal-report header is also added) will be enabled.

“ ”

SFTP Target

The SFTP target allows Arctera Insight Capture to deliver data to an FTP/SFTP server address.

Below you can find information on how to setup the SFTP target for your collector.

FTP/SFTP Connection

For Connection:


1. Enter the hostname of the remote FTP server and the folder path provided by the source in the Host and Path fields, respectively. The default FTP port is 21.

CONNECTION

Use SSH key authentication

Host * Port *

Path *

Connection type 

Use security

Implicit SSL

Explicit SSL

SSH

AUTHENTICATION

Anonymous access

Username *

Password *

TEST CONNECTION

2. Make sure the connection settings match those of the SFTP server. Enter the Path to the required folder.
3. Enable Use SSH Key Authentication to open the configuration window. SSH Key Authentication is used for connecting to the source SFTP server.
4. For Authentication, enter the Username provided by the source.

CONNECTION

Use SSH key authentication

Host * Port *

Path *

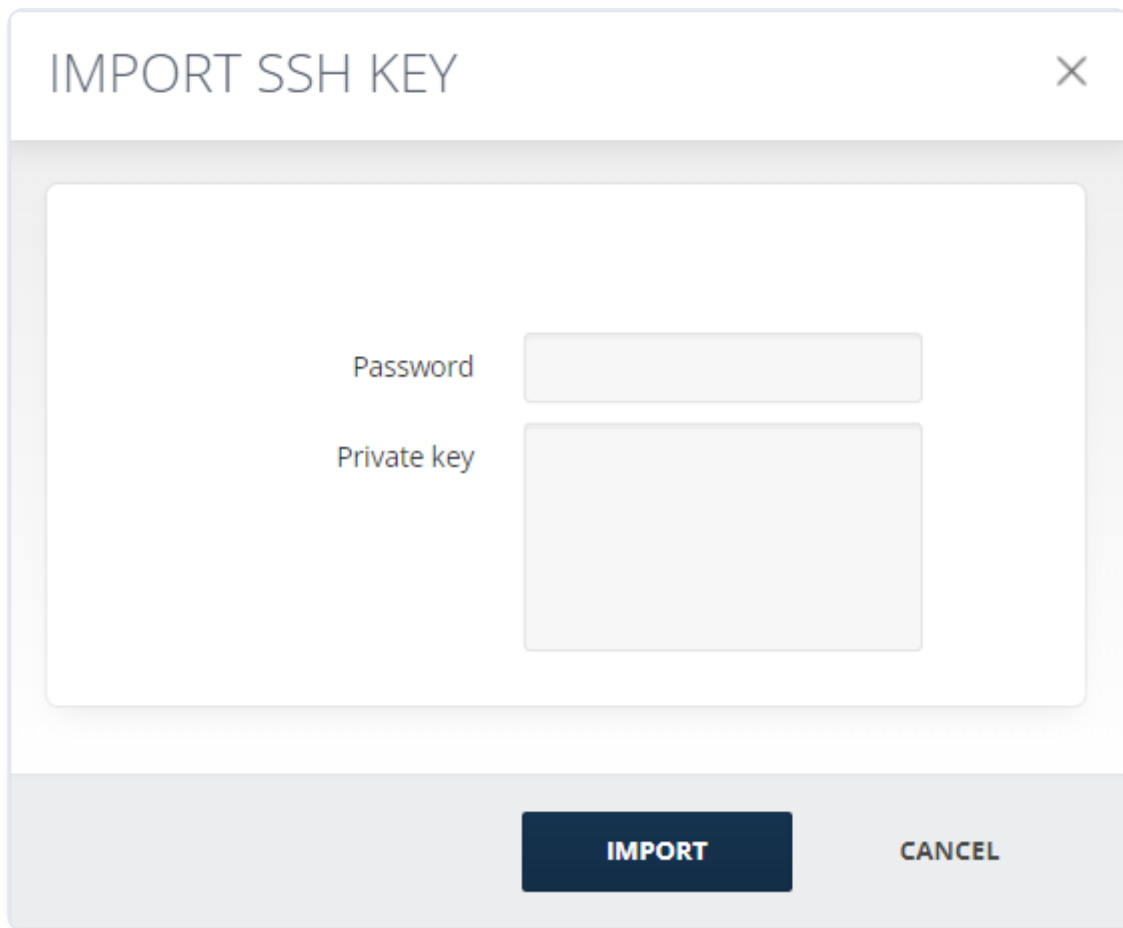
AUTHENTICATION

Username *

Public key *

Import private key

5. Click the Import Private Key button and Import SSH Key will open.
6. Copy and paste the Private Key.



IMPORT SSH KEY

Password

Private key

IMPORT CANCEL

7. Enter Password.
8. Click Import and the Public Key field will be populated automatically.
9. In case you enable Use Security, select FTP connection type from the Connection Type drop-down list. FTP can run in either passive or active mode. The information about the connection type should be provided by the FTP host. If you wish to use FTP over SSL, enable the Use Security checkbox and choose the connection method Implicit SSL, Explicit SSL or SSH.
10. Enter the Username and Password fields provided by the source.
11. Click Test Connection. If the connection is successful, a green check sign is displayed.
12. To enable anonymous FTP connections, enable the Anonymous Access checkbox which is the default settings.

AUTHENTICATION

Anonymous access

Username *

Password *

TEST CONNECTION

Output Folder Configuration

To configure the section:

1. If Create New Folder Per Session is enabled, a separate folder will be created for each time the Importer is run, named after the date and time of the run.
2. If the Generate manifest file checkbox is enabled, a CSV file is generated that will contain the list of generated message files.

OUTPUT CONFIGURATION

Create new folder for each session

Generate manifest file

FILE FORMAT

EML

MSG

JSON

Remove invalid characters from message headers

Replace empty "To" field with SMTP address:

3. Specify the format of the exported message, EML, MSG or JSON. See the difference between the file types in the table below.



Note: You can easily convert your .MSG file into an .EML file as there could be possibilities where you want to view an .MSG file but you do not have MS Outlook to open it. .MSG files are client dependent because they are a proprietary message for Outlook, whereas .EML is a text-based file representing a message. Therefore, having single messages stored in .EML rather than an .MSG file proves more beneficial for the users, due to its flexibility. **Note:** JSON file format is available in all the collectors' folder target but currently is supported only for the below listed collectors. For other collectors an error will be thrown.



- Amazon S3
- Audio Video
- Box
- Chatter / Chatter Cipher Cloud
- Cloud9
- Dropbox Business
- Dubber Speik Recordings
- Dubber Speik SMS
- FX Connect
- iMessage
- Jabber Enterprise
- JSON
- LSEG (Refinitiv)
- Microsoft Teams for Audio and Video
- Microsoft Teams via Export API
- NTR-X
- OneDrive for Business
- Pivot
- Redtail Speak
- RingCentral
- ServiceNow
- Slack eDiscovery

- Skype for Business
 - Symphony
 - Text- Delimited (newly created ones, not upgraded)
 - Verba
 - Verint
 - X (Twitter)
 - Web Page Capture
 - WhatsApp
 - Workplace from Facebook
 - XIP
 - XSLT/XML (newly created ones, not upgraded)
 - Yieldbroker
 - YouTube
 - Zoom Chat
 - Zoom Meetings
 - Zoom Meetings Chats
 - Zoom Meetings via Archiving API
4. The Remove invalid characters from message headers checkbox is activated by default.
 5. Enter the SMTP address in case you want to Replace the empty "To" with an SMTP address in the corresponding field.

Envelope

To configure the section:

1. The Construct Envelope messages option when enabled envelopes the original output message in a new message with the From and To email addresses set in the corresponding fields.
2. The Use a preset FROM and TO in the outer envelope headers option adds the From and To email addresses of the original output message in the header of the envelope.
3. The Place BCC users in the TO field option adds the email addresses from the BCC field of the original output message to the TO field.

ENVELOPE

From

To

Construct Envelope messages

Use a preset FROM and TO in the outer envelope headers

Place BCC users in the TO field

“ ”

Note: The service account that runs the service should have read/write permission for the specified folder.

“ ”

Webhook Client Configuration

To configure the section:

1. Enable Send Webhook Notifications.

WEBHOOK CLIENT CONFIGURATION

SEND WEBHOOK NOTIFICATIONS

Endpoint URL	Request Method	Batch Size
<input type="text"/>	POST	100

2. Specify Endpoint URL.
3. Specify Batch Size. The default size is 100.

“ ”

Note: The default value for Request Method is POST.

“ ”

Status Update Configuration

To configure the section:

1. Enable Send Status Update.

2. Specify Endpoint URL.

SMTP Target

If you choose a SMTP Target, Arctera Insight Capture will deliver the data to an SMTP server address you provide.

To configure Main Settings:

1. Specify the SMTP Server and Port fields.

“ ”

Note: The default is 587.

“ ”

2. Enter an SMTP address for the Replace empty "To" field with SMTP address field. If needed, provide a fallback email address to be used when an outgoing message has an empty "To" field. This ensures the message is still processed and not rejected due to missing recipient data.

3. Enter a valid email address that will be used to replace the "From" address in outgoing emails.

MAIN SETTINGS

SMTP server

Port

Replace empty "To" field with SMTP address:

Replace "From" field with SMTP address:

Remove invalid characters from message headers

To configure the Envelope section:

1. Specify a destination email address in the To field and a return address in the From field.
2. Enable the Construct Envelope messages checkbox to envelope the original output message in a new message with the From and To email addresses set in the corresponding fields. The Use a preset FROM and TO in the outer envelope headers option adds the From and To email addresses of the original output message in the header of the envelope.

“ ”

Note: When enabling the Construct Envelope Messages checkbox, data in MS Exchange journal report format (the X-MS-journal header also be added) will be imported.

“ ”

3. Enable Place BCC users in the TO field to add the email addresses from the BCC field of the original output message to the TO field.

“ ”

Note: When enabling the Place BCC users in the TO field checkbox, all BCC recipients will be moved to the TO field.

“ ”

ENVELOPE

From

To

Construct Envelope messages

Use a preset FROM and TO in the outer envelope headers

Place BCC users in the TO field

“ ”

Note: SMTP Target is not recommended for delivering messages to Exchange Online Mailboxes, due to various throttling policies set by Microsoft. Also, Exchange Online does not accept Journal Envelope messages which can result in loss of original message time stamps and other metadata.

“ ”

To configure Authentication Encryption:

1. Enable Use SSL encryption if you want to use SSL encryption. When enabled you can also check the Implicit checkbox to encrypt the entire FTP connection from the start of the session.
2. Enable Use TLS Encryption if you want to encrypt using TLS.
3. Enable Supply Username and password to enter username and password.

“ ”

Note: For Encryption, SSL and TLS encryption settings should match those of the target SMTP server. Click Test Connection to check the connection and to ensure that your settings are accurate.

“ ”

AUTHENTICATION ENCRYPTION

Use SSL Encryption

Implicit

Use TLS Encryption

Provide username and password

Username

Password

TEST CONNECTION

Google Vault Target

Before configuring the Google Vault Target in the Arctera Insight Capture UI, the following configurations should be done in Google Admin Console.

- Google Vault Configuration
- Google Vault Target Configuration

Google Vault Configuration

To configure the section

1. Login to <https://console.cloud.google.com/> using an Administrator account, click Select a project, then NEW PROJECT.
2. Enter a name for the project and click CREATE.
3. Once the project is created, and there are multiple projects, click SELECT PROJECT from the Notifications. You will be navigated to the created project dashboard.

“ ”

Note: If this is the first project created, you will automatically be navigated to the project dashboard.

“ ”

4. Hover APIs & Services, then select Library.
5. In the Search for APIs & Services search box, type Gmail.
6. Click Gmail API.
7. Once you are in the Gmail API page, click ENABLE.
8. Click Credentials.
9. Click Manage service accounts.
10. Click \+ CREATE SERVICE ACCOUNT.
11. Enter a name and a description for the service account and click CREATE AND CONTINUE.
12. Select Owner as a role and click CONTINUE, then click DONE.
13. You will be redirected to the Service Accounts page. Click the kebab icon and select Manage keys.
14. Select ADD KEY > Create new key.
15. Select JSON as a key type and click CREATE.
16. Once the key is created, you should get prompted to save the file on your computer, save it somewhere secure, you will need it when configuring the collector.
17. To grant permissions to the application, go to <https://admin.google.com> > Security > API controls.
18. Scroll down to Domain wide delegation section and click MANAGE DOMAIN WIDE DELEGATION.
19. Click Add new.
20. Open the key file that you saved as JSON above, copy the value of client_id, then paste it in the Client ID field. Enter `https://www.googleapis.com/auth/gmail.insert` in OAuth scopes field and click AUTHORIZE.

Google Vault Target

To set up the section:

1. Upload JSON file saved in the step 15 of the previous section by clicking SELECT.

2. Specify the mailbox, to which the imported messages should be delivered, in the Destination mailbox field.
3. When Mark messages as deleted option is checked, the imported messages are not visible in the All Mail section but are still available for compliance search.
4. Click SEND TEST EMAIL to test the connection to the target.

CONFIGURATION WIZARD


SOURCE MONITORED USERS FILTERS **TARGETS** SETTINGS

Target name * Target type

SERVICE ACCOUNT KEY

Credentials JSON file*

Destination mailbox*

Mark messages as deleted 

BACK

« »

Note: You can download the uploaded JSON file by clicking Download. It is active only when there is a JSON file to download.

« »

EV Folder Target

“ ”

Note: The target is applicable only to Arctera Insight View Compliance and Governance.

“ ”

If the EV Folder target is configured for the importer, the original items will be directly delivered to that folder.

CONFIGURATION WIZARD ×

SOURCE	MONITORED USERS	FILTERS	TARGETS	SETTINGS
--------	-----------------	---------	----------------	----------

Target name * Target type

Replace empty "To" field with SMTP address:

BACK

SETTINGS

This section includes the following topics:

- [Importer Settings](#)
- [Reporting & Message Tracking](#)
- [Message Headers](#)
- [Logging](#)
- [Importer Schedule](#)
- [Filtering](#)
- [Processing](#)
- [Advanced Configuration Options](#)

Importer Settings

The final step for the Importer Configuration Wizard is the Importer Settings. Under this tab, you can configure the following:

Importer Settings

1. [Reporting & Message Tracking](#)
2. [Message Header](#)
3. [Logging](#)
4. [Importer Schedule](#)
5. [Filtering](#)
6. [Processing](#)
7. [Advanced Configuration Options](#)

Reporting & Message Tracking

The following section of the Importer Settings refers to email reports, which may be used to deliver statistical information (also viewable on the Dashboard) via email.

Reports are different from collector to collector, based on the activities that can be captured from them.

REPORTING & MESSAGE TRACKING ⚙️

REPORT LEVEL

Generate summary report only

EMAIL REPORT SETTINGS

Message subject

Recipient email

SEND TEST EMAIL

CUSTOM HEADERS

Header Name	Value
<input type="text"/>	<input type="text"/>

To configure the section:

1. For Report Level, Generate Summary Report Only 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.

“ ”

Note: Detailed reports are longer and take more time to read. Reports exceeding 5 MB are shortened.

“ ”

2. Enter Message subject for the report message.
3. Enter Recipient email address for delivering reports.
4. For Custom Headers, enter Header Name and Value.

Message Headers

Message headers are custom headers that are used for labeling and sorting messages.

MESSAGE HEADERS ⚙️ -

+

INCLUDE FULL HEADERS INFORMATION

In message body

As HTML attachment

“ ”

Note: Filters are not applied to headers generated by these settings.

“ ”

To configure the section:

1. Fill in the Header name and Value fields and click +.
2. Include the full header information either in the message body (with metadata separators in between) or as HTML attachment (as Metadata.HTML attachment).

“ ”

Note: These settings do not apply to the EML source.

“ ”

The existing custom headers can be overridden if the user specifies another Header name. The user cannot specify one of the following headers and the added header must meet RFC 5322 standard:

- Message-ID
- From
- To
- Cc
- Bcc
- Subject

- Date
- In-Reply-To

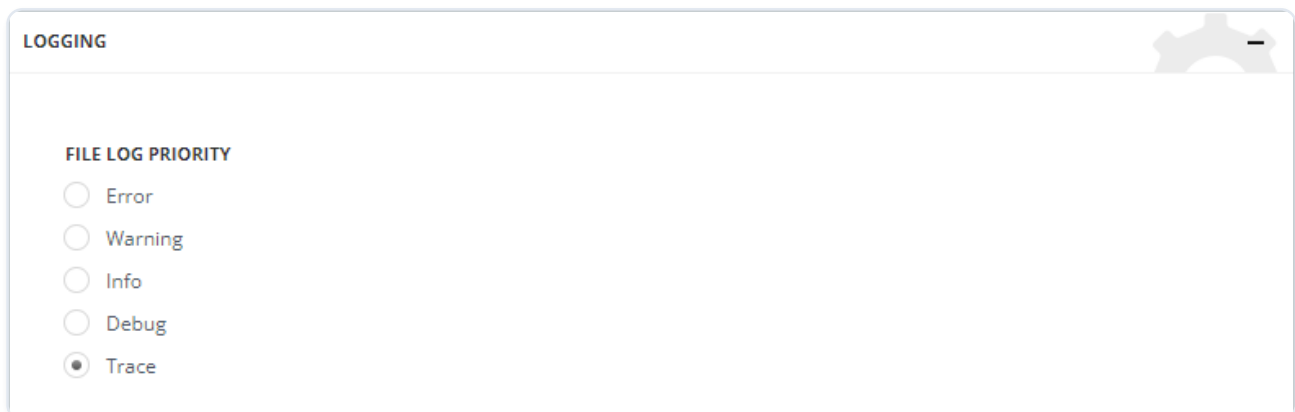
References

- MIME-Version
- Content-Type
- Content-Transfer-Encoding
- Received
- Return-Path
- Authentication-Results
- DKIM-Signature

Logging

Enter a file path in file log folder field. File logs are typically used for troubleshooting purposes. This field is required.

With File Log Priority the logs are saved in a separate log file and with Event Log Priority the event Logs are stored in the Windows Event Viewer and is used to avoid third-party tools in Windows. Also, the latter helps to customize logging process and facilitate monitoring based on requirements.



LOGGING

FILE LOG PRIORITY

- Error
- Warning
- Info
- Debug
- Trace

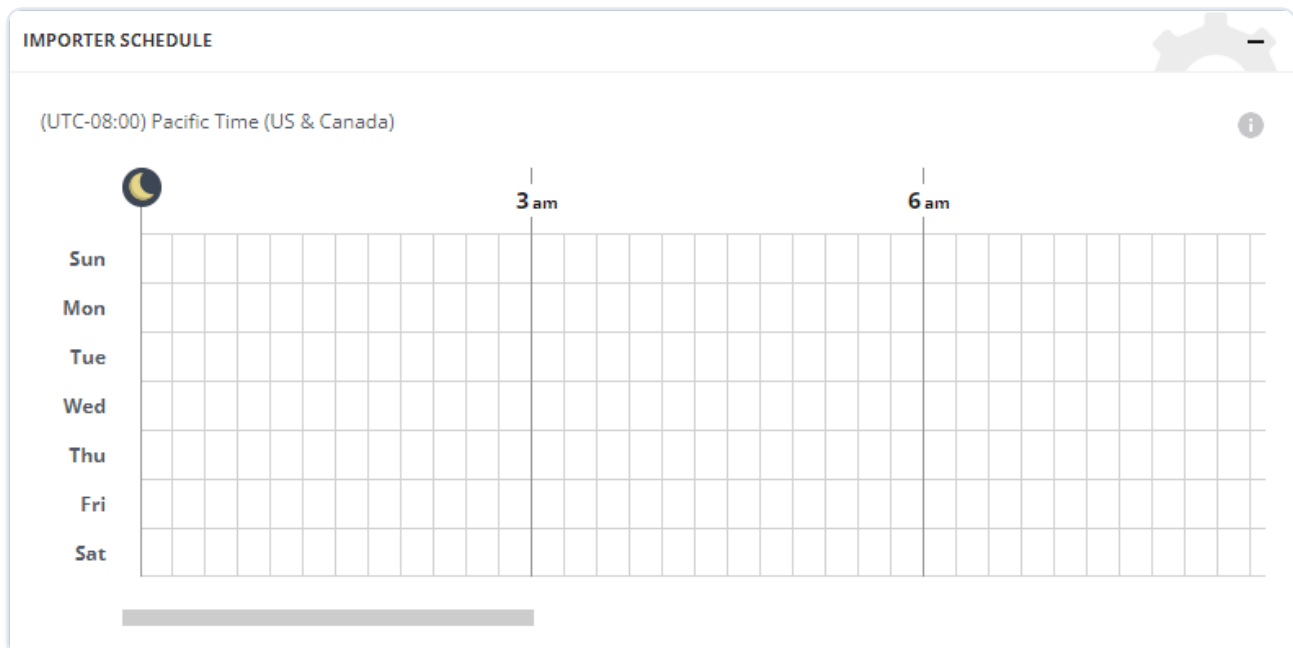
For File Log Priority:

- Error. Only errors are recorded in the log file. Example: ERROR Arctera Insight Capture.Core.SenderThread - \<1\> Failed to send message #4, TargetError. Error: Failed to save message C:\Users\Desktop\Bloomberg Target\4.eml: Header name contains invalid characters.

- Warning. In addition to error logs, warning logs are also added. Example: WARN Arctera Insight Capture.Core.Importer - The report won't be sent as no Email Address is provided.
- Info. This logging level gives information on performed actions. Example: INFO Arctera Insight Capture.Core.Importer -Creating default Target.
- Debug. This logging level provides information on how an action was accomplished. It gives more detailed overview than the previous three levels. Example: DEBUG Arctera Insight Capture.Core.Importer - new session for Importer: 1
- Trace. The trace level is the lowest logging level, e.g., is the most detailed one. TRACE Arctera Insight Capture.Core.SenderThread - \<31\> Preparing message #820 for sending. When choosing Trace logging level, a warning message will appear notifying about possible security risks with this level of logging. Sensitive data can be stored in the log as plain text.

Importer Schedule

Here you have the option to choose the Selected Times importer schedule option. This enables you to set a weekly automated option. Increments are at 15-minute intervals.



Even if the scheduler is enabled, but a time is not selected through Importer Schedule, the job will not be queued.

Filtering

Filters will not be applied unless filtering is enabled. enable the Enable filtering checkbox to configure their behavior.

To configure the filter:

1. Enable the Enable filtering checkbox and select the corresponding option:
 - Unconditional hit default target \- If selected, all data will be delivered to the default target, even if an alternative target is set.
 - Process first hitting filter \- If enabled, a single message will be sent to the first Target which fulfills the filters condition.
 - Process and matching filter \- If enabled, Filter and Target pairs will be configured, and a copy will be sent to the target for each filter fulfillment.
 - Process all matching filters \- If enabled, only filters can be configured with a single target.
2. Select the filter name and choose the target from the drop-down menu where the corresponding messages should be sent.
3. Click the activated + button to add the filtering setting, otherwise it will not be saved.

FILTERING

ENABLE FILTERING

Unconditional hit default target

Process first hitting filter

Process any matching filter

Process all matching filters

Filter Target

+

Processing

The following options are available for Processing options:

PROCESSING ⚙️

PROCESSING OPTIONS

Process all messages (failed messages will be reprocessed first)
 Process new messages only
 Process failed messages only

Add the following note to the forced-import message body when

Attachment is missing This message contained the following attachment(s) that actually didn't exist:

Disclaimer is missing This message contained the following disclaimer that actually didn't exist:

(Names of the missing items will be appended automatically)

CONTENT OPTIONS

Strip group address info
 Set content-disposition to "inline" if missing
 Set display name to SMTP address when empty

MATCH EMAIL ADDRESS

Change the SMTP address
 Change the display name
 Change the display name and SMTP address
 Enable case-insensitive matching

Upload CSV File

SELECT

PREVIEW MATCH EMAIL MAPPINGS

- Processing Options is mostly used for the troubleshooting purpose.
- It is advised to use Process Failed Messages Only when there is a big number of failed messages.
- If there are problems with connection which lead to failed messages, Process All Messages is the preferred choice. If necessary, change this setting to process new segments or failed segments exclusively.
- Attachment is missing \- This line is added to the first line of the reprocessed segments with references to missing attachments.
- Disclaimer is missing \- This line is added to the first line of the reprocessed segments with references to missing disclaimers.

- Strip Group Address Info \- This option is selected by default and applies to the EML collector. With this option, recipients in the header (To, CC and BCC) in an EML file will be removed upon conversion.
- Set Content-Disposition to inline if missing \- This option applies only to the EML source. When processing EML files that have image attachments, Arctera Insight Capture will insert any missing.
- Content Disposition header fields and set their disposition type to inline so that images will appear in the message body when they are viewed in applications such as Microsoft Outlook.
- Set display name to SMTP address when empty \- Enter the SMTP address in the Display Name field.

Match Email Address \- The Match Email Address option can match the existing ID or SMTP Address and replace:


- SMTP Address
- Display Name
- Display Name and SMTP Address

The CSV file should contain the following columns:

- Last Name (A)
- First Name (B)
- Company Name (C)
- Old Email (D)
- New Email (E)

Advanced Configuration Options

With the help of Enable Import Throttling you can reduce bandwidth consumption by breaking down the data transfer into chunks with delays in between.

ADVANCED CONFIGURATION OPTIONS 

ENABLE IMPORT THROTTLING

Chunk size **records**

Delay **milliseconds**

MISC

Max target errors **(0 to disable)**

After you have filled in all the fields in the five tabs you will have to click Save & Finish. In case you want to make changes in the Wizard, click back and you will be redirected to Importer Settings.

REPORTS

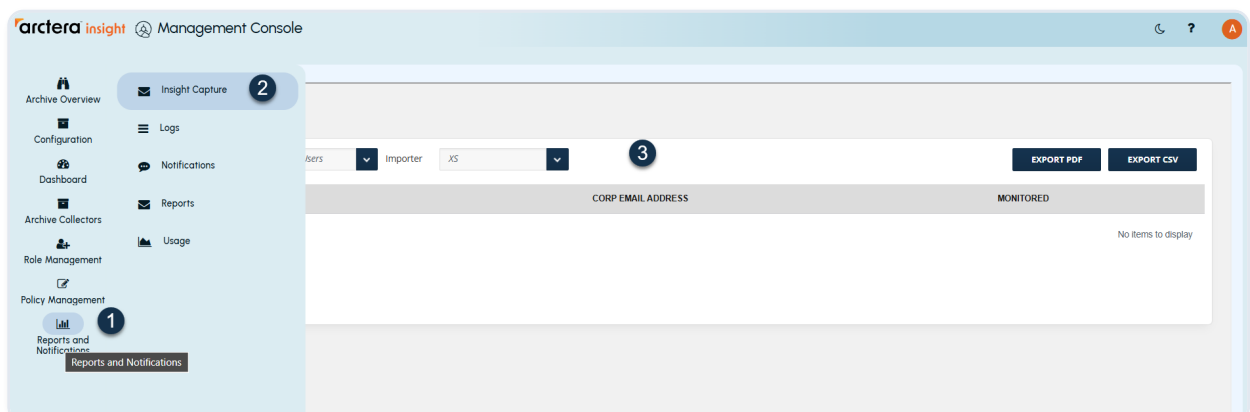
This section includes the following topics:

- [Overview](#)
- [Managing Reports](#)
- [Audit](#)
- [Unprocessed Messages](#)
- [Target Delivery Failure](#)
- [Missing Attachment Failure](#)
- [Missing Disclaimer Failure](#)
- [Data Acquisition Failure](#)
- [Notes](#)

Overview

To view and extract detailed information about the insight Capture user activity and delivery failures:

1. Go to Reports and Notifications in the Navigation pane(1).
2. Expand Reports and click Insight Capture(2).



The following report types are available:

- **Audit:** View Arctera Insight Capture user activity.
- **Monitored Users:** View monitored users by Insight Capture.

- Unprocessed Messages: View unprocessed messages.
- Target Delivery Failure: View all failed attempts to deliver data.
- Missing Attachment Failure: View all failed messages with missing attachments.
- Missing Disclaimer Failure: View all failed messages with missing disclaimers.
- Data Acquisition Failure: View all failed messages with failed data acquisitions.

Managing Reports

After selecting the report type, choose the collector type and which reports you would like to review. You can export the report information either in a PDF or CSV format.

For Audit and Monitored Users reports data can be exported as a PDF or CSV file when clicking Export PDF or Export CSV correspondingly.

The screenshot shows a 'REPORTS' section with a filter bar. The 'Report type' dropdown is set to 'Monitored Users', and the 'collector' dropdown is set to 'XS'. To the right are two buttons: 'EXPORT PDF' and 'EXPORT CSV'. Below the filter bar is a table header with columns: 'NAME', 'CORP EMAIL ADDRESS', and 'MONITORED'.

The Target Delivery Failure, Missing Attachment Failure, Missing Disclaimer Failure, and Data Acquisition Failure reports have actions.

There are the following Reprocessing Options when we click Actions:

- Retry processing \- Retries failed messages processing when the importer is run.
- Force processing \- Processes the failed messages when the importer is run and delivers them to the target without missing data.
- Delete failed messages \- Deletes failed messages from DB.
- Skip \- Does not process failed messages when the importer is running.

After selecting the reprocessing option, click Apply. The configuration will be applied to the data stored in DB. Click OK to close the pop-up window.



Warning: The Reprocessing Options are applied in pairs with the Importer Settings > Processing > Processing Options, i.e., Processing Options should also be configured, so the Reprocessing Options configuration is applied properly.



By default, the Reprocessing option is Retry processing: if not configured by the user, there will be retries with each session to process the failed messages until data reprocessing is succeeded.

Audit

Many important actions that users make such as logging in or configuring importers, are listed in Audit.

REPORTS

Report type: Audit ▼ Date Range: month/day/year month/day/year SEARCH EXPORT PDF EXPORT CSV

TIME	USER	EVENT TYPE	MESSAGE
01/21/2025 13:32	admin@merge1_saas_tenant13.com Admin	UserLoggedIn	User Logged In
01/21/2025 13:32	admin@merge1_saas_tenant13.com Admin	UserLoggedOff	User Logged Off
01/21/2025 13:19	admin@merge1_saas_tenant13.com Admin	TargetAdded	DirectSMTPTarget SMTP added
01/21/2025 13:18	admin@merge1_saas_tenant13.com Admin	TargetAdded	EVFolderTarget EV added
01/21/2025 13:16	admin@merge1_saas_tenant13.com Admin	TargetAdded	GoogleVaultTarget GT added
01/21/2025 13:10	admin@merge1_saas_tenant13.com Admin	TargetAdded	SMTPTarget SMTP added
01/21/2025 13:06	admin@merge1_saas_tenant13.com Admin	TargetAdded	EWSServer EWSS added
01/21/2025 13:05	admin@merge1_saas_tenant13.com Admin	MonitoredUserSourceUpdated	Importer "ZMA" monitored user source updated
01/21/2025 13:05	admin@merge1_saas_tenant13.com Admin	UserLoggedIn	User Logged In
01/21/2025 13:05	admin@merge1_saas_tenant13.com Admin	UserLoggedOff	User Logged Off
01/21/2025 12:49	admin@merge1_saas_tenant13.com Admin	TargetAdded	AmazonS3Target AS3 added
01/21/2025 12:40	admin@merge1_saas_tenant13.com Admin	TargetAdded	AmazonS3Target AW3 added
01/21/2025 12:19	admin@merge1_saas_tenant13.com Admin	FilterAdded	XmlFilter XMLF added
01/21/2025 12:13	admin@merge1_saas_tenant13.com Admin	FilterAdded	TimeStampFiller TF added

The following event types are captured:

- LicenseChanged
- SqlConfigurationUpdate
- TargetAdded
- ConnectorAdded
- FilterAdded
- ImporterAdded
- ComponentSettingsModified
- TargetRemoved
- ConnectorRemoved
- FilterRemoved
- ImporterRemoved

- NetworkSettingsChanged
- AuditSettingsUpdated
- MessageHeadersSettingsUpdated
- ComponentRenamed
- ComponentDataDeleted
- ImporterDataDeleted
- ImporterCloned
- UserLoggedIn
- UserLoggedOff
- UsersCreated
- UsersDeleted
- UserUpdatedProfileInfo
- UserTypeUpdated
- AgentConnected
- AgentDisconnected
- AgentEnabled
- AgentDisabled
- AgentCreated
- AgentDeleted
- AgentUpdated
- AgentUpdated
- AgentPoolAdded
- AgentPoolDeleted
- AgentPoolUpdated
- MonitoredUserSourceUpdated
- APIClientApplicationAdded
- APIClientApplicationRemoved
- APIClientApplicationChanged
- SmtServerSettingsChanged
- ImportJobQueued

- ImportJobCanceled
- ImporterSchedulerEnabled
- ImporterSchedulerDisabled
- TenantAuthConfigUpdated
- JITUserIsProvisioned
- JITUserRoleIsUpdated

The filtering option allows filtering out the list of records from the section using the date range filter and the search functionality.

The screenshot shows a 'REPORTS' section with a table of audit records. The table has columns for TIME, USER, EVENT TYPE, and MESSAGE. The records show various events such as 'User Logged In', 'User Logged Off', 'ConnectorAdded', and 'ImporterAdded'. The interface includes a 'Report type' dropdown set to 'Audit', a 'Date Range' filter set to 'month/day/year', and a 'SEARCH' button. There are also 'EXPORT PDF' and 'EXPORT CSV' buttons. The table is paginated, showing 1-25 of 502 items.

TIME	USER	EVENT TYPE	MESSAGE
01/24/2025 03:21	admin@merge1_saas_tenant20.com Admin	UserLoggedIn	User Logged In
01/24/2025 03:21	admin@merge1_saas_tenant20.com Admin	UserLoggedOff	User Logged Off
01/24/2025 03:07	admin@merge1_saas_tenant20.com Admin	UserLoggedIn	User Logged In
01/24/2025 03:07	admin@merge1_saas_tenant20.com Admin	UserLoggedOff	User Logged Off
01/24/2025 03:00	admin@merge1_saas_tenant20.com Admin	UserLoggedIn	User Logged In
01/24/2025 02:19	admin@merge1_saas_tenant20.com Admin	UserLoggedIn	User Logged In
01/24/2025 02:19	admin@merge1_saas_tenant20.com Admin	UserLoggedOff	User Logged Off
01/24/2025 02:19	admin@merge1_saas_tenant20.com Admin	ConnectorAdded	Connector Zoom Meetings via Archiving API Connector added.
01/24/2025 02:19	admin@merge1_saas_tenant20.com Admin	ImporterAdded	Importer "osaxis" added
01/24/2025 02:18	admin@merge1_saas_tenant20.com Admin	UserLoggedIn	User Logged In
01/24/2025 02:18	admin@merge1_saas_tenant20.com Admin	UserLoggedOff	User Logged Off
01/24/2025 02:05	admin@merge1_saas_tenant20.com Admin	UserLoggedIn	User Logged In
01/24/2025 02:05	admin@merge1_saas_tenant20.com Admin	UserLoggedOff	User Logged Off
01/24/2025 02:05	admin@merge1_saas_tenant20.com Admin	ConnectorAdded	Connector YouTube Connector added.
01/24/2025 02:05	admin@merge1_saas_tenant20.com Admin	ImporterAdded	Importer "y" added

Unprocessed Messages

The Unprocessed Messages report generates information on messages which have been constructed and stored in the database, but there hasn't been an attempt to be sent to the target. Unprocessed messages are reported when:

- A running importer is stopped.
- An importer is force killed before the messages are sent to the target.

“ ”

Note: To process the unprocessed messages, the Processing Options of Importer Settings should be configured.



Target Delivery Failure

This report type generates information on messages which are constructed and stored in the database - there is an attempt to send them to the target, but the attempt is failed. Target delivery failures are reported when:

- The target is configured with invalid credentials.
- The selected target has size limits and there has been an attempt to send larger sizes of messages. Specifically, the SMTP target has size limits and if the messages' size limits exceed the target specified limit, the delivery of the messages to the target will fail.
- A target has insufficient storage.
- A target is overloaded.
- A network connectivity issue occurs.
- A target delivery has failed for some other reasons.

Missing Attachment Failure

For collectors, such as Bloomberg or Symphony, there is an option to fail messages with missing attachments in the Attachment Validation sub-section when configuring Source.

Information on failed messages with missing attachments is reflected in the Missing Attachment Failure report.

Missing Disclaimer Failure

For collectors, such as Bloomberg, there is an option to fail messages with missing disclaimers in the Disclaimer Validation sub-section when configuring Source.

Information on failed messages with missing disclaimers is reflected in the Missing Disclaimer Failure report.

Data Acquisition Failure

When Arctera Insight Capture captures data that is incomplete or damaged, information on the data will be reflected in the Data Acquisition Failure report in case a report is generated.

Initially, this report has been constructed for the Viva Engage (Yammer) collector. According to the configuration, the collector gets a date range, which is divided into chunks (a chunk is one hour) and starts exporting the chunks separately in ZIP files. The ZIP file may or may not contain data depending on the activity that occurred in the Viva Engage (Yammer) communication for the specific hour. Data processing in a chunk (the whole ZIP file export) are reported when:

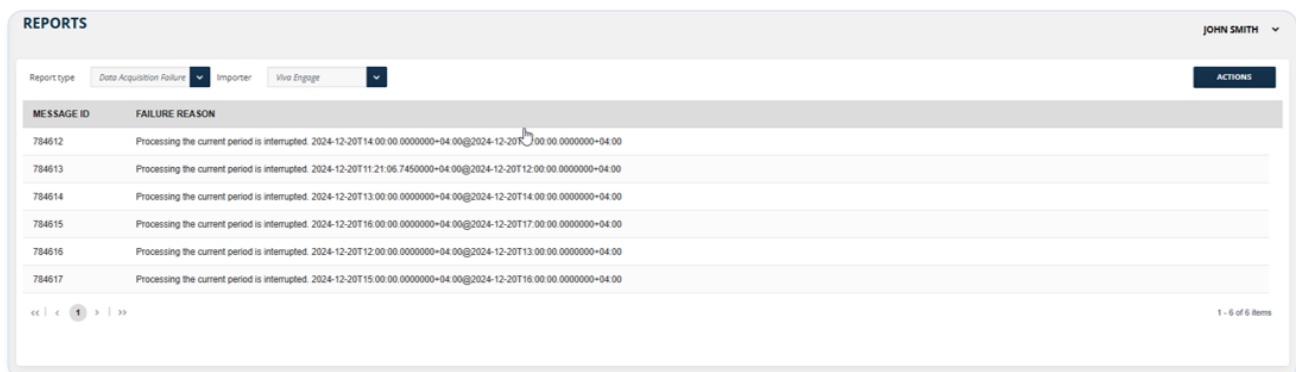
- The download fails, and data processing remains incomplete.
- The download is successful but there has been a column added in the CSV file while no updates have been made on our side.
- An attachment has been added to a file while it is not included in the ZIP file.

When the data processing failure occurs, an output message is constructed. The body of the message contains the start and end dates (separated with ":",") of the processing data (chunk), and the failure type is mentioned as Data Acquisition Failure.

When the data processing failure occurs, an output message is constructed. The body of the message contains the start and end dates (separated with ":",") of the processing data (chunk), and the failure type is mentioned as Data Acquisition Failure.

When Arctera Insight Capture starts running next time and is set up to process the failed messages, the messages (chunks) will be queued to be partially processed (DoPartialProcess for the collector). The body is split into 2 parts - start and end date, by which a range (chunk) is created to reprocess.

The log file reflects information on generated data in the form of messages, while those messages are the chunks, which may or may not contain messages.



The screenshot shows a web interface titled "REPORTS" with a user name "JOHN SMITH" in the top right. Below the title, there are filters for "Report type" (set to "Data Acquisition Failure"), "Importer" (set to "Viva Engage"), and an "ACTIONS" button. The main content is a table with two columns: "MESSAGE ID" and "FAILURE REASON". The table contains six rows of data, each representing a failed data acquisition attempt with a specific message ID and a detailed failure reason including start and end timestamps.

MESSAGE ID	FAILURE REASON
784512	Processing the current period is interrupted. 2024-12-20T14:00:00.0000000+04:00@2024-12-20T14:00:00.0000000+04:00
784513	Processing the current period is interrupted. 2024-12-20T11:21:06.7450000+04:00@2024-12-20T12:00:00.0000000+04:00
784514	Processing the current period is interrupted. 2024-12-20T13:00:00.0000000+04:00@2024-12-20T14:00:00.0000000+04:00
784515	Processing the current period is interrupted. 2024-12-20T16:00:00.0000000+04:00@2024-12-20T17:00:00.0000000+04:00
784516	Processing the current period is interrupted. 2024-12-20T12:00:00.0000000+04:00@2024-12-20T13:00:00.0000000+04:00
784517	Processing the current period is interrupted. 2024-12-20T15:00:00.0000000+04:00@2024-12-20T16:00:00.0000000+04:00

At the bottom of the table, there is a pagination control showing "1 - 6 of 6 items".

Notes

- In the RingCentral collector, data processing also occurs in ranges, however, when a range (chunk) is failed, it is not considered a Data Acquisition Failure: the information is only logged.

- In the Workplace from Facebook and Microsoft Teams via Webhooks collectors, the Data Acquisition Failure report information is generated differently. Specifically, insight Capture messages are generated from the data stream. When a message is not processed for some reasons (e.g., the message contains a new body type, the attachment is missing, or the participant list is absent) the data is stored in the insight Capture DB as a message with the available data (such as from, time, body, subject and more) and the status is specified as Data Acquisition Failure. In this case, the quantity of Data Acquisition Failure messages is equivalent to the number of Unprocessed Messages.
- Only the Viva Engage (Yammer) collector has a reprocessing functionality. Before reprocessing occurs, the failed range (chunk) is deleted from DB. When the range fails again, the record is created again and stored in DB.

APPENDIX

This section includes the following topics:

- [Creating a Certificate \(Private and Public Keys\)](#)

Creating a Certificate (Private and Public Keys)

For private key:

1. Go to the Start menu & click Administrative Tools > Internet Information Services (IIS) Manager and click the server's name in the Connections column on the left and double click Server Certificates.
2. Click Create Self-Signed Certificate in the Actions column on the right.
3. Type any meaningful name and then click OK to proceed.

Once that is complete, you should now see the SSL in the list of Self-Signed certificates. Now, you have IIS Self-Signed Certificate with 1 year validation.

1. Right-click on that certificate and click Export.

Specify the path, type the password, confirm the password, and click OK. Now, you have exported the Private key.

For public key:

1. Launch Microsoft Management Console. Press Win+R, type `mmc.exe` and click OK.
2. Click File and select the Add/Remove Snap-in option.
3. Click Certificates in the list of Available snap-ins and then click Add.
4. Select Computer account and click Next. Choose Local Computer and click Finish.
5. Click OK to add the certificate snap-in and get back to console.
6. Expand the Personal folder in the left-side menu and choose Certificates.
7. Right-click the certificate you want to export - All Tasks > Export.
8. On the prompt menu, click Next.
9. Click No. Do not export the private key.
10. Choose Base-64 encoded X.509 (.CER) and click Next.

11. Fill in the file path and click Next.
12. Click Finish and now you have the Public key.