



# **PROMODAG REPORTS 10.4**

## **Getting started**

### **On-Premises and Hybrid environments**

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## About this guide

This guide is designed to provide a quick introduction to Promodag Reports for Microsoft Exchange, and it describes steps from getting started to producing the first report.

For more details about specific features of Promodag Reports, please refer to the online Help system.

## Introducing Promodag Reports

Promodag Reports is an advanced and cost-effective reporting tool that enables Exchange Server administrators and IT managers to obtain valuable information about all aspects of their email system.

With its powerful and easy-to-understand features, Promodag Reports produces comprehensive reports that you can rely on to ensure better security, business continuity, and to improve Exchange organization performance.

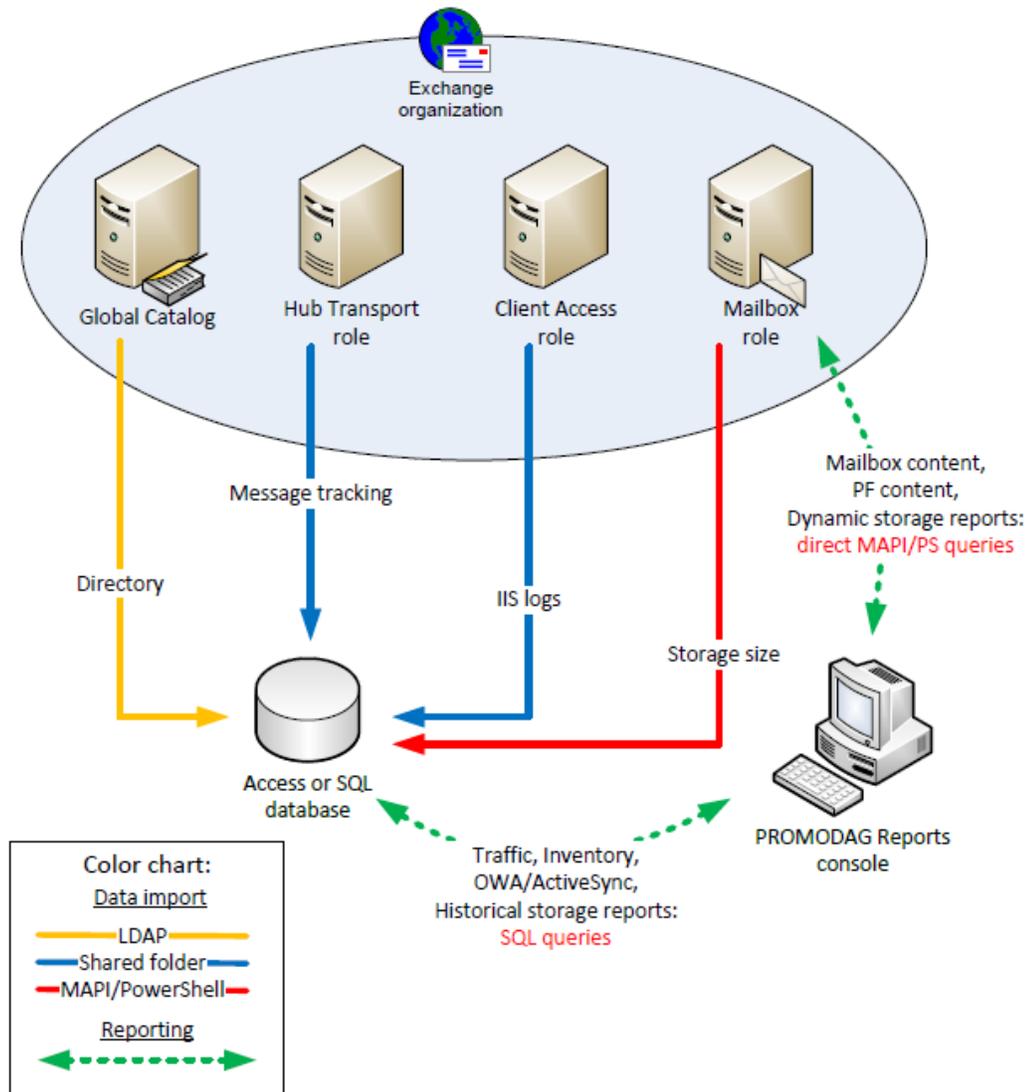
Promodag Reports is easy to install and configure. Reports use native Exchange server data sources; so there is nothing to install on the server. The product collects and stores the necessary data into an Access or SQL Server database. You can choose from over 80 ready-made report templates and publish reports to various destinations in different formats. All operations can be easily automated and scheduled so you can set up the product and forget about it.

## How does it work?

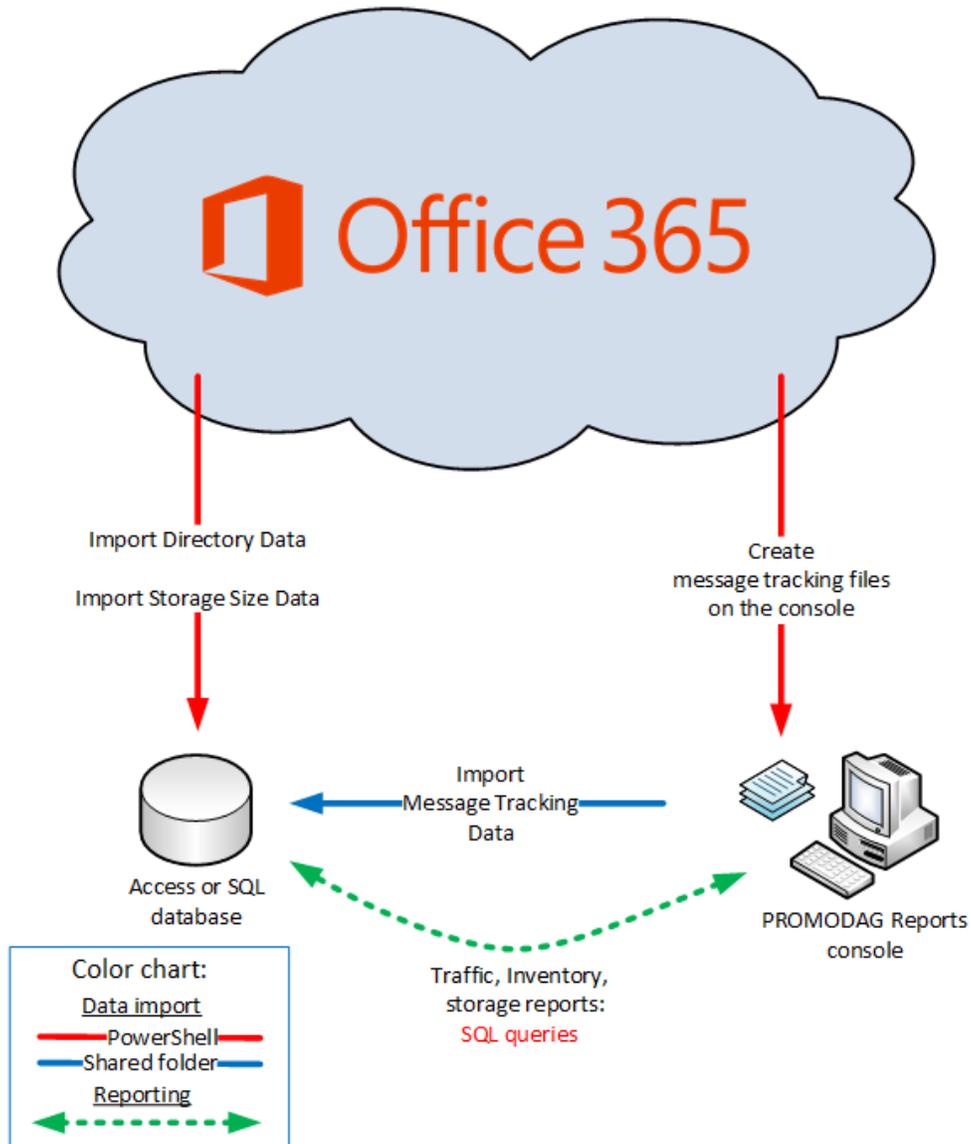
Promodag Reports collects the information it needs from different native Exchange data sources.

- **Traffic reports** are based on Exchange message tracking files previously imported into the database.
- **OWA and ActiveSync reports** are based on IIS log files previously imported into the database.
- **Inventory reports** are likewise based on the information retrieved during directory import.
- On the other hand, **all reports on mailbox/public folder content** directly take their information from Exchange through a dynamic MAPI connection. **Storage size reports** (growth, comparison) are based on imported storage size data.

## On-premises environments: schematic system layout



# Office 365 environments: schematic system layout



## Chapter 1 - Prerequisites

- "Workstation requirements", on page 7
- Required permissions
- "Creating a Promodag account in your Office 365 tenant", on page 8
- "Creating the Promodag account in an On-Premises environment", on page 7
- "SQL Server requirements for Promodag Reports Enterprise edition", on page 9
- "Exchange 2013/2016: Creating an Outlook profile and disabling Cached Exchange Mode", on page 9
- What is the impact on Exchange server performance ?

## A - Microsoft Exchange Server requirements

Promodag Reports supports Microsoft Exchange Server 2007 to Exchange Server 2016 and Office 365 (Exchange Online). It is possible to use the product with a mix of different versions of Exchange.

**You do not need to install anything on the Exchange Server, or to modify anything in your Exchange organization.**

## B - Workstation requirements

The 'Promodag workstation' is the computer on which Promodag Reports is installed.

Promodag Reports can be installed on a machine running a supported desktop or server operating system. It is not recommended to install it on a strategic element of your environment, for example a GC server or an Exchange server.

### 1. Workstation hardware and software requirements

- Computer: A Core i3 Intel Processor with 4 GB of RAM or an equivalent Virtual Machine.
- Disk space: Sufficient disk space to store the database.
- Supported operating systems: Windows Vista/Windows Server 2008 to Windows 10/Windows Server 2016 (32 or 64-bit).
- MAPI: Exchange Server MAPI client and CDO 1.2.1 (up to Exchange 2010) or a 32-bit version of Outlook 2007 to 2016.

If you use Exchange 2013/2016, you will need to create an Outlook profile without Cached Exchange Mode enabled on the machine before starting the initial configuration.

## C - Creating the Promodag account in an On-Premises environment

The 'Promodag account' is the service account that is used to start Promodag Reports. It should be created along with a mailbox.

### 1. Create a user account and a mailbox

Create a new user and a mailbox using the Exchange admin center (EAC) and give it a meaningful name, for example 'ServicePromodag'. The password for this user should never expire.

### 2. Add the user to the right Exchange management role groups

#### **Exchange 2013/2016:**

- In the Exchange Administration Center (EAC), navigate to *Permissions > Admin Roles*.
- Select the Organization Management role group, and then click Edit.
- In the Members section, click Add. Select the users, USGs, or other role groups you want to add to the role group, click Add, and then click OK.
- Click Save to save the changes to the role group.

We recommend that the new user account be added to the **Organization Management** role group.

If this permission level is too high for your company's requirements, you can replace it with **Recipient Management** and **Public Folder Management**.

**Exchange 2010:**

Add the user account into the Organization Management role group using Active Directory Users and Computers tool (ADUC). You will find this group in the Microsoft Exchange Security Group Organizational Unit.

**Exchange 2007:**

- Start the Exchange Management Console tool.
- Right-click *Organization Configuration* and select the *Add Exchange Administrator* option.
- Select the user account used to start Promodag Reports (or the account defined in Server Properties, Security tab and set its role to *Exchange View-Only Administrator*).

### 3. Add the user to the local Administrators group

Follow these steps to add the Promodag account to the local Administrators group:

1. Open Computer Management.
2. In the console tree, click Groups (Computer Management\System Tools\Local Users and Groups\Groups).
3. Right-click the Administrators group, click Add to Group , and then click Add .
4. In the Select Users, Computers, or Groups dialog box, type the name of the Promodag account, and then click OK .

## D - Creating a Promodag account in your Office 365 tenant

Promodag Reports needs an account with sufficient permissions to collect information from your Office 365 tenant. It is possible to use an existing account; however, we recommend creating a dedicated account for that purpose.

### 1. Create a user account

- Sign in to Office 365.
- Go to the Office 365 Admin Center.
- On the Home page, choose Add a user.
- Choose a Display name and a user name.

### 2. Assigning the relevant admin role(s) to the Promodag account

- Sign in to Office 365.
- Go to the Office 365 Admin Center.
- Click Admin > Exchange to open the Exchange Admin Center.
- Click Permissions and open the Admin role tab.
- Click to open the **View-Only Organization Management** role group.
- Click + to add the Promodag account.
- Click Save.

We recommend that the new user account be added to the **View-Only Organization Management** role group.

If this permission level is too high for your company's requirements, you can replace it with **Recipient Management** and **Helpdesk**.

### 3. Allowing multi-factor authentication (MFA)

If your admin has turned on multi-factor authentication for your organization, you will need to generate an app password so Promodag Reports can connect to Office 365.

## D - How to create an app password

- Sign in to Office 365.
- Choose Settings Office 365 > Office 365.
- Choose Security & Privacy > Additional security verification.
- Choose Additional security verification.
- Choose Update my phone numbers used for account security.
- Choose app passwords. At the top of the page, choose App Passwords.
- Choose create to get an app password. If prompted, type a name for your app password, and click Next.
- Choose copy password to clipboard. You won't need to memorize this password.
- Choose copy to your clipboard.

Then open Promodag Reports and paste the app password in the Office 365 configuration tab of Tools > Options.

## E - SQL Server requirements for Promodag Reports Enterprise edition

### 1. Supported versions

Promodag Reports supports Microsoft SQL Server 2005 to SQL Server 2016 (32 or 64-bit).

SQL Server Express (2005 to 2016) may be used with Promodag Reports Enterprise edition; however, database size is limited depending on the version (10 GB for SQL Server 2008 R2/2016 Express and 4 GB for SQL Server 2005/2008 Express).

### 2. Permissions

The Promodag account must have been granted the **db\_owner** role on the Promodag Reports database. It must also have the **public** and **db\_datareader** roles on the TEMPDB database.

The ability to create databases requires specific SQL permissions (CREATE DATABASE).

## F - Exchange 2013/2016: Creating an Outlook profile and disabling Cached Exchange Mode

Cached Exchange Mode creates a self-synchronized copy of your messages that are stored on both the server and your client. To let Promodag Reports establish a connection to Exchange 2013/2016, you must create an Outlook profile for the mailbox matching the PROMODAG account, and then disable that specific feature.

### 1. How to create a new Outlook profile

- In Control Panel, click or double-click Mail (32-bit).
- Click Show Profiles.
- Click Add.
- Type a name for the new profile, and then click OK.
- Make sure the email address of the PROMODAG account is selected. If this is not the case, enter it in the Email address field.
- Click Next.
- Click Finish.

Note: The Mail (32-bit) icon appears after Outlook starts for the first time.

## 2. How to disable Cached Exchange Mode for an Outlook profile

- In Control Panel, click or double-click Mail (32-bit).
- Click Show Profiles.
- Select the Outlook profile for the mailbox matching the PROMODAG account, and then click Properties.
- Click E-mail Accounts.
- In the Accounts settings window, click Change.
- Under Offline settings, unselect the 'Use Cached Exchange Mode' check box.
- Click Next.
- Click Finish.

See also: "Setting up a connection to Exchange", on page 18.

## 3. Initializing an Outlook profile

Once the Outlook profile has been created, launch Microsoft Outlook using it and open at least one public folder. It will add to the profile the item required by Promodag Reports to access public folders.

# Chapter 2 - Getting started

## A - Evaluating the product

You may evaluate Promodag Reports for a period of up to **45 days** from first installation. The only other limitation is that your reports on e-mail traffic or OWA and Active Sync activity can only cover a maximal period of **15 consecutive days**.

You can indeed only import up to 15 consecutive days of Exchange message tracking files or IIS log files in evaluation mode, which explains the latter restriction.

There is no limitation to the number of report templates you can use - all options being available - during your 45-day evaluation period.

## B - Installing the application

Note: Please make sure that your workstation complies with all points listed in "Workstation requirements", on page 7 before proceeding with the installation process.

### Installing Promodag Reports

- a. Go to <https://www.promodag.com/> to download PROMODAG Reports.
- b. Choose a temporary directory to store the installation package.
- c. Double-click the installation package to start the installation process.
- d. Simply follow the instructions of the installation wizard.

For more information about default paths for installation and settings, see the help file.

# C - Initial setup

## Starting the application

From the Start Menu, select Programs > Promodag > PROMODAG Reports 10 to start Promodag Reports.

You will first be prompted to select the type of Exchange organization you wish to analyze.

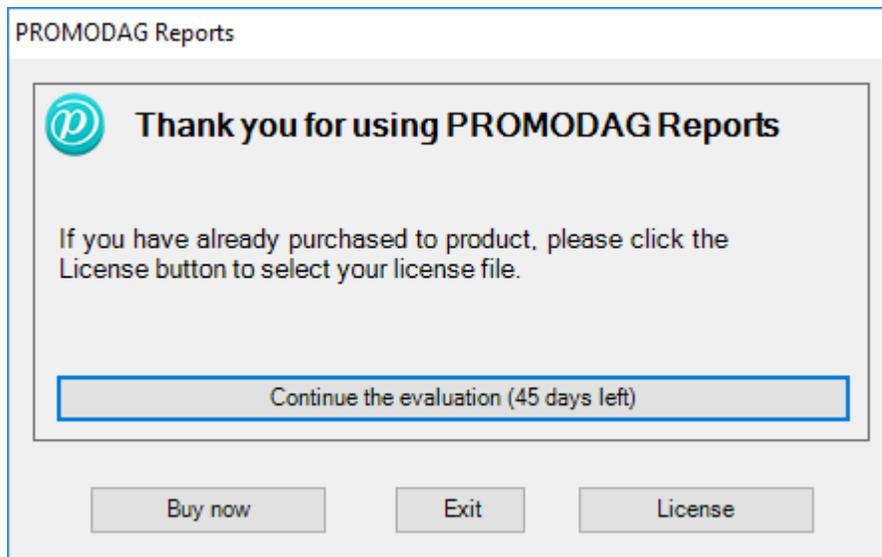
The configuration wizard provides a user-friendly interface to start with PROMODAG Reports. It automatically appears when you run the software for the first time, and guides you through the first configuration of the product.

It provides you with instructions on:

1. Evaluating or licensing the product,
2. Creating a new PROMODAG Reports database,
3. Configuring a connection to the directory,
4. Configuring a connection to your Office 365 tenant (Hybrid deployment),
5. Selecting data sources to import depending on the reports you need:
  - a. Message tracking files,
  - b. Internet Information Services log files,
  - c. Storage size:
    - Mailbox size,
    - Database size,
    - Mailbox count per database,
    - Public folder size,
6. Starting the data import process.

## 1. Evaluating or licensing the product

This window lets you carry on using Promodag Reports in evaluation mode, or apply a valid license to the database.



## 2. Creating a new Promodag Reports database

Promodag Reports requires a database in order to store the data it collects from Microsoft Exchange. It will then use this data to generate reports. It is possible to create multiple databases.

To create a new database, select the type of your messaging environment, and the type of database that best suits your needs.

### **Exchange Organization type**

- On-Premises: Administrators run the messaging system on their own servers, in their own company.
- Hybrid deployment: This is a mixed environment: part of the messaging system is hosted in an Office 365 tenant, but the company has kept some Exchange servers on-premise.
- Office 365: The messaging system is hosted by Microsoft. Microsoft Exchange Online is an email, calendar and contacts solution delivered as a Cloud service and it is part of the Office 365 suite.

Select On-Premises or Hybrid deployment depending on your messaging environment.

### **Database type**

#### **Microsoft Access**

- Best suited for small Office 365 tenants (less than 1,000 mailboxes).
- Usable with all editions of Promodag Reports.
- The physical size limit set by Microsoft to Access 2000 database files is 2 GB (2,048 MB).
- Installing Microsoft Access is not required.
- The database file should be located on the same computer as Promodag Reports.

#### **Microsoft SQL Server**

- Best suited for medium or large Office 365 tenants (more than 1,000 mailboxes).
- Requires the Enterprise edition of Promodag Reports.
- The database size is only limited by disk space on the SQL Server.
- Multi-user access.
- Performance is determined by the power of the SQL server.
- An additional SQL Server license (not provided) may be required.

The Access format is recommended for evaluating the product, for it does not require anything else.

Choose a name for your database. For SQL, enter the name of the server without \\, and then the name of the instance if applicable.

Click the *Next* button to confirm your settings and move on to the next step.

Initial Configuration Wizard

### Creation of the database

PROMODAG Reports requires a database in order to store the data it collects from [native Exchange data sources](#). It will then use this data to generate reports. It is possible to create multiple databases.

General | Advanced options

Exchange Organization type ([more](#)):

- On-Premises
- Office 365
- Hybrid deployment

Database type:

- Microsoft Access: Database size limited to 2 GB ([more](#)).
- Microsoft SQL Server ([more](#)). Requires an Enterprise license of PROMODAG Reports

Server name:

Database name:

Authentication:

Login:

Password:

Description:

< Back    Next >    Cancel    Help

### 3. Configuring a connection to the directory

Note: This step does not appear if you have chosen to analyze a type of organization that does not requires a connection to the directory, that is 'Office 365'.

Promodag Reports attempts to automatically discover a Global Catalog server, and then to establish a connection using LDAP.

The product needs specific permissions to connect to the directory to retrieve the structure of the Exchange organization, and all Exchange-related objects. Click the *Next* button to confirm your settings and move on to the next step.

The screenshot shows a window titled "Initial Configuration Wizard" with a header that reads "The Wizard needs to know your parameters to establish a Directory connection." The main area contains a form with the following elements:

- A text box for "Global Catalog server:" containing the value "GlobalCatalog.Promodag.fr" and a "Suggest a server" button.
- Instructions: "Choose an administrative account to access the directory. With Exchange 200x a specific Exchange administrator account is required to import deleted objects."
- Two radio buttons: "Current account (PROMODAG\Service\_SupportEmail)" which is selected, and "Specific account".
- Fields for "User name:", "Password:", and "Domain:" with corresponding text boxes.
- A "Check account (not tested)" button next to the user name field.
- A blue underlined link: "[Check connection \(not tested\)](#)".

At the bottom of the window are four buttons: "< Back", "Next >", "Cancel", and "Help".

### 4. Configuring a connection to your Office 365 tenant

Enter the credentials of the account you created for using with the product, see "Creating a Promodag account in your Office 365 tenant", on page 8.

Click the *Next* button to confirm your settings and move on to the next step.

The screenshot shows a window titled "Initial Configuration Wizard". The main heading reads "The Wizard needs to know your parameters to establish a connection to Office 365." Below this, there is a message: "To establish a connection to your Office 365 tenant, please enter the credentials of an Office 365 admin account that is a member of the 'View-Only Organization Management' role group. Click [this link](#) to see how to create this administrator account." There are two input fields: "User name:" with the text "ServiceAdmin@organization.onmicrosoft.com" and an example "Example: admin@acme.onmicrosoft.com"; and "Password:" with a masked field of asterisks. A blue link "Check connection (success)" is visible. At the bottom, there are four buttons: "< Back", "Next >", "Cancel", and "Help".

## 5. Selecting data sources to import depending on the reports you need

### Message tracking files

Promodag Reports will use this data source to generate traffic reports. Select the servers whose message tracking files will be imported. The default date range covers the last 7 days.

You may specify the period to be imported:

- Import from: Date of the first message tracking file to import.
- To: Date of the last message tracking file to import.

Click the *Next* button to confirm your settings and move on to the next page. The location of message tracking files will be tested on each selected server.

Data Source Configuration Wizard

**Data sources for traffic reports**

Select the servers and the period for which you want to produce reports on e-mail traffic.

Available server(s): 4

- BRAGI (7/1/2017)
- Edge2016 (7/13/2017)
- IVAR (7/1/2017)
- TARANIS (7/1/2017)

Selected server(s): 6

Server	Last import	Next import
Office 365		7/13/2017
HEL		7/13/2017
JORD		7/13/2017
LOKI		7/13/2017
TOUTATIS		7/13/2017
VAR		7/13/2017

[Set Import Options...](#)

Import from:  To:

## IIS log files

Promodag Reports will use this data source to generate OWA and ActiveSync reports. Select the servers whose IIS log files will be imported. The default date range covers the last 7 days.

You may specify the period to be imported:

- Import from: Date of the first message tracking file to import.
- To: Date of the last message tracking file to import.

Click the *Next* button to confirm your settings and move on to the next page. The location of IIS log files will be tested on each selected server.

Data Source Configuration Wizard

### Data sources for OWA and ActiveSync reports

Select the servers and the period for which you want to produce reports on OWA and ActiveSync activity.

Available server(s): 6

- Office 365 (7/1/2017)
- Edge2016 (7/1/2017)
- HEL (7/1/2017)
- IVAR (7/1/2017)
- LOKI (7/1/2017)
- TARANIS (7/1/2017)

Selected server(s): 4

Server	Last import	Next import
BRAGI		7/13/2017
JORD		7/13/2017
TOUTATIS		7/13/2017
VAR		7/13/2017

Set Import Options...

Import from: Thu 13 Jul 2017 To: Wed 19 Jul 2017

< Back Next > Cancel Help

## Storage size

Promodag Reports will use this data source to generate storage size reports. Select the servers whose storage size (mailbox and public folder size, Exchange database size) will be imported.

Click the *Next* button to confirm your settings and move on to the next page. The location of mailbox and public folder databases will be tested on each selected server.

Data Source Configuration Wizard

### Data sources for storage size reports

Select the servers for which you want to produce reports on storage.

Available server(s): 3

- BRAGI
- Edge2016
- TOUTATIS

Selected server(s): 7

Server	1.	2.	3.	4.
Office 365	X			X
HEL	X	X	X	X
IVAR	X	X	X	X
JORD	X	X	X	X
LOKI	X	X	X	X
TARANIS	X	X	X	X
VAR	X	X	X	X

Server Properties

Mailbox size  
 Database size  
 Mailbox count per database  
 Public Folders size

< Back Next > Cancel Help

## 6. Starting the import data process

For more information about these options, please refer to our Online help.

### Processing imports

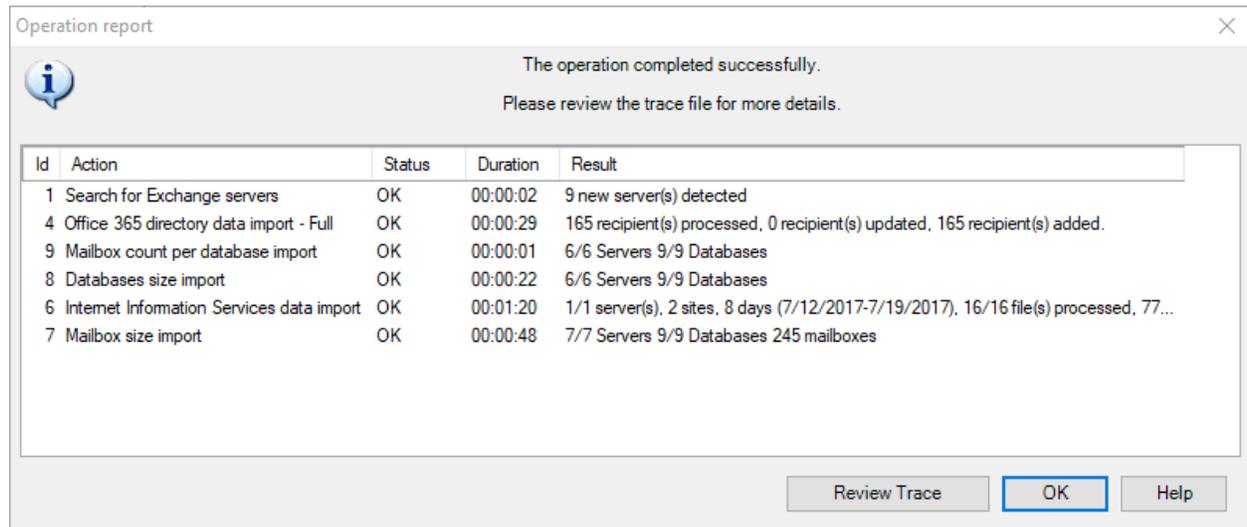
Click the *Finish* button to start importing data. The complete process includes all previously configured steps, and can take some time depending on your selections.

Note: Import options may be saved in a batch file, so that the import process can be automated and scheduled at your convenience. See Automating and scheduling the collection of data and other actions .

#### Promodag Reports

1. Imports recipients from the directory/the Office 365 tenant,
2. Creates message tracking files (Office 365),
3. Imports message tracking data,
4. Imports IIS data,
5. Imports storage size data.

Each operation finishes off by displaying an operation report dialog box. A trace file is also recorded and can be used to troubleshoot possible errors or resolve various configuration issues. If you need to do so, use the Consult Trace Files option to view the content of the last trace files.



## D - Setting up a connection to Exchange

The Configuration Wizard automatically detects connection settings to Exchange in most situations. These parameters allow Promodag Reports to establish a dynamic connection to the messaging system using MAPI. They can be viewed and updated in the Exchange Connection tab of Tools > Options, On-Premises configuration.

### 1. Exchange 2007/2010

Promodag Reports should automatically detect your connection settings to Microsoft Exchange if you run Exchange 2007 or 2010 and if all the conditions listed in the requirements and recommendations topics are met:

- A supported version of MAPI is installed on the computer;
- The user account that runs the application has been granted sufficient permissions;
- This user account has a mailbox.

Options

General Reports Organization type On-Premises configuration Email Export Trace & Alert Advanced

Directory Connection Exchange Connection PowerShell Connection

Choose an account to use for Exchange Server access (mailbox and public folder size and content retrieval)

Current account (PROMODAG\Service\_SupportEmail)

Specific account — Click [here](#) for more information.

User name:  Check account (success)

Password:

Domain:

[Check permissions \(success\)](#)

Exchange 2003/2007/2010  Default connection

Select a mailbox associated with the above account

Mailbox:

Alias: Service\_SupportEmail

Exchange Server: VAR [Check connection \(success\)](#)

Exchange 2013/2016  Default connection

Select an existing profile:

Mailbox:  [Check connection \(not tested\)](#)

MAPI: Outlook 2013 (15.0.4859.1000)

[Check configuration \(not tested\)](#)

## 2. Exchange 2013/2016

Three additional steps are required if you run Exchange 2013/2016 and if the mailbox that matches the Promodag account is hosted on an Exchange 2013/2016 server:

1. You must first create an Outlook profile for it, and then disable Cached Exchange Mode. For a detailed procedure, see "Exchange 2013/2016: Creating an Outlook profile and disabling Cached Exchange Mode", on page 9.
2. Then, open Outlook using that profile and access the mailbox and public folders to initialize it.
3. Finally, select Exchange 2013 as default connection, and select the Outlook profile you created at the previous steps.

Options

General Reports Organization type On-Premises configuration Email Export Trace & Alert Advanced

Directory Connection Exchange Connection PowerShell Connection

Choose an account to use for Exchange Server access (mailbox and public folder size and content retrieval)

Current account (PROMODAG\Service\_SupportEmail)

Specific account — Click [here](#) for more information.

User name:  Check account (success)

Password:

Domain:

[Check permissions \(success\)](#)

Exchange 2003/2007/2010  Default connection

Select a mailbox associated with the above account

Mailbox:  [Suggest a mailbox](#)

Alias:  [Resolve name](#)

Exchange Server:  [Check connection \(not tested\)](#)

Exchange 2013/2016  Default connection

Select an existing profile:

Mailbox:  [Check connection \(success\)](#)

MAPI: Outlook 2013 (15.0.4859.1000)

[Check configuration \(not tested\)](#)

### 3. Mixed environment

If you run Exchange 2013/2016 and one or more previous versions of Exchange - for example Exchange 2013 and Exchange 2007/2010 - then follow these steps:

1. Setup the connection to Exchange 2013 as described in the previous paragraph.
2. Create a new service mailbox on Exchange 2007 or 2010. Grant the Promodag account full access to that mailbox.
3. Enter the display name of that new mailbox in the 'Mailbox' field and click the 'Resolve name' button.

The application is now able to connect to all mailboxes, regardless of the version of Exchange they are on.

## Chapter 3 - Using reports

### A - How to find your way?

Promodag Reports includes about 80 report templates that you can use to create your own custom reports.

#### 1. Report templates

To open a template, you can either

1. Use the Templates menu.
2. Use the Report Explorer, on the left pane of the main window. It can be hidden or displayed by clicking the  icon.

Before you start using the product, we suggest you to open our List of reports templates on our website.

Templates are grouped in categories, such as **Storage**, **Mailbox Content** or **Billing** for example. These categories appear as main nodes in the Report Explorer and they cannot be modified. The names of these categories are meant to help you find your way among templates. Each entry comes with a short description.

Graphical reports are distinguished from tabular reports in the **Templates** menu as well as in the Report Explorer by a specific  icon.

#### EXAMPLE

- A template that would let you generate a report showing the size of public folders is likely to be found in the category called **Storage**. If you open that category, you will find a template called Public Folder Storage Information.
- Should you likewise need to produce a report showing the top 10 email senders in your organization, open the category called **Mailbox Traffic**. If you open that category, you will find a template called Mailbox by Traffic Level.

## 2. Canned reports (Favorites)

The software is delivered with a number of ready-to use custom reports, for example: 'What are the 10 largest mailboxes'. These canned reports are available on the Favorites menu and they are grouped in custom categories based on the main use cases of the product: **Traffic Analysis and SLA Reporting, Compliance, Capacity Planning and Exchange Migrations, Chargeback**.

You can rename these sample reports or delete them at will. You can also rearrange the existing tree, or create your own hierarchy in the **Favorites** menu.

## B - Creating new custom reports

### 1. Selecting a valid reporting period

#### Period tab and data sources

Many report templates include a Period tab: all traffic reports, OWA and ActiveSync reports and some reports on storage size. These templates share in common the use of data that must previously be imported into the database.

#### What reporting period can be selected?

The time range you select in the **Period** tab must always be covered by matching data imports.

#### EXAMPLE

Requesting a report on mailbox traffic for January until June last year will not work if you have only started to import message tracking files of this year. If you do so, you will get a message to inform you that 'No data was found for the selected period'.

Note: In evaluation mode, it is only possible to import 15 days of data: as a consequence, it is also only possible to report on that same time period.

For more information on the limitations of the evaluation mode, see "Evaluating the product", on page 10.

## 2. Selecting objects or recipients

### Selection tab and directory objects

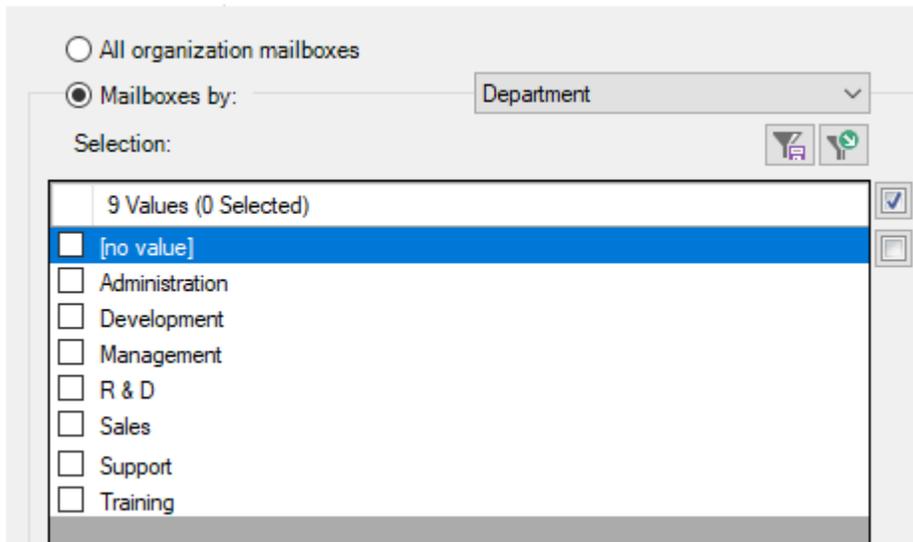
All report templates include a **Selection** tab. This feature lets you include directory objects or recipients whose traffic, content or storage must be displayed in the report.

A directory object can be a server, or an Exchange database; it can also be a recipient, for example a mailbox or a distribution group.

Directory objects are imported with most of their attributes into the database, which lets you select them using the attribute of your choice in the **Selection** tab.

### EXAMPLE

Mailboxes can be selected by country, or department, or company.



### What objects can be selected?

Each report template focuses on a specific aspect of the messaging system. As a consequence, the available **Selection** tabs differ depending on the scope of the report template.

### EXAMPLE

A report template focused on mailbox traffic will let you select mailboxes, whereas a report template dedicated to public folder content will let you select public folders only.

Some transverse templates like Find Specific Messages, that is focused on messages, will let you select different recipient types: mailboxes, or distribution groups, or public folders.

### Excluding objects

Click the  **Exclude >>** button to exclude directory objects or recipients from the report using the same principle.

## 3. Selecting correspondents

The 'correspondents' are those who sent messages to, or received messages from your selection of recipients.

The vast majority of traffic report templates include a **Correspondents** tab. This feature lets you filter the correspondents of the recipients previously selected in the **Selection** tab.

The most usually available option allow you to select correspondents by address type.

- To select all internal correspondents, select: Administrative group, Like, \*
- To select all external correspondents, select: Internet domain, Like, \*
- To select all application agents, devices etc. that have an SMTP address but no mailbox, select: Unidentified local address, Like, \*
- To select all address types that are not listed above, select: Others, Like, \*

## EXAMPLE

You may want to select correspondents from specific SMTP domains, for example the gmail.com, yahoo and hotmail correspondents of the selection of mailboxes you have just checked in the **Selection** tab.

The screenshot shows a web interface for selecting correspondents. At the top, there are two radio buttons: "All address types" (unselected) and "Some types" (selected). Below this is a "Selection:" label with two filter icons. The main part of the interface is a table with the following data:

Address type	Operator	Value
Internet domain	Like	gmail.com
Internet domain	Like	yahoo*
Internet domain	Like	*hotmail*
▶*		...

Reports templates from the Internal Message Delivery group let you select correspondents by recipient type, for example Mailbox or Server.

## EXAMPLE

You may want to select a specific group of mailboxes, or some specific servers, to analyze the delivery time of messages they received from the specific group of mailboxes, or specific servers you selected in the **Selection** tab.

The screenshot shows a web interface for selecting correspondents. At the top, there are two radio buttons: "All organization mailboxes" (unselected) and "Mailboxes by:" (selected). Below this is a dropdown menu with "Company" selected. The main part of the interface is a "Selection:" label with two filter icons. Below this is a list of mailboxes with checkboxes:

7 Values (0 Selected)

- [no value]
- Promodag
- Promodag Andorra
- Promodag Gmbh
- Promodag Ltd
- Promodag SA
- Promodag USA

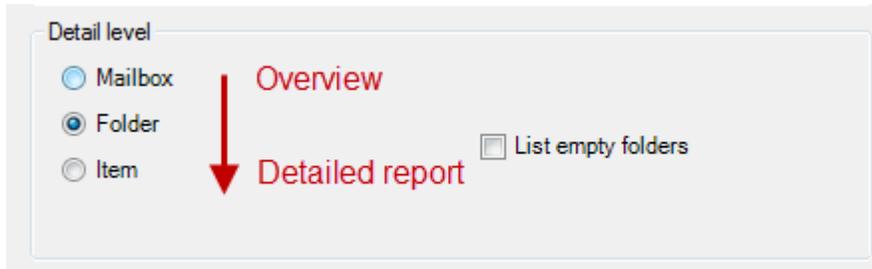
Some specialized reports such as Find Specific Messages allow a larger selection of correspondents: not only is it possible to select correspondents by address type, but also by recipient type or even an individual SMTP address.

## 4. Selecting the right detail level

Many report templates include a **Content** tab with *Detail level* options. This feature is aimed at focusing the report at different levels.

### EXAMPLE

A report template on mailbox content such as General Mailbox Content includes three detail levels: Mailbox, Folder, Item. If you select Mailbox, it will only display the mailbox name and a total item count and size, whereas it would display a list of items within the mailboxes you selected if you had selected Item.



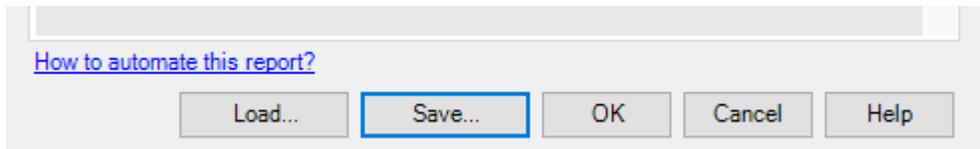
The same principle applies to all other templates that have a *Detail level* option: the more you go down the list, the more detailed the report will be.

## C - Saving custom reports

### 1. Saving and reloading a report with its options

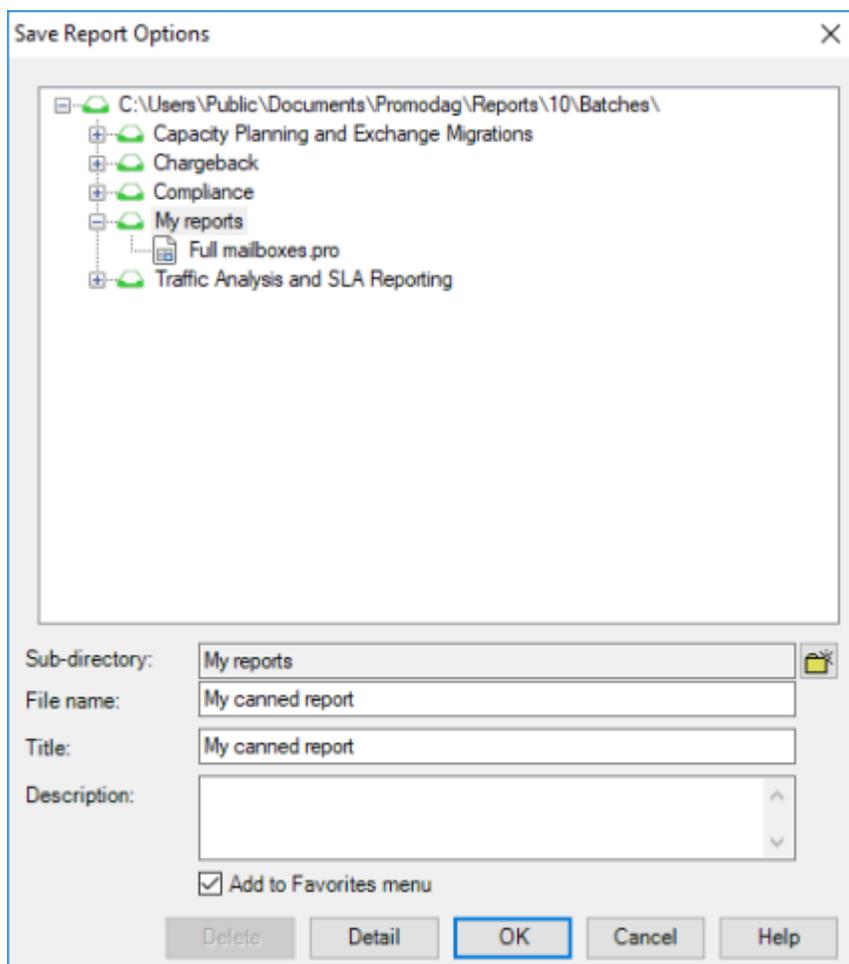
To create and save a new custom report, select a report template from the Templates menu, and select the options of your choice. You may also record specific selection settings separately if you plan to reuse them in other reports.

- Click the *Save* button at the bottom of the report interface to save the option file.
- Click the *Load* button to reload it once the report interface is open.



### 2. Adding a report to the Favorites

Make your own custom reports available in the Favorites menu by selecting the 'Add to Favorites menu' check box before saving them.



## D - Previewing, exporting, publishing and e-mailing reports

A report can either be previewed on screen, exported to various file formats, published to a SharePoint document library or automatically attached to an e-mail and sent to a recipient of your choice.

### 1. Previewing reports

The default output is 'Screen'. It is recommended to use it when generating a report for the first time, so that you can reload your options and adapt them if necessary.

### 2. Exporting reports

Use the File > Export Report option once the report is available for preview on screen.

#### Available formats

Reports can be exported to different file formats: CSV, PDF, XLS, XLSX, RTF, HTML, MHT.

### 3. Publishing reports

You can export reports

- To your Intranet: Export reports as PDF or HTML files to the web root of your intranet.
- To a public folder: Select the 'Exchange folder' output option.

- To SharePoint: Select the SharePoint output option. The default server and document library can be selected in the Export tab of Tools > Options.

## 4. E-mailing reports

All reports can be emailed to specific recipients, by selecting the Email output option. Moreover, the Compose For... tab allows you to email reports to all mailboxes selected in the report.

# Support

This page provides an overview of Promodag's support resources for our existing users and newcomers evaluating the product. Alongside a suite of on-line resource tools focused on addressing common user issues, we also provide a dedicated support system.

## Self-help resources

The quickest starting point for your support needs is to consult our on-line resource tools on our support page (<https://www.promodag.com/support>).

## Submitting a Support Request

Our customer support team will respond to requests from both users evaluating the product and customers with a valid maintenance contract.

Support requests can be submitted either ...

- Via our contact form: <https://www.promodag.com/contact-us/>
- Via email at [support@promodag.com](mailto:support@promodag.com) or use Help > Technical Support Request from the product's menu system.
- Or by phone: +33 1 53 27 66 60 or Toll Free (from USA only): 1(888) 696-5404.

We normally respond within 2 hours, but please allow 24 hours for us to respond to account for differences in international time zones.

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