



PROMODAG REPORTS 14

Getting started

Office 365

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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

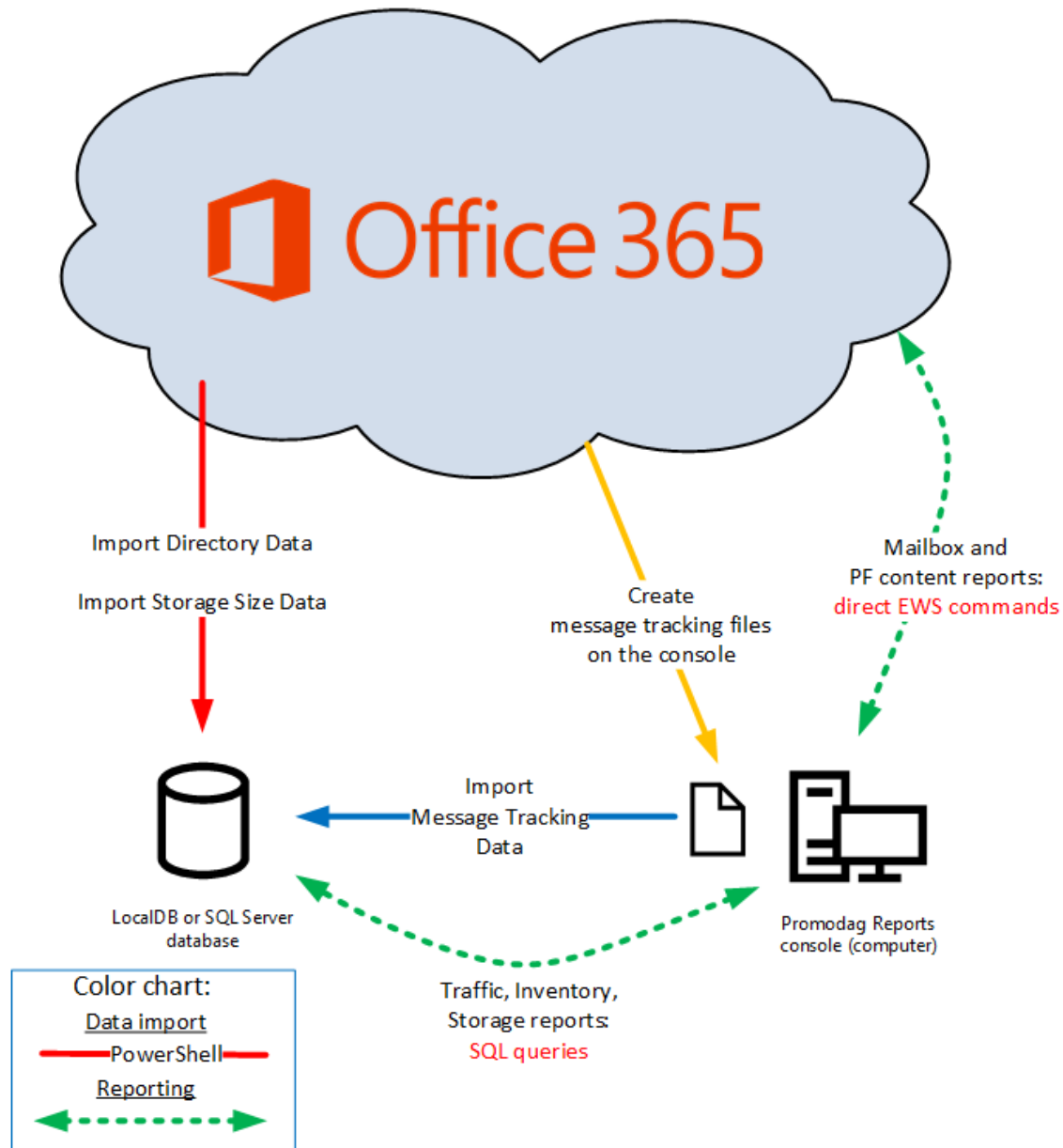
Promodag Reports is an advanced and cost-effective reporting tool that enables administrators and IT managers to obtain valuable information about all aspects of their email system.

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 get a better understanding on the email activity within your organization.

Promodag Reports is easy to install and configure. Reports use native Office 365 data sources. The product collects and stores the necessary data into a SQL Server Express LocalDB or SQL Server database. You can choose from over 30 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?

Office 365 environments: schematic system lay-out



Chapter 1 - Prerequisites

A - Computer requirements

The 'Promodag computer' 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 - Computer hardware and software requirements

- Computer: A Core i3 Intel Processor with 4 GB of RAM or an equivalent Virtual Machine.
- Supported operating systems: A 64-bit version of Windows 10/Windows Server 2016 to Windows 11/Windows Server 2022. Core versions of Microsoft Windows Server are not supported.
- The Windows Remote Management (WS-Management) service should be enabled and set to Automatic (Delayed Start).

2 - Internet access

The computer must have access to the Internet and the endpoints whose list is regularly updated by Microsoft must be reachable for customers using Office 365 plans, including Government Community Cloud (GCC).

B - Certificate-based authentication to Office 365

If your company's security policy doesn't allow you to use an account and password to access Office 365 or if you use MFA, you can skip the **User-based authentication** mode and use the **Certificate-based authentication** mode instead. You can make this choice in the Configuration Wizard or in the Office 365 configuration tab of **Tools > Options**.


1. Create the certificate and the Promodag Reports Application

Please follow these steps to create the Promodag Reports Application, the certificate, register them in Microsoft Entra ID and create a dedicated role group in Exchange Admin Center:

Prerequisites

The computer's operating version must be greater than or equal to Windows 10/Windows Server 2016. Microsoft PowerShell 7 or higher is required.

The ExchangeOnlineManagement and Microsoft.Graph PowerShell modules should be installed on the computer. If they are not, please proceed with these steps:

1. Click  and search for PowerShell > Windows PowerShell 7 and run it as administrator.
2. Install the ExchangeOnlineManagement module: [Install-Module ExchangeOnlineManagement -Scope AllUsers](#)
3. Install the Microsoft.Graph module: [Install-Module Microsoft.Graph -Scope AllUsers](#)

Create the certificate and application using the provided script

These steps will enable you to create a self-signed certificate, an application in Microsoft Entra ID to access your tenant, and a role group in Exchange Admin Center.

Getting started with Promodag Reports

1. The script is delivered by default in the C:\Users\Public\Documents\Promodag\Reports\ directory but you can use it from a different location (download link).
2. Run the script: [.\CreateRepexRBACApp.ps1](#)
3. Enter certificate password at prompt and write it down.
4. The script will proceed, and you will be prompted to sign-in to Office 365 to create the role group and grant it the relevant permissions. Use a Global Administrator account.
5. A certificate valid for two years has now been created in the script directory with the name "RepexRBACAppCertificate.pfx". The application has been created in Microsoft Entra ID with the name "Promodag Reports RBAC Application", a role group with the name "Promodag Reports RBAC Role Group" has been created in Exchange Admin Center, a service principal object has been created for this new application and it has been added as a member of this new role group.
6. The script displays the summary information to be used in Promodag Reports: Application ID and certificate path, plus a link (*Authorization URL*) to connect to Microsoft Entra ID and authorize the newly created application. This information is then saved into a file in the current directory.

```
[INFO] Check Windows version: OK
[INFO] Check Microsoft Graph module: OK
[INFO] Check ExchangeOnlineManagement module: OK
Input certificate password, please: *****
[INFO] MS Graph connection established.
[INFO] Creating the client application (Promodag Reports RBAC Application)
[INFO] Creating the Service Principal for the client application (Promodag Reports RBAC Application)
[INFO] 'Administrator@promodagdev.onmicrosoft.com' added as an application owner to app 'Promodag Reports RBAC Application'
[INFO] Done creating the client application ()
[INFO] Getting API permissions for Microsoft Graph, Microsoft 365 Exchange Online, Microsoft 365 SharePoint Online
[INFO] Adding permissions...
[INFO] Please connect to Exchange Online.
[INFO] Exchange Online connection established.
[INFO] Role Group created.
[INFO] Service Principal created.
[INFO] Service Principal added to the Role Group.

=====
Your Promodag Reports application and certificate has been successfully generated.
=====

Tenant domain: promodag.dev
Tenant ID: 4b8d6c597-b53d-4f39-baee-8a07a0a07a0a
Application name: Promodag Reports RBAC Application
Application ID: 4b8d6c597-b53d-4f39-baee-8a07a0a07a0a
RoleGroup name: Promodag Reports RBAC Role Group
Service Principal name: SP for Promodag Reports RBAC Application
Certificate file: .\RepexRBACAppCertificate.pfx
Certificate expiration: 06/06/2026 18:34:12

Copy the below URL and paste it into your browser to grant permission to the application:
URL: https://portal.azure.com/blade/Microsoft_AAD_RegisteredApps/ApplicationMenuBlade/CallAnAPI/appId/e4b8d6c597-b53d-4f39-baee-8a07a0a07a0a/permissions/15674083d0b0-4273-8496-838612408577?ui=enApp/

A summary of these information has been saved in .\RepexRBACAppCreation.log
```

2. Authorize this new application in Microsoft Entra ID

Grant admin consent

1. Paste the URL displayed in a web browser to connect to Microsoft Entra ID. Sign in using a Global Administrator account. The Promodag Reports RBAC Application | API permissions page opens.
2. Click **Grant admin consent for <name of your Office 365 tenant>**.
3. Review the permissions granted to the application (see the help file for detailed information).

Optional: You can delete the self-signed certificate and use your own if you prefer. See the help file on how to do it.

3. Apply "Promodag Reports RBAC Application" settings to Promodag Reports

Please make sure that you have retrieved the following information the first step:

- Application ID,
 - Certificate path,
 - Certificate password.
1. In Promodag Reports, go to **Tools > Options**, Office 365 configuration.
 2. Select Certificate-based authentication.

3. Enter the Application ID, Certificate file path and Certificate password in the corresponding fields.
4. Click the [Check validity](#) link to verify the certificate expiration date.
5. Click the [Check connection](#) links to verify that Promodag Reports can connect to your tenant using the Microsoft Entra ID application and the certificate.

4. If you have already created the Promodag Reports application and wish to grant it minimum permissions

Step 1 Remove the Global Reader role

1. Open the Azure AD portal at <https://portal.azure.com/>.
2. Under Manage Microsoft Entra ID, click **View**.
3. On the Overview page that opens, under Manage, select **Roles and administrators**.
4. In the search field, enter the name of the Global Reader role.
5. Select the Global Reader role.
6. Remove the Promodag Reports Application from the assignments.

Step 2: Retrieve the Promodag Reports Microsoft Entra ID application identifiers

1. Open the Azure AD portal at <https://portal.azure.com/>.
2. Under Manage Microsoft Entra ID, click **View**.
3. On the Overview page that opens, under Manage, select **Enterprise applications**.
4. Uncheck Application type == **Enterprise Applications** next to the Search by application name field.
5. In the search field, enter the name of the existing custom Promodag Reports application (default: "Promodag Reports Application").
6. In Properties, write down the Application ID and Object ID. This will be used later.

Step 3: Create an Exchange Admin role group for Promodag Reports

1. Go to Microsoft 365 admin center, Exchange admin center.
2. Expand Roles on the left and click Admin roles.
3. Click Add role group.
4. In the New role group window that appears, enter "Promodag Reports role group" as the name of the role group along with a description.
5. Click **Next**.
6. In the Add permissions window, select View-Only Recipients and Mail Recipients.
7. Click **Next**.
8. Role group assignment will be performed in the next step. So, click **Next** again then **Add role group** to create the Role group.

Step 4: Create Management Role Assignment

In a PowerShell 7 window, connect to Exchange Online PowerShell.

Create a service principal object for the Promodag Reports Microsoft Entra ID application

```
$SP = New-ServicePrincipal -AppId <appId from step 2> -ObjectId <Object id from step 2> -DisplayName "SP for Promodag Reports Application"
```

Add the service principal as a member of the custom role group:

```
Add-RoleGroupMember -Identity "Promodag Reports role group" -Member $SP.Identity
```


Getting started with Promodag Reports

Then go to "Apply "Promodag Reports RBAC Application" settings to Promodag Reports", on page 7.

C - User-based authentication to Office 365

Promodag Reports can collect information from your Office 365 tenant through a user with specific permissions. It is possible to use an existing account; however, we recommend creating a dedicated user for that purpose. This account must not be subject to multi-factor authentication (MFA). You can make this choice in the Configuration Wizard or in the Office 365 configuration tab of **Tools > Options**.

1. Create a user account for Promodag Reports

- Sign in to Microsoft 365 Admin Center as an administrator.
- Click **Users > Active users** and select Add a user.
- Choose a Display name and a user name, for example 'Promodag user'.

2. Assigning the appropriate roles to the Office 365 Promodag user

- Sign in to Microsoft 365 Admin Center as an administrator.
- Click **Admin > Exchange** to open the Exchange Admin Center.
- Click **Roles > Admin roles** and then click **Add role group**.
- In the Set up the basics window that appears, enter a name and a description pour this new group, for example 'Promodag Reports Role Group'.
- In Permissions, select the Mail Recipients and View-Only Recipients roles.
- In Admins, add the Promodag user.
- Click **Add role group**.

3. Allowing reports on mailbox content

Some additional conditions must be met to allow Promodag Reports to retrieve the content of mailboxes when running the reports of the Mailbox Content category:

- The Promodag user must be assigned a user mailbox and therefore an Office 365 license.
- Grant the ApplicationImpersonation role to the Office 365 Promodag user. To assign this role, please edit the role group created at the previous step, open the Permissions tab and add the ApplicationImpersonation role.
- If you use Modern Authentication with Office 365, authorize Promodag Reports in Microsoft Entra ID. To perform this task, open the application, go to Tools > Options, test your connection in Office 365 configuration and follow the instructions provided .

Note: In February 2024, Microsoft announced that the ApplicationImpersonation role would be removed from the Exchange Online user interface in May 2024, while its complete removal is scheduled for February 2025. The only solution will be to switch to Certificate-based authentication.

D - SQL Server requirements for Promodag Reports Enterprise edition

1. Supported versions

Promodag Reports supports all editions of Microsoft SQL Server from SQL Server 2012 to SQL Server 2022.

SQL Server Express (2012 to 2022) may be used with Promodag Reports Enterprise edition; however, database size is limited to 10 GB.

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).

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 can only cover a maximal period of **15 consecutive days**.

You can indeed only import up to 15 consecutive days of Office 365 message tracking 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 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.

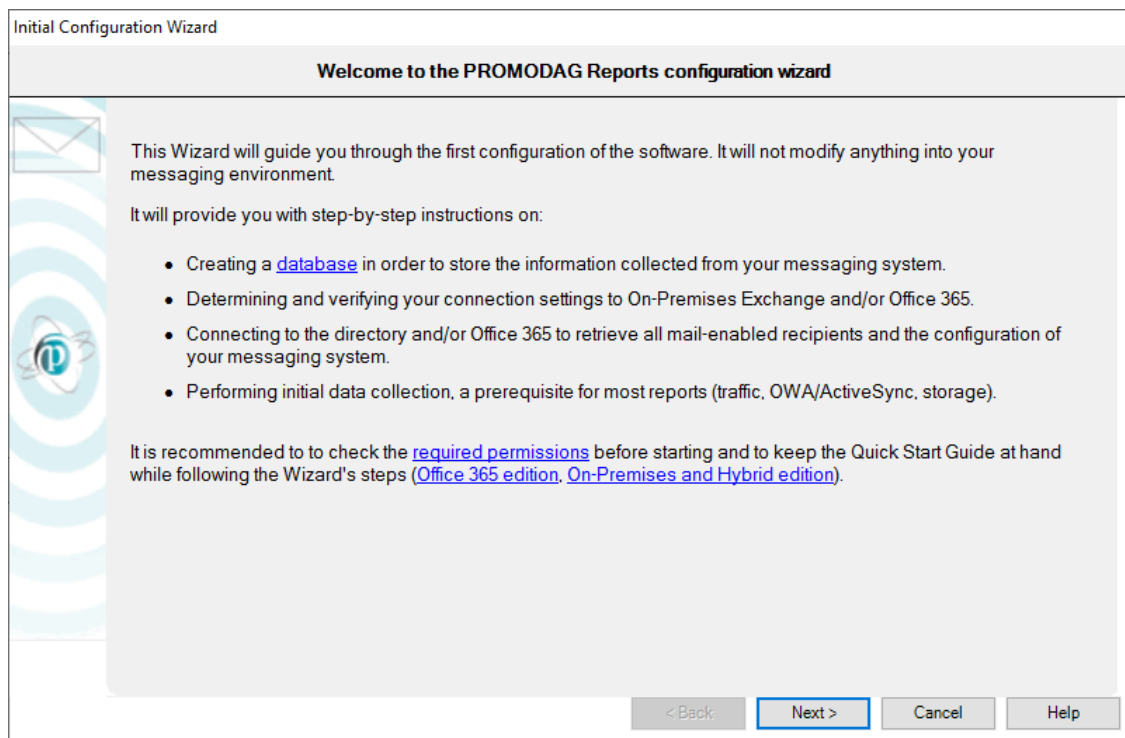
C - Initial setup

Starting the application

From the Start Menu, select Programs > Promodag > Promodag Reports 14 to start Promodag Reports.

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.

Getting started with Promodag Reports

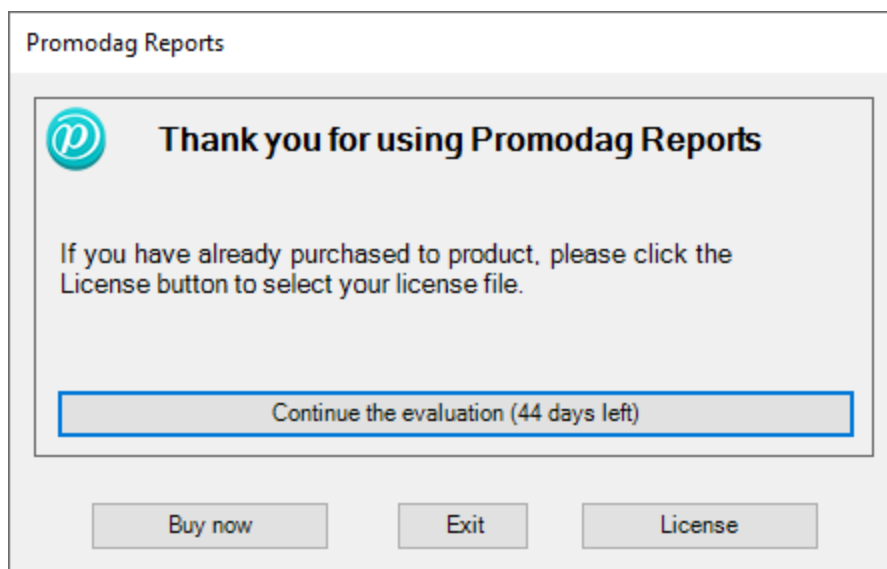


It provides you with instructions on:

1. Evaluating or licensing the product,
2. Creating a new Promodag Reports database,
3. Configuring a connection to your Office 365 tenant,
4. Selecting data sources for traffic and storage size reports,
5. 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

- 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.
- Hybrid deployment: Hybrid deployment 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.
- On-Premises: Administrators run the messaging system on their own servers, in their own company.

Select Office 365.

Database type

SQL Server Express LocalDB

- Best suited for small Exchange organization.
- Usable with all editions of Promodag Reports.
- The physical size limit set by Microsoft to LocalDB database files is 10 GB (10,240 MB).
- Microsoft SQL Server LocalDB 2017 is installed with Promodag Reports.
- No multi-user access.
- The database file should be located on the same computer as Promodag Reports.
- Easy upgrade to SQL Server.

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

Getting started with Promodag Reports

Initial Configuration Wizard

Database creation

Promodag Reports requires a database to store the information it collects from your messaging system and generate reports. You may create as many databases as you need.

General | Advanced options

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

- ☐ On-Premises: local installation of your exchange servers.
- ☒ Office 365: Microsoft Cloud-based Exchange Online organization.
- ☐ Hybrid deployment: a mix of both (some of the mailboxes are local, the others are in Office 365).

Database type:

- ☐ Microsoft SQL localdb ([more](#)).
- ☒ Microsoft SQL Server ([more](#)).

Server name:

Database name: [Advanced...](#)

Authentication:

Login:

Password:

Description:

< Back Next > Cancel Help

3. Configuring a connection to your Office 365 tenant

If you have subscribed to an Office 365 GCC High or DoD plan, choose your Office 365 Cloud from the drop-down list.

You can choose between two sets of settings that allow Promodag Reports to access Office 365 resources:

- **Certificate-based authentication (recommended):** Promodag Reports must be published as an application in Microsoft Entra ID. In this context, the permissions are those that have been granted to the application and not to a user. To create this standard Promodag Reports Application and the linked certificate, see "Certificate-based authentication to Office 365", on page 6. To create a custom Azure application manually, see the help file.
 - Pros:
 - No specific user account and mailbox are required, which completely eliminates the problem of password expiration.
 - No Office 365 license is required.
 - Import of Office 365 licenses and Microsoft 365 data.
 - Cons: None.
- **User-based authentication:** The permissions are those granted to the Promodag Office 365 account. For more information about the required permissions, see User-based authentication to Office 365.
 - Pros: Granting permission is straightforward.
 - Cons:
 - An Office 365 license for a user and mailbox are required.
 - If the password regularly expires, it must be updated in Promodag Reports.

Getting started with Promodag Reports

- The ApplicationImpersonation role is about to be deprecated (February, 2025) and it will no longer be possible to run reports on mailbox and public folder content.
- This mode is incompatible with MFA.
- No import of Office 365 licenses and Microsoft 365 data.

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


Initial Configuration Wizard

The Wizard needs to know your parameters to establish a connection to Office 365.

☒ **Certificate-based authentication** ([What is it?](#) and [How to configure it?](#))

Tenant name: Example: company.onmicrosoft.com

Application ID:

Certificate file: 

Certificate password: [Check validity:](#) November 28 2025

Public folder access mailbox: Example: user@domain.com

☐ **User-based authentication** ([What is it?](#) and [How to configure it?](#))

To establish a connection to your Office 365 tenant, please enter the credentials of an Office 365 user with the View-Only Recipients, Mail Recipients and ApplicationImpersonation roles.
Click on this link to see how to create this user.

User name: Example: user@domain.com

Password:

Exchange Online PowerShell Module 3.3.0

[Check Powershell connection \(not tested\)](#)

[Check EWS connection \(not tested\)](#)

Office 365 Cloud:

< Back Next > Cancel Help

4. Selecting data sources for traffic and storage size reports

Data sources for traffic reports

Promodag Reports will create and then import Office 365 message tracking files to generate traffic reports. Message tracking data is only available from Office 365 for the past 10 days.

Data sources for storage size reports

The size of mailboxes is selected by default. If you have public folders in the Cloud, select Public folder size.

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

Getting started with Promodag Reports

Data Source Configuration Wizard

Select the data sources to configure.

Select and configure data sources according to the reports that you want to produce.

☒ Data sources for traffic reports

Message Tracking Files

Import from: Fri 08 Oct 2021 To: Thu 14 Oct 2021

☒ Data sources for storage size reports

☒ Mailbox size

☐ Mailbox folder size

☐ Public folder size

☒ Mailbox count per database

☐ Mobile device statistics

To run this wizard again, use the Tools > Configuration Wizard option.

< Back Next > Cancel Help

5. Starting the import data process

Processing imports

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

Data Source Configuration Wizard

The configuration wizard has now collected sufficient information import data and run reports.

Congratulations! You have now completed the last step of this wizard.

By clicking the Finish button you will save your changes and immediately start importing data from the following data sources:

☒ Import the structure of your Exchange organization

☒ Import data for traffic reports

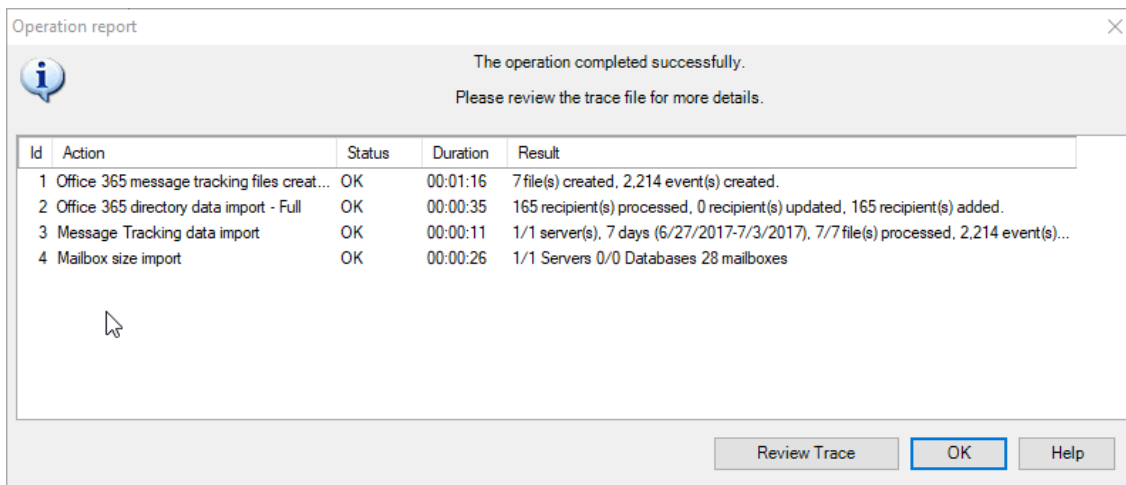
☒ Import data for storage size reports

< Back Finish Cancel Help

Promodag Reports

1. Imports recipients from Office 365,
2. Creates message tracking files,
3. Imports message tracking data,
4. 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.




Chapter 3 - Using reports

A - How to find your way?

Promodag Reports includes about 30 report templates adapted to Office 365 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 open our List of reports templates in the embedded help file.

Templates are grouped in categories, such as **Storage** 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.

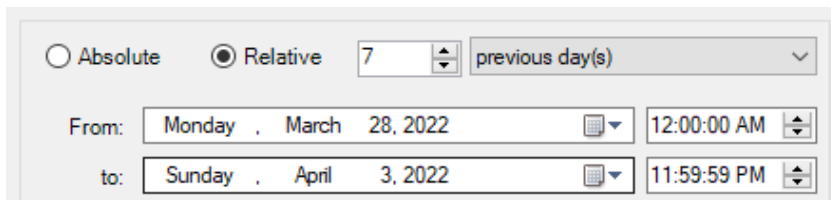
B - Creating new custom reports

1. Selecting a valid reporting period

Period tab and data sources

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

Getting started with Promodag Reports



☐ Absolute ☒ Relative 7 previous day(s) v

From: Monday , March 28, 2022 12:00:00 AM

to: Sunday , April 3, 2022 11:59:59 PM

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.

2. Selecting recipients

Selection tab and recipients

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



A recipient can be a mailbox, a distribution group, a public folder or a mail contact.

Recipients 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 Employee ID.

☐ All organization mailboxes
☒ Mailboxes by: Department

Selection:  

Enter text to search...

... 10 / 10 (0 Selected)

<input type="checkbox"/>	[no value]	
<input type="checkbox"/>	Administration	
<input type="checkbox"/>	Development	
<input type="checkbox"/>	Management	
<input type="checkbox"/>	R & D	
<input type="checkbox"/>	Sales	
<input type="checkbox"/>	Spam	
<input type="checkbox"/>	Support	
<input type="checkbox"/>	Training	

What recipients 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 recipients

Click the ☒ **Exclude >>** button to exclude 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.

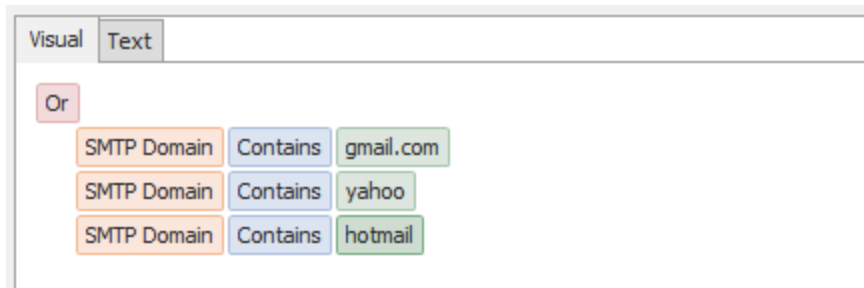
The vast majority of traffic report templates include a **Correspondents** tab. This feature lets you filter the correspondents of the recipients previously selected in the **Selection** tab.

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

- To select all internal correspondents, select: Correspondent type, Is any of, Internal.
- To select all external correspondents, select: Correspondent type, Is any of, External.
- To select all application agents, devices etc. that have an SMTP address but no mailbox, select: Correspondent type, Is any of, Unidentified local recipient.

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.



Visual Text

Or

SMTP Domain Contains gmail.com

SMTP Domain Contains yahoo

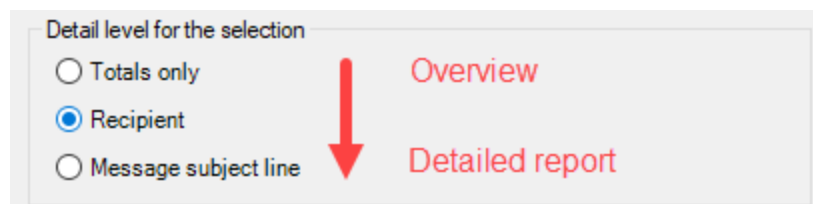
SMTP Domain Contains hotmail

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 recipient traffic such as General Mailbox Traffic includes three detail levels: Totals only, Recipient and Message subject line. If you select Totals only, it will merely display a cumulated total of all messages sent/received by the selected recipients, whereas it would display each single message if you had selected Message subject line.



Detail level for the selection

☐ Totals only

☒ Recipient

☐ Message subject line

Overview

Detailed report

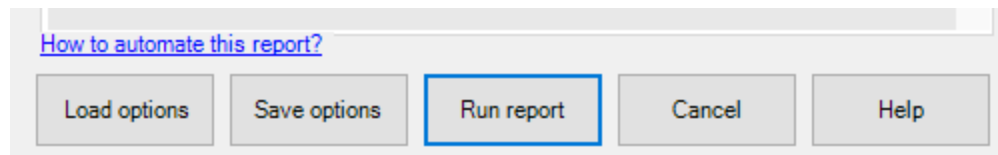
The same principle applies to all other templates that have a *Detail level* option: the more you go down the list, the more detailed the report will be.

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

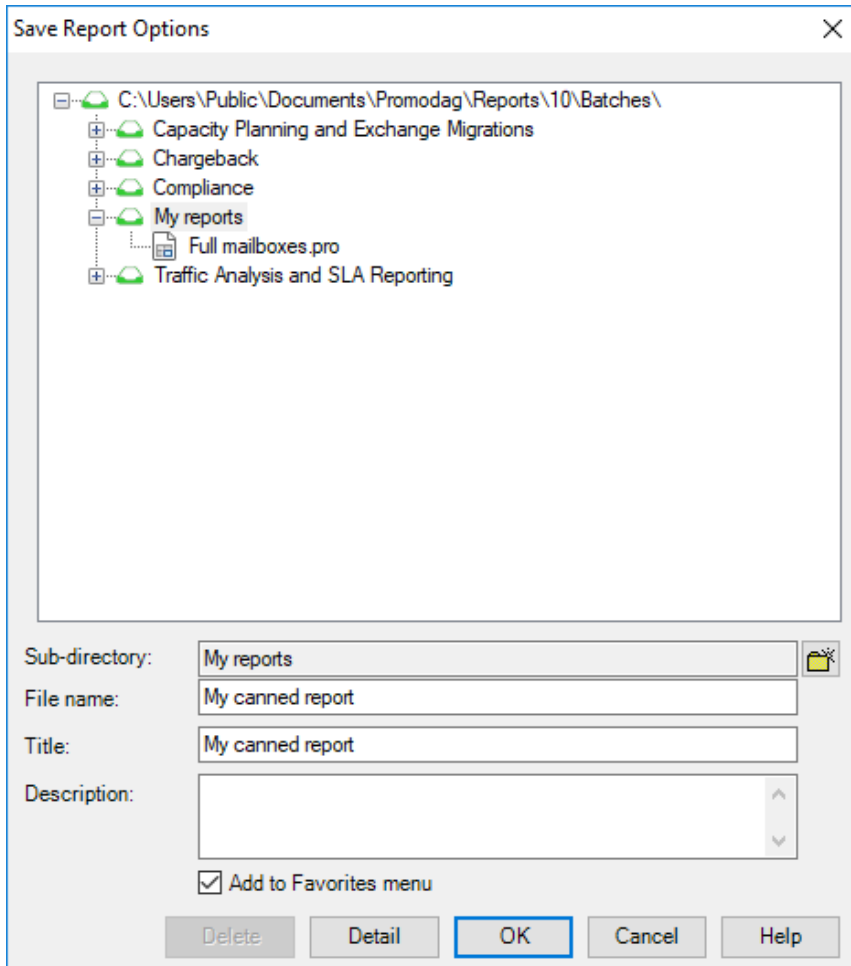


[How to automate this report?](#)

Load options Save options Run report Cancel Help

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.

Getting started with Promodag Reports

- To SharePoint: Select the SharePoint output option. The default server and document library can be selected in the Export tab of Tools > Options.
- To a SQL database table: Select the Database table output option. The default SQL server and database 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 Individual reports tab allows you to email reports to all mailboxes selected in the report.

Support

This page provides an overview of Promodag 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 or use Help > Technical Support Request from the product's menu system.
- Or by phone: +33 1 45 73 49 96 or Toll Free (from USA only): (844) 311-5003.

We normally respond within 2 hours, but please allow 24 hours for us to respond to account for differences in international time zones. Our office hours are 10 AM to 7 PM UTC+1 (Paris), Monday to Friday.

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