



PROMODAG REPORTS 14

Getting started

Office 365

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TABLE OF CONTENTS

Introducing PROMODAG Reports	4
How does it work?	5
Chapter 1 - Prerequisites	6
A - Computer requirements	6
B - Access Office 365 using an app registered in Azure AD (Certificate-based authentication)	6
C - Access Office 365 with an account (User-based authentication)	7
D - SQL Server requirements for Promodag Reports Enterprise edition	7
Chapter 2 - Getting started	9
A - Evaluating the product	9
B - Installing the application	9
C - Initial setup	9
Chapter 3 - Using reports	16
A - How to find your way?	16
B - Creating new custom reports	16
C - Saving custom reports	19
D - Previewing, exporting, publishing and e-mailing reports	20
Support	21
Index	22

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.

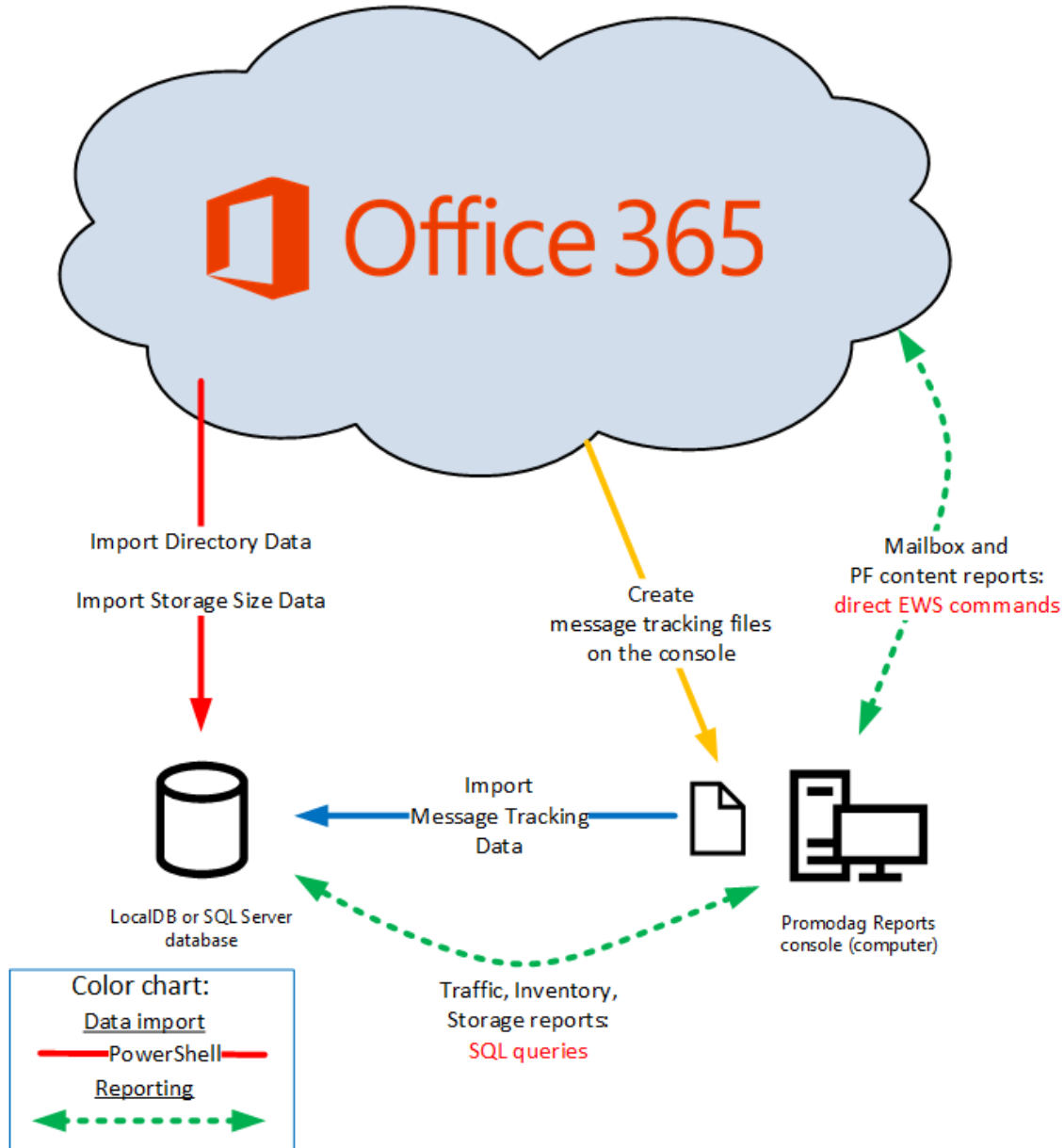
With its powerful and easy-to-understand features, Promodag Reports produces comprehensive reports that you can rely on to ensure better security, business continuity, and to get a better understanding on the email activity within your organization.

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?

Promodag Reports collects the information it needs from your Office 365 tenant and stores it into a database.

Office 365 environments: schematic system layout



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 8.1/Windows Server 2012 R2 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 - Access Office 365 using an app registered in Azure AD (Certificate-based authentication)

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. Register Promodag Reports

Please follow these steps to register Promodag Reports as an application in Azure AD:

1. Go to **Tools > Options** and open the *Office 365 Connection* tab.
2. Select **Certificate-based authentication**.
3. Click the [Check connection...](#) blue link at the bottom.
4. An "Admin consent required" dialog box appears. Click Copy consent link to clipboard.
5. Open a browser and paste the link.
6. Login to Office 365 as a Global Administrator.
7. A "Permissions requested" message appears. Click **Accept**.

2. Assign the required role to Promodag Reports

Please follow these steps to assign the Global Reader role to the Promodag Reports app in Azure AD:

1. On the Azure AD portal at <https://portal.azure.com/>, under Manage Azure Active Directory, click **View**.
2. On the Overview page that opens, under Manage, select Roles and administrators.

Getting started with Promodag Reports

3. On the Roles and administrators page that opens, find and select the Global Reader role by clicking on the name of the role (not the check box) in the results.
4. On the Assignments page that opens, click **Add assignments**.
5. In the Add assignments flyout that opens, find and select the Promodag Reports application.
6. When you're finished, click **Assign**.
7. Back on the Assignments page, verify that the Promodag Reports app has been assigned to the Global Reader role.

C - Access Office 365 with an account (User-based authentication)

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 Office 365 Admin Center as an administrator.
- On the Home page, choose 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 Office 365 Admin Center as an administrator.
- Click Admin > Exchange to open the Exchange Admin Center.
- Select Classic Exchange admin center.
- Click Permissions and open the Admin role tab and then click **Add +**.
- In the New role group window that appears, enter a name and a description pour this new group, for example 'Promodag Reports Role Group'.
- In Roles, click **Add +** and select the Mail Recipients and View-Only Recipients roles.
- Click **+** to add the Promodag user.
- Click **Save**.

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 follow the steps described in the previous section.
- If you use Modern Authentication with Office 365, authorize Promodag Reports in Azure AD. To perform this task, open the application, go to Tools > Options, select the *Use Modern Authentication with EWS* check box, test your connection in Office 365 configuration and follow the instructions provided .

D - SQL Server requirements for Promodag Reports Enterprise edition

1. Supported versions

Promodag Reports supports all editions of Microsoft SQL Server from SQL Server 2008 to SQL Server 2022.

SQL Server Express (2008 to 2022) may be used with Promodag Reports Enterprise edition; however, database size is limited depending on the version (10 GB for SQL Server 2008 R2/2022 Express and 4 GB for SQL Server 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).

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.

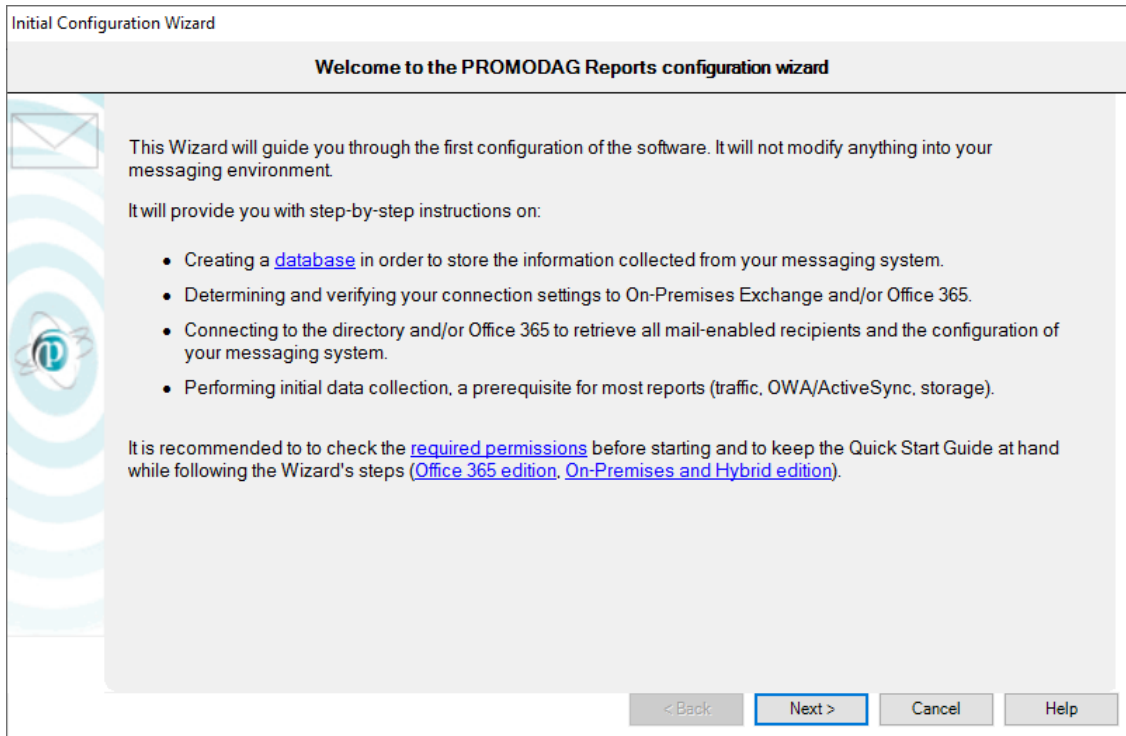
C - Initial setup

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

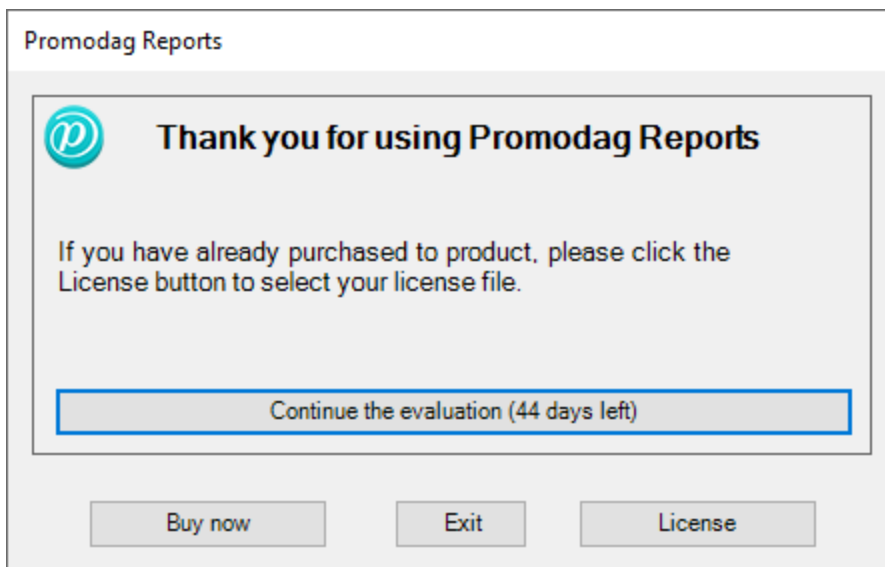


It provides you with instructions on :

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).
- 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 Enterprise application in Azure. In this context, the permissions are those that have been granted to the application and not to a user. To initiate this publication process, click the [Check connection...](#) link and follow the instructions provided. You can also create a custom Azure application.
 - Pros:
 - No specific user account and mailbox are required, which completely eliminates the problem of password expiration.
 - No Office 365 license is required.
 - Cons: Permissions are granted through an Azure role.
- **User-based authentication**: The permissions are those granted to the Promodag Office 365 account. For more information about the required permissions, see [Creating a Promodag user for your Office 365 tenant](#).
 - Pros: Permissions can be granted to the account in a more granular way.
 - Cons:
 - An Office 365 license for a user and mailbox are required.
 - If the password regularly expires, it must be updated in Promodag Reports.
 - This mode is incompatible with MFA.

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

The screenshot shows the 'Initial Configuration Wizard' window. At the top, a message states: 'The Wizard needs to know your parameters to establish a connection to Office 365.' Below this, there are two main authentication options:

- Certificate-based authentication** (selected): Includes fields for 'Tenant name' (filled with 'company.onmicrosoft.com') and 'Impersonated user name' (filled with 'promodaguser@company.com'). A 'Configure' button is visible next to the 'Promodag Azure Application' option.
- User-based authentication** (unselected): Includes fields for 'User name' and 'Password'.

At the bottom of the wizard, there is a dropdown menu for 'Office 365 Cloud' set to 'Worldwide', and four navigation buttons: '< Back', 'Next >', 'Cancel', and '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: To:

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

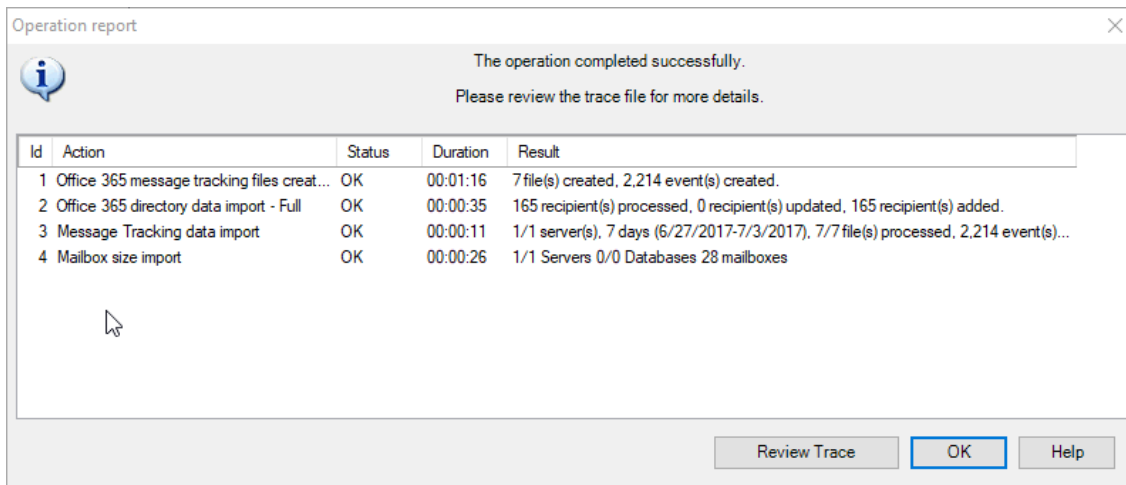
< Back Finish **Cancel** Help

Promodag Reports

Getting started with 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.

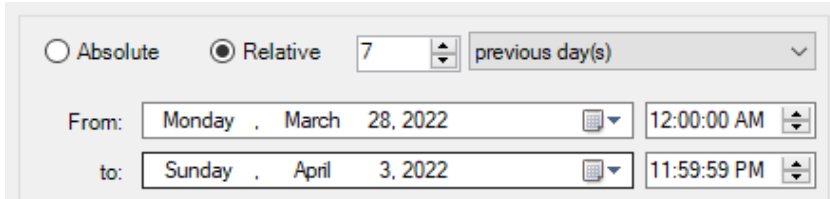
B - Creating new custom reports

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.

The screenshot shows a web interface for selecting mailboxes. At the top, there are two radio buttons: "All organization mailboxes" (unselected) and "Mailboxes by:" (selected). Below "Mailboxes by:" is a dropdown menu currently set to "Department". Underneath is a "Selection:" section with a search bar containing "Enter text to search..." and a magnifying glass icon. Below the search bar is a table with 10 rows, each with a checkbox and a label. The first row is "[no value]" and is highlighted. The other rows are "Administration", "Development", "Management", "R & D", "Sales", "Spam", "Support", and "Training". To the right of the table are three sets of four small blue square icons, likely for grid or list view toggles.

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.

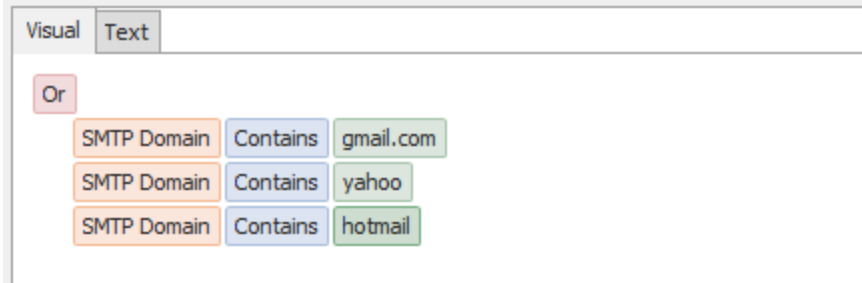
The most usually available option allows you to select correspondents by address type.

- 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.

Getting started with Promodag Reports

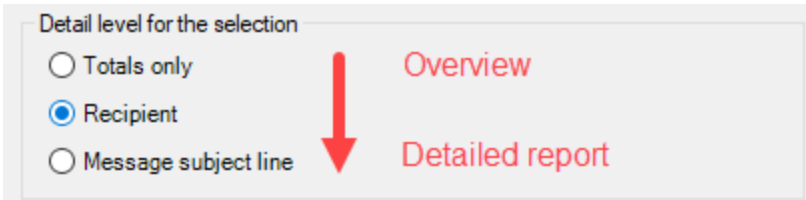


4. Selecting the right detail level

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.



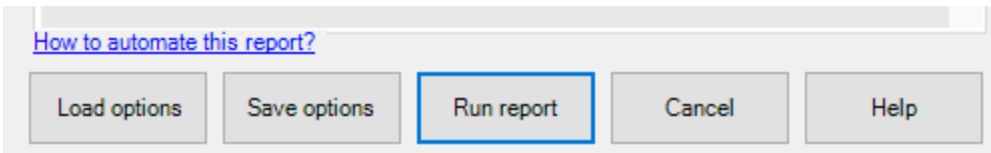
The same principle applies to all other templates that have a *Detail level* option: the more you go down the list, the more detailed the report will be.

C - Saving custom reports

1. Saving and reloading a report with its options

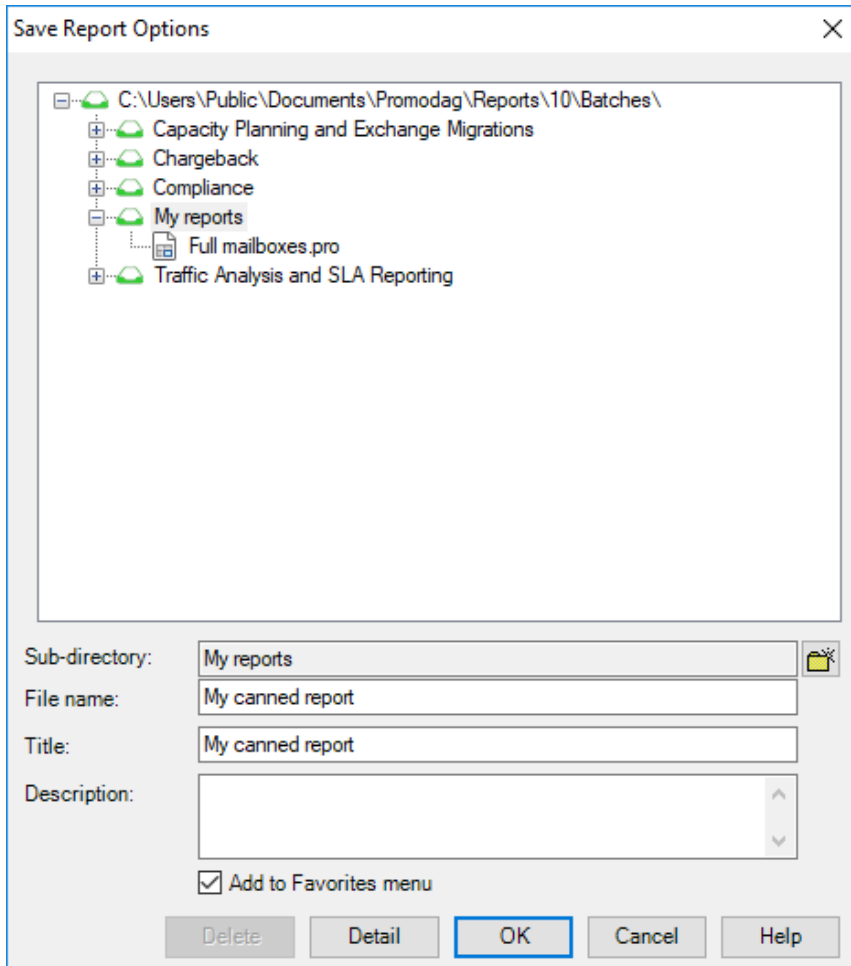
To create and save a new custom report, select a report template from the Templates menu, and select the options of your choice. You may also record specific selection settings separately if you plan to reuse them in other reports.

- 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.



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.

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.

Index

Certificate-based authentication		Workstation	6
Office 365	6	SQL Server	
Configuration		Requirements	7
Connection to the Office 365 tenant	12	SQL Server database	11
Data source		Support	
Traffic and storage size reports ...	13	Self-help resources	21
Database		Submit a request	21
LocalDB	11	User-based authentication	
SQL format	11	Office 365	7
Evaluation mode	9	Wizard	
Installation	9	Configuration	9,12-13
LocalDB database	11		
Office 365			
ApplicationImpersonation role	7		
Certificate-based authentication ...	6		
Roles	7		
System layout	5		
User-based authentication	7		
Report options file	19		
Reports			
Detail level	19		
Export	20		
Period	16		
Preview	20		
Publish	20		
Selecting correspondents	18		
Selecting Exchange recipients	17		
Requirements			
Hardware	6		
Operating system	6		
SQL Server	7		