



**P R O M O D A G**

PROMODAG REPORTS 7.5

FOR MICROSOFT EXCHANGE SERVER

Reporting on Exchange made simple!

Getting started

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## About this guide

This guide is designed to provide a quick introduction to PROMODAG Reports for Microsoft Exchange Server, from getting started to producing the first report.

For more details about specific features in PROMODAG Reports, refer to the online Help system.

## Configuring your Exchange server

### Microsoft Exchange Server requirements

PROMODAG Reports supports all versions of Microsoft Exchange Server (4.0, 5.0, 5.5, 2000, 2003). It is possible to use the product with a mix of different Exchange Server versions.

**NOTE: Nothing must be installed on the Exchange Server or changed in the Exchange organization.**

### Reports data sources

PROMODAG Reports requires different data sources to produce its various reports. There are four types of data sources that must be configured on the Exchange server(s) to get reports.

#### Exchange Directory

The Exchange Directory data source is used to produce the various reports on the Exchange directory. PROMODAG Reports needs to import the entire Global Address List (GAL) of the Exchange organization, thus enabling identification of:

- servers and sites
- users and mailboxes
- distribution lists and their members
- custom recipients or contacts (e.g., users outside the Microsoft Exchange organization)

Importing the GAL can be done using an LDAP or a MAPI connection.

**NOTE: Importing the Global Address List must be done the first time and, subsequently, every time the list is updated.**

Global Address List size should not be a problem for most organizations. Some PROMODAG customers have a Microsoft Exchange organization with a Global Address List of more than 300,000 entries.

#### Messages Tracking Files

The Message Tracking Files data source is used to produce the various reports on the Exchange traffic. Microsoft Exchange Server uses the message tracking files to record all mail activity. Each message received from or sent to the server writes an event in the daily message tracking file. PROMODAG Reports reads these files, analyzes their content and stores the result in a Microsoft Access or SQL Server database.

#### Exchange Server Information Store

The Exchange Server Information Store data source produces reports that list mailboxes or public folders size. It requires direct access to the Exchange server information store.

#### Mailbox and Public Folders Size

The mailbox and public folders size information is dynamically collected from the information store of the Exchange server using MAPI. When importing mailbox size, the report is a snapshot of the mailbox size at the time of the import or the report. When used through a report, the information is not stored in the database.

**NOTE: The Exchange server does not keep a history of the mailbox or public directory information, so there is no way to re-import old dates.**

## Mailbox and Public Folder Content

The mailbox and public folders content information is collected by connecting to the Exchange server using MAPI. Data is not stored in the database.

## Information Store Size

The information store size is collected by reading the file size of Exchange server database files. Those files are accessed through an UNC path. Data is stored in the database.

## Outlook Web Access

Outlook web access is only supported on Exchange 200x. Promodag reads the log files of the Internet Information Server then store the information in its database. The IIS log files are read through an UNC path. Data is stored in the database.

## Internet Mail Connector Archives

The Internet Mail Connector Archives data source contains all messages that have gone through the Internet Mail Connector. The archives are used to get the subject of the messages received from or sent to the Internet. This feature does a full copy of the messages, thus requiring a large disk space.

**NOTES: It is only available with Microsoft Exchange version 4 or 5.x .**

**With Microsoft Exchange 200x, subjects of messages are directly available in the messages tracking files both for Internet and internal messages.**

## Configuring Microsoft Exchange Server version 4.0, 5.x

### Exchange directory

#### **Connecting via MAPI**

There are no specific requirements regarding administrative rights to import the directory via a MAPI connection. Importing the directory requires an NT account with access to a mailbox in an Exchange server.

#### **Connecting via LDAP**

To import the directory via an LDAP connection, the LDAP protocol must be enabled on the Exchange server.

### Message tracking files

For PROMODAG Reports to work, message tracking files generation must be enabled at the information store level and at the MTA level. Each option must be activated for all servers within a site. It should be decided how long these files should be kept on the server.

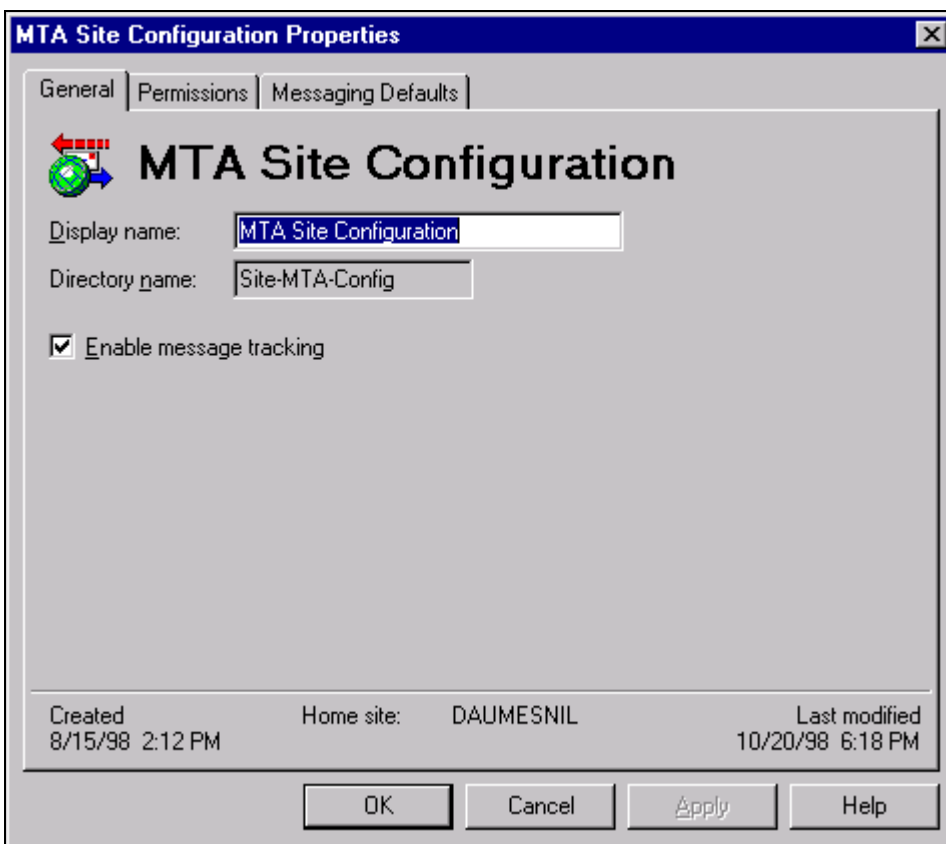
**NOTE: Enabling message tracking in the Microsoft Exchange Server requires a Microsoft Exchange Server administrator, and is done by using the Exchange Server administrator program.**

### Enabling message tracking at the MTA level

Click on the *Configuration* folder under the site.

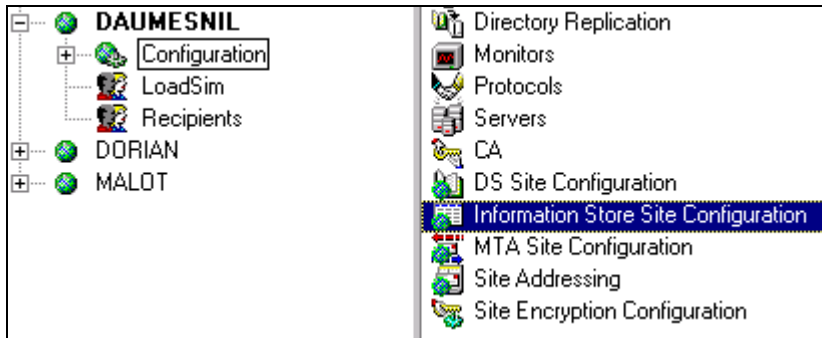


Double click on *MTA Site Configuration* in the right panel to open the MTA Site Configuration Properties, and check the *Enable message tracking* checkbox.

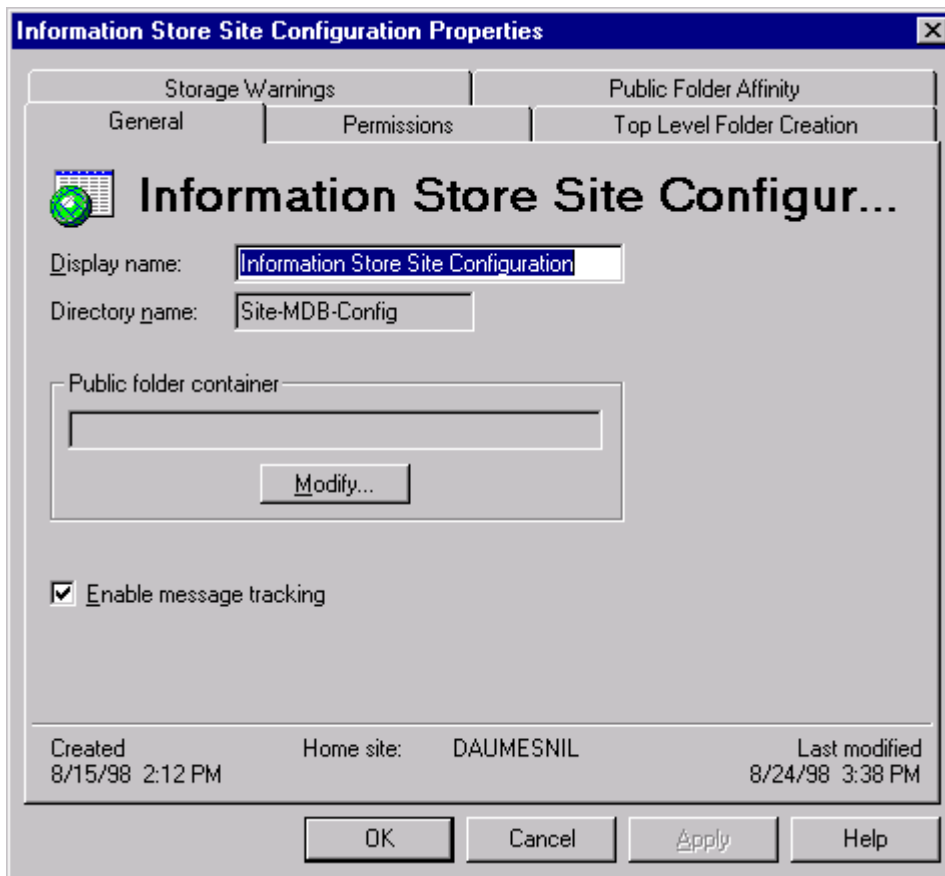


### Enabling message tracking at the Information Store level

Click on the *Configuration* folder under the site.



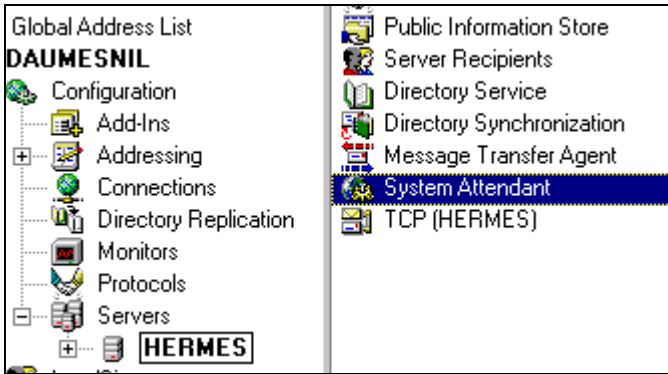
Double click on *Information Store Site Configuration* in the right panel to access the Information Store Site Configuration Properties. Check the *Enable message tracking* checkbox.



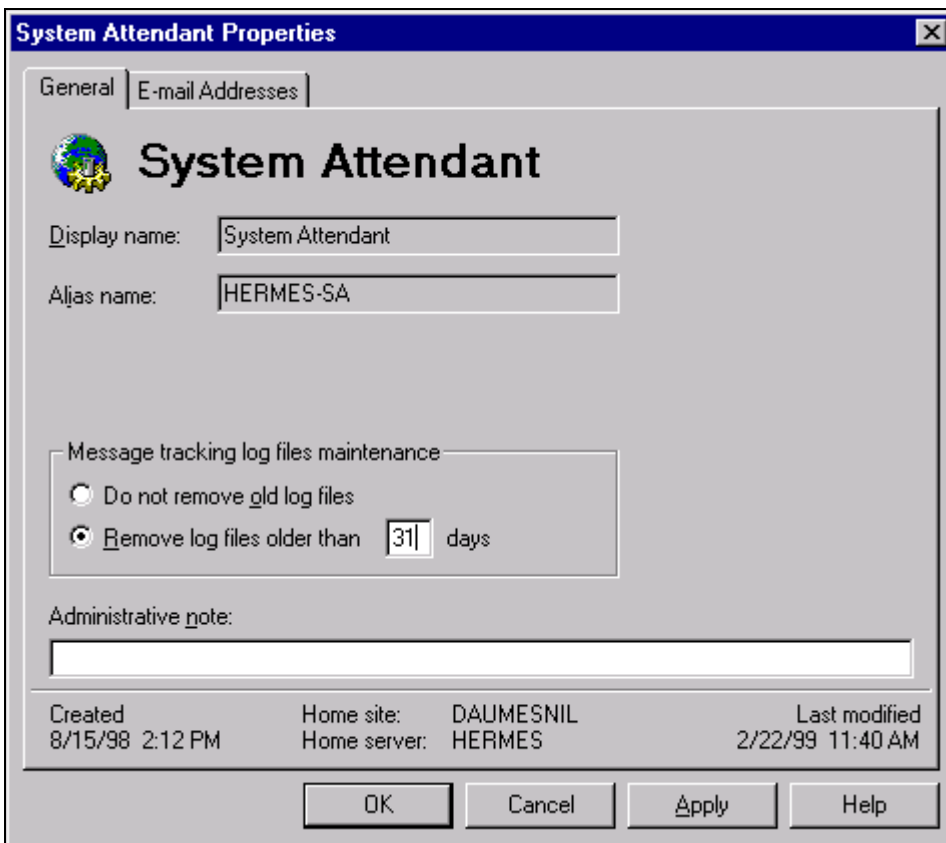
### How long should message tracking files be kept

Microsoft Exchange Server keeps message tracking files for 7 days by default. This can be changed on a per server basis to accommodate different needs. For example, to import message tracking files in PROMODAG Reports only once a month, they must be kept for 31 days.

In Exchange Administrator, select the server to modify.



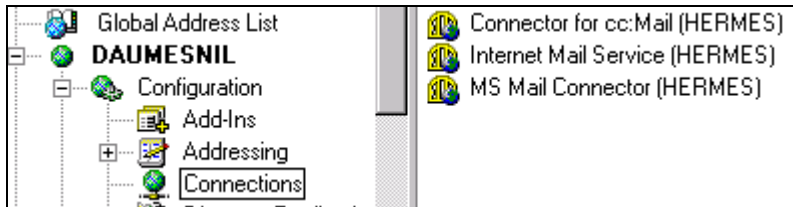
Double click on *System Attendant* to access the System Attendant Properties, and enter the number of days message tracking files should be kept.



Enable message archival on the Internet Mail Connector

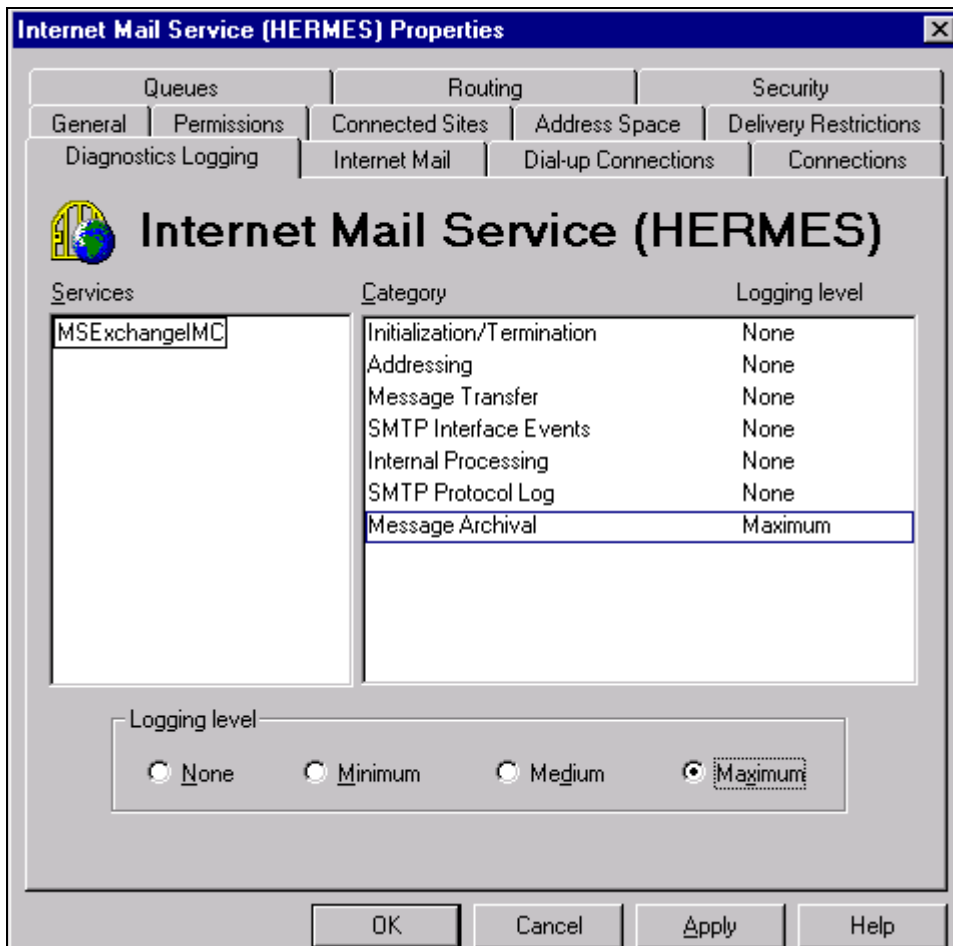
**NOTE: Enabling message archival on the Internet Mail Connector requires a Microsoft Exchange Server administrator, and is done by using the Exchange Server administrator program.**

To enable message archival on the Internet Mail Connector, click on *Connections* in the Configuration directory.



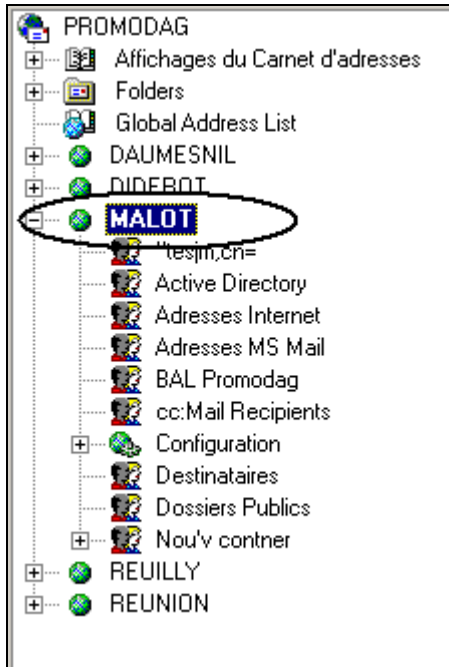
Double click on *Internet Mail Connector* in the right panel to access Internet Mail Service Properties. Activate the *Diagnostics Logging* tab and set the Message Archival logging level to Maximum.

**NOTE: The service must be restarted using the control panel for the changes to take effect.**

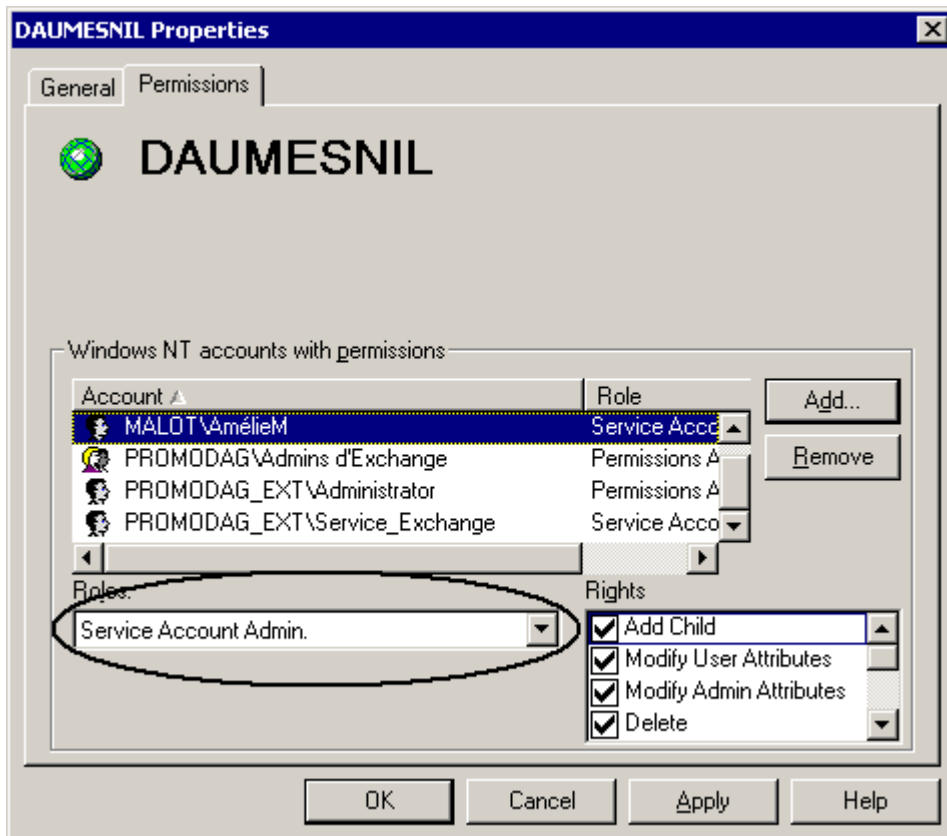


### Configuring permissions for Exchange Server Information Store

Configuring permissions for the Exchange Server Information Store requires a connection with an NT account that has administrative rights to the Exchange organization for all the sites with servers to be reported on. This configuration should be done using the Exchange administrative tool at the Site level.



Right click the server to access the server Properties. Access the *Permissions* tab and enter *Service Account Admin* as the NT account role.



## Configuring Microsoft Exchange Server 200x

Exchange directory

### Connecting via MAPI

There are no specific requirements regarding administrative rights to import the directory via a MAPI connection. Connecting via MAPI requires an NT account that has access to a mailbox on an Exchange server.

### Connecting via LDAP

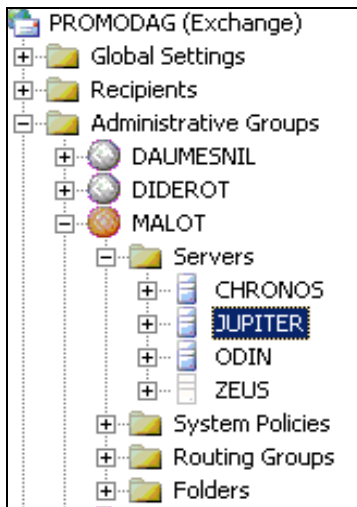
To import the directory via a LDAP connection, you must be logged in with an NT account that has at least the *Exchange View Only Administrator* role on the Exchange organization.

Message tracking files

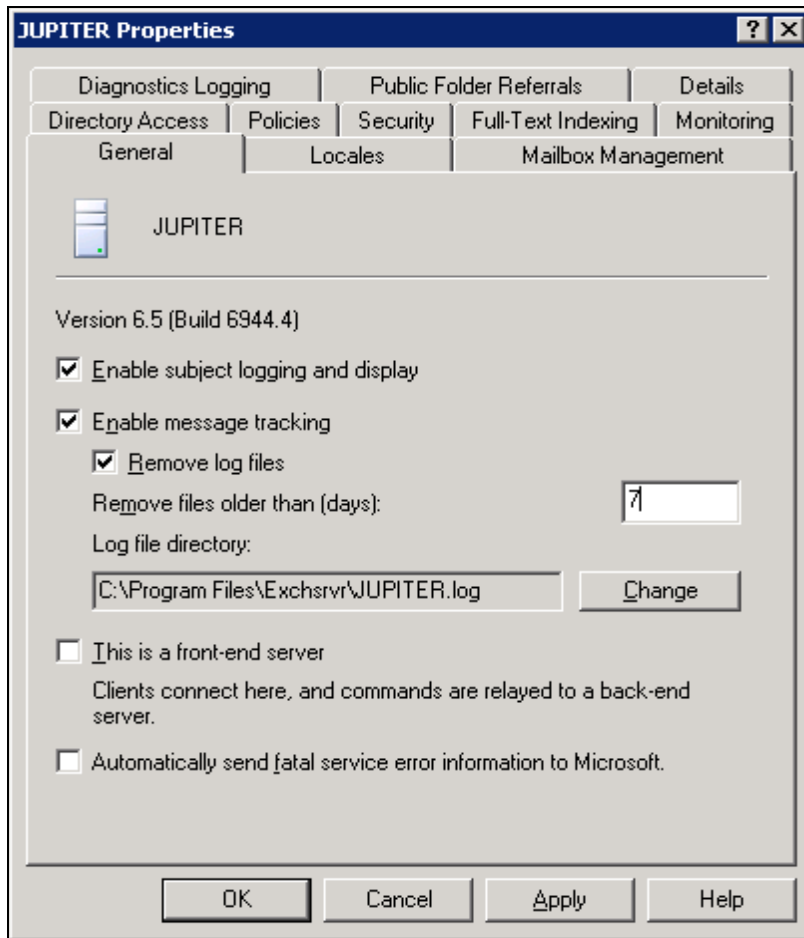
For PROMODAG Reports to work, message tracking file generation must be enabled at the server level. Furthermore, it should be decided how long these files should be kept on the server.

**NOTE: Enabling message tracking in the Microsoft Exchange Server requires a Microsoft Exchange Server administrator, and is done by using System manager program.**

To enable message tracking, select the Exchange 200x server and then click on the *Properties* button.



Access the *General* tab, and click the *Enable subject logging and display* and *Enable message tracking* check boxes.

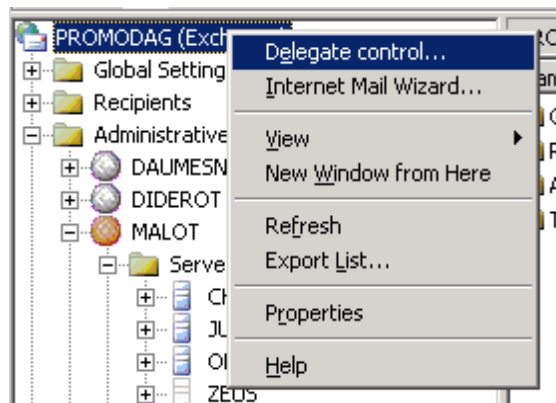


The default duration that message tracking files are kept is 7 days. This parameter can be modified according to different needs using the *Log file maintenance* parameters.

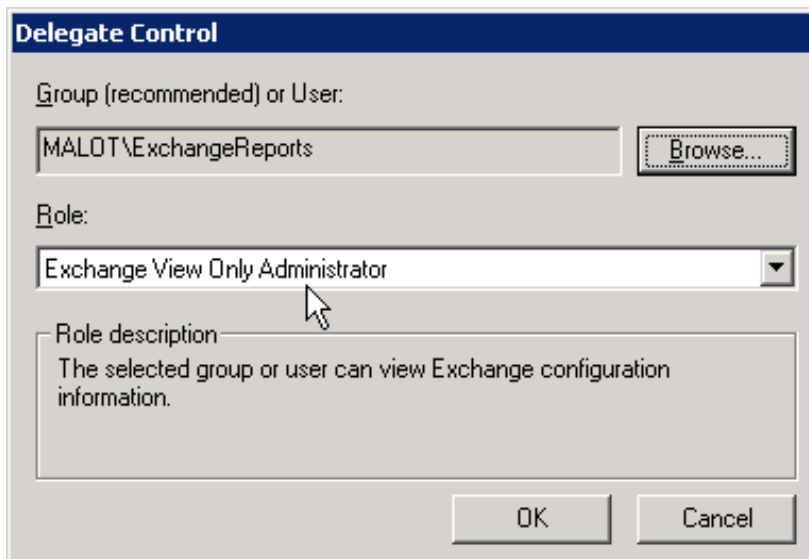
### Configuring permissions for Exchange Server Information Store

It is necessary for the role for the NT account in use to be set at least as *Exchange View Only Administrator*. Using the Exchange System Manager, follow the steps below to set the role.

1. Launch Exchange System Manager.
2. Right click on the Exchange organization name.
3. Choose *Delegate control* to open the Exchange Administration Delegation Wizard.



- Select the NT account and set its role to *Exchange View Only Administrator*.



Permissions for the Mailboxes Content group of reports

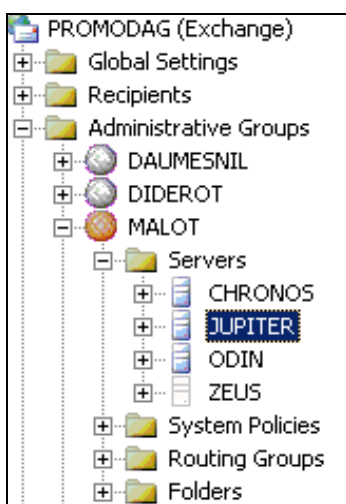
The Mailboxes Content reports need to access all mailboxes to be included in the report. This access should function as if you are the owner of the mailbox.

#### For individual mailboxes

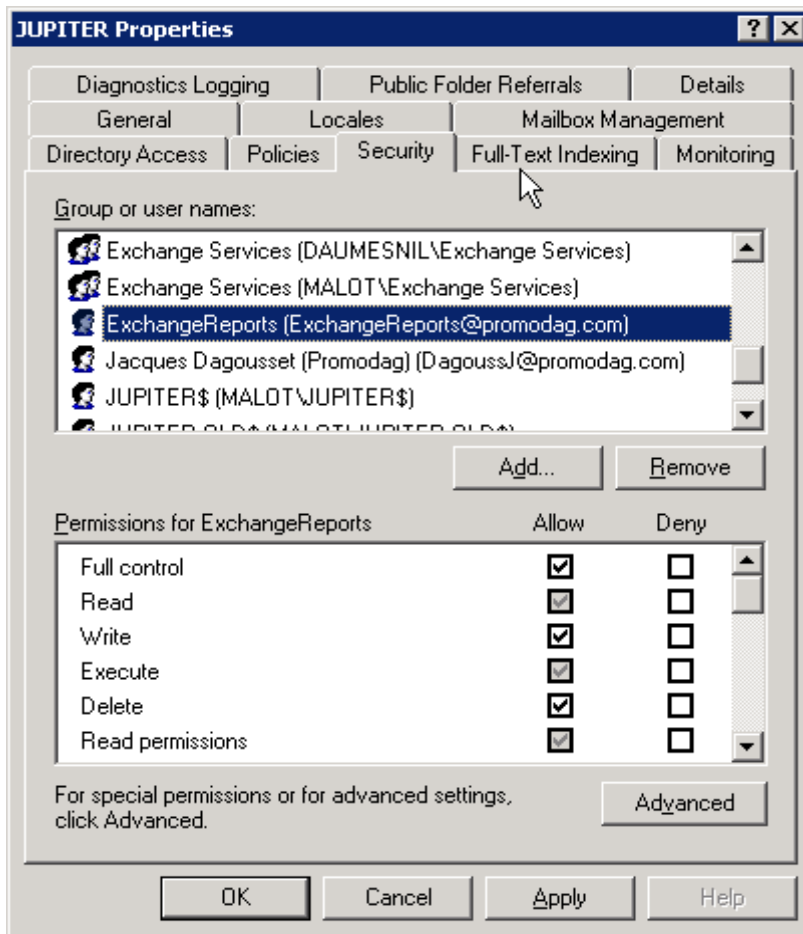
Set permissions for each mailbox individually using the *Mailbox Rights* button in the *Active Directory Users and Computers* program. Permissions can be specified for each user.

#### For all mailboxes on a particular server

Set permissions for mailboxes on a particular server by using Exchange System Manager. Right click on the desired Exchange Server and select *Properties*.



Activate the *Security* tab. Select the desired user account and check the appropriate boxes under the *Allow* column to allow all permissions.



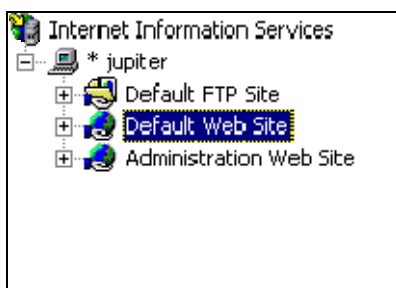
**For mailboxes at other levels of the organization**

For a detailed description on how to correctly specify mailboxes at other levels of the organization, refer to:

<http://support.microsoft.com/kb/262054/EN-US/>

**Configuring the IIS Server for OWA Reports**

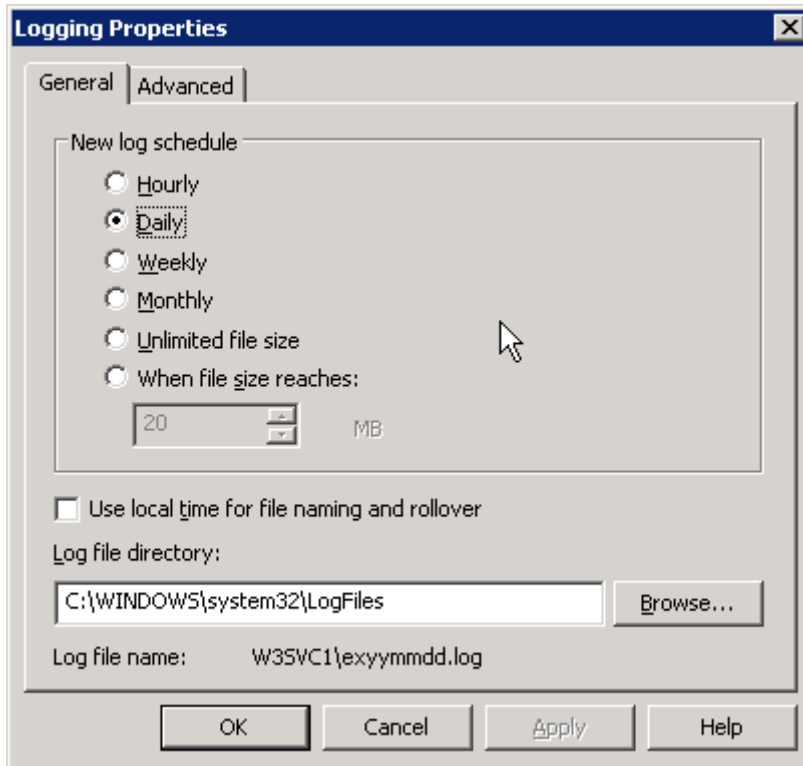
To configure the IIS server for OWA reports, right click on the Internet Information Server.



First verify that that the *Enable Logging* checkbox is checked, then click on the *Properties* button to access the *Extended Logging Properties*.

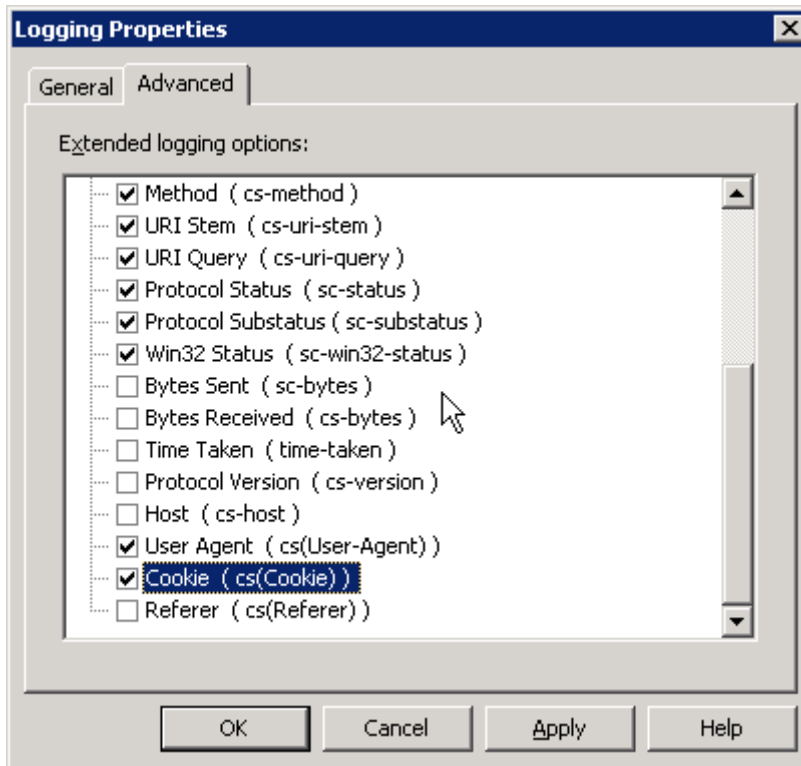
The screenshot shows the 'Default Web Site Properties' dialog box. It has a title bar with a question mark and a close button. The dialog is divided into several tabs: Documents, Directory Security, HTTP Headers, Custom Errors, Web Site, Performance, ISAPI Filters, and Home Directory. The 'Web Site' tab is selected. The 'Web site identification' section contains a 'Description' field with 'Default Web Site', an 'IP address' dropdown menu set to '(All Unassigned)', and 'Advanced...' button. Below these are 'TCP port' (80) and 'SSL port' (empty) fields. The 'Connections' section has a 'Connection timeout' field set to '120 seconds' and a checked 'Enable HTTP Keep-Alives' checkbox. The 'Enable logging' section has a checked checkbox and an 'Active log format' dropdown menu set to 'W3C Extended Log File Format', with a 'Properties...' button next to it. At the bottom are 'OK', 'Cancel', 'Apply', and 'Help' buttons.

Next, verify that the *New Log Time Period* is set to Daily and activate the *Extended Properties* tab.



Confirm that the following *Extended Properties* checkboxes are selected:

- Method (cs-method)
- URI Stem (cs-uri-stem)
- URI Query (cs-uri-query)
- Cookie (cs(Cookie))
- Time
- Date
- c-ip
- cs-username



## Installation

### Hardware and software requirements

It is recommended that PROMODAG Reports be installed on a workstation rather than on the Microsoft Exchange Server.

#### Workstation

- Windows 2000, XP 2003
- 600 Mhz Intel Pentium Processor
- 128 Mb of memory
- Enough disk space to store the database
- Microsoft Outlook 2000, XP sp1, 2003 with Collaboration Data Object installed
- A valid MAPI profile to connect to the Microsoft Exchange Server

#### Microsoft .NET Framework 1.1 Redistributable

Available through Microsoft Windows Update (<http://windowsupdate.microsoft.com/>).

#### Microsoft Data Access Components (MDAC) 2.6

To communicate with its database, PROMODAG Reports uses Microsoft Data Access Components (MDAC). It can be downloaded using the Microsoft web site at <http://www.microsoft.com/data>.

#### Collaboration Data Objects (CDO)

To communicate with the Microsoft Exchange Server, PROMODAG Reports uses Collaboration Data Objects.

This Application Programming Interface (API) is composed of some DLL's, which are delivered with:

- Outlook 2000
- Outlook XP SP1
- Outlook 2003

**NOTES: Make sure to choose a custom Outlook installation in order to install Collaboration Data Objects option during Outlook installation.**

**Outlook XP SP1 is required due to a bug in the initial release that prevented some reports from working.**

#### Microsoft SQL Server

The Enterprise edition requires Microsoft SQL Server 2000 (SP3 or SP4) 2005.

### Upgrade from a previous version

If a previous version already exists, install Version 7 in a different directory. Both versions will be accessible using different databases.

## Upgrading the database

To work with version 7, the existing database needs to be converted. Version 7 database will not work with previous versions of PROMODAG Reports. The process to convert the database is included in version 7 and should be done automatically. It can be time consuming.

**NOTE: Please make sure to backup your database before upgrading.**

## Upgrading batches files

If reports definitions (favorites) or batch files were created in the previous version, they will still be usable. Access them by copying files from the batches directory of the old version to the batches directory of the new version.

**NOTE: It is necessary to reload then save those files in order to convert them in version 7 format.**

As some options might have changed, confirm that the expected report is generated from the converted files.

## Install PROMODAG Reports

### Installing from a CD

1. Click on the CD drive.
2. Open the Promodag directory
3. Go to the US (English) or Fr (French) directory.
4. Click on the prpx6e.exe (English) or prpx6f.exe (French) icon.
5. Follow the instructions.

### Installing from a downloaded file

1. Go to [www.promodag.com](http://www.promodag.com) to download PROMODAG Reports.
2. Choose a temporary directory to store the installation package.
3. In the temporary directory, click on the program you downloaded to launch the installation.
4. Follow the instructions.

## Uninstalling PROMODAG Reports

Use the control panel of Windows to uninstall PROMODAG Reports.

## Quick Tour

### Launch PROMODAG Reports

From the Start Menu of Windows, choose Programs > PROMODAG > PROMODAG Reports. The first time the application is launched, a wizard will provide instructions for:

- Creating a PROMODAG Reports database
- Importing message tracking files

### Creating a PROMODAG Reports database

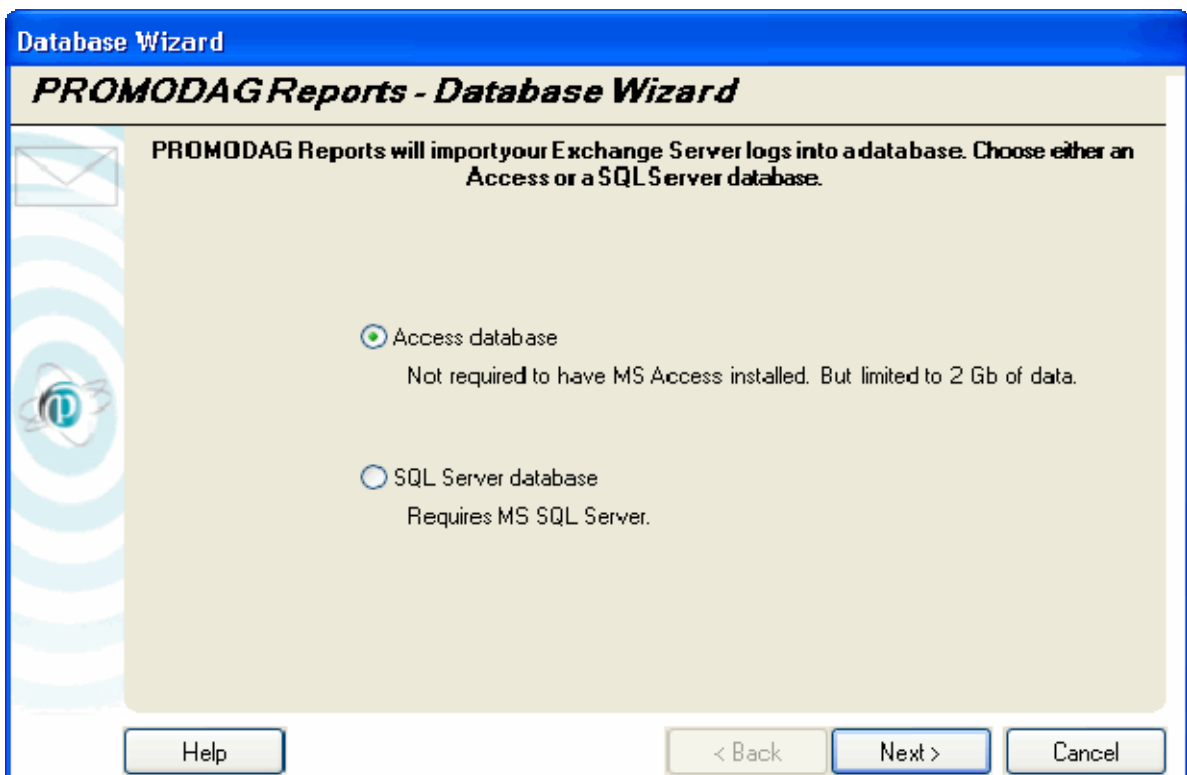
PROMODAG Reports creates a Microsoft Access or SQL Server relational database from Microsoft Exchange Server data source (Exchange directory, message tracking files and Internet mail connector archives. See Reports Data Sources). Once the data is stored in the database, PROMODAG Reports queries it to provide a variety of analytical reports and graphs.

#### Microsoft Access database

The Microsoft Access database format suits small and medium companies that have less than 10 servers. An Access database can store a maximum of 2 GB of data. There is no need to install a database server.

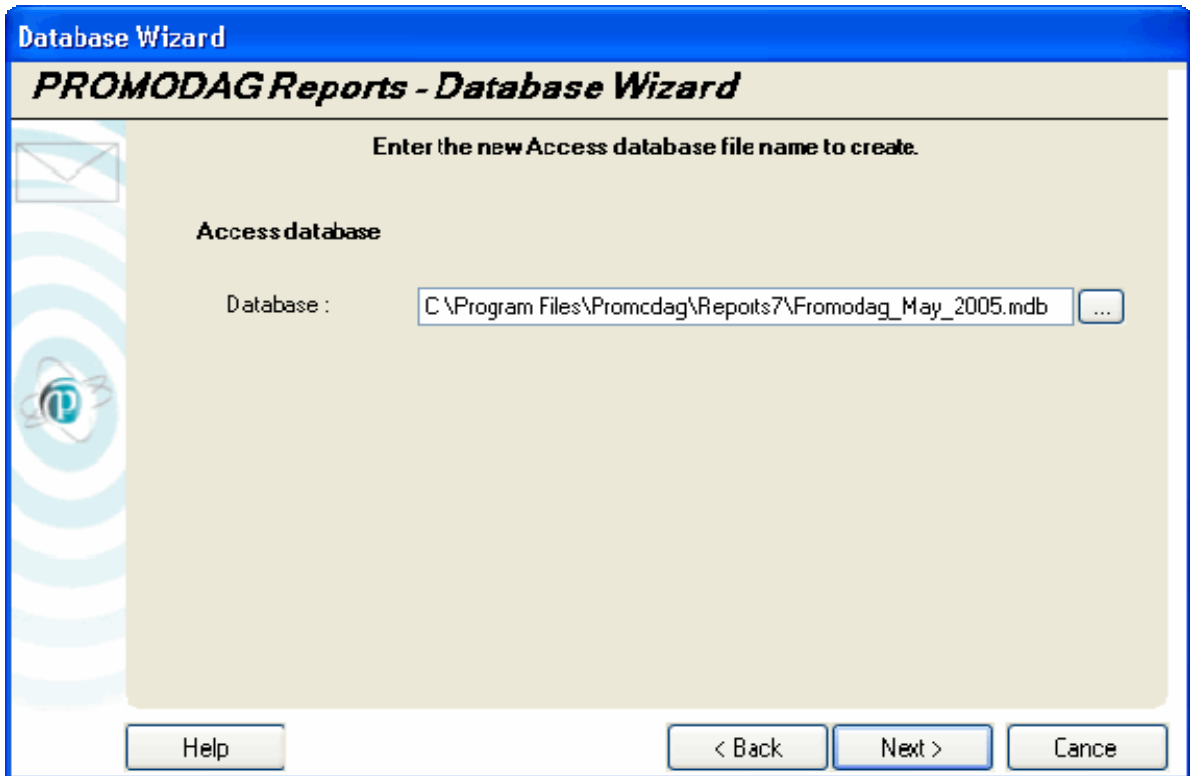
#### Microsoft SQL Server database

The Microsoft SQL Server database format is recommended when it is necessary to store a large number of messages (for larger companies). The size of the database is only limited by the disk space available. It is necessary to have and install a Microsoft SQL Server separately.



Creating an Access database

When creating an Access database, simply specify a name for the file.



### Creating a SQL Server database

When creating a SQL Server database, specify the name of the SQL server and the name of the database. Then, choose the authentication method to connect to the server.

**Database Wizard**  
**PROMODAG Reports - Database Wizard**

Enter the name of the new SQL Server database to create and the authentication mode.

**SQL Server database**

SQL Server:

Database:

**SQL connection information**

Windows NT authentication

SQL Server authentication

Login ID:

Password:

Creating a database based on the current one

When creating a database based on the current one, if a database is already open, the directory and configuration information may be kept the same.



## Quickstart Wizard

The Quickstart Wizard provides a user friendly interface to start with PROMODAG Reports. It will automatically appear when the database is empty. The wizard screens enable the user to perform different operations for configuring the Exchange directory and importing message tracking files.

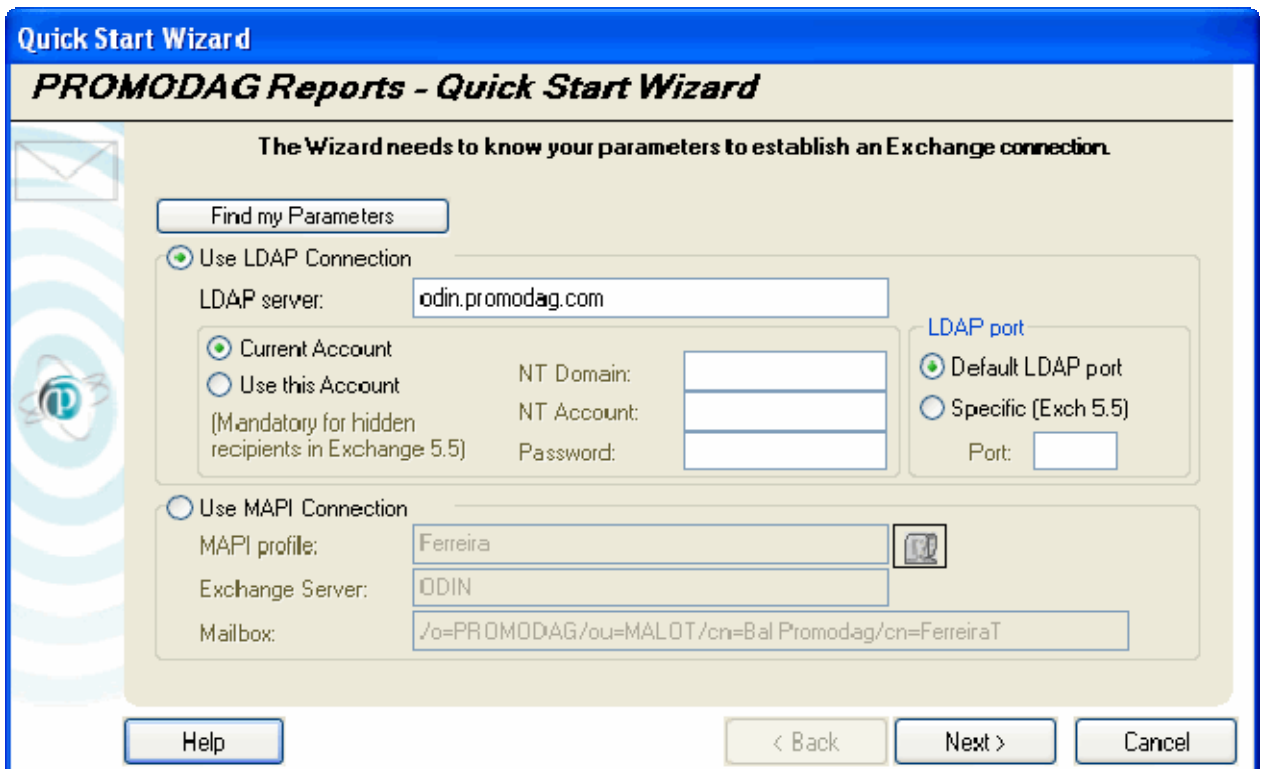
### Connecting to the Exchange directory

To find information about the desired Exchange organization, PROMODAG Reports connects to the Exchange directory.

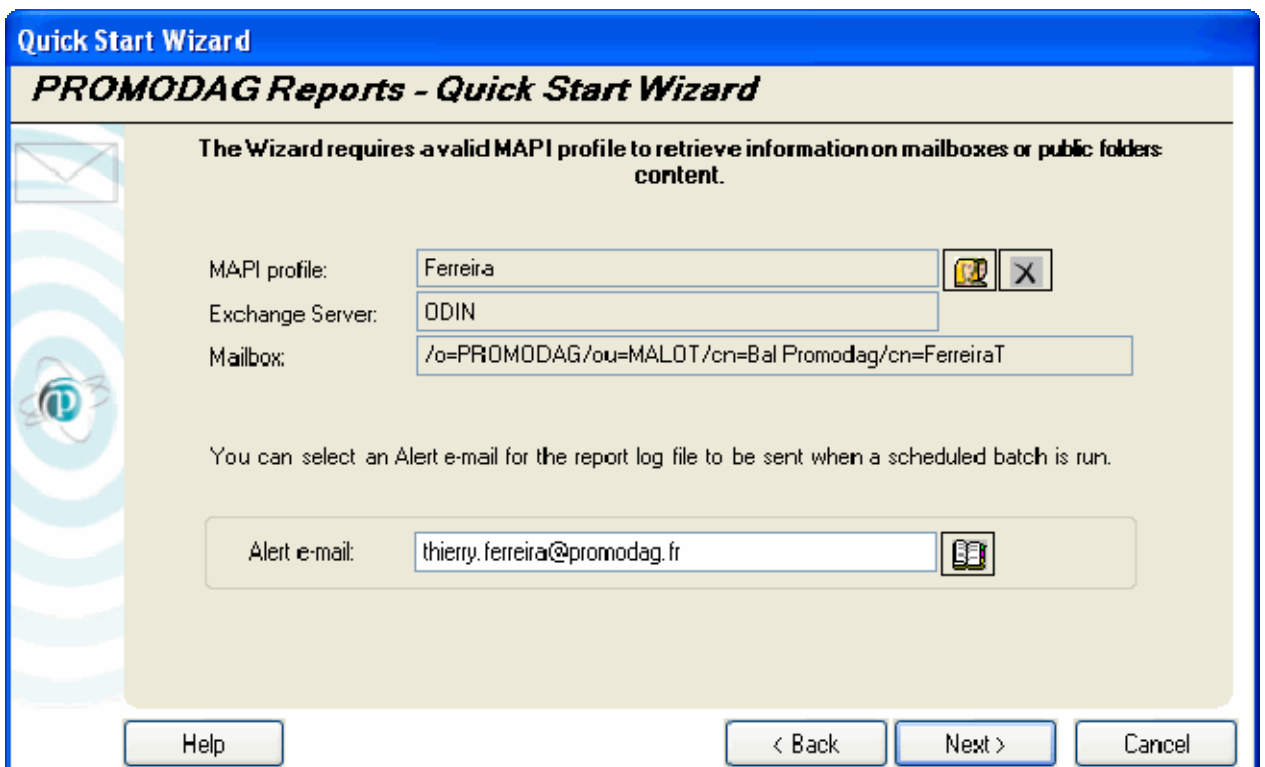
There are two methods for accessing the directory:

- LDAP is the preferred method, as it will retrieve more information about the Exchange organization: all servers and all administrative groups. Specific rights are required on the Exchange organization.
- MAPI does not require any specific rights on the Exchange organization. Outlook must be installed on the workstation with Collaboration Data Object (see requirements).

PROMODAG will check the LDAP settings. To accept the default parameters, click on the *Next* button.



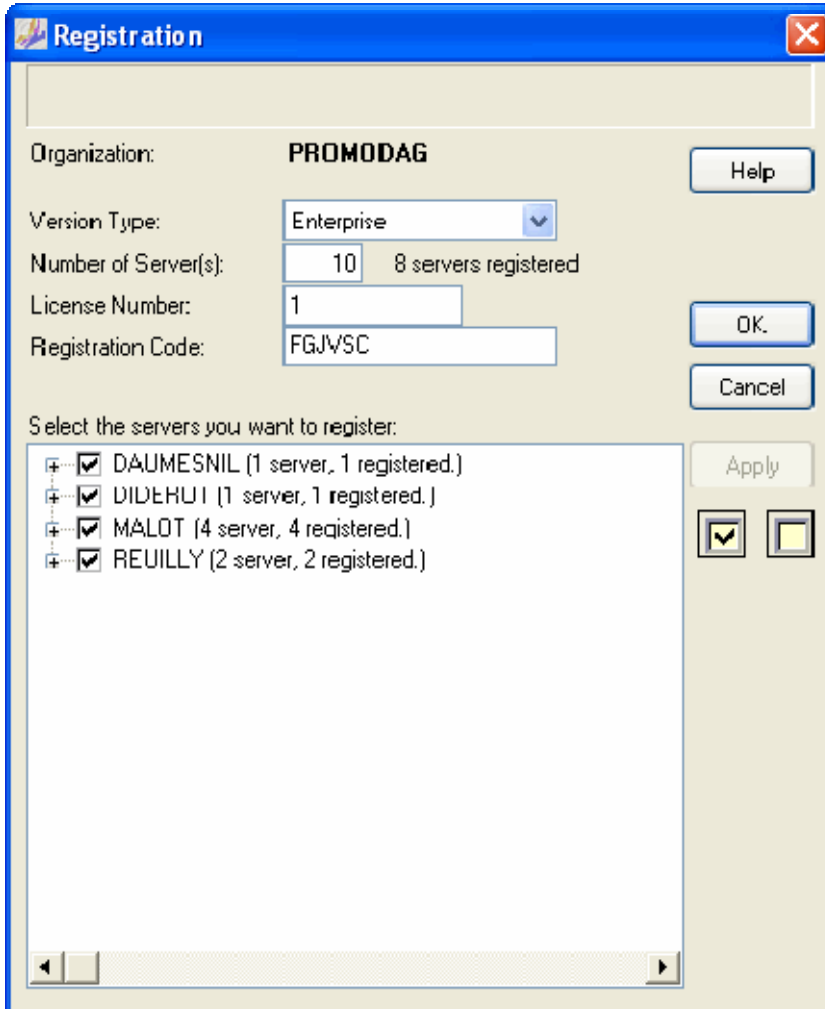
PROMODAG Reports checks your MAPI connection. To accept the default parameters, click on the *Next* button.



## Product registration

Enter the license information received from PROMODAG.

**NOTE: To use PROMODAG Reports in evaluation mode, click Cancel.**

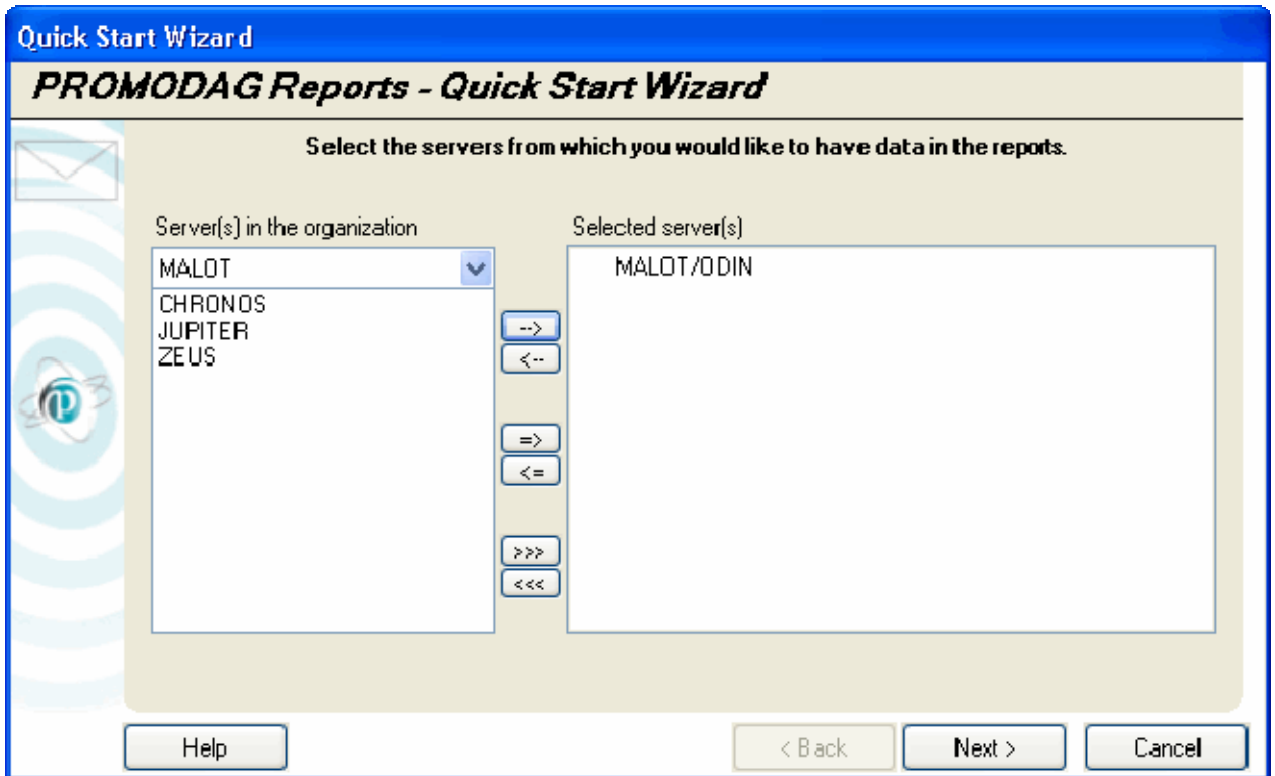


The image shows a Windows-style dialog box titled "Registration". It contains the following fields and controls:

- Organization:** PROMODAG
- Version Type:** Enterprise (dropdown menu)
- Number of Server(s):** 10 (text box) with "8 servers registered" displayed next to it.
- License Number:** 1 (text box)
- Registration Code:** FGJVSC (text box)
- Buttons:** Help, OK, Cancel, and Apply.
- Select the servers you want to register:** A list box containing four entries, each with a checked checkbox and a plus icon:
  - DAUMESNIL (1 server, 1 registered.)
  - DIDEHU I (1 server, 1 registered.)
  - MALOT (4 server, 4 registered.)
  - REUILLY (2 server, 2 registered.)

### Select report servers

To specify which server data is to be included in the reports, highlight the desired server name and click the arrow button to move that server to the right panel. All servers that display in the *Selected server(s)* panel will be included when PROMODAG Reports imports message tracking files.



## Report types

The database that contains message tracking files grows each time files are imported into the database. To keep the database small, define the specific kind of message tracking events to import.

**NOTE:** This setting can be changed later.

<b>Detail of Directory</b>	Select this option to generate reports that use detailed properties of Exchange recipients. This is useful if you are currently using these properties in your Exchange Directory.
<b>User Traffic</b>	This is the most common source of report.
<b>Replication Traffic</b>	Select this option to generate reports about replication traffic. Includes Directory and Public folders replication.
<b>Flow of Connectors</b>	Select this option to generate reports on your connectors flows.

**Quick Start Wizard**

**PROMODAG Reports - Quick Start Wizard**

Select the type(s) of report(s) you want to create.

- Detail of Directory
- User Traffic
- Replication Traffic
- Flow of Connectors

Help      < Back      Next >      Cancel

Report periods

Specify the desired period for the reports.

<b>From</b>	Date of the first message tracking file to import.
<b>To</b>	Date of the last message tracking file to import. The most recent date available is yesterday .
<b>Time zone</b>	All dates and times in Exchange message tracking files are expressed in GMT. Select the time zone.
<b>Reports language</b>	Select the language used to generate reports.

**Quick Start Wizard**

**PROMODAG Reports - Quick Start Wizard**

Select the period for the reports.

From: Sun 01 May 2005 To: Sun 22 May 2005

Indicate the time zone for which you want to make reports.

Time Zone: (GMT+01:00) Brussels, Copenhagen, Madrid, Paris

Adjust for daylight saving changes

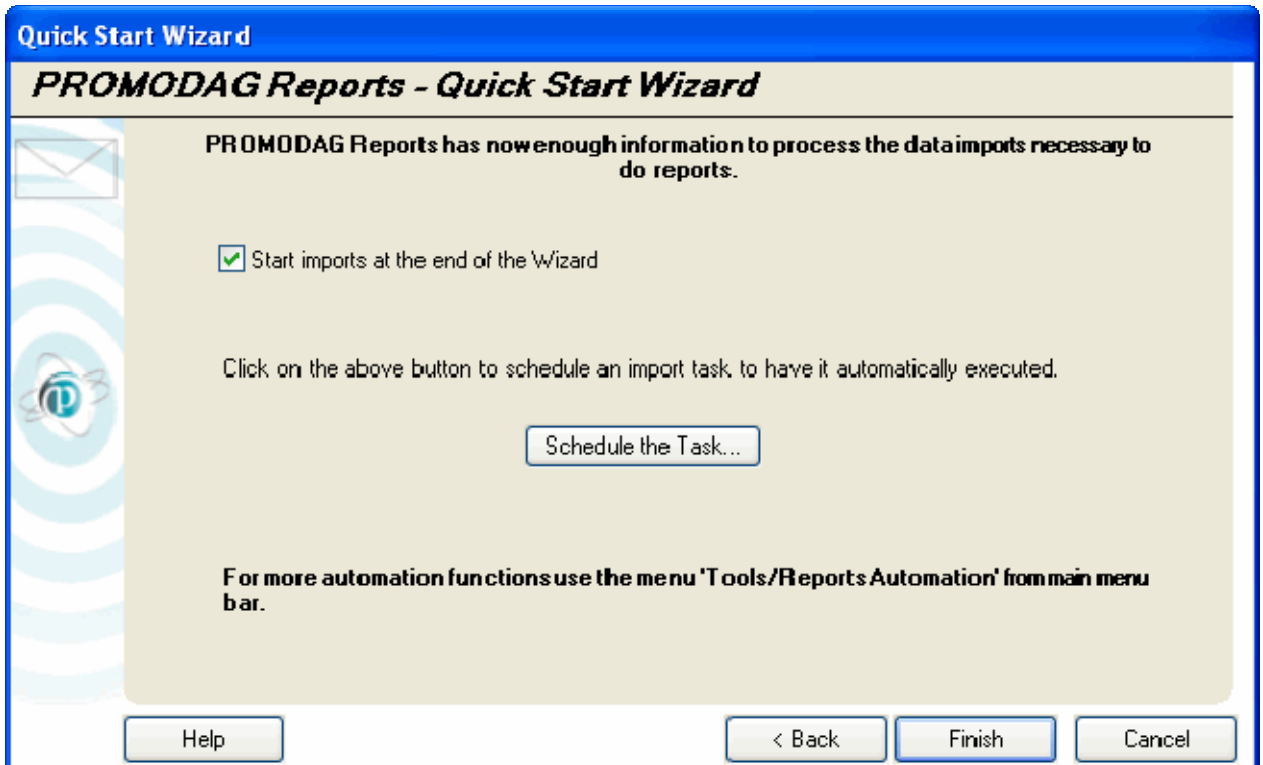
Reports language: <default language>

Help < Back Next > Cancel

## Processing imports

At this point, PROMODAG Reports has enough information to begin the import process. Depending on the desired run time for the reports, specify that the import process begin when the Wizard is finished, or schedule the import process for automatic run in the future.

Click *Finish* and the import process will begin as scheduled. PROMODAG Reports starts by importing the directory, then the message tracking files.



## Running the Originators and Recipients report

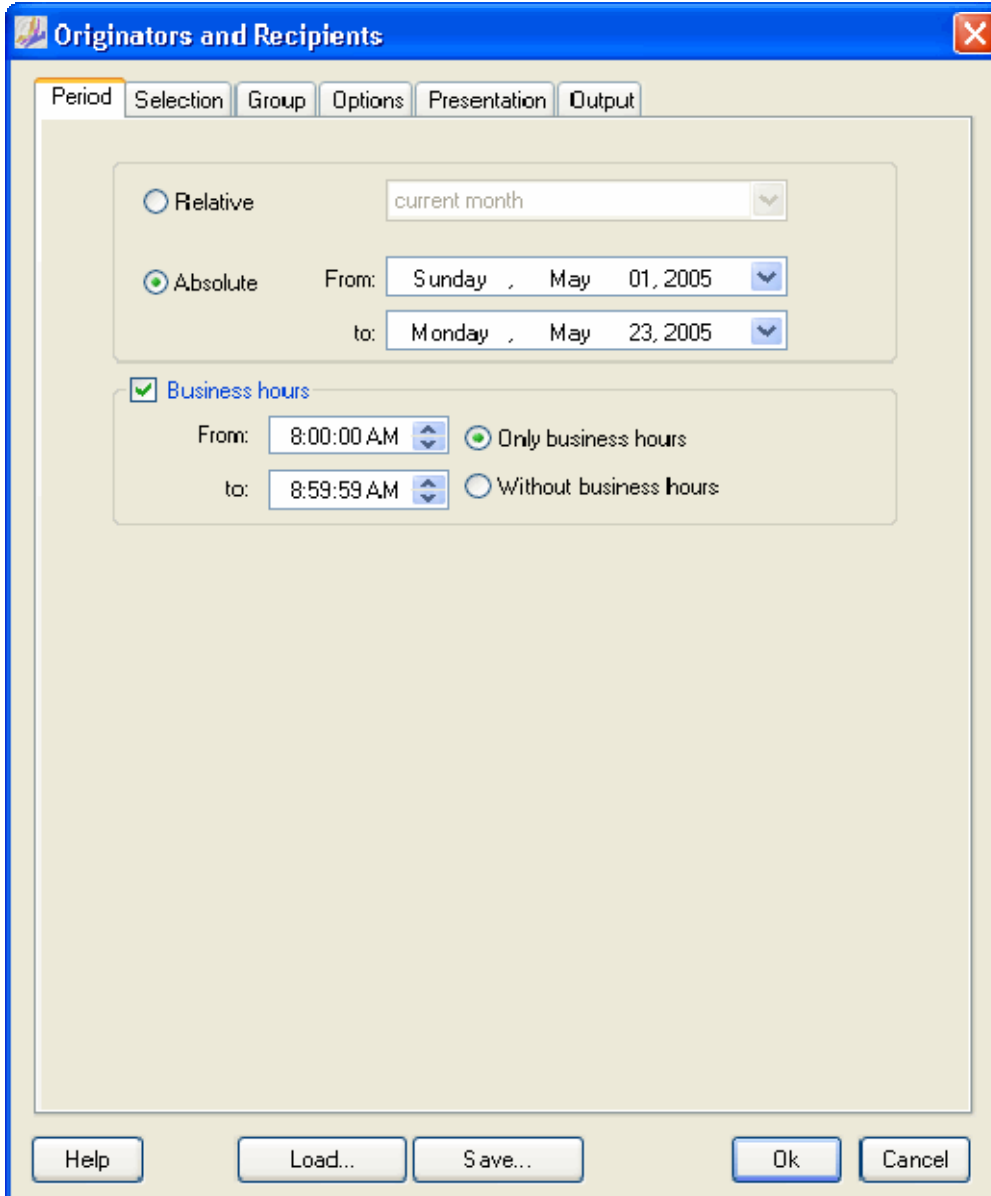
The Originators and Recipients report addresses the question, “Who sent the most messages during a specific period?”

To run the Originators and Recipients report, choose Reports > Traffic of Mailboxes > Originators and Recipients to access the report options. The Originators and Recipients dialog box contains different tabs, several of which are common to all reports.

### Period

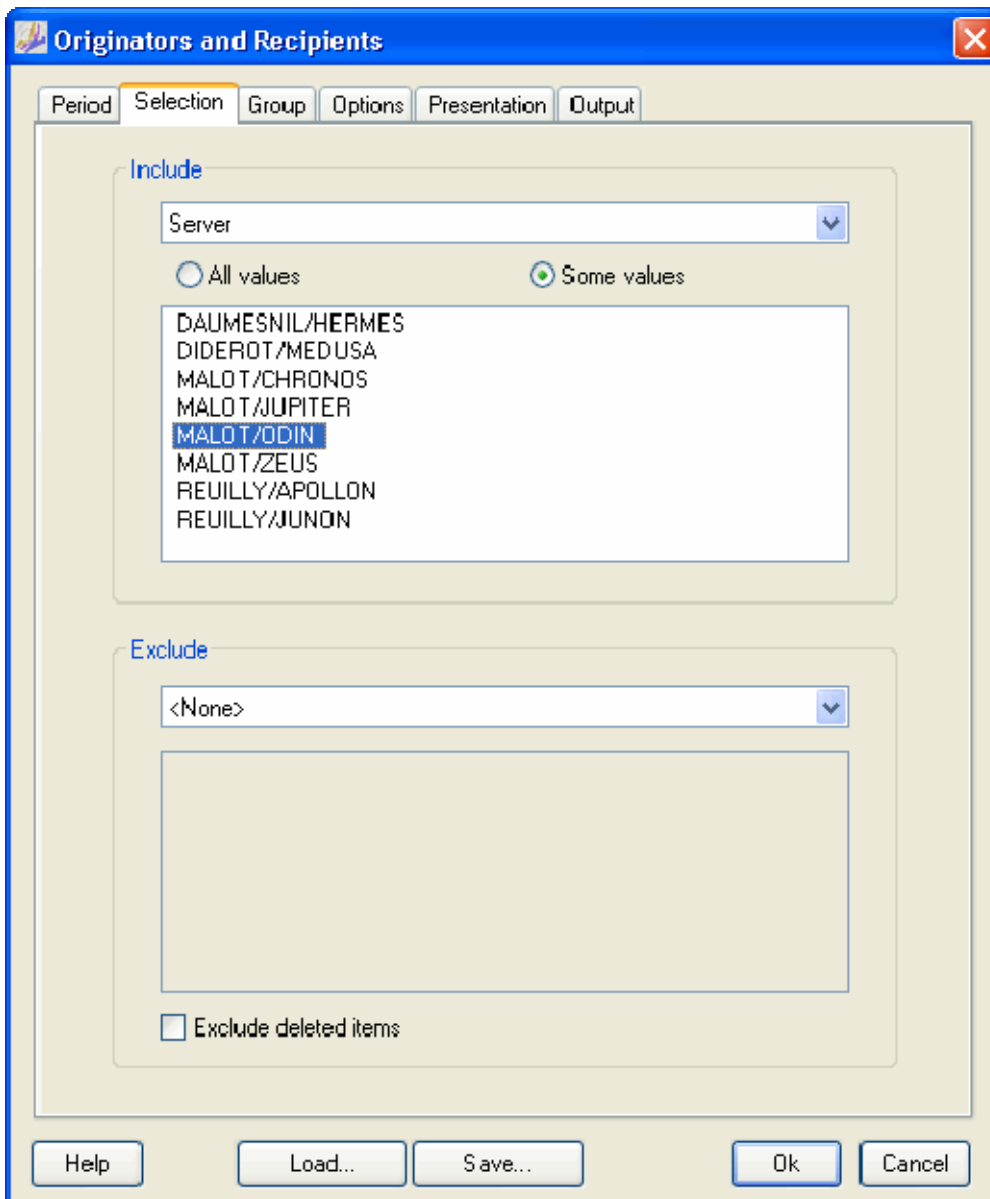
To select the date range from which to access data for the report, activate the *Absolute* button and enter the desired dates in the *From* and *To* fields.

**NOTE:** Be sure to choose a date range during which message tracking files were imported.



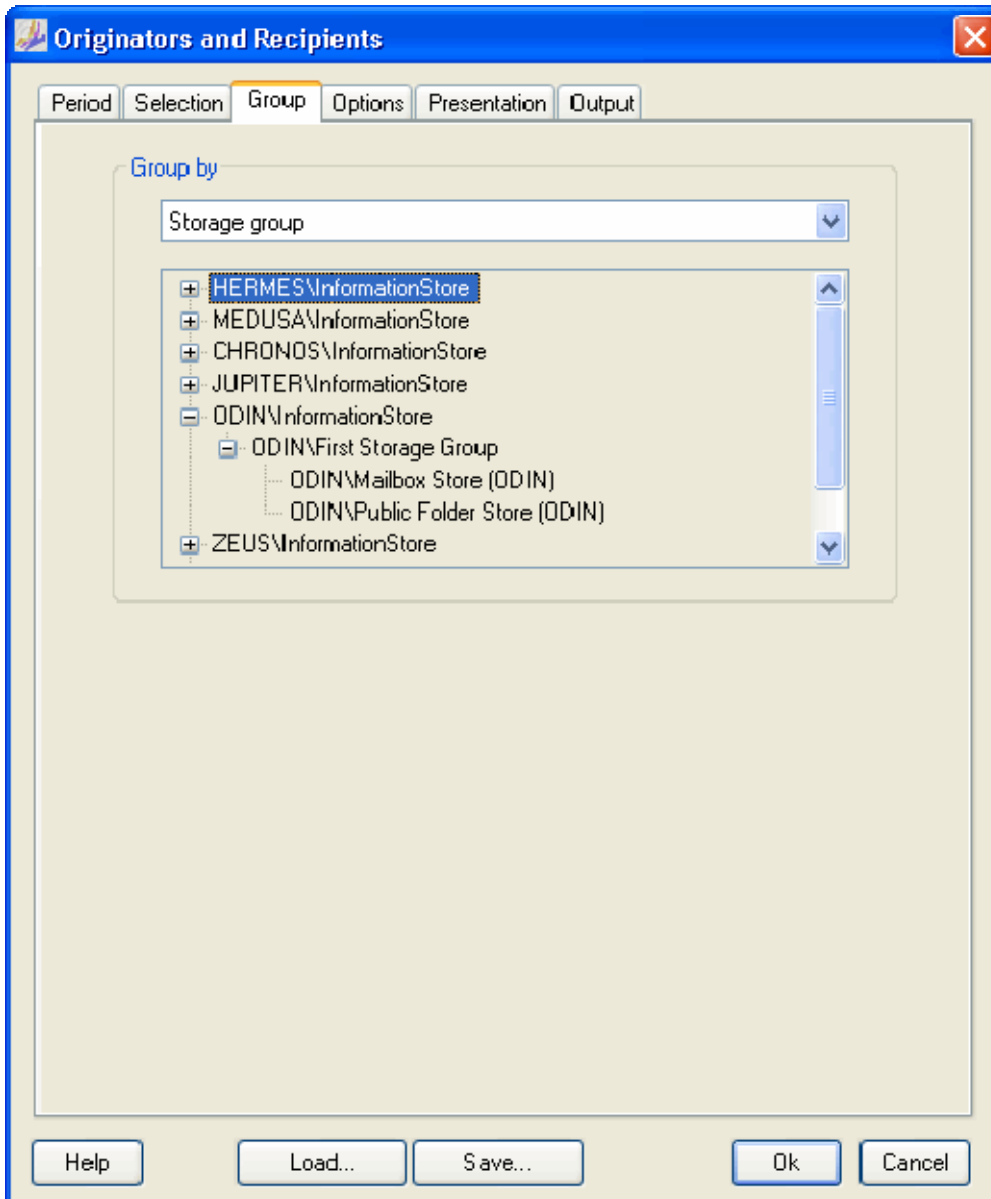
## Selection

On the *Selection* tab, select the desired criteria from the *Include* drop-down list. Then, specify either All values or a particular value to limit the mailboxes included in the report.



## Group

On the Group tab, select the desired grouping criteria from the *Group by* drop-down list.



## Options

On the *Options* tab, limit the Partner types to Internet messages only by selecting *Internet* from the *With* drop-down list.

**NOTE: When the same message is sent to multiple recipients, it can be counted either as one message or as the number of recipients.**

Set the options to define how the criteria should be sorted for the report.

The screenshot shows the 'Originators and Recipients' dialog box with the 'Options' tab selected. The dialog has a blue title bar and a close button (X) in the top right corner. Below the title bar are five tabs: 'Period', 'Selection', 'Group', 'Options' (highlighted), 'Presentation', and 'Output'. The main content area is divided into several sections:

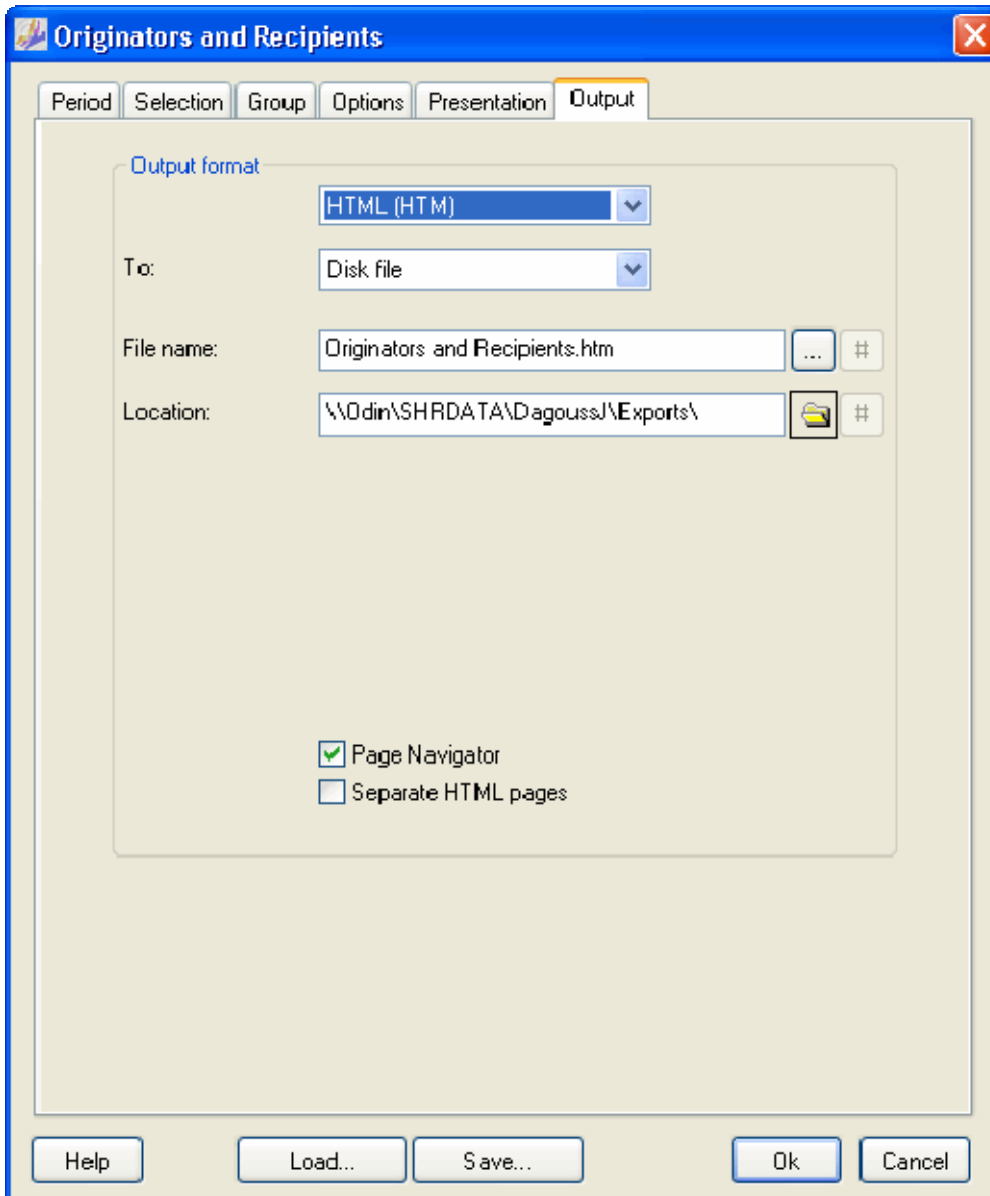
- Count a multiple sending as:** Two radio buttons: '1 message' (unselected) and 'n messages' (selected).
- Partner type:** Two dropdown menus: 'With:' set to 'Internet' and 'Partner:' set to '<all partners>'. Both have downward-pointing arrows.
- Sorting options:**
  - Radio buttons for 'Show top' with a text input '10':
    - 'biggest' (selected)
    - 'smallest' (unselected)
  - Radio buttons for 'Show where <= 10 K' (unselected) and 'Show where => 10 K' (unselected).
  - Radio buttons for 'From selection' (selected) and 'From groups' (unselected).
- Display options:**
  - Radio buttons for 'volume' (selected) and 'messages' (unselected).
  - Radio buttons for 'recipients' (unselected) and 'originators' (selected).
- Sort order:** Radio buttons for 'Ascending' (unselected) and 'Descending' (selected).
- Anonymous report:** A checkbox labeled 'Anonymous report' which is currently unchecked.

At the bottom of the dialog are six buttons: 'Help', 'Load...', 'Save...', 'Ok', and 'Cancel'.

Option	Description
Count multiple sending as	Determine whether a message sent to $n$ recipients is counted as 1 message sent or $n$ messages sent.
Partner type	
With	Type of partner to report for. After specifying a type of partner, a partner or a group of partners of this type can be selected.
Partner	Partner to report for. A partner can only be selected when a type of partner has been specified.
The selection criterion	
Comparison formula	Select one of the four options and enter the value to compare.
Population associated	The criterion can be associated with: <ul style="list-style-type: none"> <li>the selection (10 mailboxes maximum on the report)</li> <li>the group (Ex: 10 mailboxes maximum per group, if there are three groups, you can get 30 mailboxes maximum on the report)</li> </ul>
Volume and direction	
Data to compare	Select what kind of data to compare: volume or number of messages, for recipients or originators.
Traffic direction	Select the direction of traffic to compare: recipients or originator.
Sort order	Sort order can be defined only for <i>Show where</i> options. It is meaningless for <i>Show top</i> options.
Anonymous report	Check this option to get a report without mailbox names. The names will be replaced with a standard label and a counter. This is for confidentiality purposes.

## Output


On the *Output* tab, specify the Output format as an on-screen report, or export the report to various formats and destinations using the drop-down lists.




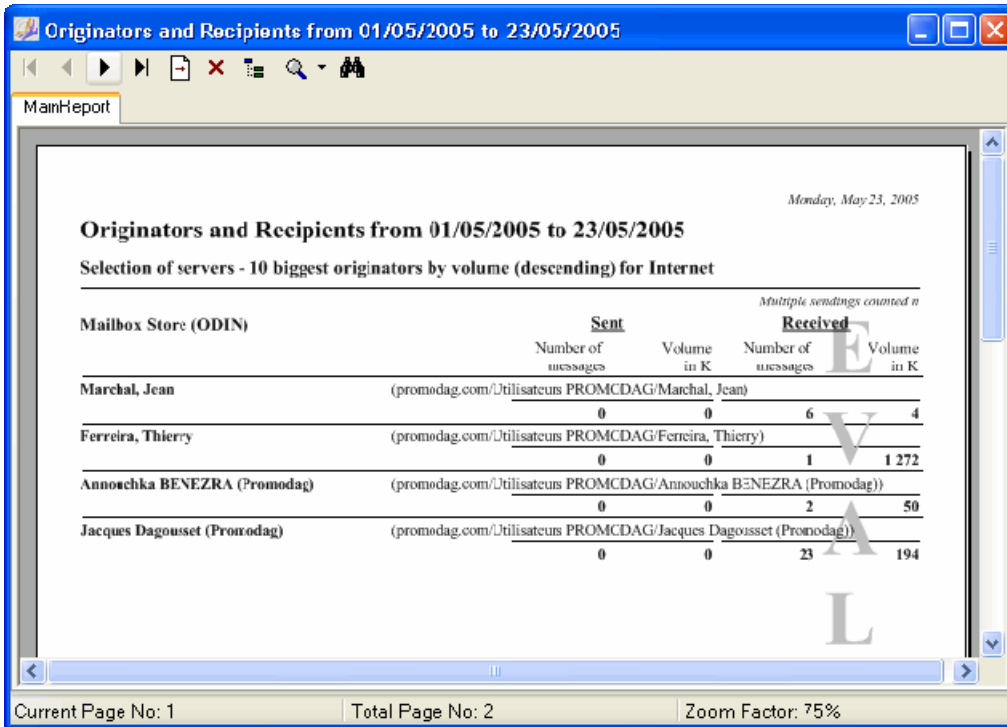
Generate the report

After setting all the report parameters, click the *OK* button to generate the report.

**NOTE: The report will appear in a preview window.**

To print the report, click on the *Printer* button .

To export the report, click on the *Export* button .



Monday, May 23, 2005

**Originators and Recipients from 01/05/2005 to 23/05/2005**

Selection of servers - 10 biggest originators by volume (descending) for Internet

*Multiple sendings counted as*

Mailbox Store (ODIN)	Sent		Received	
	Number of messages	Volume in K	Number of messages	Volume in K
Marchal, Jean (promodag.com/Utilisateurs PROMCDAG/Marchal, Jean)	0	0	6	4
Ferreira, Thierry (promodag.com/Utilisateurs PROMCDAG/Ferreira, Thierry)	0	0	1	1 272
Annouchka BENEZRA (Promodag) (promodag.com/Utilisateurs PROMCDAG/Annouchka BENEZRA (Promodag))	0	0	2	50
Jacques Dagousset (Promodag) (promodag.com/Utilisateurs PROMCDAG/Jacques Dagousset (Promodag))	0	0	23	194

Current Page No: 1      Total Page No: 2      Zoom Factor: 75%

## Advanced features

PROMODAG Reports has many advanced features, including the abilities to:

- Automate the import process
- Automate reports generation
- Add your report to the favorites menu

### Scheduling message tracking files and directory imports

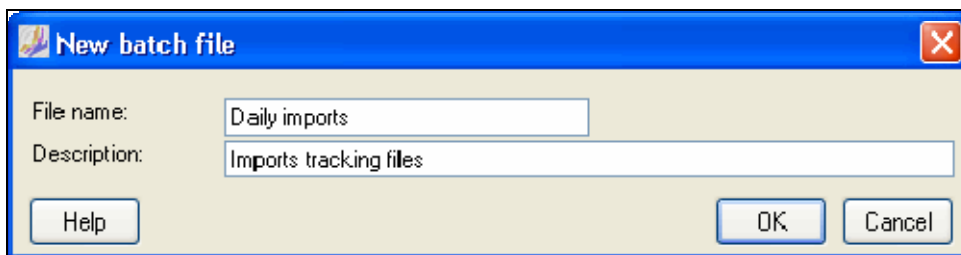
PROMODAG Reports can be set up to automatically import message tracking files and update the directory using these steps:

1. Create a batch file and choose what should be imported.
2. Schedule the batch file using Windows standard scheduler.

#### Creating a batch file

To create a batch file, select Tools > Reports Automation to access the automation screen. Click the *New batch* button and enter a file name and description.

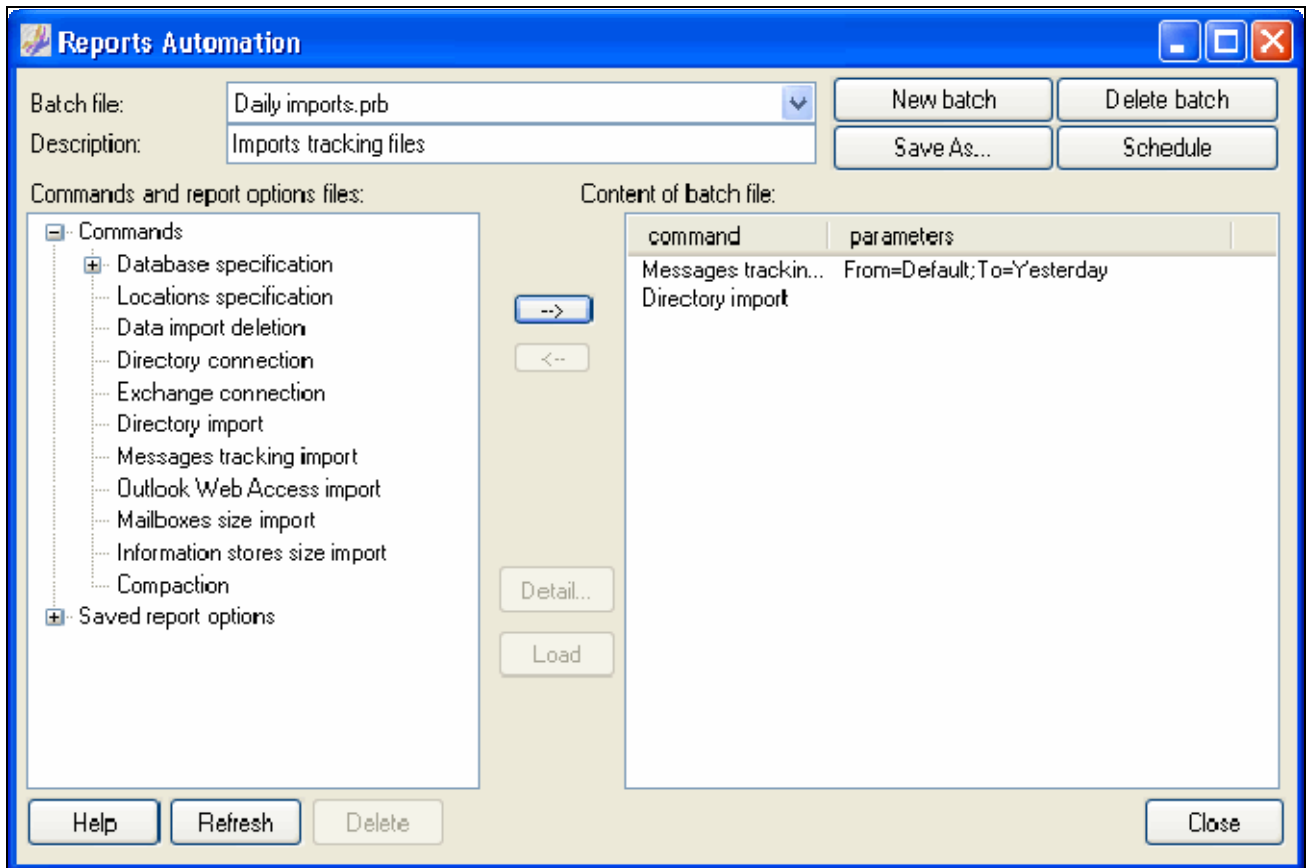
**NOTE:** By default, the file is saved under the **Batches** subdirectory of **PROMODAG Reports**.



#### Exploring the available commands

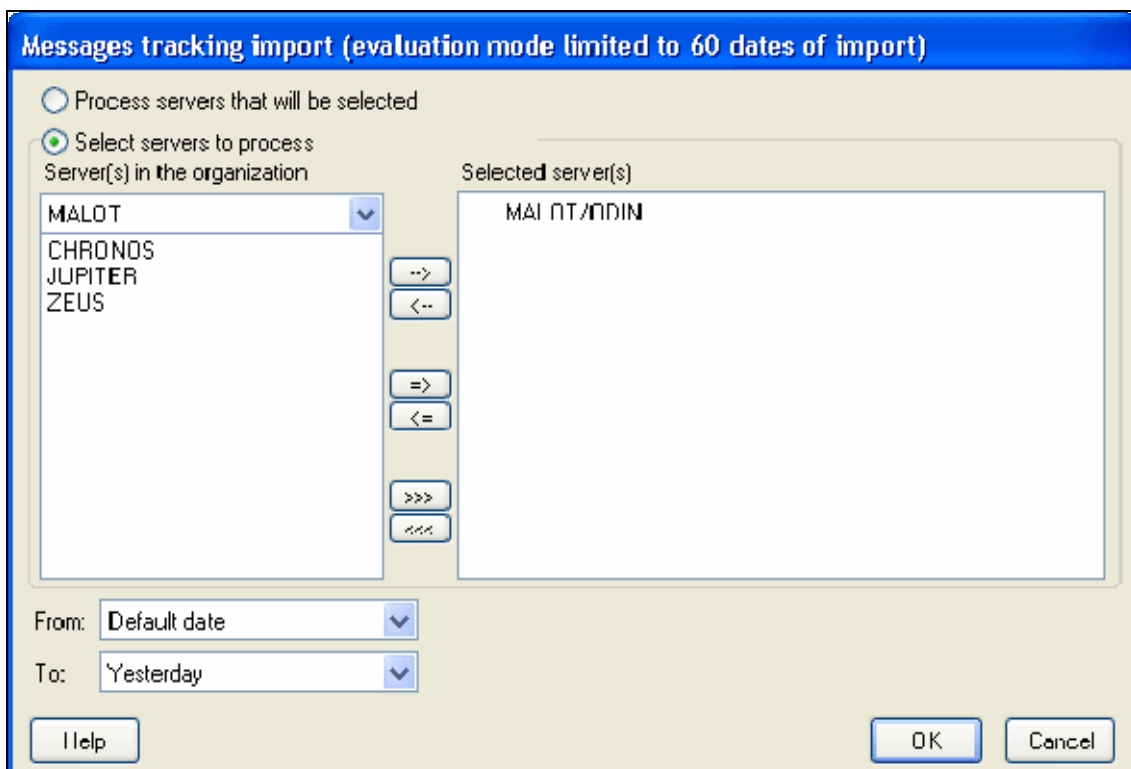
In the *Commands and report options files* listing, click to expand the *Commands* list to find the available commands that can be automated:

- Database specification: choose a specific database to be used when the batch runs.
- Locations specification: choose where trace file will be generated.
- Data import deletion: delete old messages from the database
- Directory connection : choose the specific directory connection used by the batch
- Exchange connection : choose the specific Exchange connection used by the batch
- Directory import: import or update the Exchange directory
- Message tracking import : import message tracking files
- Outlook Web Access import: import IIs log files
- Mailboxes size import: import the size of mailboxes
- Information stores size import: import the size of the information stores
- IMC archives import: import archives of the Internet mail connector
- Compaction: compact an Access database



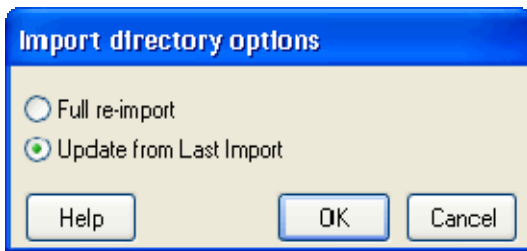
### Adding the Data import command

In the *Commands* listing, select the *Message tracking import* command then click the → button. The default options will import messages tracking files for your servers from the last import date up to yesterday. Click on OK.



Adding the Directory import command

In the Commands listing, select the *Directory import* command then click the → button. The default options will update the directory with new and modified recipients. Click on OK.



Scheduling the batch

See next chapter, *Scheduling a batch file*.

Scheduling reports generation

PROMODAG Reports can be set up to automatically generate reports using these steps:

1. Create a report option file by selecting the report and its options.
2. Create a batch file and select the report options files used to generate the reports.
3. Schedule the batch file using Windows standard scheduler.

Creation of a report options file

Select a report from the Reports main menu. Enter the configuration options for the report and click the Save button on the report configuration screen to create the report options file.

**NOTE: By default, the file is saved under the Batches subdirectory of PROMODAG Reports.**

Creation of a batch file

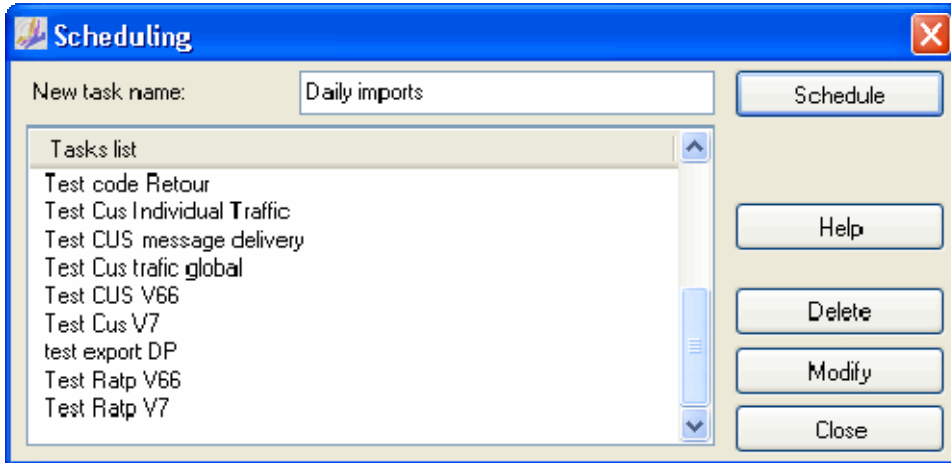
To create a batch file, select Tools > Reports Automation to access the automation screen and click the *New batch* button. Enter a file name and description.

**NOTE: By default, the file is saved under the Batches subdirectory of PROMODAG Reports.**

### Scheduling a batch file

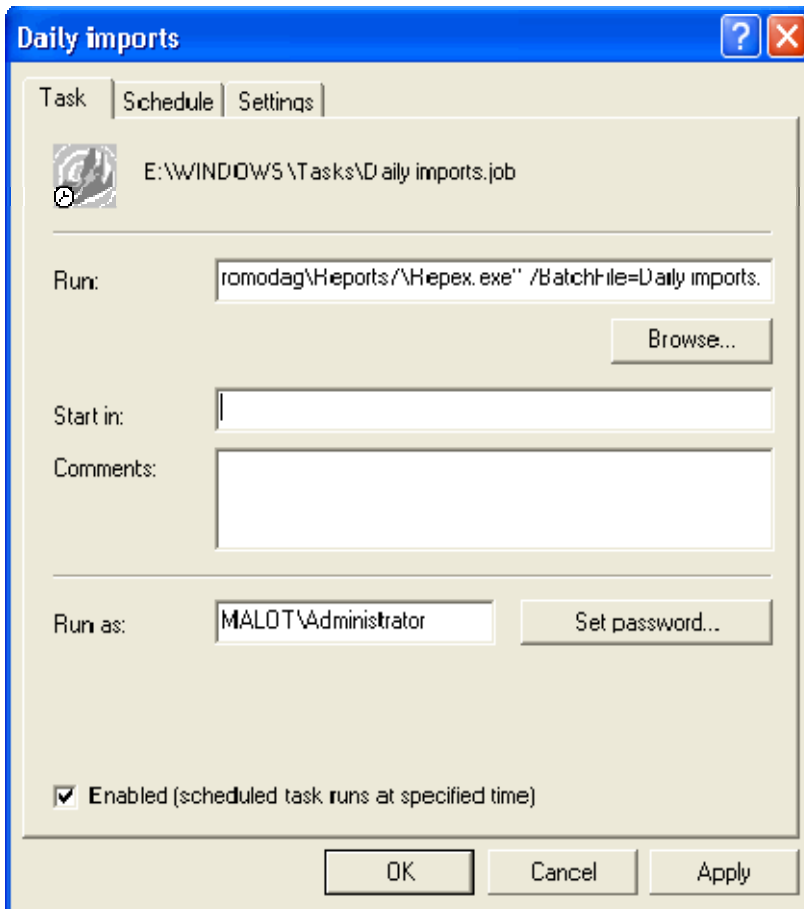
To schedule a batch file, select Tools > Reports Automation to access the automation screen. From the Batch file list, select a batch file to schedule and click on the *Schedule* button.

**NOTE:** This function uses the standard Windows Task Scheduler. For more information on how it works, refer to Microsoft help.



Verify that the account shown in the *Run as* field is the same as the one used for PROMODAG Reports in interactive mode. Click the *Set password* button to set a password.

To create a new schedule, activate the *Schedule* tab.



## Running the batch

At the time designated by the schedule, PROMODAG Reports executes and processes the commands included in the batch.

**Warning: There should not be another instance of PROMODAG Reports running. If you are running PROMODAG in interactive mode, the batch will not run.**

When the batch runs, PROMODAG Reports creates a trace file that contains information on what occurred. The trace file can be emailed automatically.

## PROMODAG Reports trace files

PROMODAG Reports trace files are text files created in the logs subdirectory of PROMODAG (C:\Documents and Settings\All Users\Application Data\Promodag\Reports\7\Logs).

The name of the trace files are:

- **RepexYYYYMMDD-HHmss.xml**
- **RepexYYYYMMDD-HHmss.log** where YYYYMMDD-HHmss is the date and time when the sessions starts.

It may happen that an error occurs very early in the program, before the session is correctly started. In this case there will be a description of the error in the file '**ErrorYYYYMMDD.log**' in the directory of the application's executable.