

# Quick configuration guide

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## Document summary

This guide is intended for users who are new to Exchange Reporter Plus. It can be used for evaluation purposes or to quickly set up Exchange Reporter Plus in your environment. This guide covers the following topics:

- What is Exchange Reporter Plus
- System requirements
- How to install Exchange Reporter Plus
- How to start and log in to Exchange Reporter Plus
- How to add an Exchange server, Exchange Online tenant, or a Skype for Business server for data collection
- Using the predefined reports

**Note:** This guide covers only the basic configuration options. For a detailed guide on how to set up and use Exchange Reporter Plus, please refer to our Resources Center.

## Exchange Reporter Plus overview

ManageEngine Exchange Reporter Plus is a reporting, change auditing, monitoring, and content search tool for Exchange Server, Exchange Online, and Skype for Business Server. It features more than 450 unique reports on various Exchange entities such as mailboxes, email traffic, public folders, Outlook Web Access, and ActiveSync, along with reports featuring usage and configuration details about Skype for Business Server. Exchange Reporter also audits activities in Exchange servers and Exchange Online, and can send real-time email alerts.

### **All-inclusive reporting:**

Get complete information about all components in your Exchange and Skype for Business environments, including mailboxes, distribution lists, and public folders.

### **Granular change auditing:**

Audit Exchange event logs effortlessly. Track and report on non-owner mailbox access, mailbox logon activity, changes to mailbox permissions and server configurations, and more.

### **Vigilant monitoring:**

Retrieve information about the health and status of components and services in your Exchange servers. Monitor Exchange email queues, database availability groups (DAGs), server storage, and more.

### **Instant content search:**

Perform pattern, attribute and keyword-based searches in several or all of your organization's mailboxes. Download attachments directly and view mail content in HTML format to keep a check on them.

For a quick look at some important aspects of Exchange Reporter Plus, refer to the [product datasheet](#).

# System requirements

## Hardware requirements

Hardware	Minimum
Processor	Intel Core i3
RAM	4GB
Disk space	10 to 20 GB Note: The storage space requirements might vary depending upon your organization size, mailbox size, traffic volume, Outlook Web Access logins, and mailbox and organization property changes.

To calculate an appropriate estimate of the hard disk space you might need, use the table below:

Number of users	Number of days	Total size
1	1	37KB
1,000	100	37 x 1,000 x 100 = 3,700,000KB (or 3.7GB)

**Tip:** Use the Archive Settings (**Settings > Configuration > Exchange Server > Archive Settings**) to archive the reports and free up disk space as you prefer.

## Port Requirements

Source Hostname	Destination Hostname	TCP Port	Description/Reason
Exchange Reporter Plus	Exchange Servers	135	RPC
		5985	Windows Powershell Default psSession Port
		5986	Windows Powershell Default psSession Port
		80	Powershell
		443 (SSL)	Powershell
	Active Directory	389	LDAP
		636	LDAP SSL

		3268	LDAP GC
		3269	LDAP GC SSL
		53	DNS
		88	Kerberos
		139	Net Bios

## Software requirements

### Supported platforms

- Windows 7
- Windows 8
- Windows 8.1
- Windows 10
- Windows Server 2003
- Windows Server 2008
- Windows Server 2008 R2
- Windows Server 2012
- Windows Server 2012 R2
- Windows Server 2016
- Windows Server 2019
- Lync Server 2013
- Skype for Business Server 2015
- Skype for Business Server 2018

### Supported Exchange Servers

- Exchange Server 2003
- Exchange Server 2007
- Exchange Server 2010
- Exchange Server 2013
- Exchange Server 2016
- Exchange Server 2019

### Supported browsers

- Internet Explorer 9 and above
- Firefox 45 and above
- Google Chrome 45 and above

Preferred screen resolution 1024 x 768 pixels or higher

### Supported databases

- MS SQL and
- PostgreSQL (comes bundled with the product)

## Prerequisites for installation

### For Exchange Server

1. Install Windows Management Framework (which contains Windows PowerShell and Windows Remote Management).
- Note:** In Windows Server 2008 R2 and above, Windows Management Framework is installed by default.
2. Install Microsoft .NET Framework 3.5 Service Pack 1 or above.
3. Install Microsoft Exchange Web Services Managed API 2.2.
4. Install MAPI to extract mailbox size and content-related data for Exchange Server versions 2003 and 2007.
5. Enable csCookie. (Refer to the [Appendix](#) for instructions)
6. For mailbox and public folder content reports: The user account that you use to configure the Exchange server in Exchange Reporter Plus must have a valid mailbox that is not hidden from the global address list. The user must also have logged into the mailbox at least once.
7. Ensure there's a valid mailbox for MAPI Profile (applies only for Exchange Server 2003 and 2007 versions).

### For Exchange Online

1. Install Azure Active Directory PowerShell module.
2. Install MSOnline PowerShell module.
3. Install Microsoft Online Service Sign-in Assistant.

### For Skype for Business

1. Exchange Reporter Plus requires [.NET Framework 3.5 Service Pack 1](#) for Skype for Business reporting.

Exchange Reporter Plus supports Skype for Business reporting function in the following platforms:

- Windows 7 and above
- Windows Server 2008 R2 and above

## Privileges required for Exchange Reporter Plus

Exchange Reporter Plus collects data from Active Directory, Exchange Server, Exchange Online, and Skype for Business Server for generating reports, alerts, etc. To collect all the necessary data without issue, you must configure Exchange Reporter Plus with a user account that has been assigned all the necessary privileges.

Refer to the table below for the exact privileges required by Exchange Reporter Plus.

Features	Privileges required
Exchange Server reporting, auditing, and monitoring	The user account must be a member of the: <ul style="list-style-type: none"> <li>• Domain Admins group</li> <li>• Organization Management group</li> </ul>
Exchange Online reporting and auditing	The user account must have a: <ul style="list-style-type: none"> <li>• Global Administrator role</li> </ul>
Skype for Business Server reporting	The user account must be a member of the: <ul style="list-style-type: none"> <li>• CsAdministrator or CsViewOnlyAdministrator group</li> </ul>

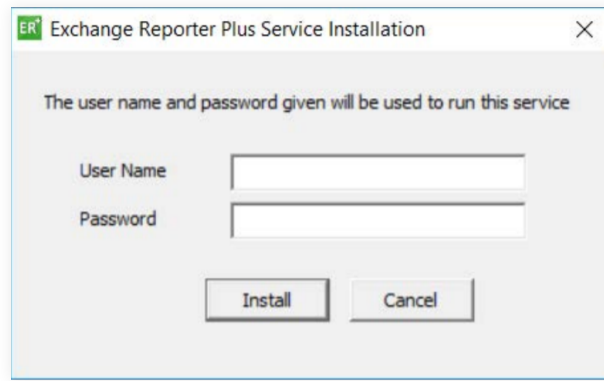
## Installing Exchange Reporter Plus

1. [Download](#) Exchange Reporter Plus.
2. Double-click the downloaded EXE file to start the InstallShield Wizard.
3. Follow the instructions displayed on the InstallShield Wizard to complete the installation.

**Note:** If you have already installed Exchange Reporter Plus, use the [Service Pack](#) to update to the latest version.

### Installing Exchange Reporter Plus as a Windows service

1. Click **Start > Programs > Exchange Reporter Plus > Service > Install Exchange Reporter Plus Service**.
2. When you install the Exchange Reporter Plus Service, the following dialog box will appear:



3. Please provide the credentials of a user who has administrative privileges on the local machine where the product is installed.

Once the Exchange Reporter Plus Service is installed, you can start the product as a Windows service.

## Starting Exchange Reporter Plus

Once Exchange Reporter Plus is successfully installed, a shortcut will be added to the desktop.

To start Exchange Reporter Plus:

1. Double-click the desktop icon. Exchange Reporter Plus will open in a web browser.
2. It can also be started from: **Start > Programs > Exchange Reporter Plus > Start Exchange Reporter Plus.**
3. If Exchange Reporter Plus is installed as a Windows service, then start it using the Windows Services Manager (services.msc) tool.

## Accessing Exchange Reporter Plus

**Note:** Ensure Exchange Reporter Plus is running.

1. Open a web browser and type **http://<hostname>:<port number>** in the address bar.
  - **Hostname:** IP address or hostname of the machine in which Exchange Reporter Plus is installed.
  - **Port number:** The port number used by Exchange Reporter Plus. By default, it is 8181.
2. Or, double-click the desktop icon again to open Exchange Reporter Plus in a web browser.
3. If the product has already been started as an application, you can launch it by right-clicking the system tray icon of Exchange Reporter Plus and selecting **Start Client.**



## Stopping the product

1. Click **Start > Programs > Exchange Reporter Plus > Stop Exchange Reporter Plus**.
2. If the product is running as an application, you can also stop it by right-clicking the system tray icon of Exchange Reporter Plus and selecting **Shutdown Server**.

## Logging in to Exchange Reporter Plus

1. In the login screen of Exchange Reporter Plus, enter the **Username** and **Password**.

**Note:** If you're logging in to Exchange Reporter Plus for the first time after installation, use **admin** as both the username and password.

2. Click **Login**.

You can change the default password by following the steps below:

- Go to **Settings > Admin > Utilities > User Management**.
- Under the **Actions** column, click the **edit** icon next to the admin account.
- Click **Edit Password**.
- Enter the **new password**, then enter it again to confirm it.
- Click **Save**.

## Configuring Exchange Server, Exchange Online, and Skype for Business Server for data collection

To start collecting data, you need to first add an Exchange Server, an Exchange Online tenant, or a Skype for Business Server in Exchange Reporter Plus.

### Adding an Exchange Server

1. Log in to **Exchange Reporter Plus** as an admin.
2. Click the **Org/Tenant Settings** button at the top right corner of the web console.

The screenshot shows the Exchange Reporter Plus web console. The top navigation bar includes 'Dashboard', 'Reports', 'Audit', 'Monitoring', 'Content Search', 'Settings', and 'Support'. The 'Org/Tenant Settings' button is highlighted with a red box. The main content area displays several dashboards: 'Delivered Vs Undelivered', 'Mailbox Details' (showing Inactive: 41, Recently Created: 0, Others: 0), 'Admin Audit Changes Count', 'OWA Logons', and 'Organization Health'. The 'Organization Health' table is as follows:

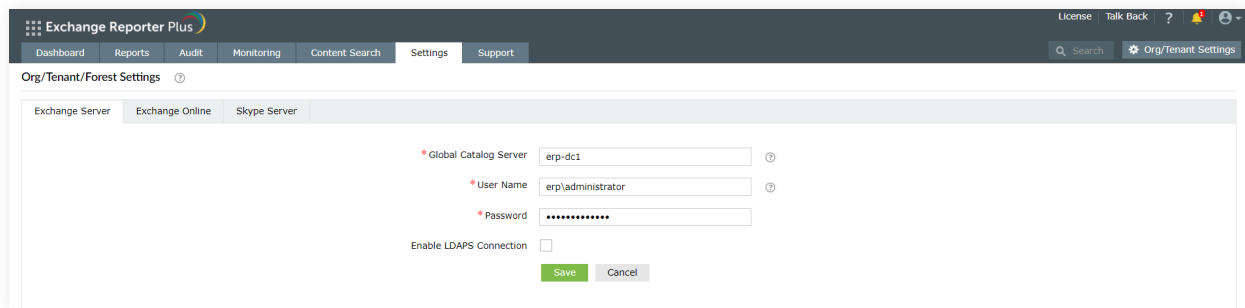
Server Name	Services Status	Disk Usage Status	Mailflow Status	Email Queue Status	Client Connectivity Status
ERPEX2016-EX2	-	Warning	-	-	-
ERPEX2016-EX1	-	Critical	-	-	-

The 'Recent Alerts' section shows 0 Critical, 0 Trouble, and 60 Attention alerts.

3. Under the **Exchange Server** tab, click **Add New Organization**.
4. Enter the **Global Catalog Server** name.

**Note:** If the Exchange Server is within your forest, the Exchange organization will be added automatically.

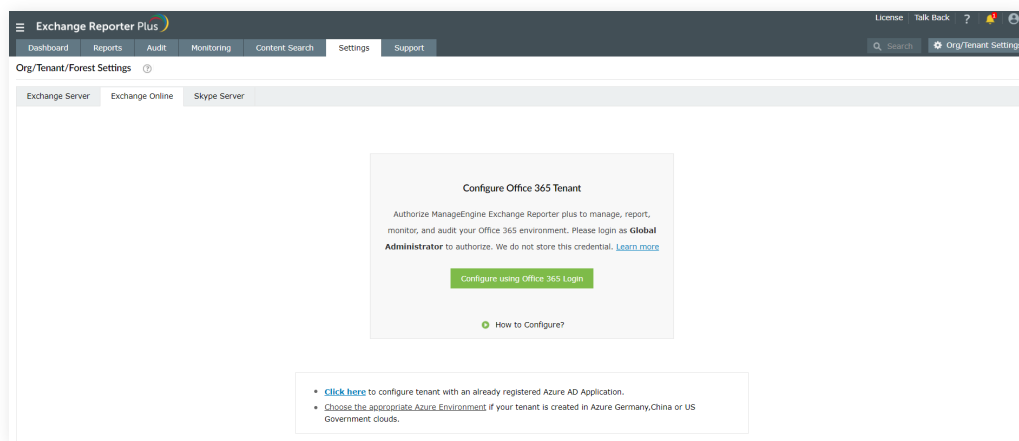
5. Enter the **Username** and **Password** of a user account with [appropriate privileges](#).



6. Click **Save**.

## Adding an Exchange Online tenant

1. Log in to Exchange Reporter Plus as an admin.
2. Click the **Org/Tenant Settings** button at the top-right corner of the web console.
3. Under the **Exchange Online** tab, click **Add New Tenant**.
4. Choose **Configure using Office 365 Login** and click **Proceed**.



5. Log in to the Office 365 tenant account using the account credentials.

## Adding a Skype for Business Server

1. Log in to Exchange Reporter Plus as an admin.
2. Click the **Org/Tenant Settings** button at the top right corner of the web console.
3. Under the **Skype Server** tab, click **Add New Forest**.

## Adding a Skype for Business Server

4. Enter the **Global Catalog Server** name.

**Note:** If the Skype for Business Server is within your forest, the Global Catalog Server name will be updated automatically.

5. Enter the **Username** and **Password** of a user account with [appropriate privileges](#).

6. Click **Save**.

## Delegating access to technicians

Now that Exchange Reporter Plus has been configured to collect data, it will start generating reports and alerts. You can allow other users, such as help desk technicians, to access the reports by assigning them one of the two roles available in Exchange Reporter Plus.

**Admin role:** Users assigned this role have full control over the product. They can view and generate reports, modify audit and alert configurations, assign or modify roles of other users, and more.

**Operator role:** Users assigned this role can only view the reports.

The user can be either an existing Active Directory user, or you can create a new Exchange Reporter Plus user who exists only within the realm of the product. AD users can log in with their domain username and password, and Exchange Reporter Plus users need to use the username and password entered by the admin during user creation.

You can also enable, disable, delete, or change the role of users anytime you want.

To delegate access to users:

1. Go to the **Settings** tab.
2. Select **Admin > Utilities > Technicians** in the left pane.
3. Click the **Add New Technician** option found in the top-right corner.
4. In the window that appears, select an **Authentication type** from the drop-down.

- For **Product Authentication** type, enter a **Username** and **Password** for the technician account you are about to create. Confirm the password once again.

For **Active Directory Authentication**, click the add button next to the **Username** field to find and add the Active Directory user as the technician.

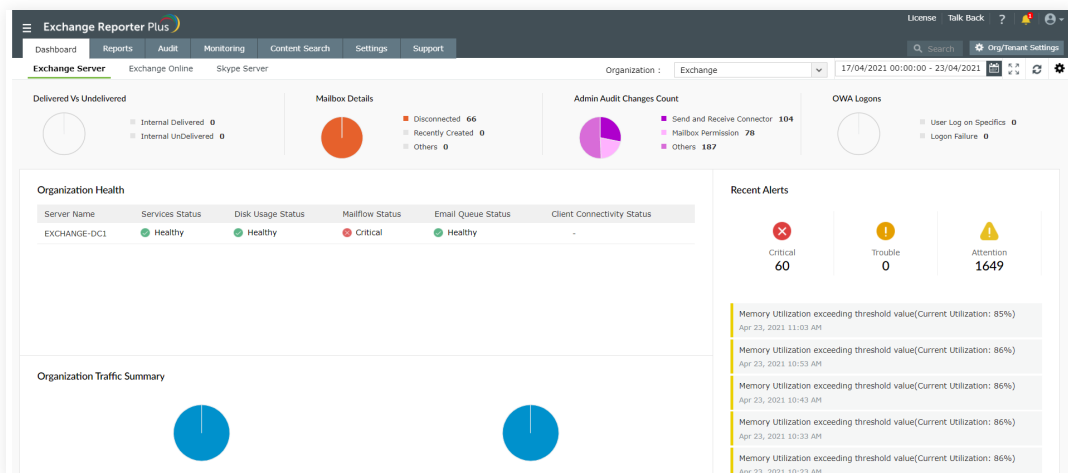
- Select a **Role** from the list of roles available. The drop-down menu shows both default and custom roles.

- You can also delegate suitable **Organization, Tenants, and Forests** to be monitored and accessed by the technician.
- Check the boxes next to **Allow to export reports** and **Allow to edit technicians' passwords** if you want to enable those options.
- Click **Add**.

**Note:** The default admin account with Exchange Reporter Plus authentication cannot be deleted or modified.

## Exchange Reporter Plus dashboard

When you log in to the product, you will land on the dashboard of Exchange Reporter Plus. The dashboard provides a graphical summary of the most important aspects of your on-premises Exchange Server, Exchange Online, and Skype for Business Server environments.

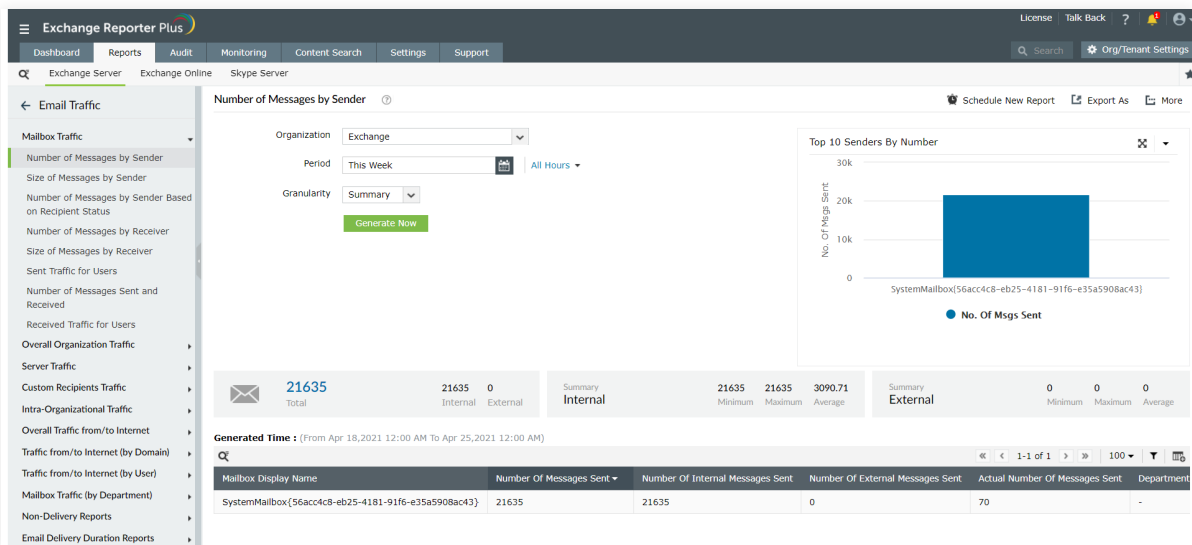


## Using the reports

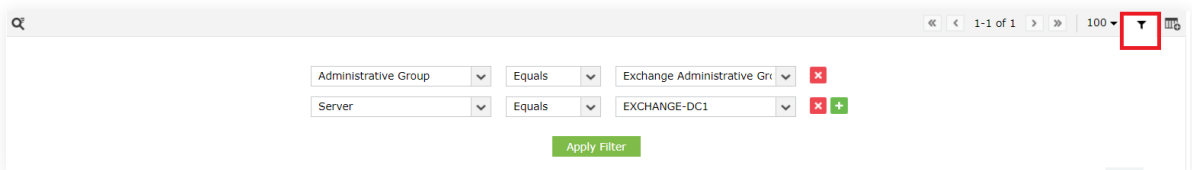
With over 500 predefined state-in-time, audit, and monitoring reports, Exchange Reporter Plus provides you complete visibility into your Exchange on-premises, Exchange Online, and Skype for Business environments.

To access a report:

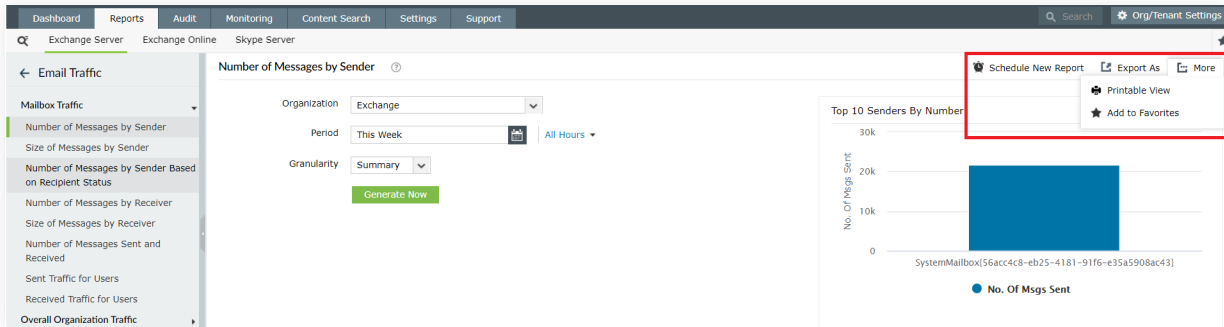
1. Log in to **Exchange Reporter Plus** as an admin or operator.
2. Go to the **Reporting** tab.
3. Choose a **report category**, i.e., Email Traffic.
4. Click a **report** from the list, i.e., Number of Messages by Sender.
5. Choose **Exchange Organization** from the drop-down, and specify the period.
6. Click **Generate Now**.
7. The Number of Messages by Sender report will show you the top 10 senders for the specified period in an easy-to-understand graph. The report will also contain a comprehensive table containing more information.



8. You can apply filters to pare down the report until it shows only the information you need.



9. To receive the report periodically to your inbox, use the **Schedule New Report** option.
10. Use the **Export As** option to save the report in HTML, PDF, XLS, or CSV file formats.
11. To print the report or add it to your favorites, use the **More** option.



## Appendix

### Steps to enable csCookie

1. Open the **Run** dialog box and enter **inetmgr**.
2. In the left pane, expand the **machine name > Sites**.
3. Click **Default Web Site**.
4. In the middle pane, double-click **Logging**.
5. In the right pane, under **Actions**, click **Enable**.
6. For IIS 7 and above:
  - a. Under the **Log File** section, click **Select Fields**.
  - b. Check the **Cookie ( cs(Cookie) )** box.
  - c. Click **OK**.
7. For IIS 6:
  - a. Click **Properties** and go to the **Advanced** tab.
  - b. Check the **Cookie ( cs(Cookie) )** box.
  - c. Click **OK**.

## Related documents

The table below lists some documents related to Exchange Reporter Plus that you may find useful.

Document	What is it about?
<a href="#">Admin guide</a>	This is an all-inclusive guide that covers all the aspects of the product and provides step-by-step instructions on how to configure and use the various settings it provides.
<a href="#">SSL configuration guide</a>	This guide provides step-by-step instruction on how to apply an SSL certificate in the product, and enable a secure connection (HTTPS) between the browser and Exchange Reporter Plus server.
<a href="#">Database maintenance guide</a>	This guide contains frequently asked questions about database maintenance in Exchange Reporter Plus.
<a href="#">[E-book] Securing Exchange with Exchange Reporter Plus</a>	This e-book lists the best practices for securing your Exchange environment.
<a href="#">Reverse proxy guide</a>	This guide provides step-by-step instructions on how to enable a reverse proxy for Exchange Reporter Plus.

### About Exchange Reporter Plus

Exchange Reporter Plus is a reporting, change auditing, monitoring, and content search tool for hybrid Exchange and Skype for Business. It features over 450 comprehensive reports on various Exchange objects such as mailboxes, public folders, and distribution lists, and also on Outlook Web Access and ActiveSync. Configure alerts in Exchange Reporter Plus for instant notifications on critical changes that require your immediate attention.

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