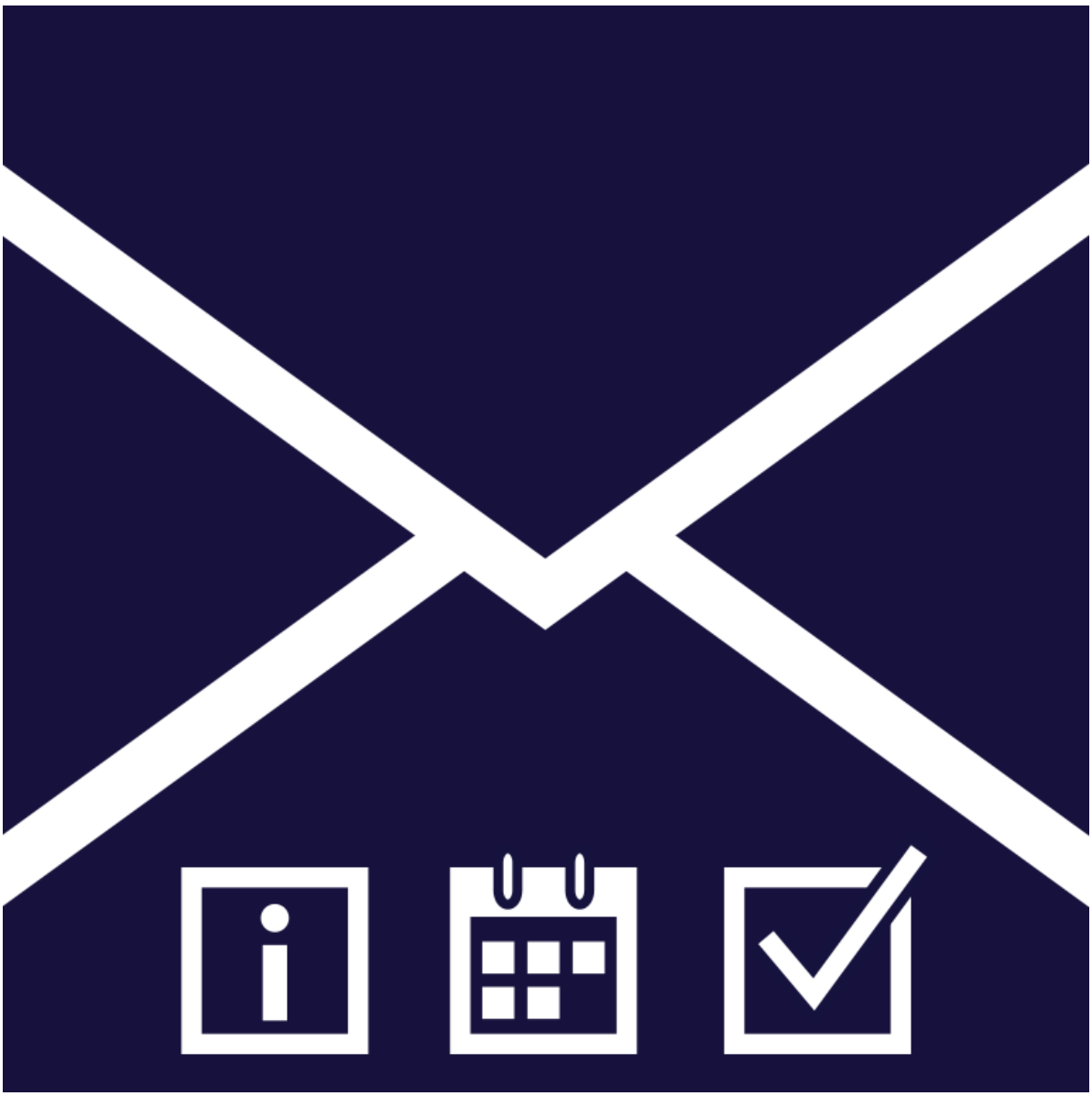
VERSION 8

GAGETRAK EMAIL CONFIGURATION

Intro Guide



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M-F 6:00 a.m. to 4:00 p.m., MST.
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TABLE OF CONTENTS

Chapter 1: Email Settings 4

Notice of Privacy and Data Usage 4
Enabling Email Automation 4
- SMTP 5
- Modern Authentication Options - Email API 6
  - Microsoft Graph with Application-level Permissions 7
    - Before You Start 7
    - Risks When Using Microsoft Graph Mail.send Permissions 7
    - Configuration 7
  - Microsoft Graph with Delegated Permissions 12
    - Before You Start 12
    - Configuration 12

Chapter 2: GAGEtrak Email Server Configuration 18

Before You Start 18
Selecting a Database 18
Email Settings Overview 19
- Send Email from Client 19

Choosing an Email Type 19
- Microsoft Graph Configuration 20

Modern Authentication Settings 20
- Configuration Checklist 21

SMTP Email Configuration 21
Testing and Saving Email Settings 22
- Send a Test Email 22
  - If a Test Email Is Not Received 22

Managing Email Settings by Database 23
- Existing Settings 23
- New or Updated Settings 23
- Multiple Database Connections 23
- Related Configuration Instructions 23

Training 24

Contact Us 24

CHAPTER 1: EMAIL SETTINGS

GAGEtrak can be configured to automatically send scheduled email to recipients on topics such as calibration due listings or inactive gages.

Notice of Privacy and Data Usage

This application uses the Microsoft Graph API for Authentication and Email Dispatch. When Modern Authentication options are selected [Application or Delegated] for sending email from GAGEtrak, the following personal information and data will be utilized:

What we access: Your name, email address, and the content of messages you compose within this app.

How we use it: We use your identity to secure your account and the "Send" permission solely to deliver emails you trigger.

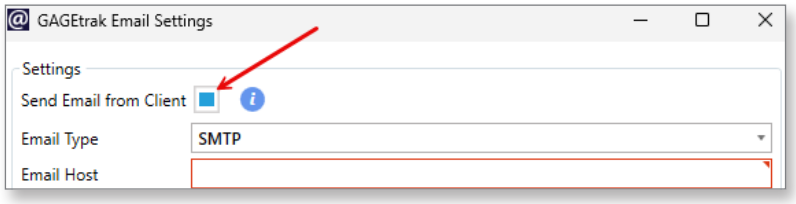
Storage: We do not read or store your inbox messages. Outbound email content is processed in real-time and transmitted directly to your mail provider.

Please view our corporate website for more information on CyberMetrics Privacy Policies on Personal Information and Data Usage.

Enabling Email Automation

In GAGEtrak, click the caliper icon in the upper left-hand corner of the program window to access the Backstage Menu and then click the **@** icon under the **Email Settings** option.

In the **GAGEtrak Email Settings** dialog, click the **Send Email From Client** checkbox to activate email automation.

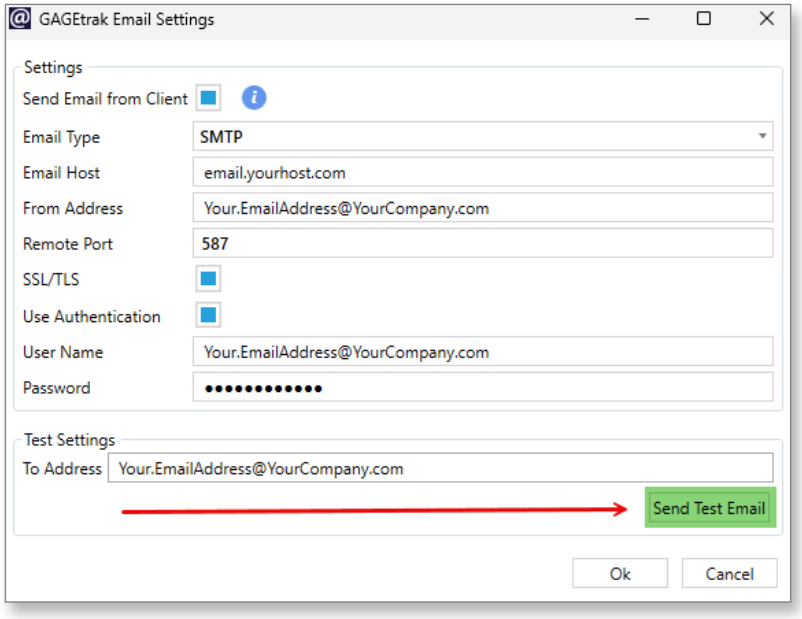


Note: Select **Send Email From Client** only when the GAGEtrak client is responsible for scheduled email notifications. When using **GAGEtrak Email Server** for scheduled notifications, clear this checkbox to prevent duplicate emails. For additional information, refer to Chapter 2: GAGEtrak Email Server Configuration.

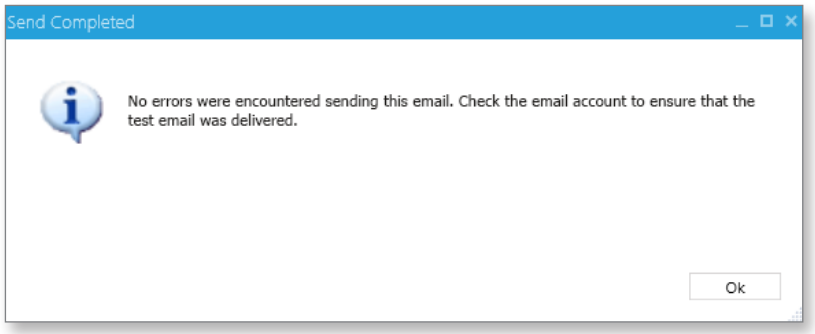
Choose the **Email Type** utilized for email within your organization (SMTP or M365/Azure Modern Authentication).

SMTP

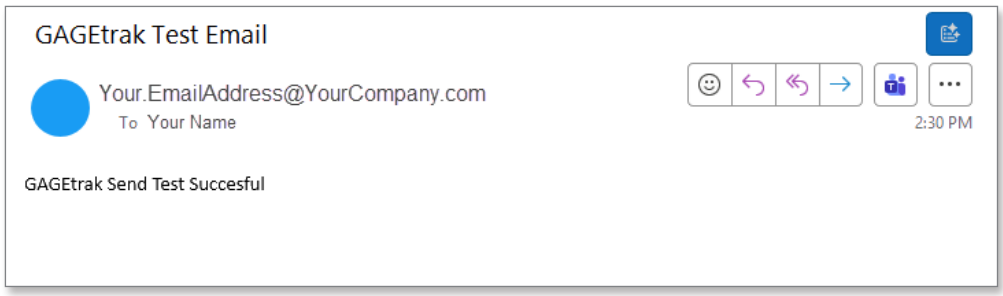
For SMTP, provide the **Email Host**, **From Email** and **Remote Port** information as applicable.



Enter either your own email address (or another email address with which you can verify success) and then click the **Send Test Email** button. If the test send was successful with the information provided, you should see the following message dialog:

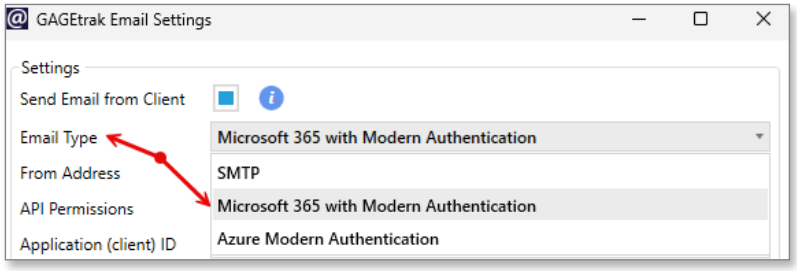


A successful **GAGEtrak Test Email** will appear in the test user's inbox:

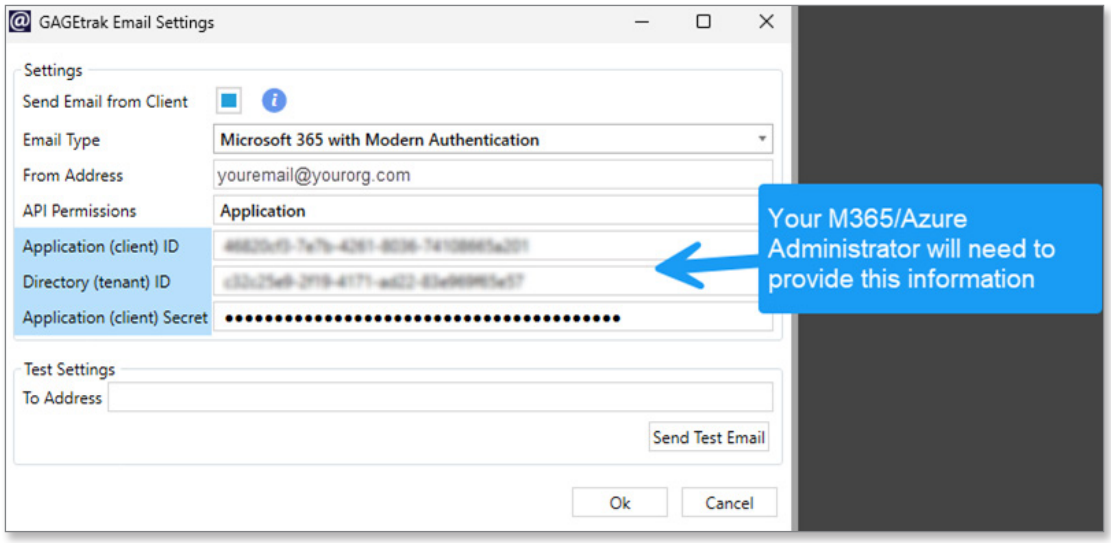


Modern Authentication Options - Email API

GAGEtrak provides email settings that support Modern Authentication (Modern Auth) methods. Modern Authentication in Microsoft 365/Azure is a secure, token-based identity management framework that enables advanced security features, replacing outdated username/password "basic" authentication. GAGEtrak utilizes the Microsoft Graph API to facilitate secure authentication and email from the application. If your organization uses Azure or Microsoft 365 for managing email, then you can select the appropriate **Email Type** within **Email Settings**.



You will need to work with your Azure/M365 administration team to properly configure GAGEtrak to send email using either of the Modern Auth Email Types provided. They will need to provide the Application (client) ID, Directory (tenant) ID and Application (client) Secret from your organization's Microsoft 365/Azure account.



For Microsoft 365 / Entra Administrators: The following sections provide the application registration and API permission configuration procedures for Microsoft Graph using Application-level or Delegated permissions.

Microsoft Graph with Application-level Permissions

The following instructions are intended for your organization's Microsoft 365 or Microsoft Entra administrator. They describe the application registration and permissions required to enable GAGEtrak email delivery using Microsoft Graph.

Once the administrator has completed these steps, the required configuration information can be provided to the GAGEtrak administrator.

Before You Start

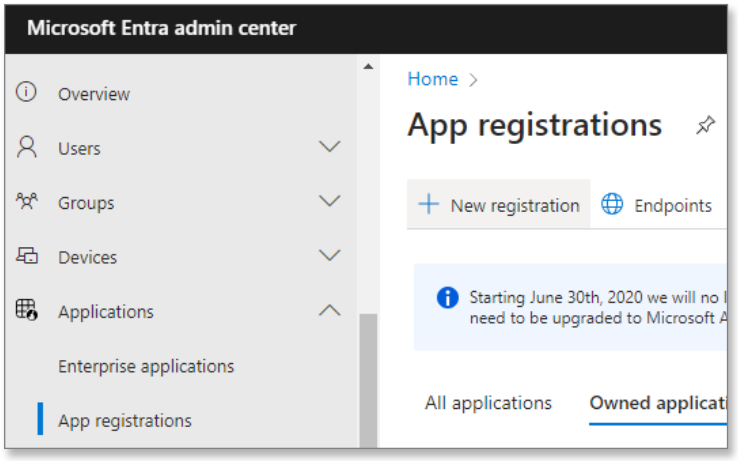
- You must be a Global Administrator for your company's Microsoft 365 tenant / Microsoft Entra (Formerly Azure AD) directory or have at least sufficient privileges to register a new application in Azure Active Directory.
- If you have already registered or created an app registration in Microsoft Entra for your GAGEtrak application, please use the previously registered application to modify or add any required configurations as needed.

Risks When Using Microsoft Graph Mail.send Permissions

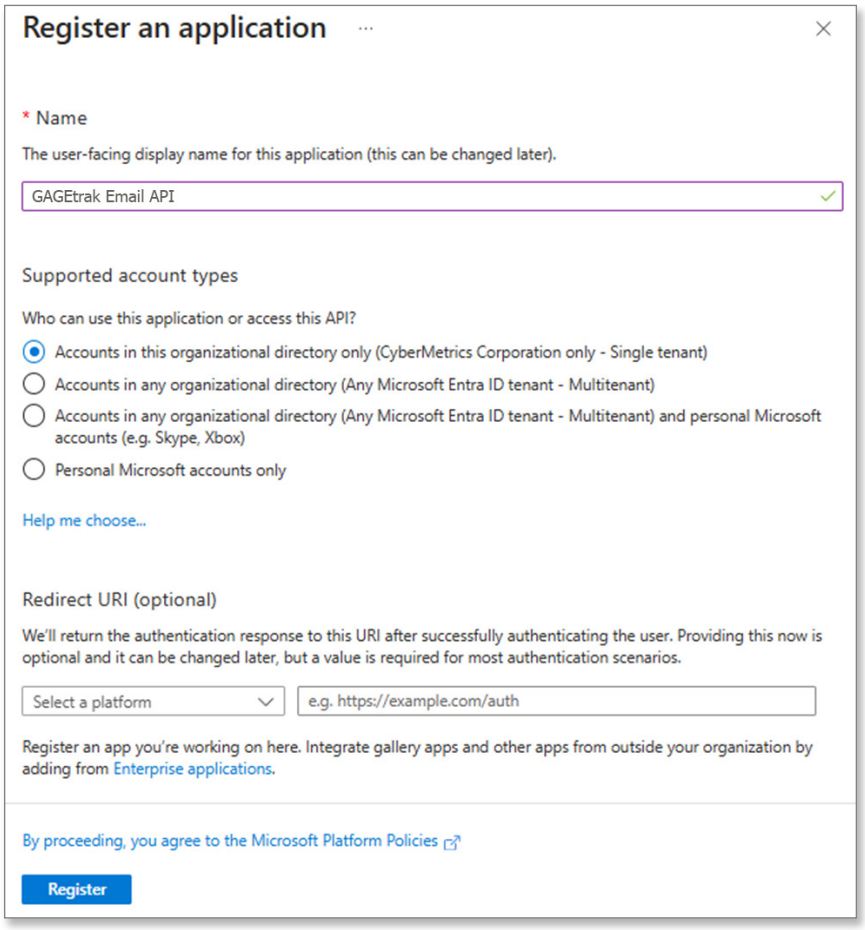
There are many good reasons why you may not want to configure application-level Mail.Send permissions, but the most important reason would be that this permission can be used to send emails as any user from your organization. We suggest you review any risks associated with using Microsoft Graph with application-level permissions and ensure application-level permissions is the correct choice for your organization.

Configuration

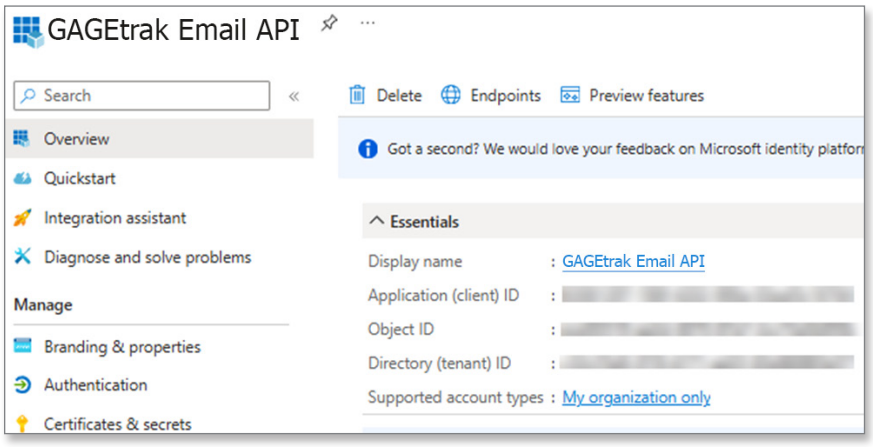
1. Log into https://entra.microsoft.com.
2. On the left-hand panel, click **Applications -> App Registrations**.
3. Click **New registration**.



4. Name the application *GAGEtrak Email API* and click **Register**.

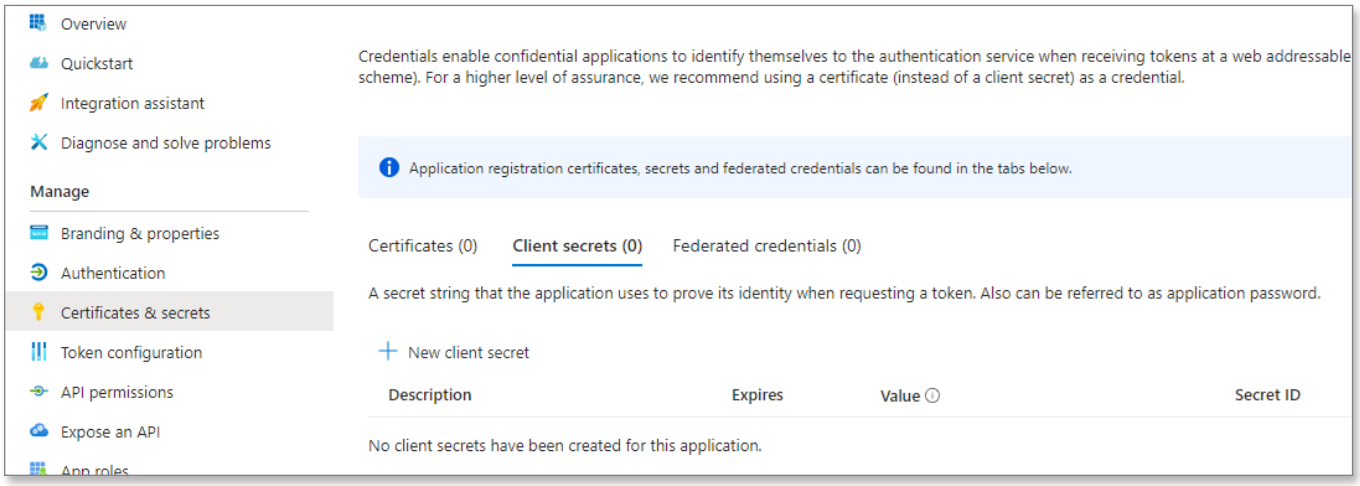


5. You will be automatically redirected to the new application settings page. (If not, click **Overview** on the left-hand panel.) Under the **Essentials** section, copy and paste the following into a notepad:
   a. Application (client) ID
   b. Directory (tenant) ID

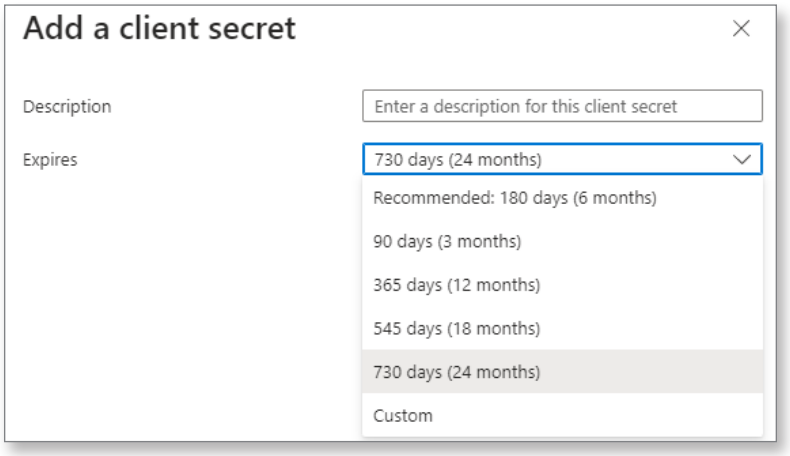


6. On the left, click **Certificates & secrets -> Client secrets**.

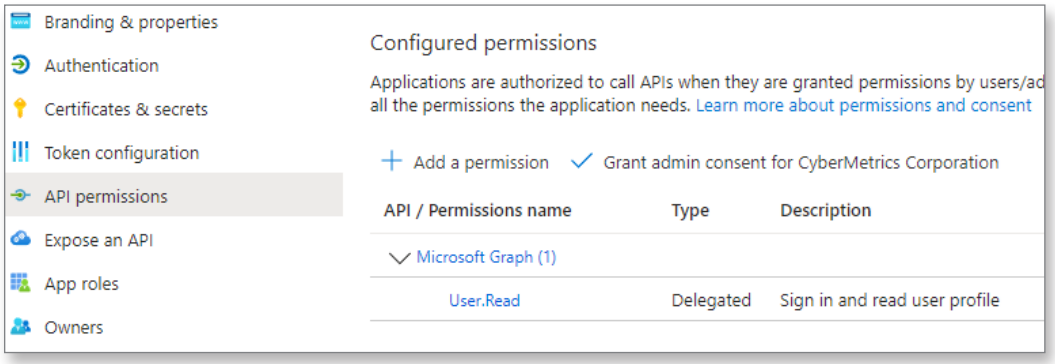
7. Click **New client secret**.



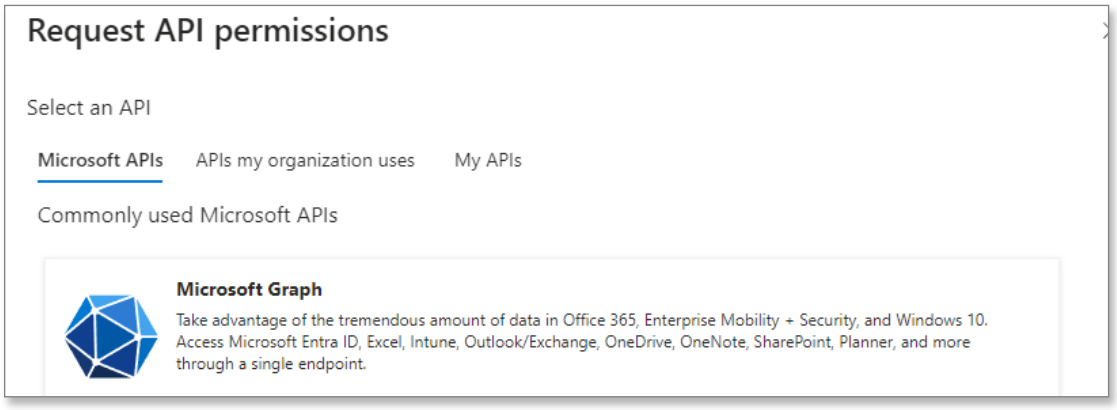
8. Specify a **Description** and set the expiration date to 24 months or your desired duration.



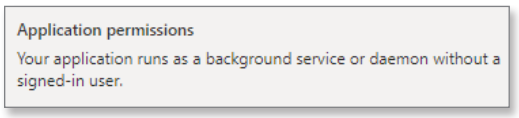
9. Copy the secret to the notepad file **BEFORE** refreshing the page. Once the page is refreshed, the secret cannot be copied any longer.
10. From the left, select **API permissions**.
11. Click **Add a permission**.



12. Click **Microsoft Graph**.



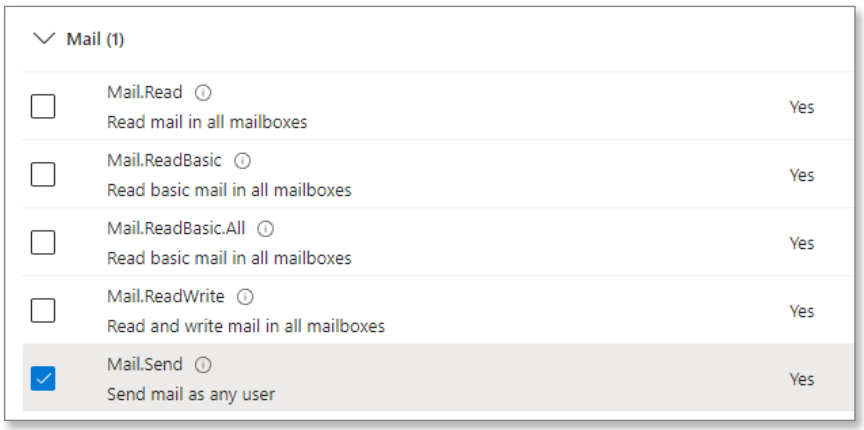
13. Click **Application permissions**.

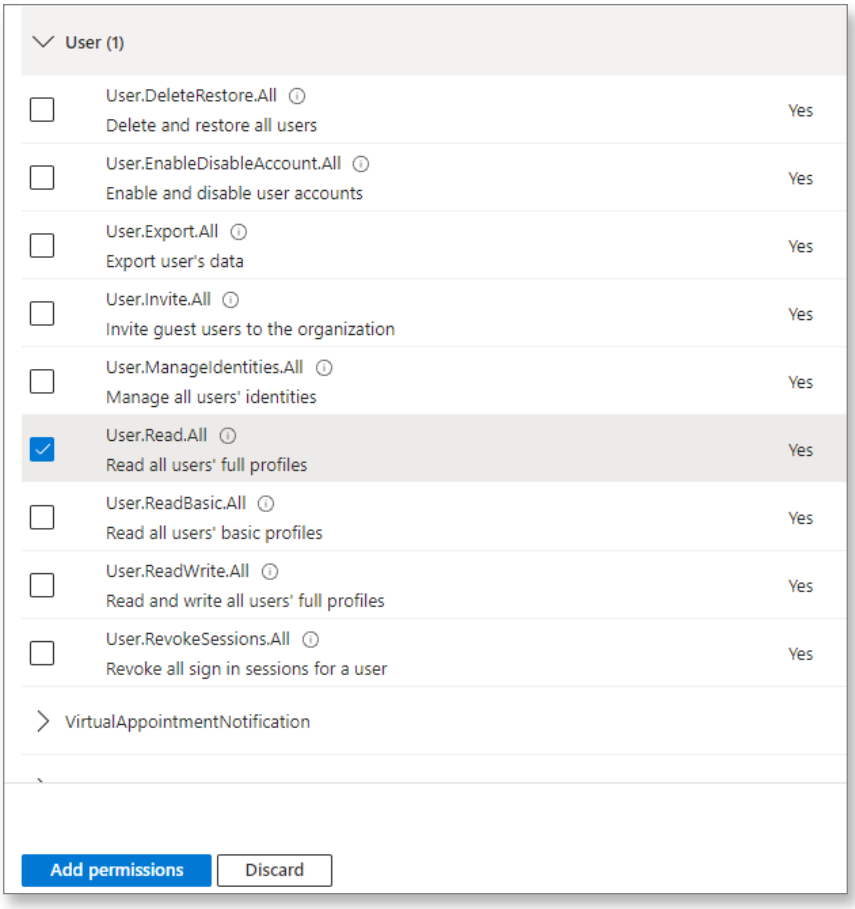


14. Scroll down the permissions list and select the following permissions from the sections outlined below. Once added, click **Add permissions**.

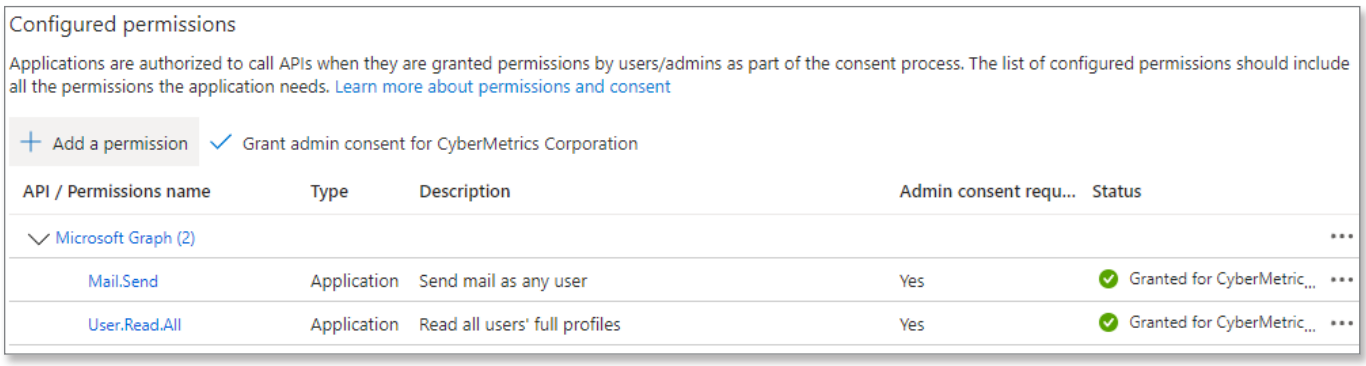
    Mail
    - Mail.Send

    User
    - User.Read.All





15. Click the **Grant admin consent for <Company name>** button and **Yes** to the confirmation message. Verify that the **Type** column is showing **Application** permissions.



Microsoft Graph with Delegated Permissions

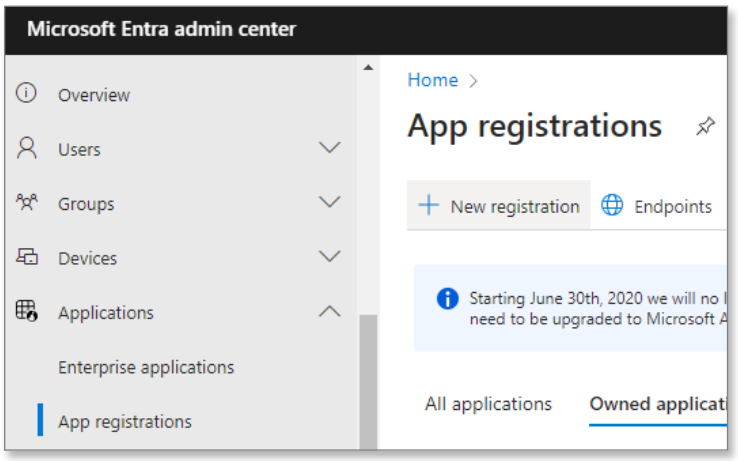
The following instructions describe the application registration and permissions required to configure Microsoft Graph with Delegated permissions. Delegated permissions allow GAGEtrak to send email as one specific authorized user. If you need the ability to send email as any user, please see our article on configuring Email API with application-level permissions.

Before You Start

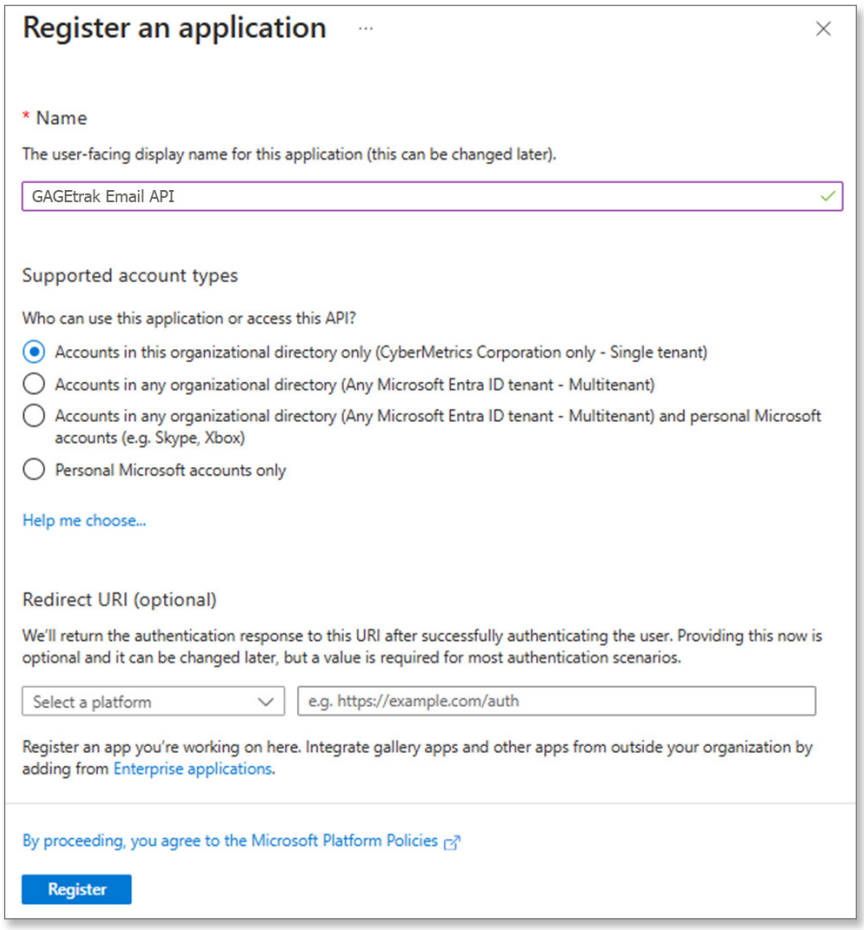
- You are a Global Administrator for your company's Microsoft 365 tenant / Microsoft Entra (Formerly Azure AD) directory or have at least sufficient privileges to register a new application in Azure Active Directory.
- If you already have a registered application, please use the already registered application and modify or add the required configuration as needed.

Configuration

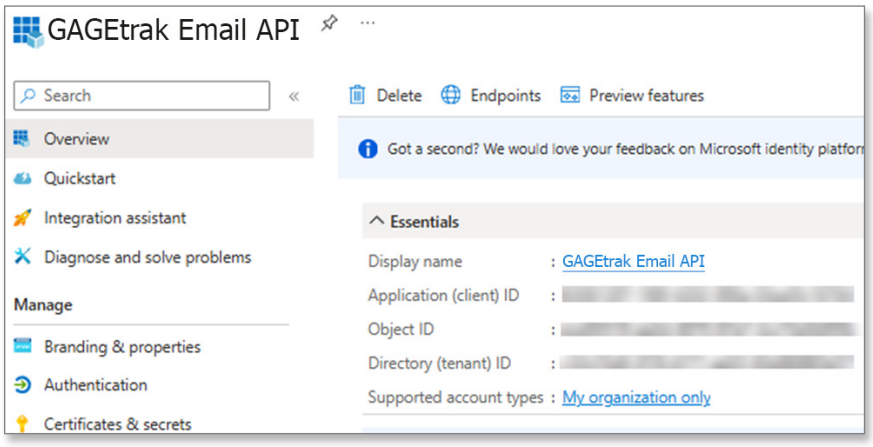
1. Log into https://entra.microsoft.com.
2. On the left-hand panel, click **Applications -> App registrations**.
3. Click **New registration**.



4. Name the application *GAGEtrak Email API* and click **Register**.

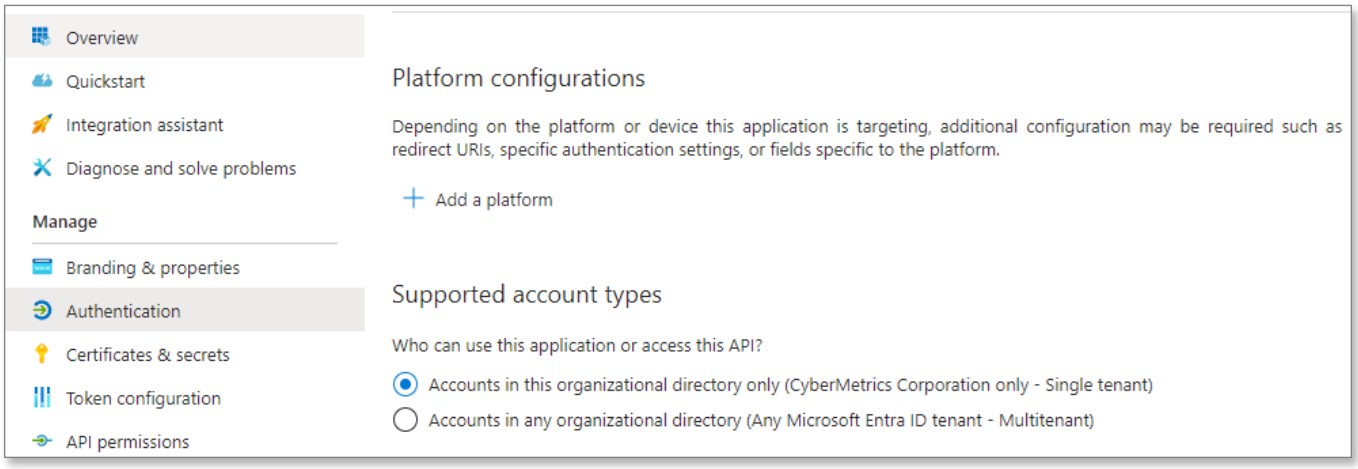


5. You will be automatically redirected to the new application settings page. (If not, click **Overview** on the left-hand panel.) Under the **Essentials** section, copy and paste the following into a notepad:
   a. Application (client) ID
   b. Directory (tenant) ID

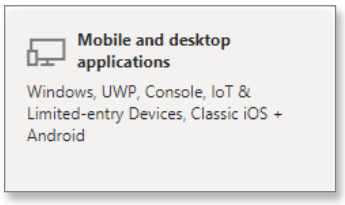


6. On left side, click **Authentication**.

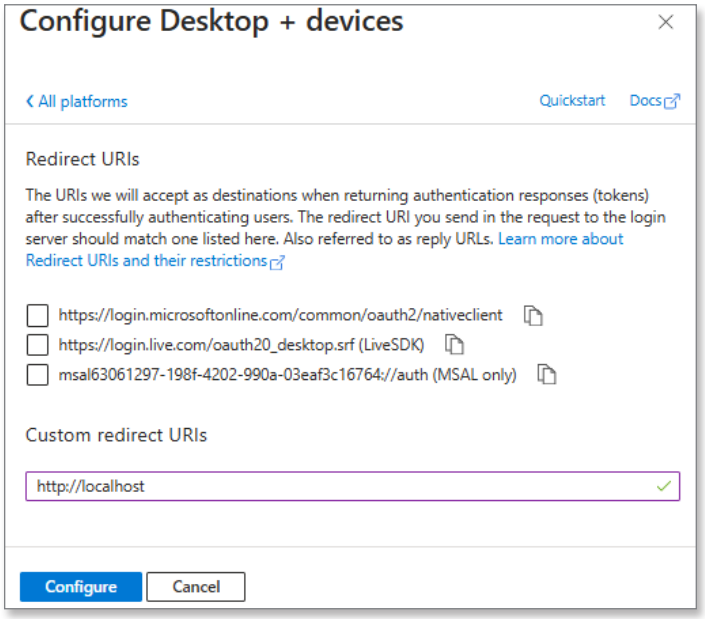
7. Click **Add a platform** under **Platform configurations**.



8. Select **Mobile and desktop applications**.

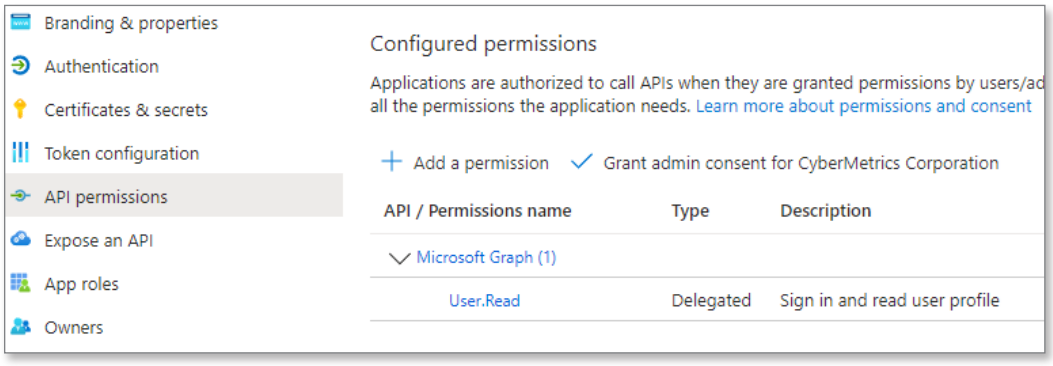


9. Add the URI *http://localhost* in **Custom redirect URIs** and click **Configure**.

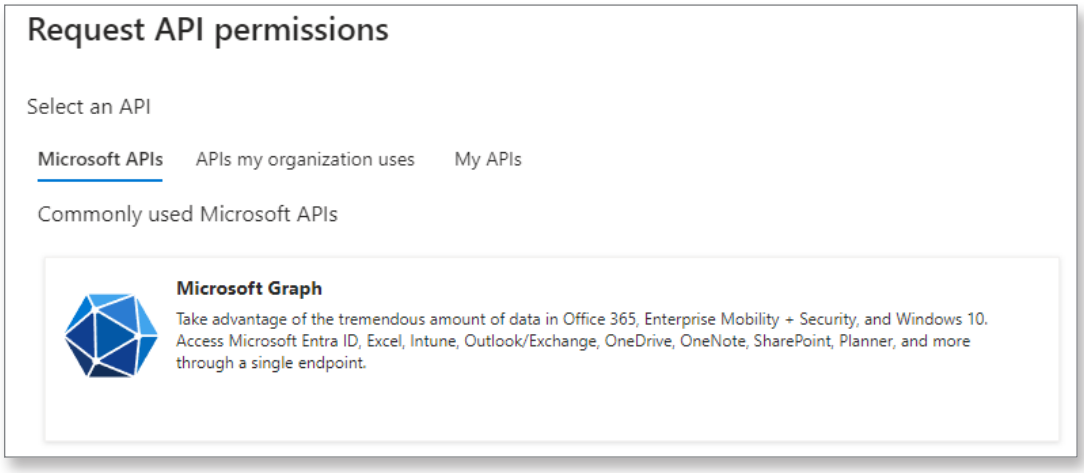


10. From the left menu, select **API permissions**.

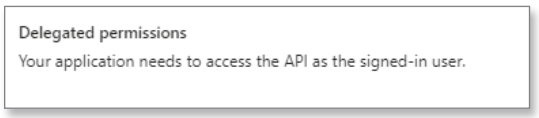
11. Click **Add a permission**.



12. Click **Microsoft Graph**.



13. Click **Delegated permissions**.



14. Scroll down the permissions list and select the following permissions from the sections outlined below. Once added, click **Add permissions**.

Openid permissions

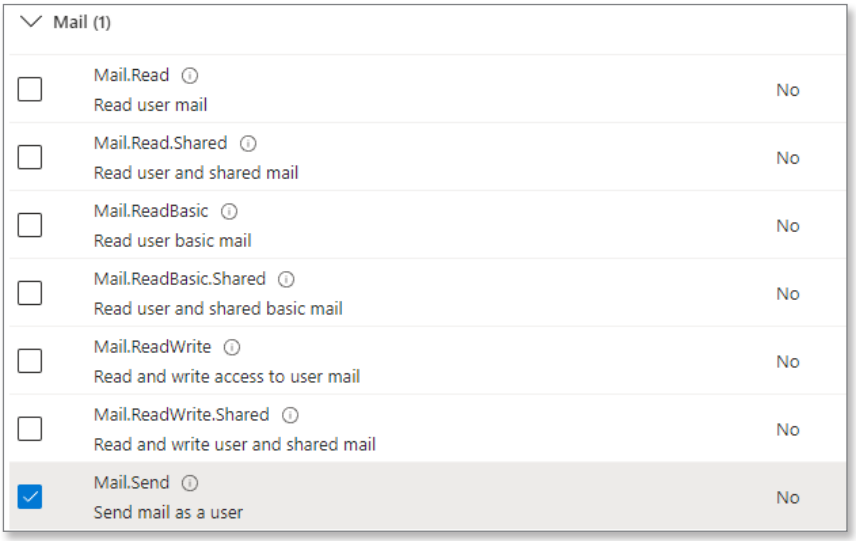
- email
- offline_access
- openid
- profile

Mail

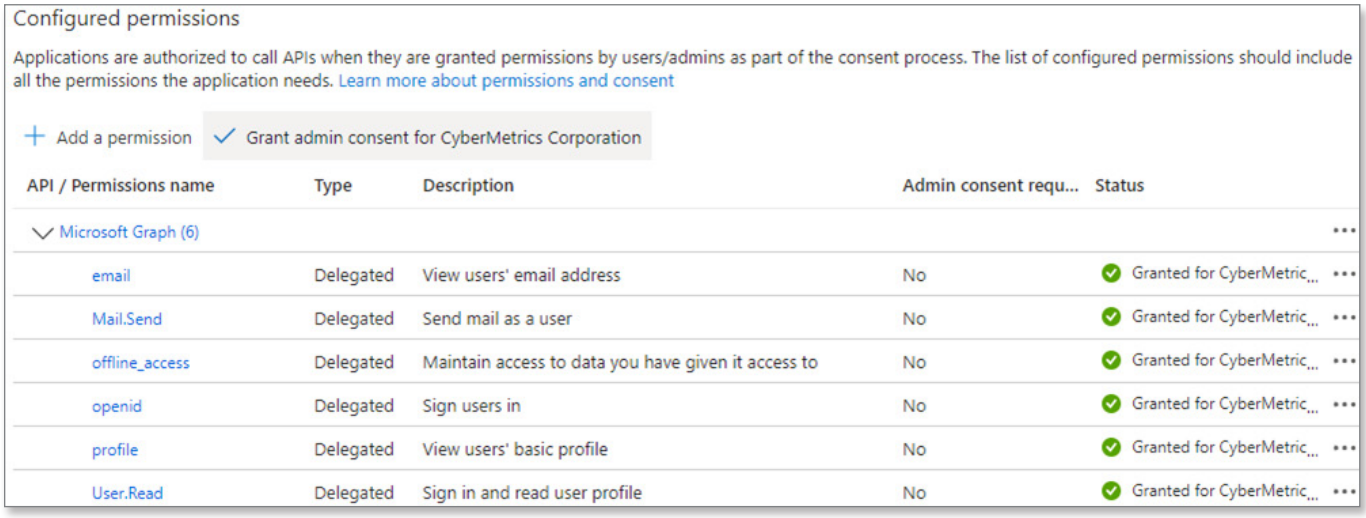
- Mail.Send

User

- User.Read (Should be included by default when app is registered)



15. Click the **Grant admin consent for <Company name>** button and **Yes** to the confirmation message. Verify that the **Type** column is showing **Delegated** permissions.



CHAPTER 2: GAGETRAK EMAIL SERVER CONFIGURATION

GAGEtrak Email Server provides a browser-based interface for reviewing and maintaining the email settings stored in each connected GAGEtrak 8 database.

If a database already contains email settings configured through the GAGEtrak client, those settings appear in the Email Server. Administrators can review or modify them without opening the client. If no settings exist, they can be created here and saved to the connected database.

Before You Start

Complete the installation of GAGEtrak Email Server, activate its license, and configure the applicable database connections. Have the sender address and the SMTP or Microsoft authentication information supplied by your organization available.

Important: The Email Server does not maintain a competing set of email settings. It reads and updates the email configuration stored in each connected GAGEtrak database.

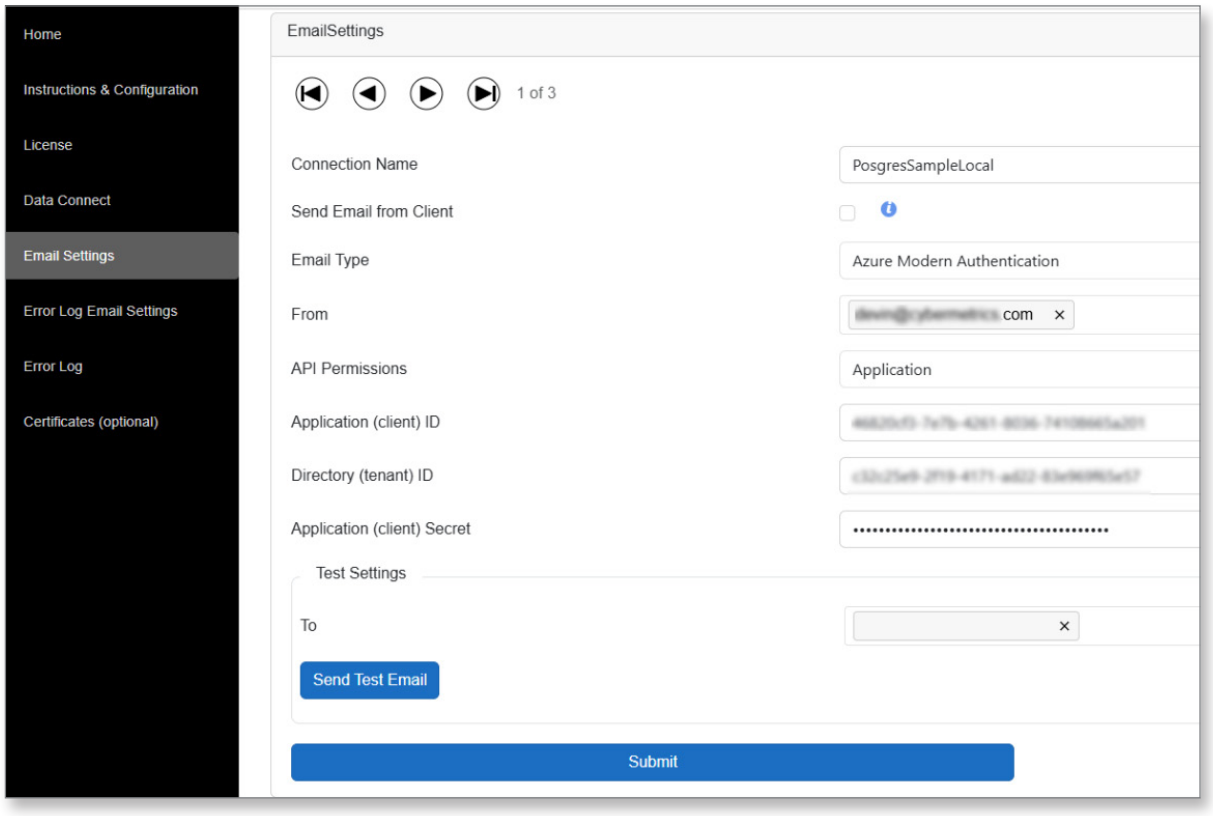
Selecting a Database

1. Select **Email Settings** from the left navigation menu.
2. Use the record navigation buttons to locate the desired database. Verify its **Connection Name**.
3. Review any existing settings or select the required **Email Type** to configure new settings.

The following pages describe the email options and testing workflow. For initial Microsoft application registration, refer to the Application-level and Delegated permission instructions earlier in this guide.

Email Settings Overview

The **Email Settings** screen displays the selected database connection and the corresponding email configuration. Use the navigation buttons to move between connected databases.



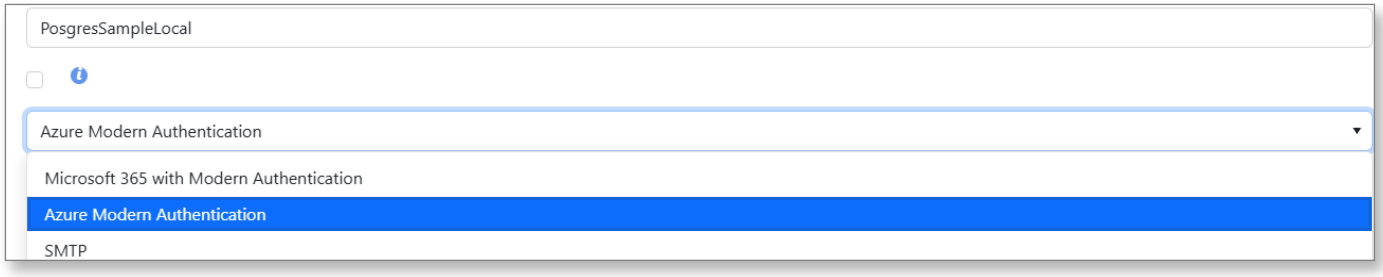
Send Email from Client

Clear the **Send Email from Client** checkbox when GAGEtrak Email Server is responsible for sending scheduled notifications. This prevents the GAGEtrak client from independently sending those notifications.

Note: Verify the configuration and send a successful test email for each connected database before relying on the Email Server for scheduled delivery.

Choosing an Email Type

Select the email delivery method used by your organization from the **Email Type** list.



Microsoft 365 with Modern Authentication and **Azure Modern Authentication** both use the Microsoft Graph API and the same Email Server configuration fields. The separate choices align with the Microsoft administration interfaces described earlier in this guide.

SMTP uses an email host, port, and any required transport security and login credentials.

Microsoft Graph Configuration

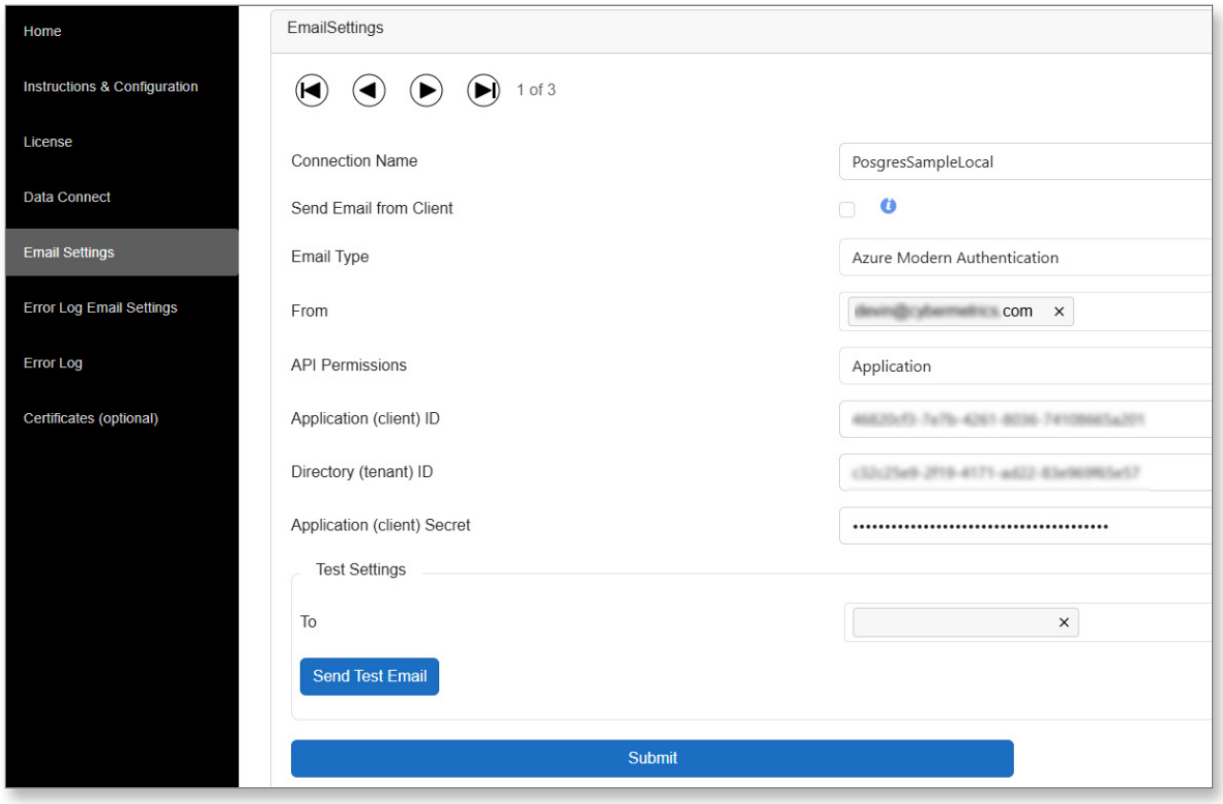
For either Modern Authentication option, enter the sender address in **From**, choose **Application** or **Delegated** under **API Permissions**, and enter the **Application (client) ID** and **Directory (tenant) ID**.

When **Application** permissions are selected, also enter the **Application (client) Secret**. The **Client Secret** field is not displayed for **Delegated** permissions.

Your Microsoft administrator should complete the required registration, permissions, and authorization procedures described in the earlier sections of this guide.

Modern Authentication Settings

The following example shows an Email Server connection configured for Azure Modern Authentication with Application permissions.



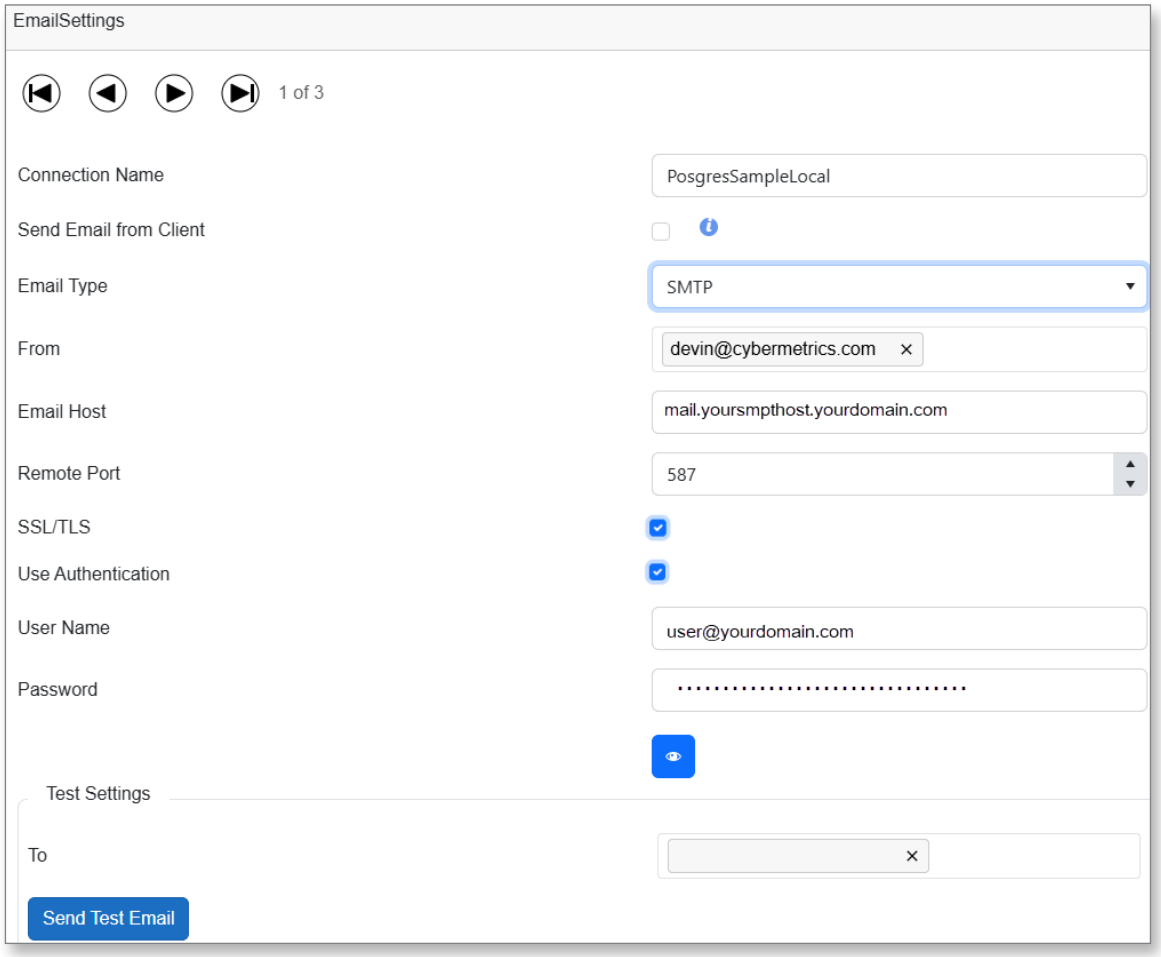
Configuration Checklist

1. Select **Microsoft 365 with Modern Authentication** or **Azure Modern Authentication**.
2. Enter the sender address in **From**.
3. Choose **Application** or **Delegated** under **API Permissions**.
4. Enter the application and directory identifiers. For Application permissions, also enter the client secret.
5. Enter a recipient address in the **To** field under **Test Settings** and click **Send Test Email**.

Refer to the preceding Microsoft Graph instructions for application registration and the required permission configuration.

SMTP Email Configuration

If your organization uses an SMTP email server, select **SMTP** from the **Email Type** list and complete the fields shown below.



1. Enter the sender email address in **From**.
2. Enter the server address in **Email Host** and its **Remote Port**.

3. Select **SSL/TLS** and **Use Authentication** as required by your email provider.
4. When authentication is required, enter the **User Name** and **Password**.

Use the connection and security settings supplied by your organization or email provider.

Testing and Saving Email Settings

Test email delivery for every connected GAGEtrak database that will send scheduled notifications through the Email Server.

Send a Test Email

1. Verify the correct database is displayed in **Connection Name**.
2. Review the selected email type, sender address, and required authentication or SMTP information.
3. Under **Test Settings**, enter a recipient email address in **To**.
4. Click **Send Test Email**. A **Send Completed** dialog indicates no sending error was detected.
5. Click **OK** and then verify the test message was received at the specified address.
6. After confirming that the test email was received, click **Submit** to save the email settings for the selected database.

Important: A successful database connection test does not verify email delivery. Test email delivery separately for each connected database.

If a Test Email Is Not Received

Review the sender and recipient addresses, SMTP host and port settings, or Microsoft Graph application registration and permissions. Check reported errors and consult your email administrator. Correct the configuration and repeat the test before using scheduled notifications.

Managing Email Settings by Database

Each connected GAGEtrak database stores its own email settings. The Email Server displays those settings when you select the corresponding connection.

Existing Settings

If email settings are already configured and functioning in the GAGEtrak client, they will appear in the Email Server. You do not need to create a second configuration. Review the settings, clear **Send Email from Client** for Email Server processing, and verify email delivery.

New or Updated Settings

If no email settings exist, or changes are needed, configure the settings through the Email Server interface and save them to the selected GAGEtrak database.

Multiple Database Connections

Use the record navigation buttons to review each connection individually. Confirm the selected database before changing settings, and repeat email testing for every database that will send notifications.

Related Configuration Instructions

For SMTP and Microsoft Graph application registration details, consult Chapter 1 of this guide, including the sections for **Microsoft Graph with Application-level Permissions** and **Microsoft Graph with Delegated Permissions**.

For Email Server installation, licensing, database connection setup, error notifications, and certificate management, refer to the separate GAGEtrak Email Server Intro Guide.

TRAINING

To save time, avoid common mistakes and get the most out of your software, it is imperative to receive proper training and we offer a wide variety of training options to meet every need and budget.

Completion of comprehensive training entitles each participant to a completion certificate in order to provide proof to an auditor that you've received proper training from the software manufacturer.

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