



Creating a Custom Report in Notes Migrator for Sharepoint

Using Notes Migrator for SharePoint

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Introduction

I am providing details on how to create a custom report on Notes Migrator for SharePoint. I will show what software needs to be installed and how I start to create a report. I believe that readers will find it easy to create reports if they have similar experience with Microsoft Access and / or Microsoft SQL. As always, I try to show the key steps and configurations along the way. I will also include links to custom reports that I recently created.

Installing the Report Viewer

This section was revised in September, 2014.

Download the **Microsoft Report Viewer Redistributable 2008** if you want to review a report in the **Notes Migrator for SharePoint** console. You can click the link below:

<http://www.microsoft.com/en-us/download/details.aspx?id=577>

You must install the **.NET Framework Redistributable Package version 3.5** (or later version) prior to installing the **Microsoft Report Viewer Redistributable 2008**.

Notes Migrator for SharePoint 6.4 or earlier does not support later versions of **Microsoft Report Viewer**.

Revision

You must install the **.NET Framework Redistributable Package version 3.5** (or later version).

You need to install the **Microsoft® System CLR Types for Microsoft® SQL Server® 2012**

Package	Filename	URL
X86 Package	SQLSysClrTypes.msi	http://go.microsoft.com/fwlink/?LinkID=239643&clcid=0x409
X64 Package	SQLSysClrTypes.msi	http://go.microsoft.com/fwlink/?LinkID=239644&clcid=0x409

And then install the **Report Viewer 2012 runtime package**

<http://www.microsoft.com/en-us/download/details.aspx?id=35747>

Installing Visual Studio 2008

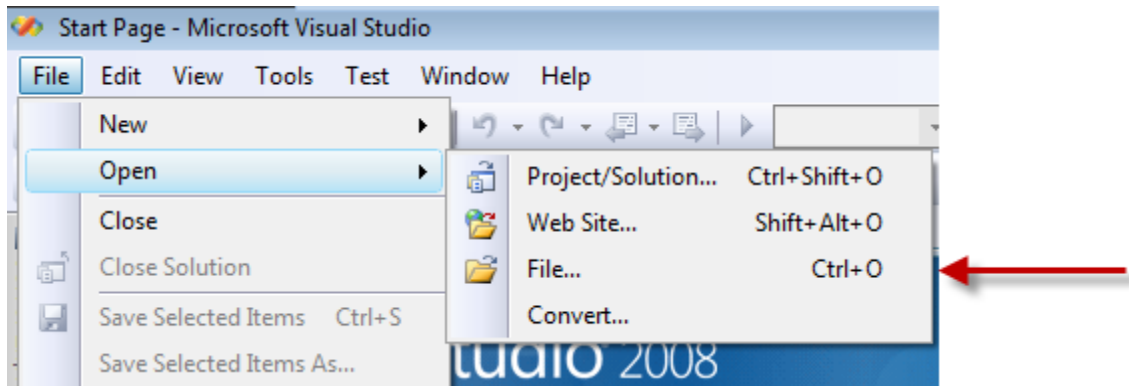
Install **Microsoft Visual Studio 2008** in order to create a custom report for **Notes Migrator for SharePoint**. There is no other version of **Microsoft Visual Studio** that works with the Report Definition files used by **Notes Migrator for SharePoint 6.4** and earlier.

Note: **Visual Studio 2010** and **2013** only support later versions of the report definition files. Updating the current report definition files will render them inoperable for **Microsoft Report Viewer 2008**.

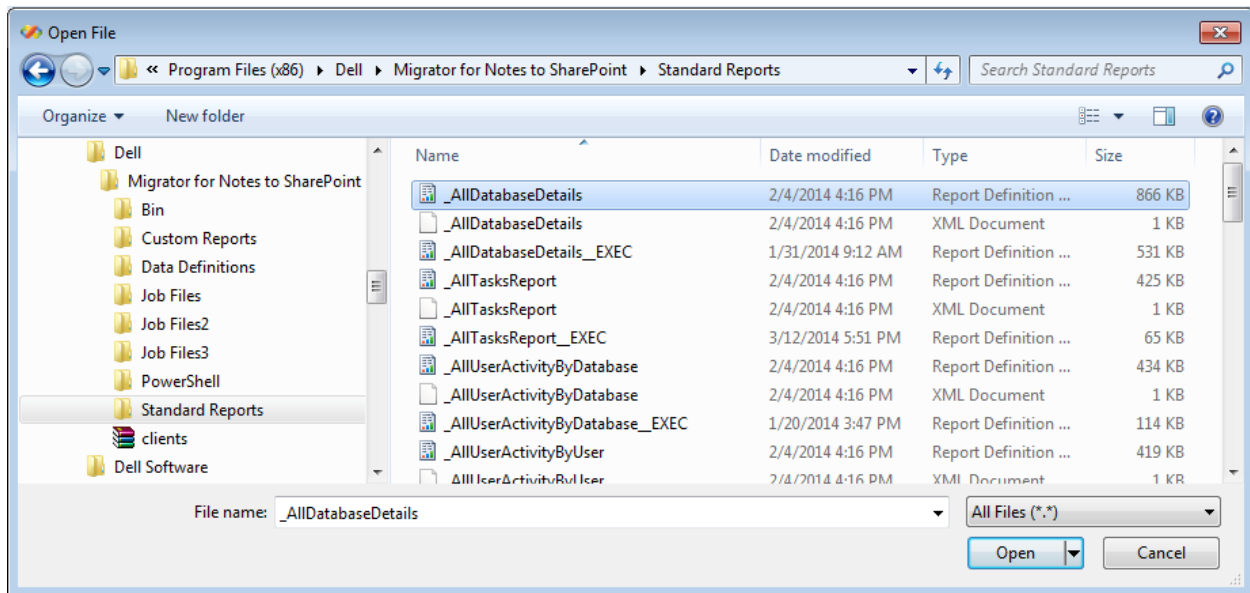
Creating a Custom Report

Start by opening an existing report within **Microsoft Visual Studio 2008**. Click on **File \ Open \ File...**



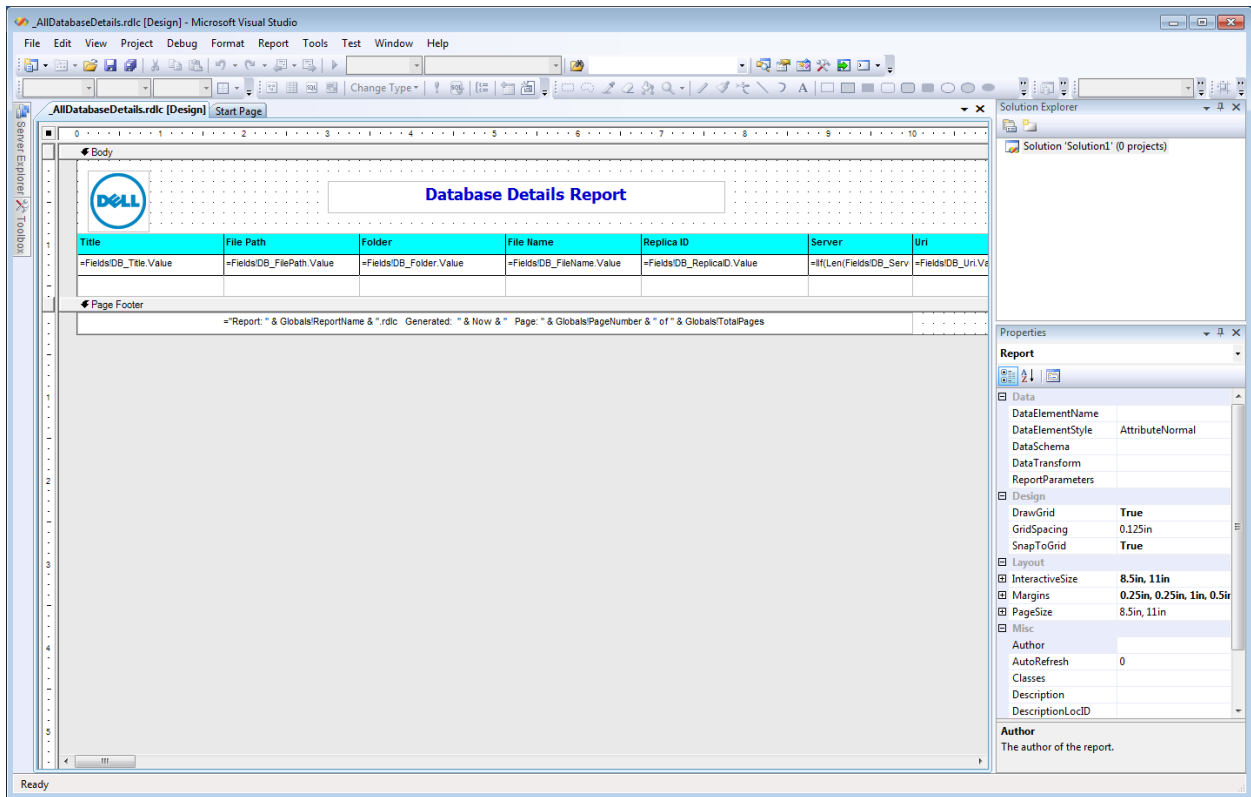


The **Open File** dialog box opens.

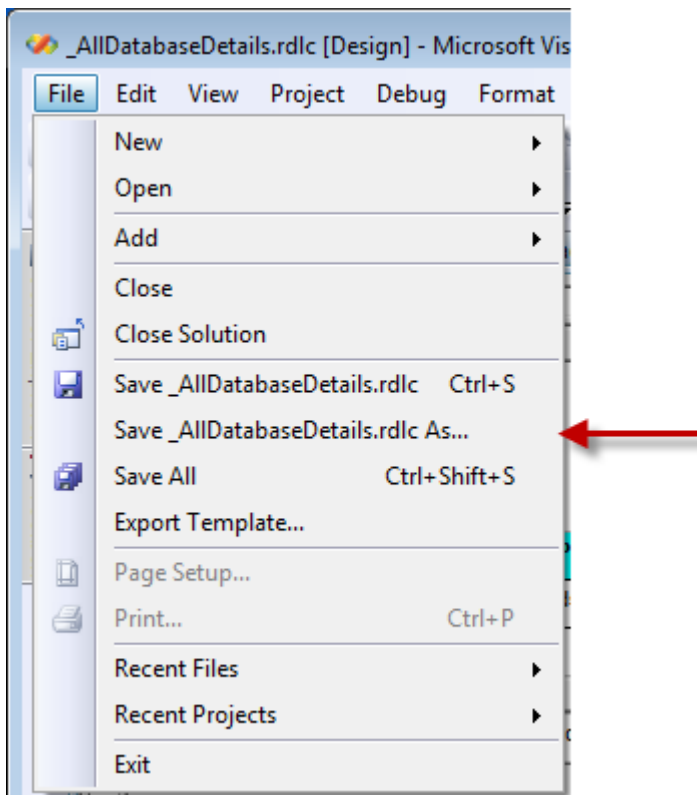


Select a report and click **Open**.

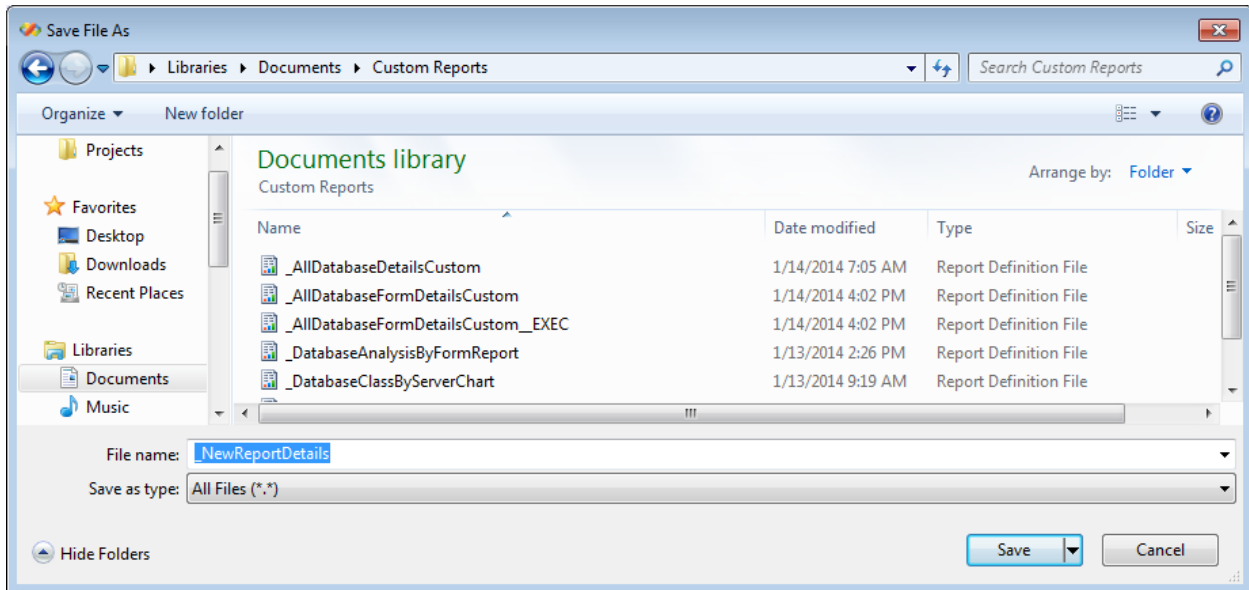
The report opens in **Microsoft Visual Studio 2008**.



Save the report.

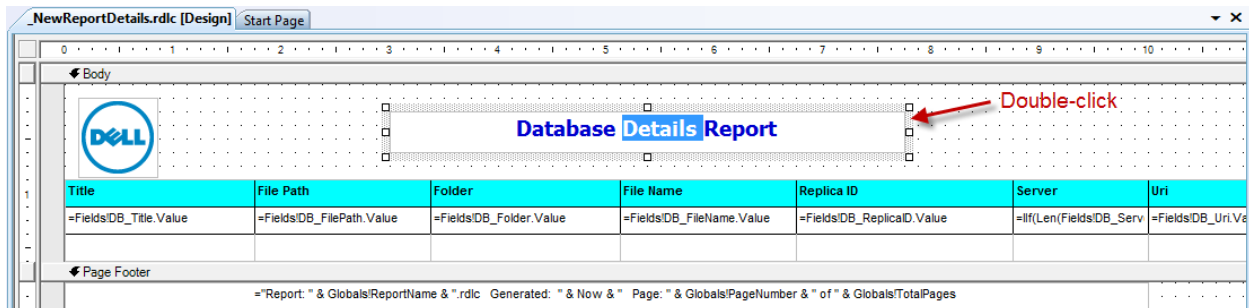


Enter a different filename and a new location (if you like).

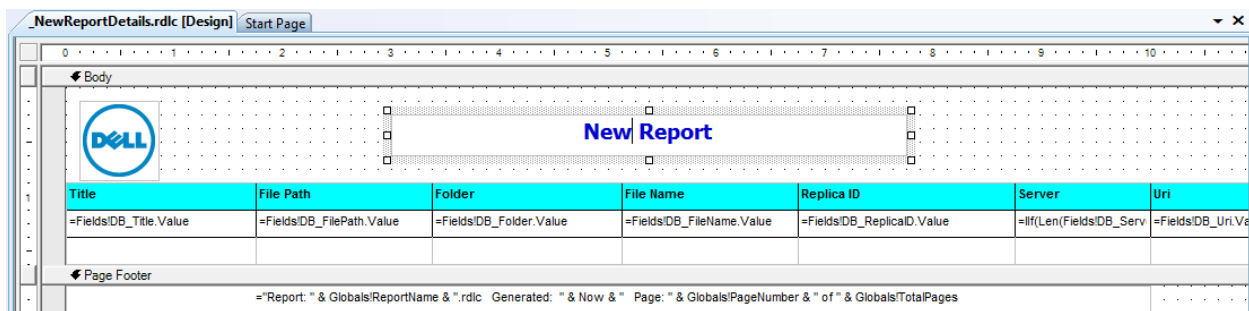


Editing the Report

Edit the title by double-clicking on it.

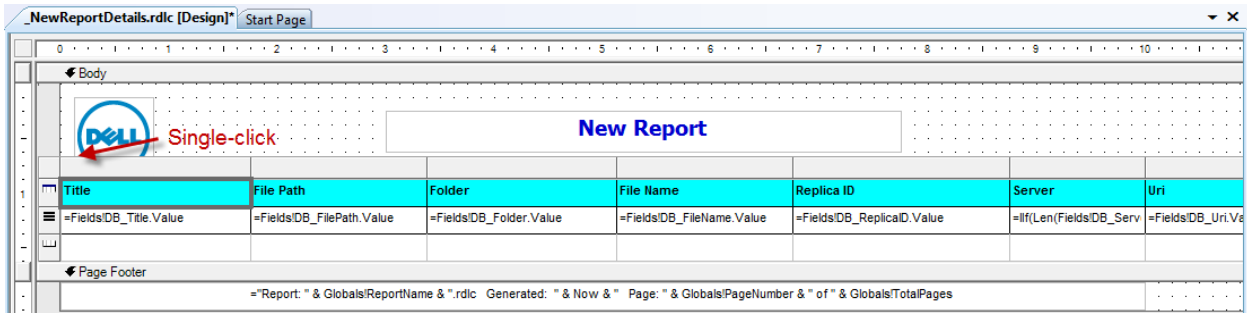


New title ...

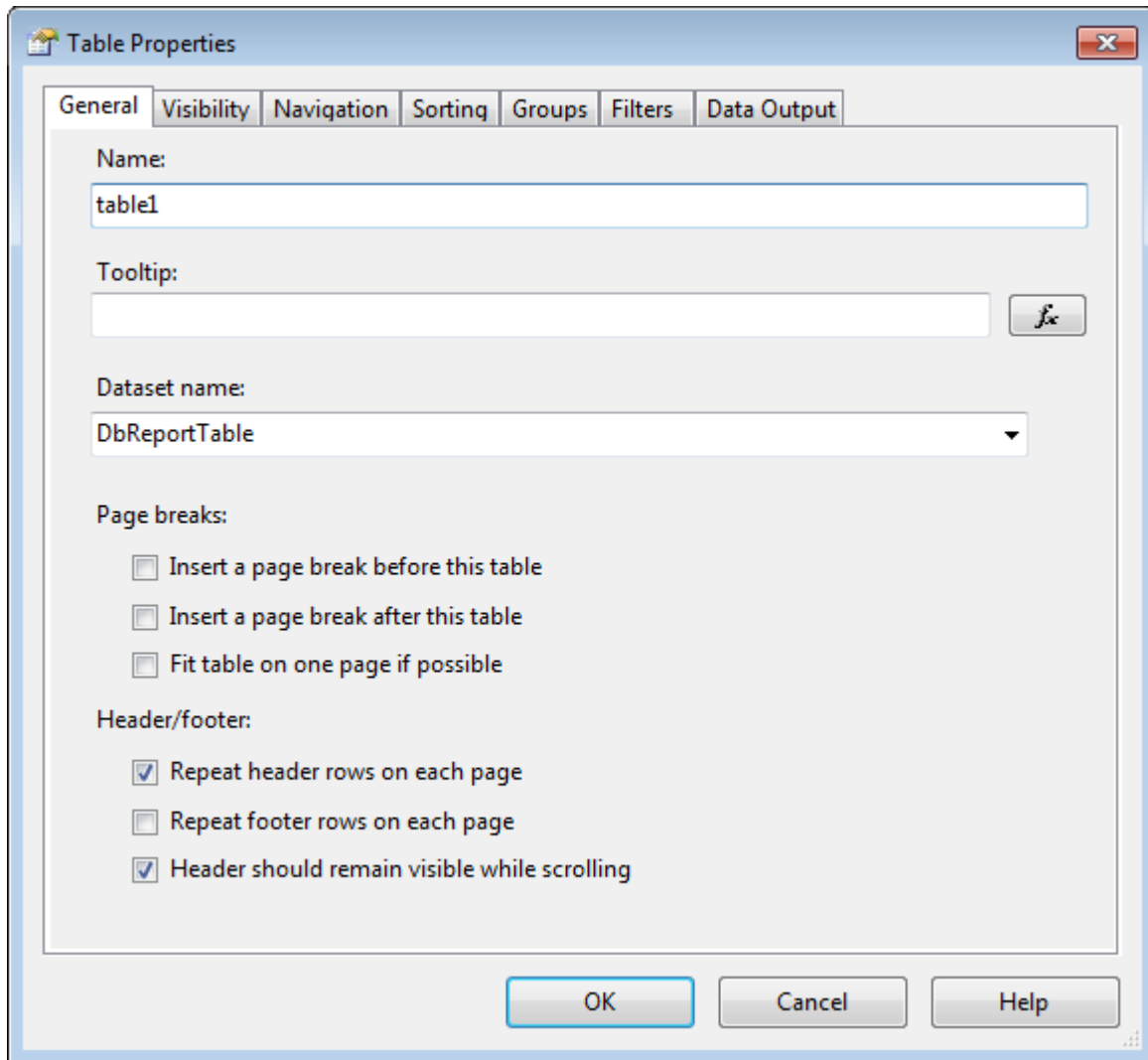


Select the data table by clicking on it.



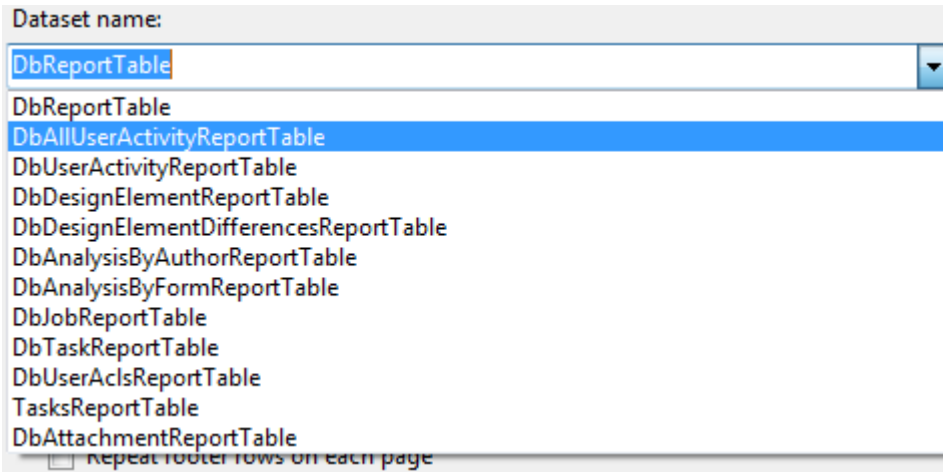


Right-click on the table and the Table Properties dialog box is displayed.



Click on the Dataset name drop down list to see the list of available data tables.





Note: There is an error in the **DbAttachmentReportTable** in **NMSP 6.3.x** and earlier releases. The error prevented all of the details from being displayed correctly in the table.

Report dataset supports the following tables:

Table	Description
DbReportTable	Defines all the reporting fields associated with a database record
DbAllUserActivityReportTable	Joins DbReportTable with user Read/Write/Use Activity information. No usernames are excluded.
DbUserActivityReportTable	Joins DbReportTable with user Read/Write/Use Activity information
DbDesignElementReportTable	Joins DbReportTable with Design scan information about Design Elements
DbDesignElementDifferencesReportTable	Joins DbReportTable with Design scan information about Design Elements compared with a Reference database
DbAnalysisByAuthorReportTable	Joins DbReportTable with detailed document Author information
DbAnalysisByFormReportTable	Joins DbReportTable with detailed document Form information
DbJobReportTable	Joins DbReportTable with Database Associated Job information
DbTaskReportTable	Joins DbReportTable with Tasks run on each Database
DbUserAclsReportTable	Joins DbReportTable with detailed database User ACL information
TasksReportTable	Provides top level Task execution details
DbAttachmentReportTable	Joins DbReportTable with file attachment scan information

You can find additional details on the tables available for reports in the **NMSP User Guide**. Search on **Standard Reports**.



Dataset name:

DbReportTable

DbReportTable
 DbAllUserActivityReportTable
 DbUserActivityReportTable
 DbDesignElementReportTable
 DbDesignElementDifferencesReportTable
 DbAnalysisByAuthorReportTable
 DbAnalysisByFormReportTable
 DbJobReportTable
 DbTaskReportTable
 DbUserAclsReportTable
 TasksReportTable
 DbAttachmentReportTable

Click on the **Sorting** tab.

General Visibility Navigation **Sorting** Groups Filters Data Output

Sort on:

Expression	Direction
=Fields!DB_Title.Value	Ascending
=Fields!DB_Server.Value	Ascending
*	

Click on the first expression and a drop down list appears.

Expression	Direction
▶ =Fields!DB_Title.Value	Ascending
<Expression...>	Ascending
* =Fields!DTR_Count.Value	
=Fields!DTR_DocsWithAttachments.Value	
=Fields!DTR_DocsWithChildren.Value	
=Fields!DTR_DocsWithComposite.Value	
=Fields!DTR_DocsWithDocLinks.Value	
=Fields!DTR_DocsWithEncryption.Value	
=Fields!DTR_DocsWithForm.Value	
=Fields!DTR_DocsWithImages.Value	
=Fields!DTR_DocsWithMime.Value	
=Fields!DTR_DocsWithObjects.Value	
=Fields!DTR_DocsWithReaders.Value	
=Fields!DTR_DocsWithSignatures.Value	
=Fields!DTR_DocsWithWriters.Value	
=Fields!DTR_Key.Value	
=Fields!DTR_LastDocAccessed.Value	

Select the field(s) that you want to sort on. This is where it can get challenging to figure out which fields belong to which table. I usually leave this setting and return to it later.



Click **OK** to close the **Table Properties** dialog box.

Matching Fields to Tables

The **NMSP User Guide** contains additional design information for some of the data tables. For example, search on “DBReportTable” in the **NMSP User Guide** and you will find a table containing a list of fields, value types, and descriptions.

[Appendix: Reference Information](#) : Migrator for Notes to SharePoint Reporting Data Tables

Migrator for Notes to SharePoint Reporting Data Tables

DbReportTable

This table provides access to discovered Notes Database information compiled by the Migrator Console application. Each field in this table is prefixed: "DB_".

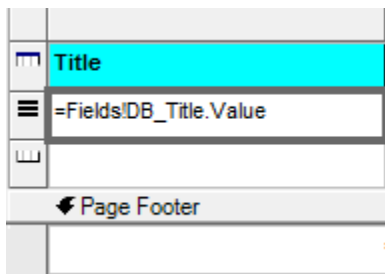
Table 2. DbReportTable

Column	Value Type	Description
DB_FilePath	String	Full File System Relative Pathname to this Database
DB_FileName	String	File Name and extension of this Notes Database, excluding path
DB_Server	String	Name of the Server hosting this database. May be blank or '(Local)' if located on the current machine.
DB_TemplateBase	String	Name of the base template in the event that this database's template inherits from another template.
DB_IsTemplate	Boolean	True if this database is a Template



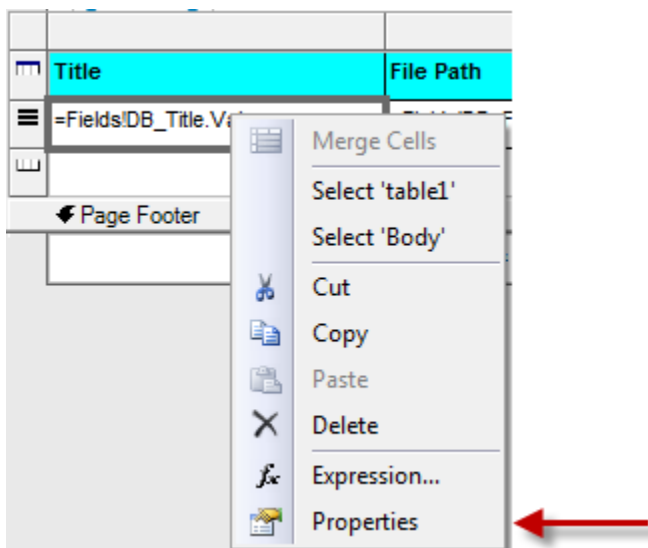
Setting Column Values in Report Tables

Now you can edit the cells in the report table. Select the first cell in the first column in the table.

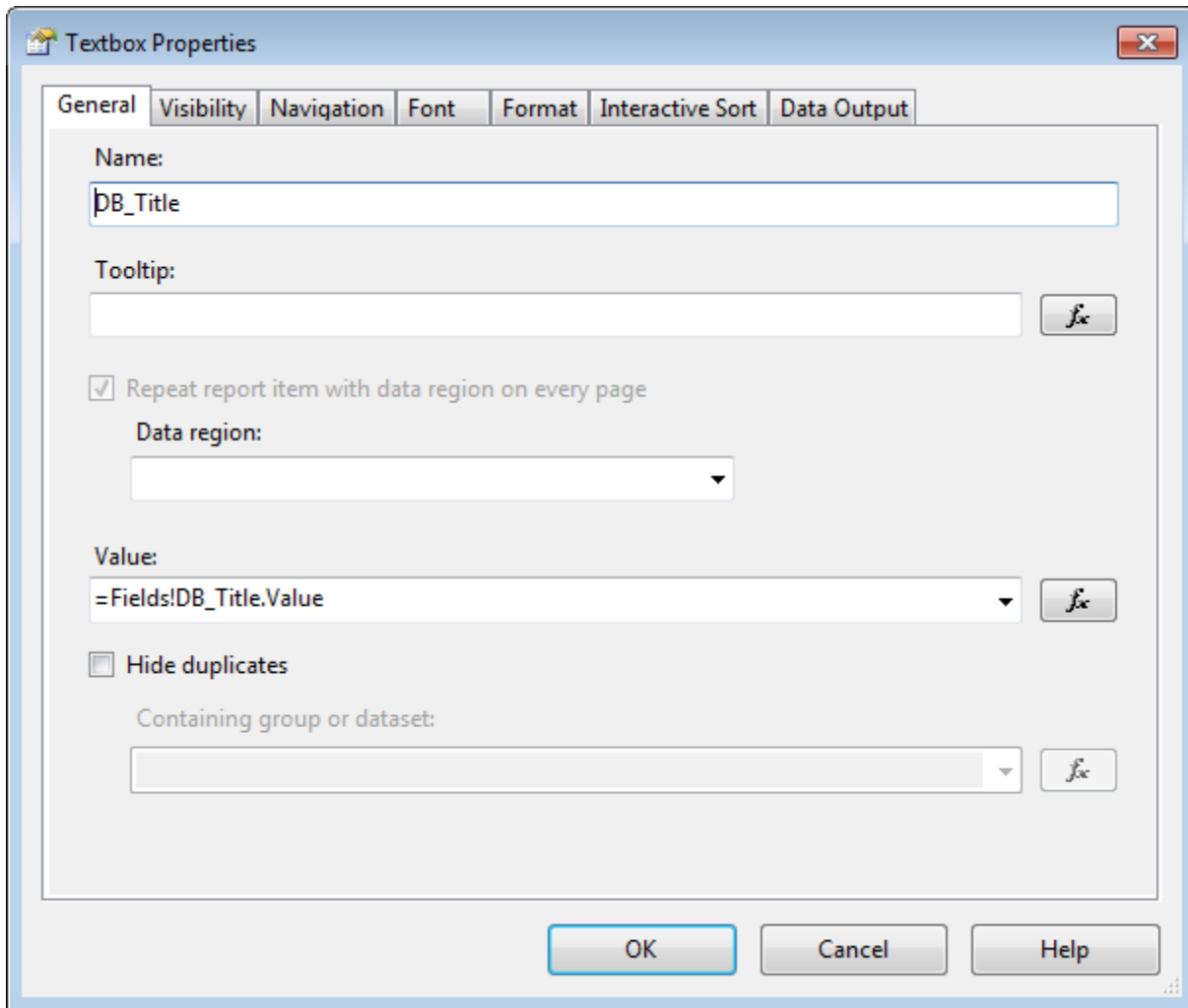


A screenshot of a report table. The first cell in the first column is highlighted in cyan and contains the text "Title". Below it, the second cell in the first column contains the expression "=Fields!DB_Title.Value". The table has a "Page Footer" section below the main body.

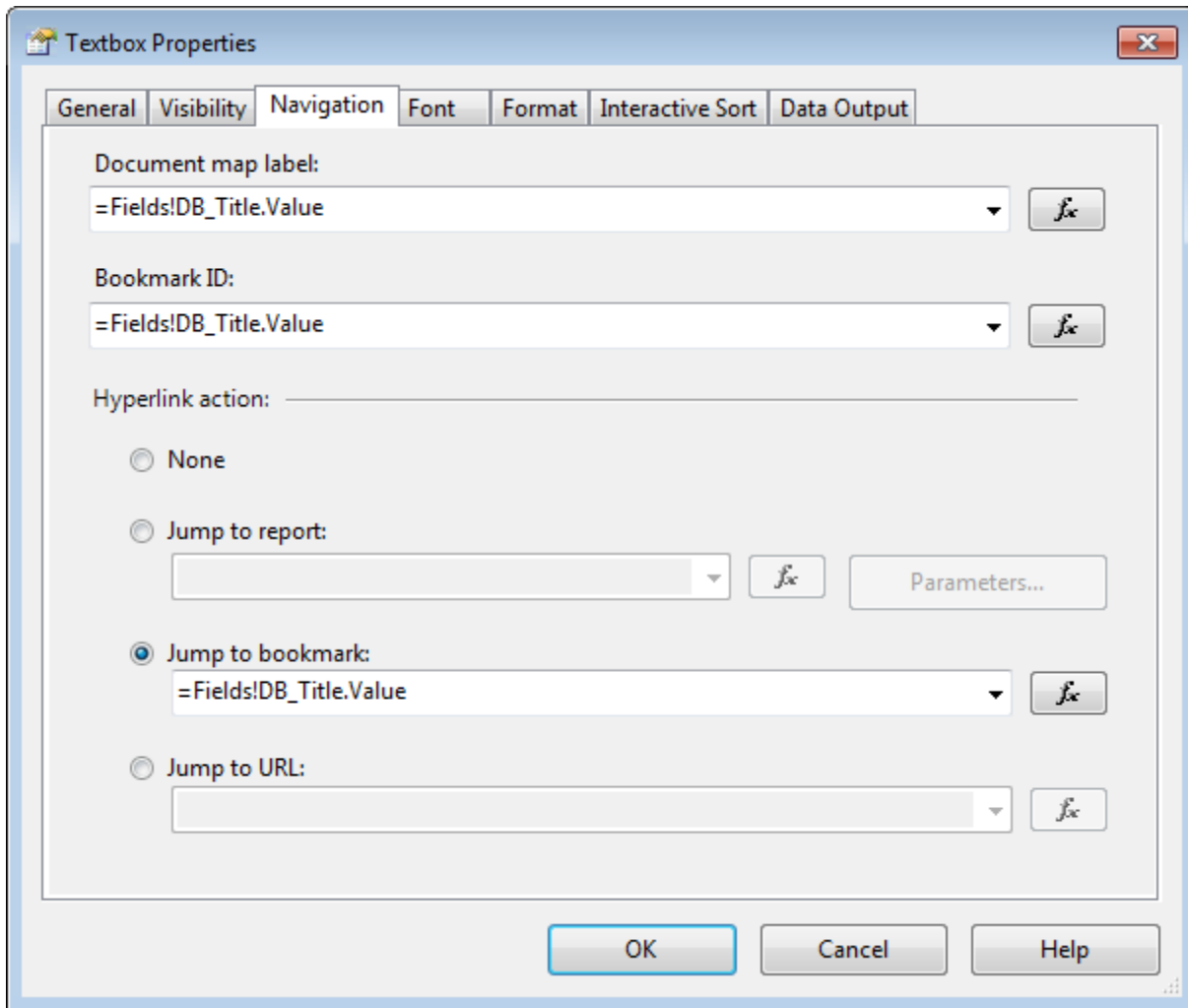
Right-click on the cell and select **Properties**.



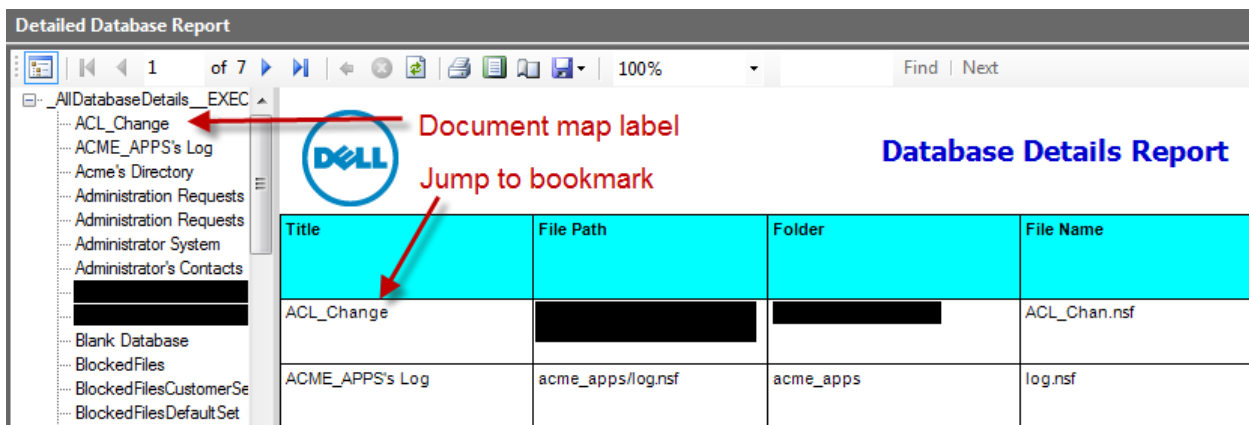
The Textbox Properties screen appears. You can edit the **Name** and the **Value** of the cell.



There are several more advanced settings that you can set, too. You could use the Navigation tab to define the navigation.

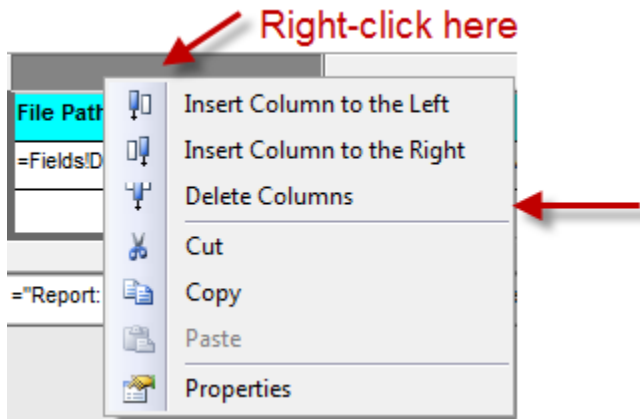


The screen capture below shows the relationship between the **Document map level** and **Jump to bookmark** properties.



To delete a column, right-click on the column and select **Delete Columns**.

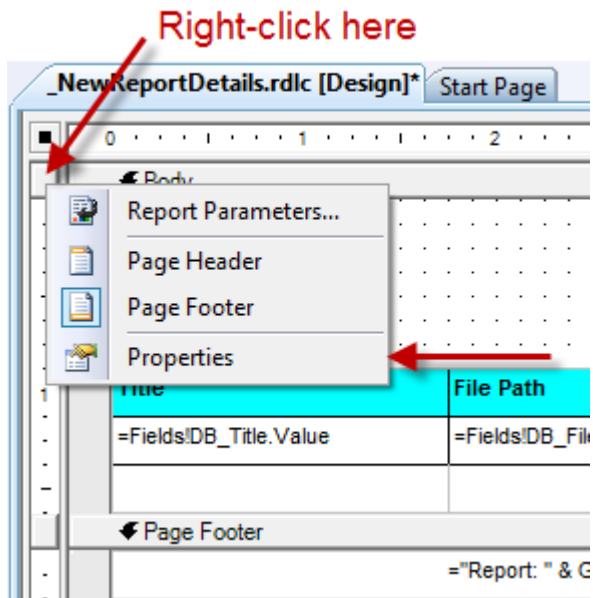




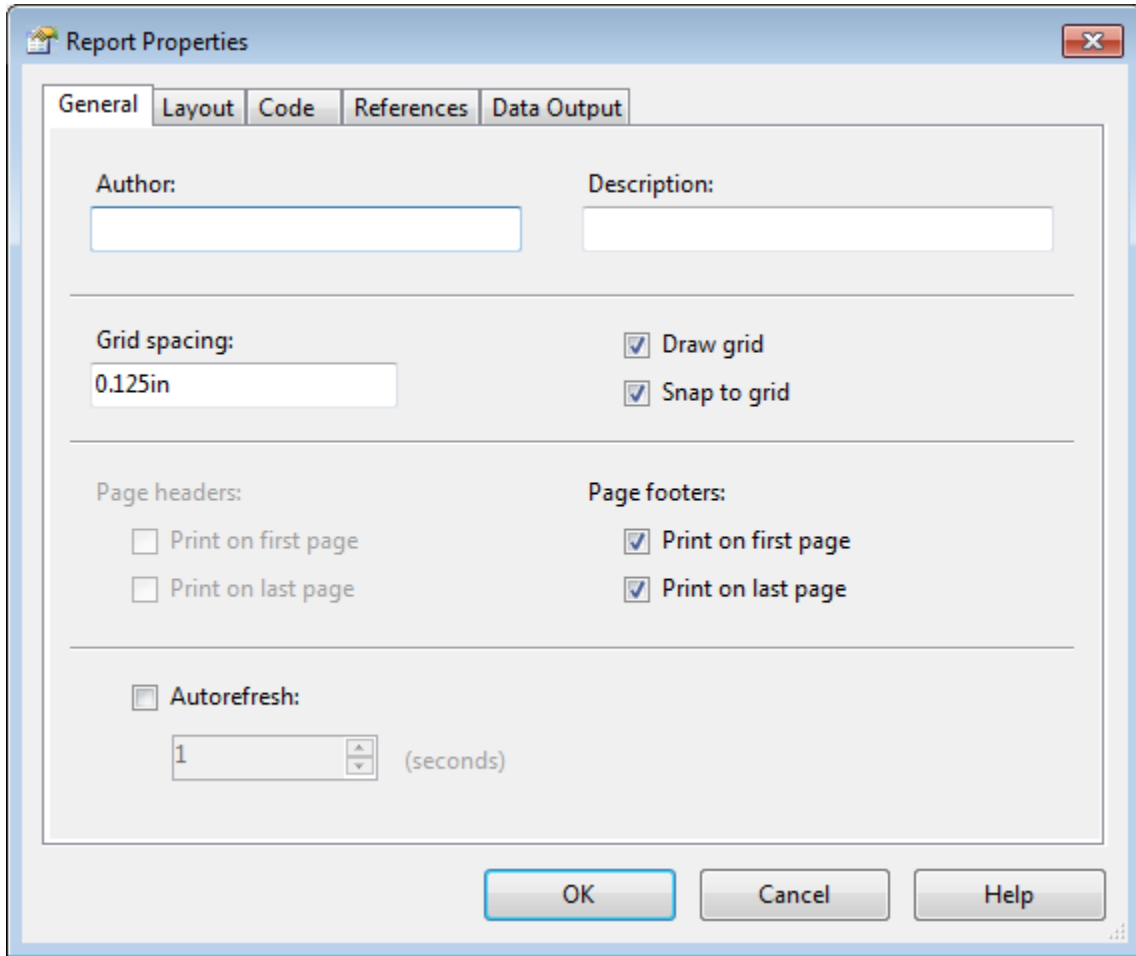
To insert a column, right-click on the column and select **Insert Column to the Left** or **Insert Column to the Right**.

Report Properties

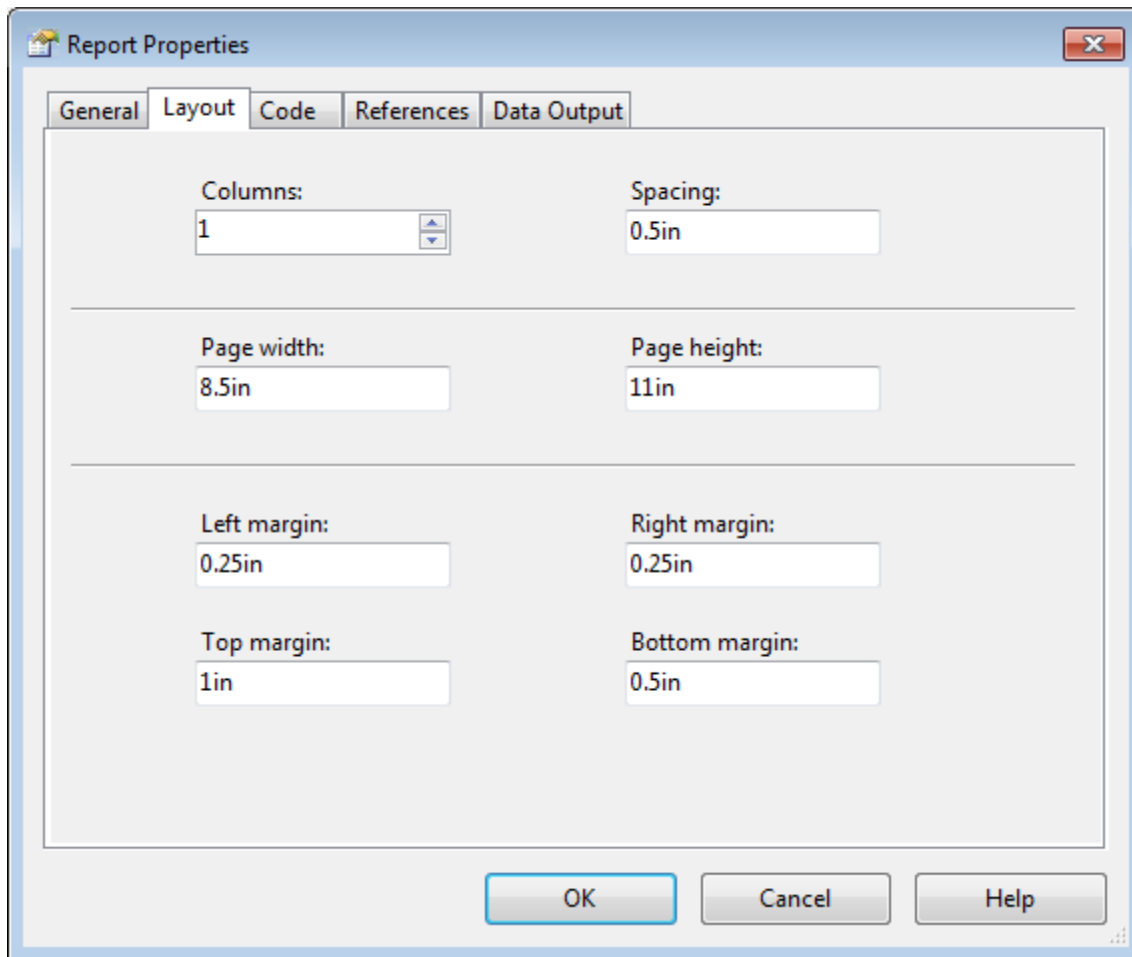
You can edit the report properties by right-clicking as seen below. Then click on **Properties**.



The **Report Properties** screen is displayed. In the **General** tab, you can edit the **Author** and **Description** properties.



Click on the **Layout** tab. You can edit the page layout in the **Layout** tab.

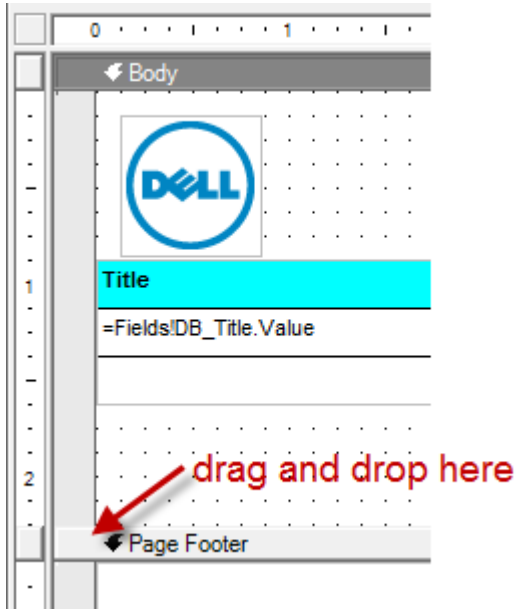


Click OK to accept changes and close the **Report Properties** screen.

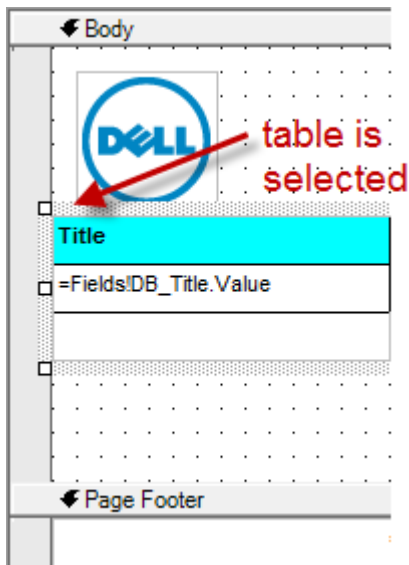
Add a Chart to the Report

I prefer to use charts to display summary data. A visual representation of data is much easier to understand than a table of numbers. You need to make room in the report to add a chart.

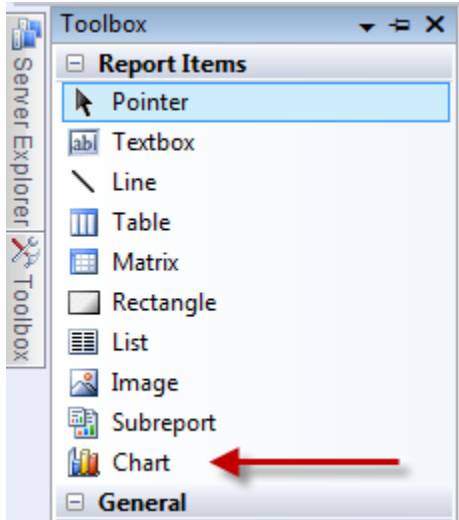
First, drag the Page Footer down to make more space.



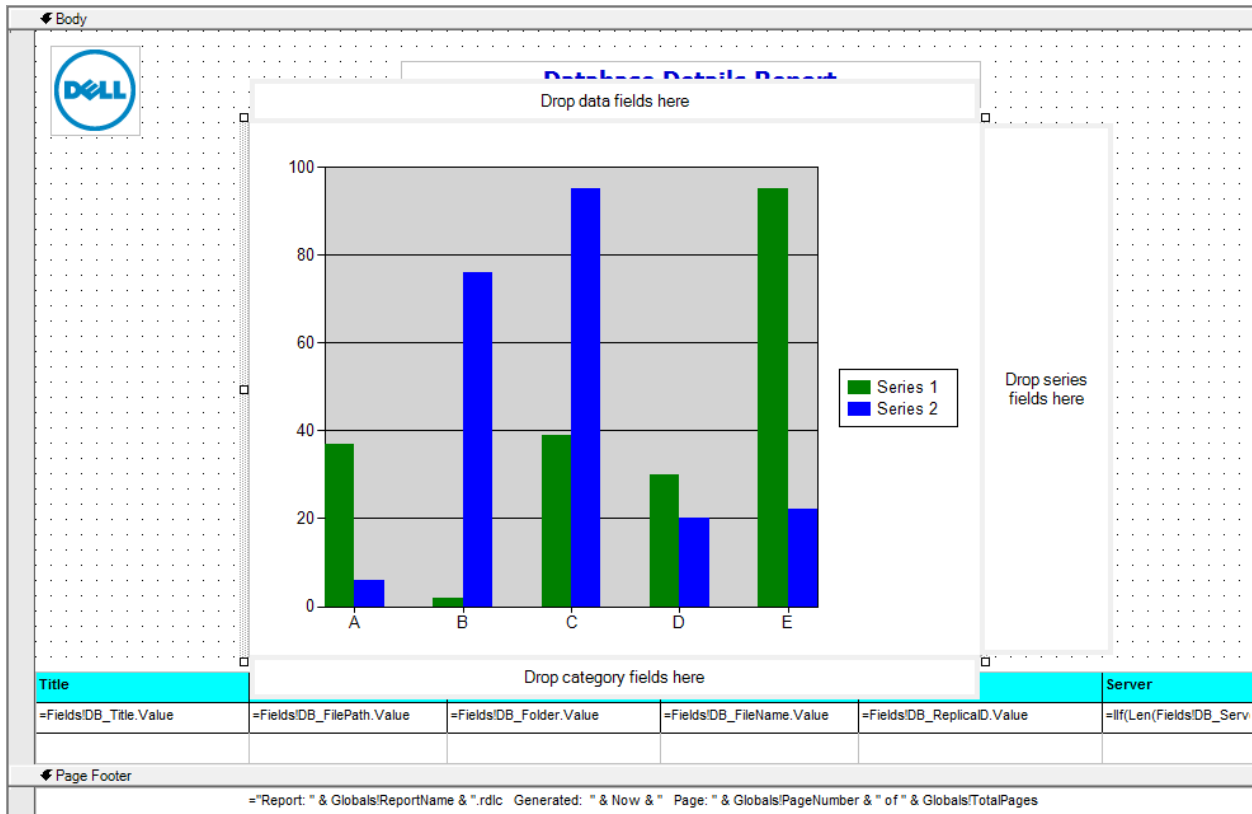
Select the table so that it looks highlighted as below. Drag the table down to the Page Footer to free up space.



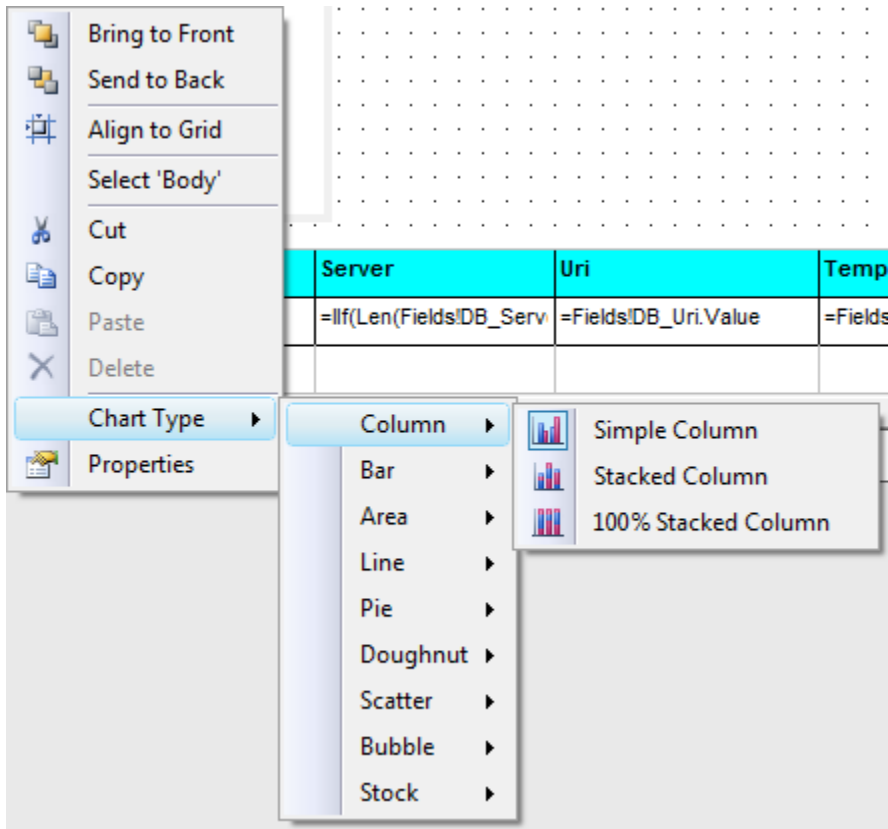
Click on the **Toolbox** and click on **Chart**.



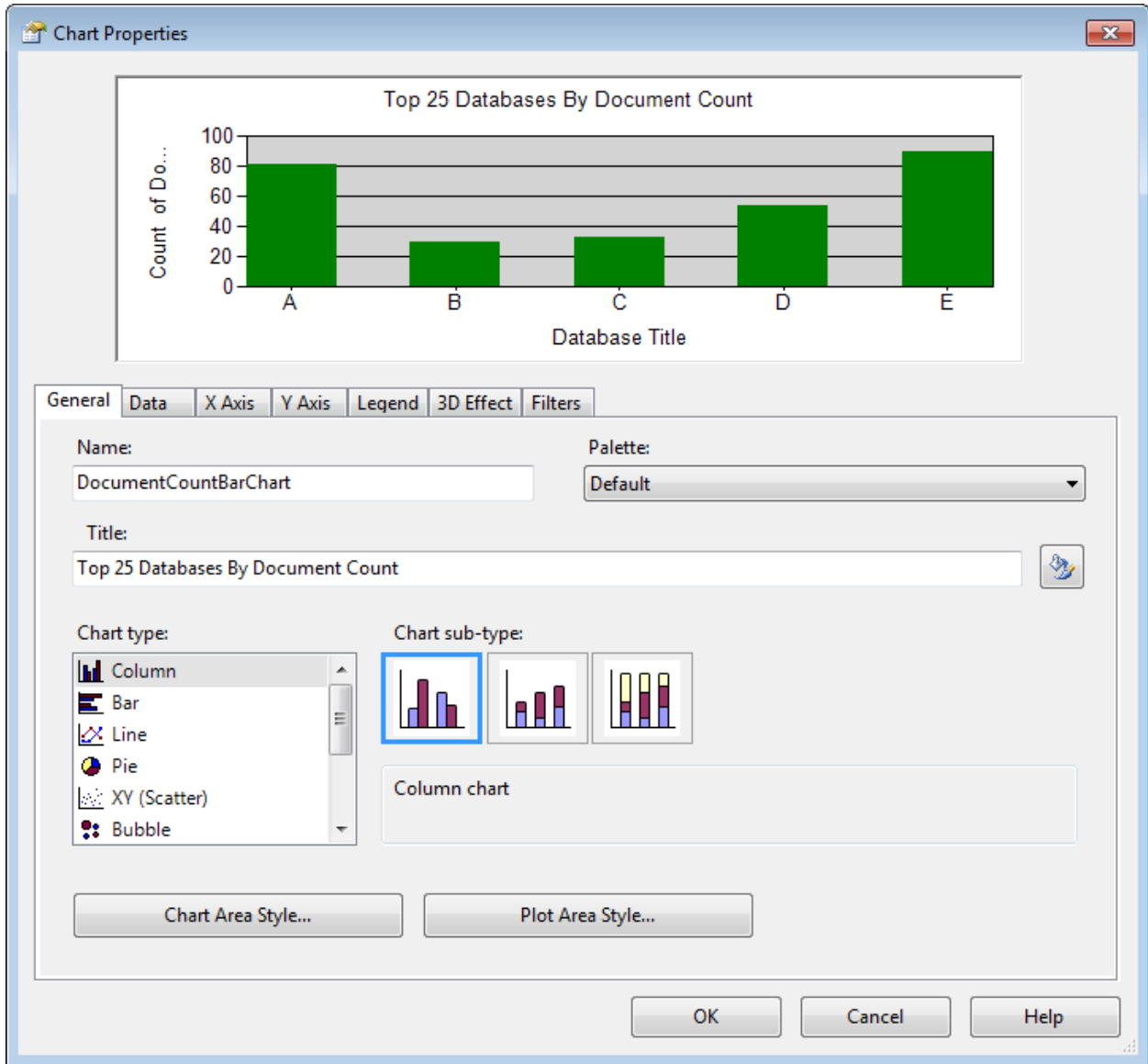
Move the mouse to the free space on the report. Create the chart object by clicking and holding the mouse on the report and then dragging the end point for the chart and releasing the mouse.



Set the chart type by right clicking on the chart object and selecting **Chart Type \ Column \ Simple Column**.



Right-click on the chart object and select **Properties**. I am showing the **Chart Properties** for a chart that I created previously.



I filled out the **Name** and **Title** properties.

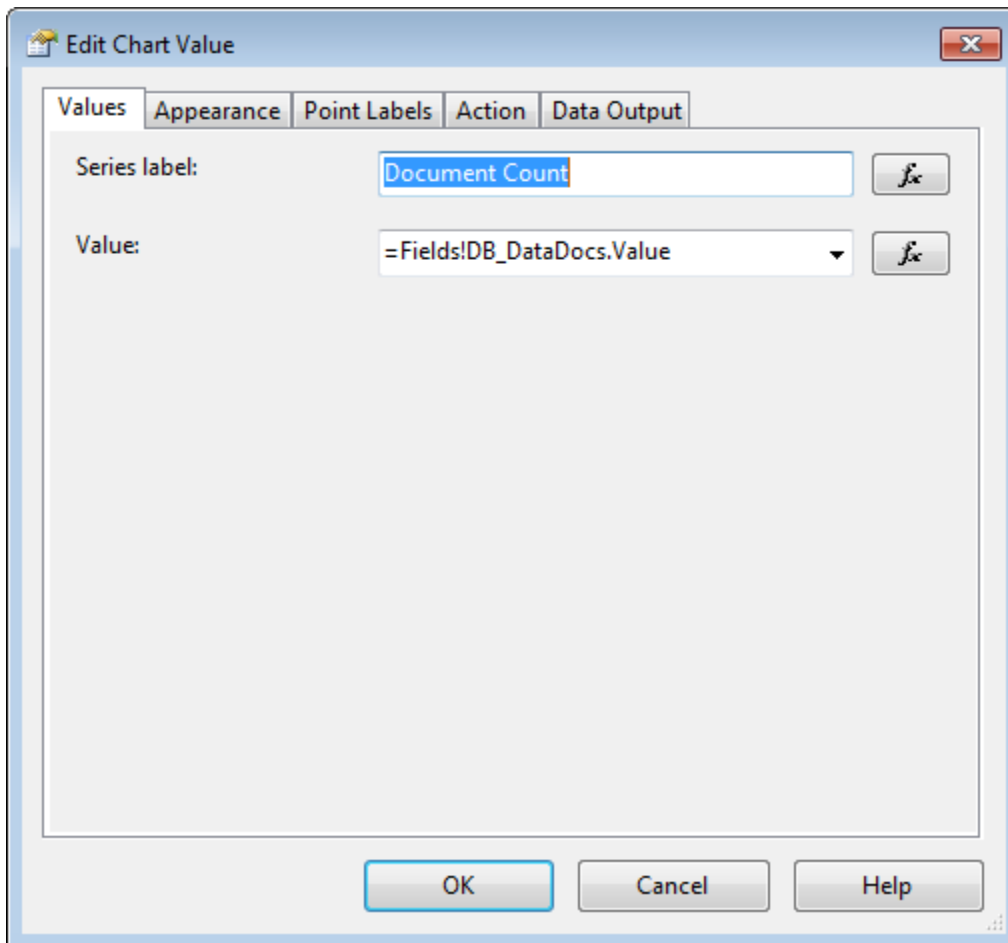
Click on **Data** to see the data properties. I selected the **DbReportTable** dataset.

The screenshot shows a configuration window with the following sections:

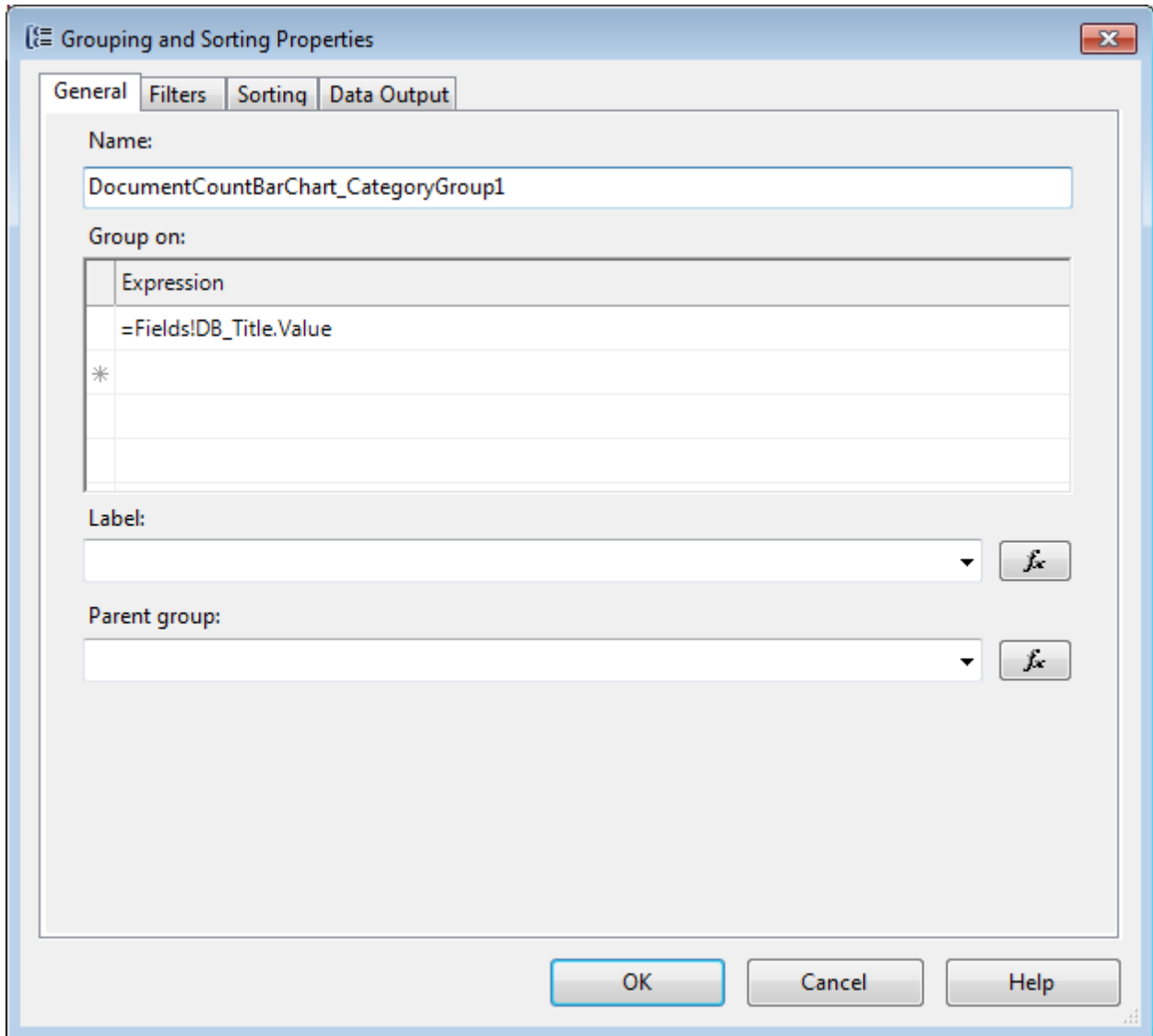
- General** | **Data** | X Axis | Y Axis | Legend | 3D Effect | Filters
- Dataset name:** DbReportTable
- Values:** Document Count (with Add..., Remove, and Edit... buttons)
- Category groups:** DocumentCountBarChart_CategoryGroup1 (with Add..., Remove, and Edit... buttons)
- Series groups:** (with Add... and Edit... buttons)



I selected the **Document Count** value by clicking on the **Edit...** button. I clicked **OK** to accept the value.



I added the category group value by clicking on the **Edit...** button.



Click **OK** to accept the changes and close the screen.

I enter a name for the category group and select a field to group the values on.

Name:
DocumentCountBarChart_CategoryGroup1

Group on:

Expression
=Fields!DB_Title.Value
<Expression...>
=Fields!DB_DatabaseSize.Value
=Fields!DB_DataDocs.Value
=Fields!DB_FileName.Value
=Fields!DB_FilePath.Value
=Fields!DB_Folder.Value
=Fields!DB_ReplicaID.Value
=Fields!DB_Server.Value
=Fields!DB_Title.Value

Click on the **Filters** tab and select an expression to filter on. In this example, I want to include only the databases that have the top 25 document counts.

General Filters Sorting Data Output

Filter grid:

Expression	Operator	Value	And/Or
=Fields!DB_DataDocs.Value	Top N	=Parameters!Chart_...	
<Expression...>			
=Fields!DB_DatabaseSize.Value			
=Fields!DB_DataDocs.Value			
=Fields!DB_FileName.Value			
=Fields!DB_FilePath.Value			
=Fields!DB_Folder.Value			
=Fields!DB_ReplicaID.Value			
=Fields!DB_Server.Value			
=Fields!DB_Title.Value			

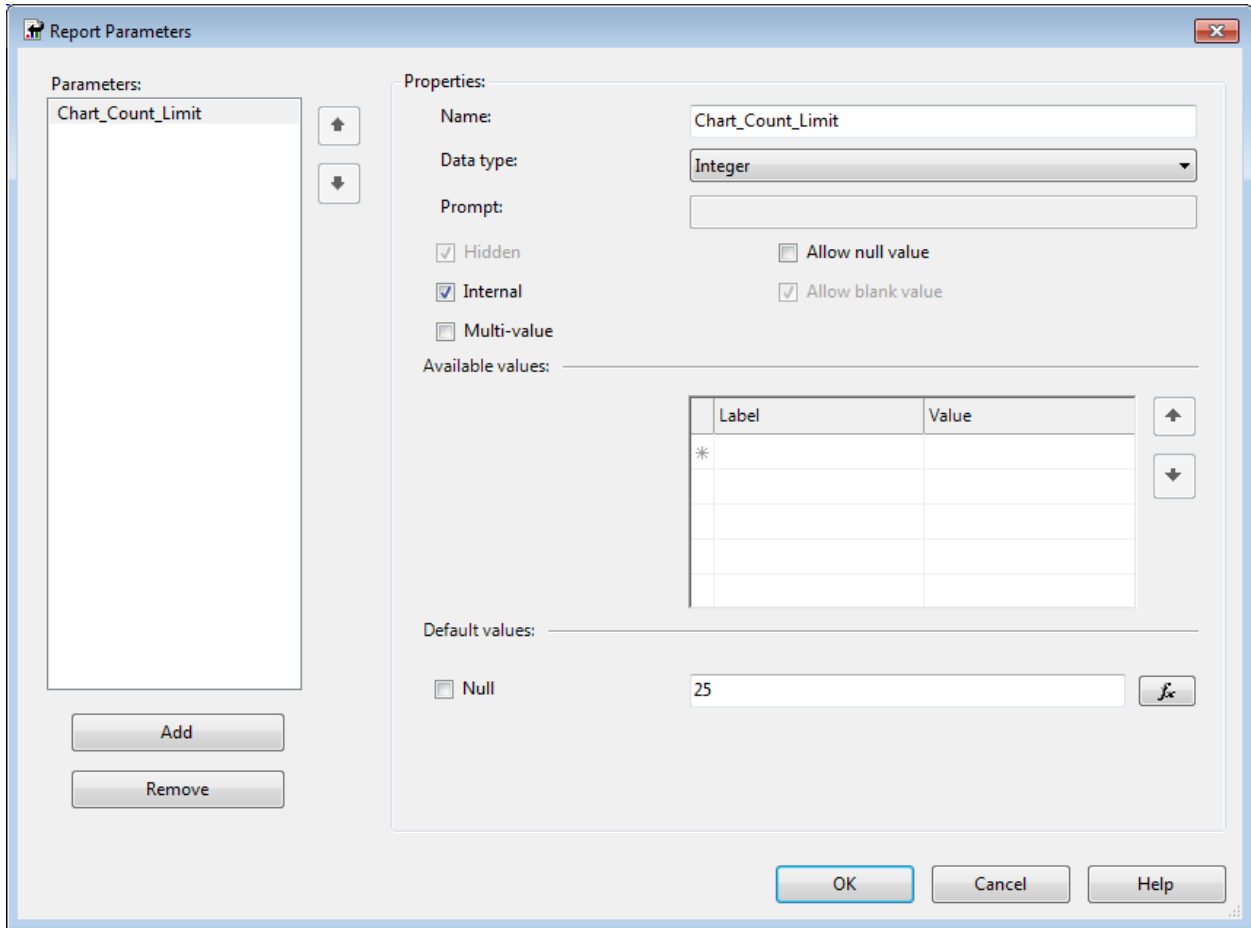
I select **Top N** for the Operator. This will result in the top N values being displayed in the chart.

The **Value** I entered is: =Parameters!Chart_Count_Limit.Value

Note: You must include the equal sign in the expression!

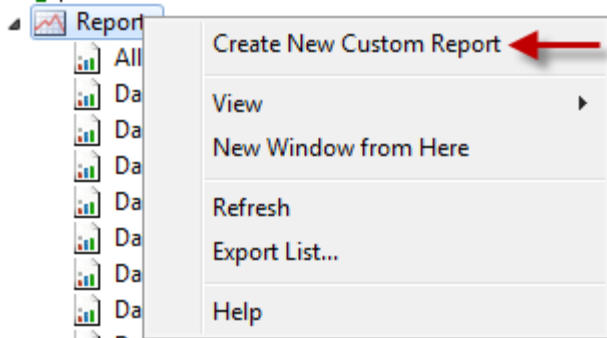


In this example, the **Value** comes from a parameter that I defined in the **Report Parameters** properties. I set the default value of the **Chart_Count_Limit** property to **25**. N = 25.

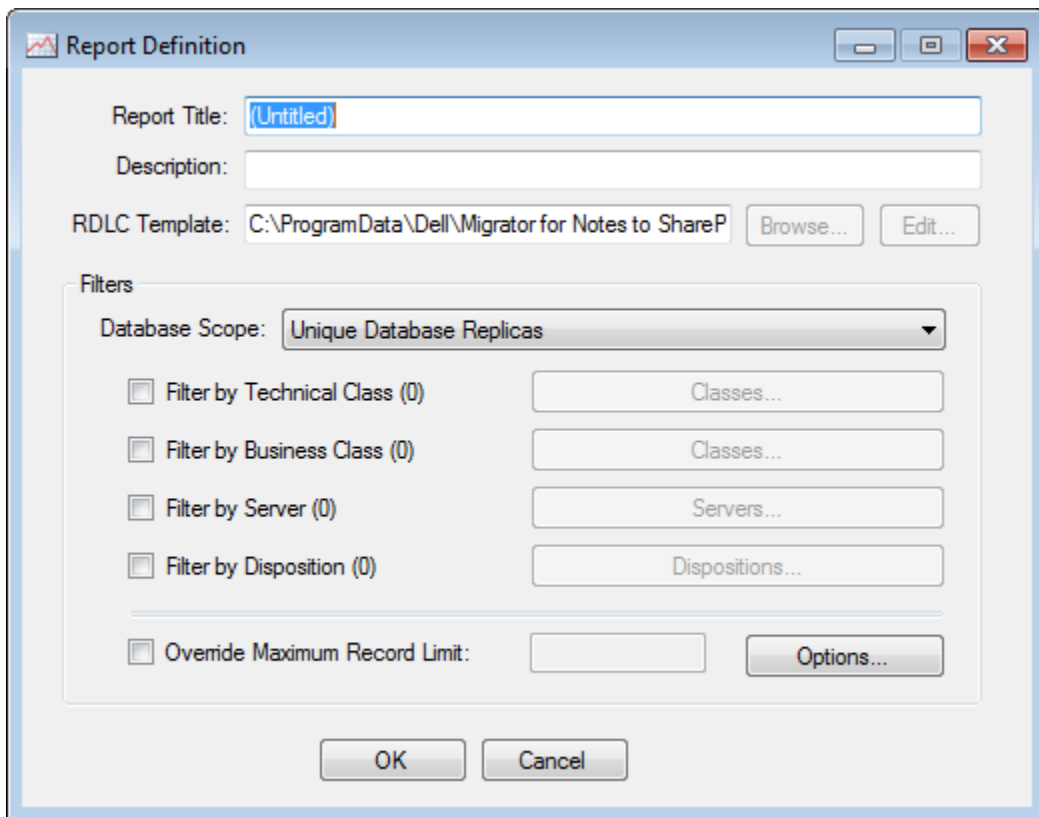


Adding the New Report to Notes Migrator for SharePoint

To add a new report to the reports list in NMSP, right-click on **Reports** and click on **Create New Custom Report**.



The **Report Definition** screen appears.



Edit the **Report Title**:

Report Title:

Edit the **RDLC Template** file path:

RDLC Template:



Set the **Filters**:

Filters

Database Scope: Unique Database Replicas

Filter by Technical Class (0) Classes...

Filter by Business Class (0) Classes...

Filter by Server (0) Servers...

Filter by Disposition (0) Dispositions...

Override Maximum Record Limit: Options...

I typically leave the filters to use the **Unique Database Replicas** scope. I can always come back and change the filters before running a new report.

Note: You can create a hard-coded filter within a report or use the filters that appear in the filter section of the **Customize Report** screen. You cannot create a new filter and set it before running a report. This type of filter feature is not supported using **Report Viewer 2008** within NMSP.

Click **OK** to accept the changes and close the screen. The new report will appear in a list of reports in a folder named **Custom Reports** in NMSP. Click on the report to view it in NMSP.



Conclusion

This concludes the example of how to create a custom report in Notes Migrator for SharePoint. I recommend opening up and looking at the design of some of the existing reports for examples of what you can do.

Key points to note are:

1. Install the correct version of the Report Viewer software
2. Install Microsoft Visual Studio 2008
3. Start with an existing report to create a new report

