

Quest® MessageStats® Report Pack for
Notes® 7.8
User Guide



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Legend

-  **WARNING:** A WARNING icon indicates a potential for property damage, personal injury, or death.

-  **CAUTION:** A CAUTION icon indicates potential damage to hardware or loss of data if instructions are not followed.

-  **IMPORTANT NOTE, NOTE, TIP, MOBILE, or VIDEO:** An information icon indicates supporting information.

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Report Pack Overview

- [About the Notes Report Pack](#)
- [How Do the Notes Report Packs Differ?](#)
- [Application Components](#)
- [Distributed Installation](#)

About the Notes Report Pack

The MessageStats Report Pack for Notes extends MessageStats by adding the ability to gather configuration and content information for the Notes environment.

The report pack stores the information in the MessageStats database, to which additional tables are added when you install the report pack. The database provides content for the web-based MessageStats Reports.

You can use the report pack as an assessment tool in planning for a Notes to Exchange migration.

How Do the Notes Report Packs Differ?

The MessageStats Report Pack for Notes primarily gathers report information directly from the Domino servers in your Notes environment.

The report pack includes reports about mailbox sizes, security, and delegates as well as reports about mailbox content such as private and shared folders, encrypted messages, and links. Other reports provide inventory details about your Domino servers, users, and mailboxes, allowing you to identify orphaned mailboxes or inactive mailboxes.

An earlier report pack, MessageStats Report Pack for Lotus Notes Migration 1.0, collected all its report information from a Quest Notes Migrator database.

The MessageStats Report Pack for Notes, version 2.0 and later, contains some of the same reports that were in the MessageStats Report Pack for Lotus Notes Migration 1.0 release. Specifically the newer report pack includes the following Notes Migration status reports:

- Migration Status per Collection
- Migration Status per Server
- Mailbox Comparison
- Distribution List Provisioning
- NSF Status

Information for the Notes Migration status reports is collected directly from a Notes Migrator database.

If you also want to view the Notes Pre-Migration Assessment reports, based on information in a Notes Migrator database, you can install the MessageStats Report Pack for Lotus Notes Migration 1.0 release as well.

Application Components

MessageStats is comprised of the following key components:

- MessageStats Server
- MessageStats Database
- MessageStats Reports

You must have the MessageStats core product installed before you can install the MessageStats Report Pack for Notes.

MessageStats Server

The MessageStats Server consists of the following components:

- an MMC (Microsoft Management Console) client console
- a scheduler service
- task processors

The task processors that are installed with the report pack collect and process messaging information from a Domino database.

MessageStats Database

MessageStats stores the information in a centralized SQL database, which provides the content for web-based reports.

MessageStats Reports

MessageStats Reports provide summary and detailed information that includes critical metrics for resource usage, capacity, storage use, delivery times, and migration preparedness.

If your MessageStats installation is all on one computer, you would install all the report pack components on the same computer. However, if you have a distributed MessageStats installation, you must distribute the report pack components as well.

Distributed Installation

In larger installations, and to experience enhanced performance and scalability, you might choose to have the MessageStats components installed on separate computers.

In this situation, you must also install the corresponding Notes report pack components on separate computers. For example, to install the Notes task processors, the destination computer must have the MessageStats task processors installed.

For more information, see [Minimum System Requirements](#) on page 9.

Preparing for Installation

- [Supported Environments](#)
- [Minimum System Requirements](#)
- [Required Rights and Permissions](#)
- [How Are the Permissions Used?](#)
- [Installing the Notes Report Pack](#)

Supported Environments

The following list describes the environments that the report pack supports:

- Lotus Domino \ Notes 6
- Lotus Domino \ Notes 7
- Lotus Domino \ Notes 8 and 8.5
- IBM Domino \ Notes 9.0 and 9.0.1
- HCL Domino \ Notes 11.0 and 11.0.1

Minimum System Requirements

Before you install the MessageStats Report Pack for Notes, you must have core MessageStats 7.8 installed. The report pack installs the report pack task processors, the new Notes reports, and adds the Notes node to the MessageStats console.

You must meet the minimum hardware requirements for MessageStats. For information about the minimum hardware requirements for MessageStats, see the *MessageStats Quick Start Guide*.

If your MessageStats installation is distributed, you must install the corresponding report pack components on the same server as the core MessageStats components. The following list shows the components in the order in which they must be installed on the different servers:

Table 1. Correlation between core components and report pack components.

| Server Installation | Installed Components |
|------------------------------------|---|
| MessageStats Database | MessageStats Database 7.8 Notes Report Pack Database components |
| MessageStats Task Execution Server | MessageStats Task Processors 7.8 Notes Report Pack Task Processors |
| MessageStats Console | MessageStats MMC Client Console 7.8 Notes Report Pack MMC Client Console |
| MessageStats Reports | MessageStats Reports 7.8 Notes Report Pack Reports |

Software Requirements

You install the report pack components on servers on which the core MessageStats components are already installed. You must meet the software requirements for MessageStats. See the *MessageStats Quick Start Guide* for the software requirements for the different MessageStats components.

The following table contains any additional software requirements for the report pack:

Table 2. Minimum software requirements for the Notes report pack.

| Type | Minimum Requirement |
|---------------------|--|
| Task Processors | The Notes client must be installed on the server that hosts the MessageStats task processors. NOTE: The Notes client must have been opened at least once and connected to a Domino server before the client can be used in MessageStats. |
| MMC Client Console | At minimum, Microsoft .Net Framework 4.7.2 must be installed on the server that hosts the MessageStats MMC Client Console. |
| Environment | At least one server running Lotus Domino 6.0, Lotus Domino 8.0, Lotus Domino 8.5, IBM Domino 9.0 or 9.0.1, or HCL Domino 11.0 or 11.0.1. |
| Additional Software | MessageStats 7.8 |

Required Rights and Permissions

This section lists the rights and permissions required to install the MessageStats Report Pack for Notes, to gather appropriate information, and to compile reports.

Installation Rights

The following rights are required to install the report pack:

- Local Administrator rights
- MessageStats Admin rights on the server that houses the MessageStats database

Operational Rights

The following rights are required by the Windows account under which the MessageStats gathering process is run:

- MessageStats Admin rights on the server that houses the MessageStats database
- Local Administrator rights on the task execution server

The following rights are required by the Windows account that is used to run the MessageStats client console:

- Belong to the MessageStats Admin local group on the server that hosts the MessageStats scheduler service (MessageStats Server)

The following rights are required by the Notes user account that is used to run the report pack gathering tasks on the Domino servers:

- Have at least Designer-level access to all Domino databases. (This can be done by adding the user to the Local Domain Servers administration group.)
- To gather private folder information, the Notes user must also be on the Trusted Server list in the Domino Server Document of the server from which data is collected.

To add a Notes User to the Trusted Servers list in the Domino Server Document

- 1 In the Domino Directory, go to the Security section.
- 2 Add the user name (from the Notes ID that the report pack gathering tasks are using) to the Trusted Servers list.

Database Catalog on each Domino Server

To be able to enumerate the databases on the Domino server, the report pack requires that there be a database catalog (catalog.nsf) available locally on each Domino server.

How Are the Permissions Used?

During the Database Enumeration task, the report pack accesses the user activity log within each database. This allows the report pack to gather information about who last accessed the database and when it was accessed.

If the user activity log of a database is configured with the “Activity is Confidential” option, then the Notes gathering account must have at least Designer-level access to the database to retrieve the activity.

If you do not want to grant Designer-level access to the Notes gathering account, then read-only access to all of the databases can be used. The report pack does not perform any explicit write operations to any of the databases. (Some of the Notes API functions might perform implicit write operations, such as updating the activity log.)

To gather private folder information, the Notes user account used to gather from the Domino server must still be added to the Trusted Server list.

MessageStats Reports Security Settings

For all servers housing the MessageStats Reports web server, ensure the following:

- On the MessageStats Reports virtual directory, ensure that Integrated Windows Authentication is selected.
- The user accessing the website must be in the Web Report Users local group to view the site. The user can also be in the Web Report Administrators and Web Report Authors local groups, depending on your security hierarchy.

The account must also be in the MessageStats Admin local group (for read and write access) or MessageStats Web local group (for read access only).

Installing the Notes Report Pack

Use the following procedure to install the report pack.

To install MessageStats Report Pack for Notes

- 1 Log on to your system using MessageStats service account.
- 2 Double-click the **autorun.exe** file and select the **Install** tab.
- 3 Select the **Notes** link.
- 4 Read the license agreement and select the **I accept the terms in the license agreement** check box and click **Next**.
- 5 Select the features that you want to install and click **Next**.
- 6 Verify the folder in which the report pack is to be installed and click **Next**.

- 7 Verify the SQL instance (MessageStats database) on which you are installing the report pack database components and click **Next**.
- 8 Click **Next** to begin the installation.
- 9 When the installation is complete, click **Finish**.

Configuring the Report Pack

- [Setting Up the Report Pack for Notes](#)
- [Introducing the MessageStats Console](#)
- [The MessageStats Node](#)
- [The MessageStats Server Node](#)
- [The Database Management Node](#)
- [The Notes Node](#)
- [MessageStats Reports Node](#)
- [Task Execution Servers Node](#)
- [Managing Tasks](#)

Setting Up the Report Pack for Notes

To perform your first successful gathering of Notes information, you must do the following steps:

- 1 Create a connection to the Domino domain. As part of the connection process, you must specify the Notes credentials that will become the default credentials used by all the report pack gathering tasks.

For information about how to connect to a Domino domain and to specify the Notes credentials used for gathering tasks, see [Connecting to a Domino Domain](#) on page 15.

For information about changing the default Notes credentials, see [Specifying Notes Credentials](#) on page 27.

- 2 If you are migrating from Notes to Exchange using Quest Notes Migrator for Exchange, the Notes Migration Status reports can show migration progress. To populate the migration reports, you must create a connection to a Notes Migrator for Exchange database.

For information about how to connect to a Notes Migrator database, see [Connecting to a Notes Migrator Database](#) on page 17.

- 3 Create and run a Notes Users gathering task.
- 4 Create a Notes Databases gathering task.
- 5 To populate the remaining reports, create Notes Mailbox Content and Notes Storage gathering tasks.

For information about creating gathering tasks, [About the Create Task Wizard](#) on page 31.

i | **IMPORTANT:** To be able to enumerate the databases on the Domino server, the report pack requires that there be a database catalog (catalog.nsf) on each Domino server.

Introducing the MessageStats Console

This section contains information about how to use the MessageStats Console. It describes the kind of information MessageStats gathers, how to configure a default gathering, how MessageStats stores the collected data, and how to view reports based on the gathered information.

The MessageStats Console consists of an MMC (Microsoft Management Console) client console, a scheduler service, and task processors. Like all MMC consoles, the MessageStats Console consists of a window divided into two panes:

- The left pane displays the console tree. The console tree is a hierarchical structure that shows the items (nodes) that are available in a console. These items can include folders, snap-ins, controls, Web pages, and other tools.
- The right pane contains the details pane. The details pane shows information and functions that pertain to items in the console tree.

For information about MMC, please see the online help provided by Microsoft.

The MessageStats Node

By default, the Quest Software folder is expanded to show the MessageStats node. If you right-click the MessageStats node, the following options are available:

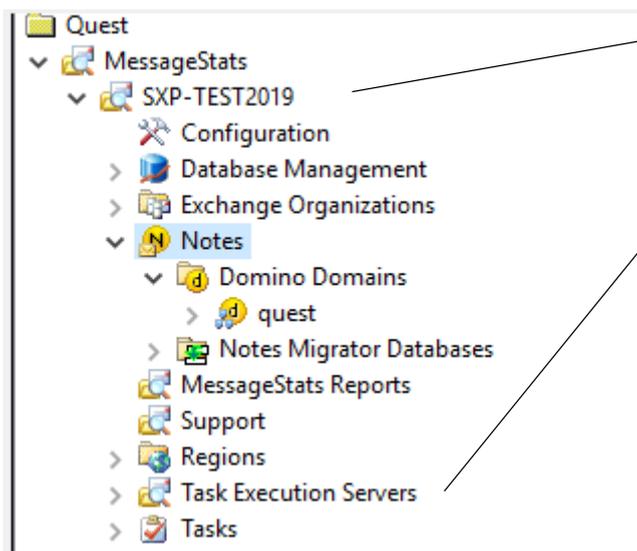
Table 1. MessageStats node shortcut menu.

| Menu Option | Description |
|----------------------|---|
| About | Provides version and copyright information about the product. |
| Connect | Opens the Connect to MessageStats dialog box, allowing you to connect to one or more MessageStats Servers. |
| New Window from Here | Launches a secondary window. This option is a MMC menu default. |
| Refresh | Allows you to refresh the MessageStats Console view. You can use this to update the view if you add new objects or tasks to the tree. |
| Help | Opens the online help. The online help and the MMC online help are available from the same system. |

The MessageStats Server Node

Typically, the MessageStats Server is the server on which the MMC console, Scheduler Service, and task processors are installed. In a distributed installation, you can install additional task processors on several computers to run large gatherings. Computers on which you install the task processors are called Task Execution Servers.

Using MessageStats, you can distribute your gathering work across several geographic locations or distribute the workload to occur during certain periods. By using more than one Task Execution Server, you can ensure that available resources can meet the gathering and processing requirements of particular tasks.

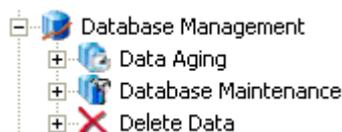


The server under the MessageStats node is the MessageStats server that houses the scheduler service.

Task Execution servers are the computers that host the task processors.

The Database Management Node

The MessageStats Database stores the information that is used by the reports. When the database is properly tuned, information can be efficiently stored, and the reports can quickly access the required data.



Over time, the MessageStats Database grows and the database server can become strained. However, it is critical that the database retain enough data for any historical reporting needs that might arise. You can use the Database Management functions to tune the database and remove obsolete data.

For information about Database Management, please see [Database Management](#) on page 23.

The Notes Node

The Notes node lists the Domino domains to which is connected. When you expand the Domino Domains node, the domains appear as child nodes. The right pane lists the connected domains and the server that is used as the primary directory server for the domain. For information about creating a connection to servers in a Domino domain, see [Connecting to a Domino Domain](#) on page 15.

If you are using Quest Notes Migrator for Exchange, you have the option to connect to a Notes Migrator database. Information from the database is used to populate the Notes Migration Status reports. For information about creating a connection to a Notes Migrator database, see [Connecting to a Notes Migrator Database](#) on page 17.

Connecting to a Domino Domain

You use the Connect option to connect to a Domino server that contains the primary Domino Directory. The report pack uses the Domino server as the directory server to enumerate a Domino domain and to connect to the domain. You also specify the Notes ID file and password that is used by the gathering tasks.

During connection, you can specify the Task Execution Server that is used to connect to the Domino domain. Task Execution Servers are the servers on which you installed the task processors.

Prerequisites for the Notes ID File

The Notes User account that is used must have Designer-level access on the Domino server. For private folder gatherings, the account must also have Trusted Server rights in the Domino Server Document of the server from which data is collected. For more information, see [Required Rights and Permissions](#) on page 10.

- i** | **IMPORTANT:** MessageStats relies on the Notes client to extract the user name from the Notes ID file and to verify the password for the ID file. If you are running the MessageStats console on a computer on which Notes is not installed, you can import the Notes ID file but "?????????" is displayed instead of the user name. The selected ID file and password can still be used by the Task Execution Server.

To connect to a Domino domain for the first time

- 1 Expand the **Notes** node and select **Domino Domains** in the treeview.
- 2 Right-click and select **Connect**.
- 3 Enter the name of a Domino server that contains the primary Domino Directory. You can specify the server name in one of the following formats:
 - canonicalized (CN=Server/O=Org)
 - abbreviated (Server/Org)
 - server common name (Server)

- 4 If your primary directory file name is different from the default name (names.nsf), enter the name of your primary Domino Directory in the Directory File Name box.

- 5 Click **Next**.

- 6 To connect to this domain with a Task Execution Server other than the default server, select a server in the Task Execution Server box. If you installed only one task execution server, this option is dimmed.

The Task Execution Server must have the Notes client installed. The Notes client must have been opened at least once and connected to a Domino server before the client can be used in MessageStats.

- 7 Select **Specify Explicit Notes ID**.

- a Click **Import ID File** and browse to the Notes User ID file you want.
- b Enter the password associated with the selected user ID file.

The Notes credentials that you specify can be used as the default credentials when you are connecting to additional Domino domains.

For Lotus Notes 7.0 and later, the password is validated when you click Connect. For Lotus Notes 6.0, the password is not validated until you run a gathering task against a Domino server.

- 8 Click **Connect**.

When you connect to an additional Domino domain, you have the option to use the default Notes credentials or to specify a different Notes ID and password. The Notes ID and password is used by the Task Execution Server to gather information from the Domino servers.

To change the default credentials that are used by Notes tasks, see [Specifying Notes Credentials](#) on page 27.

Changing the Directory Server for the Domain

At a later date, for performance reasons, you might want to change the directory server that is used to create the connection to the Domino domain.

To change the server used for the Domino domain connection

- 1 Expand the Domino Domains node and select a Domino domain.

- 2 Right-click and select **Properties**
- 3 From the server list, select a server that contains a primary Domino Directory.
- 4 Click **OK**.

Connecting to a Notes Migrator Database

Certain reports can be used to assess the progress of a Notes to Exchange migration. By connecting to a Notes Migrator for Exchange database, you can view data in the following “real-time” reports:

- Migration Status per Collection
- Migration Status per Server
- Mailbox Comparison
- Distribution List Provisioning
- NSF Status

You can connect to a Notes Migrator database that is on the same SQL instance as the MessageStats database, or to a remote Notes Migrator database on a different SQL server.

If you connect to a remote database, you must use SQL authentication to create a linked server connection.

To connect to a Notes Migrator database

- 1 Expand the **Notes** node and select **Notes Migrator Databases** in the treeview.
- 2 Right-click and select **Connect**.
- 3 Enter a descriptive name for the connection. This is the name used to identify the database in the Notes Migration Status reports.
- 4 Select the type of authentication for the database connection:
 - If you are connecting to a Notes Migrator database on the same SQL instance as the MessageStats database, you can select Windows Authentication and proceed to [Step 6](#).
 - OR -
 - If you are connecting to a Notes Migrator database on a different SQL server, you must select SQL Authentication.
 - a Enter the SQL user name and password that will be used to connect to the database. The SQL account must have the following database role memberships:
 - public
 - db_datareader

i | **IMPORTANT:** The Windows account that is used to run the MessageStats console must be a member of the **SQL setupadmin fixed server** role on the remote SQL server that hosts the MessageStats database. Only members of the setupadmin fixed server role have sufficient rights to create a linked server
- 5 Select the SQL server that contains the Notes Migrator database.
- 6 Select the Notes Migrator database that contains the migration data.
- 7 Click **Test Connection** to verify that the connection can be established.
- 8 Click **Save**.

Modifying SQL Credentials for the Connection

If you create a connection to a Notes Migrator database that is on a different SQL instance than the MessageStats database, you must create the connection using SQL authentication.

At a later date, you can modify the credentials. For example, if the password for the SQL account has changed, you can modify the password used for the connection.

To modify the SQL credentials

- 1 Select the Notes Migrator database in the treeview.
- 2 Right-click and select **Edit SQL Authentication Properties**.
- 3 Enter the change that you want to make:
 - Enter a different password for the displayed SQL account.
 - OR -
 - Enter a different SQL name and password.
- 4 Click **Save**.

MessageStats Reports Node

This node launches the MessageStats Reports component in the right pane. The reports node accesses the separate web-based reporting component that is hosted on an IIS server.

Before you create your task gathering, you must set up a connection to each of the Domino database instances from which you want to gather information.

Task Execution Servers Node

The Task Execution Servers node contains the servers on which you have installed task processors. In a complete installation, task processors are installed on the same server as the MessageStats scheduler server and the MMC client console.

Tasks that consume resources can be run on a dedicated Task Execution Server. You can create additional Task Execution Servers through a distributed installation. In a distributed installation, you can install task processors on additional servers to spread the gathering load.

Through the Task Execution Servers node, you can set properties for specific task execution servers. You can change the default task execution server, identify a path location to which the task log files are written, specify parameters for task logging activities, and set the number of task processors that can run concurrently. To gather information for the reports, the task processors must access the databases on the Domino server.

For more information about setting properties for a task execution server, see the *MessageStats Administrator Guide*.

Available Options for Task Execution Servers

When you right-click a task execution server, the following options are available

Table 2. Task Execution Server node shortcut menu.

| Menu Option | Description |
|----------------|---|
| Set as Default | Allows you to set the default task execution server that is used when you create new gathering tasks. NOTE: You can specify a different task execution server when you are creating a new task. |
| Remove Server | Removes the task execution server from the console. NOTE: To properly remove the task execution server, it is recommended that you remove the task processors from the server. When you remove the task processors, the server is automatically removed from under the Task Execution Servers node. |
| Refresh | Allows you to refresh the console navigation treeview. |
| Properties | Allows you to set the properties for the selected task execution server. For more information, see the <i>MessageStats Administrator Guide</i> . |
| Help | Opens the online help. The online help and the MMC online help are available from the same system. |

Managing Tasks

The Tasks node contains a list of all the tasks that you have configured and you can expand each task to show the individual gatherings that are included in the task. If you right-click the Tasks node, you can set properties for all tasks.

If you expand the Tasks node, you can view existing tasks and make changes to the individual tasks.

Expand the Tasks node to view the tasks that have been configured. The tasks are listed in the treeview.

You can view the current run of a task under the Active node. The individual component tasks that comprise the task are shown in the right pane.

Under the Historical node, you can view task occurrences that ran in the last seven days and before that.

The Sources node contains the sources that are associated with the task.

The tasks that appear in the Summary view provide the following information:

Table 3. Task Summary View options.

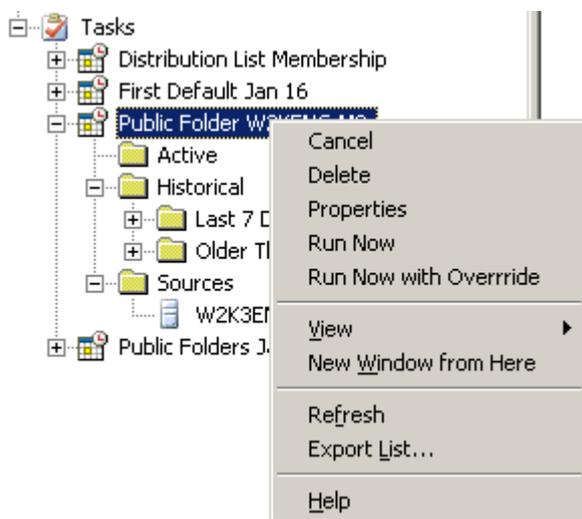
| Information | Description |
|-------------|---|
| Name | Displays the name assigned to the task. To change the name, you can open the Task Properties dialog box and change the task name on the first page. |
| Credentials | Displays the credentials used to run the task. If you need to change the credentials, you can open the Task Properties dialog box and edit the Task Credentials page. |

Table 3. Task Summary View options.

| Information | Description |
|-----------------|---|
| Schedule | Indicates the schedule frequency set for the task. To change the schedule, you can open the Task Properties dialog box and edit the Task Schedule page. |
| Next Occurrence | Indicates the next time the task will run. This information is based on the Task interval information you set on the Task Schedule page. |
| Description | Displays the description of the task as it appears on the Task Properties dialog box. |
| Progress | Displays a progress percentage and progress bar to represent all the constituent activities of the Task. |

Available Options for Tasks

If you right-click a task in the navigation tree or the Task Summary view, you can perform several actions:



The following table describes the options:

Table 4. Individual Task options.

| Option | Description |
|------------|--|
| Cancel | Cancels the task (or component tasks) that are not complete. If you cancel a task, component tasks in progress finish and all pending tasks are cancelled. |
| Delete | Deletes the task from the Task list. |
| Properties | Opens the Properties dialog box for the selected task. For information about individual task properties, see the chapters about Default Gatherings and Extending Default Gatherings. NOTE: If you select the Tasks node and right-click, you can set default properties for all tasks. For more information, see Configuring Task Default Properties on page 27. |
| Run Now | Allows you to start the task immediately. NOTE: If you select Run Now for a recurring task, the task still runs at the next scheduled interval. |

Table 4. Individual Task options.

| Option | Description |
|-----------------------|---|
| Run Now with Override | If a task has run successfully, built-in gathering rules prevent a task from regathering information in the same (UTC) day. This option allows you to force a task to rerun and regather information when it has already completed successfully the same day. NOTE: In report packs, this option acts the same as the Run Now option. |
| New Window from Here | Opens a secondary window. This option is an MMC default. |
| Refresh | Allows you to refresh the console view. |
| Help | Opens the online help. The online help and the MMC online help are available from the same system, depending on the node selected in the treeview. |

Expanding Tasks in the Task Activity View

When you select a task in the treeview, it appears in the Task Summary view in the right pane. You can expand the task to view the task status and related information in the Task Activity view.

The following table describes the information available for the task activities.

Table 5. Task Activity View options.

| Information | Description |
|------------------|--|
| Description | This column describes the tasks. For gathering tasks that comprise many component tasks, the Description column lists each component task, as well as any other associated task activities. |
| Source | This column indicates the server against which the task is running. |
| Status | This column indicates whether the task is Pending, Active, Finished, Pending Retry, Unknown, or Failed. It also shows a status icon beside the Description. For information about the status icons, see Status Icons on page 22. |
| Progress | This column contains a progress percentage and an associated progress bar. The progress bar indicates the progress of the task, including all associated task activities. |
| Waiting For | This column indicates the gathering task that must be completed before this task can begin. For information about gathering task dependencies, see Gathering Task Dependencies on page 36. |
| Start Time | This column indicates the date and time when the task started. |
| Finish Time | This column indicates the date and time when the task finished. |
| Duration | This column indicates the length of time taken to complete the task. |
| Execution Server | This column indicates the server that ran the task. |

Cancelling Tasks

From the Task Activity view, you can also cancel Task activities.

To cancel a Task activity

- 1 Expand the task in the listview.
- 2 Right-click the task activity you want to cancel.
- 3 Click **Cancel**.
- 4 Verify that you want to cancel the Task.

If you cancel tasks, complete information is not stored in the database. If you cancel tasks that are dependencies for another task, the second task might not gather information as expected.

Reviewing and Saving Task Activity Logs

From the Task Activity view in the right pane, you can review the logs for active, pending, or completed tasks.

To view individual task logs

- 1 Expand the task in the listview in the right pane.
- 2 Right-click the task activity for which you want to view the log.
- 3 Click **View Log**.
- 4 Click events in the log and review the event descriptions at the bottom of the dialog box.
- 5 If you want to save the task log as a compressed file, click **Save Log File as As Zip** and select the location where you want to save the file.

For troubleshooting purposes, you might want to save multiple task log files to a compressed format so that you can send the files to a support person.

To save task logs for a task occurrence

- 1 Locate the task occurrence in the treeview (in the Historical or the Active folder).
- 2 Right-click the task occurrence for which you want to save the log files.
- 3 Click **Save Task Logs**.
- 4 Select the location to which you want to save the zipped file.

You can also save the task log file for a specific task activity by expanding the task in the listview, selecting a specific task activity, right-clicking and selecting Save Task Logs.

Status Icons

The Task Activity listview provides status icons as visual cues to the success or failure of the gatherings:

Table 6. Task activity status icons and their meaning.

| Icon | Description |
|---|---|
|  | This icon indicates that the task activity has not started yet. This icon is displayed when the status is Pending or Pending Retry. |
|  | This icon indicates that the task activity is currently active. |
|  | This icon indicates that the task activity has finished. |
|  | This icon indicates that the task completed with errors. |
|  | This icon indicates that the task activity failed. |
|  | This icon indicates that the task activity status is unknown. |

Database Management

- [About the MessageStats Database](#)
- [Managing your MessageStats Database](#)
- [Using Database Management](#)
- [Configuring an Aging Task](#)
- [Configuring an Aging Task](#)
- [Database Maintenance](#)
- [Deleting Notes Object Data](#)
- [Clearing the MessageStats Database](#)

About the MessageStats Database

The MessageStats Database stores the data that is used to render reports.

When you install the report pack, you provide the location of the database server. MessageStats stores that location and displays the location on the Database tab of the MessageStats Server Properties dialog box.

Supported Database Implementations

There are two database server implementations that you can use to store the collected data:

- For evaluation and test purposes, you can use SQL Server Express.Server
- For production use, use SQL Server 2012, SQL Server 2014, SQL Server 2016, or SQL Server 2017,

You can also employ a distributed database implementation.

Managing your MessageStats Database

The MessageStats Database stores the information that is used by the reports. When the database is properly tuned, information can be efficiently stored, and the reports can quickly access the required data. Over time, the database will grow, and the database server may become taxed. However, it is critical that the database retain enough data for any historical reporting needs that may arise.

Proper database management includes following the Microsoft best practices for backing up data and archiving historical data. To manage your database, you can use the Database Management functionality to selectively delete obsolete data and to tune the database for optimal performance.

Using Database Management

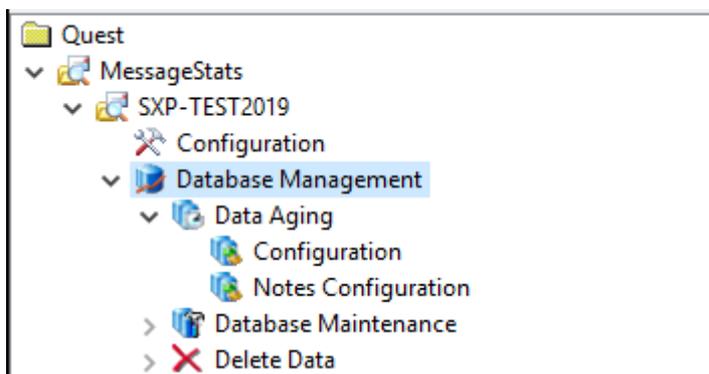
During the installation of the Notes report pack, additional tables are added to the MessageStats database in order to store Note-specific data. MessageStats allows you to manage the storage of Notes object data to prevent excessively rapid growth of the MessageStats database.

In MessageStats, database management functionality is extended to include database management functions specific to Notes data. Using Database Management, you can delete obsolete information and tune your database.

Before you modify your database, ensure that no consoles are currently writing information to the database. If you use Database Management while a console is writing to the database, you risk corrupting your database.

To access the Database Management tool

- Select **Database Management** from the treeview.



The Database Management tool provides the following functionality:

- Database Aging (For more information, see [Configuring an Aging Task](#) on page 24.)
- Database Maintenance (For more information, see [Database Maintenance](#) on page 25.)
- Deleting Data (For more information, see [Deleting Notes Object Data](#) on page 25.)

Configuring an Aging Task

You can use the Data Aging function to delete the historical data from your database. The Notes Configuration option under the Data Aging node allows you to define the aging task for Notes data.

To define a data aging task

- 1 Expand the **Database Management | Data Aging | Notes Configuration** nodes in the treeview.
- 2 Select **Delete aged data**.
- 3 Select **Age Statistics (days)** check box.
- 4 Enter the number of days you want to retain statistical data in your database.
- 5 Click **Configure Job**.
- 6 Select **Daily**, **Weekly**, or **Monthly** to indicate how often you want to delete the data older than your retention definitions.

Depending on the schedule type that you select, the bottom box changes to an appropriate interval selector.

- 7 Enter the **Start Date** and **Start Time** information.

- 8 Click to select the **Limit Job Execution Time** box if you want to limit the time duration for an aging job, and enter an end time.
- 9 Enter an appropriate recurrence interval:
 - Enter the number of days between jobs for Daily schedules.
 - Enter the day of the week for Weekly schedules.
 - Enter the day of the month for Monthly schedules.
- 10 Click **Deploy**.

Data Aging Job History

After you create a job, the interface changes to a three-tab format:

- The Schedule tab contains the same content as the Create Job tab had before a job was created.
- The Properties tab describes the properties associated with the aging job, and is updated as new information becomes available.
- The History tab contains a log of past aging jobs

Logging the Aging Progress

Because the aging process is performed by a service, progress is recorded in the log journal for all database management activities.

The log information is available in the MessageStats log journal, so activity can be viewed on the MessageStats Gathering reports by filtering the Source field by Stats Data Aging or Audit Data Aging values.

Database Maintenance

The Database Maintenance node of the navigation tree contains the functionality for reindexing the individual database tables and defragmenting a database.

The Reindex option completely reindexes each table in the database. The Defragment option simply defragments the indexes. If you run the Reindex option, you do not need to run the Defragment option since there is nothing to defragment if all the indexes are new.

Using these functions can aid in reducing the time it takes to read data from and write data to the database:

Table 1. Schedules for database maintenance.

Recommended alternatives for database maintenance

| | |
|-------------------------|--|
| Resource Intensive | Schedule the Reindex job to run every day after all the gathering tasks have completed. |
| Less Resource Intensive | Schedule the Defragment job to run every weekday (Monday through Friday) after all the gathering tasks have completed. Schedule the Reindex job to run on the weekend (or once a month) after all the gathering tasks have completed. |

Deleting Notes Object Data

This branch of the navigation tree provides the functions that delete object data and report data from the MessageStats database. You can use the Notes Object Data option to delete information about Notes server objects and any report data associated with the specified Notes server.

You can select objects including

- Domino domains
- Notes servers

If you delete a Domino domain, user report data is automatically deleted. If you delete a server, you have the option of deleting the user data or not.

To delete object data from the database

- 1 Expand the **Database Management | Deleting Data** nodes in the treeview.
- 2 Select the **Notes Object Data** node.
- 3 Select **Domains** and/or **Servers**.
- 4 Select the domains and/or the servers that you want to delete.
- 5 Click **Delete**.
- 6 Verify that you want to delete the object information.

i | **TIP:** If you delete all the Domino servers in a domain, remember to delete the Domino domain as well. Otherwise, the domain still appears in the treeview. Since you have deleted the server that contains the primary Domino Directory that is used to enumerate the domain, any tasks run against the domain will fail.

Clearing the MessageStats Database

The Clear Database function allows you to delete all the information in your database.

The Clear Database function cannot be reversed. If you may need any of the information you intend to delete, create a backup of the database.

The following information is removed from the MessageStats database:

- Processed tracking log information
- Processed Exchange object data
- Statistical information about your use of MessageStats (such as gathering status and last gathering)
- Region definitions
- Server properties information
- Default filter options

To delete all data from the MessageStats database

- 1 Expand the **Database Management | Deleting Data** nodes in the treeview.
- 2 Select the **Clear Database** node.
- 3 Click **Clear Database**.
- 4 Verify that you want to delete the data.

Setting Task Default Properties

- [Configuring Task Default Properties](#)
- [Specifying Notes Credentials](#)
- [Changing Task Credentials](#)
- [Changing the Schedule for a Task](#)
- [Enabling Task Logging](#)
- [Setting Task Retry Attempts](#)

Configuring Task Default Properties

If you right-click the Tasks node in the treeview and select Properties, you can view properties that are used as the default values for all tasks.

The following property sheets are available:

- Notes Credentials (For more information, see [Specifying Notes Credentials](#) on page 27.)
- Task Credentials (For more information, see [Changing Task Credentials](#) on page 28.)
- Task Schedule (For more information, see [Changing the Schedule for a Task](#) on page 28.)
- Task Logging (For more information, see [Enabling Task Logging](#) on page 28.)
- Task Retry (For more information see [Setting Task Retry Attempts](#) on page 29.)

Specifying Notes Credentials

To gather information for the reports, the task processors must access the databases on the Domino server. The server on which the task processors are installed is known as the task execution server.

The Notes User account that is used must have Designer-level access to the Domino server. To gather private folder information, the account must also have Trusted Server rights in the Domino Server Document of the server from which data is collected. For more information, see [Required Rights and Permissions](#) on page 10.

Using the Notes Credentials tab, you select the User ID file for the Notes User that is used by the Task Execution Server to run gathering tasks.

MessageStats relies on the Notes client to extract the user name from the Notes ID file and to verify the password for the ID file. If you are running the MessageStats console on a machine on which Notes is not installed, you can import the Notes ID file but "?????????" is displayed instead of the user name. The selected ID file and password can still be used by the Task Execution Server.

To specify the account used by the Task Execution Server

- 1 Select the **Tasks** node in the treeview.
- 2 Right-click and select **Properties**.
- 3 Select the **Notes Credentials** tab.

- 4 Click **Import ID File** and browse to the Notes User ID file you want.
- 5 Enter the password associated with the selected user ID file.

For Lotus Notes 7.0 and later, the password is validated when you click Apply. For Lotus Notes 6.0, the password is not validated until you run a gathering task against a Domino server.

- 6 Click **Apply**.
- 7 Click **OK**.

Changing Task Credentials

The Task Credentials property page allows you to set Windows security credentials under which the gathering process runs. By default, this page displays the credentials that you defined for the Task Scheduler Service during installation.

If you change the Task Execution Server, this page automatically displays the credentials that you identified for that server. Task credentials are not validated on this property page so ensure that you enter a valid account and password.

Notes security is separate from Windows security so if you change this setting, it does **not** affect the Notes gathering tasks.

Changing the Schedule for a Task

The Task Schedule property page allows you to schedule your gathering tasks. You can create two types of schedules:

- Schedules that run once (at a specific time such as December 31 or Now)
- Schedules that run consecutively at a defined period (such as daily, weekly, or monthly)

You can also run tasks immediately without changing the task schedule. From the Tasks Summary View, right-click a task and select Run Now.

Enabling Task Logging

MessageStats creates log entries during several processes. You can use the Task Logging page to set up logging at the task level.

Use the Task Logging page to configure the following:

Table 1. Task logging options.

| Option | Definition |
|--|---|
| Enable logging for the given Task Processor | Select this option to enable logging for this gathering task and you can identify the detail level of the task logs. |
| Log detail level | Set the level of detail that should be included in the log files. For information about the different levels of details, see About Logging Levels on page 28. |
| Record errors in the Windows Application Event Log | Select this option to also record errors in Windows Application Event logs. |

About Logging Levels

You can define the logging level for your task logs. The following log levels are available, from the most detailed to the least detailed:

Table 2. Logging level settings.

| Log Level | Detail |
|------------------|---|
| Trace | Trace level logging is extremely detailed logging that includes errors, warnings, and status messages, and also low-level event details. Trace logging is only used with custom components provided by Quest development for diagnostic purposes. This level of logging can generate large log file and can affect system performance. |
| Debug | Debug level logging includes errors, warnings, and status messages, and also low-level event details. Quest Support might ask you to set logging to the debug level to identify and resolve an issue. Use debug-level logging only at the request of Quest Support, since the log files can grow rapidly and can affect system performance. These logs contain very detailed entries. |
| Status | Status level logging includes warnings and errors, as well as the regular flow of major events. Use the Status level for a new installation to include more detailed logs. |
| Warning | Warning level logging includes errors that appear at the Errors level. The Warning level also includes errors that occurred but from which the task recovered and continued gathering. Use this level for established and stable implementations. |
| Errors | Errors level logging includes errors that caused a gathering task to terminate. |

It is recommended that you periodically remove obsolete logs.

Setting Task Retry Attempts

The Task Retry property page lets you specify the number of times you want to try to connect to a server to run a task. It also lets you specify the number of minutes between each connection attempt.

If MessageStats cannot access a server to perform a task, it will continue to attempt to run the task based on the retry parameters you specified

Table 3. Task Retry options.

| Option | Parameter |
|--|-------------------------------|
| Number of time to retry connection | Default value is three times. |
| Number of minutes between retry attempts | Default value is one minutes. |

Creating Gathering Tasks

- [About Tasks](#)
- [About the Create Task Wizard](#)
- [Selecting the Task Template](#)
- [Editing Tasks](#)
- [Gathering Task Dependencies](#)

About Tasks

The following sections explain how to create gathering tasks using the Create Task Wizard and explains how the Default Gathering for Notes task is used.

A task is a collection of gathering activities. When you create a task, it is listed in the Tasks node of the navigation tree. When you click the Tasks node, the task appears in the Tasks Summary View.

What is the Tasks Summary View?

The Tasks Summary View shows all the tasks created for the MessageStats Scheduler Server. The Tasks Summary view displays the properties of a task, including the task name, credentials, schedule, next occurrence, description, and progress.

What is a Task Occurrence?

Tasks are scheduled to run an occurrence of that task. Each occurrence has a start date and time. Each occurrence lists the activities and associated properties in the Task Activity view.

What is the Task Activity View?

The Task Activity view displays detailed properties of the activities that comprise an individual task. These properties include activity descriptions, source, status, progress, runtime gathering dependencies, start and finish time, activity duration, and execution server.

About the Create Task Wizard

You create tasks to collect data from a Domino database. The initial gathering task provides immediate information about your Domino environment.

An initial gathering involves creating a Default Gathering for Notes task. Typically you run the Default gathering at the domain level. This task is a composite task that initiates the following individual gatherings in the order of their defined dependencies:

- [Domino Server Enumeration](#)

- [Notes Users](#)
- [Notes Databases](#)
- [Notes Server Storage](#)

If you create a Default Gathering for Notes task at the server level, you must run the individual Notes Users gathering at the domain level.

For more information about gathering task dependencies, see [Gathering Task Dependencies](#) on page 36.

To optimize collection performance, you can create multiple tasks to collect different information on different schedules.

i | **TIP:** When scheduling the Default Gathering for Notes task (or the Notes Databases gathering task), it is recommended that you schedule the task to run after the Catalog task has run to update the Domino Domain catalog (CATALOG.NSF).

The following tasks can be run at the Domino domain level:

- [Domino Server Enumeration](#)
- [Notes Users](#)

The following tasks can be run at the Domino server level:

- [Notes Databases](#)
- [Notes Mailbox Content](#)
- [Notes Server Storage](#)

About the Create Task Wizard

The Create Task Wizard wizard consists of base pages and any additional pages that are specific to the type of gathering task you are creating. For example, to create and schedule a Default Gathering for Notes gathering task, you use the wizard pages to perform the following actions:

- [Selecting the Task Template](#)
- [Specifying Notes Credentials](#)
- [Specifying the Task Execution Server](#)
- [Scheduling the Task](#)
- [Enabling Task Logging](#)
- [Specifying Credentials for a Task](#)

When you create a Mailbox Content gathering, you also select the types of content that you want to gather:

- [Selecting the Mailbox Content Data](#)

To create a new task

- 1 Expand the **Notes | Domino Domains** nodes and select a domain or a server.
- 2 Right-click and select **Create Task**.
- 3 Select the template for the type of gathering that you want.
- 4 Complete the pages of the Create Task Wizard as required.

Selecting the Task Template

Use the Select Task Template page to select a gathering task template and to name the task. Ensure that the name is unique but reflects the purpose of the task.

For a description of all Notes gathering tasks and any task dependencies, see [Gathering Task Dependencies](#) on page 36.

Table 1. Notes Task Templates.

| Option | Definition |
|----------|--|
| Name | The name that you enter appears in the task list of the Tasks Summary View. To change the task name, right-click the name from the Tasks Summary node, select Properties , and edit the name. |
| Template | The Template box lists templates for all gathering tasks. The gathering task description is displayed under the Template box. The following task templates are available for Notes gatherings: Default Gathering for Notes Domino Server Enumeration Notes Databases Notes Users Notes Mailbox Content Notes Server Storage |

Specifying Notes Credentials

To gather information for the reports, the task processors must access the databases on the Domino server. The Notes User account that is used must have Designer-level access to the Domino server.

Using the Notes Credentials dialog, you select the User ID file for the Notes User that is used by the Task Execution Server to run gathering tasks.

MessageStats relies on the Notes client to extract the user name from the Notes ID file and to verify the password for the ID file. If you are running the MessageStats console on a machine on which Notes is not installed, you can import the Notes ID file but "?????????" is displayed instead of the user name. The selected ID file and password can still be used by the Task Execution Server.

To specify the Notes account used by the Task Execution Server

- 1 Click **Import ID File** and browse to the Notes User ID file you want.
- 2 Enter the password associated with the selected user ID file.
- 3 Re-enter the password to confirm.

For Lotus Notes 7.0 and later, the password is validated when you click Apply. For Lotus Notes 6.0, the password is not validated until you run a gathering task against a Domino server.

- 4 Click **Next**.

Selecting the Mailbox Content Data

The Notes Mailbox Content gathering task collects information about mail file content such as encrypted messages and messages that contain links and hotspots. You can also collect information about any shared folders and any private folders that exist in each mail file.

If you select a Notes Mailbox Content gathering template, you can select the type of content data that you want to collect. By collecting only the data that you want, you can manage server load and the gathering task performance.

Table 2. Mailbox Content options.

| Option | Definition |
|--------------------|--|
| Encrypted Messages | Select this option to gather information about mail files that contain encrypted messages. |
| Links and Hotspots | Select this option to gather information about mail files that contain messages with links to other databases. |
| Shared Folders | Select this option to gather information about the shared folders that are found in mail files. |
| Private Folders | Select this option to gather information about any private folders that are contained in each mail file. For information about the prerequisites for gathering private folder data, see Notes Mailbox Content on page 37. |

Specifying the Task Execution Server

Use the Task Execution Server page to specify which task execution server you want to use to run the task. If you installed the MessageStats Server through a custom or distributed installation, you had the option of installing additional task processors on separate servers.

On Task Execution Server page, you can identify the Task Execution Server that houses the task processors. If you have only one Execution Server available, the Server box is read-only.

Scheduling the Task

Use the Scheduling Tasks page to schedule gathering tasks. You can create two types of schedules:

- Schedules that run once (at a specific time such as December 31 or Now)
- Schedules that run regularly at a defined period (such as daily, weekly, or monthly).

Table 3. Task Schedule options.

| Option | Definition |
|---------------|--|
| Task Period | Select the time period for the scheduled task. The Now Task Period automatically appears as the default Task Period. |
| Start Time | Enter the start time for the scheduled task. |
| End Time | You do not need to set an End Time for the schedule. If you want to set an end time, click the check box to select it. |
| Start Date | Select a start date for the scheduled task. |

The following table describes the other available Task Periods:

Table 4. Scheduling a recurrent task.

| Period | Description |
|---------|---|
| Daily | <p>You can set a daily recurrence for the task. By default, the Daily Task Period is configured to perform the gathering task every day. You can change the interval to every two days or at any other appropriate daily period.</p> <p>To set a Daily Task Period</p> <ol style="list-style-type: none"> 1 Select the Start Time and End Time (if applicable). 2 Enter the interval in days. 3 Enter or select a Start Date (if applicable). |
| Weekly | <p>You can set intervals by days of the week. Using the Weekly period, you can set the following types of schedules: gather every second Tuesday; or gather every Monday, Wednesday, and Friday; or any other combination.</p> <p>To set a Weekly Task Period</p> <ol style="list-style-type: none"> 1 Select the Start Time and End Time (if applicable.) 2 Enter the frequency in weeks you want to use for this task. 3 Click to select or clear the days of the week. 4 Enter or select a Start Date. |
| Monthly | <p>You can set intervals by the days and weeks of the month. Using the Monthly period, you can set the following types of schedules: gather on the first day of each month; gather on the last Friday of March, June, September, and December (each quarter); gather on the fifteenth day of every other month; or any other combination.</p> <p>To set a Monthly Task Period</p> <ol style="list-style-type: none"> 1 Select the Start Time and End Time (if applicable). 2 Enter the day of the month when want to schedule the gathering - OR - Select the week (First, Second, Third, Fourth, or Last), and the day of the week. 3 Click to select or clear the months of the year. 4 Enter a Start Date. |

Enabling Task Logging

Log entries are created during several processes. If you contact Quest Support for assistance, Support might request that you change your logging detail level to help troubleshoot technical issues.

You can use the Task Logging page to set logging at the task level. For more information about task logging, see [Enabling Task Logging](#) on page 28.

Specifying Credentials for a Task

Using the Task Credential page, you set the Windows security credentials for the task. By default, this page displays the credentials that you defined for the Task Scheduler Service during installation. Credentials are not verified in this wizard.

In the MessageStats Notes report pack, task credentials are used only for running and scheduling the task. The account that is used to access the Domino data is the Notes ID file that you specified as the Notes credentials.

Ensure that you enter a valid account and password or the gathering tasks will fail. If you changed the Task Execution Server, this page automatically displays the credentials that you specified for that server.

Table 5. Entering the task credentials.

| Option | Definition |
|------------------|---|
| Account | Enter the Windows account under which the task will run. The account must have sufficient permissions to run the task on the specified servers. |
| Password | Enter the password for the account. |
| Confirm Password | Enter the password again to confirm it. |

Editing Tasks

You can edit tasks in the following ways:

- By adding more Exchange sources to an existing task
- By changing the properties of an existing task

To add more Exchange sources to an existing task

- 1 Expand the navigation tree and browse to the Domino object that you want to add.
- 2 Right-click and select **Add to Task**, and then select the task from the list and click **OK**.

To change the property of an existing task

- 1 Select the task from the Tasks Summary View.
- 2 Right-click and select **Properties**.
- 3 Step through the wizard and change the properties as required.

Gathering Task Dependencies

Certain gathering tasks must be completed before other tasks can start. Also some gathering tasks are run at a domain level and others can only be run at the server level. To access the task template, you select a domain or a server, right-click and select **Create Task**.

The following table lists dependencies for the Notes gathering tasks:

Table 6. Notes gathering task dependencies.

| Gathering Task Name | Part of default? | Description | Dependent on |
|-----------------------------|------------------|--|---|
| Default Gathering for Notes | n/a | A composite task that includes the following gathering tasks: <ul style="list-style-type: none">• Domino Server Enumeration• Notes Users• Notes Databases• Notes Server Storage | The dependencies for the individual tasks that comprise the Default Gathering for Notes task are described later in this table. |
| Domino Server Enumeration | Yes | Searches the Domino Directory for Domino servers that belong to the selected domain. The task retrieves server configuration properties and stores them in the MessageStats database. | No dependencies. Is run automatically when you connect to the Domino domain. |

Table 6. Notes gathering task dependencies.

| Gathering Task Name | Part of default? | Description | Dependent on |
|-----------------------|------------------|--|---|
| Notes Users | Yes | Collects the user information from a primary Domino Directory for a domain. The collected information includes user details such as display name, department, the user mail server, roaming server, and internet address. | No dependencies. |
| Notes Databases | Yes | Searches a Domino server catalog for all mail database files on the server. Collects basic statistics such as database size and number of documents. In addition, the task attempts to open each database file to retrieve additional information such as the mail file security, space used, and mailbox owner. Prerequisites The task can gather additional statistics from the database files only if the Notes user credentials used to run the task have at least Designer-level access. | No dependencies. When you schedule the Notes Databases gathering task, it is recommended that you schedule the task to run after the Catalog task has run to update the Domino Domain catalog (CATALOG.NSF). |
| Notes Mailbox Content | No | Collects information about mail files that contain encrypted messages, links to other databases, shared folders, and private folders. You can select the type of data that you want to gather. Prerequisites The Notes user credentials used to run the task must have at least Designer-level access to the database files. To collect private folder data, the Notes user credentials must be on the Trusted Servers list in the Domino Server Document of the server from which data is collected. For more information, see Required Rights and Permissions on page 10. | Successful completion of the following tasks: Notes Databases gathering Notes Users gathering |
| Notes Server Storage | Yes | Collects the disk space information for the Domino servers, including space used and space available. | Successful completion of the Notes Databases gathering. |

Using the Reports Console

- [Introducing the Reports](#)
- [Using the Reports Console](#)
- [Using the Toolbar Buttons](#)
- [Browsing Reports](#)
- [Creating Custom Reports](#)
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Introducing the Reports

MessageStats provides a collection of configured reports that allow report consumers to view data across multiple levels of an organization. You can change report parameters using Quick Filters.

This guide provides information about how to use the reports, and describes the standard Notes reports that are available. It explains how to create custom reports and graphs, how to export reports and graphs, and how to set up automatic subscriptions to post reports or email them on a regular schedule.

The following features are included in reports:

- The Web Report Wizard that allows you to configure and generate reports, and provides report parts that you can add to and arrange on reports.
- The Graph Wizard allows you to create custom graphs from the data sources that you select.
- Predefined role-based security settings allow you to control who can view reports and create custom reports.
- A subscription service allows you to deliver reports through email, web sites, file shares, or ftp (file transfer protocol) site.
- Tooltips that display when you hover over column headings or over items in graphs can reveal detailed information.

Using the console, you can perform the following tasks:

- Group, insert, append, remove, and sort fields on reports. Quick Filters allow you to change report parameters quickly and easily to focus your report.
- Display report data in bar graphs, line graphs, and pie charts.
- Export or email entire reports in Microsoft Excel, text (as either comma-separated values or tab-separated values), XML, as a Word file, in HTML, or MHTML.
- Select portions of reports, such as columns or rows, and export the selections or send by email. You can also select a graph or chart to export it or send it by email.

To access the reports

- Select **Start | Programs | Quest | MessageStats | Quest MessageStats Reports**.
 - OR -
 - Click the **MessageStats Reports** node in the treeview of the console.
 - OR -
 - Open the reports web site using Internet Explorer.

Types of Reports

MessageStats Reports hosts two types of reports: stock reports and custom reports.

Stock Reports

Stock reports are delivered with the product. For information about stock reports, see [Introducing the Notes Reports](#) on page 57.

Subscriptions allow you to generate reports on a regular schedule. You can set up email notifications that either link to the reports or include attachments that contain actual report data. For information, see [Configuring Report Subscriptions](#) on page 53.

Custom Reports

You can create custom reports using the Web Report Wizard. You can build your own reports based on existing data sources. You can select fields, filters, format, grouping, and sorting options. Custom reports can be edited, depending on your security permissions. For information about the Web Report Wizard, see [Creating Custom Reports](#) on page 47.

Report Graphs

MessageStats provides graphing capabilities with many of the available reports. Where graphs are available, the number of servers and the date periods you select result in the following graphing model:

Table 1. Types of graphs provided with reports.

| Desired Content | Graph Parameters | Result |
|--|-------------------|------------|
| Information within one server. | 1 server, 1 day | Pie graph |
| Comparison between two or more servers. | N servers, 1 day | Bar graph |
| Trends for one server over two or more days. | 1 server, N days | Line graph |
| Trend comparing two or more servers over two or more days. | N servers, N days | Line Graph |

Report Fields

Each report provides field descriptions in the tooltips text for the report columns. You can also view field descriptions in the Information page for that report. For details about the Information page, see [Viewing Report Information](#) on page 46.

Using the Reports Console

The reports console allows you to browse the existing reports and navigate to the reports you need. Use the File menu commands to create new reports or save report settings, and view report settings for a particular report.

You can also export data from reports into a specified format or you can send a report by email using File menu commands.

Using the Toolbar Buttons

The following table describes the toolbar buttons at the top of the reports home page. Different buttons are available depending on your location within the reports tree.

Table 2. Reports Toolbar Functions.

| Icon | Function |
|---|--|
|  | Returns you to the reports home page. |
|  | Allows you to go up one level in the report structure. |
|  | Accesses the file menu, which includes the following options: New Custom Report, New Folder, Save, Save As, Save Report Settings, Send to, Export, Subscriptions, and Set Filter Defaults. |
|  | Opens the Web Report Wizard so you can edit a custom report. |
|  | Opens the Printer dialog box to allow you to print the report that you are viewing. |
|  | Shows you a preview of the printed report. |
|  | Closes the preview window. |
|  | Shows the Help for the reporting component. |

File Menu Commands

Different commands are available on the File menu depending on what you are displaying within the reports.

The options available on the File menu are limited to certain Web Reports security roles. For information, see [Setting Security](#) on page 52.

If you click **File** , the following menu options are available:

Table 3. File menu options.

| Option | Description |
|----------------------|--|
| New Custom Report | Opens the Web Report Wizard to allow you to create the new report. For information, see Creating Custom Reports on page 47. |
| New Folder | Opens the New Folder dialog box. When you name the new folder, the application places the folder as a subfolder of the currently selected folder. If you want to add a folder to the main navigation tree, the Home node should be selected before you create the new folder. |
| Save | Saves the changes, such as new sorting criteria, that you have made to an existing report. If you save reports to a node other than the My Reports node, the reports appear in alphabetical order under the pre-configured reports. |
| Save As | Saves the changes you have made to an existing report, but gives you the option to change the report name or location. If you save reports to a node other than the My Reports node, the reports appear in alphabetical order under the pre-configured reports. |
| Save Report Settings | Allows you to save the current report settings, including filters, and create a shortcut for the selected report. For more information, see Using Save Report Settings on page 51. |
| Send to | Allows you to send the currently displayed report by email to the address that you specify. You can specify the format. NOTE: You can also select rows or columns within a report, right-click and use the Send Selection option to email portions of a report. Also you can click on a graph or chart, right-click and use the Send Selection option to email the graph or chart. |
| Export | Allows you to export the report content into one of the following formats: <ul style="list-style-type: none"> • Microsoft Excel • Text (as comma separated values) • Text (as tab separated values) • XML • Word File • HTML • MHTML <p>You can also drag to select specific rows or columns and export only the selected portions. For more information about exporting reports, see Exporting Reports on page 43.</p> |
| Subscriptions | Opens the Subscriptions Page. For more information, see Configuring Report Subscriptions on page 53. |
| Set Filter Defaults | Opens the Configure Filter Defaults dialog box. You can set the default operator and values for a particular parameter in all reports that have a filter on that parameter. |

Sending Reports by Email

You can use the Send to function on the File menu to send an entire report by email.

You can also select portions of a report and send only the selected columns or rows as an attachment or embedded in the email. You can also send a selected chart or graph.

To email selected portions of a report

- 1 Click and drag to select the rows or columns in the displayed report.

- 2 Right-click and select **Send Selection To**.
- 3 Select the format you want.
- 4 Enter the email address in the **To** field and enter any text in the **Subject** and **Message** sections.
- 5 Click **OK**.

You can click to select a chart or graph and right-click to use the Send Selection option to email the selection as a bitmap attachment or as an embedded bitmap in an email. If you select a format such as Excel or text, the raw data used to create the graph is sent.

Exporting Reports

Exporting reports allows you to save reports to a format which can serve several purposes:

- You can further analyze the data in a third party application, such as Microsoft Excel.
- You can share information with users who need the data in different formats for presentation, such as HTML or Microsoft Word.
- You can use the exported data as input data into other applications, such as SAP.

The export functionality allows you to do one-time report exports. If you want to schedule the successive creation of exported reports, use the Subscription functionality. For more information, see [Configuring Report Subscriptions](#) on page 53.

In addition to exporting an entire report using the Export function on the File menu, you can also export selected portions of a report.

To export selected portions of a report

- 1 Click and drag to select the rows or columns in the displayed report.
- 2 Right-click and select **Export Selection**.
- 3 Select the format you want.
- 4 Navigate to the location where you want to save the file, enter a name in the File Name field, and click **Save**.

You can click to select a chart or graph and right-click to use the Export option to export the graph. If you select a format such as Excel or text, the raw data used to create the graph is exported.

Setting Filter Defaults

Use the Set Filter Defaults functionality to set the default operator and values for Date, Organization, and Site/Administrative group filters.

The values that you set appears on all reports that have Date, Organization, or Site/Administrative Group filter options.

The following table describes the options on the Set Filter Defaults page

Table 4. Report filter defaults

| Option | Description |
|----------------------|--|
| Date | The Date option allows you to set a default date for all reports that contain a Date filter. NOTE: It is recommended that you do not set absolute dates. |
| Organization | The Organization option allows you to set the default Exchange organization for all reports that contain an Organization filter. |
| Administrative Group | The Administrative Group option allows you to set the default Administrative Group for all reports that contain an Administrative group. |

To set filter defaults

- 1 Select the MessageStats Reports node.
- 2 Select **File | Set Filter Defaults**.
- 3 Set the filter and parameter from the options.
- 4 Click **OK** to apply the defaults.

The filter defaults appear in the filters page for all reports. Default filters do not apply to saved Custom Reports.

Browsing Reports

There are several ways to navigate and access the reports:

- Toolbar buttons provide navigation functionality, as well as edit and preview custom reports, access the File menu, and print the current report. For information, see [Using the Toolbar Buttons](#) on page 41.
- Treeview is used to navigate through report branches. For information, see [Using the Treeview](#) on page 44.
- Listview displays a description of all the reports within a folder. For information, see [Using the Listview](#) on page 44.
- Linked reports allow you to drill down from summary report into a detailed report based on a link on a data result.
- Parts are standard report components containing text-based information and graphs that you can include in certain reports. For information, see [Configuring Report Parts](#) on page 45.
- The Information button allows you to view the groupings, filters, and field descriptions for your selected report. For information, see [Viewing Report Information](#) on page 46.

Using the Treeview

MessageStats Reports use a treeview as the main navigational tool. The treeview contains folders that expand to reveal subfolders and reports.

When you select a folder from the treeview, the contents of the folder are displayed in the right pane in a file-based format. You can also select a report directly from the treeview.

The illustration to the left is an example of what the treeview may look like. Folders indicate a grouping of report information. Folders may contain subfolders or reports.

When you click on a report, the contents appear in the right pane.

Depending on your security role, you may not be able to see some of the branches of the treeview.

Using the Listview

MessageStats Reports use a listview model to display the available reports. When you select a folder from the treeview, the contents of the folder are displayed in the right pane in a file-based format.

| Name | Last Modified | Author | |
|---|---------------|--------|----------------------|
|  Mailbox Sizes This report shows the largest mailboxes in your organization and their associated sizes. For Exchange 2010 and later, you can include the size of archive mailboxes in the size totals. This report is populated by the Exchange Mailboxes gathering task. The server-specific filters (such as Server/DAG, Server Store Distinguished Name, or Server Roles) apply to the primary mailboxes only. NOTE: You can right-click on a heading and use the Insert Field option to add more information to the report. | 2/27/2017 | Quest | Edit |
|  Mailbox Quotas This report shows the quotas that are set for the largest mailboxes across your Exchange organization. The report is populated by the Exchange Mailboxes gathering task. For Exchange 2010 and later, information is also available about archive mailbox quotas. The server-specific filters (such as Server/DAG, Server Store Distinguished Name, or Server Roles) apply to the primary mailboxes only. NOTE: You can right-click on a heading and use the Insert Field to add more information to the report. | 2/27/2017 | Quest | Edit |
|  Archive Mailbox Sizes For Exchange 2010 and later, this report shows the largest archive mailboxes in your organization and their associated sizes. This report is populated by the Exchange Mailboxes gathering task. NOTE: You can right-click on a heading and use the Insert Field option to add more information to the report. | 2/27/2017 | Quest | Edit |
| 3 reports, 0 folders. | | | |

The following table describes the interface elements of the file-based format:

Table 5. Information on the file-based report listing.

| Element | Description |
|-----------------------|--|
| Folder Icon | Reveals the subfolders and files contained within the folder. |
| Report Icon | Displays the report in the right pane. |
| Name | Displays the title of the report. The title is also a hyperlink that you can click to display the report in the right pane. |
| Last Modified | Displays the date stamp of the last time the report was modified. |
| Author | Displays the name of the report author. For reports that are supplied with the application, the Author is blank. For Custom reports that you create, the report author is displayed. |
| Report Description | Displays a description of the report, if applicable. |
| n reports, n folders. | Indicates the number of reports and subfolders in the main folder. |
| Edit | Displays the Edit menu. For information, see Editing Reports on page 48. |

Configuring Report Parts

Parts are report components that contain either text-based tabular information or graphs that can be included in certain reports. You can select the parts you want to include in a report, and the order in which they appear in the report.

To configure report parts

- 1 Select the My Reports node in the treeview, and click **Configure Parts**.
- 2 Select the report parts you want in the Part Library pane and click **Add**.

When you select a report part, the part definition is displayed below the Part Library pane. The parts you add are displayed in the Configured Part pane. You can rearrange the parts in the Configured Parts pane by selecting a part and clicking the Up or Down button.

- 3 Select a part in the Configured Parts pane and click **Configure** to select the settings for each part.

If you select the Show Part Header option, all parts are separated by a blue header line containing the Part name and description.

- 4 Enter the settings for the part and click **OK**.
- 5 Click **OK** to generate your report.

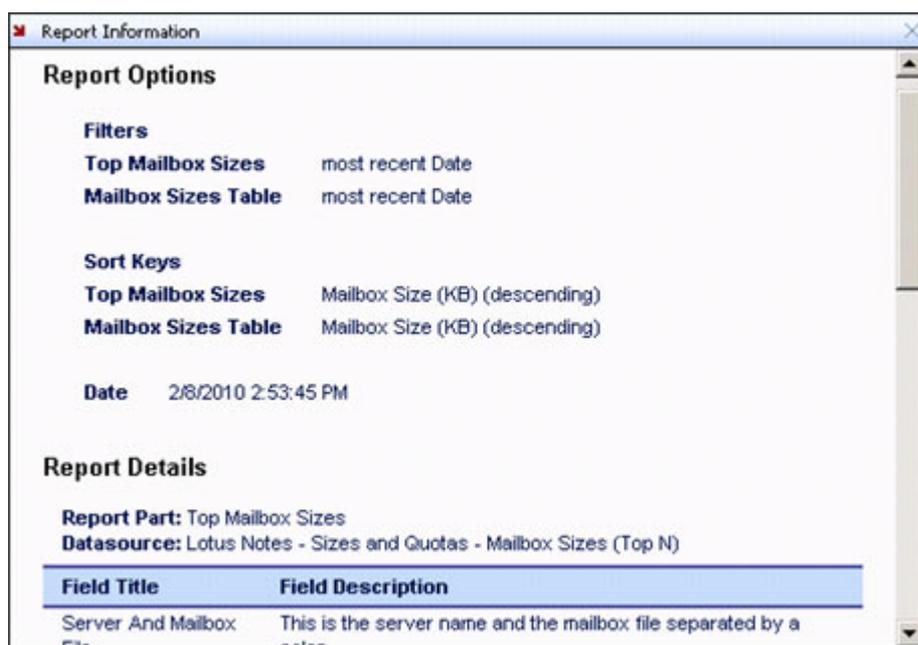
To remove report parts

- 1 Select the My Reports node from the treeview, and click **Configure Parts**.
- 2 Select the report part in the Configured Parts pane and click **Remove**.
- 3 Click **OK** to generate your report.

Viewing Report Information

Located at the lower-right of each report, there is an Information  button that you can use to view the report options and notes for a selected report.

The following illustration shows an example of report information:



The following information is available:

- **Report Options** include default filters and sort keys, as well as any quick filters and sort keys you selected using the Quick Filter options.
- **Report Details** include a list of the report parts (tables and graphs) that comprise the report. This section also shows a list of the data sources and all the fields (and the field descriptions) that are used.

By determining the parts and data sources that comprise a standard report, you can use the information to create custom reports or custom graphs that show similar information, but with changes or additions to meet your own needs.

Creating Custom Reports

You can create new custom reports to supplement the existing reports using the Web Reports Wizard. You must be a Report Author or higher to create new reports. For more information, see [Setting Security](#) on page 52.

The Web Report Wizard consists of several pages. You do not have to access the pages in order. To access a specific page, select it on the list of pages on the left side of the Web Report Wizard

To access the Web Report Wizard

- Select **File | New | Custom Report**.

- OR -

Right-click in the treeview and select **New Custom Report**.

For more information about creating custom reports, see the *MessageStats Reports User Guide*.

Creating Custom Graphs

You can use the Graph Wizard to create custom graphs to supplement the graphs and charts available in the existing reports.

The Graph Wizard allows you to create bar charts and stacked bar charts, pie charts, XY graphs, and XY stacked area graphs. You select the data source and choose the fields that are used for the statistical data values, the category labels, and the series labels.

Bar Charts

Bar charts are useful for comparing data. They are also used to compare values across categories or to compare the contribution of each value to a total across categories (for example, stacked bars).

Pie Charts

Pie charts are useful for viewing proportions or percentages. They visually represent the contribution of each value to a total sum of data, or the component parts of a whole. A pie chart is used to show how a part of something relates to the whole.

XY or Line Graphs

A line graph is used to show continuing data; how one thing is affected by another. This kind of graph is used to show the effect of an independent variable on a dependent variable. Line graphs are useful for determining trends.

Determining Which Data Sources You Want

If you are creating a graph that is similar to a graph in one of the standard reports, you can view the data sources for the standard report and incorporate them into your custom graph.

To view the data sources in a standard report

- Display the report and click the Information button  in the bottom right corner.

To access the Graph Wizard

- Select **File | New | Custom Graph**.

- OR -

Right-click in the treeview and select **New Custom Graph**.

For more information about creating custom graphs, see the *MessageStats Reports User Guide*.

Editing Reports

You can modify both the configured reports and any custom reports that you create using edit and grouping functionality.

You can edit reports in the following ways:

- Using the Edit button on the report listview
- Selecting filters before rendering a report
- Using the Quick Filter Bar at the bottom of the report
- Using Save Report Settings to retain the filters, sort and grouping options, and any other modifications that you have made to a report, to facilitate the creation of subsequent reports with the same settings.
- Using the column headers on the reports to change grouping and sorting options
- Using the Edit menu on the toolbar to launch the Reports Wizard

The following table describes the extent of editing for each type:

Table 6. Functions used to modify reports.

| Type | Description |
|------------------|---|
| Edit Button | Allows you to copy the report to a different destination folder, move the report to a different location, rename or delete the report, or edit the report description. |
| Filters | Allows you to restrict the report content to specific information before the report is rendered. |
| Quick Filter Bar | Allows you to change filter options and regenerate the report. For more information, see Using Quick Filters on page 50. |
| Column Header | Allows you to add or remove fields in the report, and change group and sort options. For more information, see Changing Grouping Options on page 51. |
| Edit Menu | Opens the Web Report Wizard to allow you to customize or modify an existing report. |

Using the Edit Button

An Edit button is located at the right side of each folder and report in the file-based model. The commands available on the Edit button differ depending on whether the Edit button is accessed from a folder or a report.

For folders, the following commands are available:

Table 7. Folder level edit options.

| Command | Description |
|------------------|--|
| Copy To | Opens a dialog box for you to define the destination of the copied folder. |
| Move To | Opens a dialog box for you to define the destination of the moved folder. After the report is moved to the new location, the original is deleted. |
| Rename | Opens a dialog box for you to rename the selected folder. |
| Delete | Prompts you to verify that you want to delete the folder. |
| Edit Description | Opens a dialog box for you to edit the description of the folder. |

For reports, the following commands are available:

Table 8. Report level edit options.

| Command | Description |
|----------------|---|
| Copy To | Opens a dialog box for you to define the destination of the copied report. |
| Move To | Opens a dialog box for you to define the destination of the moved report. After the report is moved to the new location, the original is deleted. |
| Rename | Opens a dialog box for you to rename the selected report. |
| Delete | Prompts you to verify that you want to delete the report. |
| Modify Report | Opens the Web Report Wizard to allow you to make any changes to the selected report, and save your custom report. |

Selecting Report Filters

When you select the report you want to view from the treeview, you can select filters before MessageStats renders the report. After the report is rendered, there are two ways to change the filter options:

- Select the **Show Filters** bar at the beginning of the report to change multiple filters.
- Use the Quick Filter bar at the bottom of the report to further select specific data within the resulting dataset.

If you want to save a report query with specific filters applied, select the Save Report Settings option.

To select filters for a report

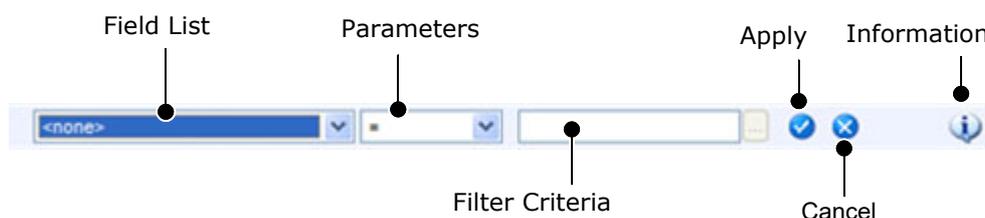
- 1 Open the report you want to view.
- 2 Define a period for the report (if applicable).
- 3 Identify operands and criteria for the filters you want to use.
- OR -
Leave the default filter values.
- 4 Click **Apply Filters**.

To change filter settings

- 1 Click **Show Filters** at the beginning of the rendered report.
- 2 Delete the criteria from a filter option to remove the filter.
- OR -
Identify other operands and criteria for new filters you want to use.
- 3 Click **Apply Filters**.

Using Quick Filters

Each report can have a Quick Filter bar at the bottom of the page. This bar does not scroll with the report.



To use Quick Filters

- 1 Select a field from the list.
- 2 Select a parameter from the following list:

Table 9. Quick filter parameters.

| Parameter | Available IN | Description |
|-------------|----------------|--|
| = | All | The field value equals the criteria value. |
| <> | All | The field value is not equal to the criteria value. |
| > | All | The field value is greater than the criteria value. |
| < | All | The field value is less than the criteria value. |
| <= | All | The field value is less than or equal to the criteria value. |
| >= | All | The field value is greater than or equal to the criteria value. |
| like | All | The field value is like the criteria value. |
| is NULL | All | There is no value for the criteria field. |
| is not NULL | All | There is any value except NULL for the criteria value. |
| between | All | The field value falls between the two criteria that you define. |
| is in | All | The field value is in the criteria that you define. NOTE: When using the is in operator, you can multi-select in the Select a Value dialog box by holding down the CTRL key and clicking the items you want. The selected items appear in the edit box as a list separated by semi-colons. |
| not in | All | The field value is not in the criteria that you define. |
| last | Date, DateTime | This operator allows you to select a time interval in the form nn uu, where nn is a number and uu is a unit of time. (For example, Last 5 Weeks, Last 3 days, and so on). The time interval is based on the current time. |
| most recent | Date, DateTime | This operator queries the database for the most recent entry for the specified field and then uses that value to find all records with a matching value. The value depends on the content of the database and is independent of the current time. "Most recent" could potentially mean a time long past, and remain unchanged until the database is changed. |
| today | Date, DateTime | Today = from 12:00 AM to the current time. |
| yesterday | Date, DateTime | Yesterday = from 12:00 AM to 11:59 PM yesterday. |
| this week | Date, DateTime | Start = Sunday of current week, End = today. |
| last week | Date, DateTime | Start = Sunday of previous week, End = Saturday of previous week. |
| this month | Date, DateTime | Start = 1st day of current month, End = today. |

Table 9. Quick filter parameters.

| Parameter | Available IN | Description |
|--|----------------|--|
| last month | Date, DateTime | Start = 1st day of previous month, End = last day of previous month. |
| this quarter | Date, DateTime | Start = 1st day of current quarter, End = today. |
| last quarter | Date, DateTime | Start = 1st of previous quarter, End = last day of previous quarter. |
| NOTE: Quarters start January 1, April 1, July 1, and October 1. | | |
| year to date | Date, DateTime | This operator selects records with dates from January 1 of the current year to the current date. |
| contains | Description | The field value contains the specified criteria. |
| does not contain | Description | The field value does not contain the specified criteria. |
| starts with | Description | The field value starts with the specified criteria. |
| ends with | Description | The field value ends with the specified criteria. |
| does not start with | Description | The field value does not start with the specified criteria. |
| does not end with | Description | The field value does not end with the specified criteria. |

When using the DateTime filters, time is based on UTC, not local time.

- 3 Define the filter criteria.

- OR -

Define both criteria if you have selected Between as your report parameter.

- 4 Click  .

Using Save Report Settings

Use Save Report Settings to retain the filter settings, sort and grouping options, and any other modifications that you have made to a report. You can then easily create subsequent reports with similar settings.

You can use the Set Filter Defaults to specify default filter parameters that apply to all reports. You can then modify a report to more closely meet your specific needs by setting additional filters, adding or removing report fields, and changing filter or grouping options.

When you have finished modifying a report, you can use the Save Report Settings option to save the report settings. Each time you run the report, the query uses the settings that you have identified for that report.

Changing Grouping Options

After a report is generated, you can change the grouping options for the report. Each column header provides the facility to change grouping options.

The following illustration shows the grouping options that might appear when you click the column header. The options that appear depend on the current settings.



Initially, the same options appear regardless of which column header you select. After you change the grouping options, the list changes to reflect your current settings.

The following table describes all the grouping options:

Table 10. Options for grouping data in a report.

| Option | Description |
|-----------------|--|
| Group By | Groups the report by the selected field. |
| Ungroup | Removes the grouping of the report by the selected field. |
| Insert Field | Adds a new field to the left of the selected field. When you select this option, a scrolling list appears for you to select the new field. |
| Append Field | Adds a new field to the right of the selected field. When you select this option, a scrolling list appears for you to select the new field. |
| Remove Field | Removes the selected field from the report. |
| Sort Ascending | Sorts the field in ascending order. |
| Sort Descending | Sorts the fields in descending order. |
| Remove Sorting | Removes the sorting that you have indicated from the report. |

Grouping changes you make to the sorting options for column headers are automatically reflected in the Report Information dialog box.

Setting Security

MessageStats Reports include a flexible solution for report security which allows you to assign certain permissions to users, and enable different views of the reporting tree depending on user needs and security requirements.

Two types of security are supported:

- Role-based security which is inherent in the reports. For more information, see [Role-based Security](#) on page 52.
- File-based permissions security which requires NTFS manipulation of your network. For more information, see [Configuring Report Subscriptions](#) on page 53.

Role-based Security

Role-based security provides an initial layer of security for your reports. Three local security groups, each with specific permissions, are created when MessageStats Reports are installed:

- Web Report Administrators
- Web Report Authors
- Web Report Users

The effect of role-based security is uniform for all reports. All three security groups have access to the report site and to all reports. The roles (Administrator, Author, User) provide different permissions that can restrict the ways reports can be manipulated.

The default membership to these security groups places administrators in the Web Report Administrator role, and all others in both the Web Report Authors and Web Report Users roles.

To customize the memberships, you can add or remove users from the default groups. For more information about the MessageStats Reports security groups, see the *MessageStats Reports User Guide*.

Configuring Report Subscriptions

The subscription service generates specific reports on a regular schedule. You can define subscriptions that embed a link to a report location in an email message, that embed the report in an email, or that send a message with an attachment that contains the report. You can also publish the reports to a file share, to an FTP site, or to a web site.

You can use the Subscription Wizard to set up and schedule the report subscription service.

Prerequisites for Publishing Reports to a Web Site

Web-based Distributed Authoring and Versioning (WebDAV) must be enabled on the IIS server if you are publishing a subscription to a web site. Also, both read and write permissions must be set on the virtual directory for the subscription.

Next, verify that the correct permissions are set on the target virtual directory. Select the Virtual Directory tab on the Properties sheet for the virtual directory. Ensure the following options are selected:

- Read
- Write
- Log visits

Finally, configure the NTFS permissions for the content folder on your web server to ensure that the user account that is used to create the subscription has adequate permissions. Open Windows Explorer, open the Properties sheet for your content directory, and select the Security tab.

In addition to write permissions, the user account must also have the following permissions:

- Create Files/ Write Data
- Create Folders/ Append Data

Creating and Changing Report Subscriptions

Use the Subscription Wizard to set up and schedule the report subscriptions.

To access the Subscriptions page

- In the folder view, select **File | Subscriptions**.
This opens the Subscriptions page.

From the Subscriptions page you can do the following:

- Click **Add** to access the Subscription Wizard.
- Click **Modify** to modify an existing subscription.
- Click **Remove** to delete a subscription from your subscription list.
- Click **Run Now** to run a subscription earlier than its scheduled time.
- Click **Refresh** to refresh the list of displayed subscriptions.

The Show subscriptions for all users check box is available only to administrators. To access the Configuration dialog box using the Configuration button, you must have administrator privileges and be the administrator of the computer where the reports web site is installed.

To initiate a new report subscription

- 1 On the Subscriptions page, click **Add**.

This opens the Subscription Wizard Welcome page. From this page, you can configure the report subscription service.

- 2 Click **Next** to access the Schedule page.

Scheduling the Subscription Service

You can schedule the interval, start date, and exact time at which you want the subscription to run.

Subscriptions can be run on the following intervals: Now, Once Only, Daily, Weekly, Monthly, and Quarterly.

If you select Daily, you have the option to specify whether you want the subscription to run every day, weekdays, or every specified number of days. If you select Weekly, you can specify the days of the week you want the subscription to run, and the number of weeks apart. If you select Monthly, you can specify which months, and which date during the month.

To schedule the subscription

- 1 Select the interval.
- 2 Enter the time of day you want the subscription to run in the Start Time box.
- 3 Enter the date you want the subscription to start in the Start Date box.
- 4 Click **Next**.

Sending the Subscription

You can specify the method for sending the subscription on the Action page of the Subscription Wizard. Reports can be sent by email, or copied to a file location, an FTP site, or a web site.

To send a subscription by email

- 1 Select **Email** in the Send to box.
- 2 Select the format in the Format box.
You can specify Inline HTML, HTTP Link, MHTML Attachment, Excel Attachment, Word Attachment, CSV Attachment, CSV Inline, TSV Attachment, TSV Inline, or XML Attachment.
- 3 Enter the recipients' email addresses in the To: line.
You may also specify other recipients in the CC: and BCC: lines.
- 4 Enter a subject for the Subject line.
- 5 Click **Next**.

When sending a subscription by email, the SMTP From address cannot contain spaces.

To send a subscription to a file location

- 1 Select **File Location** in the Send to box.
- 2 Select the format in the Format box.
You can specify HTML, MHTML, Excel, Word, CSV, TSV, or XML.
- 3 Enter the UNC File Path for the file location.
You may also choose to overwrite old copies of reports or include the date and time in the filename of generated reports.

- 4 Click **Next**.

To send a subscription to an FTP site

- 1 Select **FTP Site** in the Send to box.

- 2 Specify the format in the Format box.

You can specify HTML, MHTML, Excel, Word, CSV, TSV, or XML.

- 3 Enter the name of the FTP server, user name, password, and directory.

The default FTP user name is “anonymous”. You must re-enter the password to confirm it. You may also choose to overwrite old copies of reports or include the date and time in the filename of generated reports.

- 4 Click **Next**.

FTP passwords are neither stored nor transmitted securely. Valuable passwords should not be used for this purpose.

To send a subscription to a web site

- 1 Select **Web Site** in the Send to box.

- 2 Specify the format in the Format box.

You can specify HTML, MHTML, Excel, Word, CSV, TSV, or XML.

- 3 Enter the URL for the web site.

You may also choose to overwrite old copies of reports or include the date and time in the filename of generated reports.

- 4 Click **Next**.

To send subscriptions to file locations, FTP, and web sites, you must have write privileges for these directories/virtual directories. This setting must be set manually, as write privileges are not granted by default.

Selecting Reports for the Subscription

You can select reports from the available list to include in the subscription.

To select reports to be included in the subscription

- 1 Click **Add**.

The treeview is displayed.

- 2 Click **Next** to set filters and then click **Finish**.

- 3 Click **Next**.

Selecting a User Account

The reports in your subscription are generated under a specific user account.

To select a user account for the subscription

- 1 Enter the user name, password, and domain for the user account you want to use.

- 2 Click **Next**.

Naming Subscriptions

You can specify a display name to identify the subscription.

To give the subscription a display name

- 1 Enter a display name for the subscription in the Display Name box.
- 2 Click **Finish**.

This name is displayed in your list of current subscriptions.

Entering the Mail Server or Display Name

You can specify the mail server to be used to send subscription notifications and an originator's display name using the Configuration button on the main Report Subscription Service dialog box.

To enter configuration settings for subscriptions

- 1 Select the MessageStats Reports node.
- 2 Click **File | Subscriptions | Configuration**.
- 3 Edit the SMTP Server and SMTP From Address.

Notes Report Descriptions

- [Introducing the Notes Reports](#)
- [Applications Report Descriptions](#)
- [Content Analysis Report Descriptions](#)
- [Mailbox Report Descriptions](#)
- [Inventory Report Descriptions](#)
- [Notes Migration Status Report Descriptions](#)
- [Storage Report Descriptions](#)

Introducing the Notes Reports

The MessageStats Report Pack for Notes reports include reports that show information about the Domino servers and provide information about mailbox content in your Notes environment.

You can use the reports as an assessment tool for Notes to Exchange migrations, or with MessageStats for Exchange as an analysis tool in a mixed Exchange and Notes environment.

The Notes reports are located in the folder titled Report Packs. The following sections provide information about the reports in the different report subfolders.

The Applications folder contain the following report:

- [Notes Linked-To Applications](#)

The Content Analysis folder contains the following Mailbox Content reports:

- [Notes Private Folders](#)
- [Notes Shared Folders](#)
- [Notes Encrypted Messages](#)
- [Notes Links and Hotspots](#)

The Mailboxes folder contains the following reports:

- [Notes Mailbox Sizes](#)
- [Notes Mailbox Delegates](#)
- [Notes Mailbox Security](#)

The Inventory folder contains the following reports:

- [Domino Servers](#)
- [Notes Users and Mailboxes](#)
- [Notes Users](#)
- [Notes Mailboxes](#)
- [Notes Orphaned Mailboxes](#)

- [Notes Inactive Mailboxes](#)

The Notes Migration Status folder contains the following reports:

- [Migration Status per Collection](#)
- [Migration Status per Server](#)
- [Mailbox Comparison](#)
- [Distribution List Provisioning](#)
- [NSF Status](#)

The Storage folder contains the following reports:

- [Domino Servers Summary](#)
- [Domino Server Details](#)

Applications Report Descriptions

The following table contains the descriptions for the Notes reports in the Applications folder:

Table 1. Notes Applications reports.

| Folder | Report | Description | Filters |
|--------------|------------------------------|---|--|
| Applications | Notes Linked-To Applications | <p>The report reviews the Doclinks and other links in the Notes mailboxes and provides a list of the applications/databases that are linked.</p> <p>As part of migration assessment, use the report to identify the databases/applications that are linked (Doclinks) to the mailboxes. You can plan to migrate the databases/applications at the same time as you migrate the mailboxes that link to them.</p> | <ul style="list-style-type: none"> • Application Title • Select Top • Display Options • Application File • Server • Domain |

Content Analysis Report Descriptions

The following table contains the descriptions for the Mailbox Content reports in the Content Analysis folder:

Table 2. Notes Content reports

| Folder | Report | Description | ilters |
|-----------------|-----------------------|---|---|
| Mailbox Content | Notes Private Folders | <p>This report provides information about mailbox content, specifically the private folders contained in a user mail file. It shows the folder path and the number and size of items in the private folders and in subfolders.</p> <p>Since mail that is located in private folders cannot be migrated from Notes to Exchange, you can use this report during migration planning to identify mailboxes that contain private folders. You can determine if a folder is active using the Last Modified information.</p> | <ul style="list-style-type: none"> • Folder • Private Folder Owner • Folder Owner Department • Mailbox Title • Mailbox Owner • Mailbox Owner Department • Server • Domain |

Table 2. Notes Content reports

| Folder | Report | Description | ilters |
|--------|--------------------------|--|---|
| | Notes Shared Folders | This report provides information about any shared folders contained in a user mail file. It provides basic statistics such as size of the folder and the number of items in it. Shared folders are available to the users that have access to the specific mail file. In addition to user-defined folders, this report can also include standard folders such as Inbox, Sent, Junk, Trash, Drafts, Rules, All To Do's, Stationery, and Calendar Entries. | <ul style="list-style-type: none"> Folder Mailbox Title Mailbox Owner Owner Department Server Domain |
| | Notes Encrypted Messages | This report shows the mail files that contain encrypted messages. As part of a premigration assessment, you can use this report to determine which users have mail files with encrypted messages that must be decrypted before migration. | <ul style="list-style-type: none"> Mailbox Title Select Top Display Options Mailbox Owner Mailbox File Server Domain |
| | Notes Links and Hotspots | This report shows the mail files that contain links to other databases and identifies the types of links that each mail file contains. As part of a premigration assessment, you can use the report to determine which users have mail files that contain links and hotspots, and to identify the databases to which the mail files are linked. | <ul style="list-style-type: none"> Mailbox Title Select Top Display Options Mailbox Owner Mailbox File Server Domain |

Notes compresses attachments before storing them in a mail file. Mail file sizes can be viewed as either the logical uncompressed size or the physical compressed size. The mailbox content folder reports show the logical uncompressed size.

Mailbox Report Descriptions

The following table contains the descriptions for the Notes reports in the Mailboxes folder:

Table 3. Notes Mailbox reports

| Folder | Report | Description | Filters |
|--------|---------------------|--|---|
| Sizes | Notes Mailbox Sizes | This report helps you evaluate the storage space used by mailboxes across the Notes environment. You can see which mailboxes are using the most space on your Domino servers and the number of items in each mailbox. You can use the Select Top filter to limit the number of mailboxes shown in the graph. The graph can display a maximum of 50 mailboxes. | <ul style="list-style-type: none"> Date Select Top Display Options Mailbox Title Mailbox Owner Owner Department Organization Domain Server |

Table 3. Notes Mailbox reports

| Folder | Report | Description | Filters |
|------------------|-------------------------|---|--|
| Mailbox Security | Notes Mailbox Delegates | This report shows the mailboxes to which additional users have been granted access as delegates. Details are provided about the level of access that each user has to the mailbox. | <ul style="list-style-type: none"> Mailbox Title Mailbox Owner Owner Department Mailbox Server Mailbox Domain |
| | Notes Mailbox Security | This report shows security details about each mailbox and its access control list (ACL). The access control list (ACL) specifies the level of access and the specific rights that each trustee (user or group) has to the mail file. | <ul style="list-style-type: none"> Mailbox Title Mailbox Owner Owner Department Mailbox Server Mailbox Domain |

Inventory Report Descriptions

The following table contains the descriptions for the Notes reports in the Inventory folder:

Table 4. Notes Inventory reports.

| Report | Description | Filters |
|---------------------------|--|---|
| Domino Servers | Lists the Domino servers in the Domino domains, identifying each server by its server name and its fully qualified host name. The report provides details about the Domino server platform (operating system), release version, and basic network configuration details. You can insert additional information such as tasks or catalog type. | <ul style="list-style-type: none"> Mailbox Server Organization Domain |
| Notes Users and Mailboxes | This report provides a comprehensive view of the Notes users and the associated mailboxes that exist in a Domino organization. It includes individual user details, such as user location and department, and information about the associated mail file, including the number and volume of stored items. | <ul style="list-style-type: none"> Display Name User Name Company Department Organization Domain Mailbox File Mailbox Server Groups |
| Notes Users | This report shows the users for a specific organization, and lists the associated mailboxes for each user. Detailed information for each user is included such as location, department, office phone number, and internet address. | <ul style="list-style-type: none"> Display Name User Name Company Department Organization Domain Groups Manager Licenses Mailbox File Mailbox Server |

Table 4. Notes Inventory reports.

| Report | Description | Filters |
|--------------------------|--|--|
| Notes Mailboxes | <p>As an aid to mail database management, this report lists the Notes mailboxes in a Domino domain and provides detailed information about each mailbox.</p> <p>The report shows the physical path for each mail file, and includes metrics such as the number and volume of stored items and the mailbox maximum size. It also shows the mailbox creation date. You can insert information about when the mailbox was last modified by a user and which user did the modification.</p> | <ul style="list-style-type: none"> • Mailbox Title • Mailbox Owner • Mailbox File • Server • Domain |
| Notes Orphaned Mailboxes | <p>This report lists the mail files that do not have an associated Notes user. You can review this report as a part of mail file maintenance activities to determine if there are mail files that should be removed.</p> <p>The report provides detailed information about each mailbox including size, number and volume of items stored.</p> | <ul style="list-style-type: none"> • Mailbox Title • Mailbox Owner • Mailbox File • Server • Domain |
| Notes Inactive Mailboxes | <p>This report identifies the Notes mail files that had no activity during the selected date range. You can review this report as a part of normal mail file maintenance activities.</p> <p>The report shows information about each mailbox including size, the number and volume of items stored, and last modification date. It specifically identifies when the mailbox was last modified by a user and which user did the modification.</p> <p>NOTE: The mailbox associated with the gathering account will always appear in this report.</p> | <ul style="list-style-type: none"> • Date • Mailbox Title • Mailbox Owner • Mailbox File • Server • Domain |

For information about how to set filters, see [Selecting Report Filters](#) on page 49.

For information about how to use the Quick Filter bar, see [Using Quick Filters](#) on page 50.

Notes Migration Status Report Descriptions

The Notes Migration Status reports show status information about the migration of mailboxes and users from Notes to Exchange using Quest Notes Migrator for Exchange.

The Notes Migration reports are “live reports”. Information is retrieved directly from a Notes Migrator database, so report information is instantly update-to-date when the report is displayed.

Prerequisites

The following prerequisites must be met:

- You must have established a connection to a Notes Migrator database.
- The Data Migration Wizard in Notes Migrator for Exchange must have run to migrate the following data: user data, mail files, personal address books, and user archives.
- For the Mailbox Comparison report, a MessageStats Exchange Mailbox Gathering task must have completed successfully.

The following table contains the descriptions for the Notes reports in the Notes Migration Status folder:

Table 5. Notes Migration Status reports.

| Report | Description | Filters |
|---------------------------------|---|---|
| Migration Status per Collection | <p>This report provides a mechanism for reviewing Notes migration results. For each user or resource, it shows how many errors were encountered and the amount of data that was migrated. Use this report to identify the mailboxes and resources that require cleanup, re-migration, or additional actions.</p> <p>You can also use the data to calculate data throughput and to estimate the throughput of subsequent migrations. By adjusting the size of different collections based upon these numbers, you can optimize the migration resources.</p> | <ul style="list-style-type: none"> • Notes Migrator Database • Operation Type • Collection Name • Collection Label • Display Name • Data Store Type • Work Item Run Start Time • Exchange Server Name • Notes Server Name • Notes Domain Name |
| Migration Status per Server | <p>This report provides a list of objects for each server and migration information including information about the data store for each object, migration run times, and details about the data that was migrated.</p> <p>Before you shut down a Notes server, it is recommended that you review this report. By ensuring that all desired mailboxes and resources have been migrated, you can prevent the inadvertent “orphaning” of a user.</p> | <ul style="list-style-type: none"> • Notes Migrator Database • Operation Type • Display Name • Data Store Type • Work Item Run Start Time • Exchange Server Name • Notes Server Name • Notes Domain Name |
| Mailbox Comparison | <p>This report displays item counts and storage size of corresponding Notes and Exchange mailboxes. Since Notes and Exchange store data differently, the storage size numbers will not be the same. You can see the percentage progress of the migrated items.</p> <p>Use this report to obtain information on the validity of a migration and to do capacity estimates.</p> <p>Prerequisite</p> <p>A MessageStats Exchange Mailbox Gathering task must have completed successfully.</p> | <ul style="list-style-type: none"> • Notes Migrator Database • Display Name • Department • Notes Server Name • Notes Domain Name • Exchange Server Name • Exchange Organization |
| Distribution List Provisioning | <p>This report allows you to determine which distribution lists have been provisioned. It indicates not just the creation of new lists but also reports any changes to the previously migrated lists. Using the report, you can use Notes as the authoritative source for a list and periodically re-migrate the list to Exchange.</p> <p>If changes have been made to the list in Notes, the report shows detailed information on how the Notes Migrator has provisioned Active Directory to ensure the Exchange and Notes version of the list are consistent.</p> | <ul style="list-style-type: none"> • Notes Migrator Database • Display Name • Members • Notes Server Name • Notes Domain Name |
| NSF Status | <p>This report provides a mechanism to check on the migration status of specific user mailboxes or resource reservation databases.</p> <p>You can report on Notes Storage Format (nsf) files specific to a server or select specific user mailboxes or resource reservation databases and determine if and when they were migrated, error counts, and how much data was migrated.</p> | <ul style="list-style-type: none"> • Notes Migrator Database • Data Store Title • Data Store Type • Display Name • Exchange Server Name • Notes Server Name • Notes Domain Name |

Storage Report Descriptions

The following table contains the descriptions for the Notes reports in the Storage folder:

Table 6. Notes storage reports.

| Report Name | Description | Filters |
|------------------------|--|--|
| Domino Servers Summary | <p>This report provides a storage overview of the Domino servers. It shows the total storage size on the server, and both the amount and the percentage of the space that is used. You can insert data about mail-specific details such as the amount of space used by mail file databases.</p> <p>One graph shows the aggregate size of information that is stored by a server. A second graph displays the percentage of used space for the server. If the report period is greater than one day, you can view the trend of information storage over time.</p> <p>By viewing trend information over time, you can use this report to plan for future storage capacity.</p> | <ul style="list-style-type: none"> • Date • Display Options • Trend and Forecast Options • Total Disks (MB) • Disk % Used • Organization • Domain • Server |
| Domino Server Details | <p>This report provides the storage details about the space used and the space available for each disk on a Domino server. You can insert mail-specific details such as the amount of space used by mail files on each disk.</p> | <ul style="list-style-type: none"> • Date • Select Top • Display Options • Trend and Forecast Options • Disk Size (MB) • Disk % Used • Organization • Domain • Server • Disk |

Report Filter Definitions

This section provides information about the various filter settings that you can use to define the information that appears in reports.

| | | | | | |
|----------|----------|----------|----------|----------|----------|
| C | D | F | G | I | L |
| M | O | P | S | T | U |

A

Application File

Restricts report content according to the specified name of the application database file.

Application Title

Restricts report content to the criteria regarding the application title that you specify.

C

Collection Label

Restricts report content in the Notes Migration Status reports to include only the specified collection label. In Notes Migrator for Exchange, labels are used to classify collections, using alphanumeric strings, into subsets of users. For example, a label can be used to group users within a collection by geographic location or administrative level.

Collection Name

Restricts report content in the Notes Migration Status reports to the specified collection of users or groups. The migration feature of Notes Migrator for Exchange is applied to the collections of users and groups, whose members are defined through the Collection Wizard.

Company

Limits the report content to users that have the specified company name.

Creation Date

Shows the users or mail files with the specified creation dates.

D

Data Store Title

Restricts report content for the Notes Migration Status reports to include only information for the selected data store. The data store title usually reflects the user or group that owns the data store.

Data Store Type

Restricts report content for the Notes Migration Status reports to include only the selected data store types, such as mail file, personal address book, or archive.

Date

Restricts the report content to the date range that you specify. For inactive mailboxes, this is the date range for which there has been no activity for a mailbox.

Date/Time Display

Determines whether you want date and time data in the report to appear in UTC or local server time.

Department

Restricts the report content to the department associated with the user.

Delegate Department

Restricts the report to the department associated with the user who has delegate rights to the mail file.

Owner Department

Restricts the report to the department associated with the user who has owner rights to the mail file.

Detail Level

Restricts the report content to the detail that you select:

Summary indicates that you want to include only aggregated data.

Daily indicates that you want detailed records grouped by day.

Hourly indicates that you want detailed records grouped by the hour.

Disk

Restricts the report content to include only the disks (Windows) or mount points (Unix) that you select.

Disk % Used

Restricts the report content to servers with the total percentage of used volume that you specify.

Disk Size (MB)

Restricts the report content by the amount of space that you specify.

Display Name

Restricts the report content to the Display Name that you specify.

Display Options

Display Options define the components you want to include on the report:

Data and Graph presents a graph at the top of the report followed by a corresponding data table.

Data Only presents data table and suppresses the graph view.

Graph Only presents a graph and suppresses the corresponding data table.

Domain

Restricts the report content to the Domino domain that you specify.

Delegate's Domain

Limits the report to the domain in which the user (delegate) is located.

Mailbox Domain

Limits the report to the domain in which the mail file is located.

E

Exchange Organization

Restricts report content for Notes Migration Status reports to include only the selected Exchange organization.

Exchange Server Name

Restricts report content for Notes Migration Status reports to include only the selected Exchange servers.

F

Folder

Allows you to restrict the report content to include only the specified folders.

Folder Owner Department

Restricts the report to the department associated with the user who has owner rights to the private folder.

G

Groups

Restricts report content to users that belong to the specified groups in the primary Domino Directory.

I

Instant Messaging Server

Allows you to limit report content to include users with the specified Instant Messaging Server.

L

Licenses

Allows you to restrict report content to include users with the specified licenses.

Location

Restricts the report to the location or set of locations that you specify.

Notes Migrator Database

Restricts the report contents to the selected Notes Migrator for Exchange database that contains the migration status information.

M

Manager

Allows you to restrict the report contents to include only users that have the specified manager.

Mail System

Restricts the report contents to include only users or mail files in the selected mail system.

Mailbox Email Address

Restricts the report contents to include the specified e-mail address for the mail file.

Mailbox File

Allows you to limit the report content to specific mail files (.nsf).

Mailbox Owner

Allows you to limit the report content to the specified mail file owners.

Mailbox Owner Department

Restricts the report to the department associated with the user who has owner rights to the mail file.

Mailbox Physical Path

Restricts report content to mail files with the selected physical path.

Mailbox Server

Restricts the report content to the Domino mail servers that you specify.

Mailbox Title

Allows you to limit the report content to mail files that have the selected mailbox title. By default, the mailbox title is set to the name of user who owns the mail file.

Members

Restricts report content for Notes Migration Status reports to include only the selected distribution list members.

N

Notes Domain Name

Restricts report content for Notes Migration Status reports to include only the selected Domino (Notes) domains.

Notes Migrator Database

Restricts report content for Notes Migration Status reports to include only information retrieved from the specified Notes Migrator database.

Notes Server Name

Restricts report content for Notes Migration Status reports to include only the selected Domino (Notes) servers.

O

Operation Type

Restricts the report content in the Migration Status reports to include only the selected Notes Migrator operation type, such as Administrator Driven Migrator or Self-Service Desktop Migrator.

Organization

Restricts the report content to include only the Domino servers or Notes users in the specified organization.

Mailbox Organization

Restricts the report content to include only the organization to which the mail file belongs.

P

Private Folder Owner

Limits the report content to the specified owners of private folders in a mail file.

S

Select Top

Restricts the report graph content to the top number of mailboxes that you specify.

Note: If you select a number greater than 50, the report displays a maximum of 50 mailboxes in a graph.

Senders/Receivers

Restricts the report content to the senders and/or receivers that you specify.

Server

Restricts the report content to the Domino servers that you specify.

T

Total Disks (MB)

Limits the report content to servers with the total size that you specify.

Trend and Forecast Options

Indicate your graph display preference for the report.

Display Neither suppresses both trend lines and forecasts.

Trend Only includes trend lines, but not forecasts.

Trend and Forecast includes both trend lines and forecasts.

U

User

Restricts the report content to the user account that you specify.

User Name

Restricts the report content to the hierarchical name for the user that you specify.

W

Work Item Run Start Time

Restricts report content in a Notes Migration Status report to include only the information contained in migration tasks with the specified run date and time.

Quest provides software solutions for the rapidly-changing world of enterprise IT. We help simplify the challenges caused by data explosion, cloud expansion, hybrid datacenters, security threats, and regulatory requirements. We are a global provider to 130,000 companies across 100 countries, including 95% of the Fortune 500 and 90% of the Global 1000. Since 1987, we have built a portfolio of solutions that now includes database management, data protection, identity and access management, Microsoft platform management, and unified endpoint management. With Quest, organizations spend less time on IT administration and more time on business innovation. For more information, visit www.quest.com.

Technical support resources

Technical support is available to Quest customers with a valid maintenance contract and customers who have trial versions. You can access the Quest Support Portal at <https://support.quest.com>.

The Support Portal provides self-help tools you can use to solve problems quickly and independently, 24 hours a day, 365 days a year. The Support Portal enables you to:

- Submit and manage a Service Request.
- View Knowledge Base articles.
- Sign up for product notifications.
- Download software and technical documentation.
- View how-to-videos.
- Engage in community discussions.
- Chat with support engineers online.
- View services to assist you with your product.

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