Notes Report

CLX EXPORT STEPS

The Case Logistix Dashboard includes a notes report, but it will only provide all notes in a library. The info below allows you to uncomment different options for the report. To uncomment a line in SQL, you simply remove the 2 dashes from the start of the line. To comment out a line, you would add the 2 dashes back to the start of a line.

You can now run this report with any of the following options:

1 Remove line feeds, carriage returns and turn commas into semi colons

2 Get notes for just the documents in a Tag

3 Exclude Private notes

4 Exclude document level

5 Get notes created by a specific user

6 Get notes created in a date range

Select all of the text below and copy and paste into SQL Server Management Studio or into the Westlaw CaseLogsitix Administrator tool. You can save the results to a CSV file.

```
select [Doc #], "Private Note" =
    CASE
       WHEN Private = 0 THEN 'N'
       ELSE 'Y'
    END, "Anchor Note" =
    CASE
       WHEN Anchor = 0 THEN 'N'
       ELSE 'Y'
    END, AnchorPage,
```

```
-- to remove line feeds, carriage returns and
change commas to semicolons for formatting
purposes
-- you can uncomment the line below and comment
out the line afterwards that starts with Note
-- REPLACE (REPLACE (REPLACE (note , CHAR(13) ,
'' ) , CHAR(10) , ', ' ), ',',';') as Note,
--
Note, -- if you uncommented the line above, you
need to add -- at the beginning of this line
     n.DateAdded, n.DateUpdated, username, last,
mi, first
from tblnotes n, tbldocuments d, tblusers u
where n.docguid = d.docguid and n.userguid =
u.userguid
-- uncomment this next line if you want notes
just for docs in a tag, change YourTagName at
the end of the line
-- and d.DocGUID in (select docguid from
tbldocissues di, tblissues i where di.issueguid
= i.issueguid and i.issuename = 'YourTagName')
--
-- uncomment this next liine if you want to
exlcude private notes
-- and Private = 0
--
-- uncomment this next liine if you want to
exlcude document level notes
-- and Anchor = 1
--
-- uncomment this next line to only bring notes
back from a certain user, change YourUserName
at the end of the line
-- and Username = 'YourUserName'
--
-- uncomment this next line to only return
notes in a date range, update the 2 dates
values below
-- and n.[DateAdded] between '07/4/2015' and
'10/31/2015'
--
order by [Doc #], AnchorPage, noteid
```

The intelligence, technology and human expertise you need to find trusted answers.

the answer company™
THOMSON REUTERS®