# Tech Note 767 Working with InBatch Reports

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### Introduction

This *Tech Note* describes working with Microsoft Reporting Services in order to publish InBatch Reports to Wonderware Information Server.

### **Application Versions**

- InBatch 9.0 and later
- Microsoft SQL Server 2005
- Microsoft SQL Server Reporting Services 2005
- Wonderware Information Server 4.0 and later

### InBatch 9.0 Reporting Overview

Microsoft Reporting Services replaced IBM's Crystal Reports in InBatch 9.0. Leveraging MS Reporting Services consolidates ArchestrA reporting capabilities to provide Wonderware Information Server for the reporting content.

**Note:** Be sure to install **Reporting Services** when installing Microsoft SQL Server 2005. Installing Microsoft Reporting Services also installs **SQL Server Business Intelligence Development Studio**, which is a limited version of Microsoft's Visual Studio 2005 with the specific focus on SQL Server applications.

SQL Server Business Intelligence Development Studio is your Development Environment for InBatch Reports.

Note: You are responsible for all support and maintenance of any customized report.

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FIGURE 1: INBATCH REPORTING DEVELOPMENT ENVIRONMENT

# Separating InBatch Batch History Server and InBatch Reporting Content

Previous versions of InBatch required installing Batch History and Batch Information Server on the same machine. Starting with version 9.0, you have the option to split Batch History Server and Reporting content (Figure 2 below).



### FIGURE 2: DISTRIBUTED INBATCH 9.0 ARCHITECTURE

### Wonderware Information Server Replaces InBatch Report Web

Previous InBatch versions used InBatch's Report Web for configuring or running batch reports on the web. This was due to the limiting capabilities provided by Crystal Reports that prevented us to provide a tighter integration into Wonderware Information Server.

Since InBatch 9.0, Wonderware Information Server is the host for all Reporting related tasks, including running, exporting, publishing and scheduling automated report generation, or even scheduling maintenance on the Batch Historian Server.

### **Retained Features**

• The Batch History Database structure (Schema) has not changed. All queries that you created for Crystal Reports can remain unchanged and can be reused within Microsoft Reporting Services.

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BatchHistory		
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🖃 🦲 Tables	Name	Schema
🕀 🧰 System Tables	System Tables	
dbo.AlarmComment	AlarmComment	dbo
dbo.AnalogAlarm	ApalogAlarm	dbo
dbo.ApacsAlarm	Aparsélarm	dho
Image:	ApacsOperatorAction	dbo
dbo.ArchiveHistory		dho
<ul> <li>dbo.AuditEvent</li> </ul>	Audit Current	dbo
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<ul> <li>dbo.BatchDetail</li> </ul>	Bacch4dmin	dbo
<ul> <li>dbo.BatchIdLog</li> </ul>	La BatchDetail	dbo
	BatchIdLog	dbo
<ul> <li>dbo.BatchQuestion</li> </ul>	BatchInfo	dbo
<ul> <li>dbo.BooleanAlarm</li> </ul>	BatchQuestion *	dbo
<ul> <li>dbo.CodeTable</li> </ul>	III BooleanAlarm	dbo
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<ul> <li>dbo.PhaseInstruction</li> </ul>		dbo
dbo.ProcessLog	Operator Commence	dbo
dbo.ProcessVar	I PhaseInstruction	dbo
dbo.ProcessVarChange	I ProcessLog	dbo
dbo.ReportDef	U ProcessVar	dbo
dbo.ReportLog	ProcessVarChange	dbo

FIGURE 3 - BATCH HISTORY SCHEMA



FIGURE 4: WIS BATCH REPORTING OPTIONS

• While installing the InBatch Reporting Content the actual report source files (\*.rdl) will be installed too. The default directory for these report files is C:\Program Files\Wonderware\InBatch\Reporting Services (Figure 5 below).

InBatch 9.0 provides all reports that you might know from previous versions of InBatch. If you created custom reports through Crystal Reports there will be no issues in executing them against InBatch 9.0 since the underlying metadata structure has not changed.

However, the one fundamental change is that the trigger that creates a report is no longer sent to Crystal Reports but to Information Server. This means that any custom reports that were triggered automatically will have to be re-built using Microsoft Reporting Services.

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AlarmRptServicesDeploy.sql	0 KB	Microsoft SQL Serv	9/8/2008 8:58 AM	A		
BatchManagerNodeCreation.sql	1 KB	Microsoft SQL Serv	9/8/2008 8:58 AM	A	l g	
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ExecuteReport.sql	2 KB	Microsoft SQL Serv	9/8/2008 8:58 AM	A	12	
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ReportLogAdmn.sql	2 KB	Microsoft SQL Serv	9/8/2008 8:58 AM	A		
ReportSibling.sql	1 KB	Microsoft SQL Serv	9/8/2008 8:58 AM	A		
Report/View.sql	2 KB	Microsoft SQL Serv	9/8/2008 8:58 AM	A		
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Schedule.sql	2 KB	Microsoft SQL Serv	9/8/2008 8:58 AM	A	_/	
WIS_Links.sql	7 KB	Microsoft SQL Serv	9/8/2008 8:58 AM	A	1	
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IBBatchQuestions.rd	67 KB	Report Definition File	9/8/2008 8:58 AM	A	1	
IBBatchSeqExecution.rdl	63 KB	Report Definition File	9/8/2008 8:58 AM	A	8	
IBBatchTransitionsExpression.rd	47 KB	Report Definition File	9/8/2008 8:58 AM	A	6	
IB8PMaterialInputChanges.rd	74 KB	Report Definition File	9/8/2008 8:58 AM	A		
IB8PMaterialInputs.rd	85 KB	Report Definition File	9/8/2008 8:58 AM	A		
IB8PMaterialOutputs.rdl	79 KB	Report Definition File	9/8/2008 8:58 AM	A	1	
IB8PProcessVariableChanges.rdl	74 KB	Report Definition File	9/8/2008 8:58 AM	A	2	
IB8PProcessVariables.rd	64 KB	Report Definition File	9/8/2008 8:58 AM	A	1	
IBPhaseComments.rd	63 KB	Report Definition File	9/8/2008 8:58 AM	A	5	
IBPhaseExecutionEvents.rd	63 KB	Report Definition File	9/8/2008 8:58 AM	A	9	
IBPhaseInstructions.rd	49 KB	Report Definitio	9[8[29 8:58 AM	A		
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FIGURE 5: INBATCH'S \*.RDL SOURCES

# Editing and Modifying Existing Standard Reports

1. Start SQL Server Business Intelligence Development Studio by clicking Start > All Programs > Microsoft SQL Server 2005 > SQL Server Business Intelligence Development Studio (Figure 6 below).



FIGURE 6: START SQL SERVER BUSINESS INTELLIGENCE DEVELOPMENT STUDIO

2. Within Visual Studio's IDE, create a New **Report Server Project** by pressing **Ctrl + Shift + N**, or click **File > New > Report Server Project**.

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ocation:	C:\Documents an	nd Settings\LocalAdmin\My Documents\Visu	ual Studio 2005\projects	Browse
iolution Name:	BatchReporte	<b>v</b>	Create directory for solution	

FIGURE 7: NEW VISUAL STUDIO REPORT SERVER PROJECT

- 3. In the Visual Studio IDE, right-click Solution Explorer and click Shared Data Source to create a new Shared Data Source called aaReports.
- 4. Click Edit in the Shared Data Source dialog box.
- 5. Configure the **Connection Properties** as in Figure 8:2 (below).

General Credentials	Connection Properties	? ×
Name: aaReports Type: Microsoft SQ, Server Connection string:	Data source: Microsoft SQL Server (SqlClient) Change. Server name: WWSYS Refrest Log on to the server	
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OK Cancel Help	Attach a database file:      Derowse      Logical name:	
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FIGURE 8: SHARED DATA SOURCE AND CONNECTION PROPERTIES

The Shared Data Source name must be **aaReports** for existing reports.

**IMPORTANT:** DO NOT SELECT BatchHistory as the database – select **aaReports**. For editing existing reports, the shared data source must be named **aaReports** and point to the **aaReports** Database -- otherwise the report won't work.

## Import the Existing Report into Your Project

1. In Visual Studio IDE right-click **Solution Explorer** and click **Reports > Add > Existing Item**.

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FIGURE 9: ADD EXISTING ITEM

2. Browse to the directory in which the source files (\*.rdl) are located and select the report that you want to change.



FIGURE 10: LOCATE THE TARGET REPORT

3. Apply modifications as desired.



#### FIGURE 11: CHANGING THE REPORT

**Important:** To make sure that the *current* existing report remains unchanged in your system, it is strongly recommended to use a different name for your new report instance. For example, renaming **IBBatchJournal.rdl** to **MyBatchJournal.rdl** is strongly advised (Figure 12 below).



Properties	- 4 ×
IBBatchJournal.	rdl 🔹
?	
🗆 Location	
File Name	MyBatchJournal.rdl
Full Path	C:\Documents and Setting

FIGURE 12: RENAMING YOUR FILE INSTANCE

Once finished with editing the report, and saving the report as part of your project, you need to copy the new report.rdl file into the InBatch Reporting Content location you chose.

## Example: Changing the Existing Report Header

Once you performed the steps above, you should see the report within Visual Studio. For this example, we can change out the existing image called **SiteLogo** (Figure 13 below).

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·	=Parameters!Layo =Code.GetFilterString(Para	ameters!CampaignID.Count,
	=Parameters!Layo =Code.GetFilterString(Para	ameters!LotID.Count,
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FIGURE 13: CHANGE OUT SITELOGO IMAGE

1. Right-click the logo and click Delete.



Figure 14: Delete the Image Used

for the logo.

2. Open the Toolbox.



FIGURE 15: OPEN THE TOOLBOX

3. Add an image from the Report Items list.



FIGURE 16: ADD AN IMAGE TO THE REPORT

4. Choose the image you want to use in the new report.



FIGURE 17: CHOOSE YOUR IMAGE

5. You should have your logo handy for inclusion.



FIGURE 18: NEW IMAGE

6. Arrange for the right appearance, and save the report.



## Publishing the Modified Report on Wonderware Information Server

You are now ready to deploy the report onto Wonderware Information Server. The **Deploy ArchestrA Reports** utility provides the means to publish ArchestrA Reports at any time.



FIGURE 20: DEPLOY ARCHESTRA REPORTS UTILITY

To prepare for the deployment you need to manually adjust the report services configuration.

The InBatch Reporting Content location contains the configuration file. Use Notepad (or any more powerful XML editor) to edit **RptServicesConfig.xml**.

1. For each report add one separate XML Element:

<Report name= "<MyReport Name>" file="< name of the file that contains your report>" description="<description for your report"/>

For example:

<Report name= "Personal Journal Report" file="MyBatchJournal.rdl" description="This is my first modified batch report"/>

Now you can run **Deploy ArchestrA Reports**. The utility reads the modified XML configuration and updates Information Server's Report Database. All reports listed in the configuration file are published under **InBatch/ Execute Reports**.

- 1. Start Deploy ArchestrA Reports.
- 2. Click the Existing Shared Data Source option. This refers to the aaReports you created in a previous step.

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- 3. Select **Production** from the **Existing SDS Type** drop-down list.
- 4. Browse for the edited Configuration file.
- 5. Click the **Deploy** button (Figure 21 below).

aaReports Database			
Deploy Reports	Deploy Reports - Ret	rieve or configure shared data source	
	Existing Shared Data	Source	
	C Create New Shared I	Data Source Type and Default Data Source	
	Existing SDS Type	Production	
	New SDS Type		
	Default Data Source		
	Data Source Name	InBatchSDS	
	Server Name	WWSYS	
	Database Name	BatchHistory	
	Windows Authentica	tion	
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FIGURE 21: DEPLOY REPORT TO WIS

After the deployment process is done, you see your report within Information Server. You might need to refresh your browser (press the **F5** button).

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## Automated Generation of InBatch Custom Reports

Now we need to adjust Information Server's settings to allow the report triggered on a batch event or schedule.

The adjustments necessary are very similar to the ones discussed above. Instead of using **RptServicesConfig.xml** at the InBatch Reporting Content location, you must use the file that is located on your web server.

Use the **RptServicesConfig.xml** that is located at **C:\Inetpub\wwwroot\Wonderware\InBatchReports\ReportConfig** (assuming a default installation) and add your report to the existing list.

Now you can use the same methods as for the standard reports to arrange for your report to be generated automatically (Figure 23 below).

System       Report Configuration         Administration       Add Report Config > A         Application Manager       Add Report Config > A         User Manager       Add Report Config > A         Dota Source Manager       Description         Portal Configuration       Data Source Manager         Portal Configuration       Data Source Manager         Panel Manager       Output To Printer         Panel Manager       Printer         Documentation       Output To File         Documentation       Output To File         Configuration       Schedule         Reports       Configuration         Schedule       Add Report         Report Log Admin       History         Addmin User       Achiving         Error Queue       Table Weaver Manager         Process Graphics       Years         Process Graphics       Years         Years       Years	d Report
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### FIGURE 23: ADD AUTOMATED REPORT GENERATION

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