

Qlik Insight Bot February 2020

Upgrade Notes

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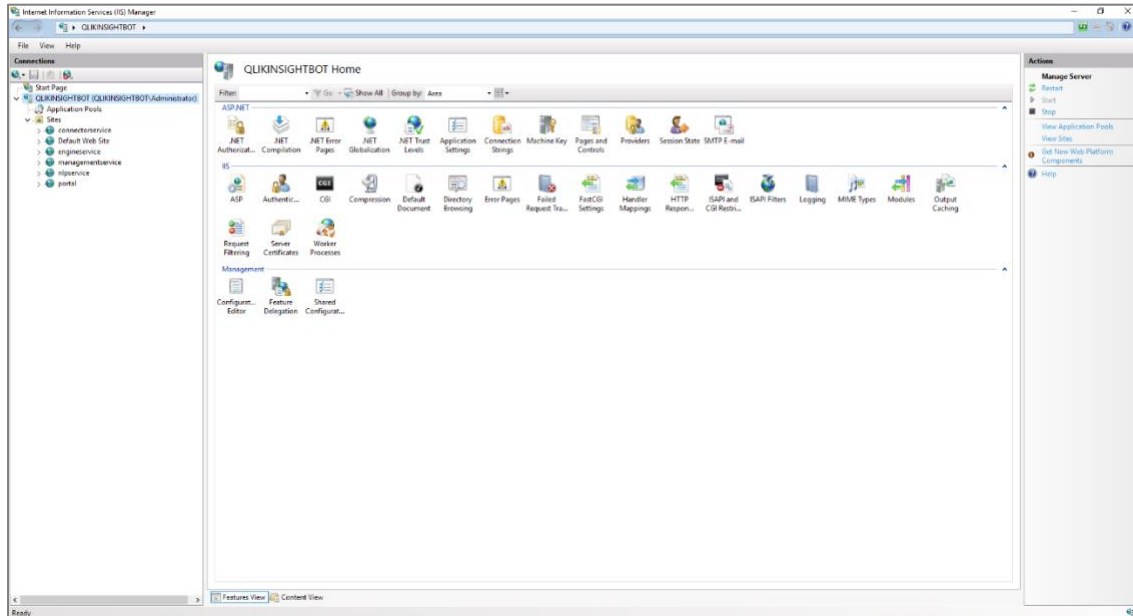
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How to upgrade to Feb 2020 - 1.3.0

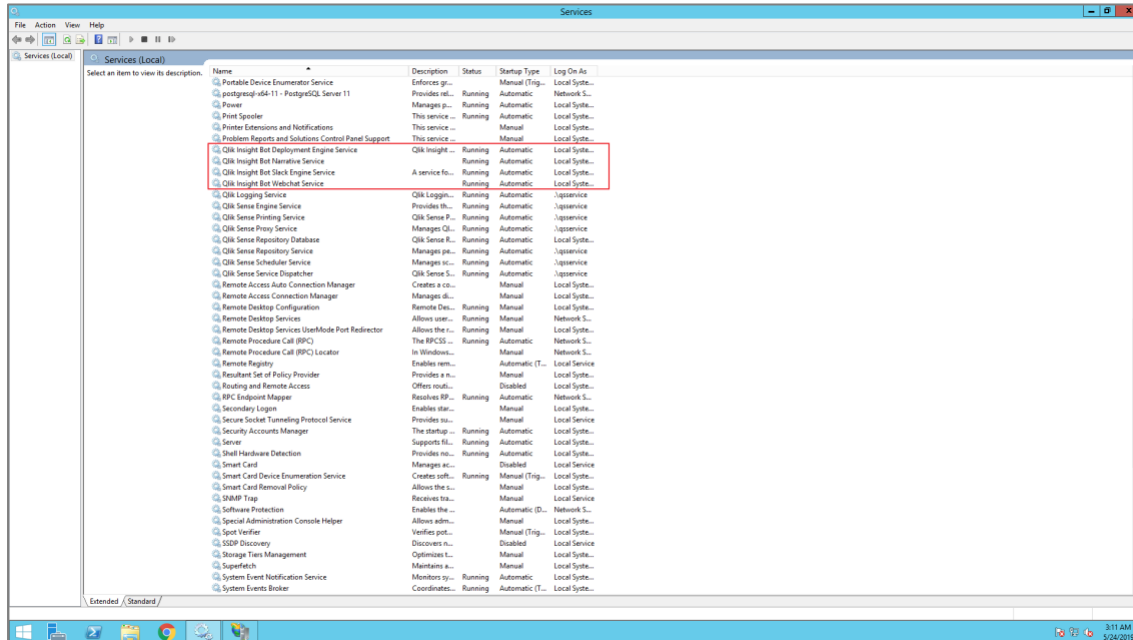
Following below instructions will upgrade the version of Qlik Insight Bot to **1.3.0**.

Stop All QIB Services

1. Open **IIS Manager** and stop **all** sites related to Qlik Insight Bot.



2. Open **Windows Service** and stop all Qlik Insight Bot services.



3. Take backup of file **config.json** located at **C:\Program Files(x86)\Qlik Insight Bot\Qlik Insight Bot Webchat Service** from the machine where QIB webchat is installed in case of Qlik Sense Nov 2019 and earlier versions.
4. Take a copy of System.xml file from **C:\ProgramData\Qlik Insight Bot\Configuration**

5. Uninstall below programs

- Qlik Insight Bot Applications
- Qlik Insight Bot Services
- Qlik Insight Bot Narrative Service
- Qlik Insight Bot Webchat Service (if installed)
- Qlik Insight Bot Slack Engine Service (if installed)
- Qlik Insight Bot SFB online Service (if installed)

6. Check if below folders deleted

- C:\Program Files(x86)\Qlik Insight Bot
- C:\inetpub\wwwroot\
 - qlikinsightbotengineservice
 - qlikinsightbotmanagementservice
 - qlikinsightbotnlpservice
 - portal

7. Check if IIS has all websites removed related to Qlik Insight Bot.

8. Open folder C:\ProgramData\Qlik Insight Bot\Certificates and delete following certificates

- Client.pem
- Client_key.pem
- Narrative.crt
- Narrative.key
- Webchat.crt
- Webchat.key

Installation and Configuration

From version Nov 2019

1. Create a user group in windows named Qlik Insight Bot Administrators. Add your administrators to that group.
2. Export Qlik Sense certificates from Qlik Sense Management Console with no password and including the key. Export the certificates in both the formats (windows and pem)
3. Copy below mentioned certificates to QIB server
 - a. root.cer
 - b. client.pfx
 - c. root.pem
 - d. server.pem
 - e. server_key.pem
4. Place below certificates into C:\ProgramData\Qlik Insight Bot\Certificates
 - a. root.pem
 - b. server.pem
 - c. server_key.pem

5. Install root.cer under Trusted Root Store.
6. Install Qlik Insight Bot Feb 2020 Components in below sequence
 - a. Install **Qlik Insight Bot Applications**.
 - b. Install Qlik Insight Bot Narrative Service
 - c. Install Qlik Insight Bot NLU Service **on same server** as other QIB components and configure as below
 - i. Open C:\ProgramData\Qlik Insight Bot\DB Source
 - ii. Run qib_nlu_db_1_3_0.bat as administrator and provide the asked information
 - iii. Run qib_nlu_conf_1_3_0.bat as administrator and provide asked information.
 - d. Or Install Qlik Insight Bot NLU Service **on separate server** then other QIB components
 - i. Install PostgreSQL 11
 - ii. Open C:\Program Files(x86)\Qlik Insight Bot\Qlik Insight Bot NLU\DB Source
 - iii. Run qib_nlu_db_1_3_0.bat as administrator and provide the asked information
 - iv. Run qib_nlu_conf_1_3_0.bat as administrator and provide asked information.
 - v. Copy folder C:\ProgramData\Qlik Insight Bot from other QIB component's server
 - vi. Paste copied folder on NLU server.
 - e. Install Qlik Insight Bot Duckling.exe
 - f. Install Qlik Insight Bot Webchat Service.exe (in case of Nov 2019 and prior)
 - g. Install Qlik Insight Bot Slack Engine Service.exe (if previously installed)
7. Open Qlik Insight Bot Configuration Application from desktop and login using windows credentials (an admin user which was added to windows user group of QIB)
8. Verify the configuration details inside the application
9. Go to Components section -> Provide the new URL address of NLU and click Configure NLU.
10. Close the configuration application if all configurations are unchanged.
11. Install **Qlik Insight Bot Services**.
12. Configure the ports to the IIS services (follow the deployment guide for ports binding)
 - a. 4434 - engineservice
 - b. 4436 - managementservice
 - c. 4437 - nlpservice
 - d. 4435 – portal
13. Configure SSL settings (Require SSL and Accept) for below services in IIS –
 - a. Engine Service
 - b. Management Service
 - c. NLP Service
14. Make sure that portal has windows authentication enabled
15. Go to C:\ProgramData and share Qlik Insight Bot folder with the server where Webchat Service and NLU service installed (Not required if on the same machine). These steps are required in case of Qlik Sense Feb 2020.
16. Go to Qlik Sense server (Follow only if QSE Feb 2020), open C:\Program Files\Qlik\Sense\QibWebchatService
 - a. Edit appsettings.json file and find QIBSystemPath
 - b. Set shared location path (\\\\<Network-Machine-Name>\Qlik Insight Bot\Configuration) in the value of Path
 - c. Save.

- d. Restart Qlik Sense Dispatcher and Proxy service
- 17. In case of QSE Nov 2019 and prior, if Webchat Service is installed on a machine separately from other QIB components, make the appropriate changes in **config.json** located at **C:\Program Files(x86)\Qlik Insight Bot\Qlik Insight Bot Webchat Service** as it is there in backed-up version.
- 18. Restart web services related to QIB from IIS and windows services.
- 19. Create a security rule in QMC to give user access to QIB
 - a. Create new security rule
 - b. Keep the rule Unspecified and give appropriate name.
 - c. Resource must be "**QIBUser_***" and read action for access.
 - d. Click save.
- 20. Train upgraded NLU
 - a. Open Management Console
 - b. Push metadata of each deployed application with dimensional values
 - c. Train the Bot once the NLU is updated. Select to push users information with training.

You should now be ready to interact with the latest version of Qlik Insight Bot.