Qlik **Insight Bot** February 2020

Upgrade Notes

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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.

Services (Local)						
elect an item to view its description.	Name	Description	Status	Startup Type	n As	
	Portable Device Enumerator Service	Enforces gr		Manual (Trig	Syste	
	Approximate Server 11 PostgreSQL Server 11	Provides rel	Running	Automatic	ork S	
	C Power	Manages p	Running	Automatic	Syste	
	😪 Print Spooler	This service	Running	Automatic	Syste	
	Printer Extensions and Notifications	This service		Manual	Syste	
	Reports and Solutions Control Panel Support	This service		Manual	Syste	
	Glik Insight Bot Deployment Engine Service	Qlik Insight	Running	Automatic	Syste	
	Clik Insight Bot Narrative Service		Running	Automatic	Syste	
	Qlik Insight Bot Slack Engine Service	A service fo	Running	Automatic	Syste	
	Q Qlik Insight Bot Webchat Service		Running	Automatic	Syste	
	Q Qlik Logging Service	Qlik Loggin	Running	Automatic	nvice	
	Qlik Sense Engine Service	Provides th	Running	Automatic	nice	
	Qlik Sense Printing Service	Qlik Sense P	Running	Automatic	nice	
	Qlik Sense Praxy Service	Manages QL.	Running	Automatic	nice	
	Qlik Sense Repository Database	Qlik Sense R	Running	Automatic	Syste	
	Qlik Sense Repository Service	Manages pe	Running	Automatic	nice	
	Qlik Sense Scheduler Service	Manages sr	Running	Automatic	nice	
	Qlik Sense Service Dispatcher	Qik Sense S	Running	Automatic	nist	
	Remote Access Auto Connection Manager	Creates a ro		Manual	Syste	
	Remote Access Connection Manager	Managers di		Manual	Suite	
	A Remote Desiton Configuration	Remote Des	Running	Manual	Suite	
	A Remote Desiton Services	Allows user	Running	Manual	ay man	
	Pernote Desktop Services	Allows the s	Russian	Manual	Sunta	
	Periode Post Recently Services Uservices Port Redirector	The PRCCC	Russian	Automatic	and the second s	
	Remote Procedure Call (RPC) Remote Reserve Call (RPC)	ine RPUSS	Running	Manual	en en	
	Remote Processire Car (NPC) Locator	Easthlas see		merruell Automotics (T	PR. Jun Families	
	Residue to the first of the first fi	chables rem		Mutomatic (T	Service 6	
	Resultant Set of Policy Provider	Provides a n		Manual	3yste	
	No Routing and Remote Access	offers routi		unsabled	3yste	
	RPC Endpoint Mapper	Resolves RP	Running	Automatic	ork S	
	Ga Secondary Logon	Enables star		Manual	Syste	
	Secure Socket Tunneling Protocol Service	Provides su		Manual	Service	
	Security Accounts Manager	The startup	Kunning	Automatic	Syste	
	Server	Supports fil	Running	Automatic	Syste	
	Shell Hardware Detection	Provides no	Running	Automatic	Syste	
	Smart Card	Manages ac		Disabled	Service	
	Smart Card Device Enumeration Service	Creates soft	Running	Manual (Trig	Syste	
	Smart Card Removal Policy	Allows the s		Manual	Syste	
	SNIMP Trap	Receives tra		Manual	Service	
	Software Protection	Enables the		Automatic (D	ork S	
	Special Administration Console Helper	Allows edm		Manual	Syste	
	😪 Spot Verifier	Verifies pot		Manual (Trig	Syste	
	SSDP Discovery	Discovers n		Disabled	Service	
	Storage Tiers Management	Optimizes t		Manual	Syste	
	😘 Superfetch	Maintains a		Manual	Syste	
	System Event Notification Service	Monitors sy-	Running	Automatic	Syste	
	System Events Broker	Coordinates	Running	Automatic (T	Syste	
tended (Standard /						

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