INSTALLING AND CONFIGURING QLIK INSIGHT BOT

Contents

Introduction

To have Qlik Insight Bot ready-to-serve, you are required to install a couple of components and do several configurations.

The purpose of this document is to guide you how to install and configure Qlik Insight Bot using rich configuration application.

Below are the components which can be downloaded from Qlik's software download site –

1. Qlik Insight Bot Applications.exe
2. Qlik Insight Bot Services.exe
3. Qlik Insight Bot Narrative.exe
4. Qlik Insight Bot Webchat Service.exe
5. Qlik Insight Bot Slack Engine Service.exe
6. Qlik Insight Bot SFB Online Service.exe

Qlik Insight Bot Licensing

Qlik Insight Bot license is integrated with Qlik Sense (QSEfW) license. You need to subscribe your Qlik Sense before you can use Qlik Insight Bot. Qlik™ will provide you with Qlik Sense license enabled with Qlik Insight Bot. If you are already a customer of QSEfW, you will have to request Qlik™ to update your license for Qlik Insight Bot. Once it is updated by Qlik™, it will take ~24 hours to update at your side. If you are using Qlik Sense offline, you will have to request for updated LEF and reapply it.

There are two types of subscriptions for Qlik Insight Bot where -

1. Qlik Sense license contains attributes to activate Webchat on Hub and Extension only.
2. Qlik Sense license contains attributes to activate third party chat platforms (Slack, MS Teams and Skype for business) along with Webchat on Hub and Extension

When you configure your Qlik Sense for Qlik Insight Bot from Configuration Application, it will retrieve Qlik Sense license information and activate the Insight Bot if it is subscribed. Steps to configure Qlik Sense in Qlik Insight Bot is mentioned later in this document here.

Note:

Qlik Insight Bot license will not be activated in below scenarios.

1. **Qlik Sense February 2019 will not work if QS license is applied using Signed License Key (SLK).**
2. **Qlik Sense with Tokens based license will not work with any Qlik Sense versions if SLK is applied.(This is unrelated to QIB)**

Installation and Configuration

Below are the applications/services that should be installed in following order.

Mandatory Installations:

1. Qlik Insight Bot Applications
2. Qlik Insight Bot Services
3. Qlik Insight Bot Narrative Service

Install any/all of the below service(s) based on your preferred channel(s).

1. Qlik Insight Bot Webchat Service
2. Qlik Insight Bot Slack Engine Service
3. Qlik Insight Bot SFB Online Service

Note: Qlik Insight Bot Slack Engine Service and Qlik Insight Bot SFB Online Service are to be installed only if Azure Web App Bot is not being used.

### Install and configure Qlik Insight Bot Applications

Execute the setup file in Administrator mode. Once finished successfully, you should have –

- Qlik Insight Bot Configuration Application
  A Windows application to perform various configurations (explained later in this document)
- Qlik Insight Bot Portal
  A web application to manage all Qlik Sense apps you require to configure for Qlik Insight Bot and users who can access Qlik Insight Bot.
- PostgreSQL Server

Configure Qlik Insight Bot Configuration Application

1. Open **Qlik Insight Bot Configuration** application, from the desktop, in Administrator mode.
2. Register with Email and Password of your choice (A password must be at least 8 characters including 1 number and 1 special character), click **Register**.
   Note: The same credential will be used to login to Qlik Insight Bot Management Console.
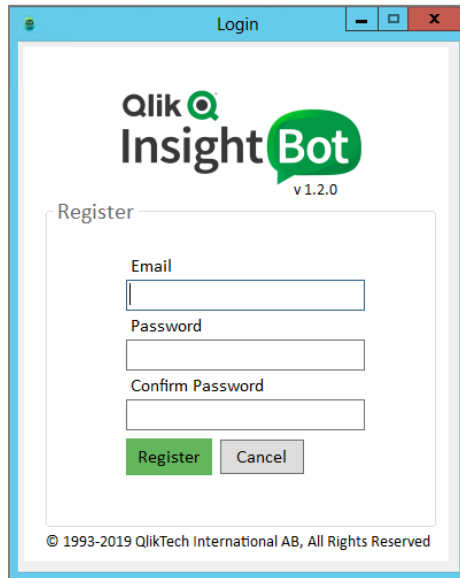
3. Enter credentials to Login.
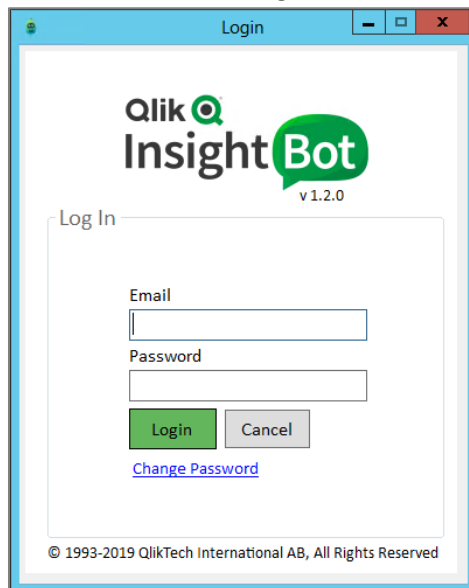
4. Enter below parameters on **Qlik** Configuration section to configure **Qlik Sense**. Click **Connect** to connect with your Qlik Insight Bot subscribed Qlik Sense environment.

QRS URL	Qlik Sense Server Proxy URL to connect with Qlik Sense Repository service. If you are configuring the Qlik Sense multi node, use the Proxy URL of central node. Also, if you are configuring Qlik Insight Bot on the same server on which Qlik Sense Server is installed, use **localhost** as a server URL else use **Qlik Sense Server URL**. e.g. https://localhost or https://qliksense.domain.com Qlik Sense Proxy Service port which is 4242 by default.
Qlik User ID	Qlik Sense user id with "Root Admin" access.

|	e.g. wsmith
Qlik User Directory	Name of the User Domain Directory from Qlik Sense. e.g. domain
Certificate	A **client certificate** of Qlik Sense Server. e.g. C:\ProgramData\Qlik\Sense\Repository\Exported Certificates\<Machine Name>

After inserting above information, click **Connect** which will retrieve license information and verify if Qlik Sense is subscribed to use Qlik Insight Bot. On successful verification and connection, you will receive a message with successful connection and will give the list of streams and proxies available. If it is not subscribed, message would be "You do not have a license for this function. Please contact Qlik Sales for more information."

Stream	Select the Qlik Sense Stream you want to configure.
Node Status Check Interval	Set time interval to check status of node allocated for Qlik Insight Bot Multi-Node.
Proxies	Select the Proxy from the list of available proxies.
Virtual Proxies	Select the Virtual proxy from the list of available virtual proxies.
External URL	A Single Configurator URL points to an *on-the-fly* Qlik Sense object and sent as a link to you when you demand a chart from Qlik Insight Bot. e.g. https://qliksense.domain.com Note: "localhost" as a value must not be used here.
Node	Select Load Balancer node. Which will be used by Qlik Insight Bot to interact with Qlik Sense.
Certificate	A **client certificate** of node you have selected. e.g. C:\ProgramData\Qlik\Sense\Repository\Exported Certificates\<Machine Name>

After inserting above information, click **Test Connection** to check if connection is established or not. If connection established successfully, click **Add**. You can also add multiple nodes.

Note: Qlik Insight Bot can connect to Qlik Sense Server by only means of the host name of Qlik Sense node. When the host name of Qlik Sense node is not bound to its domain, it is required to map the host name of Qlik Sense node with its IP address.

Refer Appendix I for the steps to map host name of Qlik Sense node with its IP address.
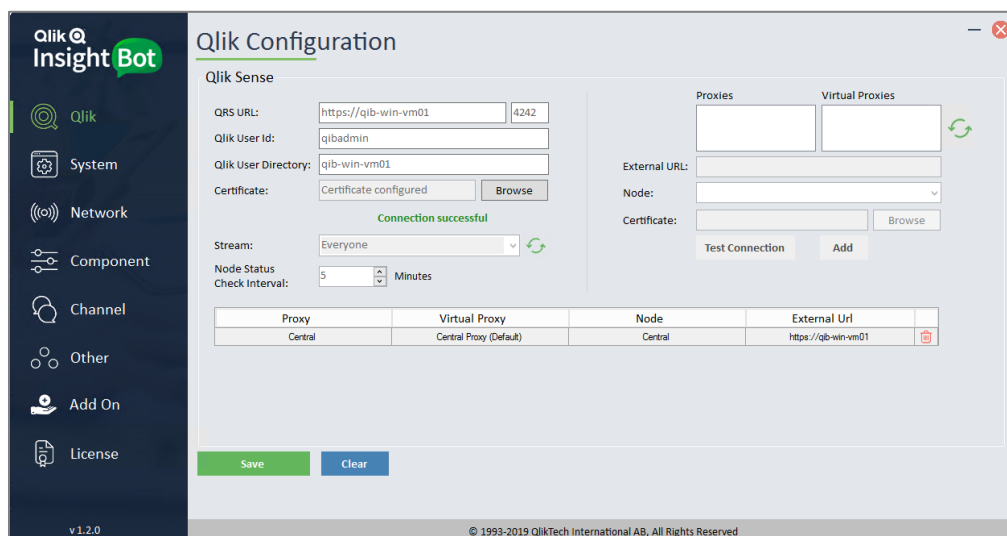
5. Enter below parameters on **System** Configuration section to configure **Postgres Database, Azure Bot** and **Alert** function. Click **Save** to save all details.

Database

Name	qlikinsightbot
Port	Enter PostgreSQL port, which is "5432" by default.
	Note: Refer Appendix II to check and verify the PostgreSQL port.
User	Superuser Name of Postgres which is **postgres** by default.
Passwords	Password of the Superuser of Postgres (which is "postgres" by default).

Once you enter password, click **Create Database** to create a database.
You can change the default password.

Current Passwords	Password of the Superuser of Postgres (which is "postgres" by default).
New Passwords	New Password of the Superuser of Postgres.
Confirm Passwords	Confirm new Password of the Superuser of Postgres.

Azure Bot

Enter **Microsoft App Id**, **Microsoft App Password**, **Storage Connection String (optional)** of the bot which have been created (refer **Step-8** and **10** of **QIB - Creating Bot in Azure** document).
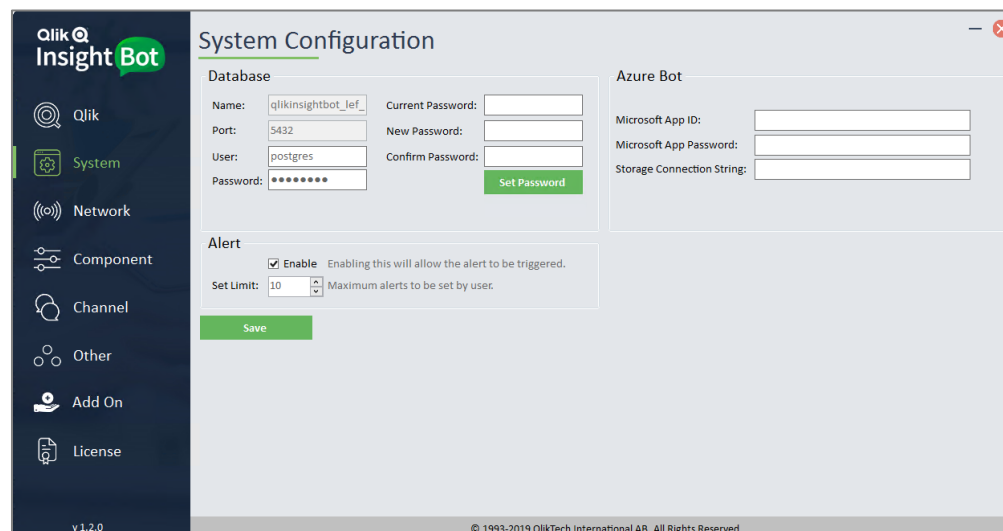
Alert

Check "Enable" to send alert(s) email to user. (By default, it is enabled). Alert can only be sent if below conditions fulfilled.

1. It is enabled from Configuration Application.
2. Qlik Sense Application reloaded (minimum time difference between Qlik Sense application reload is 2 hours).
3. Alert condition(s) fulfilled.

Alerts can be set to trigger once or recurring.

1. **Once**: Default, it is set to Once. Alert will trigger once and then disabled.
2. **Recurring**: Alert will be sent every time when Qlik Sense application reloads, and condition(s) matched.

Set Limit: Maximum number of alerts a user can set.

6. From **Network** Configuration section, you can configure SMTP to enable **Alert me** and **Email me** features.

SMTP Server	The host name of the SMTP (Simple Mail Transfer Protocol) server of email Id entered in Email which will be used to send mails for Alert me, email me features.
SMTP Port	The Port number of the SMTP server.
Email	A legitimate Email ID.
Password	Password of the Email ID.
Use SSL	Check it to enable Secure Socket Layer (Recommended).
Test email address	Email address to send a test mail.
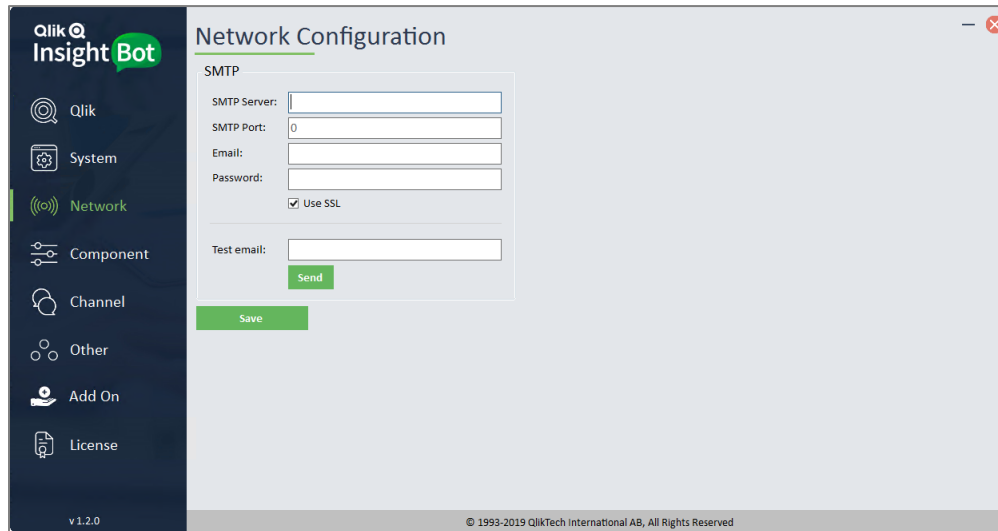
7. **Component** Configuration section allows you to configure **Management**, **NLU**, **Narrative**, **NLP** services.

Management Service Configuration

Remote URL	Remote URL of Qlik Insight Bot Management Service which will be https://localhost:4436
Local URL	Local URL will generate automatically.

NLU Service Configuration

URL	URL of Qlik Insight Bot NLU Service along with its port number on which Qlik Insight Bot NLU is installed which will be like https://<servername>:5000 – If "**isHttps**" is set to **true** in the "Docker-compose.yml" file. http://<servername>:5000 – If "**isHttps**" is set to **false** in the "Docker-compose.yml" file. (refer Step 2 of QIB - Installing Qlik Insight Bot NLU)

Narrative Service Configuration

|	
Host	Host name of server on which Qlik Insight Bot Narrative Service is installed in this case it will be https://localhost
Port	Port number of Qlik Insight Bot Narrative Service, on which you want to start Qlik Insight Bot Narrative Service, by default it will be 8001.

Allow Remote Host	This will allow Qlik Insight Bot to communicate with Narrative service when installed on another machine than the Qlik Insight Bot. If you are using PC Name, IP Address or Domain name instead of localhost in **Host**, check this option. This will add the host as a trusted entity.

NLP Service Configuration

URL	URL of Qlik Insight Bot NLP Service which will be https://localhost:4437
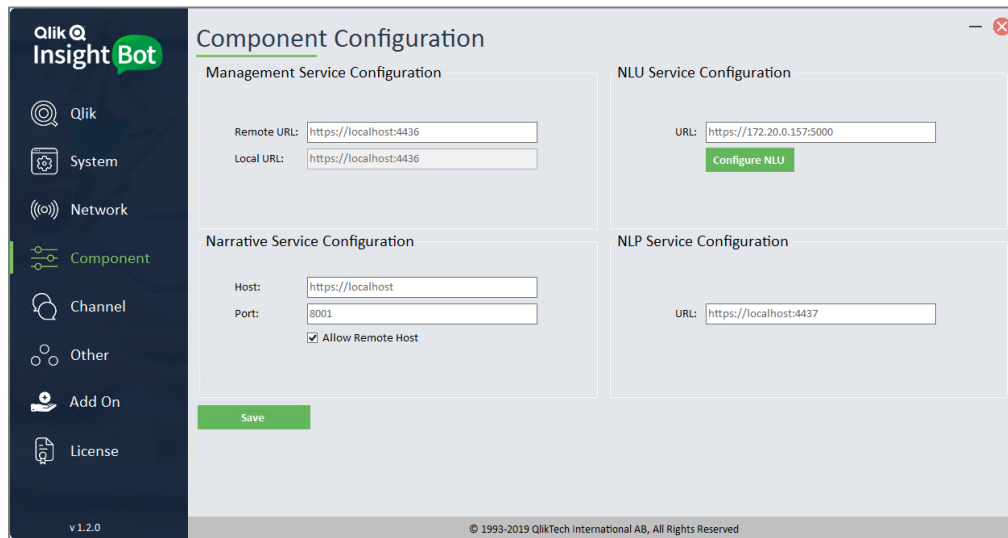
8. On **Channel** Configuration section, you can configure **Slack**, **Skype for Business**, **Webchat** channels through which you want to communicate with the Qlik Insight Bot.

Slack

| Allow New Users	This will allow new user(s) to be added.
Token	Use the **Bot User OAuth** access token which we have generated in **Save Application Credentials** section of **QIB – Configuring Channel** document. e.g. xoxb-000000000000-000000000000-xxXXxx0xx0xxxXXxxXxxx00x
Qlik Insight Bot Engine URL	If you are using "Qlik Insight Bot Slack Engine" exe, Qlik Insight Bot Engine service url which must be the below https://localhost:4434 Leave this field blank if "Qlik Insight Bot Slack Engine Service" is not used.

Skype for Business

SFB Username	The user created in Office 365 environment. (QIB - Configuring Channels)
Password	Password of the user created in Office 365 environment.
Tenant	Domain name of SFB User Name. E.g. qlik.com
Client ID	Provide the Application ID which we have saved earlier. (QIB - Configuring Channels)
Qlik Insight Bot Engine URL	Qlik Insight Bot Engine service url https://localhost:4434

Webchat

Qlik Insight Bot Engine URL	If Qlik Insight Bot and Qlik Sense server are installed on the same machine, use Qlik Insight Bot Engine service url https://localhost:4434 If Qlik Insight Bot and Qlik Sense server are on different machines, provide the URL which can be accessed by webchat service. E.g. https://<Server URL>:4434
Webchat Service URL	This URL should be the URL of the machine on which you have installed Qlik Insight Bot webchat service which may be the same as the Qlik Sense access URL from outside the network.

Note: You are required to configure webchat to use Qlik Sense Extension and Webchat for Qlik Sense Hub. There is a separate document for webchat service named "Configuring Webchat and Qlik Sense Extension".
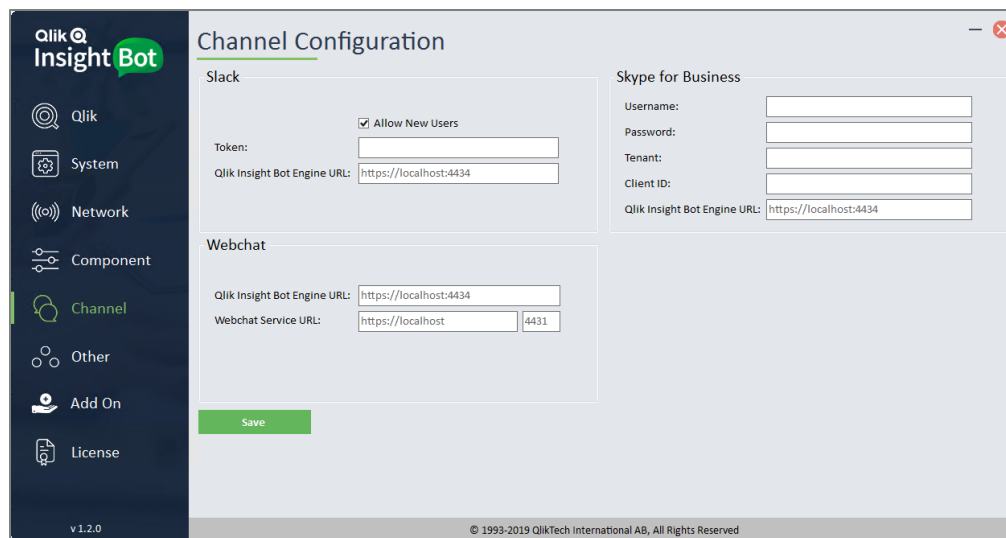
9. From **Other** Configuration tab you can configure the following.

   Filter

   If Auto Clear is set, Qlik Insight Bot will remove any applied filters, context and currently selection application after the minutes you have set in **Clear Filter Time** if the user seats idle for that time period.

   Auto Convert

   Money – This will show the amount in symbolic form, i.e $100000 will be shown as $1M.
   Number – This will show the amount in symbolic form, i.e 10000 will be shown as 10K.

   App Object

   Disable chart creation in Qlik Sense application by checking the box. A Qlik Sense chart will not be created and hence, the chart link will not be generated. This won't change the response of the query.

   Qlik Sense application object created by Qlik Insight Bot will be deleted automatically after configured day(s) for Delete Sheet Time.

   e.g. If the "Delete Sheet Time" is set to "1", all sheets created by Qlik Insight Bot will be deleted after 1 day.

   Timezone

   Qlik Insight Bot will consider the time zone you have set from this section while giving any response to the user.
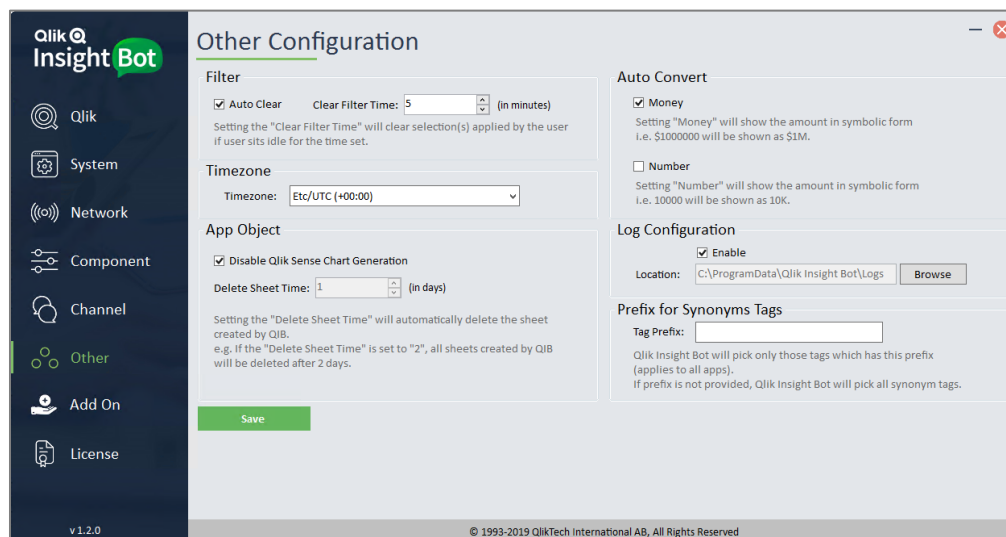
   Log Configuration

You can enable the Qlik Insight Bot question logging feature by enabling the Log Configuration. This will store the questions asked by users in a log file.

Select path for storing the Qlik Insight Bot questions log file, which is "C:\ProgramData\Qlik Insight Bot\Logs" by default.

Note: Make sure that IIS_IUSRS has read/write permission to the selected folder.

Prefix for Synonyms Tags

Qlik Insight Bot consumes tags added into Master Items. It may be possible that there are few tags which are already added into master items and you don't want to consider them for Qlik Insight Bot. In this case, you can configure that prefix in the Configuration Application and add tags with any prefix. So, Qlik Insight Bot will pick up only those tags which has this prefix added. If prefix is not added, it will pick all available tags from master items. Ex. If you want to pick tag with prefix **QIB_,** you simply add prefix **QIB_** in configuration application and tag can be **QIB_Cities** for the master dimension **City**.

Please note that the configuration for prefix is applied to all the application.

10. From **Add On** tab you can download the Qlik Sense Extension and Webchat for Qlik Sense Hub.

    a. For **Qlik Sense Extension**, click **Download.** Also, you need to configure the web chat from the channel configuration tab.

        (QIB - Configuring Webchat and Qlik Sense Extension)

    b. For **Webchat for Qlik Sense Hub**, select appropriate Qlik Sense version, click **Download**. Also, you need to configure the web chat from the channel configuration tab.

        (QIB - Configuring Webchat and Qlik Sense Extension)

        Note: If you make any changes in the Qlik Insight Bot Configuration application for webchat channel, you are required to re-download and re-configure the Qlik Sense Extension and Webchat for Qlik Sense Hub.
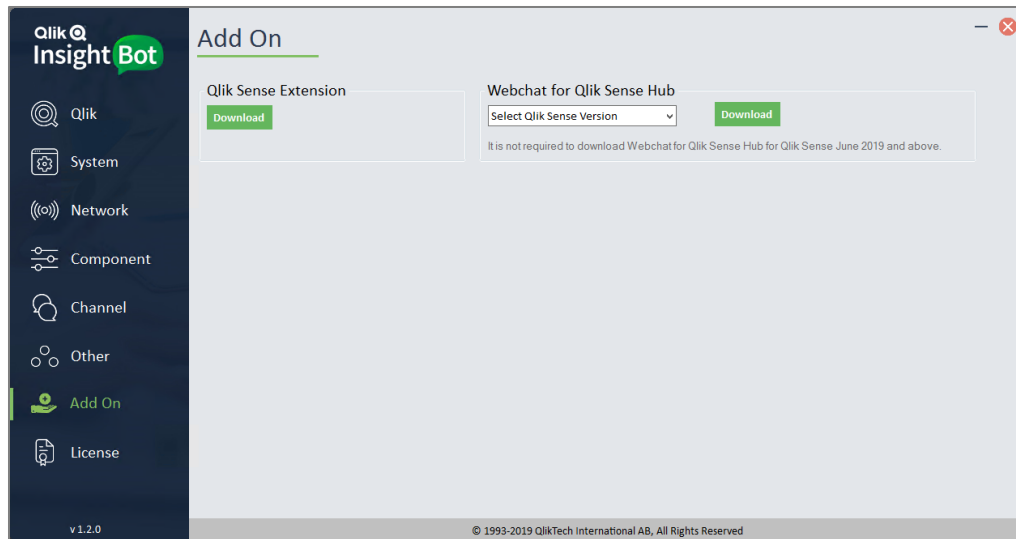
11. The **License** section shows the license detail.

If your license information (License Expiration Information) has been updated by Qlik™ and to reflect those changes on Qlik Insight Bot, click **Update License** button. All Qlik Insight Bot Services need to be restarted in order to reflect those change.
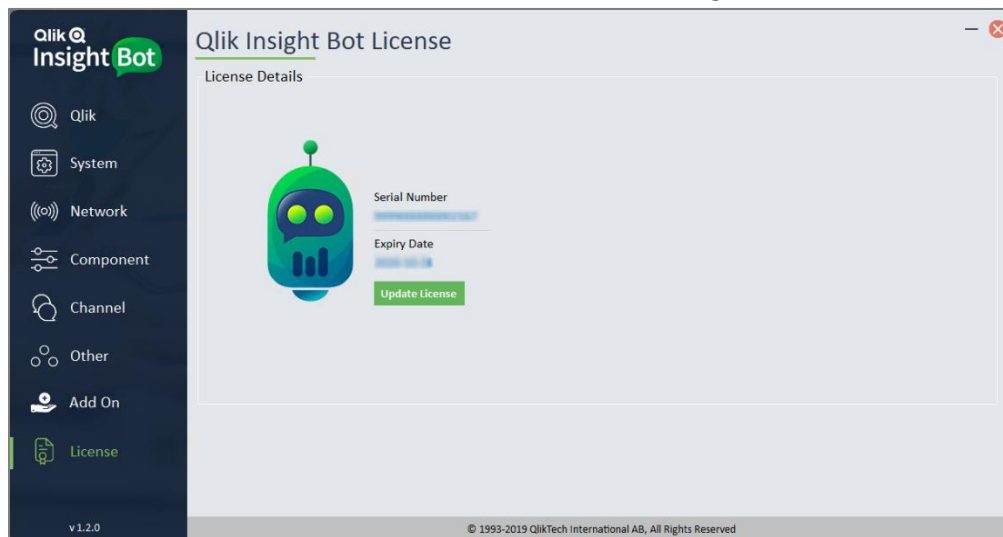
Qlik Insight Bot should now be configured.

## Install and configure Qlik Insight Bot Services

Execute the setup file in administrator mode. Once finished successfully, you should have –

- Web services
    - Qlik Insight Bot Engine Service
    - Qlik Insight Bot Management Service
    - Qlik Insight Bot NLP Service
- Windows Service
    - Qlik Insight Bot Deployment Engine Service

After installing Qlik Insight Bot Services you need to configure above Web services. Below are the steps to do the same.

Configure Qlik Insight Bot Engine Service

1. Open **IIS Manager**.
2. Select **engineservice** under **sites** on left pane, click **Bindings** under **Edit Site** on right pane.
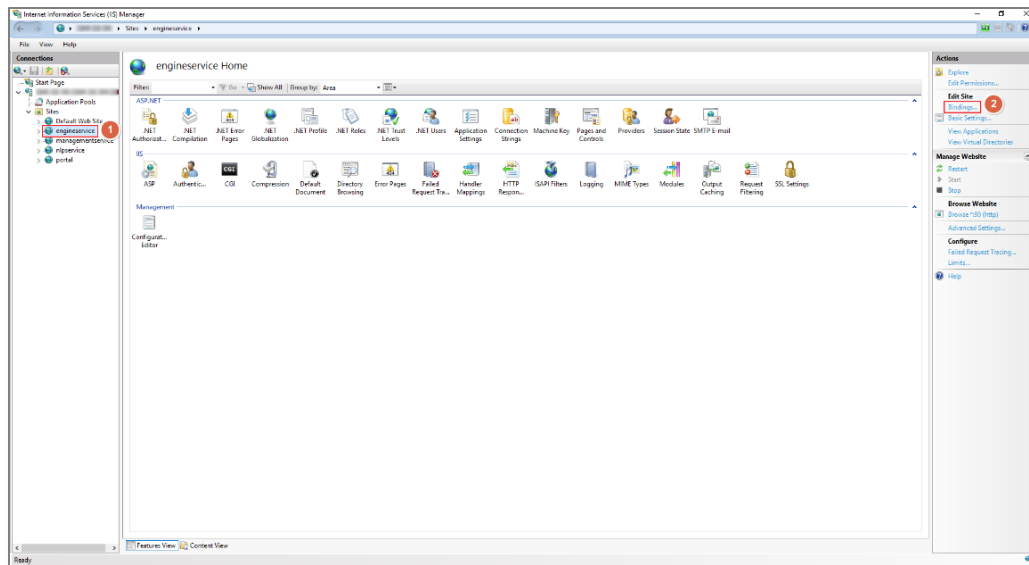
3. Click **Add…**
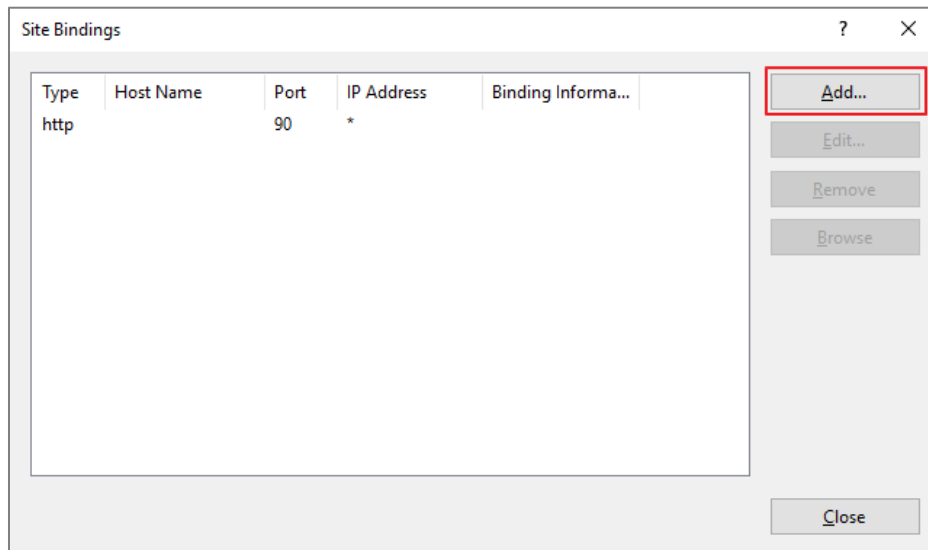
4. Enter below details, click **OK**.

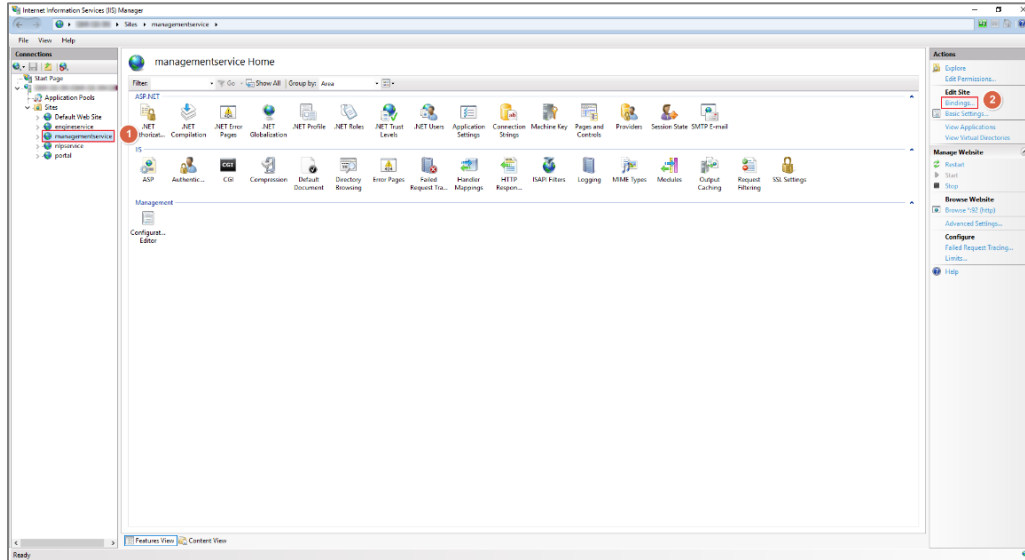| Type	Select https
Port	Enter **4434**
SSL Certificate	Select Your SSL certificate from drop down menu.
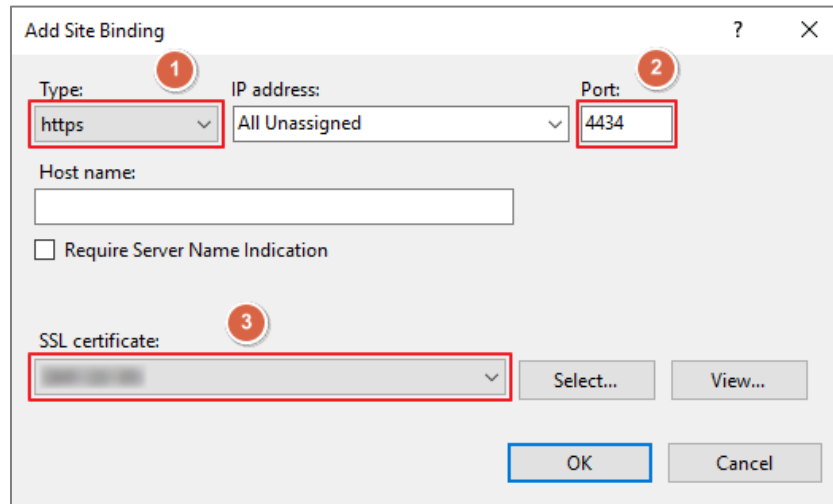
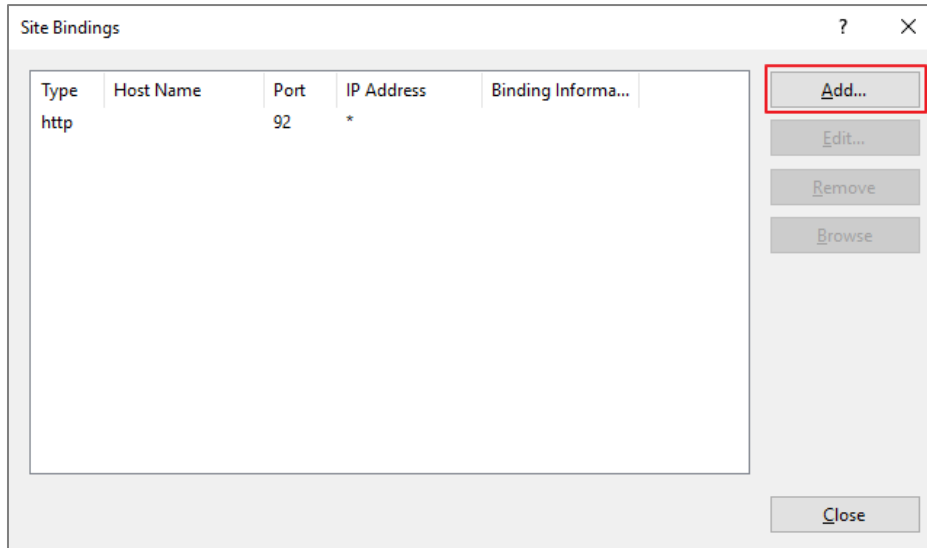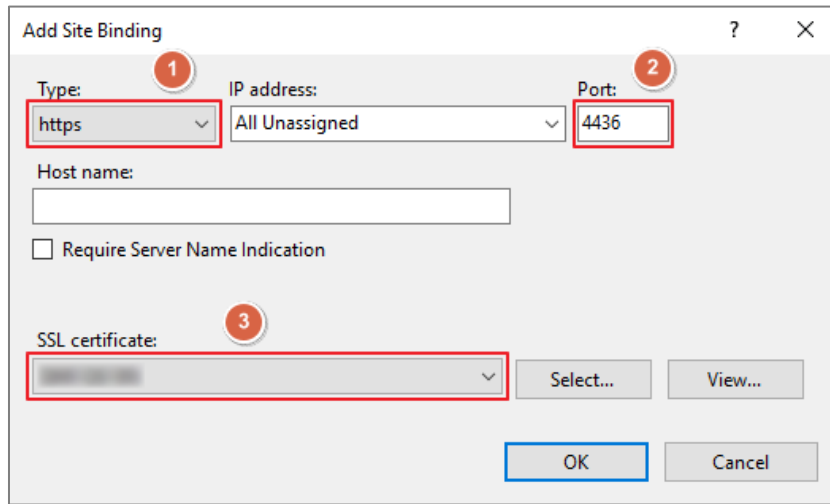5. Select other Binding, click **Remove**.
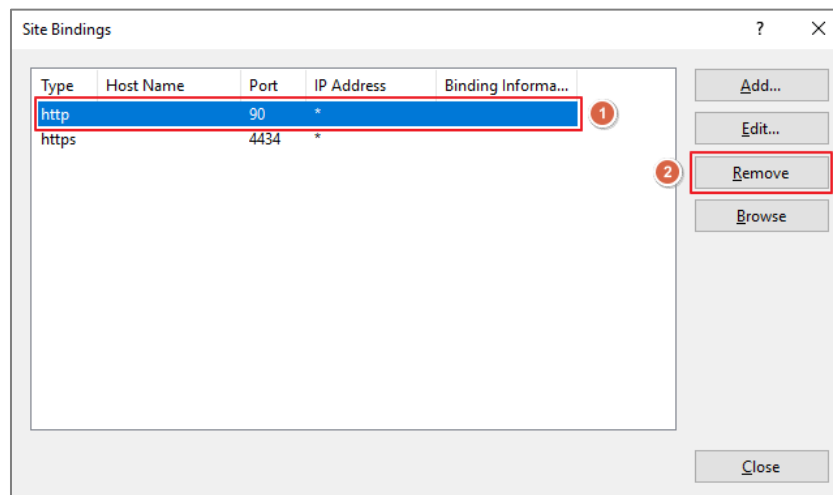
6. After changing the port of Qlik Insight Bot Engine Service, you need to check that the service is running or not by hitting **https://<servername>:4434** in the web browser.

Configure Qlik Insight Bot Management Service

1. Select **managementservice** under **sites** on left pane, click **Bindings** under **Edit Site** on right pane.
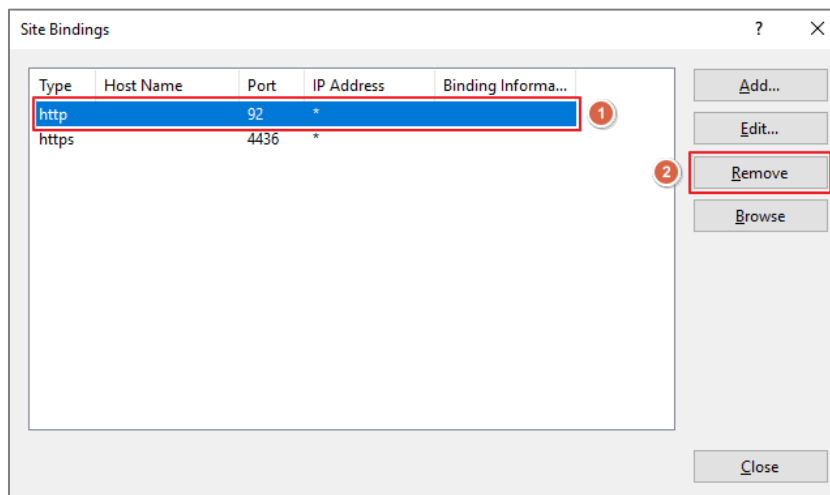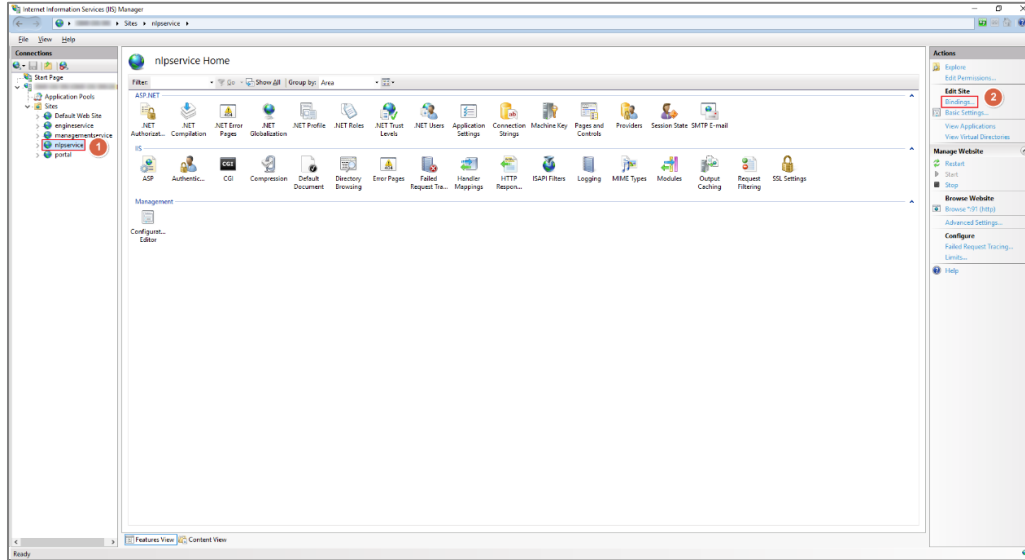

2. Click **Add…**

3. Enter below details, click **OK**.

Type	Select **https**
Port	Enter **4436**
SSL Certificate	Select Your SSL certificate from drop down menu.

4. Select other Binding, click **Remove**.

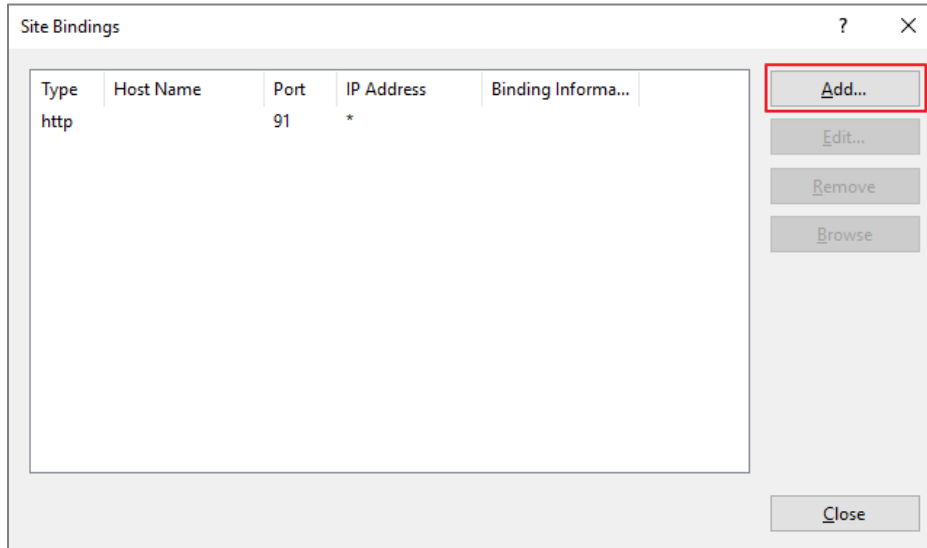5. After changing the port of Qlik Insight Bot Management Service, you need to check that the service is running or not by hitting **https://<servername>:4436** in the web browser.

Configure Qlik Insight Bot NLP Service

1. Select **nlpservice** under **sites** on left pane, click **Bindings** under **Edit Site** on right pane.

2. Click **Add…**

3. Enter below details, click **OK**.

Type	Select **https**
Port	Enter **4437**
SSL Certificate	Select Your SSL certificate from drop down menu.

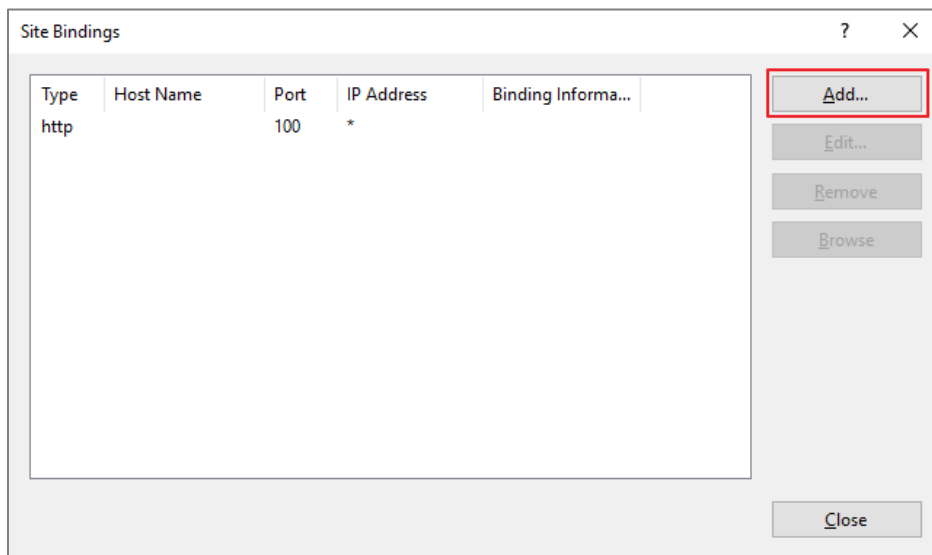4. Select other Binding, click **Remove**.

5. After changing the port of Qlik Insight Bot NLP Service, you need to check that the service is running or not by hitting **https://<servername>:4437** in the web browser.

Configure the Portal

1. Open **IIS Manager**.
2. Select **portal** under **sites** on left pane, click **Bindings** under **Edit Site** on right pane.
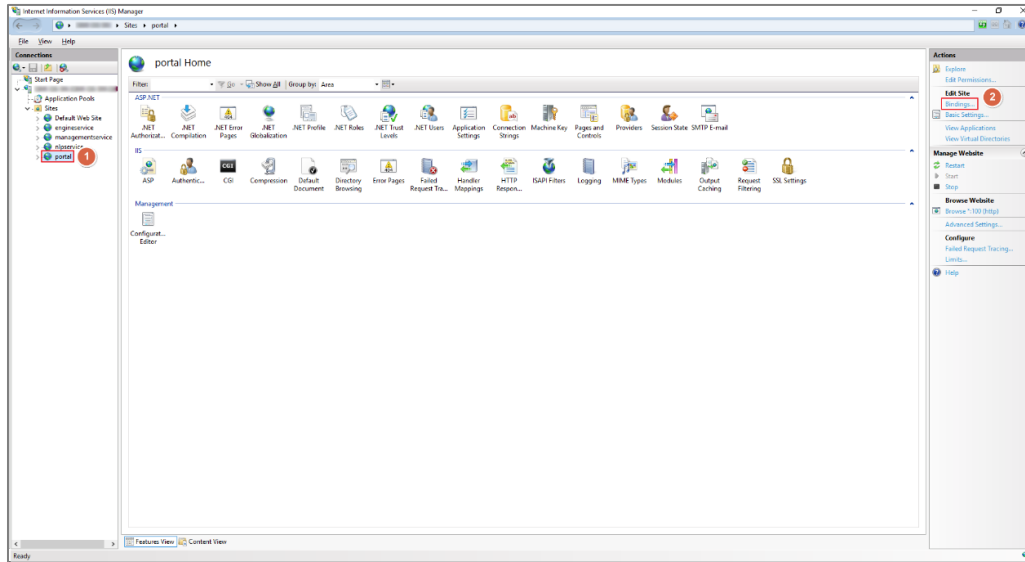
3. Click **Add…**

4. Enter below details, click **OK**.

Type	Select **https**
Port	Enter **4435**
SSL Certificate	Select Your SSL certificate from drop down menu.

5. Select other Binding, click **Remove**.

6. After changing the port of Qlik Insight Bot NLP Service, you need to check that the service is running or not by hitting **https://<servername>:4435** in the web browser and login using the creds which were used in Qlik Insight Bot Configuration Application.

Tip: Best viewed and experienced in Google Chrome.

Install Qlik Insight Bot Narrative service

Execute the setup file in Administrator mode.

Once finished successfully, open windows service and check that Qlik Insight Bot Narrative Service is running. If not, start it.

Install Qlik Insight Bot Webchat service

If you want to use Qlik Insight Bot as a Qlik Sense Hub Chat or as a Qlik Sense Extension, execute the **Qlik Insight Bot Webchat Service** setup file in Administrator mode.

Install Qlik Insight Bot Slack Engine service

If you want to use Qlik Insight Bot in Slack (if no Azure Bot is created for Slack channel), execute the **Qlik Insight Bot Slack Engine Service** setup file in Administrator mode.

Install Qlik Insight Bot SFB Online service

If you want to use Qlik Insight Bot in Skype for Business Online (if no Azure Bot is created for SFB Online channel), execute the **Qlik Insight Bot SFB Online Service** setup file in Administrator mode.

Now, Qlik Insight Bot is installed, and services are configured.

## Appendix I – Mapping Qlik Sense node host name with its IP address

1. Go to QMC > CONFIGURE SYSTEM > Nodes.
2. Copy the host name of a Central node (column "Host name").
3. Go to *"C:\Windows\System32\drivers\etc".*
4. Open the Host file in text editor in administrator mode.
5. Reach to end of the document and put Qlik Sense Server node IP address along with its host name.
6. Save and close.

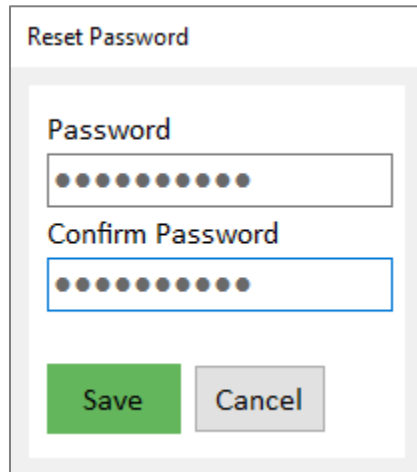## Appendix II – Getting port of PostgreSQL

1. Open **pgAdmin**.
2. Right click **PostgreSQL 11** server, select **Properties**.
3. Go to **Connection** tab.
4. Copy the port.

Appendix III – Change Password of Configuration Application/ Management Console

1. If you lost the password for login or you want to change it, launch the Qlik Insight Bot Configuration application.
2. Click **Change Password**.
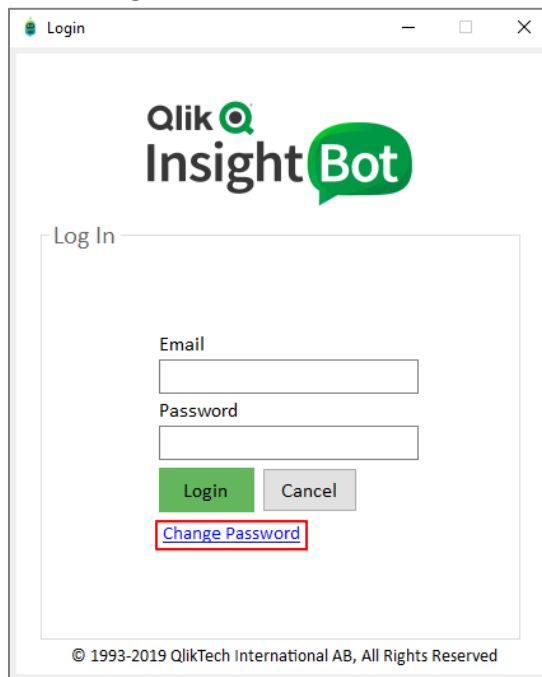
3. Enter new **Password**, click **Save**. A password must be at least 8 characters including 1 number and 1 special character.

Reset Password

Password

●●●●●●●●●●

Confirm Password

●●●●●●●●●●

Save   Cancel

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