

QLIK INSIGHT BOT PORTAL

A COMPREHENSIVE GUIDE



Qlik 
Insight  Bot

Qlik Insight Bot™

November 2019

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Introduction

Qlik Insight Bot Portal is designed with the purpose to provide one stop solution to configure and manage apps and users for Qlik Insight Bot. It enables customers to manage Qlik Sense application(s) for Qlik Insight Bot as well managing users and their access to Qlik Insight Bot. Other than that, it also provides other configuration options and settings which will help customers improve the control and administration of Qlik Insight Bot.

Qlik Insight Bot Management Console can be accessed using <https://localhost:4435> on the server. Credentials are the same as used for Configuration Application.

To summarize, with Qlik Insight Bot portal, a user can –

- Manage apps
 - Train the bot
 - Load/refresh the metadata
 - Undeploy apps
 - Sync apps
- Configure apps
 - Choose only required dimensions and/or measures to be deployed.
 - Add tags (as synonyms) for chosen dimensions and/or measures.
 - Associate Date fields for specific measures.
 - Create Measure-Dimension(s) mappings to improve analytics.
 - Create rules using Rule Engine to customize the answer.
- Manage users
 - Manage Users and their Access to Qlik Insight Bot.
- Schedule a task
 - Create a task to schedule a bot training.

Tip: Best viewed and experienced in Google Chrome.

Qlik Sense applications

User will see the list of all Qlik Sense apps of the stream(s) user have configured in Qlik Insight Bot Configuration application. From this portal, a user can sync the apps, load/reload the metadata, train the bot or undeploy any app. Qlik Insight Bot will answer only for the apps which have been trained from the portal.

Sync

If user has published/unpublished any application(s) in the configured stream on Qlik Sense server, that list of application(s) will not be updated to the portal automatically. Click **Sync** to update the app list.

Applications










Application Name	Stream	Last Activity Date	Last Activity Status	Metadata Status	Status
Financial Tables 48630291-1360-4909-6804-03050c0501 Pushed values: 208	Everyone	8/30/2019 2:36:19 PM	NLU Updated		
Financial Calendar 23226774960-4001-8978-df02c0d497 Pushed values: 123	Everyone	8/30/2019 2:24:21 PM	Loaded		
Financial Calendar - Qlik Sense c70006a-8030-4306-82155901620016 Pushed values: 3,21K	Everyone	8/30/2019 1:00:15 PM	NLU Updated		
Financial Calendar Qlik Tool e870566-1344-4849-6014-50860038585	Everyone	8/14/2019 4:30:47 PM	Undeployed		
Financial Manager - Applications 7c15c31b-7110-4167-6265-385206ca360b Pushed values: 62,22K	Everyone	8/30/2019 1:35:00 PM	NLU Updated		
Qlik Sense Applications e630819b-2549-4201-6642-461115d0265	Everyone	8/30/2019 3:47:49 PM	NLU Updated		
Operational Analytics - Tables 654ef6c3-210-4087-8609-28620ca5686	Everyone	-	-		
Operational Tables - Tables 96c3a99f-c054-4548-a064-af9488014036 Pushed values: 4.4K	Everyone	8/30/2019 3:48:49 PM	NLU Updated		
Table Relationshiping - Operational Tables - Qlik Sense c0e60ba2-2c0a-4e47-8c35-0820c0f60c27	Everyone	-	-		
Table - Tables 4861008d-6a4a-4578-6a44-39e080e021c	Everyone	-	-		
Operational Tables - Tables 4ec1008a-c054-4548-a064-af9488014036 Pushed values: 4.4K	Everyone	8/30/2019 3:48:49 PM	NLU Updated		

- Application Name**
Application name of published applications in the configured stream(s).
- Stream**
Display the Stream name of an application in which application is published.
- Modified Date**
Date on which any operations like modification in synonyms of dimension(s)/measures(s) or mappings, load/reload metadata are performed on an application.
- Metadata Status**
 - If the data of an application are yet to pulled from Qlik Sense to local repository.
 - If the data of an application are successfully pulled from Qlik Sense to local repository.
- Push Status**
 - If the data of an application are yet to pushed from local repository to NLU.
 - If the data of an application are successfully pushed from local repository to NLU.

- **Last Activity Status**

Queued - <task>	Application is queued to perform a task.
Loading	Metadata is being loaded from the Qlik Sense Application.
NLU Updating	Metadata is being updated to NLU for the application.
Reloading	Metadata of an application is reloading from the Qlik Sense Application.
Reloading (Triggered)	Metadata of an application is reloading automatically on Qlik Sense Application reload.
Undeploying	Application is being undeployed from Bot
Unloading	Metadata is being removing from the QIB storage
Loaded	Metadata loaded successfully from QS app.
NLU Updated	Metadata is updated in NLU successfully for requested app
Reloaded	Metadata of an application reloaded successfully from QS app.
Reloaded (Triggered)	Metadata of an application reloaded automatically successfully from QS app.
Undeployed	Application undeployed successfully from the QIB.
Unloaded	Metadata unloaded successfully from QIB.
Load Failed	Metadata loading from QS app has been failed.
NLU Update Failed	Metadata update to NLU has been failed.
Reload Failed	Metadata reload has been failed.
Reload Failed (Triggered)	Automatically reload of metadata has been failed.
Undeploy Failed	Application undeployment has been failed.
Unload Failed	Metadata removing from QIB storage has been failed

- **Portal Controls**

-  Load metadata of an application.
-  Reload metadata of an application.
-  Push metadata of an application to update NLU.
-  Un-deploy an application.
-  Backup metadata of an application.
-  Restore metadata of an application.
-  Refresh application list.
-  Sync the application list with configured Qlik Sense server.
-  Train bot only for those application of which metadata has been pushed successfully.

Load metadata of an application

Qlik Insight Bot stores the details of all measures and dimensions as a metadata, which will help Qlik Insight Bot to understand the questions better. The metadata must be loaded before training the bot. User can also add (or remove) synonyms of measure(s) or dimension(s). Adding the synonyms helps Qlik Insight Bot to identify the right measure/dimension whenever user asks questions. Also, user can add mappings of measure-dimensions after loading the metadata.

Click  to load the metadata of an application.

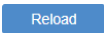

User can view and manage dimensions/measures/mappings of an application. Click the application name, once the metadata of the application has been loaded successfully.

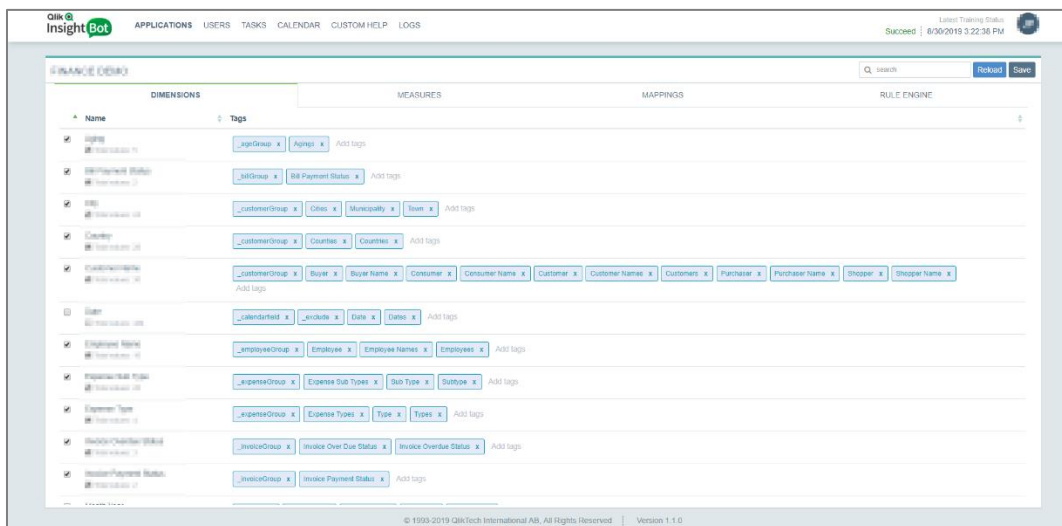
Dimensions

User can add tags which will act as a synonym of a dimension while doing conversation with Qlik Insight Bot. Adding more relevant synonyms will help Qlik Insight Bot to understand user request more efficiently.

E.g. the end user may refer Sales Person as Agent, Sales Rep, Sales Representative, or Salesman etc.

User can also exclude/include dimension(s) or dimension values using check boxes. Excluding dimension will not push dimension and its values as well and excluding dimension values will push dimension only i.e. it will not push dimension values.

If any new dimension(s) are added to the Qlik Sense application after the metadata has already been loaded on Portal, user can have them on the list by reloading the dimensions list. Click  to load newly added dimension(s) to the list. Save the changes by clicking .



The screenshot shows the Qlik Insight Bot Portal interface for the 'FINANCE DEBIT' application. The 'DIMENSIONS' tab is active, displaying a list of dimensions and their associated tags. The dimensions listed are:

- Agent**: Tags include _AgentGroup, Agent, and Add tags.
- Payment Status**: Tags include _PMGroup, PM Payment Status, and Add tags.
- City**: Tags include _CustomerGroup, City, Municipality, and State, with an 'Add tags' button.
- Country**: Tags include _CustomerGroup, Country, and Country, with an 'Add tags' button.
- Customer Name**: Tags include _CustomerGroup, Buyer, Buyer Name, Consumer, Consumer Name, Customer, Customer Name, Customer, Purchaser, Purchaser Name, Shopper, and Shopper Name, with an 'Add tags' button.
- Date**: Tags include _Calendar, _Exclude, Date, and Date, with an 'Add tags' button.
- Employee Name**: Tags include _EmployeeGroup, Employee, Employee Name, and Employee, with an 'Add tags' button.
- Expense Sub Type**: Tags include _ExpenseGroup, Expense Sub Types, Sub Type, and Subtype, with an 'Add tags' button.
- Expense Type**: Tags include _ExpenseGroup, Expense Types, Type, and Types, with an 'Add tags' button.
- Invoice Over Due Status**: Tags include _InvoiceGroup, Invoice Over Due Status, and Invoice Overdue Status, with an 'Add tags' button.
- Invoice Payment Status**: Tags include _InvoiceGroup, Invoice Payment Status, and Add tags.

The interface also includes a search bar, 'Reload' and 'Save' buttons, and a footer with the copyright notice: © 1993-2019 QlikTech International AB. All Rights Reserved | Version 1.1.0.

Measures

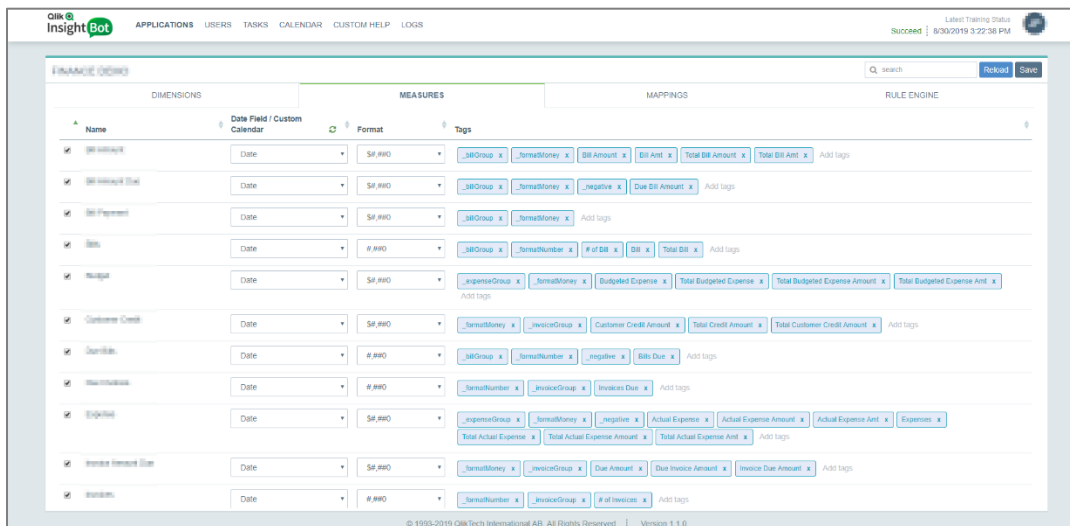
User can add tags which will act as a synonym of that measure while doing conversation with Qlik Insight Bot. Adding more relevant synonyms will help Qlik Insight Bot to understand user request more efficiently.

E.g. the end user may refer Total Employees as Headcount, Employee count, Employees, Users etc.

For each measure, you can associate a separate date field. The default date field will be the date field for which there has been added “_calendarfield” tag. This will help Qlik Insight Bot to apply filter on correct date field. E.g. For a measure “Total Leads”, you may associate it with the date field “Lead Created Date” while “Total Oppty” may associated with “Oppty Created Date”.

Format will help Qlik Insight Bot to display value of Measure in a proper and desired format. User can also exclude/include measures(s) using check boxes.

If any new measure(s) are been added to the Qlik Sense application after the metadata has already been loaded on Portal, user can have them on the list by reloading the measures list. Click [Reload](#) to load newly added measure(s) to the list. Save the changes by clicking [Save](#)



Below is the list of supported formats for measure by Qlik Insight Bot.


Money	Number	Percent
\$#,##0	#,##0	#,##0%
\$#,##0.0	#,##0.0	#,##0.0%
\$#,##0.00	#,##0.00	#,##0.00%
\$#,##0;(\$#,##0)		#,##0%;(#,##0%)
\$#,##0.0;(\$#,##0.0)		#,##0.0%;(#,##0.0%)
\$#,##0.00;(\$#,##0.00)		#,##0.00%;(#,##0.00%)
£#,##0		
£#,##0.0		
£#,##0.00		
£#,##0;(£#,##0)		
£#,##0.0;(£#,##0.0)		
£#,##0.00;(£#,##0.00)		

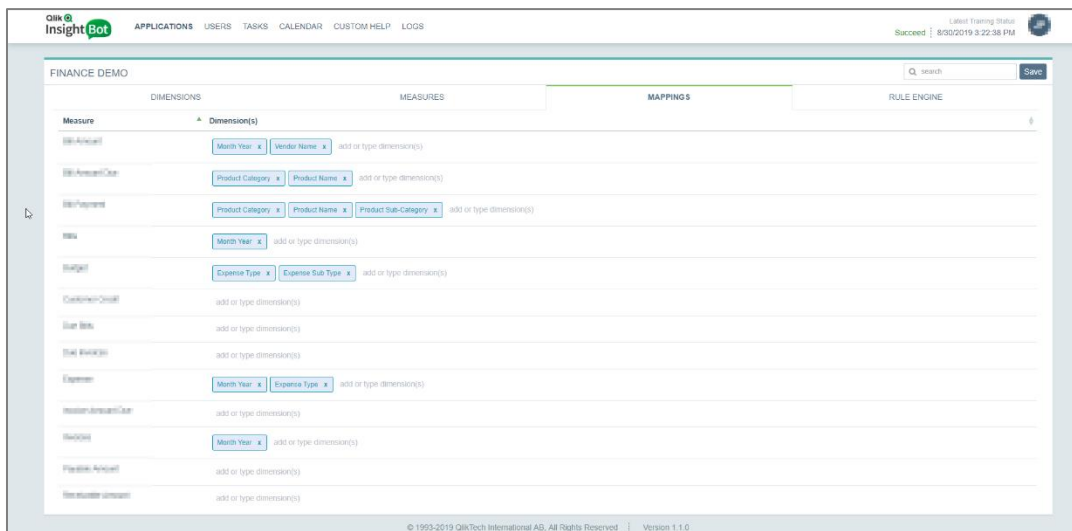
Mappings

Mappings are measure-dimension(s) pair which performs a key role in generating advanced narratives, showing surprising facts around a measure/dimension and to suggest relevant measures according the user question.

When user loads an app, several mappings will be generated automatically based on the charts available in QS app.

E.g. let's assume the QS app has two charts - 1) Sales by City 2) sales by Product. Hence, the resultant mappings will be 1) Sales-City 2) Sales-Product.

User can generate such more mappings from the MAPPINGS tab. Save all changes by clicking .



Rule Engine

With the help of the Rule Engine user can create tailored responses. User can create different types of rules by why user can have total control on the responses Qlik Insight Bot going serve to the other users of user's organization.

The screenshot displays the Qlik Insight Bot Rule Engine interface. At the top, there are navigation tabs: APPLICATIONS, USERS, TASKS, CALENDAR, CUSTOM HELP, and LOGS. The main content area is titled 'FINANCE DEMO' and contains a table of rules. The table has columns for Rule ID, Rule, Custom Answer, Chart Type, Chart Measure, Chart Dimension, Allow Keywords, and Allow Periods. The 'RULE ENGINE' tab is active, and the 'Add Rule' button is visible in the top right corner. The table contains five rules, each with a unique ID and a custom answer. The footer of the interface shows the copyright information: © 1993-2019 QlikTech International AB, All Rights Reserved | Version 1.1.1.

Create a Rule

1. Click **Add Rule** button on the top right corner. Select the type of rule you want to set, which are as below -
 - a. Limit
 - b. Measures
 - c. Dimensions
 - d. Filter Dimensions

The screenshot shows the 'Add Rule' dialog box. The 'Type' dropdown menu is open, displaying the following options: Select type, Limit, Measures, Dimensions, and Filter Dimension. The 'Save' and 'Cancel' buttons are visible at the bottom right of the dialog box.

2. After selecting the type, click **+** to set custom answer and other conditions. You can set the custom answer text in the textbox provided. The custom answer will contain two types of text -
 - a) A dynamic text e.g. the measure value, dimension value or a filter value etc.
 - b) A static text which will form the rest of the statement.

Adding a dynamic text to the response requires a certain syntax to be followed, as shown in a table below.

Syntax	Description
@[Measure]	To display Measure value. E.g. Here is the total sales @[Total Sales].
#[Dimension]	To display Dimension value. You can use list to display dimension value in a list format. E.g. Categories wise Orders: <list>#[Category] - @[Orders]</list>
.[Dimension Value]	To get a response of a measure for particular value of a dimension. E.g. Total sales of New York is @[Total Sales]#[City].[New York] Note: “. [Dimension Value]” must be preceded by “[Dimension].”
.[Time Period]	To get a response of a measure by a time period. E.g. Sales for current year is @[Total Sales].[Current Year]. Note: “. [Time Period] must be preceded by @[Measure]”.
\$FilterValue	To get a response for a particular dimension value. E.g. For \$FilterValue, Total Sales is @[Total Sales] and Gross Margin is @[Gross Margin].
<list>.....</list>	To display values as a list. e.g. Sales by Store: <list> @[Sales]- #[Store]</list>
Break Line (Enter)	To add line break.

Note: All Keywords are case sensitive. Use the Tab key to change Dimension or Measure name after typing @[or #[.

Measures rule

If you require Qlik Insight Bot to give a tailor-made response when a question regarding a specific measure is asked, you need to set a Measure rule. Along with tailor-made message, you can also add a specific type of chart i.e. bar chart, pie chart etc. to the response, having a measure and a dimension of importance.

E.g. When you ask about “sales” and in a response you want Qlik Insight Bot to provide a custom message containing sales and expense. Also, you want to show a line chart of sales by month year.

Add Rule

Type: Measures = Measures

Measures: Select measure = Sales

Custom Answer: Here is the total sales @[Sales] and total expense is @[Expense].

Syntax: @[Measure], #[Dimension], [Dimension Value], [Time Period], \$FilterValue, <list> .</list>, Enter - Break Line
All keywords are case sensitive. Use the Tab key to change Dimension / Measure / Time Period after typing @[or #[or [

Add Chart: Line Chart, Sales, Month Year

Buttons: Save, Cancel

Now, whenever any user will ask regarding the “sales”, bot should respond with a custom answer.

Insight Bot

Sales: \$705,550.00
Receivable Amount: \$288,129.67
Received Amount: \$389,677.33
Invoice Amount Due: \$315,875.67

Show Measures Show Dimensions

show me total sales

Here is the total sales \$705.55K and total expense \$131.17K.

I have prepared a chart of Sales by Month Year that could be useful to you.
Here you go - Sales by Month Year

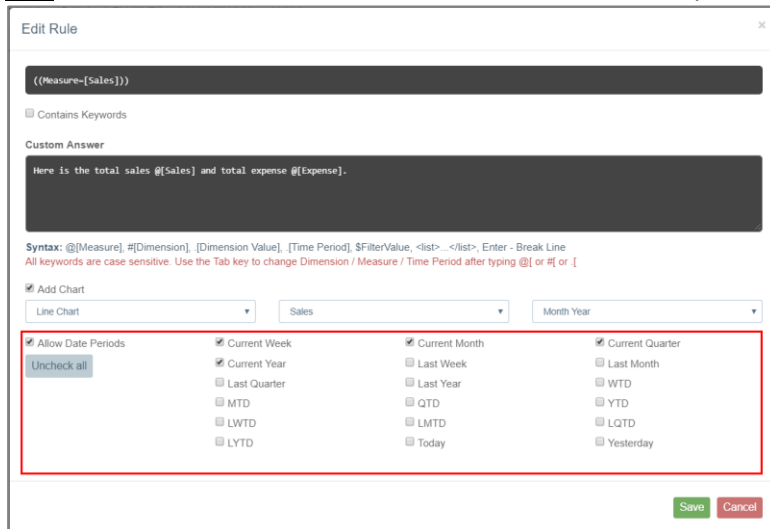
Type a message...

Adding Date Periods for custom answers

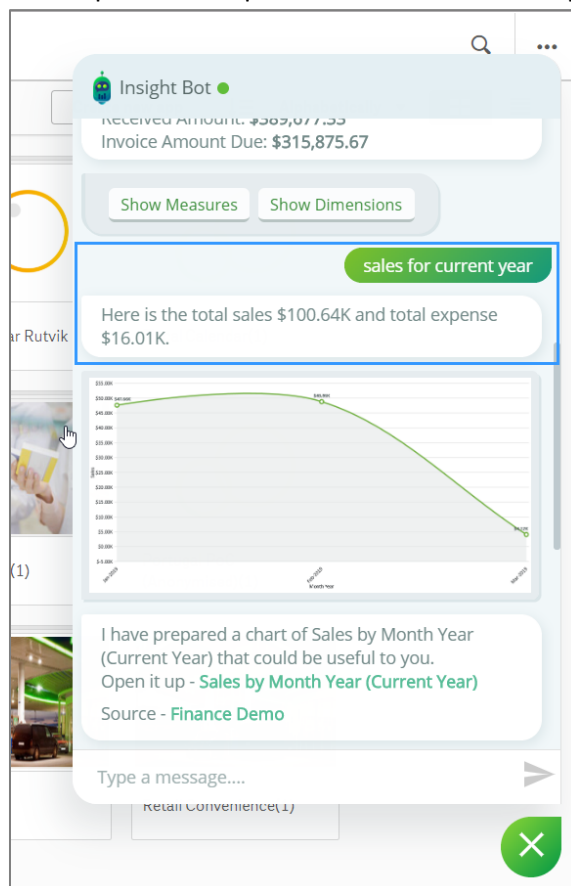
What if you want to bind a measure to some selected date periods i.e. Last Quarter, MTD, Today etc.? Meaning, you want Qlik Insight Bot to provide a custom answer to the user only when user asks about a measure for a particular date period.

Qlik Insight Bot’s Rule Engine allows you to set specific date periods for any type of rule. To do so, check “Allow Date Periods” and select the period(s) of your choice.

E.g. You want a custom answer for a sales for current date periods only and no other date periods.



The response for a question with allowed date period –



The response for a question with other date period –

The screenshot shows a chat window with the following content:

- Header: Insight Bot
- Search bar: sales for last year
- Text message: Sales is \$604.92K for last year
- Line chart: Sales by Month Year (Last Year). The chart shows monthly sales data for the last year, with values ranging from approximately \$180,000 to \$600,000. The x-axis is labeled 'Month Year' and the y-axis is labeled with sales amounts.
- Text message: I have prepared a chart of Sales by Month Year (Last Year) that could be useful to you. Here you go - [Sales by Month Year \(Last Year\)](#) Source - [Finance Demo](#)
- Text message: You may also be interested in:
- Buttons: YoY, QoQ, MoM
- Input field: Type a message...
- Footer: Retail Convenience (1)

Month Year	Sales (\$K)
Jan-2018	580.00
Feb-2018	250.00
Mar-2018	180.00
Apr-2018	580.00
May-2018	250.00
Jun-2018	180.00
Jul-2018	580.00
Aug-2018	250.00
Sep-2018	180.00
Oct-2018	580.00
Nov-2018	250.00
Dec-2018	180.00

Setting a custom answer for targeted Keyword(s)

You have seen how you can leverage the capabilities of the Rule Engine to set custom answers. What if you want to get a custom answer for measure (or any other rule type) when you ask about it with a combination of a specific keyword?

E.g. Tell me the **sales summary**. Here, “sales” is a measure and “summary” is keyword.

The screenshot shows the 'Edit Rule' configuration window. At the top, the rule is defined as `((Measure=[Sales]))`. Below this, the 'Contains Keywords' section is highlighted with a red box, showing a text input field containing the keyword 'summary'. Underneath, the 'Custom Answer' field contains the text: 'Here is the total sales @[Sales] and total expense @[Expense]'. Below the custom answer, there is a 'Syntax' section with the following text: '@[Measure], #[Dimension], [Dimension Value], [Time Period], \$FilterValue, <list>...</list>, Enter - Break Line. All keywords are case sensitive. Use the Tab key to change Dimension / Measure / Time Period after typing @[or # or [. The 'Add Chart' section is also visible, showing a line chart for 'Sales' by 'Month Year' with various time period filters.

To which the bot will respond –

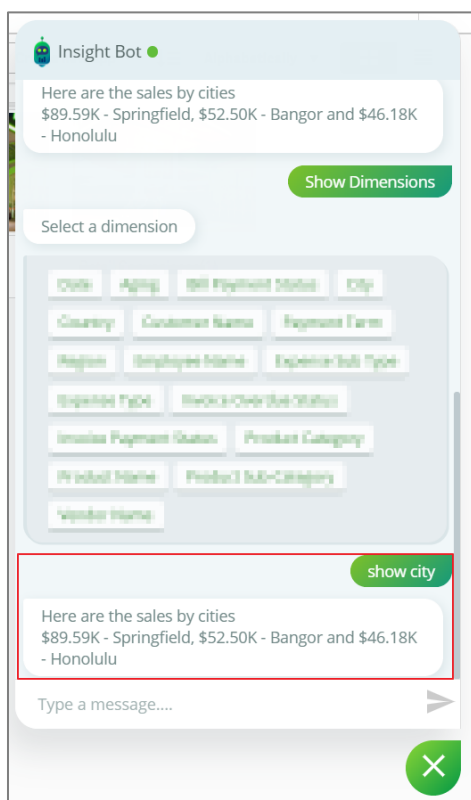
The screenshot shows the Qlik Insight Bot chat interface. The bot has responded to a query with a 'sales summary' card. The card contains the text: 'Here is the total sales \$705.55K and total expense \$131.17K.' Below the text is a line chart showing sales data over time. The bot also offers a link to 'Sales by Month Year' and mentions the source is 'Finance Demo'.

Dimensions rule

The dimension type rule works same as a measure rule. Set the dimension rule when you want a custom-made answer from the bot specific to a dimension.

E.g. You want to see sales by cities only by saying the dimension name (city) and nothing else. The rule would be –

The bot should respond like this upon asking about category -



Filter Dimensions rule

Set the Filter Dimension rule when you want a custom answer for a dimension value against any measure.

E.g. You want the bot to show sales, expense and budget details based on the dimension value.

Add Rule
✕

Type	Dimensions	Action
Filter Dimension	Select dimension	+
FilterOnDimension	Country	-

```
((FilterOnDimension=[Country]))
```

Contains Keywords

Custom Answer

```
Details for $FilterValue -
Total Sales: @[Sales]
Total Expense: @[Expense]
Total Budget: @[Budget]
```

Syntax: @[Measure], #[Dimension], [Dimension Value], [Time Period], \$FilterValue, <list>...</list>, Enter - Break Line
 All keywords are case sensitive. Use the Tab key to change Dimension / Measure / Time Period after typing @[or #[or [

Add Chart

Select chart type

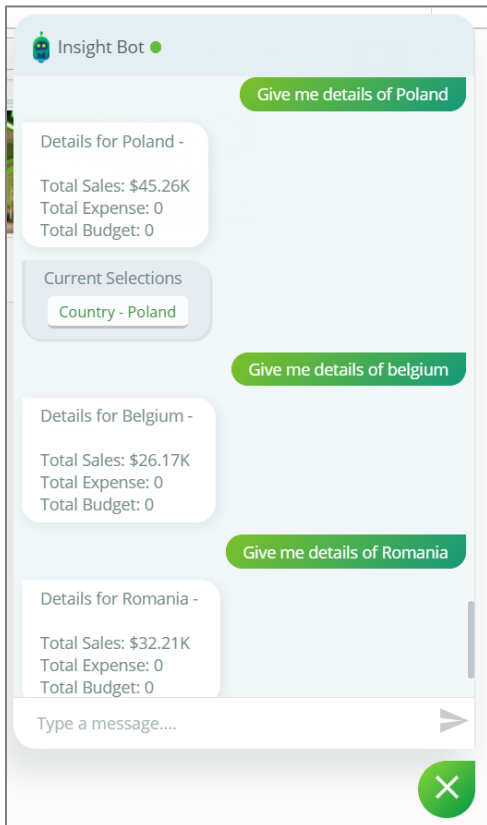
Select measure

Select dimension

Allow Date Periods

Save
Cancel

Below should be the response when a user will ask about Tobacco detail –



Limit rule

Set the Limit rule whenever you want a custom answer for questions asking for a top or bottom list. i.e. Show me top states by sales. The limit rule must include at least one measure or dimension.

E.g. When user asks about top products, you want the bot to reply with top products by sales.

Add Rule
✕

Type		Dimensions		Action
Dimensions	=	Select dimension		+
Limit	=	Top		-
AND		Dimension	=	Product Name

`((Limit=[Top] AND Dimension=[Product Name]))`

Contains Keywords

Custom Answer

Top Products by Sales -
 <list>#[Product Name]: @[Sales]</list>

Syntax: @[Measure], #[Dimension], [Dimension Value], [Time Period], \$FilterValue, <list>...</list>, Enter - Break Line
 All keywords are case sensitive. Use the Tab key to change Dimension / Measure / Time Period after typing @| or #| or |

Add Chart

Select chart type
Select measure
Select dimension

Allow Date Periods

Save
Cancel

When you ask let's say Top products by sales, the output would be –

Insight Bot ●

\$32.22K

I have prepared a chart of Sales by Product Name that could be useful to you.
 Here you go - [Sales by Product Name](#)
 Source -

Invoices


Show me top products

Top Products by Sales -
 Xerox 1967: \$42.72K, Chromcraft Rectangular Conference Tables: \$38.69K and Bretford CR4500 Series Slim Rectangular Table: \$34.60K

Type a message... ➤

✕

Edit a Rule

User can edit any exist rule by clicking  next to rule.

✕

((FilterOnDimension=[Country]))

Contains Keywords

Custom Answer

```
Details for $FilterValue -
Total Sales: @[Sales]
Total Expense: @[Expense]
Total Budget: @[Budget]
```

Syntax: @[Measure], #[Dimension], [Dimension Value], [Time Period], \$FilterValue, <list>...</list>, Enter - Break Line
All keywords are case sensitive. Use the Tab key to change Dimension / Measure / Time Period after typing @[or #[or [


Add Chart

Select chart type ▼ Select measure ▼ Select dimension ▼


Allow Date Periods

Save Cancel


Delete a Rule

User can edit any exist rule by clicking  next to rule.

Push

If you have made any change in Measure(s) or Dimension(s), click  to push the metadata to the NLU.

Train

Once you pushed metadata of an application(s), click  to train the bot. This will train the bot only for those application of which metadata has been pushed successfully.



If pushing metadata or training bot is taking more than 30 minutes and showing status like “NLU Update Failed” or “Training Failed”, follow the bellow steps to change the request timeout.

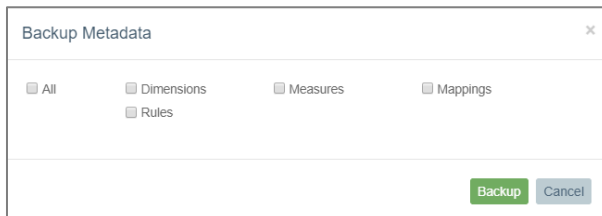
1. Go to “C:\Program Files (x86)\Qlik Insight Bot\Qlik Insight Bot Deployment Engine Service”.
2. Open **Qlik Insight Bot Deployment Engine Service.exe.config** file in text editor.
3. Find the tag for **RequestTimeout** under **appsettings** tag.
4. Change the value for **RequestTimeout**.

Note: The value for time is in milliseconds.



Backup metadata of an application

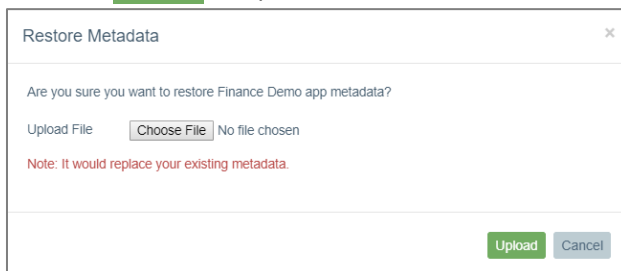
Qlik Insight Bot allows you to backup the details of all measures, dimensions, Mapping and/or Rule(s) with a single click. The same can be used again when user want to train the app which is being re-deployed. With a single click all backed-up information of an app will be restored.

Clicking  will ask you to select All/Dimension/Measure/Mappings/ Rules to either take backup of everything or the selected one. Click  after performing the selections to take a Backup.




Restore metadata of an application

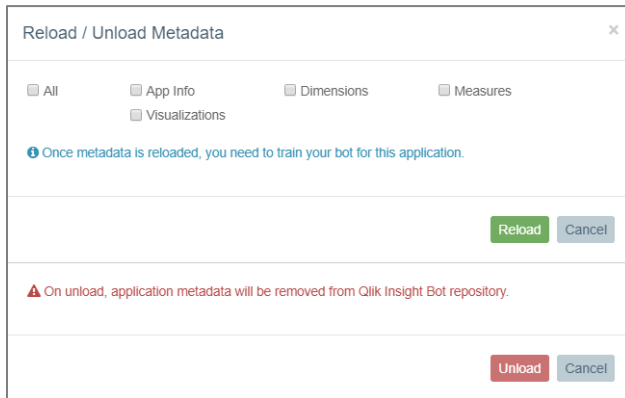
Qlik Insight Bot allows you to restore details of all measures, dimensions, Mapping and/or Rule(s) of an application with a single click. Clicking  will ask you to upload the JSON file. Select the file and click  to upload the file.



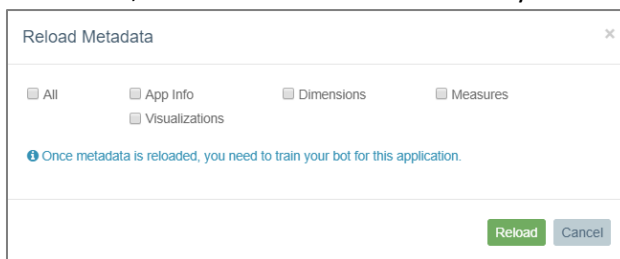
Reload metadata of an application




If user have made any changes in measure(s) or dimension(s) in Qlik Sense application or you changed the Qlik Sense application name and you want Qlik Insight Bot to give an answer related to those application information, measure(s) or dimension(s), user need to reload that metadata of an application. Click  to reload the metadata.

If you have not pushed metadata for an application, it will give you an option to reload App Info, Dimensions, Measures and Visualizations along with an option to unload the metadata.




If you have pushed metadata for an application already, it will give you an option to reload App Info, Dimension, Measures and Visualization only.




Please note that reload button on Application details page i.e.  search   will do the same operation.

Undeploy an application

If user wants to remove any app from Qlik Insight Bot, user have to undeploy the same. Click  to undeploy the app. Once, the last activity status changes to “Undeployed”, it is needed to train the bot again.




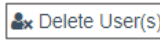


Refresh List

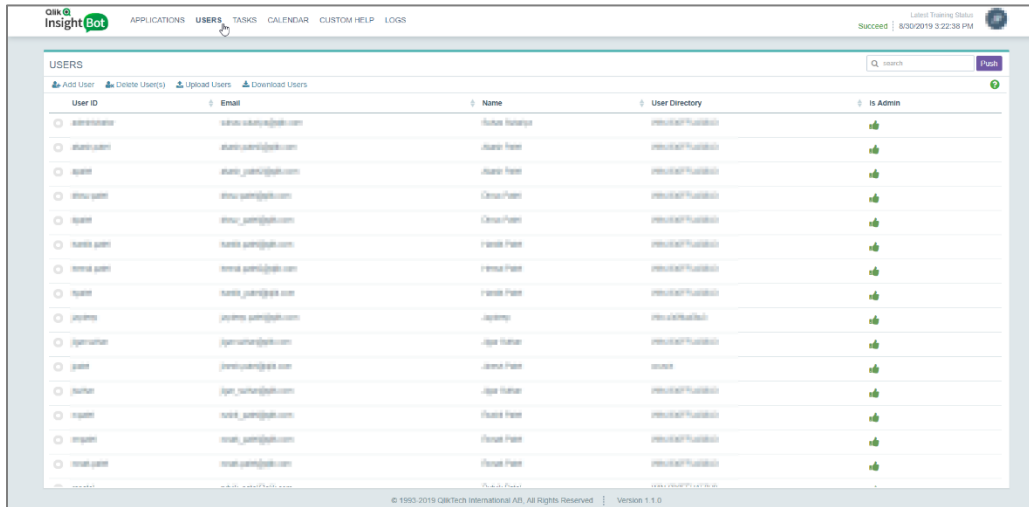
When user is training the bot or undeploying any application or user have made changes in synonyms of dimension(s)/measure(s) or user have changed measure-dimension mapping(s), user can check the status of process by clicking .

Users


Here, portal admin can add new user(s), edit details and rights of user(s) or delete the existing user(s). User can download users list of configured Qlik Sense Server, active directory and configured workspace of Slack. Also, portal admin can add multiple users simultaneously.

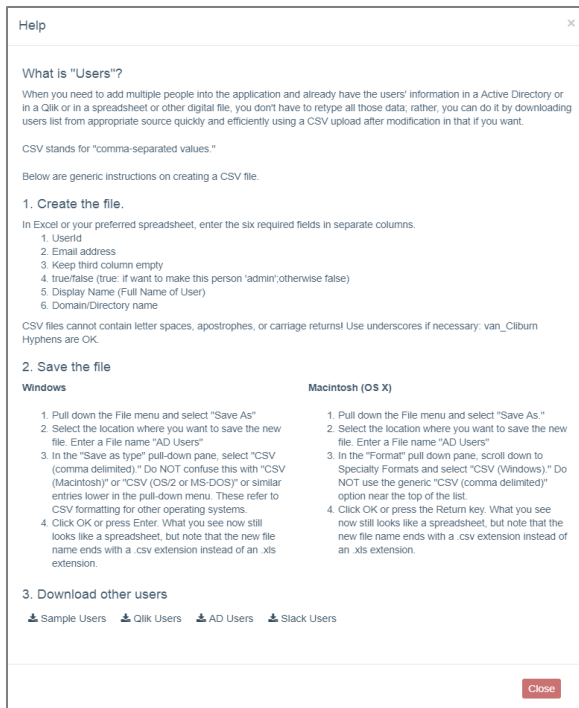
- **Controls**

-  **Push** Push updated user list to NLU. This will help NLU to identify the name and email of a user.
-  Edit existing user details.
-  **Add User** Add new user details.
-  **Delete User(s)** Delete users(s).
-  **Upload Users** Upload user(s) list.
-  **Download Users** Download user(s) list.



User ID	Email	Name	User Directory	Is Admin
admin@qlik.com	admin@qlik.com	Admin	qlik.com	Yes
admin@qlik.com	admin@qlik.com	Admin	qlik.com	Yes
admin@qlik.com	admin@qlik.com	Admin	qlik.com	Yes
admin@qlik.com	admin@qlik.com	Admin	qlik.com	Yes
admin@qlik.com	admin@qlik.com	Admin	qlik.com	Yes
admin@qlik.com	admin@qlik.com	Admin	qlik.com	Yes
admin@qlik.com	admin@qlik.com	Admin	qlik.com	Yes
admin@qlik.com	admin@qlik.com	Admin	qlik.com	Yes
admin@qlik.com	admin@qlik.com	Admin	qlik.com	Yes
admin@qlik.com	admin@qlik.com	Admin	qlik.com	Yes
admin@qlik.com	admin@qlik.com	Admin	qlik.com	Yes
admin@qlik.com	admin@qlik.com	Admin	qlik.com	Yes
admin@qlik.com	admin@qlik.com	Admin	qlik.com	Yes
admin@qlik.com	admin@qlik.com	Admin	qlik.com	Yes
admin@qlik.com	admin@qlik.com	Admin	qlik.com	Yes
admin@qlik.com	admin@qlik.com	Admin	qlik.com	Yes
admin@qlik.com	admin@qlik.com	Admin	qlik.com	Yes
admin@qlik.com	admin@qlik.com	Admin	qlik.com	Yes

Click  to get more information about users.



If you want to get list of all users from Qlik Sense or Active Directory or Slack, there is an option to download the same under "Help" of Users as shown in above image.

Below are the options under Download other users:

Sample Users: This is to download the zip file containing a sample csv file and a readme.txt (explains the file format).

Qlik users: This is to download the list of all users of configured Qlik Sense server. You can use this file to import directly to add multiple users at times. Please make sure Email Id to users are bound.

AD users: This is to download the users from Active Directory. Below parameters needs to be provided for download AD Users.


Path	Domain Path of a AD. Ex. LDAP://xxxxx
Username	Domain Admin User.
Password	Password of Admin User

Slack users: This is to download the list of all users from slack. This will work only when slack channel is configured from Configuration Application.

Note:

1. *Before uploading users make sure that users list file must match with the Sample Users file format.*
2. *If you import the Users file, it will replace the existing users with the new one. You can find the old list of users from archive folder at C://ProgramData/Qlik Insight Bot/Qlik/Archive.*

Add Users

User can add users by clicking 

Enter below Details to add a new user.

User ID	The user ID using which user are used login in Qlik Hub/QMC. e.g. jdoe
User Directory	User directory of a user. e.g. Domain
Email	Email Id of user. e.g. jdoe@domain.com
Name	User's name. e.g. John Doe
Is Admin	To create new user as an Admin, check this.

Add User Details
×

All fields are mandatory.

Note: If you are adding very first user, its must be an admin.

User ID

User Directory

Email

Name


Is Admin

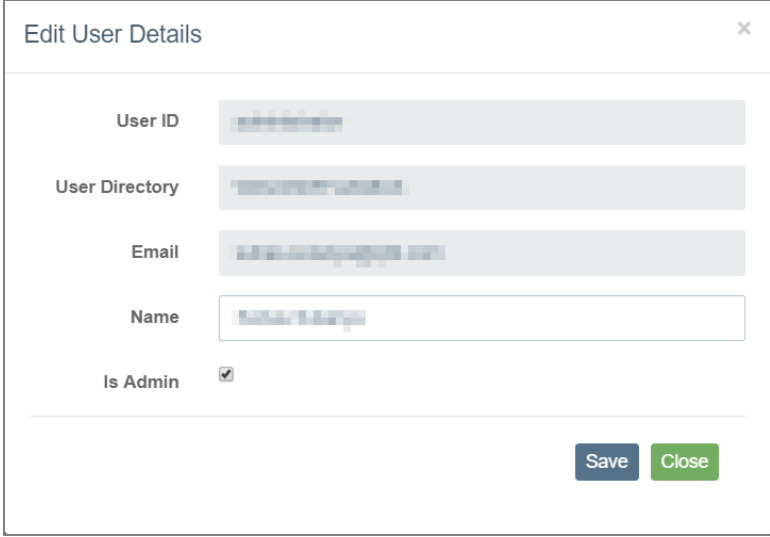
What is “Is Admin”?

An admin user can refresh the bot by asking “Refresh” in chat box. This will work as a command which will remove all users’ connections to Qlik Sense application and hence the context.

If a non-admin user wants to clear his connection and context to the application, he/she can ask “Disconnect app” or “Disconnect application”.

Edit User


To modify existing user details, click 





The 'Edit User Details' dialog box includes the following fields and controls:

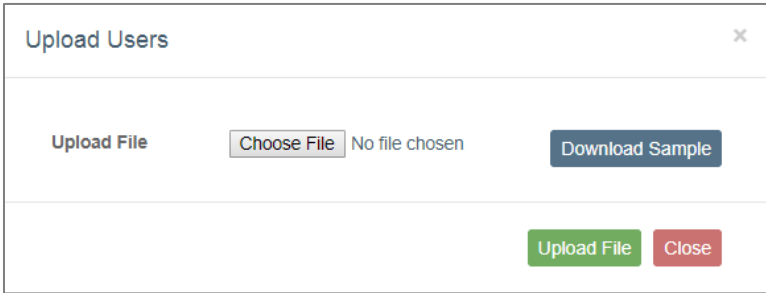
- User ID:** A text input field with a greyed-out value.
- User Directory:** A text input field with a greyed-out value.
- Email:** A text input field with a greyed-out value.
- Name:** A text input field with a greyed-out value.
- Is Admin:** A checked checkbox.
- Buttons:** 'Save' (blue) and 'Close' (green) buttons at the bottom right.

Delete User

To delete user(s) check mark the checkbox(s) beside the user ID(s), click 

Upload Users


To upload users, click . Select the **CSV** file which contains users list, or user can also download the sample and edit it, select **CSV** file, and click 



The 'Upload Users' dialog box includes the following controls:


- Upload File:** A section containing a 'Choose File' button and the text 'No file chosen'.
- Download Sample:** A blue button to download a sample CSV file.
- Buttons:** 'Upload File' (green) and 'Close' (red) buttons at the bottom right.

Download Users

Click  to download detail of all users.

Push Users

Once user makes any changes to the users list, user need to train the NLU. This is required to help Qlik Insight Bot to share insights to others via email just by telling the name of a person to the bot. Qlik Insight Bot will identify the appropriate email for the person.

User can use  button to push the updated users list to the NLU for update.

Tasks

Here, user can schedule the bot training to be done automatically. The scheduling module is one similar to QMC task scheduler. The user can set the time zone, date/time of task starts and ends and recurring frequency of a task. Also, user can disable particular task when not necessary.

- **Controls**



Add new task.



Edit existing task details.



Delete task.

Task Scheduler ×

Enabled

Timezone

Start Date

Recurring Frequency

Recurring Hour(s)

Recurring Minute(s)

End Date

Infinite

There are different recurring frequencies for task to be executed.

1. Once

This will allow task to be executed only once.

Recurring Frequency	Once
---------------------	------

2. Hourly

This will allow the task to be executed after every set hours/minute.

E.g. If you have set 2 as recurring hours and 30 as recurring minutes, the task will be executed after every 2 and a half hours from task start date/time.

Recurring Frequency	Hourly
Recurring Hour(s)	0
Recurring Minute(s)	0

3. Daily

This will allow the task to be executed after every day(s) given.

E.g. If you have set 4 as recurring days, the task will be executed after every 4 days from task start date.

Recurring Frequency	Daily
Recurring Day(s)	0

4. Weekly

This will allow the task to be executed after every week(s) given. You can also set the day of a week on which the task should be executed.

E.g. If you set 3 as recurring weeks and Monday as recurring day, the task will be executed every 3 weeks on upcoming Monday from task start date.

Recurring Frequency	Weekly
Recurring Week(s)	0
Recurring Day	Monday

5. Monthly

This will allow the task to be executed every month on a particular day.

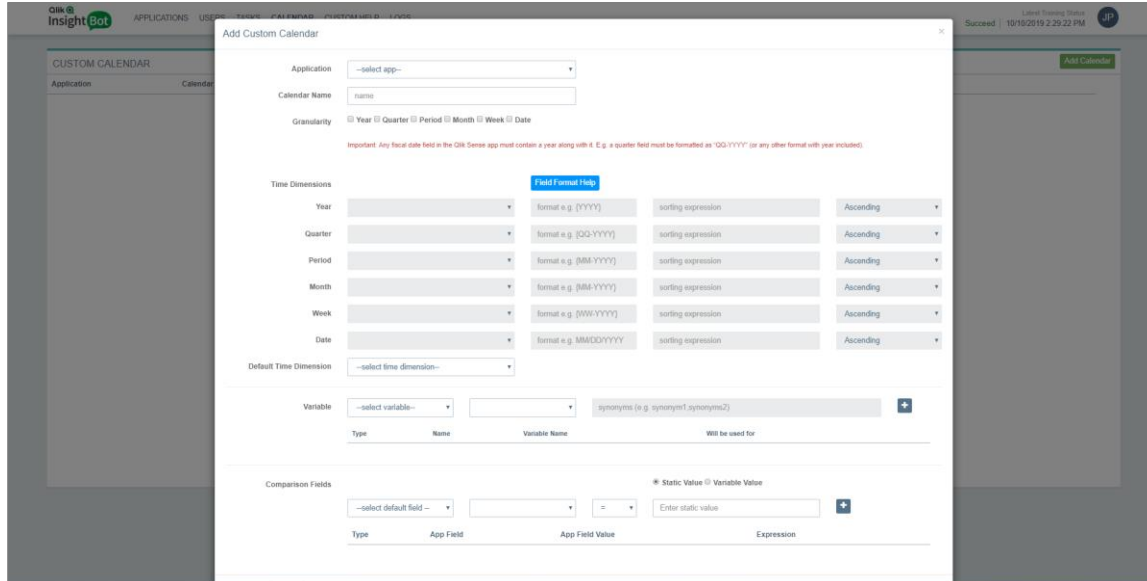
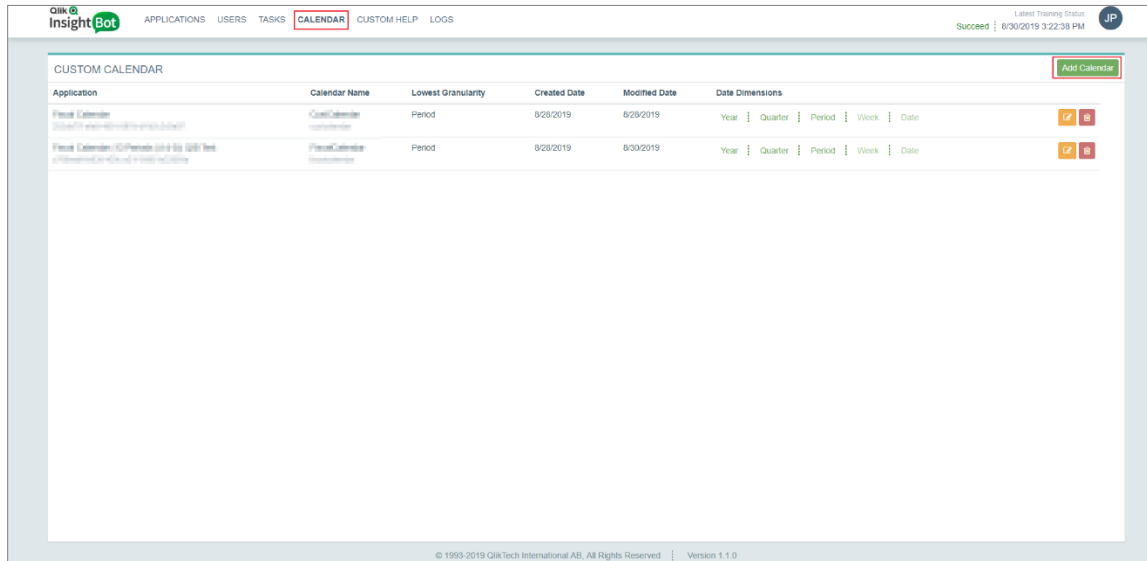
E.g. If you set 2 as recurring date, the task will be executed on every 2nd date of a month from task start date.

Recurring Frequency	Monthly
Recurring Date	0

Custom Calendar

Qlik Insight Bot's custom calendar allows you to apply date selections based on the fiscal calendar available in your Qlik Sense app. From Management Console you can map various time dimensions i.e. Year, Quarter, Period, Week with the corresponding fiscal date fields. Once mapped, you can assign the custom calendar to the measures of your choice. The custom calendar can be created per application for which the data has been loaded.

Click **Add Calendar** to create a new custom calendar.



1. Application

Select application for which you want to configure the custom calendar.

2. Calendar Name

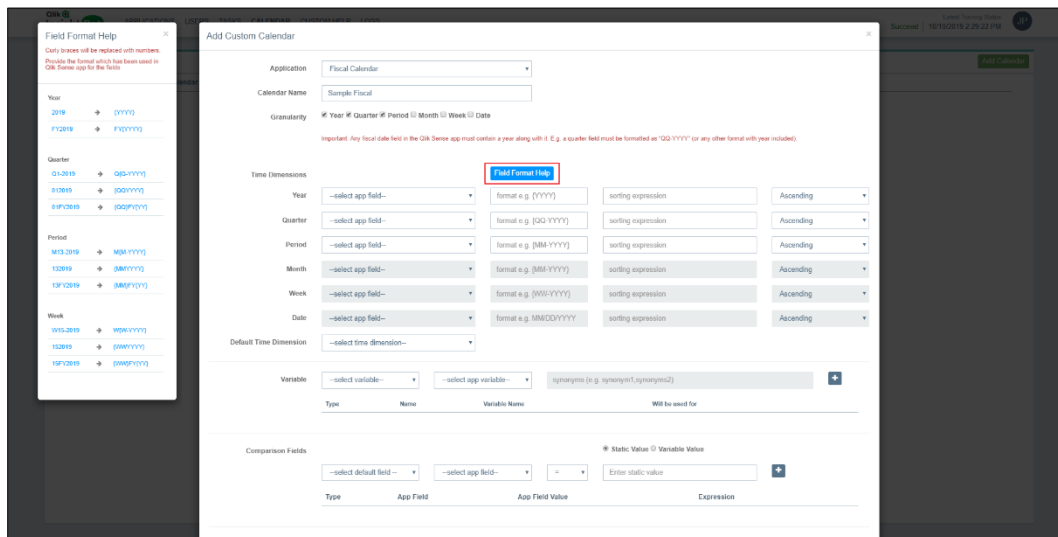
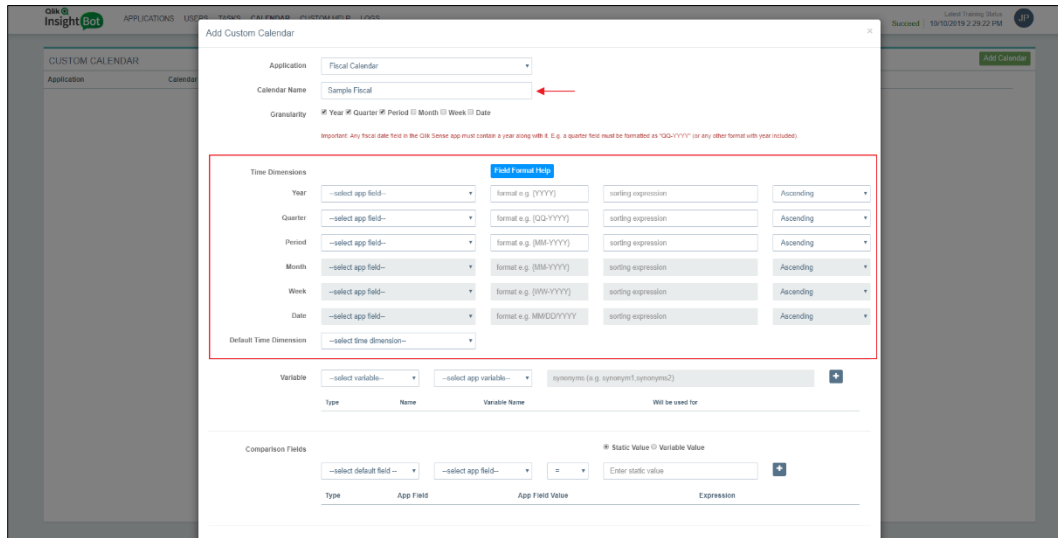
Appropriate name for the calendar. This calendar name will be added to the list of **Date Field** in Measures tab of an app which you have selected E.g. Fiscal Calendar

3. Granularity

Select the appropriate date fields (to be chosen from – Year, Quarter, Period, Month, Week, Date) from the list based on the fields available in the Qlik Sense app.

4. Time Dimensions

The relevant time dimension(s) will be enabled for further configuration based on the granularity value selected.



Below mentioned items are required to configure the selected time dimension.

Field name	Select appropriate field of QS application for the selected time dimension.
Format	Type the exact format which is already assigned to the above selected field in the Qlik Sense app. <i>NOTE: Click Field Format Help button to know how to give format.</i>
Sorting Expression	Add appropriate sorting expression (This is similar to applying a sorting expression in the Qlik Sense app). This is optional.
Sorting Order	Select appropriate sorting order. This is optional.

Any fiscal date field in the Qlik Sense app must contain a year along with it. E.g. a quarter field must be formatted as “QQ-YYYY” (or any other format with year included).

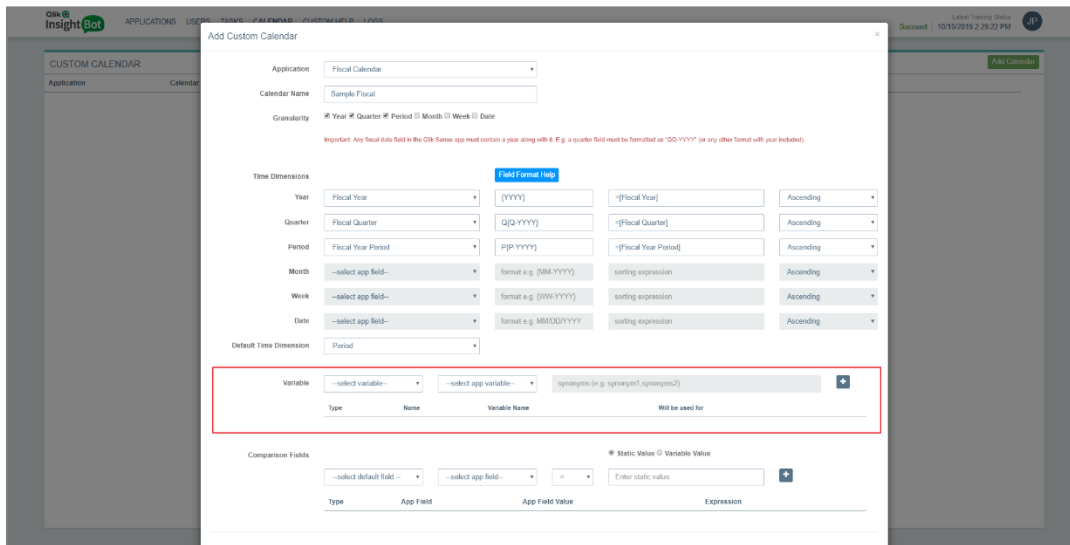
5. Default Time Dimension

On asking a question containing only measure (ex. Show me sales) shows a chart of measure by month-year. In the case of custom/fiscal calendar, one can set the time dimension field on which measure by time dimension chart will be created. Ex. If default time dimension is set to **Period** and on asking “Show me Sales”, it will show chart of Sales by Period (field assigned to Period).

6. Variable

This section allows you to form a response for the questions asking a measure value for a *current/previous time period* i.e. Show me the sales for current quarter.

This can be done by mapping a variable of Qlik Sense app with the QIB variable (Refer “Preparing Bot Compatible Qlik Sense application” document).



Select the variable from the variable drop-down list for the custom dates based on the granularity level. Select appropriate app variable from second dropdown list.

Variable name	Select a variable for a specific time period. Set variables only for selected Time Dimensions.
App variable	Select the relevant Qlik Sense app variable. NOTE: All variables of Qlik Sense app will be listed.
Synonyms	User can add relevant synonyms for the same. Synonyms must be comma separated.
+	Click to add variable.

7. Comparison Fields

This section allows you to form a response for the questions asking for period over period comparison i.e. YoY Sales , MoM Sales, QoQ Sales, etc. Also, QIB will show the buttons for period over period comparison after each answer asked for a measure.

This can be done by mapping appropriate values of ‘to date’ fields.

Default Field	Select a field for a specific time period.
App Field	Select the relevant Qlik Sense app field. NOTE: All fields of Qlik Sense app will be listed.
Operator	It could be equal to or not equal.
Enter Static value/Variable	Add the appropriate value of field for the comparison condition. It can be a static value or a variable. i.e. 1 or vYTD
+	Click to add mapping.

9. Measures

Select measure(s) for which you want the bot to answer with respect to custom calendar.

10. Refresh App Fields & Variables

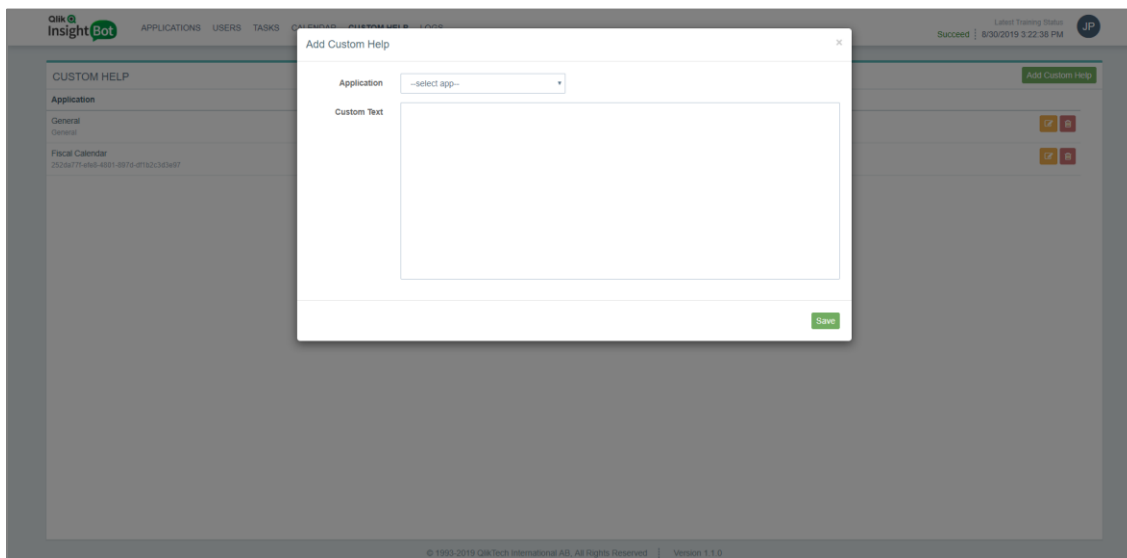
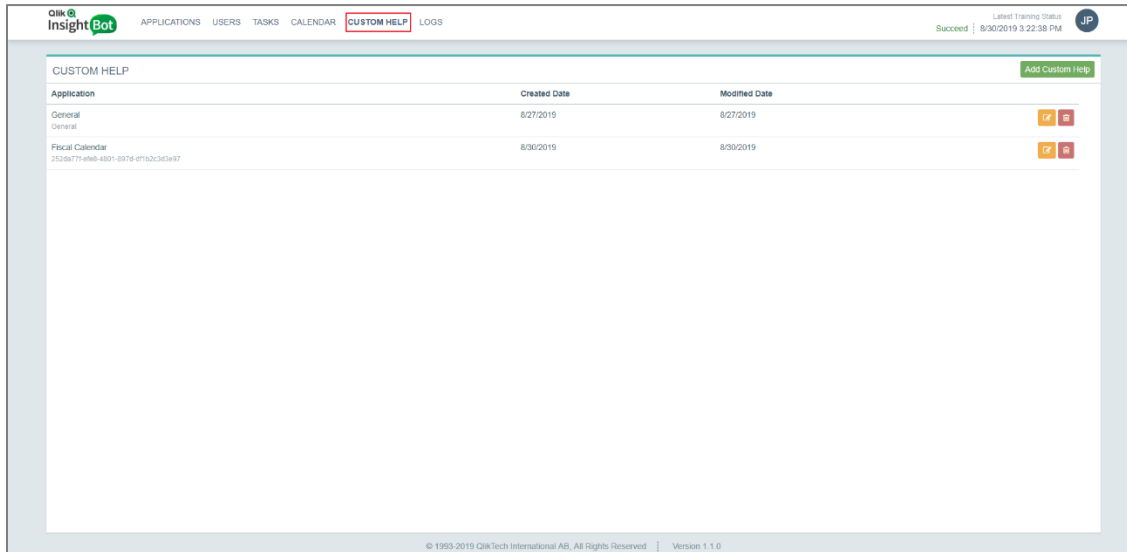
Click **Refresh App Fields & Variables** to reflect any changes made in QS application field(s) and variable(s).

Click **Save** to save all above configurations.

Custom Help

Custom Help let you insert the customized response whenever user ask for the help specific to the app. You can now set the application wise custom help text. If you do not want to set any custom help for any application, QIB will show the default custom help. You can also change the default custom help displayed as **General** in Management Console.

Click **Add Custom Help** to set customized help text.



Application	Select application for which you want to add customized text.
Custom text	Add customized text for selected application.

Click **Save** to save the customized help text.

Logs

A user can also see the activity logs of an application. The logs show details of which events, at what time have been occurred to the application i.e. when the app data was loaded/reloaded, when the app was queued to be pushed, when the app was pushed etc. This also shows a descriptive message or an error message (in any) associated with the event.

Qlik App ID	Status	Date	Message	Error
[Redacted]	Pushed	8/9/2019 8:04:11 AM	Pushed metadata of application	
[Redacted]	Pushing	8/9/2019 8:04:07 AM		
[Redacted]	Queued	8/9/2019 8:04:05 AM		
[Redacted]	Loaded	8/9/2019 8:03:47 AM	Updated metadata successfully	
[Redacted]	Loading	8/9/2019 8:03:40 AM		
[Redacted]	Queued	8/9/2019 8:03:39 AM		
[Redacted]	Undeployed	8/9/2019 8:00:39 AM	Application undeployed successfully	
[Redacted]	Undeploying	8/9/2019 8:00:39 AM		
[Redacted]	Queued	8/9/2019 8:00:38 AM		
[Redacted]	Loaded	8/9/2019 8:00:15 AM	Updated metadata successfully	
[Redacted]	Loading	8/9/2019 8:00:02 AM		
[Redacted]	Queued	8/9/2019 8:00:01 AM		
[Redacted]	Pushed	8/9/2019 8:29:05 AM	Pushed metadata of application	

--- EOD ---