3

Installing and Configuring QlikView Server

Installing the QlikView Server

To Install the QlikView Server

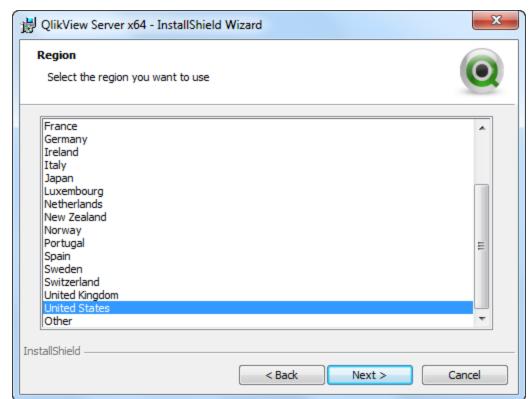
1. From the Run <code>QlikViewServer_11SR7_x64Setup.exe</code> for Windows Server 2008 R2 or <code>QlikViewServer_11SR7_Win2012</code> and <code>Up.exe</code> for Windows Server 2012 R2 or higher. The installer is located in the <code>QlikView Installer</code> folder of the unzipped Aptean Analytics application files.

The QlikView Server installation wizard **Welcome** screen is displayed.



Figure 3-1 QlikView Server Installation Wizard Welcome Screen

2. Click Next.



The QlikView Server installation wizard > **Region** screen is displayed.

Figure 3-2 QlikView Server Installation Wizard Region Screen

3. Select the region you want to use and click **Next**.

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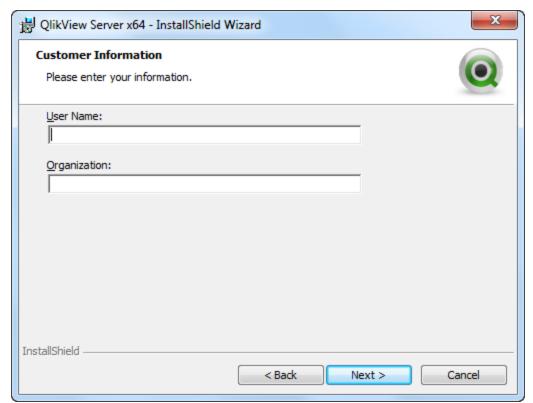
🙀 QlikView Server x64 - InstallShield Wizard License Agreement Please read the following license agreement carefully. USER LICENSE AGREEMENT INTRODUCTION PERMISSION TO DOWNLOAD, INSTALL AND USE THE SOFTWARE IS CONDITIONAL UPON YOU, THE USER OF THE SOFTWARE ("USER"), AGREEING TO THIS USER LICENSE AGREEMENT ("ULA") WHICH IS BETWEEN THE QLIKTECH ENTITY THAT ISSUED THE LICENSE KEY AS IDENTIFIED IN TABLE 1 TO THIS ULA ("QLIKTECH") AND USER. THIS ULA SHALL GOVERN USER'S USE OF THE QLIKVIEW SOFTWARE AND DOCUMENTATION. USER SHALL BE BEOLIBED TO ACREE TO THE LILA APPLICABLE TO EACH LIPDATE TO THE Print I accept the terms in the license agreement I do not accept the terms in the license agreement For your reference only, translations of the ULA can be found here. http://www.qlikview.com/us/info/software-ula InstallShield < Back Next > Cancel

The **License Agreement** screen is displayed.

Figure 3-3 QlikView Server Installation Wizard License Agreement Screen

 Read the license agreement, select I accept the terms in the license agreement, and click Next to continue.

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The **Customer Information** screen is displayed.

Figure 3-4 QlikView Server Installation Wizard Customer Information Screen

- 5. Type the **User Name** and **Organization** in the corresponding fields.
- 6. Click **Next** to continue.

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The **Destination Folder** screen is displayed.

Figure 3-5 QlikView Server Installation Wizard Destination Folder Screen

By default, the files are installed in the C:\Program Files\QlikView folder.

- To change the destination folder, click **Change**. Browse and locate the folder to install the files, and click **Open**.
- 7. Click **Next** to proceed with the installation.

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🙀 QlikView Server x64 - InstallShield Wizard **Profiles** Select the region you want to use Full Installation, Single machine with QlikView Webserver Help Full Installation, Single machine with IIS Custom installation, select profiles **Profiles** QlikView Server Webserver Reload/ Distribution Engine Management Console InstallShield Config < Back Next > Cancel

All files are installed in the specified folder and the **Profiles** screen is displayed.

Figure 3-6 QlikView Server Installation Wizard Profile Screen

- 8. Select Full Installation, Single machine with IIS.
- 9. Click Next.

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The IIS Website screen is displayed.

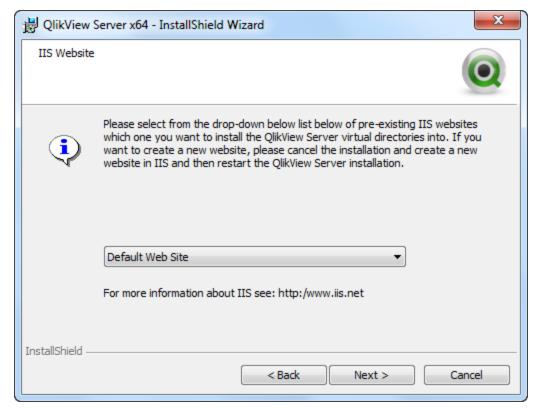


Figure 3-7 QlikView Server Installation Wizard IIS Website Screen

- 10. Select **Default Web Site** from the drop-down list of pre-existing IIS websites.
- 11. Click Next.

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Logon Information
Specify a user name and password

Specify the user name and password of the user account that will logon to use this application. The user account must be in the form DOMAIN\Username.

I want to specify the account to be used for the services later.

User name:

Password:

Browse...

Password:

InstallShield

Sadk

Next

Cancel

The **Logon Information** screen is displayed.

Figure 3-8 QlikView Server Installation Wizard Logon Information Screen

12. In the **User name** box, specify the name of the domain user with administrative privileges on the QlikView server.

To do this,

a. Click Browse or type the user name in <Domain name/QlikView Admin User name> or <Local computer/user name> format.

The Browse for a User Account dialog box is displayed.

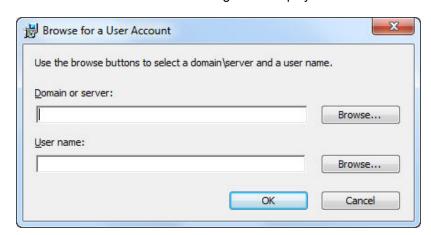


Figure 3-9 Browse for a User Account Dialog Box

b. Click the Browse button next to the Domain or server field to specify the domain / server. Alternatively, you can type the user name in the <Domain name/QlikView Admin User name> or <Local computer/user name> format.

Selecting the **Browse** button displays the **Select a Domain or Server** dialog box.

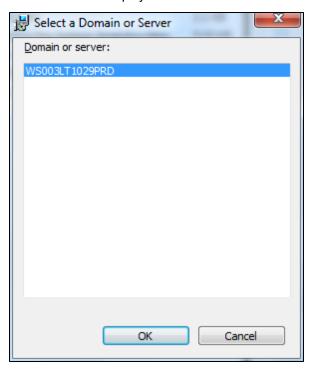
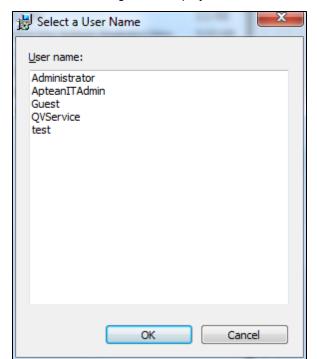


Figure 3-10 Select a Domain or Server Dialog Box

- c. Select the domain or server name, and click **OK**.
- d. In the <u>Browse for a User Account</u> dialog box, click the **Browse** button next to the **User name** field to specify the user name.

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The **Select a User Name** dialog box is displayed.

Figure 3-11 Select a User Name Dialog Box

- e. Select the domain user with QlikView administrative privileges, and click **OK**.
- f. In the Browse for a User Account dialog box, click OK.
- 13. In the **Logon Information** screen, type the password you created for the specified user in the **Password** field and click **Next**.

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🙀 QlikView Server x64 - InstallShield Wizard Service Authentication Select the QlikView servers authentication method Use digital certificates Authenticate communication between QlikView servers using digital certificates and SSL. This alternative is recommended in environments where not all servers have access to a common Windows Active Directory or when the security provided by certificate authentication is Use QlikView Administrators Group Authenticate communication between QlikView services based on membership in the local Windows group QlikViewAdministrators. This alternative can be used in environments where all servers that are part of the QlikView installation can authenticate using a common Windows Active Directory. InstallShield -< Back Next > Cancel

The **Service Authentication** screen is displayed.

Figure 3-12 QlikView Server Installation Wizard Service Authentication Screen

14. Select Use QlikView Administrators Group and click Next.

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The wizard is ready to install the application.

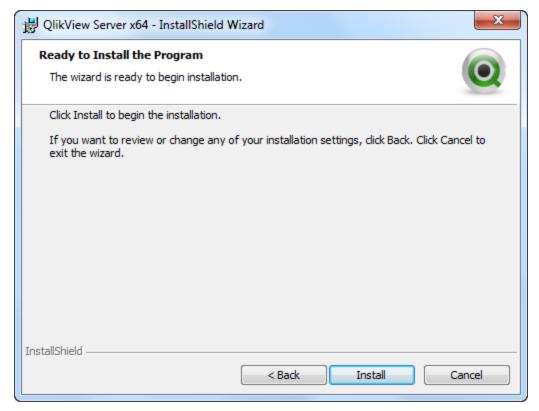


Figure 3-13 QlikView Server Installation Wizard Ready to Install Program Screen

15. Click Install.

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Installing QlikView Server x64
The program features you selected are being installed.

Please wait while the InstallShield Wizard installs QlikView Server x64. This may take several minutes.

Status:
Copying new files

InstallShield

< Back

Next > Cancel

The InstallShield Wizard displays the status of the files being installed.

Figure 3-14 QlikView Server Installation Wizard Installing Screen



The InstallShield Wizard Completed screen is displayed.

Figure 3-15 QlikView Server Installation Wizard Final Screen

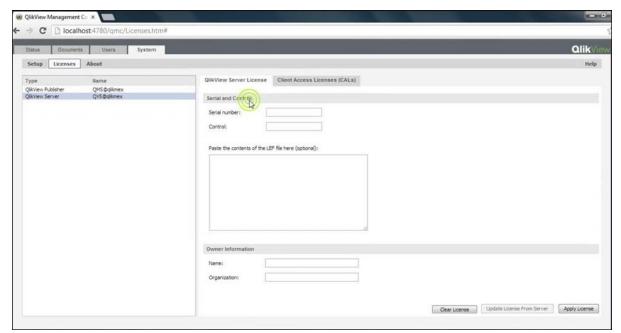
- 16. Click Finish.
- 17. Restart the computer.

Applying QlikView Server License

To Apply QlikView Server License

- 1. Click Start > All Programs > QlikView > QlikView Management Console. If you are using Windows Server 2012 or higher, open all Apps and then click QlikView Management Console.
- 2. Click the System tab, and then click Licenses > QlikView Server > QlikView Server License.

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The **QlikView Management Console** screen is displayed.

Figure 3-16 QlikView Management Console Screen

- 3. Based on the information received, copy and paste the Serial number and Control number into the corresponding fields. Also, update the **Name** and **Organization** fields.
- 4. Click Apply License.
- 5. Click **OK** to restart QlikView services.
 - Note: QlikView services automatically restart when you click **OK**. The control number will no longer be visible, and the license related text is displayed in the box below the control number.

Installation Guide

Configuring IIS for QlikView Server

To Configure IIS for QlikView Server

- 1. Launch **IIS Manager** using any one of the following methods:
 - Click Start > Administrative Tools, and then double-click Internet Information Services
 Manager.
 - Click Start and click the Run program.
 In the Run dialog box, type InetMgr and click OK.
- 2. In the IIS Manager, change the <code>QlikView</code> virtual directory application pool to QlikView IIS.
 - a. In the IIS Manager, expand Sites, expand Default Web Site, and select QlikView.

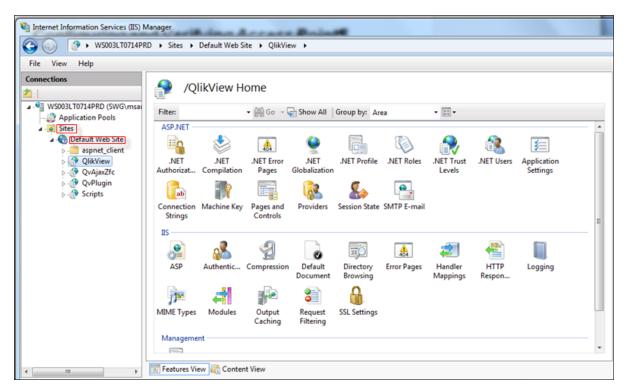
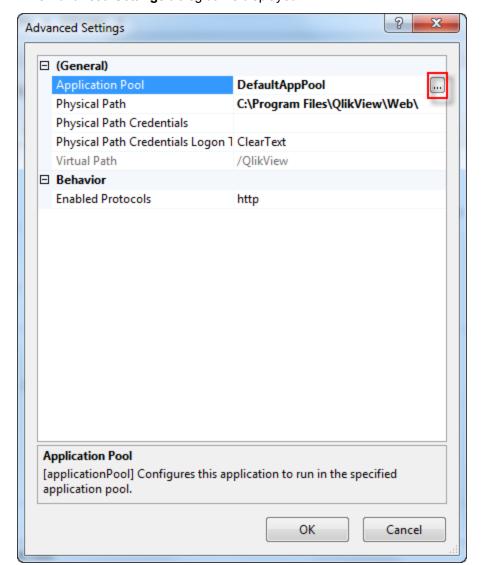


Figure 3-17 IIS Manager

🛂 Internet Information Services (IIS) Manager ▶ WS003LT0714PRD → Sites → Default Web Site → QlikView → File View Help Connections /QlikView Home WS003LT0714PRD (SWG\msai Filter: ▼ III Go → III Show All Application Pools ASP.NET Default Web Site > III aspnet_client Qlik\/iexx MET .NET .NET Error Explore npilation Globalizatio Pages QvA 🔎 ⊳ ... QvF Edit Permissions... Scri Add Application... hine Key Pages and Providers Add Virtual Directory... Controls Manage Application Browse Refresh Advanced Settings... Remove hentic... Compression Default Document Deploy Switch to Content View

b. Right-click, point to Manage Application, and click Advanced Settings.

Figure 3-18 IIS Manager-Select Advanced Settings



The **Advanced Settings** dialog box is displayed.

Figure 3-19 Advanced Settings Dialog Box

c. Select **Application Pool** and click the ellipsis button.

Select Application Pool

Application pool:

QlikView IIS

Properties:

.Net Framework Version: 4.0
Pipeline mode: Integrated

OK

Cancel

The **Select Application Pool** dialog box is displayed.

Figure 3-20 Select Application Pool Dialog Box

- d. From the Application pool drop-down list, select QlikView IIS and click OK.
- e. Click **OK** to close the **Advanced Settings** dialog box.
- 3. Enable Authentication for QlikView.
 - a. In the IIS Manager, expand Sites, expand Default Web Site, and select QlikView.
 - b. In the **IIS** section of the **/QlikView Home** pane, double-click **Authentication**.

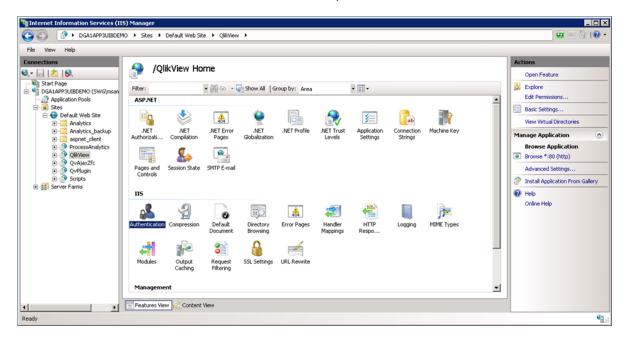


Figure 3-21 IIS Manager-Select Authentication

- c. In the **Authentication** pane, if **Windows Authentication** is displayed and enabled, right-click and disable it.
- d. In the **Authentication** pane, if **Anonymous Authentication** is disabled, right-click and enable it.
- e. Click Back to exit authentication.

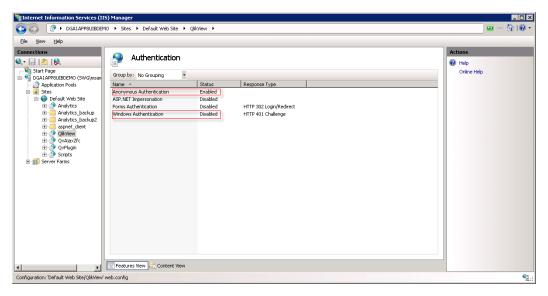


Figure 3-22 IIS Manager-Enable Anonymous Authentication for QlikView

- 4. Enable authentication for QvAjaxZfc.
 - a. In the IIS Manager, expand Sites, expand Default Web Site, and select QvAjaxZfc.
 - b. In the **IIS** section of the **/QvAjaxZfc Home** pane, double-click **Authentication**.

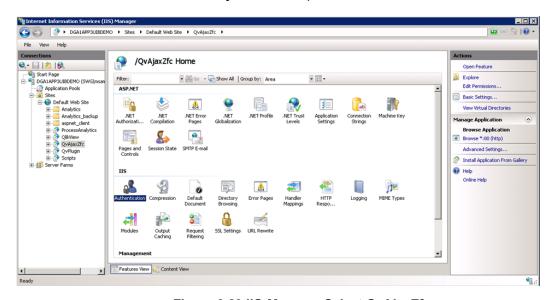


Figure 3-23 IIS Manager-Select QvAjaxZfc

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- c. In the **Authentication** pane, if **Windows Authentication** is displayed and enabled, right-click and disable it.
- d. In the **Authentication** pane, if **Anonymous Authentication** is disabled, right-click and enable it.

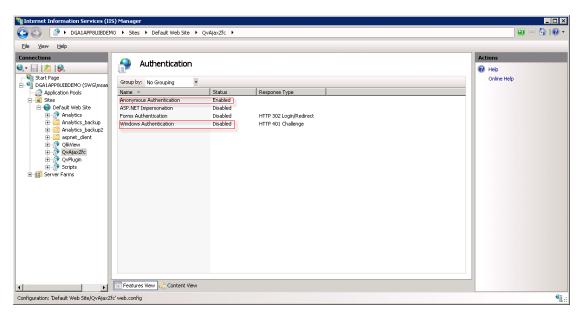


Figure 3-24 IIS Manager-Enable Anonymous Authentication for QvAjaxZfc

- e. Click Back to exit authentication.
- 5. Close the IIS Manager.

Installation Guide

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Configuring Aptean Analytics

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Copying Files

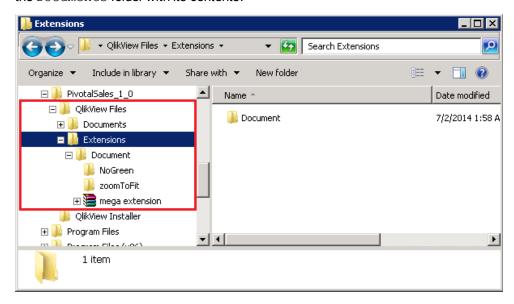
To copy Aptean Analytics for Pivotal Sales files

- From the local directory in which the unzipped files are saved, copy the contents of
 ..\QlikViewFiles\Documents folder to C:\ProgramData\QlikTech\Documents
 folder on the QlikView server.
 - Note: C:\ProgramData is a hidden folder. Type the path in Windows Explorer to view the contents.
- 2. From the local directory in which the unzipped files are saved, copy the contents of the ..\QlikViewFiles\Extensions folder to
 C:\ProgramData\QlikTech\QlikViewServer\Extensions folder on the QlikView server. If the Extensions folder does not exist, copy the entire folder to the QlikView Server.
 - **Note:** C:\ProgramData\QlikTech\QlikViewServer is hidden. Type the path in Windows Explorer to view the contents.

Installation Guide

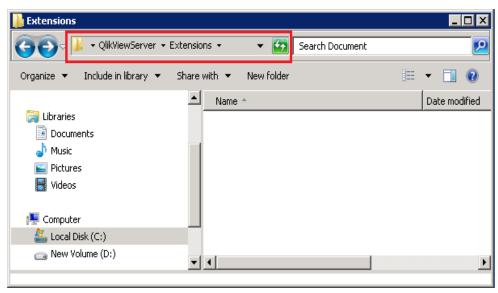
The Extensions\Document folder contains the NoGreen folder.

The following image illustrates the folder structure of the Extensions folder at the location where you unzip the installer zip. Copy the contents of the Extensions folder, which includes the Documents folder with its contents.



The following image illustrates the

c:\ProgramData\QlikTech\QlikViewServer\Extensions folder. Paste the contents of the Extensions folder that you copied from the unzipped location to this folder. If the Extensions folder does not exist, create one or copy the entire Extensions folder from the unzipped location and paste it here.



Pivotal Data Security

To enable user-specific data and reports to be displayed on Analytics, you must generate security templates. To do this, perform the following tasks:

- Note: Steps 2,3, and 4 in the below procedure must be performed by the Pivotal Administrator.
- 1. Edit the security template batch file.
- 2. <u>Import Master View.rtr in Pivotal Toolkit</u>. This file is available in the location where you unzipped the installer zip file.
- 3. Apply Customization Changes on the Offline System.
- 4. Upgrade From Offline.

Enable Security Parameter

By default, the security is disabled by using the $v_PivotalSecurity$ configuration parameter in the ProcessAnalytics Config.qvs file.

- Open the ProcessAnalytics_Config.qvs file located in C:\ProgramData\QlikTech\Documents.
- 2. Update the ProcessAnalytics Config.qvs file:

```
//1 = Use Pivotal Security /0 = No Security
SET v_PivotalSecurity = 1;
```

Save the file.

Security is enabled.

To edit the security template batch file

- 1. Open the \QlikTech\Documents\PivotalSecurityAccess folder.
- 2. Right-click the GenerateSecurityTemplate.bat file and open it in Notepad.

```
Locate the following string in the file: pivotalsecurityaccess\SecurityAccess.exe
http(s)://<PBS_Server_Name> <ProductionSystemName> Client
pivotalsecurityaccess\tables.txt
```

3. Replace the Pivotal Business Server name and the Production System name with the relevant system names, and save the file.

To import Master_View.rtr file

- Note: This procedure must be performed by the Pivotal Administrator on the Toolkit computer.
- 1. Click Start > Programs > CDC Software > Pivotal CRM > Pivotal Toolkit.
- 2. In the **Pivotal Login** dialog box, select **Customization System** from the **System** drop-down list.
- 3. On the eTab, click Transporter and click Import Elements from File.
- 4. Browse to the location where you have extracted the contents of the zip file.
- 5. Select Master View.rtr and click Open.

- 6. In the dialog box that is displayed, click **Continue**.
- 7. When the RTR is imported, a message box is displayed. Click ${\bf OK}$.

 $\label{themoster_view.rtr} \textbf{Ine} \, \texttt{Master_View.rtr} \, \textbf{is} \, \textbf{imported}.$

To Apply Customization Changes

- Note: This procedure must be performed by the Pivotal Administrator on the Pivotal Business Server.
- 1. Click Start > Programs > CDC Software > Pivotal CRM> Pivotal Administration Console.
- 2. In the **Pivotal Administration Console** window, expand **Data Synchronization**, and then expand the machine name.
- 3. In the list of Pivotal systems, right-click the Offline system and click **Apply Customization Changes**.
- 4. Click Close when the dialog box displays a message indicating the completion of the process.

The customization changes are applied to the Offline System.

To Upgrade from Offline

- **Note:** This procedure must be performed by the Pivotal Administrator on the Pivotal Business Server.
- 1. In the **Pivotal Administration Console** window, expand **Data Synchronization**, and then expand the machine name.
- 2. In the list of Pivotal systems, right-click the Production system and click **Upgrade From Offline**.
- 3. Click **Close** when the dialog box displays a message indicating the completion of the process.

The Production System is upgraded from the Offline System.

Aptean Analytics Pivotal Sales

Configuring Access and Login

To Configure Access and Login

- 1. In the QlikView Management Console, ensure that anonymous access is prohibited.
 - a. Click the System tab, click Setup, and then expand <code>QlikView Servers</code>.
 - b. Select your QlikView server and click the **Security** tab.
 - c. Select **Prohibit anonymous** in the **Clients** section and **On local computer** in the **Anonymous Account** section.
 - d. Select **DMS** authorization in the Authorization section.

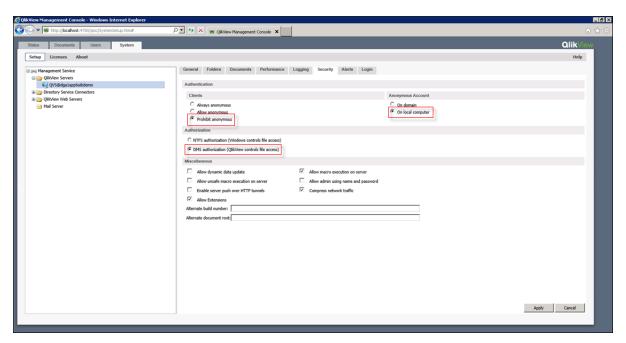


Figure 4-1 QlikView Management Console-Prohibit Anonymous Access for Server

- e. Click Apply.
- 2. In the QlikView Management Console, ensure that authentication is set to login.
 - a. Expand QlikView Web Servers.
 - b. Select your QlikView Web server.
 - c. Click the Authentication tab.
 - d. In the Authentication section, select Login.
 - e. Click **Apply**.

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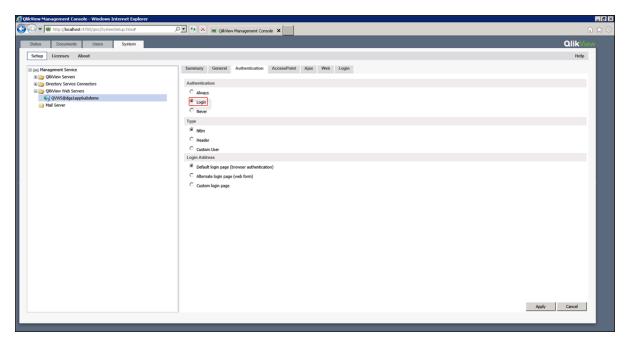
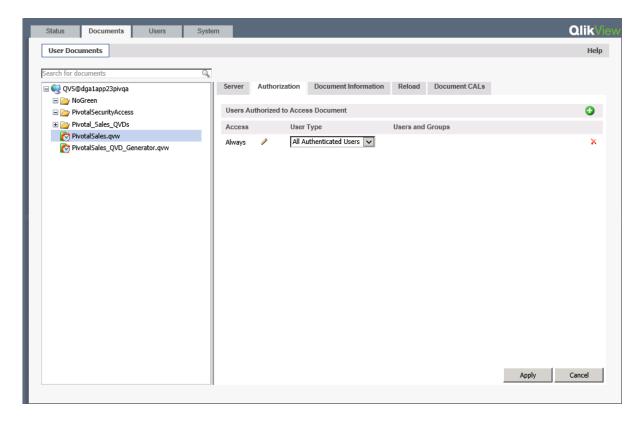


Figure 4-2 QlikView Management Console-Select Login Authentication

- 3. In the QlikView Management Console, set authentication for the QlikView file.
 - a. Click the **Documents** tab.
 - b. Click User Documents.
 - c. Expand the QlikView server.
 - d. Click the PivotalSales.qvw file.
 - e. Click the **Authorization** tab on the right pane.
 - f. Click next to Users Authorized to Access Document.
 - g. Select All Authenticated Users from the Always drop-down list.
 - h. Click Apply.

Installation Guide



To Configure Pre-assign Users to QlikView Licenses

- 1. In the QlikView Management Console, set authentication for the QlikView file.
 - a. Click the **System** tab.
 - b. Click **Licenses** and then click on the QlikView server.
 - c. Click the Client Access Licenses (CALs) tab on the right pane.
 - d. Under Client Access Licenses (CALs) tab, click **General** tab and make sure that **Allow dynamic CAL assignment** is unchecked.

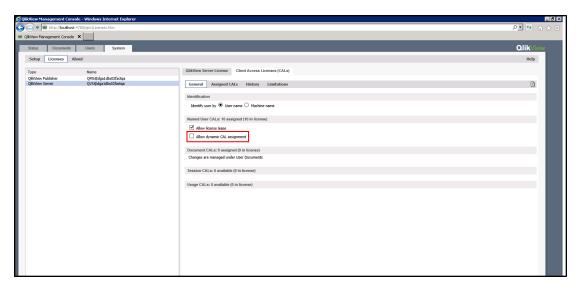


Figure 4-3 QlikView Management Console - General Tab

- e. Then click on **Assigned CALs** tab.
- f. Click 9

The Manage Users dialog box is displayed.

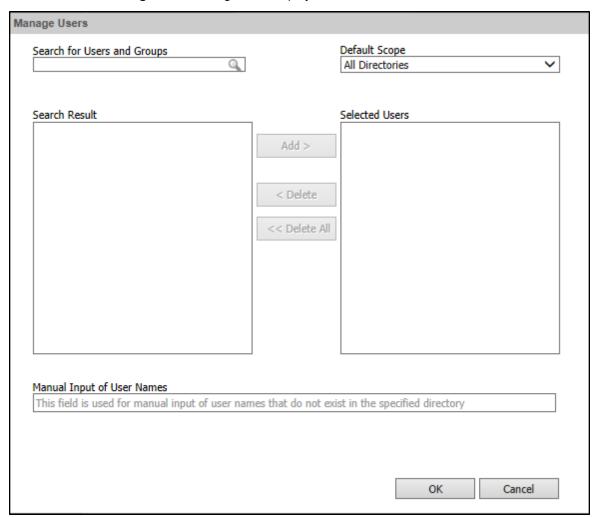
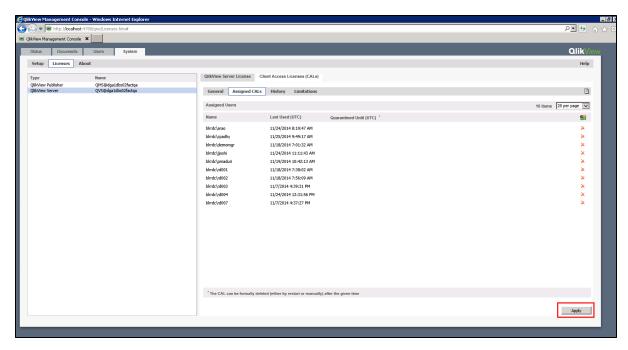


Figure 4-4 Manage Users Dialog Box

- h. In the Manual Input of User Names text box, type <default domain name\login name>.
- i. Click OK.
- j. List of licenses are displayed in the **Assigned Users** section on the right pane.
- k. Click Apply.



To Configure Restrict Named Users for Dynamic QlikView License Assignment

- 1. In the QlikView Management Console, set authentication for the QlikView file.
 - a. Click the **Documents** tab.
 - b. Click User Documents.
 - c. Expand the QlikView server.
 - d. Click the PivotalSales.qvw file.
 - e. Click the **Authorization** tab on the right pane.
 - f. Click next to Users Authorized to Access Document.
 - g. Select Named Users from the Always drop-down list.
 - h. Click **Apply**.

Figure 4-5 QlikView Management Console - Authorization Tab

Configuring Data Source Properties

To Configure Data Source Properties

Note: All the configuration entries must end with a semicolon.

- Locate the PivotalSales_Config.qvs file in the
 C:\ProgramData\QlikTech\Documents folder and open in Notepad to edit as an administrator.
- 2. Locate and change the following Data WareHouse Settings:

- For Pivotal:
- 7. Locate the LET var_Dashboard_Start_Year=<year>; enter the year you wish to display the historical information from. This value indicates your starting year and limits how far back in history your dashboard data is loaded.
- 8. Click Save and close the text file.

Configuring Refresh Intervals

To Configure Refresh Intervals in Doc Properties

- Click Start, point to All Programs, click QlikView > QlikView Management Console, if QlikView Management Console is not already open. If you are using Windows Server 2012 or higher, open all Apps and click QlikView Management Console.
- 2. Click the **Documents** tab.
- 3. Click User Documents.
- 4. Expand the QlikView server.
- 5. Select the PivotalSales QVD Generator.qvw file.

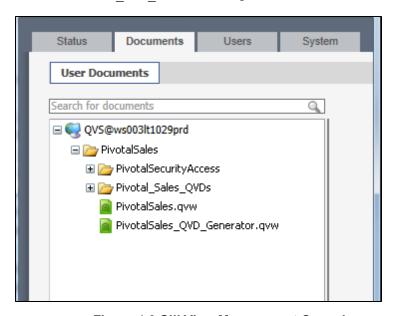


Figure 4-6 QlikView Management Console

6. Click the **Reload** tab on the right pane.

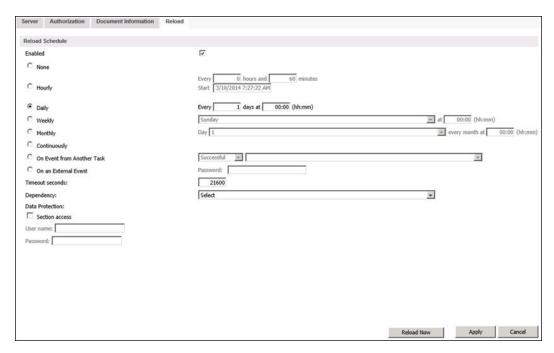


Figure 4-7 QlikView Management Console - Reload Tab

- 7. Specify a **Reload Schedule**. It is recommended that you choose Daily reload schedule, at a time that is off-peak hour.
- 8. Specify a schedule and click Apply.
- 9. Click Reload Now.
- 10. Select the PivotalSales.qvw file.
- 11. Click the Reload tab.
- 12. In the Reload Schedule section, select Enabled.
- 13. In the Reload Schedule section, select On Event from Another Task.
- 14. From the condition list, select **Successful**.
- 15. From the event list, select **PivotalSales_QVD_Generator.qvw**.
- 16. Select the **Section Access** check box in the **Data Protection** area.
- 17. Specify the **User name** and **Password** of a Pivotal Business Server user with a license and a valid Employee record.
- 18. Click Apply.
- 19. Click Reload Now.

Assigning QlikView License

To assign QlikView licenses, you must allocate the following:

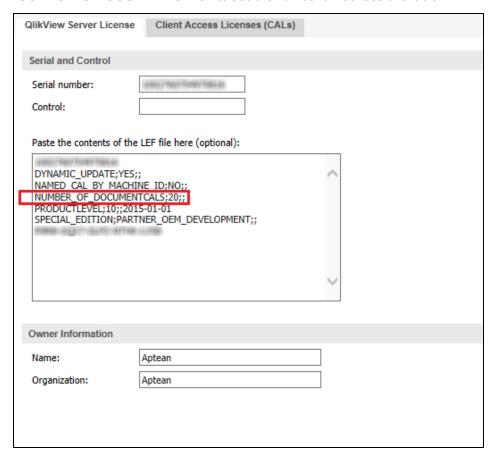
- Document CAL (Client Access Licenses)
- User CAL

Before you assign the licenses, you can check the number of licenses available.

To check the number of licenses available

- 1. In the QlikView Management Console, click the System tab.
- 2. Click Licenses.
- 3. Click the QlikView Server on the left pane.
- Click the QlikView Server License tab on the right pane. In the Serial and Control section, licensing information is displayed.

In the **Paste the contents of the LEF file here (optional):** text box, locate NUMBER_Of_ <USERCALS/DOCUMENTCALs> to see the number of licenses available.



To allocate Document CALs

- 1. In the QlikView Management Console, click the Documents tab.
- 2. Click User Documents.
- Select PivotalSales.qvw.
- 4. Click the **Document CALs** tab.

- 5. In the **Number of CALs allocated to this Document** field, type the number of document CALs purchased for the application.
- 6. Select the Allow dynamic CAL assignment check box.

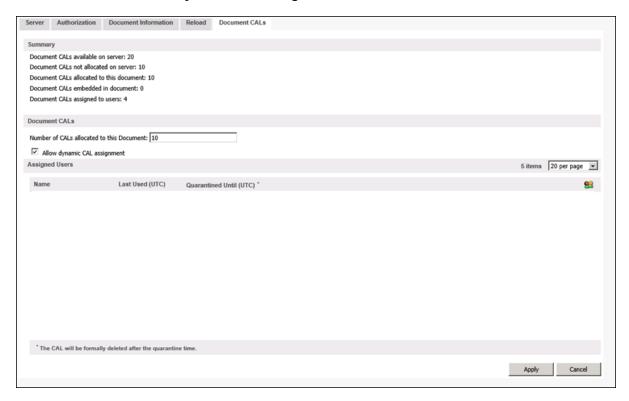


Figure 4-8 QlikView Management Console-Documents CALs Tab

- 7. Click Apply.
- 8. Click the Authorization tab.

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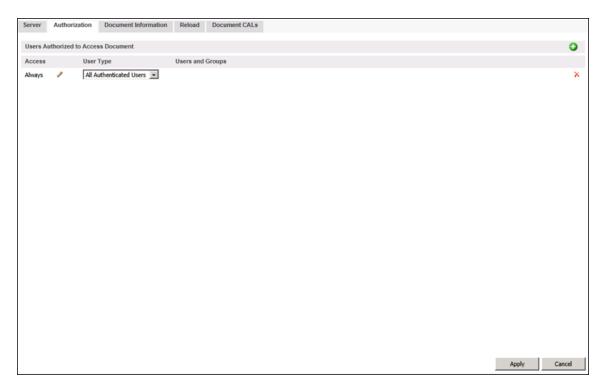
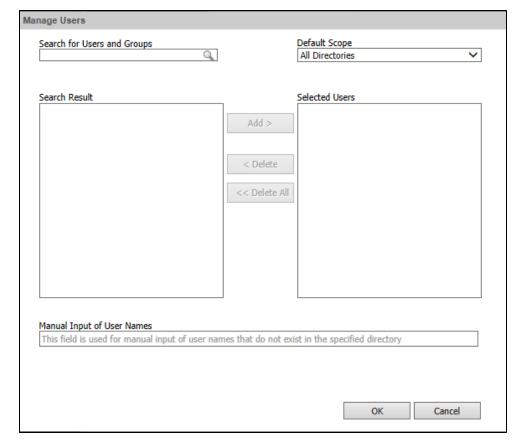


Figure 4-9 QlikView Management Console-Authorization Tab

- 9. In the **Authorization** tab, click **Apply**.
- 10. Close the QlikView Management Console.

To allocate User CALs

- 1. In the **QlikView Management Console**, click the **System** tab.
- 2. Click Licenses.
- 3. Click the QlikView Server on the left pane.
- 4. Click Client Access License (CALs) tab on the right pane.
- 5. Click General.
- 6. Ensure Allow dynamic CAL assignment is selected.
- 7. Click Assigned CALs.
- 8. Click



The Manage Users dialog box is displayed.

Figure 4-10 Manage Users dialog box

- 9. In the Manual Input of User Names text box, type <default domain name\login name>.
- 10. Click **OK**.
- 11. List of licenses are displayed in the **Assigned Users** section on the right pane.
- 12. Click Apply.

Adding Aptean Service Gateway (ASG) to QlikView Server White List

To Add ASG to QlikView Server White List

- 1. Open Windows Explorer and type C:\ProgramData\QlikTech\WebServer.
- 2. Locate the config.xml and open it with Notepad as administrator.
- 3. Locate the **GetWebTicket XML** section and replace it with the IP address of the computer on which ASG will be installed:

<GetWebTicket url="/QvAjaxZfc/GetWebTicket.aspx">

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```
<TrustedIP>99.999.999.999
<TrustedIP>127.0.0.1</TrustedIP>
</GetWebTicket>
```

4. Save the changes to the config.xml file and close it.



Marning: While saving the configuration file, ensure that you retain the .xml file extension.

Install Aptean Service Gateway

After installing the QlikView Server and configuring Analytics, you now must install Aptean Service Gateway. To install Aptean Service Gateway, see Aptean_Analytics_Pivotal_Sales_ASG_ Installation_Guide.pdf.

Installation Guide