



## Reference Manual

*Version 1.1 for QlikView™ Server 11 and 11.20*

---

*Copyright © 2014 Infinity Insight, Inc. All Rights Reserved. Reproduction of distribution of any part of this document or the software is illegal and strictly prohibited without the express written consent of Infinity Insight, Inc.*

*iinsight™, the iinsight™ logo, and the iinsight™ quadrant icons are trademarks of Infinity Insight, Inc.*

*QlikView™ is a trademark of QlikTech International AB.*

*Microsoft®, Windows®, and Internet Explorer® are registered trademarks of Microsoft Corporation.*

*Safari® is a registered trademark of Apple, Inc.*

*Mozilla® and Firefox® are registered trademarks of Mozilla.*

*Google™ and Chrome™ are trademarks of Google, Inc.*

*Opera™ is a trademark of Opera Software ASA.*

---

# Contents

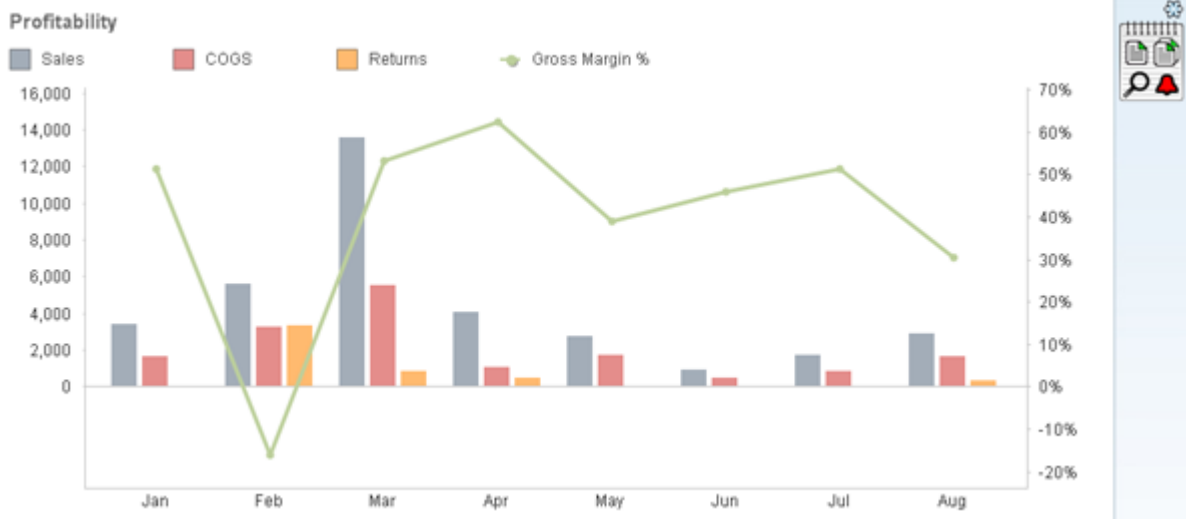
<b>Overview .....</b>	<b>1</b>
<b>Installation .....</b>	<b>2</b>
Requirements .....	2
Installing iinsight.....	3
<i>Post-Installation</i> .....	4
<b>Configuration .....</b>	<b>6</b>
Licensing.....	6
<i>License Overview</i> .....	7
<i>Manual License Assignment</i> .....	7
<i>License Review</i> .....	9
User Rights .....	10
Group Assignment .....	11
User Management .....	12
<i>Short Name</i> .....	12
<i>User Deletion</i> .....	13
Document Settings.....	13
<i>Exclude Fields</i> .....	14
<i>Toolbar Icons</i> .....	16
<i>Enabling/Disabling Bookmarks</i> .....	16
<b>Getting Started .....</b>	<b>17</b>
Adding iinsight to QlikView Applications .....	17
<i>Add the Extension</i> .....	17
<i>Configure the Extension</i> .....	19
<i>Hide the Extension</i> .....	20
Icon Positioning.....	22
<b>Using iinsight .....</b>	<b>24</b>
iinsight Notes .....	24
<i>Creating Notes</i> .....	24
<i>Recalling Notes</i> .....	24
iinsight Recap .....	26
<i>Creating Notes</i> .....	26

---

<i>Recalling Notes</i> .....	27
iinsight Search .....	28
iinsight Notifications .....	29
<i>Sending Notifications</i> .....	29
<i>Viewing Notifications</i> .....	30
Comments .....	31
Bookmarks .....	32
<i>Bookmark Maintenance</i> .....	32
<i>Manual Bookmark Creation</i> .....	33
<b>Modifying Notes</b> .....	<b>34</b>
Editing Notes .....	34
Deleting Notes .....	34
Modifying Existing Note Selections .....	35
<b>Security</b> .....	<b>37</b>
Securing the Management Console .....	37
Note Security .....	40
<b>Troubleshooting</b> .....	<b>42</b>

# Overview

**iinsight** is the ultimate collaboration tool for QlikView™, allowing users to share insights with each other at the click of button.



**iinsight Notes** (1) note

<b>Order Year:</b> 2013	<b>Order Year:</b> 2013
<b>Product Category (short):</b> Office	<b>Product Category (short):</b> Office
<b>Region (short):</b> Yukon	<b>Region (short):</b> Yukon

Current Selections

☐

Current Selections  
Victor Stevens 12/21/2013 11:38 AM  
2013 Office sales in Yukon are lagging

With **iinsight**, you no longer have to leave QlikView™ to share insights with other users. Simply add a note with **iinsight** and make collaboration a snap!

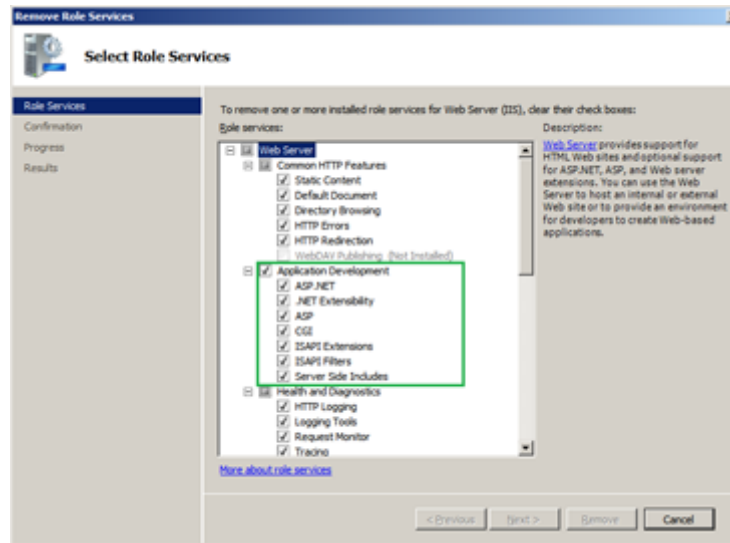
---

# Installation

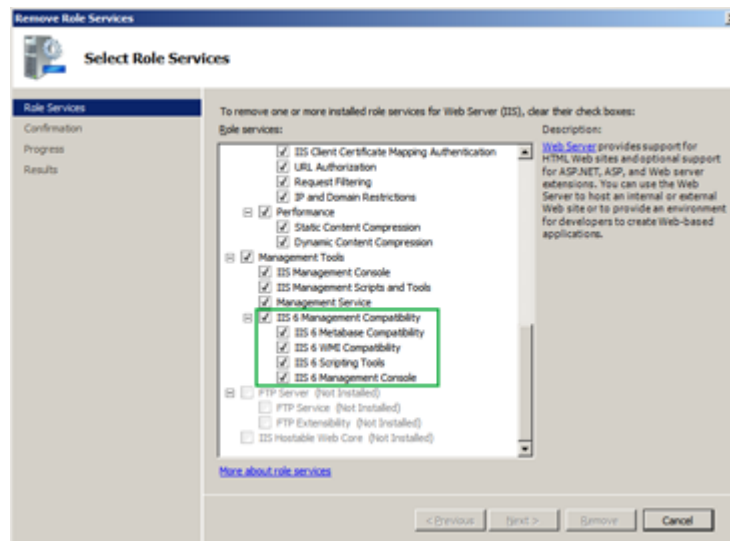
## Requirements

The minimum installation requirements for **iinsight** are:

- Microsoft ® Windows ® Server 2008 R2 or Microsoft ® Windows ® Server 2003
- Microsoft ® .NET Framework 4.0
- Microsoft ® Internet Information Server (IIS)
  - Development Tools (ASP.NET and ASP) enabled



- Microsoft ® Internet Information Server (IIS) 6 Management Compatibility and all sub-services enabled (in Windows ® Server 2008 R2)



- 
- Supported client web browser platforms include:
    - Windows ® Internet Explorer ® 8, 9, and 10
    - Safari ® 5.1.7 (desktop)
    - Safari ® 8536.25 (iPad 2, iOS 6.1.3)
    - Mozilla ® Firefox ® 23
    - Google Chrome 29
    - Opera 16

In addition, *iinsight* must be installed on the same machine, and web site, that runs QlikView Web Server or the QlikView IIS Virtual Applications (whichever configuration is enabled).

## Installing iinsight

*iinsight* is installed from a single MSI file. The installation must be performed by a user who is an Administrator on the local machine. Once the file has been downloaded, double-click it to start the installation:

1. When the Welcome dialog opens, read the information and click **Next**.
2. On the Select Installation Address dialog, choose the following parameters:
  - a. **Site**: select the same IIS web site that contains the QlikView virtual applications. Note that if QlikView Web Server is enabled rather than QlikView's IIS web server, **Default Web Site** should be selected here (or whichever web site is bound to port 80).
  - b. **Virtual Directory**: this is the name of the virtual application that the installer will create. This should typically be left at the default setting of **iinsightService**.
  - c. **Application Pool**: select the IIS application pool that should be used to run the *iinsight* virtual application. The following settings are recommended for maximum compatibility:
    - i. If QlikView is hosted by IIS: select the application pool that runs the QvAjaxZfc virtual application (by default, **QlikView IIS**).
    - ii. If QlikView is hosted by QlikView Web Server:
      - Create a new application pool in IIS that runs under an account that is a member of both the QlikView Administrators and the Administrators group on the local machine;

- 
- Ensure that the application pool has .NET Framework v4.0 enabled;
      - Start the application pool in IIS; and
      - Select this application pool in the installer.
    - d. Click **Next** to continue.
  - 3. The installation is now ready to start. On the Confirm Installation dialog, click **Next** to start it.
  - 4. In the Installation Complete dialog, click **Close** to complete the installation.

## Post-Installation

On Windows ® Server 2008 R2, the installer automatically adds the *iinsight* extension support files to two directories on the machine on which the installer is run:

1. %USERPROFILE%\AppData\Local\QlikTech\QlikView\Extensions\Objects (for the %USERPROFILE% of the installing user)
2. C:\ProgramData\QlikTech\QlikViewServer\Extensions\Objects

On Windows ® Server 2003, the installer automatically adds the *iinsight* extension support files to two directories on the machine on which the installer is run:

1. %USERPROFILE%\Local Settings\Application Data\QlikTech\QlikView\Extensions\Objects (for the %USERPROFILE% of the installing user)
2. C:\Documents and Settings\All Users\Application Data\QlikTech\QlikViewServer\Extensions\Objects

If the installing user will be the one adding the *iinsight* extension to QlikView™ applications, and the QlikView Server™ is installed on the same machine as the web server, no additional configuration is needed.

If the QlikView Server™ is installed on a different machine than the web server, the extension files must be manually copied from either of the directories above to either (a) the C:\ProgramData\QlikTech\QlikViewServer\Extensions\Objects folder on the QlikView Server™ on Windows ® Server 2008 R2 machines, or (b) the C:\Documents and Settings\All Users\Application Data\QlikTech\QlikViewServer\Extensions\Objects folder on the QlikView



---

Server™ on Windows® Server 2003 machines. Simply copy the entire “iinsight” folder to the appropriate directory.

To allow users other than the installing user to add the **iinsight** extension to QlikView™ applications, the extension files must be manually copied from either of the directories above to either (a) the %USERPROFILE%\AppData\Local\QlikTech\QlikView\Extensions\Objects folder on Windows® Server 2008 R2 machines for the desired user (on the machine on which the user will be adding the extension), or (b) the %USERPROFILE%\Local Settings\Application Data\QlikTech\QlikView\Extensions\Objects folder on Windows® Server 2003 machines for the desired user (on the machine on which the user will be adding the extension). Simply copy the entire “iinsight” folder to the appropriate directory.

For details on adding the **iinsight** extension to QlikView™ applications, see the [Adding iinsight to QlikView Applications](#) section, below.

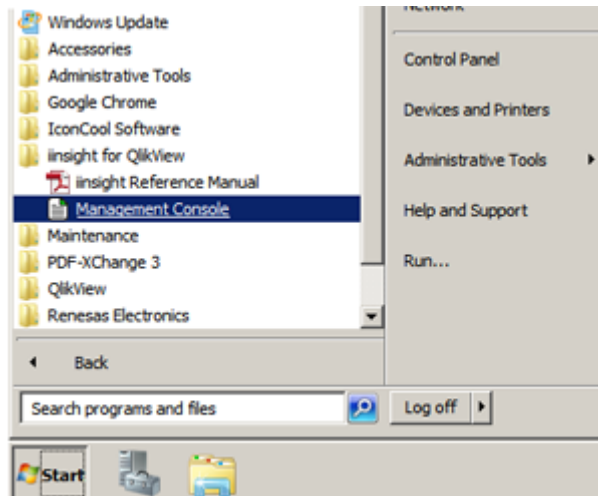
All **iinsight** data (notes, license information, etc.) is stored in an encrypted database that resides in the “App\_Data” folder of the iinsightService root directory. If **iinsight** is installed to the Default Web Site, this database will be located in the following folder:

C:\inetpub\wwwroot\iinsightService\App\_Data. It is recommended that the database be backed up on a daily basis as part of the regular corporate disaster recovery plan that is in place on the **iinsight** server.

---

# Configuration

Almost all *iinsight* configurations are performed through the Management Console that is automatically installed during the product installation. A link to the Management Console can be found under the Start menu of the user that installed *iinsight*.



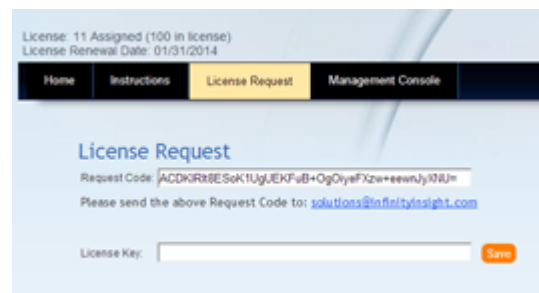
The Management Console can also be opened by accessing the following URL:  
<http://servername/iinsightService/admin> (where **servername** is replaced by the name of the server on which *iinsight* is installed). This URL may be additionally qualified if *iinsight* is installed to a website other than Default Web Site in IIS.

See the [Securing the Management Console](#) section, below, for details on how the Management Console can be secured to allow access by only certain users.

## Licensing

In order to enable functionality of *iinsight* as well as the rest of the Management Console, a valid license must first be applied on the License Request tab.

To obtain a license, please email the Request Code that appears on the License Request tab to [solutions@infinityinsight.com](mailto:solutions@infinityinsight.com). If you have

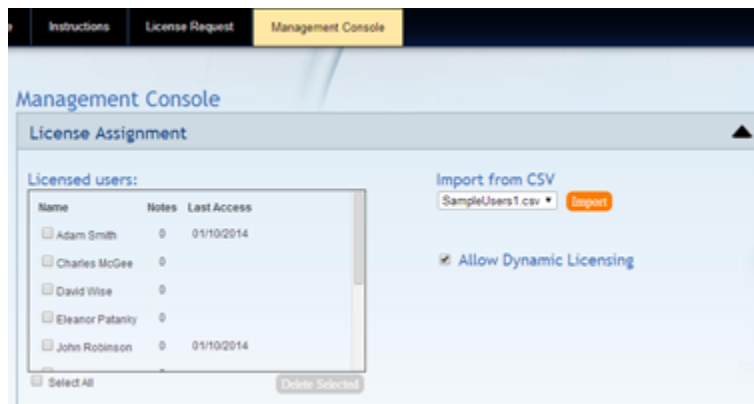


---

purchased a license of the software already, please indicate your organization's name and purchase date in the email. If you are requesting an evaluation license, please fill out the **iinsight** evaluation form here: <http://www.infinityinsight.com/iinsight>.

The Management Console tab can be accessed once a valid license key has been entered.

## License Overview



**iinsight** uses per-user-per-web server licensing. A user who has a license assigned can use the software in an unlimited number of applications (as long as the applications are served by a single web server).

By default, licenses are assigned on a first-come, first-served basis, while licenses are available. Assuming a license is available, a user will be automatically assigned a license the first time he accesses an application that has the **iinsight** extension added. This dynamic license assignment can be disabled by unchecking the ☒ **Allow Dynamic Licensing** checkbox under the License Assignment panel.

If, for whatever reason, a user does not have a license when accessing an application that has the **iinsight** extension added, the user will not see any of the **iinsight** components.

## Manual License Assignment

If the “Allow Dynamic Licensing” checkbox has been unchecked, users who already have licenses assigned will retain their licenses. New users, however, will not be automatically

assigned a license. To license new users, new users must be added to a .CSV file, which must then be saved to the “useraccess” folder in the **iinsight** folder structure. If **iinsight** has been installed to the Default Web Site in IIS, this folder will be located here:

C:\inetpub\wwwroot\iinsightService\admin\useraccess. The CSV file must be structured as follows:

1	UserName	AccessRight	ShortName
2	mycomp\JohnDoe	2	John Doe
3	mycomp\JaneDoe	2	Jane Doe
4	mycomp\Reader	3	John Smith
5	mycomp\CompAdmin	1	Jane Smith

where the first row contains the header row

#### **UserName,AccessRight,ShortName**

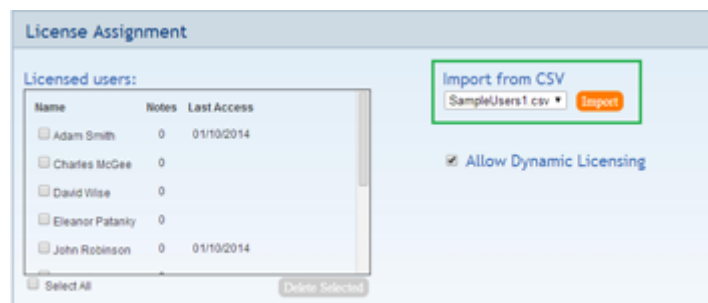
and subsequent rows contain the following information, per column:

1. **UserName:** Each user’s username, as it will be resolved by the QlikView Server. Typically, this should be specified in domain\username format but may be different, particularly if DMS authentication is used by the QlikView Server™. The general rule is that usernames should be specified in the format in which QlikView Server™ will interpret function **OSUser()** (see the [Configure the Extension](#) section, below).
2. **AccessRight:** This should be specified as either **1** (Admin), **2** (Editor) or **3** (Reader).
  - *Note:* this column is optional. If omitted, Editor-level access will be assumed.
3. **ShortName:** Use this column to specify the “friendly” Short Name that should be assigned to each user. This name will be used as an alias everywhere in the software (note authorship, notifications, etc.).
  - *Note:* this column is optional. If omitted, **UserName** will be used.

In order to actually assign licenses to users in CSV files, the CSV must be imported:

The list of available CSV files will be automatically populated based on the contents of the “useraccess” folder.

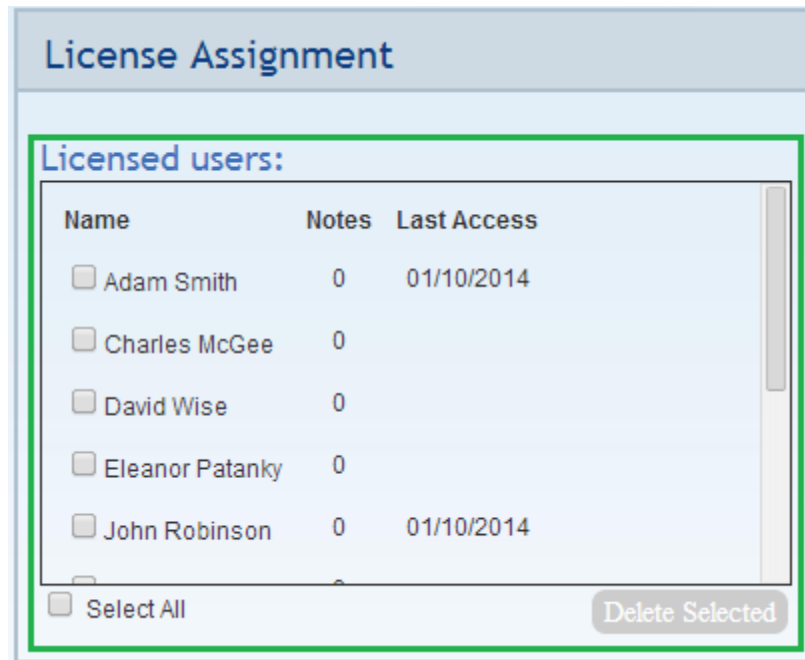
Select the CSV file you wish to import, and press the **Import** button.



---

*Note:* is a user (based on the **UserName** column in the CSV) already has a license assigned, the **AccessRight** and **ShortName** columns from the CSV will be used to update the user's access rights and Short Name, respectively.

## License Review



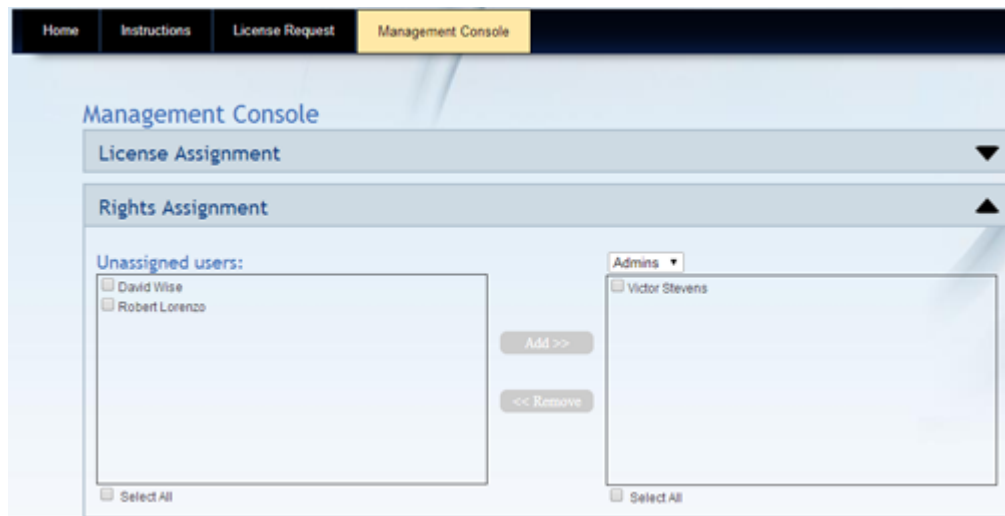
The License Assignment panel also allows for review of licensed users, as well as certain properties of those users.

- **Name:** Will display each user's username or Short Name (if configured).
- **Notes:** Will indicate how many notes, across all applications, that user has authored.
- **Last Access:** Will indicate the latest date, if any, that the user has accessed any application that has the *iinsight* extension added.

This panel can also be used to unassign user licenses. To unassign licenses from a user, check the checkbox next to that user's name and press the Delete Selected button. This will remove the user's license, but will not delete any notes/comments that the user has authored. To permanently remove a user and that user's notes/comments, see the [User Deletion](#) section, below.

---

## User Rights



User rights can be assigned under the Rights Assignment panel. There are three possible rights that can be assigned to each user:

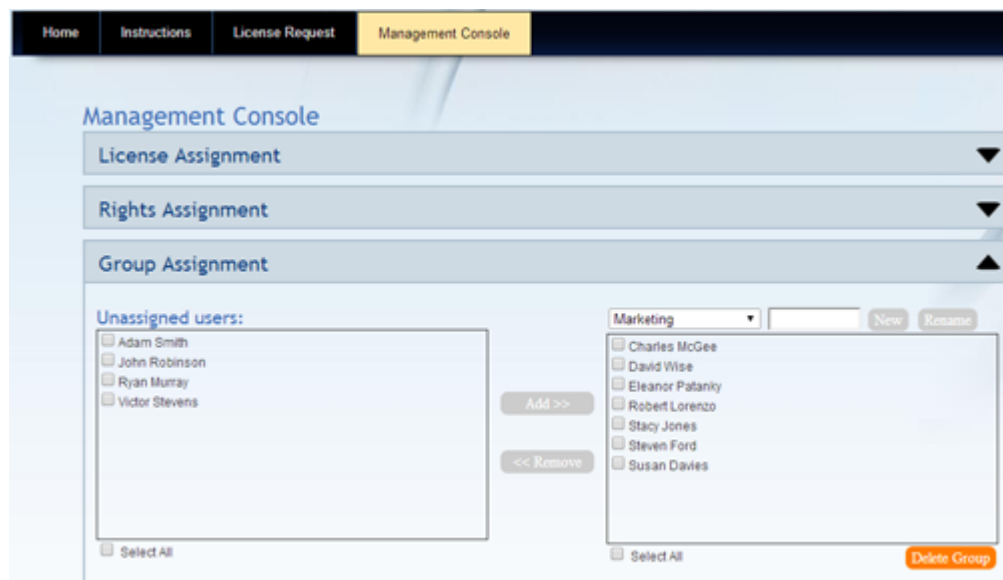
1. **Editor:** Editors have the following permissions:
  - a. Create new notes;
  - b. Edit or delete their own notes;
  - c. Delete their own comments to other users' notes;
  - d. Delete all users' comments to their own notes;
  - e. Set, modify or remove security on their own notes; and
  - f. Edit the selection sets associated with their own notes (including manually recreating note bookmarks).
2. **Admin:** Admins have all permissions that Editors have, plus the following privileges:
  - a. Edit or delete other users' notes;
  - b. Delete other users' comments;
  - c. Set, modify, or remove security on other users' notes;
  - d. Edit the selection sets associated with other users' notes (including manually recreating note bookmarks);
  - e. Under **iinsight Search**, search for notes from applications other than the currently-active application; and
  - f. Under **iinsight Search**, delete all notes returned by a search with a single click.

- 
3. **Reader:** Readers have permission only to view existing notes/comments, and cannot add or edit notes/comments.

Each user can be assigned only a single right. For example, if a user is defined as an Admin, he or she will be an *iinsight* Admin across all applications.

The left panel will display a list of users who have not been assigned rights. By default, these users will be treated as Editors. Users can be moved between the left and right panels using the **Add >>** and **<< Remove** buttons.

## Group Assignment



Users can be assigned to groups using the Group Assignment panel. This feature is useful to, for example, define teams or departments. Once a group has been defined, it can be set to be the recipient of a notification. In addition, a note author (or an Admin) can easily allow an entire group access to a note through the note's security.

### To create a new group

1. Type a group's name in the text field; and
2. When complete, press the **New** button to create a new group.

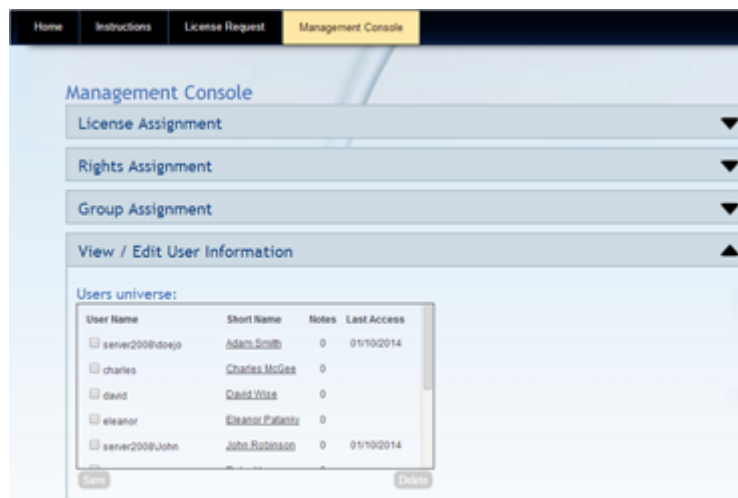
---

### To rename an existing group

1. Select the group you wish to rename in the Group name drop-down menu;
2. Type a new name for the group in the text field; and
3. When complete, press the **Rename** button to rename the group.

Users can be added to, or removed from, a group using the **Add >>** and **<< Remove** buttons, respectively. This is no limit to the number of groups that a user can be a member of.

## User Management



The View/Edit User Information panel can be used for 2 primary purposes: (1) setting a user's Short Name, and (2) deleting a user entirely.

### Short Name

Although, when setting the Short Names of multiple users, it is easier to use the CSV method described in the [Manual License Assignment](#) section, above, it may occasionally be useful to set a single user's Short Name directly from the Management Console. To do so:


1. Click the underlined Short Name value of a user in the list (equal to the user's username, by default);
2. In the resulting text box, enter a new value for the Short Name;
3. When complete, press Enter; and
4. Press the **Save** button to finalize changes.



---

## User Deletion

Unlike license deletion, discussed above, which deletes a user's license but keeps notes/comments that the user authored, the deletion option that is available in the View/Edit User Information panel will permanently delete (a) the user's license, (b) notes on which the user is marked as an author, (c) comments on which the user is marked as an author, and (d) notifications that the user sent to other users.

To delete a user permanently, check the checkbox next to the user, and press the  button. When prompted for confirmation, press **OK** to confirm that you want to delete the user.

## Document Settings



The screenshot shows the 'Management Console' interface. At the top is a navigation bar with tabs: 'Home', 'Instructions', 'License Request', and 'Management Console' (which is highlighted). Below the navigation bar, the 'Management Console' section is expanded, showing a list of options: 'License Assignment', 'Rights Assignment', 'Group Assignment', 'View / Edit User Information', and 'Document Settings' (which is selected and has an upward arrow). The 'Document Settings' panel contains the following elements: a 'Select Document' dropdown menu with 'Demo Files/Infinity Insight Demo' selected, a 'Delete Document' button, an 'Excluded Fields' text input field with the placeholder 'semicolon (;) delimited', two checkboxes labeled 'Use Toolbar Icons' (unchecked) and 'Use Bookmarks' (checked), and a 'Save Settings' button at the bottom.

**iinsight** allows three advanced document-level settings to be set: (1) Exclude Fields, (2) Toolbar Icons, and (3) Enabling/Disabling Bookmarks. A QlikView™ application that has the **iinsight** extension added will automatically appear in the list in the Document Settings panel after the first time it is opened in a client browser.

---

## Exclude Fields

**iinsight** will base the selection set for each note on the application's "reported" Current Selections at the time of note creation—this means that the software will automatically respect the invisibility of system fields (e.g. **\$Field**) as well as hidden fields (i.e. those fields whose names begin with the definition of system variable **HidePrefix**). **iinsight** will not include these fields in a note's selection state, even if a user has values of these fields selected when he or she creates a note.

**iinsight** "Exclude Fields" allow for additional fields to be excluded from notes' selection sets. Essentially, these fields will be invisible for **iinsight** only.

Exclude Fields are not designed to be a replacement for HidePrefix, which will cause **iinsight** to create bookmarks in a different way.

Because the **iinsight** bookmarks that automatically attach to notes are actually QlikView Server™ bookmarks, they function differently when an Exclude Field is part of a user's Current Selections at the time of note creation. Because Exclude Fields are invisible to **iinsight** but not to QlikView™ itself, **iinsight** will not create the bookmark automatically. Rather, **iinsight** will present the user with an option to create the bookmark manually at a later time, when the Exclude Field value(s) are not selected. The exact process that **iinsight** will follow for bookmark creation in such a situation is as follows:

**Step 1:** The note's author has an Exclude Field selected at the time of note creation. The Exclude Field will not be included as part of the note's selection state. A bookmark will not be automatically attached to the note.

**Step 2:** Once a user's current selection state matches the note's selection state (without any Exclude Fields), an Add Bookmark icon (★+) will appear next to the note in place of the standard Restore Bookmark icon (★). This icon will only be visible to the note author and to users with Admin permissions.

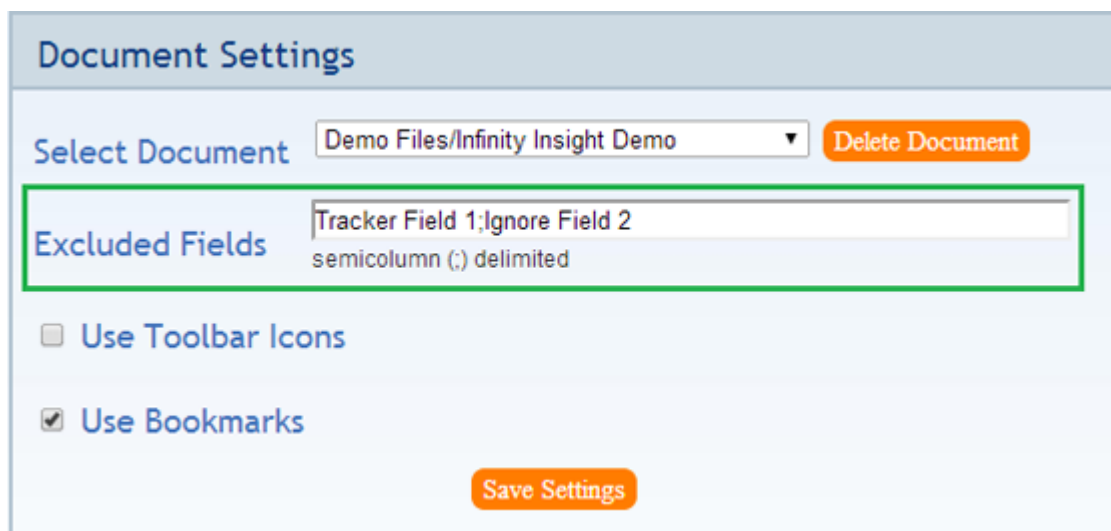
**Step 3:** Once a user is satisfied with the current layout view, he or she can press the ★+ icon. This will create a bookmark and attach the bookmark to the note in question. The ★+ icon will be replaced by the standard ★ icon.

---

By contrast, fields that are “excluded” by HidePrefix will be invisible to all of QlikView™ (including *iinsight*), but will be included in bookmarks. The HidePrefix system variable would be preferable, for example, if you wish to exclude from *iinsight* note selections a radio button list box. Because radio buttons always have a value selected, defining it as an Exclude Field rather than with HidePrefix will ensure that a bookmark will never be automatically created for any notes!

Finally, Exclude Field definitions are not reversible. Meaning, if a note that includes Field1 as part of its selection state is created while Field1 is defined as an Exclude Field and, subsequently, Field1 is removed from the list of Exclude Fields, the note will not retroactively become associated with value of Field1 at the time of note creation.

#### Defining Exclude Fields



The screenshot shows the 'Document Settings' dialog box. At the top, there's a 'Select Document' dropdown menu with 'Demo Files/Infinity Insight Demo' selected, and a 'Delete Document' button. Below this is the 'Excluded Fields' section, which is highlighted with a green border. It contains a text input field with the text 'Tracker Field 1;Ignore Field 2' and a label 'semicolon (;) delimited' below it. Underneath the 'Excluded Fields' section, there are two checkboxes: 'Use Toolbar Icons' (unchecked) and 'Use Bookmarks' (checked). At the bottom right of the dialog is a 'Save Settings' button.

Exclude Fields should be defined as follows:

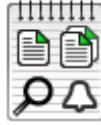
- Semicolon delimited;
- Field names are case sensitive; and
- Square brackets need not be used, even if the field name of a field contains special characters (so *My Field* can be defined instead of *[My Field]*).

When you have finished defining desired Exclude Fields, press the **Save Settings** button to save changes.

---

## Toolbar Icons

The default **iinsight** software view will display the 4 component icons in a quadrant that can be positioned at will within each application and sheet.



A second user interface option is available by checking the ☐ **Use Toolbar Icons** checkbox, which will instead install the **iinsight** icons into QlikView's built-in AJAX toolbar.



Press the **Save Settings** button to save changes.

## Enabling/Disabling Bookmarks

By default, **iinsight** will automatically create bookmarks for each unique set of note selection states. These bookmarks will attach to notes to allow users to recall a QlikView™ selection and layout state associated with a note with just a single click. If, for whatever reason, you wish to disable bookmark creation/attachment, that can be accomplished by unchecking the

☒ **Use Bookmarks** checkbox in the Document Settings panel. Press the **Save Settings** button to save changes.

---

# Getting Started

Before **iinsight** can actually be used in QlikView™ applications, some minimum configurations must be performed. These configurations should typically be done by an **iinsight** Administrator (a user who has been assigned Admin permissions in the Management Console) who also has read/write permissions on the QlikView™ applications in question. In addition, if Section Access has been enabled on the application, it is often helpful if the configuring user also has ADMIN permissions in Section Access.

## Adding iinsight to QlikView Applications

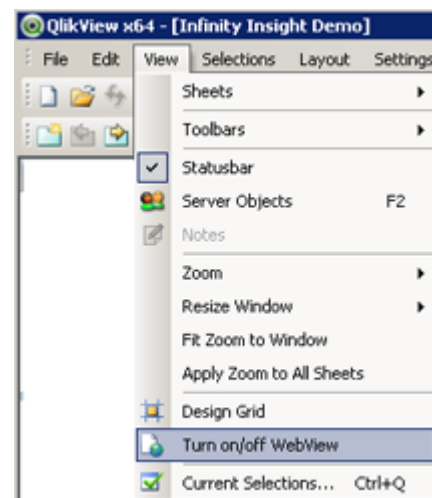
**iinsight** is a combination of two components: a web service and a QlikView™ extension object. In order for the two components to be able to interact with each other, the **iinsight** extension must be added to QlikView™ applications.

The **iinsight** extension must be added in QlikView Desktop™. For simplicity, it is recommended that configurations be performed on the same machine onto which **iinsight** has been installed. However, it is possible to add the extension from another machine. See the [Post-Installation](#) section, above.

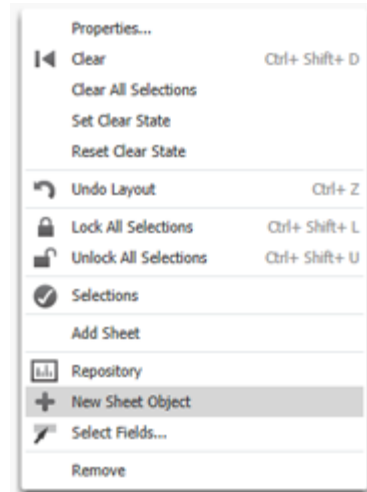
## Add the Extension

**Step 1:** Open the application to which **iinsight** should be added. This should be an existing QVW that has at least one field in the data model.

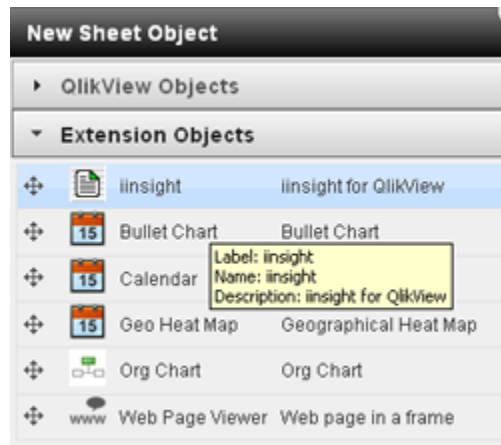
**Step 2:** Under the View menu, activate  
WebView



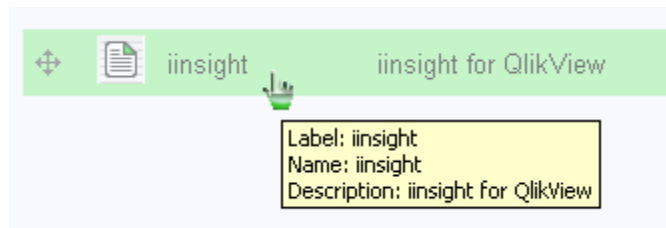
**Step 3:** Right-click on a blank part of the active sheet, and select **New Sheet Object**



**Step 4:** Select the “Extension Objects” panel and locate the *iinsight for QlikView* extension



**Step 5:** Drag the extension onto any part of the sheet



**Important:** Because of the nature of QlikView™ object initialization and session recovery, unless your QlikView™ application has been configured to always start on a particular sheet AND session recovery has been disabled in the QlikView Management Console, the *iinsight* extension must be created on each and every sheet. *iinsight* will be initialized for a user the first time it is encountered in a given session. Therefore, if a user begins his or her session on a sheet that does not have the *iinsight* extension added, the *iinsight* icons will not be

---

iinsight for QlikView v1.1

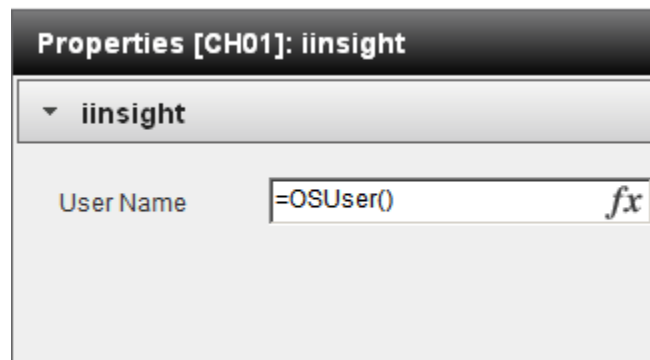
---

displayed (until the user activates the sheet with the extension). For this reason, it is highly recommended to add the extension to all document sheets.

With regard to sessions that begin on user-created sheets, since it is not possible for anyone except the sheet owner to add objects to these sheets, users will need to add the **iinsight** extension to the sheet themselves (or, in each session, activate a document sheet that has the extension added). The procedure for this is the same as what is described in this section, except it should be performed directly through the Full Browser Client, rather than through WebView in QlikView Desktop™.

## Configure the Extension

The **iinsight** installer automatically configures the extension object with all settings that are specified during installation. However, a single admin-configurable setting is exposed in the extension object properties. To view the extension settings, ensure that QlikView Desktop™ is in WebView mode, right-click on the extension object, select **Properties**, and open the “iinsight” panel.



This **User Name** setting controls how **iinsight** authenticates users for purposes of note authorship, notifications, permissions, and security. The only valid functions for this setting are **=OSUser()** and **=QVUser()**.

- OSUser() will return the username of the current user as set by the operating system or by AccessPoint/SSO authentication.
- QVUser() will return the username of the current user as set by QlikView™ Section Access.
- *Default Value:* =OSUser()

---

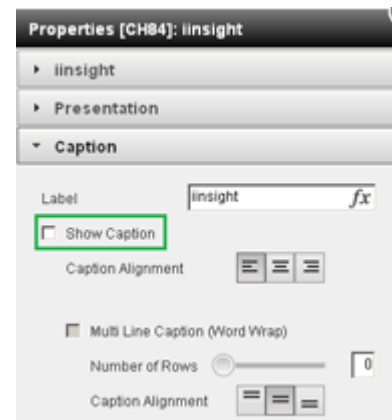
**Note:** All *iinsight* extension objects in a given QlikView™ application must be configured with identical User Name settings. After the extension has been configured as needed in one document sheet, it is recommended that it simply be copied to all other sheets. This will save configuration time, since copying a QlikView object retains all object settings.

## Hide the Extension

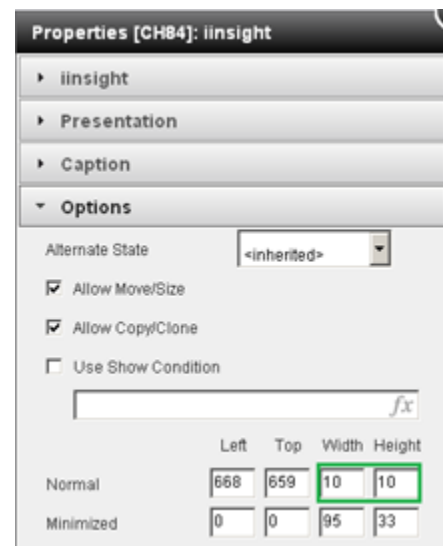
It is recommended, for aesthetic purposes, that the extension object itself be “hidden.” Truly hiding the extension (by setting a false display condition) will result in *iinsight* not functioning at all, however. The simplest way to hide the extension for aesthetic purposes is to hide it behind another object by performing the following steps on each sheet:

**Step 1:** Open the relevant application in QlikView™ Desktop. With WebView mode enabled, right-click the extension object and select **Properties**.

**Step 2:** Select the “Caption” panel and uncheck the **Show Caption** checkbox.

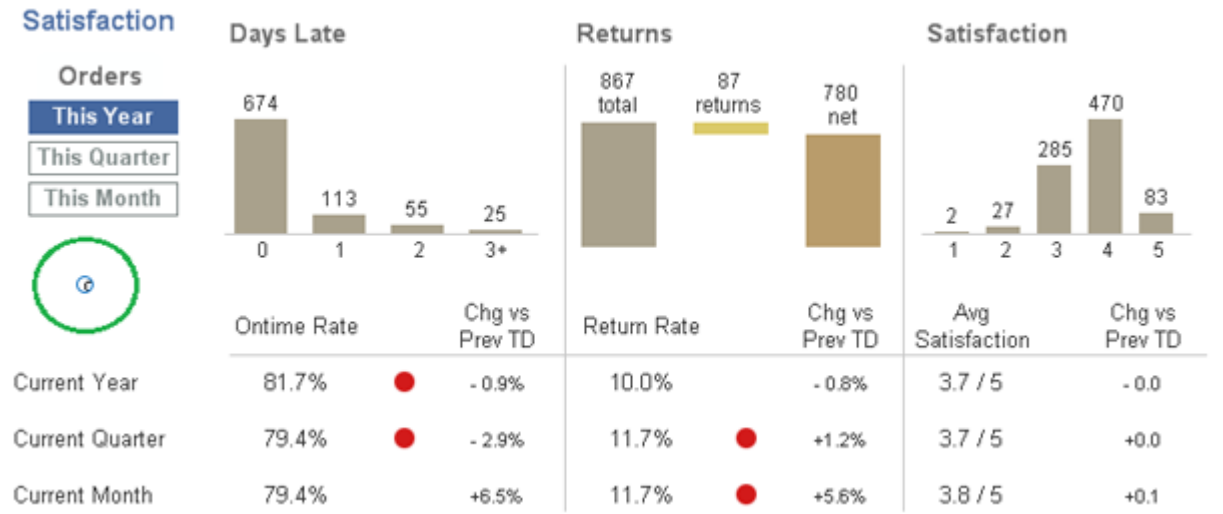


**Step 3:** Select the “Options” panel and set the “Normal” width and height to a small number (for example, 10 and 10).



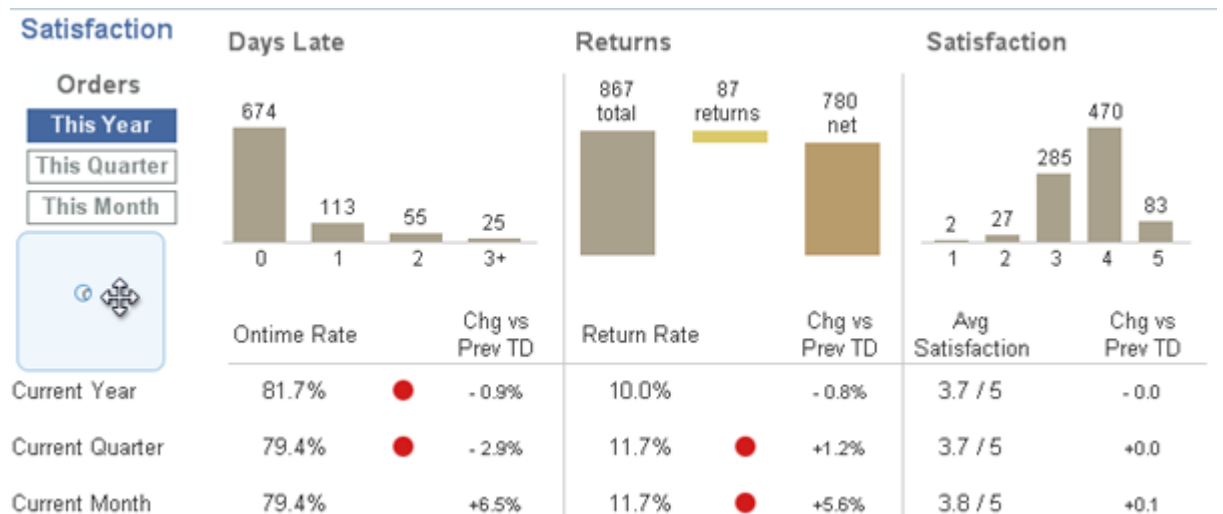


**Step 4:** Disable WebView mode, and position the extension object in an inconspicuous area in your application that is not typically clicked by users.

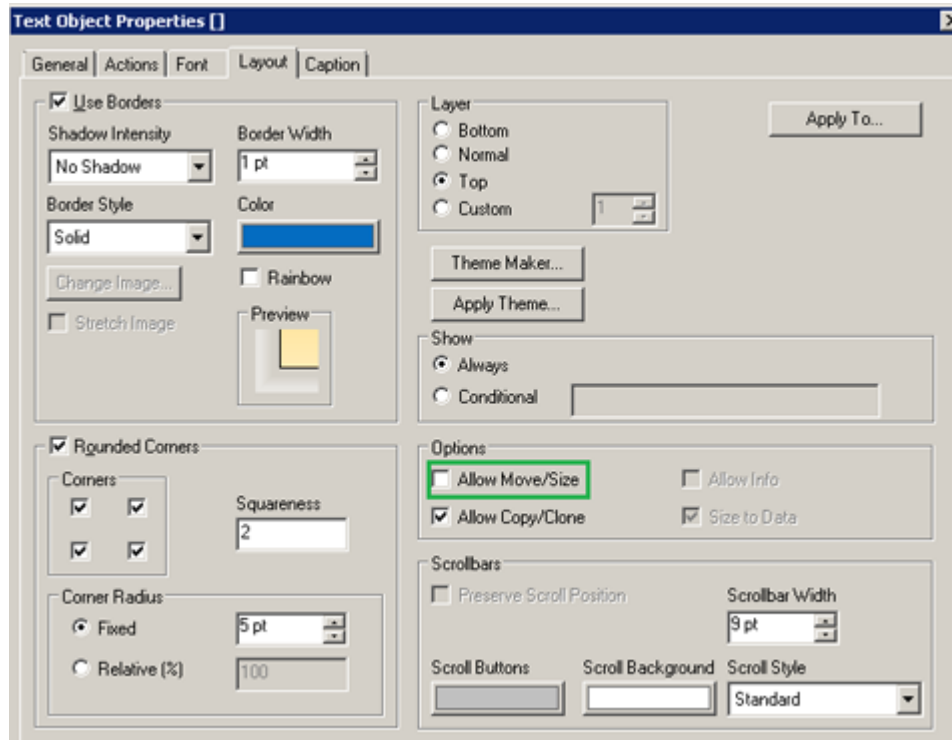


**Step 5:** Create a new text object and set the background color of this text object to match your sheet background. Under the **Layout** tab in the text object **Properties**, ensure that the "Layer" is set to **Top**. *Note:* because extension objects reside in the "Normal" layer, this text object will always be rendered above the extension.

**Step 6:** Position the text object directly over the extension object, effectively "hiding" it.



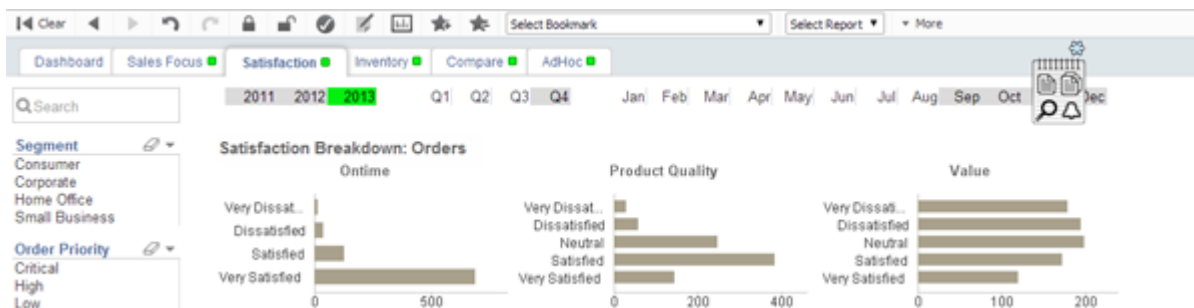
**Step 7:** Reopen the text object **Properties** and return to the **Layout** tab. Uncheck the “Allow Move/Size” checkbox.



**Step 8:** Save and close the application.

## Icon Positioning

By default, and to ensure maximum compatibility with all client screen resolutions, the *iinsight* icons will render at position x=932; y=27.





During each session, users are free to reposition the icons any way they want. However, like all QlikView™ browser sessions, user positioning of *iinsight* icons is not persistent from one iinsight for QlikView v1.1



---

session to the next—this is true for both Editors and Readers. However, users with Admin permissions can (and should) set persistent icon positions to ensure maximum efficiency and aesthetic appeal. Admins can define icons positions uniquely for each sheet in an application.

### Repositioning Icons

To set persistent icon positions, drag the **iinsight** icons (by clicking and holding the spiral binding at the top of the icons) to the desired position on an application sheet. Once the icons are in the desired position, press the  icon. *Note:* The  icon appears for Admins only.

### Hiding/Restoring Icons

To hide icons from an application sheet entirely, press the  above the **iinsight** icons, and then press the  icon.

To restore hidden icons on an application sheet, press the , and then press the  icon.

*Note:* The  icon appears for Admins only.

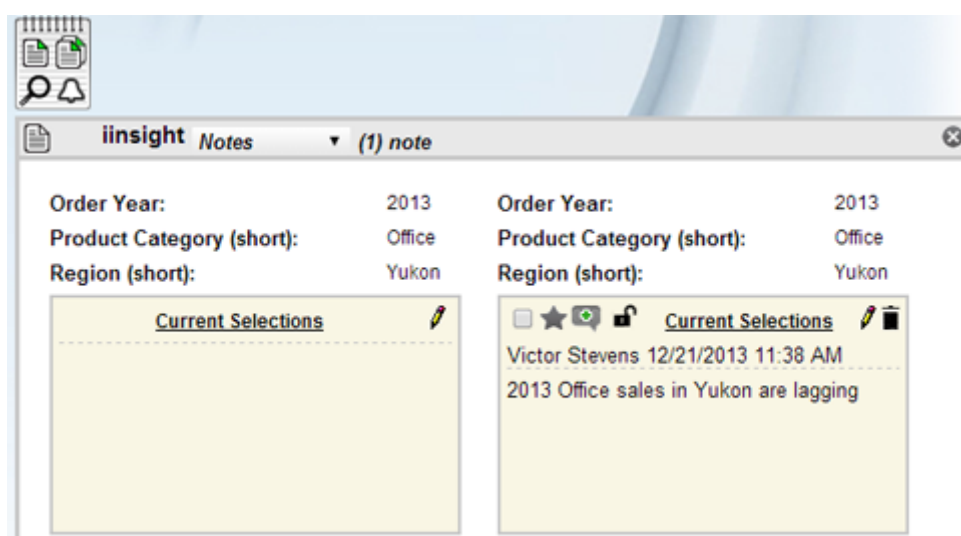
---

## Using iinsight








**iinsight for QlikView™** allows users to collaborate like never before. With **iinsight**, users can create notes in QlikView™ and share insights instantly with teammates. Most importantly, **iinsight** notes are associative—so users of a QlikView™ application will not miss important discoveries shared by their colleagues.




## iinsight Notes



## Creating Notes

To create a new note and associate it with what you currently have selected, simply click the  or  icon. In the **iinsight Notes** or **Recap** interface, click the  icon. Type a note and, when you are ready to save it, click the  icon. To discard changes, press the  icon.

## Recalling Notes

**iinsight** notes are associative, and the **iinsight Notes** icon () will light up () when a user's current selections match the selection state of the note. This is to notify the user, at a glance, that an existing note pertains to his or her current selection state. To view available notes, simply click the  icon to open the **iinsight Notes** interface.

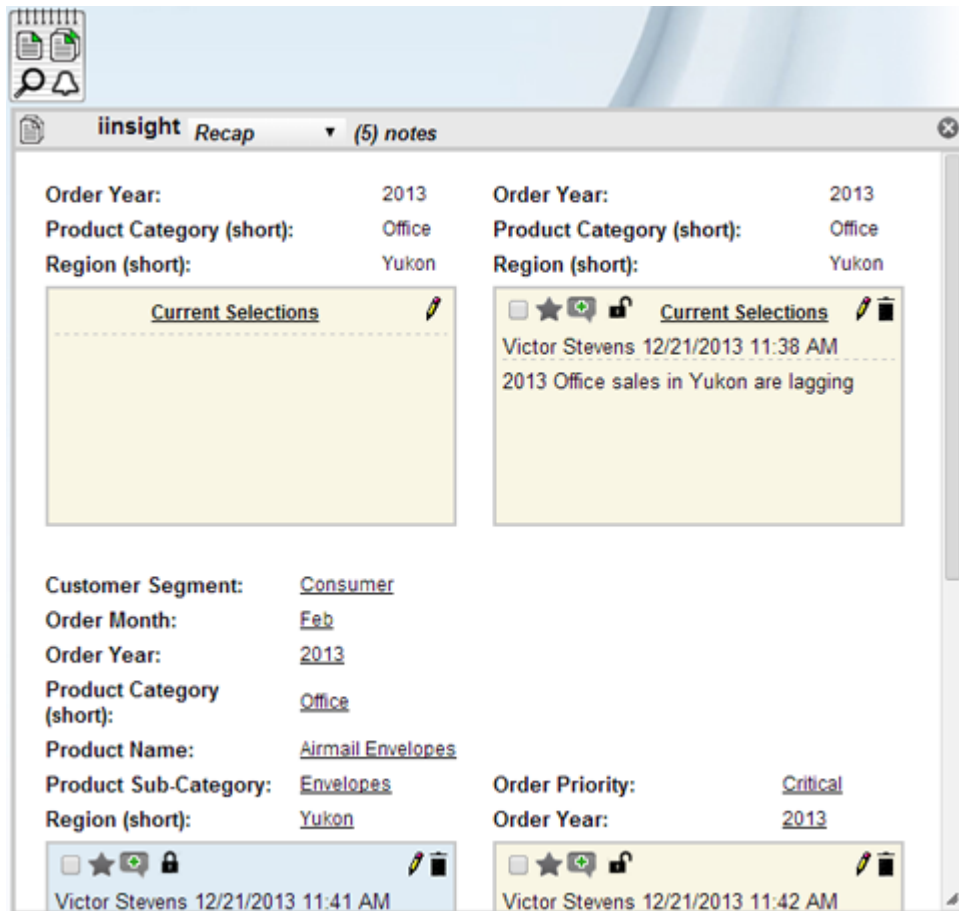
---

Specifically, the **iinsight Notes** icon will light up when any of the following three conditions are met for at least one note:

1. A user's current selection state exactly matches the selection set of the note.
  - Example: A note is associated with:
    - Month = August
    - Year = 2013
  - A user selects August and 2013 only.
2. A user's current selection state contains a subset of the note's selection set, with at least one matching field value for each field.
  - Example: A note is associated with:
    - Month = August, September
    - Year = 2012, 2013
  - A user selects August and 2013 only.
3. Either of the above conditions is met, and the user's current selection state simply adds more detail to the note's selection set by including additional field values for existing fields, or adding extra fields.
  - Example: A note is associated with:
    - Month = August, September
    - Year = 2012, 2013
  - A user selects:
    - Month = August, September
    - Year = 2013, 2014
    - Country = USA






---

## iinsight Recap






**iinsight Recap** is a tool with all the capabilities of **iinsight Notes**, but with broader association logic. The purpose of **iinsight Recap** is to ensure that a user of a QlikView™ application is aware of user-created insights that relate to a similar (but not exactly the same) selection as what he or she is currently viewing.

### Creating Notes

To create a new note and associate it with what you currently have selected, simply click the  or  icon. In the **iinsight Notes** or **Recap** interface, click the  icon. Type a note and, when you are ready to save it, click the  icon. To discard changes, press the  icon.

---

## Recalling Notes

*iinsight* notes are associative, and the *iinsight Recap* icon () will light up () when a user's current selections relates to the selection state of the note. This is to notify the user, at a glance, that an existing note may pertain to his or her current selection state. To view available notes, simply click the  icon to open the *iinsight Recap* interface.

Specifically, the *iinsight Recap* icon will light up when any field value in a user's current selection state matches a field value associated with at least one note. The following are all examples of instances when the *iinsight Recap* icon will light up.

### Example 1

A note is associated with:

- Month = August
- Year = 2013

A user selects:

- Month = August,
- Year = 2013

### Example 2

A note is associated with:

- Month = August, September
- Year = 2013, 2014

A user selects:

- Month = August
- Year = 2013

### Example 3

A note is associated with:

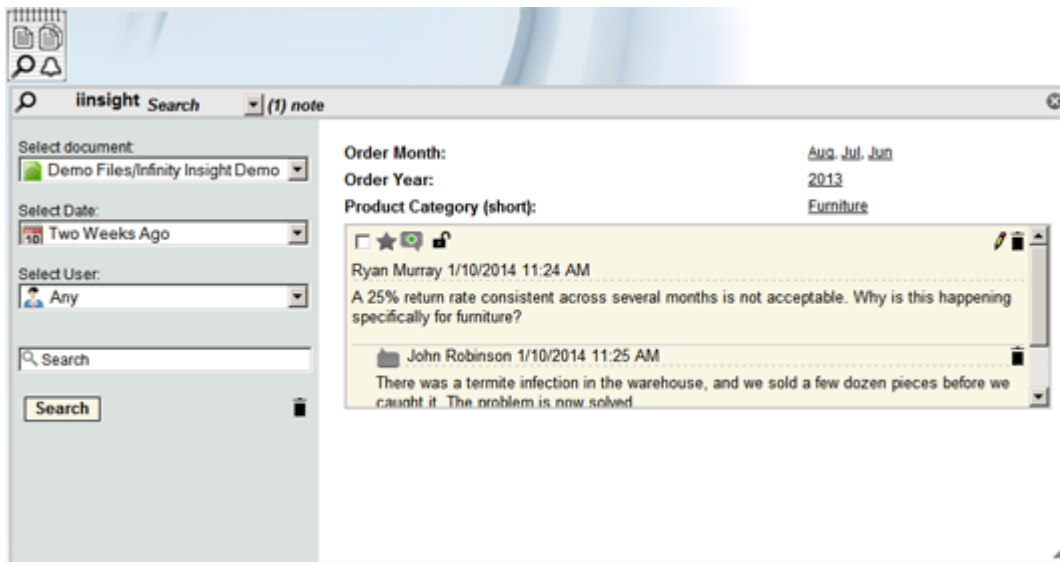
- Month = August, September
- Year = 2013, 2014


A user selects:

- Year = 2013
- Country = USA

---

## iinsight Search

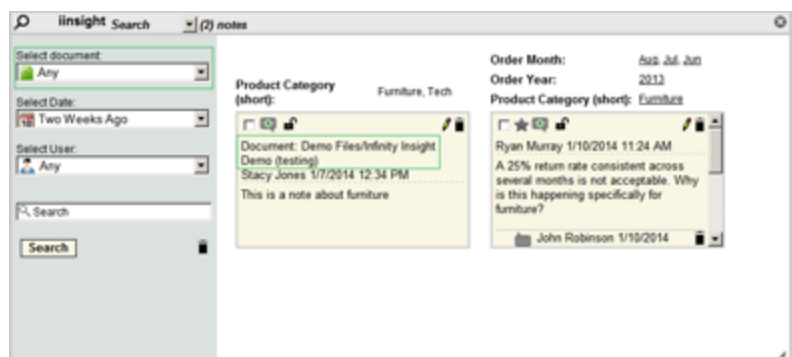


**iinsight Search** can be opened at any time by click on the  icon, and is designed to allow users to quickly search through all notes by: (a) note creation date, (b) note author, and/or (c) note text.




Users who have Admin rights defined in the Management Console (see the [User Rights](#) section, above), also have two additional tools available through **iinsight Search**:

1. Search for notes from applications other than the currently-active application; and
2. Delete all notes returned by a search with a single click.

To search for notes from other QlikView™ applications that have **iinsight** installed, select a different application from the Documents drop-down. If you select “Any” under this drop-down, each note returned by the search will have a “Document” indicator to let you know which application it came from:





To delete all notes returned by a search, enter your search parameters and press the  icon. When prompted for confirmation, press **OK** to confirm that you wish to permanently delete the notes. *Important:* this “global delete” functions based on set search parameters, rather than currently-visible search results. This means that, for example, if you select a particular note author and press the  icon before you press , all notes created by this author will nevertheless be deleted.

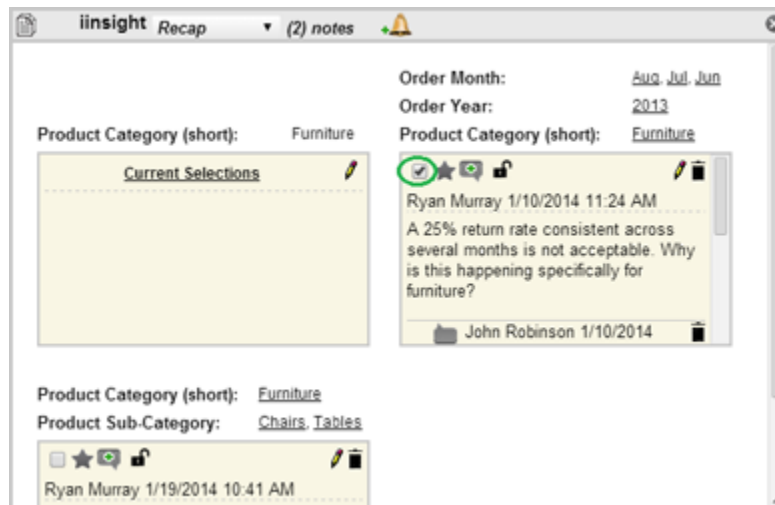
## iinsight Notifications

**iinsight Notifications** is an interface for each user to view notifications sent to him/her by other users. A “notification” in **iinsight** is a simple method to draw a user’s attention to a particular note, rather than waiting for the user to discover it on his or her own.

## Sending Notifications

Any user can send a notification to any other licensed **iinsight** user. To send a notification:

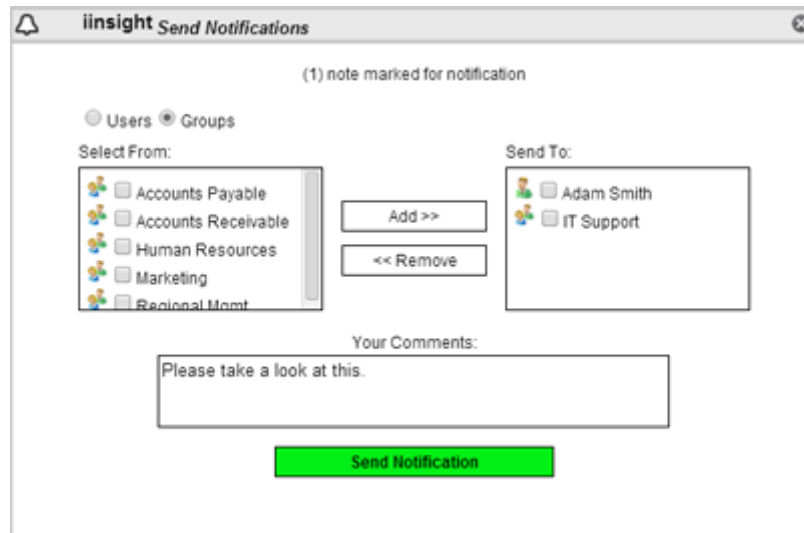
**Step 1:** Check the checkbox next to one or more notes from any **iinsight** interface.



**Step 2:** Press the  icon in the caption:



**Step 3:** Select the desired recipients. Any combination of users and groups can be set as notification recipients. See the [Group Assignment](#) section, above, for more details on defining user groups.






The screenshot shows the 'iinsight Send Notifications' window. At the top, it says '(1) note marked for notification'. Below this are two radio buttons: 'Users' and 'Groups', with 'Groups' selected. Under 'Select From:', there is a list of departments: Accounts Payable, Accounts Receivable, Human Resources, Marketing, and Regional Mgmt. To the right of this list are 'Add >>' and '<< Remove' buttons. To the right of these is a 'Send To:' box containing 'Adam Smith' and 'IT Support'. Below these is a 'Your Comments:' text area with the text 'Please take a look at this.' and a green 'Send Notification' button at the bottom.


**Step 4:** Optionally, add comments to your notification. These comments will appear above the notification.

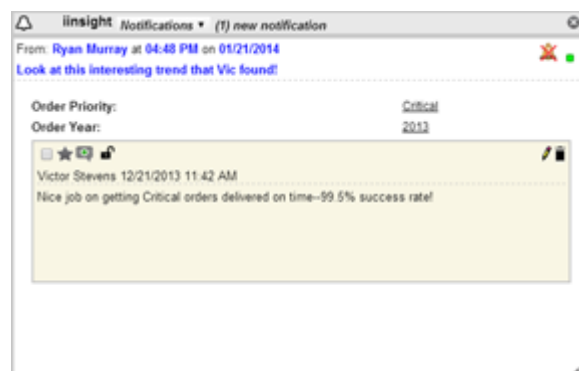
**Step 5:** Press the  button to send the notification.

Recipients will receive notifications either immediately (if they are currently viewing the application) or the next time they open the application.

## Viewing Notifications

When one or more new notifications are available, the  icon will turn red: . To view notifications, press the  icon to open the **iinsight Notifications** interface. This interface will display all notifications, with the newest notifications sorted to the top.

To dismiss a notification so that it no longer appears in the **iinsight Notifications** interface, press the  icon next to the notification.

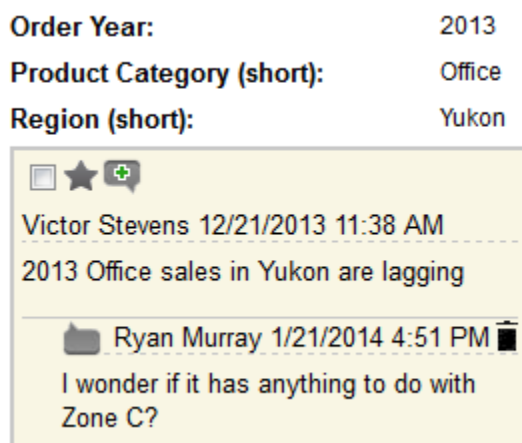





The screenshot shows the 'iinsight Notifications' window. At the top, it says '(1) new notification'. Below this is a notification from 'Ryan Murray at 04:48 PM on 01/21/2014' with the text 'Look at this interesting trend that Vic found!'. Below this is a section for 'Order Priority: Critical' and 'Order Year: 2013'. Below this is a notification from 'Victor Stevens 12/21/2013 11:42 AM' with the text 'Nice job on getting Critical orders delivered on time--99.5% success rate!'. To the right of each notification is a red 'X' icon to dismiss it.

---

## Comments

Users can add comments to existing notes.



To add a comment to a note, press the  icon next to that note. Type a comment and, when you are ready to save it, click the  icon. To discard the comment, press the  icon.

Comments will appear indented under the parent note in the order in which they were added (older comments first). Using comments, it is thus possible to create a conversation chain under a particular note.

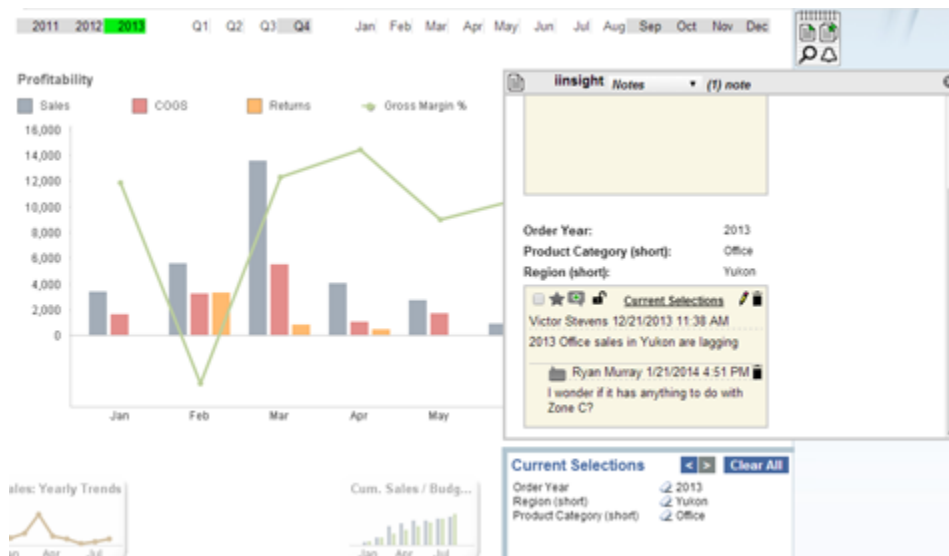
Comments, once saved, cannot be edited. Comments can be deleted by (a) the commenter, (b) the note author, or (c) a user with Admin permissions.

---

## Bookmarks

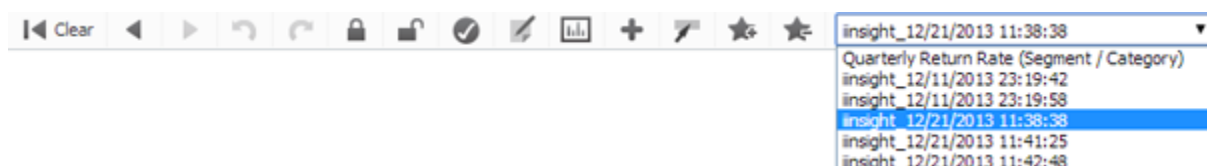
If bookmarks are enabled for a document in the *iinsight* Management Console (see the [Enabling/Disabling Bookmarks](#) section, above), creating a note will also create a bookmark that will be tied to that note. This bookmark will be associated with the note author's current selection state at the time of note creation, as well as his or her document layout.

Users who subsequently come across the note can, with a single click of the ★ icon, instantly restore the document state as it was at the time that the note author created the note. This is often a useful tool to add additional context to a note.



## Bookmark Maintenance

*iinsight* bookmarks are, in reality, QlikView Server™ bookmarks that *iinsight* creates automatically for the user. Unavoidably, each user will be able to see the bookmarks associated with notes that he or she authored in the standard Bookmarks drop-down.



*iinsight* will gracefully handle bookmark deletion when notes are either deleted or their selection state modified. When a note is deleted/modified by the note author, the bookmark

---

will be deleted immediately. When a user with Admin permissions deletes/modifies a note, the bookmark will be deleted automatically the next time that the note author logs into the application.

## Manual Bookmark Creation

If a note's selection state changes in any way (see [Modifying Existing Note Selections](#) section, below) or is affected by Exclude Fields (see [Exclude Fields](#) section, above), a bookmark will not be associated with the note automatically. Rather, the bookmark would need to be manually created by either the note author or a user with Admin permissions.




Once a user's current selection state matches the note's selection state (without any Exclude Fields), the Add Bookmark icon (★+) will appear next to this note in place of the standard Restore Bookmark icon (★). Once a user is satisfied with the current layout view and wishes to attach it to a note that currently has no bookmark, he or she can press the ★+ icon. A new bookmark will be immediately created and attached to the note, and the ★+ icon will be replaced by the standard ★ icon.

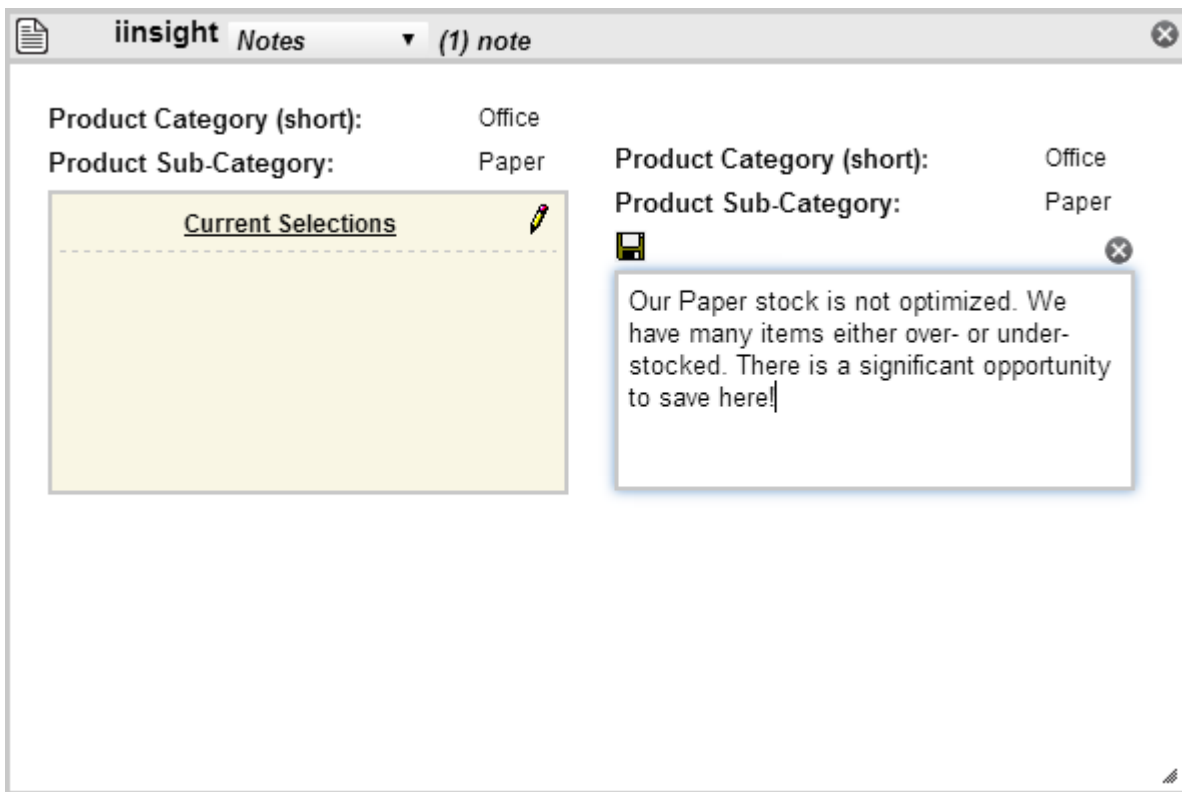
---

## Modifying Notes


All modifications to existing notes can be performed only by (a) the original note author, or (b) a user with Admin permissions.

## Editing Notes

To edit the text of an existing note, click the  icon next to the note. Type a note and, when you are ready to save it, click the  icon. To discard changes, press the  icon.



## Deleting Notes

To delete a note, click the  icon next to the note. When prompted for confirmation, click **OK** to delete the note.

---

## Modifying Existing Note Selections

Users can also edit the field values of their notes' selection states. For instance, if a note is associated with the year 2013, the author (or an Admin) can subsequently associate it with 2012, or with 2012 and 2013, or remove the field "Year" from the note's selection state entirely.

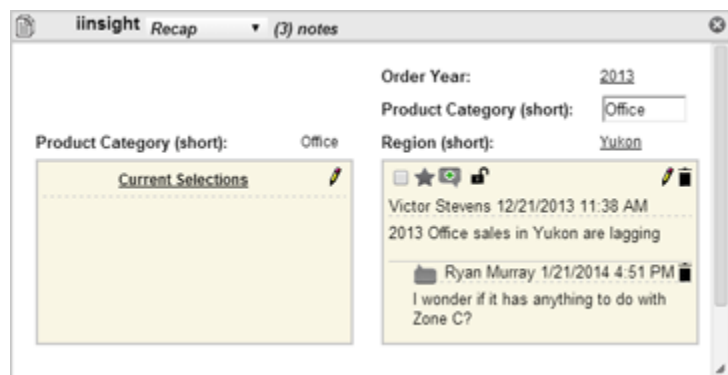
### Limitations

- Users can edit field values for fields that are already part of a note's selection state and can disassociate fields from notes entirely. Users cannot currently add a new field to a note's association, however.
- A user cannot edit/delete field values for notes that are associated with the user's current selection state.

*Note:* Changing a note's selection state in any way will result in the note's bookmark being deleted. Users will then need to manually redefine the bookmark. See the [Manual Bookmark Creation](#) section, above.

### Changing Field Associations


**Step 1:** Click the underlined field values for the field that you wish to change. This will display a text box of comma-delimited field values.

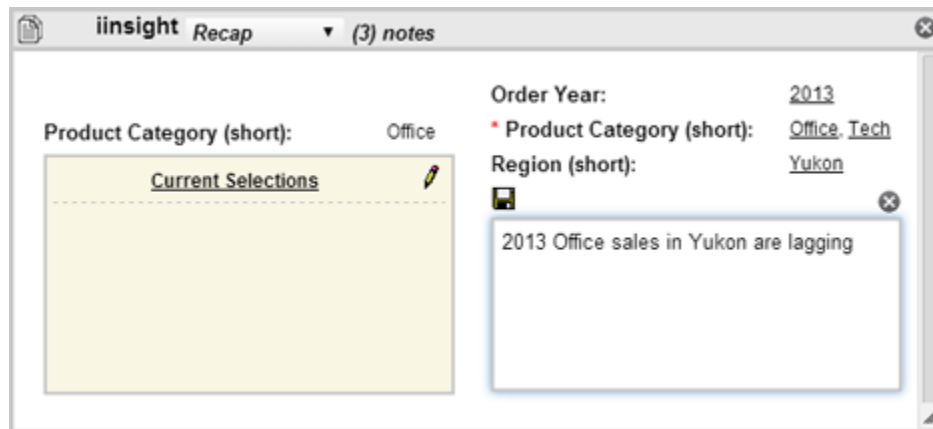


**Step 2:** In this text box, change the field values of the field to any combination of field values that you wish. Field values should be comma-delimited. When the changes for the current field are complete, press **Enter**.

Order Year: 2013  
Product Category (short): Office, Tech  
Region (short): Yukon

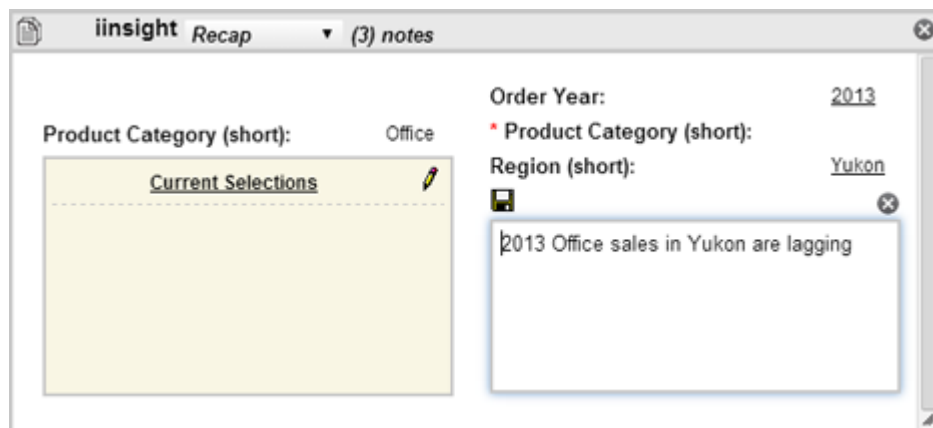
**Step 3:** Repeat Steps 1 and 2 for any other fields on the same note that you wish to change.

**Step 4:** When all desired changes are complete, press the  icon to finalize the changes.



### Deleting Fields Entirely

If you wish to disassociate a note from a field entirely, follow the procedure outlined above and, in Step 2, delete all text from the field value text box.



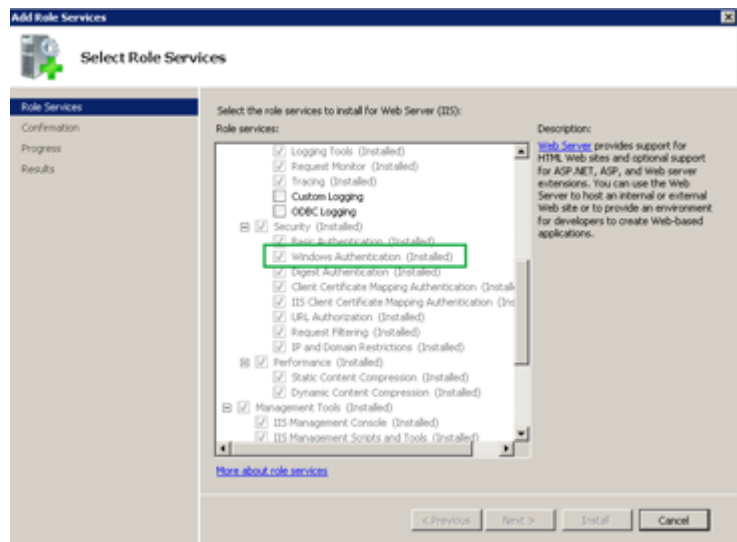


# Security

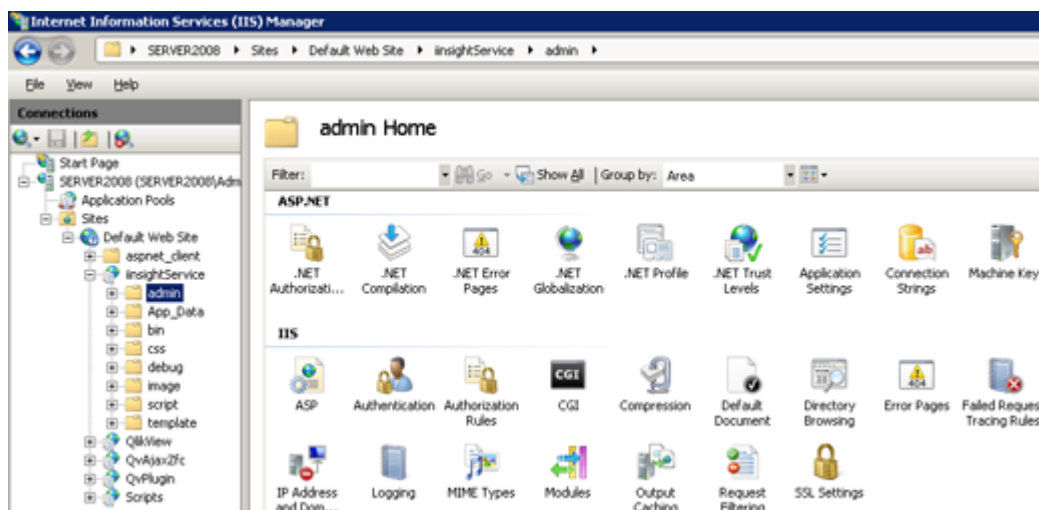
## Securing the Management Console

By default, all users in the *iinsight* server's domain will be able to access the *iinsight* Management Console. To modify this default behavior and allow access to only certain users/groups, IIS security must be configured. This section will guide you through securing the Management Console. This guide will assume an environment that uses default Windows authentication; web form authentication is also possible, but is outside the scope of this guide.

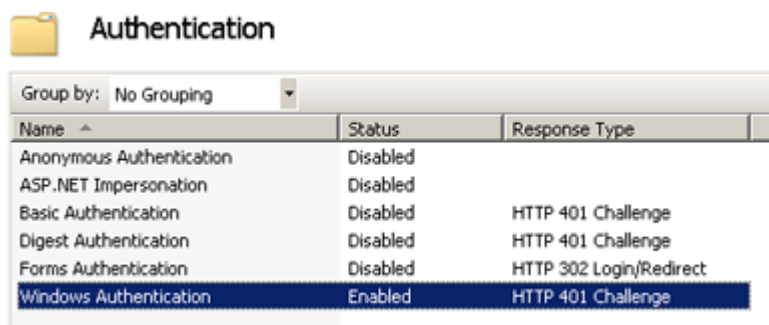
**Step 1:** Ensure that Windows Authentication has been installed in IIS.



**Step 2:** In IIS Manager, expand /iinsightService and left-click the **admin** directory.



**Step 3:** Double-click **Authentication** in the right panel and ensure that Anonymous Authentication is disabled and Windows Authentication is enabled.



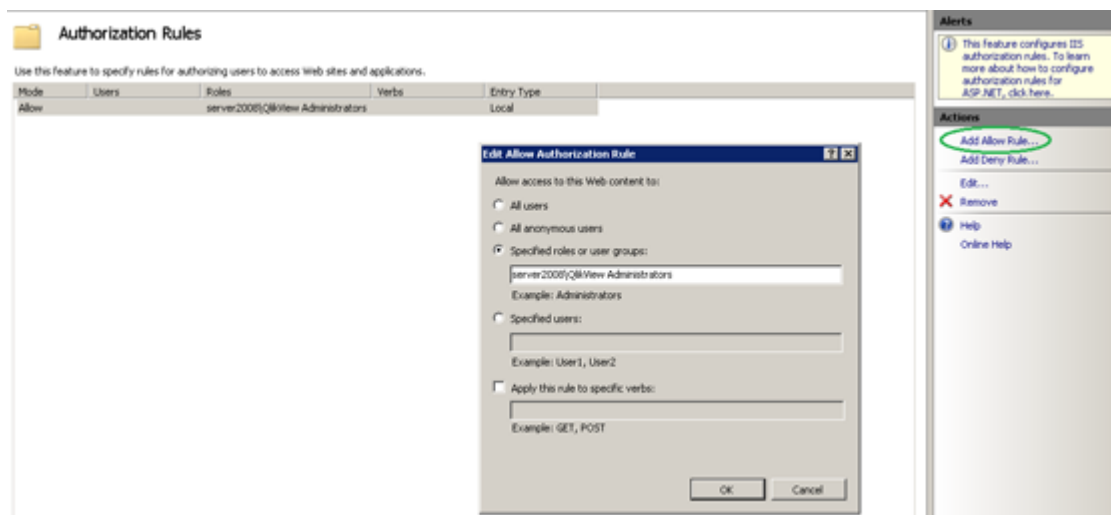
**Step 4:** Double-click **Authorization Rules** in the right panel, and delete the **All Users** entry.



**Step 5:** In the right panel, select **Add Allow Rule**.

**Step 5a:** To grant access to a group of users, select **Specified roles or user groups** and enter a group name in the format *domain\groupname* (for example, server2008\QlikView Administrators).

**Step 5b:** To grant access to a list of individual users, select **Specified users** and enter individual usernames in *domain\username* format, separated by commas (for example, corpdomain\admin1, corpdomain\admin2).



---

## Step 6: Restart the IIS Server.

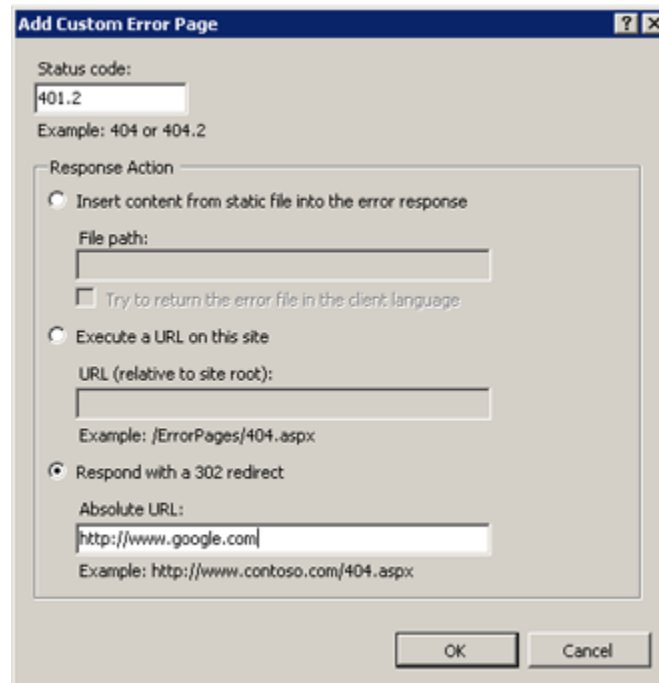


**Step 7:** Optionally, you may wish to set up a custom error page for unauthorized users, to replace the default IIS webpage, or to redirect unauthorized users to a different URL.

**Step 7a:** Expand /iinsightService and left-click the **admin** directory. Double-click **Error Pages** in the right panel.

**Step 7b:** In the right panel, click **Add**. Enter **401.2** as a status code.

**Step 7c:** Select the appropriate action that you want to take for unauthorized users. For more details on each action, see [http://technet.microsoft.com/en-us/library/cc753103\(v=ws.10\).aspx](http://technet.microsoft.com/en-us/library/cc753103(v=ws.10).aspx).





For more information on IIS authentication and authorization, see <http://www.iis.net/learn/manage/configuring-security/understanding-iis-url-authorization>.

---

## Note Security

Notes in *iinsight* can be secured so that they are only visible to certain users or groups.

### Adding/Modifying Security

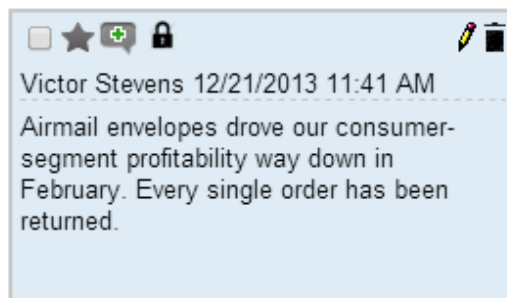
To add/modify security on an existing note, first click the  icon next to the note (if adding security to a previously unsecured note) or  (if modifying security on a previously secured note). These icons will only be visible to the note author and to users with Admin permissions.

In the security interface, choose **Select Users** or **Select Groups** to grant permission to certain users and groups, respectively. Any combination of users and groups may be added to the note security permissions.

*Note:* There is no need to add the note author, as he or she will be added automatically and cannot be removed from note security. There is also no need to add any users with Admin permissions, as they will be able to see all notes regardless of security.


When the appropriate security permissions have been configured, press **Apply Selected** to apply the security. On a previously unsecured note, the background of the note will now turn blue to indicate that the note has security applied.

Customer Segment: Consumer  
Order Month: Feb  
Order Year: 2013  
Product Category (short): Office  
Product Name: Airmail Envelopes  
Product Sub-Category: Envelopes  
Region (short): Yukon






---

### Removing Security

To remove security and make the note visible to all users, click the  icon, select **Anyone**, and press **Apply Selected**. The background of the note will now turn beige to indicate that the note does not have security applied.

Customer Segment:	<u>Consumer</u>
Order Month:	<u>Feb</u>
Order Year:	<u>2013</u>
Product Category (short):	<u>Office</u>
Product Name:	<u>Airmail Envelopes</u>
Product Sub-Category:	<u>Envelopes</u>
Region (short):	<u>Yukon</u>

☐   

Victor Stevens 12/21/2013 11:41 AM

Airmail envelopes drove our consumer-segment profitability way down in February. Every single order has been returned.

### Limitations

**iinsight** does not respect Section Access reductions or omissions. For example, if a user has access via Section Access to view a particular Region and creates a note associated with that Region, all users will by default be able to view that note (in Recap/Search/Notifications). **iinsight** security has been designed with this limitation in mind—a user in this situation should be trained to grant access to sensitive notes to only those users who also have permission to view that Region. Users should coordinate with **iinsight** Administrators to create predefined user groups to ease distribution.

**iinsight** bookmarks will never display any forbidden data to users, however. In the example above, if a user who does not have access to that Region clicks on the bookmark associated with the note, QlikView will not display the forbidden Region to him or her.

---

# Troubleshooting

The following is a non-exclusive list of the most common issues that you may experience with iinsight, along with the resolution to each issue. For additional support for issues not on this list, please email [solutions@infinityinsight.com](mailto:solutions@infinityinsight.com).

**Issue:** The installer presents the following error message: “The installer was interrupted before iinsight for QlikView could be installed. You need to restart the installer to try again.”

**Resolution:** Ensure that **IIS 6 Management Compatibility** and all sub-services are enabled under Server Manager >> Roles >> Web Server (IIS) >> Add Role Services >> Management Tools. Once it has been enabled, restart the installation.

**Issue:** Saving a new license under the License Request tab of the Management Console has no effect (the license is not applied).

**Resolution:** Assuming you are entering a valid license key, this issue typically occurs if the *iinsight* virtual application’s IIS Application Pool is running under an identity that is not a member of the Administrators group on the local machine. To change the identity of the IIS Application Pool, follow the instructions in this article and, in Step 6, specify a username that is a member of the local Administrators group: [http://technet.microsoft.com/en-us/library/cc771170\(v=ws.10\).aspx](http://technet.microsoft.com/en-us/library/cc771170(v=ws.10).aspx). Alternatively, you can simply change the *iinsight* virtual application’s IIS Application Pool if an appropriate application pool already exists (for example, **QlikView IIS**). The procedure for doing so is outlined in the following article: [http://technet.microsoft.com/en-us/library/cc731755\(v=ws.10\).aspx](http://technet.microsoft.com/en-us/library/cc731755(v=ws.10).aspx).

**Issue:** The *iinsight* icons do not appear in your QlikView™ application.

**Resolution 1:** See the [Adding iinsight to QlikView Applications](#) section, above—unless your QlikView™ application is configured to always start on one particular sheet, the *iinsight* extension must be added to every sheet in the application.

**Resolution 2:** See the [License Overview](#) section, above—*iinsight* will only display icons to users that have a license. Ensure that you have a sufficient number of licenses to support all your users, and that licenses are either assigned dynamically or you have correctly assigned them to users manually. To expand your current licenses, please contact [solutions@infinityinsight.com](mailto:solutions@infinityinsight.com).