



Reference Manual

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Authored by QlikTech International AB JJN*

QlikView Publisher 8 Reference Manual

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1 Before You Begin

Welcome to QlikView – the data access solution that enables you to analyze and use information from different data sources.

QlikView Publisher is a member of the QlikView product family that manages content and access. By presenting your end-users with up-to-date information, and letting you manage your QlikView documents in a powerful way, QlikView Publisher is a valuable addition to the QlikView suite.

QlikView Publisher distributes data stored in QlikView documents to users within and outside the organization. By reducing documents, each user can be presented with the information that concerns him/her. Documents are kept updated on a job basis, ensuring an up-to-date content.

1.1 QlikTech Support Services

Contact us if you need product support, additional training or consultation concerning QlikTech products. It is possible to use the following e-mail addresses for questions concerning:

Sales	sales@qliktech.com
Bug reporting	support@qliktech.com
Support	support@qliktech.com

1.2 www Home Page

You will find us on the World Wide Web as <http://www.qliktech.com>

1.3 QlikTech Head Office

QlikTech International	Phone +46 (46) 286 27 00
Science Park Ideon	Fax +46 (46) 286 26 61
S-222 23 Lund	E-mail info@qliktech.com
Sweden	

For other QlikTech offices, please visit our home page, www.qliktech.com.

1.4 Conventions

1.4.1 General Conventions

- Numbered lists (e.g. 1, 2, 3, ...) indicate procedures with two or more sequential steps.

- Bulleted lists, such as this one, provide information, and do not indicate procedural steps.
- The word “administrator” is used to describe the person using QlikView Publisher to create and administrate QlikView documents.
- The word “end-user” is used to describe a person who accesses QlikView documents created in QlikView Publisher through the distribution file tree or through QlikView AccessPoint.

1.5 About this manual

This reference manual is made up of 3 sections

- 1 QlikView Publisher Setup
- 2 Detailed technical view of QlikView Publisher 8
- 3 Support tools

2 QlikView Publisher Setup

The setup is made up of 5 steps.

- 1 Prerequisites
- 2 Database requirements and recommendations
- 3 Running the installer program
- 4 Post installation settings
- 5 Setting up you primary resources inside Publisher

2.1 Prerequisites

Before you install QlikView Publisher please make sure that you have the following installed:

- .NET Framework 2.0 (on all machines that will run QlikView Publisher Components)
- IIS (on the machine that will run the Control Panel).

2.2 Database requirements and recommendations

The database in QlikView Publisher can be either an MS SQL server or an XML repository that requires no preinstalled software.

The supported versions of MS SQL Server are SQL Server 2000 and 2005.

If you have a MS SQL Server already set up we recommend that you use that. The XML repository is sufficient for most installations when it comes to performance.

If you do not have a MS SQL Server available we recommend that you start with an XML repository installation and if the performance is not sufficient then upgrade to MS SQL Server. You can migrate all data currently in the database between an XML repository and a SQL Server.

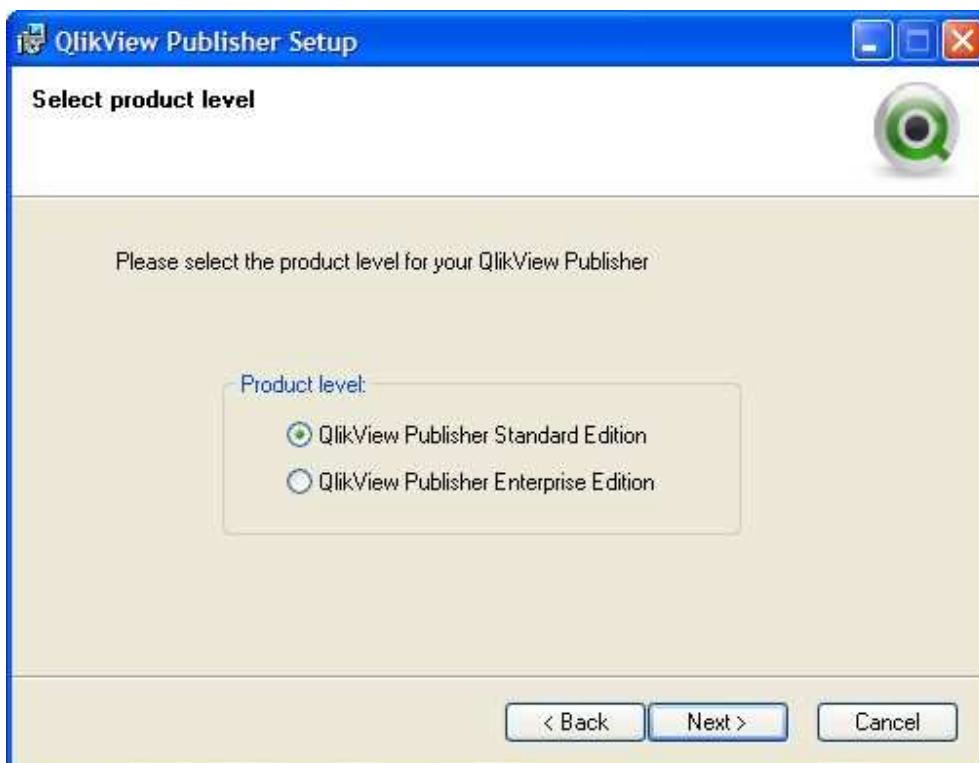
NOTE: Please note that the XML repository does not include any functions for backing up data. This means that backup needs to be arranged manually. Best practice for this is to stop the Command Center Service, back up the files and then start the service again.

2.3 Installation

For a 32-bit installation, run QvPublisherSetupRedist.exe. For the 64 bit version run QvPublisherX64SetupRedist.exe. The setup file will extract its content and install from these files. Both QlikView Publisher Standard edition and Enterprise edition follow the same setup process. Where there are any differences they are mentioned in this manual.

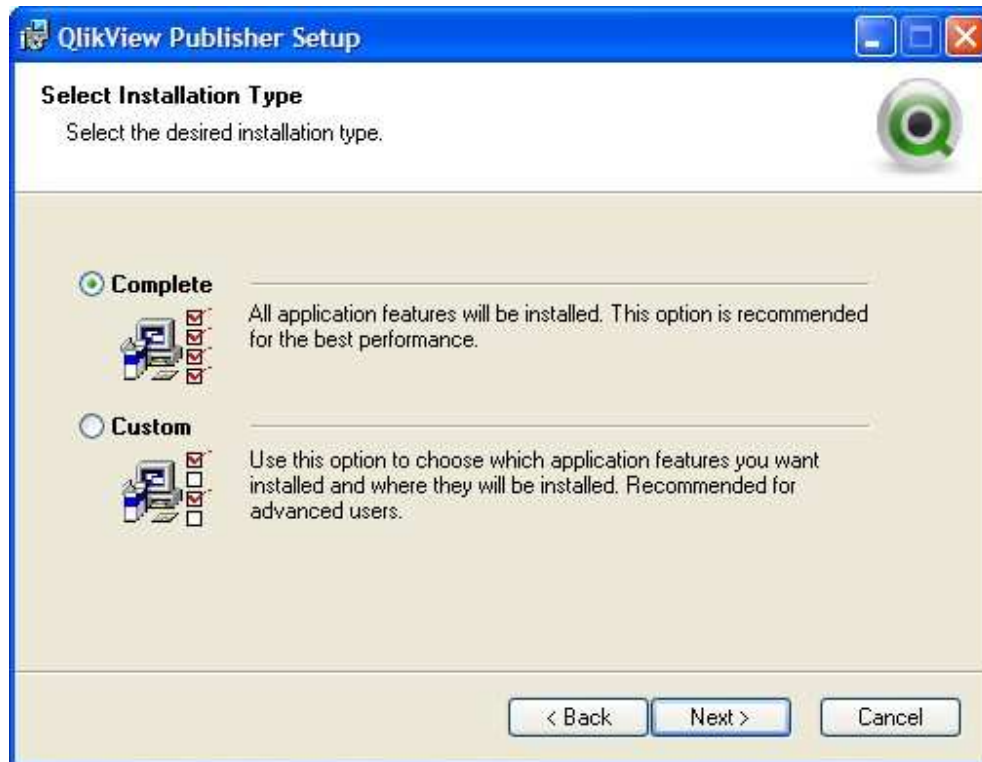
2.3.1 Select Installation Type

When you start the installer you select which region you are located in and whom the product shall be licensed to. Then you decide which edition you want to install.



If you want to run a Standard Edition then all services will be run as Local System, if you select Enterprise edition you will be asked for the Windows Account that will be used to run the Execution Service and the Directory Service Controller.

Install the complete product or select the components you want to install using the **Select Installation Type** dialog in the setup program.

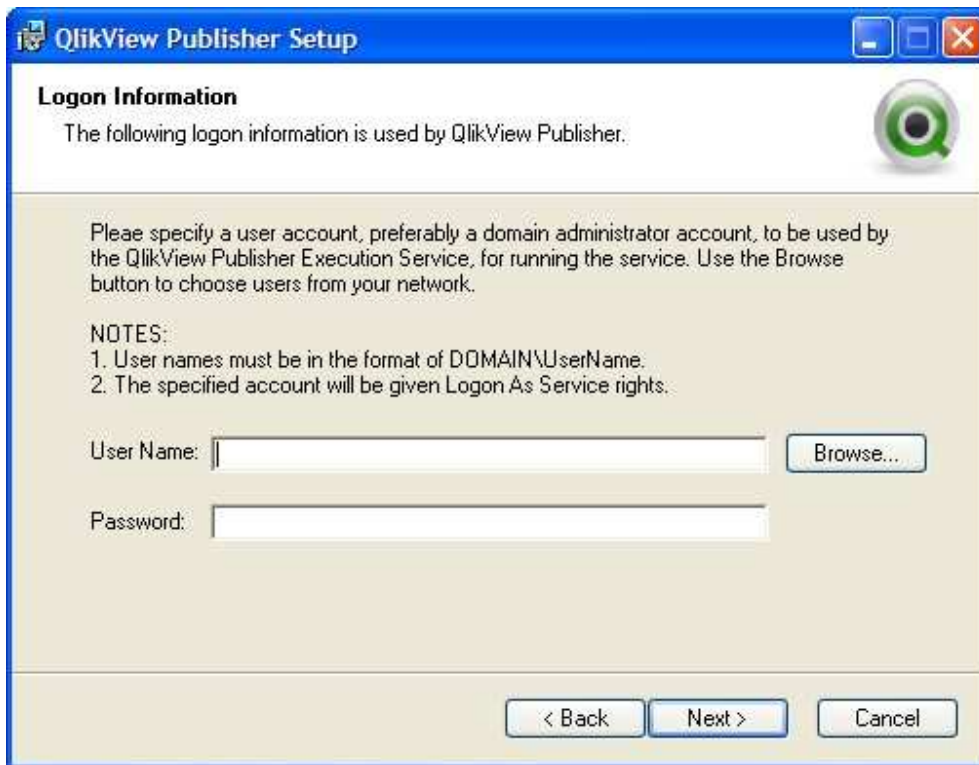


If you are setting up a distributed environment with *Execution services* on different machines select Custom Installation and select only the components needed on this machine. For example on one server you do a complete installation, on another server you install only an *Execution Service*.

2.3.2 Logon Information

If you previously selected Standard edition the installation program will not show this step.

Specify the account that the ExecutionService and Directory Service Controller will run under.



Please note that the account must be specified in the DOMAINACCOUNT format. The account you specify will be given Logon As Service rights.

3 Post Installation Settings

Running QlikView Publisher 8 on a Windows 2000 machine

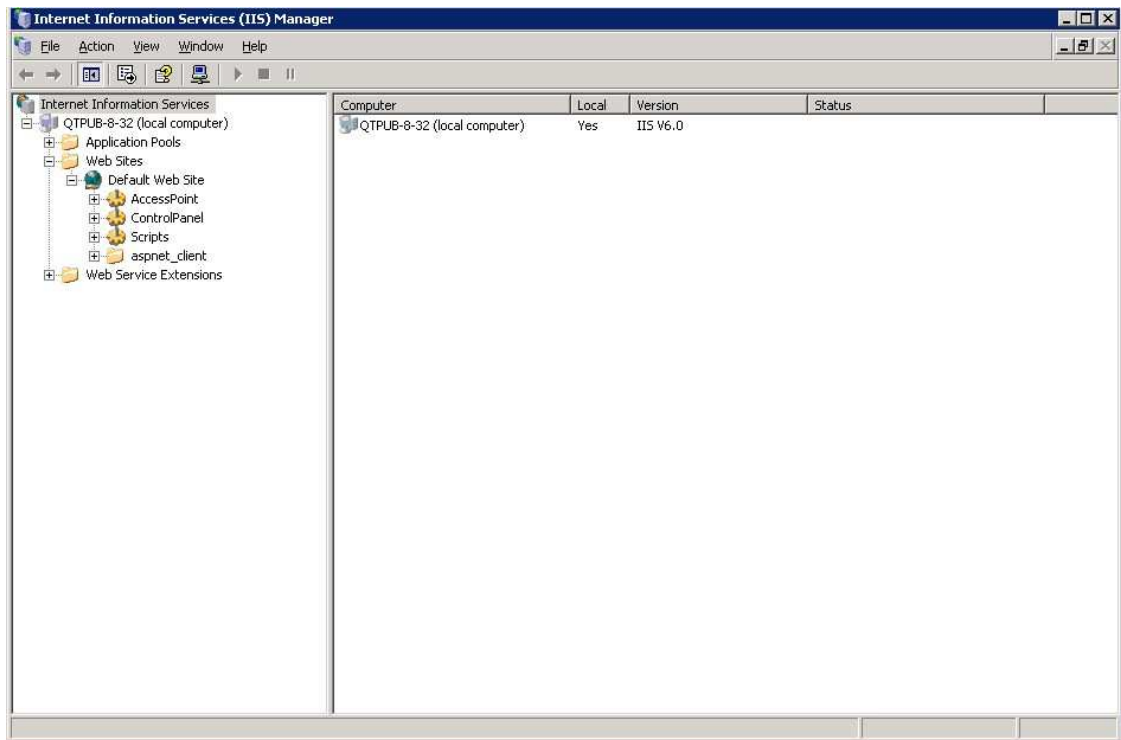
If you are running QlikView Publisher on a Windows 2000 machine you need to manually grant access to the IIS in the folder C:\Documents and Settings\All Users\Application Data\QlikTech\Publisher. Grant Modify rights to the account Network Service if you are using IIS 5.1 or later, if you are using IIS 5.0 grant the account ASPNET the same rights. Windows XP and 2003 server both have this setting automatically.

3.1 IIS Configuration

3.1.1 ControlPanel configuration

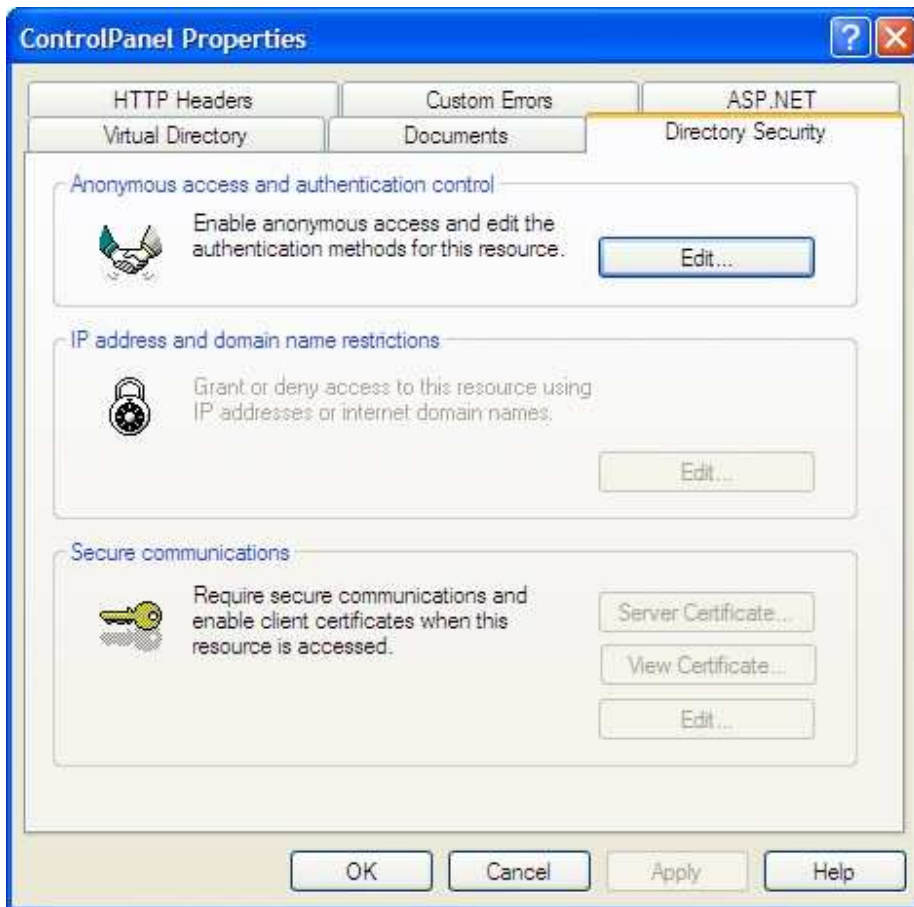
Please make sure that the folder ControlPanel has Integrated Windows authentication turned on and Anonymous access turned off.

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The image above shows an IIS 6 with QlikView Publisher 8 installed.

To check and change the permissions on Control Panel folder, locate the ControlPanel virtual directory and right-click it to view the permissions. The permissions dialog contains five tabs.



Open the **Directory Security** dialog and click the **Edit** button in the **Anonymous access and authentication** control group box. This will open the dialog below.



Uncheck the **Anonymous access** check box and make sure that the **Integrated Windows authentication** box is checked.

3.1.2 AccessPoint configuration

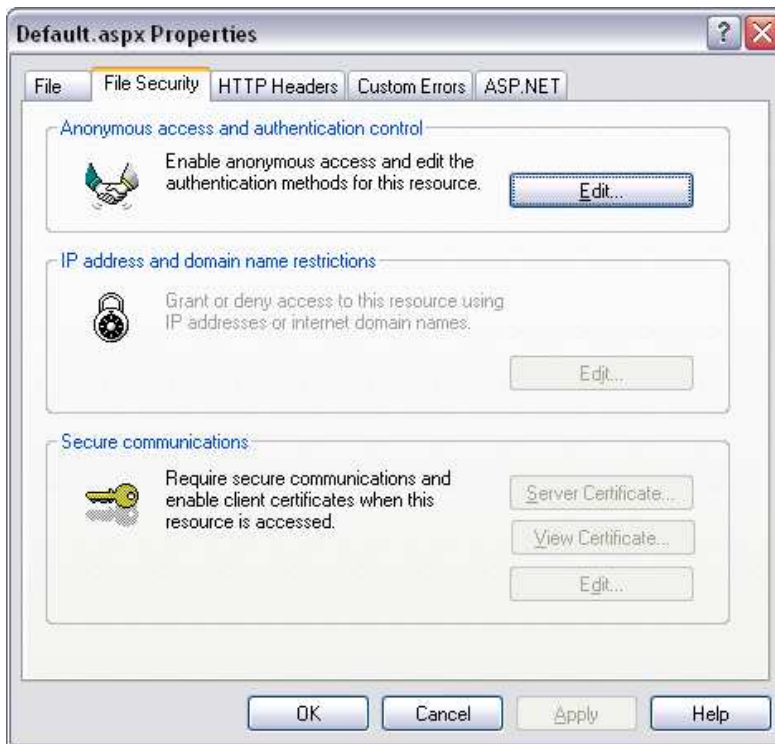
For *System users*

Make sure that the **AccessPoint** virtual directory has **Integrated Windows authentication** turned on and **Anonymous access** turned off.

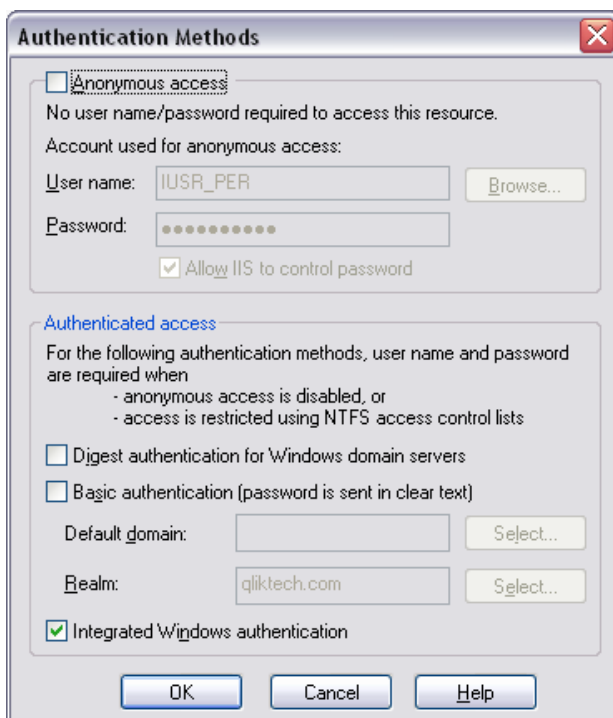
For *Custom users*

Make sure that the **AccessPoint** virtual directory has **Integrated Windows authentication** turned on and **Anonymous access** turned on.

Please note that the AccessPoint service (AccessPointService.exe) is not started automatically and must be started manually before it can be used.



Go to the **File Security** dialog and click the **Edit** button in the **Anonymous access and authentication** control group box. This will open the dialog shown below.



Uncheck the **Anonymous access** check box and make sure that the **Integrated Windows authentication** box is checked.

3.2 ExecutionService (XS) Configuration

Please make sure that the account running the XS is granted modify access to the folders that this instance of QlikView Publisher 8 may require. If you intend to access folders on the local computer, a local administrator account is sufficient.

NOTE: If you intend to run the *QlikView Publisher Enterprise edition*, the account that is used for running the XS also requires permissions to read from the directory service.

NOTE: The XS Service is not started automatically and must be started manually.

3.3 Directory Service Controller Configuration (DSC)

In version 8.0 you need to install a DSC on the same machine as each XS.

NOTE: If you intend to run the *QlikView Publisher Enterprise edition*, please note that the account that is used for running the DSC also requires permissions to read from the directory service.

NOTE: The DSC Service is not started automatically and must be started manually.

3.4 Initial set up inside Publisher

As the user logs in, *User Profiles* are applied. Based on that settings and resources are made shown. The user must select an *XS* or, if no registered *XS*' exists, register a new *XS*.

When this is done, a connection to a *QVPR* will be established. This is done through the *Command Center*.

In order to perform any of the tasks within QlikView Publisher, resources must be registered. The resources are tied to an *XS* and only available from the *XS* they belong to.

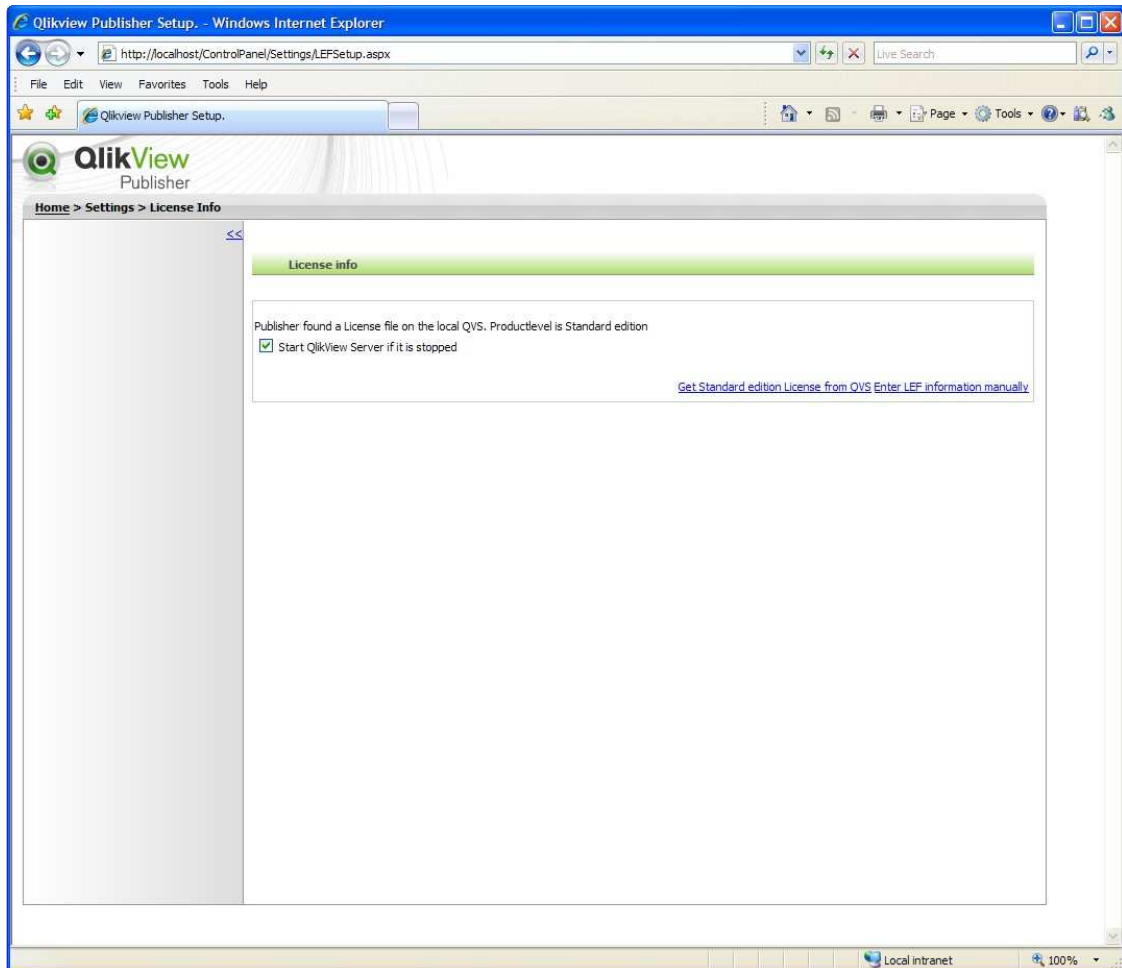
To start setting up Publisher go to the URL
<http://<MachineName>/controlpanel/default.aspx>

3.4.1 Apply License

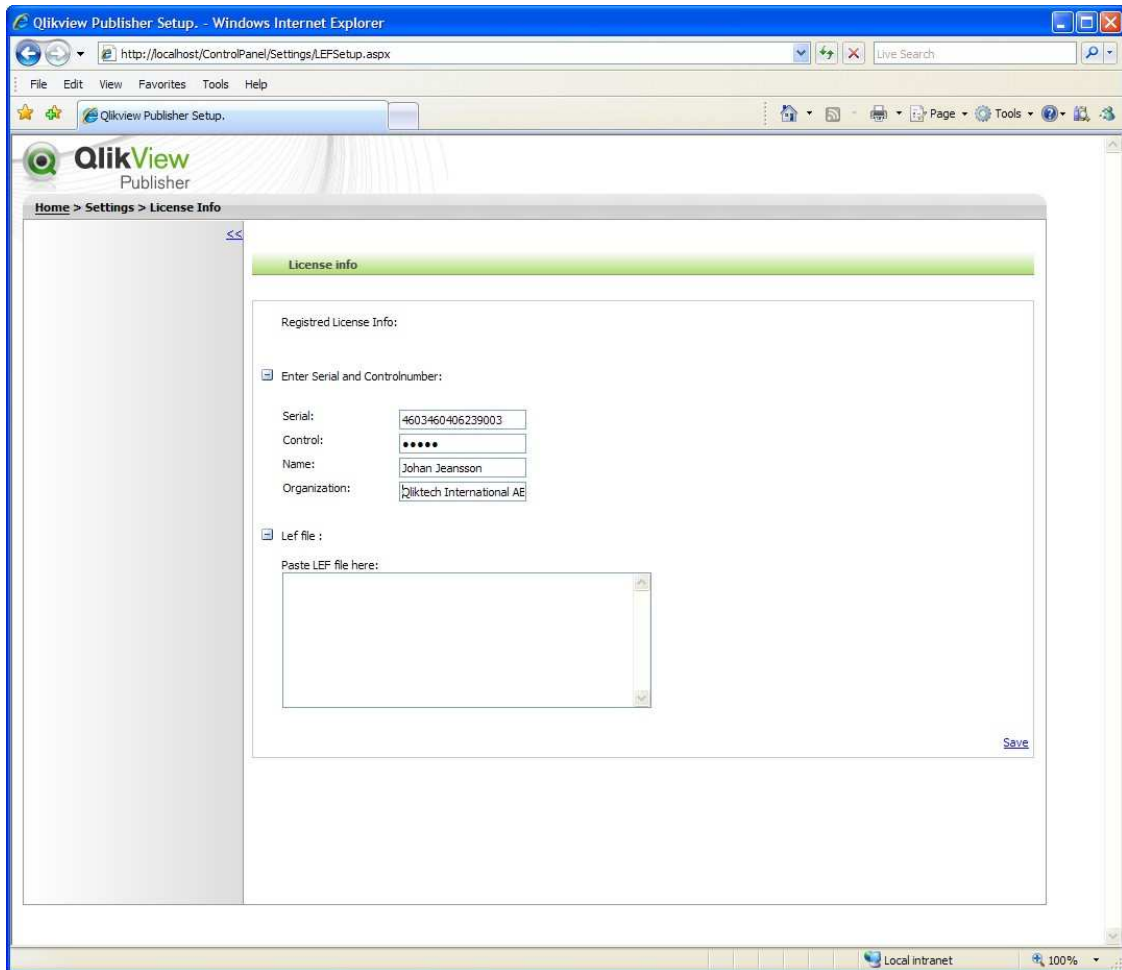
The first time you connect to QlikView Publisher 8 you have to enter your License. An automatic call is made to see if there is a QVS version 8 available on the machine. If there is, you will see the LEF for that and be asked if you want to use that license to

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make your installation a Standard Edition. If you want to apply an *Enterprise Edition* License then go click the link "**Enter LEF information manually**", and enter your serial and control number.

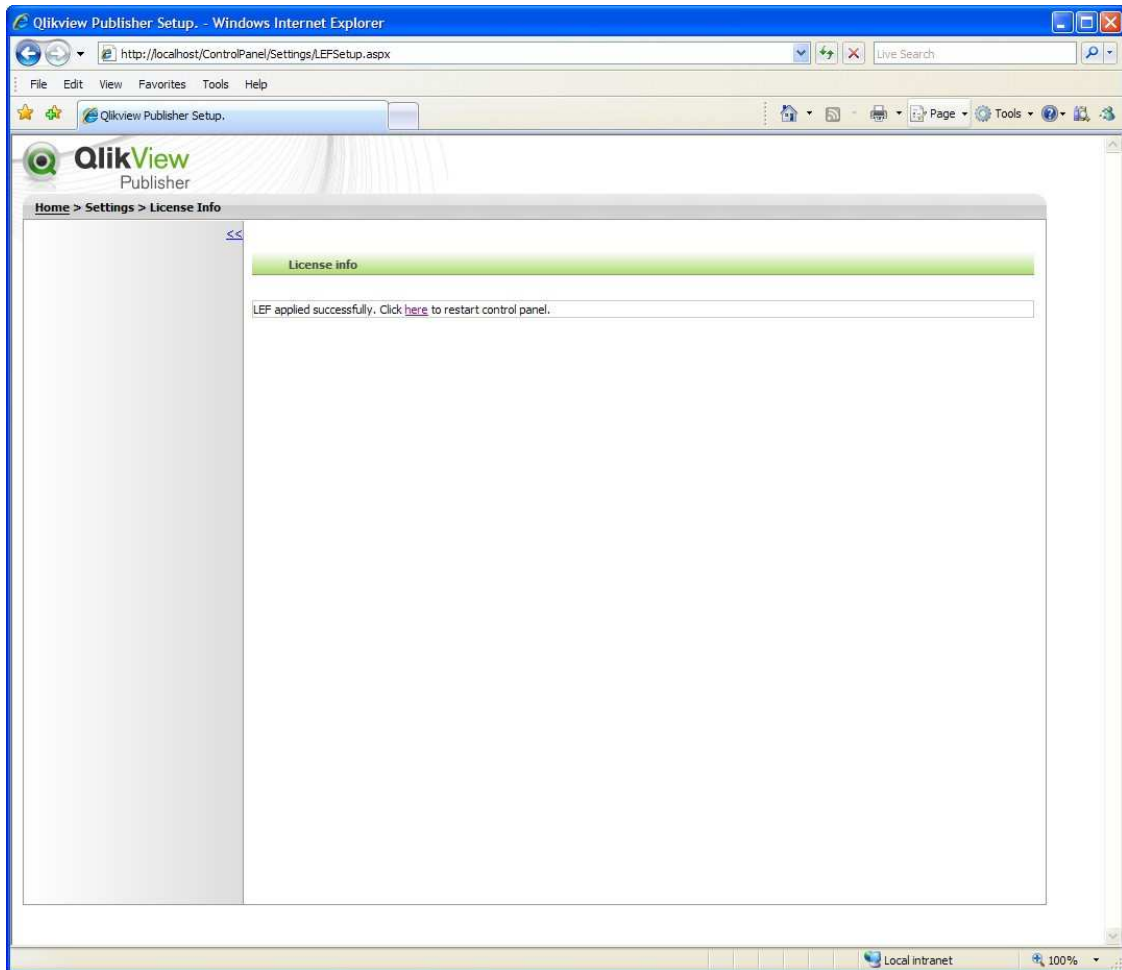


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Publisher will then try to contact the **License server** and verify the information. If your computer does not have internet connection you can enter the LEF file manually, for more information on this please refer to section 4.10.5.1. After the information has been validated you see the following:

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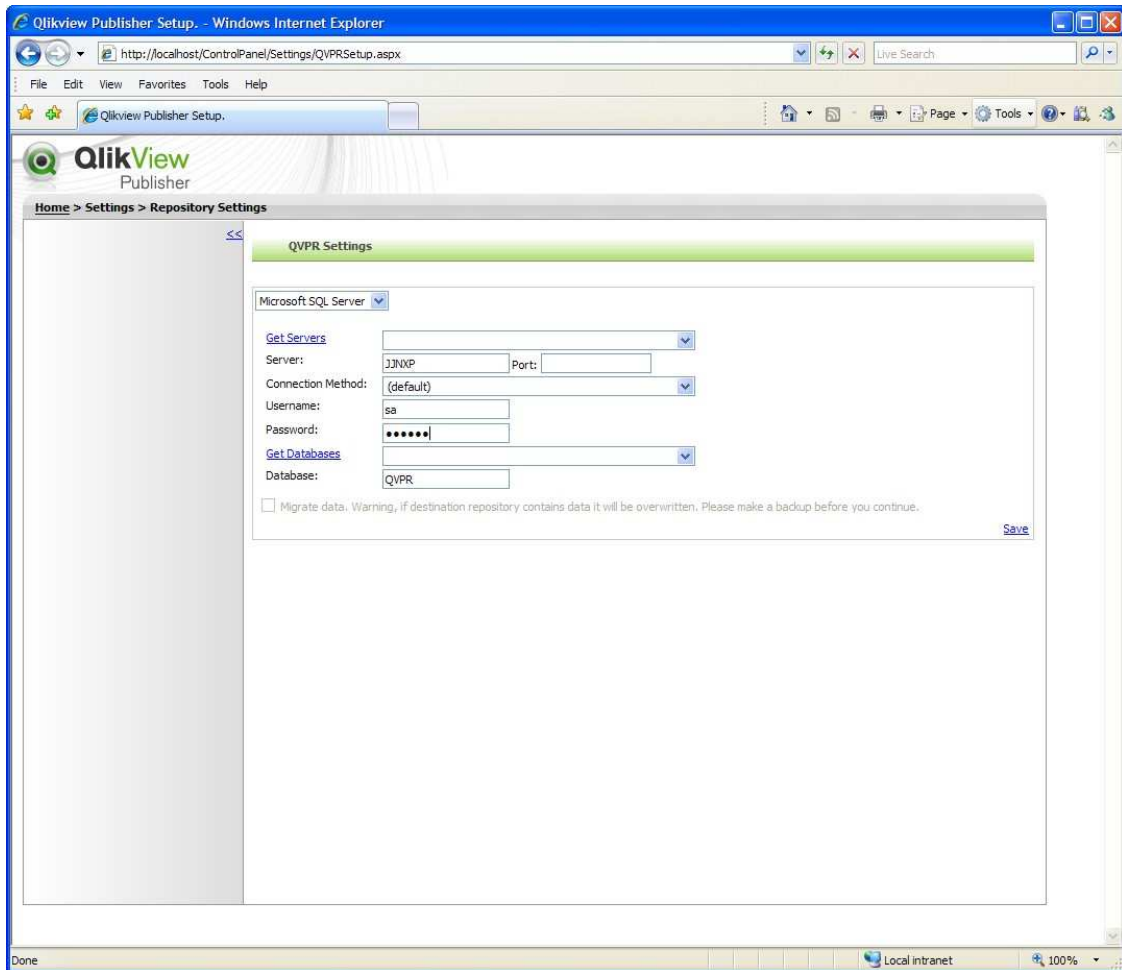


3.4.2 Create and connect to the QlikView Publisher Repository meta database

The QVPR is set up when QlikView Publisher is started for the first time. The connection to QVPR is managed through **Repository Settings** located under the **Settings** menu.

QlikView Publisher can use an *XML Repository* or a SQL Server based repository. The SQL server setup needs settings as seen in the picture below.

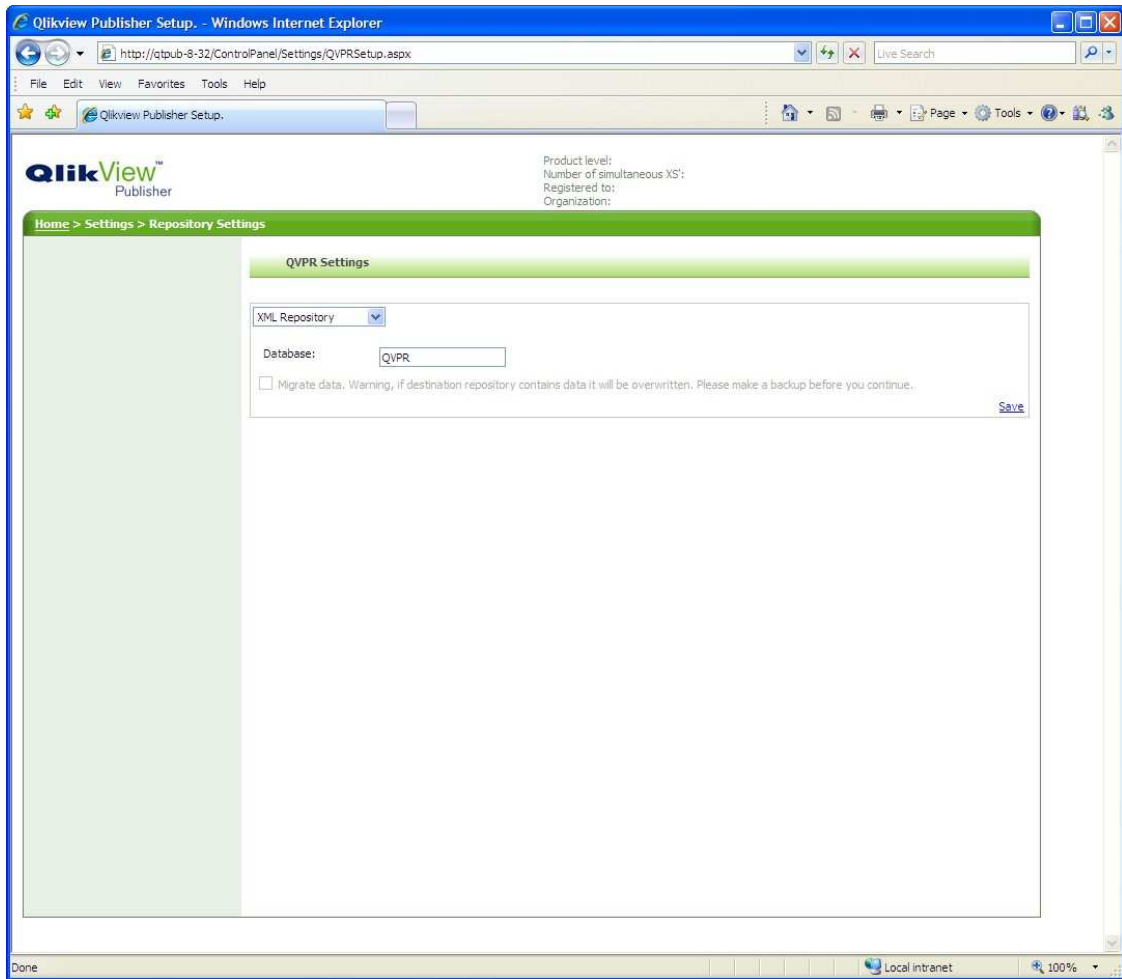
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Please note that the connection to QVPR should be done through an SQL Server account rather than through Windows authentication since the connection is actually done through the *Command Center*. The *Command Center* is normally run on an account with very limited permissions on the network.

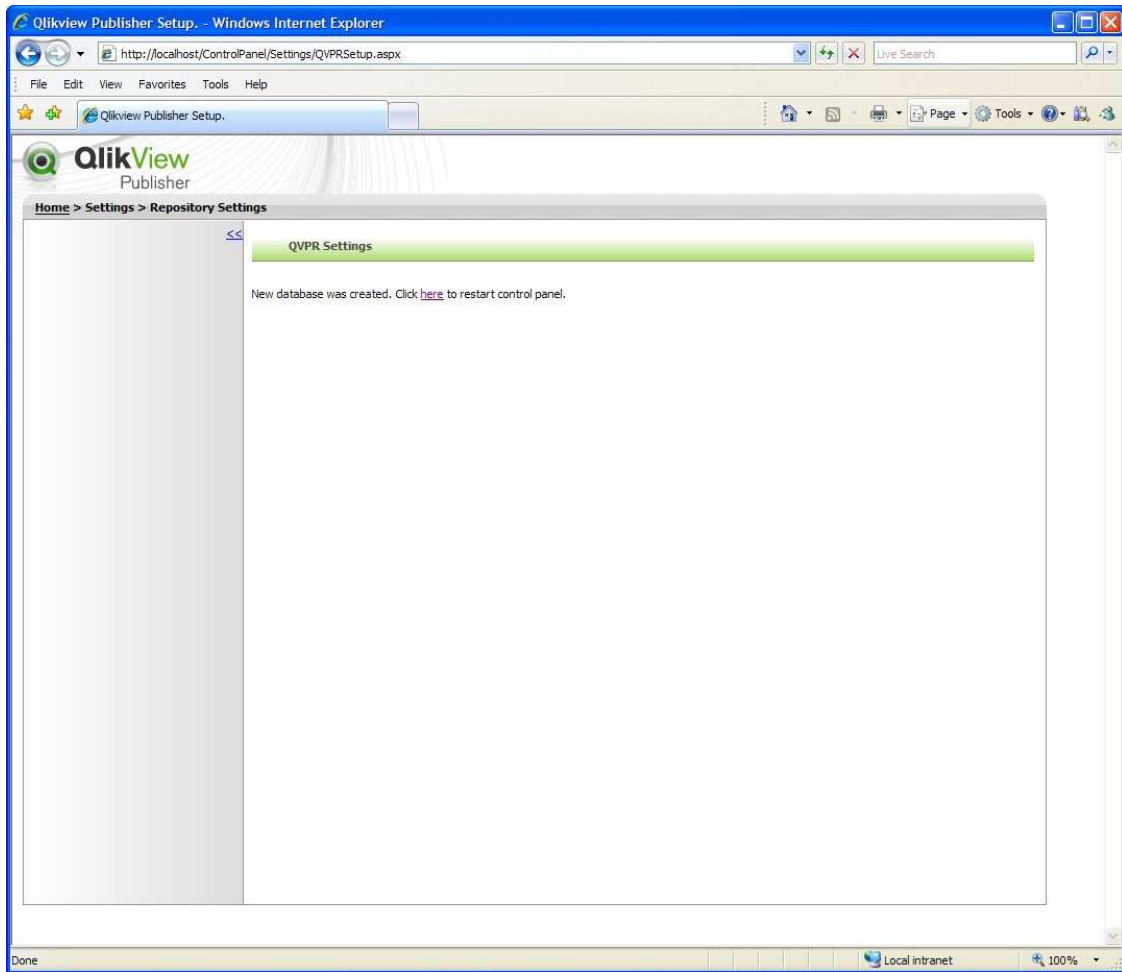
Give the XML repository an appropriate name.

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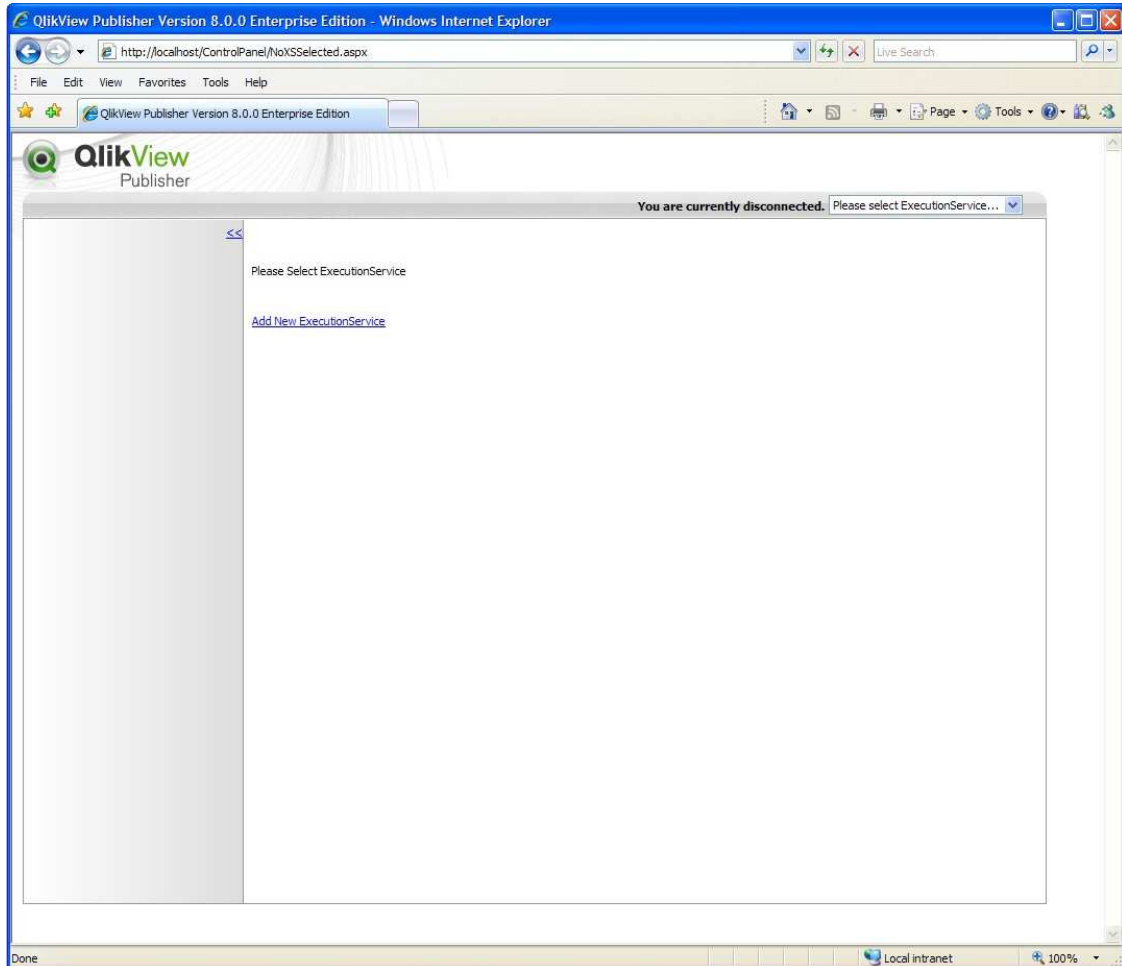
When you have created your QVPR you see the following:

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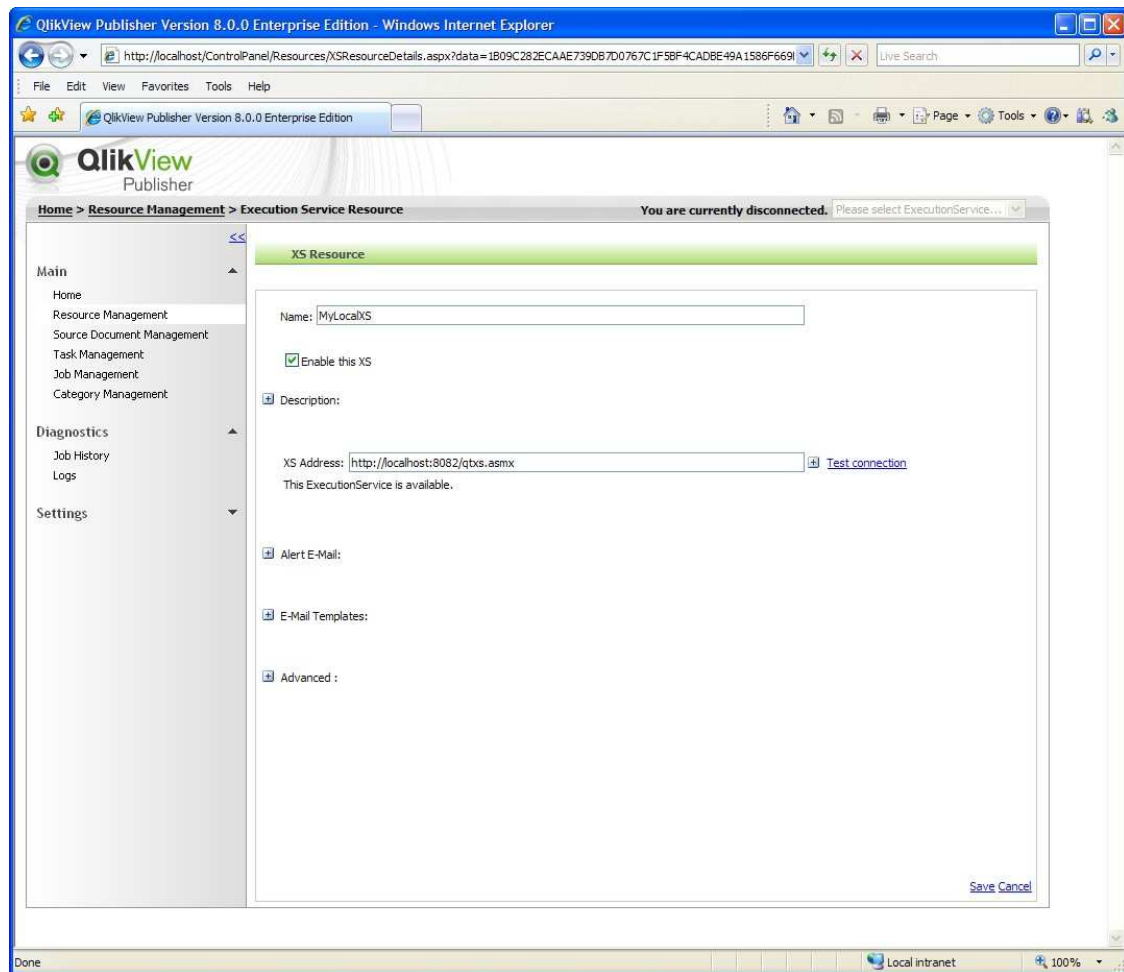
3.4.3 Register an Execution Service (XS)

The basic component in any QlikView Publisher 8 installation is the XS. The XS interacts with the resources and performs all operations on *QlikView* documents. Before you have registered any XS you see the following page:



Clicking the link **Add New ExecutionService** takes you to the setup page for the XS.

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Start by entering a name for your XS and make sure that **Enable this XS** is checked. Under **Description**, you can enter a descriptive text of the resource. The description will be shown in the resources overview list.

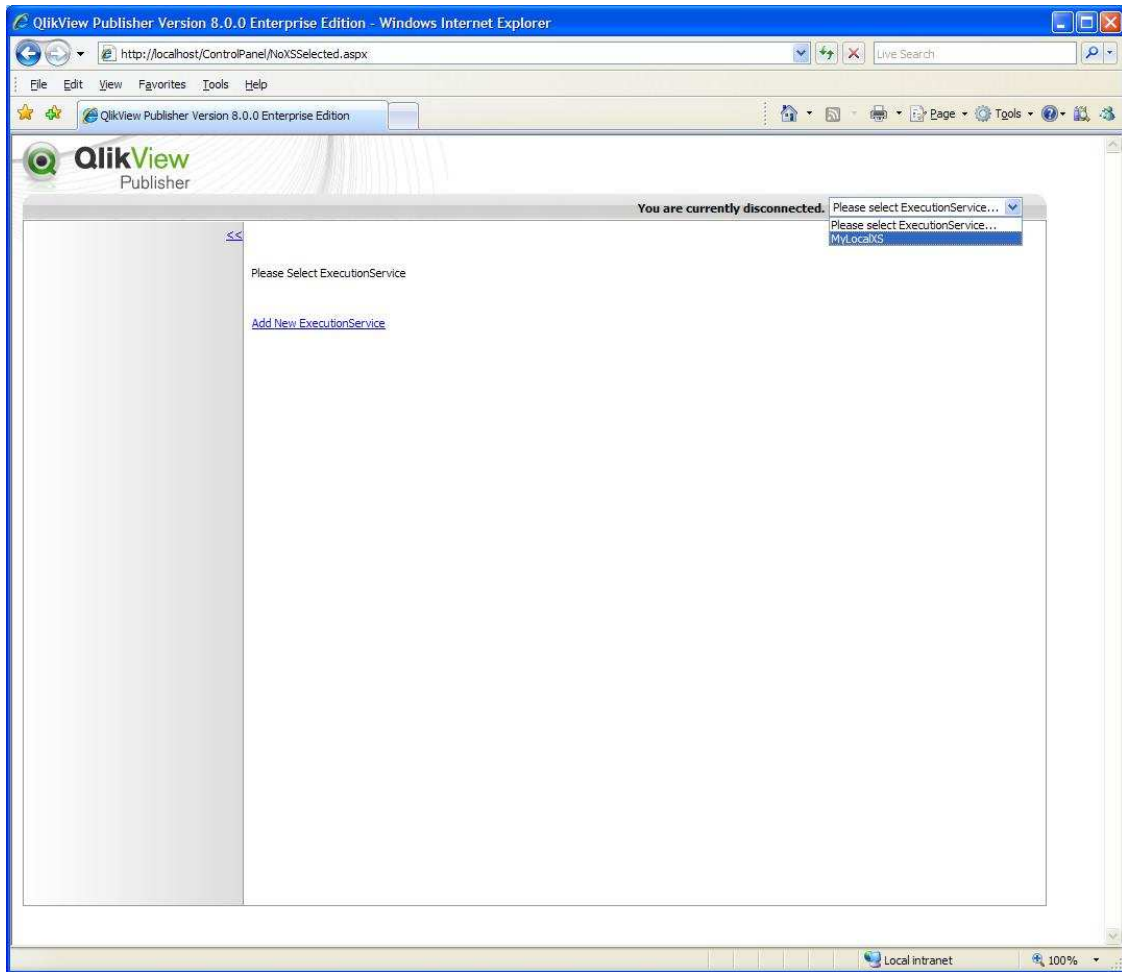
The **XS Address** field contains the path to the XS. By default, the XS communicates on port 8082. Click **Test Connection** to test the connection to the XS.

For information about what is found under the **Advanced** link please refer to the XS part of the Detailed Technical information part of this manual.

One of the new features of QlikView Publisher 8 is XS groups. Here you can register several different XSs that will share the workload between them. To create an XS group click the **+** sign to the right of the **XS Address Field**. To read more about this feature please refer to the XS part of the Detailed Technical information part of this manual.

When you have registered your XS you need to select it to connect to it. This is done in the upper right corner of the screen.

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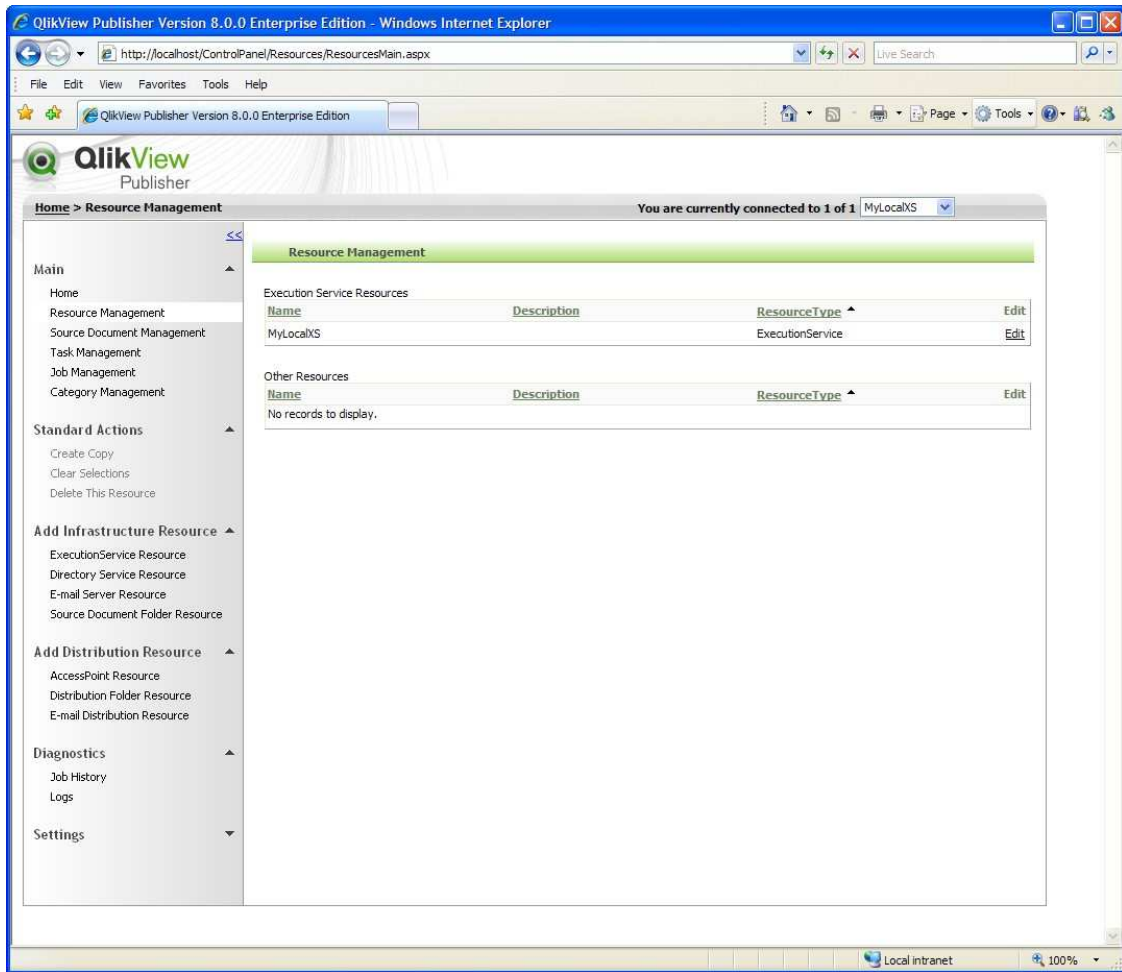


3.4.4 Register a Directory Service Resource

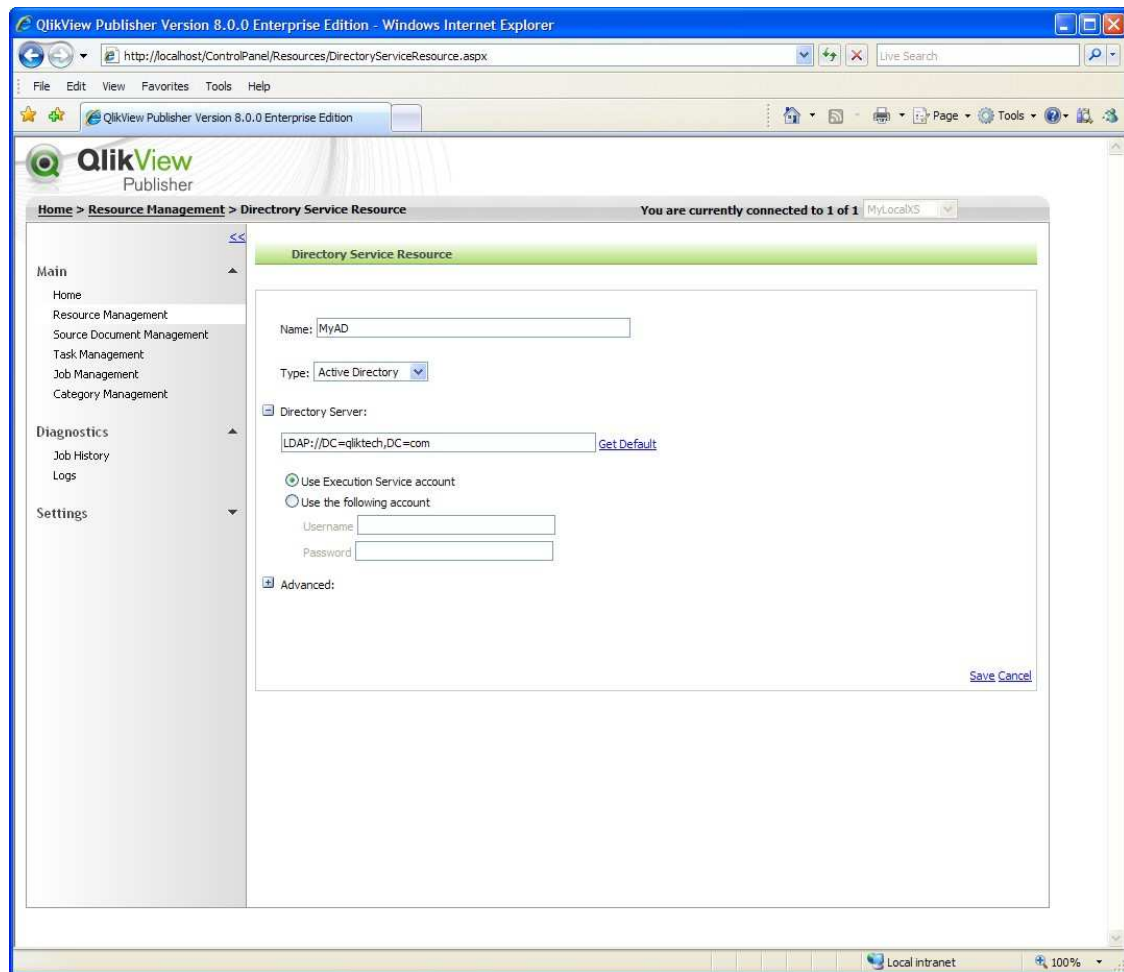
If you are installing a *Standard edition* you should skip this step.

In order to create and execute any *Tasks* within QlikView Publisher, a number of *Resources* must be registered. In order to register *User Profiles*, a *Directory Service Resource* is required. To register a *Directory Service Resource*, navigate to *Resource Management*, then click *Directory Service Resource* under *Add Infrastructure Resource*.

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Start by entering a name for your **Directory Service Resource**. By default the *Type* drop-down list contains four different options. These options define the type of **Directory Service Resource** you are about to add. The default available types are **Active Directory**, **Windows NT**, **Local Users and Groups on XS** and **Custom Users and Groups**.

The content under the **Directory Server** section depends on which type of resource you have added. If **Active Directory** is selected, an LDAP path will be used. If **Windows NT** is selected, a WinNT path will be used. If **Local Users and Groups on XS** is selected, an internal protocol (Local:) will be used and if **Custom Users and Groups** is selected, an internal protocol (Custom:) will be used. The **Directory Server** setting does not have to be configured for **Local Users and Groups on XS** or **Custom Users and Groups**, instead a resource will be created on the underlying platform and QlikView Publisher 8 internal parameters.

If **Active Directory** or **Windows NT** has been selected, enter the path you want to connect to or click **Get Default** to get a path from the available directory service or a list of available Windows NT servers.

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It is also possible to enter new *Directory Services* using the *Directory Service Controller* and create your own *Directory Service Provider* for any Directory Service that is not by default included in QlikView Publisher 8. Please refer to the *Directory Service Controller* part of the Detailed Technical information part of this manual.

For information about what is found under the **Advanced** link please refer to the *Directory Service Controller* part of the Detailed Technical information part of this manual.

Your **Directory Service Resource** is now ready to be used.

3.4.5 Register a Source Document Folder Resource

In order to add a **Source Document**, you need a **Source Document Folder Resource**. To register a **Source Document Folder Resource**, navigate to **Resource Management**, then click **Source Document Folder Resource** under **Add Infrastructure Resource**.

The screenshot shows the QlikView Publisher 8.0.0 Enterprise Edition interface in a Windows Internet Explorer browser. The address bar displays the URL `http://localhost/ControlPanel/Resources/ResourcesMain.aspx`. The page title is "QlikView Publisher 8.0.0 Enterprise Edition". The main content area is titled "Resource Management" and shows a table of resources. The table is divided into two sections: "Execution Service Resources" and "Other Resources".

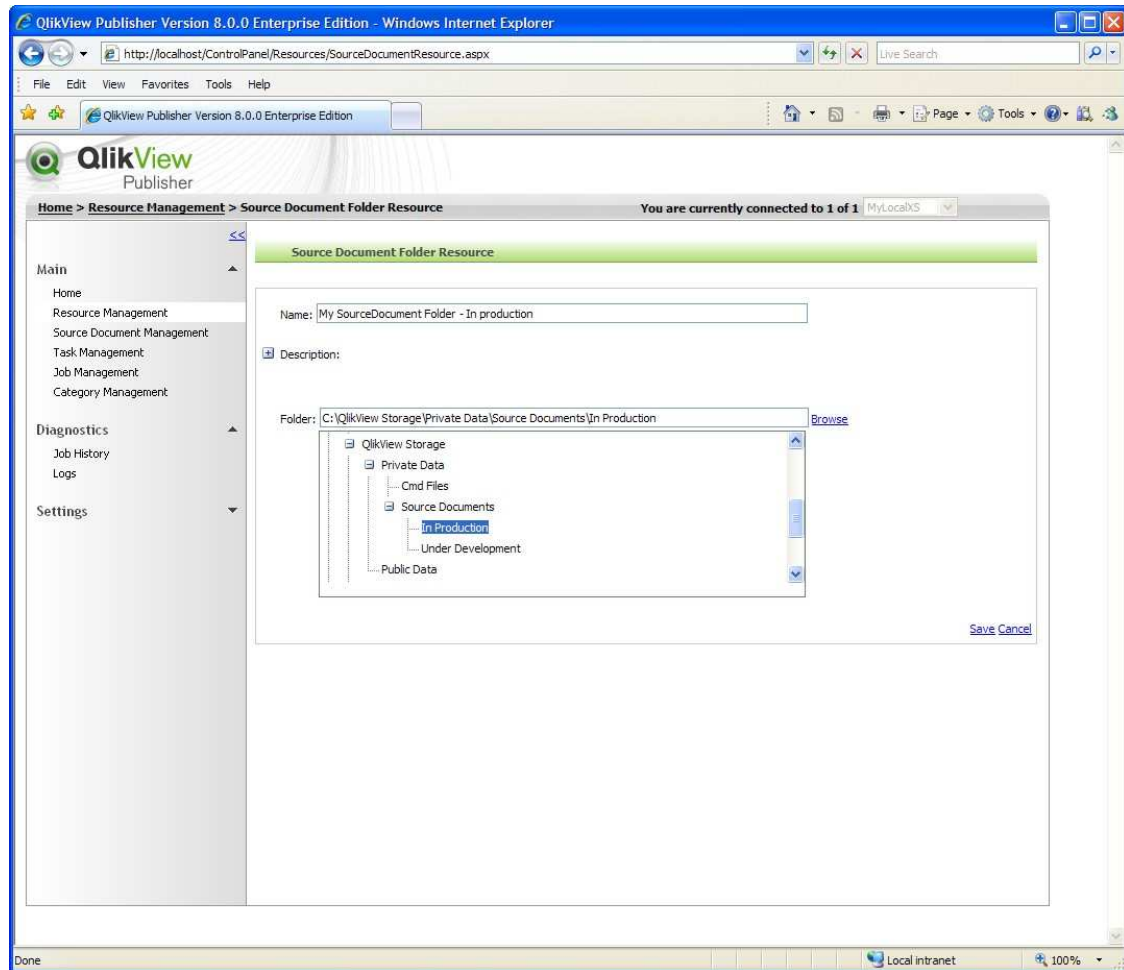
Name	Description	ResourceType	Edit
MyLocalMS		ExecutionService	Edit

Name	Description	ResourceType	Edit
MyAD		DirectoryService	Edit

The left sidebar contains a navigation menu with the following items:

- Main
 - Home
 - Resource Management
 - Source Document Management
 - Task Management
 - Job Management
 - Category Management
- Standard Actions
 - Create Copy
 - Clear Selections
 - Delete This Resource
- Add Infrastructure Resource
 - ExecutionService Resource
 - Directory Service Resource
 - E-mail Server Resource
 - Source Document Folder Resource
- Add Distribution Resource
 - AccessPoint Resource
 - Distribution Folder Resource
 - E-mail Distribution Resource
- Diagnostics
 - Job History
 - Logs
- Settings

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Enter a name for your **Source Document Folder Resource**. Under **Description**, you can enter a descriptive text of the resource. The description will be shown in the resources overview list. Browse to a folder that contains, or will contain, **Source Documents**. Your **Source Document Folder Resource** is now ready to be used.

You have now set up all the basic resources that are needed in order to start using QlikView Publisher 8.

3.5 Upgrading from QlikView Publisher 4 to 8

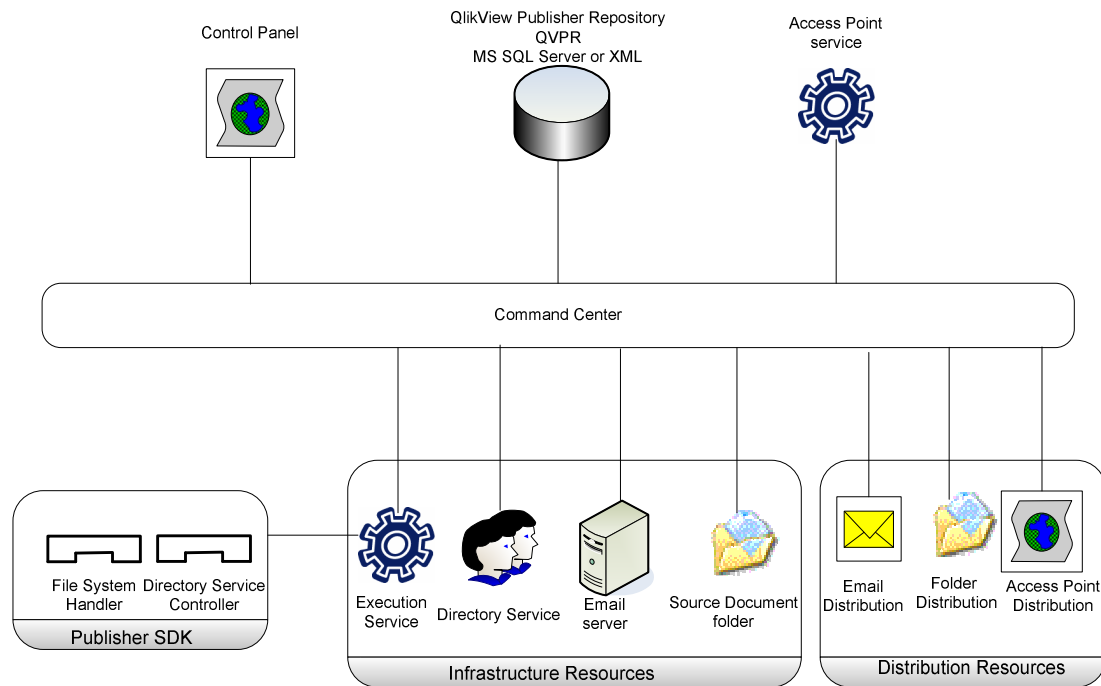
If you have been using QlikView Publisher 4 and want to upgrade to version 8 without losing your settings, tasks and jobs etc, follow these steps:

1. Stop the IIS and the XS Service.
2. If you are using an XML repository as your QlikView Publisher Repository then copy the entire folder containing the QVPR, the default folder is "C:\Program Files\QlikView\Publisher\CommandCenter\App_Data\" and the name of the database that you gave it during installation.

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3. If you are using a SQL Server as your QlikView Publisher Repository then you do not need to copy anything.
4. Uninstall QlikView Publisher 4 through Add or Remove programs
5. Do a normal installation of QlikView Publisher 8
6. Apply the LEF
7. If you were using an XML repository, move the folder to "C:\Documents and Settings\All Users\Application Data\QlikTech\Publisher\CommandCenter\"
8. Point to your new database in the QVPR setup

4 Detailed technical view of QlikView Publisher 8



Welcome to QlikView Publisher 8, the latest version of QlikTech’s administration and security tool.

An organization contains different roles; process owners, system administrators and data consumers. Each of these roles has different responsibilities and performs different tasks. This is reflected on the demands that these different roles have on the product. *QlikView Publisher 8* meets these demands through the introduction of *User Profiles*, a feature that lets the members of each individual role work with the tasks that concern them.

The central part of the QlikView solution is not the data but the user. Implementation and deployment is done depending on the demands from the organization. The deployment can then easily be scaled to meet new demands. Deploying *QlikView Publisher 8* is easy. Install the product and enable the functionality that you will use. The product can be deployed on a single computer for small business solutions or distributed on different servers to utilize the infrastructure in the most efficient way.

QlikView Publisher 8 comes in two editions; a *Standard* edition and an *Enterprise* edition. The *Standard* edition adds reloading and scheduling capabilities to the QlikView installation and the *Enterprise* edition brings the full QlikView Publisher toolkit to the customer.

4.1 Architecture

The QlikView Publisher 8 architecture is centered on the use of services. Each service is a building block that contributes to the overall functionality with a certain functional area. Service-Oriented Architecture, SOA has many advantages; the application can be scaled to meet the demands of the organization and deployments can be rapidly re-structured to fit new infrastructural needs.

Think of the architecture as a set of LEGO® pieces. You only need a few pieces to build a small, basic structure. To build a larger, more complex structure, you'll need all of the pieces and more than one of each type. This makes a distributed installation both possible and effective. By deploying the services on more than one server, three problems are solved. First of all, the work-load of QlikView Publisher can be increased since more tasks can be performed within the same time period. Secondly, the utilization of the hardware is optimized since the server's processor and memory can be allocated in full to the service. Thirdly, the fault tolerance and maintainability of the system increases. Should a computer be taken off-line, a second machine can be assigned the tasks that the first one was set to perform.

4.1.1 QlikView version

QlikView Publisher 8 is part of the QlikView 8 Suite and you will get the most out of your QlikView experience if you use the same version of QlikView, QlikView Server and QlikView Publisher. QlikView Publisher 8 however is compatible with older versions of QlikView as well.

4.2 Concepts

4.2.1 Standard and Enterprise edition

The *Standard Edition* is a limited version of QlikView Publisher 8 with reloading and scheduling capabilities only and it supports one XS. The *Enterprise Edition* contains the full range of QlikView Publisher functionality. The number of simultaneous XS' depends on the license.

4.2.2 General terminology

4.2.2.1 Tasks

There are 7 kinds of tasks. A task answers the question "What" should be done.

4.2.2.1.1 Reload Task

A *Reload task* reloads and refreshes the data in a *Source Document* or the *Source Documents* in a *Source Document Set*.

4.2.2.1.2 Distribution Task

A *Distribution task* produces a *Distributed Document*, a distributed version, based on a *Source Document*. This type of task is only available in Enterprise Edition.

4.2.2.1.3 Repeat Task

A *Repeat task* repeats a number of other tasks like reloads and uses each value of the variable once until all values have been used in one iteration. This type of task is only available in Enterprise Edition.

4.2.2.1.4 External Program Task

An *External Program tasks* execute a command line statement. This type of task is only available in Enterprise Edition.

4.2.2.1.5 Pause Task

Pause Task pauses during a specified time or until a specified time. This type of task is only available in Enterprise Edition.

4.2.2.1.6 DbCommand Task

External Program tasks execute a SQL command using a connectionstring . This type of task is only available in Enterprise Edition.

4.2.2.1.7 EDX Task

EDX Tasks triggers a job using Event Driven Execution (EDX). You need to select which XS and which job should be executed. This type of task is only available in Enterprise Edition.

4.2.2.2 Jobs

Jobs contain one or more tasks combined in a task flow. A *Job* is triggered on a schedule with a recurrence pattern or through *Event Driven Execution (EDX)*. A job answers the question "When" should it be done.

4.2.2.3 Source Documents

Source Documents are QlikView documents that contain data that is to be made accessible to end-users in the form of *Distributed Documents*.

4.2.2.4 Source Documents Sets

Source Document Sets are collections of *Source Documents*. A *Source Document Set* can be added to a *Reload task*.

4.2.2.5 User Profiles

A *User Profile* determines which functional areas a user is allowed to view and manage within QlikView Publisher 8.

4.2.2.6 Categories

Categories bundle *Distributed Documents* in containers to make categorization easier for the end-user. *Categories* are only visible to the end-user in an *AccessPoint*. *Categories* are only available in Enterprise Edition.

4.2.3 Resources

A resource is a component that provides a service and that is available over time. A resource is registered and re-used within QlikView Publisher. Some resources are tied to a specific *XS*.

4.2.3.1 Infrastructure resources

Infrastructure resources include *XS resources*, *Directory Service resources*, *E-mail Server resources* and *Source Document Folder resources*.

4.2.3.2 Distribution resources

Distribution resources include *AccessPoint resources*, *Distribution Folder resources* and *E-mail Distribution resources*.

4.2.3.3 Execution Service (XS)

The *Execution Service (XS)* interacts with the QlikView documents and the different resources. An *XS* performs reloads and distributions of QlikView documents.

4.2.3.4 AccessPoint

AccessPoint resources are web-based end-user interfaces for *Distributed Documents*. Along with *E-mail distribution* and *Distribution Folders*, *AccessPoints* give the user access to *Distributed Documents*. *AccessPoint* is only available in the *Enterprise* edition.

4.2.3.5 Distribution Folders

Distribution Folders contain *Distributed Documents* sorted in folders. The individual folders and contained documents have individual NTFS permissions. *Distribution Folders* are only available in the *Enterprise* edition.

4.2.3.6 E-mail Servers

An *E-mail Server* is used for distributing documents and sending alerts. Distribution through *E-Mail Server* is only available in *Enterprise* Edition, but *Standard* Edition can send alert Emails.

4.2.3.7 Directory Services

Directory Services provide a connection to the Directory Service that holds your users. Through the *Directory Service Controller* you can create your own *Directory Service Provider* and write code for dealing with users in Directory Services that are not by default included in QlikView Publisher 8. *Directory Services* are only available in the *Enterprise* edition.

4.2.4 Users and User Profiles

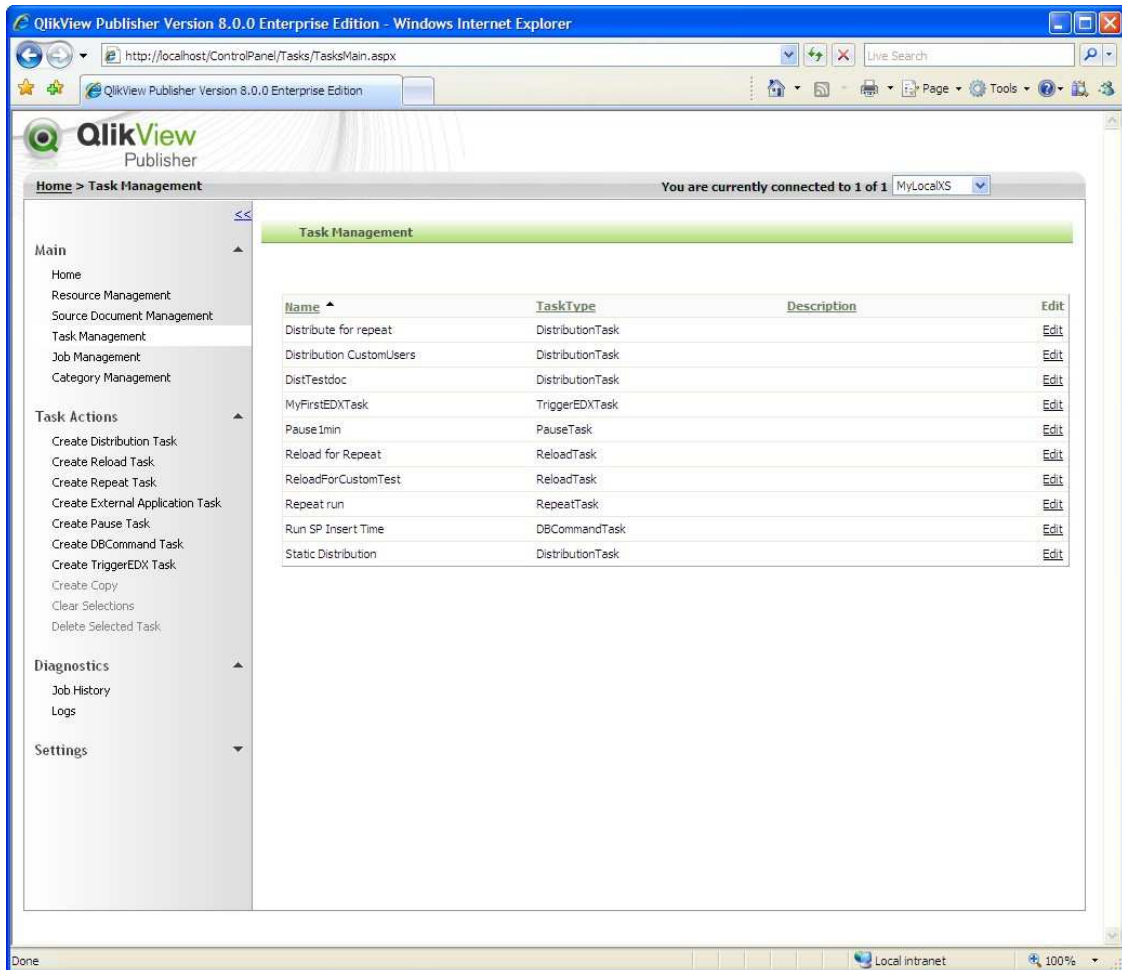
QlikView Publisher 8 determines access to different functions within the application through the use of *User Profiles*. *User Profiles* are based on different types of users and their demands and needs.

QlikView Publisher 8 contains two different *User Profiles*: *Administrators* and *Power Users*. An *Administrator* has unrestricted access to the application. A *Power User* is allowed to perform any operation within the application except setting up and changing the fundamental settings.

A user is assigned to a *User Profile* by an administrator.

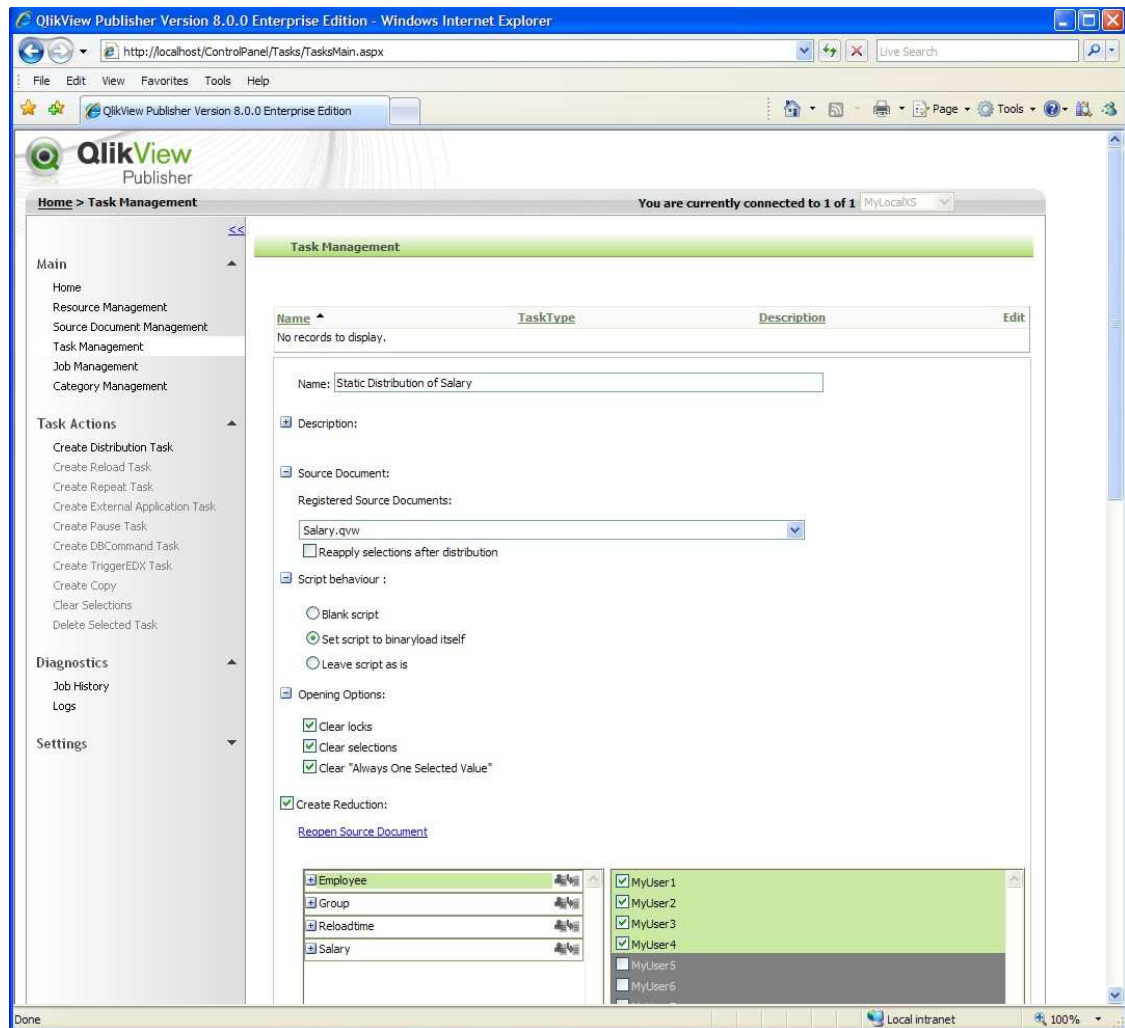
4.3 Task Management

QlikView Publisher 8 contains seven different forms of tasks; *Reload task, Distribution task, Repeat task, External Application task, Pause task, DBCommand task and EDX task*. Tasks are the building blocks that form work flows; a chain of events that reflect the processes and work flows within the organization. A task is executed by a *Job*. The *tasks* of QlikView Publisher can be contained in as many *Jobs* as the user wishes in order to form different task flows.

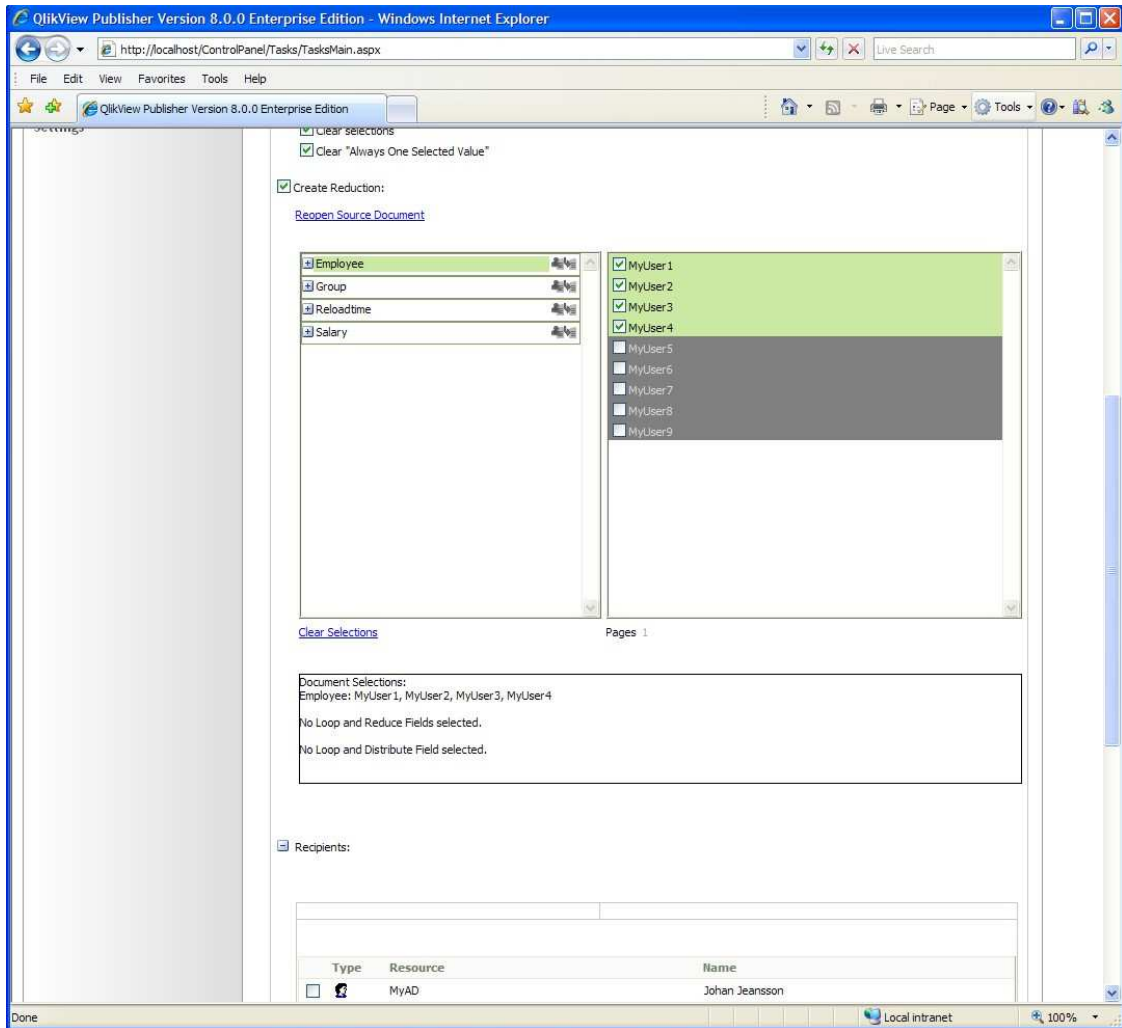


4.3.1 Distribution Task

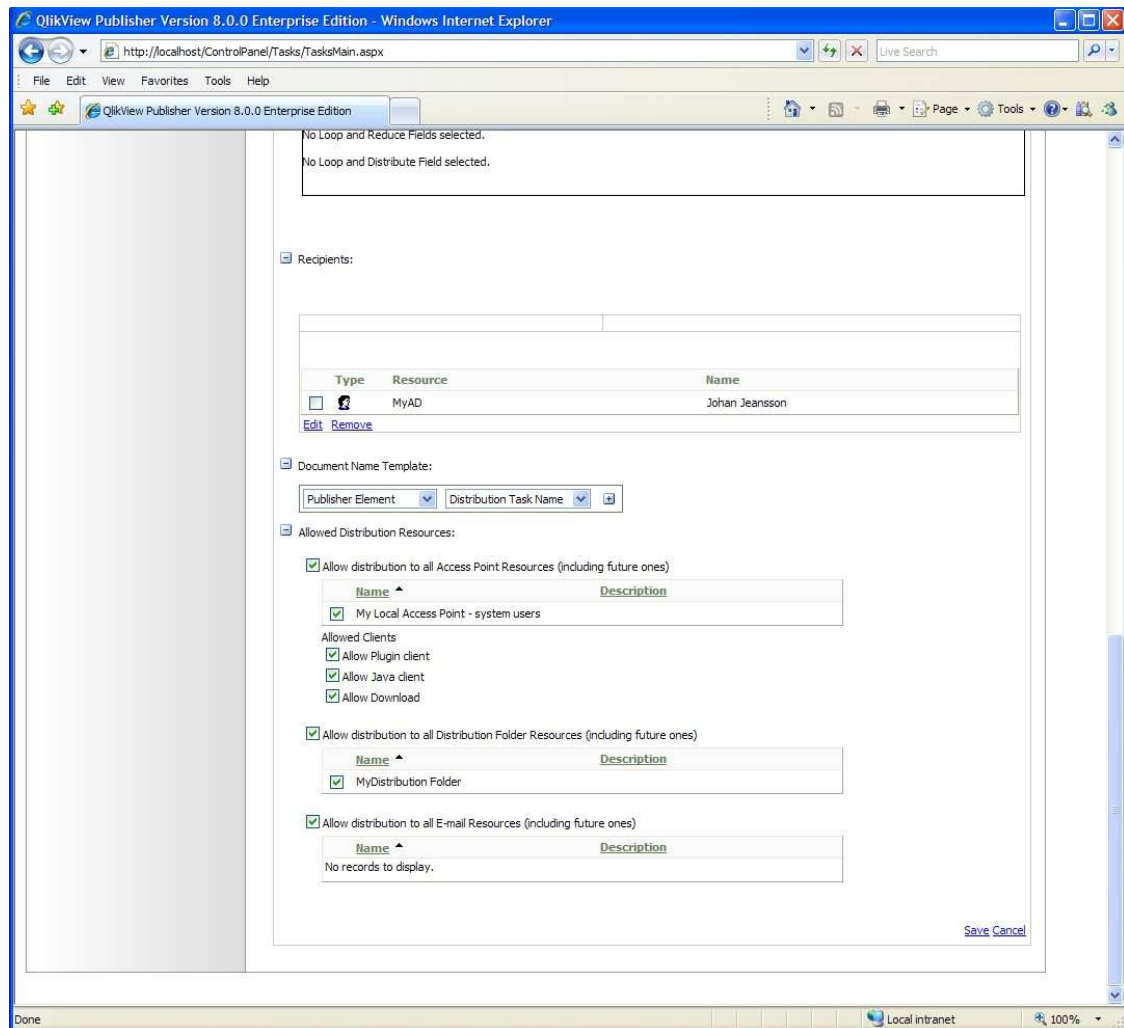
A *Distribution task* makes the data in a *Source Document* available to the users. The *Distributed Document* is either a reduced version of the *Source Document* or an un-reduced copy with all of the original data.



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4.3.1.1 Available options and settings

- **Name.** The name that identifies the *Distribution task*.
- **Description.** A descriptive text of the *task*.
- **Source.** The *Source Document* that the *Distribution task* is based upon.
- **Script behavior**
 - **Blank Script.** This will remove the entire script from the distributed file.
 - **Set script to Binary load itself.** This will set the script to allow a reload from itself. No new data will be entered.
 - **Leave script as is.** This will leave the entire script as is. This is not a recommended way of distributing files since each user can reload the script from their own distributed file.
- **Opening Options**
 - **Clear selections.** This option will clear any selected values in the distributed document
 - **Clear locks.** This will clear any locks in the distributed document.
 - **Clear "Always one selected value".** This will clear the "Always one selected" flag from a distributed document.

- **Create Reduction.** The data that the *Distributed Document* will contain. If this setting is omitted, no reduction will be performed and the *Distributed Document* will be a copy of the *Source Document*. If Use Reduction is selected, the selected values (and all associated fields and values) will form the content of the *Distributed Document*.
Each field contains the two following options:
 - Loop and Reduce. This can be done over *All values in field* or over *Values in range*. See below.
 - Loop and Distribute. This option is available when the field is expanded. See below.
- **Recipients.** The users that will be given access to the *Distributed Document*. The *effective distribution permissions* are a combination of this setting and the recipients assigned to the resource the document is distributed through.
- **Document Name Template.** The name you want the *Distributed Document* to have. See below for more information.
- **Allow distribution to all AccessPoint Resources (including future ones)**
This setting allows or blocks distribution of the file to certain distribution resources. The default value is to allow it for all resources.
- **Allowed Distribution Methods.** This setting determines which methods of distribution will be used for that document.
The setting contains three options:
 - AccessPoint Resources.
 - E-mail Server Resources.
 - Distribution Folder Resources.

Loop and Distribute is a distribution based on the values of the field. The field must contain values that correspond to the drop-down list Value type. Possible values are Security Identifier, User and Group name, SAM Account Name or E-mail Address.

The Loop and Reduce option contains two alternatives; **All values in field** and **Values in range**. **All values in field** will result in a reduction on each and every value in the field at the time of the execution of the task. **Values in range** lets the administrator select a number of values in the field and loop over these values.

Document Name Template is used to create unique names. This becomes very important when doing *Loop and Reduce* and *Loop And Distribute*, because if all the files have the same name, all but the last file will be overwritten. You have 4 main menu options to choose from:

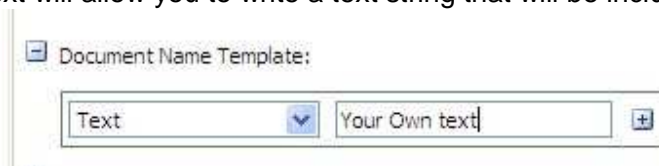
Text

Publisher element

Document Field value

Date Time

Text will allow you to write a text string that will be included



Publisher Element



Distribution Task Name: The name of the Task distributing the file.

SourceDocument Name: The name of the Source Document

Job Name: The name of the Job in which the distribution task is located.

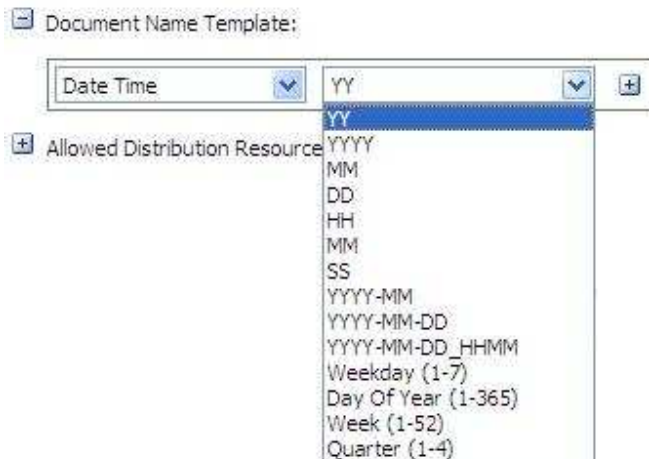
AutoNumber: An automatic number that will be incremented each time the task is moved to a different XS.

Subfolder: This will create a subfolder with the name you specify.

Repeat Task Variable: The name and value of the variable used in a repeat task. For example: MyRegion=North.qvw



This names the file with the value of the field from your QlikView Document.



This will show the date and time in the format you select.

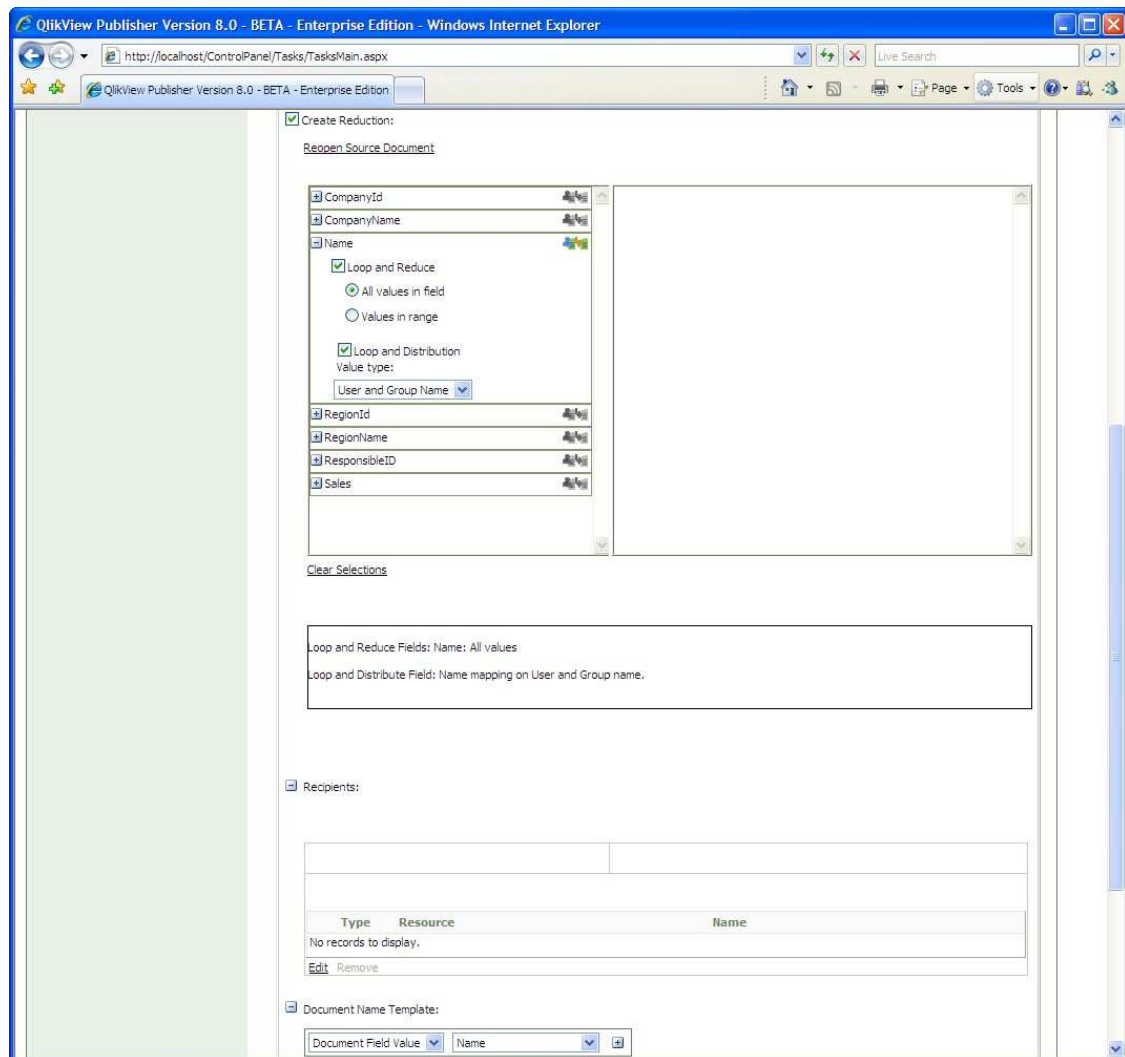
4.3.1.2 How to create reductions

QlikView Publisher allows you to make reductions in the files you distribute. These reductions can be dynamic or static. A static reduction is when you select one or more values that will be reduced on. For instance the first screenshot under 4.3.1 is a static

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reduction on the region "West". A dynamic reduction is when no specific value is chosen but either all values in the field, or all values in a given range are used.

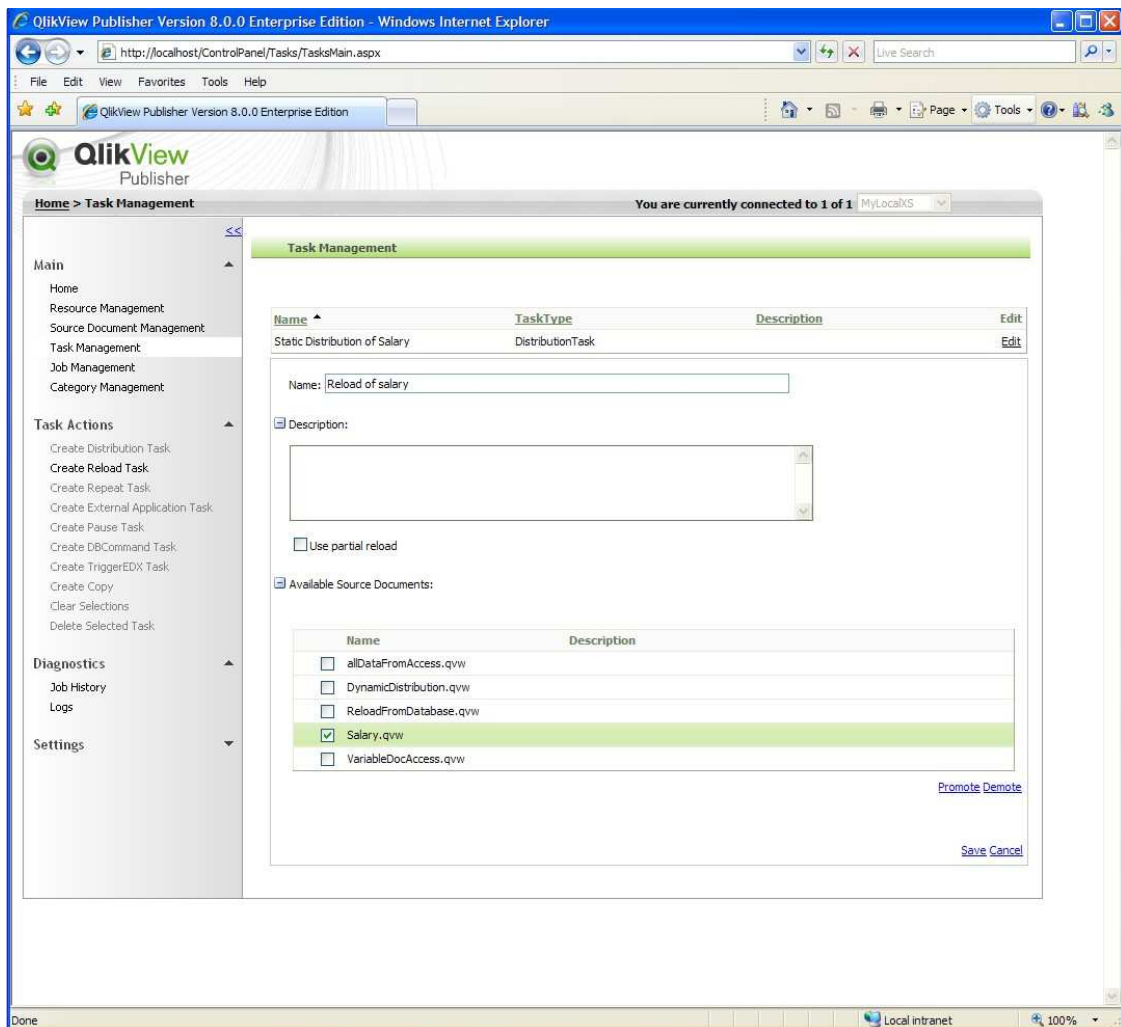
A common scenario is to make a dynamic reduction (*Loop and Reduce*) and a dynamic distribution (*Loop and Distribute*). Then you reduce the source document based on which data each user has access to and also each file is distributed to each user, without selecting them as *recipients* on the *distribution task*.



The picture above shows that the field Name in the QlikView file will be used to *Loop and Reduce* and *Loop and Distribute*. The information in the field will be matched against User or Group name. Also note that the name of each distributed file will be the name of the user since the *Document Name Template* is set to naming each file with the value from that field. Setting a dynamic naming of the files when making dynamic distribution is extremely important. If you use the same name all files except the last will be overwritten.

4.3.2 Reload Task

A *Reload task* refreshes the data in *Source Documents*. A *Reload task* can contain one or more *Source Documents* and *Source Document Sets*.



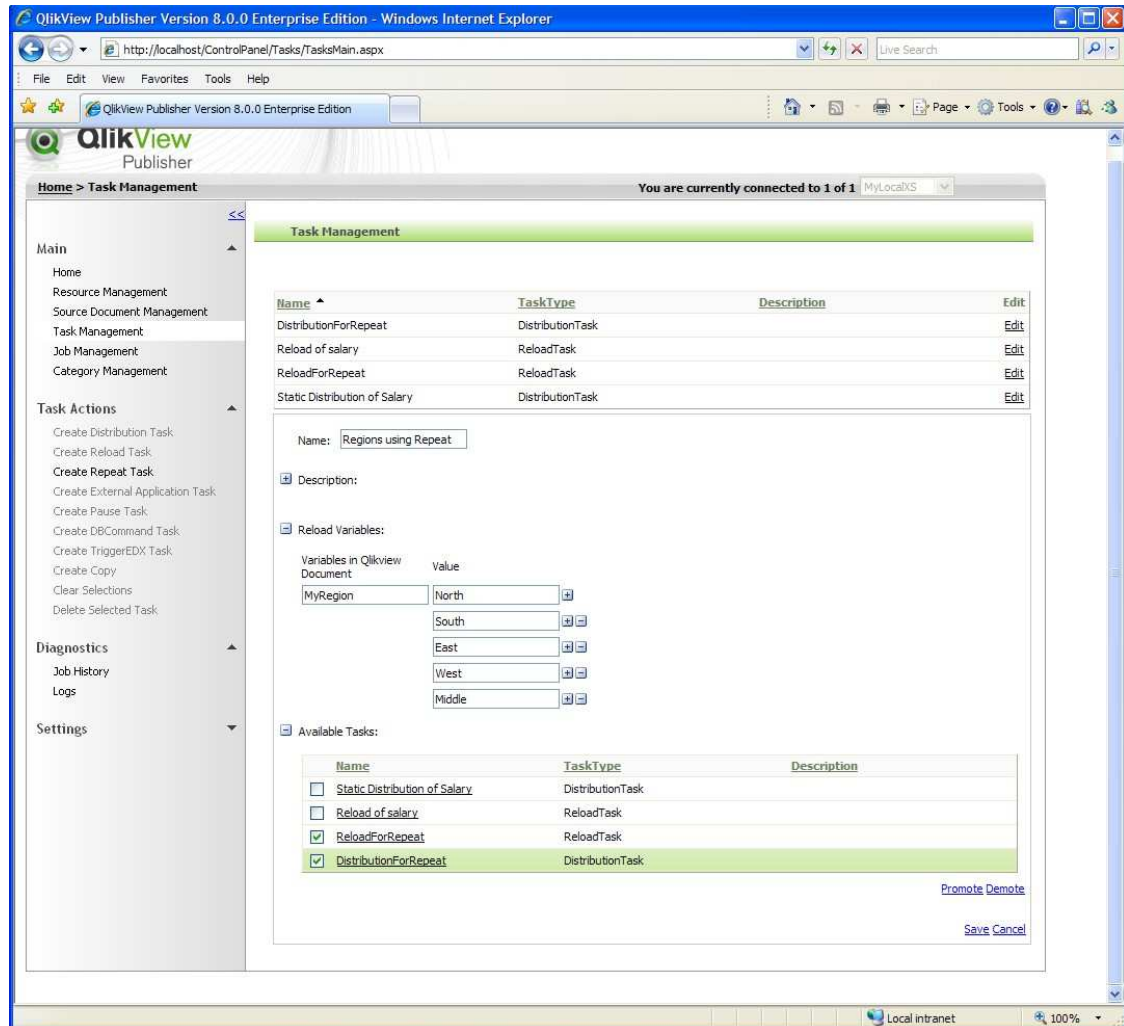
4.3.2.1 Available options and settings

- **Name.** The name that identifies the *Reload task*.
- **Description.** A descriptive text of the task.
- **Use partial reload.** This allows you to use the partial reload of *QlikView*.
- **Available Source Documents.** The *Source Documents* and *Source Document Sets* that are available from the current XS.

4.3.3 Repeat Task

A *Repeat task* iterates over one or several *Reload tasks* with the option of passing a variable to the *Source Document* at each iteration.

A *Repeat* task typically contains *Reload* tasks and *Distribution* tasks ordered so that the *Source Document* is utilized after each iteration with a variable.



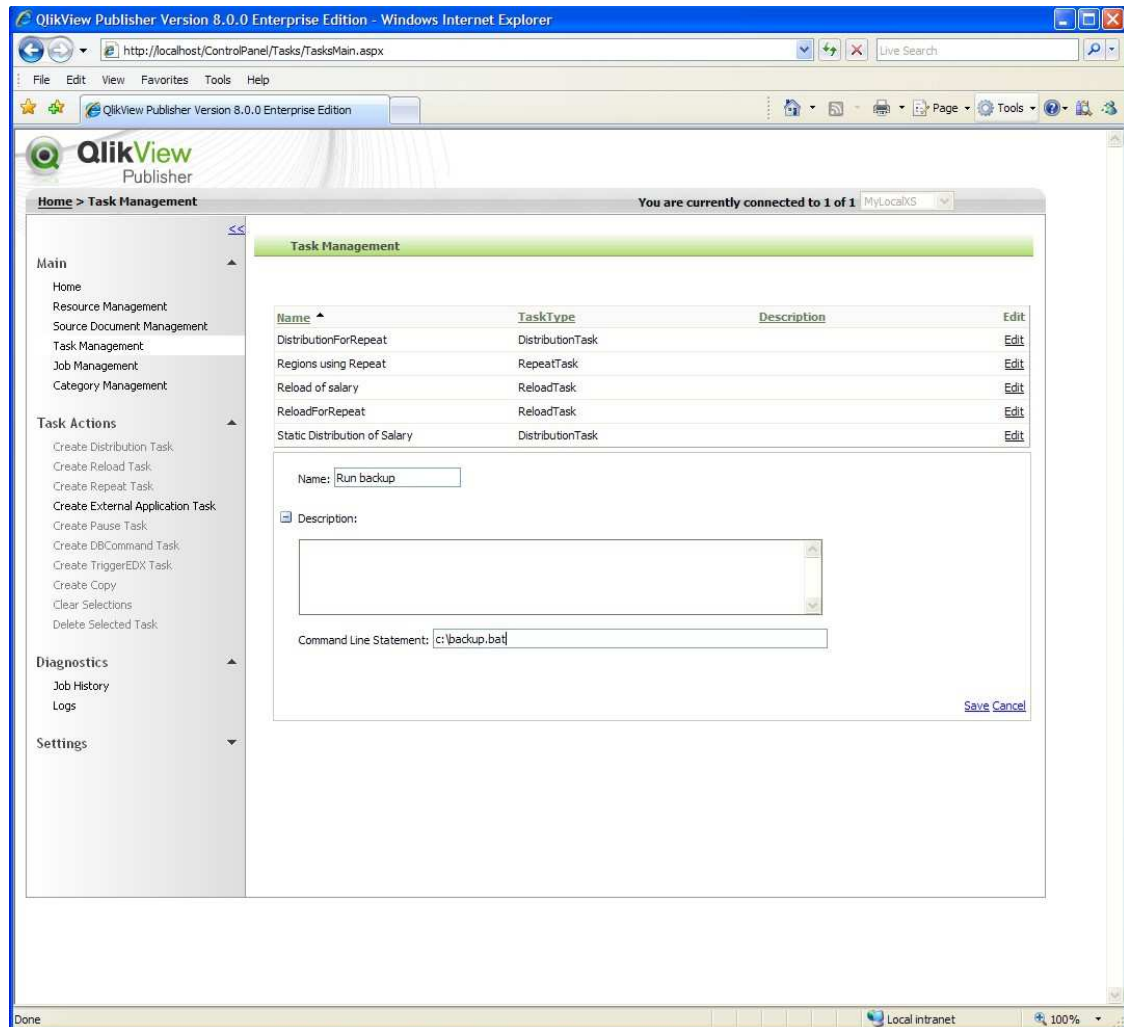
When adding the repeat task to a job, only add the repeat task. The tasks you select inside the repeat task are automatically included.

4.3.3.1 Available options and settings

- **Task Name.** The name that identifies the *Repeat* task.
- **Description.** A descriptive text of the task.
- **Reload variables.** The variables that will be passed to the *Source Documents* on each iteration. The number of iterations is controlled by the number of variables, i.e. one iteration per variable.
- **Available tasks.** The *Reload* tasks and *Distribution* tasks that the *Repeat* task will contain.
- **Promote/Demote.** Sets the order of execution within the *Repeat* task.

4.3.4 External Application Task

An *External Application task* executes a command line statement.

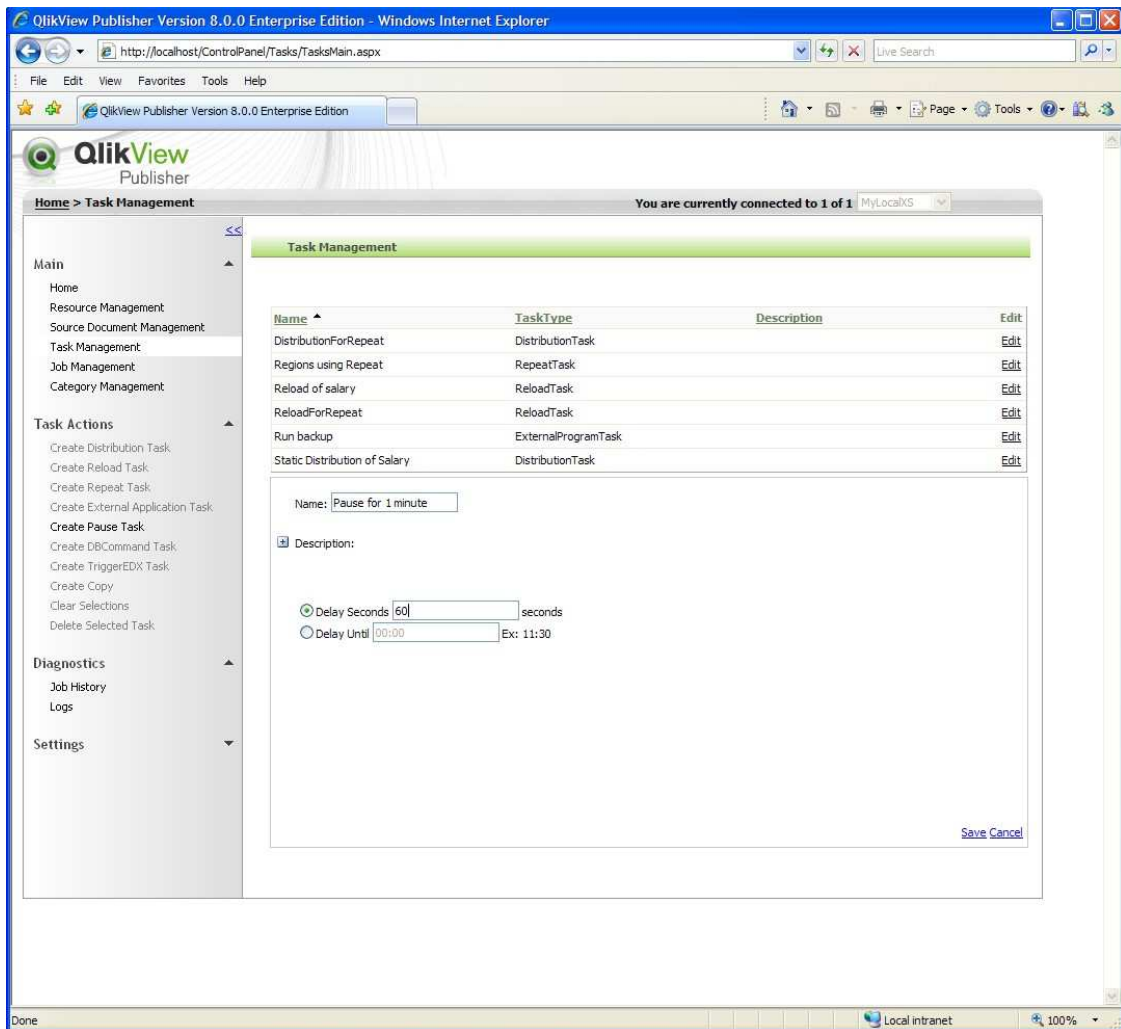


4.3.4.1 Available options and settings

- **Command Line Statement.** The command line statement that will be executed. Please note that you must use quotation marks around your path if it contains a space.

4.3.5 Pause Task

A Pause Task will pause the current job either for a given time or until a given time.

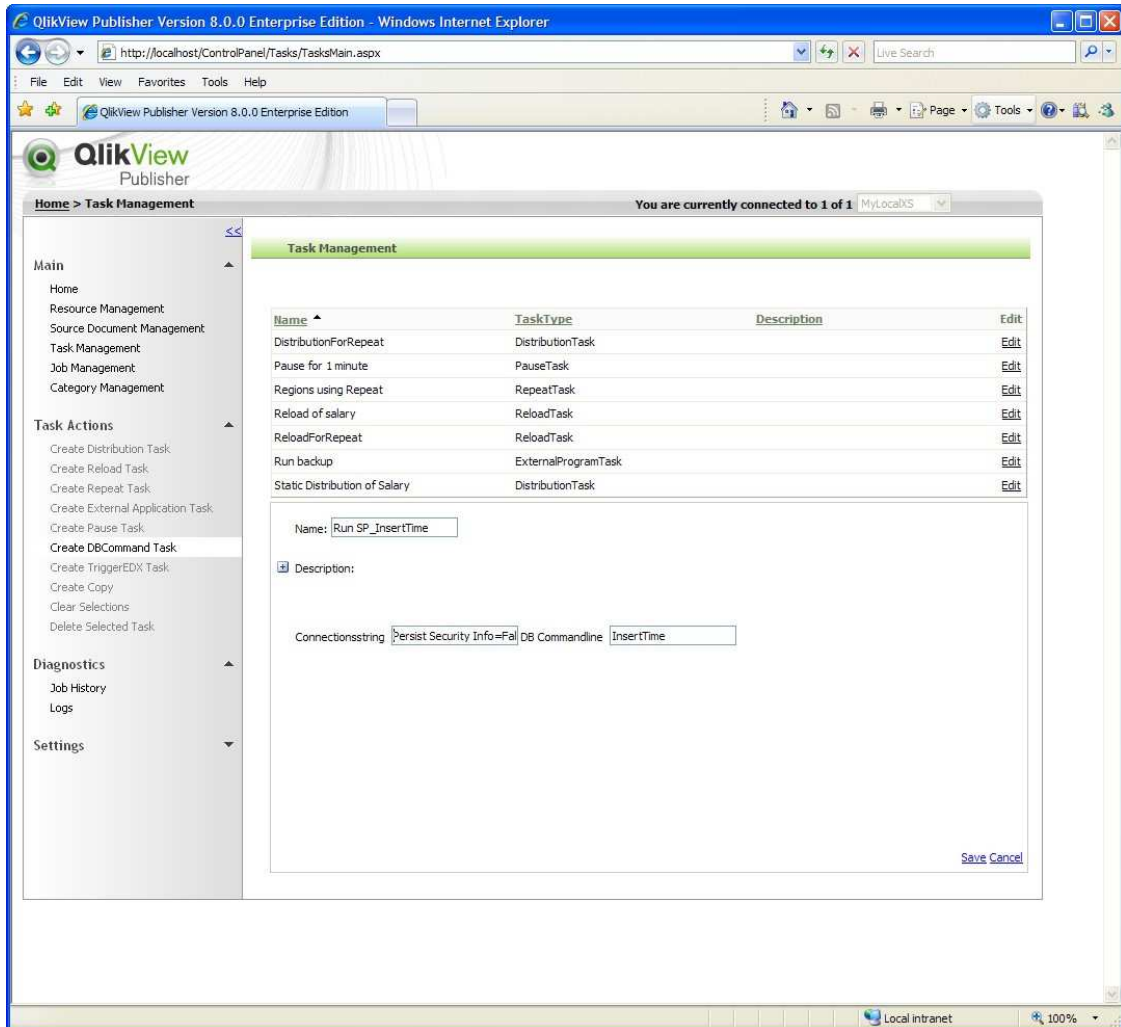


4.3.5.1 Available options and settings

- **Description.** A descriptive text of the task.
- **Delay seconds.** The Task pauses for this many seconds.
- **Delay until.** The Task pauses until the specified time.

4.3.6 DB Command Task

A DBCommand task allows you to run any command against a database.

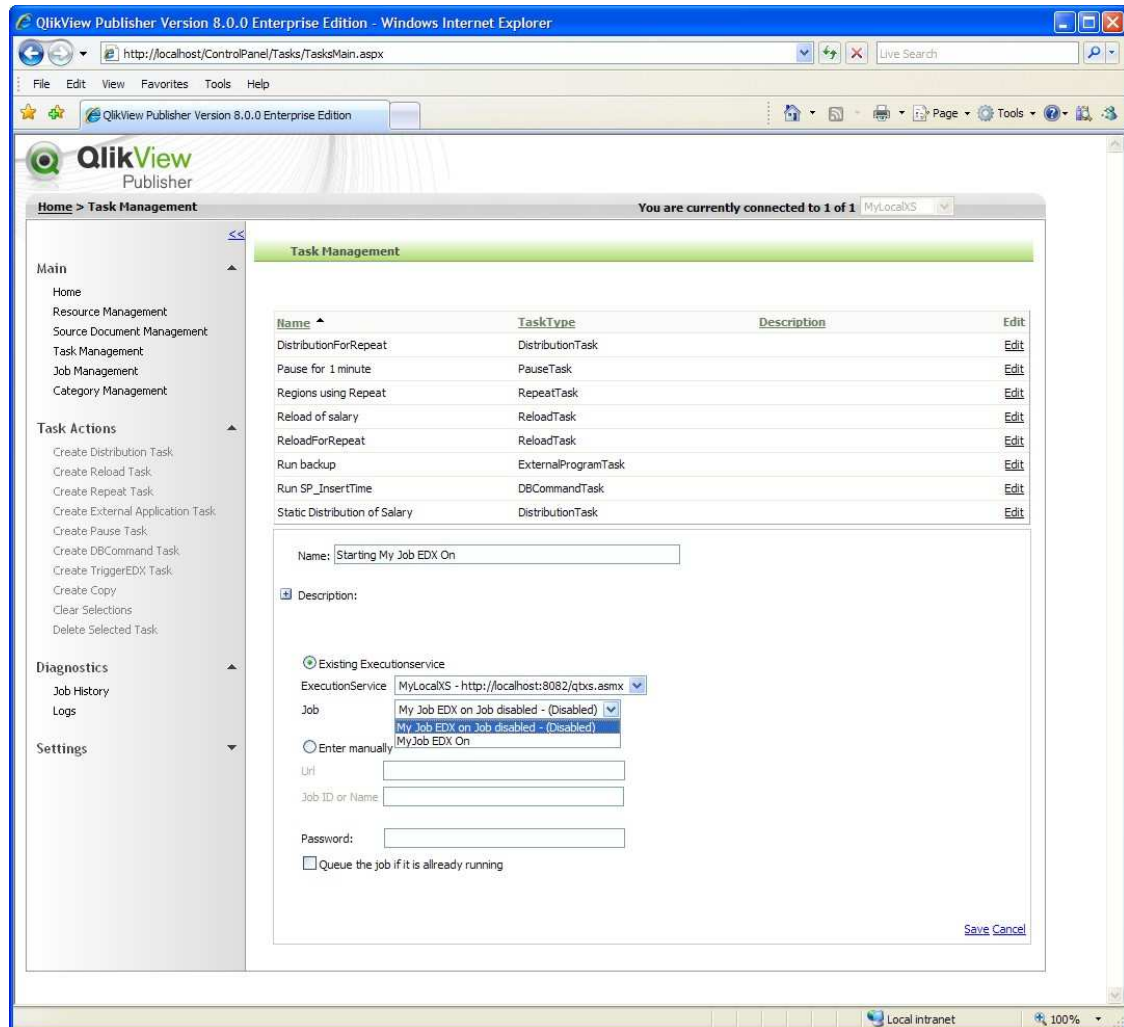


4.3.6.1 Available options and settings

- **Description.** A descriptive text of the task.
- **ConnectionString:** The connectionstring that will be used for connecting to the database.
- **DB Commandline:** The statement that will be executed. This can be any command that the database will recognize (stored procedures or SQL statements).

4.3.7 Trigger EDX Task

An EDX Task is used to start another job that is registered for EDX. This can be used to "chain" jobs together.

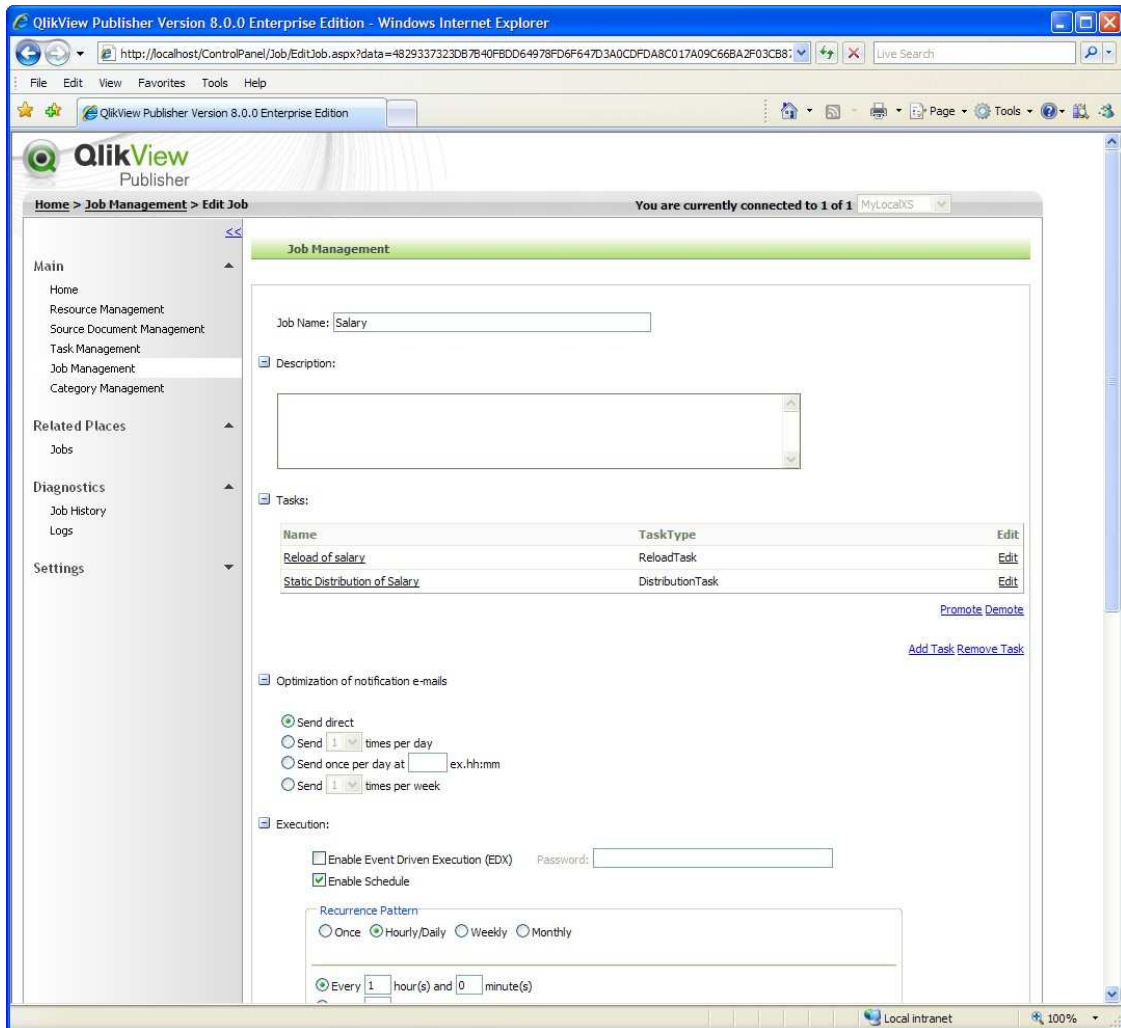


4.3.7.1 Available options and settings

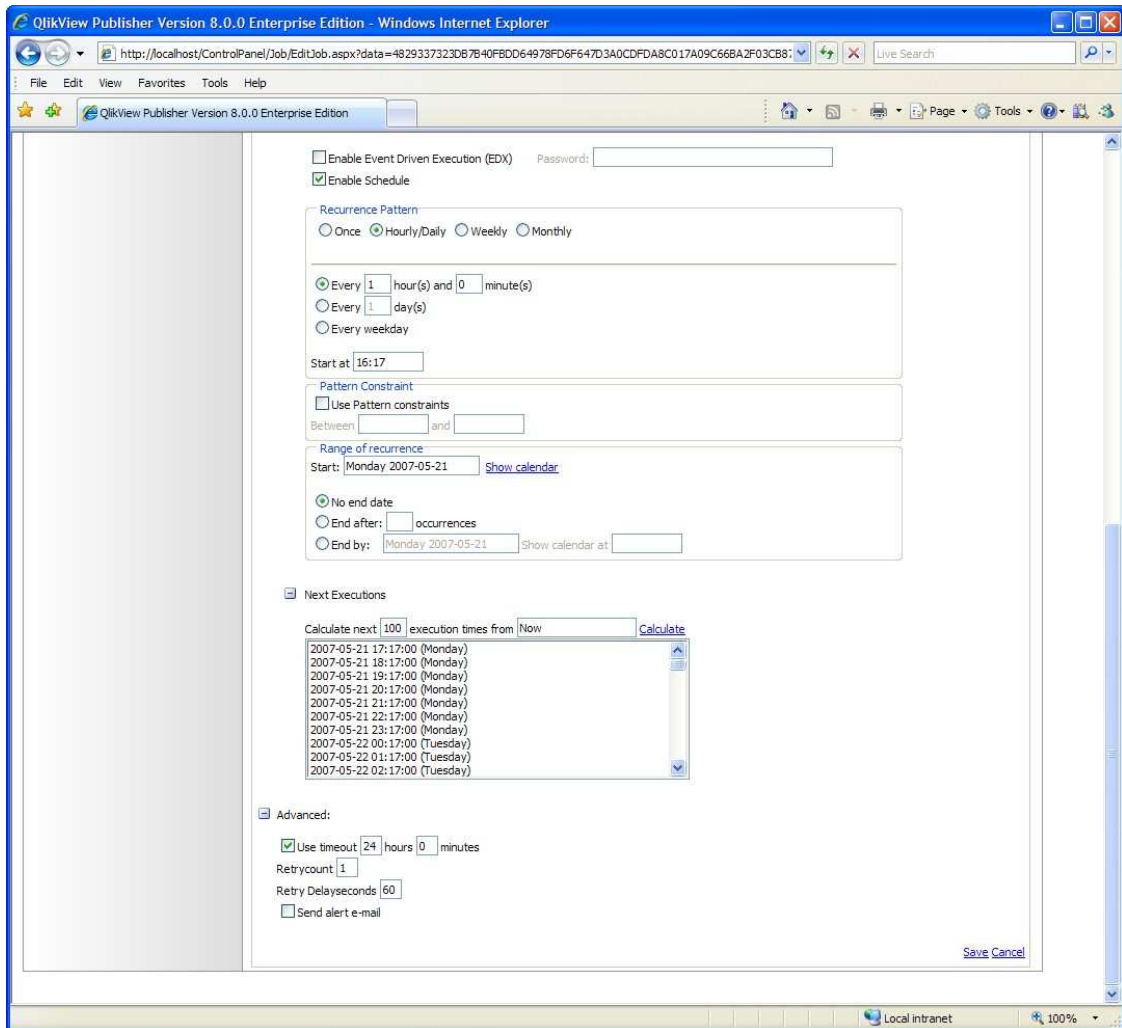
- **Description.** A descriptive text of the task.
- **Existing Execution Service.** This lists all registered Xs that are currently available.
- **Job.** Lists available jobs that are registered for EDX on the chosen XS. Jobs that are disabled can still be selected but will not be run until they are enabled again.
- **Enter manually.** This allows you to set up a Trigger EDX task on an XS that is currently not online or installed yet.
- **Password.** The password needed for triggering the job.
- **Queue the job if it is already running.** The default value is to not queue the job.

4.4 Job Management

The *Jobs* of QlikView Publisher 8 are core items for executing tasks. The *Jobs* contain different tasks and are either executed on a schedule or through *Event Driven Execution (EDX)*.



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4.4.1 Available options and settings

- **Job Name.** The name that identifies the *Job*.
- **Description.** A descriptive text of the *Job*.
- **Tasks.** Add and delete existing tasks to the *Job*.
- **Optimization of notification emails.** Here you set up how often notification mails for this job shall be sent. Available options are, Send direct, Send X times per day (the day will be divided into X slots and at the end of each slot the mails will be sent), send once per day at hh:mm, and send X times per week (this will act just as send x times per day but within a week instead of a day)
- **Execution.** The frequency and recurrence for the *Job*.
 - **Pattern Constraints.** This allows you to specify in which time interval you want your job to be run. All other times will be excluded.
- **Next Execution.** Allows you to verify that that you have entered the correct information in the Execution form above.
- **Advanced.**
 - **Use timeout.** Defines the timeout in hours and minutes.
 - **Retrycount.** How many times shall the job try if the first execution of a job fails.
 - **Retry Delayseconds.** The delay time between retry attempts
 - **Send alert e-mail.** Sends an alert e-mail to the recipients defined in the XS group resource.

4.4.2 Event Driven Execution

Event driven execution allows you to launch a job not on a schedule but rather when some event has occurred. There are three ways you can trigger the EDX job.

- 1 Making a web service call from your own program.
- 2 Accessing an URL inside QlikView Publisher 8.
- 3 Using EDX Task.

1 Writing your own program:

Add a web reference to the XS (in this case at localhost).

<http://localhost:8082/qtxs.asmx?WSDL>

Create a variable for it and then call the function RequestEDX.

Function RequestEDX(ByVal i_JobNameOrJobID As String, ByVal i_QueueIfAlreadyRunning As Boolean, ByVal i_Password As String) As eStartJobResult

QueueIfAlreadyRunning, lets you set if the job should be queued if it is already running.

The function returns a status of how the job went .

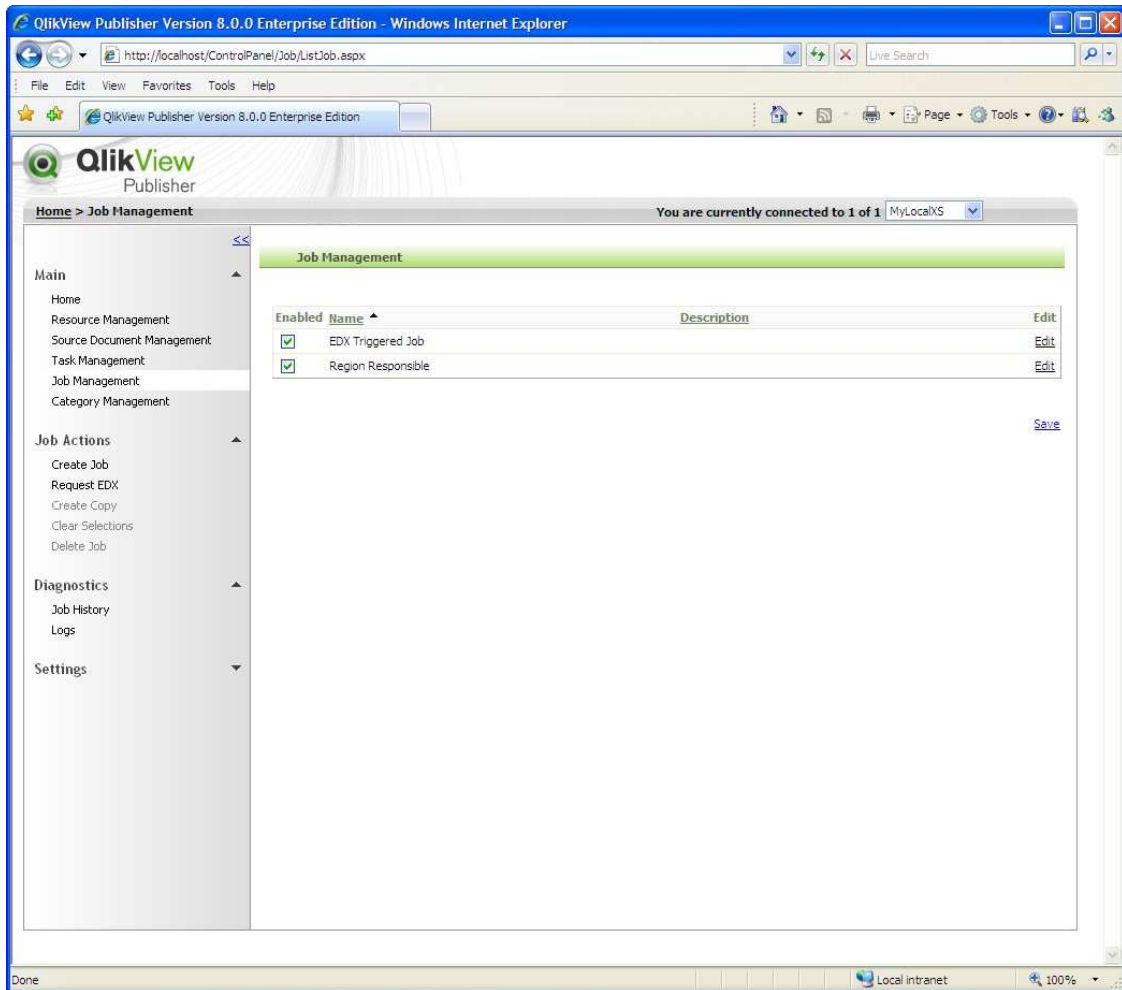
```
Public Enum eStartJobResult
JobWasNotFound
JobWasSuccessfullyStarted
JobsAlreadyRunningAndShouldNotBeQueued
JobsAlreadyRunningAndIsAlreadyQueued
JobsAlreadyRunningAndWasQueuedSuccessfully
JobsNotEDXEnabled
BadPassword
End Enum
```

Example:

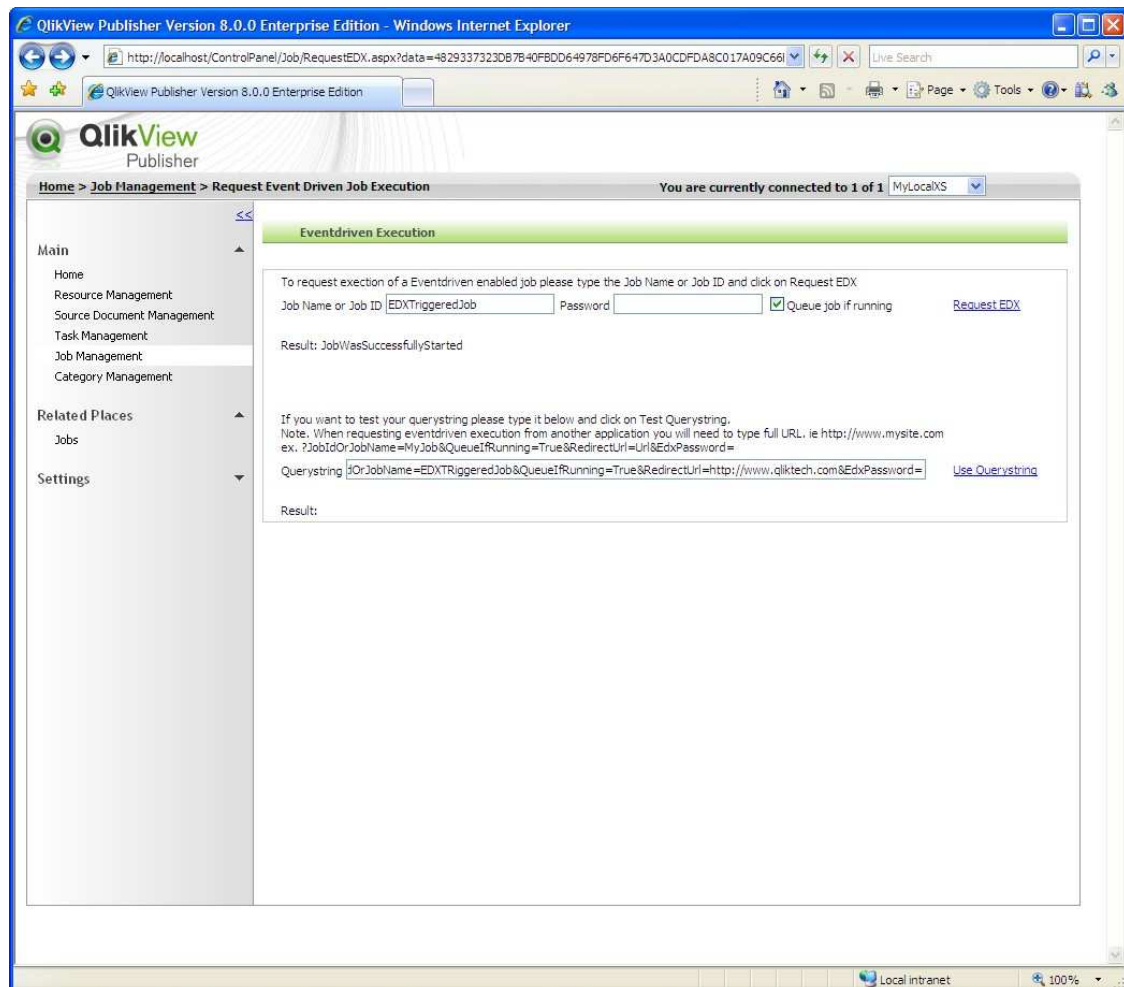
```
Dim I_ExecutionWebservice As New localhost.WebServiceHelper
I_ExecutionWebservice.RequestEDX("Job1", True, "")
```

- 2 Accessing an URL inside QlikView Publisher 8
Under Job Management you find the link to Request EDX

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You have two ways of using this page:

Either enter the job id or job name and trigger the job from this page by clicking the **Request EDX** link.

Use it to test the querystring that will be used to trigger the job from an external source.

An example string that would go into the querystring textbox is:

?JobIdOrJobName=EDXTriggeredJob&QueueIfRunning=True&RedirectUrl=http://www.qliktech.com&EdxPassword=

The name of the job that will be triggered is EDXTriggeredJob

The job will be queued if it is already running.

After the EDX has been executed the browser you are in will be redirected to the URL

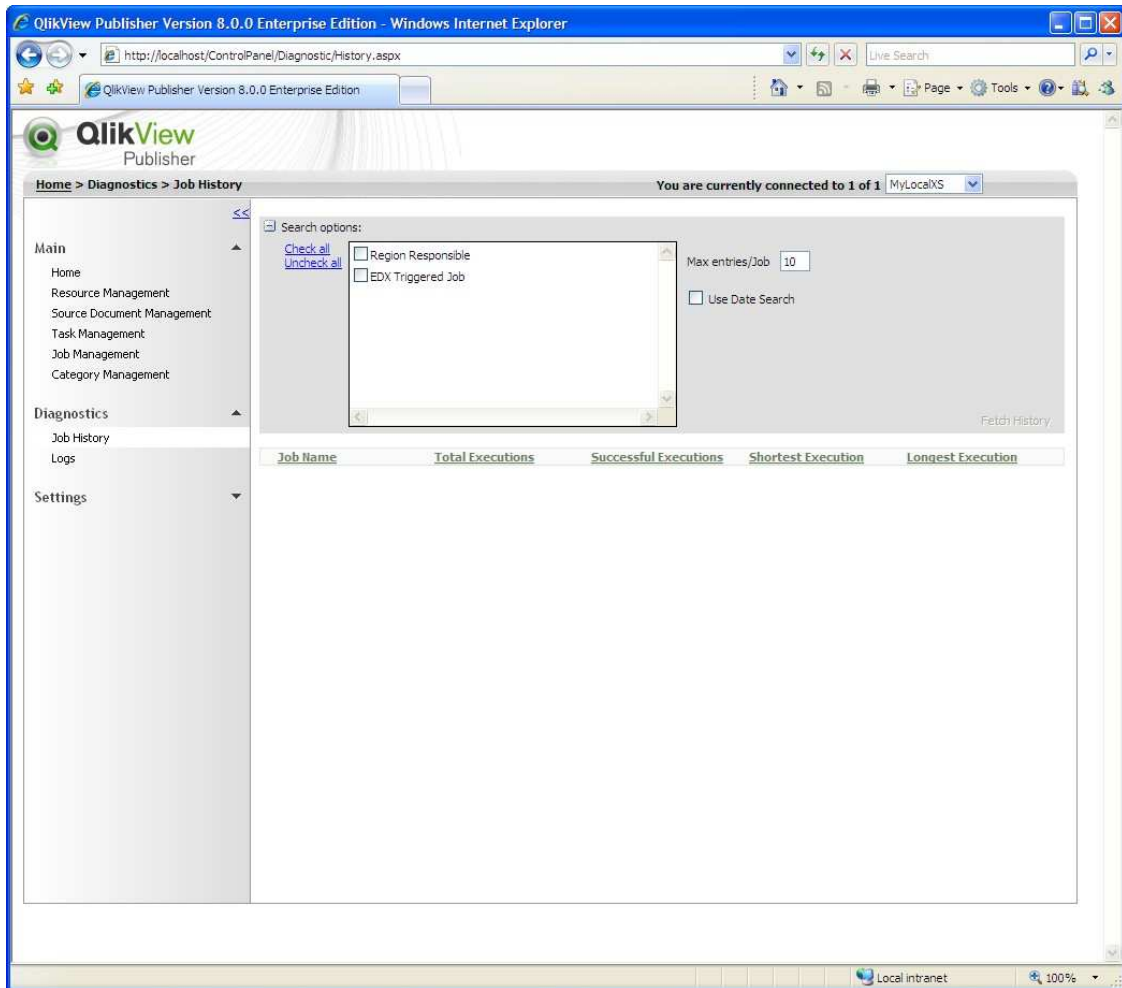
<http://www.qliktech.com>

No password is used for this EDX

4.5 Job History

The Job history page allows you to view how the jobs have been executed.

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Select the *job* you would like to view the history for and how may entries you would like to see, alternatively you can us **Search** by date. Then **click Fetch History**. And you will see the screen below.

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The screenshot shows the QlikView Publisher 8.0.0 Enterprise Edition web interface. The browser window title is "QlikView Publisher Version 8.0.0 Enterprise Edition - Windows Internet Explorer". The address bar shows "http://localhost/ControlPanel/Diagnostic/History.aspx". The page title is "QlikView Publisher". The navigation menu includes "Home", "Diagnostics", and "Settings". The "Diagnostics" section is expanded to show "Job History".

The "Job History" page displays search options and a table of job executions. The search options include "Check all", "Uncheck all", "Region Responsible" (checked), "EDX Triggered Job", "Max entries/Job" (set to 10), and "Use Date Search".

Job Name	Total Executions	Successful Executions	Shortest Execution	Longest Execution
Region Responsible	4	4	45s	56s

The "Region Responsible" job is expanded to show a table of executions:

Started At	Finished At	Result	View Log
2007-05-17 16:02:00	2007-05-17 16:02:45	Finished	View Log

The execution is further expanded to show a table of tasks:

Task	Type	Started At	Finished At	Result	Abort Reason	View Log
ReloadForCustomTe		2007-05-17 16:02:00	2007-05-17 16:02:25	Finished		View Log
Distribution CustomUsers		2007-05-17 16:02:25	2007-05-17 16:02:45	Finished		View Log

Below the tasks table, there are three more rows of job executions:

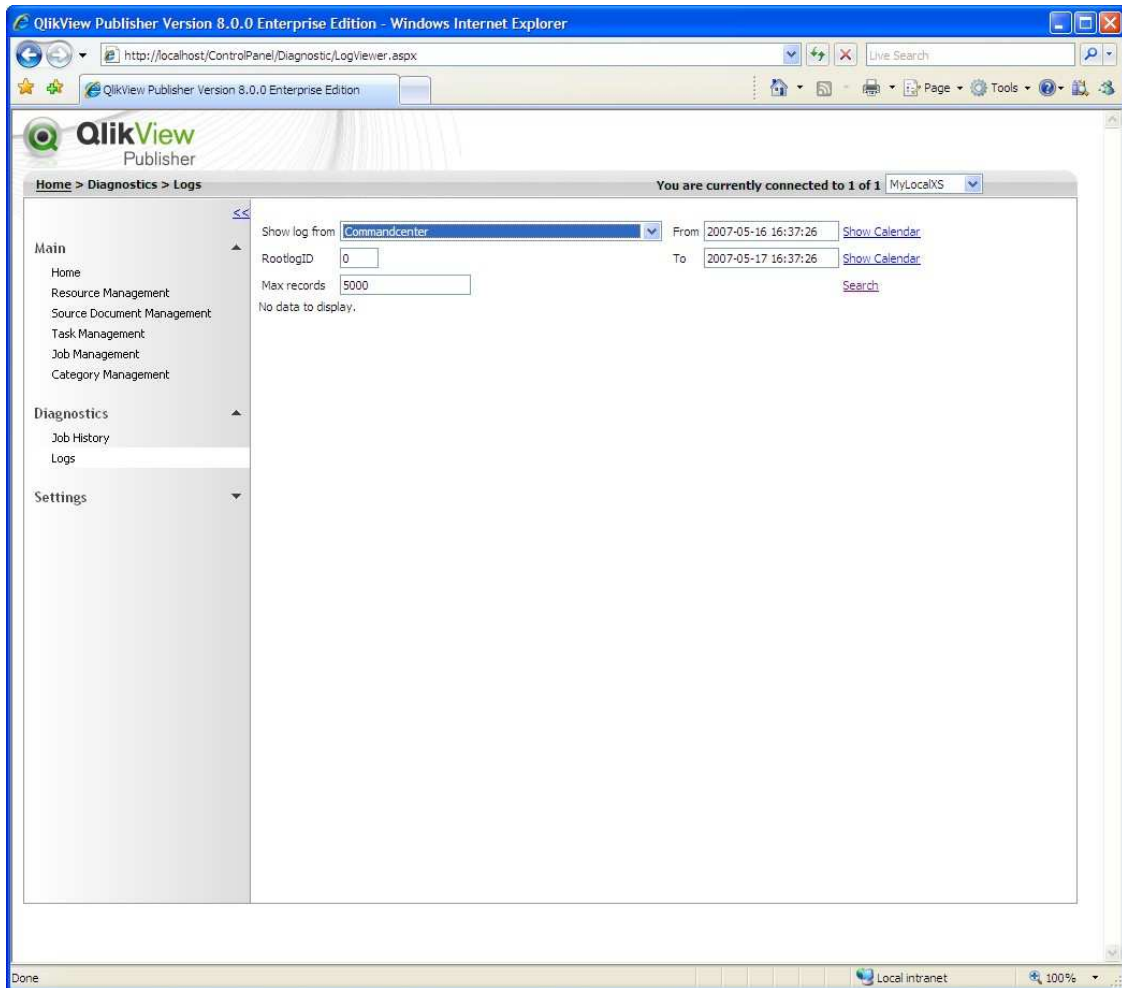
2007-05-17 15:07:23	2007-05-17 15:08:08	Finished	View Log
2007-05-17 15:02:00	2007-05-17 15:02:45	Finished	View Log
2007-05-17 14:02:00	2007-05-17 14:02:57	Finished	View Log

You can expand and collapse the different executions or go directly to each *task* that is a part of that job. You can also jump to the log files for this given execution with the link View Log.

4.6 Logs

The Logs page allows you to view the log files from either the *Command Center* or the *XS*.

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If you have warnings or errors in the log these are displayed in yellow and red. Collapsing a node will show if any errors or warnings are present.

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QlikView Publisher Version 8.0.0 Enterprise Edition - Windows Internet Explorer

http://localhost/ControlPanel/Diagnostic/LogViewer.aspx

QlikView Publisher Version 8.0.0 Enterprise Edition

Home > Diagnostics > Logs

You are currently connected to 1 of 1 MyLocalXS

Show log from MyLocalXS - http://localhost:8082/qvts.aspx From 2007-05-16 16:54:44 Show Calendar

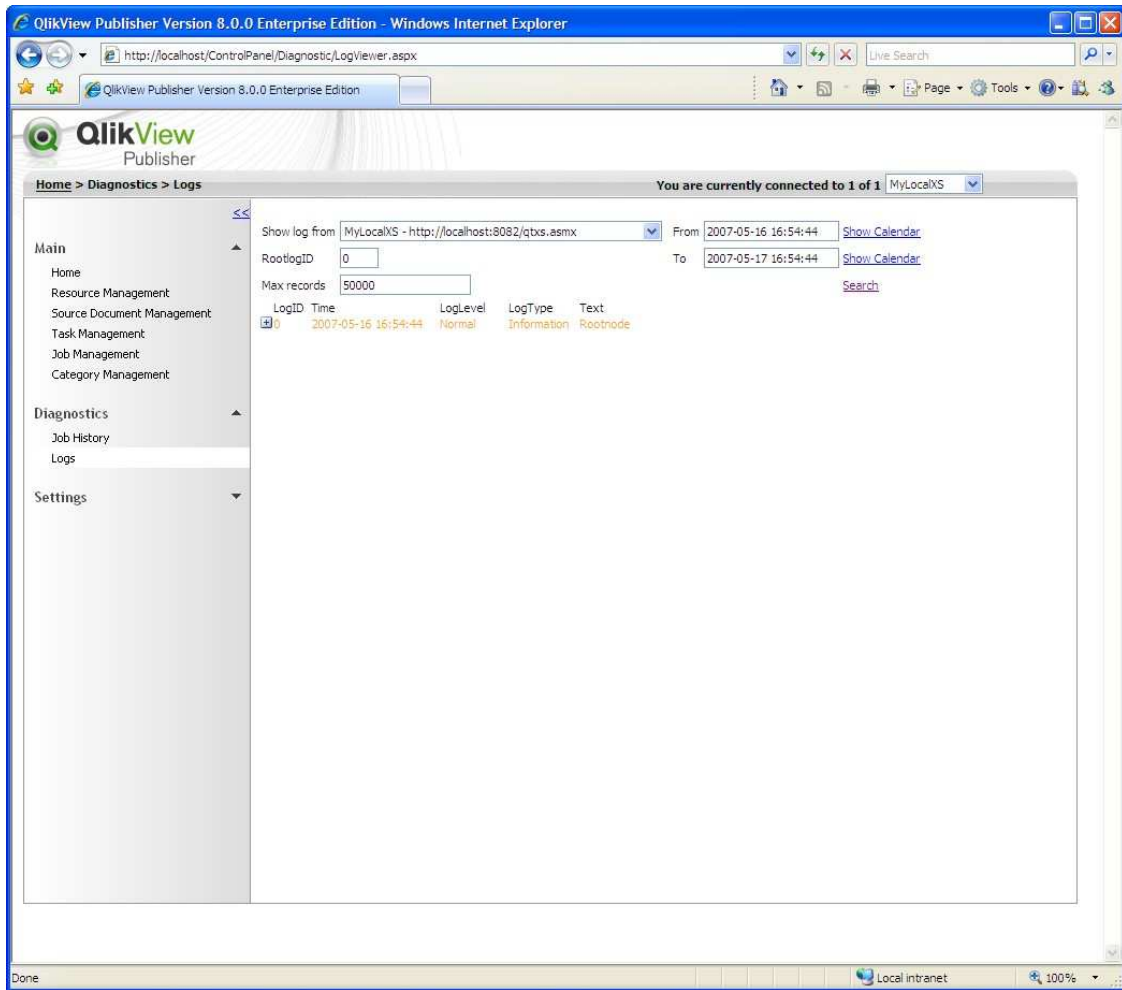
RootlogID 0 To 2007-05-17 16:54:44 Show Calendar

Max records 50000 Search

LogID	Time	LogLevel	LogType	Text
0	2007-05-16 16:54:44	Normal	Information	Rootnode
839712	2007-05-16 17:31:17	Normal	Information	Initializing QlikView Publisher... Please wait
839727	2007-05-16 17:31:18	Normal	Information	Creating/Patching database...
839728	2007-05-16 17:31:18	Normal	Information	Patching complete. Table list: DDLExecuteStatus, DDLLeapNumber, DDLMaxLeapNumber
839731	2007-05-16 17:31:18	Normal	Information	Initializing ThreadPool
839730	2007-05-16 17:31:18	Normal	Information	Initializing ObjectPool
839736	2007-05-16 17:31:18	Normal	Information	Initializing XInfo
839737	2007-05-16 17:31:18	Normal	Information	Initializing SessionList
839738	2007-05-16 17:31:18	Normal	Information	Initializing Workorder/Rotator
839739	2007-05-16 17:31:18	Normal	Information	Initializing JobQueueList
839740	2007-05-16 17:31:18	Normal	Information	Initializing DSCHelper
839747	2007-05-16 17:31:18	Normal	Information	Max Simultaneous QlikView Engines set to: 2
839748	2007-05-16 17:31:18	Normal	Information	Max Simultaneous Reader QlikView Engines set to: 2
839768	2007-05-16 17:31:28	Normal	Information	Max Simultaneous QlikView Engines set to: 4
839769	2007-05-16 17:31:28	Normal	Information	Max Simultaneous Reader QlikView Engines set to: 4
839774	2007-05-16 17:31:28	Normal	Information	Loading plugin from file: C:\Program Files\QlikView\Publisher\ExecutionService\PluginFolder\WTFSPFileSystemHandler.dll
839788	2007-05-16 17:31:32	Normal	Information	Creating backup of previous workorder
839790	2007-05-16 17:31:32	Normal	Information	There are no jobs waiting for execution
839791	2007-05-16 17:31:32	Normal	Information	New workorder applied. Time=268 ms
840011	2007-05-16 17:59:48	Normal	Information	Creating backup of previous workorder
840013	2007-05-16 17:59:48	Normal	Information	There are no jobs waiting for execution
840014	2007-05-16 17:59:48	Normal	Information	New workorder applied. Time=242 ms
840028	2007-05-16 18:01:09	Normal	Information	Creating backup of previous workorder
840030	2007-05-16 18:01:09	Normal	Information	There are no jobs waiting for execution
840031	2007-05-16 18:01:09	Normal	Information	New workorder applied. Time=202 ms
840063	2007-05-16 18:04:20	Normal	Information	Creating new session for document=C:\QlikView Publisher Data\Private Data\Source Documents\In Production\DynamicDistribution.qvw
840100	2007-05-16 18:05:00	Normal	Information	Creating backup of previous workorder
840102	2007-05-16 18:05:06	Normal	Information	Job at queue ticket 1 are Region Responsible (53011c80-2449-463b-bbdc-a3b6f906146d) to be started at 2007-05-16 19:02:00
840103	2007-05-16 18:05:06	Normal	Information	New workorder applied. Time=6417 ms
840115	2007-05-16 18:05:57	Normal	Information	Creating backup of previous workorder
840117	2007-05-16 18:05:57	Normal	Information	Job at queue ticket 1 are Region Responsible (53011c80-2449-463b-bbdc-a3b6f906146d) to be started at 2007-05-16 19:02:00
840118	2007-05-16 18:05:57	Normal	Information	Job at queue ticket 2 are EDX Triggered Job (037ecfe5-b831-4555-8338-23b883a06326) to be started at 2007-05-16 19:05:00
840119	2007-05-16 18:05:57	Normal	Information	New workorder applied. Time=434 ms
840136	2007-05-16 18:07:27	Normal	Information	XSGroupDebugNode: Lock(): Accuring->Lock; Success. ID=7627f8d9-f94b-81f4-abe2-47af6eee907b
840137	2007-05-16 18:07:27	Normal	Information	**** JobQueueItem was successfully locked; Owner ID=7627f8d9-f94b-81f4-abe2-

Done Local intranet 100%

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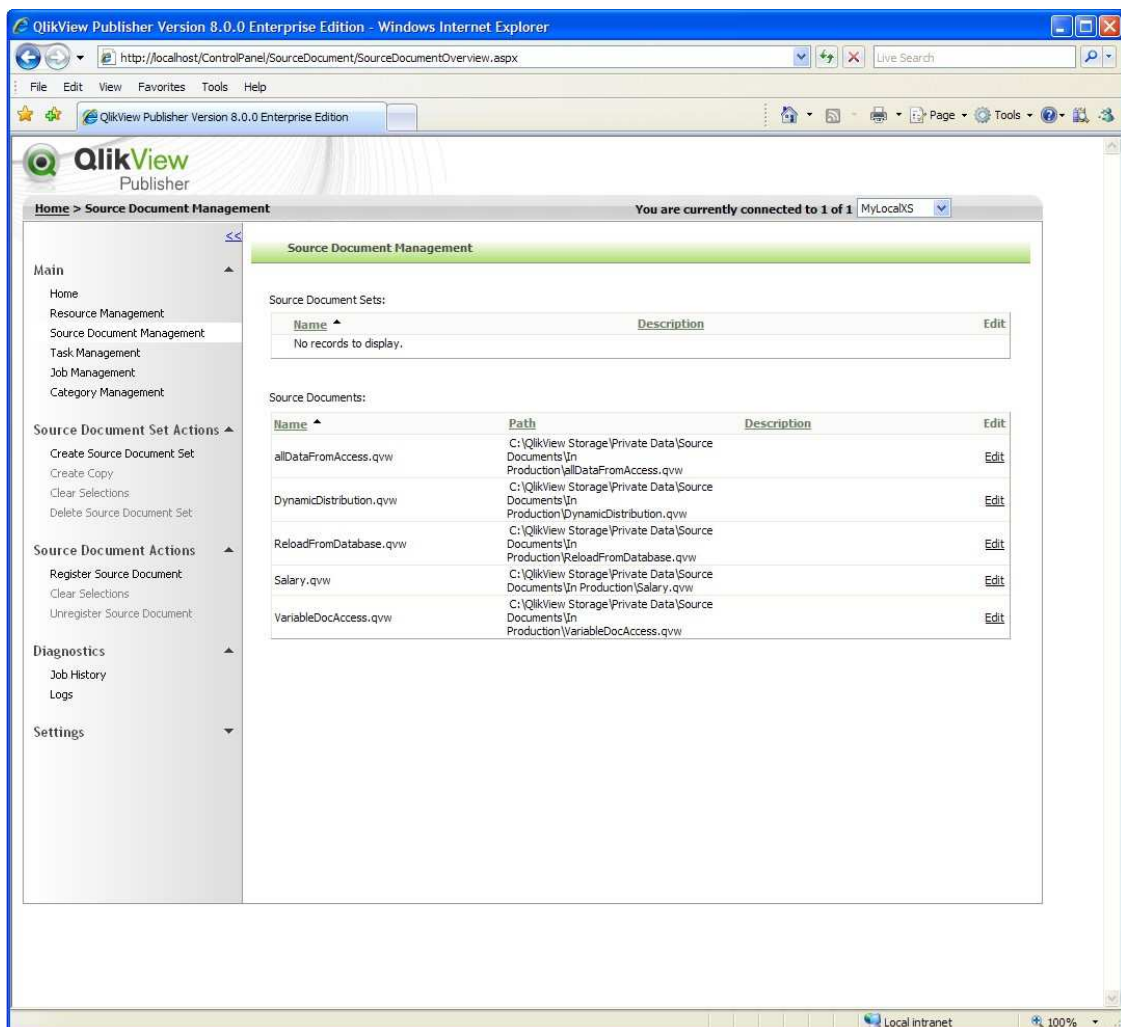


4.6.1 Available options and settings

- **Show log from:** Here you select Command Center or which XS you want to view the log from.
- **RootlogID:** If you want to start viewing the log from a given place use the ID of that node. If you select 0 the entire the log will be displayed.
- **Max records:** This is the max number of log nodes that will be displayed. Please note that if the number of nodes here is too low to be able to show a complete sub node and all of its children that entire sub node will not be displayed.

4.7 Source Document Management

Source Document Management lets the administrator create and administer *Source Documents* and *Source Document Sets*. A *Source Document Set* is a collection of *Source Documents* used for reloading.

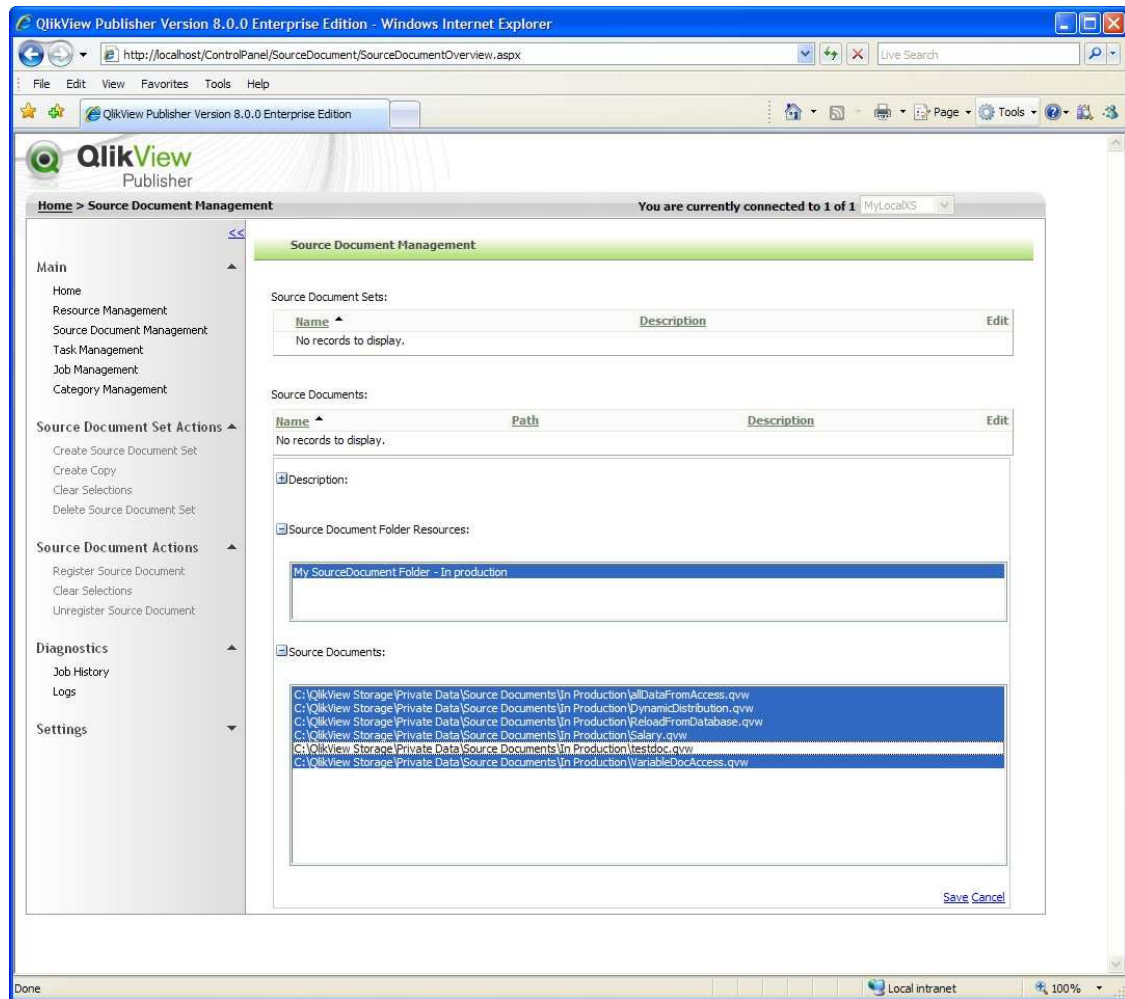


4.7.1 Available options and settings

- **Edit.** Opens the currently selected item for editing.

4.7.2 To register new Source Documents

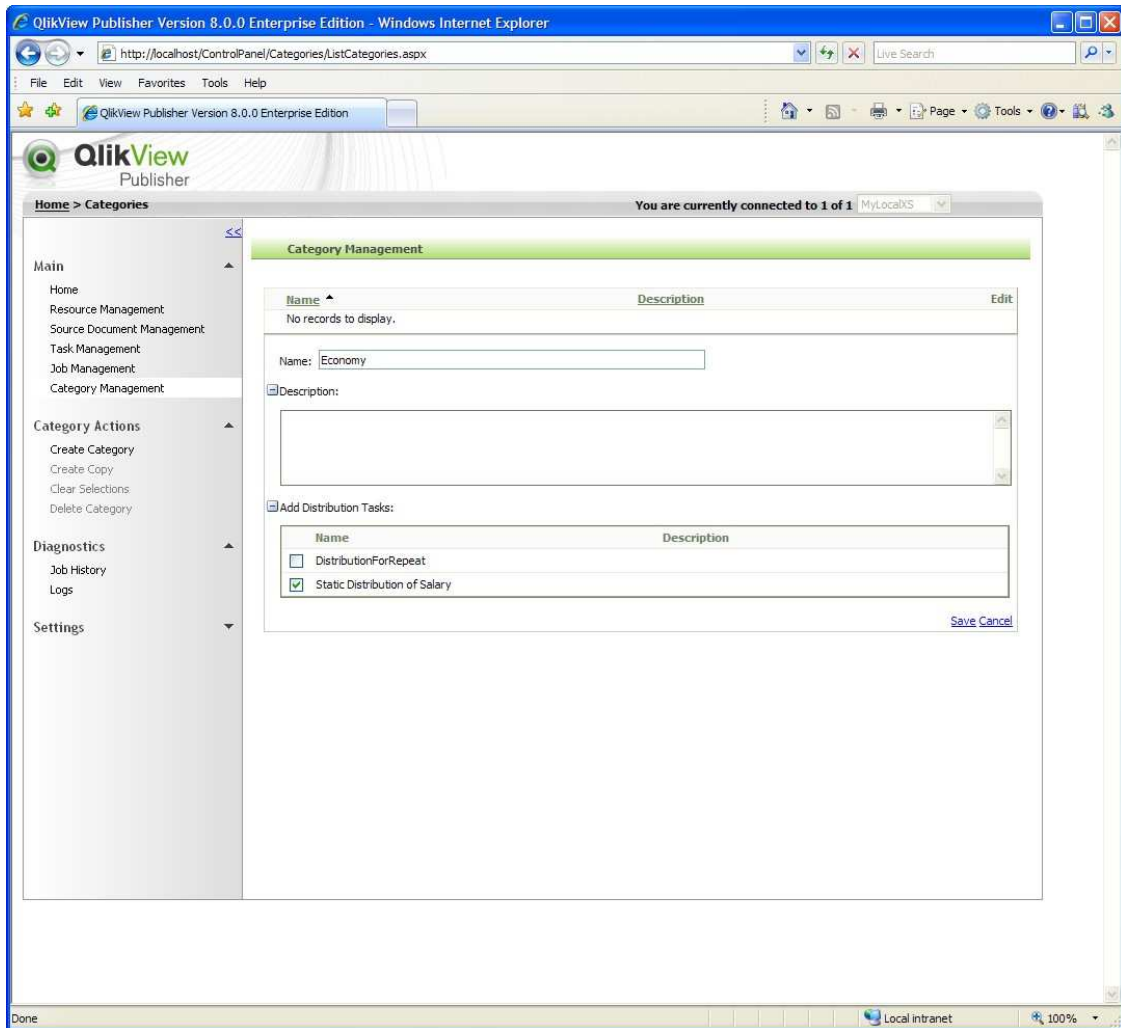
Click Register *Source Document* to the left. The screen below shows how you can register one or many source documents. Use Ctrl and Shift to select multiple *Source Documents* at once. A given *Source Document* can only be registered once for a given XS.



4.8 Category Management

Category Management lets the administrator create, edit and delete *Categories*. A *Category* bundles *Distributed Documents* in containers to make categorization easier for the end user. *Categories* are only visible to the end-user in an *AccessPoint*.

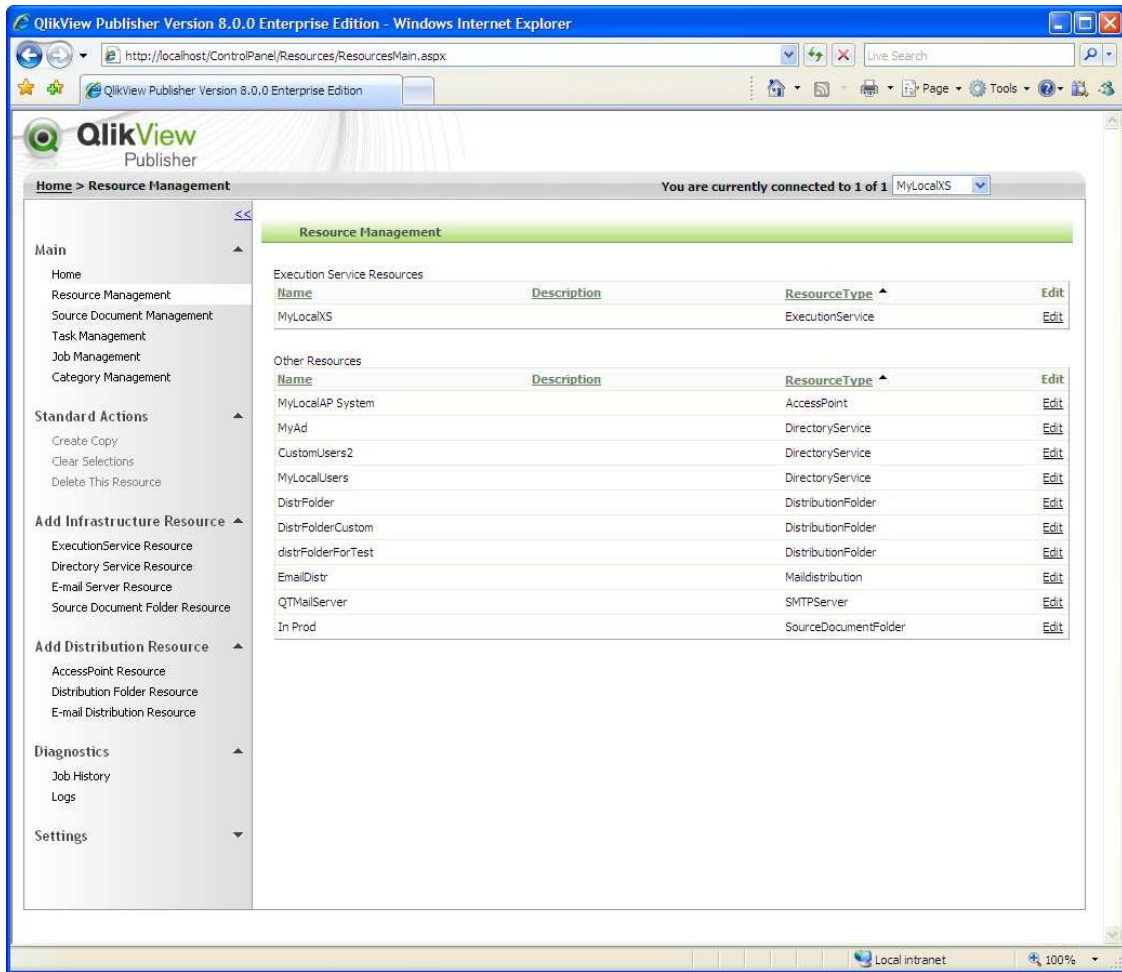
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4.9 Resources

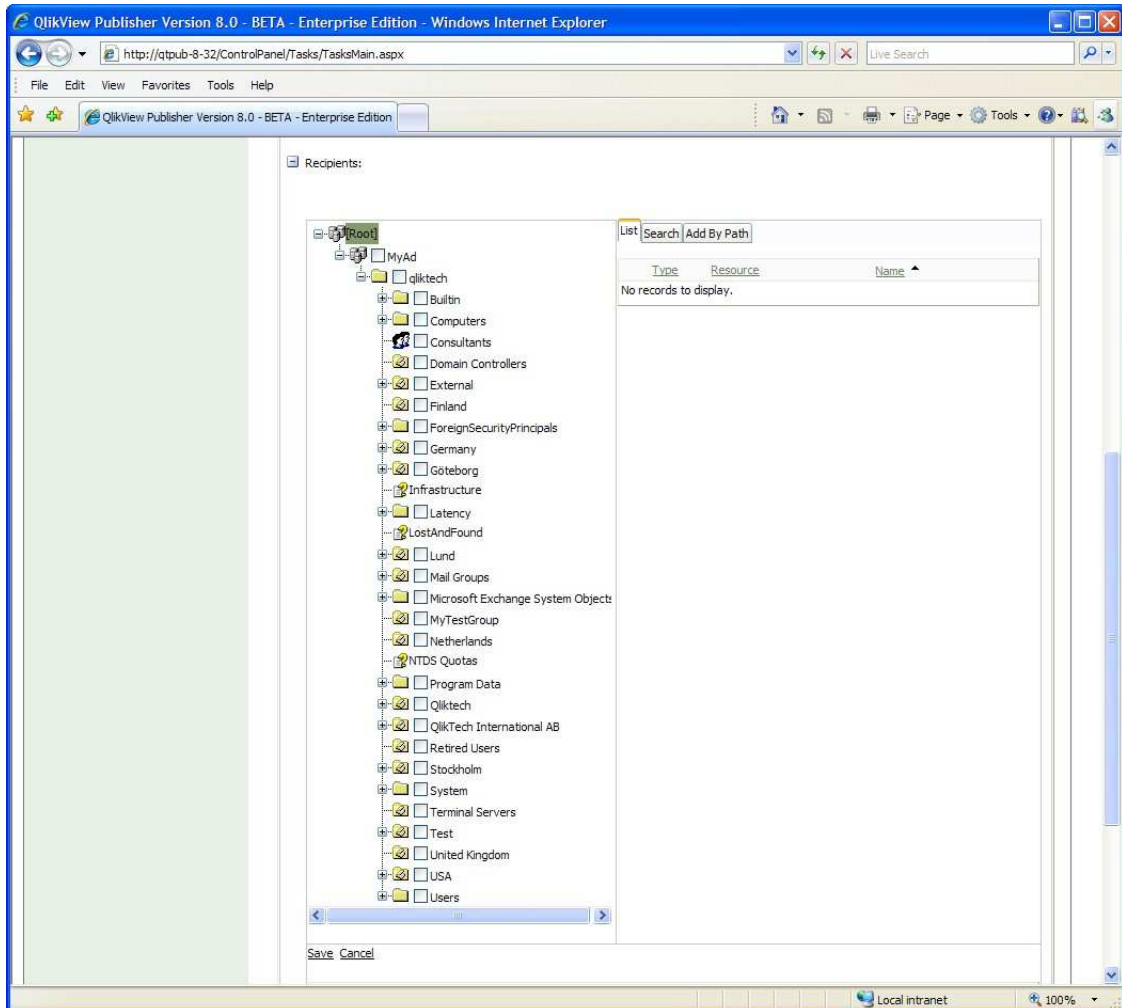
A resource is a component that provides a service and is available over time. Resources are registered and re-used within QlikView Publisher 8. There are two different types of resources; *Infrastructure resources* and *Distribution resources*. *Infrastructure resources* include *XS resources*, *Directory Service resources*, *E-mail Server resources* and *Source Document Folder resources*. *Distribution resources* include *AccessPoint resources*, *Distribution Folder resources* and *E-mail Distribution resources*.

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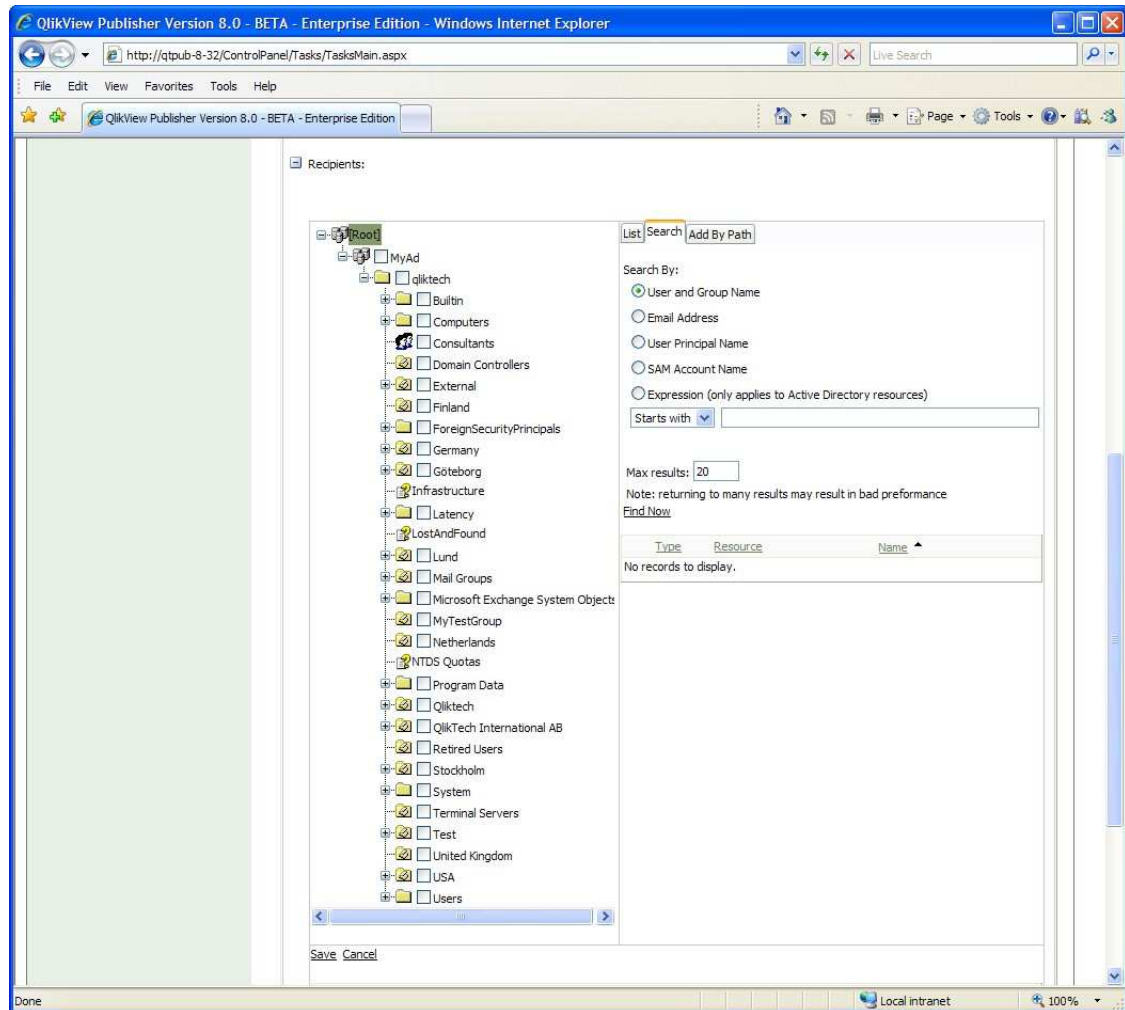
4.9.1 Recipient Control

The Recipient control is how you select recipients in Publisher 8. The recipient control allows you to browse *Directory Services*. The Recipient Control has three ways for you to select recipients: List, Search, Add By Path.



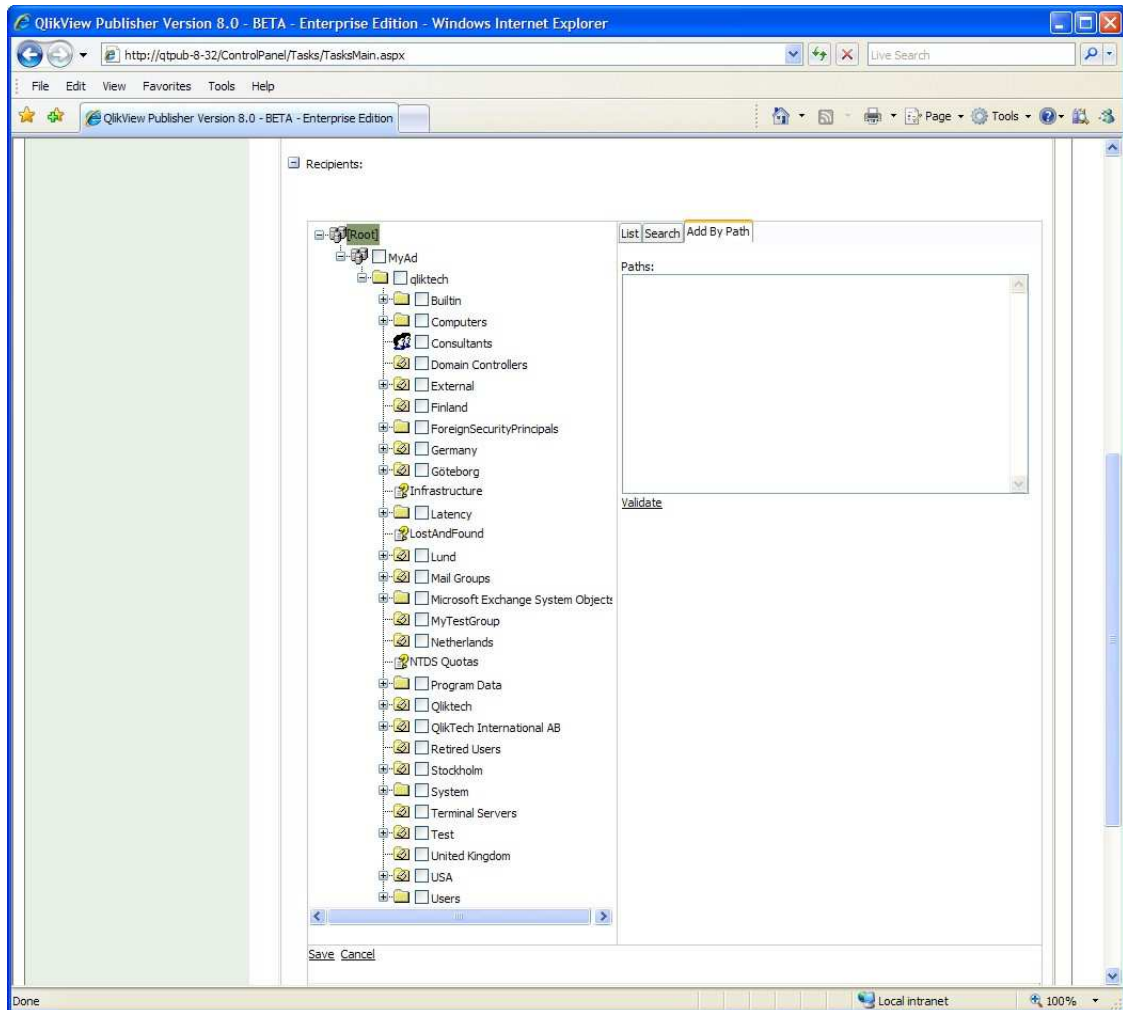
Using the **List** tab allows you to browse the Directory service tree and select your *recipients*.

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Using the **Search** tab you can search in the Directory Service. The search will be started in the node you select in the tree. You can search for User and Group name, Email address, User Principal Name and SAM account name. If you use Active Directory you can build an expression to search for.

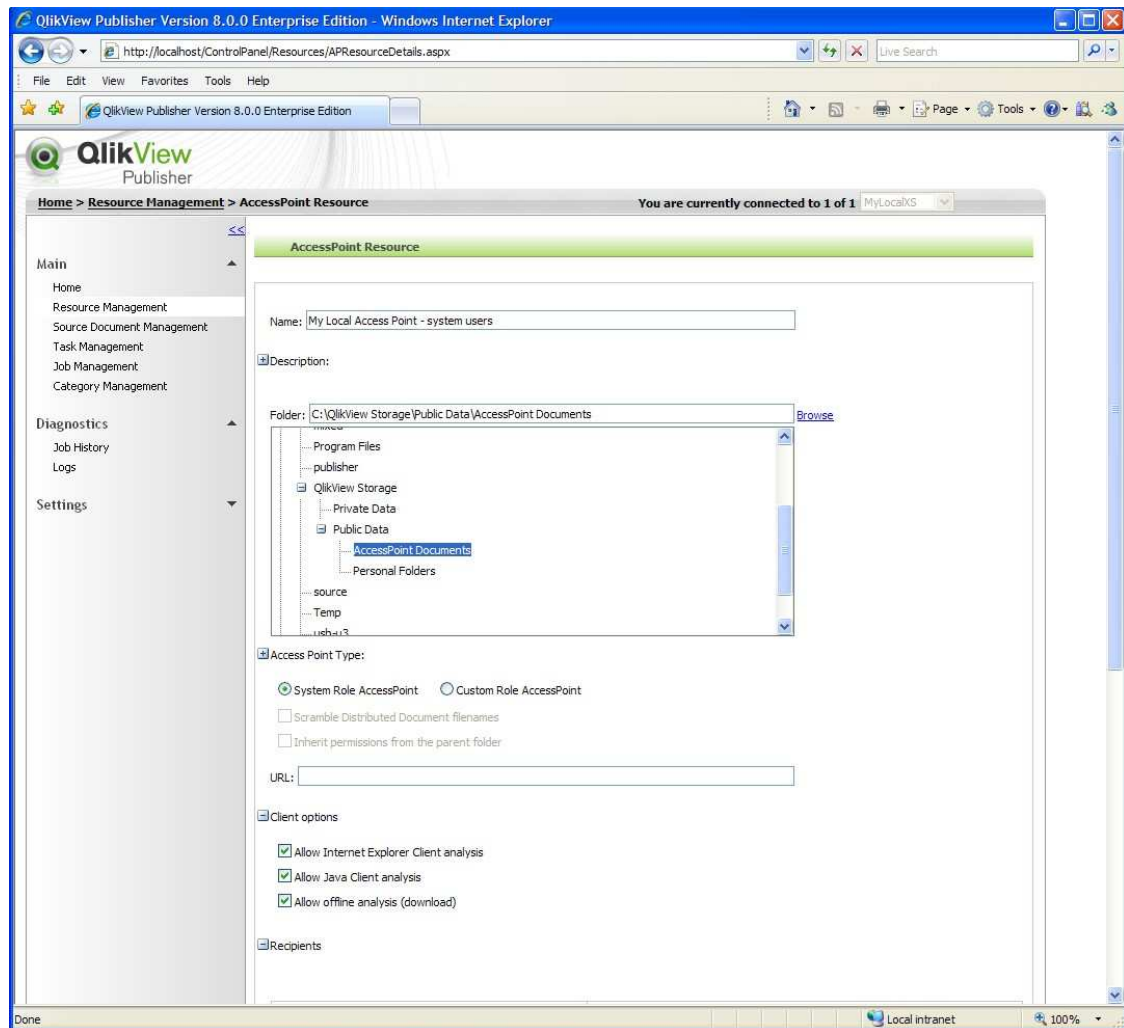
QlikView Publisher 8 Reference Manual



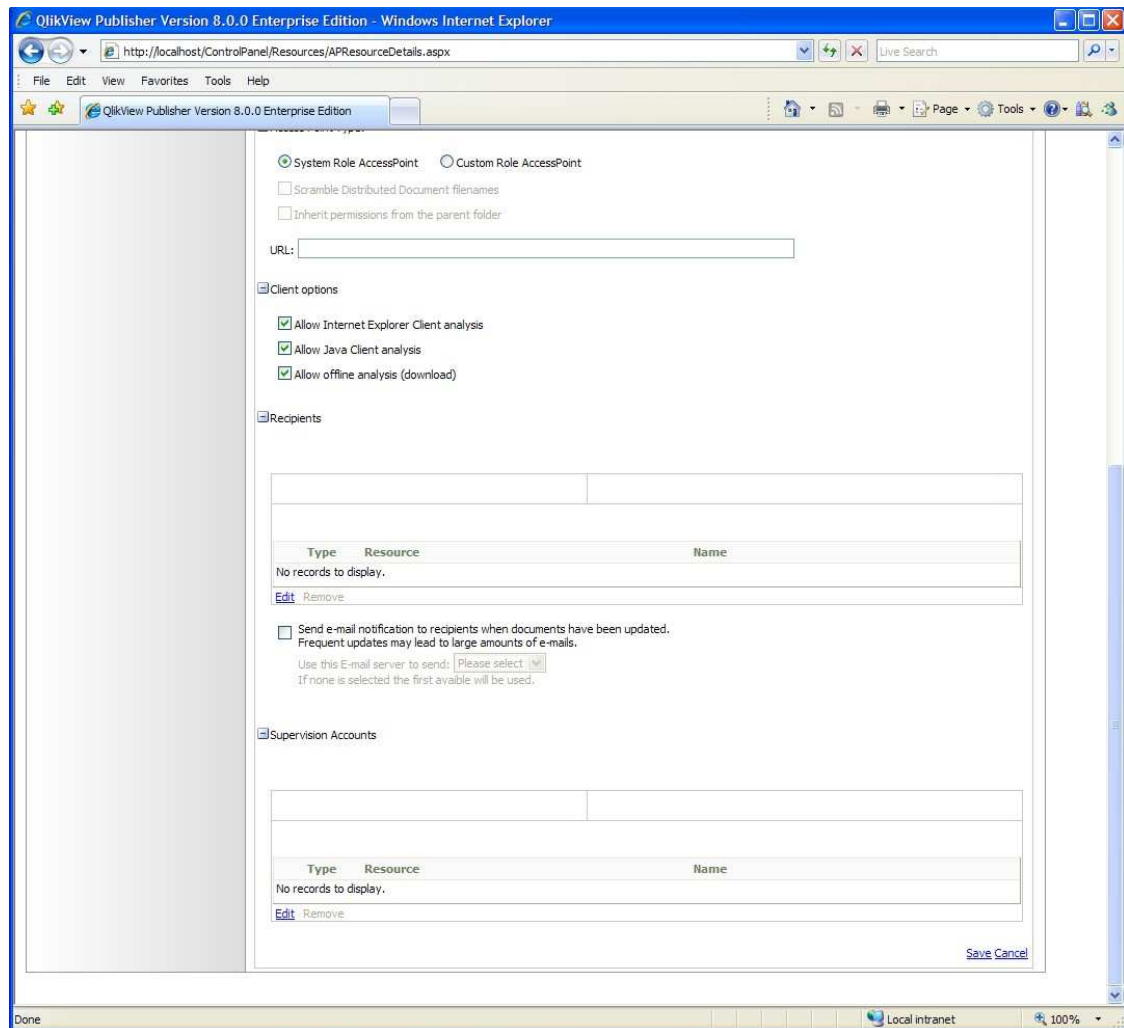
Using the **Add By Path** tab, you can enter the LDAP string for the users you want to add. If you want to add more than one recipient at a time press Enter between each recipient. The link **Validate** checks that you have entered a correct string and that the recipients have been found.

4.9.2 AccessPoint resources

An *AccessPoint* is a secure, web-based end user interface for *Distributed Documents*. A user is authenticated and authorized upon login and is presented with the documents he or she has access to.



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An *AccessPoint* can display files other than the ones distributed through QlikView Publisher. If a file is placed in the Folder location it will be displayed to any user who has permissions to view the file.

4.9.2.1 Available options and settings

- **Name.** The name that identifies the resource.
- **Description.** A descriptive text of the resource.
- **Folder.** The folder that the resource displays documents from.
- **AccessPoint type.** System Role AccessPoint or Custom Role AccessPoint. Determines which type of users will be able to access the *AccessPoint*.
 - **Scramble Distributed Document file names.** This setting determines if the *Distributed Document* will be saved with a plain text file name or a scrambled file name on disk.
 - **Inherit custom security from parent folder.** This option controls if documents will be distributed to the resource with individual permissions or if the residing folder permissions will be applied on the documents.

- **URL.** The URL to the resource. This setting is used by the *Control Panel* to route end-users to the resource provided that he or she has been granted access.
- **Client Options.** This setting determines which client types of analysis the resource will allow.
 - **Allow Internet Explorer Client analysis**
 - **Allow Java Client analysis**
 - **Allow offline analysis (download)**
- **Recipients.** The users and groups that will have permission to view documents on the resource. The *effective distribution permissions* on a *Distributed Document* are a combination of this setting and the recipients assigned to the *Distributed Document*.
- **Supervision Accounts.** Accounts that will have supervisory access to the resource.

NOTE: When installing *AccessPoint* in order to make use of a *QlikView Server*, please make sure that the QlikView Server file plugin.asp does not allow anonymous access. The file plugin.asp is located in the virtual folder QVPlugin on the web server.

4.9.2.2 Configurations of the AccessPoint

There are two files that are used to configure the *AccessPoint*, web.config and settings.xml. Web.config is located in C:\Program Files\QlikView\Publisher\AccessPoint, and settings .xml is located in C:\Documents and Settings\All Users\Application Data\QlikTech\Publisher\AccesspointService.

Web.config:

```
<configuration>
  <appSettings>
    <add key="AccesspointBackendIP" value="localhost"/>
    <add key="AccesspointBackendPort" value="4994"/>
    <add key="PublisherResponsible" value="Publisher Responsible"/>
    <add key="PublisherResponsibleEmail"
value="publisher.responsible@email.goes.here"/>
    <add key="GetUsernameFromHeaderForCustomUsers" value="False"/>
    <add key="UserHeader" value="SM_USER"/>
    <add key="CustomRoleServiceURL"
value="http://localhost:8081/qtcc.asmx"/>
    <add key="qtcc.qtcc" value="http://localhost:8081/qtcc.asmx"/>
    <add key="ApplicationDataFolder" value=""/>

    <add key="PleaseContact" value="Please contact "/>
    <add key="IfYouAreExperiencingProblems" value=" if you are
experiencing problems with the AccessPoint or the documents published in it."/>
    <add key="YouAreLoggedInAs" value="You are logged in as: "/>
    <add key="PageLastRefreshedAt" value="Page last refreshed at: "/>
    <add key="DefaultCategory" value="Default Category"/>
    <add key="OtherFiles" value="Other Files"/>
    <add key="LastUpdate" value="Last Update"/>
    <add key="NextUpdate" value="Next Update"/>
```

```

    <add key="Analyze" value="Analyze"/>
    <add key="RefreshDocumentList" value="Refresh Document List"/>
    <add key="ClickToOpenInIETooltip" value="Click here to open in Internet
Explorer client"/>
    <add key="ClickToOpenInJavaTooltip" value="Click here to open in Java
client"/>
    <add key="ClickToOpenInDownloadTooltip" value="Click here to
download"/>
    <add key="ClickToOpenInZFPTooltip" value="Click here to open in Zero
Footprint client"/>
    <add key="LogOnToAccesspoint" value="Log on to accesspoint"/>
    <add key="Username" value="Username"/>
    <add key="Password" value="Password"/>
    <add key="Logon" value="Logon"/>
    <add key="EnterUsername" value="Enter username"/>
    <add key="EnterPassword" value="Enter password"/>
    <add key="ClickToLogon" value="Click to Logon"/>
    <add key="EnterAUserName" value="Enter a username"/>
    <add key="EnterAPassword" value="Enter a password"/>
    <add key="WrongUsernameOrPassword" value="Wrong username or
password."/>
    <add key="CouldNotValidateBecauseConnection" value="Could not
validate user because connection to Command Center failed."/>
    <add key="IllegalCharactersDetected" value="Illegal characters detected
in input."/>
    <add key="ConnectionToAccesspointServiceFailed" value="Connection
to AccessPoint service failed. Error message was:"/>
    <add key="OldPassword" value="Old Password:"/>
    <add key="NewPassword" value="New Password:"/>
    <add key="ChangePassword" value="Change Password"/>
    <add key="ConfirmNewPassword" value="Confirm New Password"/>
    <add key="EnterOldPassword" value="Enter old password"/>
    <add key="EnterNewPassword" value="Enter new password"/>
    <add key="ClickToChangePassword" value="Click to Change
Password"/>
    <add key="Cancel" value="Cancel"/>
    <add key="ChangeFailedWrongPassword" value="Password change
failed due to supplying wrong password."/>
    <add key="ChangeFailedConnectionFailed" value="Could not change
password because connection to Command Center failed."/>
    <add key="NewAndConfirmedDoesNotMatch" value="New and confirmed
password does not match."/>
    <add key="PasswordMustBeOneCharacter" value="New password must
be at least 1 character long."/>
    <add key="Unknown" value="Unknown"/>
    <add key="NoRecordsText" value="No records to display"/>
    <add key="Logoff" value="Logoff"/>
    <add key="YouHaveBeenLoggedOff" value="You have been logged off
the accesspoint."/>
    <add key="ClickToLogOn" value="Click here to log on again."/>

```

- `</appSettings>`
- `AccesspointBackendIP` = Configures the address to the backend. If you change this you also need to change in the backend so that it responds at this address.
- `AccesspointBackendPort` = Which port the backend listens to.
- `PublisherResponsible` = The name that will be displayed at the bottom of the page.
- `PublisherResponsibleEmail` = The email of the publisher responsible.
- `GetUsernameFromHeaderForCustomUsers` = The username of custom users shall be read from a given http header. If it is not found you are redirected to `login.aspx`.
- `GetUsernameFromHeaderForWindowsUsers` = The username of system users shall be read from a given http header. If it is not found Windows Authenticated user will be used.
- `UserHeader` = Which http header should be used.
- `CustomRoleServiceURL` = URL for the custom user web service on the command center. This is used for logging in and for changing password for custom users.

Settings.xml:

```
<?xml version="1.0" encoding="utf-16"?>
<Settings>
  <ClientSettings>
    <Listing StartExpanded="True" />
    <PluginWindow OpenMode="AlwaysInNew"
      DisplayFileNameInTitleBar="True" UseQvpLinksForPlugin="True" />
    <Communication ReceiveTimeout="20000" SendTimeout="5000" />
  </ClientSettings>
  <ServerSettings>
    <Listener IPAddress="127.0.0.1" Port="4994" />
    <Scanner IncludeOtherFiles="False" />
    <Directories />
    <QlikviewServers>
      <AddQvs Machine="192.168.0.131" LinkMachineName="MJNX64"
        ReadSettingsFromRegistry="True" AlwaysUseFallbackKey="False"
        RegistryBaseKey="HKEY_LOCAL_MACHINE\SOFTWARE\QlikTech\QlikViewServer\Settings 7"
        FallbackRegistryBaseKey="HKEY_LOCAL_MACHINE\SOFTWARE\Wow6432Node\QlikTech\QlikViewServer\Settings 7" />
    </QlikviewServers>
  </ServerSettings>
</Settings>
```

- Listing StartExpanded. Determines whether categories should be expanded or collapsed when you enter the *AccessPoint*.
- PluginWindow OpenMode. Determines in which browser window the Plug-in and Java clients will be opened.
 - Root = Uses the browser window of the *AccessPoint*
 - Same = Uses a new browser window for the first file and then continues to use this window. This means that you can only have one *QlikView* file open at the same time.
 - AlwaysInNew = Always uses a new browser window. This means that you can open several *QlikView* files at the same time.
- DisplayFileNameInTitleBar. Determines if the filename of the QVW file will be shown in the Internet Explorer title bar.
- UseQvpLinksForPlugin. This switches the link from a http to a QVP (QlikViewProtocol) link, enabling Open in server for a QlikView document. To do this make sure that the plug-in is NOT installed and that the .X-QVB extension is associated with the QV.exe file (a normal QlikView installation will do all this for you).
- Communication The timeout in the communication between the *AccessPoint* Frontend and Backend.
- Listener. Which interface the *AccessPoint* will listen to.
 - 127.0.0.1. Localhost This means the *AccessPoint* will only connect to a Front-end on the same machine. This is the default value.
 - 192.168.0.3. A specific IP address. This means that the *AccessPoint* will only connect to a Front-end with this IP number and no other.
 - 0.0.0.0. Any IP number. This means that the *AccessPoint* will connect to a Frontend on any IP address.
- Scanner. Determines if other files than *QlikView* files will be shown in the *AccessPoint*, the only option that will be available for them is **Download**. These files will be put in a Category called Other Files.
- Directories. To add or remove folders
 - <AddDirectory Path="c:\QlickViewDocuments"> This will include the files in the directory in the *AccessPoint*. The files will only be shown as **Download**, unless the *QlikView Server* also has this directory setup, in which case Plug-in and Java will be enabled.
 - <DenyDirectory Path="c:\QlickViewDocuments">. This will exclude the directory and all subfolders. DenyDirectory has higher priority than AddDirectory, this means if you use both AddDirectory and DenyDirectory on the same folder the files from that folder will not be visible.
- AddQvs. Settings for the QlikView Server used.
 - Machine. IP or name of the QlikView Server. This is the information that the *AccessPoint* Service will use to connect.

- `LinkMachineName`. This is the information that will be used for the links in the *AccessPoint*.
- `ReadSettingsFromRegistry`. Settings will be read from the registry of this machine. If it is set to `False`, this *QlikView Server* will be ignored.
- `AlwaysUseFallbackKey`. There are two places in the registry where the *QlikView Server* can write information on a 64 bit version depending on if you run it in 32 bit mode or not. By default the *AccessPoint* will try the `RegistryBaseKey` and if no values are found there it will try to use the `FallbackRegistryBaseKey`. The `AlwaysUseFallbackKey` value forces the *AccessPoint* to only use the `FallBackKey` value.
- `RegistryBaseKey`. This is where the *QlikView Server* normally stores its settings.
- `FallbackRegistryBaseKey`. This is the alternative position for the *QlikView Server* to store its settings.

After any changes to this file you need to restart the *AccessPoint Service*.

4.9.2.3 Linking to existing Ajax Zero FootPrint pages

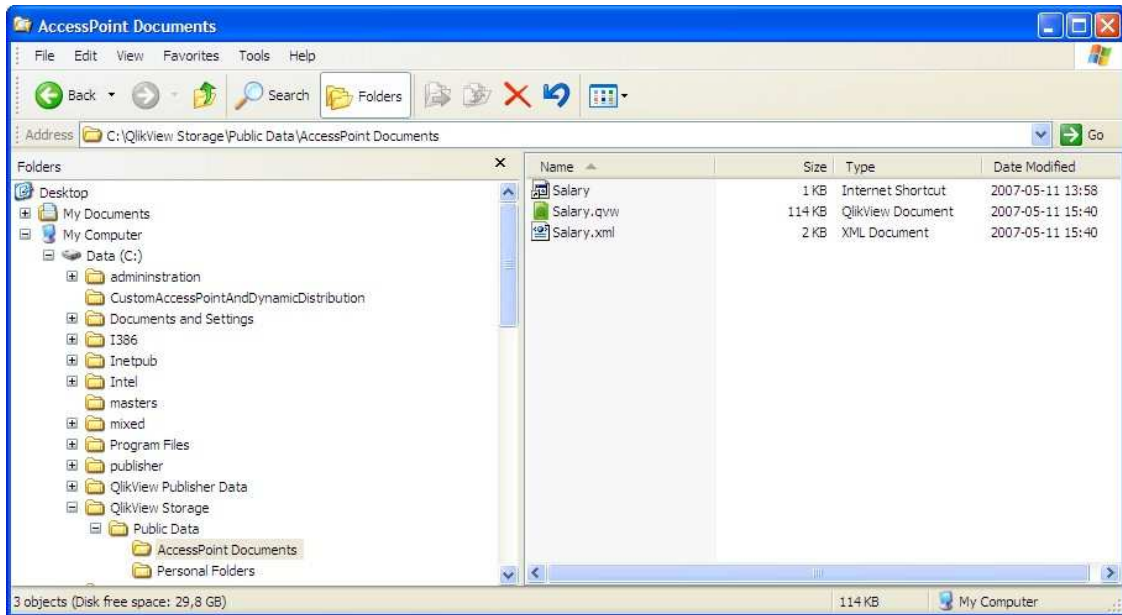
To create a link to an already existing Zero FootPrint page, create a file with the same name as the file that you want the link to appear as but with the file extension `.url`.

The file should contain

`URL=` and the link to the ZFP file

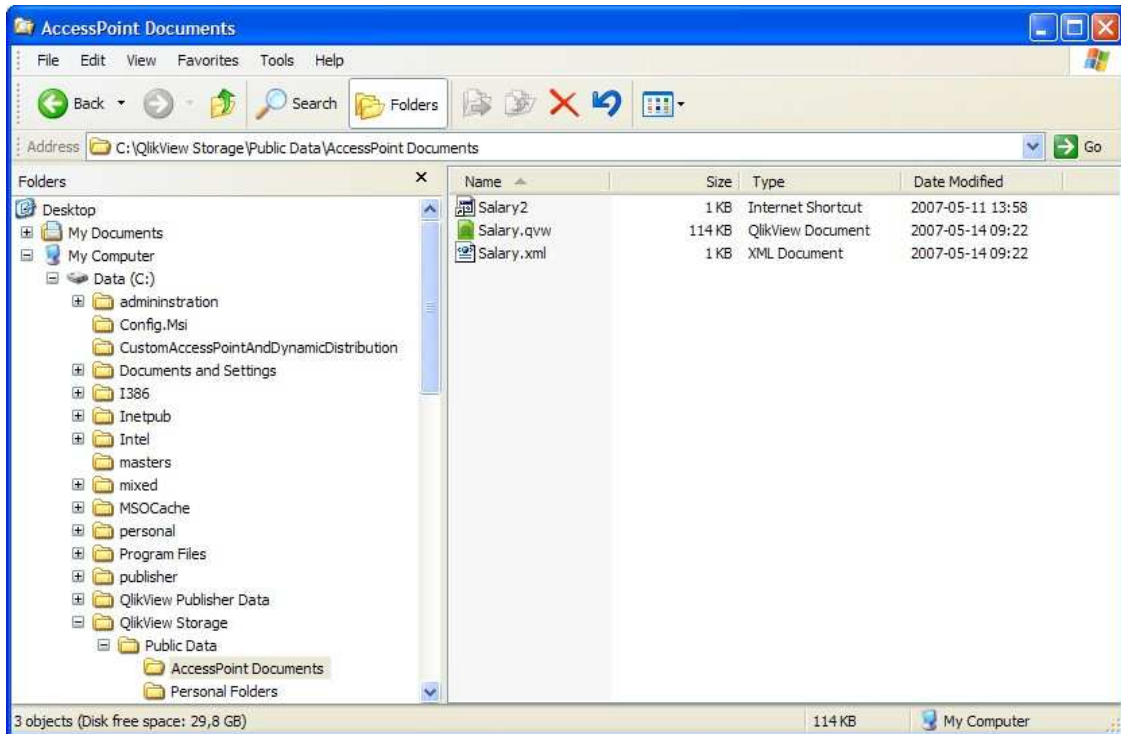


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Make sure that the name is identical with the name of the QVW file that you want it to relate to, if not the link will end up as a link on a different row.





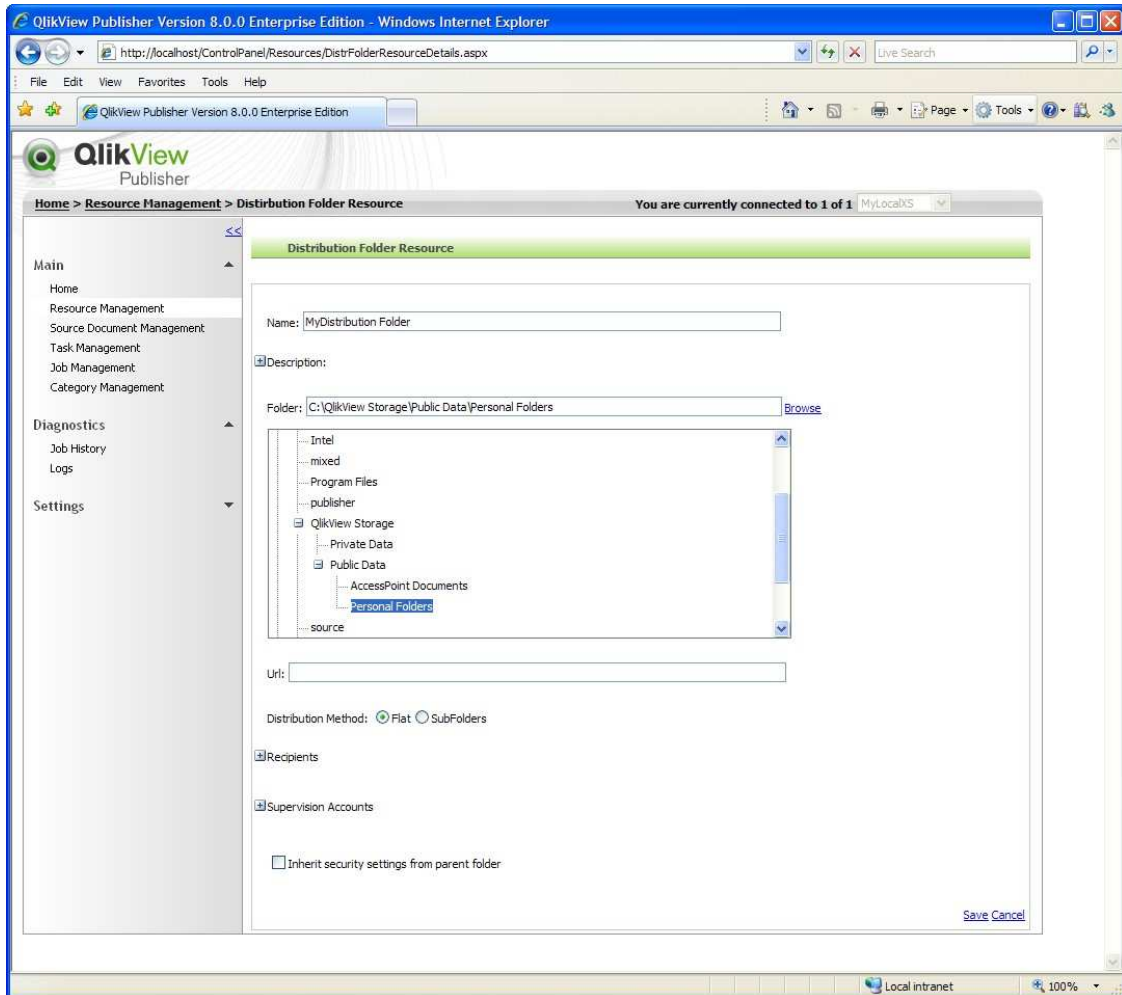
4.9.2.4 AccessPoint management of files and file security

When you start the *AccessPoint* service it will scan the selected directories and check the file security on the files. After the first scan the file scan will occur every 30 minutes or when the content of the folder changes. If you have many files in the folders for the *AccessPoint* scanning can take a few minutes. When users log in to the *AccessPoint* their credentials are compared to the directory service you are using. For QlikView Publisher 8.0 please note that the DSC will NOT work with the *AccessPoint*.

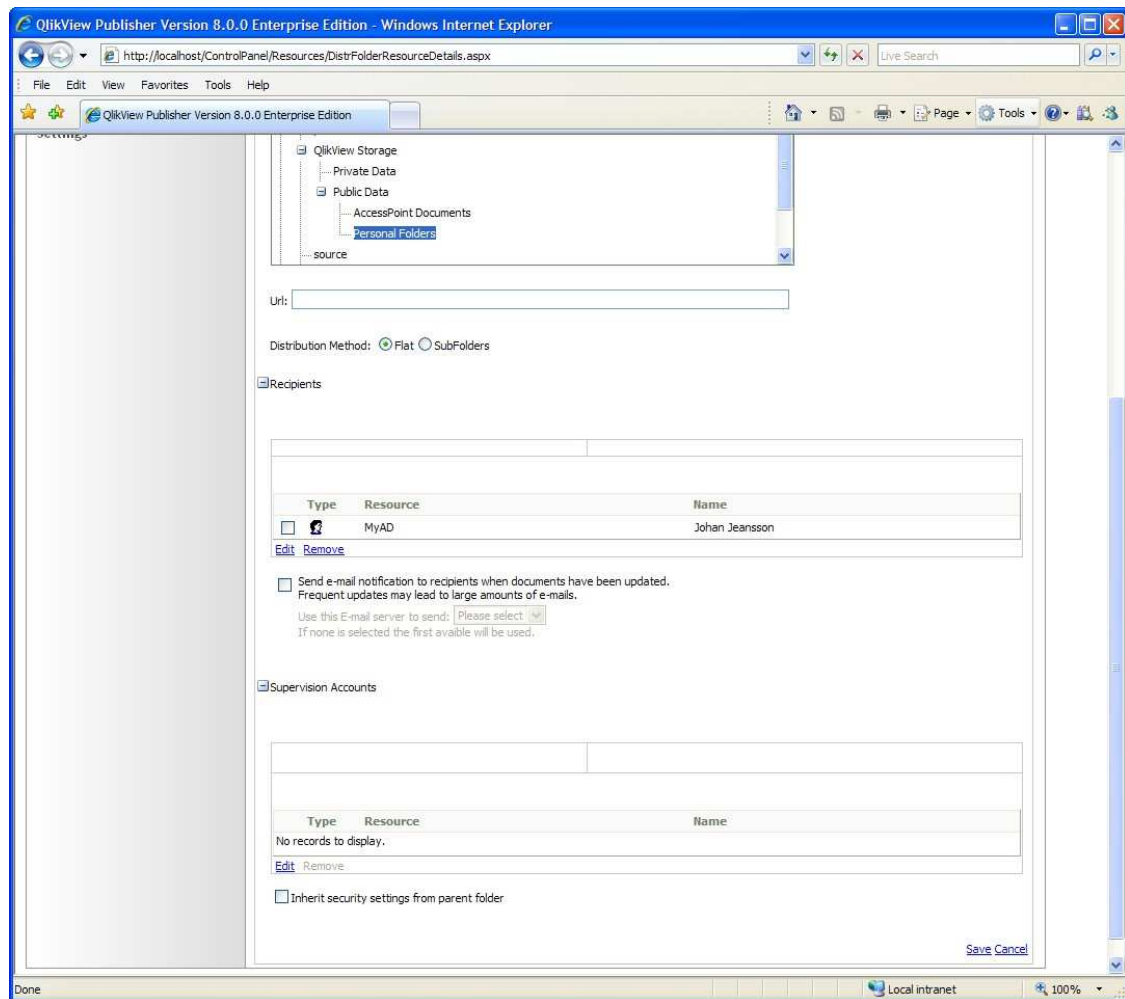
One way to further speed up the access control is to set the property `CachedSimplifiedADSecurityMode="True"`. This will make the cache store data from the directory service in the cache as well as the file access.

4.9.3 Distribution Folder resources

Distribution Folder resources are folder trees that contain individually protected folders with *Distributed Documents*. Permissions to a *Distribution Folder resource* are assigned to a user or to a group.



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4.9.3.1 Available options and settings

- **Name.** The name that identifies the resources.
- **Description.** A descriptive text of the Distribution Folder.
- **Folder.** The folder that the resource displays documents from.
- **URL.** The URL to the folder that the resource displays documents from. This is used if you send notification mail and want your recipient to have an URL to click on.
- **Distribution Method.** Flat or Subfolders. Distribution to a flat folder structure will put all documents in the same folder and distinguish them by name. Distribution to a subfolder structure will put the *Distributed Documents* in a folder structure based on recipient.
- **Recipients.** The users and groups that will have permission to view documents on the resource. The *effective distribution permissions* on a *Distributed Document* are a combination of this setting and the recipients assigned to the *Distributed Document*.

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- **Supervision Accounts.** Accounts that will have supervisory access to the resource.
- **Send Email notification.** This will send an e-mail notifying the user that the document has been updated. The URL will be included in the mail.
- **Inherit custom security from parent folder.** This option controls if documents will be distributed to the resource with individual permission or if the residing folder permissions will be enforced on the documents.

4.9.4 E-mail Server resources

- *E-mail Server resources* are used for three purposes; to distribute documents to end users, notify them of updates of their documents and to convey alerts from other resources.

The screenshot displays the QlikView Publisher 8.0.0 Enterprise Edition control panel in a Windows Internet Explorer browser. The browser's address bar shows the URL: `http://localhost/ControlPanel/Resources/SMTPResourceDetails.aspx`. The page title is "QlikView Publisher" and the breadcrumb navigation is "Home > Resource Management > E-mail Server Resource". The main content area is titled "E-mail Server Resource" and contains the following configuration fields:

- Name:** MyMailServer
- Description:** (Empty text area)
- Server Address:** mymailserver@mycompany.com
- Server Port:** 25
- E-mail Format:** Html (dropdown menu)
- From address:** (Empty text field)
- Authentication Method:**
 - Anonymous
 - Use XS Account
 - Username and Password
 - Username: (Empty text field)
 - Password: (Empty text field)
- Override E-mail:**
 - Send all e-mails to: (Empty text field)

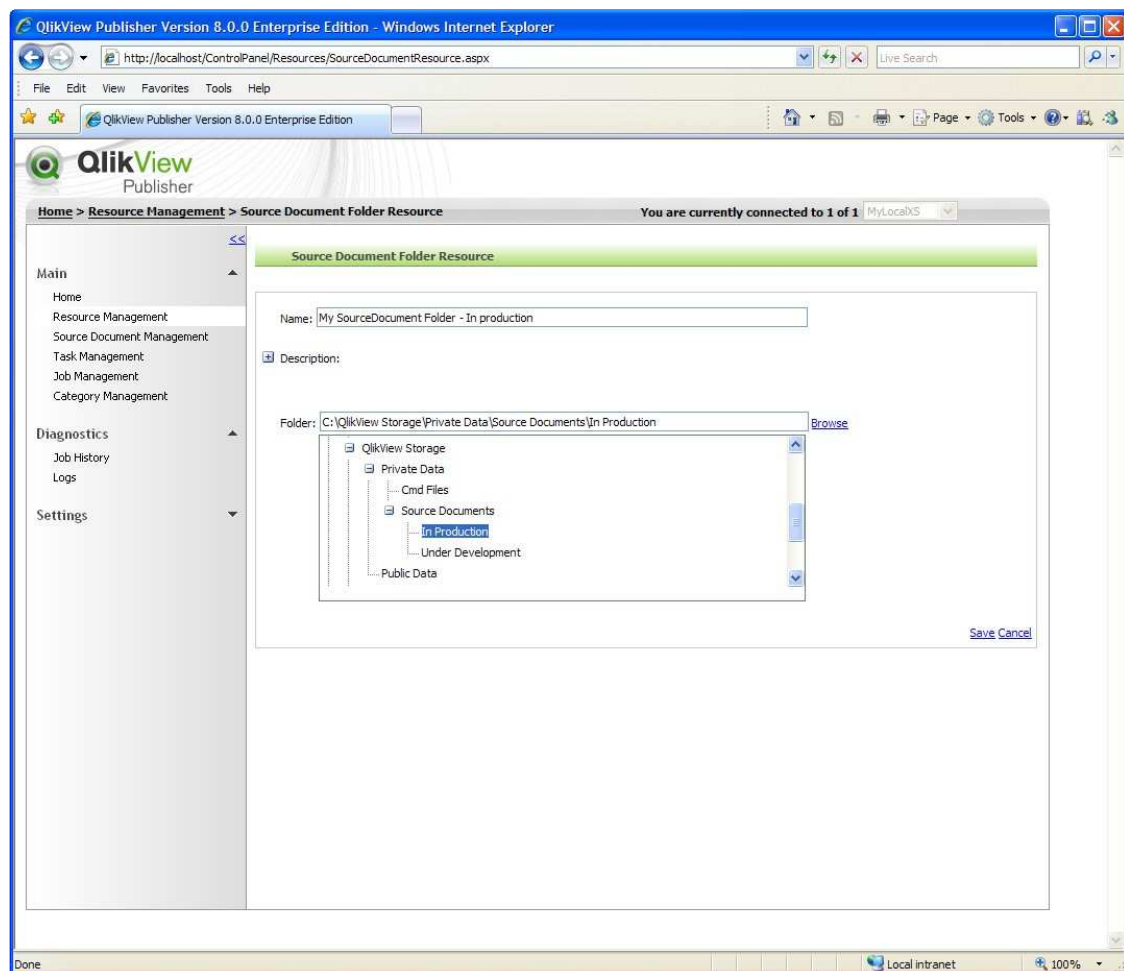
At the bottom right of the form, there are "Save" and "Cancel" buttons. The browser's status bar at the bottom indicates "Local intranet" and "100%".

4.9.4.1 Available options and settings

- **Name.** The name that identifies the resource.
- **Description.** A descriptive text of the resource.
- **Server address.** The fully qualified domain name of the e-mail server. mailserv.qliktech.com of the e-mail server.
- **Server port.** The port through which the server communicates.
- **Mail format.** Plain text or html.
- **Authentication method.** The credentials that QlikView Publisher 8 uses when it connects to the email server.
- **Override E-mail.** If defined, all e-mails from this resource will be sent to this address.

4.9.5 Source Document Folder resources

A *Source Document Folder resource* is a designated folder that contains *Source Documents*. A *Source Document* must reside within a *Source Document Folder resource* in order to be managed by QlikView Publisher.



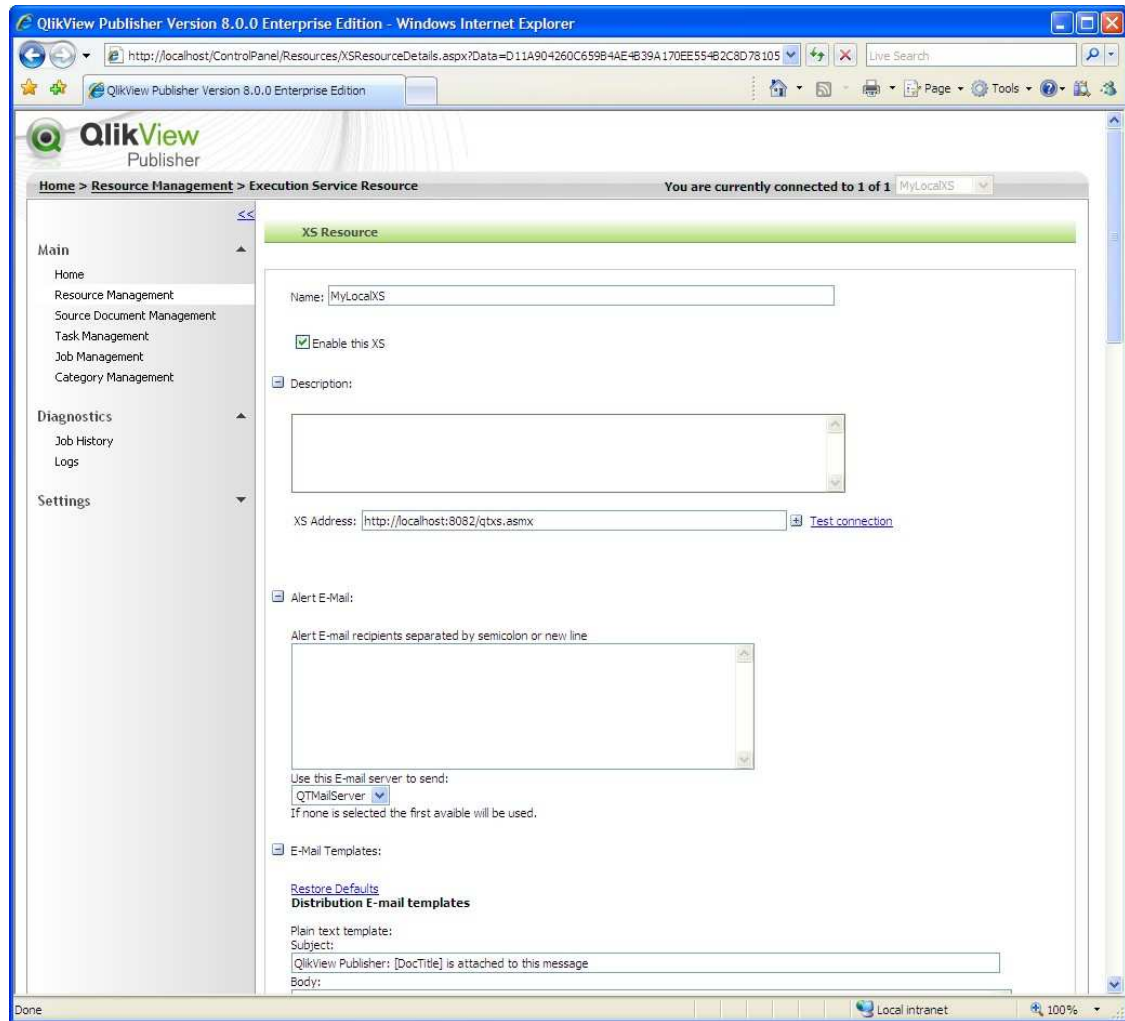
4.9.5.1 Available options and settings

- **Name.** The name that identifies the resource.
- **Description.** A descriptive text of the resource.
- **Folder.** The folder where the resource displays *Source Documents* from.

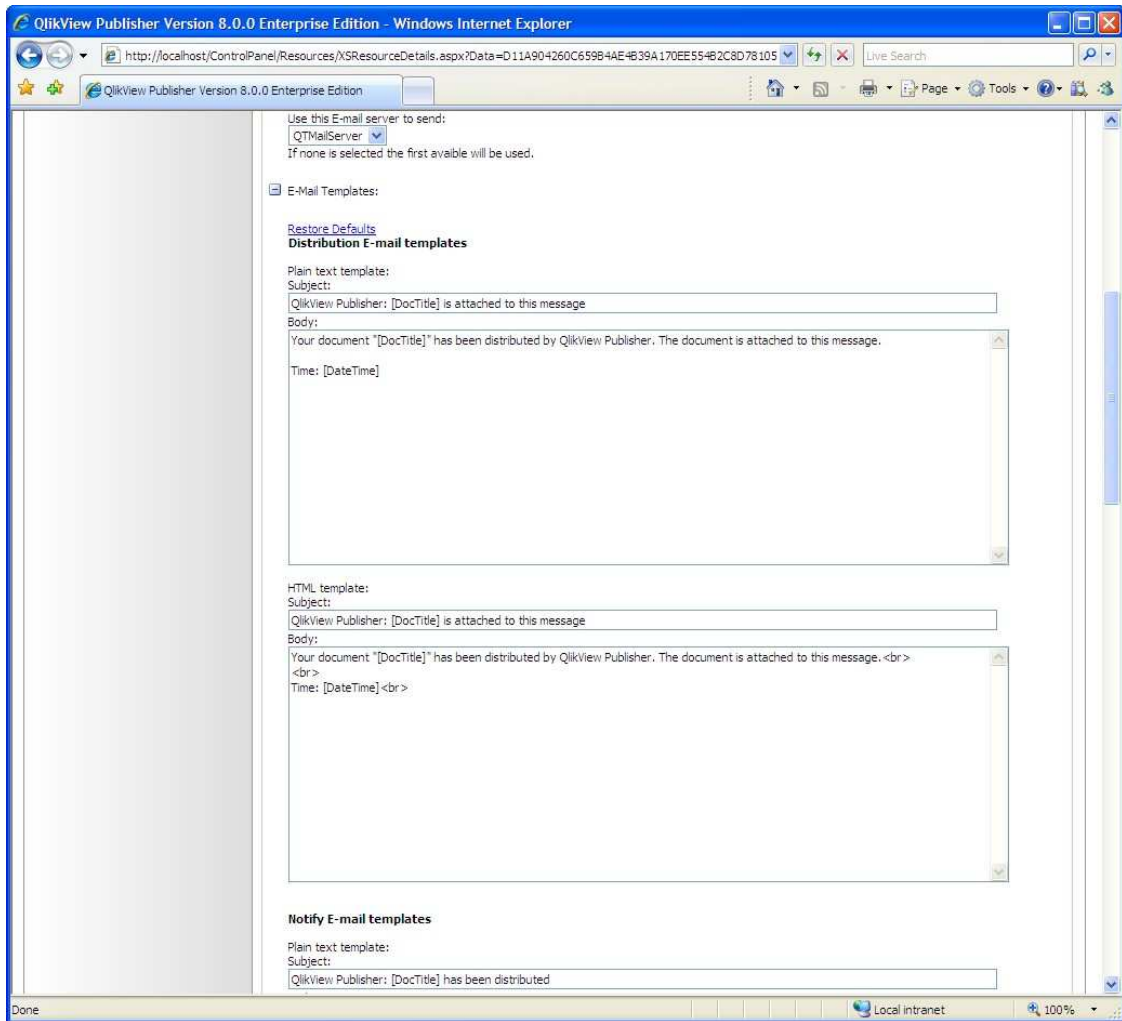
4.9.6 XS resources

The *XS (Execution Service) resource* is the component of QlikView Publisher 8 that interacts directly with the QlikView documents. It is through an *XS resource* that any other resource is utilized.

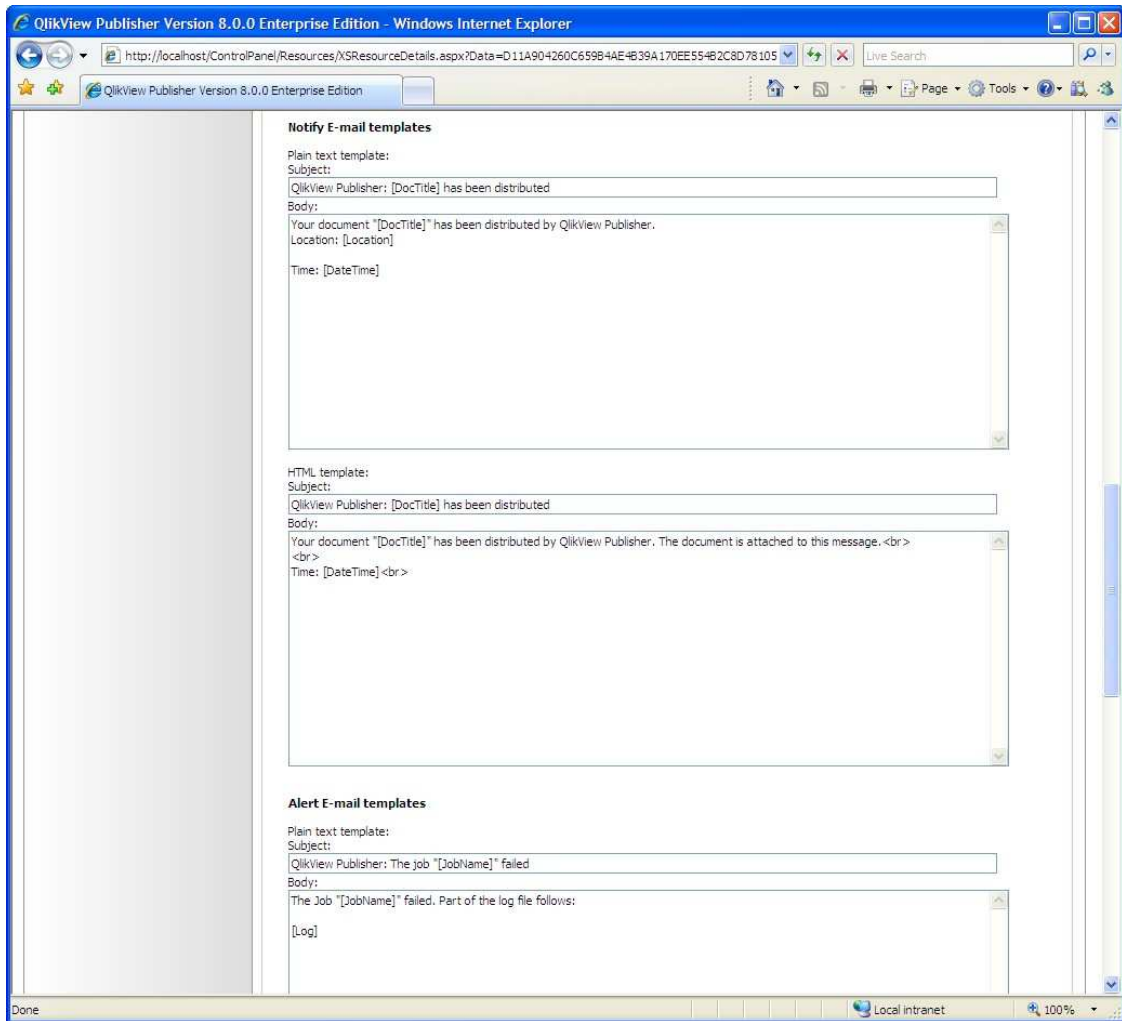
The following pictures shows all the options available when creating or editing an *XS*.



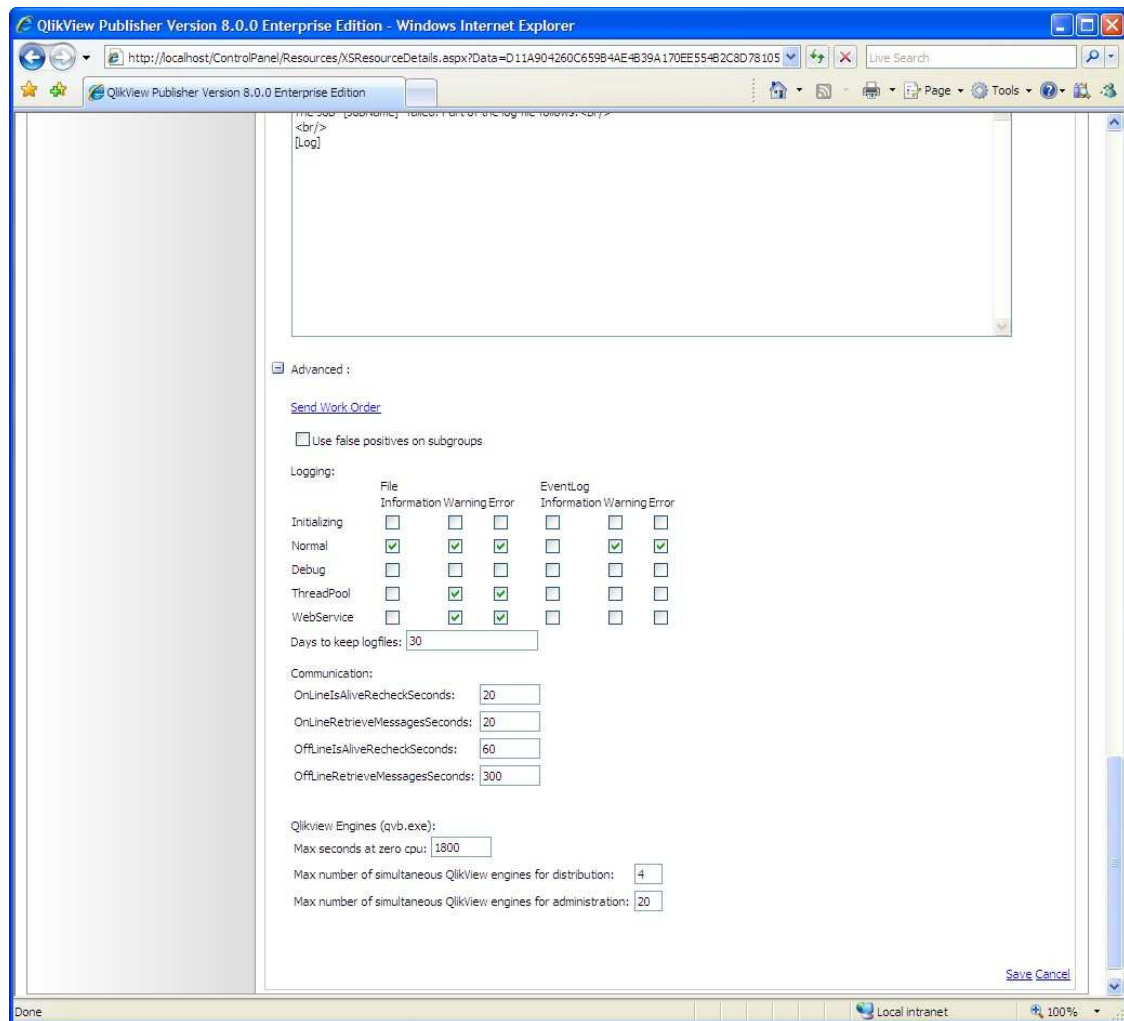
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4.9.6.1 Available options and settings

- **Name.** The name that identifies the resource.
- **Enable this XS.** Enables or disables the resource.
- **Description.** A descriptive text of the XS.
- **XS Address.** The path to the resource i.e. <http://myserver:8082/QTXS.asmx>
- **Test connection.** Checks the connection to the resource on the path defined under XS Address.
- **Alert e-mail.** Displays the options for Alert email.
- **Alert e-mail recipients.** Use semicolon or Enter to separate the addresses
- **E-mail server to use for sending.** Select which e-mail server resource you want to use.
- **E-mail templates** These are used to define what the distribution, alert and Notification email templates should look like. The following variables are available for use in the e-mails
 - [DocTitle] The name of the document

- [DateTime] The date and time when the e-mail was generated
- [Location] Where your document has been distributed (notification e-mails only)
- [JobName] The name of the job that generated the e-mail.
- [ResourceName] The name of the resource that was active when the error occurred. (alert mails only)
- [Log] Part of the log file for when the error occurred (alert e-mails only)
- **Advanced.** Displays the advanced options.
- **Send Work Order.** Sends the current Work Order to the resource. Also sends license and initialization information to the resource. (In QlikView Publisher 4 the information that was called initialization information)
- **Use false positives on subgroups.** Allows a quicker browsing of directory services. Each subgroup will have a + sign in front of it. Not until you click the + sign will the XS and DSC verify if the node has any subgroups.
- **Logging.** Allows you to set the level of logging in the XS log and in the Event Log.
- **Days to keep log files:** How many days should the XS logs be kept on disk before they are deleted.
- **Communication**
 - **OnLineAliveRecheckSeconds:** How often shall the XS check if it is currently on line with the Command Center, if its current status is Online
 - **OnLineRetrieveMessagesSeconds:**How often shall the XS try to retrieve messages from the Command Center if its current status is Online
 - **OfflineAliveRecheckSeconds:** How often shall the XS check if it is currently on line with the Command Center, if its current status is Offline
 - **OfflineRetrieveMessagesSeconds:** How often shall the XS try to retrieve messages from the Command Center if its current status is Offline
- **Max seconds at zero cpu.** Sets the time span before a QVB process will be killed if it is not using any CPU power. This is typically if used to kill QVB processes that have hung. **NOTE:** Running a script and reloading data from the database source for a time exceeding this time will get killed, since the QVB is using 0 CPU during this time.
- **Max number of simultaneous QlikView engines for distribution / administration.** Allows you to set how many QVBs should be running at the same time. The QVBs dedicated to distribution are used by the XS to reload and distribute etc. The ones used for administration are used by the *ControlPanel* to set up jobs and tasks.

4.9.6.2 How XS groups work

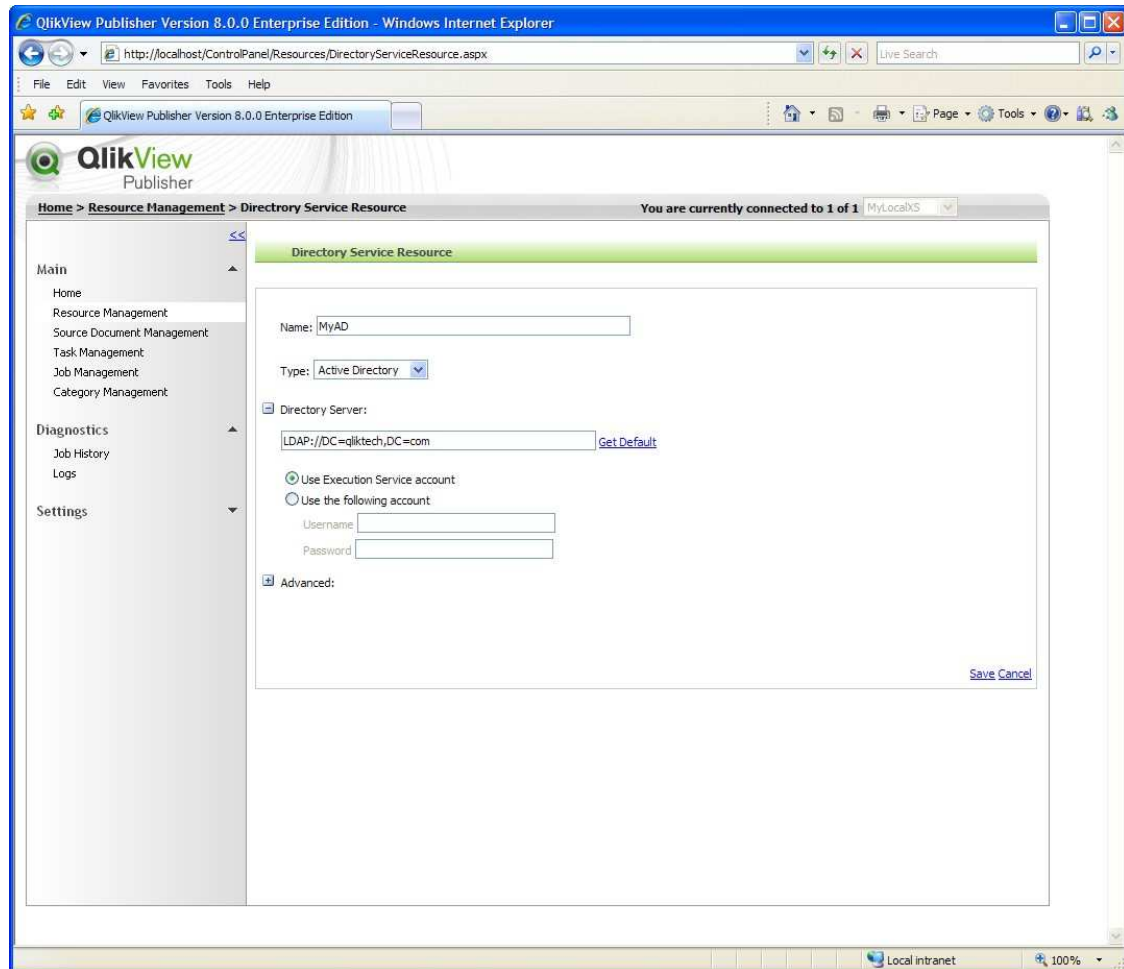
When you have registered more than one XS in a group, the entire group will take on the responsibility of executing the jobs not each separate XS. The workorder will be distributed to each of the XSs. Please note that each XS must be able to reach files and folders. It is recommended that you use UNC paths instead of relying on mapped drives, since mapped drives are often related to the account that is logged in.

When it is time for the XS to execute a job it will communicate with the *Command Center* to make sure that only one XS in the group will run the job.

4.9.7 Directory Service resources

The *Directory Service resources* connect QlikView Publisher to a directory service. QlikView Publisher supports Active Directory, Windows NT domains, local Windows users and groups and QlikView Publisher's internal Custom users and groups.

The *Directory Service* manages the reading of accounts that are used throughout *QlikView Publisher 8*.



4.9.7.1 Available options and settings

- **Name.** The name that identifies the Directory Service resource.
- **Type.** The type of directory service. The default supplied types are
 - Active Directory
 - Windows NT
 - Local users and groups on XS
 - Custom users and groups
- **Directory Server.** The address to the directory server.

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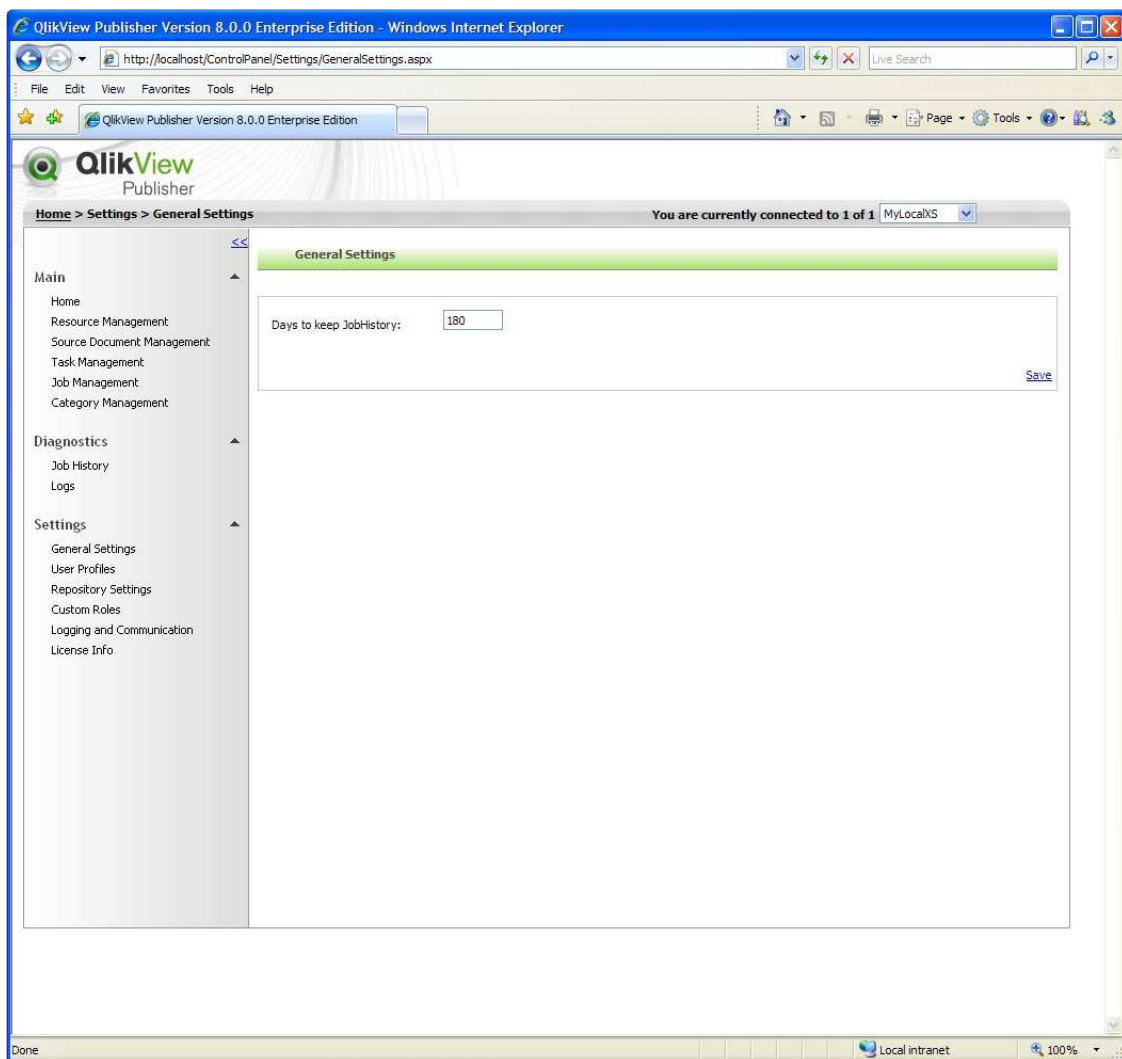
- **Get Default.** Retrieves the default address to the selected directory server.
- **Filter.** Lets you specify a filter for the results.
- **Divider at.** Sets the limit for how many objects should be shown at a time.

4.10 Settings

Settings allows you to create and edit the fundamental settings of your QlikView Publisher.

4.10.1 General Settings

General Settings contain the settings for how long the Job history files will be kept.

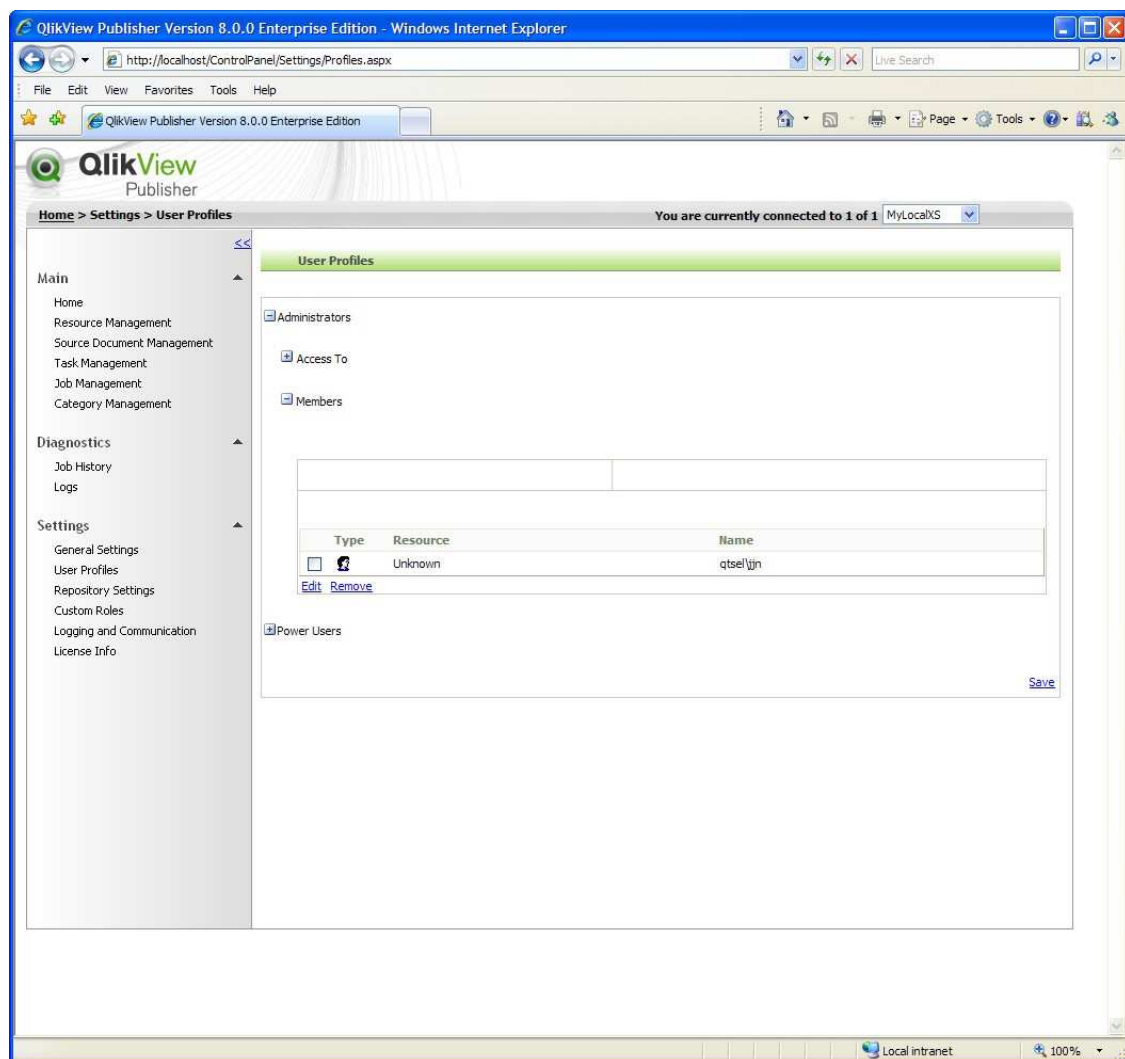


4.10.1.1 Administrate User Profiles

QlikView Publisher gives you the option to use *User Profiles*. As QlikView Publisher is accessed for the first time, the account that is used becomes a member of the *Administrators User Profile* by default.

To add more roles to the *User Profiles*, a *Directory Service resource* must be registered. Add a role to the *User Profile* by browsing for and selecting it from any of the available *Directory Service resources*. This role must be a system user.

As the *Control Panel* is opened for the first time, the account that is used when accessing will become a member of *Administrators* by default. After this, *Directory Service resources* can be registered and more users can be added.



Tip: It is highly recommended that only roles with administrative tasks such as system administrators are made members of the *Administrators User Profile*. To perform day-to-day operations, it is sufficient to be a member of the *Power Users* group.

NOTE: Please note that you can only select users, not groups as Administrators or Power Users

4.10.1.2 Available options and settings

- **Add.** Adds a user or a group to the currently selected *User Profile*.
- **Remove.** Removes a user or a group from the currently selected *User Profile*.

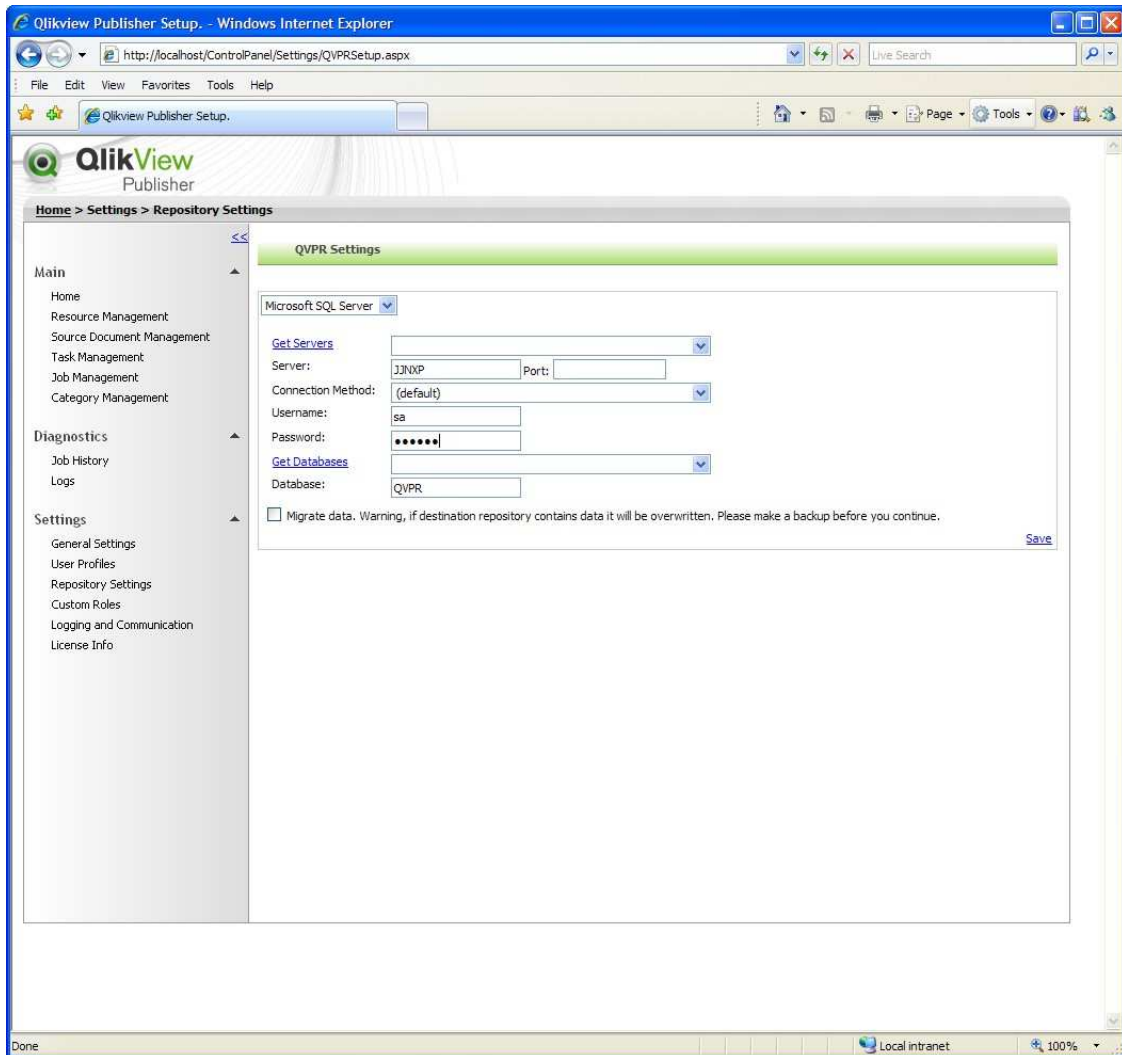
4.10.2 Repository settings

The *QlikView Publisher Repository Settings* lets the administrator configure the connection to the *QlikView Publisher Repository (QVPR)* meta database. The QVPR can use MS SQL Server or an XML based repository.

4.10.2.1 For MS SQL Server:

A connection to the *QVPR* database *can only* be set up through SQL Server authentication.

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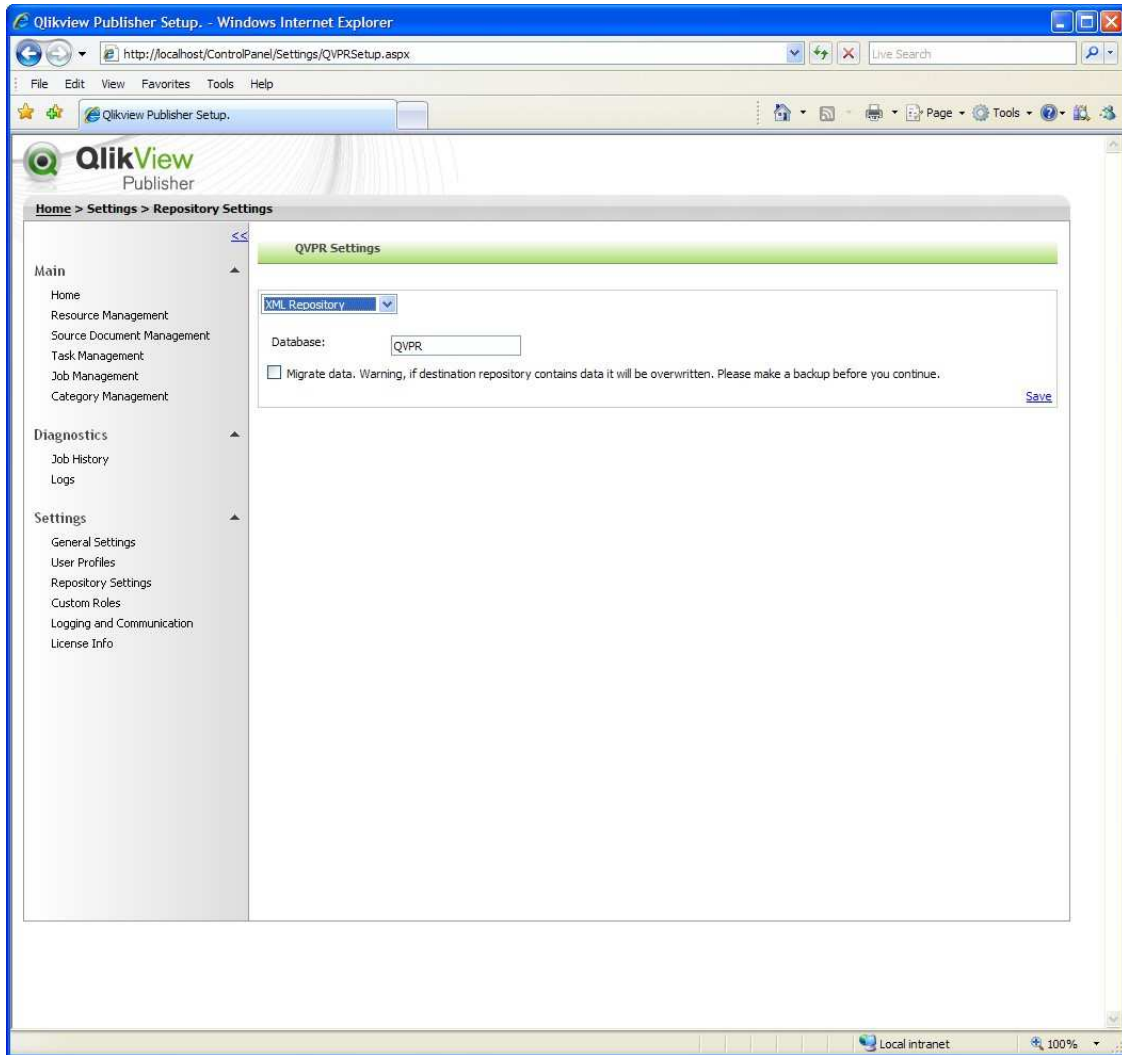


4.10.2.1 Available options and settings

- **Get Servers.** Retrieves a list of any available SQL servers.
- **Server.** The name of the selected SQL server.
- **Port.** The port through which the selected SQL server will be reached.
- **Connection method.** The method through which the communication to the SQL server will run.
- **Username.** The user name that is used when connecting to the SQL server.
- **Password.** The corresponding password that is used when connecting to the SQL server.
- **Get Databases.** Retrieves a list of available QVPR databases.
- **Database.** The name of the selected QVPR database.
- **Migrate data.** This moves the data in your current database to the one you create. You can either move from SQL Server to XML or to a different database within SQL Server.

4.10.2.2 For XML Repository

The *QlikView Publisher Repository Settings* can also be run as an XML Repository i.e. not as a SQL Server database. QlikView Publisher *Standard edition* uses this method.

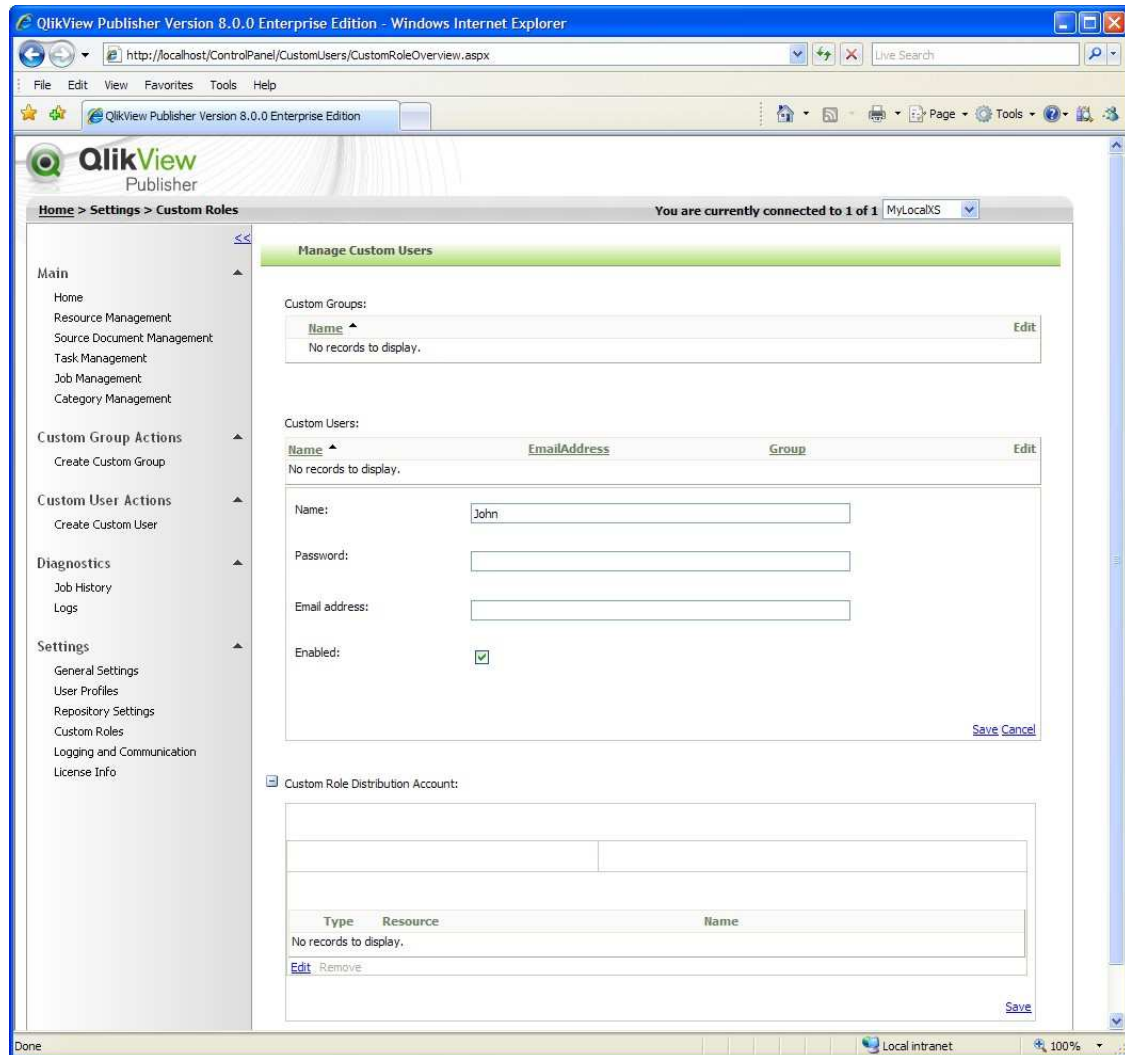


4.10.3.2.1 Available options and settings

- **Database.** The name of the database. There will be a new folder with this name under C:\Program Files\QlikView\Publisher\CommandCenter\App_Data.
- **Migrate data.** This moves the data in your current database to the one you create. You can either move from SQL Server to XML or to a different database within SQL Server.

4.10.3 Custom Roles

Custom Roles lets the administrator create, edit and delete *Custom Users* and *Custom Groups*. A *Custom User* can be a member of as many *Custom Groups* as the administrator sees fit. A *Custom Group* cannot contain another *Custom Group*.

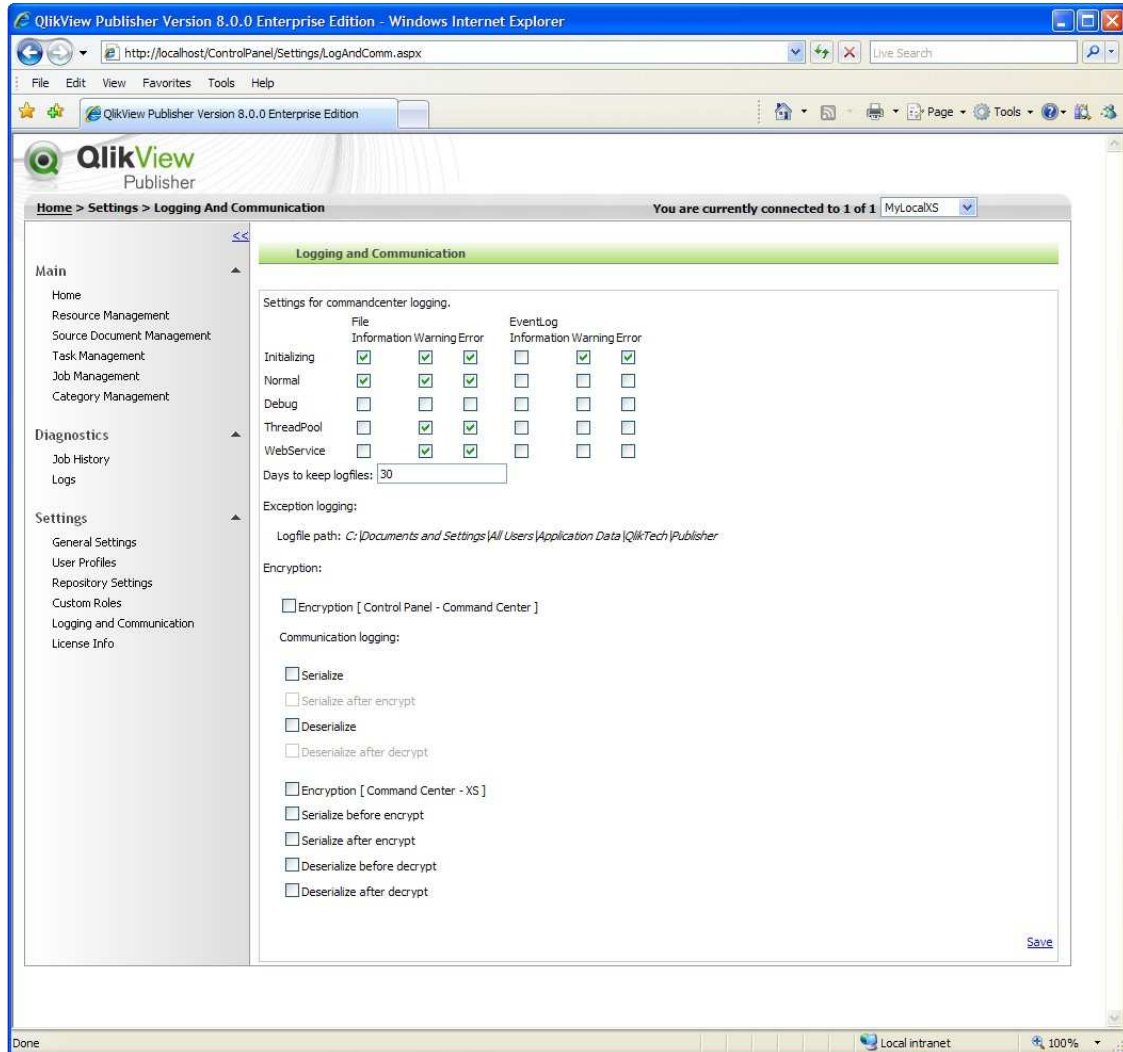


4.10.3.1 Available options and settings

- **Add.** Adds a *Custom User* or *Group*.
- **Clear selections.** Clears the selected *Custom Users* and *Groups*.
- **Edit.** Opens the **Edit** page for the selected item.
- **Delete.** Deletes the selected *Custom User* or *Group*.
- **Custom Role Distribution Account:** The account that *Custom Roles* will use when accessing the resources. This NTFS account will be the actual recipient of any *Distributed Documents* that the *Custom Roles* are given access to.

4.10.4 Logging and Communication

Logging and Communication contains the settings for exception logging, communication formats and encryption of communication between the different modules of the system.



4.10.4.1 Available options and settings

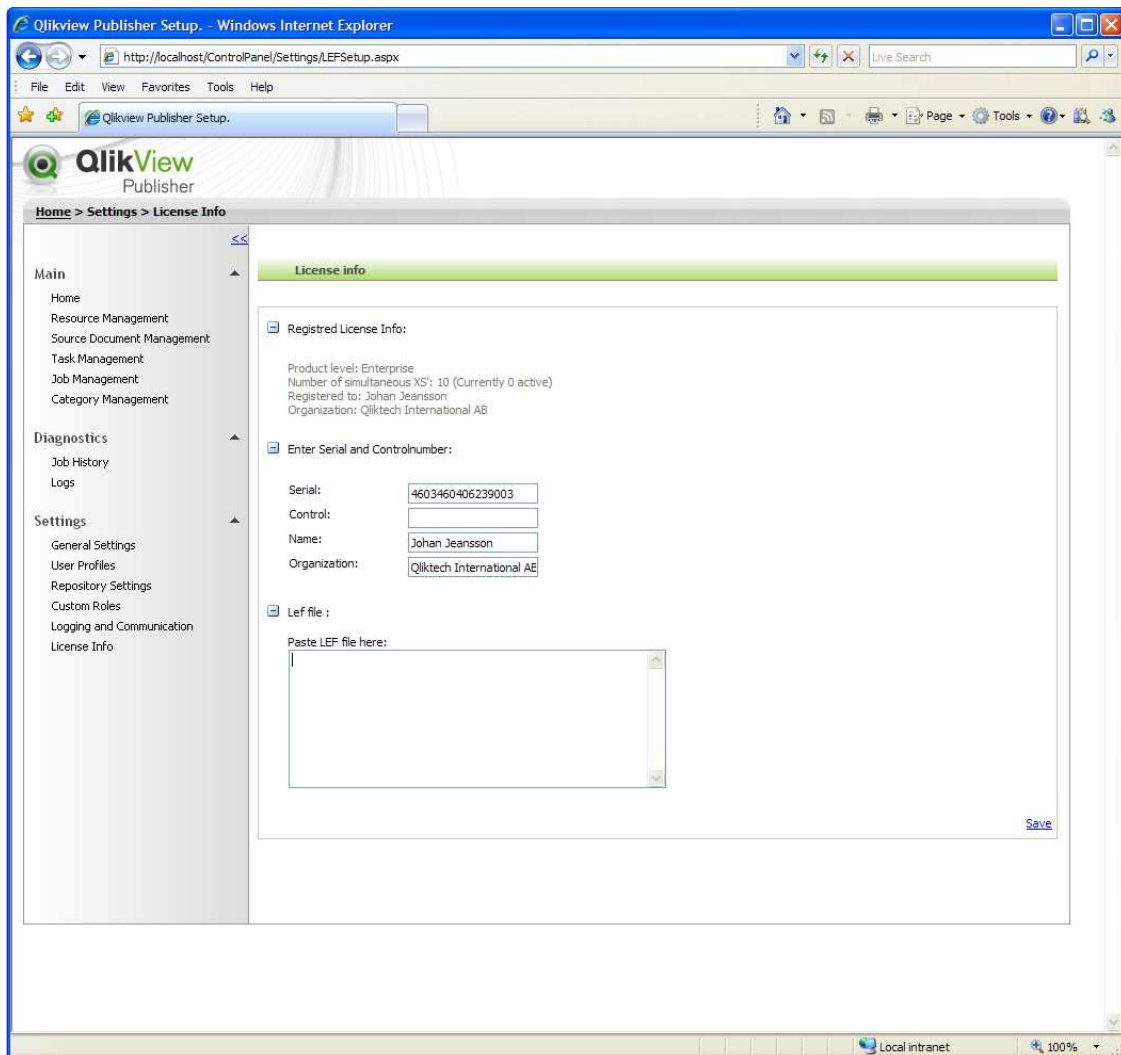
- **Encryption [Control Panel – Command Center].** Use encrypted communication between the *Control Panel* and the *Command Center*.
- **Serialize before encryption.** Log outbound clear-text communication.
- **Serialize after encryption.** Log outbound encrypted communication.
- **Deserialize before decryption.** Log inbound encrypted communication.
- **Deserialize after decryption.** Log inbound clear-text communication.
- **Encryption [Command Center - XS].** Use encrypted communication between the *Command Center* and the *XS*.

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- **Serialize before encryption.** Log outbound clear-text communication.
- **Serialize after encryption.** Log outbound encrypted communication.
- **Deserialize before decryption.** Log inbound encrypted communication.
- **Deserialize after decryption.** Log inbound clear-text communication.

4.10.5 Licensing Info

This page lets the administrator edit your licensing information. The license (and Licensing Enable File, LEF) decides if the installation is a *Standard* or an *Enterprise* edition as well as the number of simultaneous XS.



4.10.5.1 Available options and settings

- **Serial number.** The serial number that comes with the license.
- **Control number.** The control number that comes with the license.
- **Name.** The name of the owner of the license.

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- **Organization.** The organization that the license belongs to.
- **Paste LEF file here.** Here you can paste the content of a LEF file if you do not have the serial and control number. It is also useful when you do not have an internet connection on your server.

The license (and Licensing Enable File, LEF) is generated and stored under the \CommandCenter\App_Data directory in the folder labeled Publisher LEF. The LEF file itself is called PubLef.txt.

4.11 AccessPoint

AccessPoint resources are web sites displaying *Distributed Documents* to end users. When logged in, the user is presented with the *Distributed Document* he or she has been given access to.

The screenshot displays the QlikView Publisher AccessPoint 8.0.0 web interface. The browser window title is "QlikView Publisher AccessPoint 8.0.0 - Windows Internet Explorer". The address bar shows "http://localhost/accesspoint/default.aspx". The page header includes the QlikView logo and "AccessPoint". Below the header, it states "You are logged in as: qtsel\jtn [Logout](#)" and "Page last refreshed at: 2007-05-21 17:25:27".

Default Category	Last Update	Next Update	Analyze
Salary.qvw	2007-05-16 13:56	2007-05-16 14:56	
Salary_JJINXP_8082_20070516_180731.qvw	2007-05-16 18:07	EventDriven	
Salary_JJINXP_8082_20070516_181355.qvw	2007-05-16 18:13	EventDriven	
Salary_JJINXP_8082_20070517_140503.qvw	2007-05-17 14:05	EventDriven	
Salary_JJINXP_8082_20070517_150504.qvw	2007-05-17 15:05	EventDriven	
Salary_JJINXP_8082_20070517_151527.qvw	2007-05-17 15:15	EventDriven	
Salary_JJINXP_8082_20070517_160503.qvw	2007-05-17 16:05	EventDriven	
Salary_JJINXP_8082_20070517_170503.qvw	2007-05-17 17:05	EventDriven	
Salary_JJINXP_8082_20070517_174329.qvw	2007-05-17 17:43	EventDriven	
Salary_JJINXP_8082_20070517_174434.qvw	2007-05-17 17:44	EventDriven	
Salary_JJINXP_8082_20070517_180504.qvw	2007-05-17 18:05	EventDriven	
Salary_JJINXP_8082_20070521_090504.qvw	2007-05-21 09:05	EventDriven	
Salary_JJINXP_8082_20070521_100505.qvw	2007-05-21 10:05	EventDriven	
Salary2	Unknown	Unknown	
Static Distribution of Salary_JJINXP_8082_20070521_155006.qvw	2007-05-21 15:50	EventDriven	
Static Distribution of Salary_JJINXP_8082_20070521_155103.qvw	2007-05-21 15:51	2007-05-21 16:51	
Static Distribution of Salary_JJINXP_8082_20070521_165003.qvw	2007-05-21 16:50	EventDriven	
Static Distribution of Salary_JJINXP_8082_20070521_165103.qvw	2007-05-21 16:51	2007-05-21 17:51	
VariableDocAccess_0.qvw	2007-05-15 17:15	2007-05-15 18:13	

[Refresh Document List](#)

Please contact [Publisher Responsible](#) if you are experiencing problems with the AccessPoint or the documents published in it.

4.11.1 Available options and settings

- **Internet Explorer Client analysis.** Analyzes the *Distributed Document* through the QlikView Analyzer Client for Internet Explorer.
- **Java Client analysis.** Analyzes the *Distributed Document* through the QlikView Analyzer Client for Java.
- **Offline analysis.** Downloads the *Distributed Document* to the user's local computer.
- **Refresh Document List.** Refreshes the content of the page.

5 Support tools

5.1 LDIF Import

The LDIF import tool imports users and groups from an LDIF file into QlikView Publisher 8. The roles will be stored as *Custom Roles*.

```
LDIFImport /f=Filename [/url=CommandCenterURL] [/g=yes] [/?] [/help]
```

5.1.1 Available options and settings

- /f. Filename to import.
- /url. Base URL to *Command Center*. If left blank, the URL is assumed to be `http://localhost/Command Center/`.
- /g. Indicates that security groups should be imported. Memberships will not be imported.
- /? or /help. Displays this help text.

Example:

```
LDIFImport /f=c:\MyLdifFile.ldif /url="http://machine.com/Command Center/" /g=yes
```

6 QlikView Publisher 8 and Section Access

A very important change in QlikView Publisher 8 vs. older versions is that QlikView Publisher 8 respects the Section Access of any document it works with. This means that if you have a Section Access in your document script you must add the account that you are running the Execution Service (XS) under, or a group to which this account belongs, into your Section Access. The access level granted must be "ADMIN". If a dynamic reduction is made, the reduction field must be left empty

Example:

```
Section Access;  
LOAD * INLINE [  
    ACCESS, NTNAME, REDUCTIONFIELD  
    ADMIN, PUBLISHERACCOUNT,
```



```
USER,   HIC,   A
USER,   TNI,   B
```

Section Application:
Load ...

It is very important that the line with the Publisher Account has no value in the reduction field column (REDUCTIONFIELD in this example). If you instead would use a wildcard "*" in this column, this would limit QlikView Publisher's access to the data in the QlikView file to other values defined in the Section Access (A and B in this example; however, the values C to Z would not be included in your file).

If this is not done correctly, then the document can not be used by the Publisher at all or the data it can access will be limited.

7 Important notices and Troubleshooting

- All paths that are used by QlikView Publisher must be reachable from the application.

NOTE: It is highly recommended that a designated account is created to run *QlikView Publisher Execution Service*. This account must be permitted to log on as a Windows service. It must also be permitted to read from the directory service as well as to write to folders, change and set permissions on the content therein.

These requirements are met by the Domain Admin group. If the account is not a member of this group, an account with the above mentioned permissions must be created.

- Reduction based on Section Access may cause unwanted results in the *Distributed Documents* and should be used with caution.
- If QlikView Publisher has difficulties when reading from Active Directory, a probable cause is that the account running the application lacks permissions to read from the directory service. Check the permissions of this account.
- Make sure that Local Service, Network Service and the account running *QlikView Publisher Execution Service* have been given read and execute permissions to the .NET Framework component System.Management.dll.
- The *AccessPoint* and *QlikView Publisher Repository* both reside on platforms that cannot be protected from within QlikView Publisher. It is therefore imperative that both the web server hosting *AccessPoint* and the database server hosting *QlikView Publisher Repository* are protected according to standard.
- Should a field name within a *Source Document* change, QlikView Publisher will not be able to distribute *Distributed Documents* based on this field. Please ensure that field names used for reductions are correctly represented in the *Distributed Documents*.
- The number of roles given access to a file on a Windows computer cannot exceed 1820.
- *QlikView Publisher Execution Service* does not execute any macros that may exist in the *Source Document*.

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- If a *Source Document* contains an “Only One Selected Value” setting on a field, this setting will be respected by QlikView Publisher. Any selections made on the document will be affected by this field.