

Reference Manual

Version 8.5 for Microsoft Windows® Second Edition, Lund, Sweden, June 2008 Authored by QlikTech International AB JJN

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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 application development. Please consult our homepage for current information on how to get in touch with our support services. You will find us at:

http://www.qlikview.com.

QlikTech International Headquarters

QlikTech International Phone: +1 (888)-828-9768 150 N. Radnor Chester Road Fax: 610-975-5987

Suite E220

Radnor, PA 19087

USA

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

1.2 Conventions

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.

1.3 About this manual

This manual describes QlikView Publisher 8.50. The content of both the software as well as the manual may change without prior notice.

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 your primary resources inside Publisher

2.1 Prerequisites

QlikView Publisher 8.50 runs on the following environments:

- Microsoft® Windows 2000TM; or
- Microsoft® Windows 2000TM Server; or
- Microsoft® Windows Server 2003TM; or
- Microsoft® Windows XPTM
- Microsoft Windows VistaTM

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 and/or AccessPoint).

2.2 Database requirements and recommendations

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

The supported versions of Microsoft SQL Server are SQL Server 2000 and 2005. If you have a Microsoft SQL Server already set up we recommend using that. The XML repository is sufficient for most installations when it comes to performance.

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

2.3 Installation

For a 32-bit installation, run <code>QvPublisherSetupRedist.exe</code>. For the 64 bit version run <code>QvPublisherX64SetupRedist.exe</code>. 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.

Select Installation Type

When you start the installer you select which region you are located in and to whom the product shall be licensed. 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 Connector.

Set the installation folder and leave the check box, **Install all features**, marked to install the complete product or unmark it to choose the components you want to install.



If you are setting up a distributed environment with Execution services on different machines unmark the check box **Install all features** 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.

Note If the computer you are installing to have more than one partition or harddrive and that drive has more free space than C:,the QlikView Storage will be installed to this. To be able to set the installation directory, you must choose Install All Features. Choose QlikView Publisher Folders and click Browse to set the path.

Logon Information

This step is skipped if you selected Standard Edition.

Specify the account that the Execution Service and Directory Service Connector will run under.



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

3 Post Installation Settings

3.1 Running QlikView Publisher 8.50 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 or the corresponging folder. This step is not necessary if only the XS is installed on the computer. 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.

3.2 NT Accounts to be used with QlikView Publisher

Please make sure that the account running the Execution Service (XS) is granted modify access to the folders that this instance of QlikView Publisher 8.50 may require. The account needs access to the following folders:

- Installation folder (default is C:\program files\qlikview\publisher).
- Application data folder (default is different depending on operative system,
 e. g. on a Windows XP it is C:\Documents and Settings\All
 Users\Application Data\QlikTech\Publisher). This setting can be changed in each service's config file.

If you intend to access folders on the local computer, a local administrator account is sufficient.

Please also make sure that the account running the Director Service Connector (DSC) has the right to read from the Directory Service that you plan to use.

3.3 Installation on one single machine

If all components of QlikView Publisher are installed on the same machine you do not need to modify any settings and the only action you need to take before running QlikView Publisher is to start the services. The following services are part of the QlikView Publisher installation and are all found in the Windows Management Console Services; QlikView DirectoryServiceConnector, QlikView Http Service,

QlikView Publisher AccesspointService, QlikView Publisher CommandCenterService and QlikView Publisher ExecutionService.

3.4 Installation on multiple machines

There are many possible installation combinations for QlikView Publisher 8.50. Here we will go through the settings you need to modify in order to install different components on different machines.

Execution Service

The XS needs to know which DSC it will communicate with. This is set in the file C:\Program Files\QlikView\Publisher\ExecutionService\QVPublisherExecutionService.exe.config

If you use any other value than the default, which is http://local-host:8083/qtds.asmx, you modify the key:

<add key="DSCAddress" value=""/>

Directory Service Connector

The DSC has no settings that need to be modified if you install on different machines.

Command Center

The command center has no settings that need to be modified if you install on different machines.

AccessPoint Service

The AccessPoint Service has no settings that need to be modified if you install on different machines.

Control Panel

The Control Panel needs to know where the Command Center is located. This is done in the file C:\Program Files\QlikView\Publisher\ControlPanel\Web.Config.

The key <add key="CommandCenterURL" value="http://local-host:8081/qtcc.asmx"/> specifies where it is located.

3.5 Initial set up inside Publisher

As the user logs in, User Profiles are applied. Based on that settings and resources are shown. The user must select an Execution Service or, if there is none registered, register a new.

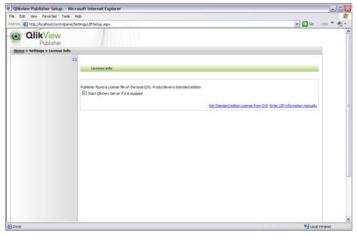
When this is done, a connection to a QlikView Publisher Repository will be established. This is done through the Command Center.

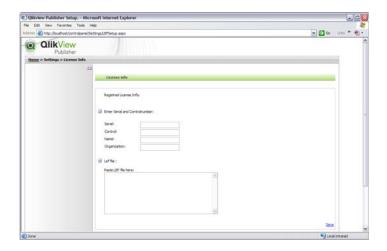
In order to perform any of the tasks within QlikView Publisher, resources must be registered. The resources are tied to an XS and only available from the XS they belong to.

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

Apply License

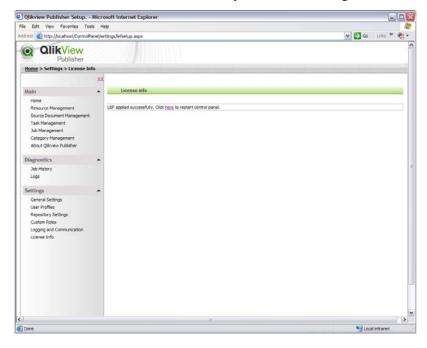
The first time you connect to QlikView Publisher 8.50 you have to enter your License. An automatic call is made to see if there is a QVS version 8 or later available on the machine. If there is, you will see the LEF for that and be asked if you want to use that license to make your installation a Standard 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.





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.

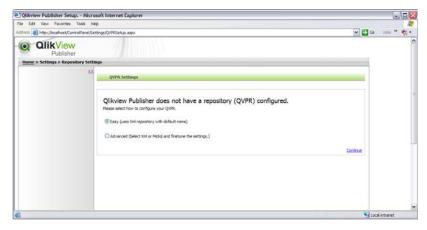
After the information has been validated you see the following:



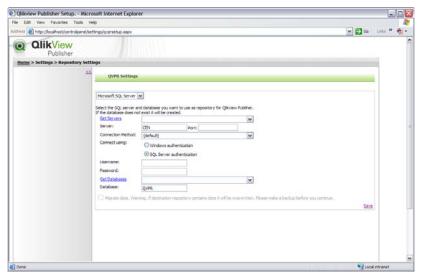
Create and connect to the QlikView Publisher Repository meta database

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. Choose **Easy** to create an XML repository called QVPR. This is configured to be backed up every day at 00:00. Choose **Advanced** to configure an MsSQL repository or an XML repository with your own settings.

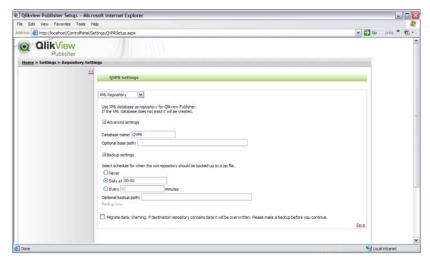


The SQL server setup needs settings as seen in the picture below.



Please note that the connection to the SQL Server may be either Inegrated Security, or SQL Server security. If the Integrated Security is used, make sure that the account under which the Command Center is running, has sufficient rights in the targeted SQL Server.

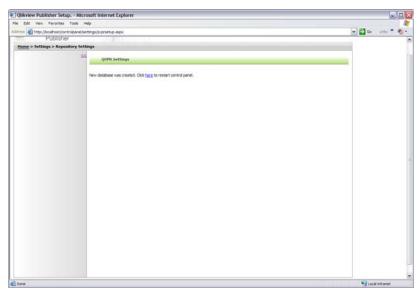
The XML repository is configured as seen below.



Give the XML repository an appropriate name. If you want the XML repository to be created in a folder other than default, enter the path to that location in **Optional base path.**

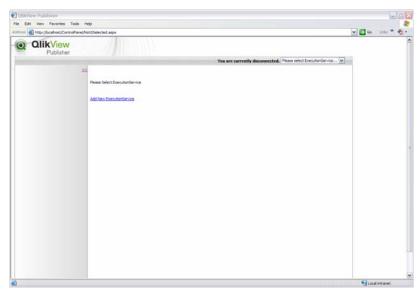
On this page you can also configure backup of the repository. The backup is saved as a zip file and uses the timestamp of its creation as name. Set the backup to another path by entering a path in **Optional backup path**. **Backup now** will instantly create a zip file, but is disabled until a database has been created.

When you have created your QVPR you see the following:

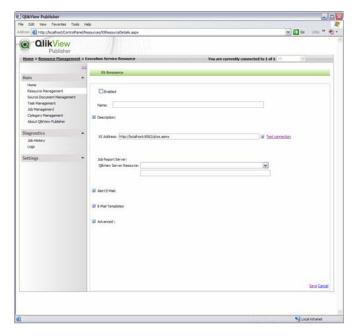


Register an Execution Service (XS)

The basic component in any QlikView Publisher 8.50 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.



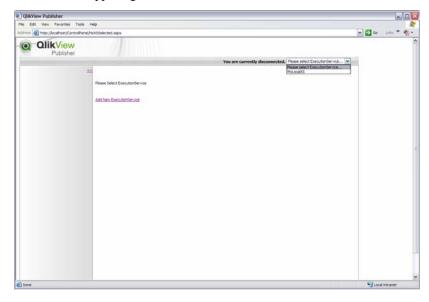
Start by entering a name for your XS and make sure that **Enable this XS** is checked. Under **Description**, you can enter a descriptive text of the resource. The description will be shown in the resources overview list.

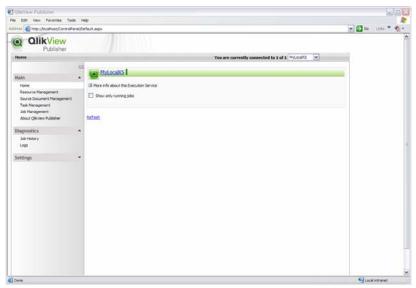
The **XS Address** field contains the path to the XS. By default, the XS communicates on port 8082. Click **Test Connection** to test the connection to the XS. If the XS is installed on another machine the address needs to be modified accordingly.

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 features of QlikView Publisher 8.50 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.

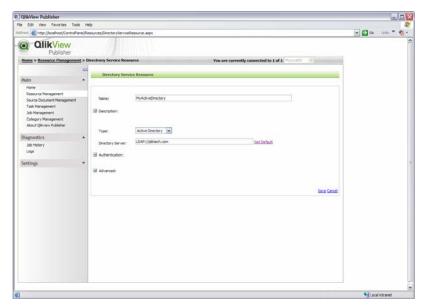




Register a Directory Service Resource

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.



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 8.50 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.

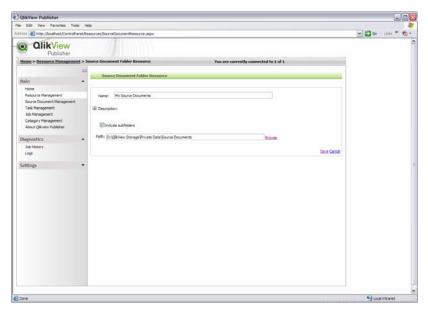
It is also possible to enter new Directory Services using the Directory Service Connector and create your own Directory Service Provider for any Directory Service that is not by default included in QlikView Publisher 8.50.

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

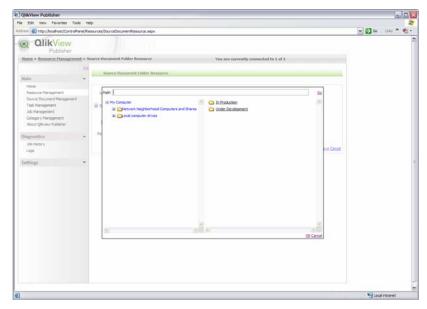
Your **Directory Service Resource** is now ready to be used.

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.

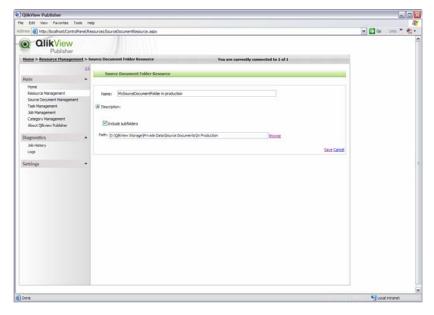


You can browse for shares by expanding the **Network Neighborhood Computers and Share.** This allows for easy entering of UNC paths.



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 con-

tains, 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 OlikView Publisher 8.50.

3.6 Upgrading from QlikView Publisher 4 to 8.50

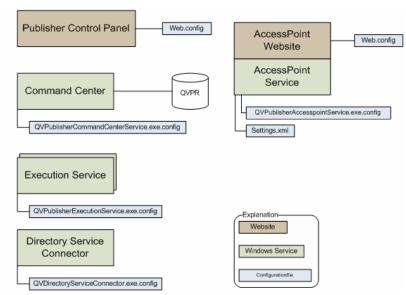
If you have been using QlikView Publisher 4 and want to upgrade to version 8.50 without losing your settings, tasks and jobs etc, follow these steps:

- 1 Perform a backup.
- 2 Stop the IIS and the XS.
- 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.
- 4 If you are using a SQL Server as your QlikView Publisher Repository then you do not need to copy anything.

- 5 Uninstall QlikView Publisher 4 through **Add or Remove programs.**
- 6 Do a normal installation of QlikView Publisher 8.50.
- 7 Apply the LEF.
- If you were using an XML repository, move the folder to C:\Documents and Settings\All Users\Application
 Data\QlikTech\Publisher\CommandCenter\.
- 9 Point to your new database in the QVPR setup.

4 TECHNICAL OVERVIEW OF QLIKVIEW PUBLISHER 8.50

There are several views that can show how a QlikView Publisher installation can be represented. In this part of the manual we will first look at the different installed components and their configuration files. Then we will look at the logical usage of these components.



4.1 Installation overview

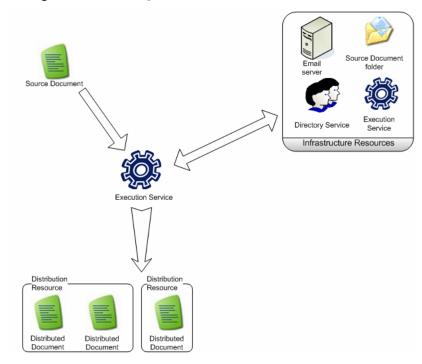
The components that will be installed are:

- The Publisher Control Panel is a set of ASPX based web pages that are used to configure what the QlikView Publisher will do. A QlikView Publisher installation has only one Control Panel.
- The Command Center is the central coordinating component in QlikView Publisher. It is responsible for maintaining the QlikView Publisher Repository (QVPR) and keeping track of the different components. A QlikView Publisher installation has only one Command Center.

- The Execution Service is the component that is responsible for performing the preparation and delivery of the QlikView files. A QlikView Publisher installation can contain many Execution services located on different machines.
- The Directory Service Connector is responsible for communicating with the Directory Service that keeps track of all the users and groups in your environment.
- The AccessPoint website is a set of ASPX based web pages that allows each user to get access to his or her documents.
- The AccessPoint Service is responsible for preparing the files in the folder and checking access rights on them.

4.2 Logical view

The logical view of how QlikView Publisher works looks like this.



The user of the Publisher Control Panel sets up a number of resources, that are then used by the QlikView Publisher to prepare and distribute the QlikView documents. The resources are divided into two different groups, Infrastructure resources and Distribution resources. The Infrastructure resources are resources that in some way interact with the surrounding environment. The Distribution resources are used to make the QlikView documents available to the end-users.

The Infrastructure Resources are:

Execution Service Resource

The Execution Service Resource, prepares the QlikView files and distributes them to each user.

Directory Service Resource

The Directory Service Resource keeps track of which users that exist. You need to create one Directory Service Resource per Directory Service Provider (DSP). A DSP is a connection to a specific Directory Service. The included DSPs allows you to connect to Active Directory, NT4 domains, Local Users and Custom Users. Custom Users are users that only exist inside Olik View Publisher and have no matching Windows user attached to them.

Email Server Resource

The Email Server Resource is used for both distributing QlikView files as well as sending Alert and Notification emails.

Source Document Folder Resource

The Source Document Folder Resource keeps track of which folder(s) contain the Source Documents that QlikView Publisher will use as a basis for the Distributed Documents.

The Distribution Resources are:

Distribution Folder Resource

This allows for distribution to a folder either on the local computer or on the network. If you distribute to a network folder, it is recommended that you reference this by the UNC path rather than by a mapped drive.

Email Distribution Resource

The Email Distribution Resource sends the QlikView document as an attachment in an email.

AccessPoint Distribution Resource

The AccessPoint Distribution Resource will distribute the QlikView document an AccessPoint.

QlikView Server Distribution Resource

The QlikView Server Distribution Resource will distribute the QlikView document to a QlikView Server running in DMS mode. For a more detailed description of what DMS mode means please reference the QlikView Server

Reference Manual. An AccessPoint may be connected to the QlikView Server. For more information please reference the QlikView Server Reference Manual.

4.3 Editions

QlikView Publisher comes in two different editions, Standard Edition and Enterprise Edition. The Enterprise Edition has all the features and resource described in this manual. The Standard Edition is limited in what features and resources it has, as well as what setups are available. The Standard Edition can only run Reload tasks and no other task type. For a more detailed description of what a task is and what it is used for please reference section 5.1

5 VOCABULARY

5.1 Tasks

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

	Standard Edition	Enterprise Edition
Reload Task	*	*
Distribution Task	-	*
Repeat Task	-	*
External Program Task	-	*
Pause Task	-	*
DBCommand Task	-	*
EDX Task	6	*

Reload Task

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

Distribution Task

A Distribution task produces a Distributed Document, a distributed version, based on a Source Document.

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.

External Program Task

An External Program tasks execute a command line statement.

Pause Task

A Pause task pauses during a specified time or until a specified time.

DbCommand Task

A DBCommand task execute a SQL command using a connection string.

EDX Task

An EDX Tasks triggers a job using Event Driven Execution (EDX). You need to select which XS and which job should be executed.

5.2 Jobs

A Job 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.

5.3 Dependencies

Dependencies are a way of ensuring that tasks that depend on other tasks only run if the depending task has been correctly run.

5.4 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.

5.5 Source Documents Sets

Source Document Sets are an easy way to make more than one Source Document act as one. For example, if you have some documents that always have to be reloaded in a certain order, you can put them in a Source Document Set and make sure they are sorted in the correct load order. When using that Source Document Set in a Reload Task, the reloads will always be made in the predefined order. Should one of the document in the set tail, the rest of the set will not be reloaded either. Source Document Sets can only be used in Reload Tasks.

5.6 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.

5.7 Users and User Profiles

QlikView Publisher 8.50 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 8.50 contains three different User Profiles: Administrators, Power Users and EDX-enabled 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. An EDX-enabled User only has access to the webpage that triggers EDX but no other part of the Control Panel.

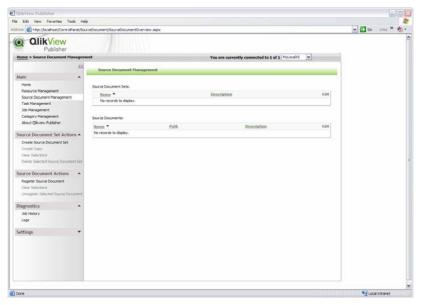
A user is assigned to a User Profile by an Administrator.

6 How to get going after the initial setup

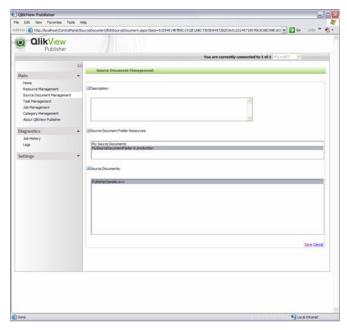
After the initial setup has been made and the basic resources are in place you can start with defining the actual jobs and tasks that will create the distributed documents. An example application is included in the installation package. To use it and follow the rest of this manual, please copy the files from its installation path of C:\Program Files\QlikView\Documentation\Examples\PublisherSample.qvw and also copy the source file PublisherSample.mdb to the folder C:\QlikView Storage\Private Data\Source Documents\In Production.

6.1 How to register a source document

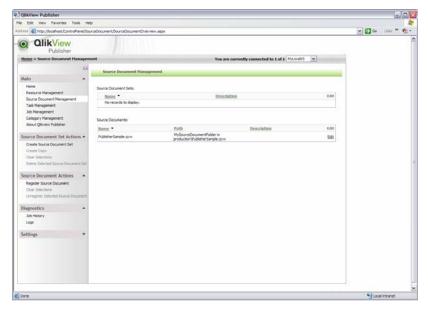
The first step is to register the source documents that will be used. Do this by clicking **Source Document Management** in the menu to the left.



Then click **Register Source Document**. You can now select as many Source Documents as you like to register, using SHIFT+Click or CTRL+Click. If a document is registered twice the registration is ignored.



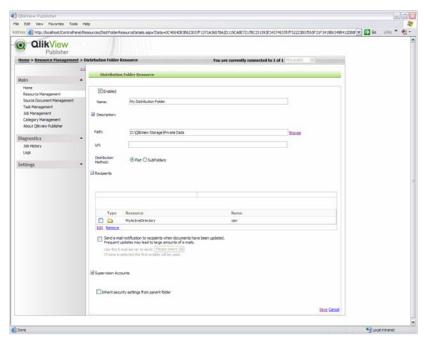
After you have selected your Source Documents click the **Save** link and you will be back at the start of the Register Source Document page again.



The next step is to set up a Distribution Resource

6.2 How to set up a Distribution Folder Resource

Click **Distribution Folder Resource** in the menu, then fill in the information below

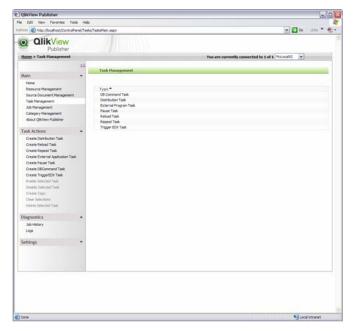


Give the Folder the name My Distribution Folder. Browse to the path C:\QlikView Storage\Public Data\Personal Folder, under Recipient select the root of the Directory Service you have previously created. For more information on how recipients on Distribution resources and distribution tasks are matched please refer to paragraph 8.2

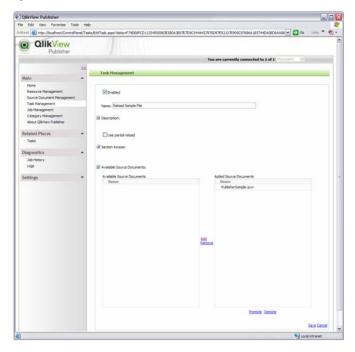
Click **Save** and then you are ready to set up your first tasks.

6.3 How to set up a task

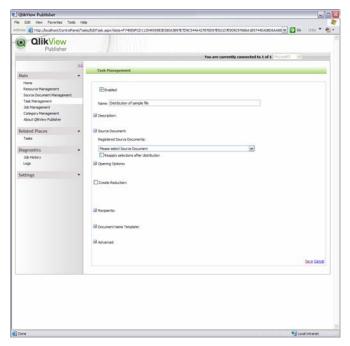
To set up your first task select **Task Management** in the menu.



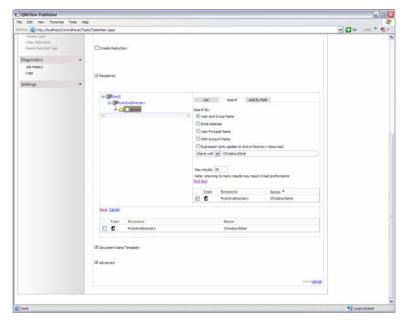
The first task that you will create is a reload task that will refresh the data in a QlikView document. Click **Create Reload Task** and fill in the information below.



The reloading of a task is also possible from the command line, see page 113 The next task that we will create is a Distribution Task, do so by clicking **Create Distribution Task** in the **Task Actions** part of the menu.



Start with giving the task a name, Distribution of sample file. Then select the Registered source document that will be used, **PublisherSample.qvw**. After that you need to select which Recipients shall receive the file.

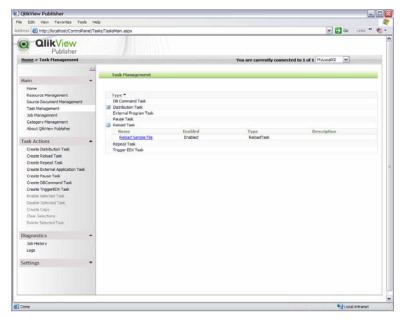


The fastest way of finding yourself in the Directory Service Resource is to use the **Search** function.

For more information about how recipients on resources are matched with recipients on distribution resources please see paragraph 8.2 "How recipients on a task are matched with recipients on a resource"

After you have found and selected yourself in the Directory Service Resource, click the **Save** link to the left, this will save your Recipients and also enable the **Save link** in the lower right corner.

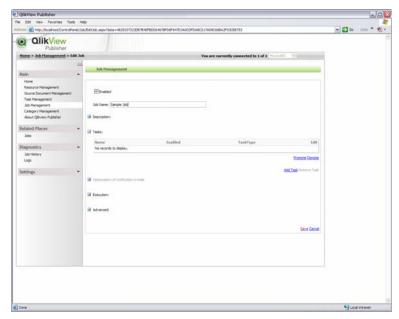
After you click that Save link you will return to the Task List.



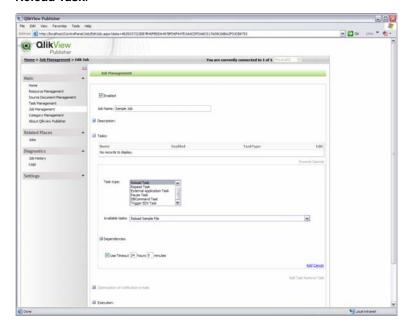
Now you have the two tasks that will are needed for creating the Job.

6.4 How to set up a job

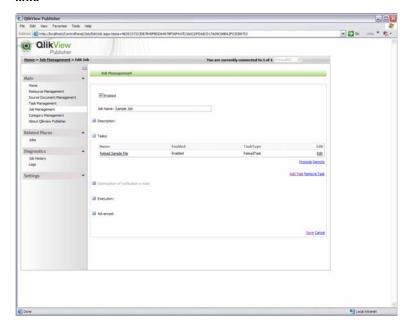
To create a Job click on the **Job Management** link in the menu.



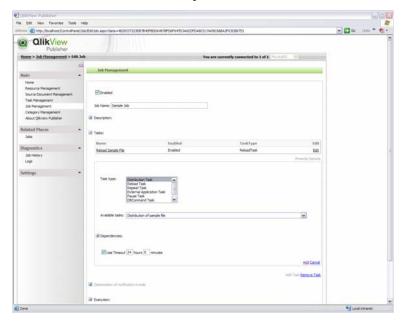
Give the job the name Sample Job and then click the ${\bf Add}\ {\bf Task}$ link to include the ${\bf Reload}\ {\bf Task}$.



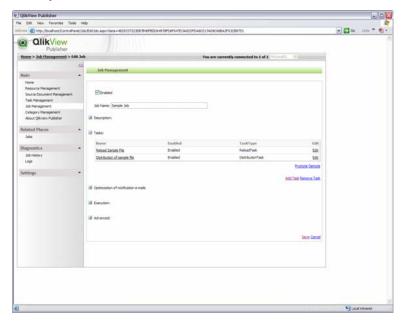
In the drop down list called **Task Type**, select **Reload Task**, and then select the **Reload Sample file** task in the dropdown list **Available tasks** and then click the **Add link**.



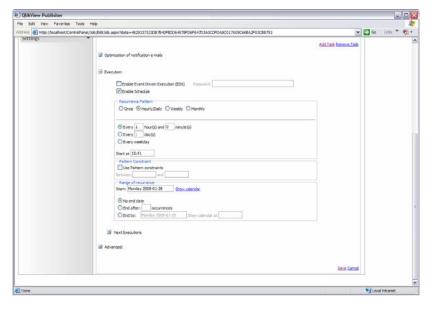
After having clicked the **Add link** you will see the screen above. Click the link **Add Task** to add the second task to the job.



This time select the Task type Distribution Task and the Available task Distribution of sample file and then click Add.



From the view above you can modify the order of execution in the job by selecting a task and using the **Promote** and **Demote** links. The final part is to set a schedule on the job do this by expanding the **Execution** button.

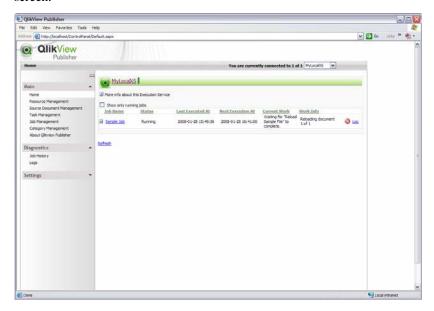


The default value is that the job will run every hour. For this sample leave it to that default value. Click the **Save** link and your job will be created. Then click the **Home** link in the menu and you will see the screen below.



Note It is not possible to manually start a job while the fron page is refreshing.

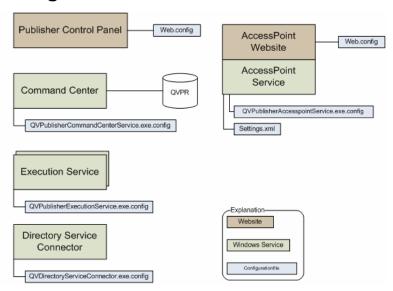
The job will now be executed and you will see a current status displayed on the screen.



Now check that the distributed document has appeared in the folder C:\QlikView Storage\Public Data\Personal Folder, the name of the file is by default the same as the name of the task, so it will be named Distribution of sample file.qvw.

7 DETAILED TECHNICAL VIEW

7.1 Configuration files and how to use them



Control Panel - Web.Config

In a default installation this file is found under C: \Program

Files\QlikView\Publisher\ControlPanel. This file contains a lot of settings needed for the Control Panel web site, most of which never need to be modified. The part that may need modifications is the tag appSettings.

```
<appSettings>
   <add key="LogFileFolder" value="Log"/>
   <add key="CommandCenterURL" value="http://
localhost:8081/qtcc.asmx"/>
   <add key="CommandCenterKey" value=""/>
   <add key="ApplicationDataFolder" value=""/>
   <add key="GetUsernameFromHeader" value="false"/>
   <add key="UserHeader" value="SM_USER"/>
   <add key="EnableSoapExtensions" value="true"/>
</appSettings>
```

The tags mean the following:

LogFileFolder

This is the name of the subfolder where the log files are stored.

CommandCenterURL

Where the Command Center is located. If you modify the port that the Command Center uses or if the Command Center is located on a different machine than the Control Panel, you need to modify this value.

CommandCenterKey

This can be used to make sure that only allowed Control Panels get to connect to the Command Center. The value specified in this file should match the value in the QVPublisherCommandCenterService.exe.config file, or the connection will be refused.

ApplicationDataFolder

This is the folder where the log folder and all other files/folders for the Control Panel will be created. The default value is C:\Documents and Settings\All Users\Application

Data\QlikTech\Publisher\ControlPanel.

GetUsernameFromHeader

This is used to read your login credentials from the http header, instead of from the logged-in Windows User.

UserHeader

This is the name of the header that will be used for reading the username.

EnableSoapExtensions

The Soap extensions used in QlikView Publisher are for logging and encrypting. They are set in the **Control Panel** under **Settings**, **Logging and Communication**. Set to False for double-byte languages, such as Japanese and Chinese, as they do not support these Soap extensions.

Command Center – QVPublisherCommandCenter-Serice.exe.config

In a default installation this file is found under C:\Program
Files\QlikView\Publisher\CommandCenterService. This file has a
number of automatically generated tags that should not be modified, but
there is one tag that contains application settings that can be modified.
Below is an excerpt from the config file. Read more about the snmp section
on page 125.

The tags mean the following:

CommandCenterMachinename

This is used to communicate to the Directory Service Connector where it can locate the machine when looking for Custom Users, which are handled by the Command Center.

WebservicePort

This is the port that the Command Center will use to communicate with. The default value is 8081. If you modify that you will need to modify the web.config in the Control Panel too.

ApplicationDataFolder

This is the folder where the log folder and all other files/folders will be created. The default value is C:\Documents and Settings\All Users\Application Data\QlikTech\Publisher\CommandCenter. This folder is where the XML version of QVPR and the LEF information are

stored. CommandCenterKev

This can be used to make sure that only allowed Control Panels get to connect to the Command Center. The value specified in this file should match the value in the web.config file in the Control Panel, or the connection will be refused.

WebserverType

This is the web server used. The default value is Windows web server. Use the value **internal** to use the QlikView Http Service.

SystemSecurityLevel

This sets the type of authentication. This setting is only applicable if the webservertype is set to system.

AuthorizeAuthenticatedClients

This sets whether the authenticated clients must be authorized as member of a certain group. The setting is not applicable if the **SystemSecurityLevel** is set to anonymous.

AuthorizationGroup

This is the name of the group to which the authenticated clients must belong, if the AuthorizeAuthenticatedClients is set to true.

EnableSoapExtensions

The Soap extensions used in QlikView Publisher are for logging and encrypting. They are set in the **Control Panel** under **Settings**, **Logging and Communication**. Set to False for double-byte languages, such as Japanese and Chinese, as they do not support these Soap extensions.

Execution Service - QVExecutionService.exe.config

In a default installation this file is located in C:\Program
Files\QlikView\Publisher\ExecutionService. The app settings tag
is the part that can be modified. Read more about the snmp section on
page 125.

```
<appSettings>
   <!-- Defaults to
%PROGRAMDATA%\Qliktech\Publisher\ExecutionService -->
   <add key="ApplicationDataFolder" value=""/>
   <!-- The port the service listens to. Default
adress is http://localhost:8082/gtxs.asmx -->
   <add key="WebservicePort" value="8082"/>
   <!-- WebSever type ("system" (Microsoft http.sys)
or "internal")-->
    <add key="WebserverType" value="system"/>
   <!-- Security level (anonymous, ntlm and negotiate
being the most relevant) -->
    <add key="SystemSecurityLevel" value="ntlm"/>
   <!-- true to enforce group membership for access -
->
    <add key="AuthorizeAuthenticatedClients"</pre>
value="false"/>
   <!-- group name used if
"AuthorizeAuthenticatedClients" above -->
    <add key="AuthorizationGroup" value="OlikView</pre>
Administrators"/>
   <!-- Defaults to http://localhost:8083/qtds.asmx -
->
   <add key="DSCAddress" value=""/>
   <!-- Timeout in seconds for calls to the DSC-->
   <add key="DSCTimeoutSeconds" value="120"/>
   <add key="EnableSoapExtensions" value="true">
   <!-- NTFS File Progress in ms, default is 1000 ms-
->
   <!-- DMS File Progress in ms, default is 1000 ms-->
   <add key="DMS FileProgessEveryMilliSeconds"</pre>
value="1000"/>
   <!-- DMS File Buffer in bytes, default is 5242880
bytes-->
   <add key="DMS_FileOperationsBufferSize"</pre>
value="5242880"/>
   <!--Set to false to disable Soap Extensions. The
soap extensions are not supported on double-byte
platforms-->
   <add key="NTFS_FileProgessEveryMilliSeconds"</pre>
value="1000"/>
   <!-- NTFS File Buffer in bytes, default is 5242880
bytes-->
   <add key="NTFS_FileOperationsBufferSize"</pre>
value="5242880"/>
   <!-- Document data replacement settings when
```

```
generating filenames and paths. Character at find
position n corresponds to char at replace position n.
Find string length must be equal to replace length!-->
   <add key="IllegalDocumentCharactersFind" value="\/</pre>
"/>
   <add key="IllegalDocumentCharactersReplace"</pre>
value="__"/>
   <!-- Don't allow QlikView eninge to be started more
often than every n milliseconds. -->
   <add key="QlikViewEngineQuarantineTimeInms"</pre>
value="100"/>
   <!-- If possible, keep the Source Document opened
during the distribution. -->
   <add key="IfPossibleReuseDocuments" value="true"/>
   <!-- Setting this key to true will enable logging
of memory usage and stack trace on "Error" logging -->
   <add key="DebugLog" value="false"/>
   <!-- Setting this key to true will enable logging
used for debug. -->
   <add key="Trace" value="true"/>
   <!-- Enable calling the executionservice in batch
mode. -->
   <add key="EnableBatchMode" value="false"/>
   <!-- Set to true to generate QVW file(s)
(Distribution history and preview) -->
   <add key="EnableReports" value="true"/>
   <!-- Do not create Distribution History Report more
often than this value. Set to 0 to generate as often
as possible (that is, after a job has finished) -->
   <add key="ReportQuarantineSeconds" value="6"/>
</appSettings>
```

Directory Service Connector – QVDirectoryServiceConnector.exe.config

By default this file is located in C:\Program Files\QlikView\Publisher\DirectoryServiceConnector. Read more about the snmp section on page 125.

The tags mean the following:

ApplicationDataFolder

This is the folder where the log folder and all other files/folders will be created. The default value is C:\Documents and Settings\All Users\Application Data\QlikTech\DirectoryServiceConnector.

CacheExpiryInMinutes

This is the time in minutes that the DSC will keep user information in RAM. If you increase the value, the distribution could go faster if you distribute to the same user that has been distributed to before, but the RAM consumption of the DSC will increase.

WebservicePort

This is the port that the Directory Service Connector service will use to communicate with. The default value is 8083. If you modify that, you will need to modify the tag "DSCAddress" in the QVExecutionService.exe.config file too.

EnablePreloading

This will load all sub nodes of a node before checking it for recipients. Setting this to True can make distribution faster in some cases, e.g where you have a lot of recipients on the same node and all or most members of the node also are recipients. Previous versions of DSC, i. e. pre 8.20, has this hard coded as **True**.

PluginPath

This is the path where the DSC will look for available DSP plugins. The default value is C:\Program Files\QlikView\Publisher\DirectoryServiceConnector\DSPlugins.

WebserverType

This is the web server used. The default value is Windows web server. Use the value **internal** to use the QlikView Http Service.

SystemSecurityLevel

This sets the type of authentication. This setting is only applicable if the webservertype is set to system.

AuthorizeAuthenticatedClients

This sets whether the authenticated clients must be authorized as member of a certain group. The setting is not applicable if the **SystemSecurityLevel** is set to anonymous.

AuthorizationGroup

This is the name of the group to which the authenticated clients must belong, if the AuthorizeAuthenticatedClients is set to true.

EnableSoapExtensions

The Soap extensions used in QlikView Publisher are for logging and encrypting. They are set in the **Control Panel** under **Settings**, **Logging and Communication**. Set to False for double-byte languages, such as Japanese and Chinese, as they do not support these Soap extensions.

AccessPoint Website Web.config

This file is by default located in C:\Program Files\QlikView\Publisher\AccessPoint. The file has a number of tags but the only one that should be modified is the appSettings tag. It contains some configuration tags for communication and also all the text strings that will be displayed in the AccessPoint website.

```
<appSettings>
   <add key="AccesspointBackendIP" value="localhost"/</pre>
>
   <add key="AccesspointBackendPort" value="4994"/>
   <add key="PublisherResponsible" value="Publisher</pre>
Responsible"/>
   <add key="PublisherResponsibleEmail"</pre>
value="publisher.responsible@email.goes.here"/>
   <add key="GetUsernameFromHeaderForCustomUsers"</pre>
value="False"/>
   <add key="GetUsernameFromHeaderForWindowsUsers"</pre>
value="False"/>
   <add key="UserHeader" value="SM_USER"/>
   <add key="EnableChangePasswordForCustomUsers"</pre>
value="True"/>
   <add key="EnableLogoff" value="True"/>
   <add key="LoginUrl" value="login.aspx"/>
   <add key="LogoffUrl" value="logoff.aspx"/>
   <add key="ChangePasswordUrl"</pre>
value="changepassword.aspx"/>
   <add key="CustomRoleServiceURL" value="http://</pre>
localhost:8081/gtcc.asmx"/>
   <add key="qtcc.qtcc" value="http://localhost:8081/</pre>
qtcc.asmx"/>
   <add key="ApplicationDataFolder" value=""/>
   <add key="PleaseContact" value="Please contact "/>
   <add key="IfYouAreExperiencingProblems" value=" if</pre>
you are experiencing problems with the AccessPoint or
the documents published in it."/>
   <add key="YouAreLoggedInAs" value="You are logged</pre>
in as: "/>
   <add key="PageLastRefreshedAt" value="Page last</pre>
refreshed at: "/>
   <add key="DefaultCategory" value="Default</pre>
Category"/>
   <add key="OtherFiles" value="Other Files"/>
   <add key="FileSize" value="Size"/>
   <add key="LastUpdate" value="Last Update"/>
   <add key="NextUpdate" value="Next Update"/>
   <add key="Analyze" value="Analyze"/>
   <add key="RefreshDocumentList" value="Refresh</pre>
Document List"/>
   <add key="ClickToOpenInIETooltip" value="Click</pre>
here to open in Internet Explorer client"/>
   <add key="ClickToOpenInJavaTooltip" value="Click</pre>
here to open in Java client"/>
```

```
<add key="ClickToOpenInDownloadTooltip"</pre>
value="Click here to download"/>
   <add key="ClickToOpenInZFPTooltip" value="Click</pre>
here to open in Zero Footprint client"/>
   <add key="LogOnToAccesspoint" value="Log on to</pre>
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</pre>
username or password."/>
   <add key="CouldNotValidateBecauseConnection"</pre>
value="Could not validate user because connection to
Command Center failed."/>
   <add key="IllegalCharactersDetected"</pre>
value="Illegal characters detected in input."/>
   <add key="ConnectionToAccesspointServiceFailed"</pre>
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"/</pre>
   <add key="ConfirmNewPassword" value="Confirm New</pre>
Password"/>
   <add key="EnterOldPassword" value="Enter old</pre>
password"/>
   <add key="EnterNewPassword" value="Enter new</pre>
password"/>
   <add key="ClickToChangePassword" value="Click to</pre>
Change Password"/>
   <add key="Cancel" value="Cancel"/>
   <add key="ChangeFailedWrongPassword"
value="Password change failed due to supplying wrong
password."/>
   <add key="ChangeFailedConnectionFailed"</pre>
value="Could not change password because connection to
Command Center failed."/>
```

<add key="NewAndConfirmedDoesNotMatch" value="New</pre>

The tags that are related to communication are

AccesspointBackendIP

This setting is used for finding where the AccessPoint Service is located. The default is "localhost".

AccesspointBackendPort

This setting is used to set which port the AccessPoint website will use to communicate with the AccessPoint Service. The default value is 4994.

GetUsernameFromHeaderForCustomUsers

This is used to read your login credentials from the http header, instead of from the logged-in Windows User.

GetUsernameFromHeaderForWindowsUsers

This is used to read your windows login credentials from the http header, instead of from the logged-in Windows User. Be careful when using this setting since it potentially could be a security issue.

UserHeader

This is used to read your login credentials from the http header, instead of from the logged in Windows User.

${\tt Enable Change Password For Custom Users}$

This setting lets custom users change their password if set to true.

EnableLogoff

This is used to show the log off link in the AccessPoint.

CustomRoleServiceURL

This setting is used for locating where the AccessPoint shall look for the Command Center and the web service that handles Custom Users. The default value is http://localhost:8081/qtcc.asmx. If you run the

Command Center on a different machine or on a different port you need to modify this value.

qtcc.qtcc

This setting is an internal setting that is needed to create an instance of the web service that will be used. You should NOT modify this value, even if you change the Command Center location or port, leave it as is.

ApplicationDataFolder

This setting is not used, since the AccessPoint does not log anything to the default log position. It is kept there for future usage.

The following tags are for using customized log in functionality:

LoginUrl

This is the address to the customized log in page.

LogoffUrl

This is the address to the customized log off page.

ChangePasswordUrl

This is the address to the customized change password page.

AccessPoint Service QVPublisherAccesspointService.exe.config

This file is by default located in C:\Program Files\QlikView\Publisher\AccessPointService. It contains only one setting in the appSetting part that can be modified. Read more about the snmp section on page 125.

<appSettings>

<add key="ApplicationDataFolder" value=""/>

</appSettings>

The tag used is:

${\tt ApplicationDataFolder}$

This is the folder where the log folder and all other files/folders will be created. The default value is C:\Documents and Settings\All Users\Application Data\QlikTech\Publisher\ AccesspointService.

AccessPoint Service Settings.xml

This file is by default located in C:\Documents and Settings\All Users\Application Data\QlikTech\Publisher\Access-pointService. The reason this file is located there instead of under program files is that this file needs to be modified during runtime and the only

place where the Publisher has write access. The file contains the settings for which icons to show depending on the connecting client.

The content of the file are:

```
HighlightNotExecutedJobs="False"
HighlightThresholdMinutes="60">
      <ClientPriority>
        <ZeroFootPrint />
        <Plugin />
        <Java />
        <Download />
      </ClientPriority>
    </Listing>
    <!-- Pluginwindow OpenMode can be one of the
following -->
    <!--
           Root = File will open in the same window
as accesspoint -->
          Same = File will open in a new window, but
always in the same -->
    <!--
           AlwaysInNew = File will always be opened
in a new window -->
    <PluginWindow OpenMode="AlwaysInNew"
DisplayFileNameInTitleBar="True"
UseOvpLinksForPlugin="False" />
    <Communication ReceiveTimeout="60000"
SendTimeout="5000" DownloadBufferSize="100000" />
   </ClientSettings>
   <ServerSettings>
    <Logging LogRecieve="1" LogSend="1"
DebugLog="False" />
    <Listener IPAddress="127.0.0.1" Port="4994" />
    <Scanner CachedSimplifiedADSecurityMode="False">
      <AllowedExtensions>
        <Allow Extension=".qvw" />
      </AllowedExtensions>
    </Scanner>
    <Directories ProtocolPrefix="http://">
      <!-- Example AddDirectory statement -->
             <AddDirectory Path="d:\mydocuments\" /> -
->
      <!-- Example DenyDirectory statement -->
             <DenyDirectory Path="d:\mydocuments\" />
-->
    </Directories>
    <OlikviewServers>
      <AddQvs Port="4747" ProtocolPrefix="http://"
Machine="MJNX64" LinkMachineName="(FromRequest)"
DMSMode="False" ReadSettingsFromRegistry="True"
AlwaysUseFallbackKey="False"
RegistryBaseKey="HKEY_LOCAL_MACHINE\SOFTWARE\QlikTech
```

```
\QlikViewServer\Settings 7"
FallbackRegistryBaseKey="HKEY_LOCAL_MACHINE\SOFTWARE\
Wow6432Node\QlikTech\QlikViewServer\Settings 7"
PluginClientPath="(FromRegistry)" JavaClientPath="/
glikview/Java/
showdocument.asp?width=1000&height=700&docume
nt=" CustomPrefix="Custom\">
        <IPFilter>
          <!-- Example IPFilter statement -->
                 <Filter Mask="255.255.255.0"
Match="192.168.3.0" MachineName="mycustommachinename"
/> -->
        </IPFilter>
      </AddOvs>
    </QlikviewServers>
    <DirectoryServiceSearchPaths>
      <AddPath LdapPath="LDAP:" Username=""
Password="" />
    </DirectoryServiceSearchPaths>
   </ServerSettings>
</Settings>
```

The tags used are:

ClientSettings

Listing

This setting allows you to set the behaviour of the AccessPoint website.

StartExpanded

Sets whether Categories by default should be expanded or collapsed.

EnableClickOnRow

Sets if you should be able to click on the entire row rather than on the icon itself.

IEClientDefault

JavaClientDefault

DownloadDefault

HighlightNotExecutedJobs

This setting allows jobs that have not been run as scheduled to be highlighted. The default is False.

HighlightThresholdMinutes

This setting is the number of minutes that has to elapse after a planned execution, before that file is highlighted. The default setting is 60 minutes.

ClientPriority

This sets the priority for what client should open the file. Default values are first AJAX, then plug-in, java and lastly download..

PluginWindow

Has the following properties

OpenMode: This property sets how the files will be opened. The opening options are:

AlwaysInNew

Means that each link opens in a new window. This allows you to view multiple QlikView documents at the same time.

Means that the first link opens in a new windows but the following files will also open in that window. This means that you can only view one QlikView document at a time.

Root Means that the link will open in the same window as the Access-Point

Communication

This setting handles how the AccessPoint Service will communicate.

ReceiveTimeout

This is the timeout for the AccessPoint when receiving data. The default is 60000 milliseconds, or 60 seconds.

SendTimeout

This is the timeout for sending data from the AccessPoint

DownloadBufferSize

This is a setting for how large chunks of data will be sent in each package.

Server settings

Logging

This setting sets what will be logged: sent data, received data and debug information.

Listener

This setting locates where the AccessPoint Service will listen for calls from the AccessPoint Web site, which port and from where. There are three possible values:

127.0.0.1

This means that the service will only accept calls from the same system.

192.168.0.1

A specific IP address. This means that the service will only listen to this specific address.

0.0.0.0

Any IP address. This means that the service will accept communication from any IP address.

The default values are ip address = 127.0.0.1 and Port = 4994

Scanner

This setting is for how and what the AccessPoint Service will scan files.

IncludeOtherFiles

This setting is redundant and is left for legacy reasons only.

CachedSimplifiedADSecurityMode

Used for speeding up the process of listing the users files when using NTFS. This setting caches the access rights to increase access speed when using many files. The cache is updated when the document is changed in the Publisher and every thirty five minutes.

Allowed Extensions

This lists which file extensions will be listed in the AccessPoint. All files that are not .qvw will be listed in other files.

Directories

This tag allows you to add or remove directories that will be scanned.

ProtocolPrefix

This property lets you decided which protocol will be used to download the files. The default value is http.

AddDirectory

This tag adds the listed directory. Use this only if your QVS does not host the directory. Files located in a directory that is added with this tag is only available for download. Example: AddDirectory
Path="c:\QlickViewDocuments"/>

DenyDirectory

This tag removes all files located in the specified directory from the list of files on the AccessPoint. Example: Path="c:\QlickViewDocuments">. DenyDirectory has a higher priority than AddDirectory so if a directory appears in both add and deny, that directory will not be included.

OlikViewServers

This tag is used to keep track of which QVSs the AccessPoint should list files from. The AccessPoint Service will try to read the Windows registry from the machines listed here, so if you add a QVS on a different machine you will need to run the AccessPoint Service as a specified account and grant access to that account in the registry on the machine running the QVS.

AddQVS

This tag adds a specific QVS, It has a number of different properties:

Port

This property is the port that will be used to communicate with the OVS. The default is 4747.

ProtocolPrefix

This property sets which protocol will be used when creating links to the plugin and java pages.

Machine

The name of the machine running the QVS.

LinkMachineName

This is the link that will show up in the AccessPoint as the name that the link is pointing to.

DMSMode

This setting is used to show the mode of the QVS that is being used DMS mode = True means that the QVS handles security rather than Windows. For more information on how the QVS works in DMS mode please see the QVS reference manual.

ReadSettingsFromRegistry

This setting is used to activate or deactivate a registered QVS. Setting the value to **True** means that the QVS is active and being used. Setting the value to False will deactivate the QVS.

AlwaysUseFallbackKey

There are two places in the registry where the QVS can write information on a 64 bit version depending on whether you run it in 32 bit mode or not. By default the AccessPoint will try the Registry-BaseKey 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.

PluginClientPath

This setting is for where the AccessPoint will redirect requests to the Plugin. The default value is the path to showdocument.htm.

JavaClientPath

This setting is to point out where the Java client is located. The default is the location of **showdocument.htm**.

CustomPrefix

This is the text that will be appended the user name when running in DMS mode.

IPFilter

This setting makes it possible to use different machine names for the links for the plug-in and java clients depending on where the connection comes from. If no match is found the process defaults to the **LinkMachineName** setting.

DirectoryServiceSearchPaths

Sets which part of the Active Directory should connect to. Default value is LDAP

7.2 Triggering EDX Enabled jobs using the Execution Service

As a developer it is possible to directly call the Execution Service. The Execution Service exposes its interface as a web service named Webservicehelper2 at the default address http://localhost:8082/qtxs.asmx?WSDL.

The call to use is named RequestEDX2 (this call includes RunID, which Request-EDX does not do). The call accepts three parameters:

JobName or JobID The JobName (as specified in the Control Panel), or the JobID (guid).

QueueIfAlreadyRunning If true, the job will be queued for execution if it is already running

Password Optional password (as specified for the Job the Control Panel)

Code sample:

```
XS1.WebServiceHelper2 l_CurrentXS = new
XS1.WebServiceHelper2();
l_CurrentXS.Url = "http://localhost:8082/qtxs.asmx";
l_CurrentXS.UseDefaultCredentials = true; //
Important, or authentication may give "401"
XS1.RequestEDXResult l_RequestEDXResult =
l_CurrentXS.RequestEDX2("JobName", false, "");
System.Diagnostics.Debug.WriteLine(l_RequestEDXResult.StartJobResult);
```

Using the RunID, it's possible to request the status of the job. The status includes the current work being executed (the same information is written on the main screen in the Control Panel), Last Execution, Next Execution and a couple of more things.

Code sample:

```
XS1.XSJobExecuteStatus 1_XSJobExecuteStatus =
1_CurrentXS.GetJobStatus(1_RequestEDXResult.RunID.ToS
tring());
System.Diagnostics.Debug.WriteLine(1_XSJobExecuteStat
us.CurrentWork);
```

Finally, it's possible to abort the job using the call AbortJob2.

Code sample:

```
bool 1_Aborted =
1_CurrentXS.AbortJob2(1_RequestEDXResult.RunID);
System.Diagnostics.Debug.WriteLine("Aborted: " +
1_Aborted);
```

8 RECIPIENTS

Understanding how you set the right recipients for your distributed documents is one of the most important things in QlikView Publisher. The first step is to define a distribution resource, an AccessPoint for example, and which users will receive their documents on that resource.

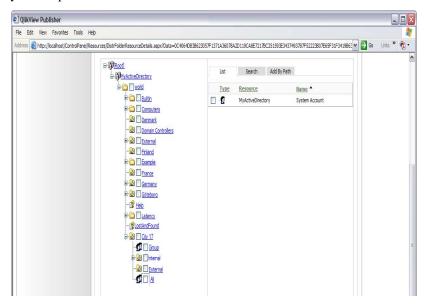
Then you need to select recipient on each task. At a first glance it may look like this is a double work, but it is not. A recipient on the resource answers the question, where will the user receive the distributed documents and is normally set only once and then remains unchanged. A recipient on a task answers the question who will receive the distributed documents and normally changes more often than the resource.

8.1 Finding recipients

There are three ways of finding the recipients you are looking for, **browsing**, **searching** or using **Add by path**. For **search** and **add by path** to work your Directory Service will need to support this functionality.

Browse

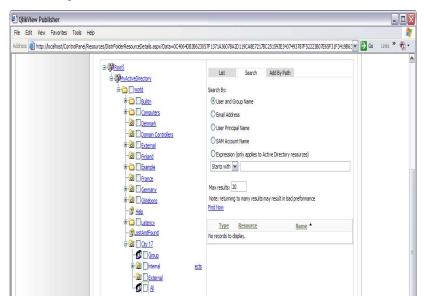
Using the **List** tab allows you to browse the Directory service tree and select your recipients.



Search

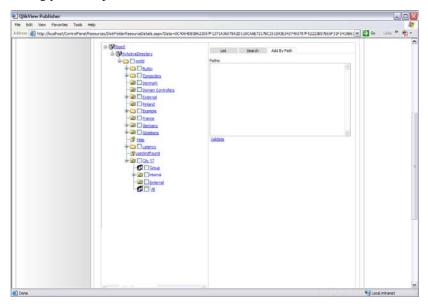
Using the **Search** tab you can search in the Directory Service. The search will be started in the node you select in the tree. You can search for User and Group name, Email address, User Principal Name and SAM account name. In Active Directory you can also search for an expression.

Search is one of the most commonly used functions for finding recipients in larger directory services. However it is important to notice that when you use **search** to find a recipient you will find the recipient in the recipient-tree based on their distinguished name. To search for multiple users use a semicolon as separator.



Add by Path

If you use Active Directory you can build an expression that will be used for adding your Recipients.



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.

8.2 How Recipients on a task are matched with recipients on a resource

When the Execution Service (XS) is performing a distribution task and is looking for recipients, it starts with using the position of the selected recipient in the directory service "tree", and checks if there is a matching resource with that recipient. The XS then moves one step up and searches for a distribution resource within that node. This is repeated until a match is made and in that case a distribution is done. If at the root node no match is made then no distribution is done since no recipient has been found. This is logged as a warning.

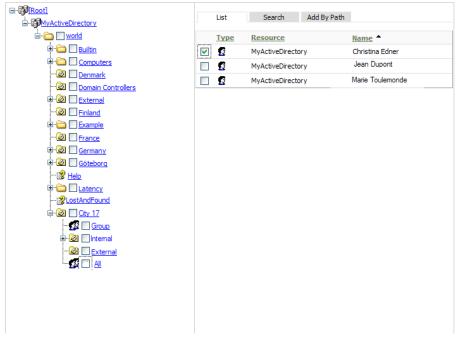
It's important make sure the marked recipient on the task is also checked in the Resource, either directly (one to one) or as part of the parent group(s). The usage can be compared to a Windows share, where access to a remote file system is granted if

the user has access to both the share, and the NTFS filesystem, either via the security groups or via the direct username. If they are checked in different places in the hierarchy, there will be no match and no distribution.

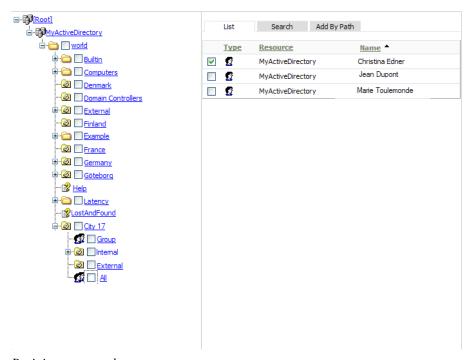
In a Microsoft Active Directory environment a search of recipients will yield a hit on an actual node only, never on a member of a security group. If the tree is trimmed down to only contain security groups, for example QlikView users only, a search will give no hits, as the actual nodes are not a part of that tree.

QlikTech recommends that the directory service tree only contains organizational units, preferably from the root of the directory.

Below are two screenshots showing how the recipients on a resource and a task should match..



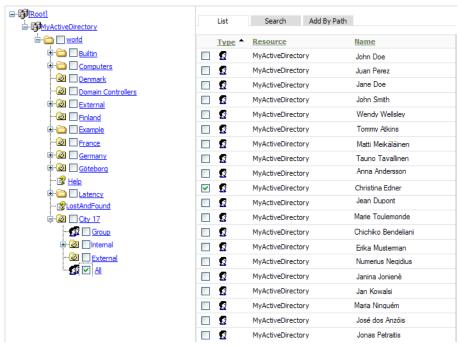
Recipients on a resource.



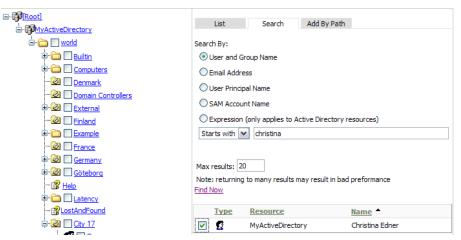
Recipients on a task.

71

Below are two screenshots showing how not to match recipients on a resouce and on a task.



Recipients on a resource.

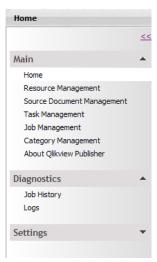


Recipients on a task using search.

9 DETAILED VIEW OF THE USER INTERFACE

9.1 Main Menu

The main menu is located on the left side of the screen. The part called Main is always available. The other parts will change based on where in the menu system you currently are.



Home page

The **Home** page lists the currently enabled jobs and allows you to view the content of the jobs, view the logs from the latest execution and also to start a job by using the **Run Job** link.

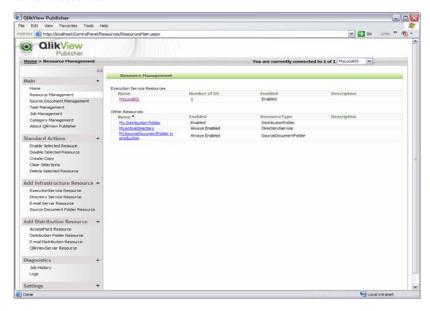


Note Using the link **Run job** now will NOT impact the given schedule of a job.

This page refreshes automatically every 30 seconds to show the current status.

Resource Management

The **Resource Management** view allows you to add, remove and edit your current resources.



Since it is the most important resource and changing it will change the resources you see, the XS is listed at the top. The Execution Service Resource lists the currently used Execution Service Group and how many XSs are in it.

Standard Actions

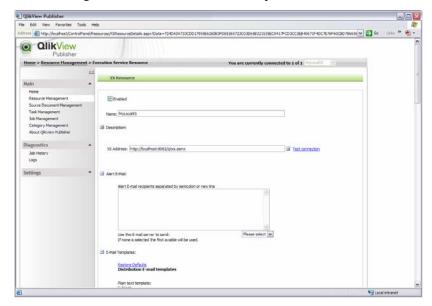
Standard actions allow you to copy, delete, enable or disable resources. Select one or many resources in the main frame by clicking on the name, CTRL+click on a second resource will select both.

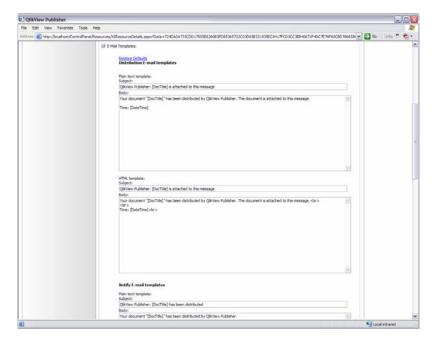
Add Infrastructure Resource

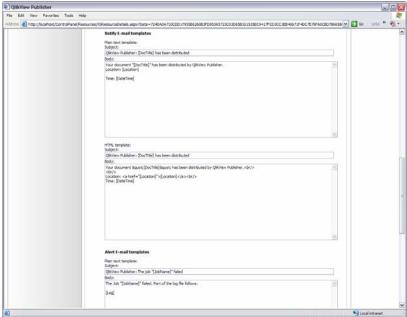
Infrastructure resources are all the resources that are needed for the QlikView Publisher to prepare the distributed documents.

Execution Service Resource

The Execution Service (XS) is a Windows service with a built in http server. The XS is one of the cornerstones of the QlikView Publisher installations. The following screenshots show all available options of the XS.







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Enabled

Enables or disables an XS. Disable an XS so that its settings are not lost, as they would be if you deleted it.

Name The name of the XS. All names must be unique within the Publisher installation.

Description

To help identify this resource.

XS Address

The URL where the XS is located. By default the value is http://local-host:8082/qtxs.asmx

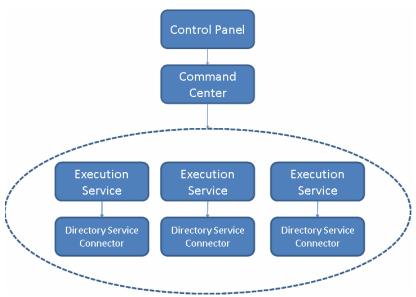
Execution Service Groups

To create a group of Execution Services for load balancing and redundancy, click the plus sign after the **XS address**. This adds another row for a new XS. You can add as many as necessary. These Services will work together load balancing the jobs.

The election process to decide which service will execute the job is as follows:

Each service is installed with a certain time delay as to when they will check for a job, e. g. if a job is set for 10:00:00, one service is set to check at 09:59:45, one at 09:59:50, one at 10:00:02, and so on. The service to first "wake up", queries the others to see if they are set to take on a job now and when no other service is, the first service executes the job and then lets the other services know it is done. This last communication is to ensure that the job gets done. If the other services do not hear anything, they assume the first service has gone down and the election process starts anew.

See below the recommended configuration for Execution Service Groups.



In a default installation a XS works with one Directory Service Connector. If you have several Execution Services, we recommend that you use one DSC per service to avoid single point of failure. There is at the time of writing no load balancing between the DSCs.

Job Report Server

The QlikView Server that will host the reports created by QlikView Publisher.

Use QlikView Server Resource

Choose the QlikView Server Resource to be used as Job Report Server

Specify QlikView Server

A QlikView Server that is not registered as a Resource can also be used as Job Report Server.

Report QVS Address

This setting is the address of the QVS on the network.

Report client files target

The folder that is the tharget folder, to which all reports will be distributed.

Report client files url

This setting is used to create the links for the web server that is hosting the report files. You need to manually set up this website and make sure that it has matching security settings with your QVS. .

Alert Email

Alert emails are sent to the recipients listed here if a job fails. For more information about Alert email, see below.

Email templates

Each template is available in HTML and Plain Text version. These templates define what message will be sent when the following events occur:

Distribution email

When an email distribution is made this is the text in the email with the attached file.

Notify email

When the resource has been set up to notify the recipients that their documents have been updated, this email is sent.

Alert email

When a job fails this mail is sent out to the registered recipients of Alert emails.

Advanced

This option contains settings concerning Section Access, Workorder, log files, communication and QVB settings.

Send Workorder

This will manually send the workorder from the Command Center to the connected XSs.

Section Access

This setting allows you to select what username and password the XS will use when opening QlikView documents. The default value is that the XS will use the Windows credential. This is what is matched in the example on how to use Section Access together with QlikView Publisher.

Use false positives on subgroups

This setting is used for deciding if the nodes on the recipient tree shall query the underlying nodes if they have subgroups, and display a + sign in that case or, if you use false positives on subgroups, the + sign will appear on all groups and not until you try to expand it will it check for subgroups.

Logging

The XS can log status into an internal log file or into the Windows Event Viewer. This setting allows you to decide which information goes where and for how long the internal log files should be kept.

Communication

These settings decide how the XS will communicate over http.

OnLineIsAliveRecheckSeconds

This property sets how many seconds passes between the XS checks if it is still online, if its current status is online, i.e. connected to the Command Center.

OnLineRetrieveMessagesSeconds

This property sets how often the XS will look for messages, i.e., listen to if anyone is trying to communicate with it, when its current status is online, i.e. connected to the Command Center.

OffLineIsAliveRecheckSeconds

This property sets how many seconds passes between the XS checks if it is still off line if its current status is off line, i.e. not connected to the Command Center.

OffLineRetrieveMessagesSeconds

This property sets how often the XS will look for messages, i.e., listen to if anyone is trying to communicate with it, when its current status is not connected to the Command Center.

QlikView engines (QVB.exe)

This setting decides how the XS handles the QlikView Batch.

Max seconds at zero CPU

When a QVB process has zero cpu usage it could be hung but it can also be in a state where it has passed a query to the data source and the answer has not yet come back. This property decides how long the XS will wait with a QVB at zero cpu usage before deciding it is a hung process and kill it thus ending the task it was currently assigned to. This event is logged in the log file.

Max number of simultaneous QlikView engines for distribution

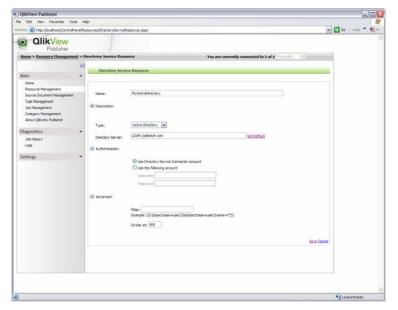
This property decides how many QVBs the XS shall be able to have running jobs simultaneously. Increasing this value from the default 4 is possible based on the complexity of each job being done.

Max number of simultaneous QlikView engines for administration

This property decides how many simultaneous QVBs the XS shall be able to use for the Control Panel for things like preparing and setting up tasks and jobs.

Directory Service Resource

The Directory Service resource handles all communication with the user repository. A default installation of QlikView Publisher 8.50 handles Active Directory, Windows NT, Local users and Custom Users. For other providers you will need to write your own Directory Service Provider (DSP). For more information on how that is done please see the DSP interface chapter.



Name The name of the Directory Service. All names must be unique within the Publisher installation.

Description

To help identify this resource.

Type The available Directory Service Providers will be listed here.

Directory Server

This setting is for deciding which part of the User repository will be used. Clicking Get Default will get you the root of the current directory service.

Authentication

This setting allows you to use a different account that the one running the Directory Service account.

Advanced

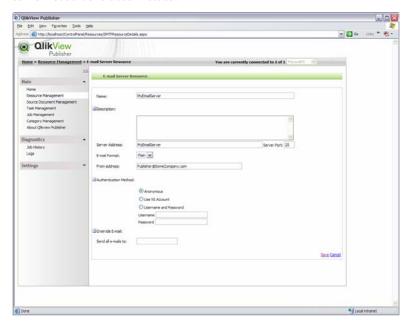
Filter This setting allows you to set a filter that will limit what the DSP will return. For this to work the filter applied needs to be understood by the DSP.

Divider at

This setting decides how many nodes will be listed on each page.

Email Server Resource

The Email server resource is used for distributing files, send alerts and notifications. To be able to execute alerts set in a QlikView document, all fields must be completed. The fields for e-mail server, user, password and from are ignored in the document and the information from the Publisher e-mail server resource is used instead.



Name The name of the Directory Service. All names must be unique within the Publisher installation.

Description

To help identify this resource.

Server Address

The address of the Email Server on the network.

Server Port

The port that the email server uses to communicate on.

Email format

This setting decides which of the formats, plain text or html, the email server will use when sending emails.

From address

This is the address that will be put in the field From in the email.

Authentication mode

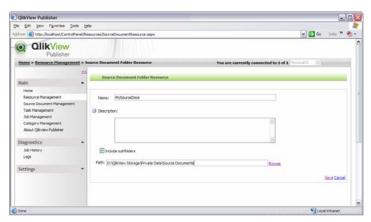
This setting decides how the XS will authenticate itself against the email server.

Override Email

This setting allows for sending all emails to this specified address instead of the actual recipient. This is a useful setting during test etc but should not be used in a live environment.

Source Document Folder Resource

The Source Document Folder is used to control from where Source Documents are included in the QlikView Publisher. As of version 8.20 you can now include subfolders.



Name The name of the Source Document Folder. All names must be unique within the Publisher installation.

Description

To help identify this resource.

Include subfolders

This property will include the subfolders to the selected folder. Please note that in an upgraded installation this option will be unchecked, since it could lead to unexpected results if it were automatically checked. Of course you can change it manually.

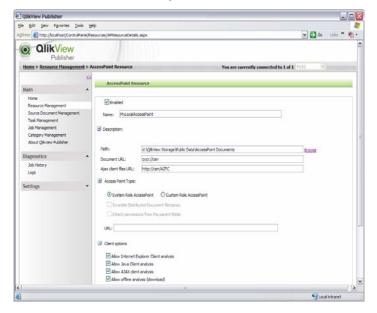
Path The path to the folder where the source documents are located. The recommended way of setting up the folder is to use UNC paths rather than using mapped drives.

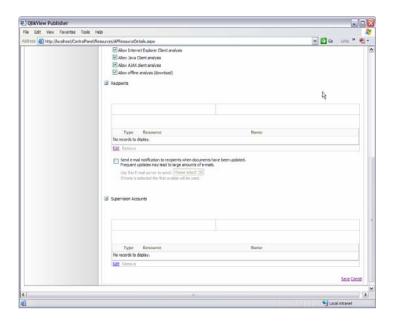
Add Distribution Resource

Distribution resources are used to get the distributed documents to the endusers.

AccessPoint Resource

The AccessPoint is a web portal that lists the documents that each user has access to. It is important to understand that the AccessPoint only links to each document, it does not host the documents themselves, that is done by the QVS.





Enabled

Set the resource to be disabled to block it from receiving files without deleting it.

Name The name of the AccessPoint Resource. All names must be unique within the Publisher installation.

Description

To help identify this resource.

Path The folder that is the target folder, to which all files will be distributed. If you have subfolders to this folder they will be included in the file listing.

Document URL

This setting is used for locating where the distributed file is located within the QlikView Server that will host it for the Ajax Zero Foot Print Client (AJAX ZFC). If the file is located in the root of the QVS the link would be qvp://<MachineName>. This setting is only used for Ajax Zero Foot Print Client distribution.

AJAX Client Files URL

This setting is used to create the links for the web server that is hosting the AJAX ZFC html files. You need to setup this website manually and make sure that it has matching security settings with your QVS. For an IIS that

means you should use Windows Integrated security and uncheck the Allow Anonymous access checkbox.

Note The Internet Information Server hosting the AJAX client pages needs to be installed on the same computer as the QlikView Server.

AccessPoint type

This setting switches between the modes System User and Custom User. The main difference is that Custom Users will not have any Windows security on the distributed files.

Use Scrambled filenames

This is a property that can be set for an AccessPoint in Custom User mode where the distributed documents will receive a filename that is scrambled and very difficult to guess.

URL This setting is used in the Notification email that is sent out when a document has been distributed.

Client Options

This setting decides what flavors of QlikView clients should be allowed on the AccessPoint.

Recipients

This setting is used to select who will receive their distributed documents on this AccessPoint.

Email Notification

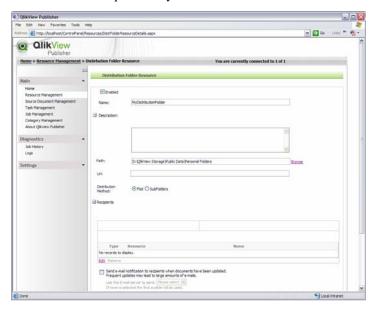
This property allows for sending an email to each recipient of a document.

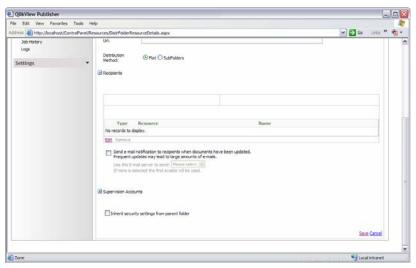
Supervision account

This setting allows you to specify Supervision Accounts that will have full access to all distributed documents on this AccessPoint.

Distribution Folder Resource

The Distribution Folder Resource is a folder where the recipients can access their files. Each file will be written with NTFS security for the recipients only.





Enabled

Set the resource to be disabled to block it from receiving files but without deleting it.

Name The name of the Folder Distribution Resource. All names must be unique within the Publisher installation.

Description

To help identify this resource.

Path The folder that is the target folder, to which all documents will be distributed.

URL This setting is used in the Notification email that is sent out when a document has been distributed.

Distribution method

This setting switches between the two modes Flat and Subfolders. Flat distribution means that all files end up in the same folder. Subfolders will create one folder for each recipient. These subfolder are created automatically by the Execution Service and are given NTFS rights to allow only each recipient access.

Recipients

This setting is used to select who will receive their distributed documents on this Distribution Folder Resource.

Email Notification

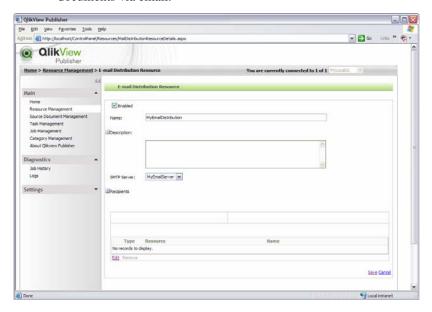
This property allows for sending an email to each recipient of a document when it has been updated.

Supervision account

This setting allows you to specify Supervision Accounts that will have full access to all distributed documents on this Distribution Folder Resource.

Email Distribution Resource

The Email Distribution Resource allows you to send the distributed documents via email.



Enabled

Set the resource to be disabled to block it from receiving files without deleting it. Name

The name of the Email Distribution Resource. All names must be unique within the Publisher installation.

Description

To help identify this resource.

SMTP Server

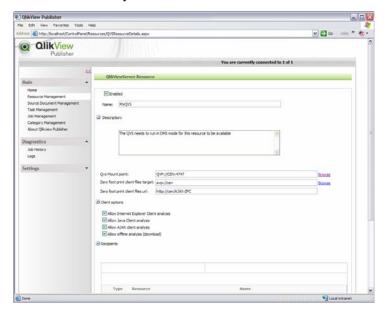
The Email distribution will use this email server when sending email.

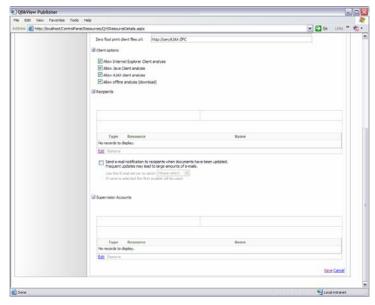
Recipients

This setting is used to select who will receive their distributed documents on this Email Distribution Resource.

QlikView Server Resource

The QlikView server Resource allows you to communicate directly with a QVS running in DMS mode. If the QVS is not running in DMS mode you will not be able to add it as a resource.





Enabled

Set the resource to be disabled to block it from receiving files but without deleting it.

Name The name of the QlikView Server Resource. All names must be unique within the Publisher installation.

Description

To help identify this resource.

QVS Mount Point

This setting is the address and port of the QVS on the network.

Document URL

This setting is used for locating where the distributed file is located within the QlikView Server that will host it for the Ajax Zero Foot Print Client (AJAX ZFC). If the file is located in the root of the QVS the link would be qvp://<MachineName>. This setting is only used for Ajax Zero Foot Print Client distribution.

AJAX Client Files URL

This setting is used to create the links for the web server that is hosting the AJAX ZFC html files. You need to manually setup this website and make sure that it has matching security settings with your QVS. For an IIS that means you should use Windows Integrated security and uncheck the Allow Anonymous access checkbox.

Note The Internet Information Server hosting the AJAX client pages needs to be installed on the same computer as the QlikView Server.

Client Options

This setting decides what flavors of QlikView clients should be allowed on the AccessPoint that this QVS is hosting.

Recipients

This setting is used to select who will receive their distributed documents on this OlikView server Resource.

Email Notification

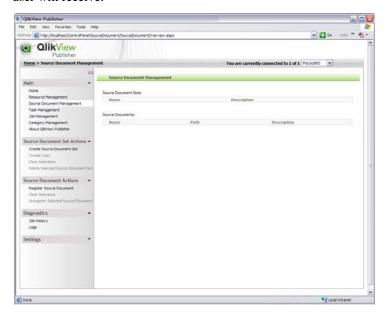
This property allows for sending an email to each recipient of a document

Supervision account

This setting allows you to specify Supervision Accounts that will have full access to all distributed documents on this QlikView Server Resource.

Source Document Management

The source document management page allows you to register those source documents that will be the basis for the distributed documents that the enduser will receive.



Description

To help identify this resource.

Source Document Folder Resource

The different Source Document Folders that are registered will show up here.

Source Document

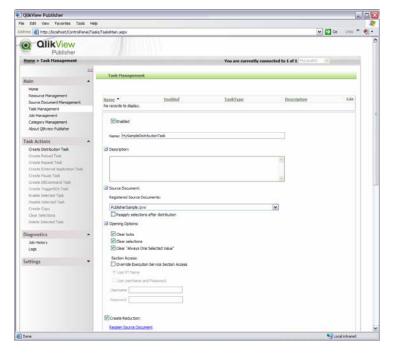
The source documents that are located in the selected source document folder will be listed here. You can use Shift + Click and Ctrl + Click to select multiple source documents at once.

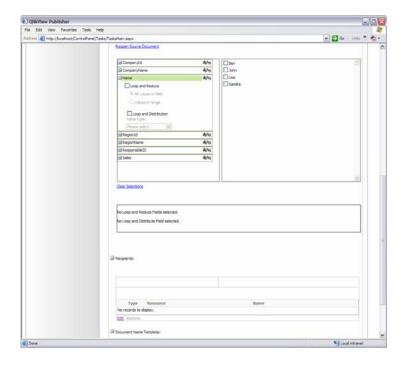
Task Management

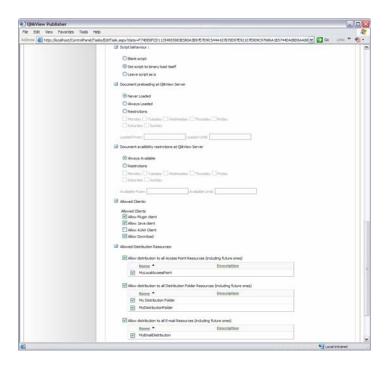
Create Distribution Task

The Distribution Task is one of the most important pieces of the Publisher functionality. It allows distribution of documents to either

recipients specified at the task setup or at runtime (Loop and Distribute)







Enabled

Set the task to be disabled to block it from running without deleting it.

Name The name of the task. All names must be unique within the Publisher installation.

Description

To help identify this task.

Source Document

The source document that will be used as a basis for the distributed documents.

Reapply Selections after distribution

Check this to try to reapply the selections that was made in the source document. However, based on what reductions have been made it is possible that the data needed to make the selection is no longer present in the file.

Clear locks

Check this to clear any locks that are present in the source document before the distribution is done.

Clear selections

Check this to clear any selections made in the source document before it is distributed.

Clear "Always one Selected Value"

Check this to clear the property "Always one selected value" in the source document before it is distributed.

Override Execution Service Section Access

Allows you to specify a different username and password for the Section Access in the Source Document for just this task.

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.

Reopen Source Document

Clicking this link will reopen the source document. This can be useful if you encounter some problem with the opening of the source document.

Clear Selections

This clears any reductions that have been setup.

Recipients

This setting is used to select who will receive the distributed documents. Please note that if you use Loop and Distribute you do not need to enter any Recipients using this control.

Document Name Template

Creates the name of the distributed document. See below for more information on how to use it.

Script behavior

Blank Script

This will remove the entire script from the distributed document.

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 document.

Document preloading at QlikView Server

Sets the preloading on the QlikView Server.

Document availability restrictions at QlikView Server

This sets the times when the distributed document will be available on the OlikView Server.

Allowed Clients

This setting decides what flavors of QlikView clients should be allowed on the AccessPoint or QVS.

Allowed Distribution Resources

This setting decides what type of resources this task shall be allowed to be distributed to.

Loop and Distribute is a distribution based on the values of the field. The field must contain values that correspond to the dropdown 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.

Preview

The **Preview** goes through all the steps of the distribution task, except the actual distribution to disk, in a non-live mode. The infomation is presented in a QlikView document. In order to access this page, a QlikView Server must have been set as **Job Report Server**. This is done on the **XS Resource** page of the **Control Panel**.

Note It is not possible to view a preview if the task is already running.

How to use Document Name Template

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

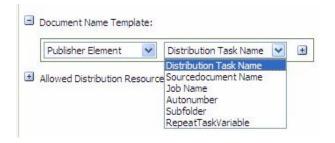
Document Field value

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

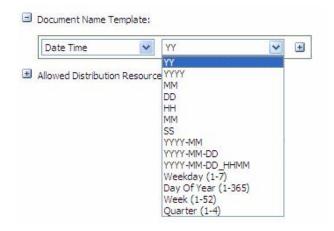
This will create a subfolder with the name you specify.

Repeat Task Variable

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



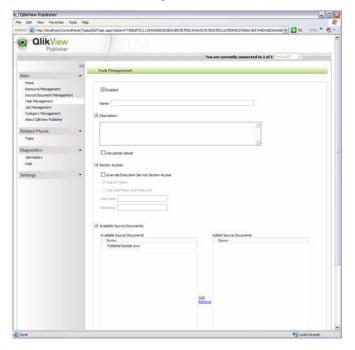
This names the file with the value of the field from your QlikView Document.



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

Create Reload Task

The reload task will run the script of the selected QlikView document, thus reloading the data.



Enabled

Set the task to be disabled to block it from running without deleting it.

Name The name of the task. All names must be unique within the Publisher installation.

Description

To help identify this task.

Use Partial reload

This allows you to use the partial reload functionality of QlikView.

Section Access

This allows you to override the Section Access that the Execution Service will use for this task only.

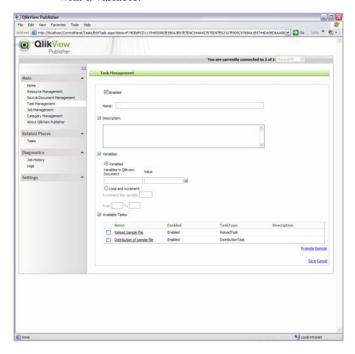
Available Source Documents

Select which Source document to reload.

Create 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.



Enabled

Set the task to be disabled to block it from running without deleting it..

Name The name of the task. All names must be unique within the Publisher installation.

Description

To help identify this task.

Reload variables

The values of the variable that will be passed to the Source Documents on each iteration. The number of iterations is controlled by the number of values of the variable, i.e. one iteration per value.

Available tasks

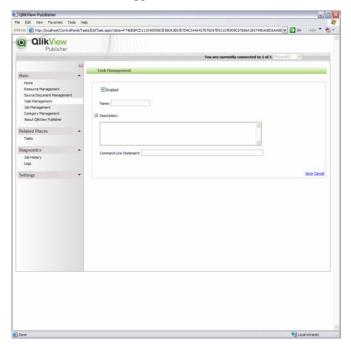
The tasks that the Repeat task will contain.

Promote/Demote

Sets the order of execution within the Repeat task.

Create External Application Task

An External Application task executes a command line statement.



Enabled

Set the task to be disabled to block it from running without deleting it.

Name The name of the task. All names must be unique within the Publisher installation.

Description

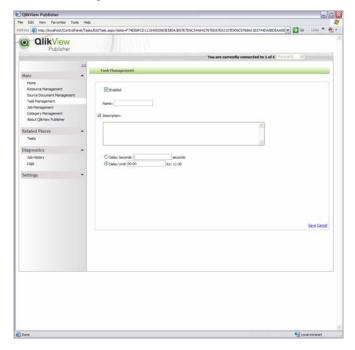
To help identify this task.

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.

Create Pause Task

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



Enabled

Set the task to be disabled to block it from running without deleting it.

Name The name of the task. All names must be unique within the Publisher installation.

Description

To help identify this task.

Delay Seconds

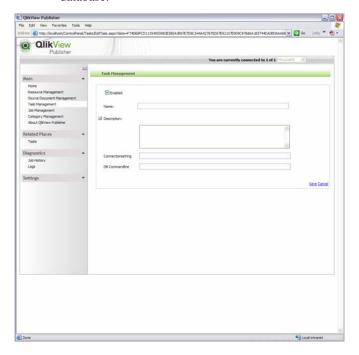
This will pause for n seconds.

Delay Until

This will pause until the specified time.

Create DbCommand Task

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



Enabled

Set the task to be disabled to block it from running without deleting it.

Name The name of the task. All names must be unique within the Publisher installation.

Description

To help identify this task.

Connection string

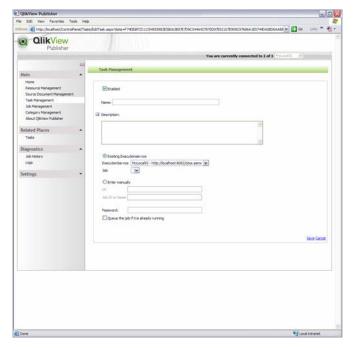
The connection string that will be used for connecting to the database.

DB Command line

The statement that will be executed. This can be any command that the database will recognize (stored procedures or SQL statements).

Create Trigger EDX Task

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



Enabled

Set the task to be disabled to block it from running without deleting it.

Name The name of the task. All names must be unique within the Publisher installation.

Description

To help identify this task.

Existing Execution Service

This lists all registered XSs 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 yet installed.

Password

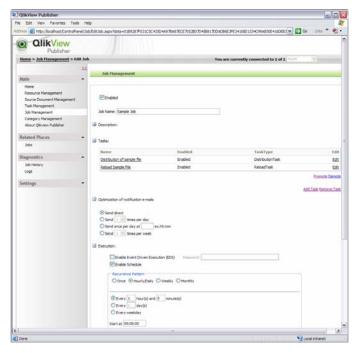
The password needed for triggering the job.

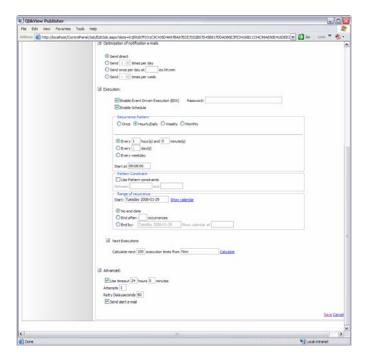
Queue the job if it is already running

The default value is to not queue the job.

Management

The Jobs of QlikView Publisher 8.50 are core items for executing tasks. The Jobs contain different tasks and are either executed on a schedule or through Event Driven Execution (EDX).





Enabled

Set the job to be disabled to block it from running without deleting it.

Job Name

The name of the job. All names must be unique within the Publisher installation.

Description

To help identify this job.

Tasks This control allows you to add, remove and modify the tasks that will be included in the job.

Optimization of notification emails

This setting decides how often notification emails are sent.

Execution

Here you decide how often the job will be executed.

Enable Event driven execution

This property allows the job to be available for event driven execution, either through EDX Task, the Request EDX URL or through a direct web service call to the XS.

Password

This password is a very basic way of ensuring security on the event driven execution. The password will be sent in clear text. The password is mainly a legacy from previous versions where the user profile EDX User did not exist.

Enable Schedule

This property decides whether the job will run a schedule or if it is only event driven.

Recurrence pattern

This setting allows you to set when and how often the job will be executed.

Use Pattern Constrains

Use this setting to limit when a job is being executed. For example, to execute a job once every hour between 8 and 16, you should set it to: Between 08:00 and 16:00.

Range of recurrence

This setting decides for how long the execution of the job will go on.

Next execution

This control allows you to verify that the schedule that you have created really is the correct one, by displaying when future executions will occur.

Timeout

This property is used for deciding a time limit when the job will be terminated if it has not yet been finished.

Attempts

This property is used for deciding how many times a job will be attempted.

Retry delay seconds

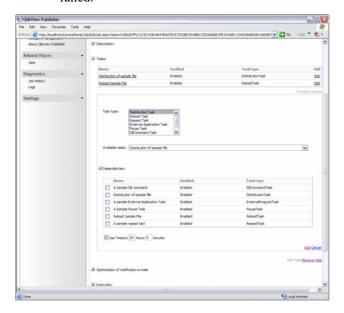
This property decides for how long the XS will wait between the attempts.

Send Alert email

This property decides if an alert email shall be sent if the job fails.

Dependencies

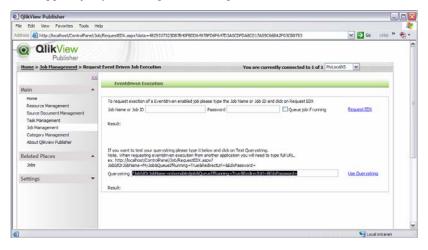
Dependencies in QlikView Publisher are used to make sure that tasks are not run if they are dependent on another task that has failed.



When including a task into a job you can select which other task, not necessarily in the same job, that this task shall be dependent on. When a task that has a dependency is about to be executed it will check the status of the dependee and if that status is failed the current task will not be executed.

Request EDX

The page request EDX can be used for two purposes: creating and testing a URL that will be used later on by another user to request the triggering of the event driven execution, or to trigger a job yourself right now using EDX.



Job Name or Job Id

The name or ID (the id can be difficult to obtain so you would normally use the job name) of the job that will be executed.

Password

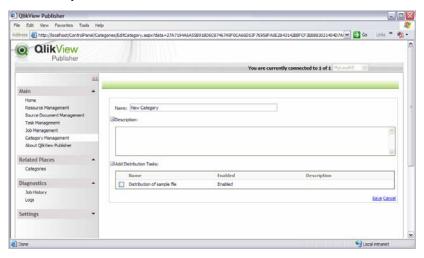
This password is a very basic way of ensuring security on the event driven execution. The password will be sent in clear text. The password is mainly a legacy from previous versions where the user profile EDX User did not exist.

Queue job if running

This property is used for letting the XS know how it should handle the case if the requested job is already running when the request comes in.

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.



Name The name of the category. All names must be unique within the Publisher installation.

Description

To help identify this category.

Add Distribution Tasks

The available distribution tasks are listed here. Check the ones you want to included in your category.

Reloading a task from the command line

The following value in executionservice.exe.config needs to be set to true:

<!-- Enable calling the executionservice in batch mode. -->
<add key="EnableBatchMode" value="false"/>

The following parameters are used for reloading:

-r Run in batch mode. Reload and quit.

-rp Run in batch mode. Partial reload and quit

-datapath Sets the home directory of the Execution Service. The

temporary files and logs of the Execution Service are saved here. Default is %APPDATA%\QlikTech\Pub-

lisher

-batcherrorfile Sets the path and filename for the error log

The syntax is:

```
QVPublisherExecutionService.exe -
r=d:\myapps\document.qwv -datapath=d:\logfiles -
batcherrorfile=d:\errorlog.txt
```

This will reload the document document.qwv and set the home directory to d:\log-files where the Execution Service files will be written. The errorlog.txt will be saved in d:\ if the reload is unsuccessful.

Note Alerts will not be triggered via a command line reload.

Example of a batcherrorfile:

Reload Failed

The Source Document was NOT reloaded successfully. DocumentPath=d:\myapps\document.qwv. Errors 1: Syntax Error, ScriptErrorList: Syntax Error, ScriptErrorDetails=Unknown statement.

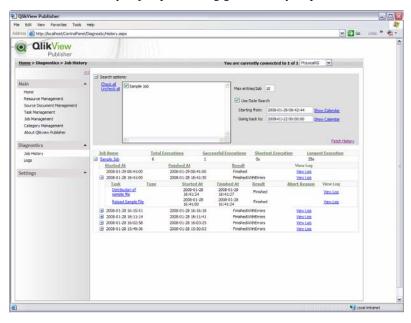
9.2 Diagnostics

Analyze Job History

The analysis lets you viewthe status of the run jobs and tasks. The document is continually reloaded and the information is kept up to date. In order to access this document, a QlikView Server must have been set as **Job Report Server**. This is done on the **XS Resource** page of the **Control Panel**.

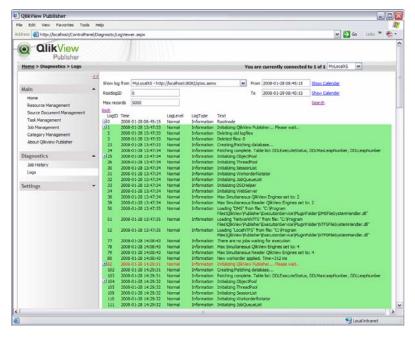
Job History

Job history lets you view historical information about average execution time etc. It also lets you jump to the log generated by a specific execution.



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

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.



Show log from

Here you select **Command Center** or the XS you want to view the log for.

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 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.

9.3 Settings

General Settings

This page lets you decide how long the log files that make up the job history are kept on disk before they are deleted.

User Profiles

QlikView Publisher 8.50 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 8.50 contains three different User Profiles: Administrators, Power Users and EDX-enabled 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. An EDX-enabled User only has access to the webpage that triggers EDX but no other part of the Control Panel.

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

Repository Settings

Database: The current QlikView Publisher Repository (QVPR) is listed here. For an XML repository only the name is stored. This name matches a folder under the Command Center, located by default at C:\Documents and Settings\All Users\Application Data\QlikTech\Publisher\CommandCenter

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.

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.

Logging and Communication

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

License Info

This page lets the administrator edit the 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 XSs.

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.

Organization

The organization to which the license belongs.

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 \ C:\Documents and Settings\All Users\Application

Data\QlikTech\Publisher\CommandCenter directory in the folder labeled Publisher LEF. The LEF file itself is called Publef.txt.

10 THE DIRECTORY SERVICE PROVIDER INTERFACE

This chapter will examine all relevant interfaces, their methods and properties and make notes on implementation details where due. The chapter is aimed at users with programming experience.

The reason for developing a DSP of your own is to be able to use QlikView Publisher to distribute QlikView documents to users in a directory service not supported per default today.

IDirectoryServiceProvider

This is the interface of the class that should plug into the framework. The members are as follows:

```
LogMessage LogMessageEvent { set; get; }
```

Directly after construction this field will be instantiated with a delegate providing crude logging facilities.

```
string Name { get; }
```

A free-form, preferably somewhat descriptive, name for the component suitable for the end-user.

```
string Type { get; }
```

An installation-unique identifier used internally by the framework and related components. The identifiers used by the supplied providers are: AD, NT. Local and Custom.

```
int MajorVersion { get; }
```

The major version number is stored to be used with the upgrade methods (see below).

```
int MinorVersion { get; }
```

The minor version number is stored to be used with the upgrade methods.

```
IContainer CreateRoot (IContainer _parent, string _path,
string _username, string _password, string _filter);
```

Should create a node representing the corresponding directory service node at the specified path. The returned node is considered the root within the domain of the loaded plug-in, although is has a parent (supplied as the first parameter of this method). Upon failure, an exception should be thrown.

```
List<string> GetAvailableDS ();
```

The list returned should contain one or more viable paths for the methods above and below. The list is what is shown when the end-user clicks **Get Default**.

```
IDSItem RawLookup (string _path, string _username, string _password);
```

A lookup into the underlying directory service, devoid of any prerequisites on behalf of the instantiated provider used. As used by the framework, the parent field of the returned item does not need to be initialized. Upon failure, an exception with a descriptive message should be thrown.

```
LogonInfo GetLogonInfo (IDSItem _item);
```

This method is used by the QlikView Publisher AccessPoint to get SID and logon name to match its authenticated user and file system permissions, respectively. If the directory service has no mapping to these, null should be returned.

```
XmlDocumentFragment GetFileSystemSecurity (string
_filesystem, string _idpath);
```

The xml fragment returned should be in a format understandable by the file system plug-in for the specified file system. See end of chapter for xml specifics regarding filesystems supported by the default installation.

```
void ClearCache ();
```

If the implementation keeps a cache, a call to this method should clear it.

```
bool SuffixMatch (string _name);
```

Returns true if the parameter matches any, or the only, known suffix. To some, suffix is also known as domain name.

```
int ChildrenPageSize { set; }
```

No container should ever return more children than this number. If it in fact has more children, use a layer of containers with **expander** set as type to split them up in an approved way.

```
int MemberPageSize { set; }
```

Similar to the field above, but expanders are not used for children. Instead they are always requested by a page number from the container.

```
string PrimarySuffix { get; }
```

In the list of recognized suffixes (or domain names), this method should return the one regarded as primary.

```
Dictionary<string, string> GetSettings ();
```

The dictionary of supported settings has name of setting as key and name of type as value.

```
void SetSetting (string _name, string _value);
```

The parsing responsibility is obviously set on the provider.

```
string GetSetting (string _name);
```

Return the named setting as a string, or throw an exception if it does not exist.

```
bool UpgradeNeeded (int _major, int _minor);
```

If the database has ids stored acquired from a provider of the given version, do they need to be upgraded?

```
List<string> Upgrade (List<string> _ids, int _major, int
minor);
```

Attempt to upgrade the given list of ids from a provider of the given version. Unmodified ids should still be returned, but ids that are not found should not. That is, the length of the input list and the list returned might differ.

IDSItem

This is a common base interface for IContainer and IMember, and they are the ones to be implemented by any class that will be instantiated.

IDSItem as parameter or return type is just a way of allowing either IContainers or IMembers to be passed.

```
Dictionary<Enumerations.eExtendedField, Object> Extend-
edFieldList { get; }
```

Some non-standard fields can be of interest for the file system plug-in for example. Today, the only supported extended field is SID.

```
string Id { get; }
```

The id of the node, that, due to limitations elsewhere, must be a string representation of a GUID (as in **System.Guid.ToString** ()).

```
string FullIDPath { get; }
```

The id followed by the parent's **FullIDPath**, separated by a backslash. If the parent field is not initialized (see **RawLookup** above) only the id is returned.

```
string Name { get; }
```

The common name of the node in the directory service.

```
string Description { get; }
```

Free-form description of the node, currently not used at all. But, a file system plug-in using it in some way is not totally unfathomable.

```
bool IsEnabled { get; }
```

A disabled node is still shown in the user interface, but nothing will be distributed to it.

```
Enumerations.eDSObjectType ObjectType { get; }
```

A more detailed classification of the node type than just 'container' or 'member'. Attentive readers may or may not notice a slight resemblance to the objectclass property in active directory.

```
Enumerations.eSupports Supports { get; }
```

Actions that the node supports, typically searching and distributing on a container and the latter only on a member.

```
string Path { get; }
```

The path to the node in the underlying directory service's language.

```
string AccountName { get; }
```

If present, this is the account name associated with the node.

```
IContainer Parent { get; }
```

The parent of the container.

```
List<IContainer> MemberOf ();
```

A list of all the groups the node is member of (the **memberof** attribute in active directory lingo).

```
List<string> EmailList ();
```

All, if any, email-addresses associated with the node.

IContainer

An important caveat when implementing a directory service provider is that containers and members in a publisher sense do not necessarily map to the structure of the underlying directory service. Using active directory as an example, any user (e.g. objectclass user or contact) makes out a member in the provider no matter if it is found as an actual node or only as a member attribute. In the same vein, nodes that can have nodes below them (e.g. organizational units) or the member attribute (e.g., security groups) all become containers to the provider. In active directory, the somewhat tricky part here is that the user should still be able to browse a security group whether it is an actual node under the hood or just a mere value of an attribute. And now for the members of the interface!

```
bool HasChildren { get; }
List<IContainer> Children ();
```

These are self-explanatory. Just note that children always refer to containers and members always refer to members.

```
List<IMember> Members (int _groupnumber);
```

Returns the group of members in specified group. A parameter of -1 means all members of this node.

```
List<MemberGroup> MemberGroups ();
```

A member group is only its name and number.

```
IDSItem FindByPath (string _path);
```

This is meant to be called recursively with a path. Path here is the same type as in FullIDPath above, e.g., backslash separated ids. That is, this path has nothing to do with the underlying directory service – it is an internal path in the generated tree of nodes. When this method is called from the framework the parameter will always be rooted with the called node itself.

```
List<IDSItem> Search (string _pattern, Enumera-
tion.eDDDValueType _type, Enumerations.eSearchScope
_scope);
```

Should execute a search rooted in the current container with the specified pattern of the specified type in the specified scope. Very specified.

IMember

Just as **IContainer**, **IMember** inherits the **IDSItem** interface. But unlike its sibling, this one does not add anything whatsoever to its base.

Format for distribution to NTFS and DMS

The GetFileSystemSecurity method in the supplied DSPs supports NTFS and DMS. The format for NTFS should look like the following:

```
<SID value="1176ce5b-04d1-4608-83c5-1487412e0ec0" />
<SID value="7d94c5e5-dae6-4be2-8e32-16cf7b2ff362" /> ...
```

Each row corresponds to one user or user group in the distribution and is used to grant rights to said user or user group in the file system.

The DMS format:

```
<Name value="lhr" />
<Name value="jjn" />
```

Where vaule is accountname.

11 SNMP

QlikView Publisher now incorporates SNMP agents for all Publisher services, the setting is, however, per default off. This implementation is in its initial stages and is subject to change. At the time of writing we have enabled read from the agents. We support the following messages: GetRequest, GetRespons and GetNextRequest.

All services answer the standard SNMP queries, answer examples in parentheses:

1.3.6.1.2.1.1.1	sysDescr	Description of service/product (sysDescr.0:Qlikview Publisher Commandcenterservice version 8.50.600)
1.3.6.1.2.1.1.2	sysObjectID	Type of unit (sysObjectID.0:iso.org.dod.internet.private.enterprises.qliktech.products.publisher.executionservice)
1.3.6.1.2.1.1.3	sysUpTime	The system uptime (sysUpTime.0:0 hours, 12 minutes, 15 seconds)
1.3.6.1.2.1.1.4	sysContact	Possible to set in configuration file (sysContact.0:Unspecified System contact)
1.3.6.1.2.1.1.5	sysName	Possible to set in configuration file (sys- Name.0:Unspecified name)
1.3.6.1.2.1.1.6	sysLocation	Possible to set in configuration file (sysLocation.0:Unspecified location)
1.3.6.1.2.1.1.7	sysService	Constant, 72 means application server (sysServices.0:72)

The Execution Service can answer additional queries. These are specified in the MIB file; see section about MIB file later in this chapter.

Each service has a configuration file, found in their subfolder in the Publisher installation folder, i.e. the configuration file for the Access Point Service is QVPublisherAccesspointService.exe.config.

The SNMP settings can be adjusted in the SNMP SETTINGS part of the configuration file. The SNMP has to be enabled for all services, the default is off.

EnableSNMP - Set to true to enable SNMP listener. Default value is false.

SNMPPort - Set the port you want to use for the particular Publisher service. See default settings for each service below.

SNMPsysContact - The textual identification of the contact person for this managed node, together with information on how to contact this person. Default value is Unspecified System contact.

SNMPsysName - An administratively-assigned name for this managed node. By convention, this is the node's fully-qualified domain name. If the name is unknown, the value is the zero-length string. If left empty, it defaults to current machine name. Default value is Unspecified name.

SNMPsysLocation - The physical location of this node (e.g. 'telephone closet, 3rd floor'). Default value is **Unspecified location**.

DebugSNMP - Set to true to enable extended debuglog for SNMP listener. Default value is **false**.

The default port settings for the services are:

Command Center 8631
Access Point Service 8633
Directory Service Connector 8634

Execution Service 161 (default SNMP port).

The ports are all configurable. If the services are installed on different computers they can all run on the same port. The ports will change as the implementation moves away from the experimental SNMP range and in to the range allotted QlikTech.

QlikTech has included a MIB file, so all SNMP managers will be able to interpret the additional responses for the Execution Service. The file is installed to

.\QlikView\SNMP. The MIB file is subject to change. The Execution Service can answer the following queries, in addition to the ones previously mentioned:

1.3.6.1.4.1.30764.1.2.2.1	XSJobExecuteStatusTable		
1.3.6.1.4.1.30764.1.2.2.1.1	XSJobExecuteStatusEntry		
1.3.6.1.4.1.30764.1.2.2.1.1.1	XSJobID (ID-number of the job)		
1.3.6.1.4.1.30764.1.2.2.1.1.2	XSJobName (Name of the job)		
1.3.6.1.4.1.30764.1.2.2.1.1.3	XSJobExecuteStatus.(Status of the job. Possible val-		
	ues are:		
	•	Running	
	•	Finished	
	•	Finishedwitherrors	
	•	Idle	
	•	Finishedwithunknownstatus	
	•	Finishedwithwarnings	
	•	Finishedwithabort	
	•	Finishedwithdependenciesnotfulfilled)	

1.3.6.1.4.1.30764.1.2.2.1.1.4	XSJobNextExecutionAt (When the job will be executed next).
1.3.6.1.4.1.30764.1.2.2.1.1.5	XSJobLastExecutedAt (When the job was last executed).
1.3.6.1.4.1.30764.1.2.2.1.1.6	XSJobCurrentWork (What the job is doing now).
1.3.6.1.4.1.30764.1.2.2.1.1.7	XSJobEnabled (Whether the job is enabled).

Read more about SNMP:

RFC for SNMP - http://www.ietf.org/rfc/rfc1157.txt

 $Wikipedia-http://en.wikipedia.org/wiki/Simple_Network_Management_Protocol$

12 SUPPORT TOOLS

12.1 LDIF Import

The LDIF import tool imports users and groups from an LDIF file into QlikView Publisher 8.50. The roles will be stored as Custom Roles.

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

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

13 QLIKVIEW PUBLISHER 8.50 AND SECTION ACCESS

A very important change in QlikView Publisher 8.00 and onwards compared to 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 the XS is running under the local computer accounts Local System or Network Service, the computer account must be added to your Section Access. The account name of the computer is usually the name of the computer plus a \$ sign, e. g. PublisherServer\$. 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, the document cannot be used by the Publisher at all or the data it can access will be limited.

13.1 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.
- 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.

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