Qlik Insight Bot June 2020 Patch 2

Release notes

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What's new in Insight Bot June 2020

- **QIB can now be installed by single installer.**
  Description: In existing installation process, multiple installers are required to execute in order to enable bot in Qlik Sense which is tedious, and time taken process as well as at some point it is confusing for users to understand which installer does what job. In this release, we are going to provide, singe installer, by which all the services will be installed and avoid multiple installations. Also, configuration process will be little easy compared to earlier installs.

Bug Fixes

Qlik Insight Bot build June 2020 comes with fixes for the issues described below.

June 2020 Patch 2

QIB doesn't respond for the very first question on dimension only when there is a custom calendar configured.

Jira Issue ID: QIBDEV-837

Description: If a custom calendar is configured for an application and user asks a question for dimension only, ex. Products, QIB respond with error message.

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Some charts are generated in bot are different to that of Qlik Sense.

Jira Issue ID: QIBDEV-555

Description: When a question is asked for a measure by two dimensions where one is parent and another is child, charts are not properly rendered in image and looks different from the one generated in Qlik Sense. For ex. Sales by Category and Sub category

Measure vs Measure: Not working as expected if both measures have different number format.

Jira Issue ID: QIBDEV-556

Description: When there are two measures asked in the question which have different format, e.g. sales has money format and profit % has percentage format, it shows wrong chart in Qlik Sense.

if one of the measures in measure by measure question is available in more than one app then it shows answer for the non-selected app.

Jira Issue ID: QIBDEV-645

Description: If bot is asked "measure by measure" question and if one of the measures is available in some other app , then it would show answer for that other app and not the selected app. Also, after which you will not be able to apply any filters.

Seeing restore fail for from backup file if there are no mappings available for one of the measures

Jira Issue ID: QIBDEV-709

No answers returned on clicking on buttons when Master item names start or end with certain characters.

Jira Issue ID: QIBDEV-741

Description: When master item name has non-ascii characters, it doesn't respond correctly on clicking button of measures and dimensions.

Error when trying to select an App with + character in the App name.

Jira Issue ID: QIBDEV-742

Description: When there is a + sign in application name, it doesn't work if we try to select the app.s

Date master dimensions disabled in QIB portal but still appear in "Show dimensions" query.

Jira Issue ID: QIBDEV-743

Description: A master dimension 'date' is excluded from Qlik Insight Bot Management Console, but user can still see that dimension in the list of dimensions on asking Show Dimensions.

Copy Narrative Config file in Build.

Jira Issue ID: QIBDEV-744

Description: Narrative service will not work if it is installed on different drive other than C:\

Buttons related to measures displayed on asking ranking questions does not have any description.

Jira Issue ID: QIBDEV-747

Description: When some ranking question is asked , it displays few buttons of measures related to that question. But it also displays some description on top of that answer like "You might be also interested in". But here it is just displaying the button.

Narrative service page UI not loading on browser.

Jira Issue ID: QIBDEV-755

Description: Even After adding client certificate to chrome, seeing that narrative service UI page not loading on browser.

Custom Calendar does not work when there are some measures assigned with the NA date field.

Jira Issue ID: QIBDEV-772

Description: When there is a Custom calendar where only one measure has assigned with the custom calendar and other measures are assigned with NA, it gives no chart or gives error.

Dimensions and measures selection not getting restored after back up.

Jira Issue ID: QIBDEV-776

Description: If you restore a backup of measure and dimension in Qlik Insight Bot Management Console, it is not considering _exclude tag while restoring.

Unable to Authenticate in QIBMC.

Jira Issue ID: QIBDEV-777

Description: If server drops the access to user active directory after configuration, QIBMC won't get connected.

QIB is not working for users whose userid contains space in it.

Jira Issue ID: QIBDEV-779

Description: Qlik Insight Bot is not recognizing user when there is a space in userId.

Rule Engine: custom answer having period filter do not work when custom calendar is configured.

Jira Issue ID: QIBDEV-787

Description: When custom calendar is configured and if there is a rule-based answer has period defined in answer, it doesn't give correct answer. Ex. Custom Answer has @[Sales].[Current Year]. here sales are not giving for current year as per the custom calendar configuration.

Update vulnerable version of jQuery (3.3.1).

Jira Issue ID: QIBDEV-799

Description: jQuery version is used in webchat is vulnerable.

Rule Engine: Rule on dimension containing answers in list format does not respond based on asked time period.

Jira Issue ID: QIBDEV-815

Description: Custom Answer on dimension containing list-based answer & allowing date period does not give correct answer. e.g Top 3 products by sales <list type="top" size="3">#[Product] - @[Total Sales]</list>

QIB MoM, QoQ, YoY are not giving correct output.

Jira Issue ID: QIBDEV-816

Description: While we try to select MoM, QoQ and YoY button, Bot is not giving the expected result. When there is a master dimensions with names "Month", "Quarter", and "Year" are present even if its excluded.

$B/$M is not displayed in the insights, YoY, QoQ but the conversion is done, when change the (-ve) formatting for measure.

Jira Issue ID: QIBDEV-817

Description: While we ask a question to bot with measure when the insights are enabled, it is responding its value without their format($M,$B) when (-ve) formatting is applied to measure.

Rule Engine : Custom rules set on dimension and filterondimension does not respond based on asked time period.

Jira Issue ID: QIBDEV-818

Description: If a rule is set on dimension or FilteronDimension, and if we allow time periods in that rule it does not give correct answer.

QIB failed to apply filter if a master dimension name is same as some other master dimension's field name.

Jira Issue ID: QIBDEV-834

Description: The dimension values are not recognized if the dimension name in one master dimension is similar with other master dimension name.

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Qlik Insight Bot Management Console shows incorrect dimension pushed value count.

Jira Issue ID: QIBDEV-326

Description: When metadata of an application is pushed to NLU, the count of pushed values shown under application name is incorrect. It considers the count for those dimensions which are not selected for pushing dimension values.

Table command suggested twice.

Jira Issue ID: QIBDEV-386

Description: In webchat while typing, autosuggestion for 'table' shows twice.

No suggestions for bookmarks.

Jira Issue ID: QIBDEV-387

Description: In webchat, autosuggestion doesn't show suggestion for 'show bookmarks'.

Arrows generate console errors.

Jira Issue ID: QIBDEV-388

Description: When user tries to get the recent queries/commands using arrow keys, browser console shows errors for each try.

Rules are conflicting while evaluating.

Jira Issue ID: QIBDEV-394

Description: When there are two same rules created with same conditions, but the only addition is one rule has keyword in it, it fails to identify the correct rules. It always identifies only first one which hasn't keyword added.

Asked queries still referenced the custom calendar even it is deleted.

Jira Issue ID: QIBDEV-447

Description: If a custom calendar is removed from Qlik Insight Bot Management Console for an application and asked any question for that application, it is still reference the custom calendar to provide the answers.

NLU fails to identify expected intent when asked entity is a measure as well as dimension value

Jira Issue ID: QIBDEV-450

Description: If an entity from asked question belongs to a measure/dimension and also a dimension value, it fails to identify correctly. Ex. If Sales is a measure and some dimension's value, and it is asked 'Select Sales', QIB responds for the Sales as measure and not selecting a value from dimension.

Questions asked for bottom values without measure is not identified properly.

Jira Issue ID: QIBDEV-466

Description: If a question is asked to get bottom values for a dimension without mentioning a measure in the query, it responds as it is asked for clearing any selections. Ex. on asking 'bottom 7 products', it is showing like "selections are cleared"

Same answers for comparison questions having one same dimension asked in previous question and contextual measure.

Jira Issue ID: QIBDEV-542

Description: Bot gives same response if contextual question of comparison question has common values. Ex. It gives same response for this sequence of the questions 1) Compare it for Auto Care and Lottery. 2) Compare it with Lottery and Tobacco

No validations for the mandatory fields while creating bot training task in QIBMC.

Jira Issue ID: QIBDEV-543

Description: One can save trigger without mandatory inputs from Tasks from Qlik Insight Bot Management Console.

Even if the user is logged out QIBMC page remains as is.

Jira Issue ID: QIBDEV-544

Description: If a user session is expired or timed-out, management console page remains as it is and upon performing any activity on that page results into error.

One cannot update the custom calendar, once it is created and saved.

Jira Issue ID: QIBDEV-549

Description: If a user wants to update an existing custom calendar created in QIBMC, he can edit but the changes are not updated in repository.

On asking show selection bot asks for selecting visualizations.

Jira Issue ID: QIBDEV-551

Description: When it is asked to show selections by asking "show selection", bot responds with list of buttons of visualizations.

While adding a rule, it shows an error "Limit already exists".

Jira Issue ID: QIBDEV-561

Description: While creating a rule, if one supposed to add a condition on Limit without selecting limit value (top/bottom), it doesn't add that condition (expected) but if user is trying to add condition with limit type it fails to add and gives an error "Limit already exists".

Filters keep changing on alternate questions when irrelevant dimension values/dimensions are made to be selected at a time.

Jira Issue ID: QIBDEV-563

Description: If user selects filter(s) which are exclusive then selections for subsequent questions are not working properly.

Editing rule window does not open if a rule has special character in keywords.

Jira Issue ID: QIBDEV-621

Description: If a rule has special character(s) in keywords and/or custom answer (e.g. Current week's Summary, Here's the total sales @[Total Sales]), then it is saved but when can't be edited. It doesn't open an editing window.

Virtual proxy and QIB not working as expected.

Jira Issue ID: QIBDEV-635

Description: If Qlik Sense UserID has any special character then Webchat is not working as expected. Special characters could be any like ",@,%,^,!;'

QIB extension API URL is not formatted correctly when using a virtual proxy prefix.

Jira Issue ID: QIBDEV-641

Description: URL targeting to webchat service is not generated properly when bot is used from virtual proxy url.

Misspelling in status logs for Insight Bot.

Jira Issue ID: QIBDEV-644

Description: If pushing of metadata fails, a message depicting the same is having a incorrect spelling of 'Metadata'.

Forecast measures for next day/number of days is not working.

Jira Issue ID: QIBDEV-650

Description: As bot used to answer forecast measure related questions for the week, month, and year. Now bot can answer forecast measures for the next day or the next number of days.

Forecast question returns empty list ([""]).

Jira Issue ID: QIBDEV-685

Description: Bot is not giving proper response upon asking forecast for a measure on application having granularity other than date.

SFB password is stored as plain text.

Jira Issue ID: QIBDEV-708

Description: SFB password is being stored as plain text while configuring the SFB channel in the QIB configuration application.

Improvements

June 2020 Patch 2

- **Disable the chart link generation in Qlik Insight Bot**
  Description: In the existing version, a chart is only generated in Qlik Sense by clicking on the link. Now, it is configurable that admin can completely disable the chart link that QIB user will not see the link in the response.

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- **Enable QIB to get Email ID from user defined attribute in Qlik Sense**
  Description: From this patch QIB can recognize email id from any user defined attribute in Qlik Sense. Earlier, it was only able to recognize email from Qlik Sense User if it is available in 'Email' property. Now, it is configurable that user can configure any property name which contains the email id in Qlik Sense.

- **Updated code to work QIB Management Console on Azure environment.**
  Description: If QIB Management Console is hosted on Azure or hosted as applications under one site, it was unable to get connected. Now, it will work even it will be hosted as an application under site or on azure.

- **Restricted NLU service to server request on TLS 1.0**
  Description: NLU service was allowing TLS 1.0 which is deprecated which made it unsecure. NLU service will only allow TLS 1.2 now onwards for better security which is recommended.

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- **UI improvements for Webchat on Hub**
  Description:

  1. On clicking a button, focus from typing area was lost and user had to click again in typing area which is now handled.

  2. While typing, webchat autosuggests keywords. If you apply the backspace, suggestion list is not refreshed which is handled. If a text is changed in typing area by applying space, it always suggests for 'email me'.

  3. On initialization of bot, it will show loader until bot is initialized and a welcome message to user which indicates the bot is ready to answer questions.

4. Progress Indicator while getting response from QIB. In existing version, QIB is not showing any process or there is no indicator from where user can know that bot is processing the request. Progress indicator is added which will be displayed until the message is rendered/responded back.

- **QIB webchat on Hub and Extension is now supported on Internet Explorer – 11**
Description: Existing version for webchat on hub and extension was not compatible with internet explorer due to JavaScript and style sheet incompatibility. It will work now onwards with IE with few limitations on buttons that button will be shown only on hovering on it.

- **Checkbox for selection all measures/dimensions under application details in Management Console .**
Description: To exclude or include all dimensions/measures in one go, checkbox to select / deselect is provided in dimension / measures tabs under application in Management Console.

- **Improvement in Apply Bookmark and selections feature .**
Description:

1. Bookmark / Field selections were maintained by QIB and applied on Qlik Sense application to retrieve the data. This feature is now improved and selections are now maintained in Qlik Sense application session created by QIB.

2. QIB was showing selection buttons for each selection value. In case of large amount of selection values, chat window might be filled and focus on answer is moved to selections. In this improvement, it will show single button per field which will show number of selections out of all in case of multiple selections from single field and will show filter value in case of single selection. Ex. Region – Central , Product – 8 of 288

3. Selection buttons will show 'x' mark on it which will indicate that on clicking the button, it clears the selections.

- **Security enhancement in user identification.**
Description: Included user directory in the request coming from webchat service which helps in evaluation of user with user directory in case of same user id with multiple user directories.

- **Metadata is refreshed in the service on any modifications in it.**
Description: Metadata was read and kept in memory in the NLP service for identifying the entities. This metadata was not refreshed on any change from QIBMC and it was compulsory to refresh data from chat. Also, QIB renders and checks into rules on each request which should be loaded on service start and keep updated on any change from QIBMC. It may lower the performance in terms of response time. It is now improved.

- **On deletion of custom calendar, custom calendar assignment to measure is changed to default date field.**

Description: If user deletes a custom calendar, measure assignment is changed to NA which will now based on default date field. If there is a default date field assigned, it will be changed to that field otherwise NA.

- **'Latest' keyword is not identified by NLU.**
  Description: If a query contains 'latest' keyword with a period asked, it was not being identified by QIB. It should be identified as keywords like current, last, etc.

- **Push fails when no dimension or only date dimensions are selected**
  Description: Push action fails in case of no dimensions in the application, if all the dimensions are having keywords date/week/month/quarter/year in them or selected dimensions are date related dimensions. These scenarios are improved while deployment.

- **Improvement in responses provided by Qlik Insight Bot**
  Description: Improved the templates of responses in terms of words used and grammar correction.
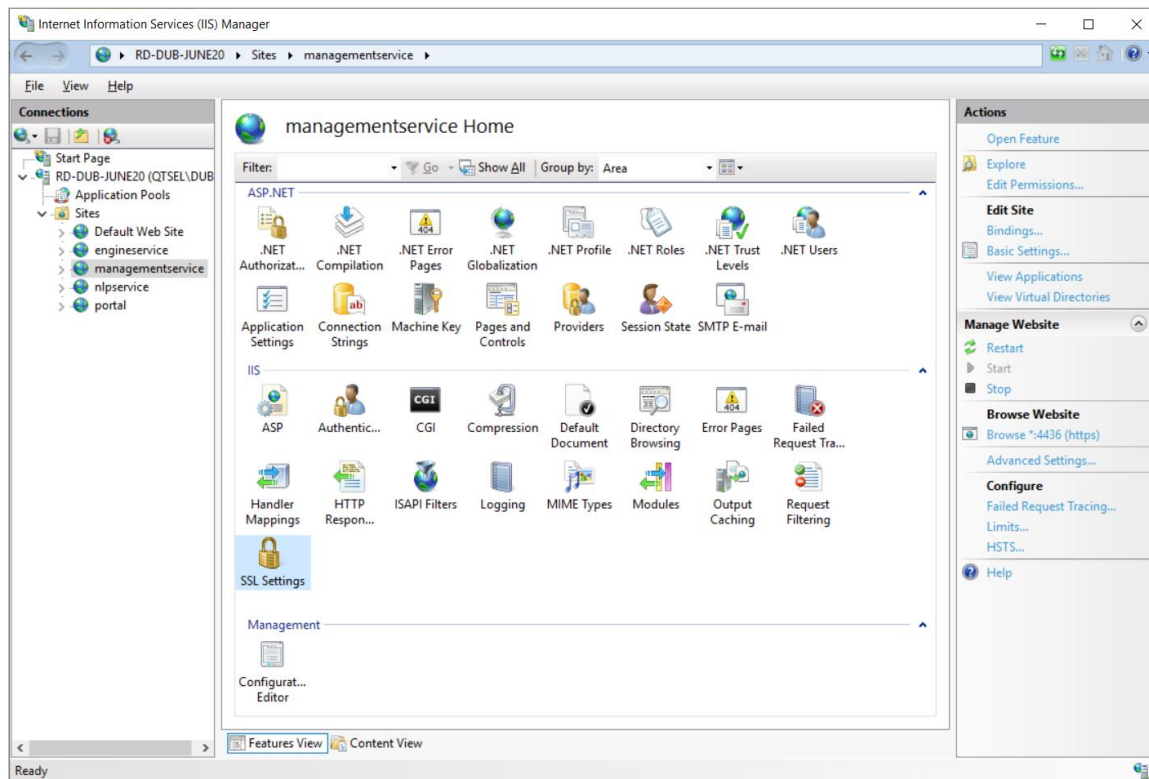
Upgrade Notes

Note: For prior to Qlik Insight Bot Feb 2020 version, you will have to follow steps from earlier versions' releases notes.
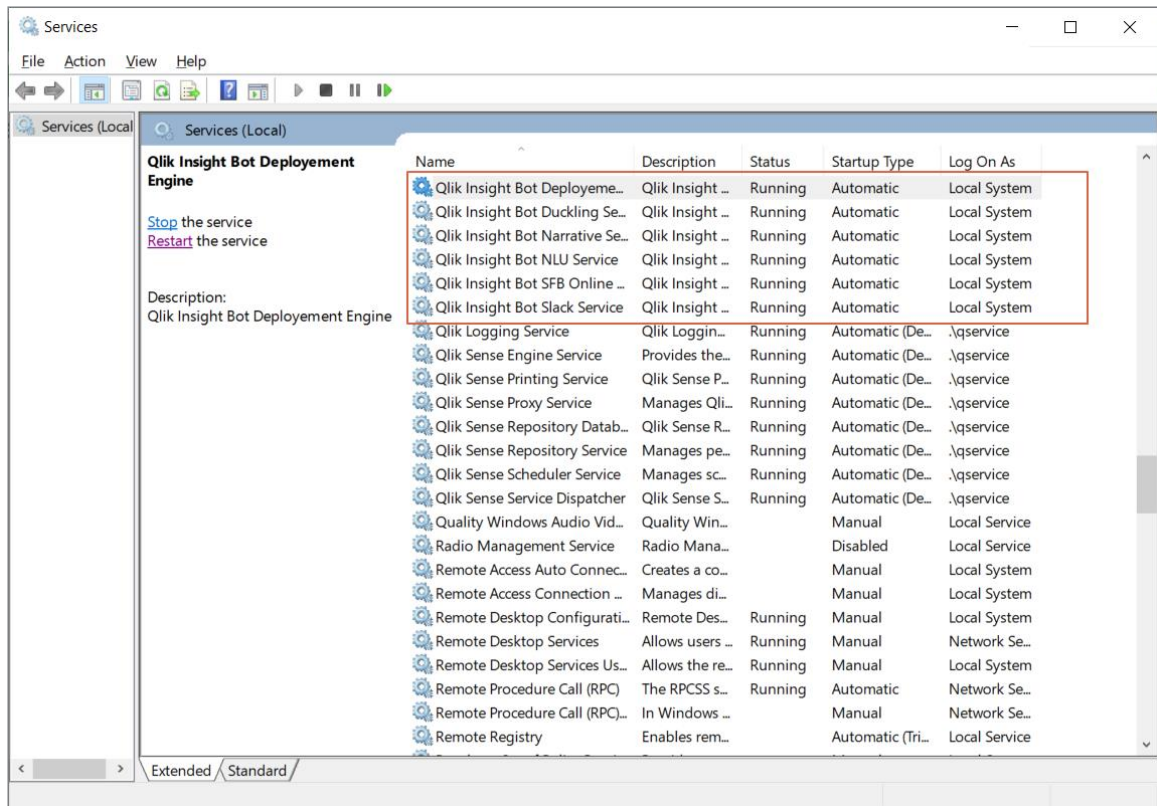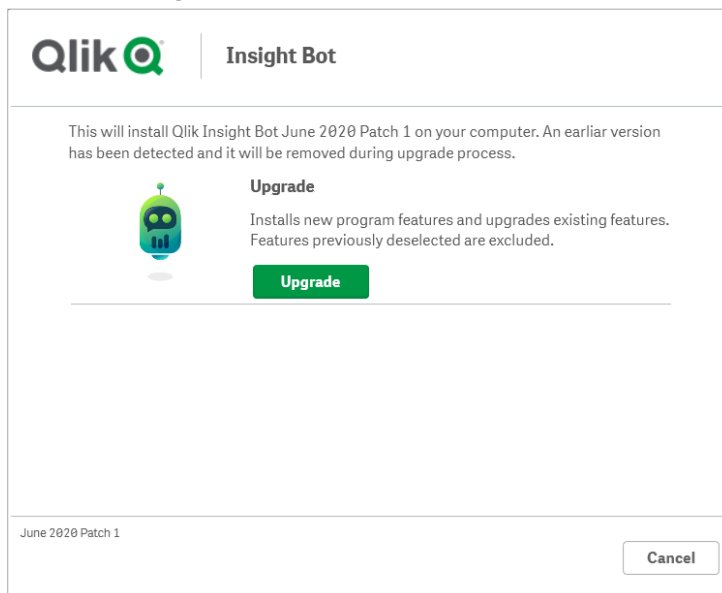
From June 2020 to June 2020 Patch 2

Steps:

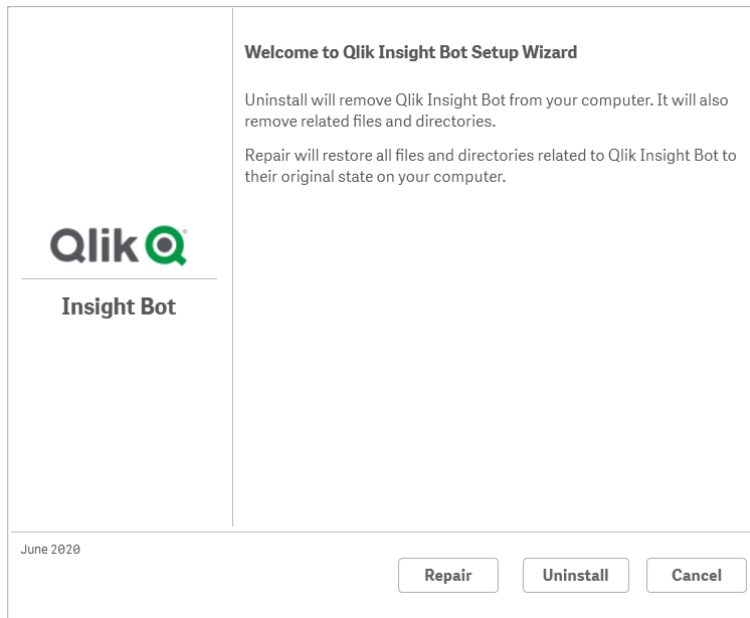1. Open IIS Manager and stop all the web services related to Qlik Insight Bot.

2. Stop all Qlik Insight Bot Windows services

3. Run Qlik Insight Bot Patch 2.exe as administrator and click **Upgrade.**

4. Follow the installation steps.
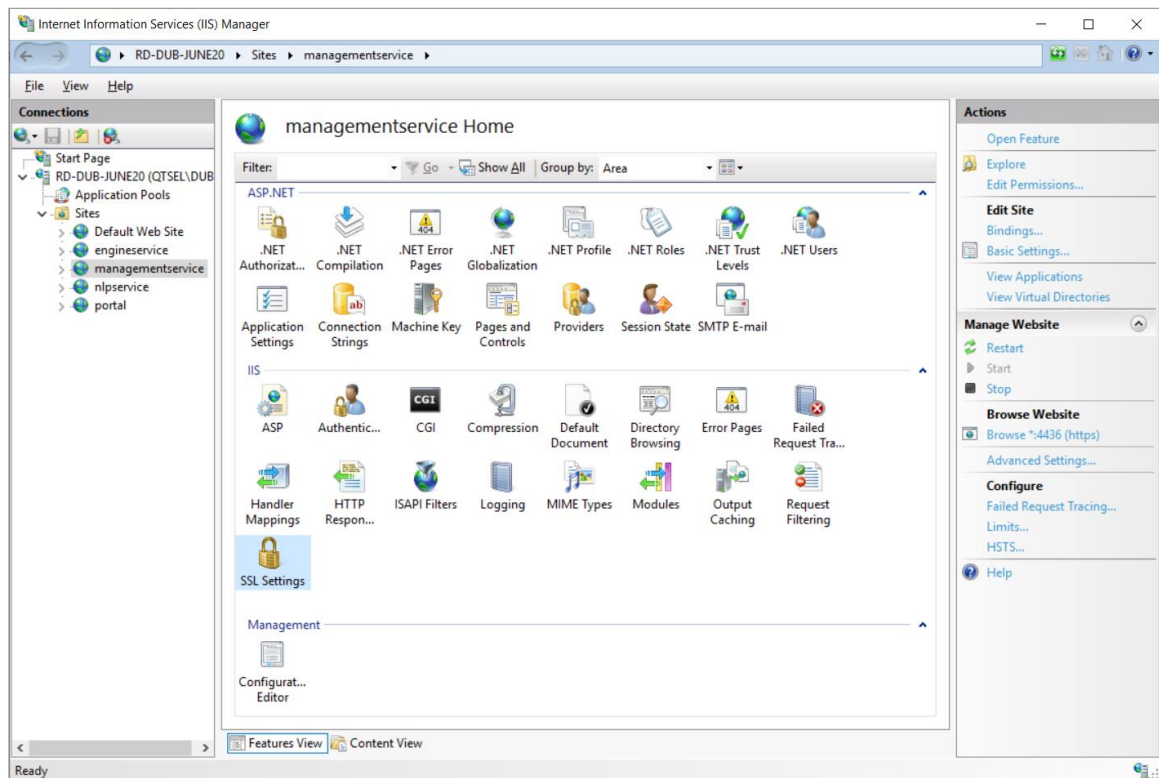5. Click **Cancel** when you see below dialog.

6. Finish the installation
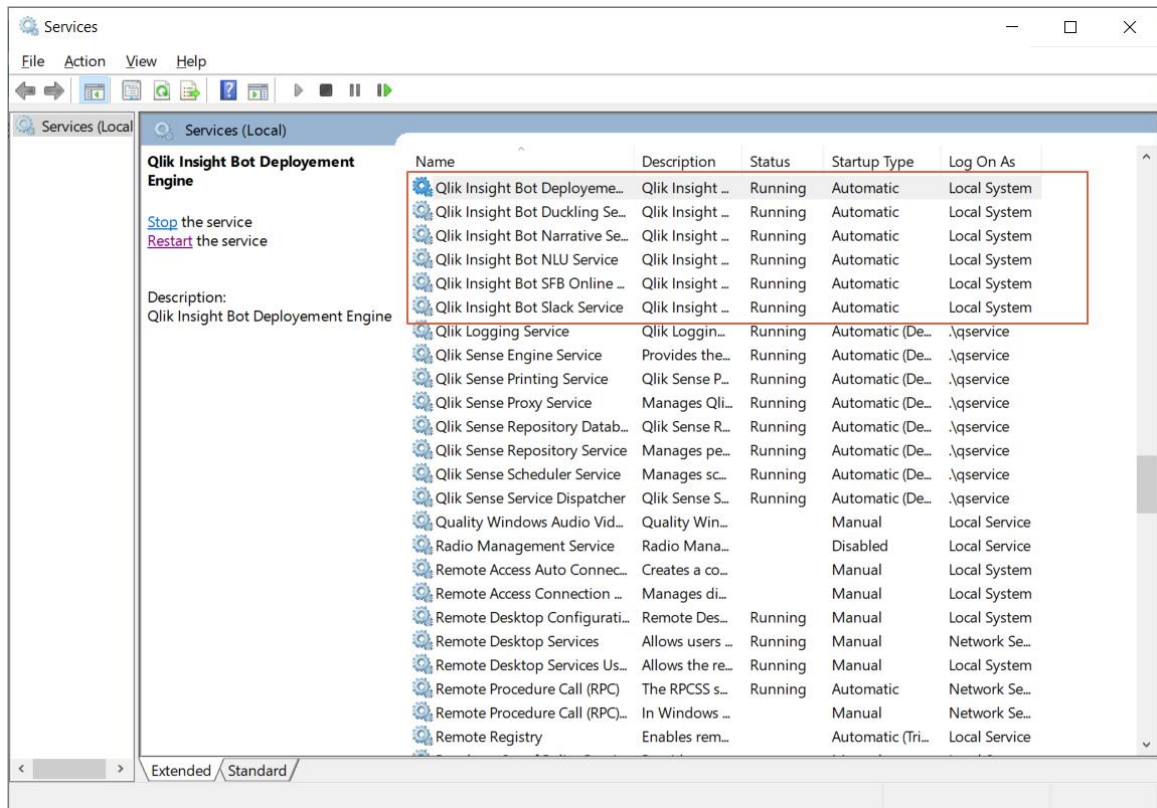
From June 2020 Patch 1 to June 2020 Patch 2

Steps:

1. Open IIS Manager and stop all the web services related to Qlik Insight Bot.

2. Stop all Qlik Insight Bot Windows services

3. Run Qlik Insight Bot Patch 2.exe as administrator and click **Upgrade**
4. Follow the installation steps and finish the installation steps.

Known Limitations and Bugs

The following limitations and bugs were identified at release time. The list is not comprehensive; it does however list all known major limitations and bugs.

- Qlik Cloud environment is not supported.

- There is no scalability of NLU. NLU can be run on single server only.

- Master item name and dimensional values allow alphanumeric characters and few special characters with limitation as mentioned below.

Allowed Characters	No Restriction	^ _ / | @ - 0-9 a-z
	Should not be at starting position	$ % +
	Should not be at starting or ending position	! # & * ; -
Not Allowed	Anywhere in the name	"@ ", "&_", "&:", "_&", "_:", ":&", ":_", "(", ")", "{", "}", "[", "]", ":", "<", ">", "\\", "\"", comma, ., Dash

- Comments in the expression of any master items aren't supported.

- Filters (selections) can't be applied on calculated dimensions.

- No other chart types but Bar, Line, Pie and Scatter chart types are supported.

- Third party visualizations aren't supported.

- Complex date periods e.g. **First and Last quarter of 2018** are not supported.

- "Forecast" and "Surprise me" features doesn't support showing the chart.

- Charts with more than 2 measures or 2 dimensions aren't supported.

- Webchat on QS Hub and QIB QS Extension will work only with SSL Certificate signed by a valid certificate authority (CA) for Qlik Sense June 2019 to Nov 2019.

- A forecast statement must include "next" keyword before the tenure e.g. Forecast my sales for next 6 months. Also, forecast feature doesn't support an absolute time period e.g. **Forecast my sale for August 2019** won't be answered.

- Forecast works only when the app contains a transactional data of rolling 12 months i.e. forecast won't give any result if the app is having snapshot data.

- Unless precisely mentioned, all time periods will be considered as a future time period e.g. as on 3/21/2019, **February**, in a question, will be considered as **February 2020**.

- Multipurpose questions aren't supported e.g. Show me **top stores** where sales is **greater than 10K**. Here, two purposes are expected to be served in a single question - Top Values and Conditional Filtering.

- Alerts can't be set for condition(s) having relative values e.g. Alert me when my sales is **increased by 5%**.

- On-demand aggregation of dimension/measure is not supported. E.g. Average Sales or Count of Customers etc.

- A chart with multiple dimensions/measures isn't supported by QIB's Rule Engine.

- No Filters/selections can be applied inside the <List> of a custom answer prepared in a Rule Engine.

- If a rule is created from Rule Engine with several "Allow Date periods", the exact name of date period must be included in the question and not the synonym e.g. if **Last Year** is selected as an allowed date period, the question containing **Past Year** will not invoke the rule.

- QIB may not give proper response if a measure/dimension name matches with any of the dimension value.

- Qlik Insight Bot extension doesn't support in Qlik Sense Mobile Application.

- If Microsoft Visual C++ is already installed, PostgreSQL installation may fail.
  Workaround: Uninstall Microsoft Visual C++ from the machine and try reinstalling.

- QIB will not provide accurate answers/insights for below patterns when measures are tied to custom calendar.

    - <measure> for last 2 months/last 5 years
    - <measure> for first quarter of 2018/last 6 months of this year/period 1 of 2019

- QIB will not answer for below cases when measures are tied to custom calendar.

    - Forecast for next **n** period/years/quarter

- A contextual question "for the last quarter of the previous year" will not work for a query related to a measure.

- If **_exclude** tag is added as a measure tag in the Qlik Sense application but this measure is included from portal, on reloading measures from portal this tag is added, and measure is excluded. Same happens with dimension also.

- QIB only supports English language. If regional settings / locale of the server where Qlik Insight Bot components are installed in other than English, it is creating problem and getting the wrong response.

- QIB Management Console can only work in Google Chrome browser.

- Webchat on hub and extension can work with IE-11 with limitation of buttons display (only for Qlik Sense and Qlik Insight Bot June 2020).
  Workaround: Use google chrome best chat experience.

- Qlik Insight Bot Users without their emails associated in Qlik Sense Management Console -> Users will not be able to get alerts. In other words, emails are must for QIB users to utilize Alert feature. Also, Email me/Email to someone feature do not work.

- If a question on period over period comparison (e.g. mom sales) is asked and a consecutive question is contextual one (e.g. how about last year), QIB will give response for period over period as provided for earlier question.

- While applying any two filters separated by comma, it will not be identified. Ex. Select candy,chew.
  Workaround: Provide space after each comma separator. Ex. Select candy, chew.

- Application name allows only alphanumeric characters and few special characters i.e. !, @, *, - (,) .

System Requirements Notes

Hardware

- Memory: 32 GB minimum

- Hard Disk Space: 25 GB minimum

- CPU Cores: 8 minimum

Software

- Windows Server 2012 to Windows Server 2019

  -OR-

  Windows 8 or 10 – Dev and Testing purpose only

- Below ports needs to be available

Port	Purpose
4431	Used by Qlik Insight Bot Webchat Service for Qlik Sense June 2019 to Nov 2019
4434	Used by Qlik Insight Bot Engine Service. Note: Open this port in order to configure 3rd party chat platforms
4435	Used by Qlik Insight Bot Portal. Note: Open this port, only if Qlik Insight Bot portal should be accessible from outside the network.
4436	Used by Qlik Insight Bot Management Service
4437	Used by Qlik Insight Bot NLP Service
5000	Used by the Qlik Insight Bot NLU
8000	Used by the Qlik Insight Bot Duckling
8001	Used by Narrative Service

- Qlik Sense Server June 2019 to September 2020

- IIS 8.0

- .NET framework 4.7.1 or newer

- Chat Platform(s) (based on user's requirement)

  - Slack

  - Microsoft Teams

  - Skype for Business (Online)

For Network

- Ports needs to be opened

Port	Purpose
4431	To communicate with Qlik Insight Bot Webchat Service from outside of the network or from where the Qlik Sense is accessed. (For Qlik Sense Nov 2019)
4434	To communicate with Qlik Insight Bot Engine Service by Webchat Service. If Webchat Service and other components are on same machine, it is not required to open.
4435	To access the Qlik Insight Bot Management Console from outside of the network. This is optional.
5000	To access the Qlik Insight Bot NLU (if installed on separate server) from Qlik Insight Bot machine.
9200	To be opened in Qlik Sense Environment. This is to access Qlik Sense licensing from Qlik Insight Bot machine
4242	To be opened on Qlik Sense machine to access the Qlik Sense Repository API from Qlik Insight Bot
4243	To be opened on Qlik Sense machine to access the Qlik Sense Proxy API from Qlik Insight Bot
4747	To be opened on Qlik Sense machine to access the Qlik Sense Engine Service API from Qlik Insight Bot

Qlik Q LEAD WITH DATA

About Qlik

Qlik is on a mission to create a data-literate world, where everyone can use data to solve their most challenging problems. Only Qlik's end-to-end data management and analytics platform brings together all of an organization's data from any source, enabling people at any skill level to use their curiosity to uncover new insights. Companies use Qlik to see more deeply into customer behavior, reinvent business processes, discover new revenue streams, and balance risk and reward. Qlik does business in more than 100 countries and serves over 48,000 customers around the world.

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