Configuring Channels

Qlik Insight Bot®
February 2020
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Contents

1. Introduction ........................................................................................................................................... 1

2. Configuring Slack ................................................................................................................................... 1
   Configure a Request URL ..................................................................................................................... 1
   Configure a messaging endpoint ......................................................................................................... 3
   Create a Slack app .................................................................................................................................. 3
   Add a new Redirect URL ...................................................................................................................... 4
   Create a Slack Bot User ....................................................................................................................... 5
   Subscribe to Bot Events ...................................................................................................................... 8
   Configure Interactive Components .................................................................................................... 9
   Install Application ............................................................................................................................... 10
   Save Application Credentials ............................................................................................................. 11
   Configure Slack Bot with Azure ......................................................................................................... 12

3. Configuring Microsoft Teams ................................................................................................................ 14
   3.1 Using Azure .................................................................................................................................... 14
      Configure a messaging endpoint ...................................................................................................... 14
      Add Microsoft Teams ....................................................................................................................... 16
   3.2 Using App Studio in Microsoft Teams .......................................................................................... 17
      Configuration in App Studio ............................................................................................................. 17
   3.3 Add Qlik Insight Bot in Microsoft Teams ................................................................................... 24

4. Configuring Skype for Business Online ............................................................................................... 26
   Create a user in Office 365 ................................................................................................................... 26
   Create an application in Azure ........................................................................................................... 28
   Add Qlik Insight Bot in SFB Online .................................................................................................. 33

5. Configuring QIB Extension in a mashup ............................................................................................... 34
   5.1 Include the QIB Extension in the mashup .................................................................................... 34

6. Configuring QIB Webchat Hub in Mashup ........................................................................................... 36

7. Configuring a Direct Line channel with Azure ................................................................................... 37
1. Introduction
With Qlik Insight Bot, users can have insightful conversations regarding their Qlik Sense Enterprise data assets on recognized chat platforms such as Slack, Microsoft Teams, or Skype for Business Online. For your users to have conversations with Qlik Insight Bot, you must configure the platform.

You can configure all platforms using a bot in Azure. For information about creating bots in Azure, see Qlik Insight Bot Creating a bot in Azure.

For Slack and Skype for Business Online, you can install the Qlik Insight Bot service for the platform instead of using an Azure bot. For Microsoft Teams, you can configure the platform using App Studio instead of using an Azure bot.

The purpose of this document is to show how to configure channels with Azure, and how to configure Microsoft Teams with App Studio.

2. Configuring Slack
Configure a Request URL
1. Go to the Azure portal, and select the bot you want to configure.

See Creating a Bot in Azure for more information.
2. Select **Settings** under **Bot Management**.

3. Copy the **Bot handle** and replace it with **(Bot handle)** in the following URL and then store the modified URL in a text file for later use:

   https://slack.botframework.com/api/Events/{Bot handle}.

   e.g. https://slack.botframework.com/api/Events/TestBot
Configure a messaging endpoint

4. Under Configuration, type https://<Server URL>:4434/api/messages as a messaging endpoint under section, and then click Save.

A Server URL is a public URL of a server where Qlik Insight Bot Service is to be installed.

Create a Slack app

5. Log in to Slack using admin credentials.
6. Go to Slack API and click Create a classic Slack app to create an application.

7. Enter an App Name, select Development Slack Workspace, and then click Create App.
Add a new Redirect URL
Skip this section if you are not using Slack channel from Azure.

8. After creating an app, select **OAuth & Permissions**, under **Features** on left panel.

9. Click **Add a new Redirect URL**.
10. Enter https://slack.botframework.com as a Redirect URL, click Add to add URL and click Save URLs to save the added URL.

Create a Slack Bot User

11. Select App Home under Features from left panel.
12. Click **Add Legacy Bot User**.

13. Enter **Display Name**, **Default Username**, turn on **Always Show My Bot as Online** and click **Add Bot User**.
14. After creating a bot user, click **Event Subscriptions**, under **Features** from left panel and turn on **Enable Events**.

15. Enter the **Request URL**. This is the URL which we stored earlier. (refer **Step-3**). E.g. https://slack.botframework.com/api/Events/{Bot handle}
16. Scroll down to **Subscribe to Bot Events** add following bot user events and click **Save changes**.
   a. member_joined_channel
   b. member_left_channel
   c. message.channels
   d. message.groups
   e. message.im
   f. message.mpim

**Configure Interactive Components**

17. After subscribing to bot events, click **Interactive Components** under **Features** from left panel and turn on **Interactivity**.

18. Enter the **Request URL** and click **Save Changes**.
   - In case of Azure: [https://slack.botframework.com/api/Actions](https://slack.botframework.com/api/Actions)
   - Otherwise: [https://<qib-engine-service-url>/api/slack/actions](https://<qib-engine-service-url>/api/slack/actions)

   Here, the **qib-engine-service-url** will be the URL where we are going to install Qlik Insight Bot Engine Service is running. Ex. [https://foo.domain.com:4434/api/slack/actions](https://foo.domain.com:4434/api/slack/actions)
Install Application

19. After completing the configuration, click Install App under Settings from left panel. Click Install App to Workspace to install the application.

20. Click Allow to authorize bot user.

21. Copy the Bot User OAuth Access Token and store it somewhere in a text file. This will be needed in the Qlik Insight Bot Configuration App.
Save Application Credentials
Skip this section if you are not using Slack channel from Azure.

22. After installing an application, click **Basic Information** under **Settings** on left panel.

23. Scroll down to App Credentials, copy **Client ID**, **Client Secret** and **Verification Token** and store them. They will be needed later.
Configure Slack Bot with Azure
Skip this section if you are not using Slack channel from Azure

24. Go to Azure Portal and select the appropriate Bot.

25. Select Channels under Bot Management.
26. Scroll down to **More channels**, select **Slack**.

![Image of More channels and Slack selection](image1.png)

27. Enter **Client ID**, **Client Secret** and **Verification Token** (refer step – 23), and then click **Save**.

![Image of Configure Slack](image2.png)

28. Click **Allow** to validate the Slack Bot with Azure.

![Image of Sample Insight Bot permission request](image3.png)

Now, Slack Bot should be configured with Qlik Insight Bot Web service and ready to use.
3. Configuring Microsoft Teams

There are two ways to configure bot for Microsoft Teams.

1. Using Azure
2. Using App Studio in Microsoft Teams

3.1 Using Azure

Configure a messaging endpoint

1. In Azure Portal, select a bot you want to configure.

   ![Azure Portal screenshot]

   See Creating a Bot in Azure for more information.

2. Select **Settings** under **Bot Management**.

   ![Settings under Bot Management]

3. Provide https://<Server URL>:4434/api/messages as a messaging endpoint under Configuration section, and then click Save to configure Messaging endpoint.

A Server URL is a public URL of a server on which Qlik Insight Bot Service is to be Installed.
Add Microsoft Teams

1. Select **Channels** under **Bot Management**.

2. Scroll down to **Add a featured channel**, and select **Microsoft Teams**.

3. Click **Save**.
Configuring Microsoft Teams

Now, the Microsoft Teams bot should be configured with Qlik Insight Bot Web service and ready to use.

3.2 Using App Studio in Microsoft Teams

To create an app using App Studio in Microsoft Teams, you must have access to app registration in Microsoft Azure Portal. It is not possible to create an app in Microsoft Teams without access to app registration.

Configuration in App Studio

1. **App Studio** is a Teams app which can be found under Teams Apps. See the **Apps** Icon in the left-hand ribbon of Teams.
2. **In the Apps, locate App Studio.**

![App Studio](image)

3. **Select App Studio.** You will see the following screen.

![App Studio](image)

4. **Click Install.** You will see the following screen. Click **Open for Bot**.

![App Studio is now available for you](image)
5. This will open the App Studio in Teams as shown below.

6. Click **Manifest Editor** and **Create a new app**.

7. Provide appropriate **App Details**. Give a short/unique name for your application. Your users will see this as your bot name.

<table>
<thead>
<tr>
<th>App names</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Short name</td>
<td>Demo App</td>
<td></td>
</tr>
<tr>
<td>Long name</td>
<td>* New App for Microsoft Teams</td>
<td></td>
</tr>
</tbody>
</table>
8. **Identification**: Click **Generate** to get unique **App ID**. Give appropriate package name and version of your application.

![](image)

9. **Add application specific description to the application, to help users to identify the application.**

![](image)

10. **Developer Information**: Enter your name and a valid https URL. This will appear with the application description as who has created this application.

![](image)

11. **App URLs**: Provide the links to your privacy statement and terms of use.

![](image)
12. **Branding:** Provide an icon for your application.

13. After successfully providing the information, Select **Bots** from the left panel under **Capabilities.** Click **Set up** to install the bot.

14. When you click **Set up,** a window as shown below will open. In New bot, give the name of the bot. Select the following:
   - Under Messaging bot, select **My bot supports uploading and downloading files.**
   - Under Scope, select **Personal.**
15. Click **Create bot**. The following screen appears.

16. Store the **Bot name** and **Bot ID**. Bot ID is a Microsoft App ID and will be needed when you configure the application in Qlik Insight Bot.

17. **App Passwords**: Click **Generate new password** for the application. Store this password. This will be needed for the Microsoft App Password when you configure the application in Qlik Insight Bot.

18. Under **Messaging endpoint**, type **https://<QIB-Host>:4434/api/messages**. A Server URL must be publicly accessible URL of a server on which Qlik Insight Bot Service is to be installed.
19. After successfully adding the information, Select **Test and distribute** under **Finish** in the left panel.

20. Click **Install**. This will install the bot.

Now, your bot should be configured with Qlik Insight Bot and ready to use.
3.3 Add Qlik Insight Bot in Microsoft Teams

1. Click “New chat” icon.

2. Enter Microsoft App ID/Bot ID of a bot for which you enabled Microsoft Teams in Azure (refer Step-8 of Creating Bot in Azure document) or enabled from App Studio as mentioned in Step-16 under Configuration in App Studio.
3. Select the bot application.

4. Now you may start a conversation with the bot.
4. Configuring Skype for Business Online

Create a user in Office 365

First, you must create a user in the Office 365 environment. This user will be a Bot user.

1. Login to Office 365 using an admin account.
2. Under Apps, select Admin.
3. From the User management section, select Add User.
4. Fill in the appropriate information for the new user.
5. Under **Password**, select **Let me create the password** and enter a password. Uncheck **Require this user to change their password when they first sign in**.

6. Under **Product Licenses**, assign a **Skype for Business Online** license to the user.
7. In Role section under the **Optional Setting**, make sure **User (no administrator access)** option is selected and click **Next**.
8. Click **Finish adding**.

*Note: It will take an hour to active a user after creating.*

Create an application in Azure

The application created in Azure will be used to authorize the bot user.

1. Login to [Azure Portal](#) to create an application for Skype for Business Online, and click **Azure Active Directory** under Favorites on left pane.
2. **Click App registrations**, under Manage.

3. **Click New registration** to create new application.

4. **Enter below details for application.**

<table>
<thead>
<tr>
<th><strong>Name</strong></th>
<th><strong>Application Name</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Supported account type</strong></td>
<td>Select 1st option.</td>
</tr>
<tr>
<td><strong>Redirect URL</strong></td>
<td>Leave it blank. As this is optional, no need to add redirect URL.</td>
</tr>
</tbody>
</table>
5. Copy the Application ID and store it. It will be used later when you configure Qlik Insight Bot.
6. Click **API Permissions**.

7. Select **Skype for Business** by clicking **Add a permission**.

8. Click **Delegated permissions**.
9. Click **expand all** select all permissions. Make sure you have selected all check boxes.

10. Click **Grant consent**. This will grant permissions to users in your organization.
11. Click **Authentication** and scroll down to **Advanced settings**.

12. Make default client type to **Yes** to treat application as a public client.

Click Save. The **Bot** application should now be created successfully.

Add **Qlik Insight Bot** in **SFB Online**

Login to SFB, search for the bot user which we created earlier in Office 365 and start the conversation.
5. Configuring QIB Extension in a mashup

To use Qlik Insight Bot in mashups, you must add an extension in the Qlik Sense environment. Below are the steps to enable the QIB extension in mashups.

5.1 Include the QIB Extension in the mashup

1. Create a new html division with class "qui-buttonset-right". A sample code is shown below.
   
   ```html
   <div class="qui-buttonset-right"></div>
   ```

2. To control the appearance, create a style with id "#QIBBtnV2". A sample code is shown below.
   
   ```html
   <style>
   /*Apply style in extension button*/
   
   #QIBBtnV2 {
       position: relative !important;
       float: right !important;
       top: 10px !important;
       font-family: sans-serif !important;
   }
   </style>
   ```
Configuring QIB Extension in a mashup

Below is a sample code for mashup to include QIB extension.

```html
<html><head>
    <style>
    /* Apply style in extension button */
    #QIBBtnV2 {
        position: relative !important;
        float: right !important;
        top: 10px !important;
        font-family: sans-serif !important;
    }
    </style>

    <!-- Code for insert extension button -->
    <div id="popup">
        <button type="button" class="close" data-dismiss="modal" aria-label="Close"
            id="closePopup"><span aria-hidden="true">+</span></button>
        <p id="popupText">Close</p>
    </div>
</head>
<body style="overflow: auto">
    <div id="CurrentSelections" class="qvobjects"
        style="position:relative; top:0; left:0; width:100%; height:35px;"></div>
</body></html>
```
Configuring QIB Webchat Hub in Mashup

6. Configuring QIB Webchat Hub in Mashup

Qlik Insight Bot Webchat on hub enabled in the Qlik Sense Environment. Below are the steps to enable the QIB webchat hub in Mashup.

1. Include below mentioned file location as parameters in `require` function in mashup js.
   a. hub/external/insight-bot/web-chat-hub.js
   b. hub/external/insight-bot/web-chat-auth.js

   Below is the sample code for the same
   ```javascript
   require(['"js/qlik","hub/external/insight-bot/web-chat-hub"'], function (qlik, init, bot){
   ```

2. Add below code in the mashup html

   ```javascript
   init($,bot,config);
   ```

   Below is the sample mashup html.
   ```javascript
   var prefix = window.location.pathname.substr( 0, window.location.pathname.toLowerCase().lastIndexOf( "/extensions" ) + 1 );
   var config = {
     host: window.location.hostname,
     prefix: prefix,
     port: window.location.port,
     isSecure: window.location.protocol === "https:"
   }
   require.config( {
     baseUrl: ( config.isSecure ? "https://" : "http://" ) + config.host + (config.port ? ":" : "") + config.prefix + "resources"
   } );

   require(['"js/qlik","hub/external/insight-bot/web-chat-hub"'], function (qlik,init,bot){
     qlik.setOnError( function ( error ) {
       $( '#popupText' ).append( error.message + "<br>" );
       $( '#popup' ).fadeIn( 1000 );
     });
     $( "#closePopup" ).click( function () {
       $( '#popup' ).hide();
     });
     var config = {'url': window.location.origin+':4431'};

     //Start QIB hub code
     init($, bot, config);

     var app = qlik.openApp(<APP ID>, config);
   })
   ```

**Note:** `window.location.origin`: need to change if Qlik Sense and QIB Webchat Service are on separate servers.

If you are using Qlik Sense June 2019 and want to integrate Qlik Insight Bot in mashup, download a zip containing below files from Configuration Application and put them at “C:\Program Files\Qlik\Sense\Client\hub\external\requirejs” location.

- configuration.js
- webchatauth.js
- webchathub.js
7. Configuring a Direct Line channel with Azure

1. Go to [Azure Portal](https://portal.azure.com), select a bot you want to configure.

2. Select **Channels** under **Bot Management**.

3. Scroll down to **Add a featured channel**, select **Direct Line**.
4. Click **Add new site**.

5. Add a reference name, and then click **Done**.

6. You will see the **Secret Keys**. Click **Show** to see the secret key. Save the Secret key to somewhere in a file and then click **Done**. This will be used to configure the Qlik Insight Bot’s Qlik Sense extension.

Now, Direct Line should be configured with Qlik Insight Bot Web service and ready to use.