



KPImailer

Technical Requirements

Ver 1.0

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What is KPImailer?

KPImailer is a framework-independent progressive web application (PWA) for automating and scheduling html formatted emails with highly parameterizable content from Qlik Sense Enterprise Edition.

The content can be visualizations from Qlik Sense as images in .jpeg format in email's body or attachment and customizable Excel templates with Qlik Sense data from all types of objects as attachments.

KPImailer is exclusively a Windows application.

What are the requirements for KPImailer?

KPImailer is installed as a Windows service either on the Qlik Sense Enterprise server, or on a different machine in the same network as the Qlik Sense server and with access to it for the 4747, 4242 and 443 TCP ports.

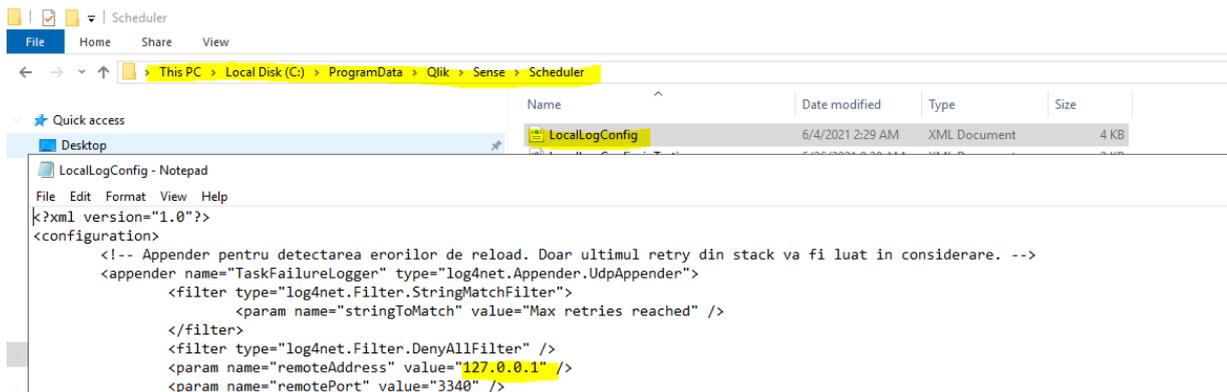
KPImailer services require that the local ports, where KPImailer is installed, 3341 and 3340 to be available, otherwise the services will not start. Also, the machine must allow outbound connections on port TCP 5000 to the Relevance security server.

KPImailer main service - TCP port 3341, KPImailerAlerting - TCP/UDP port 3340.

For Alerting to function properly, if you install KPImailer on a machine **other** than the Qlik Sense instance machine, then you need to manually edit and perform a copy operation for the filename LocalLogConfig.xml, which you will find in the following location:

`%ProgramData%\Qlik\Sense\Scheduler\LocalLogConfig.xml` (you can copy/paste this address in your Windows Explorer)

Edit the parameter named `remoteAddress` in the xml file (highlighted in the image below) and replace it with the IP address of the machine on which KPImailer is installed. After you edit it, save the file, copy it and paste in the same location (`%ProgramData%\Qlik\Sense\Scheduler\`) on the machine on which the Qlik Sense instance is installed.



Hardware resources requirements:

- At least 4GB RAM.
 - At least Intel i3 family processor.
 - Windows server 2012 R2+ or Windows 10.
 - An active internet connection.
- Be advised that the hardware requirements are only for the KPImailer application. The actual hardware requirements needed is highly dependent on the Qlik Sense data model and application and it can't be speculated in this tech requirements sheet.

Soft resources requirements:

- Qlik Sense September 2018 Patch 1 or higher.
- A valid client certificate (client.pfx) **with a password** generated in the QMC (Qlik Management Console) on the Qlik Sense Enterprise server. **See Appendix, section a).**
- A ticket authentication virtual proxy with Windows authentication pattern set up as Forms. Configurable in QMC → Virtual Proxies. **See Appendix, section b).**
- A valid Qlik Sense Enterprise user / domain pair with access to the Qlik Sense applications you need to report from.
- If installed on a machine other than Qlik Sense Server, add firewall rules on the Qlik Sense Server to allow incoming traffic on 4747, 4242 and 443 TCP ports.
- While the KPImailer engine does not need Office installed, there are some capabilities like refreshing pivot caches before saving that will not be available. If you have Office (MS Excel) installed, KPImailer will automatically detect it and proceed accordingly.



How to install KPImailer?

KPImailer is being shipped with a standalone installer with on-screen instructions in a wizard style environment.

What is installed on the target machine?

KPImailer install, besides the required components, two other required components: a named MS SQL Server Express 2017 instance, a KPImailerAlerting Windows service and a KPImailer main Windows Service.

How to uninstall KPImailer?

KPImailer can be uninstalled from the Apps & Features section, like any other Windows application.

What is uninstalled on the target machine?

KPImailer uninstaller will remove the following: the main service database, application folder and files, registry entries.

Are there residues left on the target machine?

Yes, the application folder may contain the logs folder and also the main SQL Express 2017 instance won't be uninstalled by the uninstaller.

What type of client data does KPImailer communicate with the Relevance REST servers?

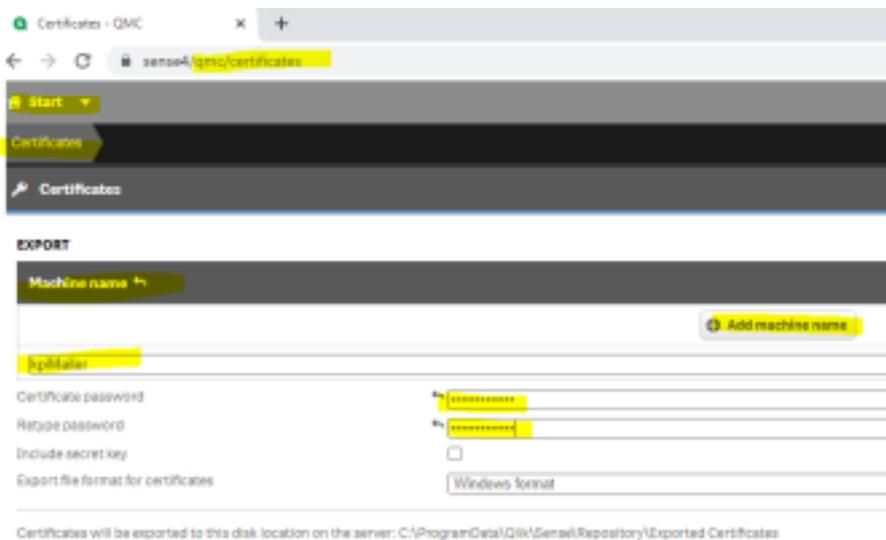
KPImailer needs an active internet connection, with a grace period of 5 days in case of network or other problems that impede the application access to Relevance REST server, to communicate the following client data: licenseID, company name, phone number, contact name.

What is the tech behind KPImailer?

KPImailer is a PWA application built on-top of the latest Microsoft NET 5.0 framework and Blazor.

Appendix

- a. Export a Qlik Sense certificate from QMC.
 - i. Navigate to https://your_server_address/qmc/
 - ii. Navigate to Start → Certificates.
 - iii. Click on Add Machine Name and pick the desired name.
 - iv. Pick a password. This is a required field, KPImailer won't accept certificates with no password.
 - v. Retype the password in the next input field.
 - vi. Click on the Export Certificate button. You will be provided with a location link of the exported certificate.



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b. *Setup a virtual proxy with Forms as Windows Authentication Pattern.* i) *Navigate to https://your_server_address/qmc/*

- i. Navigate to Start → Virtual Proxies.
- ii. Click on Create New.
- iii. Identification section: pick a description and a prefix (the prefix must be unique amongst other Virtual Proxies created). Session cookie header name same, must be unique.
- iv. In the Load Balancing Section click on the Add server node button and select from the next pop-up Central node and click on the Add button.
- v. Now click on the Authentication section from the Properties section in the right side of the Edit virtual proxy window.
- vi. Authentication method - Ticket, Windows Authentication Pattern - Forms.
- vii. Click on the Apply button in the bottom left corner of the window. ix) After clicking Apply, a new section named Associated Items will appear in the right side of the windows. Click on Proxies, under this section.
- viii. In the next window, click on the Link button and a popup will appear. Select the Central node and click on the Link button. After clicking the Link button, the Proxy Service will restart, and you will be asked to log-in again and this concludes the setup of a virtual proxy with Forms as Windows authentication pattern required by the KPImailer.