Analytics Modernization Best Practices

For Qlik Sense Client-Managed

LEAD WITH DATA Qlik

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SUMMARY

This technical brief provides you with an overview of the steps to take to transition from QlikView to Qlik Sense Enterprise Client-Managed. It will take you from configuration, installation and implementation to conversion of your QlikView documents to Qlik Sense applications.

INTRODUCTION

As new demands for BI and analytics come your way, you'll be required to build new applications and support new use cases. This makes now the perfect time to begin using Qlik Sense.

Start with a compatible version of QlikView

We highly recommend upgrading to the QlikView Version 12 (April 2020) release or later to leverage new licensing options, consume QlikView from within the Qlik Sense hub on Qlik Cloud Services (if using the SaaS add on), and experience functional cohesion.

Ensure you have a server provider

Platforms:

- Microsoft Windows Server 2012 R2, 2016 or 2019
  For development and testing purposes only: Microsoft Windows 10 (64-bit version only)

Note: We do not recommend that you install Qlik Sense on domain controller machines, as group policies may prevent Qlik Sense from getting access to required services.

It is not possible to install Qlik Sense on a machine with QlikView Server already installed. For more information on system requirements for Qlik Sense Enterprise, see here.

Configure Qlik Sense Server

Installing Qlik Sense on a single node

A basic installation of Qlik Sense can be done by installing all the Qlik Sense services on a single node. This kind of deployment works best in a single time zone, where data reloads can be completed during off hours. To determine if a single-node installation is the right choice for you, see "Planning your Qlik Sense Enterprise Deployment."

Installing Qlik Sense in a multi-node site

A Qlik Sense multi-node deployment offers more configuration options than single node deployments. In a multi-node site, Qlik Sense services can be distributed across one or more server nodes to optimize scalability and performance.

See the Qlik Sense installation Guide for details on Qlik Sense server installation.

Activate Qlik Sense licenses

Before Qlik Sense can be used, the site license must be applied.

When opening the Qlik Sense Management Console (QMC) for the first time, the site license properties screen is displayed. Enter the license information from the License Enabling File (LEF). The property group site license contains properties related to the license for the Qlik Sense system. All fields are mandatory.

See Qlik Sense installation Guide, page 18, for instructions on activating the licenses.

Governance and security

Use the following instructions to allocate access to users (non-Core-Based licensing). You can connect to a user directory (optional), allocate user access or professional access, and set up permissions. The license is either based on access types, with professional access allocation as an option, or on tokens, with user access allocation as an option.

Access types license (non-Core-Based licensing)

The Qlik Sense license includes several professional access allocations that are used to grant user access to Qlik Sense. Proceed with the following: In the QMC, from the Start menu, click License management. The License usage summary screen is displayed. Click the Professional access allocations tab. Click the + Allocate button. The User's screen is displayed. Select the users that you want to provide access to from the list and click Allocate.

See Qlik Sense installation Guide, page 19, for further details on allocating users.

Create your transition strategy

Your migration strategy should include an assessment of your QlikView documents. This can help you to decide whether to:

1) Retire the document.

2) Maintain and distribute the document in QlikView.

3) Migrate the document to Qlik Sense.

For more information, see the documentation on Moving QlikView content to Qlik Sense: concepts and best practices – Qlik Sense on Windows.

Use the Governance Dashboard to review apps and decide which to convert

The Governance Dashboard provides QlikView administrators and developers visibility into their QlikView deployments by displaying metadata collected from QVW, QVD, and QVX files and QlikView Server and QlikView Publisher log and configuration files. The Governance Dashboard can show aggregate governance data for disparate Server/Publisher clusters or nodes.

Users and administrators configure data governance scan profiles through the QlikView Desktop interface. This profile scan includes:

- A list of directories containing QVW and QVD files, optionally using regular expression patterns to exclude certain content
- A directory containing QlikView Server log files

- A directory containing QlikView Publisher log files
- A directory containing the path to a QlikView Repository

For more information, see the documentation on <u>What is the Governance Dashboard? – QlikView Governance Dashboard</u>

Convert a QlikView document into a Qlik Sense application

The QlikView converter is a tool that supports the conversion of QlikView documents (QVW files) to Qlik Sense apps. Leverage the tool to move some of the valuable analytics developed in QlikView to Qlik Sense.

The converter tool can be used in the Dev Hub in Qlik Sense Enterprise and Qlik Sense Desktop. For more information on the Conversion Tool, see <u>here</u>.

You will need to analyze your QlikView documents and prepare them for conversion. The amount of work involved depends on the complexity of your QlikView documents, and the type of objects they contain. You then generate the basic Qlik Sense app and set up the sheets and visualizations you require.

If you have already analyzed and prepared your QlikView documents, you can go straight to the section on creating applications.

To use the converter tool, make sure your system and setup conform to the following requirements:

- Qlik Sense Desktop or Qlik Sense Enterprise, version 3.2 or later.
- The QlikView document that you want to convert was created in QlikView 11.20 or later. You do not require QlikView to convert the QVW file.
- The maximum size of QlikView document you can convert using the converter tool is 500 MB.
- In Qlik Sense Enterprise, access rights are required to create apps.
- Security rules, example: Applying Qlik Sense access rights for user types
- In Qlik Sense, you need the same access rights to recreate the data connections as were required for the data in the original QlikView app.
- Creation of access rights for data connections

See here for more information on <u>Using the QlikView converter to create a Qlik Sense app.</u>

The QlikView converter will move most objects into Qlik Sense, including:

- Scripts
- Most variables. See QlikView variables excluded from export
- List boxes
- Charts and tables

The converter cannot convert certain objects. Objects that cannot be converted include the following:

- Containers
- Triggers
- Macros
- Conditional statements

- Text boxes
- Object layers
- Custom chart colors
- Expressions in list boxes

Develop new apps in Qlik Sense

To create a new app, follow the steps:

1. Click **Create new app** in the hub.
2. Give your app a name.
3. Click **Create**.
4. The app is created
5. Click **Open app**.
6. The app opens in the app overview.

Add data to the new application

Qlik Sense apps contain data and use visualizations to explore that data. You can easily make discoveries by applying selections to visualizations.

The foundation of an app is the data model and load script. Measures and dimensions are reusable data items used to build charts. Sheets and stories display and organize your visualizations. Bookmarks are an easy way to save a specific selection state on a sheet.

Whoever creates an app is automatically designated as its owner. An app can be re-used, modified, and shared with others, depending on access rights. Different actions can be carried out depending on whether the app is published or not. You can find more information in Qlik Help.

Qlik Data Connectors in Qlik Sense

Qlik Sense lets you connect to your data, wherever it is stored, with a wide range of Qlik Connectors and other data connection types.

When you create a data connection it is saved to Qlik Sense, so you can quickly select and load data from the data sources that you commonly use. Connect to databases, social media data, local files, remote files, and web files.

To select data from a data source, you can either create a new data connection or use a saved data connection. You can create data connections and access your saved connections from:

- **Add data** to the data manager
- **Data connections** in the data load editor

Connecting to data sources

Backup QlikView Server and decommission

To Perform a Complete/Clean Uninstall Of QlikView, we recommend you first
take a backup of all the QlikView folders, so you can recover your previous installation if necessary.

Training and resources

Moving QlikView content to Qlik Sense: concepts and best practices
Qlik Continuous Classroom: Learning Plan Moving from QlikView to Qlik Sense

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About Qlik

Qlik's vision is a data-literate world, where everyone can use data and analytics to improve decision-making and solve their most challenging problems. Qlik provides an end-to-end, real-time data integration and analytics cloud platform to close the gaps between data, insights and action. By transforming data into active intelligence, businesses can drive better decisions, improve revenue and profitability, and optimize customer relationships. Qlik does business in more than 100 countries and serves over 50,000 customers around the world.

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