



**PERSPECTIVE FOCAL POINT
INSTALLATION GUIDE**

Version 1.2

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Perspective by Resolver Inc.™

Focal Point Version 1.2

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Table of Contents

Overview	1
Minimum System Requirements	1
Pre-Install.....	3
QlikView Server Setup	4
Required Components	4
Installation.....	4
Configuration	6
Login Portal Setup	13
Validation Sequence.....	13
Required Components	14
Installation.....	14
Perspective Focal Point Data Reload Setup	17
Configuration	17
QlikView Analyzer Plug-in Setup	21
Installation.....	21
Contact Information	24
Technical Support.....	24
Resolver Inc.....	24

Overview

Perspective Focal Point™ is a business intelligence application powered by QlikView™. QlikView's in-memory data analysis technology helps Focal Point create and present advanced statistical reports and actionable business intelligence from Perspective's incident, investigation, and case data.

Note: This document is only applicable to organizations that have purchased Perspective Focal Point, an optional add-on to Perspective by Resolver. If you are not certain that your Perspective system includes Focal Point, please contact Customer Service for verification.

To get Perspective Focal Point up and running, you must first set up the elements outlined in the 'Pre-Install' section of this guide; then, using the instructions provided in the subsequent sections, complete the installation and/or configuration of the following pieces:

- The QlikView Server that manages Perspective Focal Point's data and on-the-fly calculations, and makes the information available via Web browser.
- The login portal that connects Perspective™ to Focal Point.
- The QlikView Server's data reload schedule that specifies the dates, times, and frequency at which the latest information from Perspective is brought into Focal Point.
- The QlikView Analyzer plug-in that allows users to access Perspective Focal Point from their client machine's Microsoft® Internet Explorer® browser.

Minimum System Requirements

Client Machine

Operating System

- Minimum: Windows® Vista SP 2
- Recommended: Windows 7 SP 1

Web Browser

- Minimum: Internet Explorer 7.0
- Recommended: Internet Explorer 9.0

Third Party Application

- QlikView Analyzer Plug-in for Internet Explorer

Web Services Server

Available Disk Space

- 1 GB

Note: Depending on the size of your Perspective database, more disk space may be required.

Processor Speed

- Minimum: 1.5 GHz
- Recommended: 3 GHz+

Memory

- Minimum: 2 GB for Windows Server® 32 bit; 4 GB for Windows Server 64 bit
- Recommended: 4 GB+

Note: Depending on the size of your Perspective database, more memory may be required.

Operating System

- Minimum: Windows Server® 2008 with SP 2 64 bit
- Recommended: Windows Server® 2008 R2 SP 1 64 bit

.NET Framework

- Version 2.0
- Version 4.0

IIS (Internet Information Services)

- Minimum: IIS 7.0
- Recommended: IIS 7.5

QlikView Server

- Minimum: 64 bit Version 9 SR 2
- Recommended: 64 bit Version 9 SR 2

Note: A limited QlikView Server license is included with Focal Point.

Web Browser

- Minimum: Internet Explorer 7.0

Third Party Application

- Microsoft® Excel®

User

- Create a user with Administrator rights for Focal Point service.

Pre-Install

Ensure the following elements are set up before proceeding with the full installation of Focal Point:

- Perspective Premium Version 2.1.1 or higher must be running, configured, and accessible to the network with a valid and up-to-date database.
- IIS Version 7.0 or higher must be running on the web server hosting Focal Point.
- .NET Framework Version 4.0 must be installed on the web server hosting Focal Point.

Note: If you are upgrading from Perspective Focal Point Version 1.0, you must completely uninstall existing versions of Perspective Focal Point, QlikView Server and the QlikView Analyzer Plug-in from all client machines before proceeding with the following instructions

QlikView Server Setup

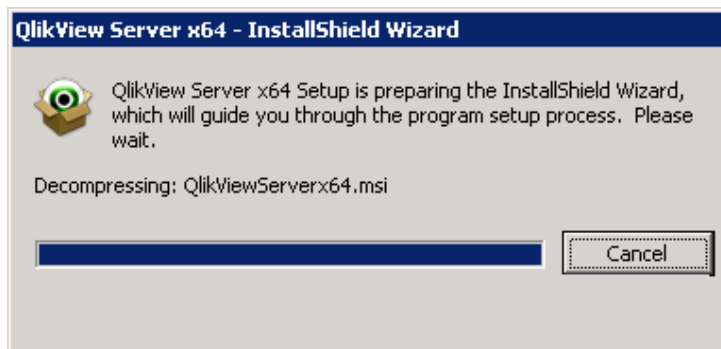
The QlikView Server (QVS) is the engine that hosts the Perspective Focal Point application. QVS publishes QlikView applications (.qvw files), including Perspective Focal Point, for access over a network.

Required Components

- **QlikViewServer_x64Setup.exe**—This file can be found in the QlikView Server Setup directory within the installation folder.
- **Perspective Focal Point Application Files**—This folder can be found in the QlikView Server Setup directory. It contains the Perspective Focal Point application file (.qvw file) and a folder called 'Data' which contains a configuration file (.xls file).
- **Perspective Focal Point License**—This key is a limited QlikView Server license for use only with the Focal Point application included with this install.
- **Windows user:** You must create a Windows user before you can install Focal Point.

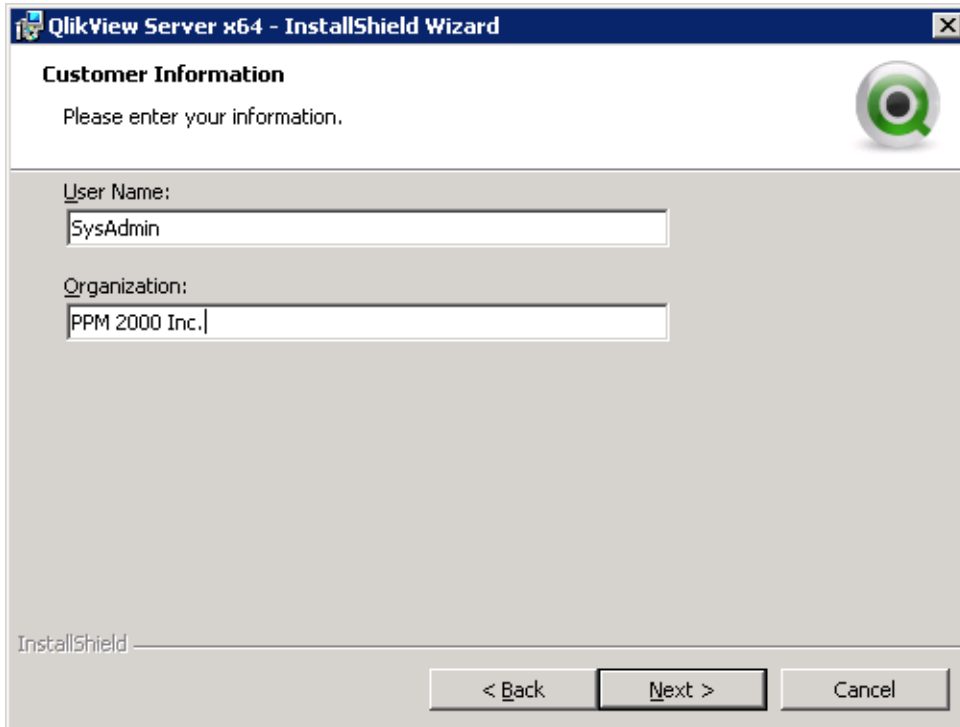
Installation

1. From the installation files, run the QlikViewServer_x64Setup.exe (as an Administrator) setup file.

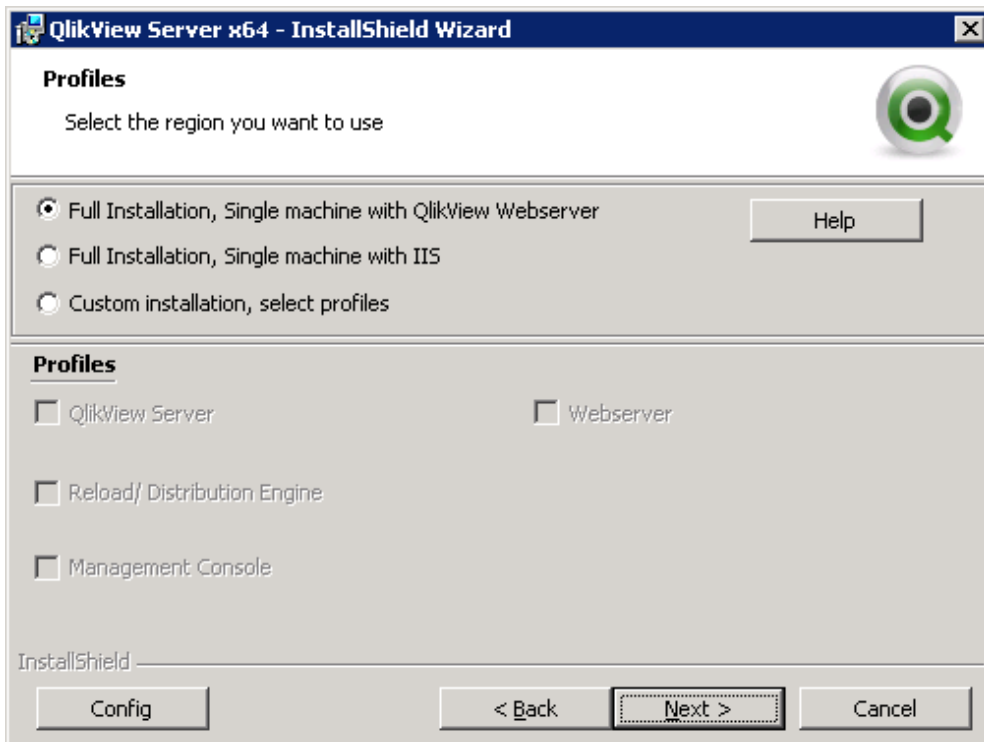


2. Click Next.
3. Select your country or region, and click Next.
4. Select the 'I accept the license agreement' option, and click Next.

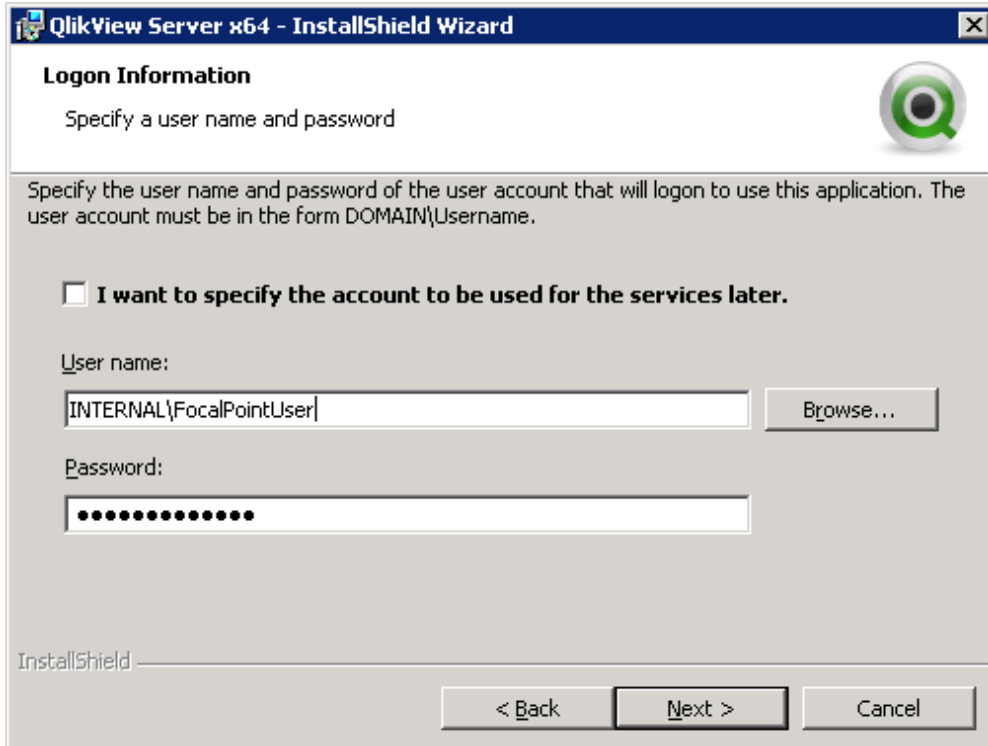
5. Enter the User Information for QlikView Server, and click Next.



6. Click Browse to change the default install location, or click Next to continue.
7. Select 'Full Installation, Single machine with QlikView Webserver', then, click Next.



8. Enter the user credentials for the Administrator level account that will be used to run the services required for QlikView Server; then, click OK.



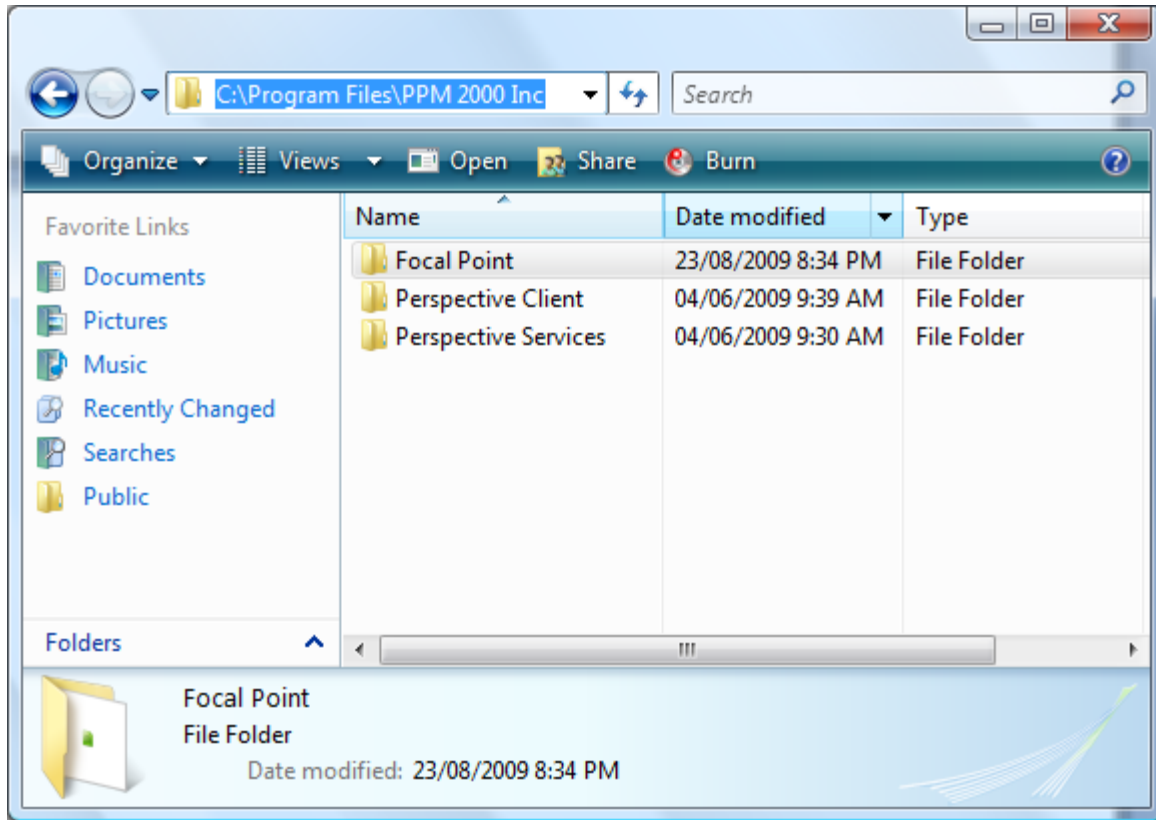
The screenshot shows a Windows dialog box titled "QlikView Server x64 - InstallShield Wizard". The dialog is titled "Logon Information" and contains the following elements:

- A header section with the text "Specify a user name and password" and a QlikView logo icon.
- Instructions: "Specify the user name and password of the user account that will logon to use this application. The user account must be in the form DOMAIN\Username."
- An unchecked checkbox with the text: "I want to specify the account to be used for the services later."
- A "User name:" label followed by a text input field containing "INTERNAL\FocalPointUser" and a "Browse..." button.
- A "Password:" label followed by a password input field filled with dots.
- A footer area with the "InstallShield" logo and three buttons: "< Back", "Next >", and "Cancel".

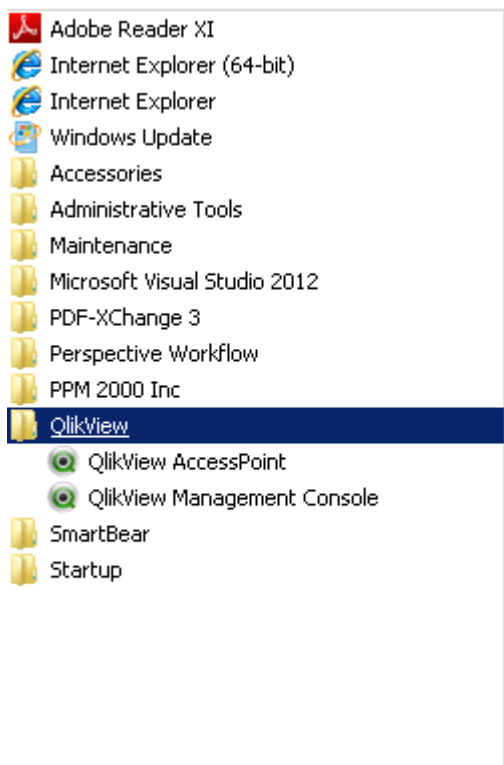
9. Leave 'Use QlikView Administrators Group' selected by default, and then click Next.
10. Click Finish to complete the installation, then click Install to begin the installation.
11. Wait while the installation completes.
12. Click Finish to complete the installation.
13. Restart your operating system to enable the QlikView Server.

Configuration

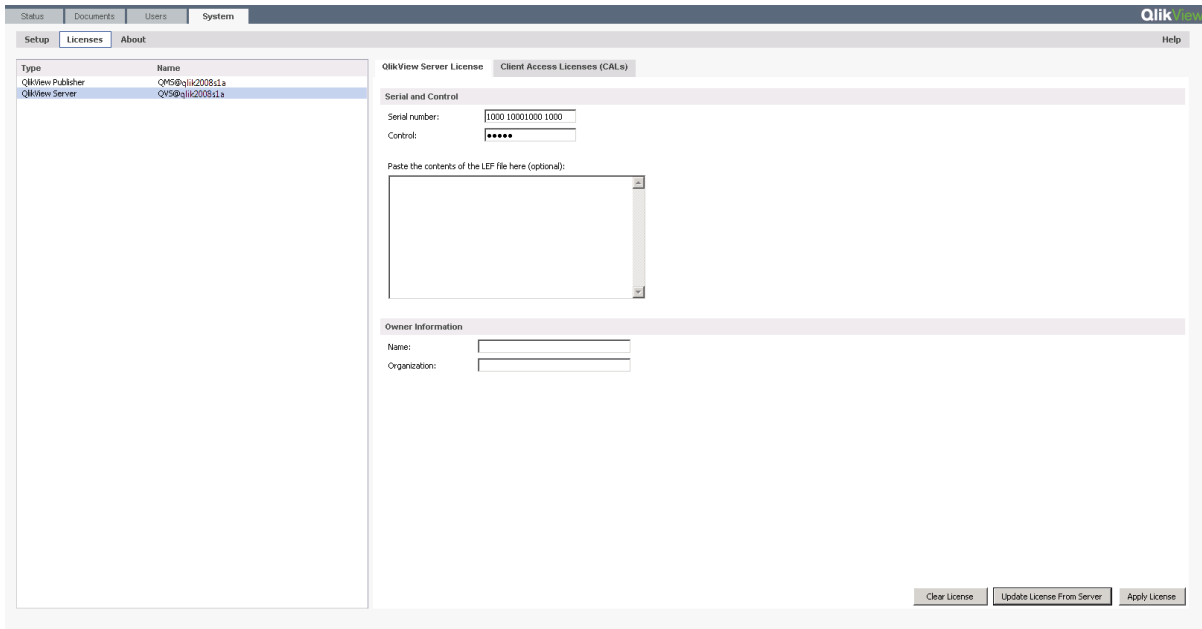
1. Copy the Focal Point application file to a local directory on the server.



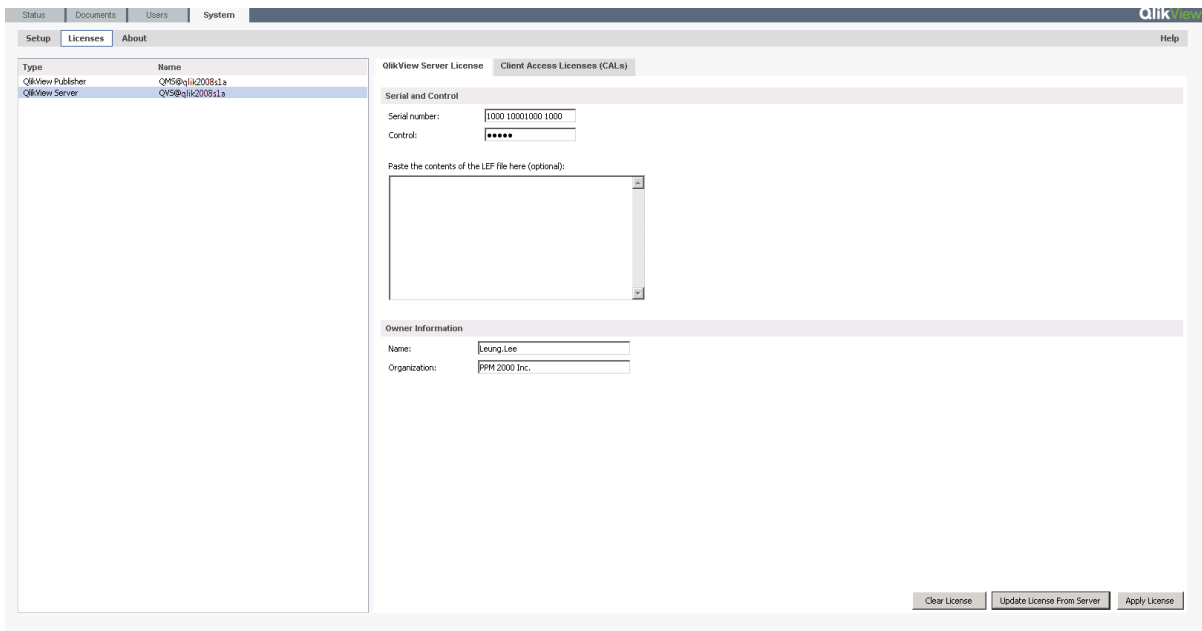
2. Launch QlikView Management Console from the Start menu.



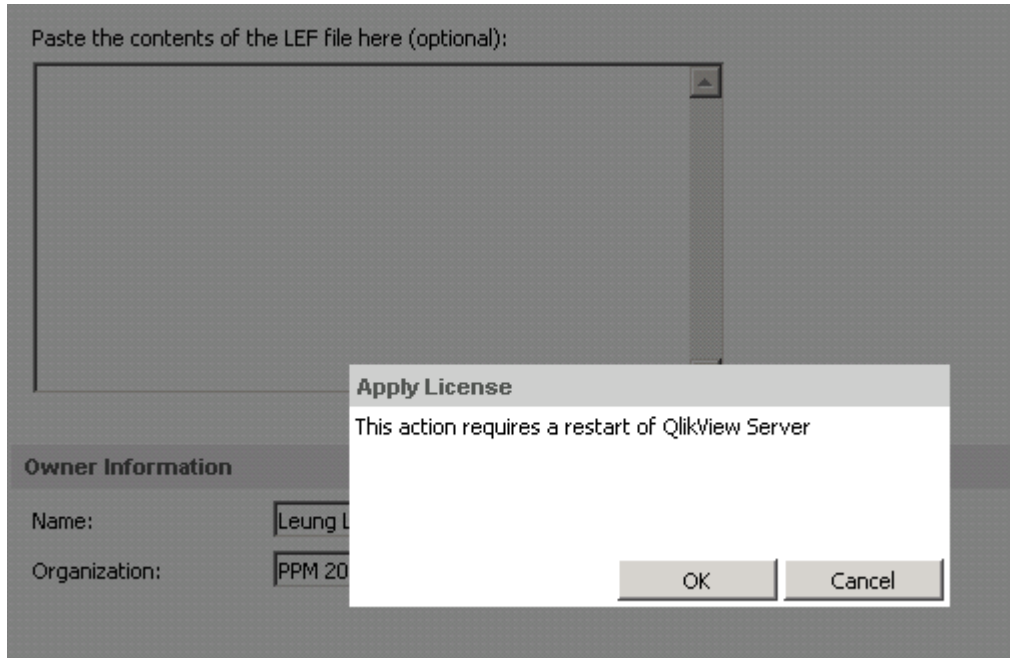
3. Select the Licenses tab. Under the System > Licenses > QlikView Server > QlikView Server License sub-tab, enter the Serial and Control numbers.



4. In the Owner Information section, enter your Name and Organization, and then click the Apply License button.

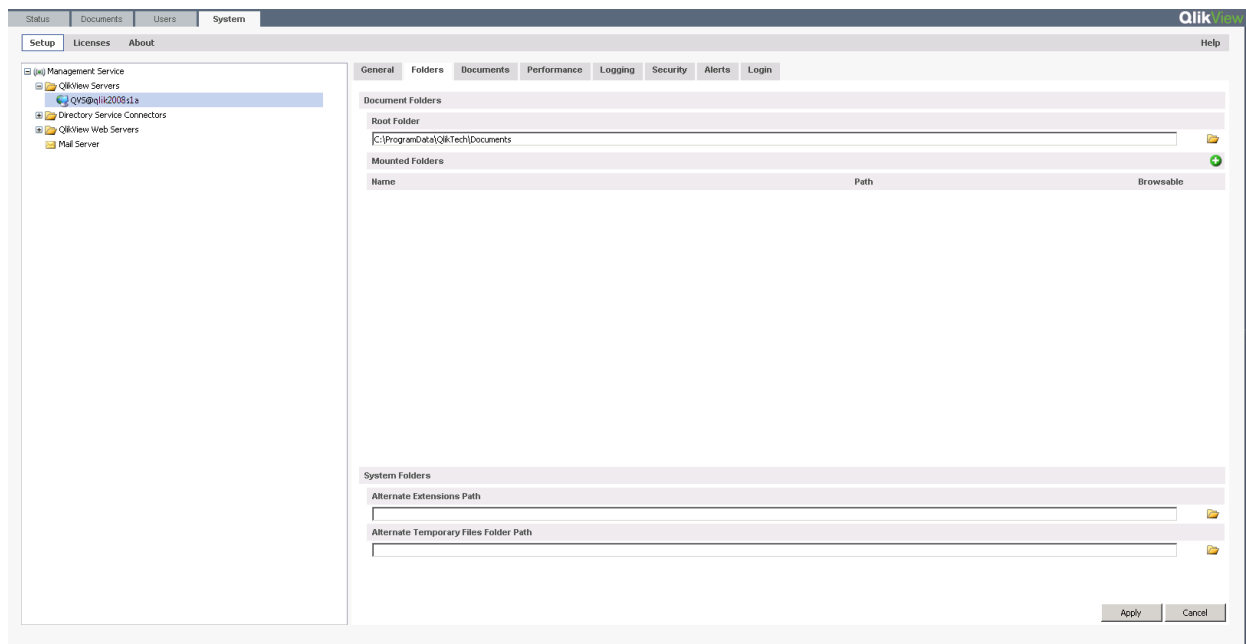


5. Click OK.

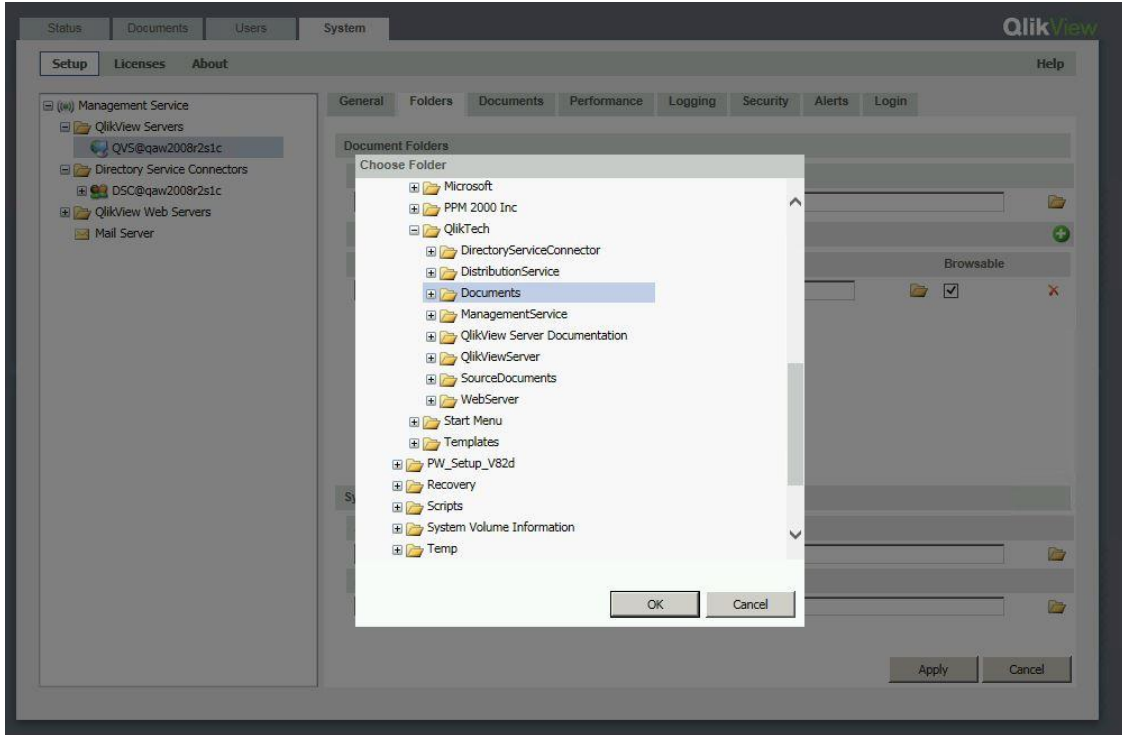


6. Select the Folders sub-tab. Under the System > Setup > QlikView Servers – QVS@qaw2008r2s2a > Folders sub-tab. Add a Mounted Folder by clicking the green plus sign on the right side.

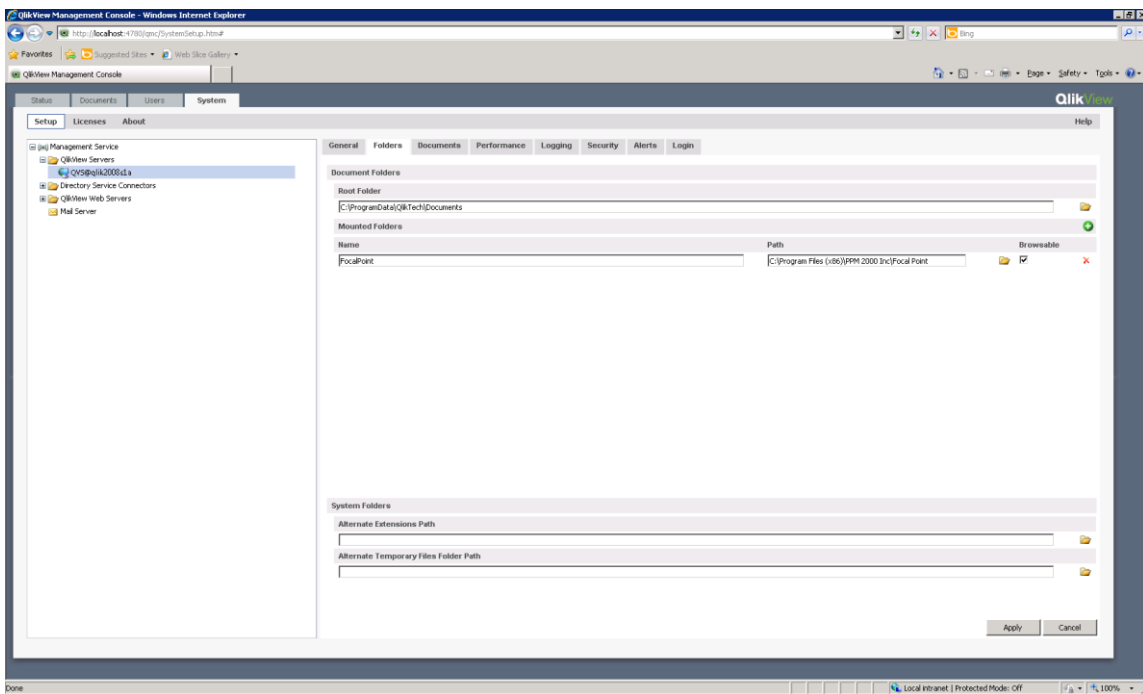
Note: Root Folder is populated automatically and may vary depending on your operating system.



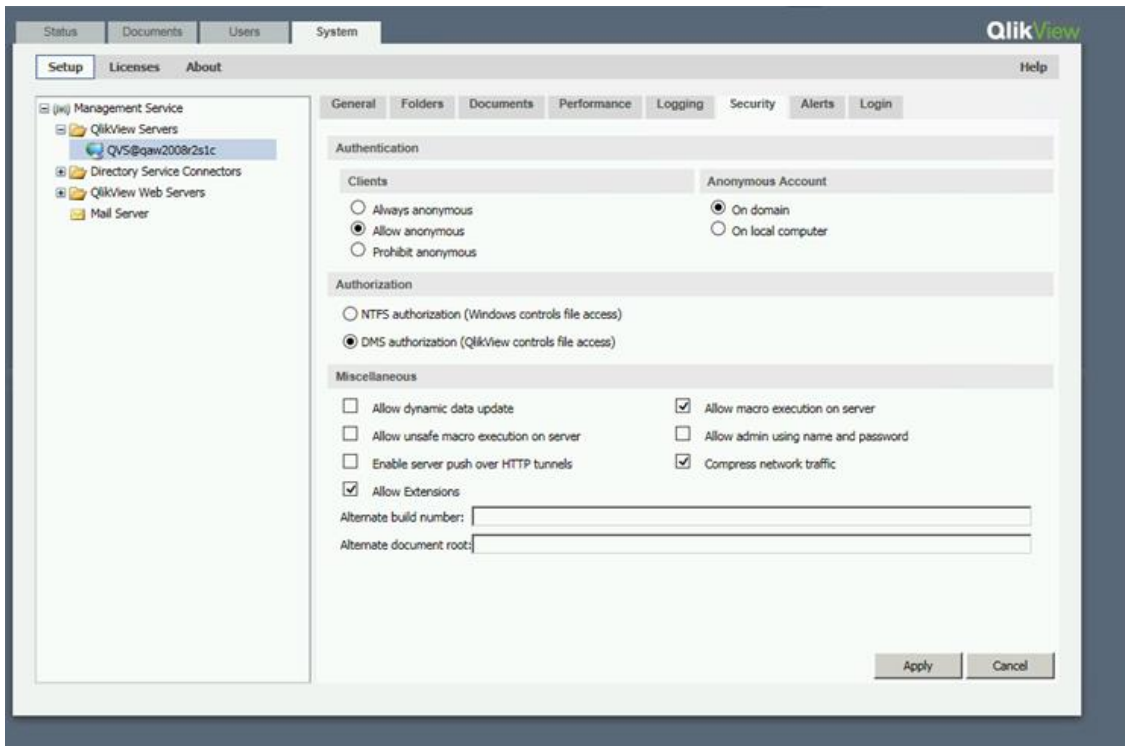
7. In the Name and Path fields, enter the folder name you used in step 1 (spaces cannot be used), and enter the directory path to the Focal Point application files (or use the folder button to select the directory path); then click OK.



8. Click the Apply button.



9. Go to the Security tab, and make sure DMS authorization (QlikView controls file access) is selected.
10. Click the Apply button.



11. Close the QlikView Server Management Console.
12. Browse to the location of the Focal Point application's Data folder, and open the config.xls configuration file.
13. Edit the Config tab for the following values:
 - **LoadStartYear**—Enter the first year of data to load.
 - **LoadEndYear**—Enter the last year of data to load.
 - **LoadNumberOfYears**—Alternatively, you can enter the number of years of data to load, with the current year's data being the last year loaded.
 - **DescriptionMaxLength**—Enter the number of characters to load for summary and description fields.
 - **DatabaseServerName**—Enter the name of the SQL Server® hosting the Perspective database.
 - **DatabaseName**—Enter the name of the Perspective database.
 - **SQLLoginID**—Enter the SQL login name for data connection.
 - **SQLLoginPassword**—Enter the SQL login password for data connection.

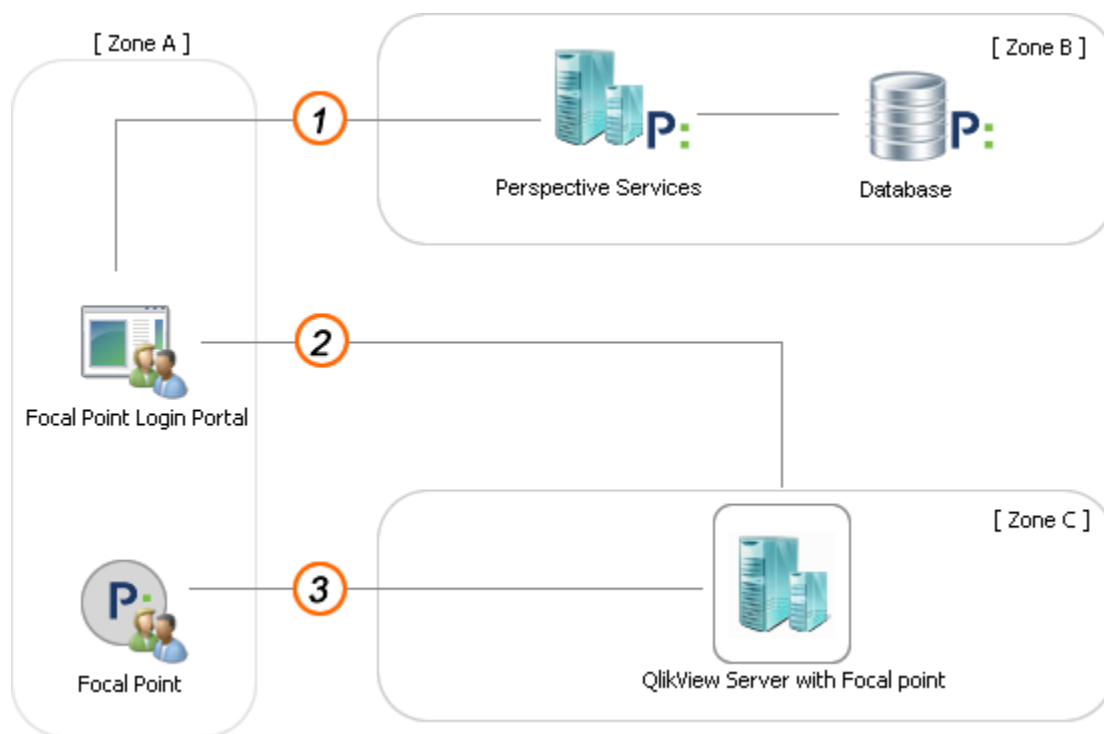
- **LoginMode**—Enter Database, NT, or Mixed to indicate the method of user authentication that Focal Point will employ.
 - **FiscalMonthShift**—If reporting on your organization’s fiscal year is required, enter the numeric value that corresponds to the last month of your organization’s fiscal year. For example, if your fiscal year starts in May, then the end of April (the fourth month of the calendar year) will mark the shift to a new fiscal year; in this case, you would enter ‘4’ for the FiscalMonthShift.
 - **EmptyString**—Enter a string to use as a place holder for NULL values.
 - **DefaultDateField**—Choose IncidentOccurred or IncidentReported as the default date field for Focal Point’s charts.
 - **DefaultDateMode**—Choose Calendar or Fiscal to indicate whether dates should be based on the calendar or fiscal year.
 - **ServiceAccount**—Select the appropriate service account.
14. Save and close the config.xls file.

Login Portal Setup

The Focal Point login portal validates the user against the Perspective database and passes control over to the QlikView Server where Focal Point is published. In order for the Focal Point login portal to function correctly, you will need three pieces of information: Perspective Service URL, Database ID and QlikView Server URL.

Validation Sequence

1. Obtain User Name and Password, and validate the information in the Perspective database.
2. If validated successfully, request QlikView Server to execute Focal Point.
3. Present the Focal Point user interface to the end user.



The preceding diagram illustrates the validation sequence used when a user’s login information is successfully validated against the Perspective database.

Required Components

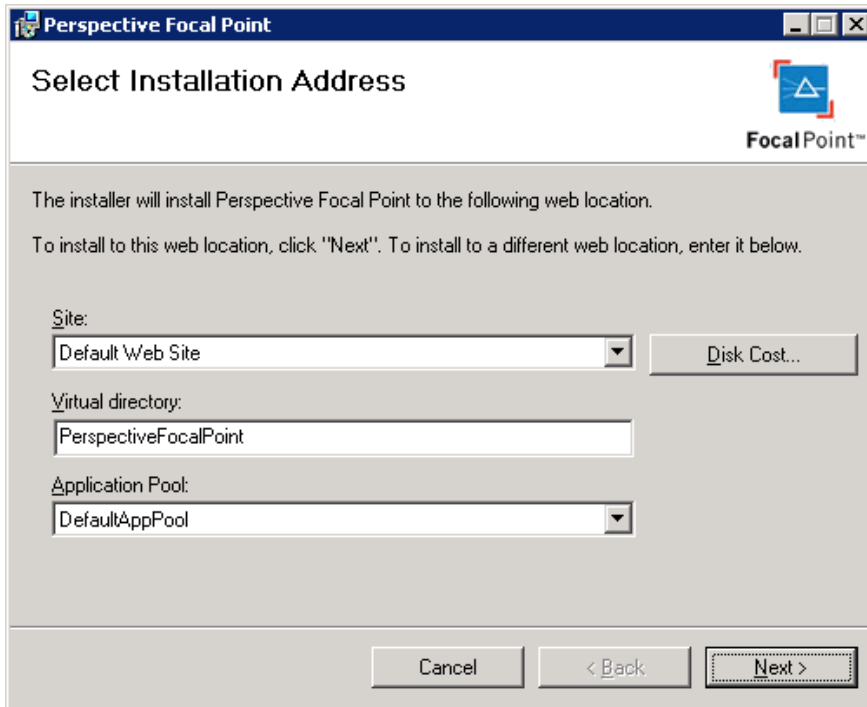
- **Web Portal Installation Files**—These files can be found in the Web Portal Setup directory.
- **Perspective Service URL**—This URL indicates the location of the Perspective database that contains valid user IDs and passwords (illustrated in Zone B of the Validation Sequence figure). This is the same URL used for logging in to Perspective: *https://<servername>/PerspectiveServices/service.asmx*
- **Database ID**—The Database ID indicates the name of the Perspective database that contains valid user IDs and passwords (illustrated in Zone B of the Validation Sequence figure). The Database ID can be found on the Perspective logon screen. If no database is indicated on the Perspective logon screen, then the Database ID is 'default'.
- **QlikView Server URL**—This URL indicates the location of the QlikView Server and the Focal Point application file (illustrated in Zone C of the Validation Sequence figure). For example: *qvp://ServerName/MappedFolderName/PerspectiveFocalPointv1.2.qvw*.
- **Business ID**—The Business ID value should always be entered as 'Default'.

Installation

1. From the Web Portal installation files, run the setup.exe file.
2. Click Next.

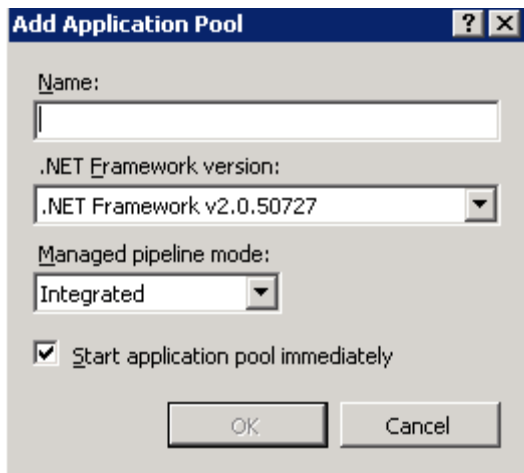
Select the 'I Agree' option, and click Next.

Verify the Web Site, Virtual Directory and Application Pool where the Focal Point login portal will be installed, making changes if necessary, and click Next.



- Create an Application Pool if one is not available already.

Navigate to IIS and right-click the application pools, then select Add Application Pool.

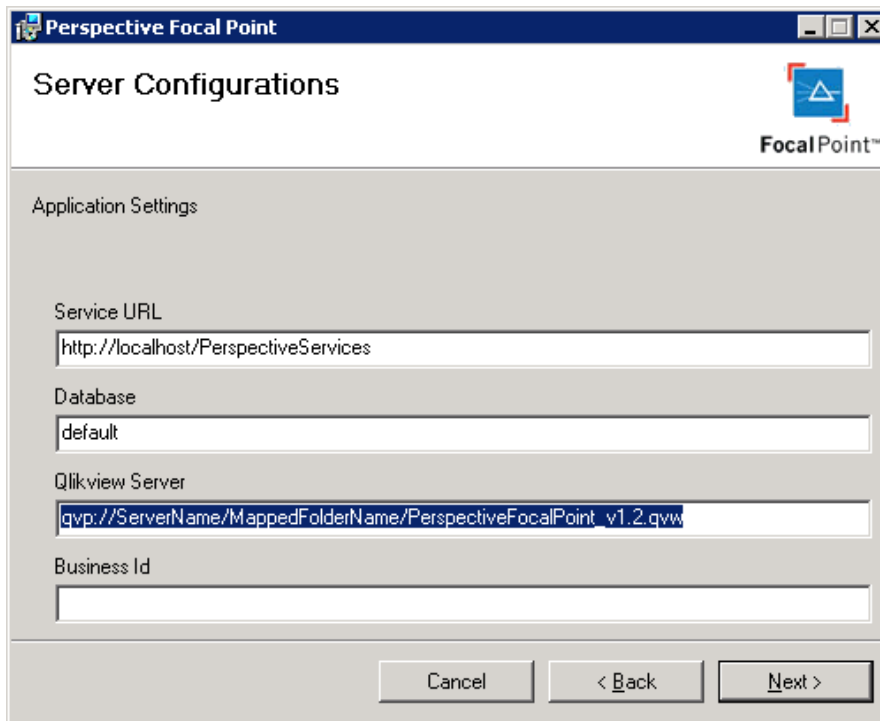


Provide a Name to the application pool (e.g., FocalPointPool).

The Pool will be created in IIS. Now, select the Pool and right-click it. Go to Advance Settings and set the field (Enable 32-bit Applications) to **False**.

Note: If .Net Framework 2.0 isn't available, it must be installed prior to the installation of Focal Point.

3. Enter the Perspective Service URL, Database ID, QlikView Server URL and Business ID (if required); then, click Next.



The screenshot shows a Windows-style dialog box titled "Perspective Focal Point" with a subtitle "Server Configurations". The dialog box contains a section for "Application Settings" with the following fields:

- Service URL:
- Database:
- Qlikview Server:
- Business Id:

At the bottom of the dialog box, there are three buttons: "Cancel", "< Back", and "Next >". The "Next >" button is highlighted, indicating it is the next step in the installation process.

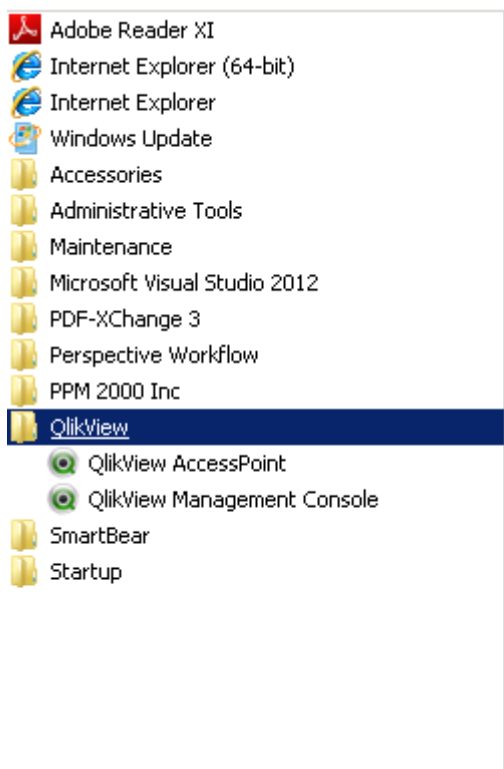
4. Click Next to begin the installation.
5. When the installation is complete, click Close.
6. Reset IIS if it was not automatically restarted during the installation.

Perspective Focal Point Data Reload Setup

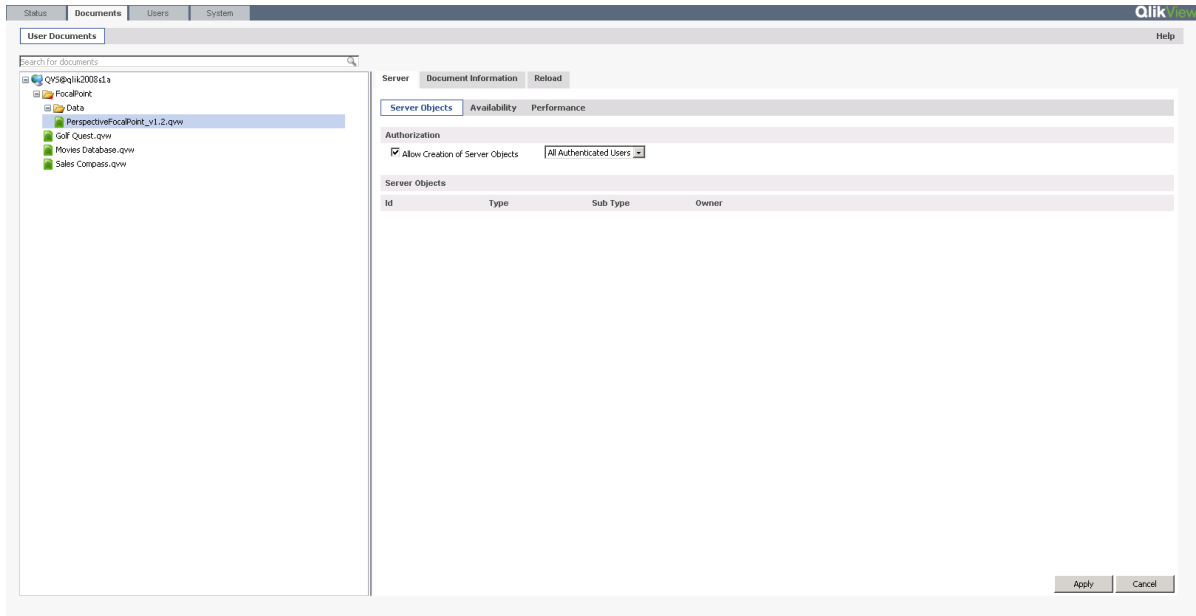
QlikView Server ensures that Focal Point is frequently updated with the latest data from Perspective. QlikView Server will do an initial load of all Perspective data into Focal Point, and then periodically reload to keep Focal Point as up-to-date as required. The frequency of these reloads is specified during the following configuration phase.

Configuration

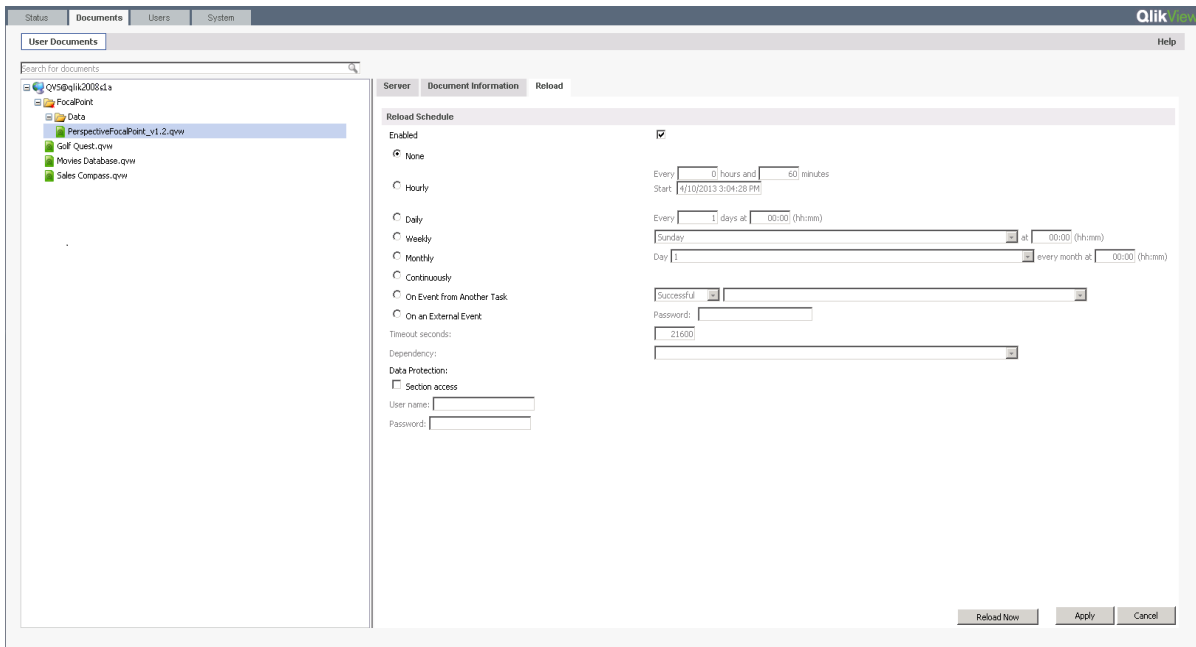
1. Launch QlikView Management Console from the Start menu.



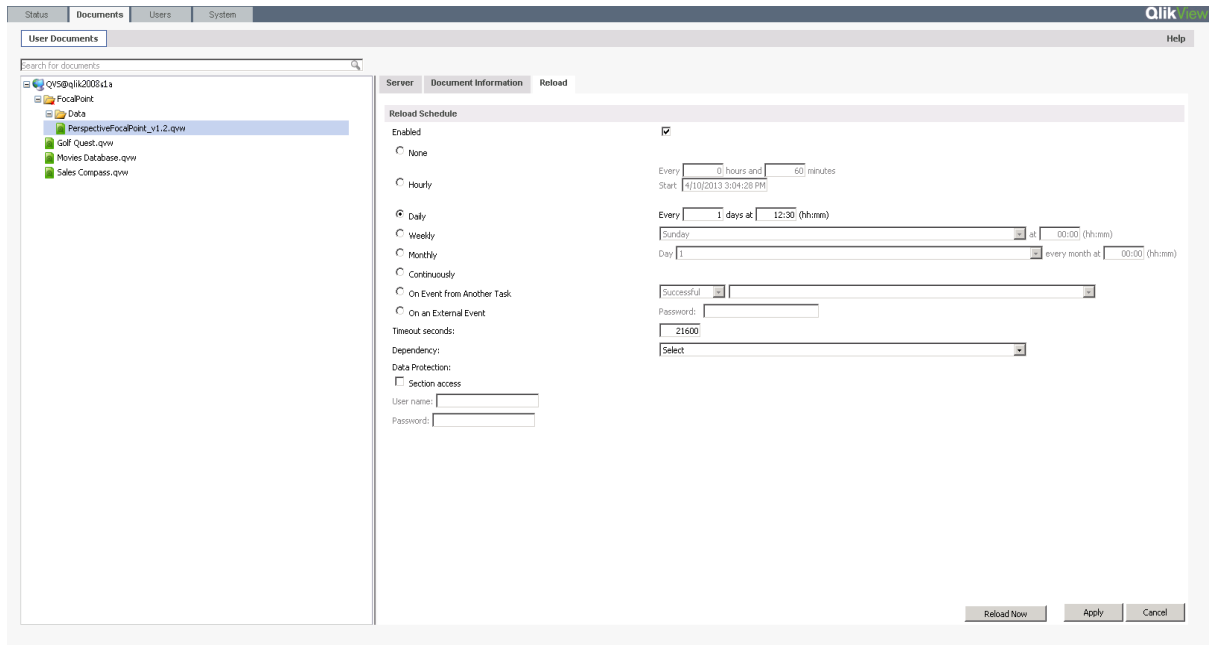
2. Click on the User Documents tab, and select PerspectiveFocalPoint_v1.1.qvw from the document list on the left.
3. Select PerspectiveFocalPoint_v1.2.qvw. Under the Documents > QVS@qaw2008r2s2a > FocalPoint > Data – PerspectiveFocalPoint_v1.2.



4. Select the Reload sub-tab on the right side of the screen.

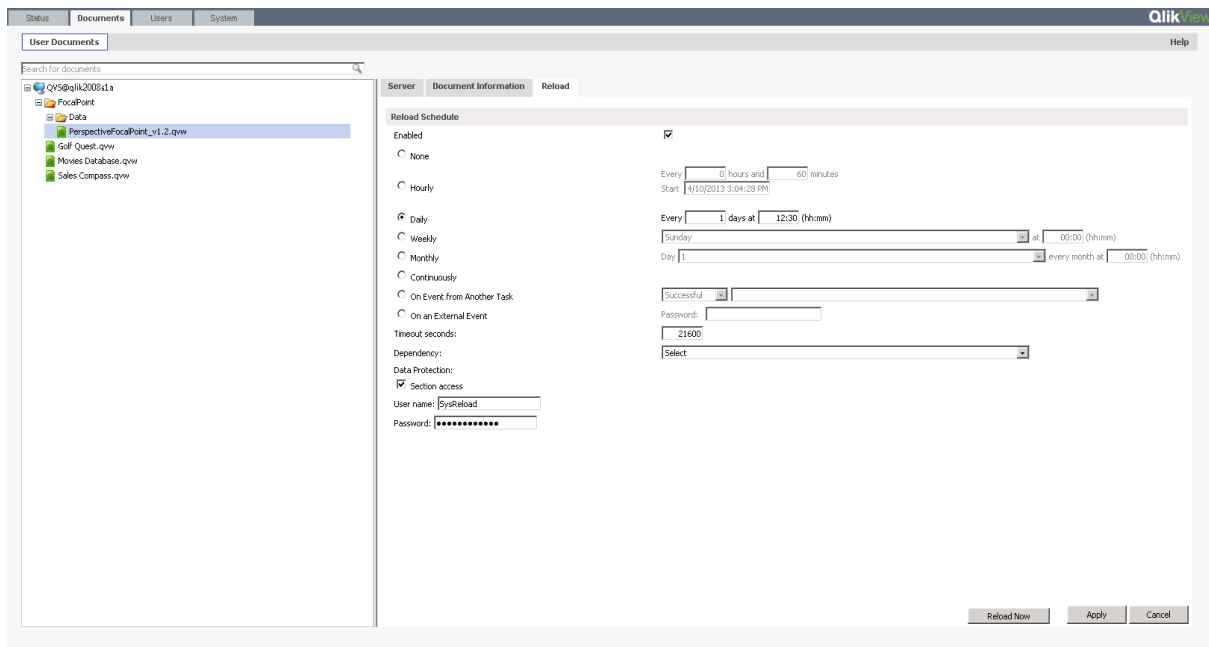


5. In the Reload schedule section, specify how frequently you want QlikView Server to reload Focal Point with up-to-date Perspective data.



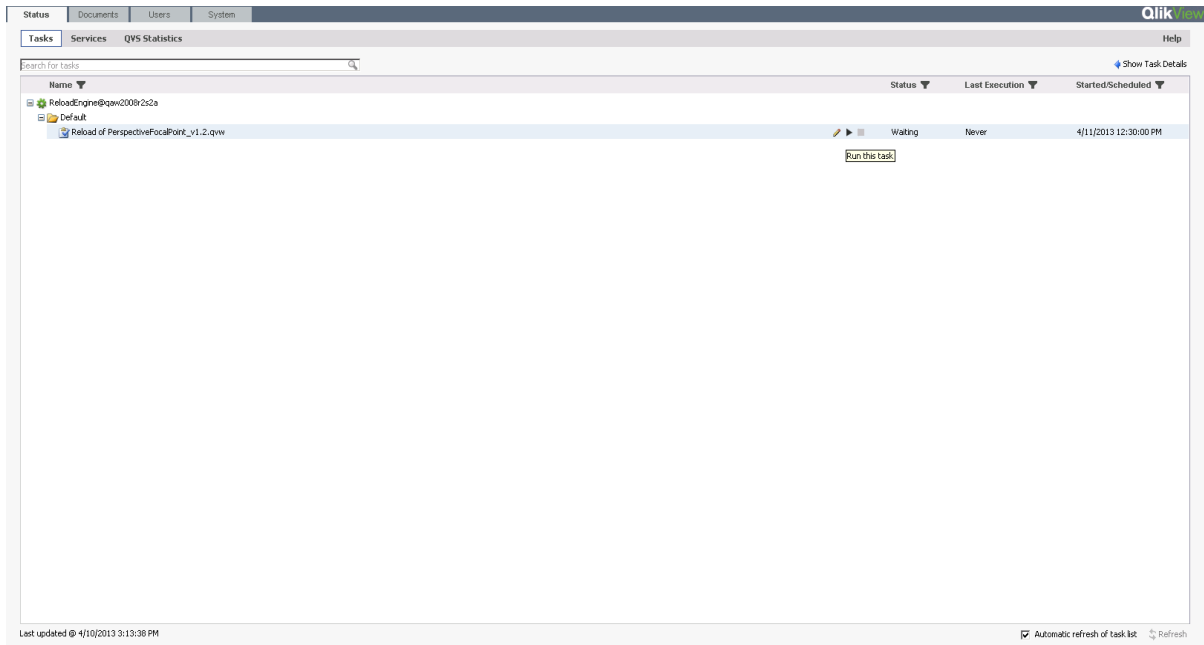
6. Check the 'Section access' box, and enter a Username of 'SysReload' and a Password of 'ReloadAccess' (without quotation marks).

Note: ANY CHANGES to QlikView Server will require the user to re-enter their password, and then click Apply.

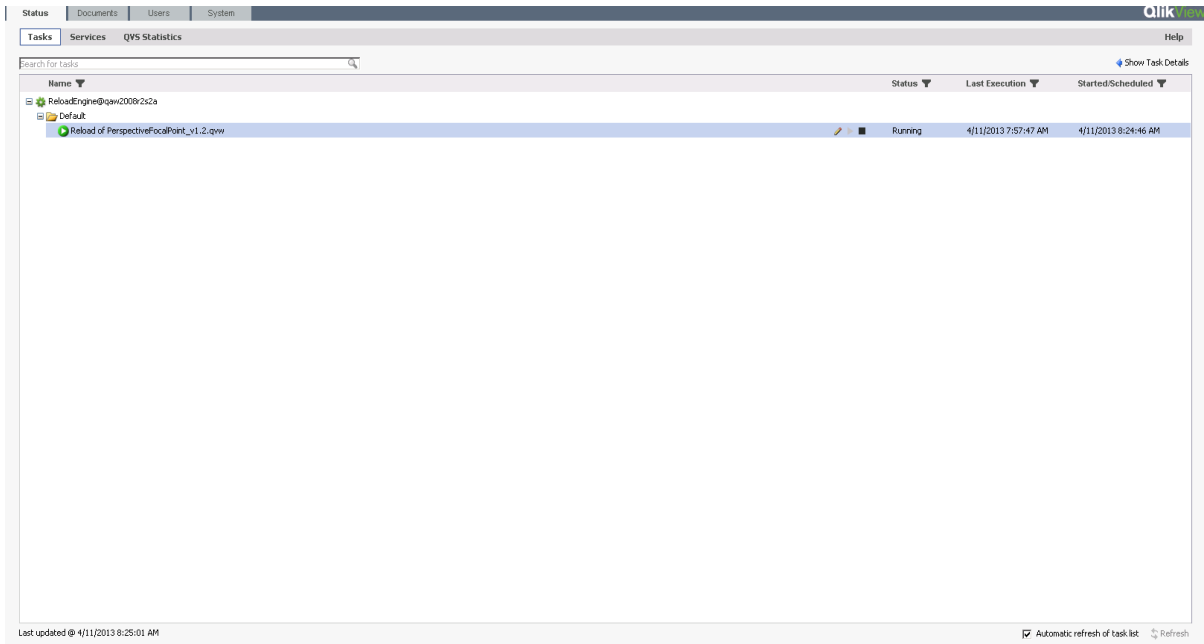


7. Select the Status tab, and ensure PerspectiveFocalPoint_v1.2.qvw is selected; then, click the black arrow to perform the initial load of data into Focal Point.

Note: You may also perform this step to manually reload data into Focal Point, if needed, outside of the scheduled time.



- 8. To view Task Details, check 'Automatic refresh of task list' at bottom right and then click 'Show Task Details' on the top right.

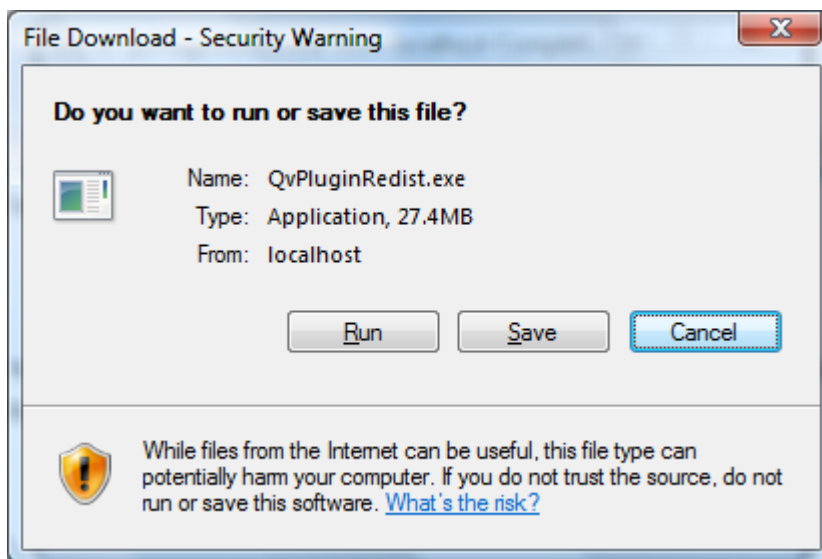


QlikView Analyzer Plug-in Setup

To interact with Perspective Focal Point, users require the QlikView Analyzer plug-in for their Internet Explorer browser. The following steps walk through the installation of this plug-in. However, if you are using a deployment method not covered in this guide, you may require the plug-in's .msi file, which is located in the installation folders in the client plug-in directory.

Installation

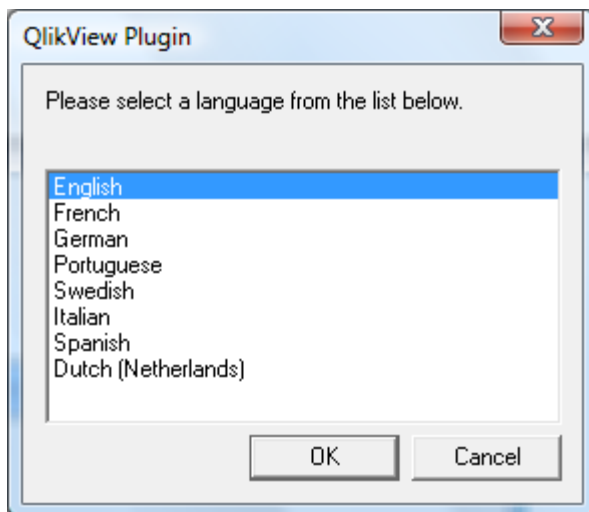
1. Launch the Focal Point login page by browsing to *https://<servername>/PerspectiveFocalPoint*; then, click the download link for the QlikView Analyzer plug-in on the left side of the screen.
2. To download and start installation of the plug-in, click Run.



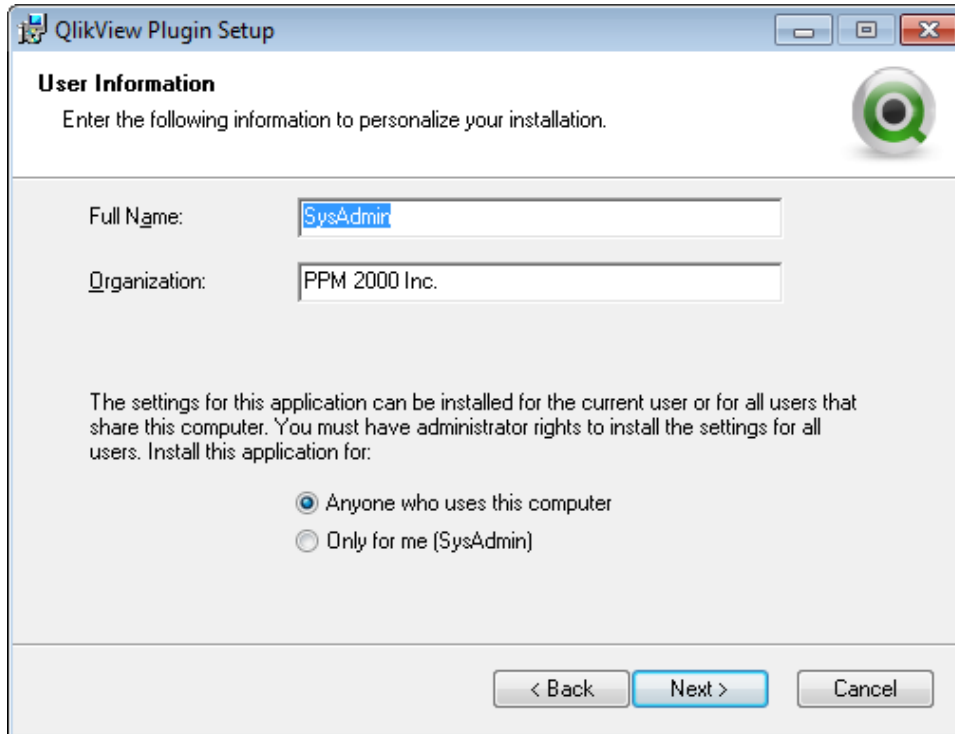
3. Click Run again. (Some operating systems may prompt Yes or No, rather than Run or Don't Run. In this case, click Yes.)



4. Select a language, and click OK.



5. Click Next.
6. Select your country or region, and click Next.
7. Select the 'I accept the license agreement' option, and click Next.
8. Enter your User Information, and click Next.



The screenshot shows a Windows-style dialog box titled "QlikView Plugin Setup". The main heading is "User Information" with a sub-instruction: "Enter the following information to personalize your installation." There is a QlikView logo in the top right corner. Below the instruction are two text input fields: "Full Name:" containing "SysAdmin" and "Organization:" containing "PPM 2000 Inc.". A paragraph of text explains that settings can be installed for the current user or for all users, and that administrator rights are required for the latter. Two radio buttons are present: "Anyone who uses this computer" (which is selected) and "Only for me (SysAdmin)". At the bottom, there are three buttons: "< Back", "Next >" (highlighted in blue), and "Cancel".

9. Click Browse to change the default install location, or click Next to continue.
10. Click Next to begin the installation.
11. Wait for the installation to complete, and click Finish.

Contact Information

Technical Support

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Website: <https://support.resolver.com>

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