

Configuring Intellicus on Microsoft Azure

Version: 18.1

intellicus

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Dated: March 2019

Acknowledgements

Intellicus acknowledges using of third-party libraries to extend support to the functionalities that they provide.

For details, visit: <http://www.intellicus.com/acknowledgements.htm>

Contents

1 Introduction	4
What does Intellicus 18 Offer?	4
2 Configuring Intellicus on Microsoft Azure	6
Choosing and instantiating Intellicus from cloud-based machine	6
3 Running Intellicus Instance on Azure	13
Launching Intellicus Portal	13
Intellicus URL Password	13
4 Delving into Intellicus features	17
Explore what you can do on portal	17
Connecting to User Data/Database	18
On Premise/Cloud Database	19
Analytics on User Data (CSV or Excel)	19
Exploring Intellicus Features	22
Mobile Analytics	24
5 Backup and Restore User Data	35
Backup Using Intellicus' iPackager tool	35
Upgrading Database Repository	35
Backup using Azure Recovery Services vault	35

1 Introduction

There is a global need for an intuitive web-based interactive interface to visualize and analyze large amounts of data. Intellicus helps organizations make better informed decisions with the help of our easy-to-use, self-serve reports and dashboards.

Intellicus' highly informative reports enable user interactivity and provide thrilling end user experience. Our intuitive, drag-and-drop UI enables you to customize reports according to your business needs and derive meaningful insights.

What does Intellicus 18 Offer?

Intellicus BI (Report) Server is a highly scalable server that is capable of handling simultaneous reporting requests 24x7 without performance issues and delivering rich formatted reports in any of the offered formats. BI server has built-in reporting engine, OLAP engine, scheduling and delivery engine and data extraction and transformation engines. A very simple SOA (Service Oriented Architecture) that provides a high value to the complete organization's multifaceted BI needs.

Intellicus Web Portal provides web-based secure access to all Intellicus functionalities from end user reporting to data administration and monitoring. Navigation panel and Objects Explorer provide users quicker access to functionalities.

Dashboards collate multiple key performance indicators, drillable to detailed, richly designed graphical reports. Each end user gets a personalized and customizable view of dashboard, according to the business needs.

Intellicus Studio helps to design richly formatted graphical reports with pixel perfect alignment of data represented as charts, tables and matrices. Features like drill down, conditional formatting and alerting will improve your report viewing experience.

Ad hoc Reporting empowers your business end users to tweak their ad hoc reports according to emergent needs allowing decision makers to access required business facts in an agile fashion.

Smart View is a self-service tool to design smart reports with drag and drop actions for performing on-the-fly operations. It allows you to choose visualizations according to relationships between different data elements, and helps you uncover new patterns and insights. These include GIS maps, tree maps, heat maps, packed bubbles, funnel, counter, gauge, donut, scatter plot and other advanced visualizations.

OLAP engine provides a multidimensional data storage and pre-aggregation solution. Huge volumes of transactional data can be summarized on multiple dimensions at multiple levels.

High Speed View allows to build multi-dimensional cubes of data from multiple data sources. You can slice and dice the dimensions, drill through multiple levels and analyze your data for deeper business insights. With one click, Intellicus lets you burst open your cube in all possible dimensions, and lets you slice and dice all views at the same time.

Heterogeneous Data Sourcing of Intellicus lets you connect to multiple databases of your organization to correlate their data and prepare common cubes and reports from them.

Scheduler allows users to create recurring jobs to generate reports and deliver by email, print or publishing on FTP locations.

Mobile Analytics Server and iOS /Android application, combined, provide the Reporting and Dashboard functionalities on popular mobile devices to decision makers for on-the-move access of required information in the required format.

Data Science enabled Intellicus BI helps you to bring out predictions based on their historical data. This empowers you to take well-informed decisions for your business. With what-if analysis in Intellicus, you can also analyze the predictions based on different conditions. Intellicus lets you connect to different data science engines to process your data. It returns the predicted data on which you can perform further transformation steps and visualize it on the Intellicus UI. Intellicus gives you numerous intuitive charts to understand and analyze your current and predicted data.

2 Configuring Intellicus on Microsoft Azure

This chapter provides information and steps to get you started with Intellicus on your cloud machine (Microsoft Azure) in the quickest way.

Choosing and instantiating Intellicus from cloud-based machine

Intellicus can be bought on hourly basis from the Azure marketplace and is not covered by any Azure credits you might have.

Login to the marketplace (<https://azuremarketplace.microsoft.com/en-us>) and search Intellicus.

Once you select Intellicus, you need to click 'Get It Now' to instantiate the Intellicus VM image.

Products > Intellicus BI Server V18.1 (5 Users)

Intellicus BI Server V18.1 (5 Users)

Intellicus Technologies

Overview [Plans + Pricing](#) [Reviews](#)

GET IT NOW

Pricing information
Starting at \$0.33/hour
+ Azure infrastructure costs

Categories
[Analytics](#)
[Management Tools](#)

Support
[Support](#)

Legal
[License Agreement](#)
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Self-Service Business Intelligence server with built-in data science, ETL, semantic layer and more.

Intellicus BI Server on MS Azure is an end to end self-service BI platform that offers advanced reporting and analytics capabilities. It offers a semantic layer and integrated ETL capabilities.

With Intellicus BI Server, you can connect multiple, diverse data sources to bring all your data onto one platform, design interactive, visually-rich reports and dashboards and perform a 360° analysis on your business data.

Intellicus offers built-in data science capabilities
Intellicus BI Server comes with built-in OLAP engine, scheduled delivery, alert and notification services with certified enterprise security and readiness
Intellicus offers ad-hoc, pixel perfect and high-speed reporting to suit all your business reporting and analytics needs
Intellicus offers APIs to embed the platform in third party apps

With Intellicus Enterprise Reporting, you can:

- Seamlessly connect data science environments and leverage a single platform to run machine learning algorithms, train models and get predictive insights in easy steps
- Visualize your business data, monitor overall performance, and make informed decisions. You can drill into critical business KPIs to identify & highlight areas for improvement, derived from multiple data sources
- Perform sub-second, multi-dimensional analytics to explore all your data on a single screen. You can slice & dice the attributes, drill through or drill down multiple levels & analyze your data for deeper business insights
- Connect real-time messaging queues like RMQ, Kafka, and more and get insights from your data in real-time
- Create highly formatted pixel-perfect operational reports. Print and share impeccable invoices, form etc. as per compliance
- Schedule, export, publish and share reports in different formats, with various stakeholders
- Assign users and role-based access control as well encrypt and restrict data wherever needed
- Get instant alert and notifications on mobile and email whenever an anomaly is

Figure 1: Intellicus on Azure Marketplace

Click 'Continue' to agree to the terms of use as shown in Figure 2.

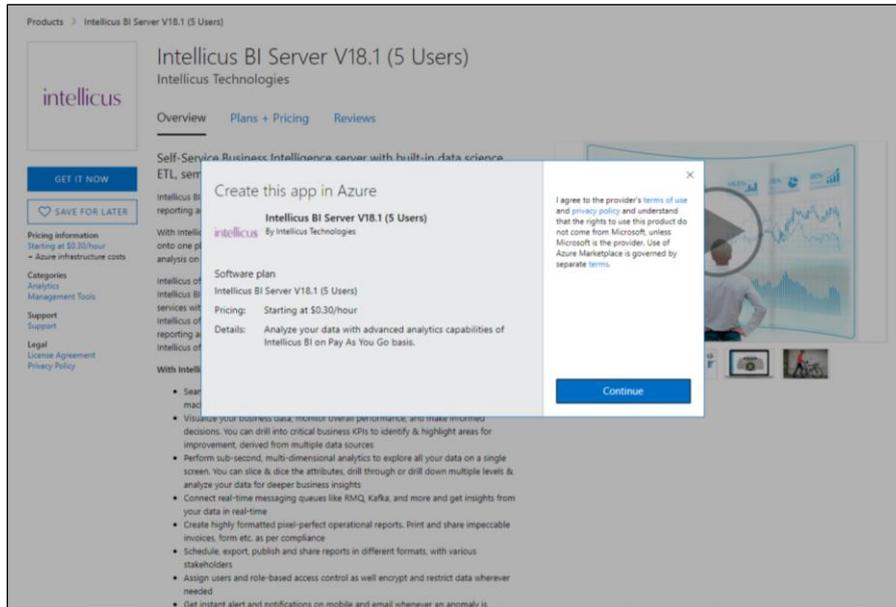


Figure 2: Create Intellicus application in Azure

Next, click 'Create' on Figure 3 after reading the application summary.

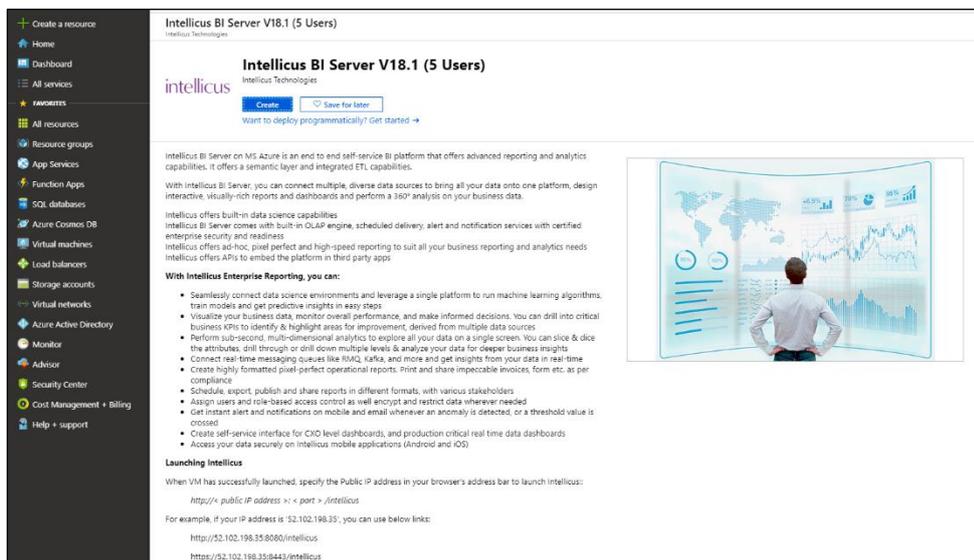


Figure 3: Select deployment model to create Intellicus application in Azure

You now need to configure the virtual machine to specify its name, disk type, user name/password, resource group etc. Click 'Next'.

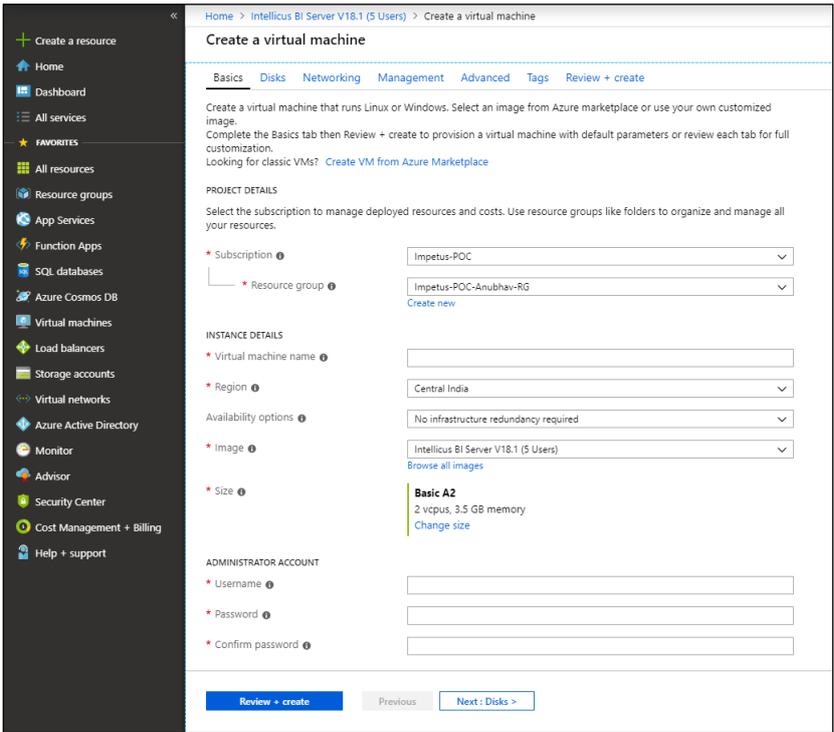


Figure 4: Configure basic settings of virtual machine

Next, choose size of the virtual machine as shown in Figure 5. Click 'Next'.

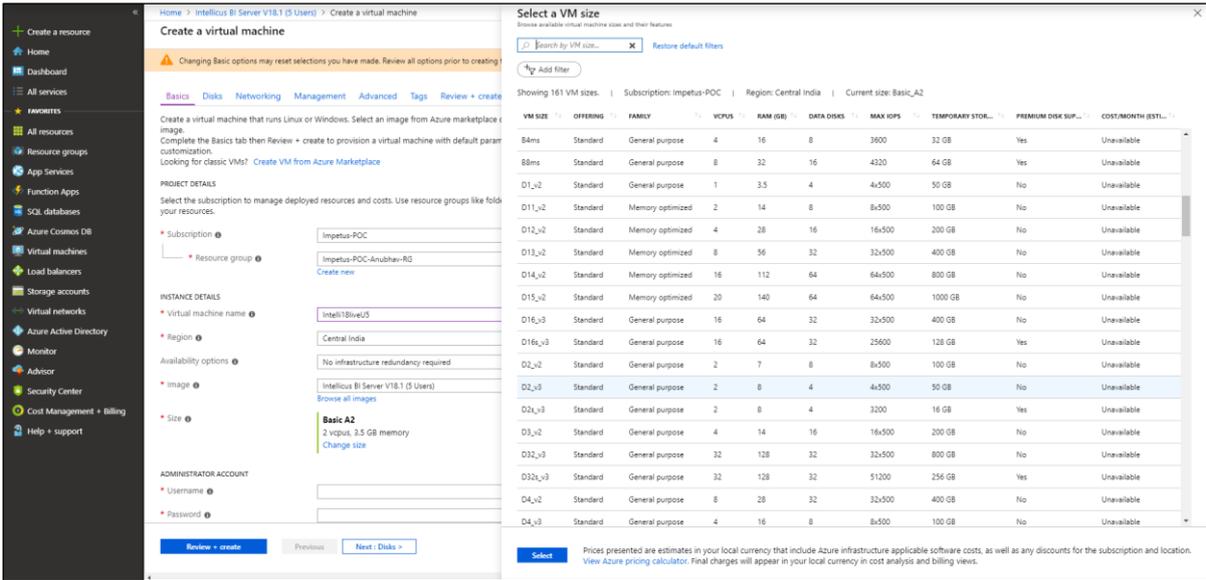


Figure 5: Choose virtual machine size

You can optionally choose to configure high availability, storage etc. as shown in Figure 6 and click ‘Next’.

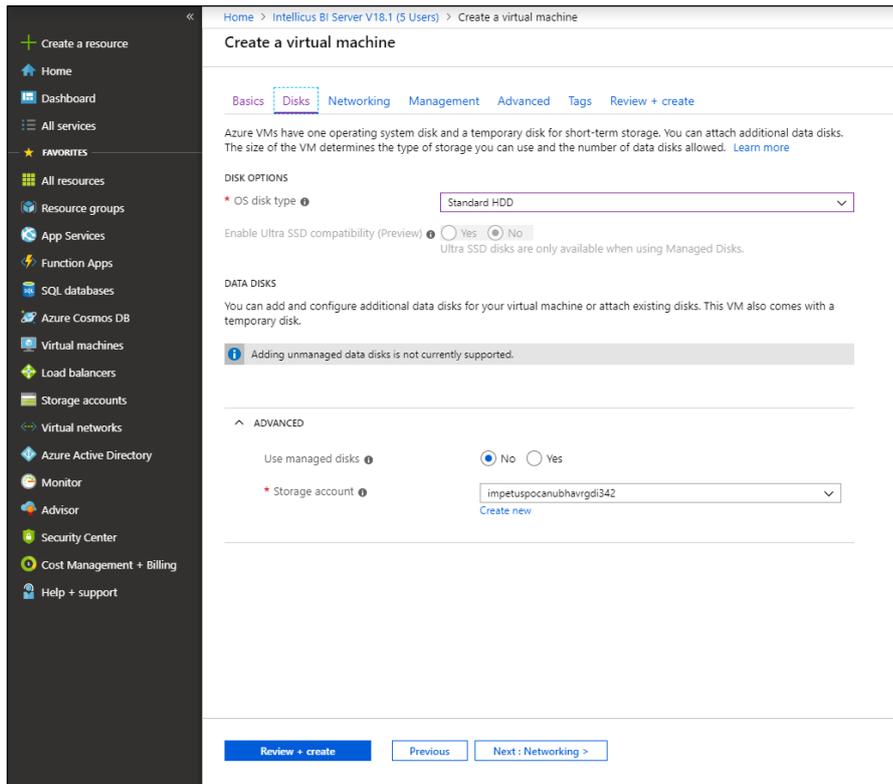


Figure 6: Choose disk type and storage account for your virtual machine

Now you can define network configurations for your virtual machine as shown in Figure 7. Click ‘Next’.

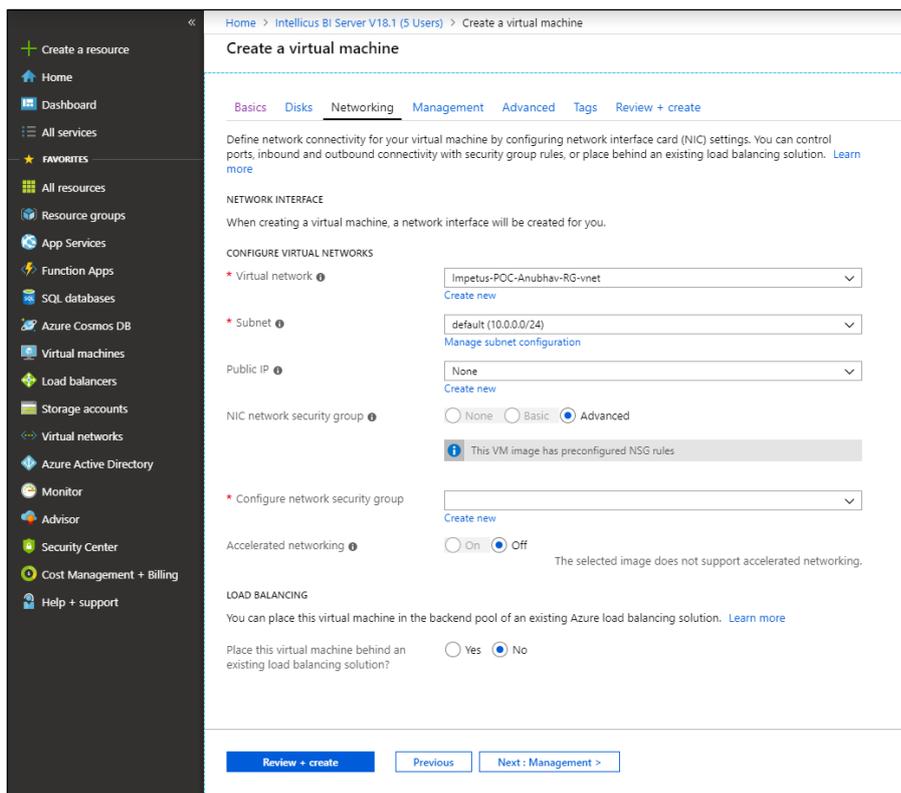


Figure 7: Configure the networking interface for your virtual machine

You need to configure monitoring and management options for your virtual machine. Click 'Next'.

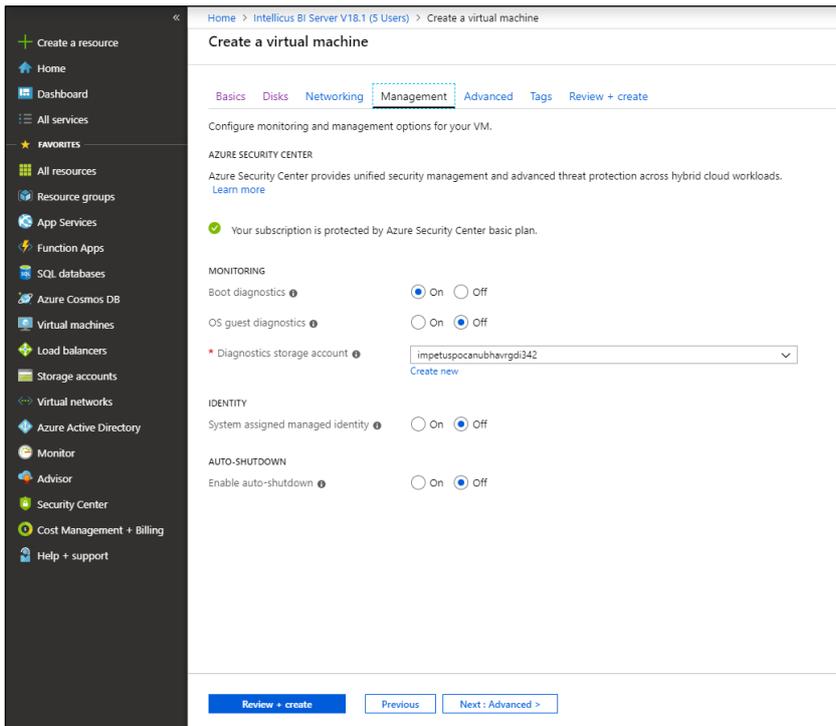


Figure 8: Configure monitoring and management options for your VM

Optionally, you can create tags to categorize multiple resources/resource groups. Click 'Next'.

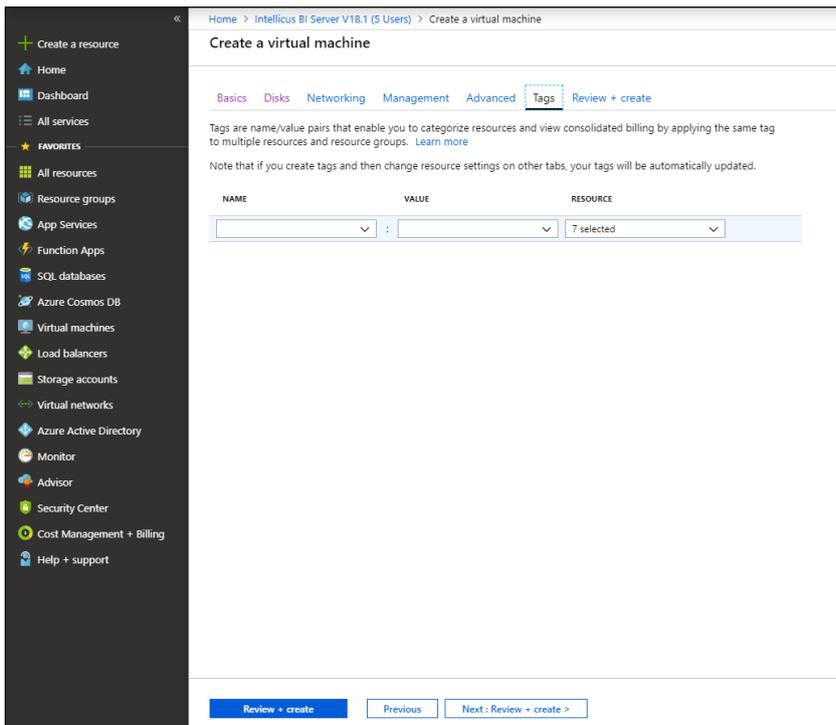


Figure 9: Provide tags for your virtual machine

Once you are done specifying the virtual machine settings, you can preview the summary. Click 'Create' to start Intellicus deployment.

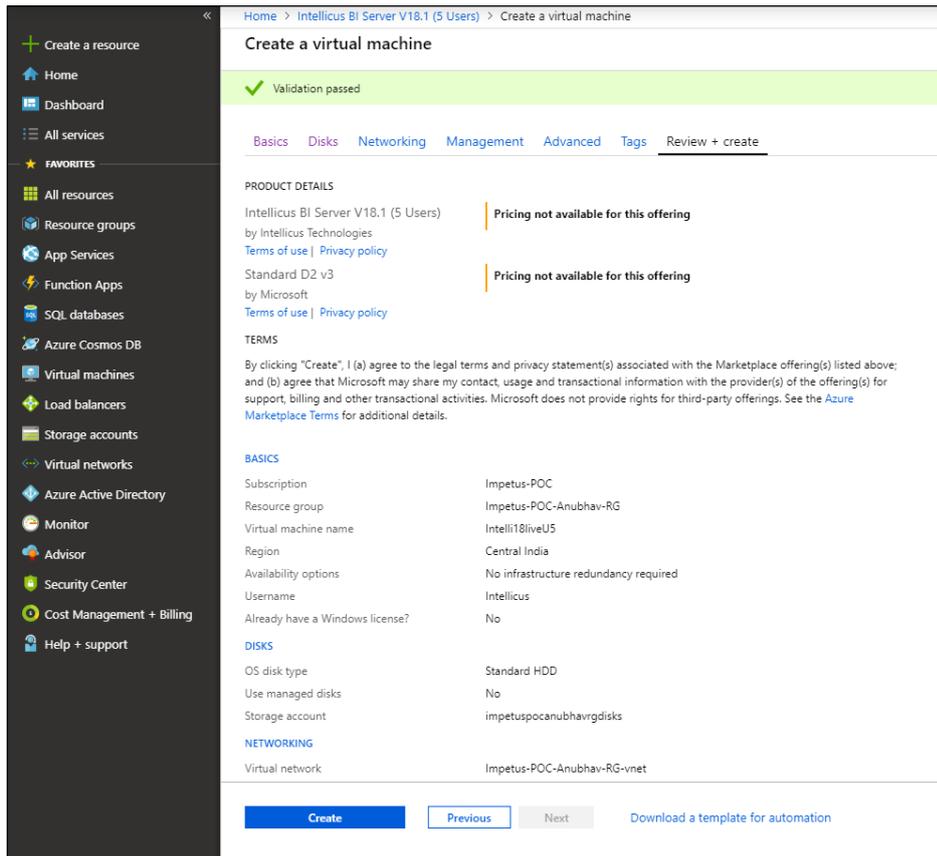


Figure 10: Summary preview of virtual machine

The deployment progress screen appears as below:

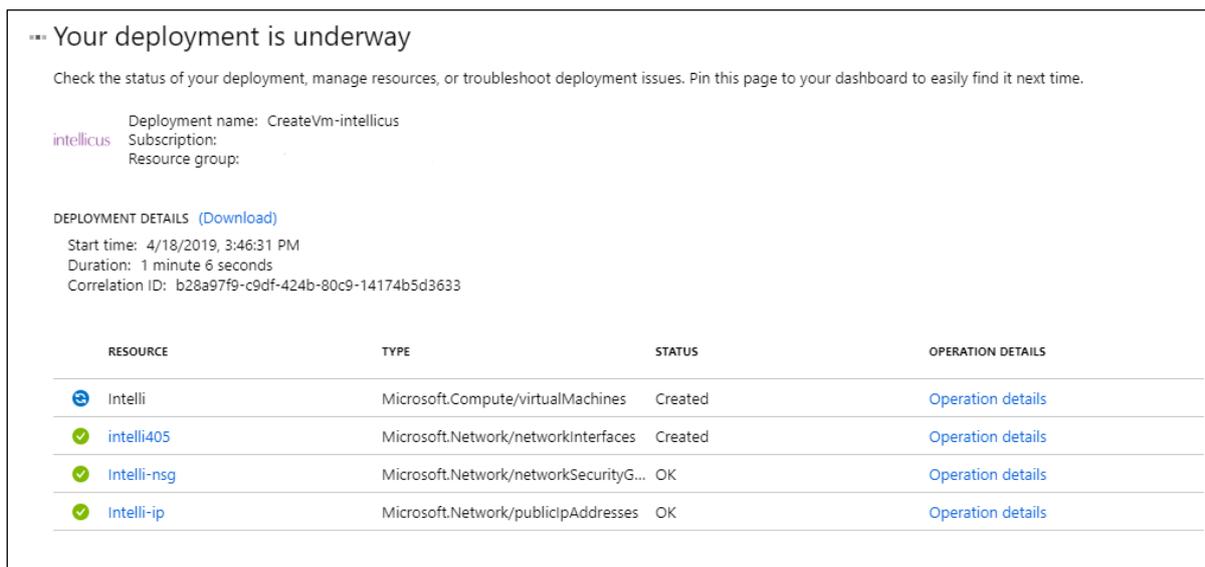


Figure 11: VM Deployment Status Screen

Once the deployment is successful, you can see the Public IP address that would be required to launch the Intellicus application.

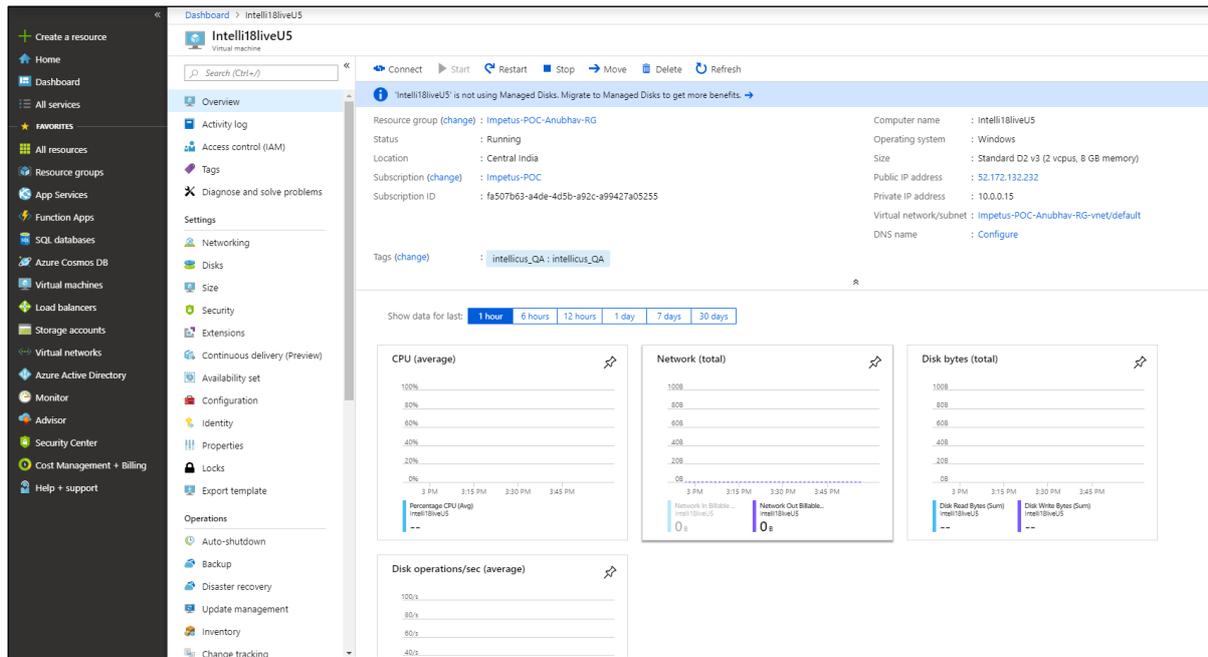


Figure 12: Successful Deployment of Intellicus

If you have chosen Windows based machine for deployment, Intellicus will be launched automatically as soon as the deployment completes.

3 Running Intellicus Instance on Azure

After you have initiated the VM, Intellicus service gets automatically started. You can directly access Intellicus application through your own machine (on premise or on cloud).

Launching Intellicus Portal

Running Intellicus from User Machine

Intellicus provides browser-based user interface. When VM has successfully launched, specify the Public IP address in your browser's address bar to launch Intellicus through user's machine:

`http://<Public IP address>:<Port>/intellicus`

For example, if your IP address is '52.102.198.35', you can use below links:

`http://52.102.198.35:8080/intellicus`

`https://52.102.198.35:8443/intellicus`

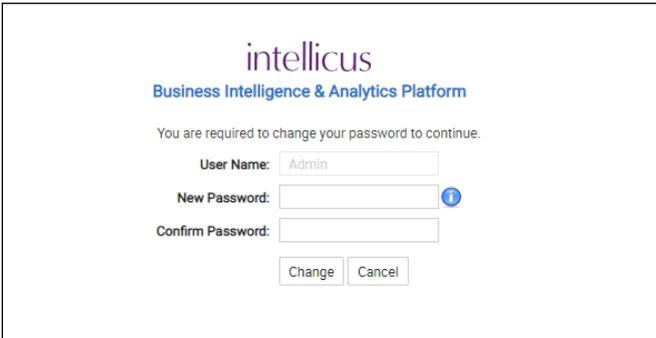
At present, self-signed certificate (https certificate) is available on Intellicus application. But you can deploy your own purchased certificate, if required.

Running Intellicus from VM Machine

Apart from this, you can also browse Intellicus application by clicking the portal shortcut available under C:\Program Files\Intellicus of running VM machine.

Intellicus URL Password

The below screen will be displayed on clicking the Intellicus URL.



The screenshot shows the Intellicus login interface. At the top, the Intellicus logo is displayed in purple, followed by the text 'Business Intelligence & Analytics Platform'. Below this, a message states: 'You are required to change your password to continue.' There are three input fields: 'User Name' with 'Admin' entered, 'New Password', and 'Confirm Password'. There are 'Change' and 'Cancel' buttons at the bottom.

Figure 13: Change 'Admin' Password Screen

You need to set the default password for 'Admin' user (mandatory step) in order to proceed further.

After changing the default password for 'Admin', below login screen will be displayed:



Figure 14: Intellicus login page

Now, login onto Intellicus application using 'Admin' user and with the password you have set (as per Figure 9).

The default Organization will be set as 'Intellica' for 'Admin' User.

NOTE: Click "More Option" if you wish to select any organization other than the default. But for first time user, an 'Intellica' can be chosen as default organization.

To explore and evaluate all the features of Intellicus, login using 'Admin' user and 'Intellica' Organization. The above screen enables you to login to the application.

In case Intellicus URL begins with "https://", port 8443 is used by default; while URL beginning with "http://" uses port 8080 by default.

Changing the default port number

Below is the information on how to change the port number when Jakarta Web Server is used.

The port number information is stored in server.xml file.

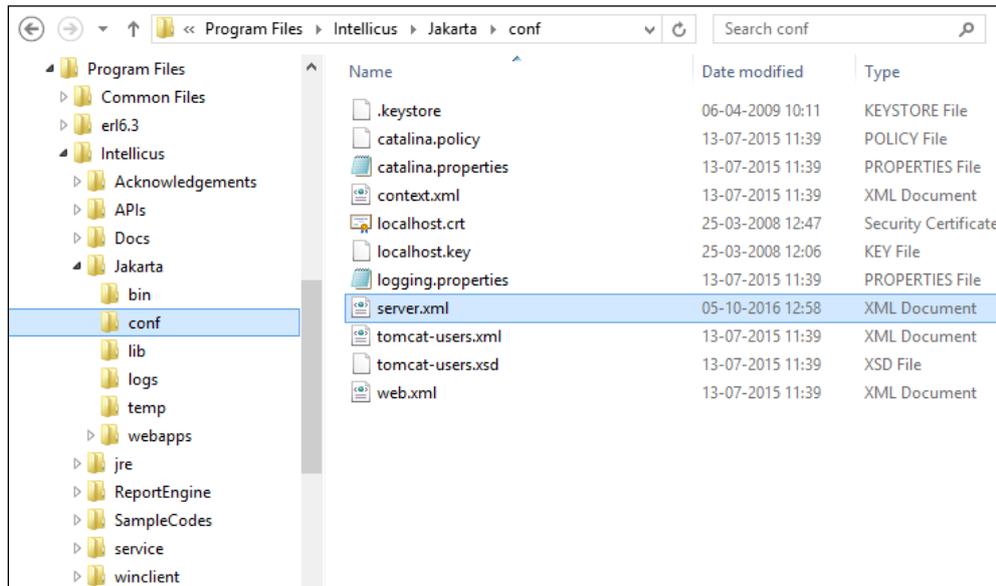


Figure 15: Location of server.xml

To change the port number:

- Open server.xml in a text editor.
- Change the value of **Connector port** to a number that is free.
- Save the changes.

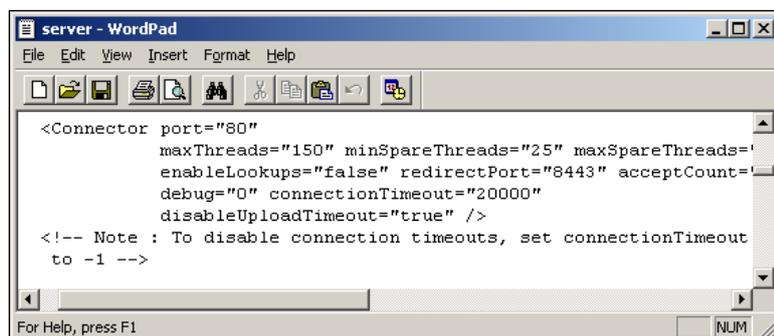


Figure 16: Changing the port number

After successful login, the following Home Page appears:

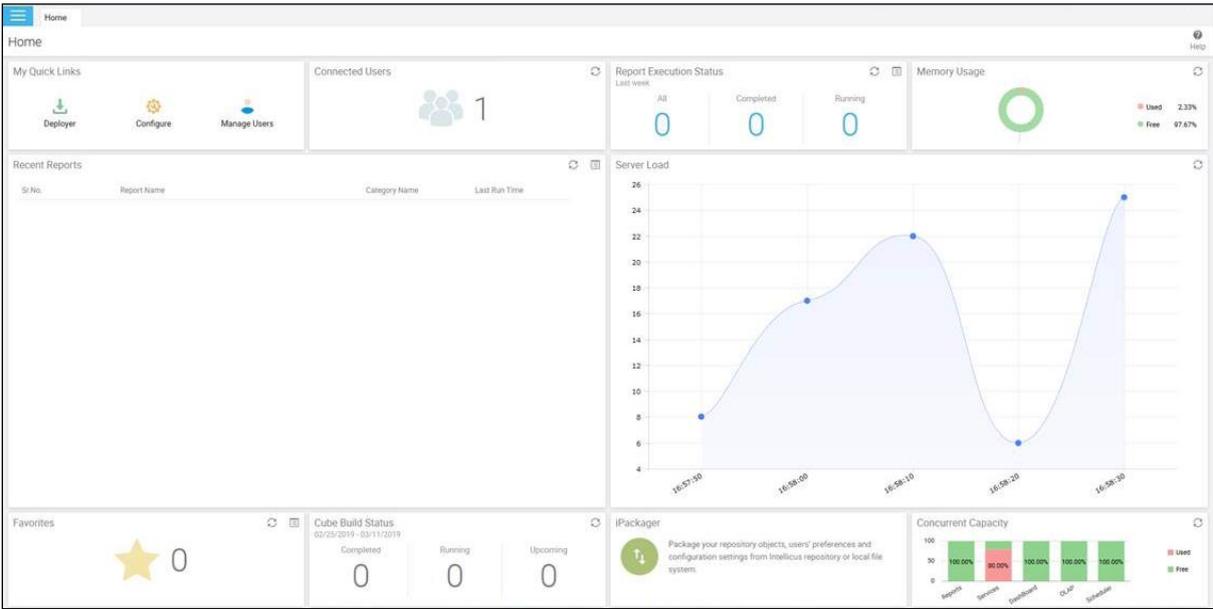


Figure 17: Homepage for the Admin user

4 Delving into Intellicus features

Intellicus on cloud installation includes a limited demo data which you can use to get a feel of Intellicus features. But you can use your own data and perform analytics on it.

Explore what you can do on portal

Listed below are some of the portal pages you may wish to explore.

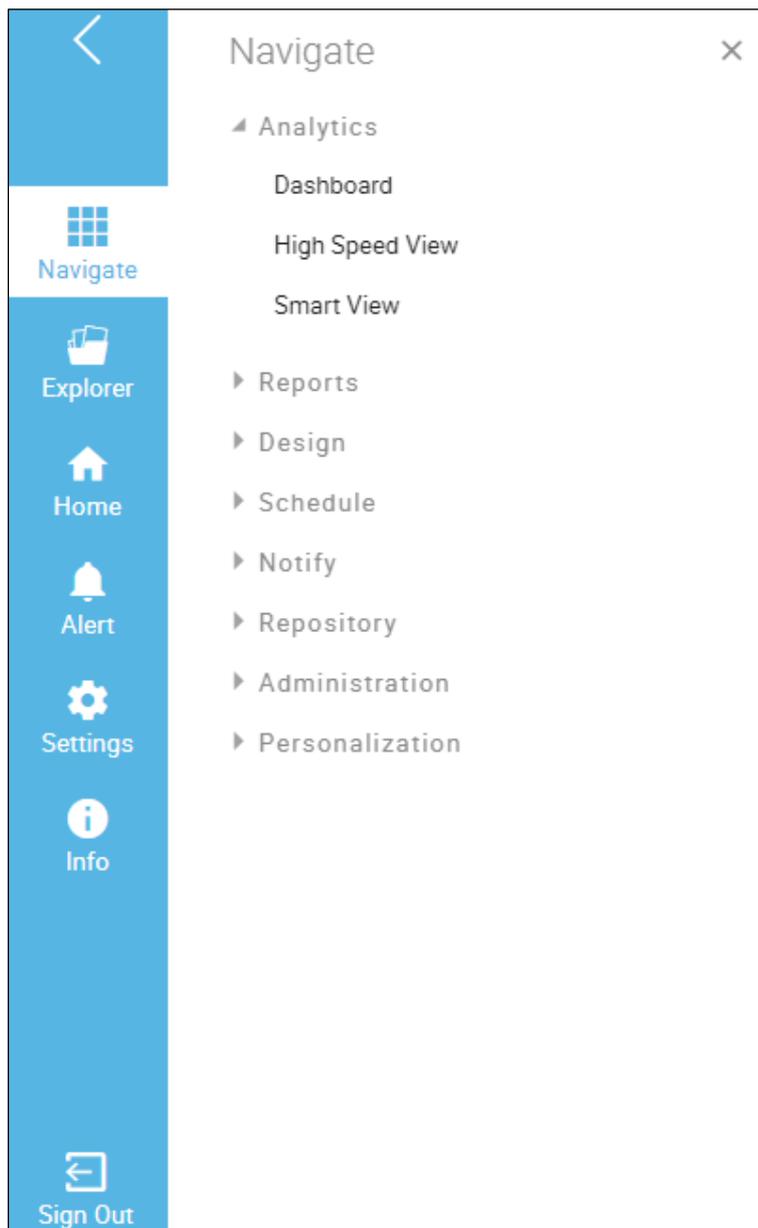


Figure 18: Intellicus Menu

Connecting to User Data/Database

Database Connections: Navigate > Administration > Configure > Databases

Intellicus supports most of the widely used databases as listed below:

- Oracle
- MS SQL Server
- MySQL
- PostgreSQL
- Sybase
- Cache DB
- ODBC (for Excel Data Source)
- DB2
- Hadoop
- HIVE
- HBASE
- IMPALA
- HP Vertica
- H2
- Greenplum
- Aster Data
- Teradata
- Amazon EC2
- Cassandra
- MongoDB
- SQLite
- Elastic Search
- Files/Stream (S3, FTP, Kafka, SAX, Google Sheet)
- Web Service (REST & SOAP)
- Social Media (Twitter)
- Amazon Redshift

Intellicus uses set of third-party libraries to extend support to the functionalities that these provide. Therefore, you need to provide these library files manually using 'Add' button under Database Connection page. To know more, refer [*WorkingwithDatabaseConnections.pdf*](#)

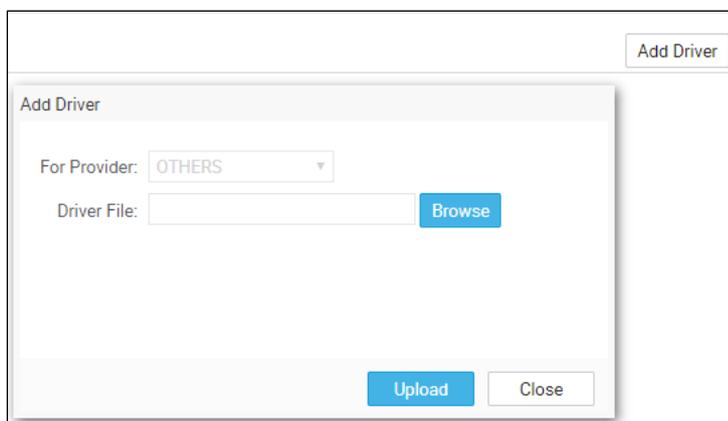


Figure 19: Add Driver

The details of library files are available under [acknowledgements.html](#).

On Premise/Cloud Database

Intellicus is empowered to connect with the databases if running on cloud or on premises.

There should be network connectivity between your database and Intellicus to perform reporting and analytics, if your database resides on premise.

Similarly, on cloud database, relevant database ports should be made available so that proper connection can be established.

Analytics on User Data (CSV or Excel)

CSV as data source

You can also perform analytics on your own CSV data by uploading the file (zipped/unzipped) to Intellicus. - This can be achieved using the Query Object Designer on Intellicus portal as shown in Figure 16.

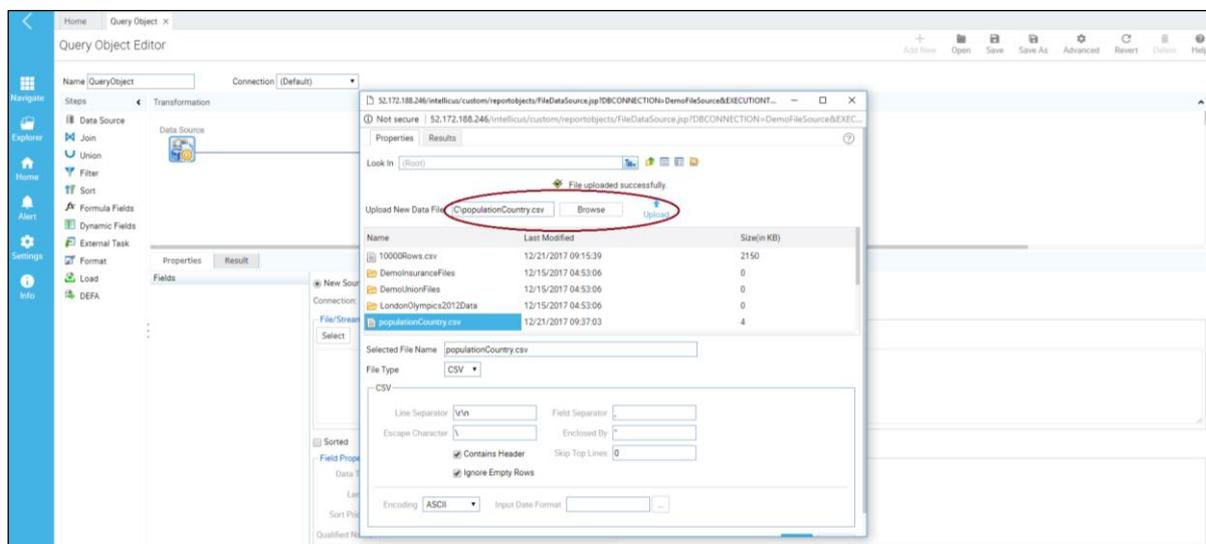


Figure 20: Upload CSV File in Intellicus

Excel as data source

Apart from CSV, you can also perform analytics if user data resides in Excel sheet format. Please refer below steps for creating an ODBC connection:

1. Go to Control Panel -> Administrative Tools.

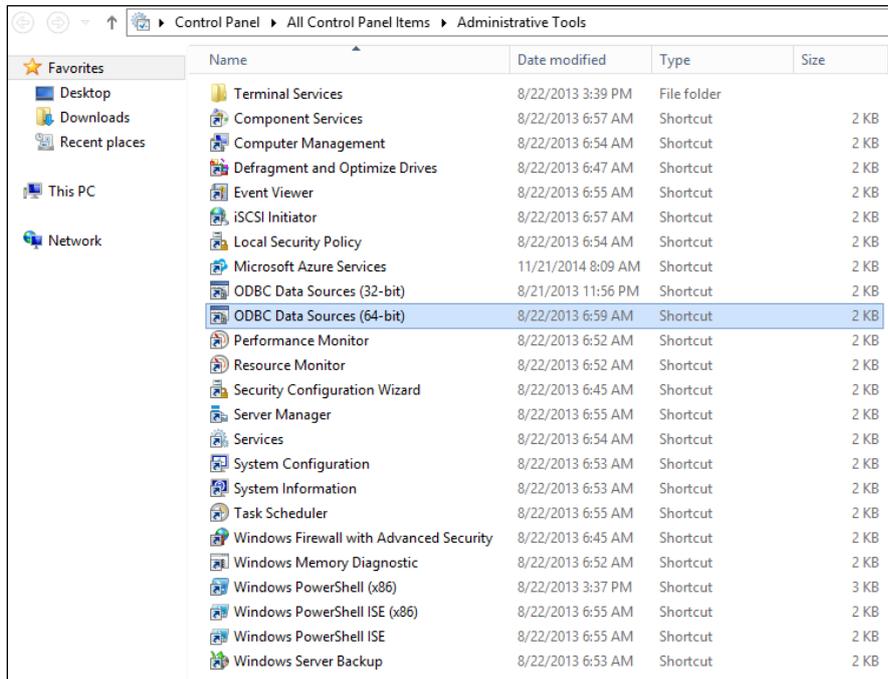


Figure 21: Administrative Tools

2. Open ODBC Data Sources (64-bit) and go to System DSN -> Click Add-> Select a driver for which you want to set up a Data Source. Provide DSN Name and select the workbook. Click OK.

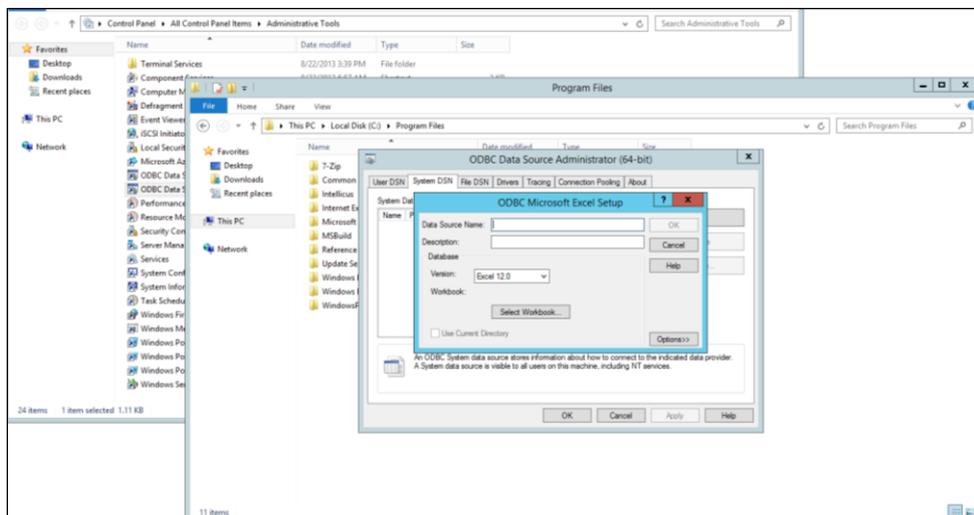


Figure 22: ODBC setup

3. Login to Intellicus and go to Navigate -> Administration -> Configure. Click the Add button on Databases tab and provide all required details for ODBC Connection and save the connection.

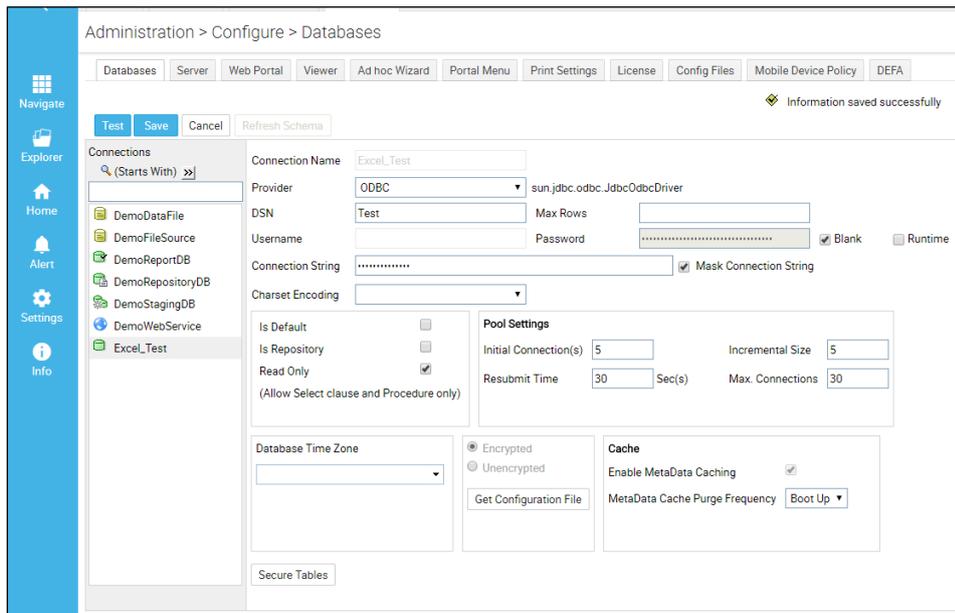


Figure 23: Configure Database

4. Go to Navigate -> Design -> Query Object to select Data Source and ODBC connection. Click SQL Design.

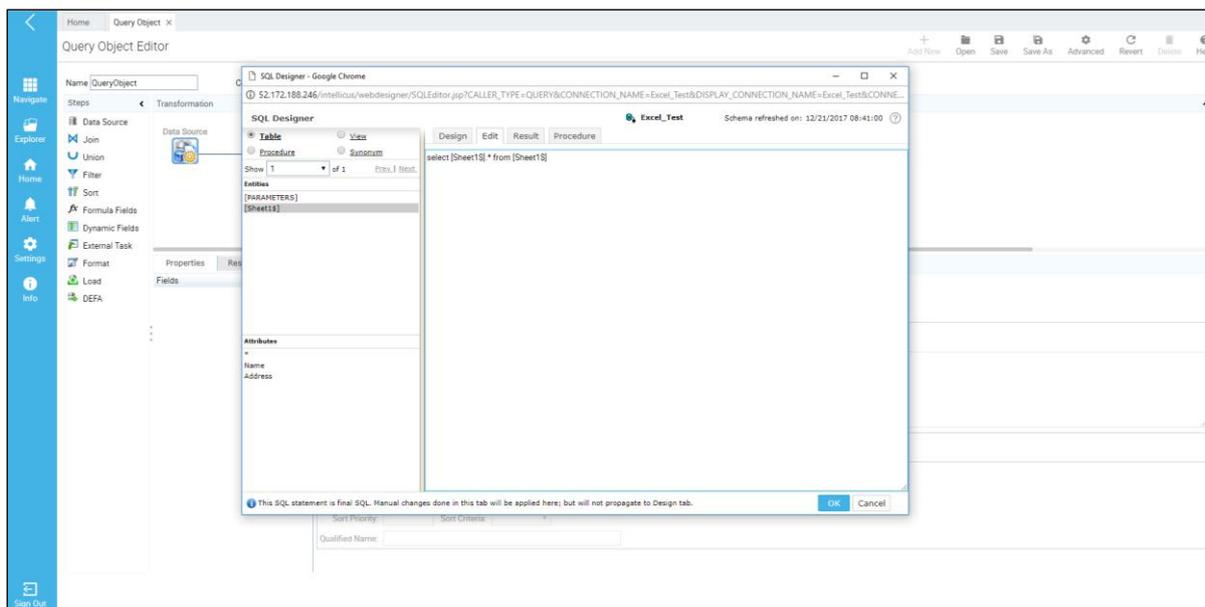


Figure 24: Select ODBC connection

5. Go to Edit tab and write SQL query having Sheet name as table name followed by a “\$” symbol as follows (like Select * from [Sheet1\$]):
6. Click OK and save the Query Object.
7. Use the Query Object for creating different reports.

Exploring Intellicus Features

Query Objects / Data Sources: Navigate > Design > Query Object

Query Objects form the business meta-layer for end user reporting. Query Objects hide the physical database details, SQL complexities, table names etc. from the end user.

A query object contains details to fetch desired data from a data connection. A query object acts as a data source to reports, parameter and analytical objects.

(For details, refer [WorkingwithQueryObjects.pdf](#))

Smart Report: Navigate > Analytics > Smart View

A self-service tool to design reports with drag and drop actions for performing on-the-fly operations.

Get contemporary style of web controls like dynamic data grids and various charting options for data depiction.

(For details, refer [ConfiguringAdhocReporting.pdf](#), [WorkingwithSmartView.pdf](#))

High Speed Report (OLAP Reports): Navigate > Analytics > High Speed View

Intellicus’ evolved multi-dimensional analytics to let you explore your data from all dimensions in a single screen to get a panoramic view of your business at the speed of your thought.

(For details, refer [WorkingwithHighSpeedView.pdf](#))

Ad hoc Reports –customization and report design: Navigate > Administration > Configure > Ad hoc Wizard, Navigate > Design > Ad hoc Template, Navigate > Design > Ad hoc Report, Navigate > Analytics > Smart View

Ad hoc reporting feature brings report design functionalities from designers to the users. Users can not only view report output, but also study and analyze the output by carrying out several analysis activities like sorting, grouping and filtering the output without returning to the designer screen.

(For details, refer [ConfiguringAdhocReporting.pdf](#), [DesigningAdhocReports.pdf](#))

Running Reports: Explorer > expand category > right click the report > select the Run Report option

Intellicus provide facility to run a report in different formats. Apart from this you can also schedule (using Quick Schedule and Batch Scheduling option) and view results later.

(For details, refer [RunningReportsInIntellicus.pdf](#), [BatchScheduler.pdf](#))

Dashboards: Navigate > Design > Dashboard Widget, Navigate > Analytics > Dashboard

To visualize your business data at a glance, monitor overall performance and make informed business decisions.

(For details, refer [CreatingDashboardWidgets.pdf](#), [WorkingwithDashboards.pdf](#))

Batch Scheduler: Navigate > Schedule > Jobs

Scheduling of reports is very helpful for better utilization of server and printer resources.

(For details, refer [BatchScheduler.pdf](#))

Configurations: Navigate > Administration > Configure

You can configure properties related to Report Server and Client (portal) as well as configure email templates and customize configuration files.

(For details, refer [ConfiguringIntellicus.pdf](#))

Favorites: Explorer > expand category > right click the object > select the **Add to favorites** option

Standard Reports: Intellicus standard reporting enables you to create pixel-perfect, form style and printable format reports to support your organization's operational tasks. An enterprise-grade scheduler and dispatcher of Intellicus helps you distribute the soft copies to thousands of users without manual intervention.

You need to use Intellicus Studio to design and deploy standard reports. In Windows, click Windows Start > All apps > Intellicus > Studio to start the Studio application.

(For details, refer [DesktopStudio-ATour.pdf](#))

Data Science in Intellicus: Intellicus provides a seamless connection to different data science environments with access to all the available libraries to fulfill your Data Science requirements.

(For details, refer [DataSciencewithIntellicus.pdf](#))

Mobile Analytics

Intellicus Mobile BI takes your reports and analytics to tablets and phones, on both Android and iOS platforms. Our mobile analytics solution delivers instant access to your important business insights.

You can perform ad hoc and multidimensional analysis on the move with or without internet connectivity. Intellicus Mobile lets you update data when online, interact and analyze while offline.

To achieve business analytics on mobile devices, follow the below steps to install and start using Intellicus Mobile.

1. Go to Play Store (for android devices) or App Store (for iOS devices).
2. Search Intellicus and tap “Install”.
You will see the memory required to install Intellicus application.
3. After opening the application, you would be prompted to enter the server address where your Intellicus web application is running along with the Username/Password.
4. You can now see the Home screen of Intellicus Mobile as shown in Figure 25. This lists the entities as Smart View (for analyzing query objects), Reports (for viewing smart, standard, ad hoc and OLAP reports), High Speed View (For viewing and analyzing cube objects) and Dashboards (for viewing dashboards).

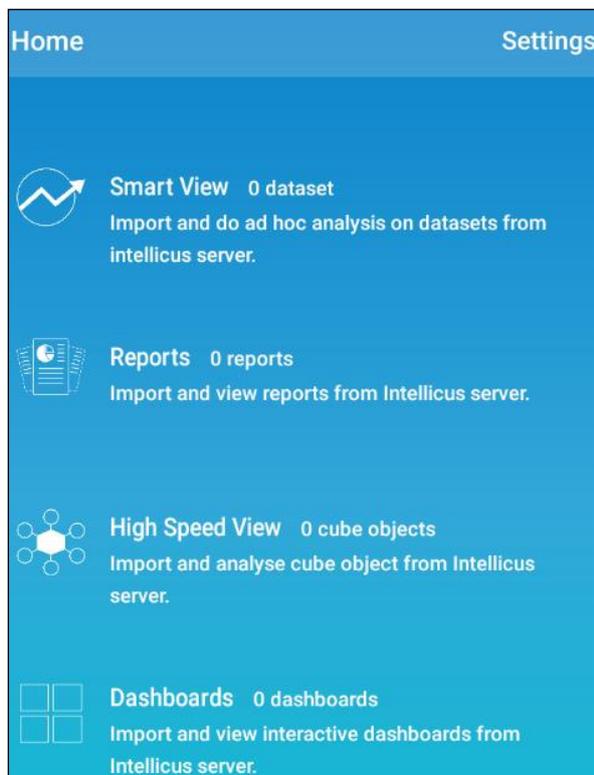


Figure 25: Home page of Intellicus Mobile

- Next, you have to import/subscribe datasets, reports, cube objects or dashboards already created in Intellicus web application.

Tapping Smart View would list the datasets you can choose to import as shown in Figure 26.

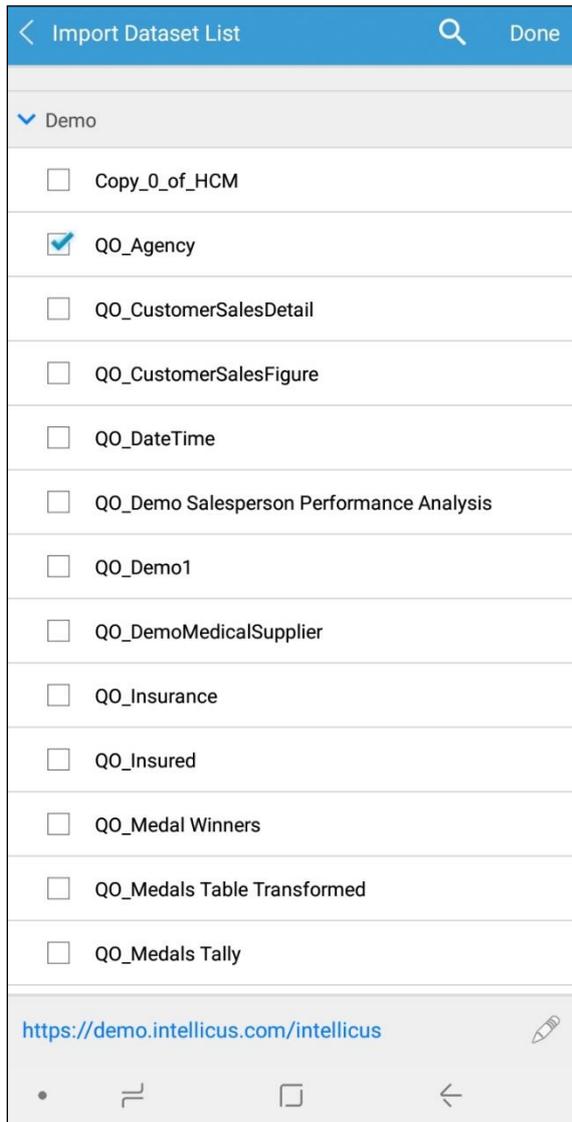


Figure 26: Import Dataset in Smart View

Select the datasets to import. This would import the selected datasets from Intellicus server to the mobile application.

6. You can choose to browse, analyze or update the dataset on tapping the selected dataset.

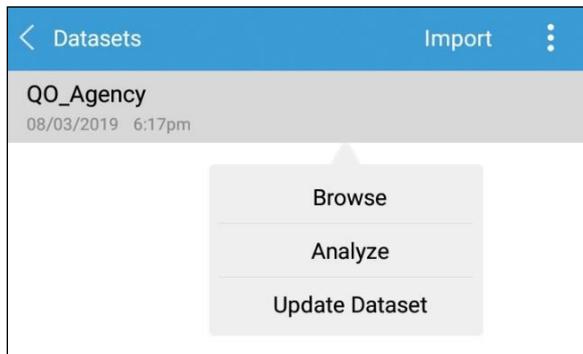


Figure 27: Actions on Dataset

Tap "Browse". The data in the grid appears as shown in Figure 28.

The screenshot shows a mobile application interface displaying a grid of data. The header is blue with a back arrow, the text 'QQ_Agency', and a three-dot menu icon. The grid has five columns: 'Age...', 'Agency Name', 'Agenc...', 'Industr...', and 'Insura...'. The data rows are as follows:

Age...	Agency Name	Agenc...	Industr...	Insura...
0	Others	Others	Others	Other
312	Chubb & Son	Public	Insura...	Comr
310	Cumberland Mutual Fi...	Subsid...	Insura...	Identi
313	Firemans Fund	Subsid...	Insura...	Persc
353	St. Paul Travelers Insu...	Public	Insura...	Risk i
363	Selective Insurance C...	Public	Proper...	Flood
359	Zurich American	Private	Financi...	Life a
314	Fitchburg Mutual	Public	Financi...	Fire a
311	Parkway Insurance	Subsid...	Insura...	Auto
361	Philadelphia Contribut...	Public	Insura...	Home

At the bottom of the screen, there is a navigation bar with a gear icon, a home icon, a square icon, and a back arrow.

Figure 28: Grid visualization on Smart View

7. Tap the gear button  at the bottom of the screen (Figure 28) to choose the fields that should appear on Smart View. Tap and move  to reorder the fields.
- For detailed analysis, you can apply grouping, filtering, totaling, sorting etc. on the chosen dataset.

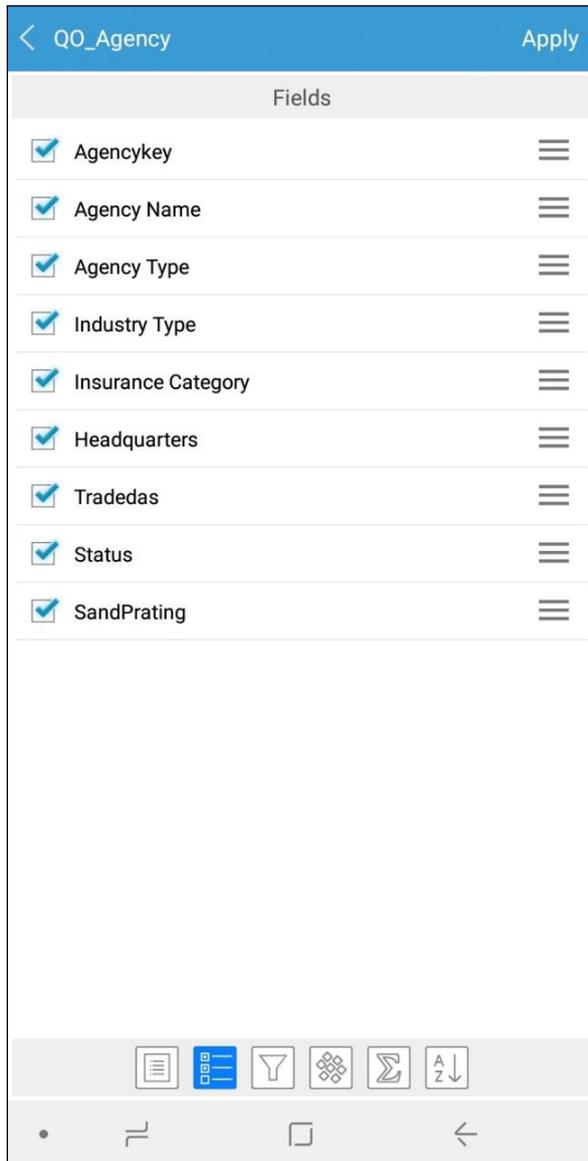


Figure 29: Grid operations on Smart View

8. You can also analyze your data in the form of charts by tapping the “Analyze” option on Figure 27. Intellicus enables to choose from a wide variety of charts to build visually rich reports on your mobile device.

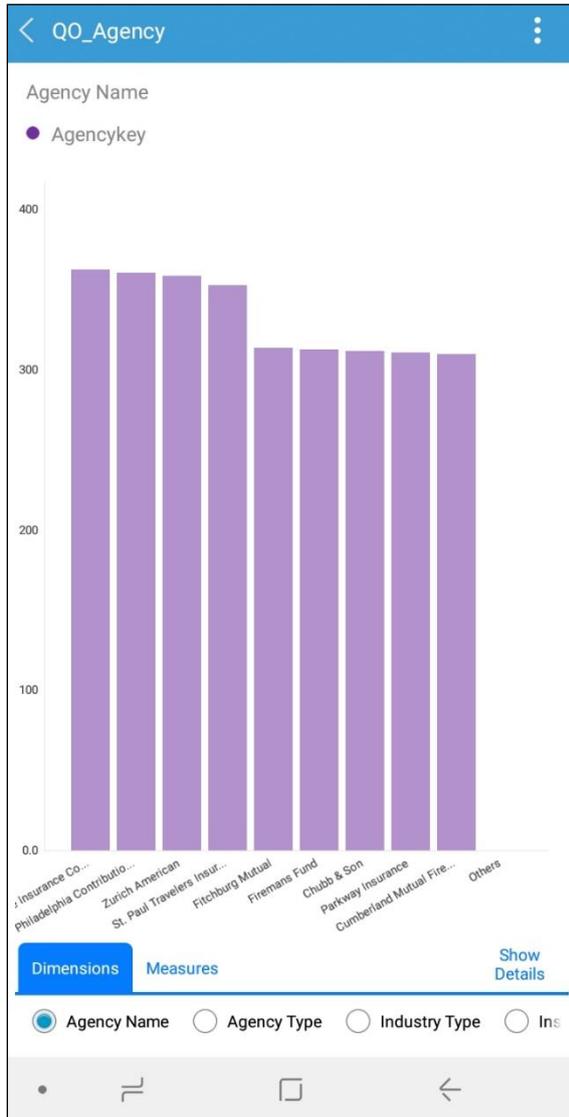


Figure 30: Chart visualization on Smart View

You can save the Smart View at any time while browsing or analyzing the data. Tap the ellipsis icon  on an android device or  on an iOS device to choose the option to save the view.

9. Tapping “Update Dataset” on Figure 27 fetches the recent dataset from the server.
10. You can choose the below operations to perform on the dataset listing.
 - Import: To import more datasets from Intellicus server. Tap “Import” on an android device or iOS device to select the import option.
 - Update All: To fetch all the recent datasets which have been listed from Intellicus server. Tap the ellipsis icon  on an android device to select the “Update All” option.

- **Manage or Edit:** Tap the ellipsis icon  on an android device to either delete or update the individual dataset from the server. Alternately, you can tap “Edit” on an iOS device to delete a dataset.

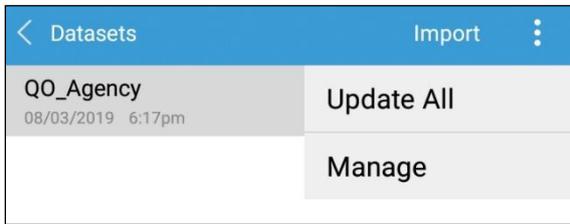


Figure 31: Operations on Dataset listing

11. Similarly, analysis can be done on smart, standard, ad hoc and OLAP reports by tapping “Reports” on the Home screen.
12. Intellicus High Speed Reports extend to mobile devices. Tap “High Speed View” to subscribe and analyze cube object from Intellicus server. Tap “Subscribe” to import cube objects from Intellicus server.
13. Select a cube object and tap “View” to view and analyze as shown in Figure 32.

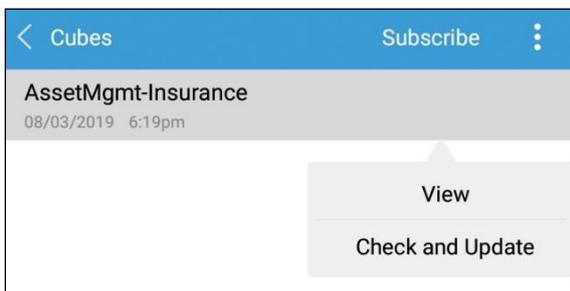


Figure 32: Cube Objects' operations

On viewing the cube object, you see the measures and dimensions on the High Speed View as shown in Figure 33.

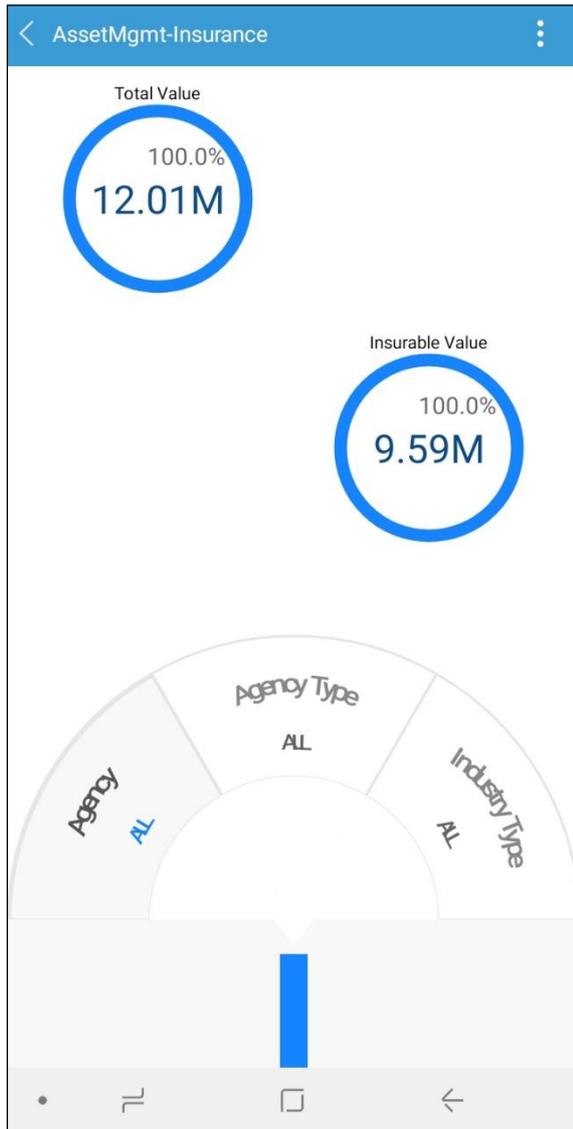


Figure 33: High Speed View

You can swipe the screen or spin the wheel in case of more than measures or dimensions that can fit the screen. If you have only 2 dimensions, 1 dummy dimension gets added to the wheel.

You can select specific dimension values on the dimension wheel to view their corresponding measure values and percentiles as shown in Figure 34.

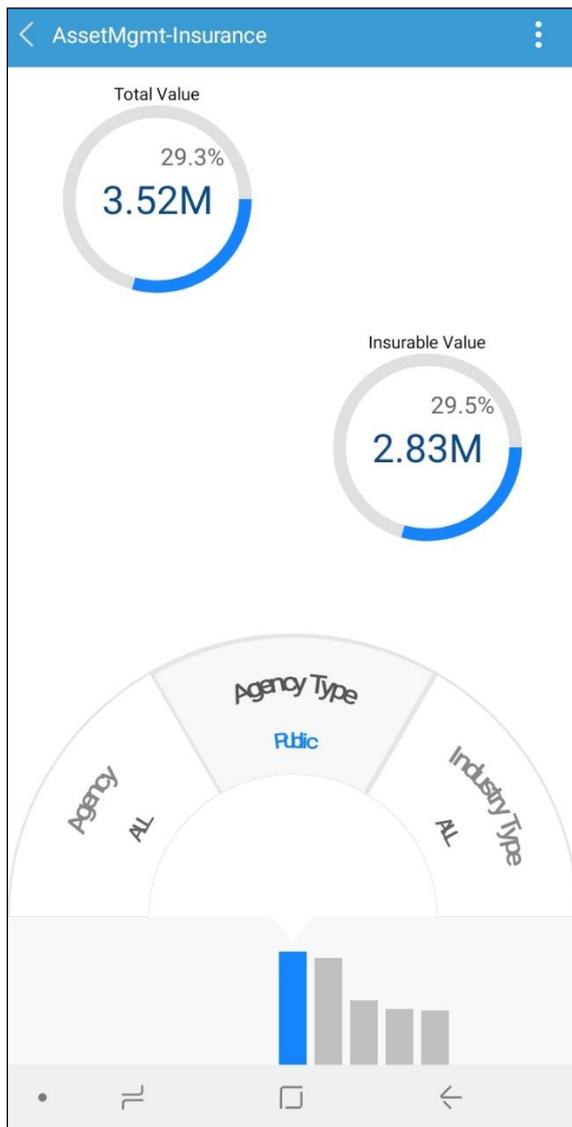


Figure 34: Specific Dimension selected on High Speed View

Tapping “Check and Update” on Figure 32 checks if the selected cube has been rebuilt since last fetched and thereby fetches the recent cube data from the server.

14. Tap “Dashboards” on the Home screen to import and view Intellicus’ interactive dashboards. Tap the “Import” button to import the already created dashboards from Intellicus server.

Once imported, you see the dashboard listing on the mobile device. Select a dashboard and tap “View” to see the dashboard.

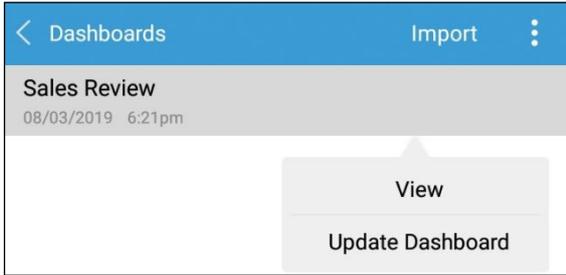


Figure 35: View Dashboard on mobile device

The dashboard appears as shown in Figure 36. The widgets can be scrolled up and down using the arrows.

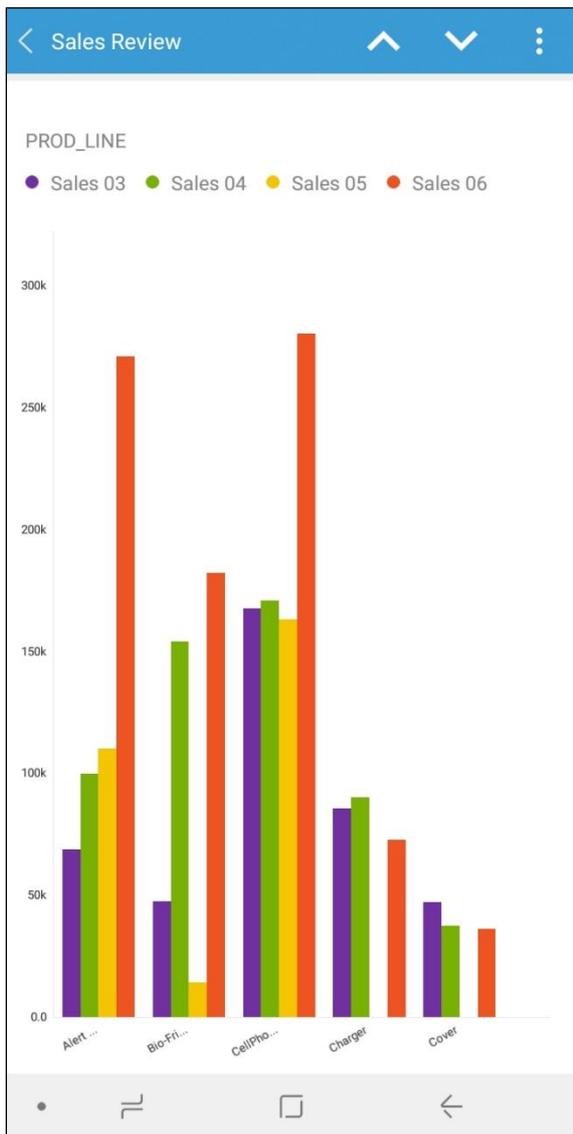


Figure 36: Dashboard on mobile device

15. On Home screen, tap the “Settings” button to connect to a different Intellicus server in case of multiple servers in your network. You can either add a new server or edit an existing one.

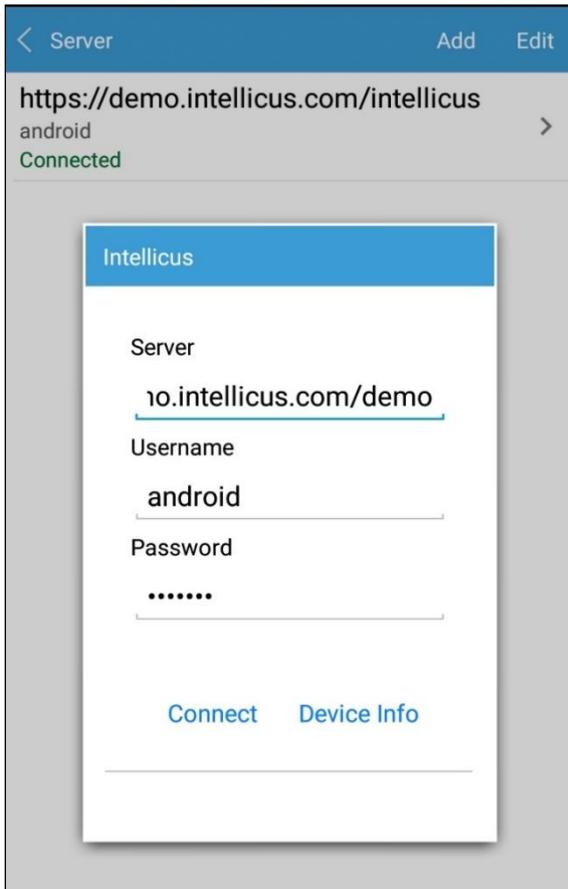


Figure 37: Server Settings

16. To set a default server, in settings tap “Default Server” so as whenever you import or subscribe reports, dashboards, datasets, and/or cube objects, by default the data is displayed as on this server.
17. With the “Security” option on “Settings” page, you can do the following:
Enable Passcode: By enabling passcode, every time you open the Intellicus application on mobile, you are prompted to enter a passcode to be able to view the content inside the application. If you want to secure who access Intellicus application on your device, keep this as On.
18. “Reports” option on “Settings” page
In Standard reports, you can view saved snapshots (published instance of report). Here you can set the maximum number of snapshots you want your mobile device to hold. The minimum being 1, the maximum that can be saved is 10.
19. “Auto Update” option on “Settings” page
Auto Update setting allows you to update data automatically every time:
- You open a report or a dashboard to view: To allow your report or dashboard to update with the latest dataset from the Intellicus server every time you open them, set On View Report/ Dashboard to On.

- You change a parameter in your report or dashboard: To allow your reports or dashboards to update every time you make a change in parameter, set On Parameter Change to On.

20. “Device Information” on “Settings” page

This setting displays the Unique Id of the mobile device. This id acts as an identification of the device on Intellicus web server.

5 Backup and Restore User Data

During Intellicus usage, you create objects like Categories, Reports, Query Objects, Dashboards etc. To protect your data/ metadata and retrieve the same in future running instances, you need backup of these objects. You can take backup of data using the below methods.

Backup Using Intellicus' iPackager tool

Intellicus' iPackager is a utility to package repository objects, users' preferences and configuration settings from Intellicus repository or local file system in a single file (cab file). This packaged information can then be deployed at any installation site of Intellicus. To know more about iPackager, refer "iPackagerManual.pdf" and "DeployingRepositoryBundle.pdf" under <https://www.intellicus.com/product/documents/manuals/18.1/>

Upgrading Database Repository

All the Intellicus objects are stored in database repository (Oracle, MS SQL, MySQL or many more). If your reports objects are stored in such a repository, you can simply point to your database repository in new Intellicus version. Intellicus application will automatically upgrade these objects during Report Engine boot-up.

Note: Please take backup of repository database before performing this step.

Backup using Azure Recovery Services vault

You can use Azure' Recovery Services vault to back up (or protect) and restore your data in the Microsoft cloud for future use or in case of any crashing of system or unintended deletion of files by user. To know about the methods by which you can take backup and restore data, refer <https://docs.microsoft.com/en-us/azure/backup/>

Note: If you try to launch a new instance from VM and bring up Intellicus, the application will not start. However, you can retrieve required files from this instance and use in another already working instance.