



SharePlex[®] AI Insights 1.0

Installation and Setup Guide



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SharePlex AI Insights - Installation and Setup Guide

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SharePlex AI Insights

SharePlex AI Insights is an AI-powered observability and advisory platform designed to analyze SharePlex replication processes in real time, including operational and performance metrics.

It provides actionable insights, tuning parameter recommendations, and operational guidance for configured SharePlex streams through an intuitive user interface and a secure backend API.

The platform is fully containerized and runs on **Docker Compose**, making it easy to deploy both locally and in cloud environments.

Key Features

- **Web UI:**
 - Interactive dashboards for monitoring stream-based process statistics, AI based performance bottlenecks analysis and AI chat-style assistance
- **AI advisor**
 - Process based performance bottleneck detection for SharePlex Capture & Poster processes.
 - SharePlex configuration and tuning parameter recommendations
- **Secure backend API**
 - Token-based authentication
 - Licensing validation
- **Dockerized deployment**
 - One-command startup using Docker Compose

System Requirements

Supported Operating Systems

Component	Supported operating systems
Host Machine	Linux (RHEL 8+ [verified])
Container Runtime	Docker-compatible OS

Hardware Requirements

Minimum (POC/Testing)

Resource	Requirement
CPU	2-4 CPUs
Memory	Minimum 8GB RAM
Disk	Minimum 750MB for app installation
Network	Low Latency access to SharePlex hosts

Recommendation (Production)

Resource	Requirement
CPU	4-8 CPUs or more
Memory	Minimum 16-32 GB RAM
Disk	Minimum 750MB for app installation
Network	Low Latency access to SharePlex hosts

Software Dependencies

Installed on VM:

Software	Version requirement
Docker + Compose	28.5+

Auto-installed in Docker container:

Node.js	18+
Python	3.12+
Sqlite	3.26+
gunicorn	23.0.0
uvicorn-worker	0.4.0 +
nginx	Alpine
Fluent Bit	v3.2.10
InfluxDB	3 Core, 3.9.1

Network and Port Requirements

Port [default]	Purpose
22	SSH access to SharePlex host
443	HTTPS
quest.shareplex-ai-insights	HOST_IP

SharePlex-Insights Access Requirements

- Read and execute access to:
 - SharePlex installation and var directory path
 - Status and statistics commands execution through sp_ctrl
- Mandatory SSH access to SharePlex host

Security Requirements

- Token-based authentication (OIDC)
- Valid SharePlex-insights License

Installation Process

Pre-Installation Checklist

NOTE: If a beta package was previously installed, it is now obsolete due to a change in the URL from `quest.shareplex-insights` to `quest.shareplex-ai-insights`. As a result, Docker configurations, certain parameters, and licensing authentication have also changed. Perform a fresh installation of this version in a different directory path.

Users need to ensure the following prerequisites are met:

- Docker and Docker Compose installed
- Network connectivity to SharePlex hosts
- Required ports are open
- QIB Service account credentials available

Install Docker and Docker Compose

Linux

```
sudo yum install docker -y  
sudo yum install docker-compose-plugin  
sudo systemctl start docker  
sudo systemctl enable docker
```

Verify

```
docker --version  
docker compose version
```

Download & install SharePlex AI insights

Deployment file

```
shareplex_ai_insights.tar.gz
```

Untar file

```
tar -xvf shareplex_ai_insights.tar.gz
```

Deployment package contents

The deployment package includes the following components:

- **Setup** - executable setup utility
- **traefik/** – directory for SSL configuration
- **ssl/** – directory containing SSL certificates
- **docker-compose.yml**
- **shareplex_ai_insights_images.tar** – Docker images

Modify system level hosts file

Modify system level hosts file for DNS name at client computer.

Example of hosts file entry for BETA environment:

```
# localhost name resolution is handled within DNS itself.
# 127.0.0.1 localhost
# ::1 localhost

10.3.80.56 quest.shareplex-ai-insights
```

SharePlex Insight setup utility

The setup utility configures the parameters required for the application to run. It loads the Docker images included in the package and starts the application using the Docker Compose command.

Procedure

1. Navigate to the directory where the deployment package is extracted.
2. Run the setup executable from the same directory: # ./setup
3. Follow the instructions and respond to the prompts. Default values are provided in square brackets ([]).

Setup utility prompts and responses

Prompt	Response
Enter your license friendly name?	Enter a preferred license instance name. By default, the hostname is used if available.
# Previously set license friendly name found: sample-hostname Do you wish to change it? [Y/N]	If a previous configuration is detected, the existing name is used by default. Change it only if: <ul style="list-style-type: none">• The name has not yet been registered for licensing, or• You intend to use a different user than before.
Enter the default logging level	Valid logging level options are DEBUG , INFO , WARNING , ERROR , and CRITICAL . The default is INFO for all modules except the monitoring service, which is set to WARNING for optimal performance. Use DEBUG only for troubleshooting, as it may impact performance.
Do you want to set different log levels for individual components? [Y/N]	Select Y to configure logging levels for individual modules.

Prompt	Response
	Select N to apply the same logging level across all modules.
Do you want to use SSH key-based authentication? [Y/N]	Select Y to enable SSH key-based authentication for connecting to remote hosts where SharePlex instances are installed. Select N to disable this option.
Enter the full path to your SSH private key file:	Provide the full path to the SSH private key file. Ensure the setup user has read permissions for the file.
Is your SSH key protected with a passphrase? [Y/N]	Select Y if the private key is passphrase-protected; otherwise, select N .
Enter SSH key passphrase (input hidden)	Enter the passphrase for the SSH private key (if applicable).
It requires Fluent bit installation [Y/N]	Select Y to enable advanced remote log collection for failure analysis. Select N to skip Fluent Bit installation.
# Previously set Fluent Bit username found: <username> Do you want to change Fluent Bit credentials? [Y/N]:	If previous credentials exist, they are reused by default. Select Y to reconfigure credentials, or N to continue using existing ones.
Enter Fluent Bit username	Enter the username for Fluent Bit.
Enter Fluent Bit password (input hidden)	Enter the password for Fluent Bit. <div style="border: 1px solid black; padding: 5px;">NOTE: These credentials must also be configured in the fluent-bit.conf file on the host where SharePlex is installed.</div>
Save this configuration? [Y/N]	Select Y to save the configuration after verifying the details. Select N to discard changes.
Does your Docker installation requires sudo access? [Y/N]	Select Y if Docker commands require root privileges (for example, <code>sudo docker ps</code>). Select N if sudo is not required.

Access UI

Open browser: [Windows/Linux]

<https://quest.shareplex-ai-insights/>

Fluent Bit installation and configuration

SharePlex AI Insights server environment built-in defaults

Fluent Bit and InfluxDB are installed and started by default within the Docker backend container.

An InfluxDB access token is automatically generated and configured as an environment variable. This enables the supervisor service to access InfluxDB for the Fluent Bit server.

Enabling remote log gathering (server side)

During the SharePlex AI Insights setup, if you select 'Y' for the following prompt:

```
Do you want to use remote logs gathering for failure analysis feature? It requires  
Fluent Bit installation [Y/n]:
```

then you must perform the steps described below to configure Fluent Bit on the servers where SharePlex is installed. Otherwise, this section can be skipped.

SharePlex client machine configuration

To send logs from SharePlex instances to the SharePlex AI Insights server, users must install and configure Fluent Bit on each SharePlex host virtual machine.

1. **Install Fluent Bit on the client machines.**

<https://docs.fluentbit.io/manual/installation/downloads/linux/redhat-centos>

NOTE: Refer to the **FAQ** section on the above web page for any 404-related errors during installation.

2. **Configure DNS.**

Update DNS or the `/etc/hosts` file on the SharePlex client machines to ensure that the SharePlex AI Insights server hostname (`<hostname> quest.shareplex-ai-insights`) can be resolved.

3. **Configure the Fluent Bit client.**

- a. Update the `fluent-bit.conf` file on the client machines to forward data to the SharePlex AI Insights server.
- b. Configure authentication using the username and password created via [SharePlex Insight setup utility](#) in the `fluent-bit.conf` [OUTPUT] section.

4. **Configure the parser.**

Set up the parser configuration file according to the required logging logic to ensure logs are properly formatted before transmission.

Configuration examples

Main configuration (/etc/fluent-bit/fluent-bit.conf)

```
# =====
# SERVICE: Log level and parser file location
# =====
[SERVICE]
    Flush          5
    Daemon         Off
    Log_Level      info
    Parsers_File   /etc/fluent-bit/parsers.conf
    Log_File       /var/log/fluent-bit/fluent-bit.log

# =====
# INPUT: Tail SharePlex event_log
# =====
[INPUT]
    Name           tail
    Path           /opt/shareplex/var/log/event_log
    Tag            shareplex.event_log
    Read_from_Head False
    Skip_Long_Lines On
    Buffer_Chunk_Size 32k
    Buffer_Max_Size 256k
    Refresh_Interval 5

# =====
# FILTER: Parse log to extract fields
# =====
[FILTER]
    Name           parser
    Match          shareplex.*
    Key_Name       log
    Parser         shareplex_event
    Reserve_Data   On
    Preserve_Key   Off

# =====
# FILTER: Keep only Error and Warning
# =====
[FILTER]
    Name           grep
    Match          shareplex.*
    Regex          level ^(Error|Warning)$

# =====
# FILTER: Add metadata
# =====
[FILTER]
    Name           record_modifier
    Match          shareplex.event_log
    Record         instance_key {INSTANCE_KEY_NAMED_IN_INSIGHTS}
```

```

Record      hostname ${HOSTNAME}
Record      log_type event_log
Record      collected_by fluent-bit-agent

# =====
# OUTPUT: Forward to SharePlex Insights
# =====
[OUTPUT]
  Name      http
  Match     shareplex.*
  Host      quest.shareplex-ai-insights
  Port      443
  URI       /fluent-bit
  Format     json
  TLS       On
  TLS.Verify On
  TLS.CA_File /etc/fluent-bit/cert.pem
  http_user {USER_CONFIGURED_DURING_INSIGHTS_SETUP}
  http_passwd {PASSWORD_CONFIGURED_DURING_INSIGHTS_SETUP}
  Header    Content-Type application/json
  Retry_Limit 5

```

Parser configuration (/etc/fluent-bit/parsers.conf)

```

[PARSER]
  Name      shareplex_event
  Format     regex
  Regex     ^(?<level>\w+)\s+(?<timestamp>\d{4}-\d{2}-\d{2}\s+\d{2}:\d{2}:\d{2}\.\d+)\s+(?<pid>\d+)\s+(?<thread>\d+)\s+(?<message>.*)*$

```

Configuring multiple SharePlex instances on a single machine

If there are multiple inputs for multiple SharePlex instances on a single machine, you must define a dedicated [INPUT] block with a unique `Tag` for each instance. Additionally, a dedicated [FILTER] constraint of type `record_modifier` must be added for each input.

Ensure the `Match` property aligns with the respective input `Tag`, and the `instance_key` record matches the key provided in the Insights configuration.

Example:

```

[FILTER]
  Name      record_modifier
  Match     shareplex.event_log_instance2
  Record    instance_key {INSTANCE_KEY_NAMED_IN_INSIGHTS}

```

```
Record      hostname ${HOSTNAME}
Record      log_type event_log
Record      collected_by fluent-bit-agent
```

TLS certificate requirement when TLS.Verify is on

When `TLS.Verify` is set to **on**, the SharePlex AI Insights server's public SSL certificate must be copied to the SharePlex client machine so that Fluent Bit can verify the server identity during the TLS handshake.

Procedure to configure the certificate:

1. On the SharePlex AI Insights server, locate the public SSL certificate in the `ssl/` directory of the Insights installation (Example: `cert.pem` or `ssl/server.crt`).
2. Copy the certificate file to the SharePlex client machine. The recommended destination path is `TLS.CA_File /etc/fluent-bit/cert.pem`.
3. Ensure the `TLS.CA_File` property in the `[OUTPUT]` block points to the full path of the copied file. Example:
`TLS.CA_File /etc/fluent-bit/cert.pem`

To disable verification:

1. Set `TLS.Verify` to **Off**.
2. Remove the `TLS.CA_File` line.

Test Fluent Bit client connectivity

Method 1 — Fluent Bit log (automatic)

When a SharePlex Warning or Error event is captured from the event log and successfully forwarded to the server, the following entries appear in the Fluent Bit log (`fluent-bit.log`):

```
[debug] [upstream] KA connection #123 to quest.shareplex-ai-insights:443 is connected
[debug] [http_client] not using http_proxy for header
[ info] [output:http:http.1] quest.shareplex-ai-insights:443, HTTP status=200
```

Method 2 — Manual connection test (curl)

To verify connectivity without waiting for a real SharePlex event, run a curl command on the Fluent Bit client machine to send a test record in the same format produced by the Fluent Bit parser and `record_modifier` filters:

Use below command if `TLS.Verify` is switched on:

```
curl -v \  
-u <fluent-bit-username>:<fluent-bit-password> \  
-X POST \  
-H "Content-Type: application/json" \  
--cacert /etc/fluent-bit/cert.pem \  
-d '{\  
  "level": "Warning",\  
  "timestamp": "2026-04-13 06:30:00.000000",\  
  "pid": "12345",\  
  "thread": "1",\  
  "message": "Poster: Test table out of sync at source rowid AAATestAABAATestAAA: Row Not Found (posting from o.testdb, queue test_post, to o.testdb)",\  
  "instance_key": "<your-instance-key>",\  
  "hostname": "<your-hostname>",\  
  "log_type": "event_log"\  
}' \  
https://quest.shareplex-ai-insights/fluent-bit
```

Use below command if `TLS.Verify` is off

```
curl -v \  
-u <fluent-bit-username>:<fluent-bit-password> \  
-X POST \  
-H "Content-Type: application/json" \  
-k \  
-d '{\  
  "level": "Warning",\  
  "timestamp": "2026-04-13 06:30:00.000000",\  
  "pid": "12345",\  
  "thread": "1",\  
  "message": "Poster: Test table out of sync at source rowid AAATestAABAATestAAA: Row Not Found (posting from o.testdb, queue test_post, to o.testdb)",\  
  "instance_key": "<your-instance-key>",\  
  "hostname": "<your-hostname>",\  
  "log_type": "event_log"\  
}' \  
https://quest.shareplex-ai-insights/fluent-bit
```

Replace `<fluent-bit-username>`, `<fluent-bit-password>`, `<your-instance-key>`, and `<your-hostname>` with the configured values.

Successful response

SSL certificate verify ok.

HTTP/2 200

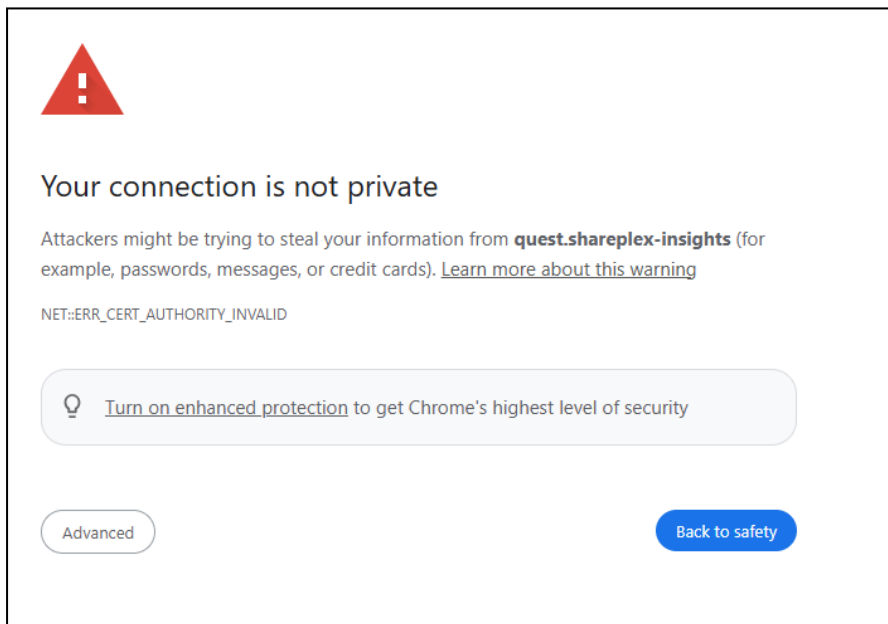
Response interpretation

Response	Interpretation
HTTP/2 200	Connected — server accepted the record
HTTP/2 401	Authentication failed — check username/password
SSL certificate verify failed	Wrong or outdated cert.pem — replace with current server certificate
Could not resolve host	DNS not configured — add entry to <code>/etc/hosts</code>
Failed to connect	Network/firewall blocking port 443

IMPORTANT: Test records sent via `curl` are stored in InfluxDB. After testing, they can be identified using the `hostname test-host-01`.

Install certificate (Optional)

When accessing the UI for first time, the **"Your connection is not private"** warning will appear because a self-signed SSL certificate is used in the beta version.



To resolve this, please choose one of the following options:

Option A: Install a self signed SSL certificate

1. Click **Not secure**, then click **Certificate details**.
2. Click the **Details** tab, and then click **Export**.
3. Navigate to the certificate exported path and double-click the file to begin installation.
The **Certificate Import Wizard** will open.
4. Click **Install Certificate**.
5. Select **Current User** or **Local Machine** and then click **Next**.
6. Choose **Place all certificates in the following store**, then click **Browse**.
7. Select **Trusted Root Certification Authorities**.
8. Click **Next**, then **Finish**.
9. A security warning message will appear - click **Yes**.
10. After receiving the confirmation message, restart your browser.

Option B: Bypass the warning

1. Click **Advanced**.
2. Proceed to the site and allow the connection, ignoring the warning.

Uninstallation

Uninstall the SharePlex - Insights application using the following instructions:

1. Turn off the running application using the `docker compose down` command, or stop the application and remove all associated volume data using the `docker compose down -v` command.
2. (Optional) Remove images:

```
docker rmi shareplex_ai_insights_frontend:v1
docker rmi shareplex_ai_insights_backend:v1
docker rmi shareplex_ai_insights_mcp:v1
```

Troubleshooting Tips

SharePlex Insight logs

Use the following commands to view and monitor specific log files:

```
sudo docker exec -it shareplex_ai_insights_backend tail -f /logs/api.log
sudo docker exec -it shareplex_ai_insights_backend tail -f /logs/monitor.log
sudo docker exec shareplex_ai_insights_frontend tail -f /logs/nginx_access.log
sudo docker exec shareplex_ai_insights_frontend tail -f /logs/nginx_error.log
```


Issue	HTTP	Category	Log Message Pattern	Resolution
invalid token			expired token signature	application. Run the following commands in the directory where the SharePlex Insight package is installed: \$ [sudo] docker compose down \$ [sudo] docker compose up -d
Invalid_token / expired	401	Auth	Token validation error:	JWT expired – re-login; or OIDC server unreachable (check AUTHORITY URL)
No refresh token	401	Auth	No refresh token found in cookies	Both cookies expired – full re-login required
OAuth callback error	4xx	Auth	OAuth callback error:	TOKEN_ENDPOINT unreachable please try again after some time or check with Quest support
Unexpected OAuth error	500	Auth	Unexpected error in OAuth callback: ...	grep OAuth callback /logs/api.log for full traceback and check with Quest support with error details

Licensing issues

License validation runs at login (during the OAuth callback). If validation fails, the user is redirected to `/license-error`, with the error message included as a URL query parameter.

Issue	HTTP	Category	Log Message Pattern	Resolution
license_error	400	License	License acquisition error: ...	Verify CLIENT_MACHINE_HASH in <code>.env</code> matches Licensing Portal fingerprint
license_error (expired)	400	License	License acquisition error: license expired	Renew license in Quest Licensing Portal and re-login with valid user.
Unauthorized AI user	403	License	AI service Unauthorized User Error	Your license does not include AI feature capability. If you have purchased a license with AI access and are still seeing this error, enable it in the Quest Licensing Portal: <ol style="list-style-type: none"> 1. Log in as an admin user. 2. Open the license details under My Licenses > Settings > Features > Enable the AI feature.

About us

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- Submit and manage a Service Request
- View Knowledge Base articles
- Sign up for product notifications
- Download software and technical documentation
- View how-to-videos
- Engage in community discussions
- Chat with support engineers online
- View services to assist you with your product