How to demo the Qlik Sense SaaS demo platform

Friday, September 30, 2016   10:30 AM

Goal: This is instruction should guide the user through the saasdemo.qlik.com demo site. Other key assets to learn the concept and help you use the demo are
- Introduction to the concept
- How to demo video (no audio, and basically the same as this manual)

There are multiple use cases you can focus on:
- The multi-tenant app generation
- The single sign on process
- The web integration part
- The layered approach to self service by using the group of the user (consumer, contributor, developer, admin)
- The row level security using the country group of the user.

Multi-tenant app generation

Go to http://saasdemo.qlik.com. Please study all the text and videos on this page. This ensures you get a good understanding of the concept and our approach. The goal is to share a common approach for implementing Qlik Sense. We try to keep things as simple as possible. If you use this approach it prevent that things get to complicated to fast to understand the basic concept of software integration. This demo site just presents an easy way to solve 80% of OEM use cases.

In the top we explain the concept, and you can press the green button to go to the demo.

Login into the site, just create a new user. With any email and password combination. (**not** linked to your qlik.com account)

Why? If you login you will get a fresh environment, if all users use demo@qlik.com people will remove/edit each other's work… So basically the demo site is a multi-user demo explaining a Sense multi-tenant approach. E.g. some people can already be at step 4, while you just want a fresh environment without any generated stuff.

Now you can start generating content in Qlik Sense by making use of this non Qlik website. This shows the power of our API's. The demo works in 4 steps.

In the left top of the screen, you can always see what the demo expects from you

To make life easy, if you press the button on step 1, we will insert
- Customers with users
- A reference to the guid of the template app (just a normal app, in the templates stream)

Notice the screen updates, and we completed 2 steps

Now we are ready to generate stuff on the Sense side, press generate

Notice you can demo our REST calls:

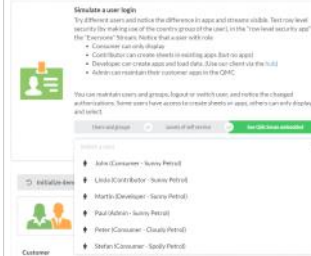|	
	3: API communication is in progress...
	This application is now sending REST and websocket based API calls to the Qlik Sense QRS and Engine API. See more info about API's, the source code, sequence diagrams and a real time API call overview here.
	Action — **Request**
	Notification apps — We got an incoming REST Call from the Sense Notification handler for APPS, this means the Sense Repository has changed
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	If you want to see more click the link

Demo Single Sign On and web integration options

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Now all content is created, so a good time to demo the single sign on capabilities	The demo inserted 3 customers by default. Each customer has users.
You will see the page that demo's that Qlik Sense redirects the user to " your SaaS Platform, to do the authentication" --> only explain this for the security audience, otherwise just press the button. --> you can press the dropdown, to see more info.	**Single sign on (ticket request) redirect demo page** To slow things down for demo purposes we have put a "page in the middle". • between the user trying to access Qlik Sense • and the demo site (your SaaS platform), in which the user is already logged in. So this is a perfect place to get the users id and groups (or any array of fields you would like to use to authorize on) and communicate these values to the Qlik Sense Proxy via the ticketing process. • This allows Qlik Sense to re-use these groups in the resource and "row/column level" authorizations. ▸ Why do you see this page? Read more about Security or Request a ticket for the logged in user
Click on the green button to See Qlik Sense embedded in an external webserver (a non Qlik server). Using this demo you can demonstrate the different web integration options we have • Iframe • DIV • And via the link to the dev-hub you can explain the more difficult stuff if needed.	

Try to select a different users, and demo the difference functionality available. First show the web integration options.
   - Iframe
   - Div
	Show Iframe options
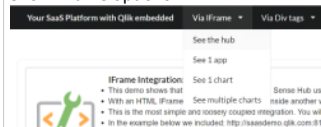	
	Show Div tag integration, resize the screen etc.
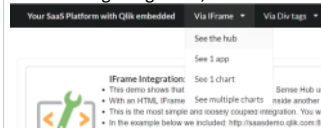	
	Then show what a complete integrated webpage could look like
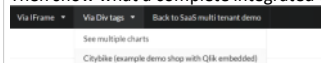
Demo dynamic security using ticketing

Explain our security approach using the videos on the security page. If there are technical people in the room, at least make sure you first show them the complete flow of the web and security integration (only takes 1 minute)

Users with roles

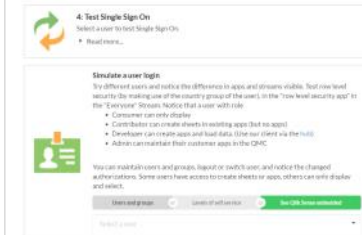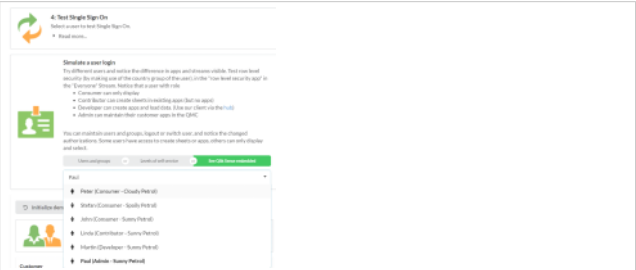|	
In your SaaS platform (this demo platform simulates that), you store users and their roles (see the introduction video for more info about the concept).	
In the demo you can also manage customers and their users.	Via the menu you can always access it Or in step 4, you have the option to press the button " Users and groups"
Here you can change the names of the dummy customers and change users and their roles	You can insert new ones on the right. Or change existing ones on the left. Once you click on a customer name, you can update the users below.
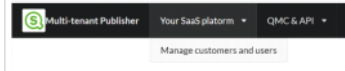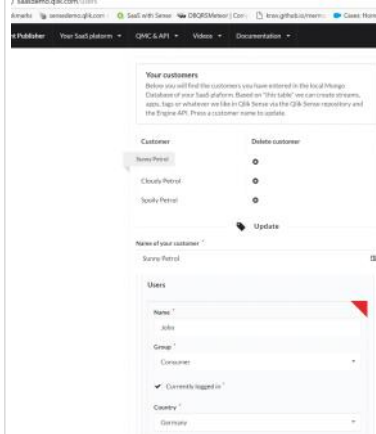
Demo user with consumer role

Let's demo a "display only" use case.
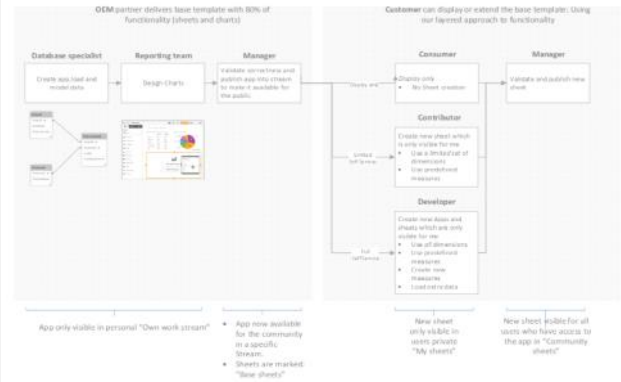
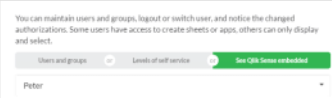|	
Select a user with role consumer. Explain that the OEM partner can implement qlik sense security as he wants it, our concept is flexible. You can also click on "Levels of self service" to explain "an approach" to implement layered access to functionality.	 **Possible self service flow:** Please see the overview of our layered approach to the self service functionality in Qlik Sense
Press the green button	
Press the green ticketing redirect button Note: Each time you switch user you should see this page in between. If you switch a user you simulate the act of a user logging in, into the SaaS platform of the OEM partner. If you don't get this page, something is wrong (incorrect cookie binding), so make sure you press logout in the hub for the test user and restart your browser)	

Demo the possibilities for a display only user. Options to tell are
  • Make selections, store bookmarks, story telling etc.
  • No interactions
  • Fix selections
  • Demo exploration menu (Important: enables user to store user preferences and have a "self service feeling")	
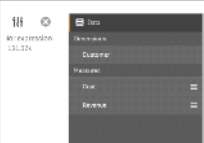
Demo user with role contributor
Let's demo a user that can do a little more compared with the consumer. This user can also create sheets

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Go back to the saasdemo.qlik.com website, and select a user with role contributor: Linda for example	
Press the green button	
Press the green ticketing redirect button Note: We see this screen again, because Meteor now talks with Qlik Sense via the QPS API, and logs out all users for the currently logged in demo user in Meteor.	

• In the hub
  • Nothing new (no new buttons)
• In the app
  • New options to duplicate or create new sheets
  • Demo this possibility
	Select the customer stream, and open one of the apps
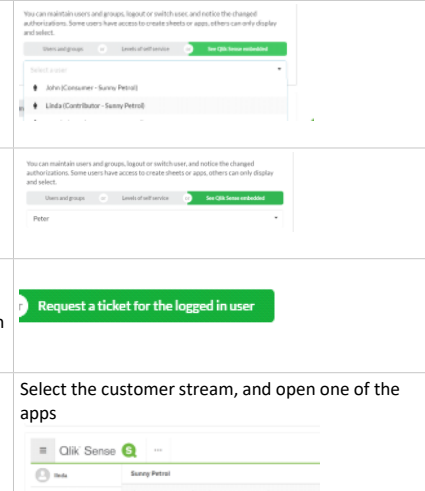
Demo user with role developer

Same as the above, but now show the hub, and demo you can create apps, and drag and drop your favorite excel (or whatever) to load data

Demo user with role admin

This is a special user, it demonstrates Qlik Sense has multi-tenant QMC possibilities

Select a user with role admin	
Now go to the QMC menu	
Demo the restricted access to streams, apps, app.objects	

Row level security demo

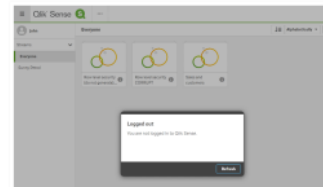|	
Now show that each users is member of certain groups, we can re-use those groups in section access	
So select user john and open the row level security app in the everyone stream	
Select the overview sheet, and notice the amount of customers visible, and show the country field that only shows the country of the group we selected with the user.	
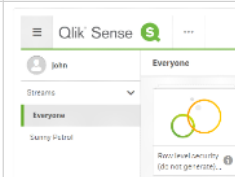
Select user linda, and keep the tab in your browser open (or just re-do all the steps above). If you keep the screen open, you can also demo that your SaaS platform can control the login/logout status of Qlik Sense, so no strange behaviors!)

Press F5 (or [press refresh in your browser), press the green button again, and hey! We switched user!

Now, using the same URL in the browser (!), another user sees only his authorized data.