How to demo the Qlik Sense SaaS demo platform

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10:30 AM

Goal: This is instruction should guide the user through the [saasdemo.qlik.com](http://saasdemo.qlik.com) demo site. Other key assets to learn the concept and help you use the demo are

* [Introduction to the concept](https://youtu.be/JwBOco6fozo?list=PLqJfqgR62cVAZxS34WGnByjASKrGf0Fpk)
* [How to demo video](https://youtu.be/T9a3s5cnvPE) (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

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| 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. | The power of API's; the SaaS with QIik Sense demo platform  What is the concept which we try to explain in this demo? Well  today we will show you how you can easily demonstrate the power  of the QIik Sense APIs to customers and partners to fully extend and  take advantage of QIik Sense to embed analytics within a multi-  tenant SaaS application environment.  Read more or Introduction video  How to use the demo?  To put it simply, this demo shows you how you can copy an app  (dashboard) which serves as a "template layout" for each of your  customers. Next to creating a copy, we will also reload the app with  data from the customers database. Because you can insert a custom  script you can also specify customer specific data models like  "custom fields and tables" or create them on the fly in order to  connect to big data sources. In the end we make a stream per  customer and publish the app into this stream.  Read more or  "How to" Video  Go to the demo  or  SaaS API automation — a deep dive  Automated Activities  Create stream  Copy app  Replace script  Reload data  ill  Template (app)  Your broker  (REST)  Your configuration database  Customer table  Connection strings  User & passwords  Script Example  User rights  Connect to Shen database  QIik Sense Enterprise  Customer  stream  iii  Shell  Sales  Tables  Select • from sales  Select • from customer  Select • from product  Qiik@  Definition of data model  • including custom fields and tables  Using this new script we can then reload the app in which we  basically make a compressed copy of the data and create  the associative model stored inside the app. |
| 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 others work… So basically the demo site is a muli-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. | Read more or  "How to" Video or  Go to the demo    Sign In  Sign In with Google  OR  Email  demo@qlik.com  Password  1  Sign In  Must be logged in  Don't have an account? Reg• ter |
| 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. | 1  Insert Customers  For demo purposes; Insert customers and users  (In real life you forward them dynamically  from your SaaS platform to QIik Sense)  2  Select the template  This is just a regular app you created using the hub  and published in the templates stream  3  Generate  Create a stream, copy app, insert script,  reload and publish the app for each customer  4  Completed  Now test Single Sign On  including dynamic groups    In the left top of the screen, you can always see what the demo expects from you  1: Let's start publishing apps for your customers  First insert some customers with users in your SaaS platform.  • You can use these customers later on to generate streams and  apps.  • You can use the users to test the single sign and our layered  approach to governed self service in step 4. |
| 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) | No customers  This demo simulates the first day of your SaaS platform.  Therefore we first need to insert some customers in your  SaaS platform using the button below. Note that we don't  have to create users or groups in QIik Sense.  1: Insert ustomers    Notice the screen updates, and we completed 2 steps  I nsert Customers  For demo purposes; Insert customers and users  (In real life you forward them dynamically  from your SaaS platform to QIik Sense)  Select the template  This is just a regular app you created using the hub  and published in the templates stream  3  Generate  Create a stream, copy app, insert script,  reload and publish the app for each customer  4  Completed  Now test Single Sign On  including dynamic groups |
| Now we are ready to generate stuff on the Sense side, press generate | 3: Press generate  Press the green generation button to start creating streams and apps for  each of your selected customers.  Read more...  O  Initialize demo  or  3: 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 QIik 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  Notification  apps  Notification  apps  Request  We got an incoming REST Call from the Sense  Notification handler for APPS, this means the Sense  Repository has changed  We got an incoming REST Call from the Sense  Notification handler for APPS, this means the Sense  Repository has changed    If you want to see more click the [link](http://saasdemo.qlik.com/APILogs) |

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.  Simulate a user login  Try ditterent users and notice the difference in apps and streams visible. Test row level  security (by making use of the country group of the user), in the "row level security app" in  the "Everyone" Stream. Notice that a user with role  Consumer can only display  Contributor can create sheets in existing apps (but no apps)  Developer can create apps and load data. (Use our client via the hub)  Admin can maintain their customer apps in the QMC  You can maintain users and groups, logout or switch user, and notice the changed  authorizations. Some users have access to create sheets or apps, others can only display  and select.  Users and groups  Select a user  Levels of self service  See QII* Sense embedded  O  Initialize d  John (Consumer - Sunny Petrol)  Linda (Contributor - Sunny Petrol)  Martin (Developer - Sunny Petrol)  Paul (Admin - Sunny Petrol)  Peter (Consumer - Cloudy Petrol)  Stefan (Consumer - Spoily Petrol)  Customer |
| 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 QIik Sense  • and thedemo site (your SaaS platform), in which the user is already logged in. So this is a perfect place toget the users id and groups (or any  array ot fields you would like to use to authorize on) and communicate these values to the QIik Sense Proxy via the ticketing process.  This allows QIik Sense to re-use these groups in the resource and "row/column level" authorizations.  Why do you see this page?  a ticket in |
| 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. | C (D saasdemo.qlik.com8080/hub  : : Apps Bookmarks sensedemo.qlik.com  knsv_github.io/merma Cases: Home — Salesf Q loc SaaS O TODO apl  Q SaaS with Sense DBQRSMeteor I Conn.  Your SaaS Platform With Qlikembedded Via 'Frame •  Via Div tags  'Frame Integration: Hub  Back to SaaS multi tenant demo  • This demo shows that you can integrate the QIik Sense Hub using an IFrame  With an HTML 'Frame you can show a website inside another website.  • This is the most simple and loosely coupled integration You Will use our QIik Sense client (the Hub) to dis  • In the example below we included: http://saasdemo.qlik.com:81/meteor\hub  • Note that using this generic link, the hub automatically shows only authorized data for the logged in user  Sense with all the information about the user (userld and group memberships). Based on this we have  resourcename (tilter Stream_•) that ensures a nexible authorization concept  QIik' Sense  linda  Streams  Everyon e  Sunny Petrol  Everyone  Row level security  (do not generate)..  o  Row level security  CORRUPT  Sales and  o  customers  o |
| Try to select a different users, and demo the difference functionality available.  First show the web integration options.   * Iframe * Div | Show Iframe options  Your SaaS Platform With QIik embedded  Via 'Frame •  See the hub  See I app  'Frame Integration: See I chart  • This demo shows that  Via Div tags  Sense Hub usinc  With an HTML 'Frame See multiple charts nside another wel  • This is the most simple and loosely coupled Integration You Will u  • In the example below we included: http://saasdemo.qlik.com:81/m    Show Div tag integration, resize the screen etc.  Your SaaS Platform With QIik embedded  Via 'Frame •  See the hub  See I app  'Frame Integration: See I chart  • This demo shows that  Via Div tags  Sense Hub usinc  With an HTML 'Frame See multiple charts nside another wel  • This is the most simple and loosely coupled Integration You Will u  • In the example below we included: http://saasdemo.qlik.com:81/m    Then show what a complete integrated webpage could look like  Via 'Frame •  Via Div tags  Back to SaaS multi tenant demo  See multiple charts  Citybike (example demo shop With QIik embedded) |

Demo dynamic security using ticketing

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| Explain our security approach using the videos on the [security page](http://saasdemo.qlik.com/introductionSecurity). If there are technical people in the room, at ;east make sure you first show them the complete flow of the web and security integration (only takes 1 minute) | Security videos  Overview of the web and security flow (1M)  QIik Sense integrated web and security flow  Olik Sense  Authorization  Contents  This perspective provides more details on the technical integration flow.  Let's walk through it: A user logs in into your multi-tenant SaaS application  platform. Your platform contains some QIik Sense information in an IFrame or  DIV tag. The proxy intercepts the request and redirects the user to the  authentication module of your SaaS platform. Your platform knows the  identity and group membership of the user and It requests an access ticket for  this user. We redirect the user's request back to the proxy, but now with the  ticket number appended to the URL. QIik Sense validates the request and will  set a session cookie. Now the authentication process is completed and Qik  Sense will evaluate the authorizations in two steps. Step 1: security on  resources using the Qik Sense QMC security rules, step 2: row level security  Security cwerview  Contents  QIik @  SaaS with QIik Sense  Security integration  Mwlijn  N eves  2016  In a quick overview you will see the key components for securing a QIik Sense  integration. Your goal is to create within a multi-tenant SaaS platform  environment - embedded analytics - within your core application(s) where  each of your customers would see and use only their data. It's possible for each  customer to have a more fine grained authorization structure  As an example. it is possible to provide authorizations for a specific  department or country within a dashboard. Ultimately you will see a simple  solution in our demonstration in which both of our fictitious users. Peter and  John, go to the same website, but see different things based on their  authorizations. QIik Sense makes this possible because it uses a dynamic  attribute-based security approach in which we re-use all the pre-existing users  and roles from your SaaS platform. This ensures QIik Sense stays automatically  in synch and avoids the overhead of double maintenance.  inside an app using "section access".  Security deep dive  Contents  QIik@  SaaS with QIik Sense  Security "code deep4Ve"  Neves  z016 |

Users with roles

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| In your SaaS platform (this demo platform simulates that), you store users and their roles (see [the introduction video](http://saasdemo.qlik.com) for more info about the concept). | The power of API's; the SaaS with QIik Sense demo platform  What is the concept which we try to explain in this demo? Well  today we will show you how you can easily demonstrate the power  of the QIik Sense APIs to customers and partners to fully extend and  take advantage Of QIik Sense to embed analytics within a multi-  tenant SaaS application environment.  Read more or  Ction v  How to use the demo? |
| In the demo you can also manage customers and their users. | Via the menu you can always access it  ulti-tenant Publisher  Your SaaS platorm •  QMC & API  Manage customers and users    Or in step 4, you have the option to press the button " Users and groups"  4: Test Single Sign On  Select a user to test Single Sign On.  Read more...  Simulate a user login  Try ditterent users and notice the difference in apps and streams visible. Test row level  security (by making use of the country group of the user), in the "row level security app" in  the "Everyone" Stream. Notice that a user with role  Consumer can only display  Contributor can create sheets in existing apps (but no apps)  Developer can create apps and load data. (Use our client via the hub)  Admin can maintain their customer apps in the QMC  You can maintain users and groups, logout or switch user, and notice the changed  authorizations. Some users have access to create sheets or apps, others can only display  and select.  Users and groups  Select a user  Levels of self service  See QII* Sense embedded |
| 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.  )kmarks sensedemo.qlik.com Q SaaS with Sense  It Publisher Your SaaS platorm •  QMC & API  knsv_github.io/mermc  DBQRSMeteor I Conn;  Cases: Home -  Videos •  Documentation •  Your customers  Below you will find the customers you have entered in the local Mongo  Database Of your SaaS plaform. Based on "this table" we can create streams,  apps, tags or whatever we like in Qik Sense via the QIik Sense repository and  the Engine API. Press a customer name to update.  Customer  Sunny Petrol  Cloudy Petrol  Spoily Petrol  Name of your customer  Sunny Petrol  Users  Name  John  Gro up  Consumer  Currently logged in  Country •  Germany  Delete customer  o  o  o  Update |

Demo user with consumer role

Let's demo a "display only" use case.

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| 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. | 4: Test Single Sign On  Select a user to test Single Sign On.  Read more...  Simulate a user login  Try ditterent users and notice the difference in apps and streams visible. Test row level  security (by making use of the country group of the user), in the "row level security app" in  the "Everyone" Stream. Notice that a user with role  Consumer can only display  Contributor can create sheets in existing apps (but no apps)  Developer can create apps and load data. (Use our client via the hub)  Admin can maintain their customer apps in the QMC  You can maintain users and groups, logout or switch user, and notice the changed  authorizations. Some users have access to create sheets or apps, others can only display  and select.  Users and groups  Paul  Levels of self service  See QII* Sense embedded  O  Initialize d  Peter (Consumer - Cloudy Petrol)  Stefan (Consumer - Spoily Petrol)  John (Consumer - Sunny Petrol)  Linda (Contributor - Sunny Petrol)  Martin (Developer - Sunny Petrol)  Paul (Admin - Sunny Petrol)    Possible self service flow:  Please see the overview of our layered approach to the self service functionality in Qik Sense  Databaæ  OEM partner delivers base template with of  fw-,ctmality (sheets and charts)  Ch.-ts  Customer Can display extend the base template;  our to  Conwmer  ind n  App viÆe in persoml "Own mrk  App  for the  in d specific  Stream  Sheets are marked:  "Base sheets"  dimevsiorg  New  sheets"  New -siblerur all  to  the app in "Community  sheets" |
| Press the green button | You can maintain users and groups, logout or switch user, and notice the changed  authorizations. Some users have access to create sheets or apps, others can only display  and select.  Users and groups  Peter  Levels of self service  See QII* Sense embedded |
| 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) | a ticket lcggEZ in |
| Demo the possibilties 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" ) | ти  Ior expression  131.92*  Data  Cugtorner  Меазигез |

Demo user with role contributor

Lets 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 | You can maintain users and groups, logout or switch user, and notice the changed  authorizations. Some users have access to create sheets or apps, others can only display  and select.  Users and groups  Select a user  Levels of self service  See QII* Sense embedded  John (Consumer - Sunny Petrol)  Linda (Contributor - Sunny Petrol) |
| Press the green button | You can maintain users and groups, logout or switch user, and notice the changed  authorizations. Some users have access to create sheets or apps, others can only display  and select.  Users and groups  Peter  Levels of self service  See QII* Sense embedded |
| 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. | a ticket lcggEZ in |
| * + 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  QIik' Sense  linda  Streams  Everyone  Sunny Petrol  Sunny Petrol  Sunny Petrol - My  first template  o  Sunny Petrol - My  o  first template |

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 possibilties

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| Select a user with role admin | You can maintain users and groups, logout or switch user, and notice the changed  authorizations. Some users have access to create sheets or apps, others can only display  and select.  Users and groups  Paul  Levels of self service  See QII* Sense embedded |
| Now go to the QMC menu | C (D saasdemo.qlik.com/generation  . : Apps Bookmarks sensedemo.qlik.com SaaS with Sense  Multi-tenant Publisher  Your SaaS platorm •  QMC&API •  DBQRSMetE  Videos •  Your SaaS platform With QIik Sense embedded  Not integrated, Hub using Single Sign On  Not integrated, QMC using Single Sign On  Manage customers and users |
| Demo the restricted access to streams, apps, app.objects | C O saasdemo.qlik.com81/meteor/qmc/?QlikTicket=ehrvv84k2nvehj3TQ  Apps Bookmarks sensedemo.qlik.com _ SaaS with Sense DBQRSMeteor I Conn;  knsv_github.io/mermc  Apps  Cases: Home — Salesf  oc SaaS  Start  MANAGE CONTENT  Apps  Data connections  App Objects  Streams  MANAGE RESOURCES  Security rules  Cuctom propertie  License and token:  * Extension:  user directory connectors  GOVERNANCE  CONFIGURE SYSTEM  You can see all the available apps from the overview and you  can edit, delete, publish, or duplicate the apps, An app can  be reused, modified, and shared with others.  App objects  You can see all sheets and stories that belong to all of the  apps. You can view the publishing status Of the app objects,  delete them or change their owner.  Streams  You can gee all the available streams from the Nerview, and  you can add, edit, and delete streams. From an authorization  perspective, a stream ig a collection ot apps that a group of  users have read or publish access to. By default, Qik Sense  includes two streams: Everyone and Monitoring apps. |

Row level security demo

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| Now show that each users is member of certain groups, we can re-use those groups in section access | Customer  Sunny Petrol  Cloudy Petrol  Spoily Petrol  Name of your customer  Sunny Petrol  Users  Name  John  Gro up  Consumer  Currently logged in  Country •  Germany  Name  Linda  Group  Contributor  Currently logged in  Country  United States  Delete customer  o  o  o  Update |
| So select user john and open the row level security app in the everyone stream | QIik' Sense  John  Streams  Everyon e  Sunny Petrol  Everyone  Row level security  o  (do not generate).. |
| 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. | Overview  Number of customers  Revenue  663.1k  First Name  Number Of customers  t;  orderlD  Country  Q Country  Germany |
| 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!) | QIik' Sense  john  Streams  Everyon e  Sunny Petrol  Everyone  Row level security  o  (do not generate)...  Alphabetically ,  Row level security  Sales and  o  customers  o  CORRUPT  Logged out  You are not logged in to QIik Sense.  Press F5 (or [press refresh in your browser), press the green button again, and hey! We switched user!  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 QIik Sense  • and thedemo site (your SaaS platform), in which the user is already logged in. So this is a perfect placetoget the users ic  array ot fields you would like to use to authorize on) and communicate these values to the QIik Sense Proxy via the ticke  This allows QIik Sense to re-use these groups in the resource and " row/column level" authorizations.  Why do you see this page?  a ticket logged in  Now, using the same URL in the browser (!), another user sees only his authorized data.  C O saasdemo.qlik.com81/meteor/sense/app/7c4de83d•51 fl •4edO•a7c1 •60414d9e1713/sheet/puEpZK/state/analysis  Apps Bookmarks sensedemo.qlik.com f SaaS with Sense DBQRSMeteor I Comp  knsv.github.io/merme Cases: Home — Salesf  E Rowlevel security (do not  m No selections applied  loc SaaS  Cost  o  Overview  Number of customers  Revenue  365.3k  First Name  Number of customers  t;  orderlD  Country  Q Country  United States |