

Demo Interface Project

Configuration Guide

Installation

1. New VM
 - a. Name: Qlik Demo
 - b. OS: Windows Server 2012 R2 Updated Standard Edition
 - c. 60 GB HD
 - d. Changed to 4 GB RAM
 - e. Changed to 4 Processors, 1 CPU
 - f. Changed to Bridged Connection
 - g. User: QlikAdmin
 - h. Pass: Qlik1234
2. Renamed Computer to "qlikserver"
3. Install Sense Enterprise
 - a. Quick Install for Central Node
 - b. RepositoryPW: Qlik1234
 - c. Admin User: QlikAdmin
 - d. Apply Internal License with any user: (like Qlik2Go), Organization: (like Qlik)
 - e. Apply DataMarket License (same creds)
 - f. Allocate License to QlikAdmin

Sense Configuration

1. Add Windows Users
 - a. Password: Qlik1234
 - b. Settings UNCHECK - "User must change password at next login"
 - c. Settings CHECK - "Password never expires"

User Name	Full Name	Description
a_small	Arlyn Small	VP Human Resources USA
d_adams	Diane Adams	CPO (Chief People Officer)
demo	Demo	Other Demos User
e_bracke	Eric Bracke	Director Supply Chain
e_johnson	Eric Johnson	President Sales Americas
l_bjork	Lars Björk	CEO
r_timperlake	Richard Timperlake	SVP Sales
t_maccarrick	Tim MacCarrick	CFO
x_oleron	Xavier Oleron	VP Customer Support

- d. Create User Directory Connector
 - i. SELECT - Local Network
 - ii. UNCHECK "Fetch user data on first access, then keep in sync"
 - iii. RUN this sync

- e. Allocate Tokens to each of these users
2. Import the Qlik2Go Apps

Customer Service & Call Center
Executive Performance Mgmt
Expense Management and Cost Transparency
Finance Sales and Operational Planning
Manufacturing Operations
Marketing Leads and Campaign Performance
Operations, Orders and Logistics
Sales Management and Customers Analysis
Sales Performance, Pipeline and Productivity
Workforce Performance and Talent Analytics

3. Create Custom Property = **QlikGroup**
 - a. Resource Types: **Apps, Streams, Users**
 - b. Values:

Admin
Customer Support
Demo
Executive
Finance and Operations
Human Resources
Sales and Marketing
Supply Chain

4. Assign Users to QlikGroup(s)

User Name	QlikGroup
a_small	Human Resources
d_adams	Human Resources
demo	Demo
e_bracke	Supply Chain
e_johnson	Sales and Marketing
l_bjork	Executive
r_timperlake	Sales and Marketing
t_maccarrick	Finance and Operations
x_oleron	Customer Support

5. Create Streams and Assign QlikGroup to it
 - a. After hitting Apply the default security rule will pop up – hit CANCEL

- b. You will see a warning that no rule has been created – that’s okay, we will create a generic rule to handle all streams

Warning! There are no rules associated with the stream. The stream is fully operational but has no dedicated rules to grant access to read/publish apps. You can create and delete associated security rules in the Security rules section in the associated items panel.

Successfully added new stream

Stream Name	QlikGroup
Demo	Demo
Customer Service & Support	Customer Support
Executive Dashboards	Executive
Finance and Operations	Finance and Operations
Human Resources	Human Resources
Sales and Marketing	Sales and Marketing
Supply Chain	Supply Chain
Monitoring Apps <i>*already exists</i>	Admin

6. Publish Applications to Streams **AND** apply group directly to app if specified

Application	Stream	QlikGroup
Customer Service & Call Center	Customer Service & Support	
Expense Management and Cost Transparency	Human Resources	Human Resources
Finance Sales and Operational Planning	Finance and Operations	
Manufacturing Operations	Supply Chain	
Marketing Leads and Campaign Performance	Sales and Marketing	
Operations, Orders and Logistics	Customer Service & Support	
Sales Management and Customers Analysis	Sales and Marketing	
Sales Performance, Pipeline and Productivity	Sales and Marketing	
Workforce Performance and Talent Analytics	Human Resources	

Sense Configuration (Security)

We are going to create a series of generic rules to manage users’ roles/rights in the Hub and QMC

- We want to only allow users with a new role “Developer” or RootAdmins to have a “Create App” button and more importantly a “My Work” stream.
 - Let’s start by **disabling** (or delete) the default rule for this -> Rule Name = **CreateApp** so that not ALL users can create apps

Name	Description	Resource filter	Disabled
CreateApp	Everyone is allowed to create apps except anonymous users	App_*	Yes

- Second we need to create the rule below (quick note not seen in screen capture, I assign this role to HUB only)

- c. Don't forget to **assign** this "Developer" role to **Arlyn, Diane** and **Demo** users AFTER creating the security rule

IDENTIFICATION

Create rule from template Unspecified

Name CreateAppDeveloper

Disabled ☐

Description This replaces the default rule "CreateApp" and only allows users with a new role "Developer" or existing Root Admin to have access to the "My Work" stream to create apps

BASIC

Actions ☒ Create ☐ Read ☐ Update ☐ Delete ☐ Export ☐ Publish ☐ Change owner ☐ Change role ☐ Export data

user roles = value Developer

OR

user roles = value RootAdmin

Ungroup

ADVANCED

Resource filter *

Conditions ((user.roles="Developer" or user.roles="RootAdmin"))

2. We also want to remove access to the "Everyone" stream by default and only open it up for RootAdmin and Demo users

- a. So disable access for anonymous users

Name	Description	Resource filter	Actions	Disabled
StreamEveryoneAnonymous	The default stream called Everyone should be visible...	Stream_aaec8d41-5...	Read	Yes

- b. Then modify the existing rule called "StreamEveryone" to only show the "Everyone" stream for users in @QlikGroup = Demo or roles=RootAdmin (not all users should be sharing apps using the everyone stream)

IDENTIFICATION

Name	<input type="text" value="StreamEveryone"/>
Disabled	<input type="checkbox"/>
Description	<input type="text" value="The default stream called Everyone should be visible for all users and all users should be able to publish to it"/>

BASIC

Actions	<input type="checkbox"/> Create <input checked="" type="checkbox"/> Read <input type="checkbox"/> Update <input type="checkbox"/> Delete <input checked="" type="checkbox"/> Publish
	<input type="checkbox"/> Change owner

user

@QlikGroup

=

−

+

value

Demo

OR

Ungroup

user

roles

=

−

+

value

RootAdmin

ADVANCED

Resource filter	<input type="text" value="Stream_aaec8d41-5201-43ab-809f-3063750dfafd"/>
Conditions	<input))"="" demo"="" or="" type="text" user.roles="RootAdmin" value="((user.@QlikGroup="/>

3. This very dynamic rule covers a broad set of scenarios and relies heavily on Custom Property assignments to allow permissions. In this case we will allow users multiple actions in Streams/Apps where the users' @QlikGroup matches the resources @QlikGroup.

IDENTIFICATION

Create rule from template Unspecified

Name QlikGroupDynamicAccess

Disabled ☐

Description If the stream/app QlikGroup matches the users QlikGroup provide access to the stream and/or app respectively

BASIC

Actions ☒ Create ☒ Read ☒ Update ☒ Delete ☐ Export ☒ Publish ☐ Change owner ☐ Change role ☐ Export data

user @QlikGroup = +

resource @QlikGroup

ADVANCED

Resource filter Stream_*,App*

Conditions ((user.@QlikGroup=resource.@QlikGroup))

The rule is valid.

4. In the Hub I would also like to create a Guided Analytics vs Self-Service feel. The difference here will be that a Guided Analytics type of user still gets full access to an app for exploration but cannot modify existing or create new sheets – they CAN however take advantage of collaboration features like take snapshots to add to stories, create bookmarks and then publish those components.

- a. Take Default rule “**CreateAppObjectsPublishedApp**” and modify the conditions where

`or resource.objectType = "sheet"`

should become

`or (resource.objectType = "sheet" and user.roles="SelfServe")`

- b. Don't forget to assign the “**SelfServe**” role to **Eric Johnson** and **Xavier Oleron**

IDENTIFICATION

Name	CreateAppObjectsPublishedApp
Disabled	<input type="checkbox"/>
Description	If you have read rights on an published app you should be able to create sheets, stories, bookmarks and

BASIC

Actions	<input checked="" type="checkbox"/> Create <input type="checkbox"/> Read <input type="checkbox"/> Update <input type="checkbox"/> Delete <input type="checkbox"/> Publish
	<input type="checkbox"/> Change owner

This condition cannot be displayed in the rule editor because it is too complex.

ADVANCED

Resource filter	App.Object_*
Conditions	<pre>!resource.App.stream.Empty() and resource.App.HasPrivilege("read") and (resource.objectType = "userstate" or (resource.objectType = "sheet" and user.roles = "SelfServe") or resource.objectType = "story" or</pre>
	<button>Validate rule</button>
Context	Only in hub

[? Link to Qlik Sense help about security rules](#)

5. This is a rule specifically for QMC section rules. We will provide App, Stream and AppObject section access with a variety of actions where the user has a new role called TeamContentAdmin
 - a. First create the rule below
 - i. The Resource filters are not menu options but should include the following:
QmcSection_App,QmcSection_Stream,QmcSection_App.Object
 - b. Don't forget to **assign** this "**TeamContentAdmin**" role to **Arlyn** after creating the security rule

IDENTIFICATION

Name	<input type="text" value="TeamContentAdmin"/>
Disabled	<input type="checkbox"/>
Description	<input type="text" value="Users can administer the app(s) and stream(s) that they have access to."/>

BASIC

Actions ☒ Create ☒ Read ☒ Update ☒ Delete

<input type="text" value="user"/>	<input type="text" value="roles"/>	<input "="" type="text" value="="/>	<input type="button" value="+"/>
<input type="text" value="value"/>	<input type="text" value="TeamContentAdmin"/>		

ADVANCED

Resource filter

Conditions

Context

Demo Interface Configuration

1. We are going to deploy the landing demo page to the server and piggyback on top of the Qlik Sense Node server running
 - a. Extract the contents of brackedemo.zip file anywhere on the machine
 - b. Open the folder you just extracted and run “copyFiles.bat”
 - i. This will create 3 folder shortcuts on your desktop
 1. Data – contains all QVDs to reload the apps
 2. PinIt – files required for the PinIt dashboard (change configuration)
 3. Landing Page – files required for Demo Interface (change configuration)
 - c. Configure PinIt (optional if you don’t configure the virtual proxy as specified below)
 - i. Open shortcut link, then navigate to the js folder
 - ii. In “**require-config.js**” you need to specify the virtual proxy (line 3)
 1. Default configuration for virtual proxy setup below
 - d. Configure Demo Interface
 - i. Open shortcut link, then navigate to the config folder
 - ii. In “**config.js**” you need to specify the port, hostname, virtualProxyPath and userDomain
 1. Default configuration follows the setup in this document

```
var config = extend(true, {  
  port: 81,  
  hostname: 'qlikserver',  
  virtualProxyPath: 'webticket',  
  userDomain: 'QLIKSERVER',
```

- Pick a port you will access the demo site from (I use 81 when I login in examples below)
- Hostname is the name of the server we’ve configured earlier
- virtualProxyPath is the virtual proxy we will set up in step 2
- userDomain is the domain your users are under when they log in (if you followed these instructions it is the same as the hostname)

- e. Also navigate to the Qlik Service dispatcher configuration (this will tell Qlik to host this site for us) “C:\Program Files\Qlik\Sense\ServiceDispatcher\services.conf” – paste the following in to the file

```
[brackedemo]  
Identity=brackedemo  
Enabled=true  
DisplayName=brackedemo  
ExecType=nodejs  
ExePath=Node\node.exe  
Script=Node\brackedemo\server.js
```

- f. Finally go to the services console and restart “Qlik Sense Service Dispatcher”

2. Create New Virtual Proxy

IDENTIFICATION

Description	webticket
Prefix	webticket
	The prefix must be unique for all virtual proxies used by the same proxy service, as this differentiates the virtual proxies and will be a part of the URL.
Session inactivity timeout (minutes)	30
Session cookie header name	X-Qlik-Session-webticket
	The session cookie header name must be unique for all virtual proxies used by the same proxy service.

AUTHENTICATION

Anonymous access mode	No anonymous user
Authentication method	Ticket
Authentication module redirect URI	http://qlikserver:81/signin

*redirect URI should be <http://qlikserver:81/signin>

LOAD BALANCING

Load balancing nodes	
Server node	
	+ Add new server node
Central	✕

Websocket origin white list	
	+ Add new value
qlikserver	✕

*white list value should be qlikserver

After you hit Apply, ALSO CLICK on Proxies under Associated items to link the Central Proxy

Associated items
Proxies

3. Use your favorite browser – my preferences include
 - a. set the default website to <http://qlikserver:81/>
 - b. set favorite links to include
 - i. Qlik Demo Interface = <http://qlikserver:81/>
 - ii. QMC (Admin) = <http://qlikserver/qmc>
 1. On first login enter QlikAdmin + pwd (I saved these values so chrome autofill would remember for me)
 - iii. Hub (Admin) = <http://qlikserver/hub>
 1. On first login enter QlikAdmin + pwd (I saved these values so chrome autofill would remember for me)