Demo Interface Project

# Configuration Guide

### Installation

1. New VM
   1. Name: Qlik Demo
   2. OS: Windows Server 2012 R2 Updated Standard Edition
   3. 60 GB HD
   4. Changed to 4 GB RAM
   5. Changed to 4 Processors, 1 CPU
   6. Changed to Bridged Connection
   7. User: QlikAdmin
   8. Pass: Qlik1234
2. Renamed Computer to “qlikserver”
3. Install Sense Enterprise
   1. Quick Install for Central Node
   2. RepositoryPW: Qlik1234
   3. Admin User: QlikAdmin
   4. Apply Internal License with any user: (like Qlik2Go), Organization: (like Qlik)
   5. Apply DataMarket License (same creds)
   6. Allocate License to QlikAdmin

### Sense Configuration

1. Add Windows Users
   1. Password: Qlik1234
   2. Settings UNCHECK - "User must change password at next logon"
   3. 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 |

* 1. Create User Directory Connector
     1. SELECT - Local Network
     2. UNCHECK “Fetch user data on first access, then keep in sync”
     3. RUN this sync
  2. Allocate Tokens to each of these users

1. 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 Peformance, Pipeline and Productivity |
| Workforce Performance and Talent Analytics |

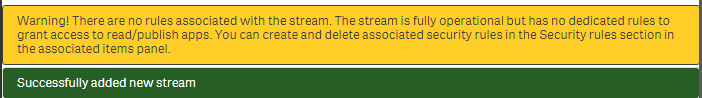
1. Create Custom Property = **QlikGroup**
   1. Resource Types: **Apps, Streams,** **Users**
   2. Values:

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

1. 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 |

1. Create Streams and Assign QlikGroup to it
   1. After hitting Apply the default security rule will pop up – hit CANCEL
   2. You will see a warning that no rule has been created – that’s okay, we will create a generic rule to handle all streams



|  |  |
| --- | --- |
| **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 *\*already exists* | Admin |

1. 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 Peformance, Pipeline and Productivity | Sales and Marketing |  |
| Workforce Performance and Talent Analytics | Human Resources |  |

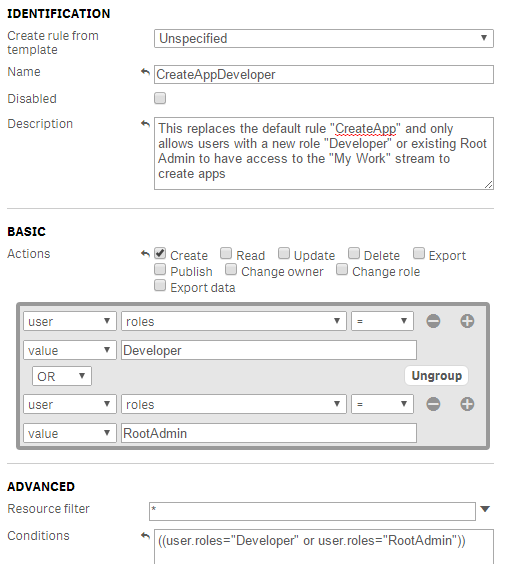
### Sense Configuration (Security)

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

1. 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.
   1. Let’s start by **disabling** (or delete) the default rule for this -> Rule Name =  **CreateApp** so that not ALL users can create apps



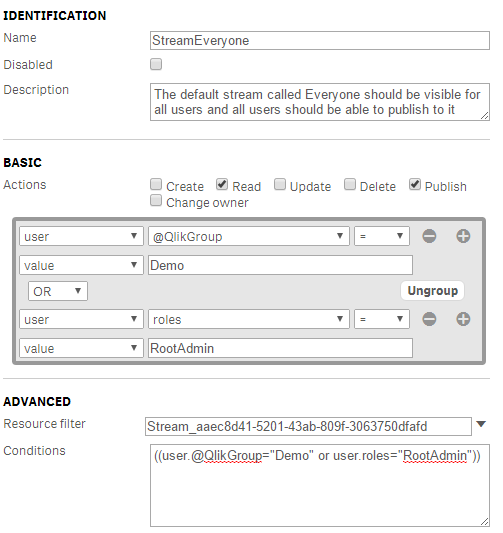
* 1. Second we need to create the rule below (quick note not seen in screen capture, I assign this role to HUB only)
  2. Don’t forget to **assign** this “**Developer**” role to **Arlyn**, **Diane** and **Demo** users AFTER creating the security rule



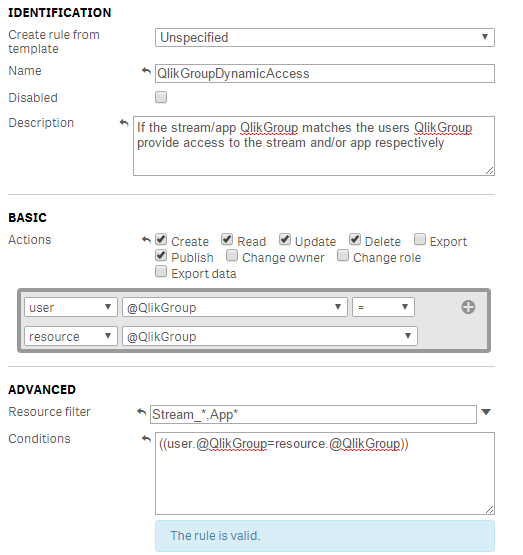
1. We also want to remove access to the “Everyone” stream by default and only open it up for RootAdmin and Demo users
   1. So disable access for anonymous users



* 1. 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)



1. 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.



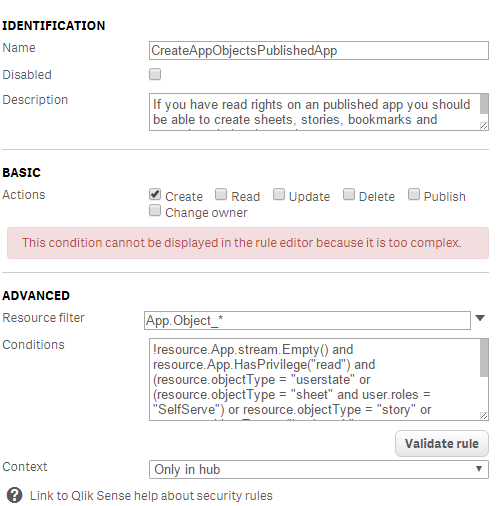
1. In the Hub I would also like to create a Guided Analytics vs Self-Service feel. The difference here will be that a Guided Analytics type of user still gets full access to an app for exploration but cannot modify existing or create new sheets – they CAN however take advantage of collaboration features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

or resource.objectType = "sheet"

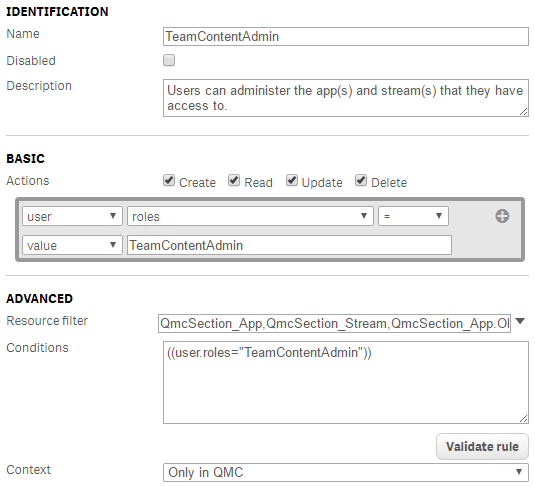
should become

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

* 1. Don’t forget to assign the “**SelfServe**” role to **Eric Johnson** and **Xavier Oleron**

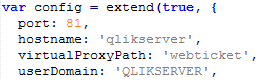


1. This is a rule specifically for QMC section rules. We will provide App, Stream and AppObject section access with a variety of actions where the user has a new role called TeamContentAdmin
   1. First create the rule below
      1. The Resource filters are not menu options but should include the following: **QmcSection\_App,QmcSection\_Stream,QmcSection\_App.Object**
   2. Don’t forget to **assign** this “**TeamContentAdmin**” role to **Arlyn** after creating the security rule



### 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
   1. Extract the contents of brackedemo.zip file anywhere on the machine
   2. Open the folder you just extracted and run “copyFiles.bat”
      1. 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)
   3. Configure PinIt (optional if you don’t configure the virtual proxy as specified below)
      1. Open shortcut link, then navigate to the js folder
      2. In “**require-config.js**” you need to specify the virtual proxy (line 3)
         1. Default configuration for virtual proxy setup below
   4. Configure Demo Interface
      1. Open shortcut link, then navigate to the config folder
      2. In “**config.js**” you need to specify the port, hostname, virtualProxyPath and userDomain
         1. Default configuration follows the setup in this document



* + - * + 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)
  1. 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

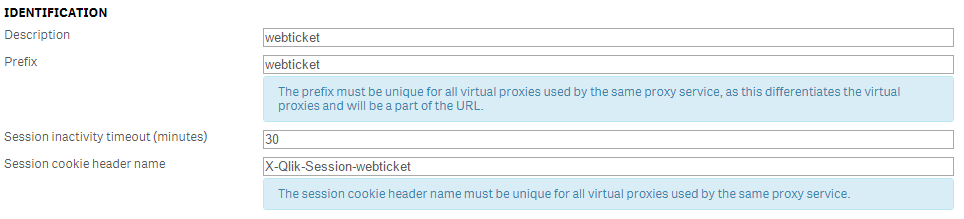
ExecType=nodejs

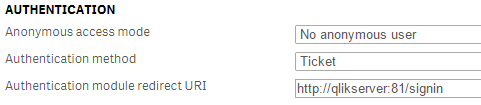
ExePath=Node\node.exe

Script=Node\brackedemo\server.js

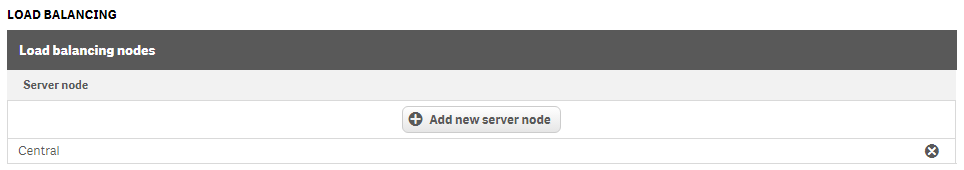
* 1. Finally go to the services console and restart “Qlik Sense Service Dispatcher”

1. Create New Virtual Proxy





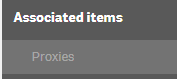
*\*redirect URI should be* [*http://qlikserver:81/signin*](http://qlikserver:81/signin)

******

# 

*\*white list value should be qlikserver*

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



1. Use your favorite browser – my preferences include
   1. set the default website to *http://qlikserver:81/*
   2. set favorite links to include
      1. Qlik Demo Interface = *http://qlikserver:81/*
      2. QMC (Admin) = *http://qlikserver/qmc*
         1. O*n first login enter QlikAdmin + pwd (I saved these values so chrome autofill would remember for me)*
      3. Hub (Admin) = *http://qlikserver/hub*
         1. O*n first login enter QlikAdmin + pwd (I saved these values so chrome autofill would remember for me)*