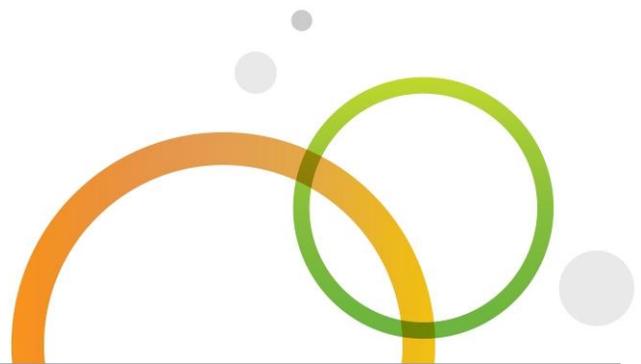# Get Started with Qlik® Sense

Allocating Access Passes

September, 2014

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About this document

This document is designed to help you get started quickly when assigning initial user access passes to the Qlik® Sense platform. It is assumed you have already activated your license with the appropriate number of tokens assigned to it. Information in this document also addresses those that have installed Qlik Sense on a single standalone environment with all default settings. This document also has some important information on the role security and user accounts play in a default out-of-the-box installation. Note that this guide is not meant to replace the Help documentation. For more detailed information on this and other Qlik Sense topics please visit the Qlik Help Site at http://help.qlik.com. This topic can be found by navigating: **Deploying Qlik Sense > Deploying Qlik Sense > Setting up your Qlik Sense site > Managing user access**.

A note about Qlik Sense default local installation security

After installation, the Qlik Sense platform will use the operating system's local security layer to authenticate and retrieve user data that is then stored in the Qlik Sense Repository. This is default behavior until you configure Qlik Sense to use a User Directory Connector, recommended.
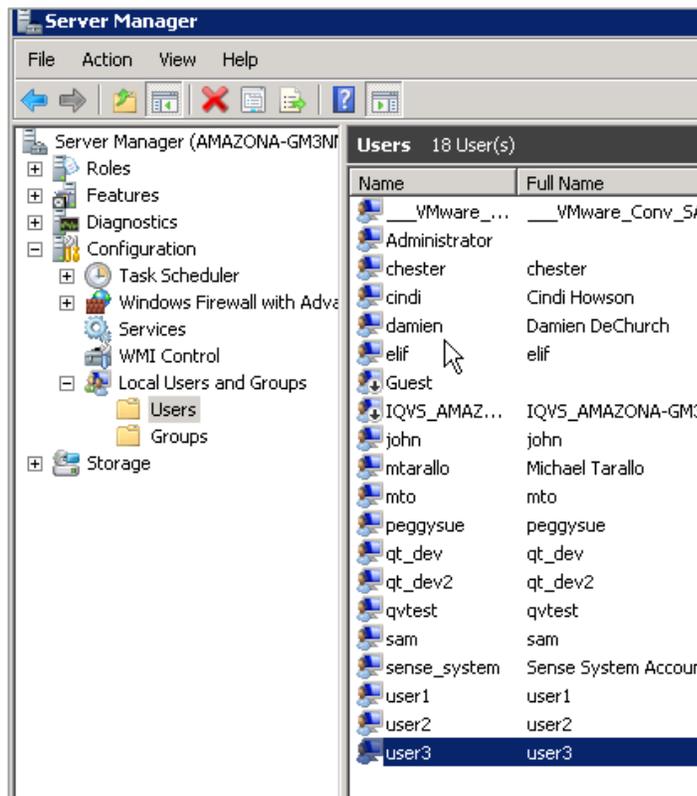
A User Directory Connector can be configured to use another authentication method/provider or directory service such as a Local Network group, Active Directory, LDAP or even custom data access via ODBC. User data can then be synced from those providers into the Qlik® Sense system to then be allocated towards a Qlik Sense access pass. You can learn more here when accessing the Qlik Help site: **Administering Qlik Sense > Managing a Qlik Sense site > Managing QMC resources > Managing users**. For this quick setup, if you want to get the system up quickly, you do not need to configure a User Directory Connector at this moment, just use the local user accounts.

NOTE: There are other options that support custom security authentication through the use http headers, proxies, APIs etc. You can learn more about this n the *Extending Qlik Sense* section of the Qlik Help site.

A note about local user accounts

By default, on a single local installation of the Qlik Sense platform that has NOT been configured with any User Directory Connectors, Qlik Sense can allocate the users already available in the operating system's local security layer. However, they WILL NOT BE listed in the User section of the Qlik Sense Management Console (QMC). The user account used to install the Qlik Sense software (Qlik S*ense_system in our example*) will be the only account in the list along with some other Qlik Sense specific accounts that work with the services.
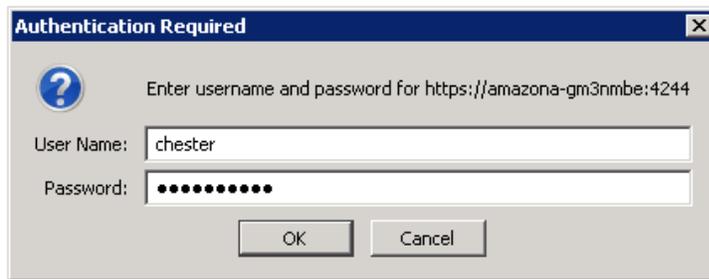
Name		User directory	User ID	Admin roles	Status	Tags
sa_engine	🛈	INTERNAL	sa_engine		OK	
sa_proxy	🛈	INTERNAL	sa_proxy		OK	
sa_repository	🛈	INTERNAL	sa_repository		OK	
sa_scheduler	🛈	INTERNAL	sa_scheduler		OK	
sense_system	🛈	AMAZONA-GM3NMBE	sense_system	RootAdmin	OK	

This default account can then be allocated with a specific Qlik Sense access pass or you may decide to use another account instead of the one used to install the software. If that is the case you can perform this quick trick.

Quick Trick to get local users into Qlik® Sense

This is a quick trick for testing purposes if you have not setup a user Directory Connector and have not synched any users with the system.

Clients that access the Qlik Sense Hub URL and enter in valid local system credentials but have not been assigned access yet to Qlik Sense, are automatically added to the Qlik Sense Repository and can be seen in the Users section in the Qlik Management Console.   If you want some other local accounts that are available in the local operating security to appear in the User list in the QMC so they can be allocated to use Qlik Sense, a quick trick is to access the Hub URL at https://<machine_name>/hub/ enter in a valid user name and password, click OK.

You will be authenticated but receive an error that you do not have an access pass.
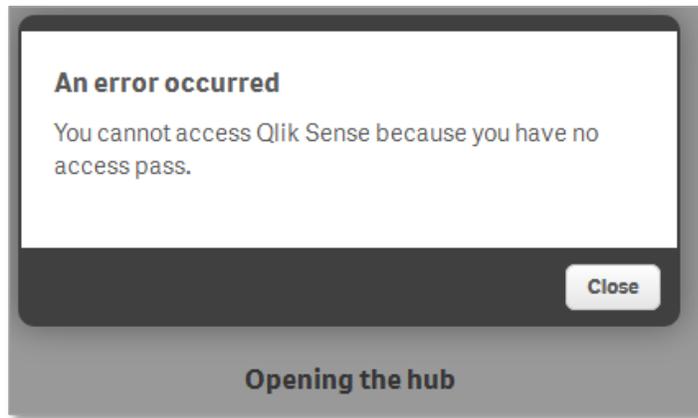
You can then go back to the QMC and under Users; you will see that user that can then be allocated with a User access pass which is for users that will be using the system often.

Name		User directory	User ID	Admin roles	Status	Tags
chester	ℹ	AMAZONA-GM3NMBE	chester		OK	
sa_engine	ℹ	INTERNAL	sa_engine		OK	
sa_proxy	ℹ	INTERNAL	sa_proxy		OK	
sa_repository	ℹ	INTERNAL	sa_repository		OK	
sa_scheduler	ℹ	INTERNAL	sa_scheduler		OK	
sense_system	ℹ	AMAZONA-GM3NMBE	sense_system	RootAdmin	OK	

A note on allocating users in Qlik® Sense

Remember, that YOU DO NOT ADD new users to Qlik Sense. You either create access for existing users via rules (Login Pass) or simply ALLOCATE existing users to Qlik Sense (Login pass). Most likely, many deployments will setup a User Directory Connector (recommended) to retrieve user information from a specific security system to populate the Qlik Sense Repository. User information can be synced between the Repository and the system via a scheduled task. These users will then be available for allocation as well as role assignment authorization. See the Qlik Help Site for more information.

The user account used to install the Qlik Sense platform automatically becomes the *Root Admin* of Qlik Sense environment, providing it with full control. By default it is NOT ALLOCATED to use the online Qlik Sense Hub, to create apps and visualizations. You can choose to allocate this account for testing purposes. You can also choose to revoke the Root Admin privilege on this account and assign another user account with the Root Admin privilege. **For simplicity purposes, we recommend you keep the default user used to install the software for now until you become more familiar with this process.**
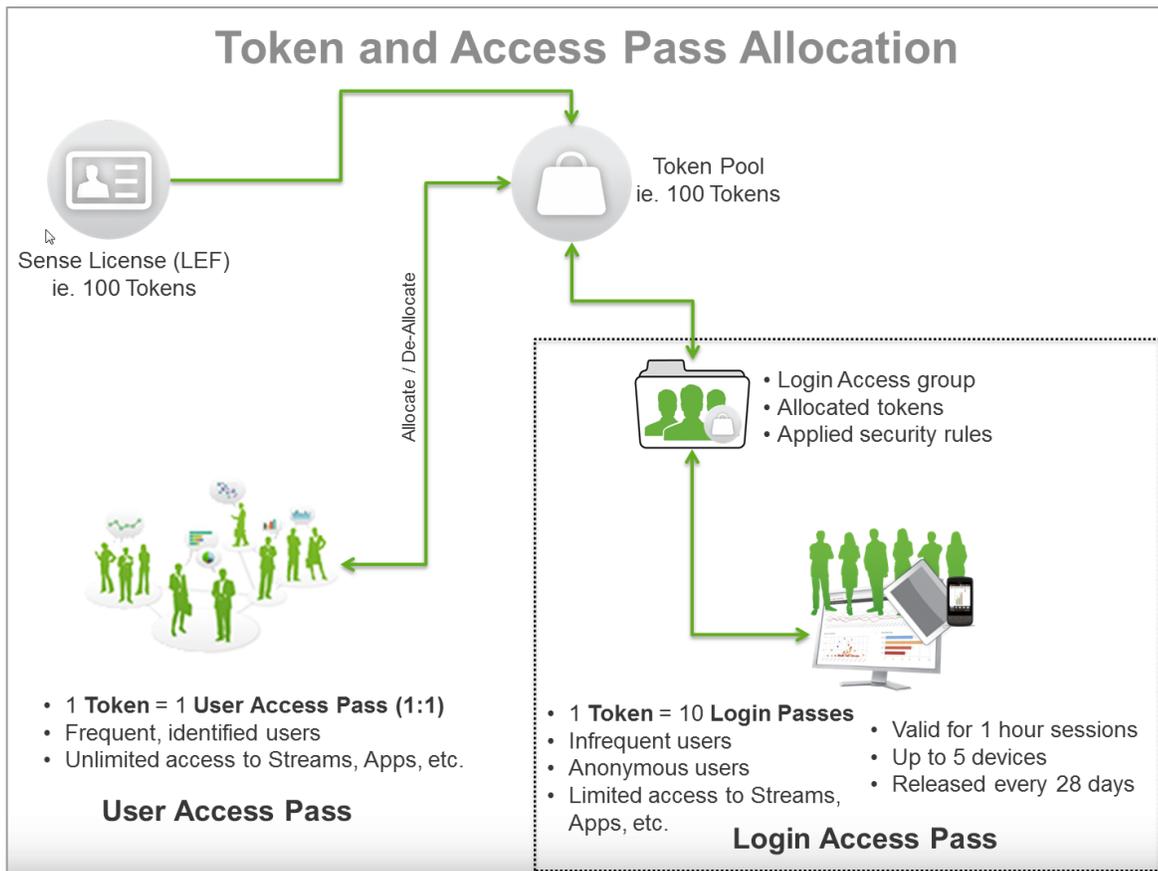
A note about Tokens and Access Passes

Detailed information about tokens and Access Passes can be found in the Qlik Help Site under **Administering Qlik Sense > Managing a Qlik Sense site > Managing QMC resources > Managing license and tokens.** Certain rules apply to assigning access passes so please review them carefully.

Tokens: The License Enabling File (LEF) determines the number of tokens available for a Qlik Sense site. You must activate the Qlik Sense site license to get the tokens. Allocate the tokens to the different access passes to give the users access to the hub and apps.

User access: Think frequent users of the system. You allocate user access to an identified user to allow the user to access the streams and the apps within a Qlik® Sense site. There is a direct relationship between the access type (user access) and the user. By default they have full access to create apps, app objects data connections etc. You can then lock their access privileges down in the user settings and by defining security rules. Each User Access pass will use 1 token. This is the easiest and most common access pass to setup.
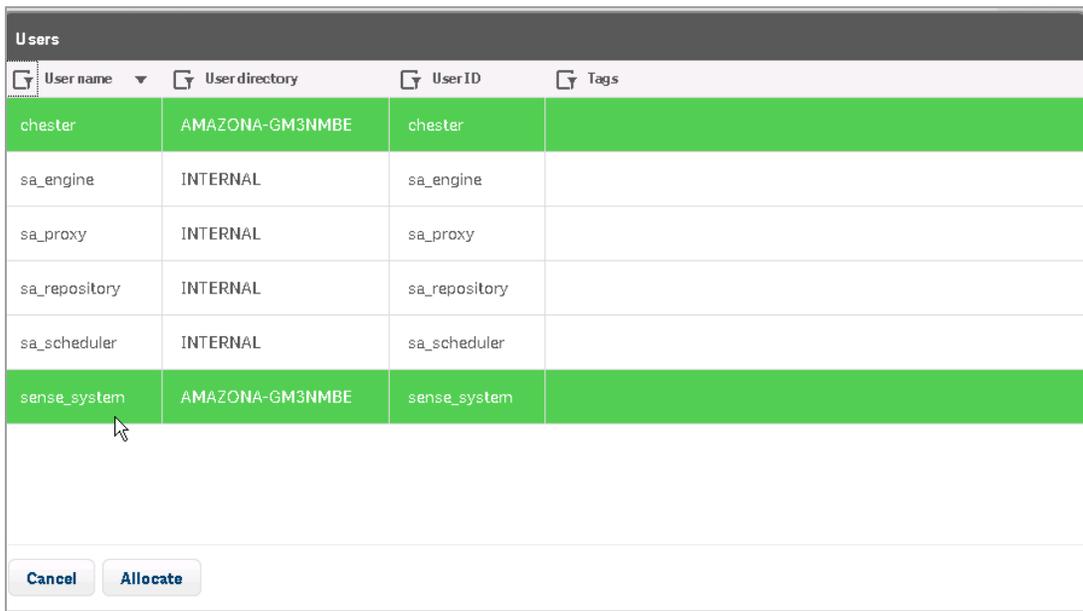
Login access: Think temporary, infrequent users of the system. The login access allows anonymous (if enabled) or infrequent user to access streams and apps for a predefined amount of time. 1 Token is equivalent to 10 Login passes. 1 session per login pass, good for up to 1 hour before another login pass is consumed. – This means that a single user may use several login access passes within a day. You create security rules specifying which users the login access is available for. If it is determined that certain users are consuming multiple Login passes, you might want to consider providing that user with a User access pass instead.
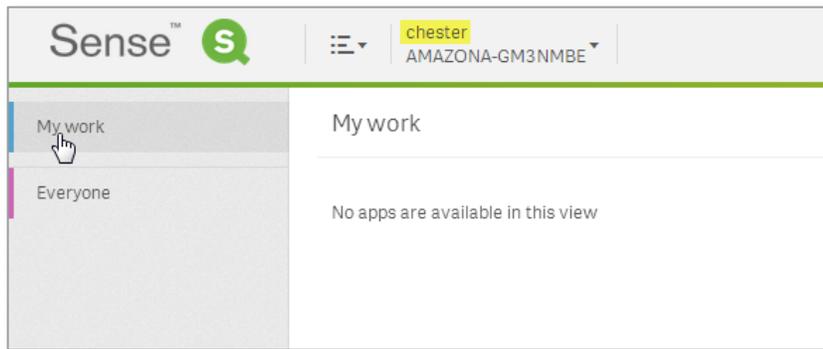

Token and Access Pass Allocation

Sense License (LEF)
ie. 100 Tokens

Token Pool
ie. 100 Tokens

Allocate / De-Allocate

- Login Access group
- Allocated tokens
- Applied security rules

- 1 **Token** = 1 **User Access Pass (1:1)**
- Frequent, identified users
- Unlimited access to Streams, Apps, etc.

User Access Pass

- 1 **Token** = 10 **Login Passes**
- Infrequent users
- Anonymous users
- Limited access to Streams, Apps, etc.

- Valid for 1 hour sessions
- Up to 5 devices
- Released every 28 days

Login Access Pass

Allocating User Access

This is the most simple and straightforward approach to providing named users with access to Qlik Sense.

1. Access the Qlik Management Console (QMC) by using the Window program shortcut or by entering the following URL in a supported browser: https://<sense_machine_address>/qmc/
2. On the home page, select License and Tokens from the menu on the left
3. On the right-hand menu Click User access to display that section
4. Click the Allocate button **⊕ Allocate**
5. Select the default user used to install the software (OR if you attempted the trick listed above to add another local user, select that particular user) (you can multi-select users by holding the CTRL key)
6. Click Allocate

User name	User directory	User ID	Tags
chester	AMAZONA-GM3NMBE	chester	
sa_engine	INTERNAL	sa_engine	
sa_proxy	INTERNAL	sa_proxy	
sa_repository	INTERNAL	sa_repository	
sa_scheduler	INTERNAL	sa_scheduler	
sense_system	AMAZONA-GM3NMBE	sense_system	

Cancel   Allocate

The user(s) will now have access to the hub

Allocating Login Access

A login access pass allows a user in the login access group to access Qlik$^®$ Sense Streams and apps for one hour.

When you create new Login Access passes you set the following:

- The number of tokens you want to allocate for the login group, providing for a number of login access passes

- The license rule specifying which users, groups, elements, etc. the login access is available for

This allows limited temporary Qlik Sense access to groups of users that are in security system, without having to explicitly allocate them individually.
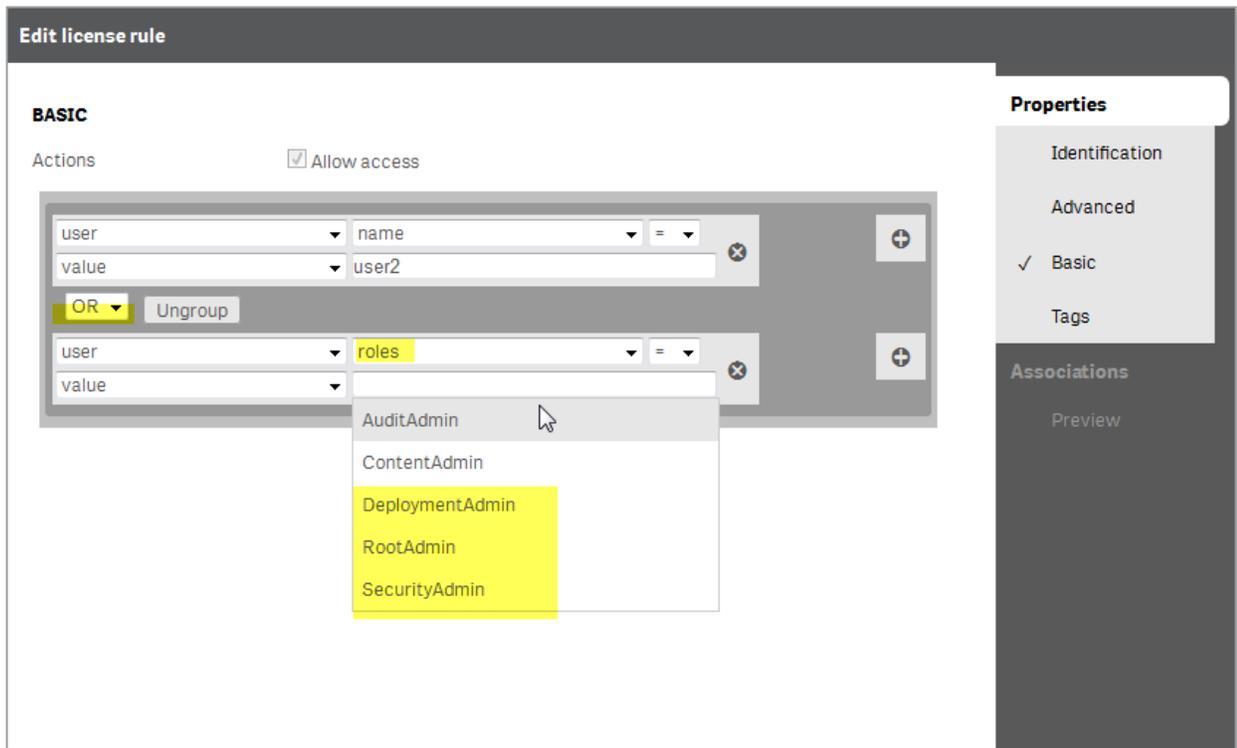
Example: Showing custom license rule that gives access to user2 and a specific role.

1. In the QMC select License and tokens form the Start menu on the menu on the left
2. On the right select Login Access
3. Click Create New (top right corner)
4. Provide a name to identify the login access group
5. Provide a number of tokens for this group
   a. Each login access will use up 10 token

Ex. Up to 100 tokens for this group; 100 tokens = 1000 Login passes

6. In the Create License Rule box you can select a variety of Qlik Sense resource values and operators that create a rule to meet your needs for the Login Access pass. You can also choose to see some advanced options, which will allow you to enter in the rule syntax if desired. Check the Qlik Help Site for more information on this topic.

7. In the Basic actions box, choose "user" from the first select box, in the 2nd, "name", change the 3rd select box from **equal** "=" to **"like"** and the 4th to, "value". In the last text input box enter an asterisk "*". This security rule, will allocate all users in the local operating system security layer to have access to Qlik Sense.

8. Click Apply

9. Login into the hub https://machine_name/hub - use any other ID that you know is available in the operating system. You should have access to the Qlik Sense Hub.
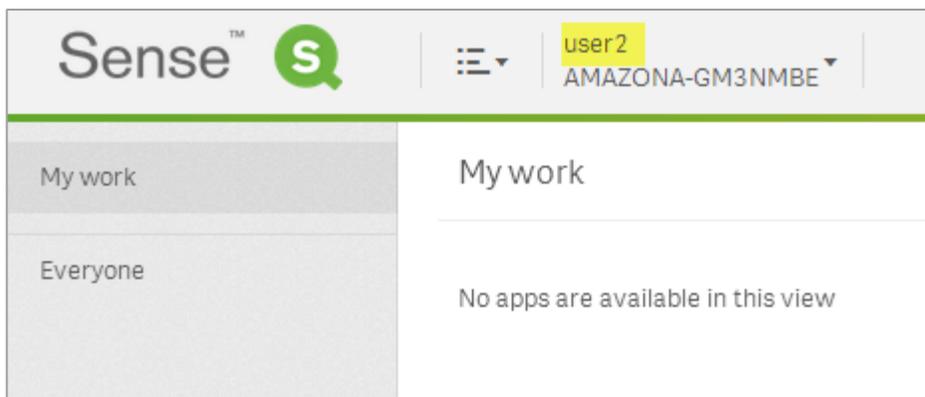
Additional Resources

This concludes the Qlik® Sense Information Guide to Allocating Access Passes. Please refer to the additional resources, tutorials, samples, and videos available on the Qlik Help Site as well as the New to Qlik Sense Forums to learn more.

- http://community.qlik.com/community/new-to-qlik-sense - New to Qlik Sense Forums
- http://help.qlik.com/ - Qlik On-line help site
- https://www.youtube.com/watch?v=zOP1880hTRg – Token Licensing Assigning Access Passes (video)