

Cloudpath Enrollment System Sponsored Guest Access Configuration Guide, 5.9R4

Supporting Cloudpath Software Release 5.9R4

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Overview

Audience: This manual is intended for both the Cloudpath administrator and Cloudpath users who have been designated as sponsors by the Cloudpath administrator.

NOTE

This manual pertains only to the use of vouchers provided by sponsors to guest users. For information about using sponsors to provide online or offline network access with the use of *verification codes* (which is a different process from using vouchers), refer to the *Cloudpath Enrollment System Deployment Administration Guide*.

NOTE

This manual also pertains specifically to the workflow plugin called "Authenticate using a voucher from a sponsor." There is, however, one other type of enrollment process that uses voucher lists. That plugin is called "Perform out-of-band verification."

Sponsored guest access allows authorized employees to grant network access to third-parties. This is most commonly used to provide secure wireless network access to corporate visitors and partners, and is typically time-restricted. By distributing authorization to employees, third-parties are able to quickly gain access without IT involvement and with appropriate traceability.

The method for providing access is through the use of vouchers that sponsors provide to their guest users.

The following steps show the process to set up sponsored-guest access:

1. During the setup of the Cloudpath Enrollment System, the Cloudpath administrator specifies that visitors may gain network access if they are sponsored. The network administrator can specify that anyone belonging to the Wireless Sponsors group (an example name of a group you can create within Active Directory) is allowed to sponsor a guest. This type of sponsor is called an "external sponsor." For instructions, refer to [Authentication Server Configuration for Sponsorship](#) on page 5. ("Onboard sponsors" can also be added, as described below.)
2. The Cloudpath administrator should configure a workflow that uses the plugin called "Authenticate using a voucher from a sponsor." For instructions, refer to [Creating a Workflow to Prompt User for Voucher](#) on page 6.
3. The Cloudpath administrator can use the **Managed Access > Sponsored Access** portion of the Cloudpath UI to add "onboard sponsors" to a voucher list that was created when the workflow was created. For information on adding sponsors, refer to [Adding Sponsors to a Voucher List](#) on page 10.
4. Sponsors can prepare ahead of time for their guests by creating vouchers via the sponsorship portal. This is described in [Enrollment Experience for Sponsor and Guest User](#) on page 14.

Additional Information:

- For complete information about how sponsors can use the sponsorship portal, refer to [Using the Sponsorship Portal](#) on page 18.
- For complete information about using the Cloudpath UI to create voucher lists and vouchers, refer to [Creating Voucher Lists and Vouchers in the Cloudpath UI](#) on page 25.

NOTE

Voucher lists can be created only in the Cloudpath UI, not in the sponsorship portal. However, vouchers can be added to voucher lists either from the Cloudpath UI or the sponsorship portal.

Authentication Server Configuration for Sponsorship

This task is needed if you want to allow "external sponsors" (which are sponsors that you do not need to add via the **Managed Access > Sponsored Access** portion of the Cloudpath UI) to be able to generate vouchers. To configure the sponsored access feature for external sponsors, the Cloudpath administrator must set up a sponsor group in the Corporate AD or LDAP server for employees that can be authorized as sponsors. For example, create a group named **Manager** or **Wireless Sponsors**.

NOTE

For information about adding sponsors via the **Managed Access > Sponsored Access** portion of the Cloudpath UI, refer to [How to Add Onboard Sponsors](#) on page 11.

This group name is used in Cloudpath when configuring which users are able to log into the sponsorship portal and sponsor guest users. To set up your Active Directory or LDAP server to support sponsorship, follow these steps:

1. From the ES Admin UI, go to **Configuration > Authentication Servers**.

2. On the **Authentication Servers** page, edit the AD or LDAP server you will be using to authenticate sponsors and guest users.

FIGURE 1 Configure AD Server for Sponsorship Logins

Add Authentication Server < Back Next >

Connect to Active Directory
Select this option to enable end-users to authenticate via Active Directory.

Default AD Domain:

AD Host: *

AD DN: *

AD Username Attribute:

Verify Account Status On Each Authentication

Perform Status Check:

Additional Logins

Use For Admin Logins:

Use For Sponsor Logins:

Test Authentication

Run Authentication Test?

Connect to LDAP
Select this option to enable end-users to authenticate via LDAP (or LDAPs).

Connect to RADIUS
Select this option to enable end-users to authenticate via RADIUS using PAP.

3. Select the **User For Sponsor Logins** box to allow sponsors to log into the sponsorship portal using credentials from this authentication server.

Creating a Workflow to Prompt User for Voucher

This section describes how to add a step in the enrollment workflow to prompt a guest user for a voucher or one-time password. Use this configuration if you plan to use generated voucher lists.

1. From the ES Admin UI, go to **Configuration > Workflows** and create an enrollment workflow for guest users.

2. Add an enrollment step that prompts guest users to **Authenticate using a voucher from a sponsor** by clicking on the button of that name:

FIGURE 2 List of Plugin Buttons

Which Type Of Step Should Be Added?

Display an Acceptable Use Policy (AUP)
 Displays a message to the user and requires that they signal their acceptance. This is normally used for an acceptable use policy (AUP) or end-user license agreement (EULA).

Authenticate to a traditional authentication server
 Prompts the user to authenticate to an Active Directory server, and LDAP server, RADIUS or a SAML server.

Ask the user to name their device
 Prompts the user to provide a name for the device, with the option to reuse or delete previously enrolled devices. This may suggest that old devices be removed or may limit the maximum number of concurrent devices.

Ask the user about concurrent certificates
 Prompts the user with information about previously issued certificates that are still valid. This may suggest that old certificates be removed or may limit the maximum number of concurrent certificates.

Split users into different branches
 Creates a branch or fork in the enrollment process. This can occur (1) visually by having the user make a selection or (2) it can occur automatically based on criteria associated with each option. For example, a user that selects "Guest" may be sent through a different process than a user that selects to enroll as an "Employee". Likewise, an Android device may be presented a different enrollment sequence than a Windows device.

Authenticate to a third-party
 Prompts the user to authenticate via a variety of third-party sources. This includes internal OAuth servers as well as public OAuth servers, such as Facebook, LinkedIn, and Google.

Authenticate using a voucher from a sponsor
 Prompts the user to enter a voucher previously received from a sponsor. The sponsor generates the voucher via the Sponsor Portal, typically before the user arrives onsite.

4. The **Sponsorship** section applies only if you are allowing external sponsors. Enter the appropriate information in the following fields:

- **Format** - In addition to defining the voucher format, determine if you want to enable **Require Username Match**.

NOTE

Require Username Match means that the user must authenticate with a username that matches the name specified in the voucher provided by the sponsor. This allows the voucher to be locked to a particular user.

- **LDAP Group Regex** - Defines with groups within LDAP are allowed to be sponsors. For example, if you enter **Wireless Sponsors**, this means that anyone in the **Wireless Sponsors AD** group can sponsor a guest user. **LDAP Username** defines which usernames within LDAP are allowed to be sponsors; **LDAP Username DN** defines with username DNs are allowed to be sponsors.
- **Maximum Certificates** - Maximum number of vouchers that a sponsor is allowed to create and allocate for a particular voucher list.
- **Default Permissions** - The permissions to be used for sponsors authenticated using the **Sponsorship AD Group Regex**.
 - **Add/Edit/Delete Sponsors In Group** - If checked, the sponsor can add, edit, and delete other sponsors within the group.
 - **Manage Devices Enrolled By Sponsor** - If checked, the sponsor can review and revoke devices enrolled via vouchers issued by that sponsor.
 - **Manage Devices Enrolled By All** - If checked, the sponsor can review and revoke devices enrolled via vouchers issued by any sponsor (within the Voucher List).
- **New Sponsor Email Subject** - When a new sponsor is added, an email is sent to the sponsor with this subject.
- **New Sponsor Email Template** - When a new sponsor is added, an email is sent to the sponsor with this message.

5. In the **Fields Displayed to Sponsor** section, select **Do not show**, **Show**, or **Show and require entry** to specify the information to be shown when a sponsor creates a voucher list for guest access.

NOTE

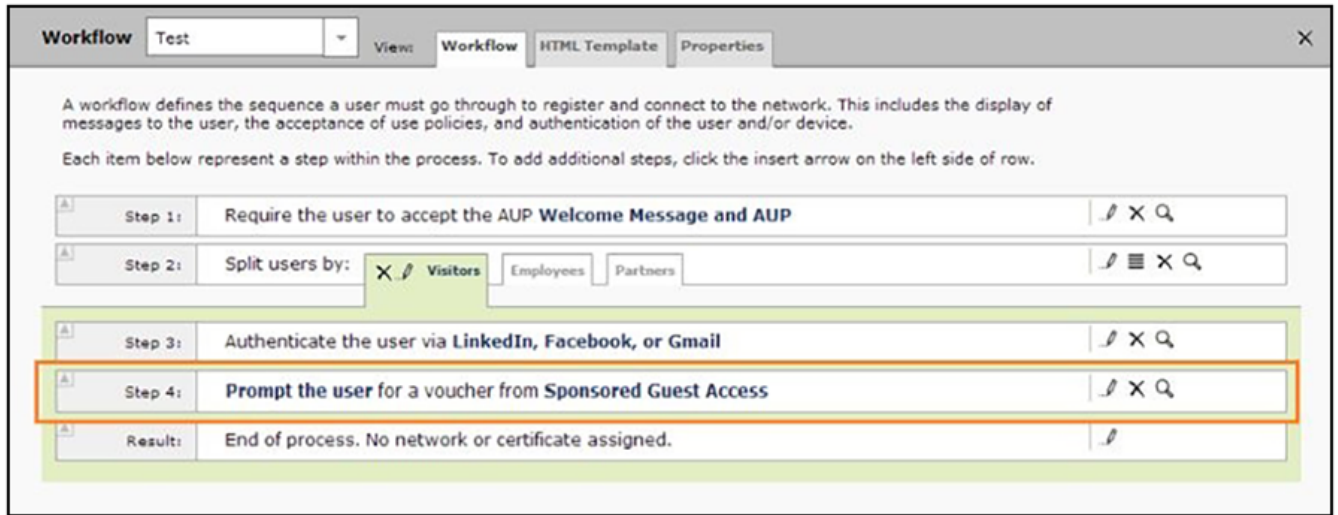
If a field is listed as **Do Not Show**, that field does not appear in the voucher list.

6. If needed, create one or more **Initial vouchers**.

Adding Sponsors to a Voucher List

7. Enter additional configuration, including creating a webpage that prompts the user to enter their voucher, and click **Save**. The voucher prompt is saved in the workflow.

FIGURE 4 Cloudpath Workflow



NOTE

Sponsored access can be combined with additional options, such as authentication via Facebook, LinkedIn, or Google. When combined, the social media provides the authentication while the voucher provides the authorization. This method provides additional identity information and reduces the risk of the voucher being intercepted or misused.

Adding Sponsors to a Voucher List

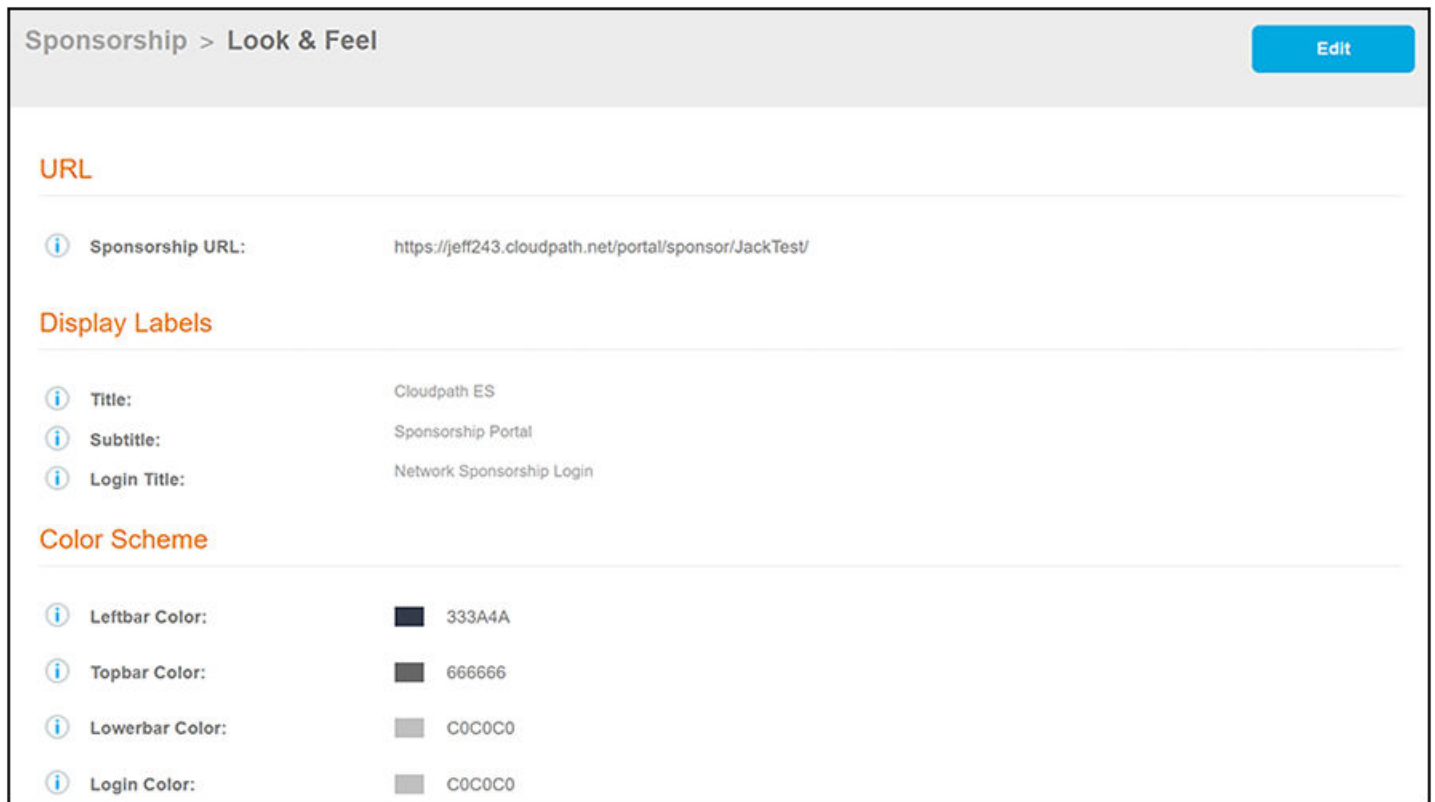
Administrators can add sponsors to a voucher list. Sponsors can create vouchers and invite guest users to join the secure network.

Cloudpath supports Onboard and External sponsors. Onboard sponsors are created locally on the ES Admin UI. External sponsors can log into the Sponsorship Portal if they match a username or group name specified in the Authentication server.

Providing Sponsorship URL to Sponsors:

As Cloudpath administrator, be sure to provide the URL of the sponsorship portal to the sponsors. The the portal can be found in the Cloudpath UI by going to **Managed Access > Sponsored Access > Portal Look & Feel** tab.

FIGURE 5 Sponsorship Look and Feel Page - Sponsorship URL



How to Add Onboard Sponsors

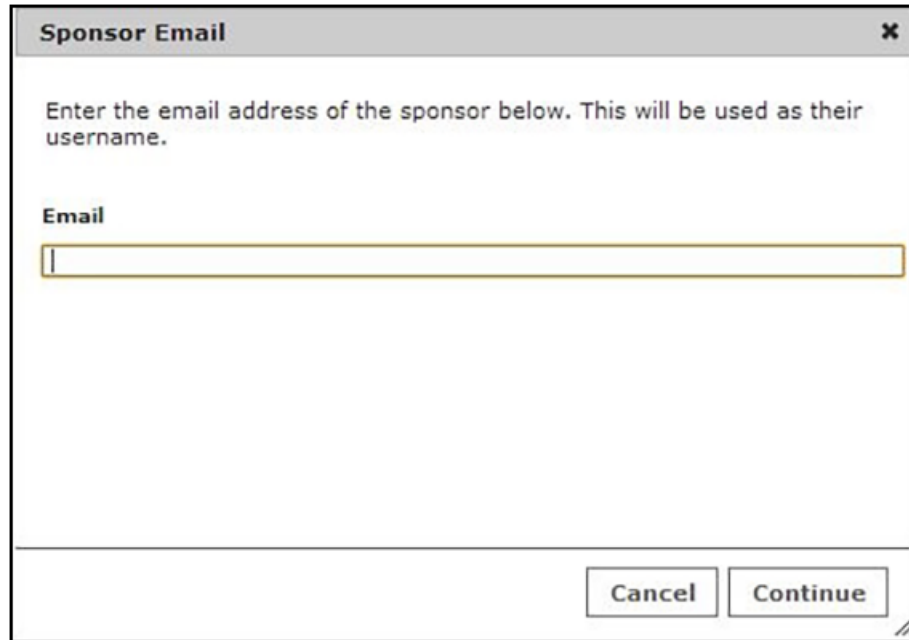
An onboard sponsor is created locally on the Cloudpath voucher list.

1. From the Cloudpath Admin UI, go to **Managed Access > Sponsored Access >**, then click the wrench icon for the list you want.
2. Click the **Sponsors** tab.

Adding Sponsors to a Voucher List
How to Add Onboard Sponsors

3. Click **Add Sponsor** to invoke the Sponsor Email screen.

FIGURE 6 Sponsor Email



The image shows a dialog box titled "Sponsor Email" with a close button (X) in the top right corner. The main text inside the dialog reads: "Enter the email address of the sponsor below. This will be used as their username." Below this text is a label "Email" followed by a single-line text input field. At the bottom right of the dialog, there are two buttons: "Cancel" and "Continue".

4. Enter the email address of the sponsor for this voucher list and click **Continue**. The email address becomes their **Name**.

FIGURE 7 Create Sponsor

Sponsorship > Vouchers > Modify Sponsor

Sponsor Information

Display Name: Test User

Description:

Enabled:

API ID: Sponsor-5A0F17FF-276B-4BDD-8050-D4BBC2048E52

Login Information

Email: sponsor@company.net

Password:

Permissions

Permissions

- Add/Edit/Delete Sponsors In Group
- Manage Devices Enrolled By Sponsor
- Manage Devices Enrolled By All
- Allow Creation by File Upload
- Allow Bulk Creation

5. On the **Create Sponsor** screen, enter the sponsor **Name**, **Description**, and **Enable** the sponsor.
6. In the **Login Information** section, enter the sponsor's **Email** address and **Password**.

NOTE

The sponsor is prompted to change their password during the first login.

7. In the **Permissions** section, check the box for the appropriate sponsor permissions.
 - **Add/Edit/Delete Sponsors In Group** - If checked, the sponsor can add, edit, and delete other sponsors within the group.
 - **Manage Devices Enrolled By Sponsor** - If checked, the sponsor can review and revoke devices enrolled via vouchers issued by that sponsor.
 - **Manage Devices Enrolled By All** - If checked, the sponsor can review and revoke devices enrolled via vouchers issued by any sponsor (within the Voucher List).
 - **Allow Creation by File Upload** - If checked, the sponsor can create multiple vouchers at the same time through a file upload.
 - **Allow Bulk Creation** - If checked, the sponsor can create vouchers in bulk by importing a spreadsheet of vouchers. A default template is provided.

8. Save the sponsor information.

NOTE

The sponsor will receive a notification, such as the following email, when they have been designated as a sponsor.

You have been setup as a sponsor. To login as a sponsor, use the information below.

```
URL: https://jeff245.cloudpath.net/portal/sponsor/JackTest/  
Username: jeff@commscope.com  
Password: test
```

On your first login, you will be prompted to change your password.

External Sponsors

An external sponsor uses AD or LDAP credentials to log into the Sponsorship Portal. An external sponsor can create voucher, invite users to join the secure network, and if the voucher list permissions allow, they can manage other sponsors and enrolled devices. To set up sponsor permissions for a voucher list, see [Adding Sponsors to a Voucher List](#) on page 10 .

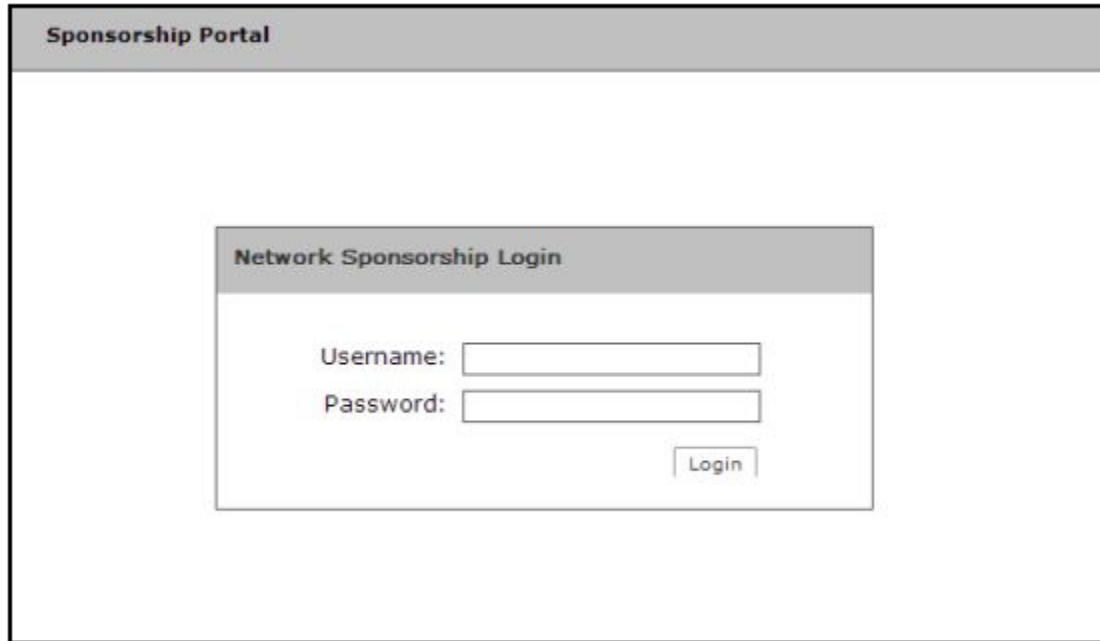
If you want to allow sponsors to log in to the Sponsorship Portal using AD or LDAP credentials, the authentication server must be configured with the specified username or group name filter. To configure group filters for an authentication server, see "[Authentication Server Configuration for Sponsorship](#)" on page 5.

Enrollment Experience for Sponsor and Guest User

This topic describes a typical sequence for how the sponsored-guest access process is intended to work.

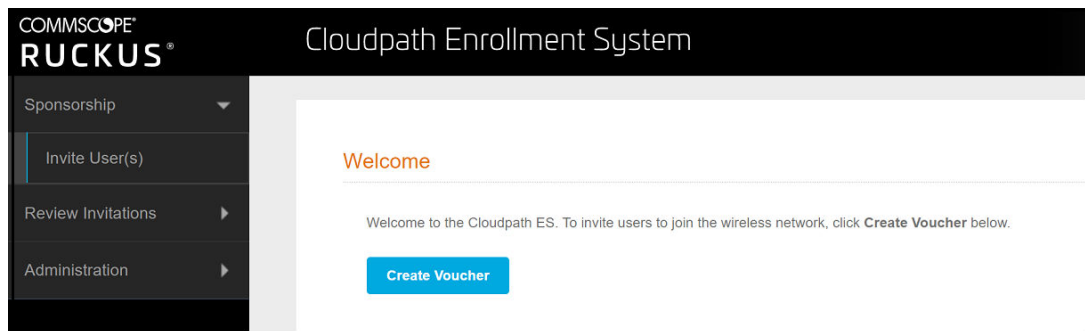
1. When a visitor arrives, the employee sponsor checks the visitor in.
2. The sponsor now enters the sponsorship URL (provided by the Cloudpath system administrator) in their browser. Alternatively, the sponsor can perform the steps that are described here before the guest arrives.
3. After going to the sponsorship URL, the sponsor is presented with the login screen:

FIGURE 8 Sponsorship Portal Login Page



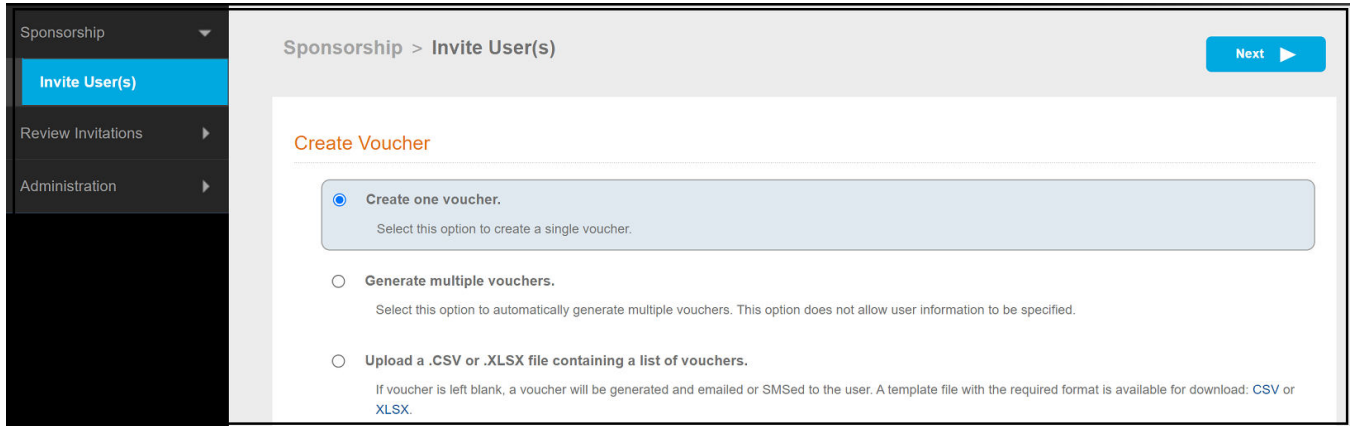
4. After sponsor credentials are checked and validated, the sponsorship portal **Welcome page** appears.

FIGURE 9 Sponsorship Portal Welcome Page



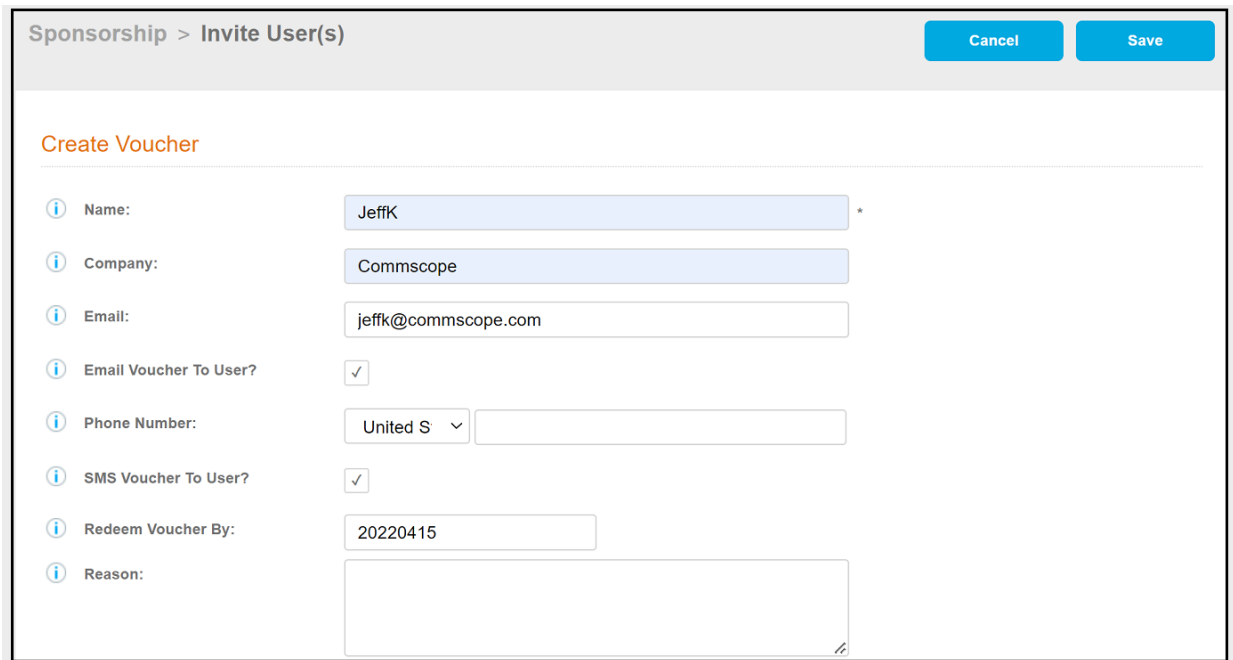
5. Click **Create Voucher**.
6. Follow the prompts until you get to the screen where you have different options, depending on the permissions given to you by the Cloudpath administrator, to create vouchers.

FIGURE 10 Create Voucher Options in Sponsorship Portal



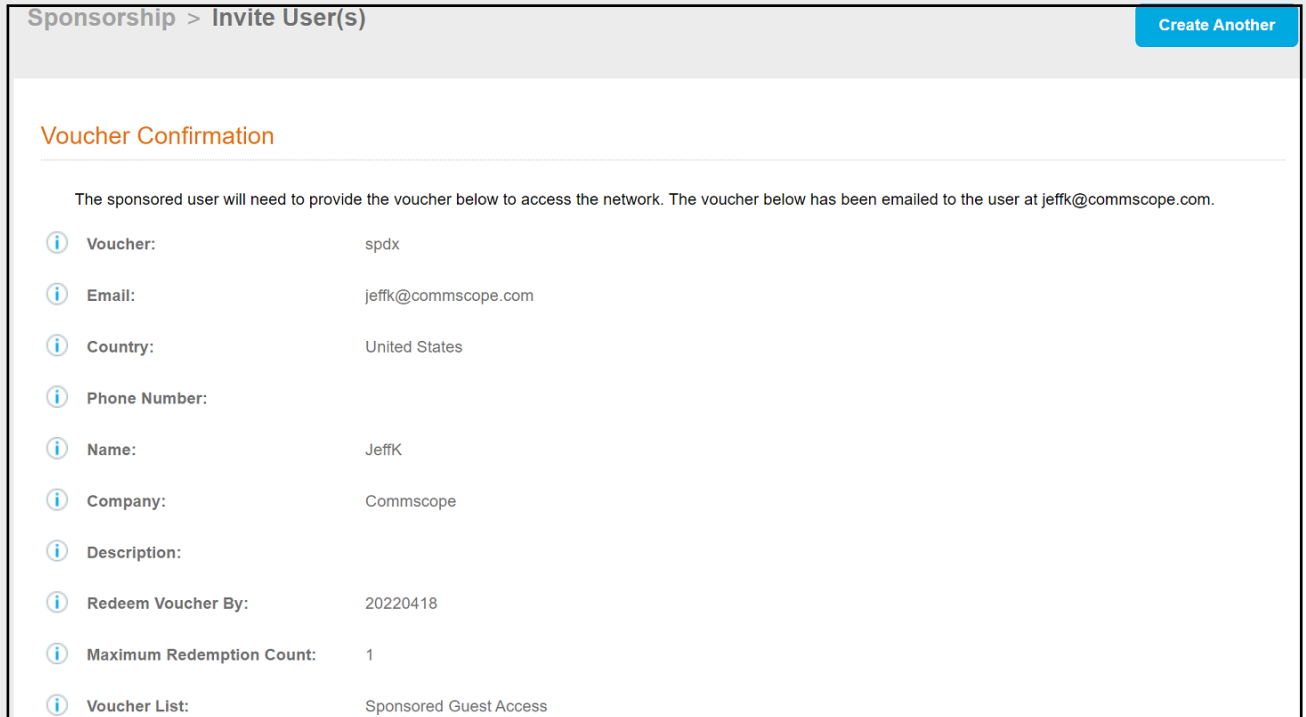
7. With the **Create one voucher** button selected (for this example), click **Next**.
8. Configure the information in this screen, as shown in the example below, then click **Save**.

FIGURE 11 Create Voucher Screen in Sponsorship Portal



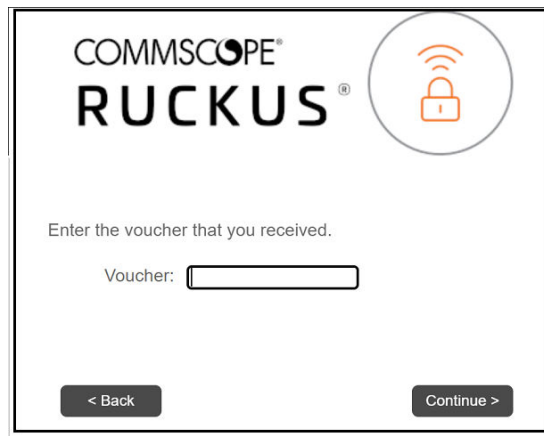
9. A voucher is generated, and appears in the ensuing voucher confirmation screen (shown below).

FIGURE 12 Voucher Confirmation Screen



10. This same voucher code is sent to the guest user, which they will receive either by email, text, or both, depending on how the delivery method has been configured. Another option is that the sponsor can manually provide the voucher to the guest.
11. The sponsor then directs the user to access the onboarding wireless network, at which time the user gets redirected to the Cloudpath system, and then follows the enrollment prompts to obtain network access.
12. When prompted to enter the voucher (see screen below), the guest enters the provided voucher, then continues the enrollment process. When enrollment completes, the guest will be onboarded to the secure Cloudpath network.

FIGURE 13 Voucher Screen for Enrolling Guest User



Using the Sponsorship Portal

From the sponsorship portal, a sponsor can invite guest users to join the network by creating one or multiple vouchers, view outstanding, consumed, expired, and revoked vouchers, and manage devices, and sponsor accounts in your AD or LDAP group.

Use the Sponsorship Portal if guests access is managed using voucher lists.

NOTE

Only sponsors with manage permissions can manage sponsor accounts in the AD or LDAP group. Sponsor permissions are set per voucher list. See “[Adding Sponsors to a Voucher List](#) on page 10.

How to Customize the Sponsorship Portal

You can customize the labeling, images, and colors for the sponsorship portal.

1. From the ES Admin UI, go to **Managed Access > Sponsored Access > Look & Feel** tab. The sponsorship portal **System Setup** page displays the titles and colors for the sponsorship portal.
2. Click **Edit** to customize the sponsorship portal.

FIGURE 14 Customize Sponsorship Portal

The screenshot shows the 'Sponsorship Portal' configuration window. It has a title bar with 'Cancel' and 'Save' buttons. The main content is organized into sections:

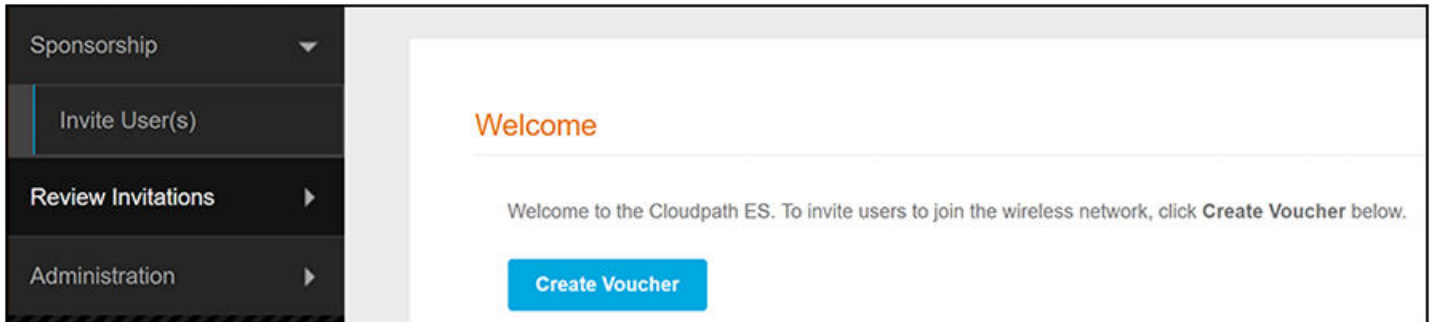
- Page Source:** A dropdown menu set to 'Standard Template'.
- Title:** A text input field containing 'XpressConnect Enrollment System'.
- Subtitle:** A text input field containing 'Sponsorship Portal'.
- Welcome Message:** A text area containing the text: 'Welcome to the XpressConnect Enrollment System. To invite users to join the wireless network, click Create Voucher above.'
- Look & Feel:** A section with five color selection controls, each with a 'Reset' and 'Default' link:
 - Login Title:** Text input field containing 'Network Sponsorship Login'.
 - Leftbar Color:** Color picker showing '333A4A'.
 - Topbar Color:** Color picker showing '666666'.
 - Lowerbar Color:** Color picker showing 'C0C0C0'.
 - Login Color:** Color picker showing 'C0C0C0'.
- Logo File:** A section with a text box containing the instruction: 'The logo file to use in the upper-left corner. The image size should be 180 x 84 pixels.' Below it is a 'Logo File:' label and a 'Choose File' button, with the text 'No file chosen' to the right.

3. Modify titles and colors as needed.
4. To import a customized logo file to display in the upper-left corner of the sponsorship portal, the image size should be 180 x 84 pixels.
5. **Save** the customizations.

Tasks That Sponsors Can Perform On Sponsorship Portal

The Sponsorship Portal UI menu is shown below:

FIGURE 15 Sponsorship Portal Left Menu



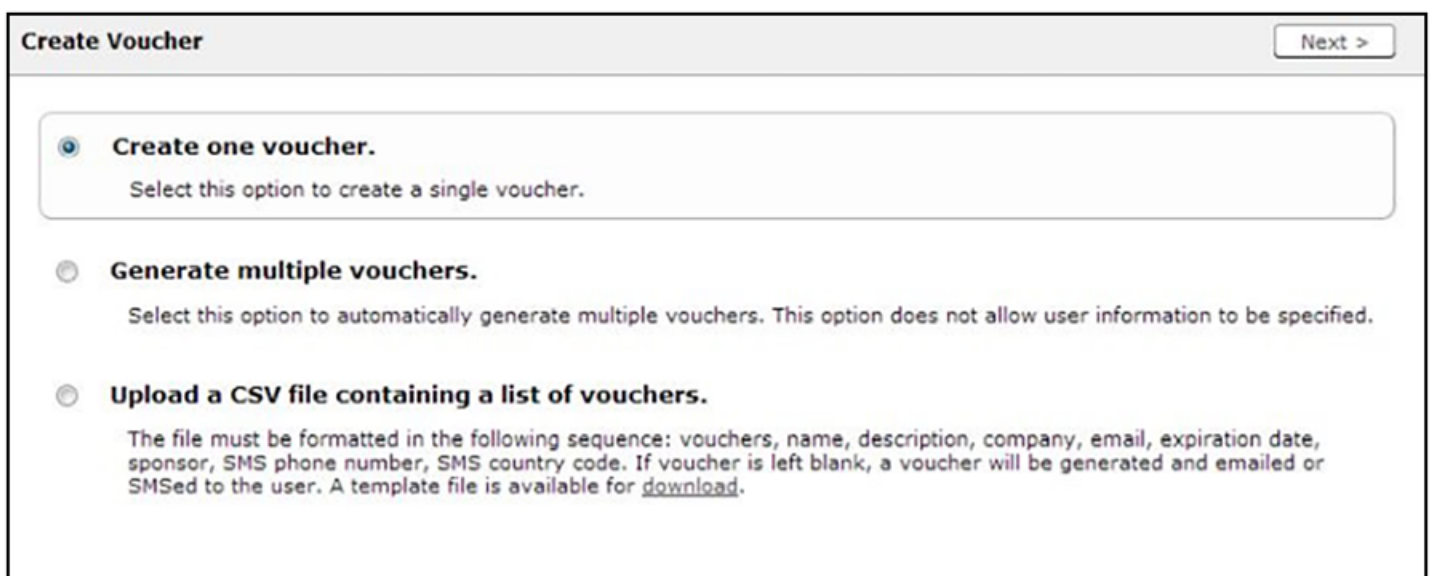
- **Sponsorship tab**
 - **Invite User** - Allows sponsors to create a new voucher that will enable a guest user to enroll a device.
 - **Review Invitations** - Allows sponsors to view outstanding, consumed, expired, and revoked invitations.
- **Administration tab**
 - **Sponsors** - If permissions allow, sponsors can add, change, or remove other sponsors.

Managing Vouchers from the Sponsorship Portal

Sponsors can manage voucher lists and sponsored guest access invitations from the sponsorship portal.

From the Sponsorship UI, select **Invite Users**. The **Create Voucher** page opens.

FIGURE 16 Create Voucher Selection Page



Using the Sponsorship Portal

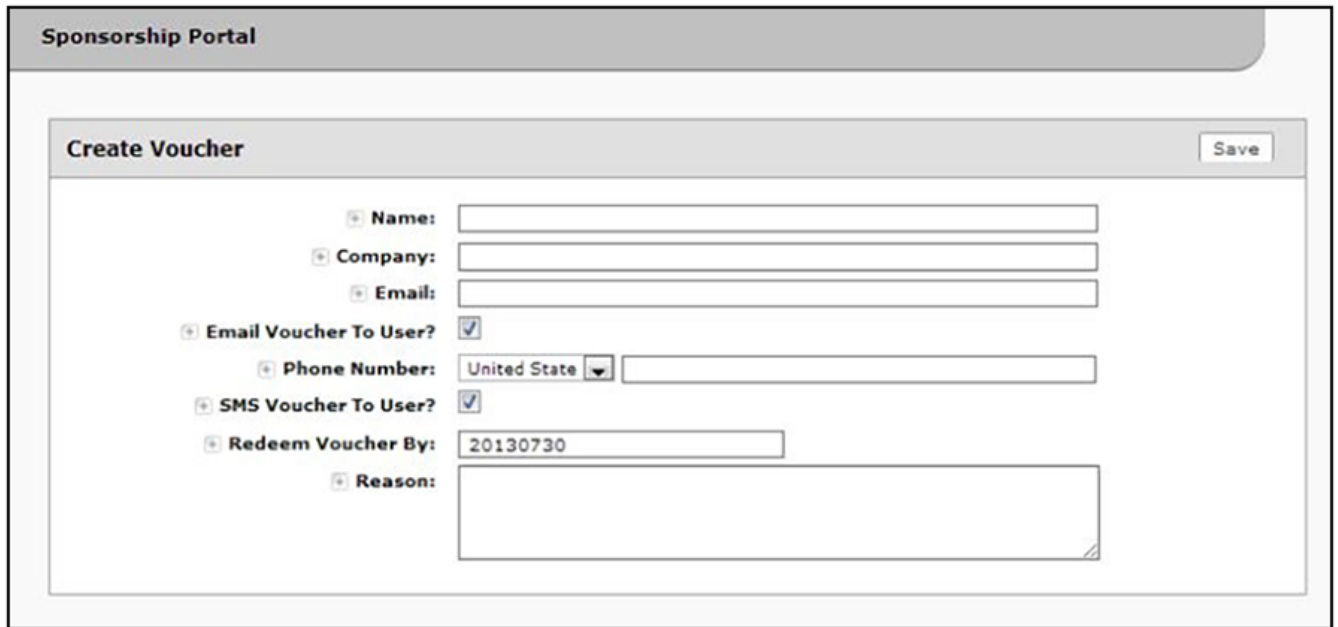
Managing Vouchers from the Sponsorship Portal

You can create a single voucher, allow ES to generate multiple vouchers, or upload a list of vouchers from a CSV file.

How to Create a Single Voucher

1. On the **Create Vouchers** page, select **Create one voucher**.

FIGURE 17 Sponsorship Portal - Create Voucher



The screenshot shows the 'Sponsorship Portal' interface with a 'Create Voucher' form. The form includes the following fields and options:

- Name:** Text input field.
- Company:** Text input field.
- Email:** Text input field.
- Email Voucher To User?** Checkmark (checked).
- Phone Number:** Text input field with a dropdown menu set to 'United State'.
- SMS Voucher To User?** Checkmark (checked).
- Redeem Voucher By:** Text input field containing '20130730'.
- Reason:** Large text area for notes.

A 'Save' button is located in the top right corner of the form area.

2. Enter the guest user information and **Save**.

- **Name** - Guest user name.

NOTE

If **Require Username Match** has been specified in the voucher list, the guest must authenticate with a username that matches the name specified in the voucher provided by the sponsor. This allows the voucher to be locked to a particular user.

- **Company** - Guest user company.
- **Email** - Guest user email address.
- **Email Voucher to User?** - Checked by default. If checked and Email is entered, a voucher is sent to guest user by email.
- **Phone Number** - Select country and enter guest user phone number.
- **SMS Voucher to User?** - Checked by default. If checked and Phone Number is entered, a voucher is sent to guest user by SMS.

NOTE

Voucher notifications sent by Email or SMS are stored on the **Notifications** tab on the ES Admin UI Dashboard.

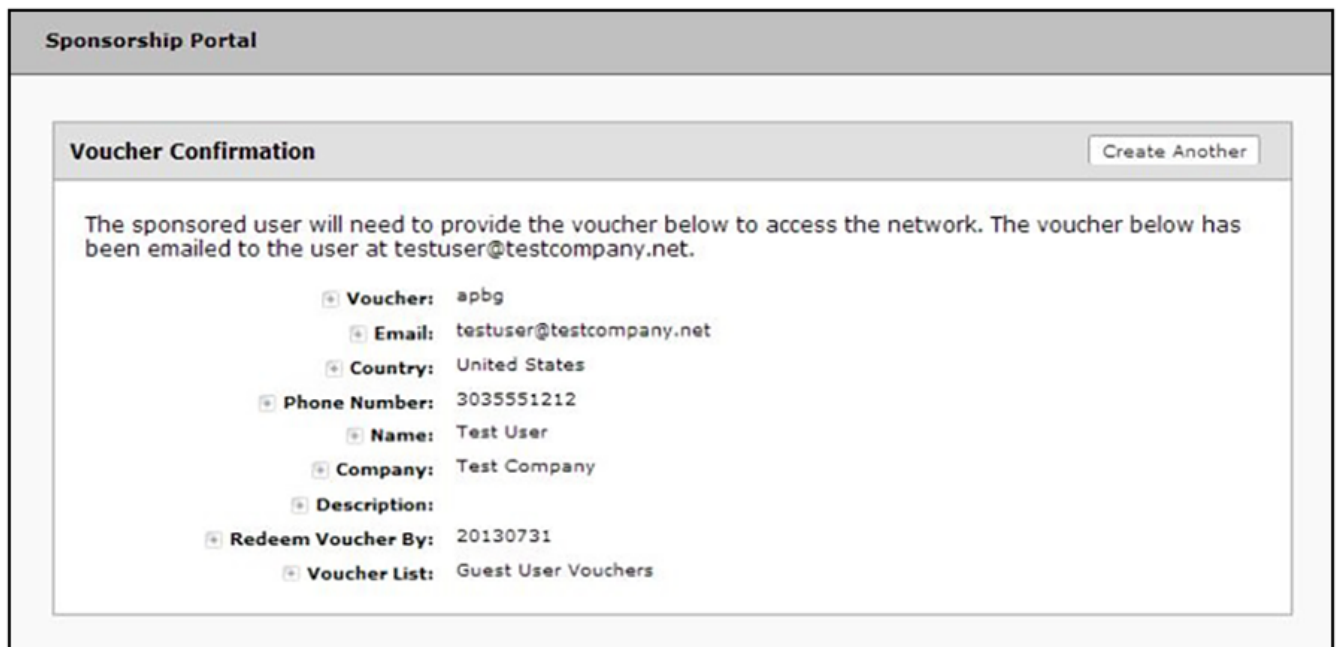
- **Redeem Voucher By** - The date after which the voucher may no longer be redeemed.
- **Reason** - The reason the guest user is provided access.

NOTE

When you create a single voucher, a voucher is automatically generated according to the format specified when you created the voucher list. See [Creating a Workflow to Prompt User for Voucher](#) on page 6.

Details are displayed on the **Voucher Confirmation** page.

FIGURE 18 Voucher Confirmation

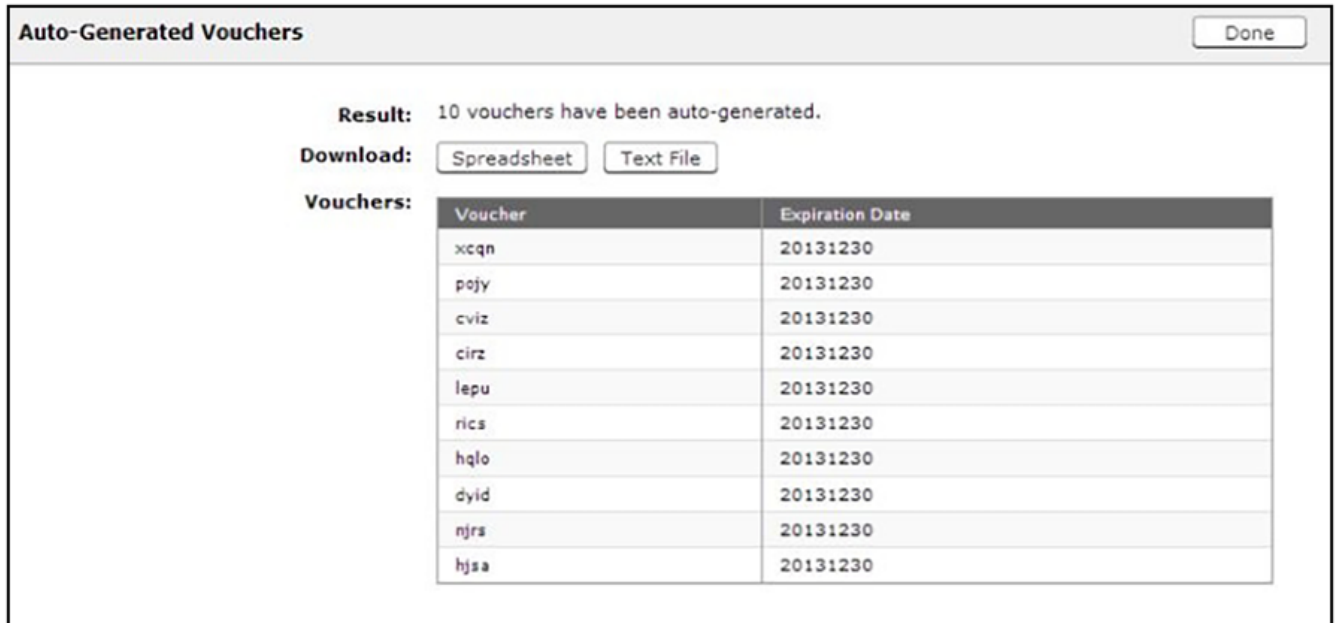


How to Generate Multiple Vouchers

You can have ES generate voucher for you. The automatically generated vouchers contain only the one-time password and expiration date, and are in the format specified in the voucher list. The generated vouchers can be downloaded as a CSV or TXT file.

1. On the **Create Vouchers** page, select **Generate multiple vouchers**.
2. Enter the number of vouchers to create.

FIGURE 19 ES-Generated Vouchers



3. Click **Done**.

The auto-generated vouchers are added to the voucher list.

How to Upload a List of Vouchers from a CSV file

Uploading a CSV file on the Sponsorship Portal is the same process as uploading a CSV file from the ES Admin UI.

If you are using a comma-separated value (CSV) file to upload multiple vouchers, the information must be formatted according to the instructions on the **Create Vouchers** page. A template file is available for download.

1. On the **Create Vouchers** page, select **Upload a CSV file containing a list of vouchers**.

2. Click **Choose File** to navigate to the CSV file to upload, and click **Next**.

FIGURE 20 Review Vouchers to Import

Voucher	Status	End-User Name	Company	Sponsor	Expires
401	Available			anna@cloudpath.net	20131230
402	Available			anna@cloudpath.net	20131230
403	Available			anna@cloudpath.net	20131230
404	Available			anna@cloudpath.net	20131230
405	Available			anna@cloudpath.net	20131230

3. Verify the vouchers to import and specify if voucher should be sent to user by email or SMS, and **Save**.
 - **Send vouchers by TXT messages** - If checked, the voucher is sent to the user by TXT, if a phone number is specified in the CSV file.
 - **Send vouchers by Email** - If checked, the voucher is sent to the user by email, if an email address is specified in the CSV file.
4. The **Voucher Lists** page shows which vouchers have been used, the expiration dates, and any guest user details that were entered when the sponsor created the voucher, or contained in the CSV file.

NOTE

The voucher field must be listed as **Show** in the voucher list to see it on the voucher table. For example, if **Days of Access** is set to **Do Not Show** on the voucher list, and your spreadsheet includes **Days of Access**, they do not appear in the voucher table. You must change the setting to **Show** in the voucher list. See [Creating a Workflow to Prompt User for Voucher](#) on page 6 for more information.

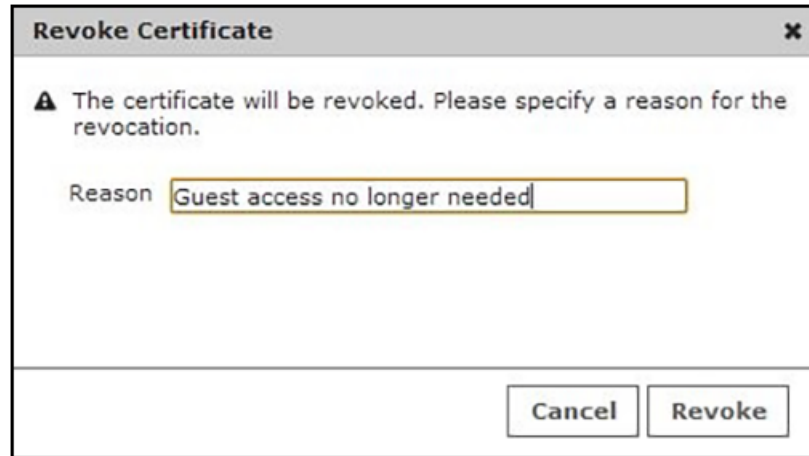
Managing Guest User Devices

With the correct permissions, sponsors can manage devices that have enrolled under their own sponsorship, or enrolled under any other sponsor. See [Adding Sponsors to a Voucher List](#) on page 10 for more information about setting Sponsor permissions.

1. From the Sponsorship UI, select **Sponsorship > Review Invitations**.
2. Select the appropriate link to view outstanding, consumed, expired, and revoked voucher invitations.
3. To revoke a voucher, use the **delete** icon.

4. On the **Revoke Certificate** pop-up, list the reason for revocation and click **Revoke**. The voucher is not longer usable.

FIGURE 21 Revoke Certificate

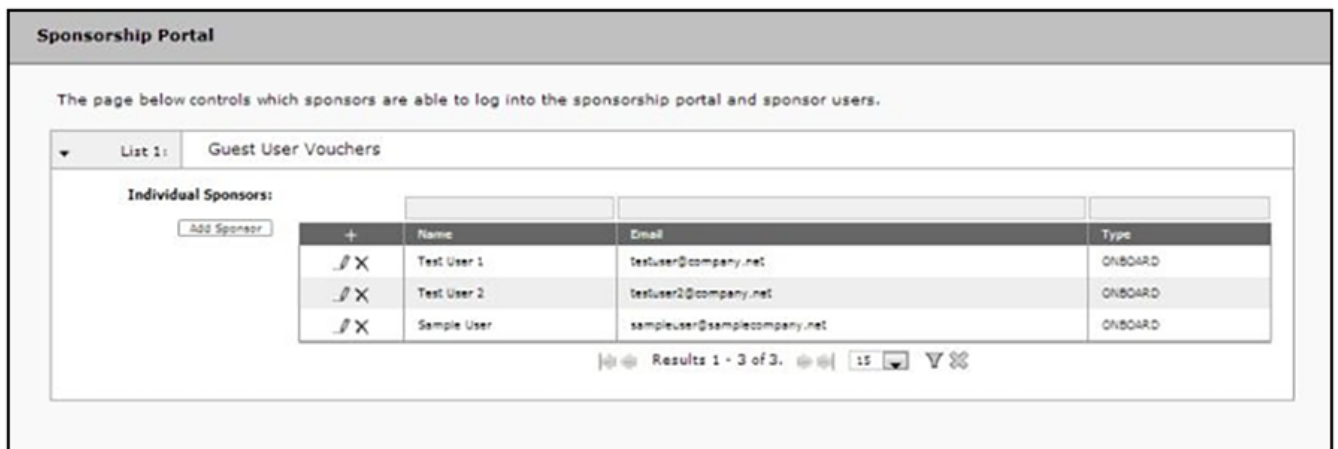


Managing Sponsors

With the correct permissions, you can manage sponsors in your Active Directory or LDAP Group. Permissions are set when sponsors are added to the voucher list using the Cloudpath Administrator user interface. See [Adding Sponsors to a Voucher List](#) on page 10.

1. From the Sponsorship UI, select **Administration > Sponsors**.
The tables show which sponsors are able to log onto the sponsorship portal and sponsor guest users using each voucher list.

FIGURE 22 Sponsors per Voucher List



2. From this page, eligible sponsors can add or delete other sponsors, edit sponsor login information, or modify sponsor permissions within their AD or LDAP group.
For details on configuring an authentication server for sponsors, see [Authentication Server Configuration for Sponsorship](#) on page 5.

Creating Voucher Lists and Vouchers in the Cloudpath UI

This section describes how to use the Cloudpath administrator can use the Cloudpath UI to create voucher lists and populate a voucher list. You can add a single voucher or upload multiple vouchers from a CSV file.

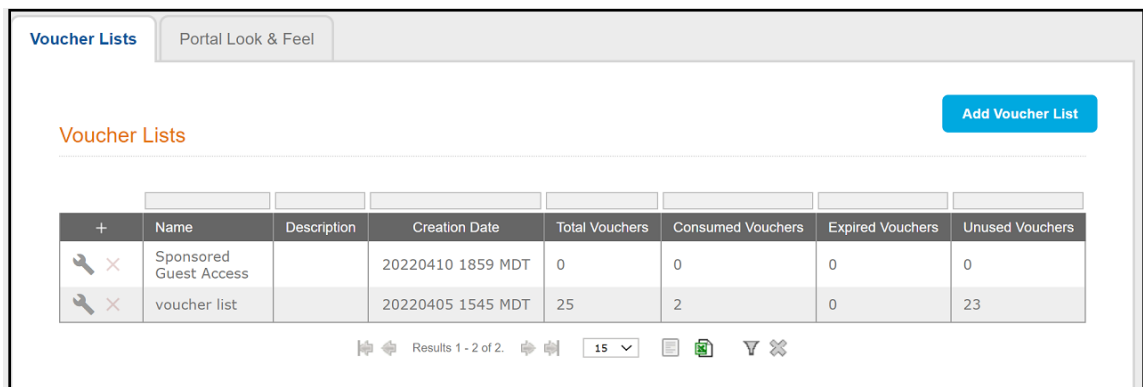
Creating Voucher Lists

You can create voucher lists in the Cloudpath UI to use in workflows.

Follow these steps to create a voucher list.

1. From the Cloudpath UI, go to **Managed Access > Sponsored Access > Voucher Lists** tab.
2. Click **Add Voucher List**.
3. In the ensuing Create Voucher List screen, configure the list. For instructions, refer to [Figure 3](#) on page 8 and the descriptions provided with that screen.
4. You can return to the view of all configured voucher lists to make sure that your list appears. The following screen shows an example of two lists having been configured.

FIGURE 23 Configured Voucher Lists



The screenshot shows the 'Voucher Lists' page in the Cloudpath UI. At the top, there are tabs for 'Voucher Lists' and 'Portal Look & Feel'. A blue 'Add Voucher List' button is located in the top right corner. Below the button, the title 'Voucher Lists' is displayed. A table with the following columns is shown: '+', 'Name', 'Description', 'Creation Date', 'Total Vouchers', 'Consumed Vouchers', 'Expired Vouchers', and 'Unused Vouchers'. The table contains two rows of data. The first row is for 'Sponsored Guest Access' and the second row is for 'voucher list'. At the bottom of the table, there are navigation icons, a pagination indicator 'Results 1 - 2 of 2', and a dropdown menu set to '15'.

	Name	Description	Creation Date	Total Vouchers	Consumed Vouchers	Expired Vouchers	Unused Vouchers
⚙️ ✕	Sponsored Guest Access		20220410 1859 MDT	0	0	0	0
⚙️ ✕	voucher list		20220405 1545 MDT	25	2	0	23

Adding Vouchers to a Voucher List

1. From the Cloudpath UI, go to **Managed Access > Sponsored Access > Voucher Lists** tab to view the voucher lists.

FIGURE 24 Configured Voucher Lists

	Name	Description	Creation Date	Total Vouchers	Consumed Vouchers	Expired Vouchers	Unused Vouchers
+	Sponsored Guest Access		20220410 1859 MDT	0	0	0	0
⚙️	voucher list		20220405 1545 MDT	25	2	0	23

2. Click the wrench icon of the voucher list where you want to add vouchers.

FIGURE 25 Voucher List - Three-tab View

Managed Access > Sponsored Access

View All Voucher Lists

Details | Vouchers | Sponsors

Voucher List Edit

Name: Sponsored Guest Access

GUID: OtpList-e0a9bc62-70d9-4f09-9276-e24250bf78b8

Voucher Format

Length: 4

Characters: ALPHABETIC (Lowercase)

Default Validity Length (days): 7

Default Reuse Count: 1

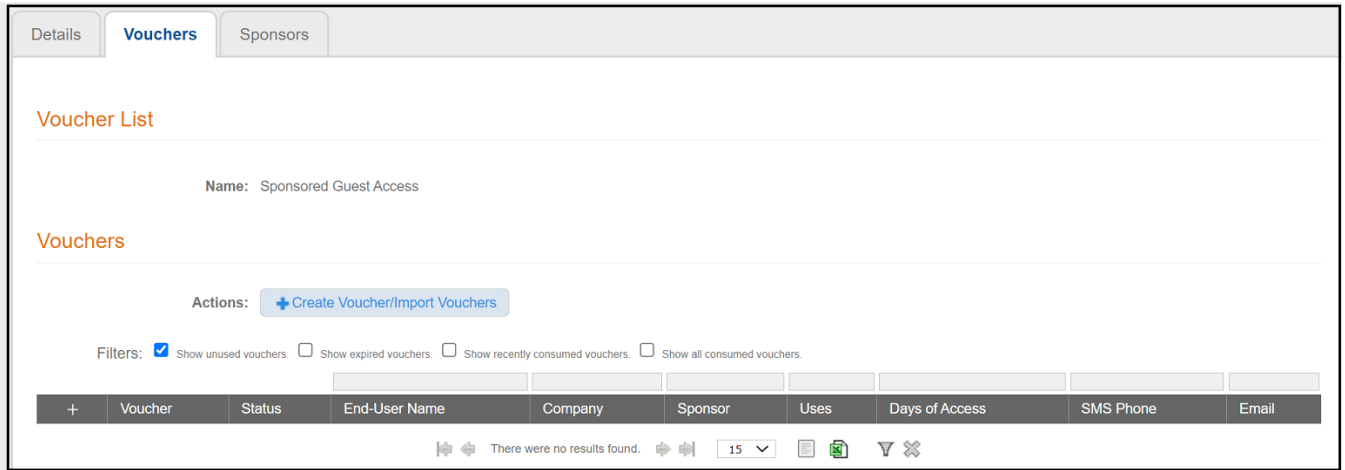
Default Days of Access: 0

Maximum Days of Access: 7

Actions: Edit

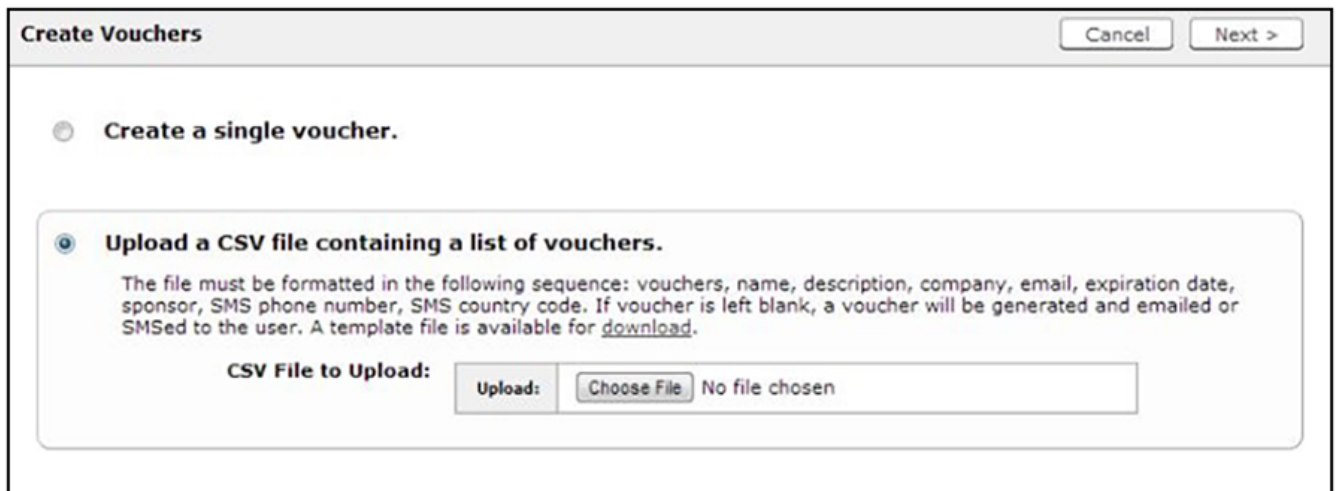
3. Click the **Vouchers** tab.

FIGURE 26 Vouchers Tab of Selected Vouchers List



4. Click the **Create Voucher/Import Vouchers** button to create a single voucher or upload a list of vouchers. The **Create Vouchers** page opens.

FIGURE 27 Create Vouchers



Adding a Single Voucher to a Voucher List

1. On the **Create Vouchers** page, select **Create a single voucher**, then click **Next**.

FIGURE 28 Create Single Voucher

Managed Access > Sponsored Access > Create

Cancel Back Save

Voucher Information

Voucher: bwzh

Name: JeffK

Company: Commscope

Email: jeffk@commscope.com

Email Voucher To User?

Phone Number: United S

SMS Voucher To User?

Reason:

Redeem Voucher By: 20220418

2. On the **Create Voucher** screen, enter the guest user information in the fields, as described below, and **Save**.

Only the Voucher field is required.

- **Voucher** - This field is pre-populated, but can be changed.
- **Name** - Guest user name.

NOTE

If **Require Username Match** has been specified in the voucher list, the guest must authenticate with a username that matches the name specified in the voucher provided by the sponsor. This allows the voucher to be locked to a particular user.

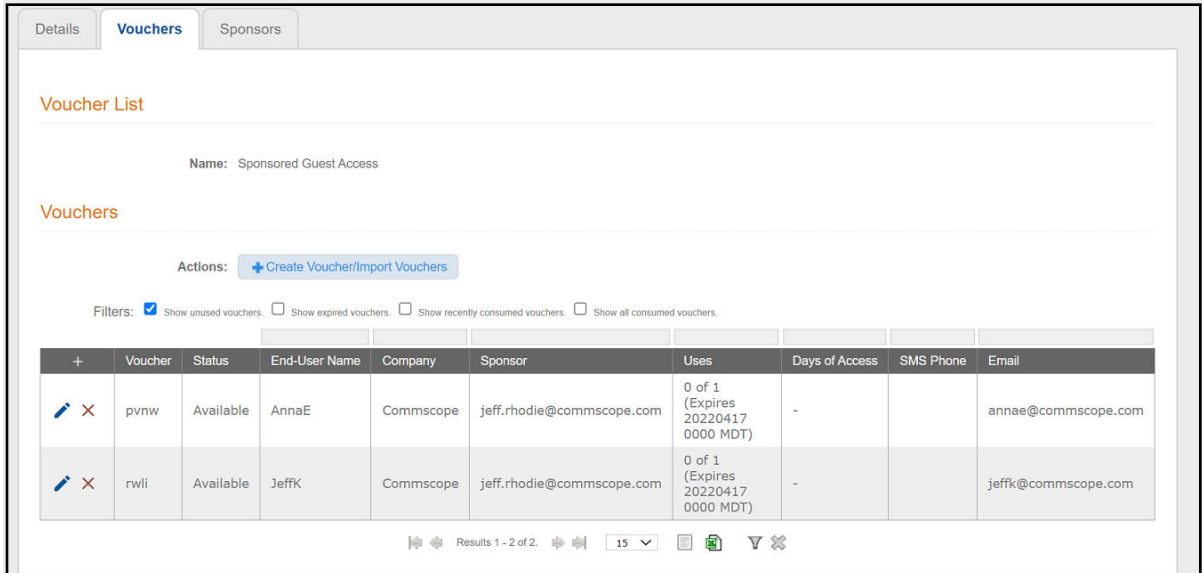
- **Company** - Guest user company.
- **Email** - Guest user email address.
- **Email Voucher to User?** - Checked by default. If checked and email is entered, voucher is sent to guest user by email.
- **Phone Number** - Select country and enter guest user phone number.
- **SMS Voucher to User?** - Checked by default. If this is checked and Phone Number is entered, voucher is sent to guest user by SMS.
- **Reason** - The reason the guest user is provided access.
- **Redeem Voucher By** - The date after which the voucher may longer be redeemed.

NOTE

Email and SMS notifications are stored on the Notifications tab on the Cloudpath Admin UI Dashboard.

3. Be sure that the vouchers you add are shown in the list of vouchers for the applicable voucher list. The following example screen shows that two vouchers have been added to the list called "Sponsored Guest Access."

FIGURE 29 Voucher List View After Two Vouchers Have Been Added



Adding Multiple Vouchers to a Voucher List

If you are using a comma-separated value (CSV) file to upload multiple vouchers, the information must be formatted according to the instructions on the **Create Vouchers** page. A template file is available for download.

1. On the **Create Vouchers** page, select **Upload a CSV file containing a list of vouchers**.

2. Click **Choose File** to navigate to the CSV file to upload and click **Next**.

FIGURE 30 Review Vouchers to Import

Review Vouchers To Import Cancel Save

Send Vouchers By TXT Message:

Send Vouchers By Email:

Voucher	Status	End-User Name	Company	Sponsor	Expires
401	Available			anna@cloudpath.net	20131230
402	Available			anna@cloudpath.net	20131230
403	Available			anna@cloudpath.net	20131230
404	Available			anna@cloudpath.net	20131230
405	Available			anna@cloudpath.net	20131230

Results 1 - 5 of 5. 15

3. Verify the vouchers to import and specify if voucher should be sent to user by email or SMS, and **Save**.
 - **Send vouchers by TXT messages** - If checked, the voucher is sent to the user by TXT, if a phone number is specified in the CSV file.
 - **Send vouchers by Email** - If checked, the voucher is sent to the user by email, if an email address is specified in the CSV file.

The **Voucher Lists** page shows which vouchers have been used, the expiration dates, and any guest user details that were entered when the sponsor created the voucher, or contained in the CSV file.

NOTE

The voucher field must be listed as **Show** in the voucher list to see it on the voucher table. For example, if **Days of Access** is set to **Do Not Show** on the voucher list, and your spreadsheet includes **Days of Access**, they do not appear in the voucher table. You must change the setting to **Show** in the voucher list. See Adding a Voucher Prompt to the Enrollment Workflow for more information.



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