



## Defining Captive Portal Rules to Display Captive Portals

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The WiFi Engage enables you to create captive portals and display them to the customers connected to a particular Wi-Fi ID (SSID). In the WiFi Engage, captive portals are displayed to the customers based on the captive portal rules defined.

This chapter describes how to create the captive portal rules that enable you to display the captive portals to the customers when they are connected to a particular SSID.

### Configuring the Captive Portals Using the Captive Portal Rule

To configure the captive portal, perform the following steps:

1. [Enabling the SSIDs in the Meraki, page 4-1](#)
2. [Accessing the WiFi Engage, page 3-2](#)
3. [Importing the SSIDs, page 4-2](#)
4. [Defining the Location Hierarchy, page 3-2](#)
5. [Creating the Portals, page 4-3](#)
6. [Creating Tags, page 4-4](#)
7. [Creating a Captive Portal Rule, page 4-4](#)



Note

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You need to have the Meraki and WiFi Engage accounts to configure the captive portals.

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### Enabling the SSIDs in the Meraki

To import the SSIDs to the WiFi Engage, you need to enable those SSIDs in the Meraki.



Note

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As the Meraki is not a part of the Enterprise Mobility Services Platform, the menu path and menu names are subject to change.

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To enable the SSIDs in the Meraki, perform the following steps:

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- Step 1** Go to <https://meraki.cisco.com>.
- Step 2** Log in to the application using the login credentials for your Meraki account.
- Step 3** Click the Meraki organization in which you want to enable the SSIDs, and choose the required network.
- Step 4** Choose **Wireless > Configure > SSIDs**.  
The SSIDs available for the network appears.
- Step 5** Rename the SSID and enable it.
- Step 6** Click **Edit Settings**, and in the Splash page option, choose the **Click-Through** radio button.




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**Note** If you need to apply a radius server configuration for your SSID, choose the respective option. For more information see the “[Radius-Authentication for the Portals](#)” section on page 7-27.

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- Step 7** Click **Save Changes**.  
The SSID is successfully enabled in the Meraki.
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## Accessing the WiFi Engage

The procedure to access the WiFi Engage is described in the “[Accessing the WiFi Engage](#)” section on page 3-2.

## Connecting to the Meraki from the WiFi Engage

The procedure to connect to the Meraki from the WiFi Engage is described in the “[Connecting to the Meraki Network](#)” section on page 3-3.

## Importing the SSIDs

The SSIDs refer to the network IDs that you connect to access the internet through Wi-Fi. To create the captive portal rules for an SSID of Meraki, you need to import that SSID from the Meraki network.

To import the SSIDs for a Meraki network, you need to enable the SSIDs in <https://meraki.cisco.com>. For more information, see the “[Enabling the SSIDs in the Meraki](#)” section on page 4-1. The enabled SSIDs are available for importing.

To import the SSIDs, perform the following steps:

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- Step 1** In the WiFi Engage dashboard, choose **SSIDs**.  
The SSIDs page appears.
- Step 2** Click **Import**.  
The Please Select SSID to Import page appears.
- Step 3** Select the SSIDs you need to import, and click **Import SSID**.  
The imported SSIDs appear in the SSIDs window.

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**Step 4** Click the **Activate** button for the SSID to update the WiFi Engage configurations for the SSID in the Meraki.  
The SSID Configuration Sync window appears with the SSID updates that need to be configured in the Meraki.

**Step 5** Click **Update**.  
You can manually also configure the SSIDs in the Meraki. To know how to manually configure the SSIDs in the Meraki, see the “[Manually Configuring the SSIDs](#)” section on page 4-8.



**Note** As the WiFi Engage needs to synchronize with the Meraki network to load the imported SSIDs, you may need to refresh the window to view the imported SSIDs.

For more information on updating the configurations in the Meraki, see the following:

- [Synchronizing with the Meraki](#), page 4-7
- [Advanced Configurations for the SSID](#), page 4-8

## Defining the Location Hierarchy

The procedure to define the location hierarchy is described in the “[Defining the Location Hierarchy](#)” section on page 3-2.

## Creating the Portals

A portal is the user interface that appears when a Wi-Fi user is connected to an SSID. You can enhance the portals using the various portal modules provided by the WiFi Engage.

To create a portal, perform the following steps:

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- Step 1** In the WiFi Engage dashboard, choose **Portal**, and click **Create New**.
- Step 2** In the Portal window that appears, enter a name for portal in the Name field, and click **Create**.  
The portal page appears with the portal modules on the left and portal preview on the right.
- Step 3** Add features to the portal using the [Portal Modules](#).



**Note** To capture the customer details such as name, phone number, and so on, ensure that you add a Data Capture module in the captive portals. Before provisioning the internet, the data capture form is displayed to the customer. The captured customer details are stored in the WiFi Engage database. The Data Capture module is available for the Hard SMS with Verification Code and E-mail authentication types.

- Step 4** Click **Save** to save the changes made to each module.
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## Creating Tags

The procedure to define tags is defined in the [“Creating Tags or Including or Excluding the Customers from an Existing Tag Using a Profile Rule”](#) section on page 6-1.



Note

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This step is required only if you want to use the tag filter in your captive portal rule.

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## Creating a Captive Portal Rule

The Captive Portal Rule refers to the conditions based on which a captive portal is displayed to the customers who is connecting to a particular SSID.

You can configure to show a captive portal for a combination of an SSID, locations, tags, number of visits, and duration.

You can filter the locations in which a captive portal is to be shown based on the locations or the metadata associated with the locations. You can show a portal based on the number of visits made by the customer to the specified locations during the specified time. You can also configure to show a portal only during a particular period, only for certain days of a week, and only during a particular time.

To create a captive portal rule to show a portal, perform the following steps:

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- Step 1** In the WiFi Engage dashboard, choose **Proximity Rules > Captive Portal Rule**.
  - Step 2** Click **Create a new rule**.
  - Step 3** In the Rule Name text field, enter a name for the captive portal rule.
  - Step 4** In the Sense area, perform the following steps:
    - a. From the drop-down list after “When a user is on”, choose **WiFi**.
    - b. From the drop-down list after “and connected to”, choose the SSID for which you want to show the captive portal.



Note

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The SSIDs are available for selection only if you have imported the SSIDs. For more information on importing SSIDs, see the [“Importing the SSIDs”](#) section on page 4-2.

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- Step 5** In the Locations area, specify the locations for which you want to show the portal.
 

You can configure to show the portal for the entire location hierarchy, or a single or multiple Meraki organization, group, location, floor, or zone. For more information on creating the location hierarchy, see the [“Defining the Location Hierarchy”](#) section on page 3-1.

You can also filter the locations based on the metadata defined for the selected location, or its parent or child locations. For more information on configuring the metadata for the locations, see the [“Defining Metadata for a Location Element”](#) section on page 3-6. You can either show the portal for the locations with a particular metadata or exclude the locations with a particular metadata.

To specify the locations in which you want to show the captive portal, perform the following steps:

  - a. Click the **+** button.
  - b. In the Choose Location window that appears, select the locations for which you want to apply the captive portal rule.
  - c. Click **OK**.

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To apply the rule for locations with a particular metadata, perform the following steps:

- a. Select the **Filter by Metadata** check box.
- b. In the Filter area, click the + button.  
The Enter Location Metadata window appears.
- c. From the drop-down list, choose the metadata variable, and enter the value for the variable in the adjacent field.
- d. Click **OK**.

To exclude the locations with a particular metadata, perform the following steps:

- a. Select the **Filter by Metadata** check box.
- b. In the Exclude area, click the + button.  
The Choose Location Metadata window appears.
- c. From the drop-down list, choose the metadata variable.
- d. Click **OK**.

**Step 6** In the IDENTIFY area, specify the type of customers for whom you want to show the portal.

**Note**

You can filter the customers for whom you want to show the captive portal based on whether the customer is an opted in or not opted in user, the tags the customers belong to, the number of visits made by the customer, and the status of app in the customer's device. You can apply all these filters or any of them based on your requirement.

To specify the customers for whom the captive portal is to be shown, perform the following steps:

- a. If you want to filter the customers by the Opt In Status, select the Filter by OptIn Status check box, and from the Only for drop-down list, choose whether you want show the captive portal for opted in users or not opted in users.

**Note**

For more information on Opted In users, see the [“Opted In Users” section on page 6-7](#).

- b. If you want to filter the customers based on tags, select the **Filter by Tags** check box.

**Note**

You can filter the tags in two different ways. Either you can specify the tags for which the portal must be shown or you can specify the tags for which the portal must not be shown. You can choose the best filtering method based on your requirement. For example, if you want to show the portal for all tags except for one tag, it is easy to opt the exclude option, and mention that particular tag for which you do not want to show the portal.

- To include the tags so that the portal is shown only to the customers in the selected tags, use the + button for “Include”.
- To not show the portal to the customers in the tags that are excluded, use the + button for “Exclude”.

For more information on using the tag filter, see the [“Filtering by Tag” section on page 6-6](#).

- c. If you want to filter the customers based on the number of visits made by the customer in the selected locations, select the **Filter by Visits** check box.

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Click the+ button. In the Choose location window, select the locations of which the customer visit needs to consider for filtering. In the following fields, mention the number of visits and duration for filtering. For more information on the visits and duration you can configure, see the “[Notification Criteria](#)” section on page 5-17.

- d. If you want to filter the customers based on the customer’s app status, select the **Filter by App Status** check box. From the “Filter by the users who” drop-down list, choose the status of the app users for which you want to show the portal.

**Step 7** In the Schedule area, specify the period for which you want to apply the rule.

- a. Select the Set a time range for the rule check box and in the fields that appear, specify the time range for which you want to apply the captive portal rule.
- b. Select the Set a date range for the rule check box, and in the fields that appear, specify the start date and end date for the period for which you want to apply the captive portal rule.
- c. If you want to apply the rule only on particular days, select the Filter by days of the week check box, and from the list of days that appears, click the days on which you want to apply the rule.

**Step 8** In the Actions area, from the Show them Portal drop-down list, choose the captive portal that you want to show when the conditions defined are met.




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**Note** The summary of the rule is shown on the right side of the page.

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**Step 9** Click **Save and Resume**.

The captive portal rule is published.




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**Note** If you do not want to publish the rule now, you can click the Save button. You can publish the rule at any time later by clicking the Save and Resume button.

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## Example

XYZ is a business group that is engaged in different stream lines of business from mobile stores to super markets. XYZ has 5 mobile stores and 4 supermarkets at various locations in New York. The SSID of XYZ in New York is XYZID. XYZ wants to show a captive portal C1, that displays the offers available for various items in the super market, when the customers connect to XYZID from XYZ’s super markets. Similarly, a captive portal, C2, must be shown to customers who connect to the XYZID from XYZ’s mobile stores. The captive portal must be shown to the customers that are not opted in.

Locations with super markets: L1, L2,L3,L4, L5

Locations with mobile stores: L7, L8, L9, L10

To achieve the preceding scenario, perform the following steps:

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**Step 1** In the Meraki, enable the SSID, XYZID. For more information on enabling the SSID in the Meraki, see the [Enabling the SSIDs in the Meraki](#), page 4-1.

**Step 2** Log in to the WiFi Engage.

**Step 3** Add XYZID to the WiFi Engage using the Import SSID option.

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- Step 4** Create the location hierarchy for XYZ. . In the location hierarchy, all the supermarkets and mobile store of XYZ in New York must be defined as location elements under the location, New York. Add a location metadata for the locations L1, L2, L3, L4, and L5 with key as **StoreType** and value as **SM**. Add a location metadata for the locations L7, L8, L9, and L10 with key as **StoreType** and value as **MS**. For more information on defining the location metadata, see the “[Defining Metadata for a Location Element](#)” section on page 3-6.
- Step 5** Create portal **C1** for super market and portal **C2** for mobile stores. For more information on creating the portals, see the “[Creating the Portals](#)” section on page 4-3.
- Step 6** In the WiFi Engage dashboard, choose **Proximity Rules > Captive Portal Rule**.
- Step 7** Click **Create a new rule**.
- Step 8** In the RULE NAME field, enter the name, **R1**, for the captive portal rule.
- Step 9** From the “When a user is on” drop-down list, choose **WiFi**, and from the “and connected to” drop-down list, choose **XYZID**.
- Step 10** In the Locations area, perform the following steps:
- Click the + button, and in the Choose Location window that appears, select the location for New York, and click **OK**.
  - Select the Filter by metadata check box, and click the + button for Filter.
  - In the Enter Location Metadata window, select the key, **StoreType**, from the drop-down list, and enter the value **SM**.
-  **Note** As the location metadata "StoreType" is defined for the locations that are under the location "New York", it will be available for selection in the Enter Location Metadata window.
- Step 11** In the Identify area, select the Filter by OptIn Status check box, and from the Only for drop-down list, choose **not Opted In Users**.
- Step 12** In the Schedule area, select the Set a date range for the rule check box, and specify the start date as today’s date and end date as last date of this year.
- Step 13** In the Actions area, from the Show them Portal drop-down list, choose **C1**.
- Step 14** Click **Save and Resume**.
- Step 15** Similarly, create another rule, **R2**, for the Mobile Group, with the location metadata key as **StoreType** and value as **MS**, and the captive portal, **C2**.

Now, when a customer visits XYZ’s super market and connects to XYZID, **C1** is shown. When the same customer connects to XYZID from XYZ’s mobile store, **C2** is shown.

## Synchronizing with the Meraki

If there is any WiFi Engage configuration update that is not synchronized with the Meraki network for an SSID, a red indicator appears against the SSID in the SSIDs window. Click the Sync link to synchronize. After synchronization, the indicator turns green.

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## Advanced Configurations for the SSID

The WiFi Engage displays whether a radius server from the Enterprise Mobility Services Platform or a captive portal created using the Enterprise Mobility Services Platform Studio is configured for an SSID. If either of these, or both of these are configured for an SSID, then an Advanced Configuration With Meraki message appears against that SSID in the Actions column of the SSID window.

In addition, for the radius server configuration, the Radius Server Configuration message appears in the Remarks column. Similarly, for an Enterprise Mobility Services Platform Studio portal configuration, the details of the Enterprise Mobility Services Platform Studio Portal configuration appear in the Remarks column of the SSID. A green indicator is shown for each of these configurations.

If the Radius server or captive portal configured is not of the Enterprise Mobility Services Platform, the sync option appears in red.

You can revert the advanced configurations for an SSID by clicking the corresponding Revert to Basic Config button. Then, the WiFi Engage captive portal gets configured for that SSID.

## Manually Configuring the SSIDs

To manually configure an SSID in the Meraki, you have to initially import that SSID in the WiFi Engage. For more information, see the [“Importing the SSIDs” section on page 4-2](#).

To configure the SSID manually in the Meraki, perform the following steps:

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- Step 1** Go to [meraki.cisco.com](https://meraki.cisco.com).
  - Step 2** Log in to the application using the login credentials for your Meraki account.
  - Step 3** Choose the required Meraki organization and network from the respective drop-down list.
  - Step 4** Choose **Wireless > Access Control**.
  - Step 5** From the SSID drop-down list, choose the SSID that you want to configure for the WiFi Engage.
  - Step 6** In the splash page area, choose **Click-through**.
  - Step 7** From the Wall garden drop-down list, choose **Wall garden is enabled**.
  - Step 8** In the Wall garden ranges text field, enter the required wall garden ranges.  
To view the wall garden ranges, in the WiFi Engage dashboard, choose SSIDs, and then click the [Configure SSIDs Manually?](#) link.
  - Step 9** Click **Save Changes**.
  - Step 10** Go to **Wireless > Splash page**.
  - Step 11** For the previously selected SSID, in the Custom Splash URL area, choose **Or provide a URL where customers will be redirected**, and in the adjacent field enter the splash URL.



### Note

When you import an SSID to the WiFi Engage, the splash page URL for the SSID is generated in the WiFi Engage. To view the splash URL for an SSID, in the WiFi Engage dashboard, click SSIDs, and then click the [“Configure SSIDs Manually?”](#) link.

- Step 12** Click **Save Changes**.
  - Step 13** Repeat steps 4-12 for all the SSIDS that you want to use in the WiFi Engage.
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