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Welcome

Welcome to the Guest Management Portal.

The Guest Management Portal is a Web-based portal that enables corporate personnel to view and manage network guests who have requested access to the organization's network. When access is approved, guests can browse the network and possibly use other network resources.

Individuals who manage network guests from this portal are referred to as sponsors.

Sponsors can use the Guest Management Portal for various tasks, including:

- Viewing all their sponsored guests.
- Importing lists of guests to be granted network access, and adding a single guest. These guests are automatically approved for network access.
- Approving and declining guests who registered for network access using the Guest Registration form.
- Revoking network access to guests who were approved.
- Assigning and updating network access approval periods.
- Assigning tags to guests. Tags can be used in CounterACT policies.

The Guest Management Portal in your organization may look different from the examples shown in this document.

Your system may be set up so that you receive email confirmation regarding some or all of your guest management activities. See Receive Email Confirmation for details.
Supported Guest Management Portal Browsers

The Guest Management Portal can be accessed using any of the following browsers:

- Internet Explorer 11x, Edge
- Safari 9.0 and above on MAC OS; Safari 8.3 and above on iOS
- Chrome 46 and above
- Firefox 43.0 and above
- Android Browser 1.5 and above

Sign In to the Guest Management Portal

Sign in to the Guest Management Portal from your web browser.

To sign in:

1. Open your web browser and enter your organization's portal address in the address field. The portal address format is:

   https://X.X.X.X/sponsor

   where X.X.X.X is a number or name provided to you by your administrator.

2. Enter your user name and password in the **User name** and **Password** fields.

   Enter the same user name and password you enter when signing in to your network. Contact your network administrator if you cannot sign in, and ask to be added to the corporate list of CounterACT sponsors.

3. Select **Sign In** or press the Enter key. The Guest Management Portal opens in your web browser, displaying the first page of your guest list.
In the examples shown in this document, the sponsor is guyr as displayed at the top right. In your organization, you will see your own user name.

The Guest List

The Guest Management Portal displays information about the guests you need to handle. The same guests may also be assigned to other sponsors. The portal indicates which guests are waiting for network access approval, as well as information about guests that were already approved, declined, revoked, and whose network access has expired.

If you are a Sponsor, you can view and manage guests assigned to you.

If you are an Admin Sponsor, you can view and manage all guests that have registered for network access, and can override the decisions of other sponsors.

This section describes the tools and information you see in the Guest Management Portal guest list.

- Use the Sign Out and Help Options
- Use the Guest Management Portal Toolbar Options
- Review Guest Management Portal
• **View Guest Details**
• **Find Information You Need in the Portal**

**Use the Sign Out and Help Options**
There are two buttons at the top right of all Guest Management Portal pages.

<table>
<thead>
<tr>
<th>Sign Out</th>
<th>Sign out when you are finished using the portal. The Guest Management Portal Sign In page will be displayed.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Help</td>
<td>Open this How-to Guide.</td>
</tr>
</tbody>
</table>

**Use the Guest Management Portal Toolbar Options**
The toolbar at the top of the portal guest list pages contains the following buttons and information:

<table>
<thead>
<tr>
<th>Add Guest</th>
<th>Add a single guest to the Guest Management Portal. When you add a single guest, you automatically approve network access to that guest. See Add Guests for details.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Import Guests</td>
<td>Import a list of pre-defined guests to the Guest Management Portal. When you import guests to the portal, you automatically approve network access to those guests. See Import a List of Guests for details.</td>
</tr>
<tr>
<td>Refresh</td>
<td>Refresh the display using the currently applied sorting. Available sort methods are:</td>
</tr>
<tr>
<td></td>
<td>▪ Newest entry to oldest entry (<strong>default</strong>)</td>
</tr>
<tr>
<td></td>
<td>▪ Selected column ascending (▲)</td>
</tr>
<tr>
<td></td>
<td>▪ Selected column descending (▼)</td>
</tr>
<tr>
<td></td>
<td>Press <strong>F5</strong> to refresh the display using the default sort method.</td>
</tr>
<tr>
<td>Guest Count</td>
<td>View the number of guests displayed on the page, and the total number of guests assigned to you.</td>
</tr>
<tr>
<td>Page Backward</td>
<td>▪ Press the left arrow (◄) to display the previous portal page.</td>
</tr>
<tr>
<td></td>
<td>▪ Press the double-left arrow (◄◄) to display the first portal page.</td>
</tr>
<tr>
<td></td>
<td>The applied sorting is maintained for the display. See Refresh for the available sort methods.</td>
</tr>
<tr>
<td></td>
<td>Buttons appear gray when unavailable for use.</td>
</tr>
</tbody>
</table>
### Review Guest Management Portal Information

The following information is displayed for each guest in the portal guest list:

<table>
<thead>
<tr>
<th>Name</th>
<th>The name of the guest. (Optional)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Email</td>
<td>The guest's email address, or other value used to identify the guest.</td>
</tr>
<tr>
<td>Status</td>
<td>The approval status of the guest:</td>
</tr>
<tr>
<td></td>
<td>☒️ Pending</td>
</tr>
<tr>
<td></td>
<td>✔️ Approved</td>
</tr>
<tr>
<td></td>
<td>☹️ Declined / Revoked</td>
</tr>
<tr>
<td></td>
<td>☀️ Expired</td>
</tr>
<tr>
<td>Approved From Approved To</td>
<td>The date range in which the guest can access the network. Notes:</td>
</tr>
<tr>
<td></td>
<td>- If your Guest Management Portal was upgraded from an earlier version, the <em>Approved From</em> field may be empty.</td>
</tr>
<tr>
<td></td>
<td>- If the guest has been approved for an indefinite period, the Approved To field displays <em>Unlimited</em>.</td>
</tr>
<tr>
<td></td>
<td>- If the guest status is <em>Pending</em>, the Approved date fields may display <strong>N/A</strong>.</td>
</tr>
<tr>
<td>Company</td>
<td>The company name of the guest. (Optional)</td>
</tr>
<tr>
<td>Approved By</td>
<td>The sponsor who approved the guest or made the latest change to the guest status.</td>
</tr>
<tr>
<td>Sponsors</td>
<td>Sponsors to whom the guest is assigned. The guest may be assigned more than one sponsor. This means that another sponsor can override the status you assign to the guest.</td>
</tr>
</tbody>
</table>

If the portal does not display information you think is accurate, an *Admin Sponsor* or another sponsor may have overridden the information.
View Guest Details

Individual guest details can be displayed on a separate guest page. This page provides information displayed on the guest list pages as well as additional information.

Various options are available from this page, depending on the approval status of the guest.

To view guest details:

1. Select a guest in the guest list. The Guest Details page opens.

<table>
<thead>
<tr>
<th>Name:</th>
<th>Adam Adams</th>
</tr>
</thead>
<tbody>
<tr>
<td>Email:</td>
<td><a href="mailto:adams@samplecorp.com">adams@samplecorp.com</a></td>
</tr>
<tr>
<td>Phone:</td>
<td>(312) 312-3121</td>
</tr>
</tbody>
</table>

*Approval period:*

| From: | 5/19/16 3:15 PM |
| To: | 5/19/16 4:00 PM |

Tags: office3

Message to Guest: Welcome. The receptionist will show you which office to use.

Company: Sample Corp

Location: 3rd floor Room 313

Approved By: guyr

Sponsors: guyr@labforscout.com

Comment: Comes highly recommended

Guest Details

The following guest details are displayed.

<p>| Name | The name of the guest. |</p>
<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Email</td>
<td>The guest's email address, or other value used to identify the guest. (Required)</td>
</tr>
<tr>
<td>Phone</td>
<td>The phone number of the guest.</td>
</tr>
<tr>
<td>Status</td>
<td>The approval status of the guest:</td>
</tr>
<tr>
<td></td>
<td>Pending</td>
</tr>
<tr>
<td></td>
<td>Approved</td>
</tr>
<tr>
<td></td>
<td>Declined / Revoked</td>
</tr>
<tr>
<td></td>
<td>Expired</td>
</tr>
<tr>
<td>Approval period</td>
<td>The time range in which guest access to the network is requested. (Required)</td>
</tr>
<tr>
<td>Tags</td>
<td>One or more tags that help your administrator categorize guests.</td>
</tr>
<tr>
<td>Message to guest</td>
<td>A confirmation message for the guest.</td>
</tr>
<tr>
<td>Company</td>
<td>The company name of the guest.</td>
</tr>
<tr>
<td>Location</td>
<td>The physical location of the guest or event.</td>
</tr>
<tr>
<td>Approved By</td>
<td>The name of the person who approved network access for this guest.</td>
</tr>
<tr>
<td>Sponsors</td>
<td>One or more user identities that can manage this guest on the Guest Management Portal.</td>
</tr>
<tr>
<td>Comment</td>
<td>Additional information provided when the guest was added to the Guest Management Portal.</td>
</tr>
<tr>
<td></td>
<td>• If the guest was added via guest registration, this comment was optionally provided by the guest.</td>
</tr>
<tr>
<td></td>
<td>• If the guest was added to the portal by a sponsor, this comment was optionally provided by the sponsor.</td>
</tr>
</tbody>
</table>

Required fields that can be edited are marked with an asterisk.

**Buttons**

Different buttons are displayed depending on the guest's status. When you are finished viewing or updating the guest details, select one of the following buttons to close the window and return to the first page of your guest list.

- **OK**: If you cannot change any guest details, **OK** is the only option displayed.
- **Update Guest**: If you changed guest details, select **Update Guest** to save the changes.
- **Revoke**: Select **Revoke** to revoke network access for this guest. The guest status is changed from **Approved** to **Revoked**. Changes you made to the guest details are saved.
- **Approve**: Select **Approve** to approve network access for this guest. The guest status is changed from **Pending** to **Approved**. Changes you made to the guest details are saved.
Find Information You Need in the Portal

This section describes the tools you can use to quickly find information of interest in the Guest Management Portal.

Search for Information

Use the portal search tool to find the guest information you need. The search is carried out on the following fields displayed in the guest list pages:

- Name
- Email
- Status
- Company
- Approved By
- Sponsors

The search does not include the Approved From or Approved To dates, or information displayed in the Guest Details page only.

To search for guest information:

1. Enter text in the search field at the top right of any guest list page. All guests in the portal whose information matches the text are displayed.

2. To clear the search, select x next to the search field.
**Sort Information**

Sort the list of guests by the contents of a specific column to help you quickly find information you need.

- Sort alphabetically, such as by *Name* or *Status*.
- Sort chronologically by *Approved From* or *Approved To* dates.

You can sort the entire list of guests, or only guests found during a search.

**To sort information:**

1. In any guest list page, select a column header. The guest list is sorted in ascending order of that field.

   2. To sort in descending order, select the same column header again.

**Approve Access to Pending Guests**

This section describes how to approve requests for guest access to the network.

Guest network access is approved for a limited time period. When you approve a guest for network access, the *From* date and time is the period from which the guest is allowed to access the network. You cannot define this period for guests whose status is *Pending*. The Guest Management Portal automatically updates this information to the current date and time.

A *To* date and time is predefined, based on the request of the guest and the *Maximum Approval Period* defined by your administrator. This is the date and time until which the guest will be allowed to access the network. You can change the pre-defined date and time, provided it is within the maximum approval period.

**Maximum Approval Period**

You may be limited to a maximum approval date and time or period length. For example, you may be allowed to approve access for *up to* nine hours. When this happens, you can approve access for up to the maximum allowed period, but not for more time.
The maximum approval restrictions are displayed in the **Approval period** section of the guest details page. An error message appears if you enter an approval **To** date or time that does not match your organization’s restrictions.

**Guest Approval**

**To approve a guest request:**

1. From the guest list page, select a guest with the **Pending** status. The Guest Details page opens.
2. To change the default To date and time, in the Approval period section, perform the following:
   
a. Select the calendar icon in the To field. The Select To Date calendar opens. The current date is automatically highlighted in blue.

   ![Select From Date: 8/24/16]

   a. Select a To date and then select Save. The To date you selected appears in the Approval period section.
   b. Select the time icon in the To field. A clock window opens.

   ![Select From Date: 8/24/16]

   d. Use the arrows to select a time (in 30 minute increments) or type in a value, select the AM / PM field if you need to change it, and then select Save. The To time you selected appears in the Approval period section.

3. Select Approve . A notification is sent to the email or mobile phone of the guest. The notification includes the time period for which network access is approved, as well as the guest sign-in name and the password. The sign-in name is the email address defined for the guest. The password is pre-defined.

Expiration of Guest Access

Approved network access of a guest expires at the Approved To date and time. At this time, the guest can no longer access the network.
Your administrator may have configured your system to remove expired guests from the portal after a certain period of time. This means that expired guests may be displayed in the Guest Management Portal for a limited time.

## Decline Access to Pending Guests

This section describes how to decline requests for guest access to the network.

Your administrator may have configured your system to remove declined guests from the portal after a certain period of time. This means that declined guests may be displayed in the Guest Management Portal for a limited time.

### To decline a guest network access request:

1. From the guest list, select the guest with the *Pending* status. The Guest Details page opens.

   ![Guest Management Portal](image)

   - **Name:** Adam Guest
   - **Email:** guest3@email.com
   - **Phone:** 3456-7890

   - **Approval period:** From: 5/15/16 4:07 PM
     To: 6/15/16 11:59 PM

   - **Tags:** Add a tag

   - **Message to Guest:**
     - **Company:** My Company
     - **Location:** Lobby

   - **Approved By:**
     - **Sponsors:** nig@lab.com
     - **Comment:** Leave a note about the guest

   - **Actions:** Approve, Decline, Cancel

2. Select **Decline**. The guest status is displayed as **Declined**.
Revoke Approved Guests

This section describes how to revoke guests who were already approved. When you revoke guests, their network access is blocked immediately.

Your administrator may have configured your system to remove revoked guests from the portal after a certain period of time. This means that revoked guests may be displayed in the Guest Management Portal for a limited time.

To revoke an approved guest:

1. From the guest list, select the approved guest to be revoked. The Guest Details page opens.

2. Select Revoke. The guest status is displayed as Revoked.
Work with Expired, Revoked or Declined Guests

The details of any guest whose status is *Expired, Revoked or Declined* cannot be updated. These guests cannot be admitted to the network. If you need to approve a guest that has been assigned one of these statuses, add a new guest having the same email address. When a guest is added to the portal, previous information associated with the email address no longer applies.

Ъ You cannot add a guest with the same email address as an existing guest whose status is Approved or Pending.

Add Guests

When guests are added to the Guest Management Portal and approved, they are granted access to the network during the approval period that you define.

In addition to the approval period, you can define other guest information, such as:

- The guest name, email (required) and company name
- A comment about the guest
- A message to be sent to the guest

When you approve a guest for network access, the Approval period *From* date and time is the date and time from which the guest is allowed to access the network. The *To* date and time is the latest date and time in which the guest will be allowed to access the network.

After adding the guest, a notification is sent to the email or mobile phone of the guest. The notification includes:

- The time period for which network access is approved
- The user name with which the user must sign in
- The password with which the user must sign in; this may be generated automatically
- A message, if you defined one

To add a guest:

1. In the toolbar at the top of any guest list page, select **Add Guest**.
   The New Guest page opens.
2. In the **Name** field, enter the name of the guest (optional).
   
   * The following characters are not valid for this field: !@#$%^&*()+=\[\]/{}|:<>?

3. In the **Email** field, enter the email of the guest (required).
   
   * The email must not contain a double dash or a comma. Only the following characters are valid for this field: a-z, A-Z, 0-9, ., ,_, @, –

4. In the **Phone** field, enter the phone number of the guest (optional). Your system may be set up to send network access information as a text message to this phone number.

5. In the **Approval period** section, the **From** period is automatically defined to indicate the current date and time and the **To** period is automatically defined to indicate the end of next day. You can update both periods:
   
   a. Select the calendar icon in the field. The Select Date calendar opens. The default date is automatically highlighted in blue.
b. Select a date and then select **Save**. The date you selected appears in the **Approval period** section.

c. Select the time icon in the field. A clock window opens.

d. Use the arrows to select a time (in 30 minute increments) or type in a value. Then select the **AM / PM** field if you need to change it, and select **Save**. The time you selected appears in the **Approval period** section.

6. You may have an option to assign one or more tags to a guest, or you may be required to select tags. If your system was set up without any tag assignments, the **Tags** field does not appear.

   If the **Tags** field appears, select the tag(s) associated with the guest. Tags help your administrator categorize guests.

7. In the **Message to guest** field, enter a message to be included in the confirmation notification the guest receives (optional).

   The following characters are not valid for this field:
   !#$^%*()+=\[\]/{}|<>?

8. In the **Company** field, enter the company name of the guest (optional).

   The following characters are not valid for this field:
   !@#$^%*()+=\[\]/{}|:<>?
9. In the **Location** field, enter the physical location of the guest (optional).

- The following characters are not valid for this field:
  `!@#$%^&*()+=\[\]/{}|:<>?

10. In the **Comment** field, enter information about the guest that you may want to refer to in the future (optional).

- The following characters are not valid for this field:
  `!#$^&%*()+=\[\]/{}|<>?

11. Select **Approve**.
2. Select **Browse**.

3. Browse to the location of the guest list file in CSV or TSV format, and select the file. The file path is displayed in the Import field.
   
   If the file you imported contains errors, a detailed list of errors is displayed. For example, in the sample file, row 3 of the imported file contains an invalid email address.
   
   **Row 1 is the header row in the file.**

4. If errors are displayed, open the file, correct the errors, and browse to the file again.

5. To complete the process of importing the list of guests to the portal, select **Import**.

---

**Prepare a Guest List File to Import**

You may need to prepare a file of pre-defined guests to be imported to the portal. The file must be in CSV or TSV format. All information in the file must be valid in order to complete the import.
It is recommended to use the pre-defined `Guest_List_Template.csv` file to prepare the file.

**To work with the file:**

1. Download a guest list template from the Import Guests page.
2. Open the template using an editing tool that is compatible with CSV or TSV format, such as MS Excel.

![Guest List Template](image)

The data in row 2 is an example of guest data.

3. Replace the sample data in row 2 with data of an actual guest. All fields must be valid for the import to succeed. See [To add a guest](#) for more information.

   The following information is required for each guest:
   - Email
   - From Date: YYYY MM DD in the appropriate columns
   - From Time: in 24-hour notation, for example, 13:00 and not 1:00 PM
   - To Date: YYYY MM DD in the appropriate columns
   - To Time: in 24-hour notation, for example, 18:30 and not 6:30 PM
   - Tags (when relevant): case-sensitive, enclosed in quotes and comma-separated

   *If the From Date and Time has passed, it is replaced by the date and time of the file import.*

4. Create up to 250 rows of guests per file.

   *To delete an entire row of the file when using Excel, right-click the row and select Delete. Do not use the keyboard Delete key.*

5. After editing the file, save it in CSV format to a location from which you can import it into the Guest Management Portal. If the data includes letters not in the ISO basic Latin alphabet, the file must be saved as a Unicode Text .txt file or as a UTF-8 encoded file.
Receive Email Requests

When guests request access to your network, they enter your name and email address in a web-based registration form.

Depending on your network requirements, guests may be required to enter additional information.

Your system may be set up so that you receive an email message after guests complete guest registration. The email provides guest request details for network access. A sample is shown below.
These guests appear in the portal with the Pending status.

Receive Email Confirmation

Your system may be set up so that you receive a notification email after you approve, decline or revoke guest network access. The email contains information about the guest, including contact details and network access credentials. If another sponsor has changed the status of a guest assigned to you, you will also receive an email.
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