

Cisco Spaces: Location Personas App

Cisco Spaces enables you to group the customers using tags. You can then use these tags in the Cisco Spaces rules such as Engagement Rules. In Cisco Spaces, you can create tags using the Location Personas app.You can also use the Location Personas app to add more customers to the existing tags, or to remove certain customers from an existing tag. You can group a customer under multiple tags.

When you create a tag, you can use the existing tags to filter the customers from the selected locations. For example, if you want to create a tag with location A and location B, but only for android users, you can use the tag filter to remove the tag for iOS.

- Create or Modify Tags, on page 1
- Use Case: Location Personas Rule (Profile Rule), on page 5
- Managing Location Personas Rules, on page 8
- Location Personas Rule Report, on page 10

Create or Modify Tags

To create a tag, or to include the customers to or exclude the customers from an existing tag, perform the following steps:

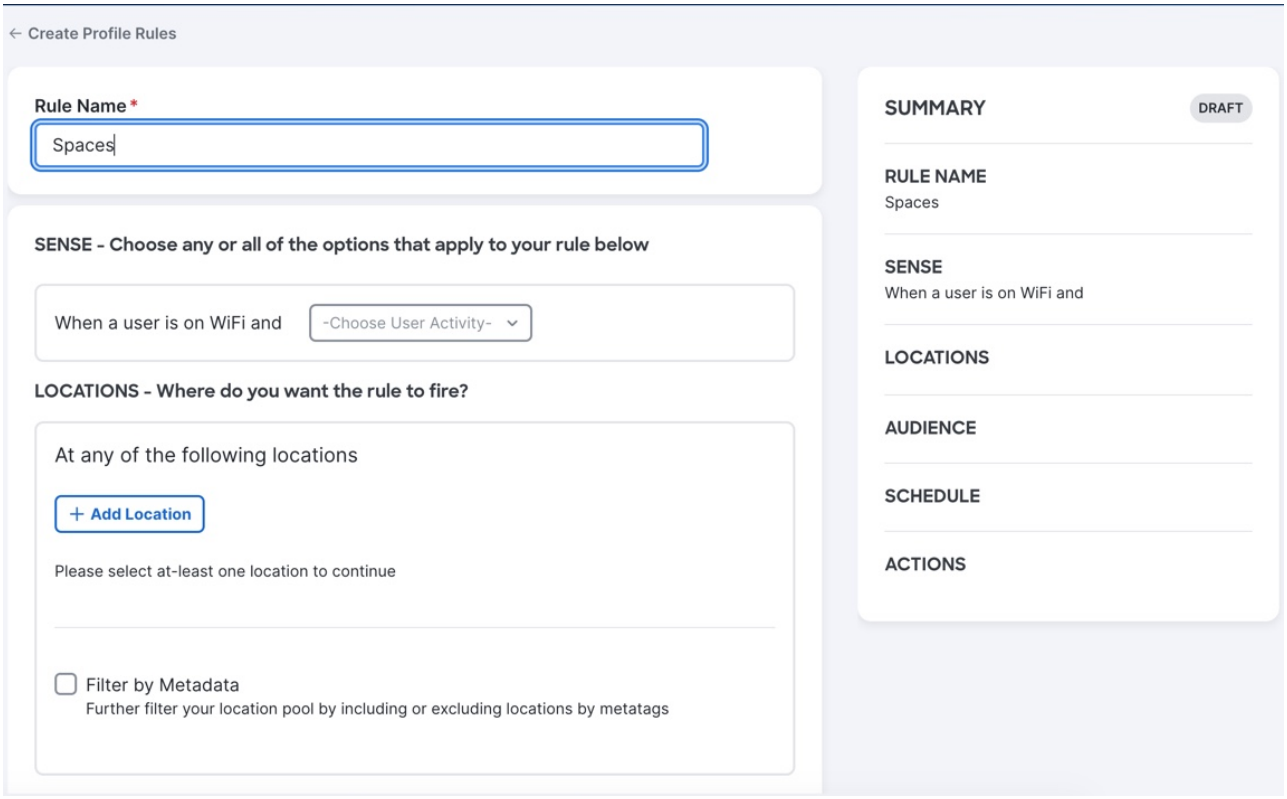
Procedure

Step 1 From the left navigation pane, choose **Dashboard** > **Location Personas**.
The **Location Personas** app is displayed. In the left navigation pane, view three tabs: **Location Personas Rules**, **User Management**, and **Related Links**.

Step 2 In the **Location Personas Rules** tab, click **Create New Rule**.

Step 3 In the **Rule Name** field, enter a name for the Location Personas/Profile rule.

Figure 1: Create Profile Rules



Step 4 From the **When a user is on WiFi and** drop-down list, choose any of the following:

- **Entering a Location**: Choose this option if you want to tag the visitors with Wi-Fi connected, when they enter the location.
- **Away from the Location**: Choose this option if you want to tag the visitors with Wi-Fi connected and are away from the location for a specified time. If you are selecting this option, from the **For** scroll list, choose the number of minutes a visitor needs to be away from the location for tagging based on the this rule.

Note

- The **Exiting Location** option is no more available. If you are editing an existing **Location Personas** rule with **Exiting Location** configured, the **Choose User Activity** drop-down list will appear without any selection. You must choose the required option from the **Choose User Activity** drop-down list to save the rule successfully.
- Even if a visitor is physically present in the location, but gets disconnected from the Wi-Fi for the minutes specified in the **For** scroll list, the visitor will be considered for tagging for this rule.

- **Present at Location**: Choose this option if you want to tag the visitors who are connected to the Wi-Fi and are at present at the location for a specified duration or at a particular time. If you choose this option, additional fields appear where you can mention the duration or time that needs to be met by the visitor to get filtered.

Step 5 In the **LOCATIONS** area, specify the locations of which you want to filter the customers for the rule.

You can choose the entire customer name or single or multiple locations such as group, campus, building, floor, or zone. You can add the locations of both CUWN and Cisco Meraki.

You can again filter the locations based on the metadata defined for the selected location or its parent or child locations. You can either choose the locations with a particular metadata or exclude the locations with a particular metadata. For more information on configuring the location for the profile rule, refer to the Location Filter for a Location Persons Rule, on page 7

Step 6 In the **IDENTIFY** area, specify the type of customers that you want to filter for the rule.



Note You can filter the customers 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 the app in the customer's device. You can apply all these filters or any of them based on your requirement.

To specify the customers whom you want to filter for the rule, perform the following steps:

a) If you want to filter the customers by the Opt In Status, check the **Filter by Opt-In Status** check box, and choose whether you want to filter the opted in users or not opted in users for the rule.



Note For more information on opted in users, refer to the Opted In Option for Users, on page 7.

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



Note You can filter the customers by including or excluding existing tags. You can filter the tags in two different ways. Either you can specify the existing tags of which you want to include the customers for the rule or the existing tags of which you want to exclude the customers for the rule. You can choose the best filtering method based on your requirement. For example, if you want to add the customers of all the existing tags expect one tag, it is easy to opt the exclude option, and mention that particular tag of which you want to exclude the customers.

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

Click the **Add Locations** button. In the **Choose Locations** window, specify the locations of which the customer visit needs to consider for filtering. In the following fields, mention the number of visits and duration required to be met by the customers to be filtered for the rule.

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



Note Only those customers who meet the preceding conditions during the period specified are filtered for the rule.

a) Check 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 profile rule.

b) Check 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 profile rule.
c) If you want the rule to be executed only on particular days, check 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, specify whether you want to create a new tag by including or excluding the customers filtered based on the preceding conditions, or to include or exclude the filtered customers from an existing tag.

a) Click **Add Tags**.

- If you want to add or remove the filtered customers from the existing tags, mention the tags to which you want to include the filtered customers and the tags from which you want to exclude the filtered customers.
  - To add the customers that are filtered based on this profile rule to an existing tag, choose the Add radio button for the tags to which you want to add the customers.
  - To remove the customers that are filtered based on this profile rule from an existing tag, choose the Remove radio button for the tags from which you want to remove the customers.



Note In the **Choose Tags** window, you can search for a tag using the Search option. The tags selected are displayed on the right side of the window.

- If you want to create a new tag with the rule, click the **Create New Tag** button. In the "Enter the tag name" field that appears, enter a name for the tag, and click **Add**. The newly created tag gets listed in the tag list. Choose whether you want to include or exclude the filtered customers from the tag.

b) Click **Done.**.



Note Using a profile rule, you can create a tag by including or excluding the filtered customers, or you can modify an existing tag by including or excluding the filtered customers, simultaneously. You can also create more than one tag for a rule.



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

Step 9 Click **Save and Publish**.

The rule gets published and listed in the Profile Rules page.



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 Publish** button. Also, you can publish the profile rule by clicking the **Make Rule Live** icon at the far right of the rule on the **Location Personas** window.

Use Case: Location Personas Rule (Profile Rule)

ABC hotel group as part of its 25th anniversary wants to provide some special gifts to its platinum loyalty members. ABC considers all the customers who had visited its hotels at location A or location C minimum 10 times in the last 2 years as platinum loyalty members. All the visitors who have connected to the Wi-Fi at least 45 minutes are to consider as customers. ABC wants to create a tag for its platinum loyalty members. The opted in customers who meet the previous conditions within the end of the current month are to add to the tag.

To meet the preceding scenario, perform the following steps:

Procedure

Step 1 Log in to Cisco Spaces.

Step 2 Create the location hierarchy with all the locations of ABC.

Step 3 From the left navigation pane, choose **Dashboard** > **Location Personas**.

Step 4 In the **Location Personas Rules** tab, click **Create New Rule**.

Step 5 In the **Rule Name** field, enter a name for the profile rule.

Step 6 From the **When a user is on WiFi and** drop-down list, choose **Present at Location,**, and from the drop-down list that appears, choose **45** Minutes.

Step 7 In the **LOCATIONS** area, click the **Add Locations** button, then select location A and location C.

Step 8 Click **Done**.

Step 9 In the **IDENTIFY** area, do the following:

a) Check the **Filter by Opt-In Status** check box, and choose **Only for opted-in Visitor**.
b) Check the **Filter by Previous Visits** check box, and click the **Add Locations** button, and add Location A, and Location C.
c) In the following fields, choose **At least**, **10** times in, and **Date Range**, respectively.
d) In the date range fields, enter the start date and end date for the last two years.

Step 10 In the **SCHEDULE** area, check 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 the current month.

Step 11 In the **ACTIONS** area, do the following:

a) Click the **Add Tags** button.
b) In the **Create Tags** window, Click **Create New Tag**.
c) In the **Enter the tag name** field, enter **Platinum1**, and click **Add**. In the Tag list, click the **Include** radio button for Platinum1, and click **Done**.

Step 12 Click **Save and Publish**.

The profile rule is published.

Filter by Tag

You can either opt to include or exclude the tags for filtering.

Including a Tag

To include a tag, perform the following steps:

Procedure

Step 1 In the **Filter by Tags** area of the proximity rule (captive portal rule, engagement rule, profile rule), click the **Add Tags** button for **Include**.

Step 2 In the **Choose Tags** window, click the **Include** radio button for the tag that you want to include.

Step 3 Click **Done**.

Excluding a Tag

To exclude a tag, perform the following steps:

Procedure

Step 1 In the **Filter by Tags** area of the proximity rule (captive portal rule, engagement rule, profile rule), click the **Add Tags** button for **Exclude**.

Step 2 In the **Choose Tags** window, click the **Exclude** radio button for the tag that you want to exclude.

Step 3 Click **Done**.

Search for a Tag

To search for a tag, perform the following steps:

Procedure

Step 1 In the window to create a new rule, in the Filter by Tags area, click the **Add Tags** button for Include or Exclude.

Step 2 In the **Choose Tags** window, enter the name of the tag that you want to search.

The tag list gets filtered with the search results.

Clearing a Tag

If you choose an include or exclude radio button for a tag, you can clear the selection using the **Clear Selection** option for that tag.

Opted In Option for Users

Cisco Spaces enables you to provide an option in the captive portal for the customers to opt out from the notification subscriptions.

In the portal, check the **Allow users to opt in to receive message** check box to provide an option for the customers to opt for the subscriptions. The option **Allow users to opt in to receive message** is available for the authentication types **SMS with password verification** or **Email**.

By default, the customers are opted in for subscription. The customers can opt out from subscription when accessing the captive portal. When a customer accesses the captive portal by connecting to an SSID, the opt in check box is displayed to the customer.

Location Filter for a Location Persons Rule

To specify the locations, perform the following steps:

1. Click the **Add Locations** button.
2. In the **Choose Location** window that appears, select the locations for the profile rule.
3. Click **Done**.

You can again filter the locations using the metadata defined for the locations. Only the metadata defined for the selected locations and their parent or child locations will be available for selection.

To include a locations with a particular meta data, perform the following steps:

Procedure

Step 1 Select the **Filter by Metadata** check box.

Step 2 In the Filter area, click the **Add Metadata** button.

The **Choose Location Metadata** window appears.

Step 3 From the drop-down list, choose the metadata variable, and choose the value for the variable in the adjacent field.

Step 4 Click **Done**.

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

Procedure

Step 1 Select the **Filter by Metadata** check box.

Step 2 In the Exclude area, click the **Add Metadata** button.

The **Choose Location Metadata** window appears.

Step 3 From the drop-down list, choose the metadata variable, and choose the value for the variable in the adjacent field.

Step 4 Click **Done**.

Managing Location Personas Rules

You can pause a Location Personas (Profile) Rule and make it live again, whenever required. You can modify a Location Personas rule, and delete it if required. You can create Location Personas rules specific to a location, and view them from the location hierarchy.

Pausing a Location Personas Rule

To pause a Location Personas rule, perform the following steps:

Procedure

Step 1 In the Cisco Spaces dashboard, click **Location Personas**.

The **Location Personas** window appears with all the existing Location Personas rules.

Step 2 Click the **Pause Rule** icon that appears at the far right of the Location Personas rule that you want to pause.

The Location Personas rule is paused.

What to do next

To pause multiple Location Personas rules, check the check box for the Location Personas rules that you want to pause, and from the **More Actions** drop-down list at the top of the window, select **Pause**.

Restarting a Location Personas Rule

To restart a Location Personas rule, perform the following steps:

Procedure

Step 1 In the Cisco Spaces dashboard, click **Location Personas**.

The **Location Personas** window appears with all the existing Location Personas rules.

Step 2 Click the **Make Rule Live** icon that appears at the far right of the Location Personas rule that you want to restart.

The Location Personas rule is restarted.

What to do next

To restart multiple Location Personas rules, check the check box for the Location Personas rules that you want to restart, and from the **More Actions** drop-down list at the top of the window, select **Make Live**.

Modifying a Location Personas Rule

To modify a Location Personas rule, perform the following steps:

Procedure

Step 1 In the Cisco Spaces dashboard, click **Location Personas**.

The **Location Personas** window appears with all the existing Location Personas rules.

Step 2 Click the **Edit Rule** icon for the Location Personas rule that you want to modify.

Step 3 Make necessary changes.

Step 4 To save the changes, click **Save** or to publish the changes, click **Save and Publish**.

Note A live rule will have only the **Save and Publish** option. When you click the **Save and Publish** button, the rule gets published with the changes.

Deleting a Location Personas Rule

To delete a Location Personas rule, perform the following steps:

Procedure

Step 1 In the Cisco Spaces dashboard, click **Location Personas**.

The **Location Personas** window appears with all the existing Location Personas rules.

Step 2 Click the **Delete Rule** icon that appears at the far right of the Location Personas rule that you want to delete.

What to do next

To delete multiple Location Personas rules, check the check box for the Location Personas rules that you want to delete, and from the **More Actions** drop-down list at the top of the window, select **Delete**.

Viewing a Location Personas Rule for a Location

To view a Location Personas rule for a location such as group, building, floor, and so on, perform the following steps:

Procedure

Step 1 Click the three-line menu icon at the top-left of the Cisco Spaces dashboard.

Step 2 Choose **Location Hierarchy**.

The **Locations** window appears with the location hierarchy.

Step 3 Click the location for which you want to view the Location Personas rule.

Step 4 Click the **Rules** tab.

Step 5 Click the **Profile Rule** tab.

The Location Personas rules for the location gets listed.

What to do next

Note You can also access the **Rules** tab by clicking the **Rules** link that appears for each location in the location hierarchy. The **Rules** link for a location is enabled only if at least one proximity rule exists for that location.

Location Personas Rule Report

The Location Personas Rule report shows the performance of Location Personas rules. It is specific to a Location Personas rule.

To view the Location Personas (Profile) Rule report for a Location Personas rule, perform the following steps:

Procedure

Step 1 In the Cisco Spaces dashboard, click **Location Personas**.

The **Location Personas** window appears with all the existing Location Personas rules.

Step 2 Click the rule for which you want to the Location Personas Rule Report.

Step 3 In the Filter area, choose the period for which you want to view the report.

- **Total Devices Tagged**—The total number of devices tagged for the Location Personas rule from the day on which the Location Personas rule is created.

- **Total Users Tagged**—The total number of visitors tagged for the particular Location Personas rule from the day on which the Location Personas rule is created.
- **Total Tags Removed**—The total number of visitors removed from the tags mentioned in the Location Personas rule from the day on which Location Personas rule is created.

Rule Activity

This section displays the number of customers and devices tagged based on the particular Location Personas rule during the specified period.

- **Tagging Trends**—Displays the total number of devices and customers tagged for the particular rule during the specified period. Also displays the number the customers removed from the tags based on the particular Location Personas rule. The line graph represents the total number of tags added or removed on each day of the specified period. If the duration specified is less than a week, the data will be shown in a bar graph. If the duration specified is not more that 2 days, the graph displays the number of customers tagged at various timings of each day.
- **Tags Added**—Displays the total number of tags created for the rule.
- **Device Tags added by Location**—Displays the number of devices tagged from each location during the specified period.
- **Tags Removed by Location**—This section will be displayed only if it is specified in the Location Personas rule to remove the filtered devices from a particular tag. The total number of devices untagged from each location based on the particular Location Personas rule during the particular period is shown.
- **Tagging by Time of Day**—This bar graph displays the number of customers added to various tags based on the Location Personas rule, at various timings of a day, during the specified period. This helps in identifying the time at which the customers targeted by this rule visits the targeted locations the most.