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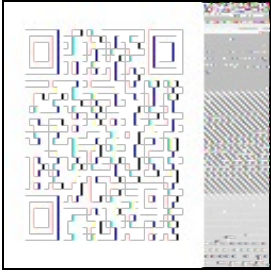
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## 1 QR Code Provision

## 2 Overview

Swivel version 3.10.4 onwards supports provision of a Mobile Client [Mobile Provision Code](#) contained within a QR Code. The QR code can be provided in a number of ways:

- Within an Email
- Within a web page, such as a link in an email
- Through the [User Portal](#) (latest User Portal is required)



The Provision code lasts until a Provision attempt is made or the Provision Code Validity is exceeded, see [Mobile Provision Code](#).

### 3 Prerequisites

Swivel 3.10.4

[User Portal](#)

Mobile Phone Client 2.1.1 onwards

Mobile Phone/tablet with camera

Valid certificate (or non SSL connection) or mail client may block QR image

## 4 QR Code Setup

To setup QR Code provisioning, on the Swivel Administration console, select Policy, then Self Reset and enter the URL of the User Portal page in the **QR Code URL**:, if this is not present then it may be an older version and require upgrading to Swivel version 3.10.4 or later. The format for an appliance is:

```
https://Public_IP:8443/userportal/getQRCode?text=
```

### 4.1 Transport Configuration

To send QR Codes by email ensure that HTML is enabled

The QR code url is placed in the message by replacing the phrase url4

So to include the QR code in the HTML email included

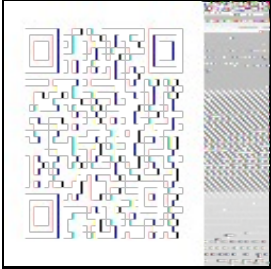
```
<img src=url4>
```

## 5 Testing

The QR Code should generated when sent by email to a user.

### 5.1 Provisioning a Mobile Client

Following the [Provision URL](#) links will automatically provision a Mobile Phone Client. To use the QR code, on the Swivel Mobile Phone Client, click on the Information 'i' icon then, About and tap on the **Scan QR Code** link to start the QR code scanner. Hold Mobile Phone so visible area of the scanner so that it contains the QR Code and wait until it recognises it. The Mobile Client should then be provisioned.



## 6 Known Issues

## 7 Troubleshooting

### 7.1 Error Messages

#### Error Server, Unknown Server ID

The **Site ID** may not exist or may not have been entered.

#### Error Server Connection

The server details are missing or incorrect

#### Invalid Username

The User may not exist on the Swivel server.

#### Invalid Provision Code

The provision code is not valid or has already been used.

#### Error Dowloading Security Strings

The user may not be a member of an appropriate group with Mobile Client authentication enabled

#### Reprovision URL not retrieved

This can occur in the User Portal on a QR Code request if the user has been removed



## **8 Mobile Client Policies**

## 9 Mobile Client Policy Overview

From Swivel 3.9.4 onwards the Swivel Mobile client can be configured with server settings that will be applied to all Mobile Clients.

This document supplements the existing documents for individual phone types.

Policy changes made on the server are applied to the clients when they provision the device or request new security strings.

## 10 Requirements

Swivel Mobile Client that supports PINsafe 3.8 or higher provisioning

Older Swivel appliances (2.0.12 and earlier) will need their proxy upgrade to handle the provisioning, see [Appliance Proxy Server Upgrade](#)

# 11 Swivel Configuration

## 11.1 Mobile Provisioning

Swivel 3.9.4 can be configured to allow users to enter a PIN for an automatic PIN extraction. On the Swivel Administration console select Policy/Mobile Client, the following options are available:

**Allow user to enter PIN:** Options Yes/No, Default No. If set to No, the user is not prompted to enter a PIN. If set to Yes, the user will be prompted to enter their PIN and will then be presented with a One Time Code.

**Allow user to choose how to extract OTC:** Options Yes/No, Default No. If set to No, the user cannot choose between automatic or manual PIN extraction. If set to Yes, then the user may choose the PIN extraction type on the Mobile client.

**Allow user to browse strings:** Options Yes/No, Default No. Version 3.9.6 onwards. This option allows the Mobile Phone App user to browse through the security strings. Availability to this feature is server controlled.

### Policy>Mobile Client

Set the polices to be downloaded to mobile clients

Allow user to enter PIN:

Yes ▾

Allow user to choose how to extract OTC:

Yes ▾

Allow user to browse strings:

Yes ▾

Apply

Reset

## 12 Error Messages

## **13 Mobile Client Policies 2.0**

## 14 Mobile Client Policy Overview

From Swivel 3.9.4 onwards the Swivel Mobile client can be configured with server settings that will be applied to all Mobile Clients.

This document supplements the existing documents for individual phone types.

Policy changes made on the server are applied to the clients when they provision the device or request new security strings.

## 15 Requirements

Swivel Mobile Client 2.0 that supports Swivel 3.10 or higher provisioning



## 16 Swivel Configuration

### 16.1 Mobile Provisioning

Swivel 3.10 has extended the mobile policies to allow the following policies to be set on a 2.0 mobile client.

**Provision is numeric:** Options Yes/No, Default No. If set to No, the keyboard type that will be displayed to the user on the mobile when entering a provision number will be alphanumeric. If set to YES then the keyboard type will be numeric.

**Sync Index:** Option Yes/No, Default No. Swivel version 3.10.3 onwards. This setting allows the mobile client to connect to the server to determine the next index code to be used. If set to Yes, when Swivel detects an authentication from the mobile client, it will allow the user to select the next [Security String](#) or [OTC](#). If the index has not increased then the user will not be able to select the next code. If the Swivel server is not contactable, it will allow the user to browse their security strings.

**Support Email Address:** Option text, Default empty. If an email address is set, the user will be shown an option under the help section to contact support via email. The email is populated automatically and set in the users default mail client.

**Support Phone Number:** Option text, Default empty. If a phone number is set, the user will be shown an option under the help section to call customer support. The number is populated automatically and set in the users dialer ready to call.

**VPN URL Scheme: Only For Iphone** Option text, Default empty. If a VPN client is set, the user will be shown a VPN button on the OTC page. The VPN button will launch the mobile VPN client only if one is installed and supports the URL Scheme protocol.

### Policy>Mobile Client

Set the polices to be downloaded to mobile clients

Allow user to enter PIN:	Yes ▾
Allow user to choose how to extract OTC:	Yes ▾
Allow user to browse strings:	Yes ▾
Provision is numeric:	Yes ▾
Support Email Address:	<input type="text" value="syed4@gmail.com"/>
Support Phone Number:	<input type="text" value="07905325768"/>
VPN URL Scheme:	<input type="text" value="citrixreceiver://auth?co"/>

## 17 Messages

Pre Swivel 3.10 Users should still refer to the existing mobile client documentation [Mobile Client Policies](#)

## 18 Mobile Provision Code

# 19 Mobile Provision Code Overview

## 19.1 Swivel Core Version information

### 19.1.1 Swivel version 3.10.4

[QR Code Provision](#)

#### 19.1.1.1 Swivel version 3.10

Swivel version 3.10 onwards supports one step Mobile Client Provisioning using a [Provision URL](#) and a [Site ID](#).

#### 19.1.1.2 Swivel version 3.8

From Swivel 3.8 onwards the Swivel Mobile client must be provisioned to allow the Mobile client to download security strings for a user. The advantages of this are:

- A user cannot download another persons security strings
- Provisioning a mobile device prevents a user from downloading security strings to another device without being provisioned.

Each username may have one Mobile Client Provisioned. A request to provision a new mobile device or re-provision an existing mobile device that reaches the Swivel server will invalidate the current security strings. This article explains how to provision or re-provision a Swivel Mobile client.

This document supplements the existing documents for individual phone types.

For information on how a user can self provision or request a new provision code see [Mobile Re-Provision How to Guide](#)

## 20 Requirements

Supported [Mobile device](#)

Swivel Mobile Client installed that supports Swivel 3.8 or higher provisioning, see [Mobile Phone Client](#)

Swivel appliances will need their proxy upgrade to handle the provisioning, see [Appliance Proxy Server Upgrade](#)

If a Swivel cluster is configured with multiple servers, then session sharing should be enabled, otherwise the provision code is stored in memory and only valid on the Swivel instance that it is generated.

Ensure Provision code settings are configured across multiple Swivel instances.

### 20.1 Swivel Configuration

#### 20.1.1 Mobile Provisioning

Swivel 3.8 and higher requires each mobile phone to be provisioned so it can be uniquely identified. Ensure that all Mobile Client users have suitable Transports configured to receive their Provision Code. To provision the mobile client on the Swivel Administration Console select User Management, locate the required user, click on the user to reveal the management functions and click Reprovision. The code sent to the user is valid for a length of time set under: Swivel Administration Console select Policy/Self-Reset. Earlier versions of Swivel do not need to use a Mobile Provision. From version 3.9.7 the user is sent a [Provision URL](#).



On the Swivel Administration Console log a message should indicate that the Mobile Provision Code has been successfully sent to the user:

**Message sent to user: username, destination: username@emailaddress.com.**

**User "username" can now reprovision their mobile device.**

**Message added to message queue for user: username, destination: username@emailaddress.com.**

**Provision code created for user "username"**

### 20.2 Mobile Self Provisioning

A user can be permitted to provision their own mobile device. To allow this, on the Swivel Administration Console select Policy/Self-Reset then set the following parameters as required:

**Allow user self-provision of mobile client:** Default No, Options Yes/No

**Log device information when provisioning:** Default No, Options Yes/No

**Provision Code Validity period (seconds):** Default 600, Options 10-1000000 Note: this value is for all Mobile Provision Codes.

To configure the self Provision/Re-provision see the [Mobile Re-Provision How to Guide](#)

### 20.3 Obtaining a Provision code using the Self Provisioning feature

A user should be able to access the Provision page of either the [User Portal](#) or from the resetPIN utility using <https://ApplianceIP:8443/reset/provision.jsp>. From version 3.9.7 this can be sent as a [Provision URL](#).

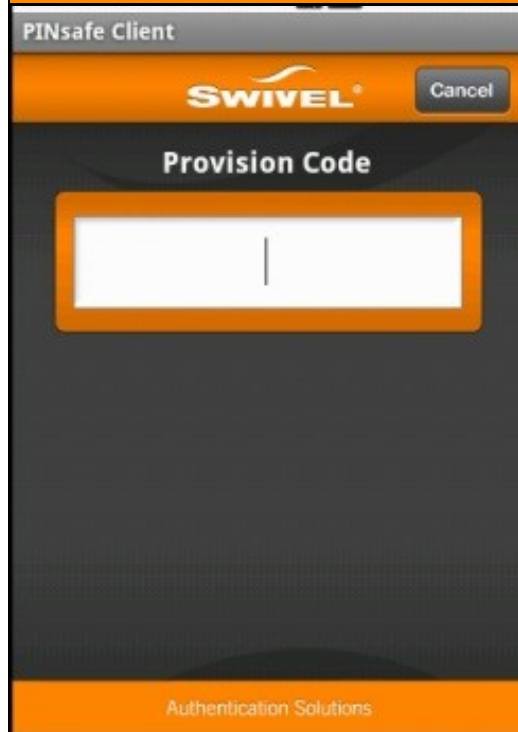
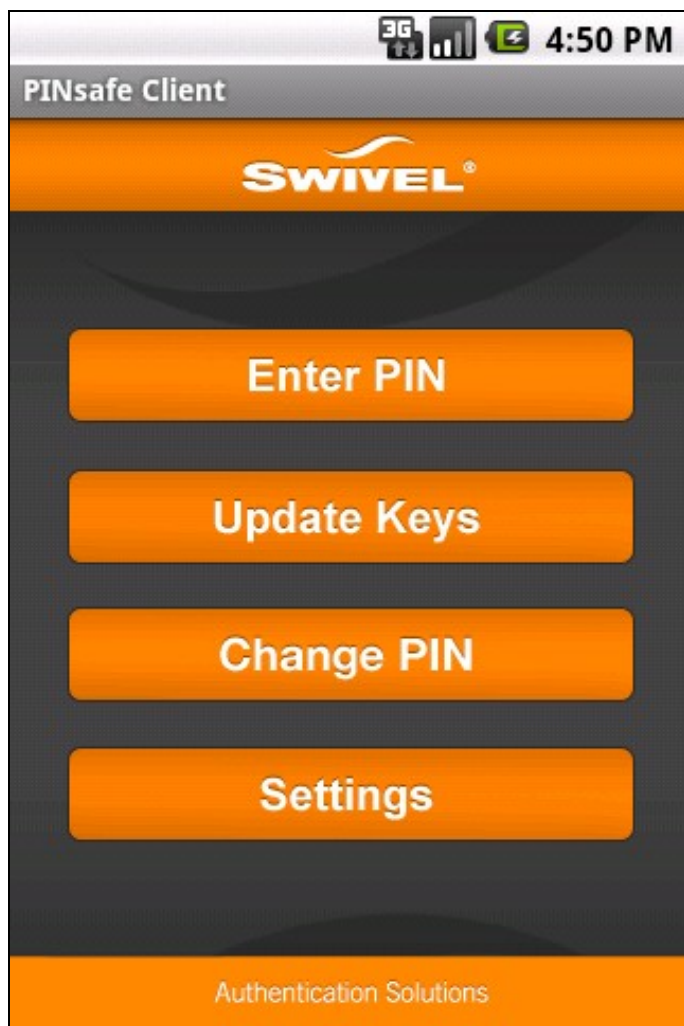
### 20.4 Mobile Client Configuration

If a [SSD](#) has been configured then the settings can be automatically pulled from the Swivel server, together with any [Mobile Client Policies](#).

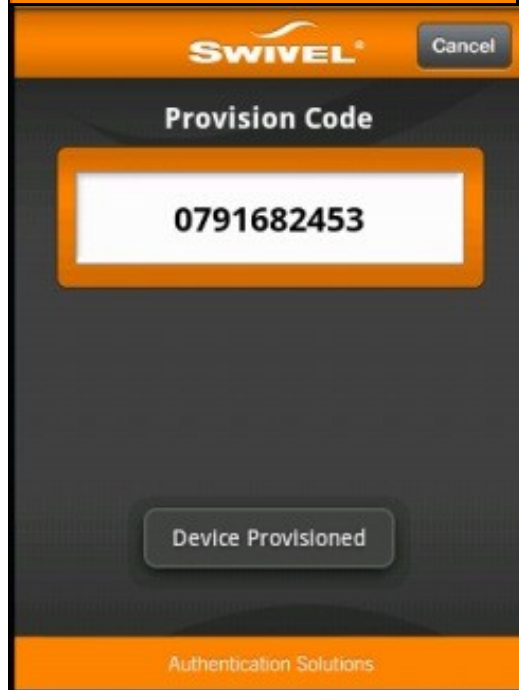
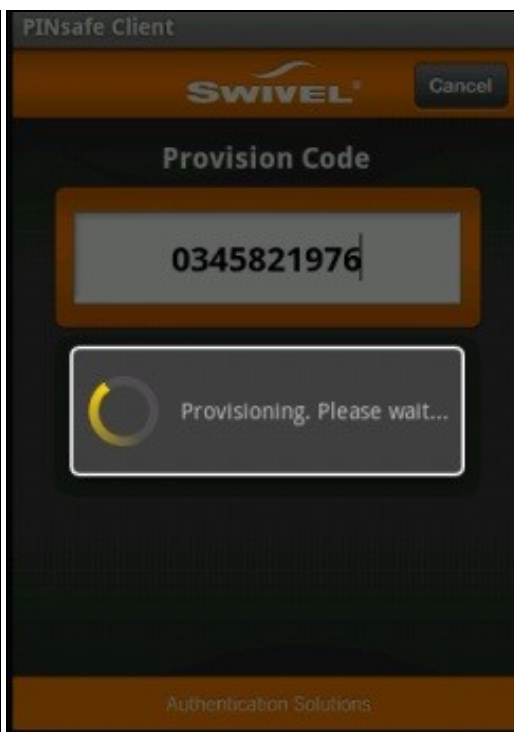
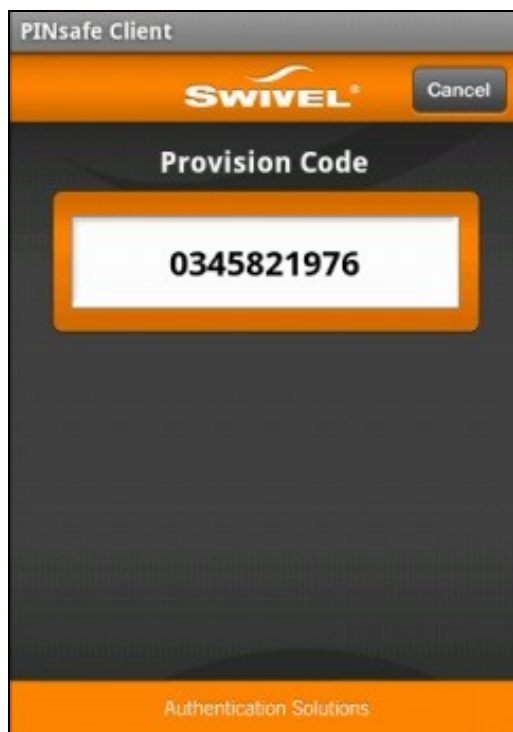
Mobile clients may have some variation.

Note: Re-Provisioning a mobile client will invalidate the current security strings for the client.

From the Swivel Mobile Client select settings, then select Re-Provision. A text box should appear to enter the Mobile Provision Code.



Enter the Mobile Provision Code and observe the screen input for a *Provisioning. Please wait...* message. When complete a *Device Provisioned* message briefly appears on the screen.



## 21 Verify Device Provisioning

On the Swivel Administration console, check the logs for a provisioning message:

**User "gfield" provisioned successfully**



## 22 Error Messages

### Error Server, Unknown Server ID

The **Site ID** may not exist or may not have been entered.

### Error Server Connection

The server details are missing or incorrect

### Invalid Username

The User may not exist on the Swivel server.

### Invalid Provision Code

The provision code is not valid or has already been used.

### User not set

No username has been entered under options. Enter the username and retry.

### Error Downloading Security Strings

The user may not be a member of an appropriate group with Mobile Client authentication enabled

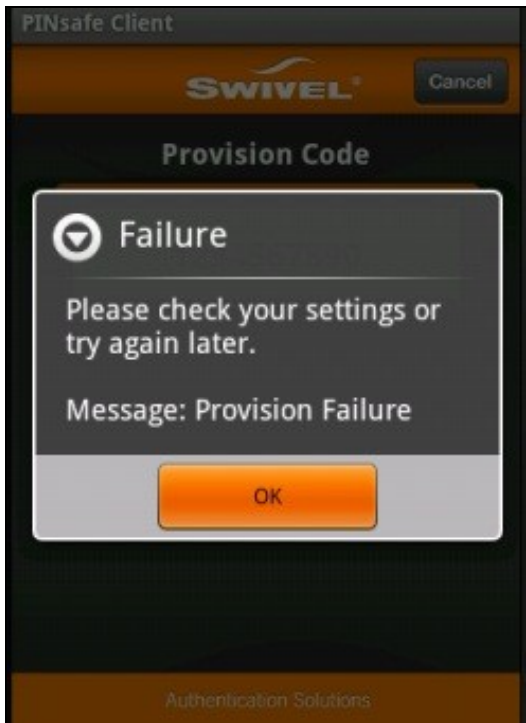
### Failure Please check your settings or try again later. Message: Provision Failure

The following log message may be seen in the Swivel Administration Console:

User "gfield" provision failed, A valid session could not be loaded or created for the user.

This can be caused by an incorrect Mobile Provision Code, or the time allowed for provisioning a device has been exceeded.

Note: The security strings on the mobile phone will be invalid until a successful provision is carried out and a new set of security strings are downloaded.



**AgentXML request failed, error: No suitable authentication method for the user "qwerty" was found. The user may be missing from the user repository or a synchronisation has not yet occurred.**

or

### Mobile request from unknown user; the user needs to reprovision

A Mobile Provision Code was entered for a user who is not present on the Swivel user database.