Cisco Software: Smart Account Creation and Setup

Customers

Software Training Curriculum for Customers

Activity	Time	Role Description	Managing Application
Cisco Software: Capability Overview for Customers	45 minutes	• All Customer Roles	N/A
Cisco Software: Smart Account Create and Setup for Customers	1 hour	• All Customer Roles involved with Smart Accounts as Admins and Users	Cisco Software Central (CSC)
Cisco Software: Smart Account Administration for Customers	1 hour	• All Customer Roles involved with Smart Accounts as Admins and Users	Cisco Software Central (CSC)
Cisco Software: Smart Licensing Management with Smart Accounts	1 hour	• Software license and purchasing approver • License administration and management	Smart Software Manager (SSM)
Cisco Software: Classic Licensing Management with Smart Accounts	30 minutes	• Software license and purchasing approver • License administration and management	License Registration Portal (LRP)
Cisco Software: EA Workspace	1 hour	• EA Management	EA Workspace

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Learn About

- How to Get a Smart Account in Cisco Software Central (CSC)
- How to Setup your Smart Account in Cisco Software Central (CSC)
- How to Get Access to an Existing Smart Account

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Agenda

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Smart Account Types

What is a Smart Account?

Customer Smart Account

- Where licenses are deposited and managed
- Can be managed by customer directly, designated VAR or authorized party through SSM or LRP
- Account Administrators – manages users access and privileges
- Administrator of account can view and make changes to licenses, review logs, track purchases, etc.

- Virtual Accounts
- (Organize by business unit, product type, geo, etc.)
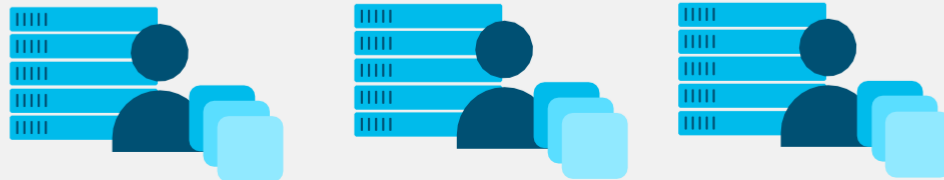
Virtual Accounts
Create Asset Pools with your Smart Accounts using Virtual Accounts

Customer
Smart Account

Virtual Accounts
(Organize by business unit, product type, geo, etc.)

BU 1

BU 2

BU 3
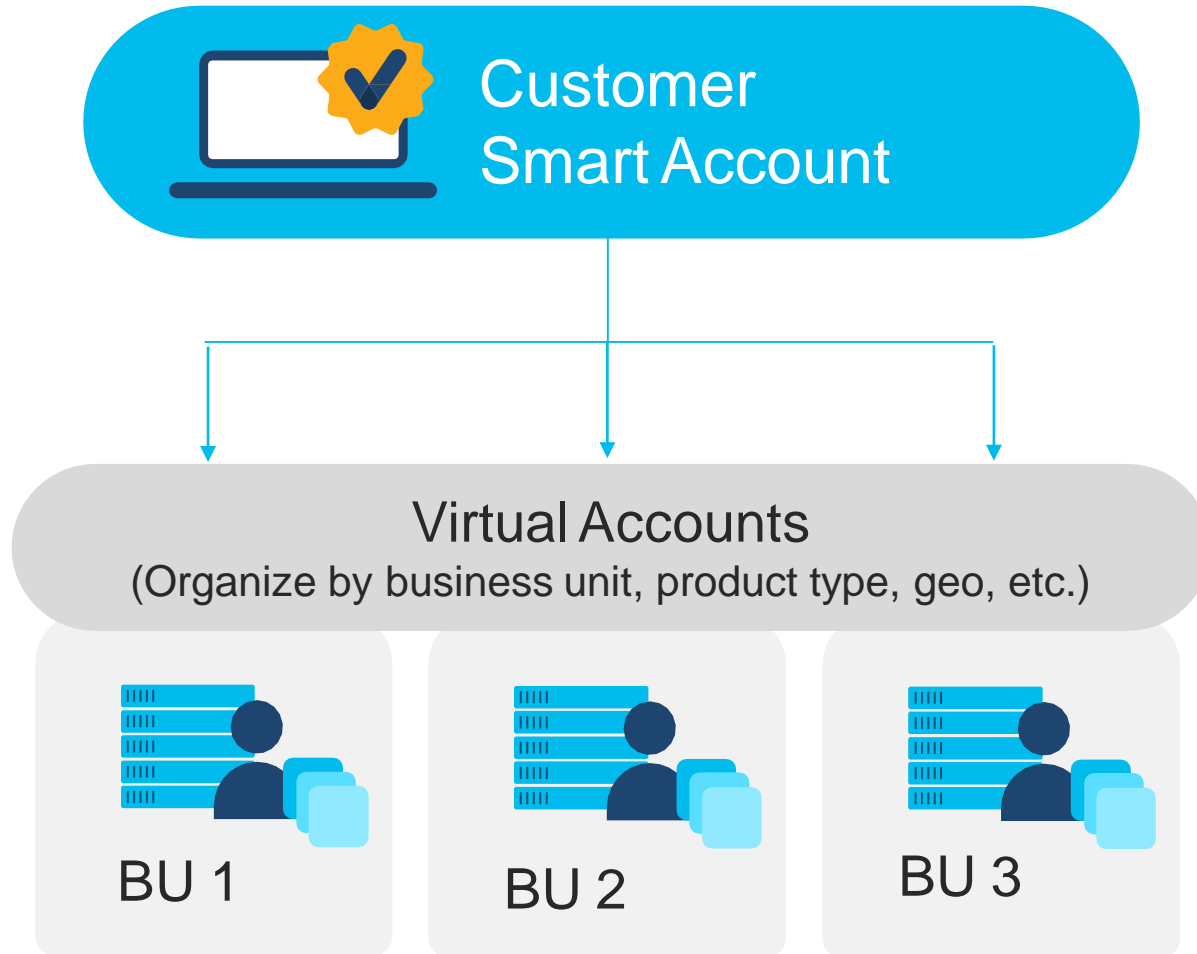
- Organize your licenses the way
- you want with Virtual Accounts

- Virtual Accounts can be set up by business unit, product, geography or other destination – you decide what works best for your organization.

- **The result**: Better utilization and
- more efficient planning.

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How to get a Smart Account

Get a Smart Account

1. Go to Cisco Software Central – software.cisco.com

2. Select "create account" and complete the steps

3. Automatic email is sent to Customer SA administrator

Get access to an existing SA

1. Go to Cisco Software Central – software.cisco.com

2. Select "submit request"

3. Enter Domain to notify SA Administrators

Access Smart Licensing, Classic PAK Licensing & Enterprise Notification Licensing through Cisco Software Central (https://software.cisco.com)

Get a Smart Account

Cisco Software Central (CSC)
Create a Smart Account

1 Access the new Software Portal: Cisco Software Central (CSC) – software.cisco.com

2 Go to **Smart Licensing** and then click on **Create Account.**

Smart Licensing

Cisco Smart Licensing is a flexible licensing model that streamlines how you activate and manage software.

For customers

Existing account	New account	Account administration
Start by getting access to your company's existing Smart Account.	Don't have an account? Create one now.	Update information and manage your users.
Submit request >	**2** Create account >	Manage account >
Smart Software Manager	Network Plug and Play	Delegate an account
Convert classic to Smart Licenses.	Automate device discovery and activation on-prem or from the cloud.	Request an account for your company and delegate another administrator.
Manage licenses >	Manage devices >	Request account >

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Cisco Software Central (CSC)
Create a Smart Account

1 from the **Cisco ID**.

2 There will be a space to update profile in another window.

3 (Optional) You can edit the **Account Name** and **Account Domain** prefix which will be used to identify the account.

4 (Optional) A Pop-up will appear allowing to **Edit Account Domain**.

4.1 1) Option will show:
-Add a Prefix to the Domain:
a) Which you will be able to add a new prefix.
b) Add a note to Cisco Approver

4.2 2) Option will show:
-Use a Different Domain
a) Change the Account Domain
b) Add a Note to Cisco Approver

5 Click "Create Account" Button

4.1 Edit Account Domain ✕

Each account must have a unique domain.
There are two options for editing the domain.
Option:
Add a Prefix to the Domain
You can add a prefix to the domain in order to make it unique. This will have to be approved by Cisco.
* Prefix: .cisco.com
* Note to Cisco Approver:
10 character minimum   655 remaining
Sent to a Cisco support agent for approval
Ok   Cancel

4.2 Edit Account Domain ✕

Each account must have a unique domain.
There are two options for editing the domain.
Option:
Use a Different Domain
You can choose a different domain, as long as it isn't in use. This will have to be approved by Cisco.
* Account Domain:
For example, "cisco.com"
* Note to Cisco Approver:
10 character minimum   1000 remaining
Sent to a Cisco support agent for approval
Ok   Cancel

1 Create a Smart Account

Create a Smart Account so your organization can use Smart Licensing, and to organize your Cisco assets.

Confirm Your Cisco Profile Info

The account will be associated to your Cisco.com profile.
Please confirm that it is up to date:

Full Name: Andrew George Blair
Email Address: andrewgb@cisco.com
Cisco ID: andrewgb
Phone: 0
Organization: Cisco Systems, Inc.
Address: NO ADDRESS LINE1, 0, 0, 0, UNITED STATES

2 Update Profile

Choose an Account Name and Address

Please provide the name, domain and address for the account.

* Account Name: Cisco Systems, Inc.
* Account Domain: cisco.com Edit
This identifier is used to uniquely identify the account.
Organization   CISCO SYSTEMS INC
Headquarters: 170 W TASMAN DR, SAN JOSE, CA 95134, UNITED STATES Edit

5 Create Account   Cancel

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Cisco Software Central (CSC)
Create a Smart Account- Edit Account Headquarters

1 If needed you can Edit the Account Headquarters

2 Select any of the prepopulated options

OR.

3 Search for them via the specified parameters. (Organization, Address, City etc.) Click on "OK" Button.

Cisco Software Central (CSC)
Create Customer Smart Account – Matching existing account

(Optional)

Smart Account Creation: Matching Existing Account

If the account name and domain matches with an existing account, you will be displayed the existing account that you can Create access to.

❶ Select "**Create Access to an Existing Account**" Option.

❷ Search for Account via "**Account, System**, or **Organization Address**"

❸ Select the correct **Organization's Account.**

❹ Add notes for the approver to know

❺ Click the "**Send Create**" Button.

An Account Already Exists at this Domain

A Smart Account that is pending approval already exists at the domain "cisco.com".
Each account must have a unique domain.
If you know who has requested that account, you can ask them to give you access to it when it is activated.
Or you can choose a different domain, as long as it isn't in use.
This will have to be approved by Cisco.
If you need assistance with this issue, please open a case.

Option:

❶ Request Access to an Existing Account

Rather than create a new account you can use an existing one.
This will have to be approved by the administrator of the account.

Account	Domain	Organization
Search	Search	Search
○ Cisco Demo Customer Smart Account	demo.cisco.com	CISCO SYSTEMS INC 170 W TASMAN DR SAN JOSE, CA, UNITED STATES
○ Security Cisco Systems, Inc.	sbg.cisco.com	CISCO SYSTEMS INC 170 W TASMAN DR SAN JOSE, CA, UNITED STATES
○ Sterling River	eodb3.cisco.com	CISCO SYSTEMS INC 2348 LIDA DR MOUNTAIN VIEW, CA, UNITED STATES

❹ * Note to Approver:

10 character minimum   655 remaining

Sent to the administrator of the account for approval

❺ Send Request   Cancel

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Cisco Software Central (CSC)
Create Customer Smart Account- Completion

1 Complete account creation by clicking on the "Create Account" Button.

Create a Smart Account

Create a Smart Account so your organization can use Smart Licensing, and to organize your Cisco assets.

Confirm Your Cisco Profile Info

The account will be associated to your Cisco.com profile.
Please confirm that it is up to date:

Full Name:	Andrew George Blair
Email Address:	andrewgb@cisco.com
Cisco ID:	andrewgb
Phone:	0
Organization:	Cisco Systems, Inc.
Address:	NO ADDRESS LINE1, 0, 0, 0, UNITED STATES

Update Profile

Choose an Account Name and Address

Please provide the name, domain and address for the account.

* Account Name:	Cisco Systems, Inc.
* Account Domain:	cisco.com Edit
	This identifier is used to uniquely identify the account.
Organization	CISCO SYSTEMS INC
Headquarters:	170 W TASMAN DR, SAN JOSE, CA 95134, UNITED STATES Edit

1 Create Account   Cancel

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Cisco Software Central (CSC)
Create Customer Smart Account- Self Error

1 When you click on Create Account in the Create a Smart Account view, a Review Request window will appear.

2 When you click Send Request and have any variations of 'Self' in the Account Name, you will see an error message and resolution guidance.

Cisco Software Central > Create a Smart Account

Create a Smart Account

Create a Smart Account so your organization can use Smart Licensing, and to organize your Cisco assets.

Confirm Your Cisco Profile Info

The account will be associated to your Cisco.com profile.
Please confirm that it is up to date:

Full Name:	Daren Fong
Email Address:	sslmuattester7@q3uatfy18.com
Cisco ID:	sslmuattester7
Phone:	+1 1 40094567890
Organization:	NO COMPANY-SELF
Address:	NOT FOUND IN SOURCE SYSTEM, UNITED STATES

Update Profile

Choose an Account Name and Address

Please provide the name, domain and address for the account.

* Account Name:	NO COMPANY-SELF
* Account Domain:	q3uatfy18.com Edit
	This identifier is used to uniquely identify the account.
Organization	NO COMPANY-SELF
Headquarters:	NOT FOUND IN SOURCE SYSTEM, UNITED STATES Edit

1 Create Account   Cancel

My Account
Daren Fong
NO COMPANY-SELF
sslmuattester7@q3uatfy18.com

Logout

Manage Profile

Review Request

Please review the request before it is submitted.

Name:	NO COMPANY-SELF
Domain:	SelfSA1.q3uatfy18.com
Address:	NOT FOUND IN SOURCE SYSTEM
City:	
State:	
Zip/Postal:	
Country:	UNITED STATES
Note:	please approve

2 Send Request   Cancel

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Cisco Software Central (CSC)
Create Customer Smart Account- Self Error

1 The error and resolution messaging discusses the core issue, as well as resolution.

2 Users can now update their profile by clicking on 'Update Cisco.com Profile'.

Error Message: *"The Smart Account that you are creating will be associated to your Cisco.com profile. The account can't be created at this time because your profile information is not complete. Please update your profile and provide a valid name and address for your company or organization. After you have updated your profile, return to this page to complete the account activation."*

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Cisco Software Central (CSC)
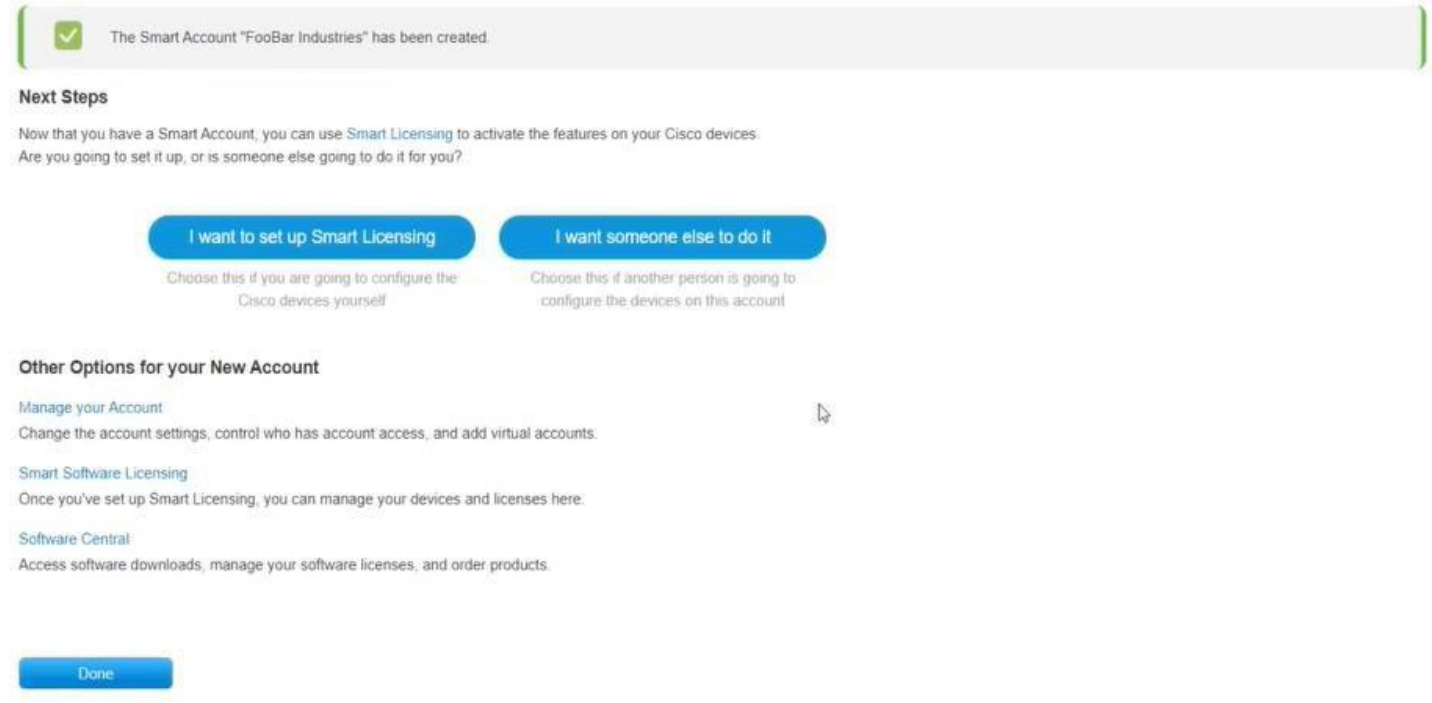## Create Customer Smart Account- Self Error

1 In the CPR Profile Manager, you will need to update name and address fields to valid entries and then return to CSC to open a new Smart Account. This should resolve any errors in the validation system.

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Cisco Software Central (CSC)
Create Customer Smart Account- Confirmation

1 Confirmation page will load. And the **Smart Account has been created.**

The Smart Account "FooBar Industries" has been created.

Next Steps

Now that you have a Smart Account, you can use Smart Licensing to activate the features on your Cisco devices. Are you going to set it up, or is someone else going to do it for you?

I want to set up Smart Licensing	I want someone else to do it
Choose this if you are going to configure the Cisco devices yourself	Choose this if another person is going to configure the devices on this account

Other Options for your New Account

Manage your Account
Change the account settings, control who has account access, and add virtual accounts.

Smart Software Licensing
Once you've set up Smart Licensing, you can manage your devices and licenses here.

Software Central
Access software downloads, manage your software licenses, and order products.

Done

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Request Access to an Existing Smart Account

Cisco Software Central (CSC)
Request Access to an Existing Smart Account

1 A link to **Request Access to an existing Smart Account** is available to the Users.

Smart Licensing

Cisco Smart Licensing is a flexible licensing model that streamlines how you activate and manage software.

For customers

Existing account

Start by getting access to your company's existing Smart Account.

1 Submit request ›

New account

Don't have an account? Create one now.

Create account ›

Account administration

Update information and manage your users.

Manage account ›

Smart Software Manager

Convert classic to Smart Licenses.

Manage licenses ›

Network Plug and Play

Automate device discovery and activation on-prem or from the cloud.

Manage devices ›

Delegate an account

Request an account for your company and delegate another administrator.

Request account ›

Cisco Software Central (CSC)
Create Access to an Existing Smart Account

1 Verify your information is correct

(Optional) Update Profile: Click on the link

3 Write the **Account Domain Identifier.**

Request Access to an Existing Smart Account

Use this page to request access to a Smart Account or Holding Account that has already been established by your company or associates. You will need to know the specific Domain Identifier that represents the Smart Account to request access.

Your Profile

2 Your Cisco.com profile will be included with the access request to the Account Administrators. It is very important that it is accurate before proceeding. If you need to update your profile, do it now.

1

Company / Organization Name:	Cisco Systems, Inc.
Full Name:	Andrew George Blair
Email Address:	andrewgb@cisco.com
Cisco ID:	andrewgb
Phone:	

Smart Account Domain Identifier

Confirm the Smart or Holding Account Domain Identifier you are requesting access to, by entering it below:

* Account Domain Identifier: **3** [e.g. company.com] [Submit]

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Cisco Software Central (CSC)
Create Access to an Existing Smart Account

4 Submit a **reason for requesting access**

2 Click on "**Send Request**" button.

Smart Account Domain Identifier

Confirm the Smart or Holding Account Domain Identifier you are requesting access to, by entering it below:

* Account Domain Identifier:	cisco.com
Account Name:	QATestingCreateAccountHolding
Account Type:	HOLDING

4

I want to have access to this account
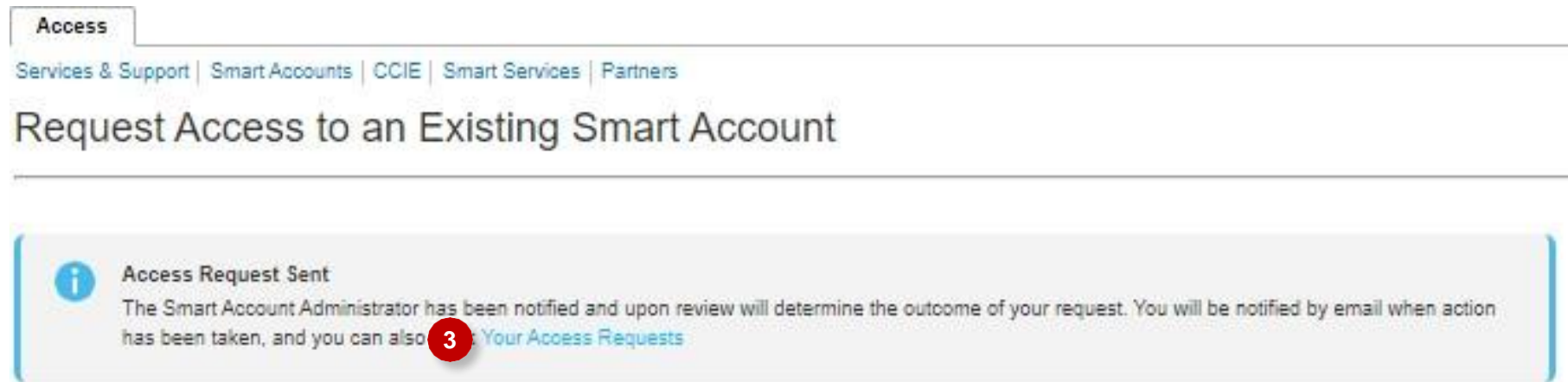
* Reason For Request:

10 character minimum   963 *remaining*

When submitted, the request will be sent to the Smart Account Administrator, who will review and determine the outcome of your request.

Send Request

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Cisco Software Central (CSC)
Request access to an Existing Smart Account

1 The Smart Account Administrator will be notified and upon review will determine the outcome of the request.

2 An Email notification will be sent to your Cisco ID when this has been done. You can also track your requests in the link "**Your Access Request**".

3 Submit a "**Reason for request**" for the Smart Account Administrator to review the access request.

Access

Services & Support | Smart Accounts | CCIE | Smart Services | Partners

Request Access to an Existing Smart Account

ⓘ **Access Request Sent**
The Smart Account Administrator has been notified and upon review will determine the outcome of your request. You will be notified by email when action has been taken, and you can also **3** Your Access Requests

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Smart Account Roles

Customer Smart Account Roles

Smart Account Administrator	Virtual Account Administrator
Manages all aspects of the Smart Account and its Virtual Accounts. The Smart Account Administrator can view and manage license inventory for the entire Smart Account, and also perform Account management activities.	Similar to the Smart Account Administrator, but limited to selected Virtual Accounts. Can perform license management activities and also User management for selected Virtual Accounts.
Smart Account User	**Virtual Account User**
Similar to a Smart Account Admin, this role allows access to all Virtual Accounts. A Smart Account User can perform licensing activities but cannot create new Virtual Accounts or perform User management activities.	Similar to a Smart Account User, but is limited to the Virtual Account the User is assigned to – they can perform license management activities, but cannot add new users to their assigned Virtual Account.

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Customer Smart Account Roles

Partner and Customer Smart Account Roles

User Roles	Capabilities in CSC	Capabilities in SSM	Capabilities in EA Workspace	Capabilities in LRP
Smart Account Approver	• Edit/View Account Properties • View Users at Smart Account & Virtual Account Level • View / Accept Noifications • View Event Logs	• No access	• No access	• No access
Smart Account Administrator	• Edit / View Account Properties • Add / Edit / Delete Virtual Accounts • Add / Edit / Delete Users (at SA and VA level) • View / Accept Noifications • View Event Logs	• Can perform all activities in Smart Software Manager at Smart Account Level and Virtual Account Level	• Can perform all activities in EA Workspace linked to the Smart Account they have access to	• Can perform all activities in LRP linked to the Smart Account they have access to
Smart Account User	• View Account Properties • View Virtual Accounts • View Users (at SA and VA level) • View Noifications • View Event Logs	• Can perform all activities in Smart Software Manager at Smart Account Level and Virtual Account Level	• Can perform all activities in EA Workspace linked to the Smart Account they have access to	• Can perform all activities in LRP linked to the Smart Account they have access to
Virtual Account Administrator	• View Account Properties • View Assigned Virtual Accounts • Add / Edit / Delete Users (capability to add Virtual Account Admins or Virtual Account Users) • View Noifications • View Event logs (restricted to assigned VAs)	• Can perform all activities in SSM for the Virtual Accounts they have access to	• Can perform all activities in EA Workspace linked to the Virtual Account they have access to	• Can perform all activities in LRP linked to the Virtual Account they have access to
Virtual Account User	• View Account Properties • View Assigned Virtual Accounts • View Users (only those linked to assigned VAs) • View Noifications • View Event Logs (restricted to assigned VAs)	• Can perform all activities in SSM for Virtual Accounts they have access to	• Can perform all activities in EA Workspace linked to the Virtual Account they have access to	• Can perform all activities in LRP linked to the Virtual Account they have access to

Account Management for Customer Smart Accounts is d one within CSC License management and activation is done in SSM

For more detailed information, go to the Smart Accou nts Roles Training

Grant Partner Access to Manage Smart Account

You can grant Partners access to manage your Smart Account and there are four user roles that you can assign Partners to:

Role	Access Level	Select this when…
Smart Account Administrator	Partners can view and manage license inventory for the entire Smart Account, and can also perform Account management activities.	You can select this option if only one Partner will be managing your entire Smart Account, and also if the Partner needs to manage Users and Virtual Accounts on your behalf.
Virtual Account Administrator	Partners can view and manage licenses only in specific Virtual Account(s) for which they have been granted access. Partners can also manage Users in the assigned Virtual Account(s).	You can select this option if the Partner will be managing licenses in specific Virtual Account(s) but not within all the Virtual Accounts. Please note that the Partner will also be able to manage Users for the assigned Virtual Account(s).
Smart Account User	Partners can view and manage license inventory for the entire Smart Account.	You can select this option if the Partner will be managing your entire Smart Account, but you would like to keep control over the Account management activities (adding/ deleting Virtual Accounts and User management).
Virtual Account User	Partners can view and manage license inventory for assigned Virtual Account(s).	You can select this option if the Partner will be managing licenses within a particular Virtual Account, but you would like to keep control over adding or deleting Users within that Virtual Account.

Please note that by authorizing a Partner User to access your Smart Account, you implicitly acknowledge that it will enable the Partner User to all the information within the Smart Account that includes Licenses, Devices, etc. In addition, please note that as a Customer you are responsible for all actions performed by your Partners, which includes any licensing transactions.

Customer Support
Submitting Cases

Software Licensing Support:
If you have support questions about Software Licensing, open a case via
Support Case Manager **(SCM)**.

To learn more on how to open a case in SCM, click here.

Product Support: Technical Assistance Center (TAC)
For Technical Support questions, please contact Cisco TAC:
Worldwide Support Contacts

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Additional Resources for End Customers

Location	Description
http://cisco.com/go/smartaccounts http://cisco.com/go/smartlicensing	Cisco Smart Accounts Overview Cisco Smart Software Licensing Overview
Training Schedule Orderable Smart Licensing SKU List	Additional Software training and informational resources
Cisco Software: Capability Overview for Customers	Cisco Software Overview: Smart Accounts, Smart Licensing, Cloud/ SaaS and EA
Cisco Software: Smart Account Create and Setup for Customers	How to Create and set up a Smart Account.
Cisco Software: Smart Account Administration for Customers	How to manage a Smat Account in terms of Virtual Accounts, Users, User Groups, etc.
Cisco Software: Smart Licensing Management with Smart Accounts	Smart Licensing Management in Smart Software Manager
Cisco Software: Classic Licensing Management with Smart Accounts	Classic Licensing Management in the License Registration Portal
Cisco Software: EA Workspace	EA Workspace E2E Training Guide
Smart Account Leading Practices - Customers	Smart Accounts Leading Practices for End Customers
Create Customer Smart Account Quick Reference Guide	Quick step-by-step guide on how to initiate a Create for a Customer Smart Account
Complete Customer Smart Account Setup Quick Reference Guide	Quick step-by-step guide on how to complete the setup for a Customer Smart Account
Getting Started with Smart Accounts Quick Reference Guide	Quick guide on how to create a Customer Smart Account in Cisco Software Central (CSC)
Assign a Partner to Manage Account on your Behalf Quick Reference Guide	Quick step-by-step guide on how a Customer can assign a Partner to manage their Smart Account
Create Access to an Existing Smart Account	Quick step-by-step guide on how to Create access to an existing Smart Account
LRP Main User Guide	- License Registration Portal Main User Guide
Virtual Account Custom Tagging Quick Guide	- How to add Custom Tags to Virtual Accounts
Cisco Software: User Groups Quick Guide	- How to create User Groups in a Customer Smart Account

Questions?

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