Smart Accounts for Partners
Module 1

Software Simplification Overview and How to Request, Create, and Assign Smart Accounts

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Channel Partner Enablement BEM

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Smart Account Overview
Cisco Software Simplification – We Heard You

NEW Simplified Process

- ONE standard licensing platform
- Simplified software lifecycle from quote to activation
- Shared visibility to Cisco devices, software instances, and licenses
- Licenses can be attached to ANY compatible device
- Multiple data transfer options are available for security
- Eliminates the need to re-host
- Easy self management through a single portal
- Cisco driven PAK’s eliminated – New Partner driven Tokens
Rethinking Licensing

Smart Software Licensing is not just a new licensing tool. It transforms how you think about Cisco and the Software Lifecycle Management.

**Limited View**
Customers do not know what they own.

**PAK Registration**
Manually register each device. Unlock with license key.

**Device Specific**
Licenses specific to only one device.

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**Complete View**
Software, licenses, devices in one easy to use portal.

**Easy Registration**
No more need of PAKs. Easy activation with partner driven tokens.

**Company Specific**
Flexible licensing, use across devices.
Smart Accounts for Classic PAKs
Assign PAKs to Smart Account for enterprise-wide visibility

Today's Customer Pain Points
- PAKs and licenses are tied to the individual; limiting access and complicating RMA process
- Manually register all PAKs in LRP; time-consuming process
- Lost or undelivered PAKs involve extra effort for partners and customers

What's changing with Smart Accounts for PAKs?
- PAKs, Devices, and licenses are visible at the enterprise level, simplifying license management
- PAKs are automatically available in License Registration Portal (LRP) when assigned to a Smart Account upfront in CCW Order
- Guaranteed Delivery – PAKs will be available to all users with access to the Smart Account
What’s Changing: Request New Smart Account

You can initiate Smart Account request from CCW, but it’s recommendation to create before ordering.

As a best practice, partners should set up a smart account in CSC before placing an order. In Order, partners can initiate the smart account request from CCW as well.

The smart account request must be approved. It takes 24 to 48 hours for the account to be approved.

Partners must complete the smart account setup in CSC before going back into CCW to assigning the smart account to an order.
Key Features of Smart Software Licensing

Benefits for Customers and Partners purchasing & managing their own licenses

- **Fulfill / Activate**
  - No Product Activation Keys (PAKs), token registration
  - Preload licenses into smart account - ready for activation with tokens

- **Use / Manage**
  - Monitor usage
  - Pool licenses and move to compatible devices in any department—easy RMAs
  - Flexible deployment options to securely report licensing information back to Cisco

- **Renew / Upgrade**
  - Complete and reliable view of software and devices
  - Monitor renew notifications for visibility into expiring licenses
How Does Smart Software Licensing Work?

- Cisco Smart Licensing is a new way of thinking about licensing at Cisco that is being applied to all products.
- Smart Licensing provides a Software Inventory Management System that provides Customers, Cisco, and Selected Partners with information about Software Ownership and Software Utilization.

Ownership

Commerce (CCW)
- I Have Purchased 5 additional ‘Advanced’ Licenses for BigU.edu

‘Smart’ Account

Usage

Hello, I am Device-East5, I belong to BigU.edu and I am using 1x Advanced License

Hello, You are Device-East5, belonging to BigU.edu and the Physics department you are in Compliance

BigU.edu

<table>
<thead>
<tr>
<th></th>
<th>I Own:</th>
<th>I am Using:</th>
</tr>
</thead>
<tbody>
<tr>
<td>License</td>
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<td>10</td>
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<tr>
<td>Additional</td>
<td>5</td>
<td>+1</td>
</tr>
</tbody>
</table>

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Smart Licensing Enabled Products

The following product families are currently smart licensing enabled. A Smart Account is required to purchase an item from this list.

- Cisco Series Aggregation Services Routers (ASR 9000)
- Converged Broadband Router (CBR-8)
- Cisco Cloud Services Router 1000v (CSR1Kv)
- Cisco Unified SIP Proxy (CUSP)
- Cisco 5921 Embedded Services Router (5921)
- Adaptive Security Virtual Appliance (ASAv)
- Securities Services Provider (SSP 3RU)
- Cisco Prime Virtual Network Analysis Module (vNAM)
- Aggregation Services Routers Next Generation (ASR NG)
- UCS Central
- Wireless LAN Controller – vWLC, 5520, 8540

Note: This product family list is as of 01/28/2016. See full list of orderable Smart Licensing PIDs [here](#). The Smart Licensing Product Roadmap is available [here](#).
Create Smart Accounts in Cisco Software Central (CSC)
Smart Account Types

- **Holding Smart Account**
  Account where partners / distributors can temporarily deposit orders until the end customer smart account is identified.

  *Who needs this:* All Channel Partners

- **Customer Smart Account**
  Account where smart account enabled licenses are deposited. Licenses can be managed by customer directly, channel partner, or authorized party.

  *Who needs this:* All customers, and Channel Partners purchasing products for their own use

- **Virtual Smart Account**
  A subset of a smart account used to internally organize licenses.

Further down we will demonstrate how to create a Holding Smart Account, which you will need. Creating a Customer Smart Account is the same process. More details:

- [Request Customer Smart Account](#)
- [Setup Customer Smart Account](#)
Relationship Between Accounts

Definitions

**Holding Smart Account**: A virtual depository for temporary storage of orders -- no activation or usage capabilities.

**Customer Smart Account**: Account for storage of smart enabled product licenses to be managed by customer directly, channel partners, or authorized party.

**Virtual Smart Account**: It's an optional sub-account created with the sole propose of organization.
How Do Smart Accounts Affect You?

We are transforming how you do business with your customers and Cisco in the new software market.

- Assign a Smart Account when Ordering
  - Smart Account is required to submit Smart Licensing order and is optional (but recommended) for other license orders.

- Smart Account provides visibility to customer install base

- Customers can assign access to partners to view, order and/or manage products and licensing on their behalf

- Smart License management processes to become more efficient with the introduction of Cisco Smart Software Management
Create Smart Accounts in CSC

Section Agenda

1. Request Smart Account
2. Setup Smart Account Post-Approval
Request Smart Accounts
Call to Action!
Create Smart Account and Assist Customers with Smart Account Setup

Create a Holding Smart Account and Customer Smart Account for your company and assist your customers with their Smart Account setup.

Request Customer Smart Account on behalf of Customer from CCW or CSC

Explain Smart Account Concept to Customer

Confirm Customer accepted Creator Role

Confirm Customer completed Smart Account Setup in CSC

Creator MUST be a part of the Customer Company. Creator CANNOT be the partner or sales POC

Similarly, a distributor can help their 2-tier reseller set-up a holding account as well.
Connected Smart Account Experience
Software.cisco.com is the one stop website for all your software licensing needs

The next slides demonstrate how to create a Holding Smart Account, which you will need. Creating a Customer Smart Account is the same process. More details:

- Request Customer Smart Account
- Setup Customer Smart Account

Order and Assign Smart Account in CCW (Smart Account Mandatory for Smart Licensing Orders)

Manage Smart Licenses in SSM and Traditional PAK licenses in LRP

Create and Manage Smart Account in CSC
Cisco Software Central (CSC)
Request Customer Smart Account – Select an Account Approver

1. On the Smart Account Request page, select Yes or No to assign yourself or someone else to be the account creator and represent the company.

2. In the Account Information sections, click Learn More to view info on the Account Domain Identifier.

3. Enter Account Name and click Continue.

Creator
This individual has the authority to represent his or her company and create the Account. Note that the Creator can also be the Requestor.

If you are requesting an account on behalf of a customer, these are similar steps that you would take to request a Customer Smart Account account from CSC. During this step you would say no, and enter in the customer email address.

Account Domain Identifier
- Identifies company owning the account
- Should be internet domain of company
- Defaults to Approver email domain – can be changed through manual approval
Review the Account information and Click **Create Account**.

It will go into pending state until the person specified as the Creator completes the setup process. They will receive an email with instructions. If the requestor indicated that they were also the creator, then they will proceed to selected the company address at this time.
Cisco Software Central (CSC)
Request Customer Smart Account – Update the Account Domain Identifier

1. Click **Edit** to update the Domain Identifier of the Account.
2. In the Edit Account Identifier dialog box, review and update domain identifier information and click **OK**.
3. Click **Continue** to complete the smart account request.
Setup Smart Account Post-Approval
Cisco Software Central (CSC)

Setup Smart Account Post-Approval

On the Cisco Smart Account Identifier Approved page, you can choose to perform the following:

1. Click **Complete Smart Account Setup** to continue with the smart account creation.
2. If you don’t have a CCO, and need one, click **register for a new account**.

![Sample Image]

**New Cisco Smart Account - Big-U University (Pending)**

A new Cisco Smart Account has been requested for "Big-U University" and you have been designated as the person to create this account. A Smart Account is used for managing your company’s relationship with Cisco, including initiatives such as Smart Licensing. This account is currently in a Pending state, as it requires a person designated as the "Account Creator" to complete the process. Review the Account Summary information below and click the Complete Smart Account Setup link to continue.

1. [Complete Smart Account Setup]
2. [register for a new account]
Cisco Software Central (CSC)

Accept Creator Role

Creator will Accept the role or decline and/or nominate another person. In this example, we are assuming they accepted the creator role.
Cisco Software Central (CSC)
Complete Smart Account Setup

1. Enter the account name in the Account Name field. Edit domain if needed.
2. Click Continue.
Cisco Software Central (CSC)
Complete Smart Account Setup – Search Address

1. Select the corporate headquarters legal country location for the Smart Account.
2. Enter the name of the company. Search results will populate. You can also click **Show more Results**.

**Note:** Fields may be pre-populated. If you need to filter the search list, type in more specific address details.
Cisco Software Central (CSC)
Complete Smart Account Setup – Select Address

1. This is the Show more Results screen. Select Address and click Continue.
2. If you are unable to find your address, click Can’t find the address? checkbox to create a new address.
Cisco Software Central (CSC)
Complete Smart Account Setup – Create Address

1. Enter the company/organization headquarters address if you cannot find the address. Click Continue.
2. Click Use Modified Address.

Smart Account Setup

In order to validate the identity of the new account, Cisco requires that the account be associated with the legal address for the company/organization headquarters.

1. Enter Company/Organization Headquarters Address
   - Company/Organization Name: Big University
   - Country: Canada
   - Address: 6555 Kingston Road
   - City: Toronto
   - State/Province/Region: Ontario
   - Zip Code/Postal Code: 12345

2. Use Modified Address
Cisco Software Central (CSC)
Complete Smart Account Setup – Select Additional Approvers & Administrators

1. Add Approvers or designate yourself as the approver. The Approver should have the authority to bind the company in any agreements pertaining to the Smart Account.
2. Add Account Administrators.
3. Click **Continue**.

**Approver:**
- A User with the authority to bind their company to certain agreements, e.g., license agreements.
- Accepts the Smart Licensing agreement

**Administrator:**
- Approve access for other users' smart accounts
- License management in Smart Software Manager
- Can accept the Smart Licensing agreement → becomes Approver
Cisco Software Central (CSC)
Complete Smart Account Setup

1. Review the account information and click **Create Account** to complete the Account Setup.
Cisco Software Central (CSC)  
Complete Smart Account Setup - Confirmation

Confirmation page. Click Cisco Software Central to view and manage your Smart Account. To manage the individual Smart Licenses, go to SSM.

Smart Account Request

Holdup Smart Account Setup Complete
The account setup process has been completed and a confirmation email will be sent to you shortly.

Account Information
- Account Domain Identifier: test.holdingaccount.yahoo.com
- Account ID: Amazon
- Address: IBM CORPORATION (IBM GLOBAL, SERVICES PACIFIC)
- City: CYPRESS
- State/Province Region: CA
- Zip Code/Postal Code: 90030
- Country: UNITED STATES
- Account Approver: Ravis Kumar Gusalia (rjussiala@cisco.com), sijamilasheere@com.com
- Account Administrator: Ravis Kumar Gusalia (rjussiala@cisco.com)
- Account Creator: Ravis Kumar Gusalia (rjussiala@cisco.com)
- Requested By: Peter Jackson (sijamilasheere@com.com)

Getting Started
- Go to Cisco Software Central to get started with your account.
- View and manage account properties.
- Add Account Administrators and Account Approvers.

Account created successfully.
Manage Smart Holding Account in Cisco Software Central (CSC)

Administrator:
- Approve access for other users’ smart accounts
- License management in Smart Software Manager
- Can accept the Smart Licensing agreement → becomes Approver
Cisco Software Central (CSC)
Manage Smart Accounts – Access Multiple Smart Accounts

1. Click the Arrow icon next to the Smart Account name to display the list of accounts and then select the desired account to switch to.

This view will only be available to:
- Someone who has access to multiple customer accounts
- Someone who can access their own holding account and end customer accounts
Cisco Software Central (CSC)
Manage Smart Accounts

1. To access and manage Smart Account, click **Manage Smart Account**.

![Cisco Software Central Screenshot](image-url)
Account Name can be modified by Account Approver or Administrator in Account Properties tab.

*Note: the Account Name should reference the Company Name, to mirror the Domain of the Account Owner’s Company. E.g. If the Domain is Cisco.com, the Account Name should be Cisco.
1. In the Virtual Accounts tab, click **New Virtual Account** to add a new Virtual Account.
2. Enter the name and description and make it the default account if desired. Click **Save**.
Click Virtual Account link to edit the existing virtual accounts.
2 You can edit name, description, and change default in the General tab.
3 Associated users display in the Users tab.
4 Click **Delete** to delete the Virtual Account.

Note: Manage orders assigned to the Holding Smart account in CCW.
Cisco Software Central (CSC)
Manage Holding Smart Accounts – Users

1. Click **Add New User**.
2. Enter CCO ID or Email and select Role Context and User role.
3. Click **Continue**.
Cisco Software Central (CSC)
Manage Holding Smart Accounts – Notification Settings

1. Edit email notification settings for when orders are provisioned to the Holding Smart Account
Cisco Software Central (CSC)
Manage Holding Smart Accounts – Event Log

1. View all activity at the Smart Account level to have better visibility into the Smart Account.
2. Filter results by a specific date range, Event type (user management, virtual account management or Smart Account management), or search by the user who took the action.

Note: License activity is not available in CSC. Go to SSM for Smart Licenses or LRP for Classic PAK based licenses.
Assign and Request Smart Accounts in Cisco Commerce Workspace (CCW)
Order and Assign Holding Smart Accounts
CCW Ordering Scenarios

PAK Based Licenses

Smart Account assignment is optional but recommended since PAKs will automatically be available in LRP and visible at the enterprise-wide level.

The best practice is to assign the End Customer Smart Account at the time of order for the PAKs to be automatically available in LRP. You can assign an end Customer Smart Account up until the order is fulfilled, which is usually 24-48 hours after the order is placed.

Otherwise, PAKs can be assigned to the Smart Account post order in LRP so Customers can benefit from enterprise-wide access control and visibility.

Smart Licenses

Smart Account assignment is mandatory to submit the order. The Smart Licenses will be automatically activated and available in SSM.

Detailed Smart Account assignment scenarios will be covered later in this deck, but the initial order can be assigned to either the Customer Smart Account or the Holding Smart Account and re-assigned to the Customer Smart Account post order.
CCW
Getting Started

You can only assign smart accounts in CCW Order.

1. Create standalone order and add a smart account enabled SKU and assign smart account information.
2. Add a smart account enabled SKU in Quote, convert to an order, and assign smart account in Order.

Service Contracts and Subscriptions tabs are now consolidated under one single Services and Subscriptions Tab.
On the Order Initiation page, you can assign a Smart Account upfront by clicking **Assign Smart Account**. The assignment will cascade to all licenses on the order, for both Smart Account Mandatory and non-Smart Account Mandatory SKUs.

**Holding Account** is assigned to the entire Order, whereas a **Customer Smart Account** is assigned to the specific lines, and can be edited at the line level.
When is Smart Account Assignment Required

1. Add SKUs through the as-is CCW process.
2. For mandatory Smart License SKUs, the SA icon and Smart Account Required message in red text are displayed. Smart Account assignment is required to submit the order.
3. For optional Smart SKUs, Smart Account message is displayed in black text.

CCW displays the Smart Account Icon in the collapsed view of an Assemble To Order (ATO) when one of the minors is “Mandatory,” even if the ATO itself is not “Mandatory”. This applies to Order, Quote and Configuration.
CCW
View Smart Account Name and edit Smart Account (Items tab)

1. For SKUs already assigned to a Smart Account, the name of the Smart Account is displayed in black.
2. You can click the pencil icon to edit/change Smart Account.

![Image of CCW interface with Smart Account section highlighted.](image-url)
Assigning Smart Account in Order

1. Assign Smart Accounts at header or line level. Holding Accounts can only be assigned at header level to the entire order.
2. You can also select certain lines and assign a Customer Smart Account to all selected items.

Only one Holding Account can be assigned to an order, but different Customer Smart Accounts OR Customer Smart Account Virtual Accounts can be assigned to each line.
CCW
Assigning Smart Account in Order

1. From Header, select account type and search.
2. From Line, search for Customer Smart Account

Assigning Customer Smart Account in Order:

1. In the Assign Smart Account window, select the Customer Smart Account type.
2. In the Assign Customer Smart Account window, enter the account details or request a new account.
CCW
Associating Partner Holding Account

1. Smart Account assignment now display. Click Pencil icon to edit, or Eraser to delete.
2. (Optional) At header level, associate Partner Holding Account by clicking Associate Partner Holding Account with Order.

Partner Holding Account Association
- Serves as a record for the Partner. The licenses are deposited into the Customer Smart Account, since their account is also already on the order.
- Instead of sharing the order with specific individuals, associating the Holding Account allows the Holding Account users access to the order in CCW - provides enterprise-wide access to the Order.
Once you have assigned an existing Smart Account or requested one (Customer or Holding), you will be able to submit the order with Smart Account Mandatory SKUs/Smart Licenses.

If you have a Smart Account Mandatory item, and haven’t selected a Smart Account, then you will receive error messages informing you to assign a SA.
When are Licenses Available in Smart Accounts?

Assuming the order was placed successfully without any holds and the Smart Accounts have been created:

**Assigned to Holding Account**

In order booked status and onward:
- Order will show up in the Partner Holding Account shortly after the Order gets into Booked status, and you can re-assign to Customer Smart Account.
- For Smart Account Optional orders you can assign a Smart Account up until the order is fulfilled, otherwise assign to Smart Account in LRP.

**Assigned to End Customer Smart Account**

In order shipped status:
- Licenses will show up in the End Customer Smart Account 24-48 hours after the Order had moved into Shipped status.

If the order was assigned to an incorrect Customer Smart Account, raise a case with Cisco to modify SA assignment.
Request New Holding Smart Account
Cisco Commerce Workspace (CCW)

Requesting A New Smart Account

1. Click **Assign Smart Account** at header or line level, and select **Account type**.
2. Select the **account type** radio button, then click **Request New Account**.
CCW
Assigning Smart Account in Order – Search

1. Search using the End Customer Domain ID or Smart Account Name. Results auto-populate.
2. If you find the correct account, click Assign.
3. If you cannot find the correct Customer Smart Account, and know the Customer information, click Request New Customer Smart Account.

This example shows searching for end Customer Smart Account. Process of searching and requesting smart account is the same for Holding Smart Account.
CCW
Submit Smart Account Request

3. Enter approver email address. This must be someone associated with the customer company.
4. Domain is defaulted from Approver emails. To edit the Account Domain Identifier, click Pencil icon.
5. Click Submit Account Request. This account will now be assigned to the order, and you can submit the order.
Assign Customer Smart Accounts Post Order Submission
If a Holding Account is assigned, you will receive a notification upon order submission informing you that a Customer smart account assignment is required (for Smart Licenses only). Email preferences are set in CSC.

**Notification Recipients**
- Whoever normally receives CCW notifications
- Order Manager for Holding Accounts
CCW
Search for Smart Account Orders

1. To reassign an order from a Holding Smart Account to a Customer Smart Account or to a different Holding Smart Account, search for the order.
2. Under Orders, click **Smart Account Orders**.
CCW Filter Smart Account Assignment Status

1. All Orders with Smart Accounts Display. Click the Customer Smart Account Status column to filter the Not Assigned orders to the top.
2. Click the Web Order ID to assign a Customer Smart Account to that order.

Not Assigned status indicates order was originally assigned to Holding Account and needs to be re-assigned to end Customer Smart Account so the end Customer can activate and consume the licenses.

This status displays for orders with both SA mandatory and SA optional SKUs.
CCW Change Smart Account Assignment

1. In the header level message, click **View or change Smart Account Assignments** to change the Smart Account assignment.
CCW
Change Smart Account Assignment

1. Following the same process as the initial SA assignment, click Assign Customer Smart Account from the header or line level.

2. Click Submit.
CCW
Smart License Delivery Email

1. For Smart License enabled products, the provisioning is not completed through the standard eDelivery process. In the email received, Customer will need to click **To View Your Smart Licenses**. This will take them to SSM, where they will view licenses and register them to a device.

   - If the licenses are Classic / PAK licenses, it will say **Register Claim Certificates (PAKs)** instead and those will be accessible in LRP through the as-is process today or automatically available in LRP if assigned to a Smart Account in CCW.

### eDelivery Access Order

<table>
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<tr>
<th>Line Id</th>
<th>Product ID (SKU)</th>
<th>Description</th>
<th>Qty</th>
<th>Carton/Cust Ref</th>
<th>Line Notes</th>
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<tbody>
<tr>
<td>92345678</td>
<td>L-ASA105-K9=</td>
<td>ASA10 (eDelivery)</td>
<td>1</td>
<td>PO# 123456</td>
<td></td>
</tr>
<tr>
<td>92345679</td>
<td>L-ASA105-STD</td>
<td>ASA10 with Standard Tier licenses (eDelivery)</td>
<td>1</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- eDelivery Access Order: Access and download all the order content including software, licenses, documentation, additional items and instructions via eDelivery.
- To View Your Smart Licenses: Access your Smart Account to view licenses and registered devices in your Smart Network.

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**Note:** PAKs will continue to be fulfilled through the selected option – physical or eDelivery.

If they were assigned to a Customer Smart Account from CCW, they will be automatically available in LRP. If they weren’t, then they will be registered and managed in LRP following the as-is process.
Smart Account Transaction Traceability
You can now view Smart Account transactions in the post-sale assignment page via a new “View History” link at the header and line levels.

1. Click View History at the Header level.
2. You can access Smart Account Historical details for both Customer and Holding Accounts.
Smart Account Transaction Traceability

View History

Smart Account Historical details are available also at the line level.

3. Click **View History** at the Line Level.

4. View Historical Information.
Additional Information
Customer Support

Submitting Cases

Software Licensing Support

- Customers with Software Licensing issues/questions can open a case using standard Cisco processes:

  - Software Licensing Support

  - Software Licensing Support Hours
    - Monday – Friday: 8:00 am – 5:00 pm (US PT)

Product Support

- Technical Assistance Center (TAC)
  - Customers can contact TAC for product support issues & questions using existing Cisco processes

Online

Email

Phone

Licensing@cisco.com
Smart-support-team@cisco.com
## Additional Reference Material

<table>
<thead>
<tr>
<th>Material</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>CSC</strong></td>
<td><strong>Introduction to Smart Accounts Video</strong> Video providing an introduction to Smart Accounts, how to request, setup, and assign users to a Smart Account.</td>
</tr>
<tr>
<td>1. <strong>Smart Account Setup and Management</strong></td>
<td>Step-by-step instruction on how to request, setup, and manage Customer and Holding Smart Accounts.</td>
</tr>
<tr>
<td>• <strong>Customer Smart Account Request Quick Reference Guide</strong></td>
<td>Quick guide on how to request a Customer Smart Account.</td>
</tr>
<tr>
<td>• <strong>Customer Smart Account Set Up Quick Reference Guide</strong></td>
<td>Quick guide on how to setup a Customer Smart Account post account approval.</td>
</tr>
<tr>
<td>• <strong>Partner Holding Smart Account Request Quick Reference Guide</strong></td>
<td>Quick guide on how to request a Partner Holding Smart Account.</td>
</tr>
<tr>
<td>• <strong>Partner Holding Smart Account Set Up Quick Reference Guide</strong></td>
<td>Quick guide on how to setup a Partner Holding Smart Account post account approval.</td>
</tr>
<tr>
<td><strong>CCW</strong></td>
<td>2. <strong>Ordering and Assigning Smart Accounts</strong> Step-by-step instructions on how to order and assign smart enabled products to smart accounts, and assign an order from a holding account to customer smart account.</td>
</tr>
<tr>
<td><strong>CSSM</strong></td>
<td>3. <strong>Customer Smart License Management</strong> Step-by-step instructions on how to activate and manage licenses and create virtual accounts.</td>
</tr>
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</table>
# Holding Smart Account Roles

<table>
<thead>
<tr>
<th>Role Context</th>
<th>User Roles</th>
<th>Main Tasks</th>
<th>Role in CSC</th>
<th>Role in CCW</th>
</tr>
</thead>
<tbody>
<tr>
<td>Smart Account Management</td>
<td>Smart Account Approver</td>
<td>• Add users</td>
<td>• View and approve Smart Licensing Agreement&lt;br&gt;• Authority to bind the company to license agreements&lt;br&gt;• View Account properties&lt;br&gt;• Add/delete Smart Account Approvers and Administrators</td>
<td>• None</td>
</tr>
<tr>
<td></td>
<td>Smart Account Administrator</td>
<td>• Account Properties</td>
<td>• View and approve Smart Licensing Agreement (upon accepting becomes Approver)&lt;br&gt;• Edit Account properties&lt;br&gt;• License Management in SSM&lt;br&gt;• Add/delete Smart Account Approvers and Administrators</td>
<td>• None</td>
</tr>
<tr>
<td></td>
<td>Holding Account Administrator</td>
<td>• Administer Account Organization and Users&lt;br&gt;• Create Virtual Accounts&lt;br&gt;• Add users to account</td>
<td>• Edit Account properties&lt;br&gt;• Add/Delete Holding Account Administrators, Holding Virtual Account Administrators, Holding Account Order Management Users, Holding Virtual Account Order Management users&lt;br&gt;• Add/ Delete/ Edit Holding Virtual Accounts</td>
<td>• None</td>
</tr>
<tr>
<td></td>
<td>Holding Virtual Account Administrator</td>
<td>• Manage specific Virtual Account. Does not have access to overall account</td>
<td>• View Account properties&lt;br&gt;• View Virtual Accounts&lt;br&gt;• View users of Holding Accounts&lt;br&gt;• Add/Delete Virtual Account Administrators and Holding Virtual Account Order Admin Users (for that specific virtual account)&lt;br&gt;• Set Mail Notifications related to order provisioning</td>
<td>• None</td>
</tr>
<tr>
<td>CCW Order Management</td>
<td>Holding Account Order Administrator</td>
<td>• Search &amp; View Orders assigned to the account (including Virtual Accounts)&lt;br&gt;• Re-assignment of Smart Account in CCW</td>
<td>• View Account properties&lt;br&gt;• View Virtual Accounts&lt;br&gt;• View all Virtual Accounts&lt;br&gt;• Set Mail Notifications related to order provisioning</td>
<td>• View the Holding Account and Holding Virtual Account Orders in CCW.&lt;br&gt;• Modify assignment of Smart accounts in CCW</td>
</tr>
<tr>
<td></td>
<td>Holding Virtual Account Order Administrator</td>
<td>• Search &amp; View Orders assigned to a specific Virtual Account&lt;br&gt;• Re-assignment of Smart Account in CCW for the specific Virtual Account</td>
<td>• View Account properties&lt;br&gt;• View specific Virtual Accounts&lt;br&gt;• Set Mail Notifications related to order provisioning</td>
<td>• Modify assignment of Smart accounts for Orders assigned to the specific Virtual account in CCW.&lt;br&gt;• Set Mail Notifications for which they are a member of the Virtual Account.</td>
</tr>
</tbody>
</table>

Account Creator is automatically provided the Smart Account Administrator and Holding Account Administrator roles.
## Customer Smart Account Roles

<table>
<thead>
<tr>
<th>Role Context</th>
<th>User Roles</th>
<th>Main Tasks</th>
<th>Role in CSC</th>
<th>Role in SSM</th>
</tr>
</thead>
<tbody>
<tr>
<td>Smart Account Management</td>
<td>Smart Account Approver</td>
<td>• Approve Cisco Agreements &amp; Add users</td>
<td>• View and approve Smart Licensing Agreement</td>
<td>• None</td>
</tr>
<tr>
<td></td>
<td>Smart Account Administrator</td>
<td>• Approve Cisco Agreements &amp; Add users</td>
<td>• View and approve Smart Licensing Agreement (upon accepting Administrator becomes Approver)</td>
<td>• None</td>
</tr>
<tr>
<td>Smart Licensing</td>
<td>Smart Licensing Administrator</td>
<td>• Administer Account Organization and Users</td>
<td>• View and approve agreements</td>
<td>• View and approve agreements</td>
</tr>
<tr>
<td></td>
<td>Smart Licensing Virtual Account</td>
<td>• Manage license inventory of specific Virtual Account</td>
<td>• View Account properties</td>
<td>• Add/Delete/Edit Virtual Accounts</td>
</tr>
<tr>
<td></td>
<td>Virtual Account Administrator</td>
<td>• Manage specific Virtual Account. Does not have access to overall account</td>
<td>• Add/Delete Smart Licensing Virtual Account Administrators for their specific Virtual Accounts</td>
<td>• Takes action on Alerts</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Manage license inventory of specific Virtual Account</td>
<td>• Generate tokens for their Virtual Account in SSM</td>
<td>• Generate tokens for specific Virtual Accounts to register products</td>
</tr>
<tr>
<td></td>
<td></td>
<td>*If partner is managing the entire account on your behalf, provide them with this role</td>
<td>• Transfer product instances and licenses across virtual accounts</td>
<td>• Transfer product instances and licenses across virtual accounts they own</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• View Virtual Accounts</td>
<td>• View logs, history and reports</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Takes action on Alerts</td>
<td>• Set Mail Notifications</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Generate tokens for specific Virtual Accounts to register products</td>
<td>• Manage satellites and sync collectors</td>
</tr>
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<td></td>
<td>• Transfer product instances and licenses across virtual accounts they own</td>
<td>• View logs, history and reports</td>
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<td>• Takes action on Alerts</td>
<td>• Manage satellites and sync collectors</td>
</tr>
</tbody>
</table>

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

Account Creator is automatically provided the Smart Account Administrator and Smart Licensing Administrator roles.