Cisco Systems

PICA -
Partner Initiated
Customer Access

The Cisco PICA User Guide

Table of Contents

TABLE OF CONTENTS 2

ABOUT THIS GUIDE 4

BENEFITS OF USING THE PICA TOOL 4

USING THE PICA TOOL 4

PREREQUISITES 4

Logging into the PICA Admin Tool 5

RECOMMENDED FOR BEST PERFORMANCE 5

Hardware Requirements 5
Software Requirements 5
Network Requirements 6

AN OVERVIEW OF THE PICA ADMIN TOOL 6

CHAPTER ONE – 8

REVIEWING THE PICA ADMINISTRATOR TOOL 8
CHAPTER OBJECTIVE 8
FEATURES ON THE PICA ADMIN TOOL PAGE 8
HOW THE PICA ADMINISTRATOR TOOL OPTIONS ARE DETERMINED 8
Requirements for Options to Grant as a PICA Administrator 8
CREATING A NEW PICA REGISTRATION NUMBER 9
Setting Up a New PICA Registration Number 9

CHAPTER TWO – 13

REGISTERING FOR PICA END USERS 13
CHAPTER OBJECTIVE 13
HOW AN END USER REGISTERS FOR A CISCO.COM USER ID 13
Registration for PICA End Users 13

CHAPTER THREE – 18

MANAGING PICA REGISTRATION NUMBERS 18
CHAPTER OBJECTIVE 18
VIEWING PICA NUMBERS 18
CHANGING PICA NUMBER DEFAULTS 20
Changing the Default Settings of a PICA Number 20
INACTIVATING A PICA NUMBER 22
REACTIVATING AN INACTIVE PICA NUMBER 24
DELETING AN INACTIVE PICA NUMBER 25

CHAPTER FOUR – 26

CHANGING END USER PROFILES 26

CHAPTER OBJECTIVE 26
How to Change Multiple End User Profiles *28*

CHAPTER FIVE – 29

GRANTING TECHNICAL ASSISTANCE CENTER ACCESS 29
CHAPTER OBJECTIVE 29
Features Your Customers Will Automatically Have as PICA Users *29*
Features You Decide to Entitle to Customers *29*

CHAPTER SIX – 32

GRANTING COMMERCE ACCESS 32
CHAPTER OBJECTIVE 32
Rules for PICA Commerce Options *32*

CHAPTER SEVEN – 33

REGISTERING YOUR EMPLOYEES FOR CISCO.COM ACCESS 33
CHAPTER OBJECTIVE 33
How Users for Your Company Can Register for Cisco.com Access *33*
How to Become a PICA Administrator *33*

GLOSSARY 34

About This Guide

The *PICA User Guide* explains the *Partner-Initiated Customer Access (PICA)* Program and describes the basic process and responsibilities of being a PICA Administrator. This guide is for use by Cisco Partners who have a service agreement with Cisco that allows them access to the PICA Program. The tool is commonly known as the PICA Tool, a term used in this guide. Topics are presented in a sequential manner so that you can reference the information you need when using the PICA Tool.

Benefits of Using the PICA Tool

- Provides the ability to control your customers' access to Cisco.com.
- Enables you to grant access to your customers to download software from Cisco.com.
- Allows you to monitor your customers' registrations.
- Increases productivity and profitability by allowing you to provide a value-add service to your customer that allows them to help themselves online, such as:
    - Access to the Internet Commerce Tools provided, including Order Status, Configuration with Pricing, and Lead Times Tools.
    - Ability to query cases you open for them using their PICA Registration Number by accessing the Technical Assistance Center (TAC) online.
    - Access to tools that can answer pre- and post-sales questions about Cisco products.

Using the PICA Tool

The Welcome to PICA page provides convenient access to the following PICA functions:

- General Information about PICA
- Administrator's Guide for the PICA Program
- A Preview of the PICA Tool
- How to Register to become a PICA Administrator
- Access to the PICA Administrator Tool

Prerequisites

- You must be a registered user of Cisco.com and be a partner with a direct contract agreement with Cisco. Additionally, you must sell your own brand of support in order to have to access this service.

- You must have logged into the PICA Admin tool to access the functionality outlined in this user guide.

Logging into the PICA Admin Tool

- 1 – Type http://www.cisco.com/go/pica in your browser website address field. The **PICA home page** is displayed.
- 2 – Click **Launch the PICA Admin Tool** link in the middle of the page. The **PICA Administrator Tool** page is then displayed.

Note: While the initial page you may use to find the PICA Admin Tool and information is http://www.cisco.com/go/PICA, the main page you will use (and may wish to bookmark) is the PICA Administrator Tool located at http://www.cisco.com/cgi-bin/xtdent/pica/pica_admin_tool.pl .

Recommended for Best Performance

For the best performance when using the **PICA Admin Tool** please follow these suggestions:

Hardware Requirements

- Pentium 166 MHz (minimum), Pentium 200 MHz or higher (recommended)
- 128 MB RAM
- TCP/IP protocol installed and configured
- Monitor and display adapter capable of 256 colors at 800x600 resolution

Hardware - Optimal Performance Recommendations

- Pentium 200 MHz
- Display adapter capable of 1024x768 resolution

Software Requirements

- Windows 95, 98, 2000 or NT
  - HTML Browser

    Internet Explorer 4.01 Service Pack 1 or higher

    Netscape 4.x

    Internet Explorer 6 and Netscape 6.0 are not currently supported
- Unix (Solaris)
  - HTML Browser

Netscape 4.5 or higher

Netscape 6.0 is not supported

- Linux
  - HTML Browser

    Netscape 4.5 or higher

    Netscape 6.0 is not supported

Software - Optimal Performance Recommendations

- HTML Browser
  - Internet Explorer 5.5
  - Netscape 4.x

Network Requirements

- 56K Modem connection or higher (sustained bandwidth)

Network - Optimal Performance Recommendations

- 512K LAN connection

An Overview of the PICA Admin Tool

The PICA Admin Tool, (Figure A), is the main page you will use as a PICA Administrator for your company.

From this page you may also access:

- The PICA Administration User Guide – Click on **"Help"** (Figure A.1)
- Create PICA Registration Numbers – Click on **"Create PICA Numbers"** (Figure A.2)
- User search based on various criteria – Click on **"Search and Manage PICA Numbers"** (Figure A.3)
- Your PICA Registration Numbers – Click on **"View PICA Numbers"** (Figure A.4)

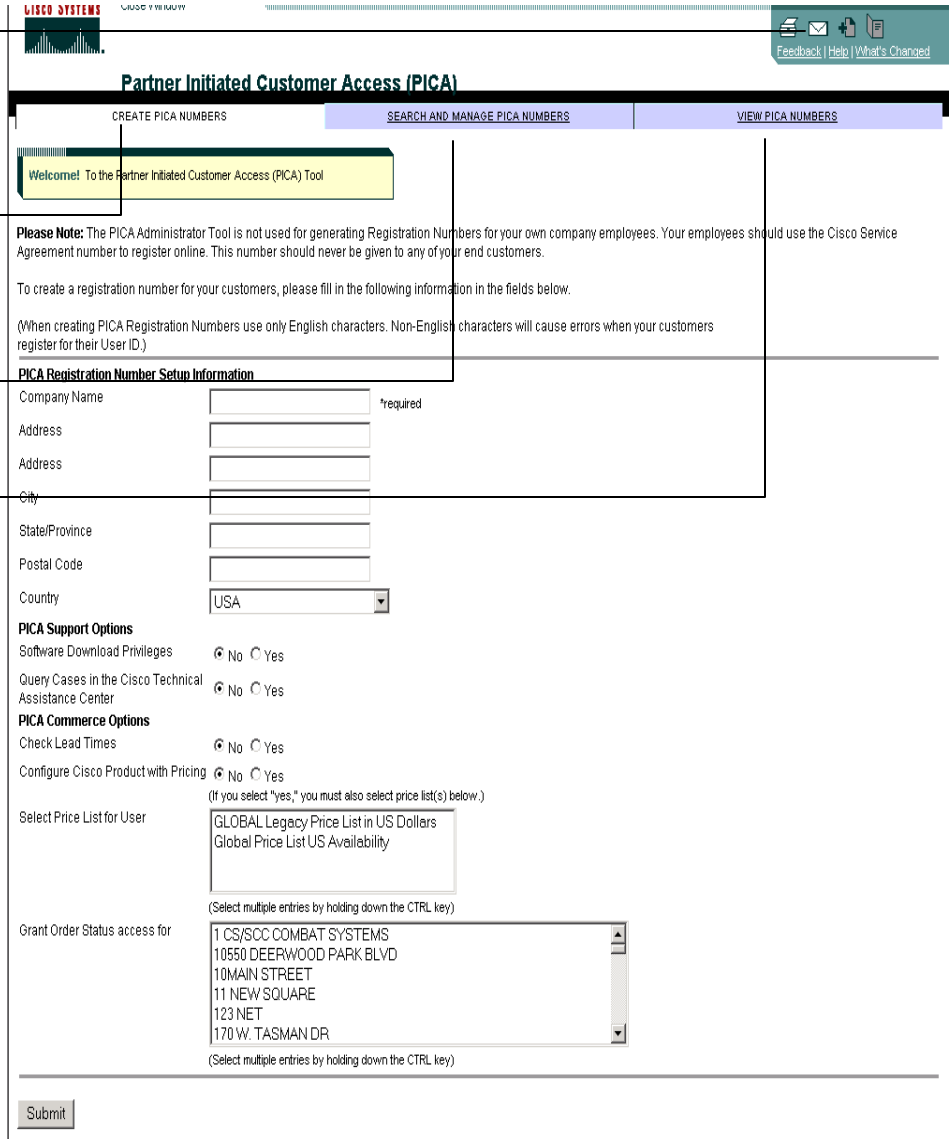
Figure A

A.1 Access the Help functionality

A.2 Create and manage PICA numbers

A.3 Search and manage PICA numbers

A.4 View PICA numbers



Chapter One –

Reviewing the PICA Administrator Tool

The PICA Administrator Tool is the centerpiece of the program, as it allows you to create registration numbers to be used during your customers' registration process.

Chapter Objective

- To acquaint you with the features and sections of the PICA Admin Tool page.
- Learn the requirements for granting access to your customers.
- Create a new PICA Registration Number for a customer.

Features on the PICA Admin Tool page

There are three tabs at the top of the page:

- **Create PICA Numbers** – This section allows you to create new PICA Registration Numbers for employees of your company.
- **Search and Manage PICA Numbers** – This section allows you to search for PICA users by different input types, as well as manage those users.
- **View PICA Numbers** – This section allows you to view the current list of all of the PICA Registration Numbers that your company has created. You may chose to view just the numbers you have created "View My Active PICA Numbers" or view all numbers created by your company in "View All Active PICA Numbers." You may also view Inactive PICA numbers here.

How the PICA Administrator Tool Options are Determined

The PICA Administrator Tool is built based on your contract with Cisco Systems. You must have the following items within your profile to be able to give these options to your customers:

Requirements for Options to Grant as a PICA Administrator

Option	What You Need in your Profile
Software Download Privileges	Access to Download Software from the Cisco.com Software Center.
Query Cases in the Cisco Technical Assistance Center (TAC)	Have access to the Cisco Technical Assistance Center (TAC).
Configure Cisco Product with	Must be registered to use the Internet Commerce Tools.

Pricing	
Check Lead Times	All Administrators can give their customers access to Lead Times Tool.
Grant Order Status Access	For Order Status, you must have already placed an order for your end customer for them to show up in your "Grant Order Status for" list. For more information on the Internet Commerce Tools and access, contact the Cisco Customer Service group. (http://www.cisco.com/warp/public/687/cust_service/contacts.shtml)

Creating a New PICA Registration Number

As a partner, you have many end customers. In order to keep track of them, as well as keep track of the PICA access that you grant each customer, each of your end customer companies should be assigned an individual number. Once you create the number for a particular company, you may forward that PICA Registration Number and Verification Key to a representative within that company that can give it to all users who should register for access. In summary, you create one PICA Registration Number for each end customer company, then within that company, as many users as needed may use the PICA Registration Number to register for their own Cisco.com User ID and password.

Setting Up a New PICA Registration Number

The first step toward generating a PICA number for your customer is to enter his/her information.

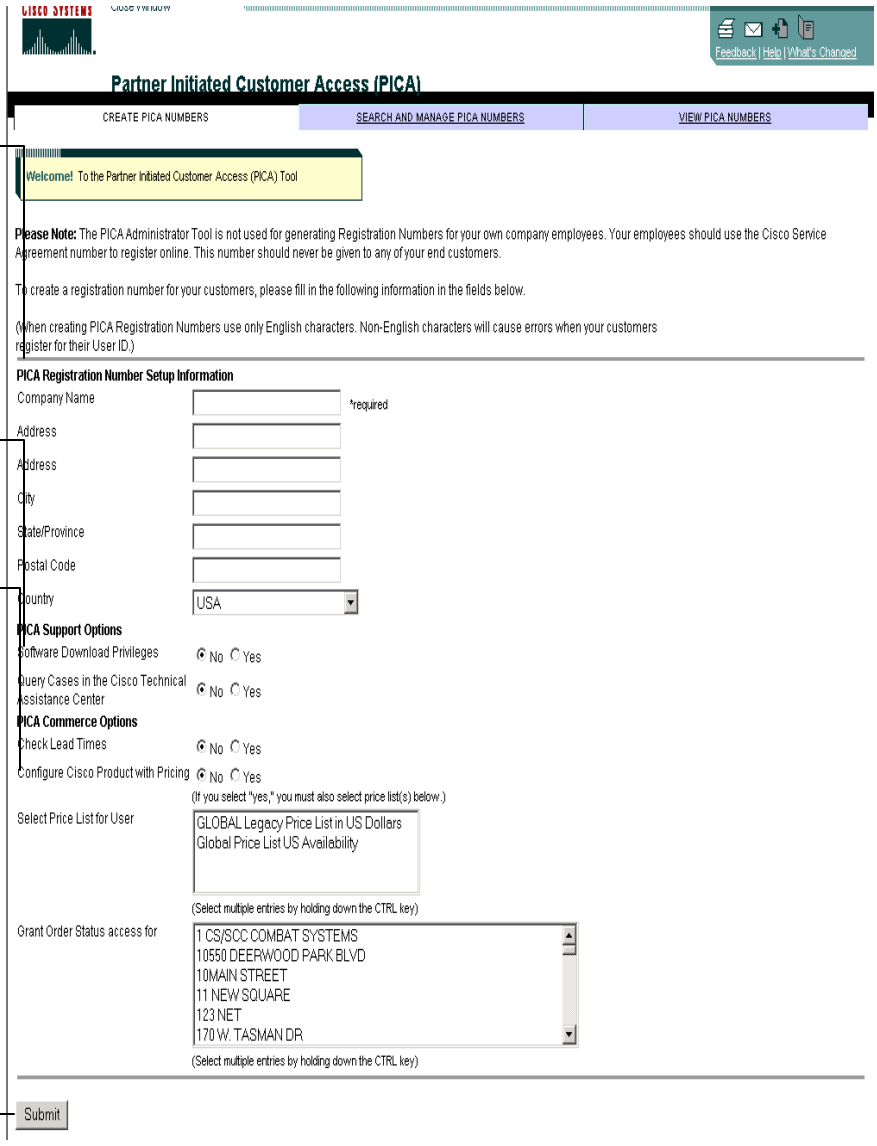
Figure B

B.1 Enter the customer's information

B.2 Select the customer's support options

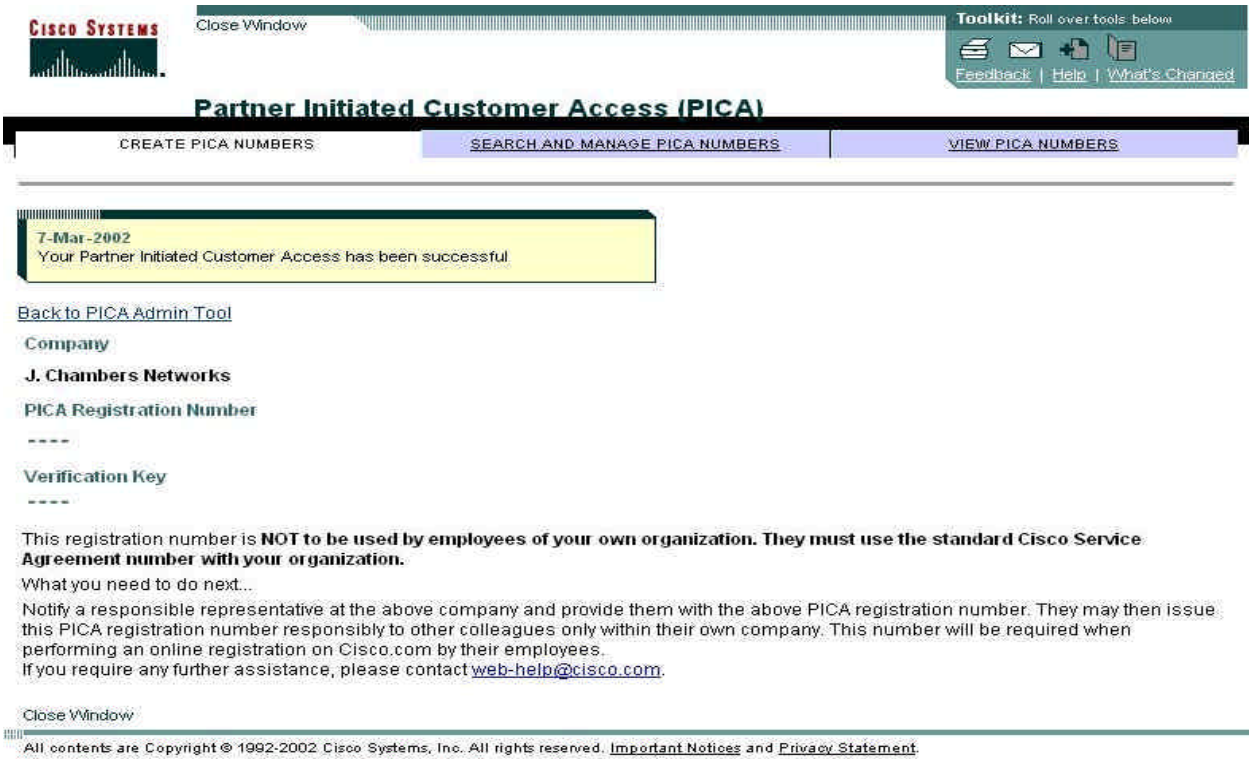
B.3 Select the desired Commerce access options

B.4 Generate PICA number



Step	What You Do
1	Go to the **PICA Administrator Tool** page (Figure B)
2	Fill in your customer's **Company Name**, **Address**, **City**, **State/Province**, **Postal Code**, **Country** (whichever are applicable.) Please note that you may only use standard English characters. Non-English characters will cause errors when your customers register for their Cisco.com User ID. (See Figure B.1)
3	Select the **PICA Support Options** you will allow your customer to have. The options include access to download software and/or access to query any TAC cases you may open for them through Cisco. (See Figure B.2)
4	Select the **PICA Commerce Options** you will allow your customer to have. The options include access to Configure Cisco Product with Pricing, Check Lead Times, Price Lists (must pick at least 1 Price List if you marked "Yes" for Configure with Pricing), and Grant Order Status. In order to Grant Order Status for a customer, you must have already placed an order for them where they were selected as the End User. Their Company Name will then show up in the select list. (See Figure B.3)
5	Click **Generate New PICA Number** and a PICA Registration Number and Verification Key will be generated (See Figure B.4). The PICA number will be generated. (See Figure C)

Figure C


Close Window
Toolkit: Roll over tools below
Feedback | Help | What's Changed
Partner Initiated Customer Access (PICA)
CREATE PICA NUMBERS
SEARCH AND MANAGE PICA NUMBERS
VIEW PICA NUMBERS
7-Mar-2002
Your Partner Initiated Customer Access has been successful
Back to PICA Admin Tool
Company
J. Chambers Networks
PICA Registration Number

Verification Key

This registration number is NOT to be used by employees of your own organization. They must use the standard Cisco Service Agreement number with your organization.
What you need to do next...
Notify a responsible representative at the above company and provide them with the above PICA registration number. They may then issue this PICA registration number responsibly to other colleagues only within their own company. This number will be required when performing an online registration on Cisco.com by their employees.
If you require any further assistance, please contact web-help@cisco.com.
Close Window
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Chapter Two –

Registering for PICA End Users

Once customers have received their PICA numbers, they can register online at Cisco.com

Chapter Objective

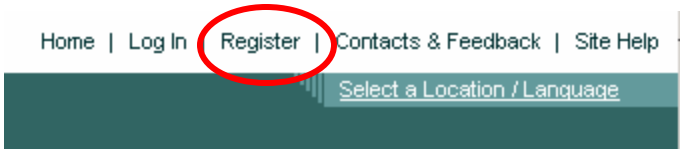
- Learn how your customers register for access to Cisco.com

How an End User Registers for a Cisco.com User ID

Customers must first receive their PICA Registration Number and Verification Key, which you create (as outlined in the previous step). You should only create one PICA Registration Number for each of your end customer companies. All persons at that end customer company may use the same PICA Registration Number and Verification Key during registration to create his or her own Cisco.com User ID.

Registration for PICA End Users

A. Using your web browser, go to the Cisco website at **http://www.cisco.com** and select ***Register*** from the menu bar at the top of the screen.

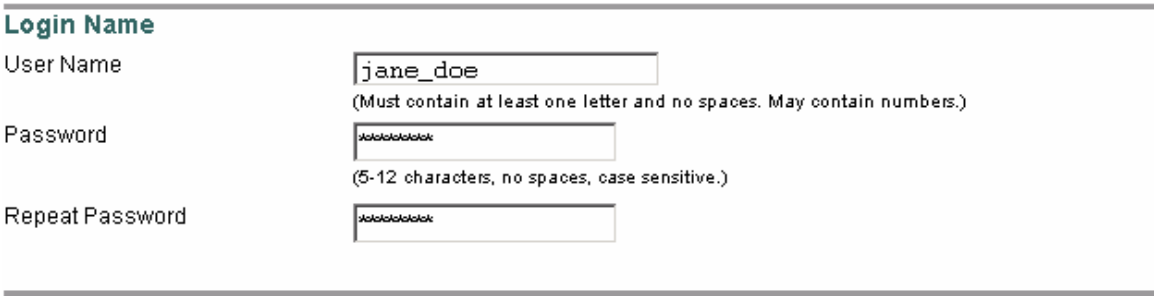


B. Complete the registration form as follows:

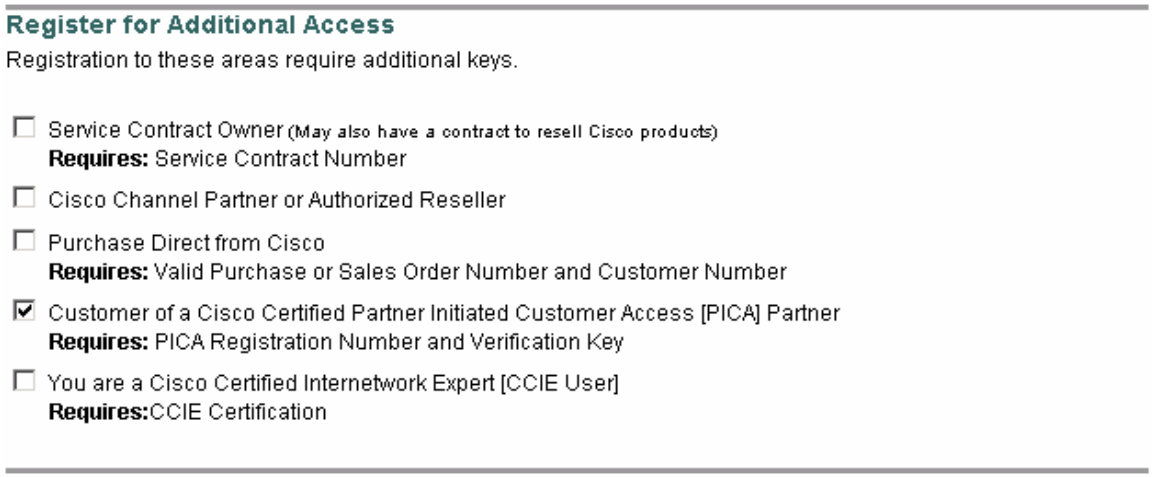
Step 1 of 5

Under ***Your Information***, enter the required information and select your language preference. Be sure to enter the same email address in both email fields. Also, be sure it is an email address that you have access to, as you will need it to verify that email address to Cisco and finish the registration process.

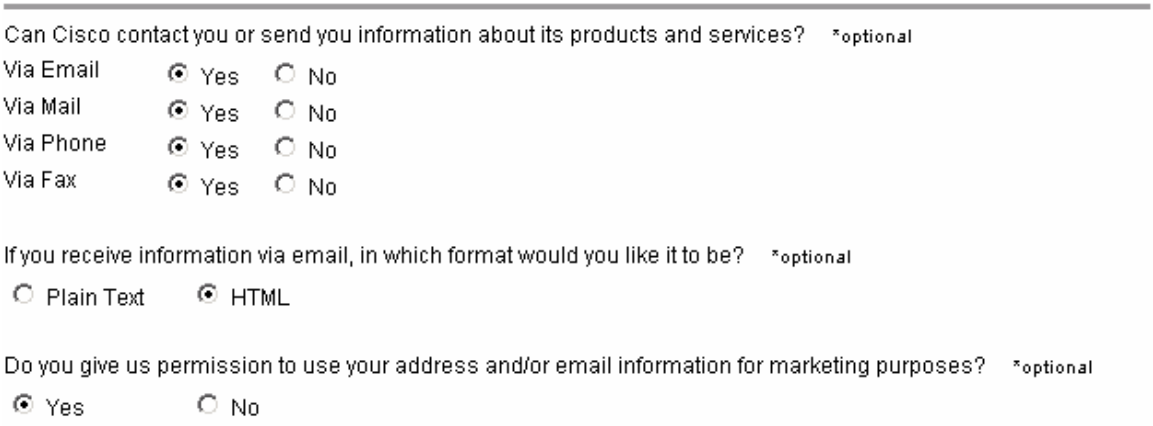
Under ***Login Name***, select your user name and password and enter it into the appropriate field.



Under ***Register for Additional Access,*** select ***Customer of a Cisco Certified Partner Initiated Customer Access [PICA] Partner.***



The last section of **Step 1** contains 3 optional questions concerning how Cisco may contact you.

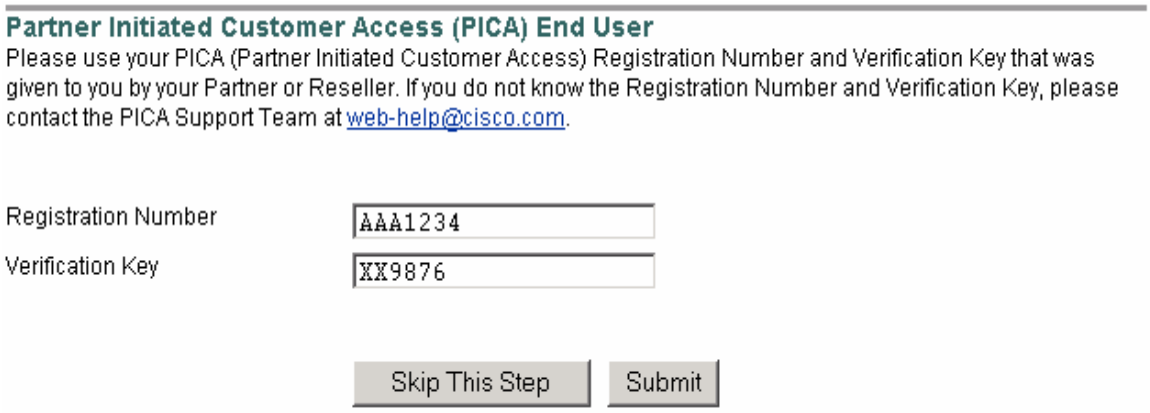


C. Click **SUBMIT** to advance to **Step 2**.

D. Since you selected the PICA option, you will see the below screen.

Step 2 of 5

Enter your ***PICA Registration Number and Verification Key***.



E. Click **SUBMIT** to advance **Step 3**.

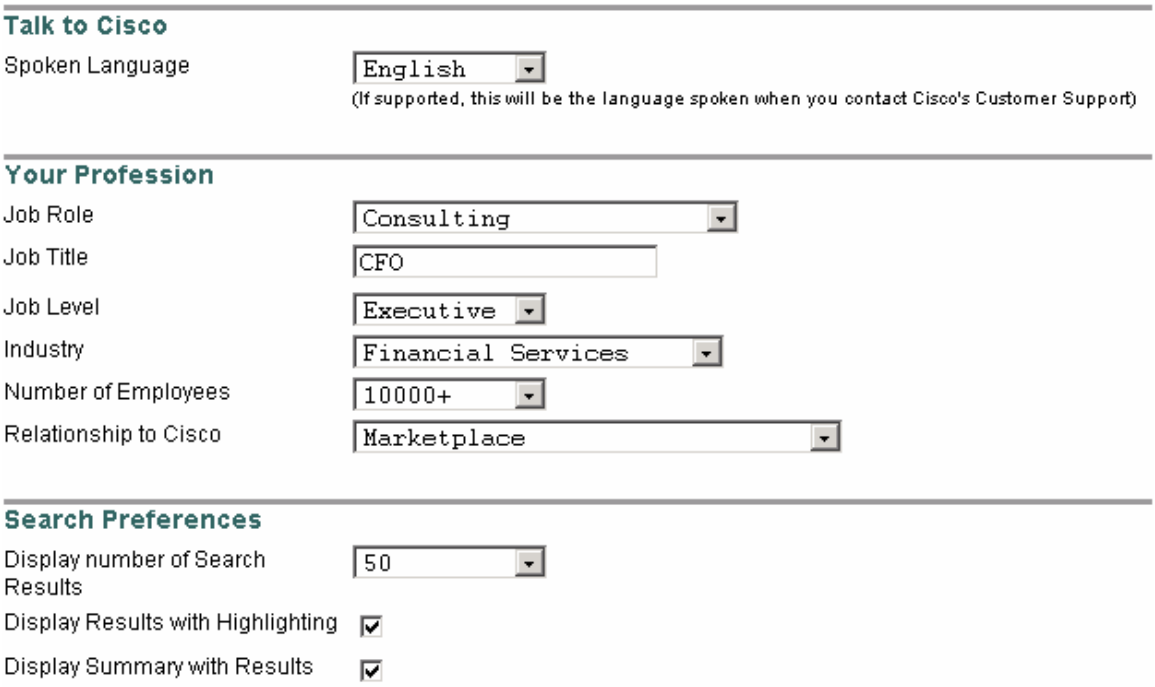
F. Enter your company information.

Step 3 of 5

G. Click **SUBMIT** to proceed to **Step 4.**

H. Enter your interests and preferences.

Step 4 of 5



I. Click **SUBMIT** to proceed to **STEP 5**

J. At this point, an email has been sent to the email address that you provided in **Step 1.**

To complete the registration process, you must click on the link that is inside this email. This will activate your Cisco.com account.

Step 5 of 5

Your account will now be activated by the Cisco.com Entitlement System. If you have any problems with your Internet Commerce account information, you may send an email to commerce-access@cisco.com for further assistance.

Chapter Three –

Managing PICA Registration Numbers

Depending on how many end customer companies you have, you may have only a few, or many PICA Numbers to manage. This section explains how to manage the registration numbers and how to make changes to them, should they prove necessary.

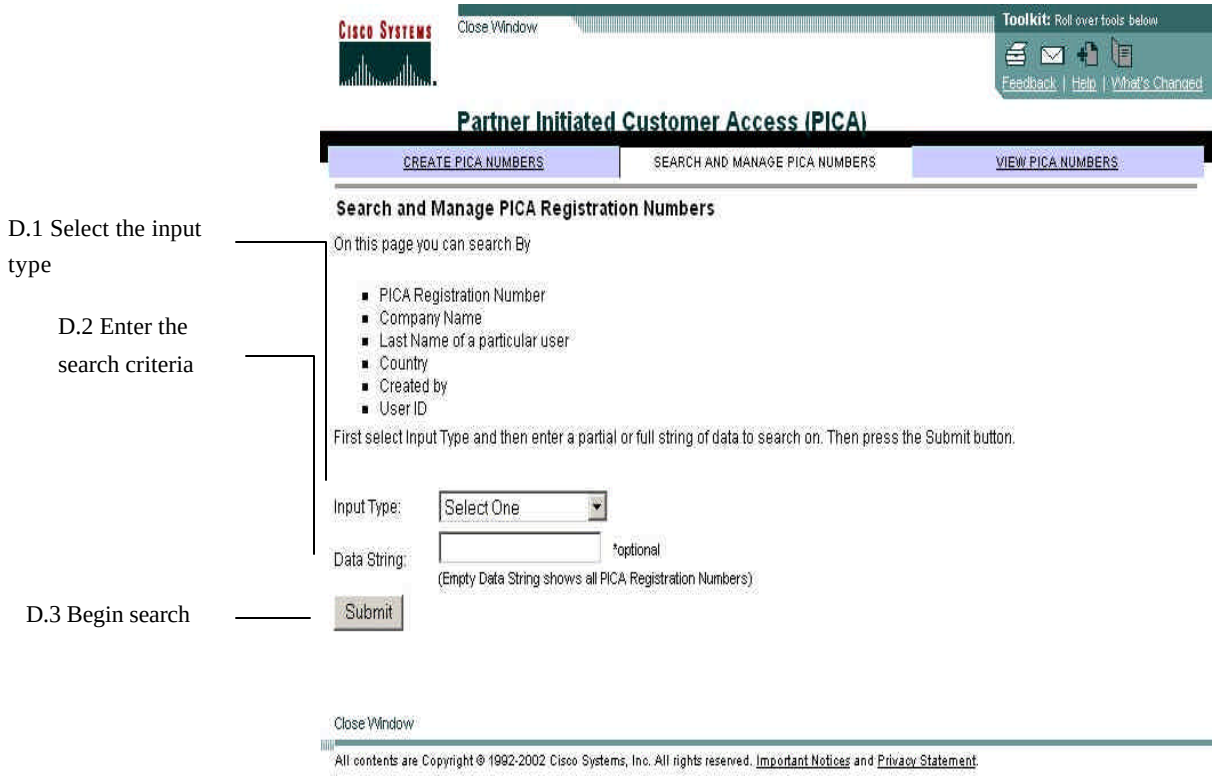
Chapter Objective

- To acquaint you with how to view and manage your PICA Numbers
- Learn how to change the defaults for a PICA Number
- Learn how to inactivate and reactivate a PICA Number

Viewing PICA Numbers

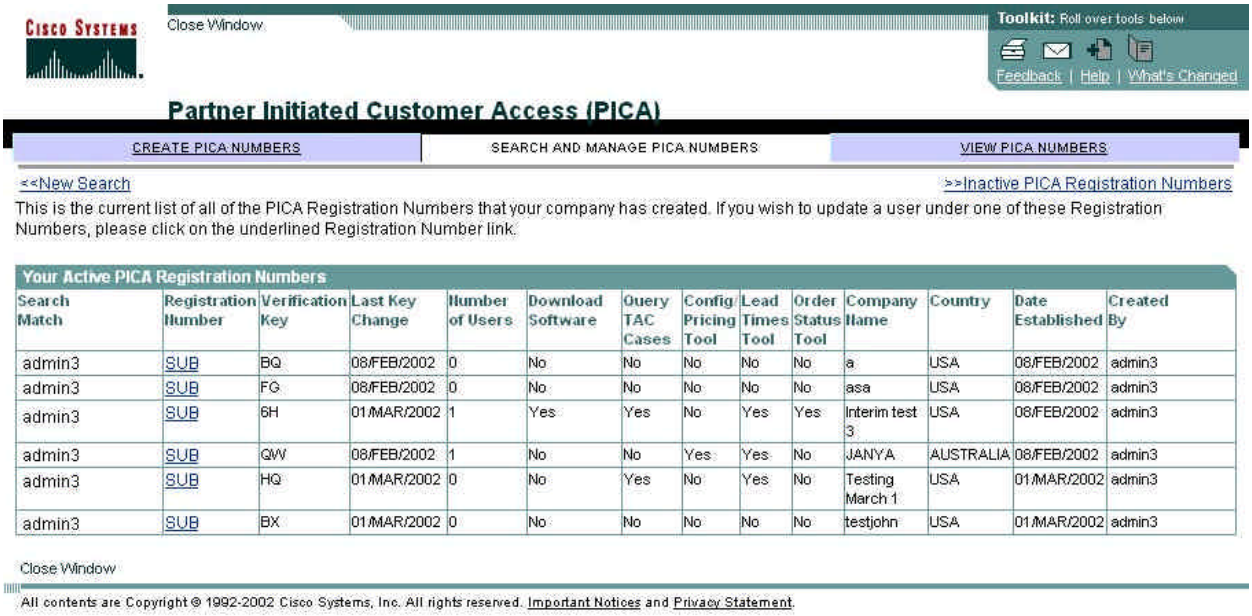
To view all the PICA Numbers that you and your colleagues have created, you must first go to the PICA Administrator Tool, and click on **Search and Manage PICA Numbers** (Figure A.3), so you will be taken to the search page. (Figure D)

Figure D



Step	To Do This	What You Do
1	Select the search criteria	Select the **Input Type:** You may select 6 different options to input to search on: Registration Number, Company Name, Country, Created By, Last Name, and User ID. The Data String will be different for each search based on what you select as the Input Type. (Figure D.1)
2	Enter the search string	Enter the **Search Query.** (Figure D.2)
3	Begin query	Click **Submit.** (Figure D.3) Once you have selected your search criteria, you will be taken to a summary page based on the search criteria you entered. (Figure E)

Figure E



Changing PICA Number Defaults

If you decide to change access options of a PICA Number, new users registering with it will be affected by the changes. Users who already have already registered before you change the PICA Number defaults will not be affected, except in the case of the Order Status option. This will be explained further in Chapter Six – Commerce Access for PICA End Users.

Changing the Default Settings of a PICA Number

Step	What You Do
1	From a list of PICA numbers (Figure E), and click on a hyperlinked PICA Registration Number. You are taken to the PICA End Users Page. The Registration Number is on the bottom of this page as a hyperlink as well. (Figure F)
2	Click on the hyperlinked PICA Registration Number at the bottom of the page (beside "Change default settings for Registration Number…") (Figure F.1 & F.2) You are taken to the PICA Registration Number Administration page. (Figure G)
3	You may change the Verification Key, as well as make changes to the accesses allowed by this PICA Registration Number.

Figure F

F.1 Select the number you want to change

F.2 Click to access edit screen

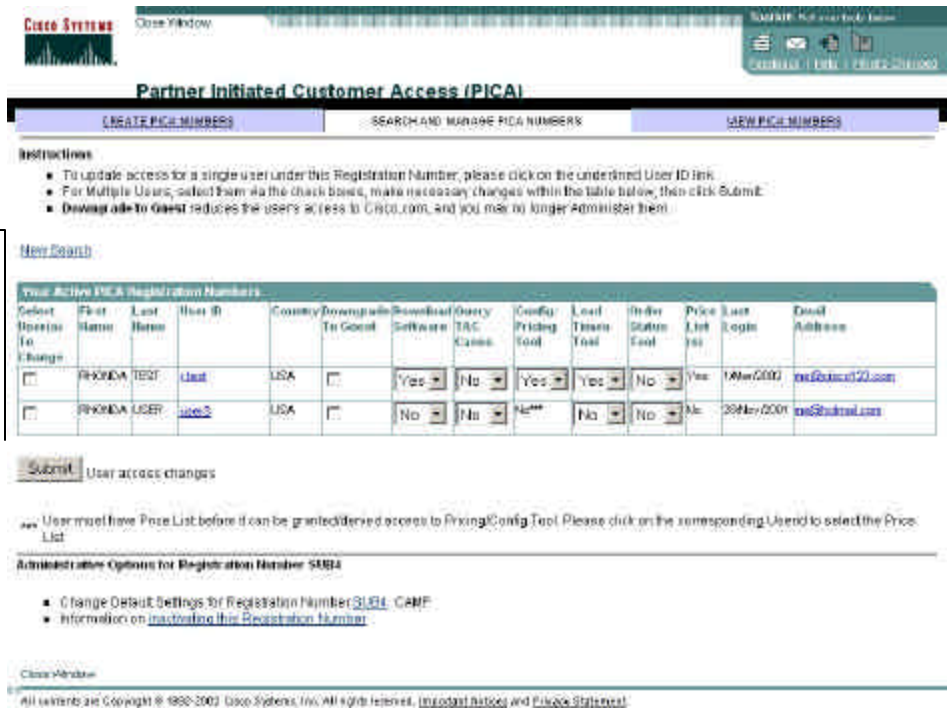


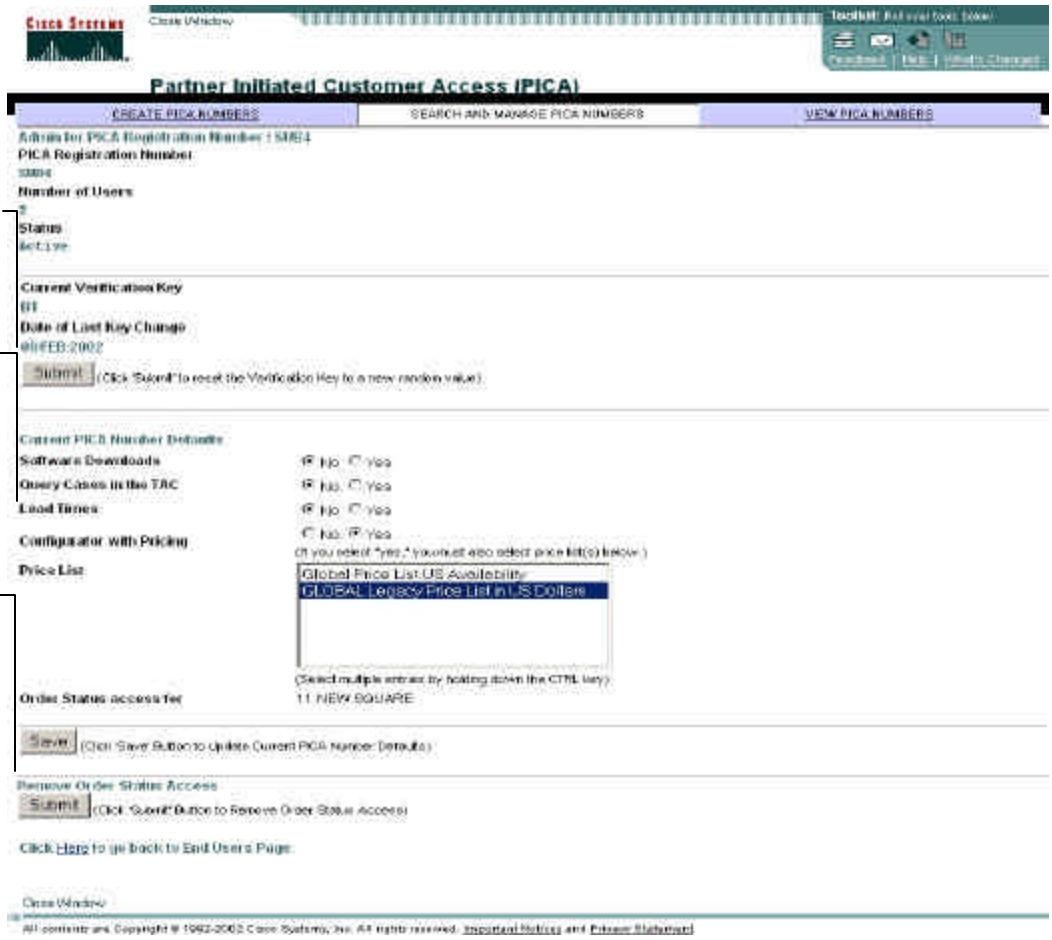
Figure G

G.1 Creates new verification key

G.2 Edit access options

G.3 Save changes

G.4 Remove Order Status access



Reference	Functionality
G.1	Creates new verification key for PICA registrations
G.2	Edits PICA number defaults • Software Downloads (yes/no) • TAC Case Query Access (yes/no) • Lead Times Tool Access (yes/no) • Configurator Tool Access (yes/no) • Price List selection (drop-down list with eligible options)
G.3	Saves new settings
G.4	Removes Order Status access

Inactivating a PICA Number

If you have a customer that no longer buys products or receives service from you—and as such no longer a participant in the PICA Program—you may inactivate that PICA Registration number.

Figure H

H.1 Select number you would like to inactivate

H.2 Click on Inactivation link

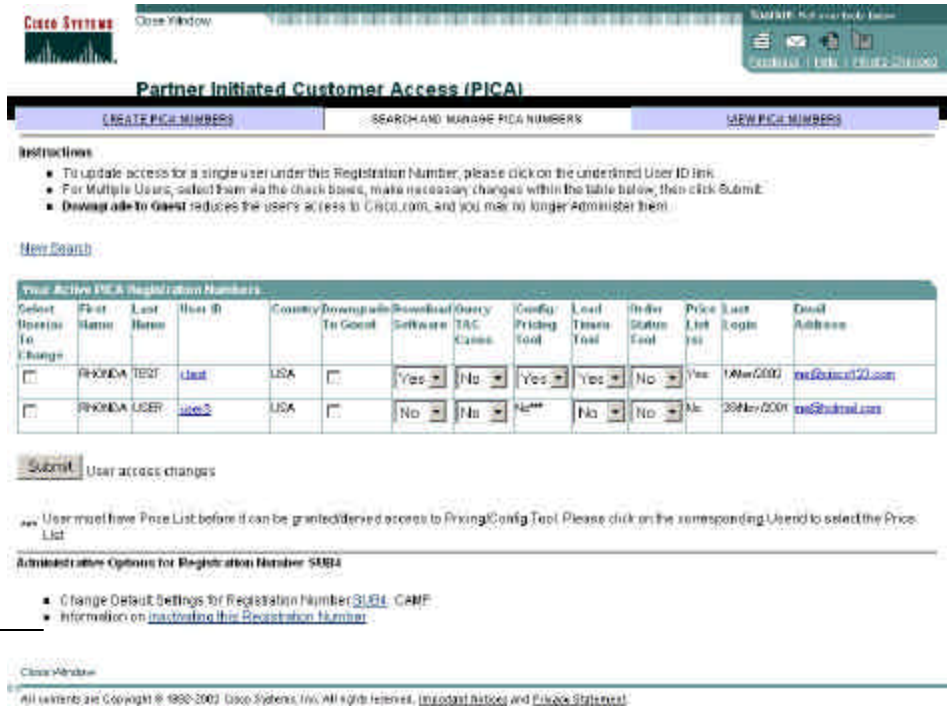
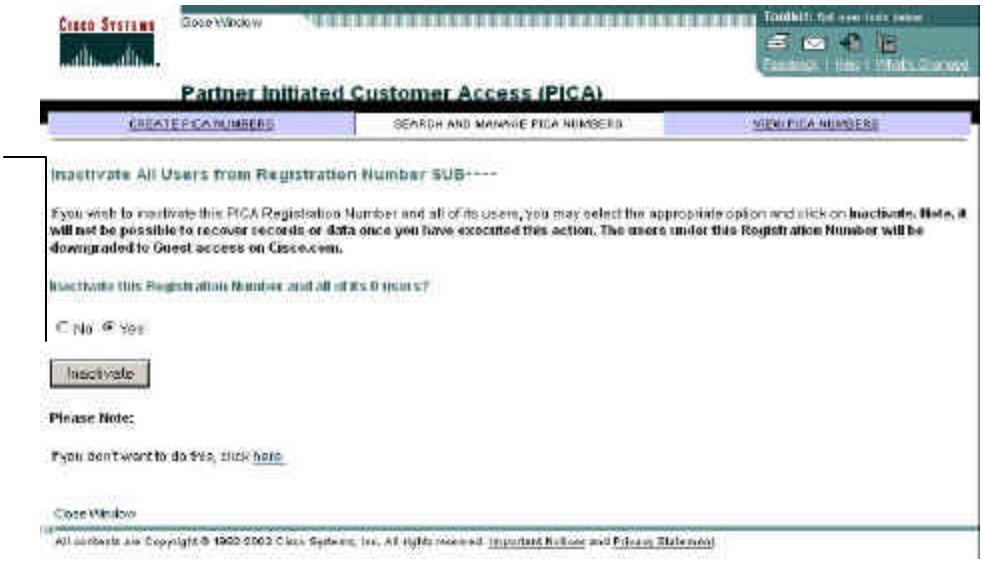


Figure I

I.1 Click on Yes
I.2 Click
Inactivate button

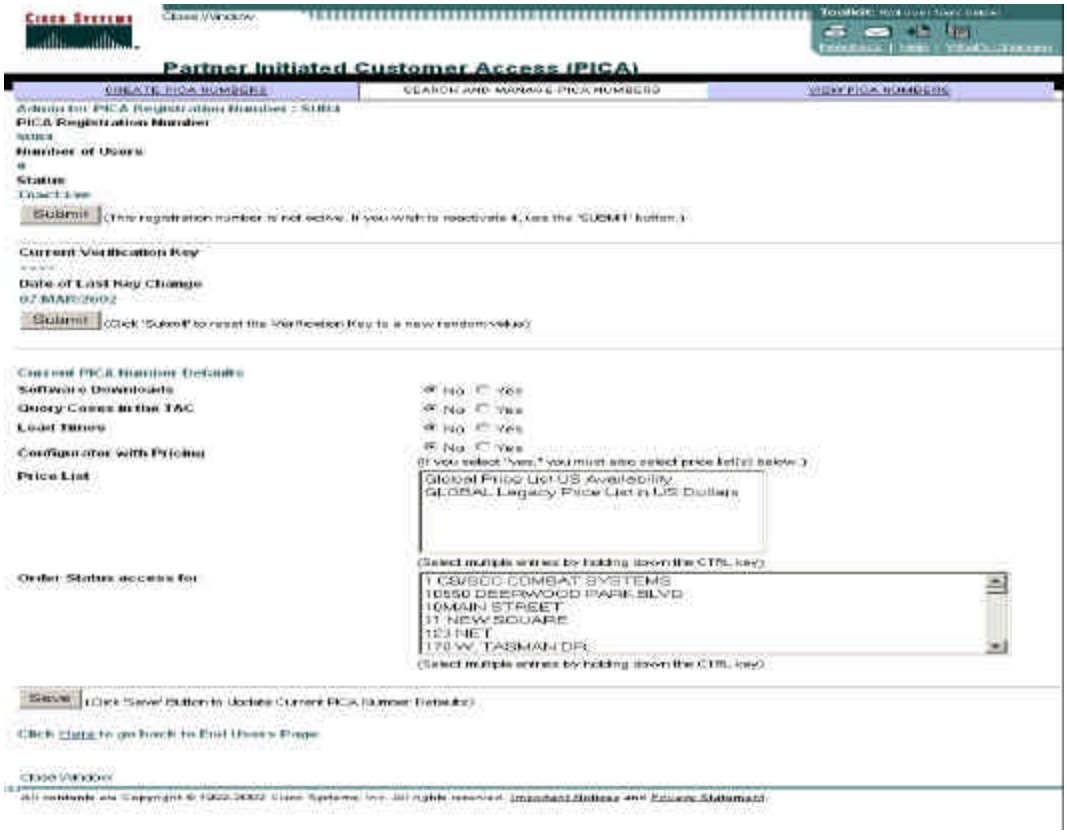


Step	What You Do
1	Select the number you would like to inactivate. (See Figure H.1)
2	Click on the link titled for **Information on inactivating this Registration Number**. (Figure H.2) The Inactivation Message page will be displayed.
3	To inactivate the PICA Number, select the **Yes** button, then click **Inactivate.** (Figure I.1 & 2) You will receive confirmation on the next screen that the PICA Number and all of its users are now inactive. Those users will now only have guest level access on Cisco.com

Reactivating an Inactive PICA Number

Once you have inactivated PICA Numbers, they will not be listed when you perform a search. If you wish to reactivate one of those numbers, you may click on the **Inactive PICA Registration Numbers** link on the top of the summary page and it will take you a list of inactive PICA Registration Numbers. If you wish to reactivate one of those numbers, you may click on it and it wi ll take you to the reactivation screen. (Figure J)

Figure J



Step	What You Do
1	To reactivate the PICA Number, click on the **Submit** button under the Status section of the administration page. It will reactivate the number, then allow you to make administrative changes to the number (change defaults, verification key, etc.)
2	Any users that were previously under this PICA Number will not be reactivated. You will need to send them the PICA Number and Verification Key again to re-register, or they may send an email to web-help@cisco.com and have their current User ID updated with the PICA Number information.

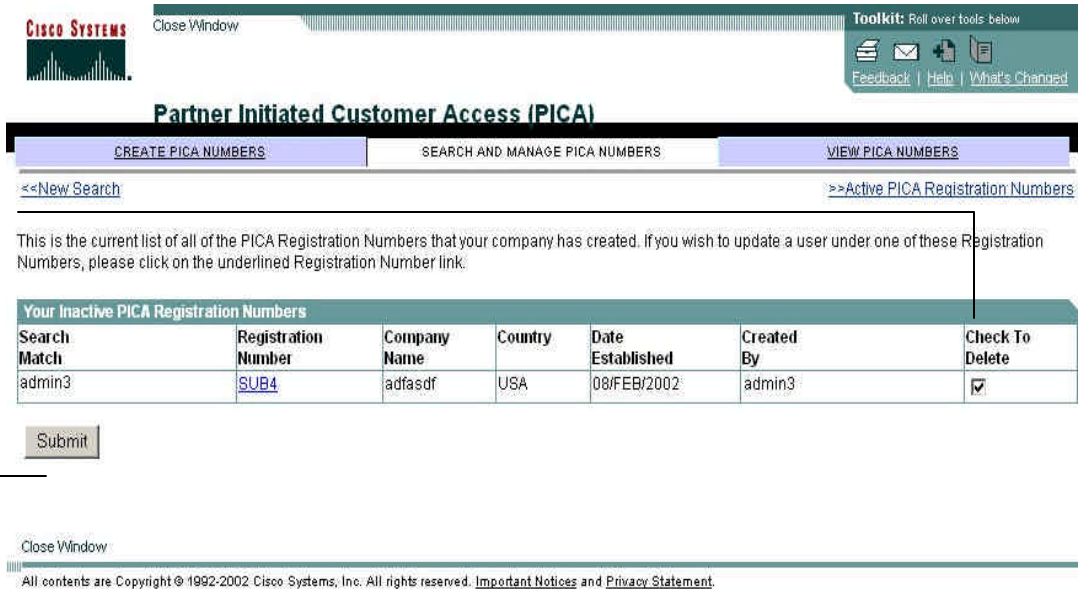
Deleting an Inactive PICA Number

If you no longer wish to have an inactive PICA number showing in your list, you may delete it permanently.

Figure K

K.1 Select number to delete

K.2 Submit request for deletion



Step	What You Do
1	From the **Your Inactive PICA Registration Numbers** page put a checkmark in the box of the PICA Number(s) you wish to delete. (Figure K.1)
2	Click on **Submit**. (Figure K.2) These numbers will be removed, and will not be available to be reactivated.

Chapter Four –

Changing End User Profiles

While you set the default of a PICA Number to allow certain access, you may wish to change this for an individual user, or multiple users under that PICA Number. Users also may forget their passwords to Cisco.com, and you have the ability to reset them. If a person leaves a customer company, and should no longer have access to Cisco.com under that company, you may need to downgrade them to guest access on Cisco.com.

Chapter Objective

- How to make changes to existing users under a PICA Number
- How to reset a user's password
- How to downgrade users to guest access

Users within your customer companies may require different types of access to Cisco.com, regardless of how you set the default options for their PICA Number. In certain cases, you may wish to make changes to a single user – in other cases you may wish to make changes for multiple users at one time.

How to Change a Single End User Profile and Reset a User's Password

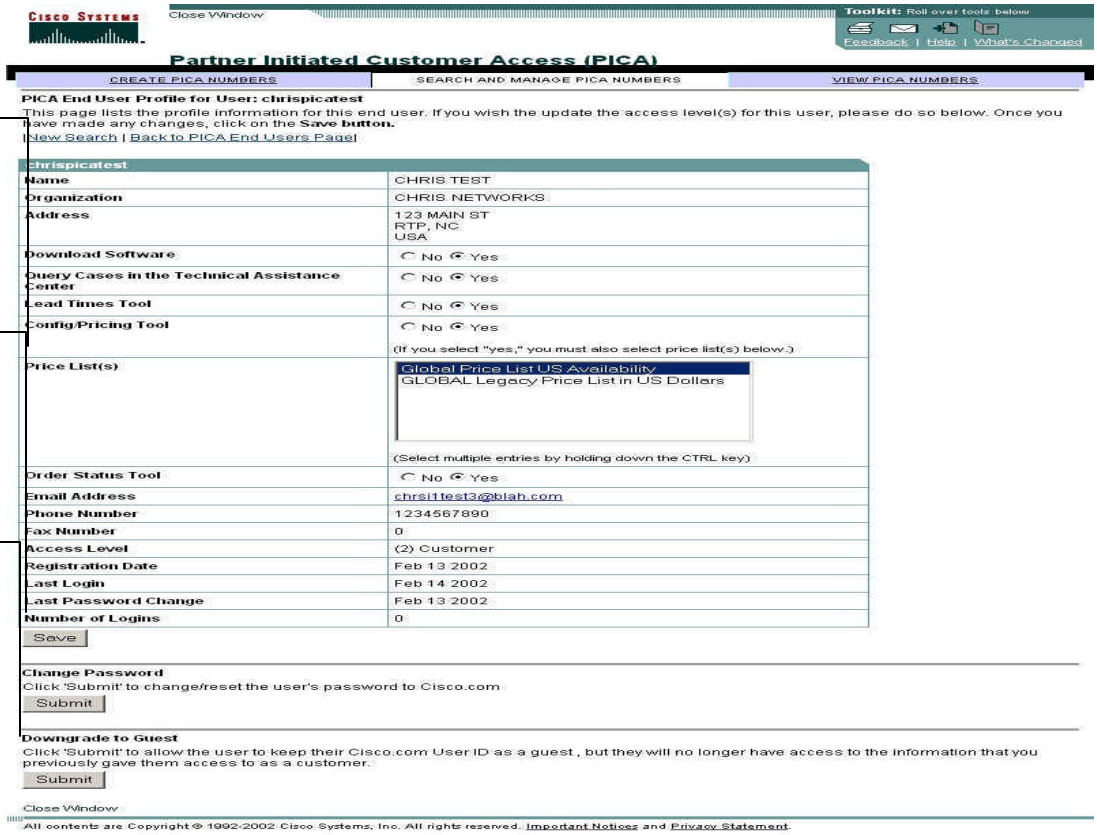
Figure L

L.1 Make changes to the profile

L.2 Save changes made to the profile

L.3 Request new password

L.4 Downgrade to guest access



Step	What You Do
1	Once on the Your PICA Registration Numbers page click on the Registration Number that the user you wish to change.
2	Click on the User ID of the user you wish to change. You will be taken to the PICA End User Profile page. (Figure L)
3	Make any changes in the table of settings for this user. (Figure L.1)
4	Click **Save** to make those changes. (Figure L.2)
5	To reset the user's password, click the **Submit** button in the **Change Password** section at the bottom of the page. (Figure L.3) You will then be taken to the page to enter a new password for the user.
6	To downgrade this one user to guest, click on the **Submit** button in the **Downgrade to Guest** section at the bottom of this page. (Figure L.4)

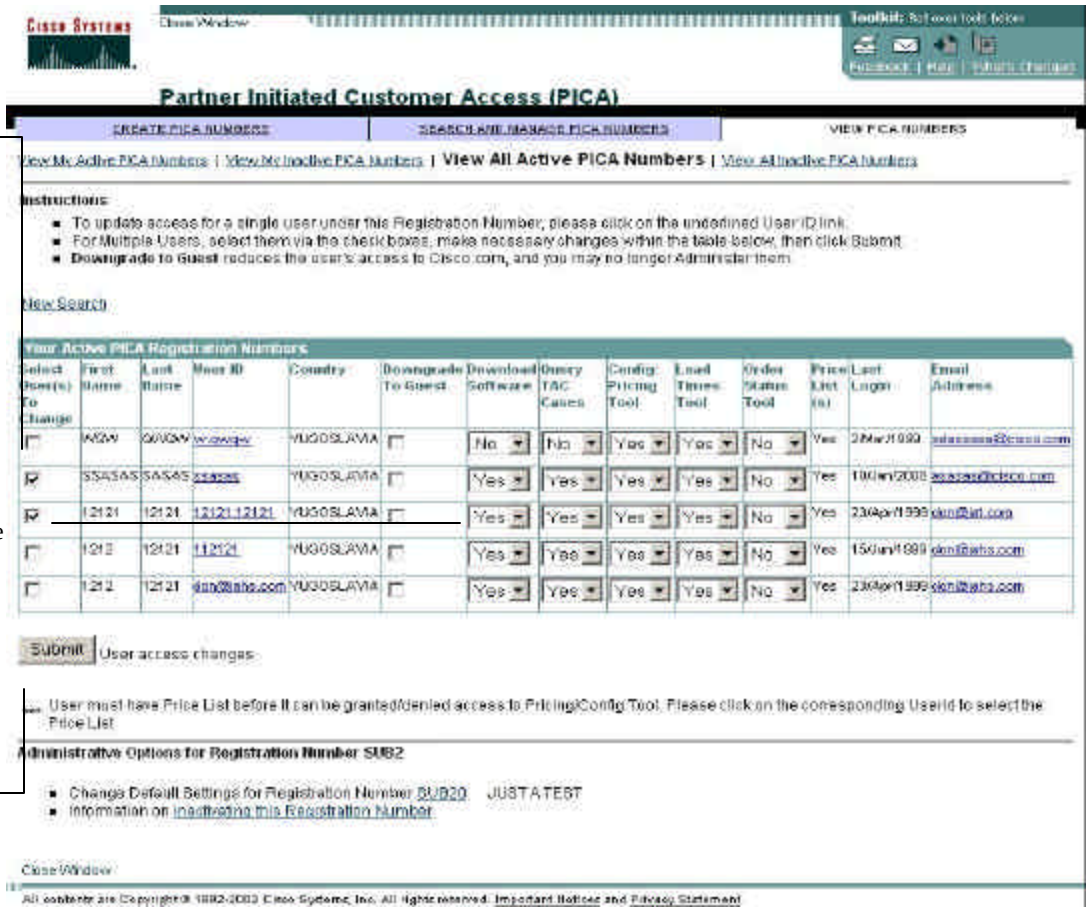
How to Change Multiple End User Profiles

Figure M

M.1 Select the boxes you would like to change

M.2 Make changes to the settings

M.3 Save your changes



Step	What You Do
1	Once on the Your PICA Registration Numbers page click on the Registration Number that the users you wish to change.
2	Select the check boxes beside the users you wish to change (Figure M.1)
3	Make any changes using the pull-down Yes/No menu boxes. (Figure M.2)
4	To make these changes, click on **Submit** User access changes. (Figure M.3)
5	You may also select multiple users at one time, and check **Downgrade to Guest** then **Submit**. Please note, once you downgrade them, you may not upgrade them. To upgrade a user's access, please contact web-help@cisco.com

Chapter Five –

Granting Technical Assistance Center Access

Cisco's Technical Assistance Center (TAC) is available to you as a Partner, but is not available to your end customers unless you grant them that access. There are certain rules around what your end customer can and cannot do within the TAC web pages on Cisco.com .

Chapter Objective

- To acquaint you with options your customer may receive within the TAC
- How to allow your customers to view (query only) TAC cases you open for them with Cisco.

Cisco's TAC website is located at http://www.cisco.com/tac

Your PICA customer may login to this page and have access to many tools and services based on the access that you grant them through the PICA Admin Tools.

Features Your Customers Will Automatically Have as PICA Users

- Top issues, TAC Tech Tips, and sample configurations
- Technical information and documentation
- Open Questions & Answers Forum
- Troubleshooting Assistant
- Many other tools to assist with troubleshooting

Features You Decide to Entitle to Customers

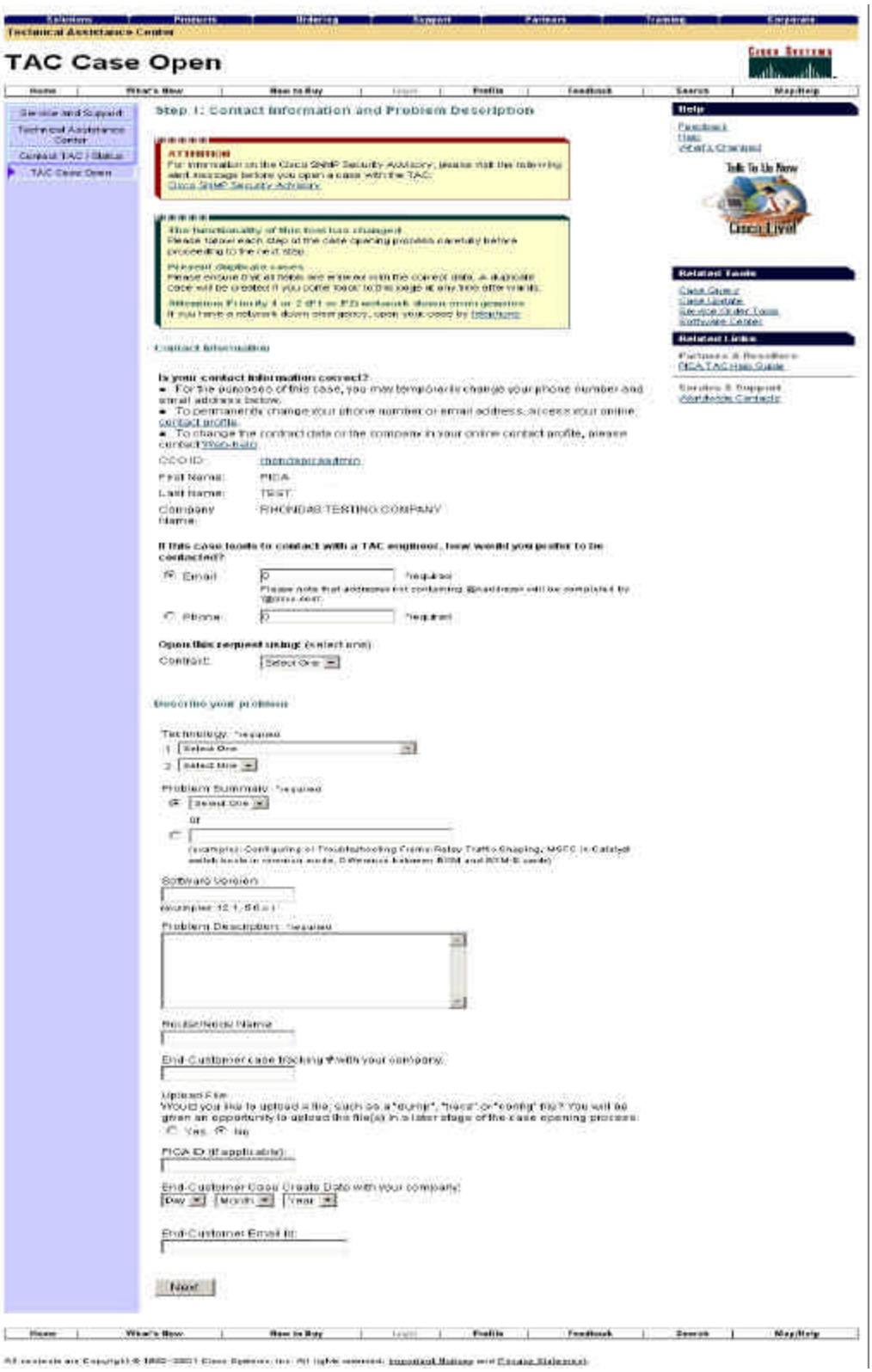
- Software Center (The ability to download software from Cisco.com)
- Software Bug Toolkit (Part of Software Center access)
- Ability to query TAC cases associated with their PICA Number within the TAC website

In order for your customers within a company to be able to view cases within the TAC website (they may query cases only – not open or update,) you must:

1) Grant them access to Query TAC Cases.
2) Enter their PICA Number in the required field when opening a case online (Figure N) The field is called **PICA ID** and is near the bottom of the **Case Open** screen.

Note: If you call into the TAC via the phone, rather than opening the case online, be sure to tell the agent the PICA Number you wish to apply to that end customer's case so that they may still be able to view the case online.

Figure N


TAC Case Open
Step 1: Contact Information and Problem Description
Contact Information
Describe your problem
Next

Chapter Six –

Granting Commerce Access

Cisco's Internet Commerce Tools are available to you as a Partner, based on your service contract agreement(s) with Cisco, but are not available to your end customers unless you grant them that access under the PICA Program.

Chapter Objective

- Outline the Internet Commerce Tools that you may grant access to for your customers.

You have already seen in the previous chapters the Commerce Options that you may grant to your customers.

These options are:

- **Check Lead Times** – Access to the Lead Times Tool.
- **Configure Cisco Product with Pricing** – Access the Configuration Tool and the Pricing Tool.
- **Select Price List for User** – If you have given them access to Configure Cisco Product with Pricing, you must also select the Price Lists they are allowed to see.
- **Grant Order Status access** – Access to view orders that you have placed online for the customer, by indicating them as the End User for the order.

There are a few rules to be aware of when you administer rights to the Commerce Options with regards to your PICA end users.

Rules for PICA Commerce Options

- In order to be able to give any of the Commerce Options to your customers, you must first have those options within your own User ID profile. If you need assistance with this, please contact Customer Service.
- For granting Order Status, in order for your end customer to be showing in the list under **Grant Order Status Access for**, you must have already placed an order for them where you selected that company as the End User of the order.
- Also under Order Status, if a PICA Number has Order Status as **Yes**, and then you choose to remove it, it will also remove the Order Status access of all the end users under that PICA Number. In order to grant them Order Status again, you must first grant it to the PICA Number, and then grant it back to the individual users under the PICA Number.

Chapter Seven –

Registering Your Employees for Cisco.com Access

The PICA Program is used to generate PICA Registration Numbers for your customers. The PICA Administrator Tool should not be used for generating PICA Numbers for your own company's employees. Your colleagues should use your company's Cisco service agreement, or purchase order or sales order, or contract number to register online. Your company's Cisco contract number should never be given to any of your end customers.

Chapter Objective

- To give the procedure on how other employees from your company may register for Cisco.com access, and advise how they may become a PICA Administrator.

How Users for Your Company Can Register for Cisco.com Access

Users from your own company can register for Cisco.com under your company's service contract agreement. If you do not know this number, you may find it a few different ways:

Step	What You Do
1	Contact your Cisco Account Manager
2	Login at http://www.cisco.com, then click the **Profile** button along the top black navigation bar. Your contract number will be listed in your User Profile.
3	Once you know the contract number for your company, your colleague may go to http://www.cisco.com, click **Register**, and follow the registration instructions to receive their own Cisco.com User ID.

How to Become a PICA Administrator

If another person at your company wishes to become a PICA Administrator

Step	What You Do
1	Ask if they already have a Cisco.com User ID. If they do they can proceed to Step 2.
2	Then they will go to http://www.cisco.com/go/PICA. The **PICA** home page is displayed.
3	Select the link for **Register to be a PICA Administrator**. The **PICA Administrator Registration** page will be displayed
4	Enter your comments, change the email address if necessary, and click **SUBMIT**. An email is then sent to the PICA Support Team for approval. Please allow 48 hours for a response. If you do not receive an response in 48 hours, contact web-help@cisco.com or 800 553 2447.

Glossary

Active PICA Number – A PICA Number that is able to be used by an end customer to register for Cisco.com access

Configuration – The process of choosing different options (cables, memory, cards) that will be included in the product you are purchasing.

Default – The overall settings within a PICA Number that determine end user access.

End User – The customer of a Partner, the recipient and user of products.

Entitle – Allow or grant access to a specific tool or option.

Inactivate – Make the PICA Number inactive. Reduces all current users under that PICA Number to guest, and no one may use that PICA Number to register for access.

PICA – Partner Initiated Customer Access

PICA Number – The unique number that is used to manage access to each individual end user company. May also be called a PICA Registration Number.

Reactivate – Make the PICA Number active again. New user will now be able to use the number to register for Cisco.com access, and previous users under the PICA Number will need to re-register.

Registration Number – With regards to PICA, it is the unique number created for each end user company. It is combined with a Verification Key to allow users to register for their own Cisco.com User ID.

TAC – Technical Assistance Center

User ID – An individual ID that a person uses to log into Cisco.com

Verification Key – With regards to PICA, it is the key that is combined with a PICA Number to allows users to register for their own Cisco.com User ID.

Additional questions regarding the PICA Admin Tool may be sent to: web-help@cisco.com

Fore more information on the PICA program, please visit www.cisco.com/go/pica-overview

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