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Cisco Services Access Management

User Guide
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For Customer and Partner Use.

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Welcome to Cisco Services Access Management

Cisco Services Access Management enables Cisco's customers and partners to self-administer role-based user access to multiple Cisco Service programs. Based on the concept of Delegated Administration, users request to associate their individual Cisco user accounts with their company and request access roles in order to obtain company-level entitlements. All association and access requests are approved by the "Delegated Administrator," a trusted person at the customer or partner company who assumes responsibility for managing user access on behalf of their company.

Cisco Services Access Management provides proactive access management aimed at enabling self-service access management, allowing customers or partners to run their business more efficiently.

This document highlights the following major functional areas of Cisco Services Access Management:

- Introduction to Delegated Administration
- Company and Administrator settings
- User-Company Associations
- User-Role Assignments
- Additional Administrators

Browsers Supported by Cisco Services Access Management

The following are the recommended browser applications for accessing Cisco Services Access Management. Generally, the latest version of each is best.

- Firefox
- Chrome
- IE 11

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Overview

Cisco Services Access Management

Cisco Services Access Management provides for "party-centric" role-based access to Cisco Smart Services. Rather than requiring a contract administrator to explicitly add a user to each and every contract to which they should be able to get support, party-centric access allows for all users that are associated to the customer or partner "party" to automatically get access to the support services to which their company is authorized. The level of access can be further filtered or controlled through the assignment of specific access roles, allowing for a tailored user experience.

NOTE: The difference between company and party is that a company is an identifiable entity with a legal name which is vetted through systems such as Dun & Bradstreet. A company can be assigned multiple parties, each with a different physical location, a separate Smart Net Total Care portal instance, or a different section of the company's network.

Benefits of using Cisco Services Access Management

Cisco Services Access Management is designed to flexibly accommodate companies of various sizes (based on the number of locations and users) and allows for centralization or decentralization of administration according to each company's desired policy.

When a trusted person is nominated as the first Delegated Administrator (DA) for a company, the Delegated Administrator has the option to nominate additional company administrators, or set up multiple branch locations that may be administered separately by multiple administrators. This administrative structure may be changed over time, based on growth and usage by additional service programs.

Delegated Administration allows for the Delegated Administrators to independently decide who in their company should have access to each Cisco Service program, and which roles to assign to each user. Rather than contacting Cisco to submit access requests, the Delegated Administrator has complete control to self-administer user access for both internal users who work for the company and external users who might assist in managing the company's devices.

Through self-service administration, individual users have the ability to submit a request to associate their User ID to their company, and to request role assignments in order to access Cisco services resources. The Delegated Administrator will then review and either approve or deny those requests. Alternatively, the Delegated Administrator can explicitly make the user associations and assign the roles, without waiting for the user to submit a request.

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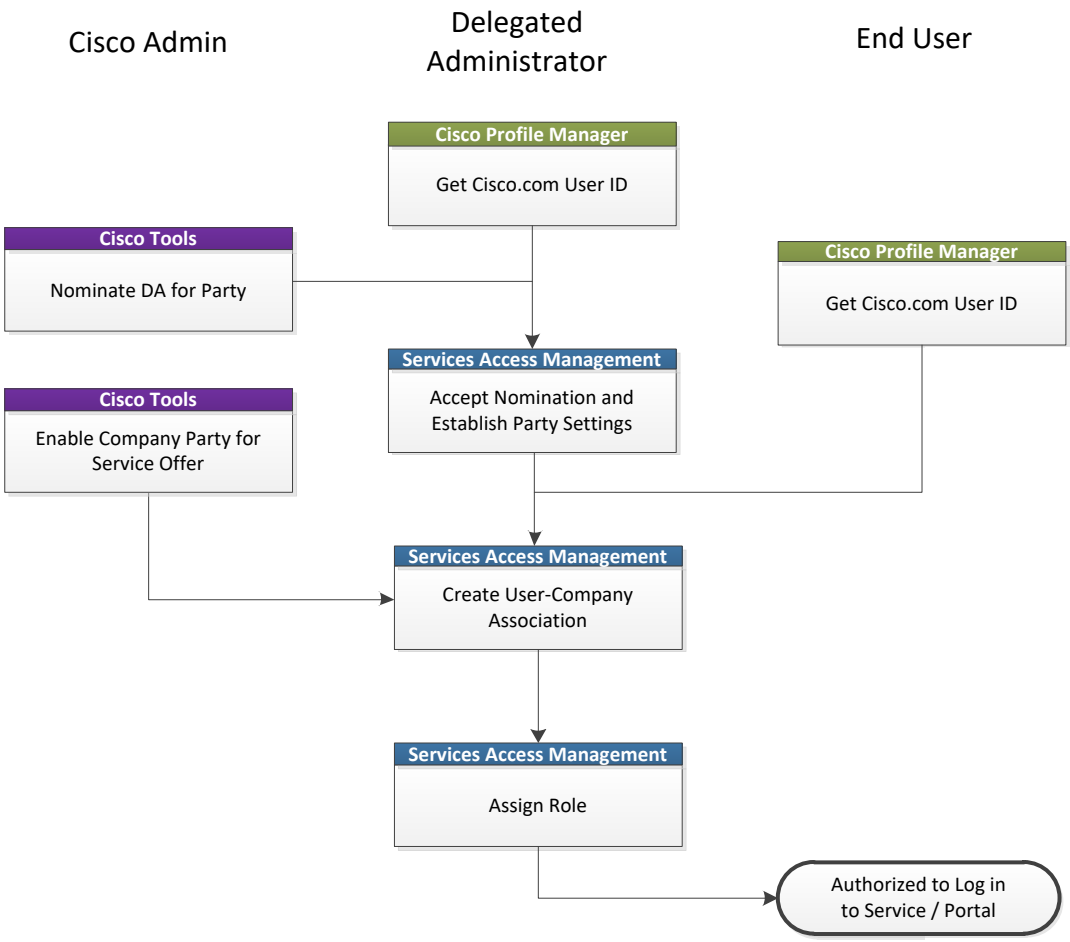
Introduction to Delegated Administration

Delegated Administration allows for user self-service access, providing a structure to enable customers and partners to assume greater control over “who gets access to what”.

Depending on the size of the company or the number of users to manage, one Delegated Administrator can manage all user requests, or nominate additional Delegated Administrators to manage the load.

The sample flows below show two basic models of how a Delegated Administrator can manage user access, through the use of Cisco Services Access Management and Cisco.com Profile Manager applications.

Default Administration Process Flow



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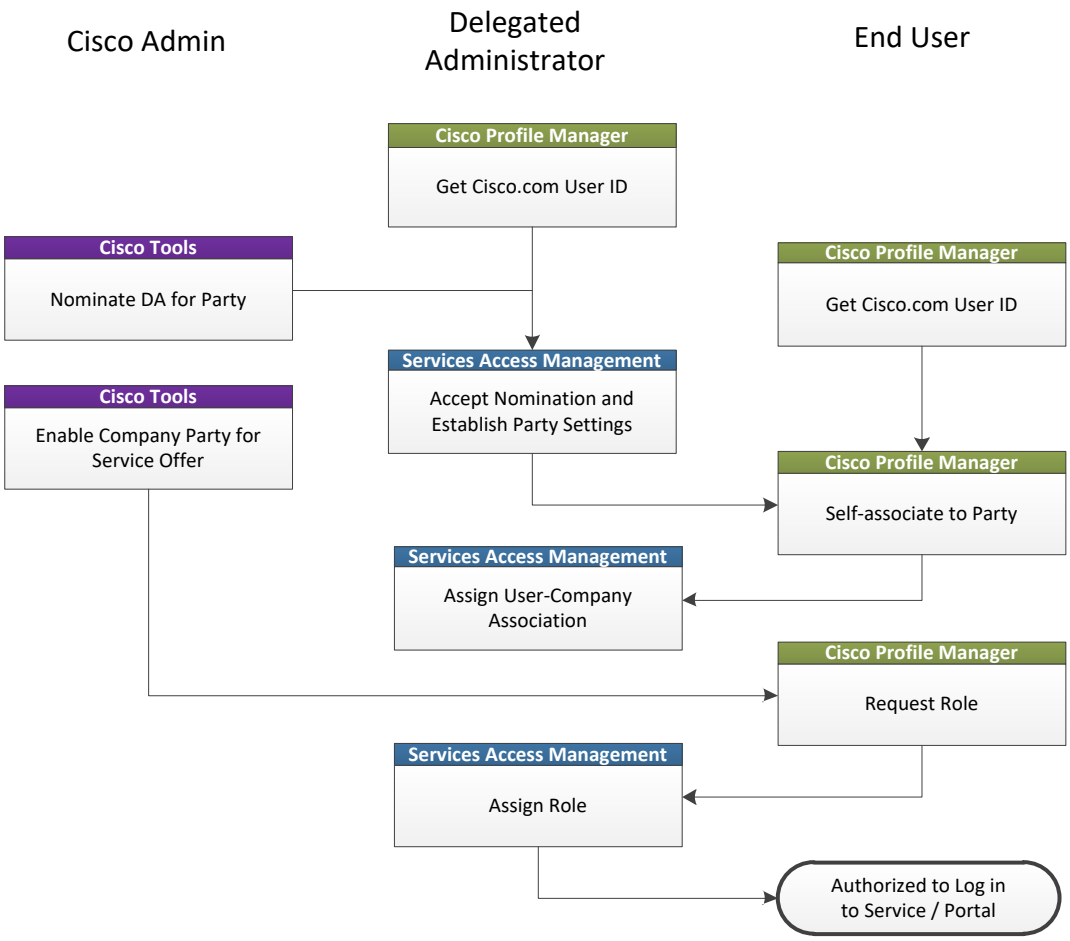
User Self-association Process Flow



Nomination of a Delegated Administrator

A known and trusted person who works for the partner or customer company can initiate the Delegated Administrator nomination process through the Smart Net Total Care self-registration process. Optionally a Cisco employee with an Administrator role in the Cisco Services Access Management application can nominate a Delegated Administrator. The latter is typically requested by way of a TAC case or a request from the partner's or the customer's Cisco account representative.

In both instances, a verification process ensures the person nominated as the Delegated Administrator is associated to the company, and the company has a Cisco Smart-enabled contract installed at one of the company locations.

After accepting the Delegated Administrator nomination and terms and conditions for that role, the nominee is granted access to the Cisco Services Access Management application. Delegated Administrators can use Cisco Services Access Management to associate valid users to their company and assign them (or themselves) roles to gain access to the protected Cisco Services that are available to that company. The trusted relationship

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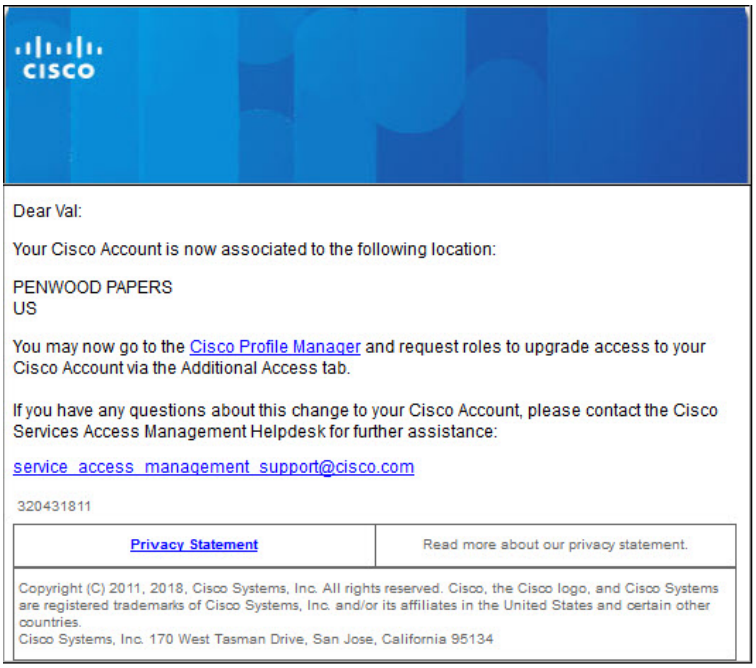
between the Delegated Administrator and Cisco must be maintained on an ongoing basis to ensure only eligible users have access to company information.

Acceptance of Delegated Administrator Nomination during First Login

The nominee will receive email notifications informing them that their Cisco account has been associated to their company record, and that they have been nominated to become the Delegated Administrator for their company.



Dear Val:

Your Cisco Account is now associated to the following location:

PENWOOD PAPERS
US

You may now go to the Cisco Profile Manager and request roles to upgrade access to your Cisco Account via the Additional Access tab.

If you have any questions about this change to your Cisco Account, please contact the Cisco Services Access Management Helpdesk for further assistance:

service_access_management_support@cisco.com

320431811

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A sample email nomination letter is shown below. The nominee is directed to click on the Cisco Services Access Management link in the email nomination letter to view the terms and conditions for becoming a Delegated Administrator for their company.

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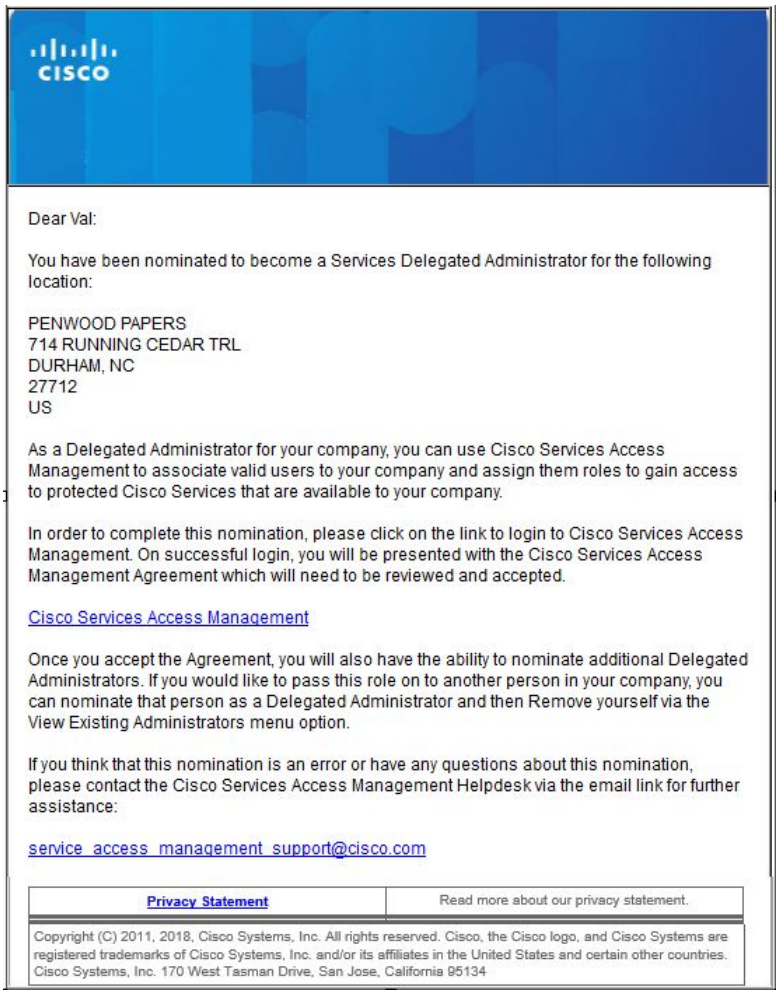

Dear Val:

You have been nominated to become a Services Delegated Administrator for the following location:

PENWOOD PAPERS
714 RUNNING CEDAR TRL
DURHAM, NC
27712
US

As a Delegated Administrator for your company, you can use Cisco Services Access Management to associate valid users to your company and assign them roles to gain access to protected Cisco Services that are available to your company.

In order to complete this nomination, please click on the link to login to Cisco Services Access Management. On successful login, you will be presented with the Cisco Services Access Management Agreement which will need to be reviewed and accepted.

Cisco Services Access Management

Once you accept the Agreement, you will also have the ability to nominate additional Delegated Administrators. If you would like to pass this role on to another person in your company, you can nominate that person as a Delegated Administrator and then Remove yourself via the View Existing Administrators menu option.

If you think that this nomination is an error or have any questions about this nomination, please contact the Cisco Services Access Management Helpdesk via the email link for further assistance:

service_access_management_support@cisco.com

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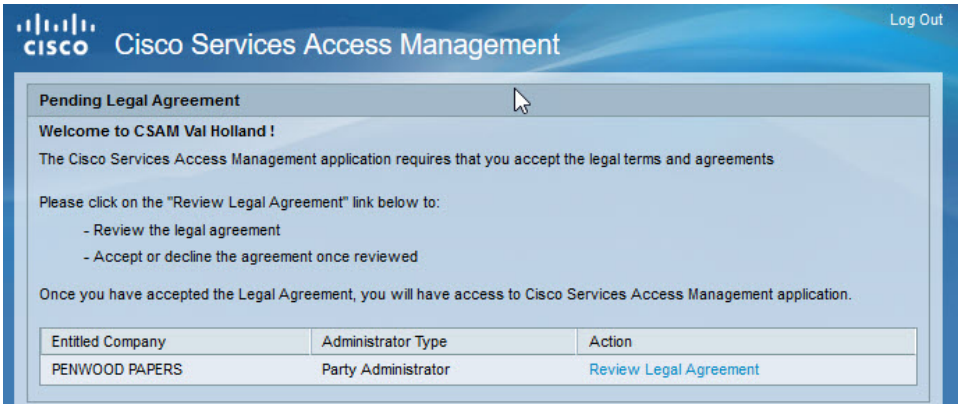
When accessing Cisco Services Access Management for the first time, the system displays the 'Pending Legal Agreement' page. The nominee has the option to **Download Agreement as PDF** via the link or view the agreement on their screen.



NOTE: The system will log out the user if this screen remains idle and the Delegated Administrator does not click the Review Legal Agreement link within one hour. The solution is to completely log out of Cisco Services Access Management, close the browser window, and log in again in a new browser window.

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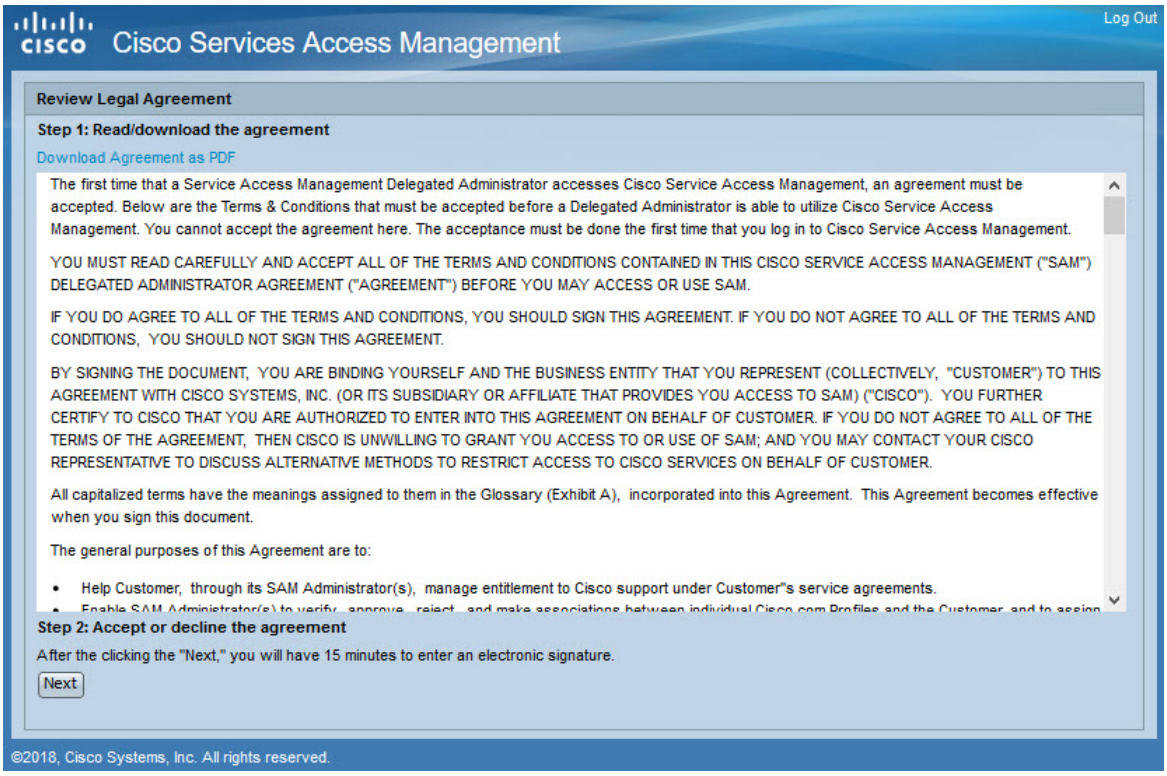

After reviewing the responsibilities outlined in the legal agreement, and if the nominee agrees to accept the terms and conditions, the nominee clicks “Next” to enter their electronic signature and accept the agreement.

> The nominee may see a pop-up window to ask if they will allow www.docusign.net access to their location information. Allowing Location Access is optional and their decision to allow www.docusign.net to access their location information will not affect their ability to sign the agreement and use Cisco Services Access Management.

The Cisco Services Access Management Agreement is then displayed in a DocuSign document, as shown below. To proceed with agreement acceptance, the nominee clicks on the checkbox to agree to use electronic records and signatures, as highlighted below.

If using electronic records and signatures is not acceptable, the nominee should contact the sender of their nomination email or their account manager.

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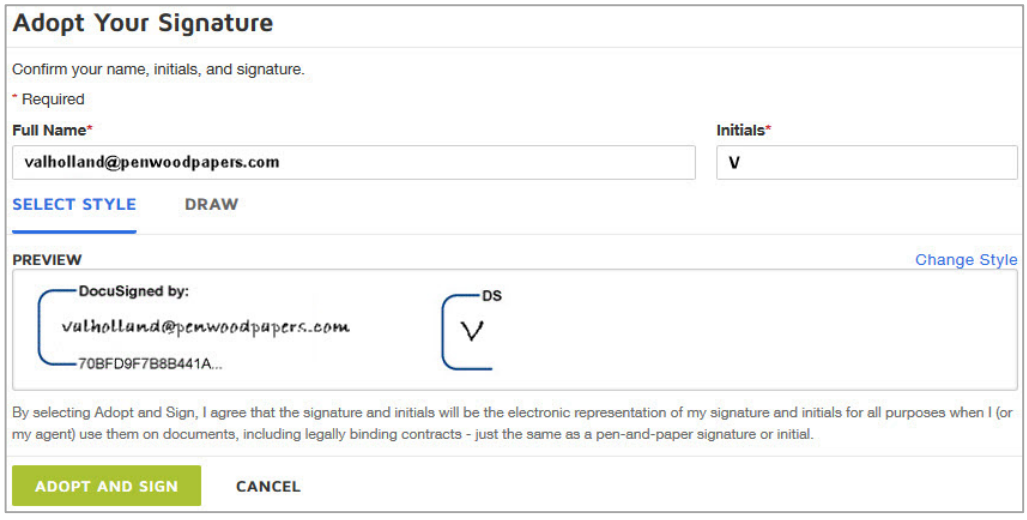
NOTE: If the nominee is new to DocuSign, they will be prompted to verify their email address and create a signature style. Nominees who have previously used DocuSign may select one of their existing signature styles.



After selecting their signature style, the nominee clicks the “Adopt and Sign” to continue. The nominee then clicks “**Start”** to go to the signature page of the agreement.

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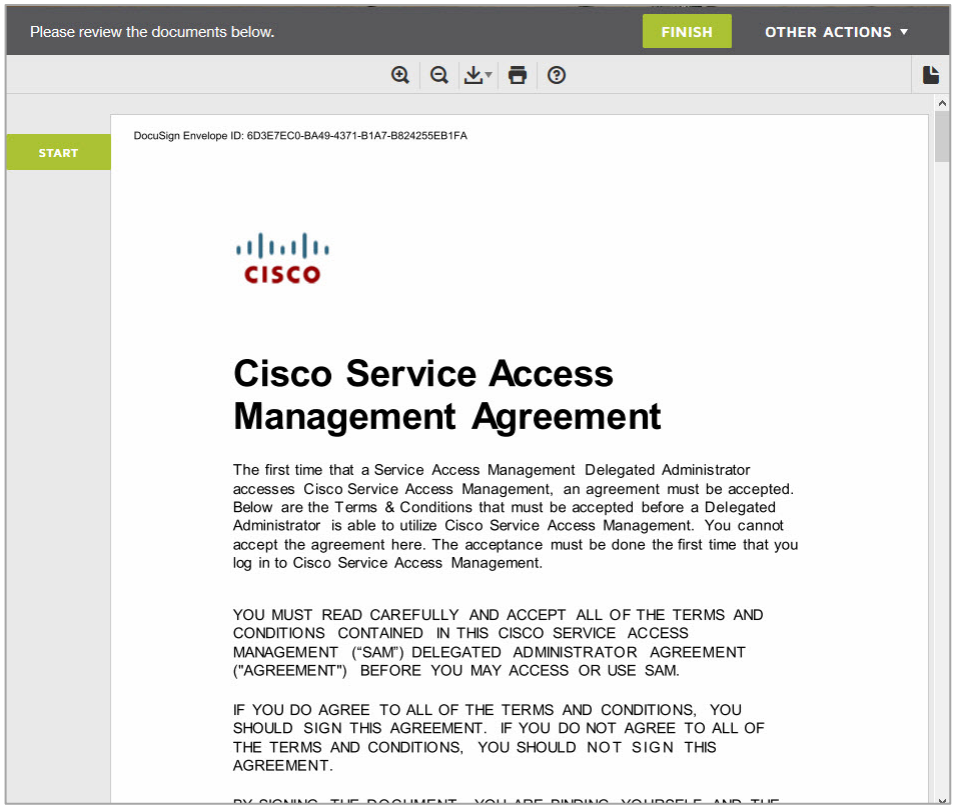

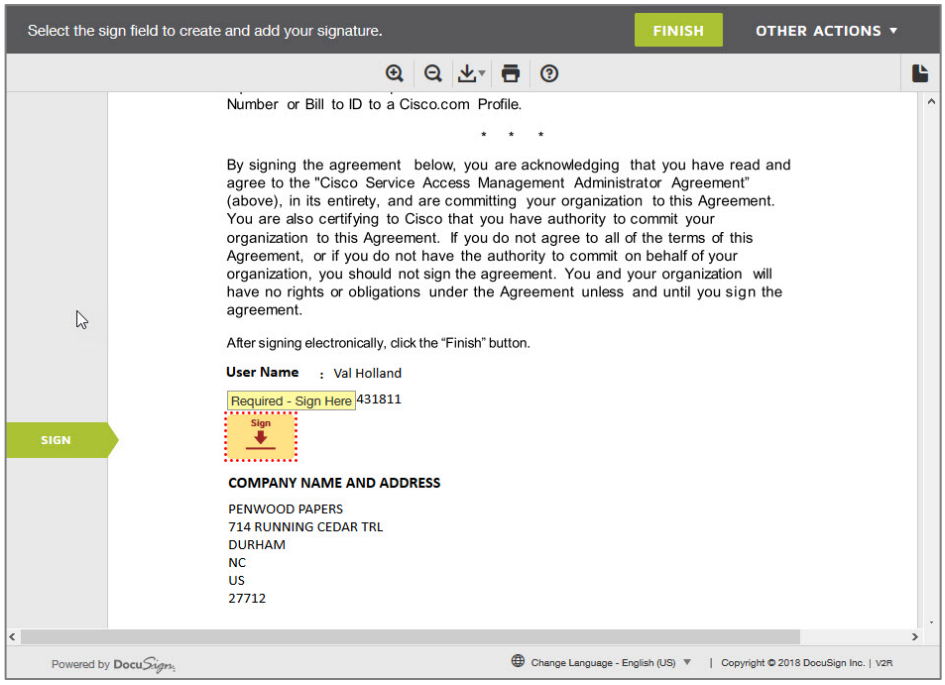

The nominee clicks the Sign button if they accept the terms and conditions of the legal agreement. The system then displays the Signature Applied confirmation.

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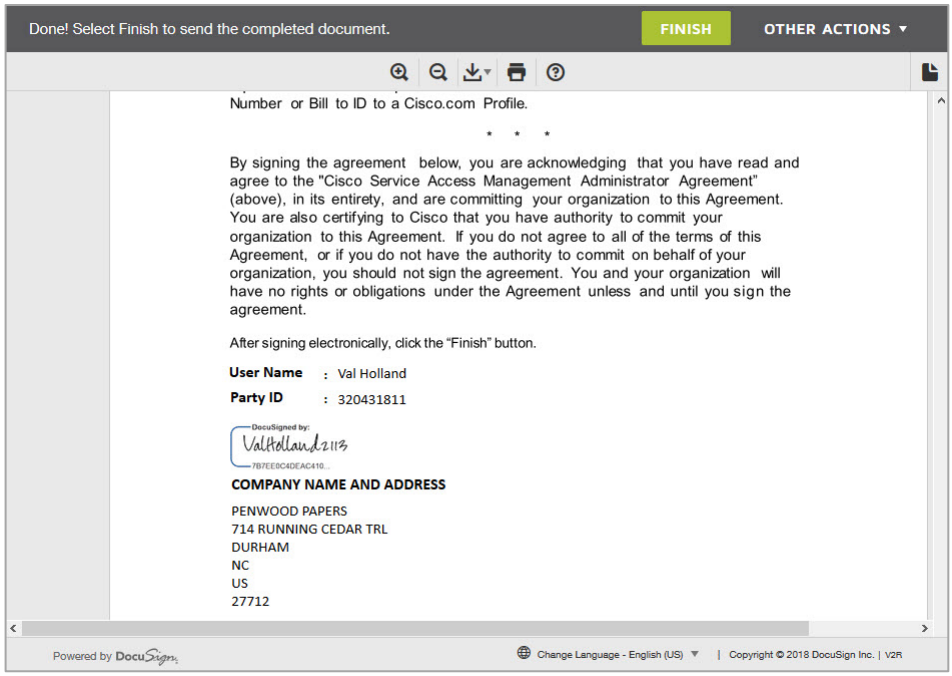
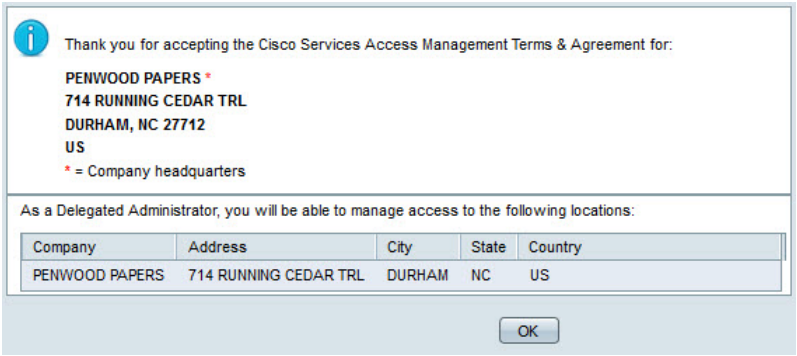


From the confirmation page, click “Finish” to send the completed document.

After completing the DocuSign process, the Delegated Administrator is returned to Cisco Services Access Management, where a confirmation pop-up is displayed.



The new Delegated Administrator clicks “OK” to complete the agreement and log-in to the Cisco Services Access Management application.

NOTE: The Delegated Administrator role only provides access to associate users to the Delegated Administrator’s company and assign service access roles to users. To also have access to specific Cisco Business Services, the Delegated Administrator must assign themselves one or more roles.

The Home page displays icons for the three main functions performed by the Delegated Administrator. These three functions, along with additional functionality, are also available from the drop-down lists at the top of the page.

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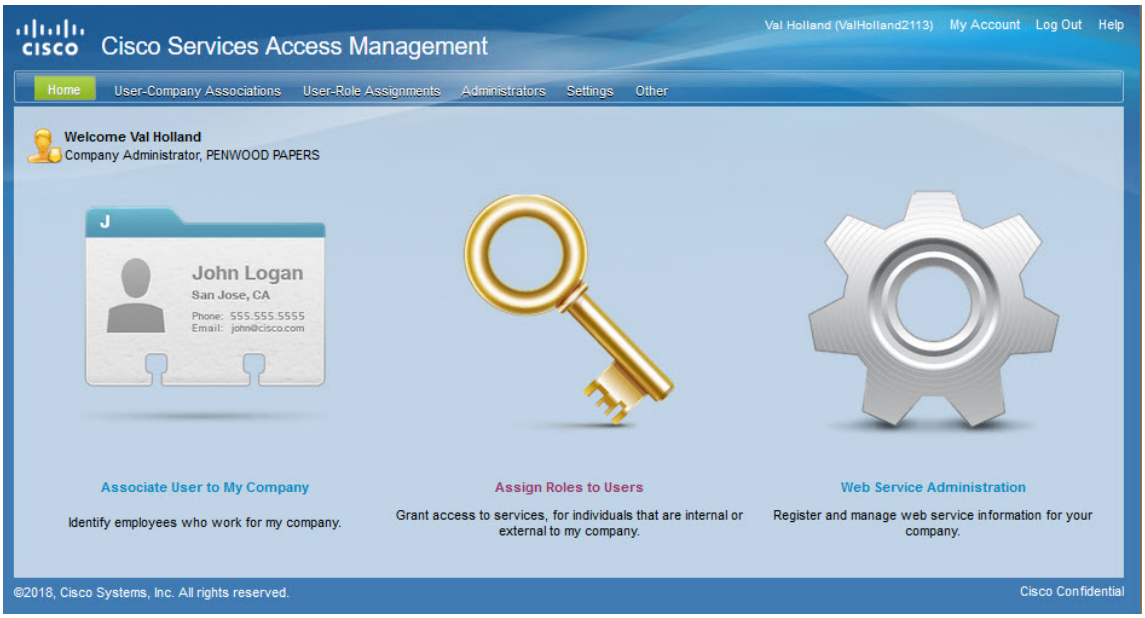

Establish Company and Administrator Settings

Cisco Services Access Management may be tailored to function in a way that best fits with the Delegated Administrator's company size, structure, and access management policies. The Delegated Administrator can establish both company-wide settings and administrator-level settings that control how individual users request association to their company, and how each Delegated Administrator is notified to take action.

The Delegated Administrator can establish the company settings by providing the criteria for "self-association" to the company. Self-association refers to the scenario where users from the company will request association to the company using the Cisco Profile Manager application from the Cisco.com site. The company settings established in Cisco Services Access Management are used to decide approval criteria for these user company association requests.

Cisco Services Access Management allows Delegated Administrators to:

- Specify valid email domains allowed,
- specify if approval will be based on user's address matching the company address, or
- generate a unique company passcode that users must specify while requesting company association.

The details specified for the company in Cisco Services Access Management will be validated whenever a user requests for company association using Profile Manager.

Delegated Administrators can establish the approval settings to either manual or automatic based on these criteria specified for the company. This will allow Delegated Administrators to have a tightly controlled or a flexible approval process.

In Cisco Services Access Management, the Delegated Administrator can also establish notification settings based on their individual requirement:

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- Get notified for every user-submitted request
- Receive a daily summary of requests
- Choose to not receive any notifications

Company Association Settings

Initially, each Cisco customer or partner company is profiled as a single location. Additional locations and administrators can be added as needed, for any locations under that company hierarchy

Cisco Services Access Management provides three ways to help direct a user's company association request to the correct company, and to the correct administrator for review and approval:

- Email domain matching
- Company passcode
- Company name and address search

The Delegated Administrator can flexibly control the user self-association process by establishing one or more of the above company association settings.

Email Domain Matching

If the company has its own email domain(s), and all users register on Cisco.com using their company email address, then the Delegated Administrator can leverage email domain matching to enable users to easily associate, and simultaneously prevent other users from attempting to associate to the company.

Company Passcode

If the company does not have its own email domain, the Delegated Administrator can prevent unknown users from attempting to associate to the company by establishing a company-level passcode, which can then be shared internally throughout the company. The use of a company passcode can also be used to eliminate the need for a user to search for their company record by name and address.

Company Name and Address

If the company is relatively small and does not have multiple locations, or if the other options do not meet the needs of the Delegated Administrator, users can be allowed to request company association by searching on company name and address.

Administrator Notification Settings

Each Delegated Administrator can customize how and when they are notified of pending self-association and role assignment requests. Used in conjunction with the company association settings, this allows each company to tailor their access management process and policies, with the ability to establish complete self-service access that is "managed by exception," or a more restrictive policy that requires explicit, directed administration.

Set Up Company Association Rules

Use the top menus to navigate to "Settings→ Change Company Association Rules". Initially, there will be no records of any association rules set up for the company.

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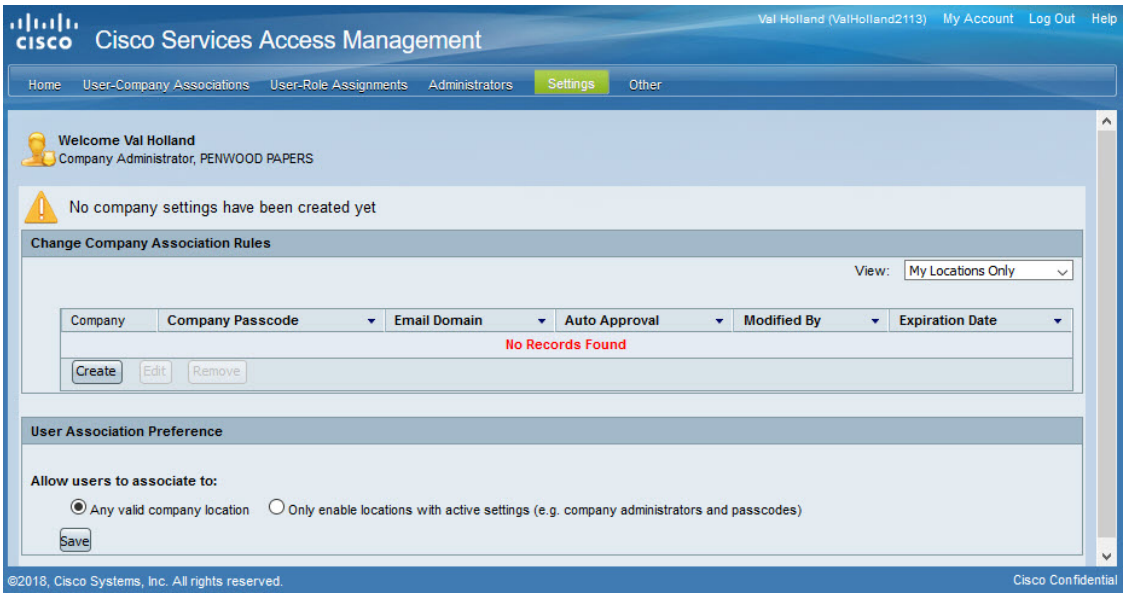

For those who are Delegated Administrators for their company headquarters, the system will display the User Association Preference section. This setting helps control which company location(s) with which the users can request association. The two options are:

- **Any valid company location** — Users can request association to any valid locations of the Delegated Administrator's company, even those without a company administrator.
- **Only enable locations with active settings (e.g. company administrators and passcodes)** — *The recommended option* — Users can request association only to company locations that have an active administrator. Selecting this option allows the Delegated Administrator to manage user-company associations.

Click the Create button to set up the company association rules for the Delegated Administrator's location or multiple locations of the company.

From the "Step #1: Manage Location Options" page, choose the appropriate radio-button option to either:

- ***Select Specific Locations*** — The best choice for companies with a small number of locations being managed.
- ***Search for a Specific Location*** — The preferred option to find the specific location to manage when the company has many locations. This eliminates having to scroll through a list of locations.

Based on the selection, the system displays a list of company locations. Select the preferred location to manage, and then click "Next".

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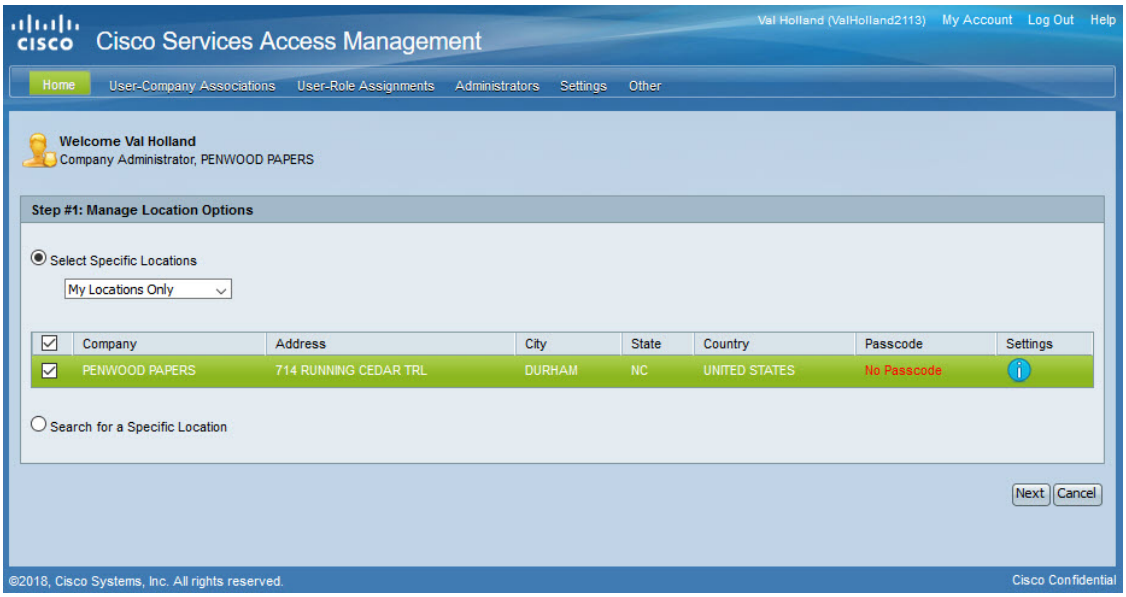
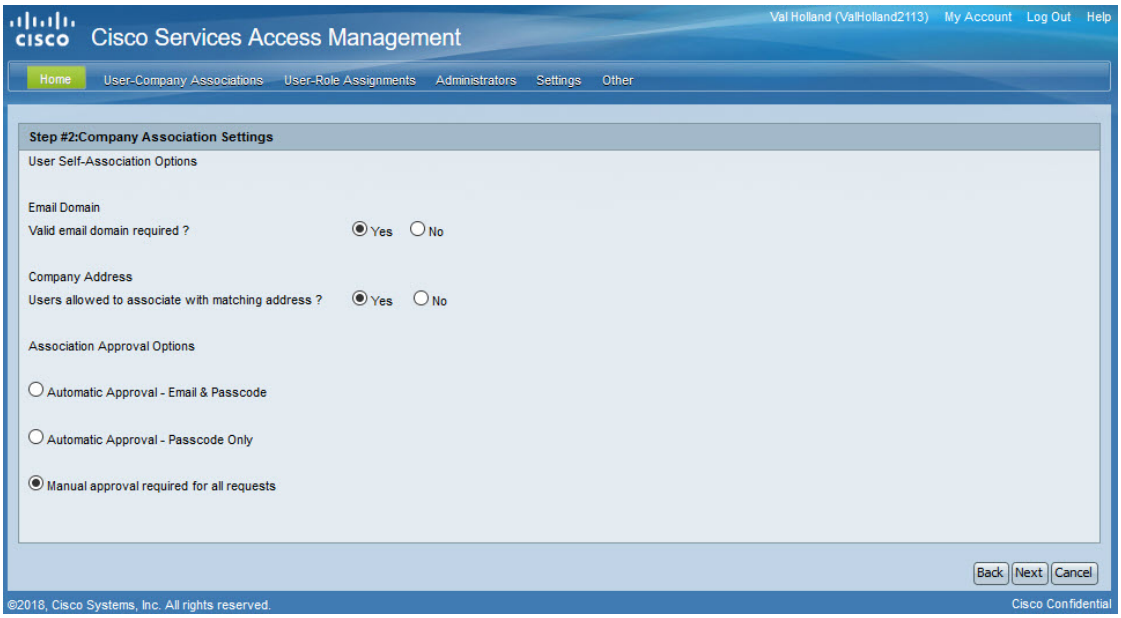


The "Step #2: Company Association Settings" page allows the Delegated Administrator to define user self-association rules that apply to all locations of their company.



User Self-Association Options

- ***Email Domain*** — Click Yes to leverage the email domain-matching feature. This enables users who register in Cisco.com using their company email address to associate with the Delegated Administrator's company, while preventing other users from doing so.
- ***Company Address —*** Click Yes to allow users to submit a company association request based on company name and address. This option is only recommended when used in conjunction with email domain matching or a company passcode. This may be changed later based on company needs, depending on the size of the company and the number of managed locations.

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The following table describes the impacts to the self-association process, depending on the options selected.

Email Domain Matching	Company Address Matching	Impact on Self-Association requests via Profile Manager
Yes	Yes	Only users who registered in Cisco.com with their company email address will be able to request company association, and will also be able to search for a specific company location based on company name and address. Best choice for a large company with many locations being independently managed by multiple Delegated Administrators.
Yes	No	The company will not appear in searches by users outside of the Delegated Administrator's company (or who registered in Cisco.com with a personal email address). Best choice for a company with their own email domain but only a relatively small number of company locations being used for access management.
No	Yes	Note that this option may cause the Delegated Administrator's company to appear in search results with other companies that also allow users to submit association requests solely by company address matching. Best choice for a company that does not have its own email domain, but wants to allow users to search by company by name and address.
No	No	This combination restricts self-registration requests to only those users who know the company passcode. Best choice for a company that does not have its own email domain, but does not want the company to appear when users search by address.

Association Approval Options

A Delegated Administrator may prefer to explicitly review and approve all association requests by selecting the *Manual approval required for all requests* option. Or, they can potentially reduce their workload by allowing the Cisco Services Access Management application to automatically approve requests, depending on the information provided by the requester during the self-association process. There are two options for automatically approving association requests:

- If the requester's email address matches the company's email domain and the requester provides the company passcode
- If the requester provides the company passcode

After making the selections on the "Step #2: Company Association Settings" page, click **Next**.

The next step in establishing company settings is to define the company passcode and email domain.

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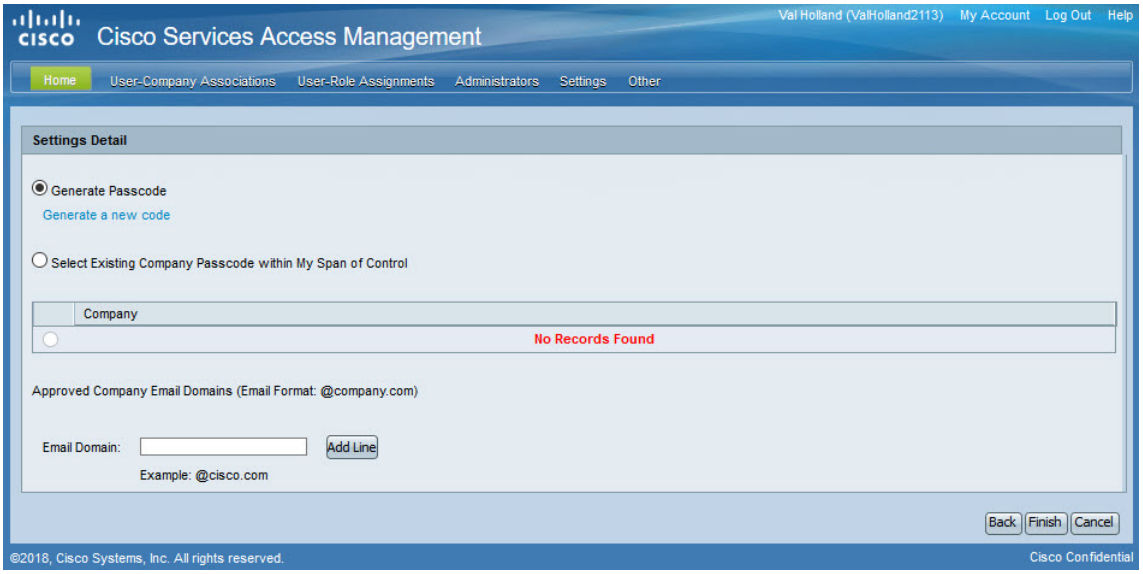

The following options are available to establish a company passcode:

- Generate Passcode
  Select this option to generate a new passcode for the company location, and then clicking the **Generate a new code** link. The system displays the passcode on the page.
- Select Existing Company Passcode within My span of Control
  Select this option when setting up company association rules for additional company locations.

To leverage email domain matching, allowing users to easily request association to the company, enter one or more valid email domains, in the format ***@domainname.com***. Only enter email domains that are uniquely registered to the Delegated Administrator's company. To enter additional email domains, click the Add Line button beside the Email Domain field.

Click **Finish** to save these settings for the company location. A confirmation message is displayed, along with the details of the association rules set up for the company.

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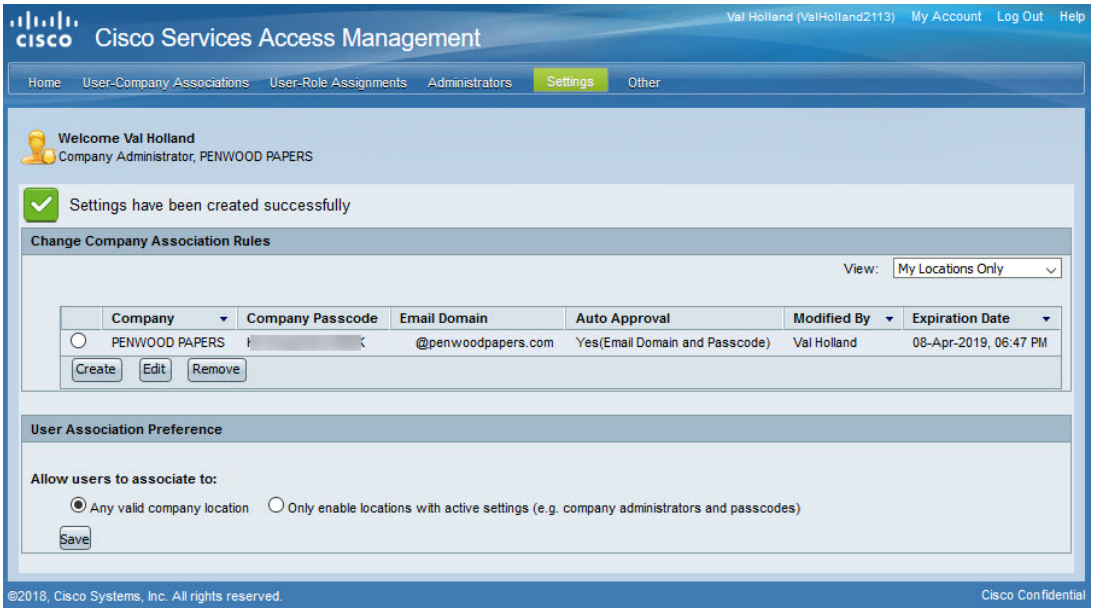

The default expiration date for the company passcode is six (6) months. The Delegated Administrator will receive a notification when the company passcode should be revalidated or changed.

The final step is to determine how users are able to associate to the company. Options are:

- Any valid company location
- Only enable locations with active settings (e.g. company administrators and passcodes)

After selecting the option that is appropriate for the company, the Delegated Administrator clicks **Save**. The system displays the following message at the top of the page: “User association preference settings have been saved successfully”.

Set Up Notification Preferences

Each Delegated Administrator within the Cisco Services Access Management application should establish their notifications settings to:

- Determine visibility of their contact information to users requesting association (or already associated to) the company.
    - If contact information is available, users can follow up on pending requests, or contact their Delegated Administrator regarding access issues.
    - If contact information is not visible, users can send an email to the Delegated Administrator through a blind submission function.
- Determine whether or not to receive email notifications and alerts, and if so then determine the frequency of the notifications and alerts. This applies to pending requests as well as notification of approval of requests for any user activity by any Delegated Administrator in the company.

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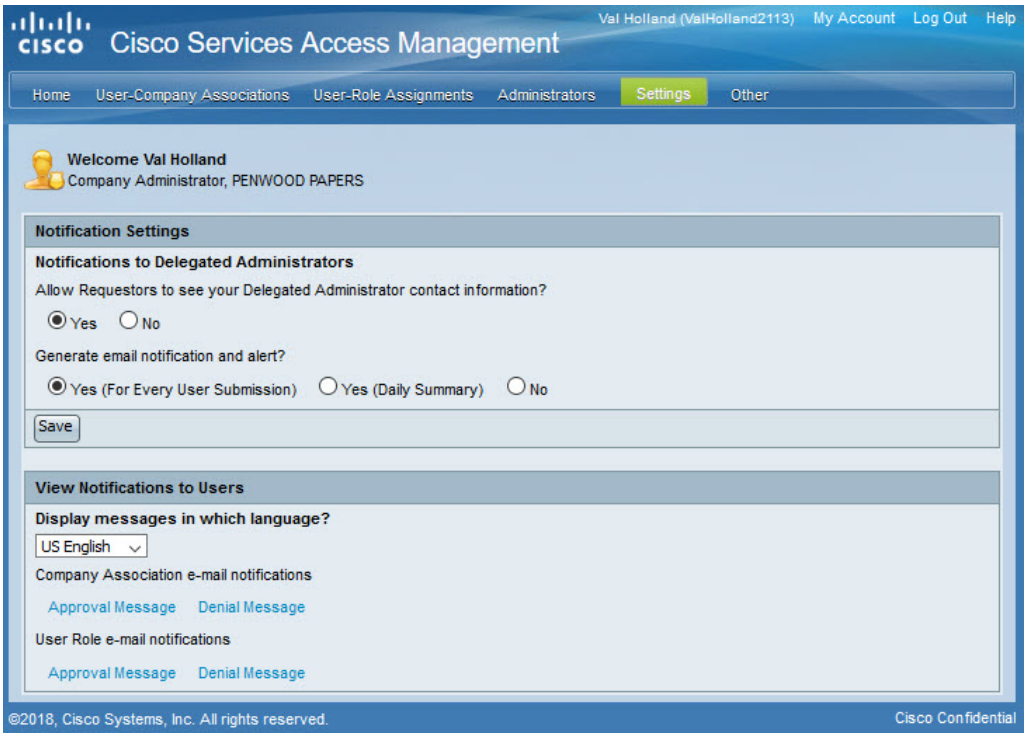
NOTE: Cisco recommends that each Delegated Administrator initially select "Yes (For Every User Submission)" so that the Delegated Administrator is notified for every user request made or approved. This can change over time based on need.

To set notification preferences, navigate to "Settings → Change Notification Preferences".



View Notifications to Users

At the bottom of the page, the Delegated Administrator can view the contents of the email notifications sent to users who request company association or a user role. Simply select in which language the email notification will be displayed and then click any of the Approval Message or Denial Message links. The system displays the contents of each type of email selected.

After making the appropriate selections for notifications to Delegated Administrators, click "Save" to complete the notification setup.

The system displays the following confirmation message at the top of the page: "Notification settings have been saved successfully".

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User-Company Association and Management

There are multiple ways users can be associated with the Delegated Administrator's company.

- Self-association request and approval
- Company association of a single user or multiple users by company administrators

Over time, company administrators can change or delete user company associations based on business need or when users leave the company.

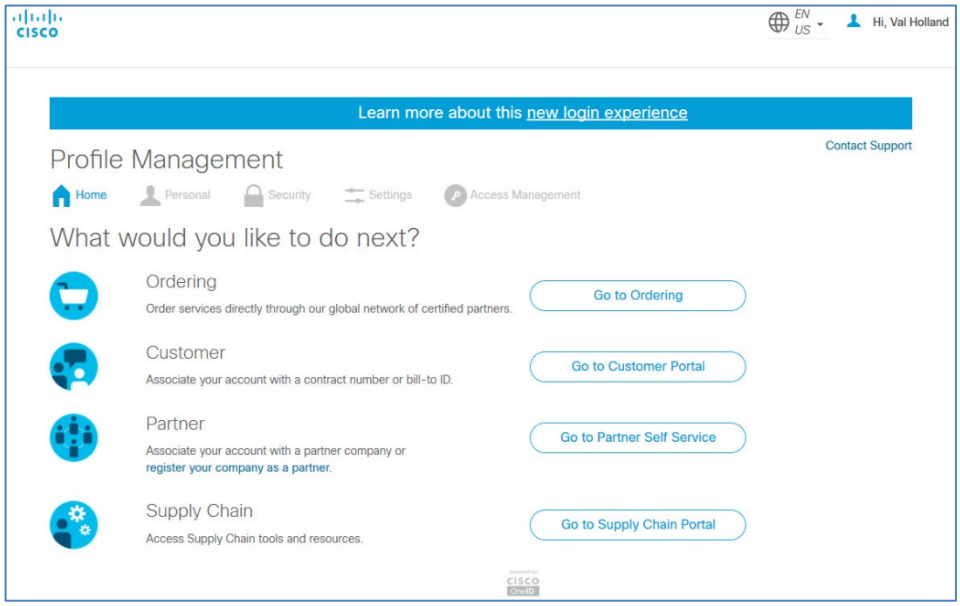
User Company Self-Association

A user can request to be associated to their company via the Profile Manager application on the Cisco.com site. The request is sent to the company Delegated Administrator based on the information provided, and the association criteria established for the company.

For example, if the Delegated Administrator for the company requires a passcode, then the user must provide the company passcode. Alternatively, the Delegated Administrator may have allowed users to search for the company location by address. If searching by address, users can select the company location from a list.

NOTE: For a user to request self-association to their company via Profile Manager, the user must first have registered as a Cisco customer or partner. This occurs when the user first attempts to create a Cisco.com account.

To request association to their company, the USER must log in to Cisco.com and access Profile Management.



After logging in to the Cisco.com Profile Manager application, the user selects the **Access Management** option at the top of the page, and then clicks the **Smart Services** link.

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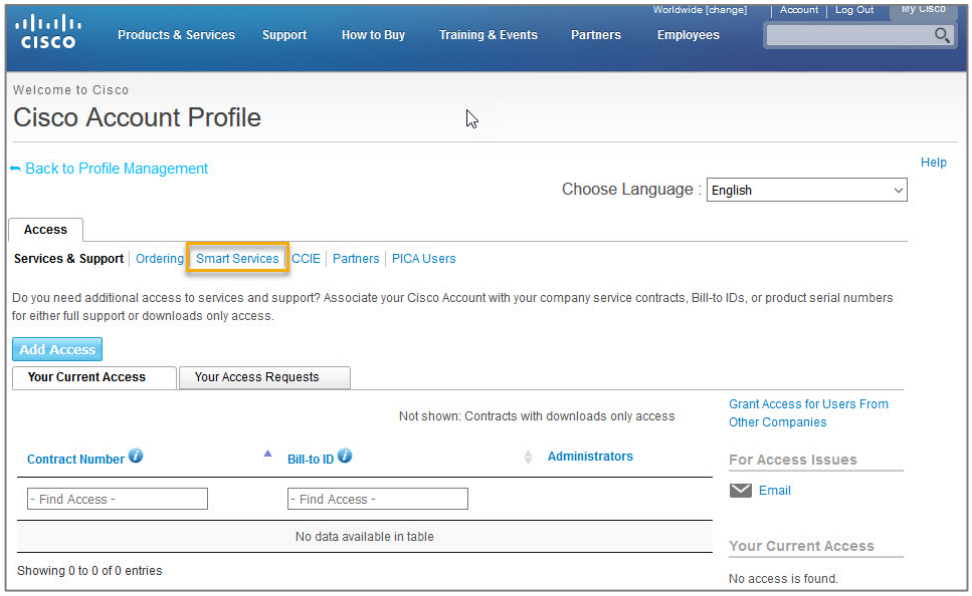
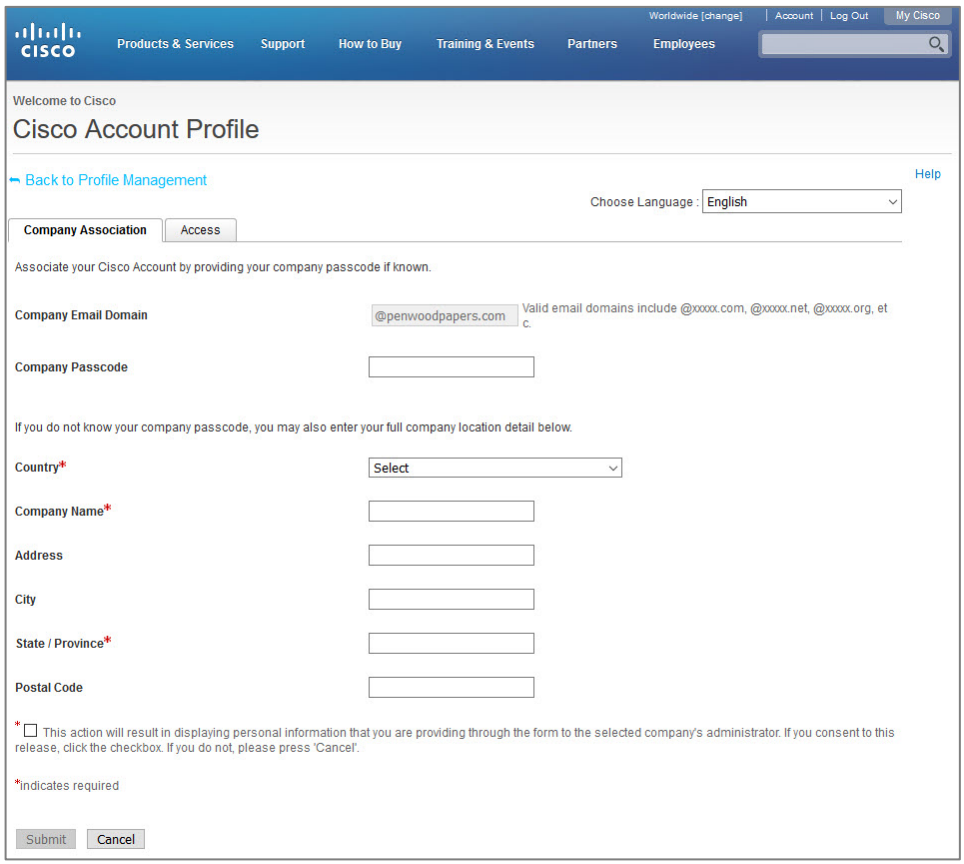


The system displays the user's Cisco Account Profile page.



NOTE: By default, the system propagates the value in the Company Email Domain field based on the user's login to Cisco.com.

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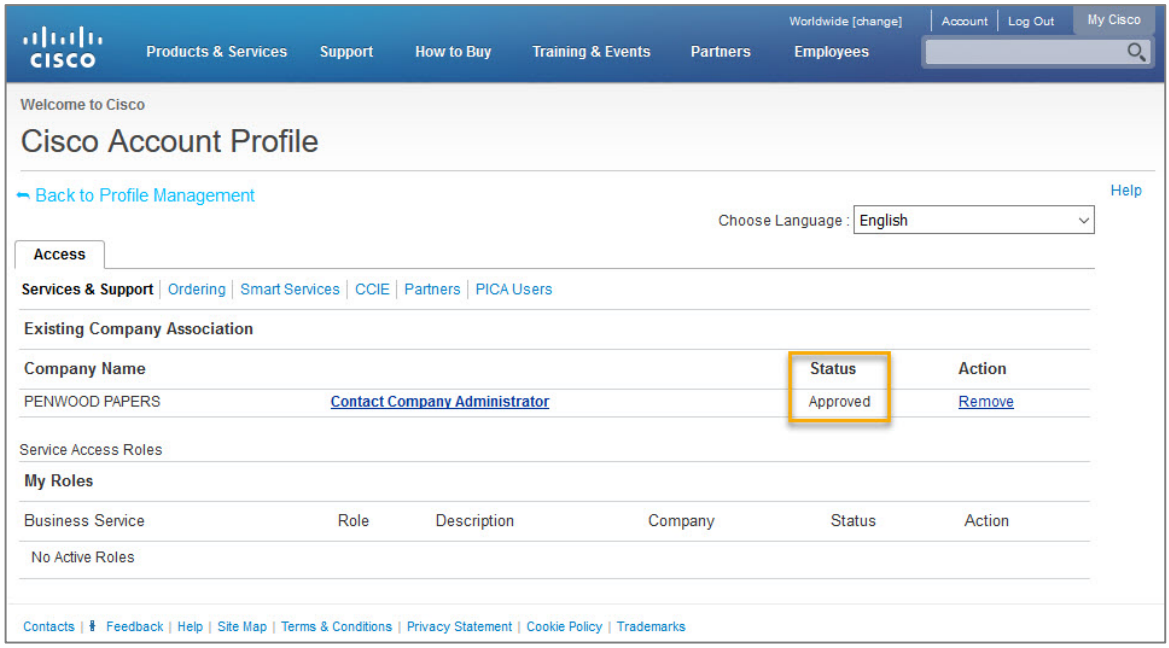
To be associated to the company, the user has the option to fill in only the company passcode, if known. Otherwise the user fills in all required fields, and any optional information desired.

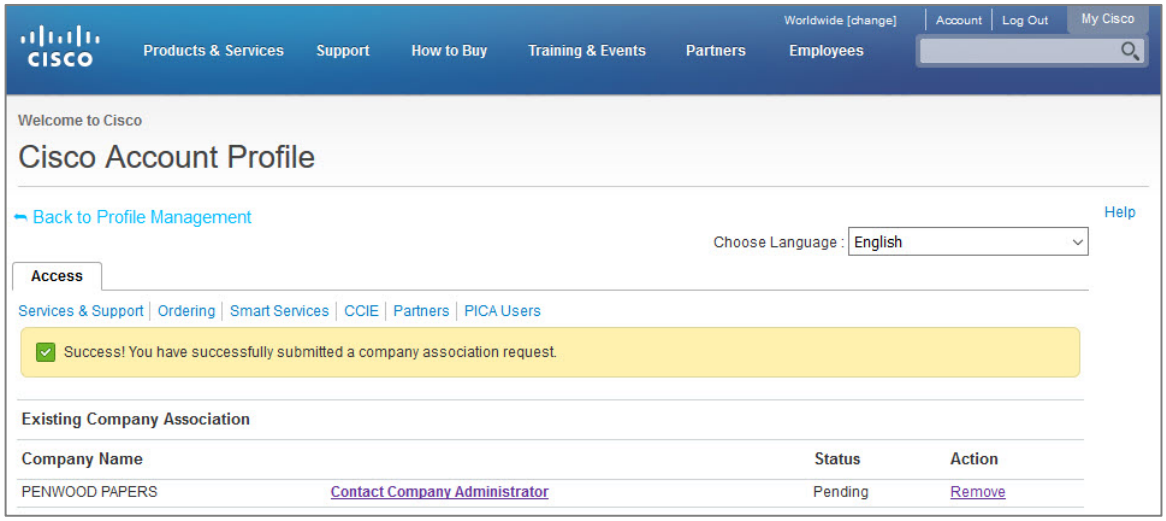
The user then selects the checkbox for accepting the Terms & Conditions to confirm sharing their profile information, and then clicks **Submit**.

This ensures that the user's profile information is displayed in Cisco Services Access Management, allowing company administrators to identify who is requesting access.

If the user submitted the request using the company passcode, the system automatically approves the request and displays the "Approved" status on the Existing Company Association page.



If the user entered company name, address, and so on, the system displays a "Pending" status.



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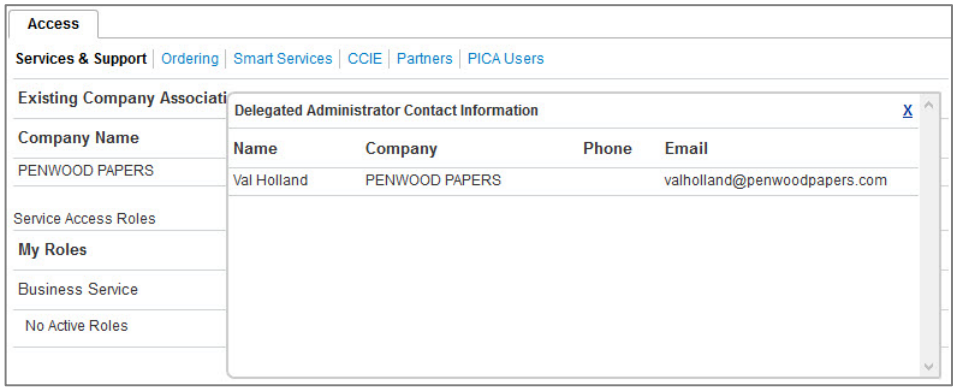
Notifications are sent to the company Delegated Administrator(s) informing them when a user has requested association to their company.

- Auto-approved — If the Delegated Administrator configured auto approval for all requests, and the request met the criteria established by the Delegated Administrator for company association settings, the email shows the user's request to associate their Cisco online account to the company was approved
- Not auto-approved — If the Delegated Administrator did not configure auto approval for requests, the email shows the pending request(s). The Delegated Administrator logs in to Cisco Services Access Management and either accepts or denies the association requests.

The user can return to their Cisco.com Account Profile to view the status of their company association request.

The status changes to Approved when a company Delegated Administrator approves the user's request. Otherwise, the request remains in Pending state.

The user can follow up on their requests by clicking the Contact Company Administrator link. The company's Delegated Administrator(s) contact information displays only if the Delegated Administrator opted to show their details while setting their Notification Preferences. Otherwise, a blind email will be sent.



Once the request for company association is approved or denied by the Delegated Administrator of the company, the user will be notified via email about the change to their Cisco Account. The sample below shows the email sent to the user notifying them of the approval.

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Dear Don:

Your request to be associated with the following location has been approved:

PENWOOD PAPERS
US

You may now go to the Cisco Profile Manager and request roles to upgrade access to your Cisco Account via the Additional Access tab.

If you have any questions about this change to your Cisco Account, please contact the Cisco Services Access Management Helpdesk below for further assistance:

service_access_management_support@cisco.com

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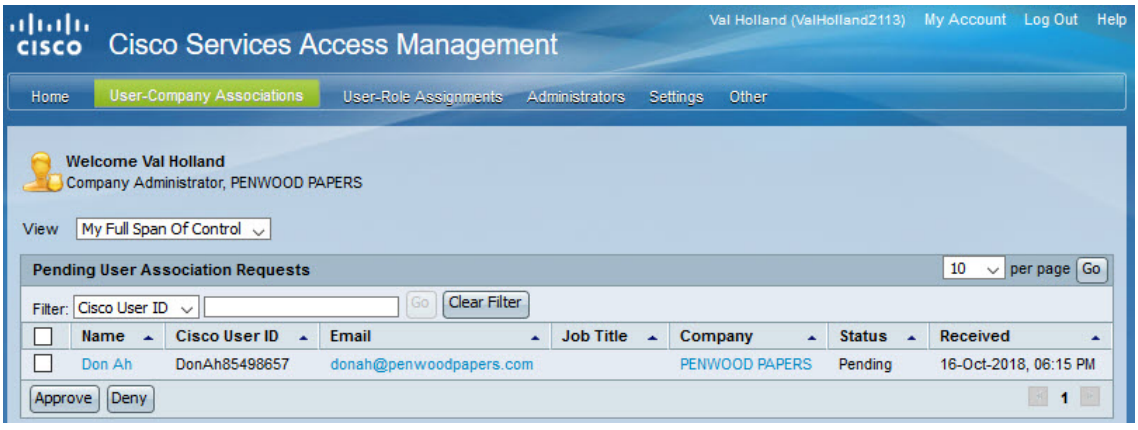
Manage User Requests for Company Association

Delegated Administrators are responsible for approving or denying pending user requests for company association. This manual approval/denial process is required if the Delegated Administrator opted out of automatically approving association requests when setting up their company association rules.

To manage user requests, the Delegated Administrator logs in to the Cisco Services Access Management application and navigates to "User-Company Associations → Pending User Association Requests".

A list of pending requests is displayed.



Select the record(s) to be managed and then click "Approve" or "Deny". For the purposes of this document, the Delegated Administrator will approved the user-to-company association.

The system displays a pop-up to confirm the selection. Click "Yes" to confirm the decision.

A confirmation pop-up shows a list of users that were approved or denied association to company.

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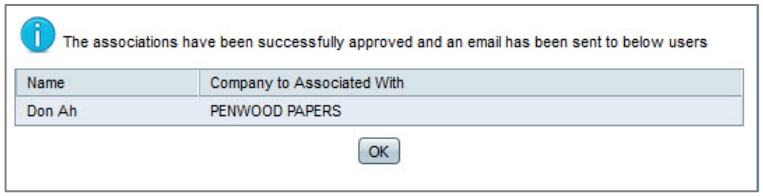


Click "OK" to return to the Pending User Association page. The system displays a list of remaining user requests pending approval, if any. Otherwise, the systems displays the message, "There are no requests pending your action at this time".

User Company Association using Cisco Services Access Management

The above section describes the user self-association request and approval process. As an alternative, a Delegated Administrator can directly associate users to their company, either individually or through a batch upload.

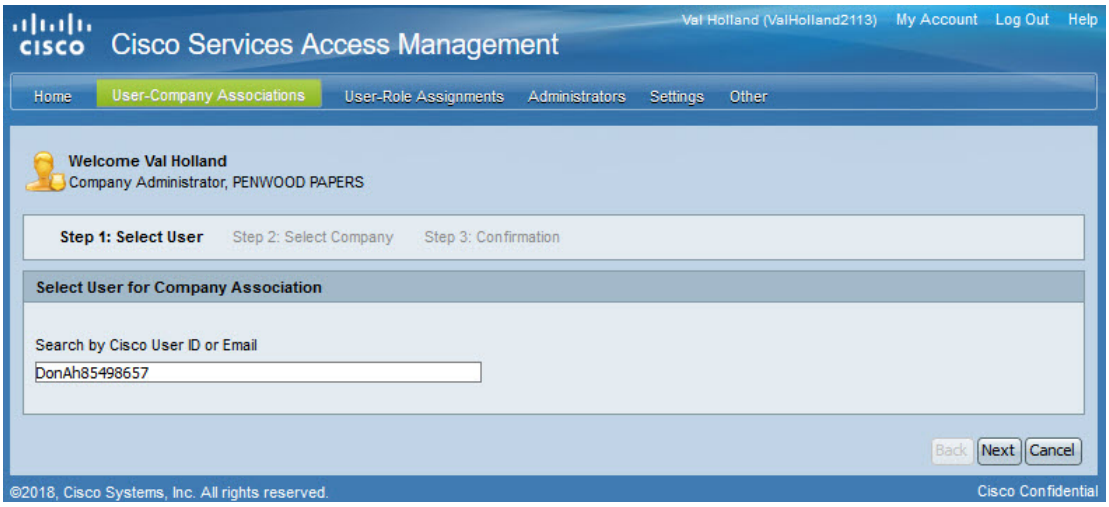
User-to-company associations can be managed by one or more company administrators, for a given company location or multiple company locations. Refer to the Nomination of Additional Delegated Administrators section to learn more about creating and managing access for multiple Delegated Administrators.

Single User-Company Association

To associate a single user to the company, navigate to "User-Company Associations → Associate User to My Company".

NOTE: Refer to the Perform User-Company Association via Batch Upload section to associate multiple users.

From the Select User page, enter the CCO ID or email address of the user to be associated to the company, and then click "Next".



NOTE: If the user entered is already associated to the company, the system displays a "User is already associated to your company location" banner at the top of the page.

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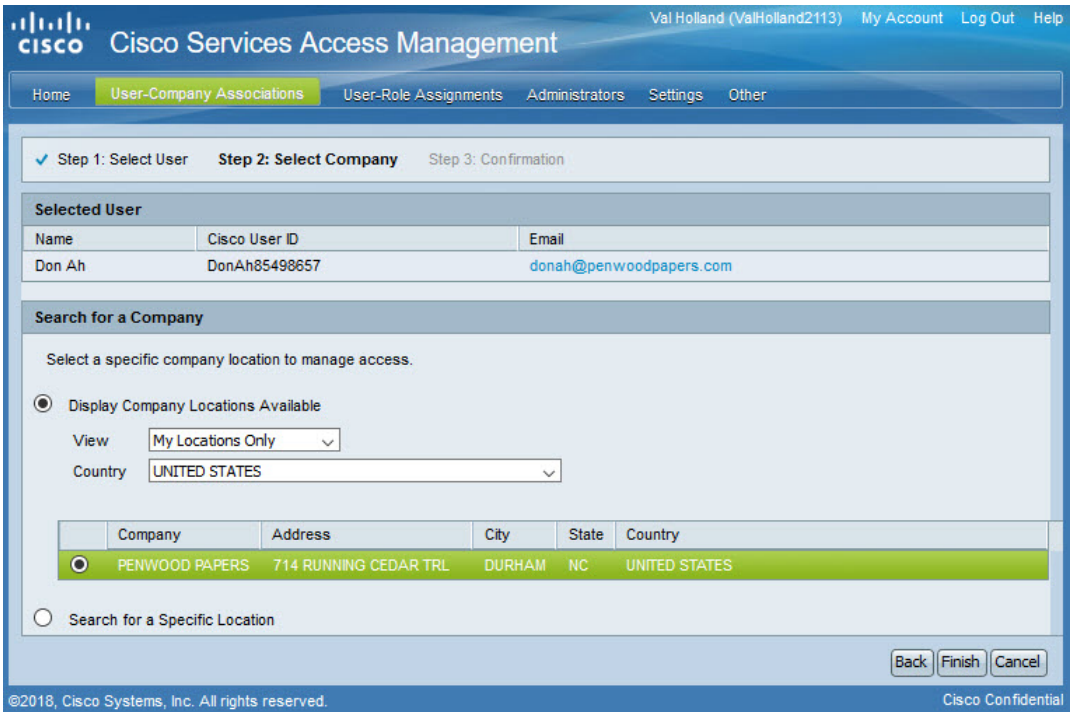
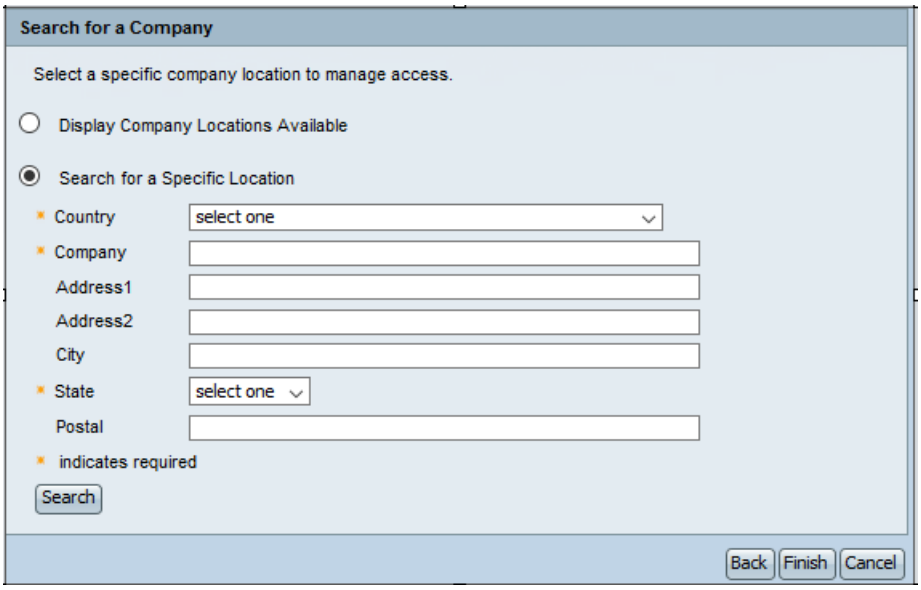
From the Select Company page, the Delegated Administrator can either select the company location from the list of existing locations or search for a specific location. The system defaults to Display Company Locations Available.



If the Delegated Administrator opts to search for a specific location, the system requires information in certain fields.



For either of the above scenarios, after making the selection click “Finish”.

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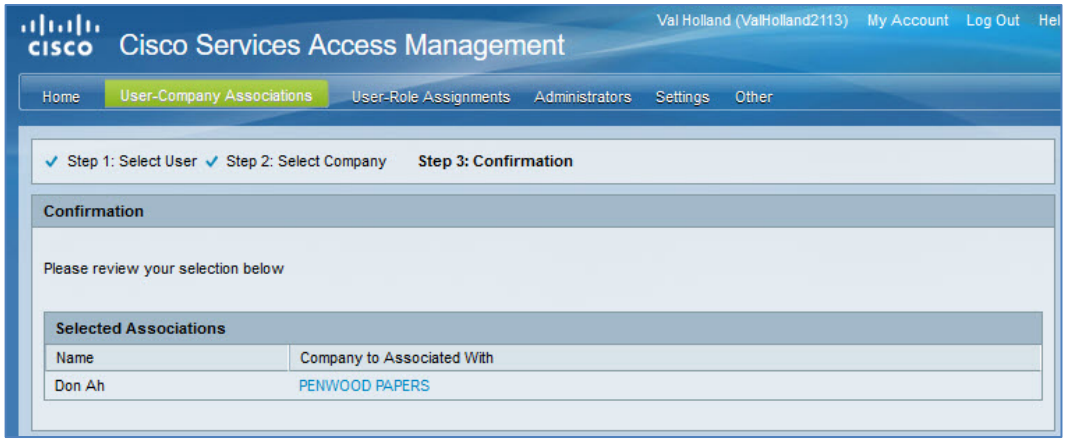
From the Confirmation page, verify the details of the user and the company name selected. If correct, click "Finish." Otherwise, click the "Back" button to modify the information entered.



The system displays an Association Complete pop-up window. Click "Yes" to immediately assign access roles to the newly-associated user. Click "No" to assign roles to the user at a later time.

Perform User-Company Association via Batch Upload

The Delegated Administrator has the option to associate multiple users through a batch upload, using the CSV template provided. This feature may be especially useful to onboard or migrate users from another system or user repository.

To associate multiple users using the batch upload feature, navigate to "User-Company Associations → Batch Upload".

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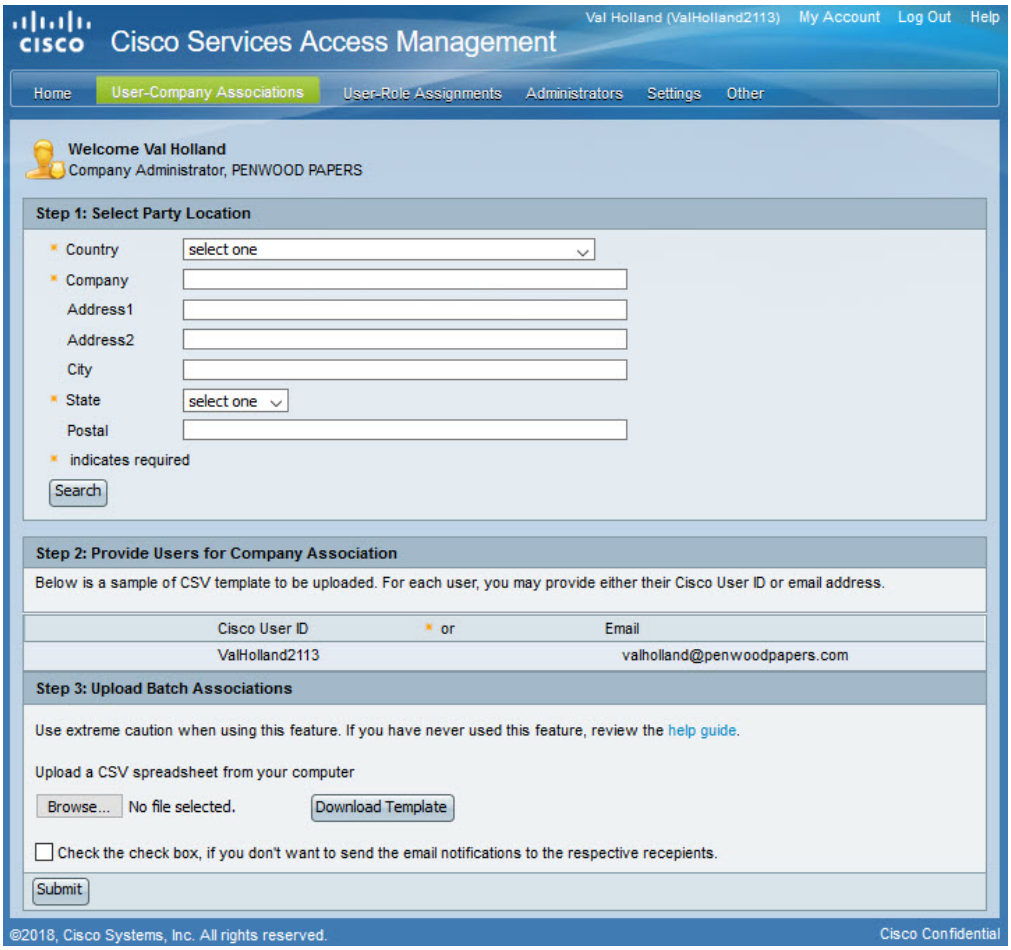

In the Select Party Location panel (party = company), enter the required details to search for the company location to which the list of users will be associated, and then click “Search”. From the displayed list, click the radio button next to the company that best matches the company name and address.

NOTE: The information entered in the Company field must be an exact match to the company name. A partial name is not recognized. For example, enter the company name as Penwood Papers, rather than simply Penwood.

If the company location is not found, the system displays a “Company address record not found” message instead.

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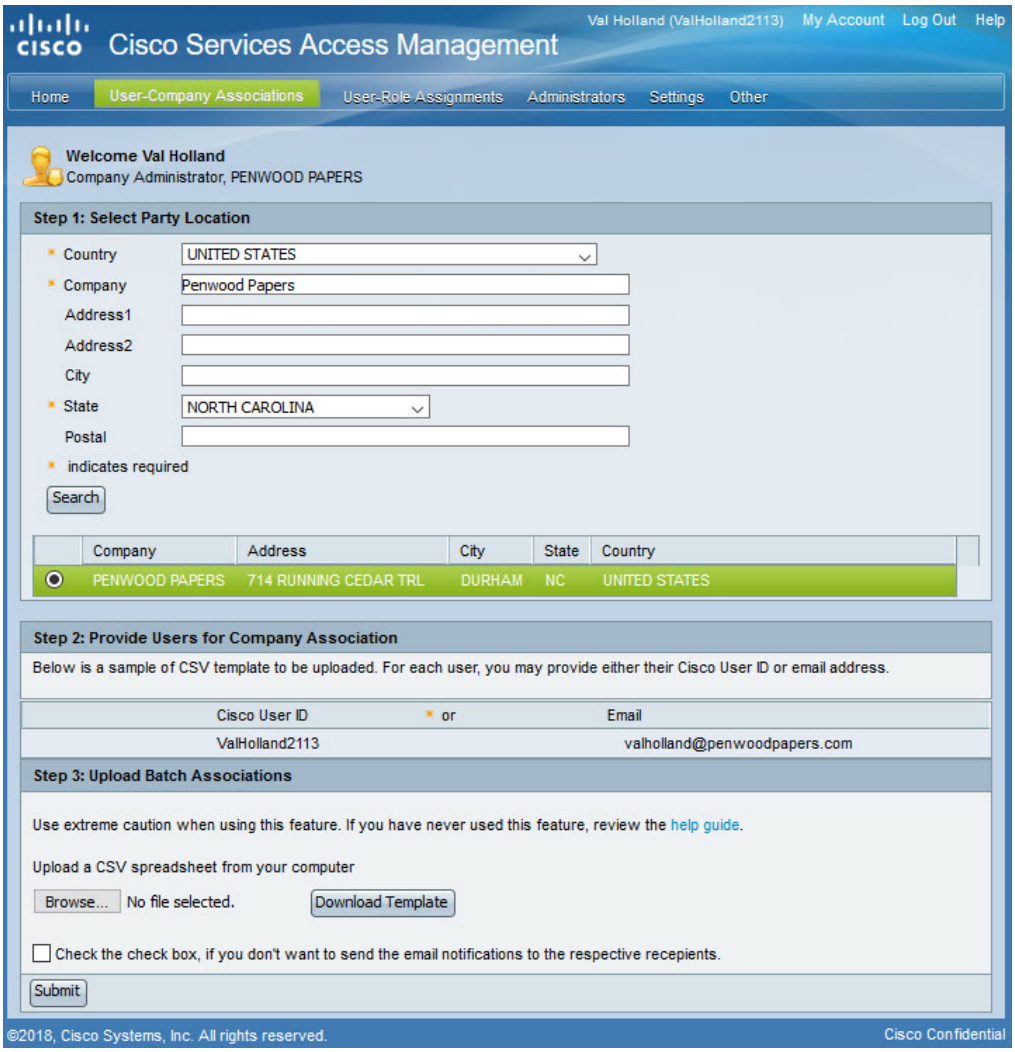
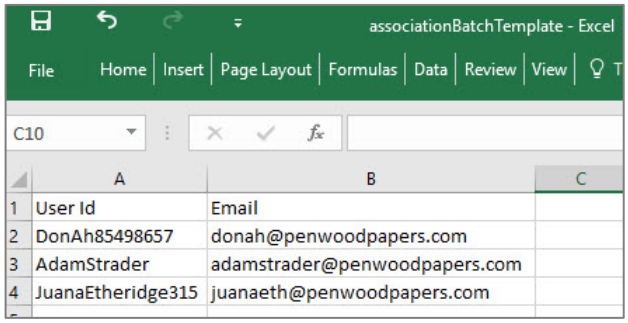


To begin the batch upload process, download the template and save .the file as "associationBatchTemplate.csv", retaining the original filename. Any change to the file type, format, or column headers will result in an error during the user-company association upload.

The file can be re-used for subsequent multiple user associations by updating the details of users in the file.

Open the saved file and enter user details as required.



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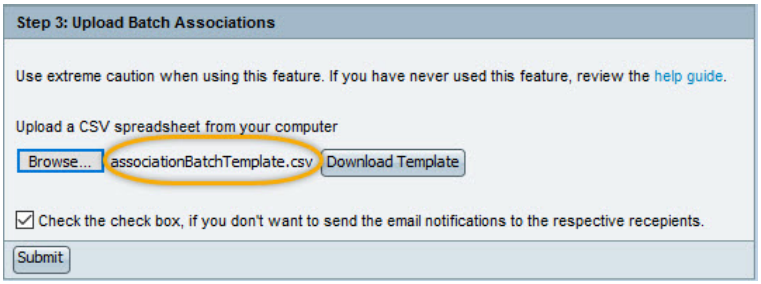
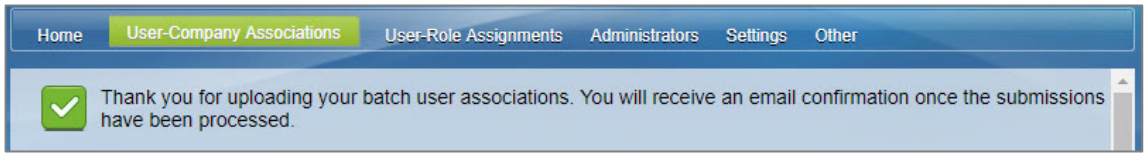
Upload the locally saved file with the required user details, by clicking “Browse”. The system displays a truncated version of the filename, as shown below.



The checkbox at the bottom of the page designates whether the users being associated will receive email notifications. To send notifications leave the checkbox blank. Otherwise, check the checkbox to suppress email notifications. Click “Submit”.

A confirmation message is displayed.



If there was an error in associating users, the list of users that were not associated will be displayed along with the error message and reason.

The Delegated Administrator receives an email when the batch job is completed. The batch job synch-up job runs every 15 minutes.

Users associated successfully to the company are notified via email that their Cisco Account has been associated to the company, unless the Delegated Administrator checked the box for the system to suppress the email notifications to the users.

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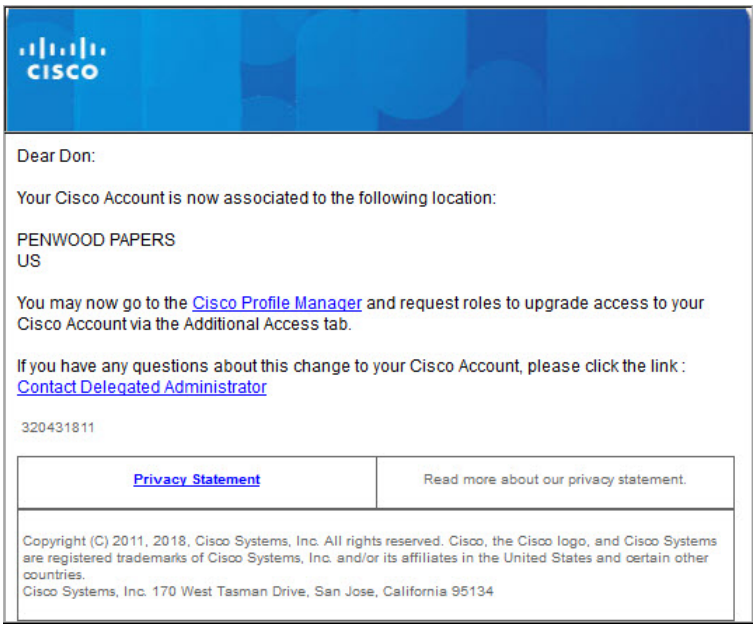

Dear Don:

Your Cisco Account is now associated to the following location:

PENWOOD PAPERS
US

You may now go to the Cisco Profile Manager and request roles to upgrade access to your Cisco Account via the Additional Access tab.

If you have any questions about this change to your Cisco Account, please click the link : Contact Delegated Administrator

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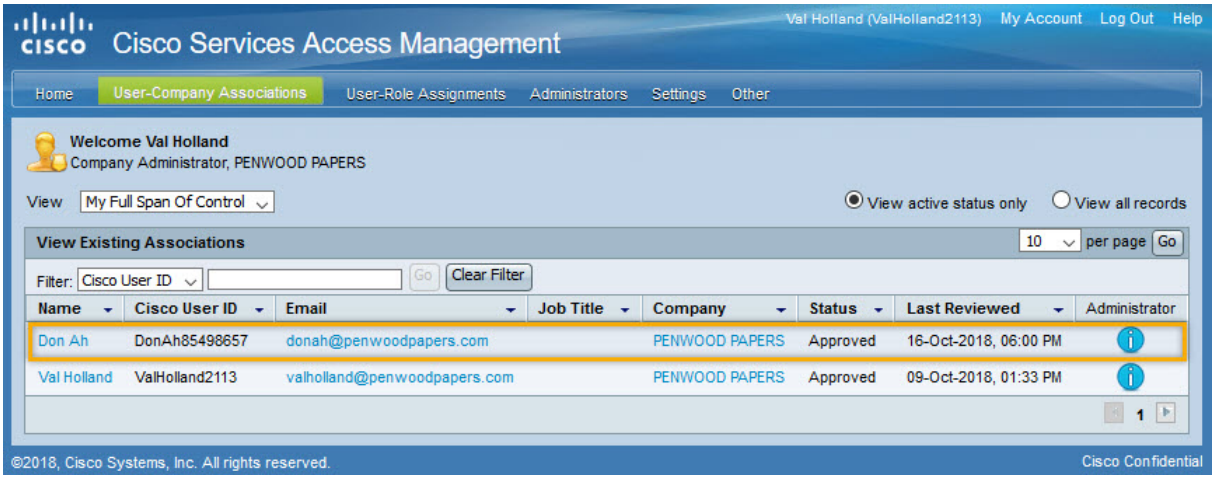
The Delegated Administrator can view the successfully uploaded users from “User-Company Associations → View Existing Users”.



Revalidate User Association Requests

Revalidation of user associations may be necessary due to organizational changes that impact the company’s legal hierarchy within Cisco Services Access Management. Users associated with a company location affected by the organizational change will automatically be moved to a new location and the Delegated Administrator will be notified to review and revalidate those users’ access.

Other situations that may trigger revalidation of a user’s access is when a user changes their email address in Cisco Profile Manager, or if a company merges with another company.

To take action on pending revalidation requests, go to “User-Company Associations → Revalidate User Associations”.

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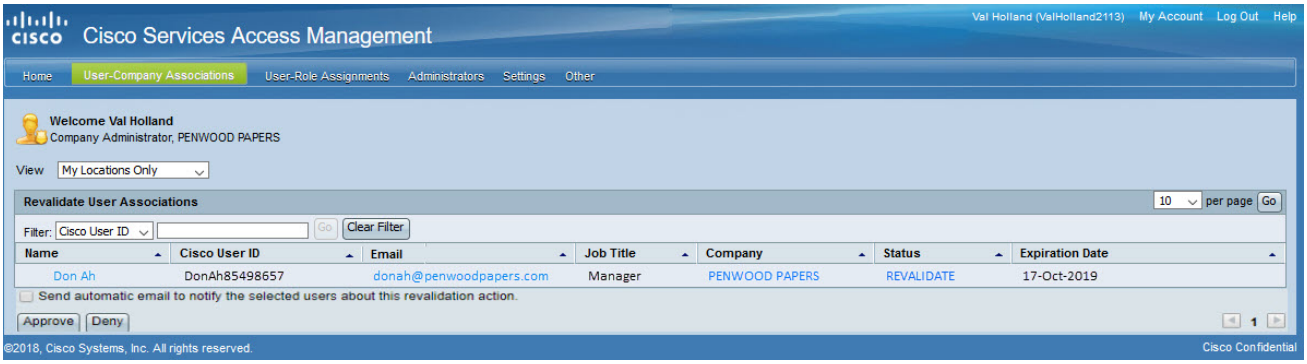
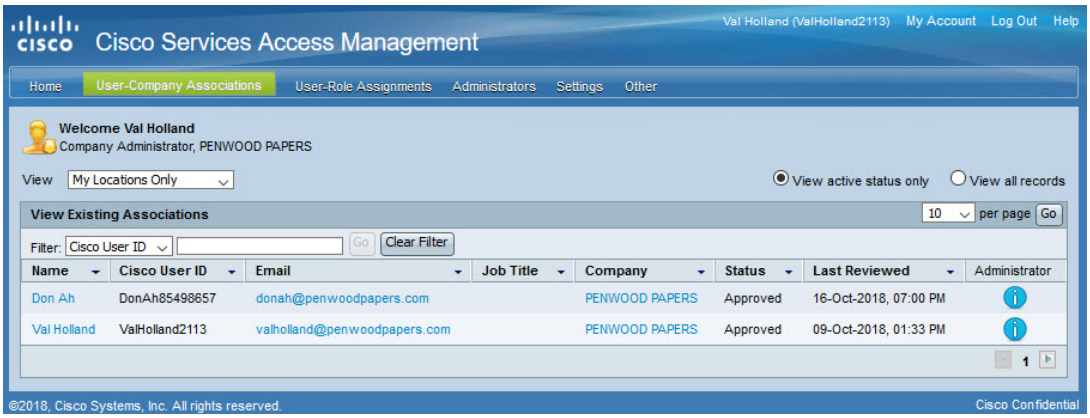
The system displays a list of pending requests. Click the checkbox beside the user(s) to be revalidated and then click “Approve” or “Deny”.



If requests are not pending, the system displays the “There are no requests requiring your action at this time” message.

View Existing Users Associated with the Company

Delegated Administrators can view existing users associated with the company by clicking the “User-Company Association” tab, and then selecting “View Existing Associations”. The system displays a list of all users associated with the company.



The default view is for active users only. Click the “View all records” radio button to see the list of all active and inactive users associated with the company. The default view is also for “My Locations Only”. To see all users within the entire organization including company headquarters, from the View field select the “My Full Span Of Control” option.

Change Existing User-Company Associations

A Delegated Administrator can change an existing user’s company association. This may be required if a user leaves the company, changes locations, or no longer requires the previously provided access.

Go to “User-Company Associations → Change a User’s Company Association”. The system displays a list of all active users associated with the company. Click the radio button beside the name of the user to edit, and then click either “Edit” or “Remove Association”.

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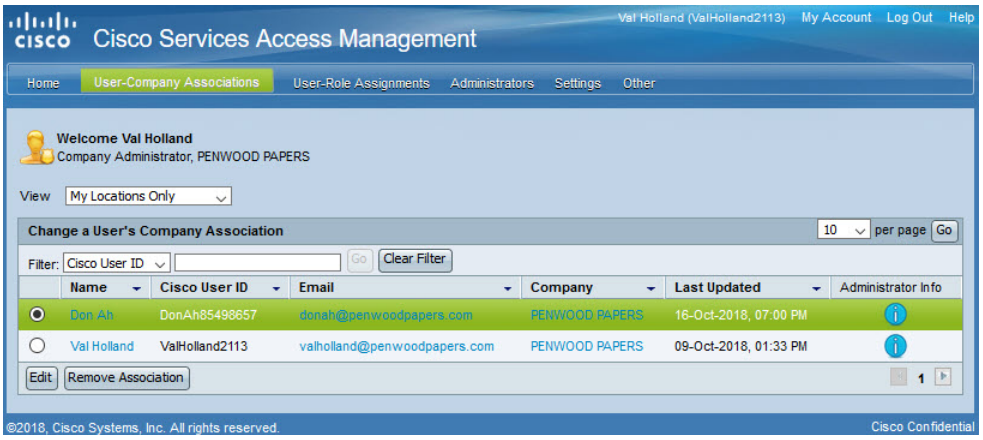
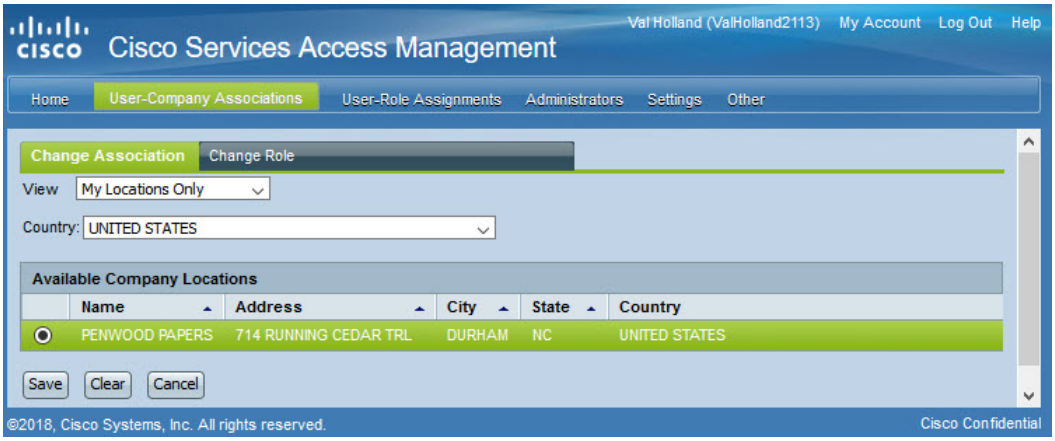


If the company has many users, the Filter option can assist with quickly locating one user based on Cisco User ID, first name, or last name. Another option is to click the header of a column to sort alphabetically.

Edit User Company Association

To change the selected user's company association, click "Edit".



By default, the company location with which this user is associated will be selected. To select a different location within the company's organization, select "My Full Span of Control" to view all available company locations, and then select the desired location.

Remove a User-Company Association

Alternatively, to disassociate a user from the company, select "Remove Association" from the first screen.

The system displays a pop-up to confirm the decision to remove selected user's association to the company. Click "Yes" to confirm remove the users' association to the-company. Click "No" to cancel the action

Disassociating a user from the company also results in the deletion of all roles assigned to that user.

A confirmation message is displayed and the user is notified via email about the changes to his/her Cisco Account. Delegated Administrators of the company also receive email notifications about changes made to the user's company association, based on their notification settings.

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User Role Assignment and Management

To define the access level for a user to a protected Cisco Service, at least one role must be assigned to each user associated to the company, including Delegated Administrators. A role should also be assigned to external users not associated to the company, but has access to the company's information.

Roles can be assigned as follows:

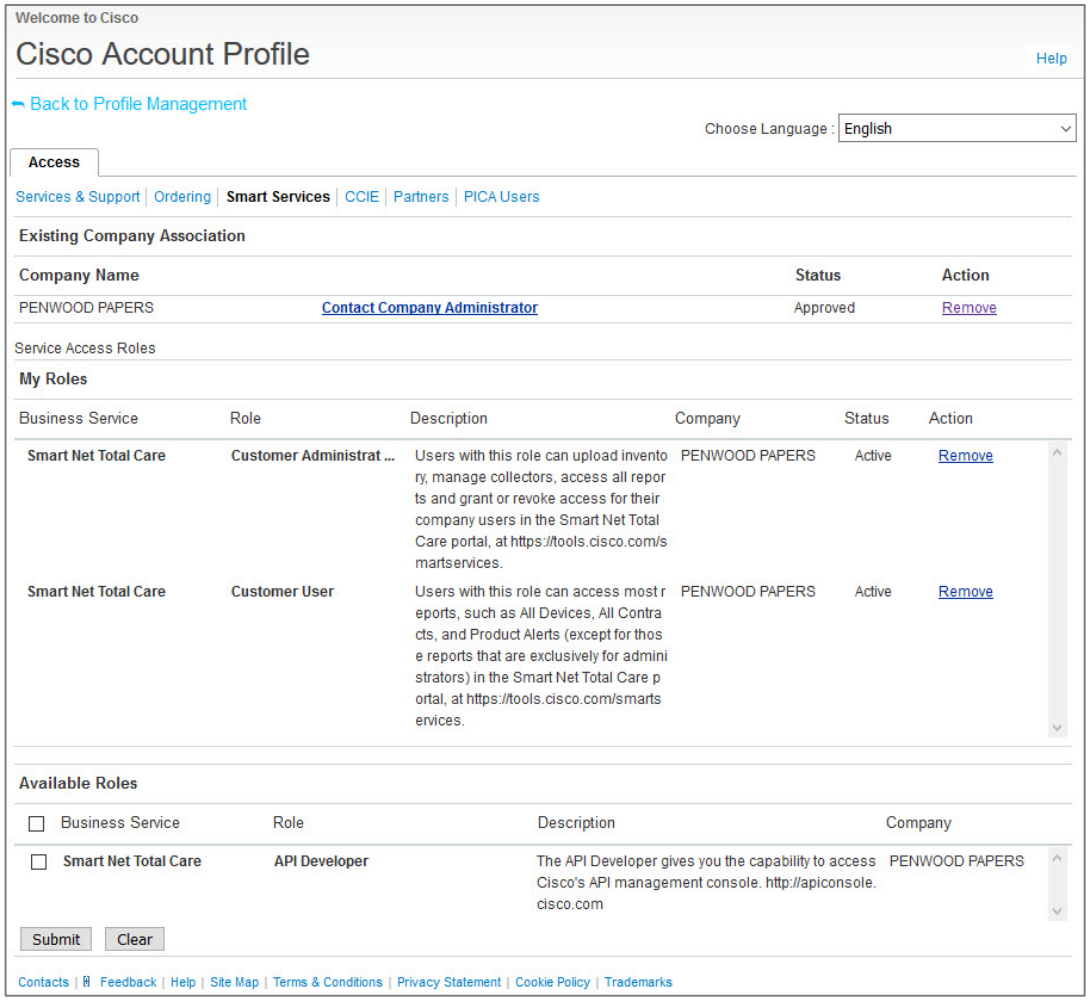
- Company administrator assigns roles to associated users or to external users
- Users request additional access to Cisco Services via Profile Manager

NOTE: Some Cisco Business offers are required to assign roles to the end customer. See Appendix D for details.

User Role Access Request using Profile Manager

Only users associated to the company can request additional roles via Profile Manager.

A user can view their current role assignments by clicking the Smart Services link under the Access Management tab in Cisco.com Profile Manager.



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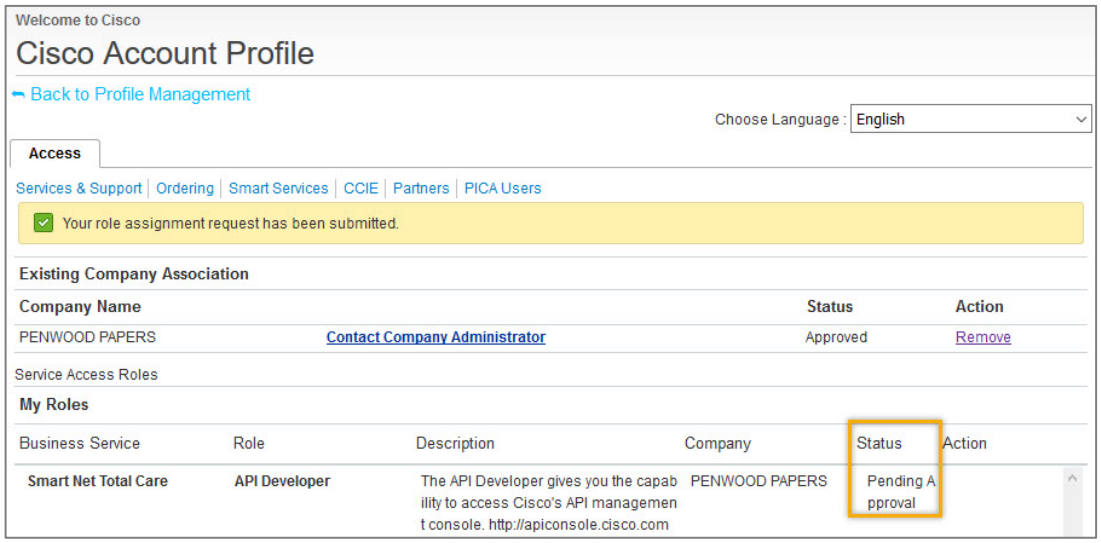
Existing roles, if any, are displayed in the My Roles section.

To request a role assignment from the Available Roles section, the user clicks one of the checkboxes associated with the desired role and then clicks Submit.

Upon successful submission, a confirmation message is displayed in a banner at the top of the page, and the status shows the role is pending.

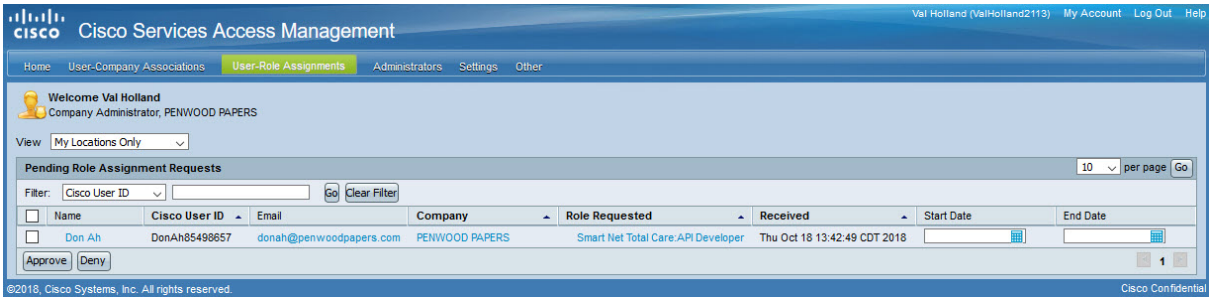


The Delegated Administrator(s) of the user's company are notified via email about the user's request for additional role access, based on the Delegated Administrator's notification settings.

Manage User Role Assignment Requests

User requests for access to Cisco Services are approved or denied by the company Delegated Administrator(s) using Cisco Services Access Management.

Use the top menus to navigate to "User-Role Assignments →Pending Role Assignment Requests" to view a list of pending user requests for role assignment.



For pending requests submitted via Cisco Profile Manager, the Delegated Administrator has the option to enter a start and end date for the role for the user.

Select the requests to approve/deny from the list displayed, and then click "Approve" or "Deny".

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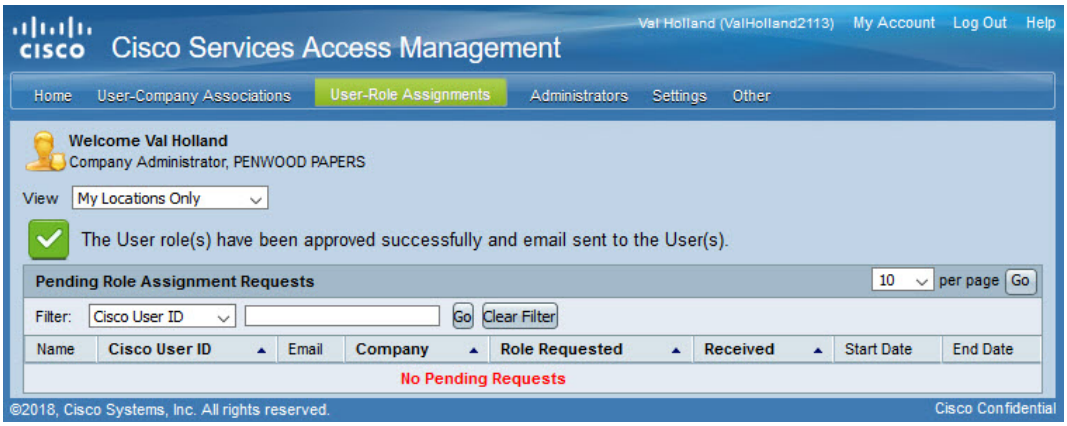

A confirmation banner is displayed on the page. Only the remaining pending requests appear in the queue, if any.

Assign User Roles using Cisco Services Access Management

To assign a role to yourself or to a user previously associated to the company, the Delegated Administrator logs in to the Cisco Services Access Management application and navigates to "User-Role Assignments → Assign Roles to Users".

Internal Roles to Users Inside the Company

From the Step 1: Select User page, the Delegated Administrator chooses the appropriate radio-button option, to either:

- Select from a list of existing users,
- search by first/last name, or
- search by Cisco User ID or Email address.

For the purposes of this document the "Search by Cisco User ID or Email" option will be used. Type the user ID or email address to be assigned a role, and click "Submit".

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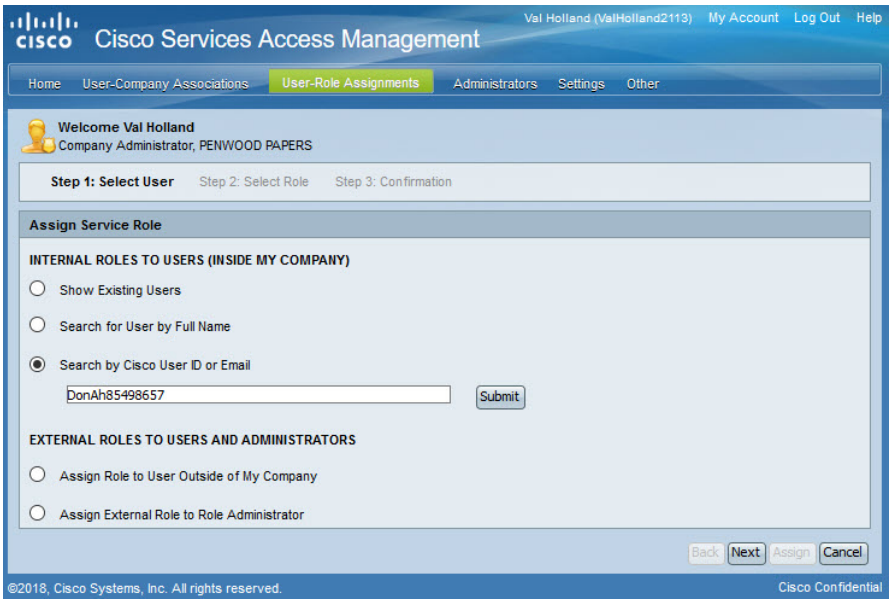
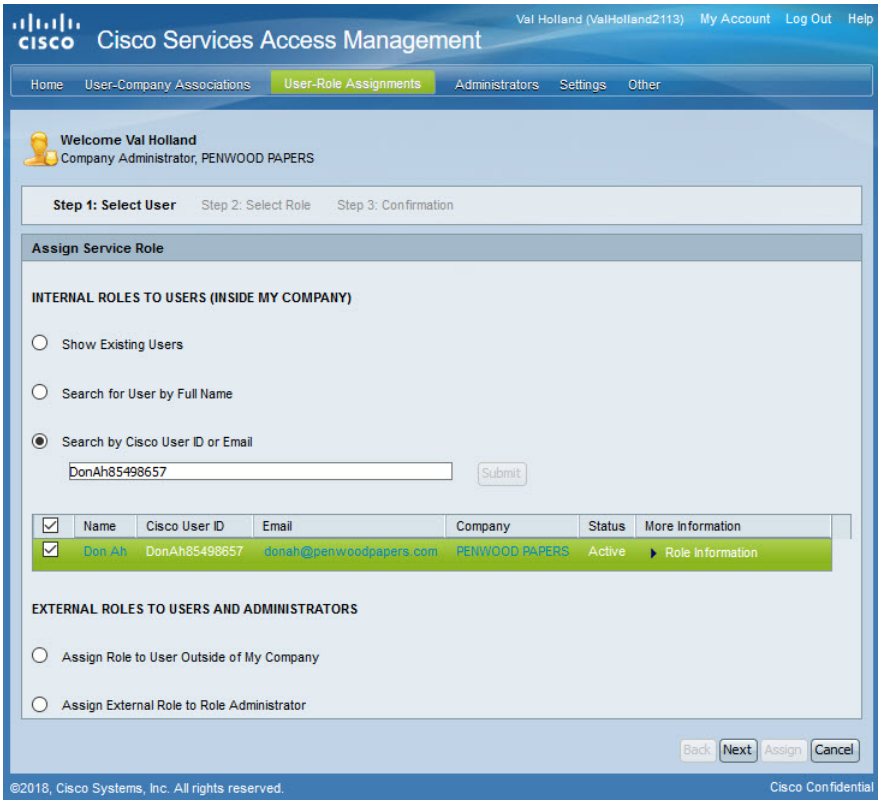


From the list of users, verify the user information and then select the appropriate user to be assigned a role. Click “Next”.



On the “Step 2: Select Role” page, click the ▶ icon next to the Cisco service offering to display the list of available roles.

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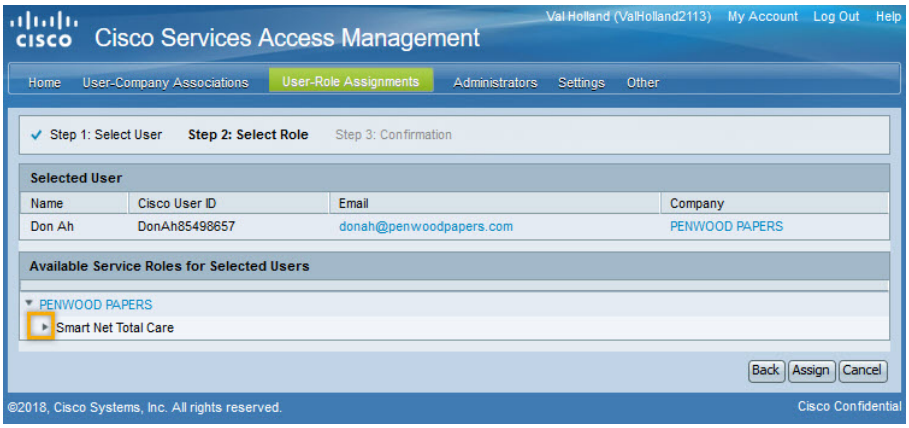
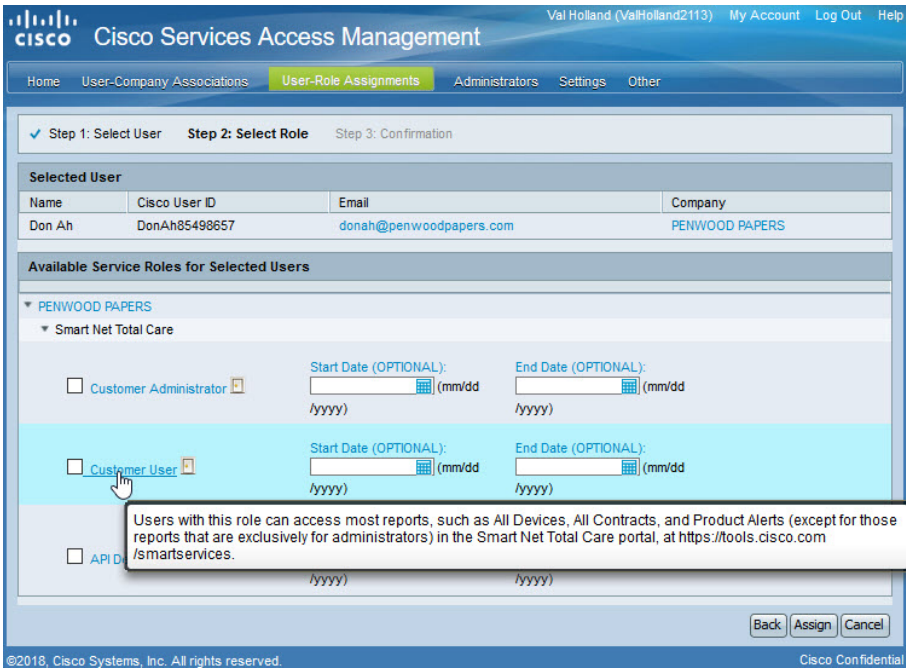


To view a detailed description of the role and its capabilities, hover over a role, as illustrated below.



NOTE: When assigning or changing a role assignment for a user, a "*" prefix to a role indicates the role is a Cisco-Branded Reseller (CBR) role, and it can only be assigned to users who have a trusted association to an external company. If the user is not eligible to have the CBR role assigned, the role will be dimmed and not selectable.

Use the checkboxes to select one or more roles to assign to the selected user. Optionally, a future Start Date and/or End Date for the role assignment can be entered. If the Start Date is left blank, the role assignment is active immediately. If the End Date is left blank, the role assignment remains active indefinitely, until the company's service offer enablement expires.

Click "Assign" to complete the transaction. A verification pop-up requests confirmation that the Delegated Administrator assigned the appropriate role and responsibilities to the user.

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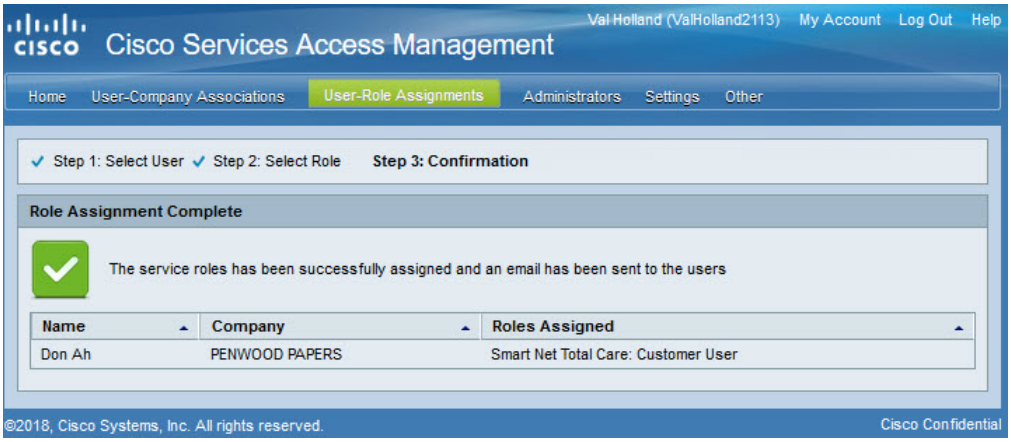
Click “Confirm” if the roles and responsibilities are appropriate for the user. A confirmation message is displayed, confirming the successful role assignment.



The user receives an email notification, informing them they have been granted the requested role assignment in the company. The Delegated Administrators also receive an email notifying them of the role assignment.

NOTE: Some Cisco Services capabilities require further qualification of the role assignment. For example, a business partner user's access may be limited to specific end customer companies.

External Roles to Users and Administrators

The Delegated Administrator can assign roles to users outside of their organization. The Delegated Administrator decides what information an external user has access to.

IMPORTANT: A Cisco Partner user should never be granted the Delegated Administrator role of an end user company. This violates the trust agreement between Cisco and the company.

From the Step 1: Select User page, the Delegated Administrator selects one of two external roles:

- Assign Role to User Outside of My Company — external users who might assist in managing the company’s devices
- Assign External Role to Role Administrator — external administrators who might assist in managing user access

To assign a role to a user outside of the company, the user’s Cisco User ID and email address are required.

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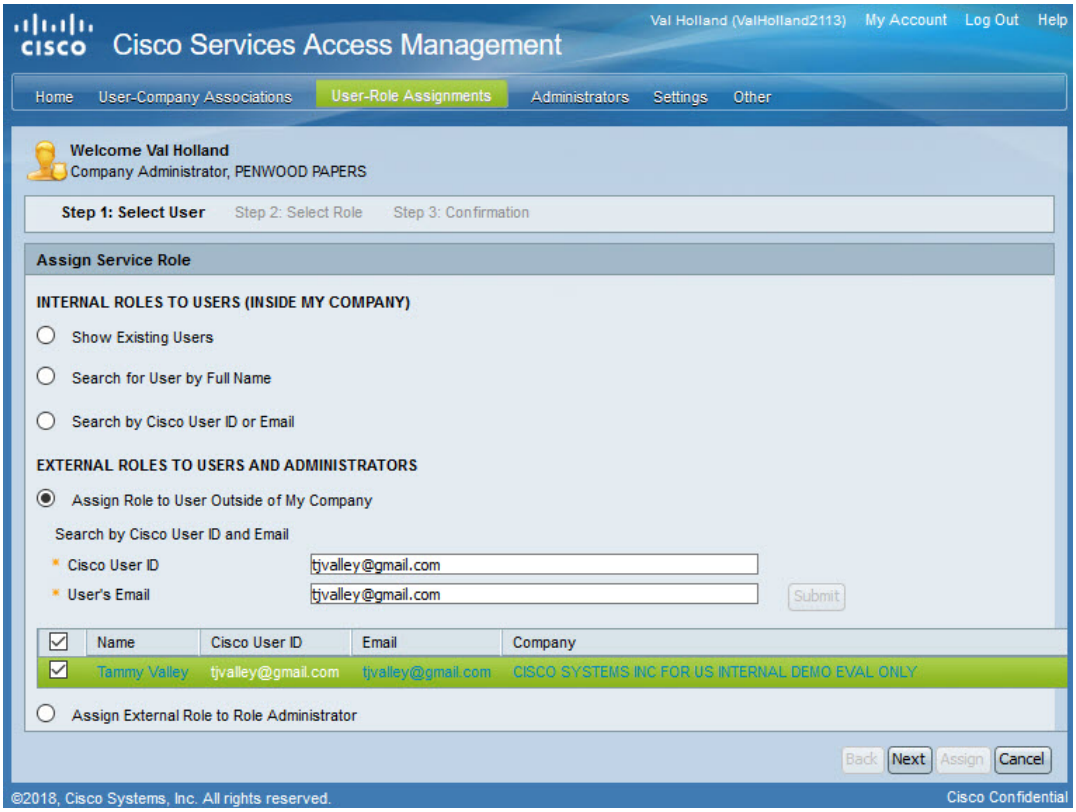
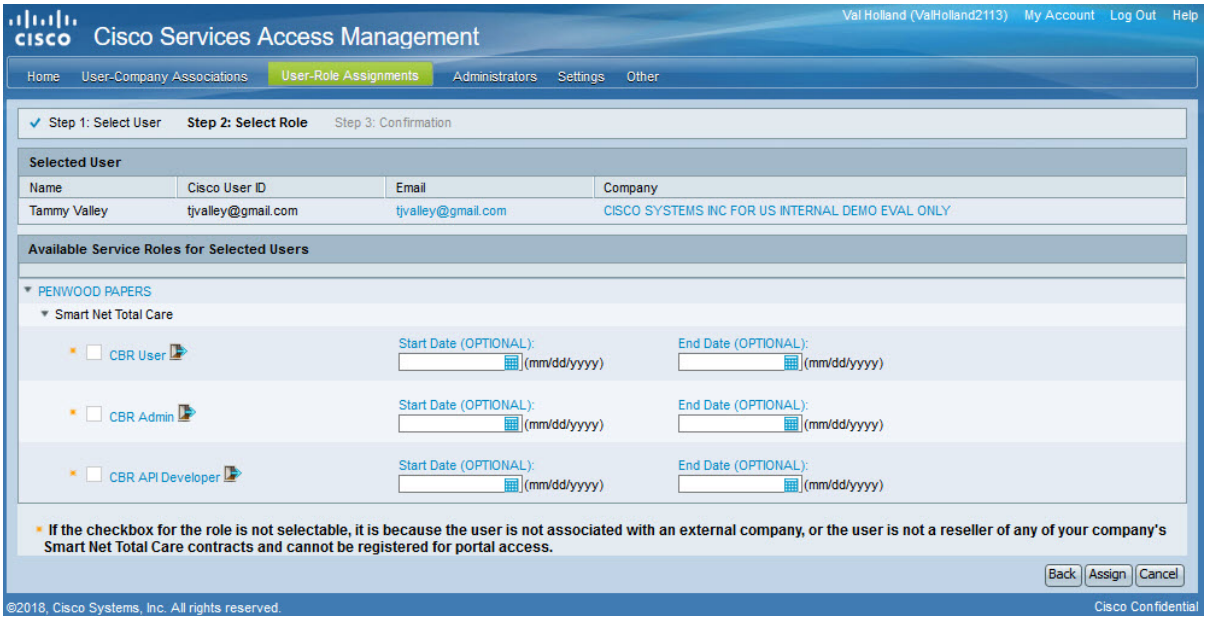
The Cisco User ID and email must match an active Cisco User ID or User outside of the Party hierarchy, and must not be in revalidation status.

Click “Submit”, and then check the checkbox beside the appropriate user.



Click “Next”.



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Click the ▶ icon next to the Cisco service offer to display the list of available roles. In this example, the service offer is Smart Net Total Care.

Hover over each role for a description of the role, and then select the appropriate role for the external user.

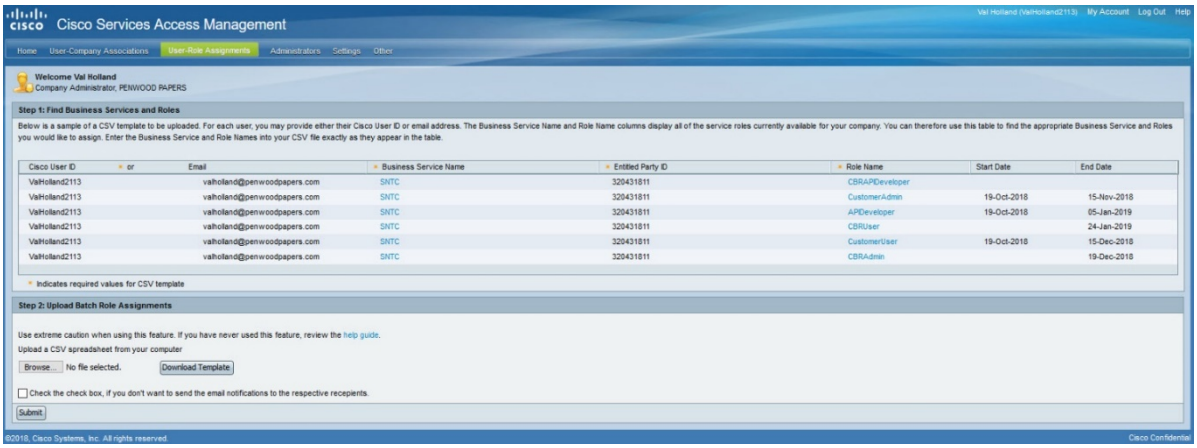
NOTE: If the user ID and email entered are not valid, the roles are not available for selection.

Click "Assign" after selecting the appropriate role. The system displays a confirmation message.

Perform User-Role Assignment via Batch Upload

Instead of performing a User-Role assignment individually using the above process, the Delegated Administrator can associate multiple users to multiple roles through a batch upload, using a provided spreadsheet template. This feature may be especially useful to onboard or migrate users from another system or user repository.

Use the top menus to navigate to "User-Role Assignments → Batch Upload". The various Business Services that this company is subscribed for and the Service Roles available for each of the Business Services are listed in the table on the page.



The Delegated Administrator must initially download the template from the" Step 2: Upload Batch Role Assignments" section. , and save the file as "roleBatchTemplate.csv". This file can be re-used each time multiple user roles need to be assigned by updating the details of users in the file.

When performing a batch upload of user-role assignments, an appropriate error message in the confirmation email will indicate if a CBR role cannot be assigned to a user.

Open the saved file, and enter the user details as required.

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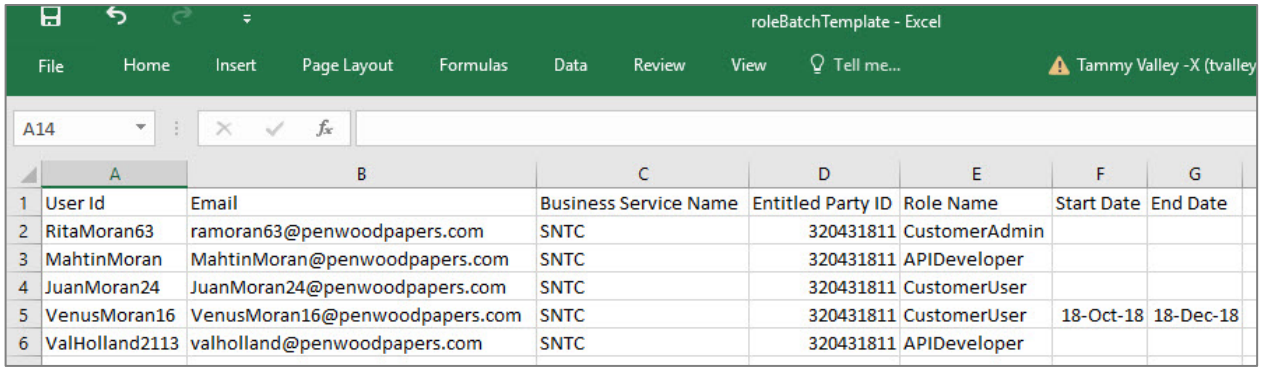
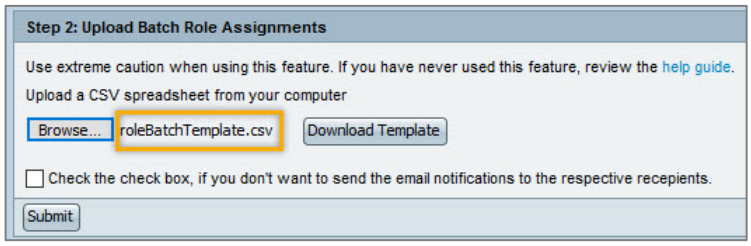


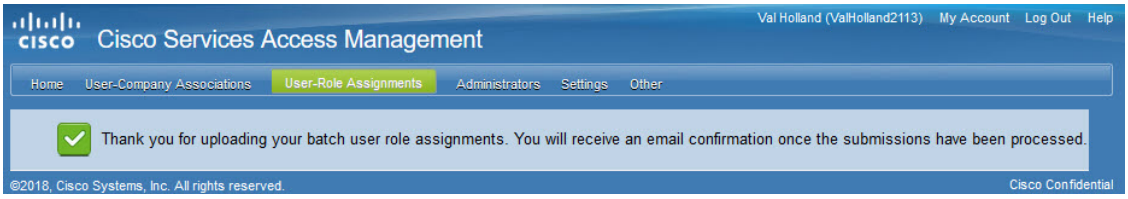
	A	B	C	D	E	F	G
1	User Id	Email	Business Service Name	Entitled Party ID	Role Name	Start Date	End Date
2	RitaMoran63	ramoran63@penwoodpapers.com	SNTC	320431811	CustomerAdmin		
3	MahtinMoran	MahtinMoran@penwoodpapers.com	SNTC	320431811	APIDeveloper		
4	JuanMoran24	JuanMoran24@penwoodpapers.com	SNTC	320431811	CustomerUser		
5	VenusMoran16	VenusMoran16@penwoodpapers.com	SNTC	320431811	CustomerUser	18-Oct-18	18-Dec-18
6	ValHolland2113	valholland@penwoodpapers.com	SNTC	320431811	APIDeveloper		

After entering the data into the spreadsheet, save the file in an accessible location. Note that any change to the file type, format, or column headers will result in an error during the upload.

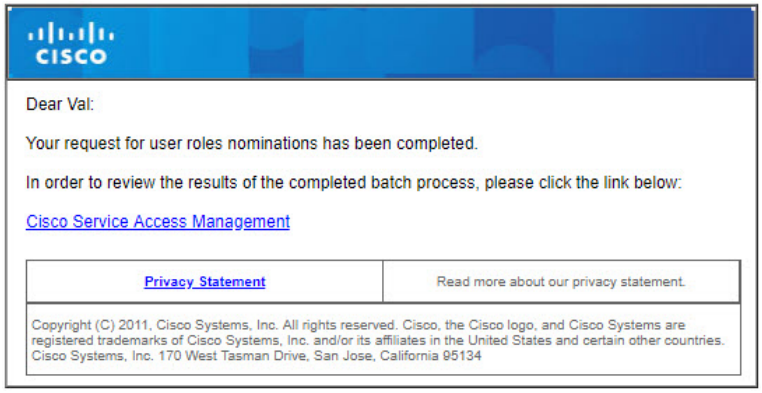
Click the “Browse” option to find the saved spreadsheet file. The filename appears on the page.



Optionally, check the checkbox if the email notifications to the respective recipients should be suppressed. Click “Submit” to complete the upload. The system displays a batch upload message on the page.



Once submitted the batch takes approximately 15 minutes to be loaded into the system as the batch job synch up runs every 15 minutes.



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The Delegated Administrator receives an email about the batch request with a link to check on the batch upload results. If there was an error in assigning roles, the list of users and the reason are displayed.

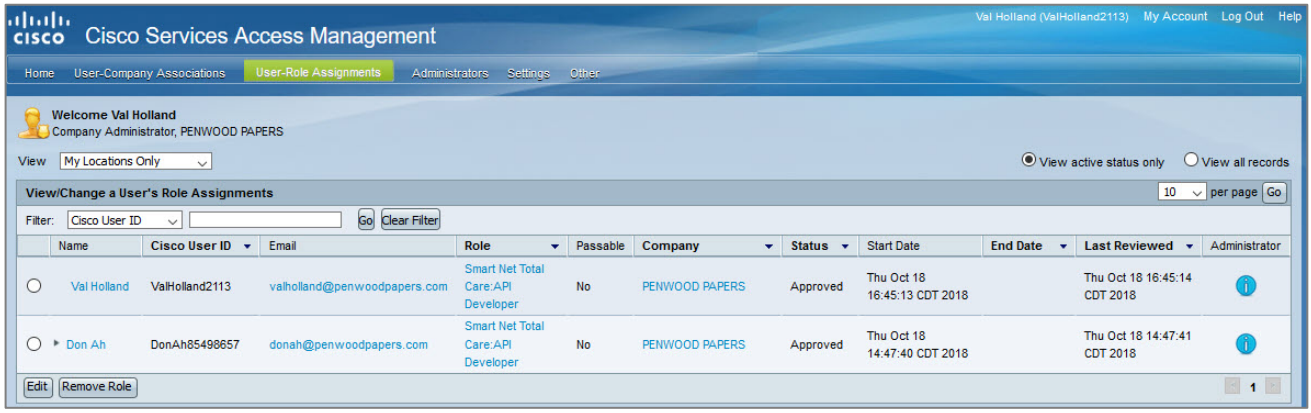
Users assigned successfully to the roles will be notified via email that they have been granted the role.

View or Edit Existing User Role Assignments

Delegated Administrators have the flexibility to change an existing user's role assignments. This may be required when the user no longer requires the access previously approved for them.

Use the top menus to navigate to "User-Role Assignments → View/Change a User's Role Assignments". A tabular list of all existing user role assignments for the company is displayed. Use the filter to narrow the list displayed based on Cisco user id, first name, last name or by clicking on the headers of the table displayed.

Click the ▶ icon next to a user's Name to display all of their currently-assigned roles.



Use the radio button to select the user role assignment to be modified. Then either click "Remove Role" to quickly inactivate the selected user role assignment, or click "Edit" to add, remove, or change all role assignments for the selected user. Each function is further described in the sections below.

Remove Role

Click the "Remove Role" button to remove the currently-selected role assignment. A pop-up displays to confirm the decision. Click "Yes" to confirm the change, and a confirmation message is displayed.

The user is notified via email about the changes made to their account.

All Delegated Administrator(s) for the company are also notified, based on their notification preferences, of the change made to the user role assignment.

Add, Remove, or Change Role Assignment Dates

Click the "Edit" button to add, remove, or change the Start Date and/or End Date of the selected user's existing user role assignments.

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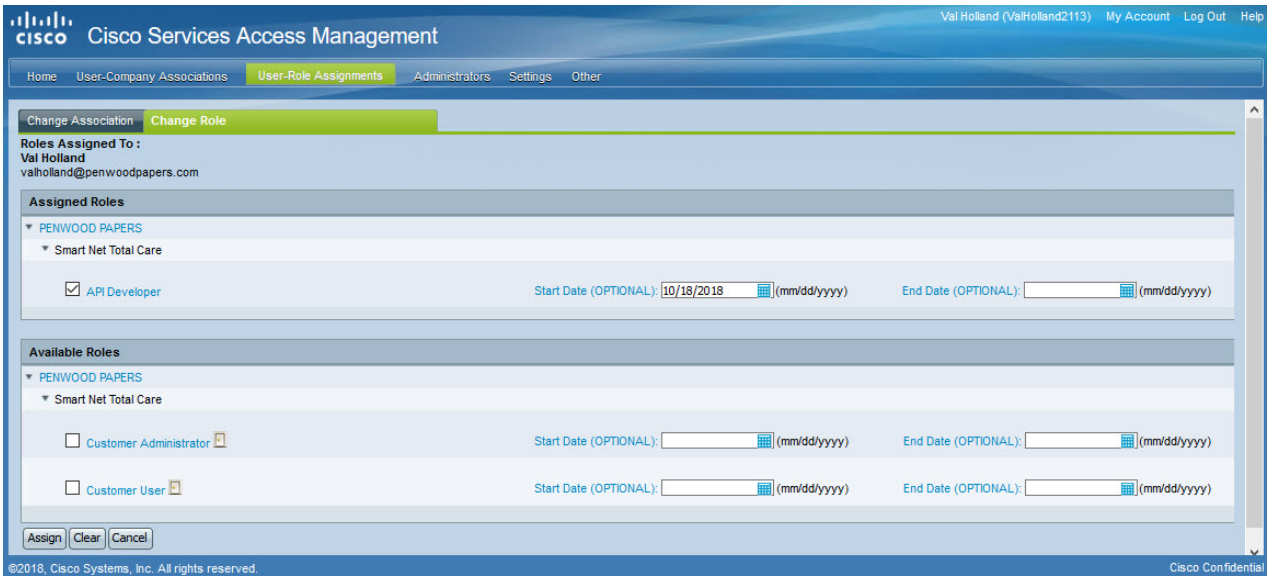

Un-check a checkbox next to an Assigned Role to remove that role assignment for the user.

The Start Date and/or End Date of an assigned role can be added, changed, or deleted. If the Start Date is blank, the role assignment will be immediately active. If the End Date is blank, the role assignment will remain active indefinitely, until the company's service program enablement expires.

Checking a checkbox next to an Available Role assigns that new role to the user. Entering a Start Date or End Date for the role assignment is optional.

NOTE: Clicking the "Clear" button removes the checkmarks from all checkboxes on the page. This means all user role assignments will be removed if the Assign button is then clicked.

After making changes, click "Assign". A confirmation message is displayed.

Upon agreeing to the terms in the verification dialog box, click "Confirm" to complete the new role assignment. The user is notified via email about the changes made to their account.

All Delegated Administrator(s) for the company are notified, based on their notification preferences, of the change made to the user role assignment.

View or Edit Existing External User's Role Assignments

To view or edit the role assignment of an existing external user, navigate to User-Role Assignments -> View/Change External User's Role Assignments.

Follow the steps in the View or Edit Existing User Role Assignments section above.

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Delegated Administration

Delegated Administration allows for independently deciding and managing who in the company get access to which Cisco Service programs. Depending on the size of the company or the number of users, the Delegated Administrator may choose to manage all user requests, or nominate additional company administrators to manage the load, allowing centralization or decentralization of administration according to the company's desired policy or needs. This administrative structure can be changed over time, based on growth and usage by additional service programs.

Assign Additional Roles to a Delegated Administrator

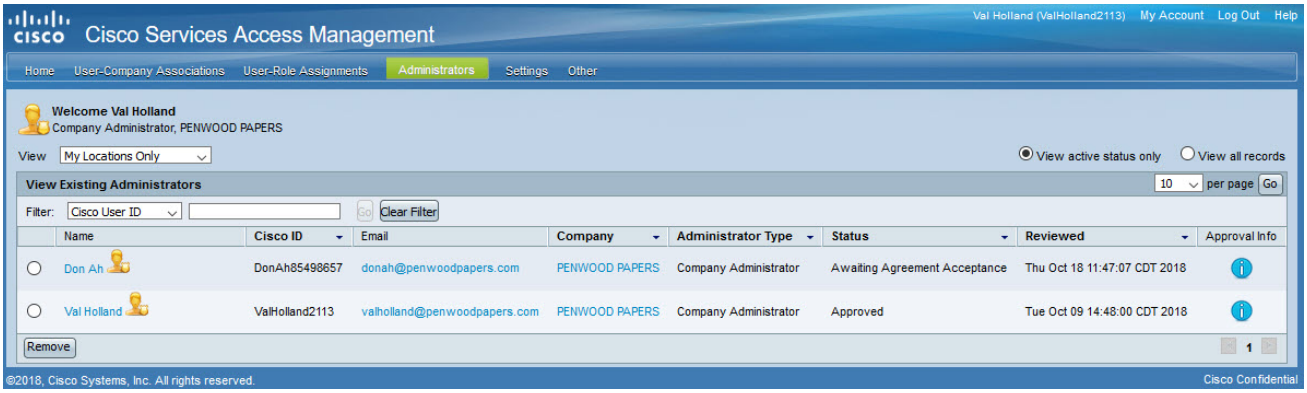
The Delegated Administrator role allows for associating users to the company and assigning service access roles to users. To have access to specific Cisco Business Services, the Delegated Administrator must also assign one or more roles to themselves to gain access to the protected Cisco Services available to the Delegated Administrator's company.

To do this, navigate to "User-Role Assignments→ Assign Roles to Users" from the top menu. Then follow the steps in the Internal Roles to Users Inside the Company section.

View Existing Delegated Administrators

Delegated Administrators can view existing Delegated Administrators for the company by selecting "Administrators → View Existing Administrators" from the top menu.

The system displays all Delegated Administrators for the company, along with the status. The sample below shows one active Delegated Administrator and another Delegated Administrator with the status of "Awaiting Agreement Acceptance". This means that particular Delegated Administrator has yet to sign the Cisco Services Access Management legal agreement which is required to be a Delegated Administrator for the company.



Remove Existing Delegated Administrator

Delegated Administrators can remove the Delegated Administrator role from themselves or any other Delegated Administrator in the company.

To remove an existing Delegated Administrator from the company, from the top menus navigate to "Administrators → View Existing Administrators". Select the specific administrator and then click the "Remove" button.

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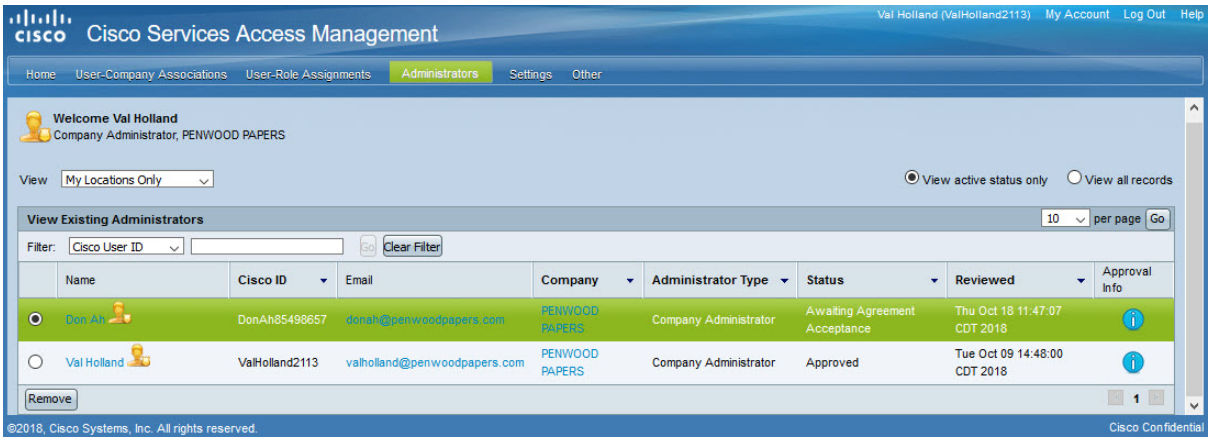

The system displays a confirmation dialog box.

Click “Yes” to continue with the removal of the selected Delegated Administrator(s), or click “No” to cancel the transaction.

Nominate Additional Delegated Administrators

Delegated Administrators can nominate additional Delegated Administrators for the company. The additional administrators do not need to reset the company settings unless they have been nominated for a different location of the company.

There are two types of administrators:

- Company Administrators — Can set up Company settings, approve/deny/make user-company associations, assign roles to users, including Delegated Administrators, and establish preferences for receiving email notifications.
- Role Administrators — Can only assign roles to users and establish preferences for receiving email notifications.

These two administrator types are described in detail below.

Company Administrator

To nominate additional Delegated Administrators for the company, use the top menus to navigate to “Administrators → Nominate an Administrator”.

From the “Step 1: Select Administrator Type” page, click the “Company Administrator” radio button, and then click “Next”.

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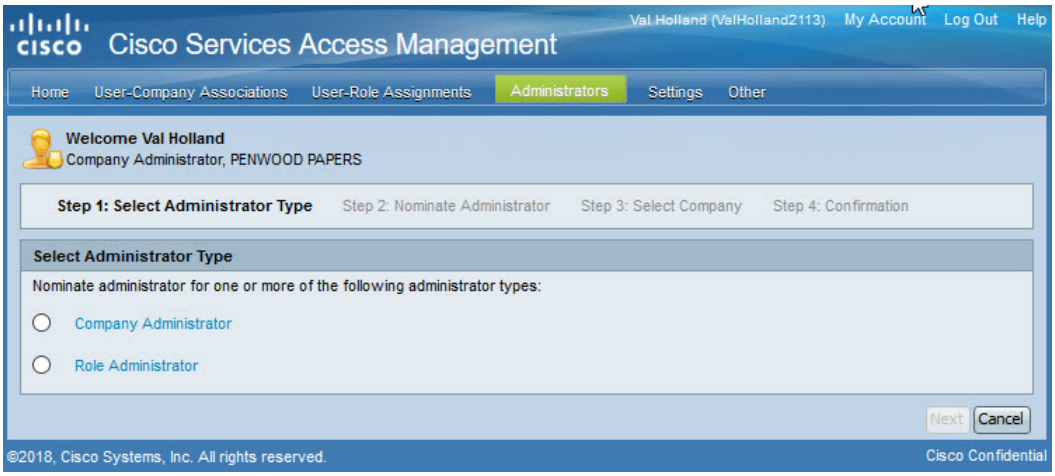
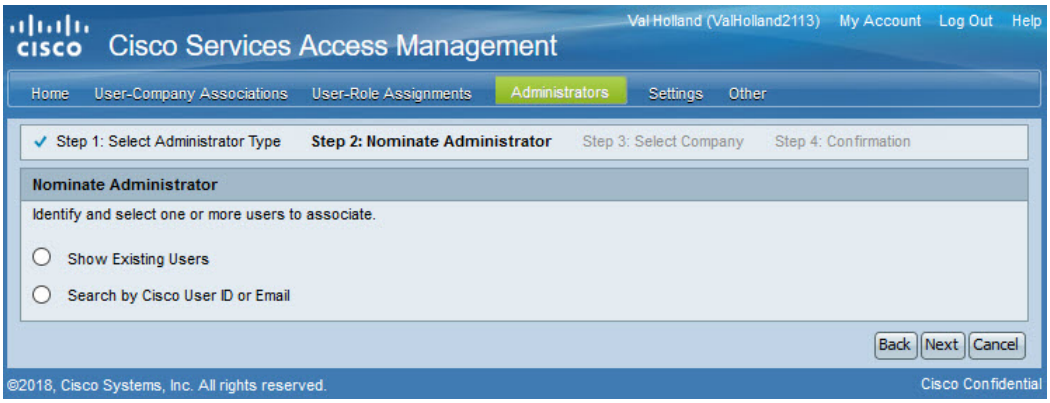
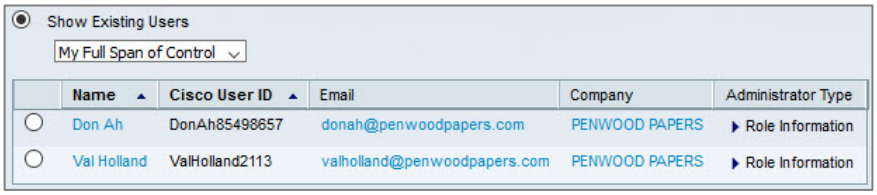


From the "Step 2: Nominate Administrator" page, click the radio-button for "Show Existing Users", or "Search by Cisco User ID or Email".



Show Existing Users



Search by Cisco User ID or Email

Based on the selection the system displays a list of users.

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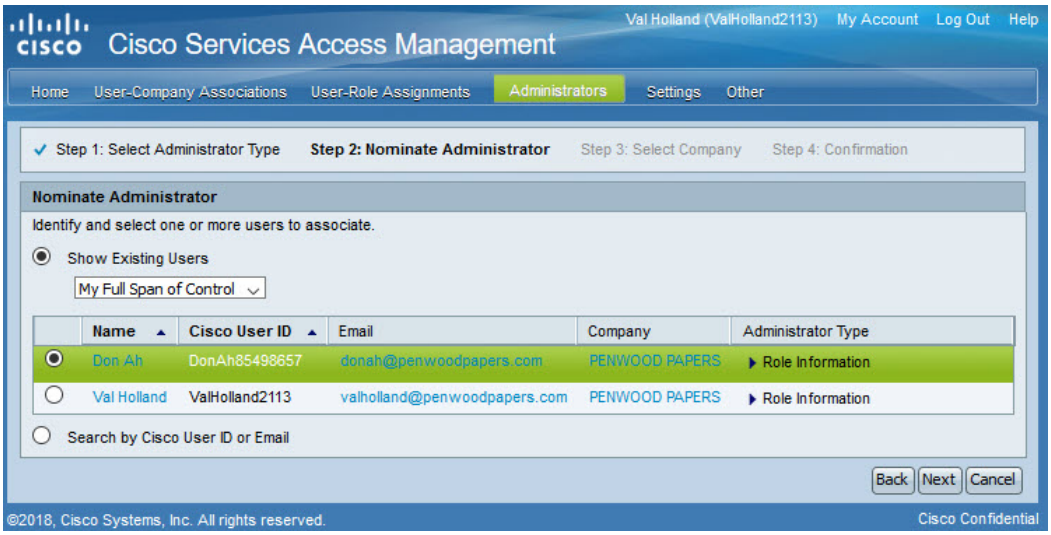
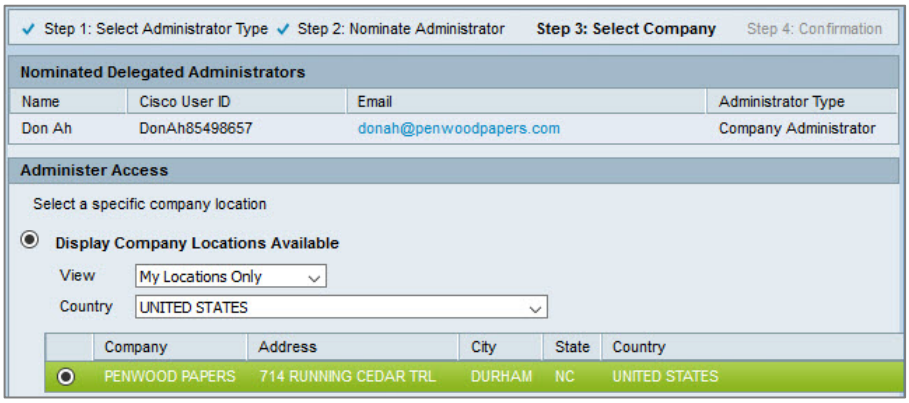


Select the user to be nominated, and then click “Next”.

From the “Step 3: Select Company” page, the Delegated Administrator can either assign the additional Administrator to the same company as a backup Administrator or to a new company location.

Choose the appropriate radio-button option, to either “Display Company Locations Available” or “Search for a Specific Location”.

Display Company Locations Available



From the list of companies, click the radio button next to the company for which the new administrator will be responsible. Click “Finish”.

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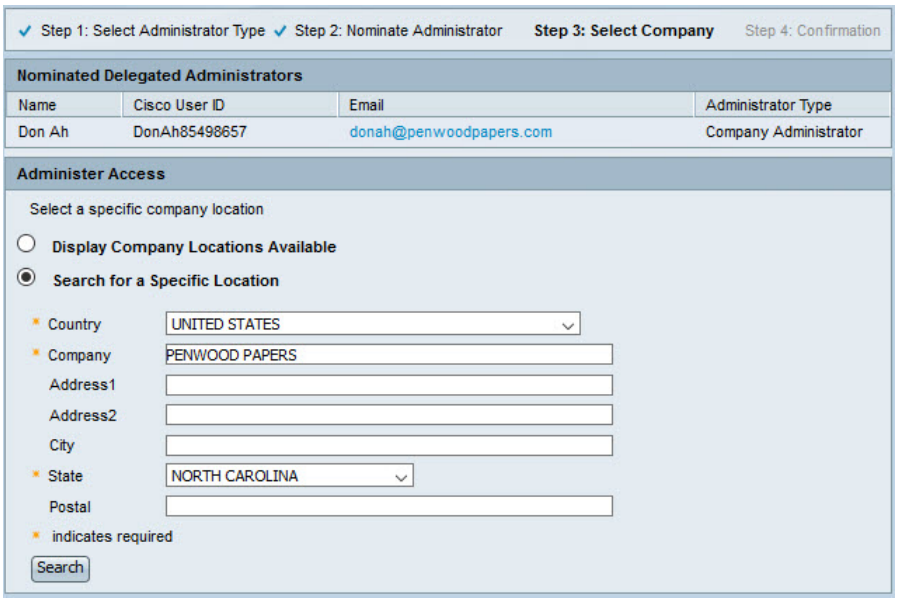
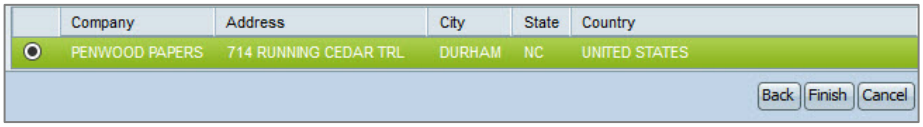
Search for a Specific Location



Type the information in all required fields, and any optional fields if desired, and then click “Search”. The system displays a list of all companies associated with the primary Delegated Administrator’s company.



Select the company for which the new administrator will administer access, and then click “Finish”.

The system displays a confirmation message.

The user nominated as the Company Administrator is notified via email that their account is now associated with that company and that they have been nominated as the Company Administrator. The newly-nominated Company Administrator must click the link in the email to go to the Cisco Services Access Management application and review and accept the legal agreement in order to activate their assigned role. Otherwise, the nomination remains in pending status.

Existing Delegated Administrators of the company also receive email notifications, based on their notification settings, indicating that a user has been nominated as the Company Administrator for their company.

Role Administrator

A Delegated Administrator can nominate Role Administrators to assign, approve or reject user role requests. Role Administrators are not authorized to change any company settings or make/approve user-company associations. That responsibility remains with the Company Administrator.

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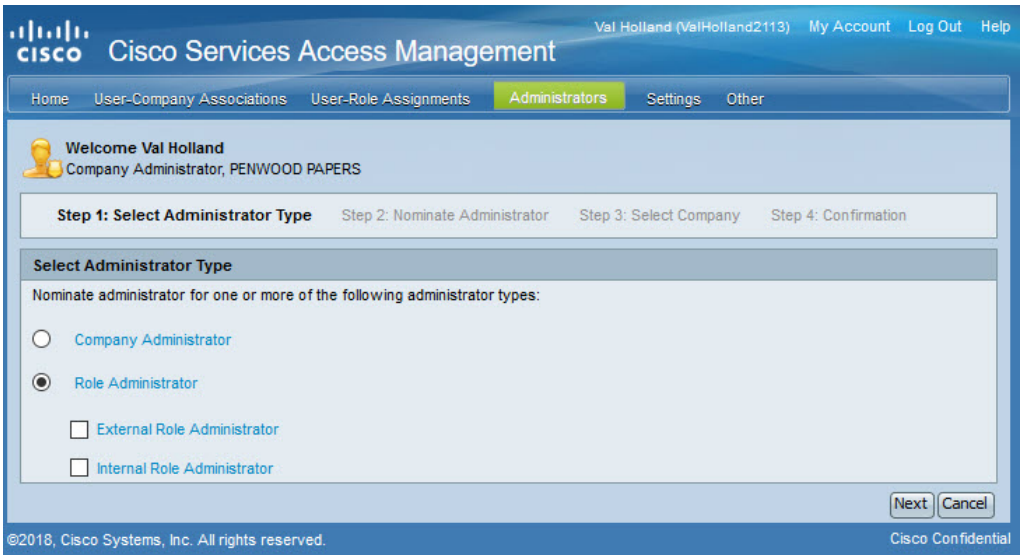
There are two types of Role Administrators:

- Internal Role Administrator — Can assign roles within the company only
- External Role Administrator — Can assign roles to users outside the company and within the company

Cisco predefines roles such that some can only be granted to users within the Delegated Administrator's own company or others outside of the company, and some are not able to be granted by a Role Administrator at all. The Role Administrator can only assign the roles that they themselves have been granted by the Company Administrator.

For example: Company Administrator wants to allow someone in the company to handle role assignment for a certain set of roles. The Company Administrator nominates the user to be an Internal Role Administrator and assigns that user the set of roles they can assign to other users within the company.

To nominate a Role Administrator for the company, use the top menus to navigate to "Administrators → Nominate an Administrator".



From the "Step 1: Select Administrator Type" page, select the Role Administrator option.

Use the checkboxes to indicate whether this Role Administrator will be assigning roles to users outside the company (External Role Administrator), within the same company (Internal Role Administrator), or both. Click "Next".

The "Step 2: Nominate Administrator" page provides two options to locate the desired user: Show Existing Users and Search by Cisco User ID or Email.

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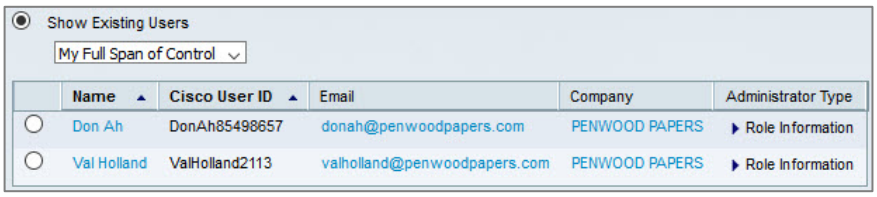
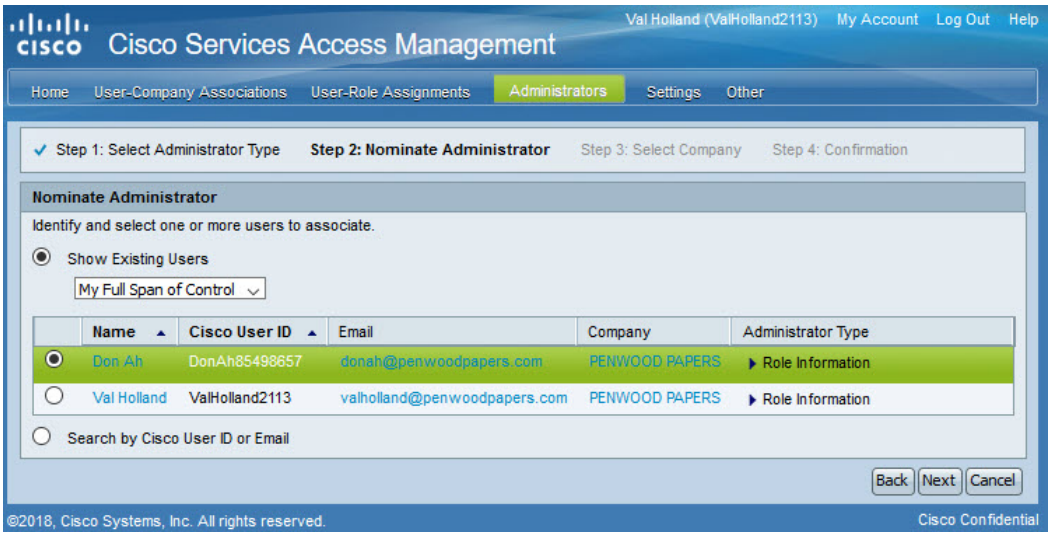
Show Existing Users



Search by Cisco User ID or Email

Based on the selection the system displays a list of users. Select the user to be nominated.



Click the radio button next to the appropriate user, and then click “Next”.

From the “Step 3: Select Company” page, the Delegated Administrator can either assign the additional Administrator to the same company as a backup Administrator or to a new company location.

Choose the appropriate radio-button option, to either “Display Company Locations Available” or “Search for a Specific Location”.

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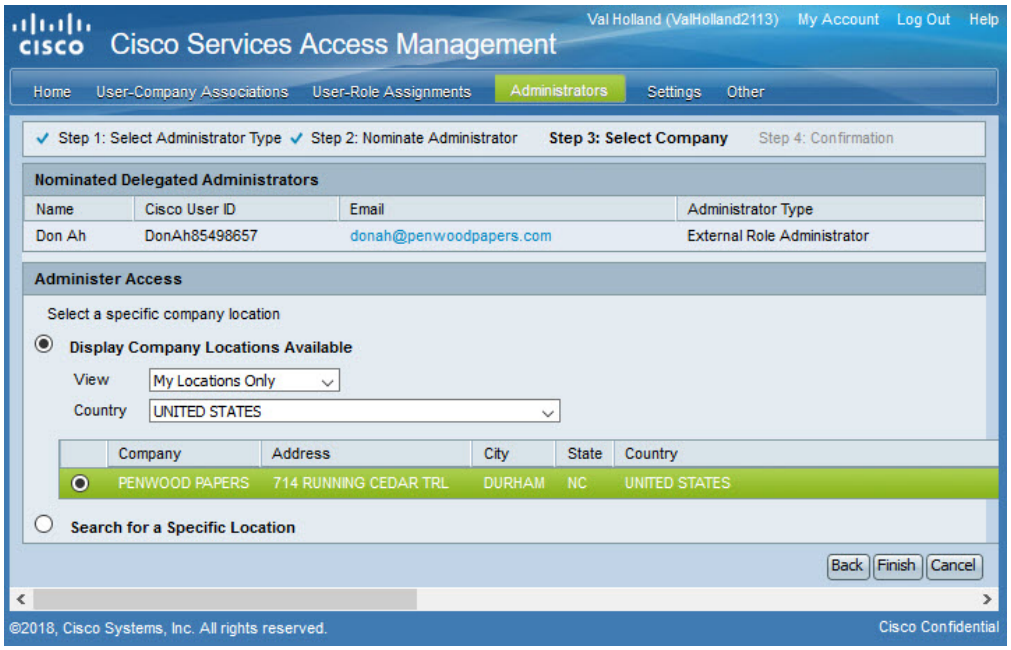
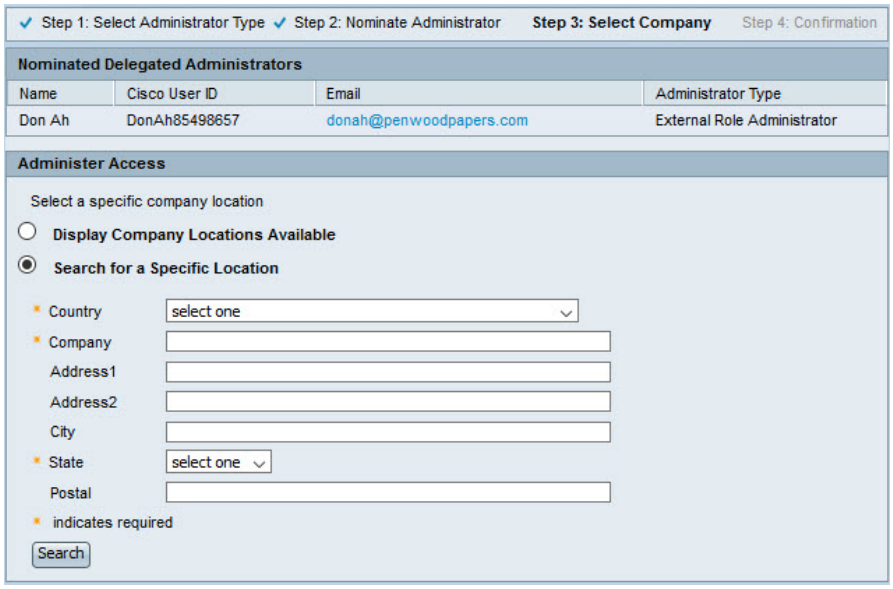
Display Company Locations Available

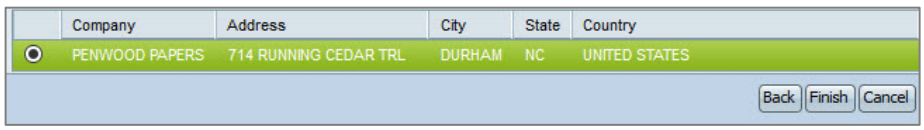


From the list of companies, click the radio button next to the company for which the new administrator will be responsible. Click “Finish”.

Search for a Specific Location



Type the information in all required fields, and any optional fields if desired, and then click “Search”. The system displays a list of all companies associated with the primary Delegated Administrator’s company.



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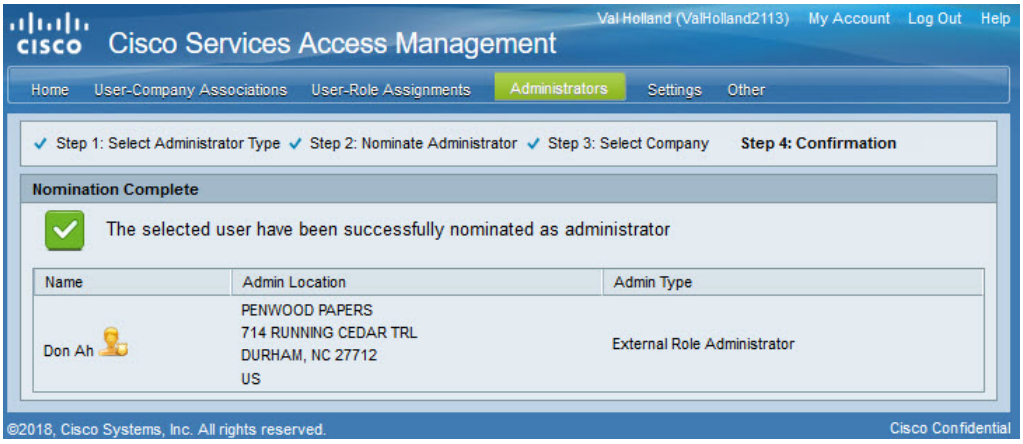
Select the company for which the new administrator will administer access, and then click “Finish”.

The system displays a confirmation message.



The user nominated as the Role Administrator is notified via email that their account is now associated with that company and that they have been nominated as the Role Administrator. The newly-nominated administrator must click the link in the email to go to the Cisco Services Access Management application and review and accept the legal agreement in order to activate their assigned role. Otherwise, the nomination remains in pending status.

Existing Delegated Administrators of the company also receive email notifications, based on their notification settings, indicating that a user has been nominated as a Role Administrator for their company.

To assign roles to the user, the Role Administrator should follow the process described in the Assign User Roles using Cisco Services Access Management section.

Nominate Multiple Additional Delegated Administrators using Batch Upload

Multiple users can be simultaneously nominated as additional Delegated Administrators for a company by doing a “batch upload” in Cisco Services Access Management.

Use the top menus to navigate to “Administrators → Batch Upload”. Enter the details to search for the company location for which the additional Administrators will be nominated, and then select the company location from the list displayed.

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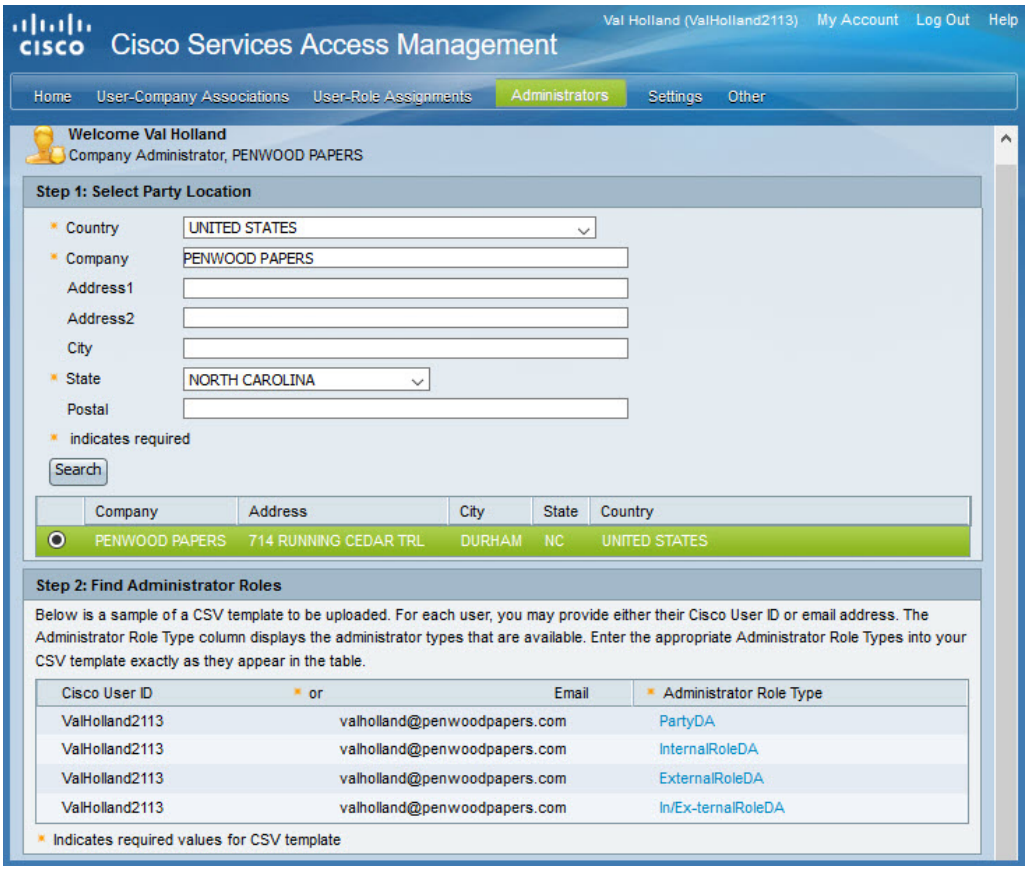
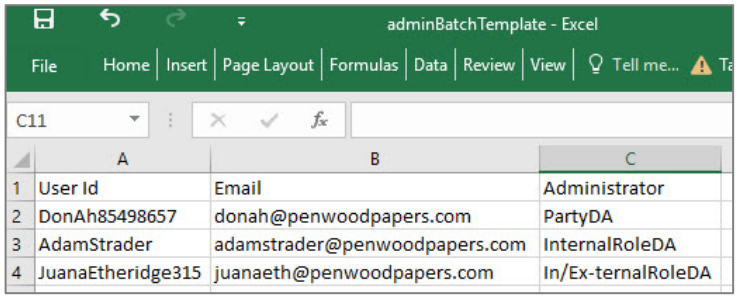


Download the template for uploading the list of users. Save this file locally as “adminBatchTemplate.csv”. Enter the details of the users to be nominated as Delegated Administrators.



Changing the filename, file format or the column headers will result in an error in completion of the request to nominate multiple users as Delegated Administrators.

This file can be re-used to nominate additional Delegated Administrators by simply changing the details of the users in the file uploaded.

Click the “Browse” button to upload the template with the Administrator information.

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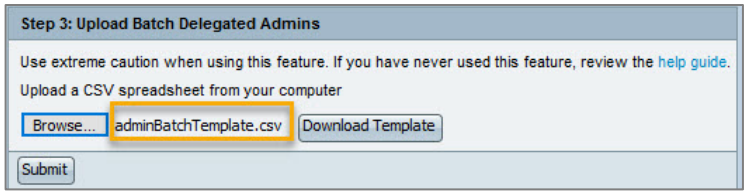
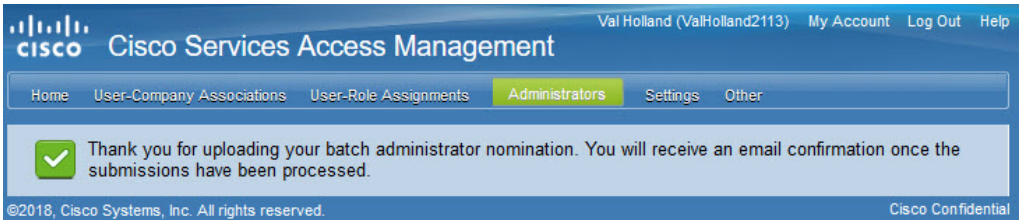


Click "Submit" to initiate the batch upload of the administrators. A confirmation message is displayed.



If an error occurred in nominating any of the users in the list, their information will be displayed on the confirmation page along with the reason for them not being nominated.

The users nominated successfully as an Administrator will be notified via email about their association with the company and their nomination to become the Role Administrator for the company.

Existing Delegated Administrators of the company will also be notified via email, based on their notification settings, that a user has been nominated as the Delegated Administrator for their company. Once submitted the batch takes about 15 minutes to be loaded into the system as the batch job synch up runs every 15 minutes.

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Other Menu Option

The Cisco Services Access Management application provides access to additional features that are relevant to the Delegated Administrator. To view these, navigate to the “Other” option on the main navigation bar.

Links to additional Cisco access management tools can be found in the “Other” menu. The list of links is filtered to only show those tools to which a user is authorized, and may include:

- Service Access Management Tool
- Web Services
- Enable Cisco Services programs for your Company
- Review Agreements

Service Access Management Tool

Delegated Administrators who are also BID/Contract Administrators in the Service Access Management Tool (SAMT) will see this listed on the “Other” menu. SAMT Administrators use that tool to manage user’s access to technical services (TAC support, hardware RMA, software download) for the specific service contracts they administer. If a user needs to be able to obtain technical support for the devices they view in the SNTC portal, they must be separately granted support access to the service contracts covering those devices.

Web Services

A Company Administrator can use the top menu to navigate to “Other → Web Services” in order to access Cisco’s Web Services API Console, which allows our partners and customers to access and consume Cisco data in the cloud in a simple, secure and scalable manner. The console provides a simplified, guided experience, through which partners and customers can easily learn about these web services and integrate them within their internal tools, systems and applications; secure data and credentials using industry standard authentication and role-based authorization; and scalability to support diverse data consumption scenarios, like mobile apps, smart devices and Web applications.

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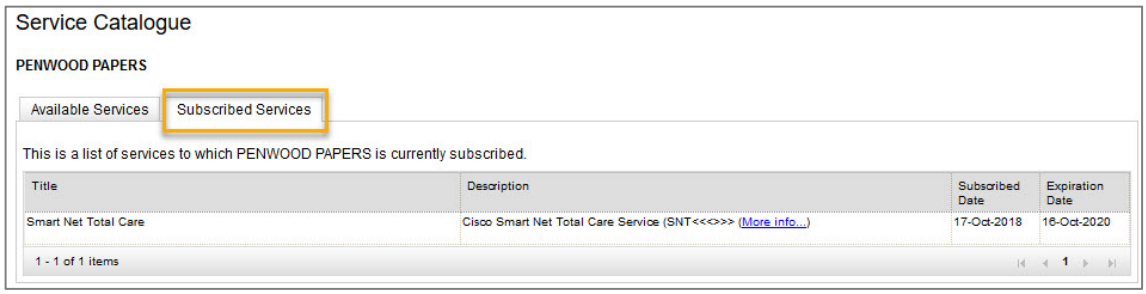
Enable Cisco Services Programs for your Company

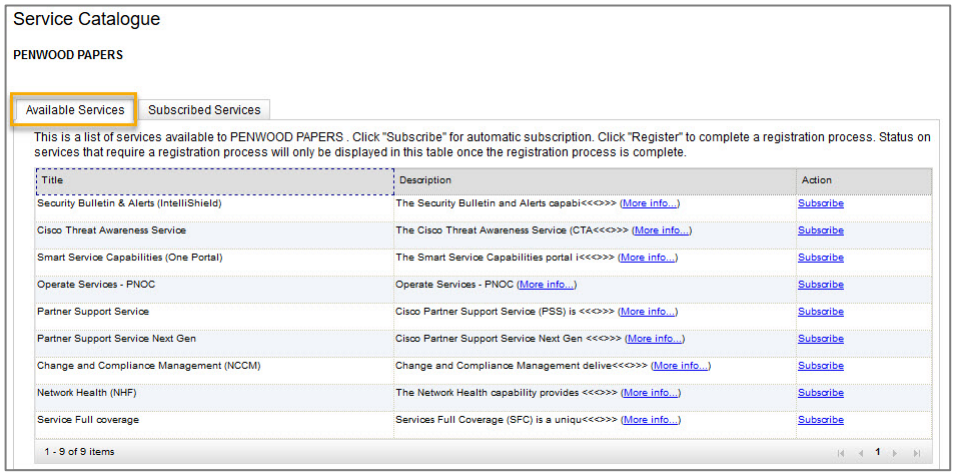
Partners and Direct Customers purchase service contracts from Cisco through service programs. Once the company has an active Delegated Administrator, some service programs are automatically enabled for the company when a service contract is signed, while others must be manually requested.

Depending on your Cisco Services Access Management access, the system may display the following.

Subscribed Services — View the services to which the company is currently subscribed.



Available Services — View additional services or programs the company may qualify for.



For any listed service, click the “Subscribe” link to submit a request to validate the existence of any necessary service contract. The requestor receives an email notification with the result of that contract check. If the validation passed successfully, the company’s Delegated Administrator also receives an email, notifying them of the newly-enabled service, and instructing them to assign the corresponding service access roles.

Review Agreements

All users of Cisco Services Access Management can review the legal agreements associated with their roles. To review the agreement navigate to Other → Review Agreements. From the drop-down field, select either:

- CSAM Legal Agreement, or
- User Role Agreement.

The system displays an on-screen only version of the legal agreement.

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Appendix A: Frequently Asked Questions

1. Who uses Cisco Services Access Management?
2. Who, at my company, can get nominated as a Delegated Administrator?
3. As the first Delegated Administrator for a large company, how can I most efficiently manage access for users that are geographically dispersed?
4. My company has a lot of users. Do I have to add each one manually?
5. An associated user has left my company. What should I do?
6. I nominated additional Delegated Administrators who will manage their company organization user-company associations and user-role assignments. What do I need to do to ensure that I am not the first person contacted for user access requests?
7. How can I see who has associated a user or nominated the additional company administrator?
8. A user is having difficulty requesting association to my company through Profile Manager. What might the problem be, and how can I solve it myself?
9. A user does not see the link in Profile Manager to request for additional access to Cisco Services delivered by Cisco to my company. What could be the issue?
10. As the Delegated Administrator, I had asked users to request for a specific role using Profile Manager. But they cannot see this particular role in the list displayed there. Why is this happening?
11. I get an error while using the "batch upload" feature in Cisco Services Access Management. What could be the issue?
12. When I attempt to associate a user to my company or nominate an additional administrator, I see the "User is already associated to another company" message on the screen. How can I associate the user or nominate the administrator?
13. I successfully registered as the Delegated Administrator and then was assigned the role of Customer Administrator in Cisco Services Access Management so why am I not able to access the Smart Net Total Care portal?
14. How do I nominate my Cisco Partner as a Delegated Administrator for my company?
15. How do I disassociate myself from my company?

1. Who uses Cisco Services Access Management?

A Cisco customer or partner who uses the Smart Net Total Care self-registration process to onboard themselves as the Delegated Administrator for their company.

Cisco internal Administrators also use Cisco Services Access Management to nominate Delegated Administrators for a company.

Once nominated, company Delegated Administrators can perform the following tasks in Cisco Services Access Management:

- Establish company settings to specify the criteria for user requests for self-association to the company, and approve the requests
- Associate user(s) to their company
- Assign roles to associated users

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- Nominate additional Delegated Administrators for their company
- Establish their notification settings such as when and when not they wish to receive email notifications

Refer to Appendix B for additional information on the features available in Cisco Services Access Management.

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2. Who, at my company, can get nominated as a Delegated Administrator?

A Delegated Administrator should be a trusted person at your company who, once trained on the application, is knowledgeable about the company's employees and which Cisco services they do and do not need to access.

One person at your company is nominated as the first Delegated Administrator, and needs to accept the Terms and Conditions on behalf of their company. That first Delegated Administrator can choose to pass this responsibility on to another person at their company, nominate a backup administrator, or nominate additional administrators to manage additional locations of the company

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3. As the first Delegated Administrator for a large company, how can I most efficiently manage access for users that are geographically dispersed?

Cisco Services Access Management is designed to flexibly accommodate companies of various sizes and allows for centralization or decentralization of administration according to each company's needs. The Delegated Administrator for a company has the option to nominate additional company administrators, or set up multiple branch locations that can be administered separately by multiple administrators. These Delegated Administrators will then be able to manage groups of users based at a company location. For details on how to nominate additional company administrators, refer to the *Delegated Administration* section in this document.

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4. My company has a lot of users. Do I have to add each one manually?

Cisco Services Access Management provides batch upload functionality to simultaneously associate multiple users to your company. Refer to the Perform User-Company Association via Batch Upload section in this document to understand how to use this feature.

Alternatively, you can establish the company settings in Cisco Services Access Management to automatically approve all self-association requests by users with matching criteria. Auto-approval of requests can be set up based on one or a combination of the following:

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- Company passcode matching – Generate a unique company passcode and provide it to the users to specify in Cisco Profile Manager when requesting company association.
- Email domain matching – This may be your company email domain which would be the same for all users in your company and used by them while registering on Cisco.com.
- Company name and address matching —Allow users to request company association by searching on company name and address.

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5. An associated user has left my company. What should I do?

As the Delegated Administrator, it is your responsibility to disassociate this user from your company using the Cisco Services Access Management "Change a User's Company Association" feature.
As soon as the user's company association is removed, all roles assigned to this user for access to additional Cisco Services will automatically be deleted.

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6. I nominated additional Delegated Administrators who will manage their company organization, user-company associations, and user-role assignments. What do I need to do to ensure that I am not the first person contacted for user access requests?

Once you have nominated additional company Delegated Administrators, they will all have the same access privilege in Cisco Services Access Management. You can now go to the "Change Notification Preferences" in Cisco Services Access Management and select the appropriate setting to ensure that your contact information is not displayed to users associated to your company. Additionally, you can also set your preference to not receive any notification for a user submission. You should, however, periodically access Cisco Services Access Management to look for any overdue requests that the other Delegated Administrators have not yet acted upon.

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7. How can I see who has associated a user or nominated the additional company administrator?

To see who nominated the additional company administrator for your company or who associated a particular user to your company, go to the "View Existing Administrators" or the "View Existing Associations" screen. Hover your cursor over the " " icon next to their name to display the details of the person who nominated that administrator or accepted that user-company association. The information pop-up shows the first person to nominate the user as well as the last person to modify user information. For users or administrators who onboarded via the self-registration process, the information appears as Self-Service Onboarding.

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8. A user is having difficulty requesting association to my company through Profile Manager. What might the problem be, and how can I solve it myself?

   Check with the user to see if the user details they specified in Cisco.com Profile Manager match the company self-association settings you have established.

- If the user did not register in Cisco.com with their company email address, then they cannot self-associate via email domain matching. If email domain matching is your preferred association method, then have them update their primary email address in Cisco.com Profile Manager.
- If the user does not have the company passcode, then they cannot self-associate if a company passcode is required.
- If the user is searching for the company by address, your company settings may be set to only allow users to associate to specific locations that have a Delegated Administrator assigned. They may need to remove some of the search criteria, and only search by company name and country.

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9. A user does not see the link in Profile Manager to request for additional access to Cisco Services delivered by Cisco to my company. What could be the issue?

   A user needs to first be associated with your company, before they can see what services may be available. The user will be able to see the link to request for additional access to Cisco Services only after their company association is in “Approved” status.

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10. As the Delegated Administrator, I had asked users to request a specific role using Profile Manager. But they cannot see this particular role in the list displayed. Why is this happening?

    The list of roles available in Profile Manager, for access to additional Cisco Services, depends on the company to which the user is associated. Verify that this user is associated to the correct branch/location of your company.

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11. I get an error while using the “batch upload” feature in Cisco Services Access Management. What could be the issue?

    The batch upload features are available to associate multiple users simultaneously to your company, or to nominate multiple users as additional Delegated Administrators for your company.
    An error in batch upload could be for one or a combination of the following issues:

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- Incorrect template name or format being used. Templates should be saved locally as "associationBatchTemplate.csv" for associating users, "roleBatchTemplate.csv" for assigning roles to users, or "adminBatchTemplate.csv" for nomination of company administrators
- Changes made to the original column headers in the template uploaded
- Removal of a column in the template
- User ID specified in the template is an invalid CCO ID or not registered on Cisco.com
- Email address specified in the template is incorrect
- User is already an active and existing delegated administrator or associated user for that company, or is already assigned the role listed in the template

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12. When I attempt to associate a user to my company or nominate an additional administrator, I see the "User is already associated to another company" message on the screen. How can I associate the user or nominate the administrator?

It is possible the user previously worked for a different company and is still associated to that company. Have the user request to be disassociated from the previous company, and then have them update their Cisco.com profile with current company information.

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13. I successfully registered as the Delegated Administrator and then was assigned the role of Customer Administrator in Cisco Services Access Management so why am I not able to access the Smart Net Total Care portal?

It can take up to 24 hours for the SNTC portal to recognize when new user access has been granted. If, after that time, you are still experiencing problems with the SNTC portal, please post your issue to the SNTC Support Community, so the appropriate team can investigate and resolve it: https://community.cisco.com/t5/smart-net-total-care/ct-p/4891-smart-net-total-care.

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14. How do I nominate my Cisco Partner as a Delegated Administrator for my company?

It is against Cisco policy to assign a Cisco Partner with any role other than the CBR User role, an external role. The only time a Cisco Partner can be assigned the role of Delegated Administrator is when it is for their own Partner company.

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15. How do I disassociate myself from my company?

To disassociate yourself from your company, go to your Cisco Account Profile https://rpfa.cloudapps.cisco.com/rpfa/profile/requestorupdate_association.do?. Click the Remove link beside the appropriate company name.

NOTE: If you are the only Delegated Administrator for your company, you will need to find another person within your company to become the Delegated Administrator. Each company must have at least one Delegated Administrator.

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Appendix B: Function-Based and Menu-Based Quick Reference

Welcome to Cisco Services Access Management

The instructional online help content referenced herein is organized both by function (or task), and on-screen menu option, for the most common Delegated Administrator actions.

Navigate By Function

Quick References

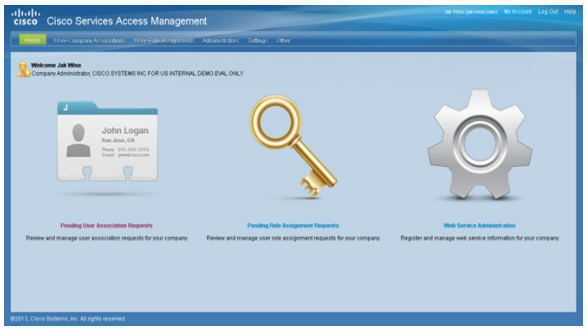
Getting Started

Onboarding a User

Batch Upload

Edit User Access

Remove User Access



Navigate By Menus

User Guide

Home
- Cisco Services Access Management Overview
- Introduction to Delegated Administration

User-Company Associations
- Managing User Association Requests
- Revalidate User Association Requests
- View Existing Associations
- Associate User to My Company
- Change a User's Company-Association
- Batch Upload

User-Role Assignments
- Pending Role Assignment Requests
- Assign Roles to Users
- Change a User's Role Assignments
- Change External User's Role Assignments
- Batch Upload

Administrators
- Nominate an Administrator
- View Existing Administrators
- Batch Upload

Settings
- Change Company Association Rules
- Change Notification Preferences

Other
- User Assignment to End Customer Company
- Web Services
- Enable Cisco Services programs for your Company

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Getting Started

Cisco Services Access Management provides for "party-centric" role-based access to new Cisco Smart Services. Rather than requiring a contract administrator to explicitly add a user to each and every contract in order to receive technical support, party-centric access allows for a company Delegated Administrator (DA) to associate users to their customer or partner "party" (a hierarchical level within your company / organization) and assign them to one or more user roles in order to grant access to the support services to which the company is authorized.

Quick References highlight the most common DA actions, and provide links back to the detailed step-by-step instructions in the online user guide.

This Quick Reference describes the first steps a new company Delegated Administrator should take to get started.

Accept Your Delegated Administrator Nomination During First Login

As a nominated DA, you received email notification that your Cisco account has been associated to your company, and that you have been nominated to become the Delegated Administrator for your company. Using a link in that email, the first time you log in to Cisco Services Access Management, you must view and then accept the terms & conditions. If you want to pass this responsibility on to someone else in your organization, you must first accept, and then nominate the other person.

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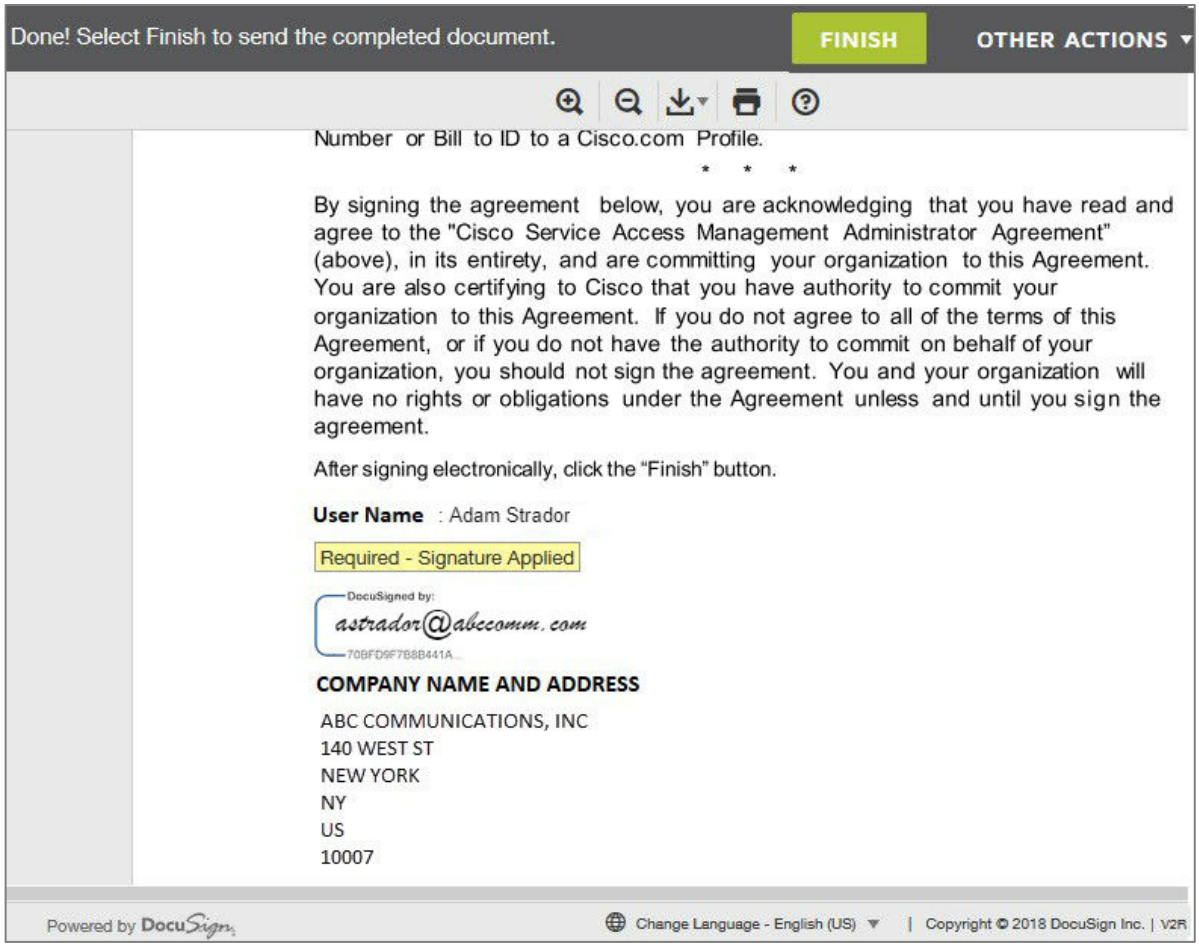

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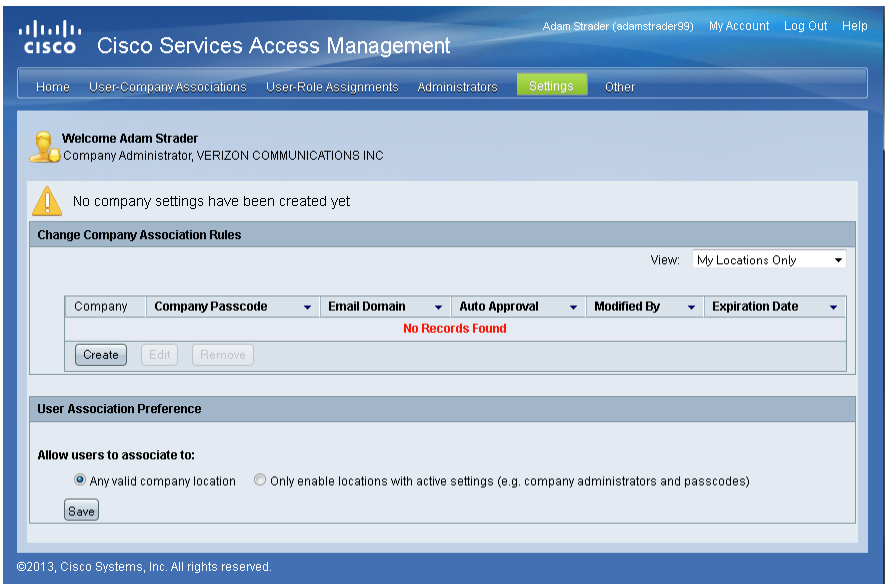
Establish Your Company and Administrator Settings

As the Delegated Administrator, you can define rules that will enable additional users to request association to your company, and how you will be notified to take action. If you prefer to manually perform all user associations yourself, you can skip this step. You can always return to this step, if you want to enable user self-association requests at a later time.

Company Association Rules

From the top "Settings" menu, select "Change Company Association Rules". Initially, there will be no records of any association rules setup for your company. Click the "Create" button to establish new rules for your company party, to allow users to request association based upon:



- Email domain matching
- Shared Company passcode
- Company name and address search

Through the establishment of the Company Settings, the Delegated Administrator can individually allow or not allow, or combine these options, in order to flexibly control the user self-association process.

Administrator Notification Preferences

Each Delegated Administrator can customize how and when they are notified of pending user self-association and role assignment requests. Use the top menus to navigate to "Settings," select "Change Notification Preferences," and specify whether to receive separate notifications for each request, or a summarized "daily digest.

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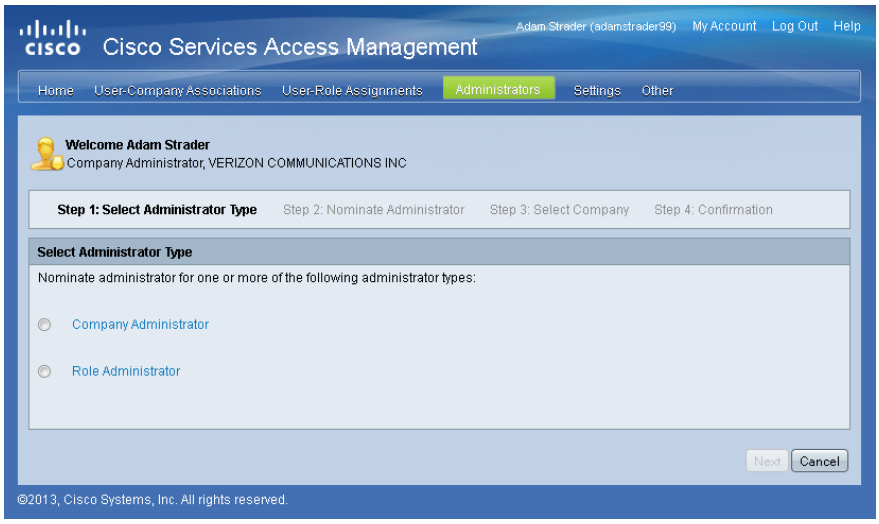
Nominate a Backup Delegated Administrator

You should nominate at least one additional person at your company to have Delegated Administrator privileges. Depending on the size of your company and the number of users, you may choose to centralize all users and administrators together, or create smaller decentralized groups, according to your company's desired policy or needs.



To nominate an additional administrator, from the "Administrators" menu, select "Nominate an Administrator". Select Company Administrator, enter the user's CCO ID or email address, and select the company location.

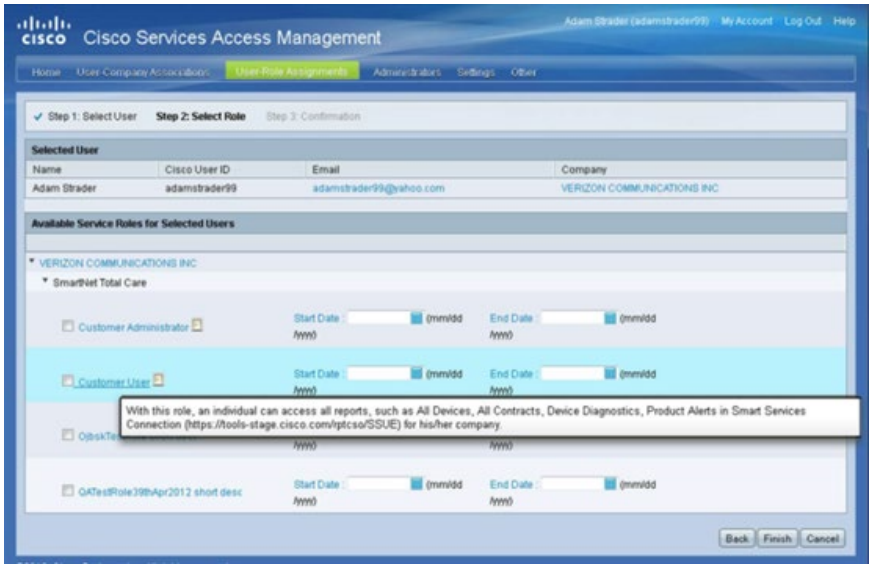
The nominated user will receive an email with a link to log in and accept the Delegated Administrator terms and conditions.

Assign Access Roles to Yourself

The Delegated Administrator role only gives you access to associate users to your company and assign service access roles to users. For you to have access to specific Cisco Business Services, you must assign one or more roles to yourself.

If you need access to functionality for multiple Business Services, you will need to assign a separate role for each Business Service.

For instructions on assigning roles, see the "see Onboarding a User" quick reference.



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Onboarding a User

Associate Users to your Company and Assign User Roles

Onboarding a user involves two steps:

- Associate the user to the Company
- Assign one or more roles to the user, for each of the services to which the company is authorized.

This quick reference describes the process of a Delegated Administrator performing all of the onboarding steps. For a summary of the user self-service process, see the "Managing User Requests" quick reference.

Note: In order for a user to be associated, he or she must first register for a Cisco account. You must know either their Cisco login ID or the email address they used when registering.

Associating a User to Your Company

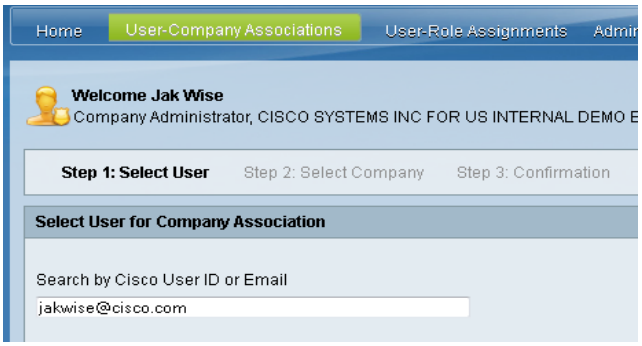
To associate a single user to your company, use the top menus to navigate to "User-Company Association" and select "Associate User to My Company".

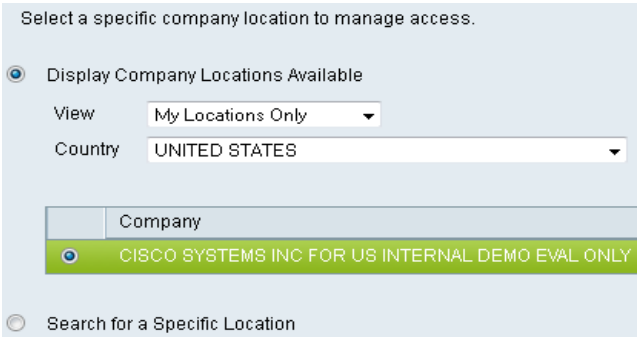
Step 1: Select User - Enter the CCO ID or email address of the user that you want to associate to your company, and click "Next".

Step 2: Select Company - Select the company location from the list of existing locations, or search for a specific location, and click "Next".

Step 3: Confirmation - Verify the details of the selection and click "Finish". The user will automatically receive an email confirmation that their Cisco User ID has been associated to your company.

If you want to immediately assign access roles to this newly-associated user, answer "Yes" to the pop-up.





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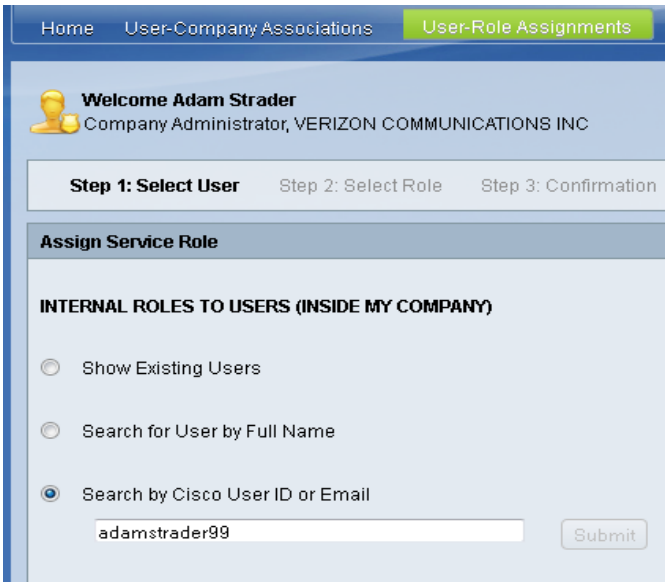
Assigning User Roles

To associate a single user to your company, use the top menu to navigate to “User-Role Assignment” select “Assign Roles to Users. ”Step 1: Select User



Choose an option to Display a list of all existing associated users;

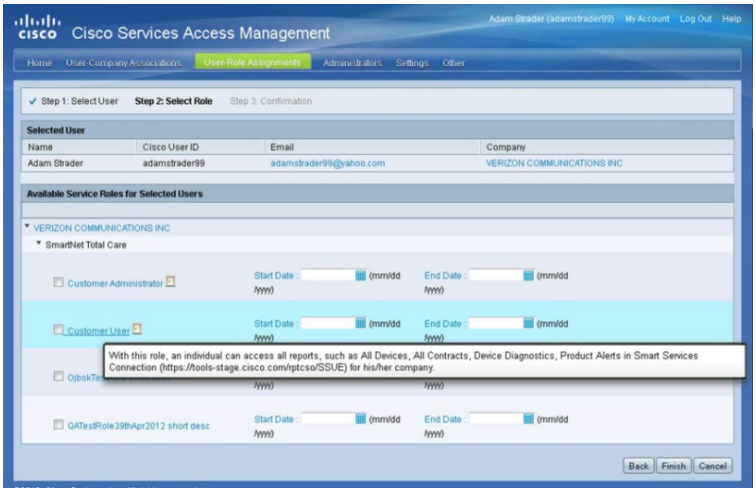
- Search for a user by name; or
- Search for a user by CCO ID or email address

Click “Next”.

Step 2: Select Role

Each available role is grouped by business service and by the authorized company location.

Click on the ▶ next to the Company Name to display the list of business services. Click on the ▶ next to each business service to display the list of available user roles. Hover your mouse over a role to display a more detailed description of the role and its capabilities.



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Batch Upload

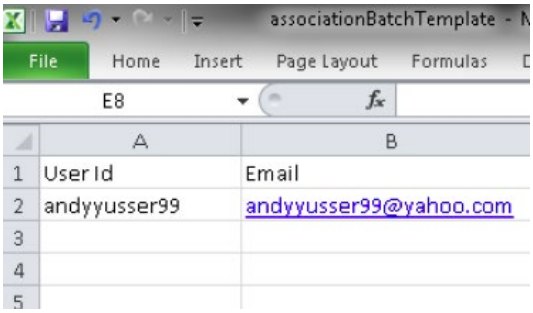
Association, Assignment & Nomination

Instead of performing User-to-Company associations individually, you can associate multiple users through a batch upload, using a provided spreadsheet template. This feature may be especially useful to on-board or migrate users from another system or user repository.
Similarly, instead of performing User-to-Role assignment individually, you can associate multiple users to multiple roles through a batch upload, or nominate multiple users to become additional Delegated Administrators for your company, using provided spreadsheet templates.
Users will be notified via email of the results of the batch upload. Please note: Once submitted, it may take up to 15 minutes for the batch upload to process.

Performing User-to-Company Association via Batch Upload

Use the top menus to navigate to "User-Company Associations" and select "Batch Upload". Select the company location to which you want the list of users to be associated. You will need to initially download the template for batch upload. Save this file as "**associationBatchTemplate.csv**". Edit the file to add the User IDs and email addresses of the users to be associated to your company, and save the file. Click "Browse" to locate and upload the saved file, and then click on "Submit".

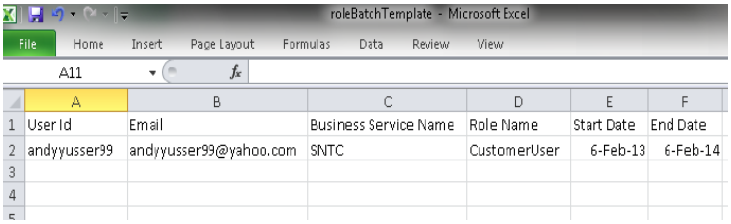
Data Format for Template



Performing User-to-Role Assignment via Batch Upload

Use the top menus to navigate to "User-Role Assignments" and select "Batch Upload". You will need to initially download the template for batch upload. Save this file as "roleBatchTemplate.csv". Edit the file to add the users' role assignments, and save the file. Click "Browse" to locate and upload the saved file, and then click on "Submit".

Data Format for Template



Nominating Multiple Additional Delegated Administrators via Batch Upload

Data Format for Template

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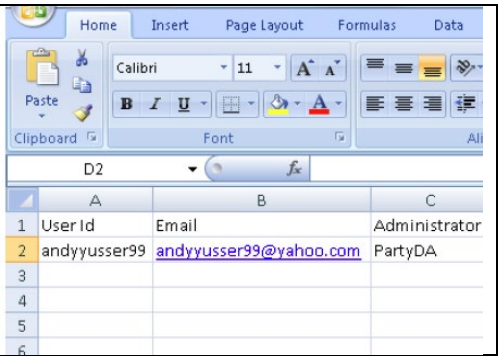
Use the top menus to navigate to “Administrators” and select “Batch Upload”. Select the company location for which you want the list of users to be nominated to administer. You will need to initially download the template for batch upload. Save this file as “**adminBatchTemplate.csv**”. Edit the file to add the User IDs, email addresses, and administrator types of the users that you want to nominate as Delegated Administrators and save the file. Click “Browse” to locate and upload the saved file, and then click on “Submit”.



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Cisco Services Access Management
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Edit User Access

Changing an Existing User's Company Association and/or Role Assignments

If your company has established decentralized, location-based administration, you can change an existing user's company association to reflect a physical move within the company. If the user has left your company, you should "Remove User Access" instead.

A Delegated Administrator can also change an existing user's role assignments, either to reflect a change in their job responsibilities or to grant access to new services.

The user will receive email notification of the changes made to their account.

All Delegated Administrators for your company will also be notified (based on their notification preferences) of the changes made.

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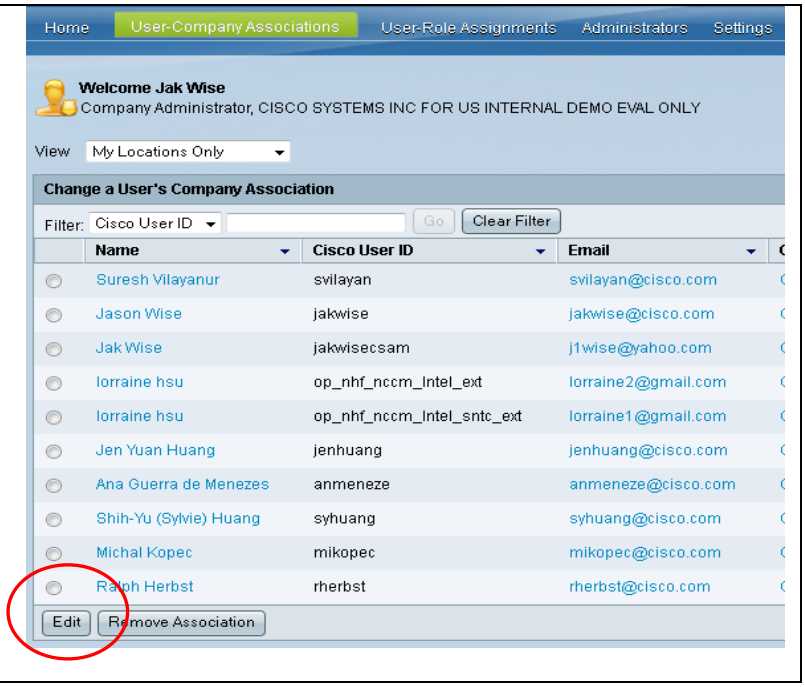
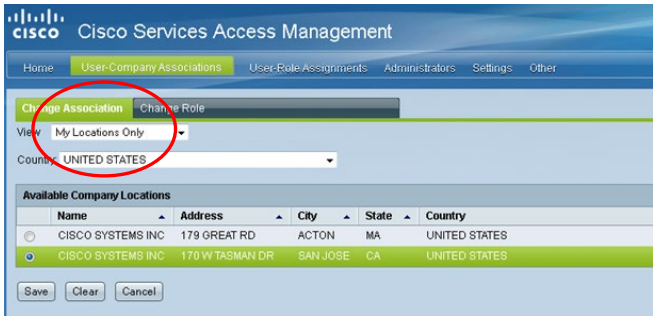
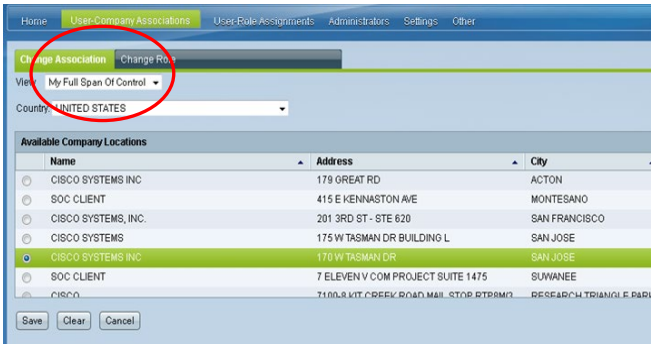
Changing a User's Company Association

Use the top menus to go to "User-Company Associations" and select "Change a User's Company Association". Select the user and click on "Edit". In the next screen, change the View option to "My Full Span of Control" to list all available locations. Select the user's new location, and click "Save".

Click on "Edit" to change the selected user's company association. By default, the company location with which this user is associated will be selected. You will be able to select a different company location by selecting "My Full Span of Control" to view all available company locations.







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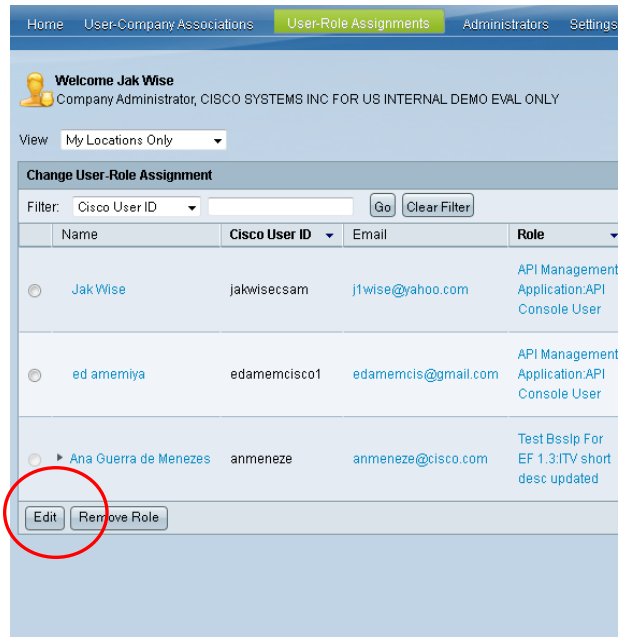
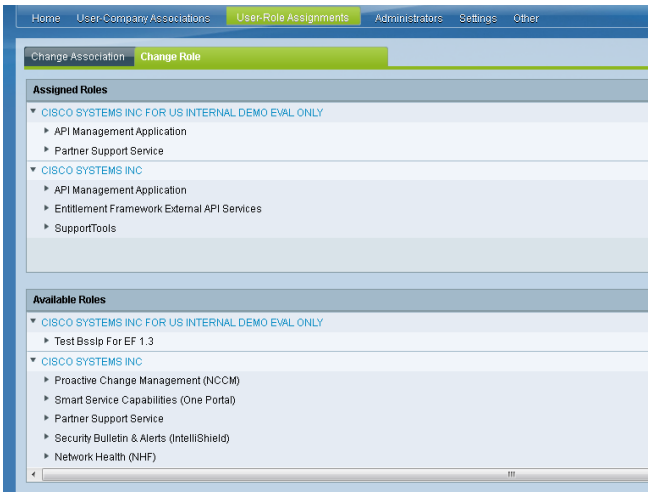
Changing a User's Role Assignments

Use the top menus to navigate to "User-Role Assignments" and select "Change a User's Role Assignments". Click the ▶ next to the user's name to expand their list of existing user role assignments. To remove a single user role assignment, use the radio button to select the role and click "Remove Role". To assign an additional role or change an existing assignment for a specific user, select any of the user's existing roles and click "Edit".

Use the radio button to select the user role assignment you want to modify, then click the "**Edit**" button.



On the subsequent screen, click the ▶ to expand the categorized lists, of the selected user's current Assigned Roles and additional Available Roles.



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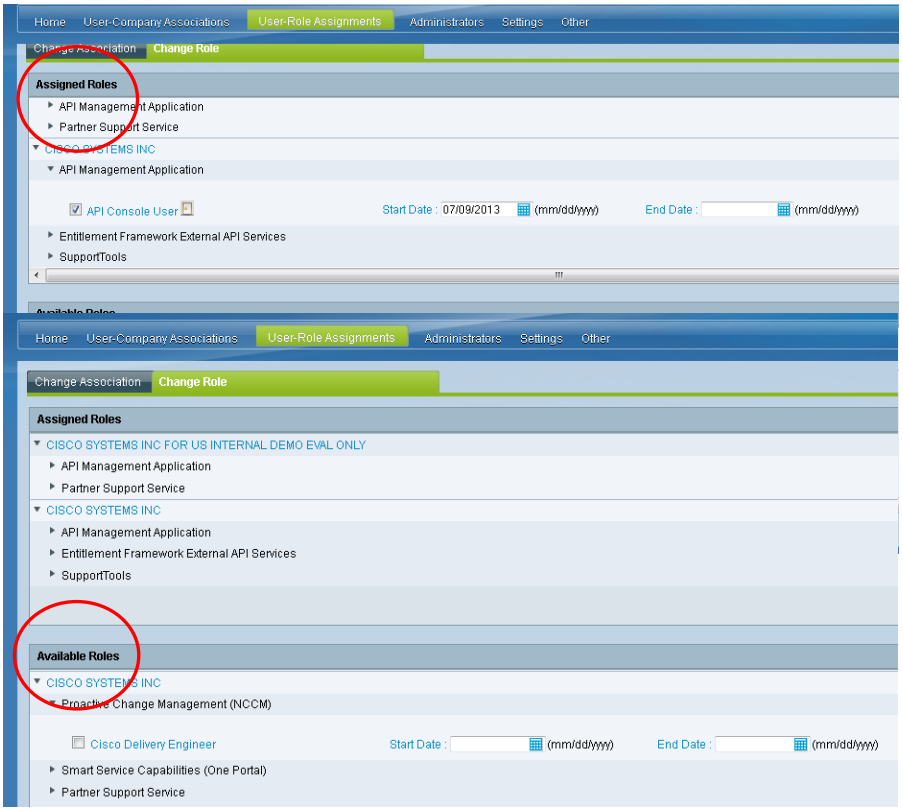
To change the start or end date of a user's current Assigned Role, enter the new date value in the corresponding field. If the Start Date is left blank, the role assignment is immediately active. If the End Date is left blank, the role assignment will remain active until the role is manually removed (or until your organization is no longer entitled to the corresponding service).
To assign one or more of the Available Roles to the user, check the box next to the role, and (optionally) enter the start/end dates.
Click "Save".



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Remove User Access

Disassociate a User from your Company or Inactivate Role Assignments

You can disassociate an existing user who has left your company and no longer requires access to any Cisco Services on behalf of your company.
You can remove a user's individual role assignments, to reflect a change in their job responsibilities.
The user will receive email notification of the changes made to their account.
All Delegated Administrators for your company will also be notified (based on their notification preferences) of the changes made.

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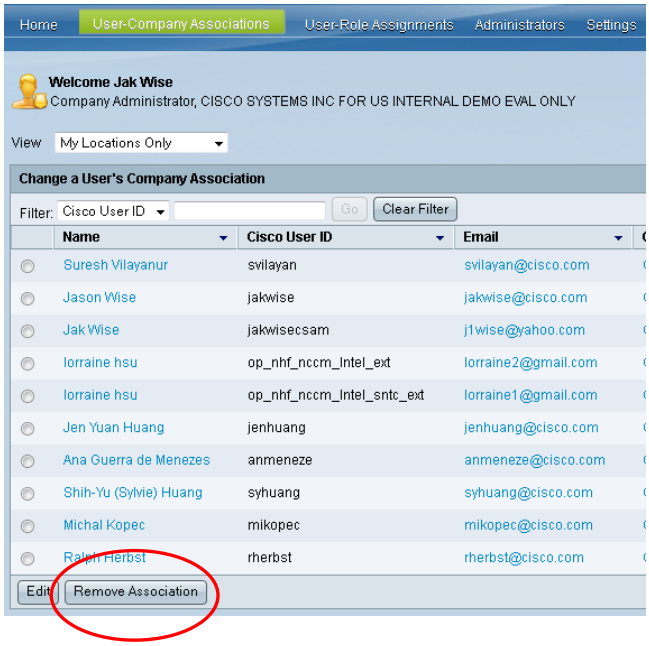
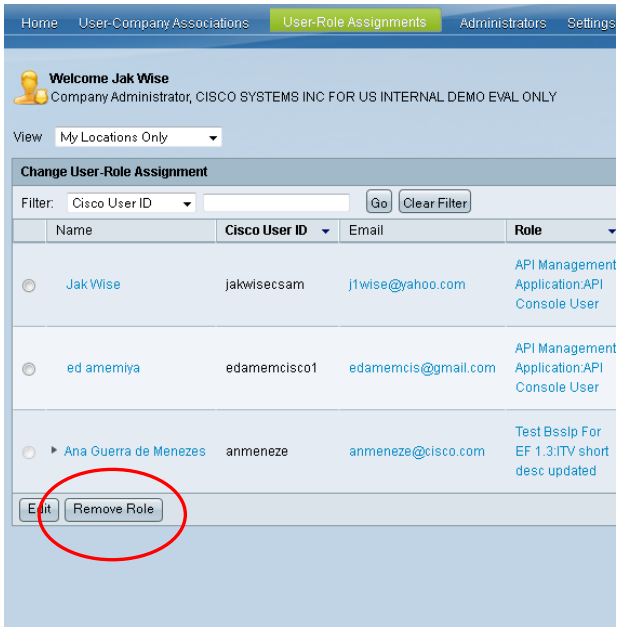
Removing User-to-Company Associations	Removing User-to-Role Assignments
Use the top menus to go to “User-Company Associations” and select “Change a User’s Company Association”. Select the user by clicking on the radio button and click on “Remove Association”. Removing the user’s association to your company will automatically inactivate all role assignments they received from your company.	Use the top menus to navigate to “User-Role Assignments” and select “Change a User’s Role Assignments”. Click the ▶ next to the user’s name to expand their list of existing role assignments. Select the role to be removed and click “Remove Role”.
Click on “**Remove Association”** to disassociate a user from your company. This will also result in the inactivation of roles assigned to that user. 	Use the radio button to select the user role assignment you want to modify. You can use the “**Remove Role**” button to quickly inactivate the selected user role assignment. 

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