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Contents

Welcome to Cisco S	Services Access Management	4
Browsers Suppor	rted by Cisco Services Access Management	4
Overview		5
Cisco Services Ac	ccess Management	5
Benefits of using	Cisco Services Access Management	5
Introduction to Dele	egated Administration	6
Default Administ	ration Process Flow	6
User Self-associa	tion Process Flow	7
Nomination of a	Delegated Administrator	7
Acceptance of De	elegated Administrator Nomination during First Login	8
Establish Company	and Administrator Settings	14
Company Associa	ation Settings	15
Administrator No	otification Settings	15
Set Up Company	Association Rules	15
Set Up Notificatio	on Preferences	20
View Notificati	ions to Users	21
User-Company Asso	ociation and Management	22
User Company Se	elf-Association	22
Manage User Red	quests for Company Association	26
User Company As	ssociation using Cisco Services Access Management	27
Perform User-	Company Association via Batch Upload	29
Revalidate User A	Association Requests	33
View Existing Use	ers Associated with the Company	34
Change Existing U	User-Company Associations	34
Edit User Com	pany Association	35
Remove a Use	r-Company Association	35
User Role Assignme	ent and Management	36
User Role Access	Request using Profile Manager	
Manage User Rol	le Assignment Requests	
Assign User Roles	s using Cisco Services Access Management	

cisco		EDCS-12712547	Cisco Services Access Management User Guide
Intern	al Roles to Users Inside the Com	pany	
Exterr	al Roles to Users and Administra	ators	
Perform	User-Role Assignment via Batch	Upload	
View or	Edit Existing User Role Assignme	nts	
Remo	/e Role		
Add, F	emove, or Change Role Assignm	nent Dates	
View or	Edit Existing External User's Role	e Assignments	
Delegated	Administration		
Assign A	dditional Roles to a Delegated A	dministrator	
View Exi	sting Delegated Administrators.		
Remove	Existing Delegated Administratc	or	
Nominat	e Additional Delegated Adminis	trators	
Comp	any Administrator		
Role A	dministrator		
Nominat	e Multiple Additional Delegated	Administrators using I	Batch Upload55
Other Men	u Option		
Service A	ccess Management Tool		
Web Ser	vices		
Enable C	isco Services Programs for your	Company	
Review A	greements		
Appendix A	: Frequently Asked Questions		
Appendix E	: Function-Based and Menu-Ba	sed Quick Reference	
Welcom	e to Cisco Services Access Mana	gement	
Getting	itarted		
Onboard	ing a User		
Batch Up	lload		
Edit Use	Access		
Remove	User Access		

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

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.

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



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 <u>Smart Net Total Care self-registration process</u>. 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 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.

cisco	
Dear Val:	
Your Cisco Account is now associated to the fol	lowing location:
PENWOOD PAPERS US	
You may now go to the <u>Cisco Profile Manager</u> at Cisco Account via the Additional Access tab.	nd request roles to upgrade access to your
If you have any questions about this change to y Services Access Management Helpdesk for furt	our Cisco Account, please contact the Cisco her assistance:
service access management support@cisco	.com
320431811	
Privacy Statement	Read more about our privacy statement.
Copyright (C) 2011, 2018, Cisco Systems, Inc. All rights are registered trademarks of Cisco Systems, Inc. and/or countries. Cisco Systems, Inc. 170 West Tasman Drive, San Jose,	s reserved. Cisco, the Cisco logo, and Cisco Systems its affiliates in the United States and certain other California 95134

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.

uluilu cisco								
Dear Val:								
You have been nominated to become a Services E location:	Delegated Administrator for the following							
PENWOOD PAPERS 714 RUNNING CEDAR TRL DURHAM, NC 27712 US								
As a Delegated Administrator for your company, yo Management to associate valid users to your com to protected Cisco Services that are available to yo	ou can use Cisco Services Access pany and assign them roles to gain access our company.							
In order to complete this nomination, please click Management. On successful login, you will be pre Management Agreement which will need to be rev	on the link to login to Cisco Services Access sented with the Cisco Services Access iewed 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 please contact the Cisco Services Access Manage assistance:	any questions about this nomination, ement Helpdesk via the email link for further							
service access management support@cisco.co	m							
Privacy Statement	Read more about our privacy statement.							
Copyright (C) 2011, 2018, Cisco Systems, Inc. All rights rese registered trademarks of Cisco Systems, Inc. and/or its affilie Cisco Systems, Inc. 170 West Tasman Drive, San Jose, Cal	erved. Cisco, the Cisco logo, and Cisco Systems are ates in the United States and certain other countries. ifornia 95134							

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.

isco Cisco Servi	ces Access Managem	ent	
Pending Legal Agreement	[9	
Welcome to CSAM Val Hollar	nd !		
The Cisco Services Access Ma	nagement application requires that you a	accept the legal terms and agreements	
Please click on the "Review Leg - Review the legal agree	al Agreement" link below to: nent		
- Accept or decline the a	greement once reviewed		
Once you have accepted the Le	egal Agreement, you will have access to	Cisco Services Access Management application.	
Entitled Company	Administrator Type	Action	

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.

1	Review Legal Agreement	
	Step 1: Read/download the agreement	
	Download Agreement as PDF	
	The first time that a Service Access Management Delegated Administrator accesses Cisco Service Access Management, an agreement must be accepted. Below are the Terms & Conditions that must be accepted before a Delegated Administrator is able to utilize Cisco Service Access Management. You cannot accept the agreement here. The acceptance must be done the first time that you log in to Cisco Service Access Management.	^
	YOU MUST READ CAREFULLY AND ACCEPT ALL OF THE TERMS AND CONDITIONS CONTAINED IN THIS CISCO SERVICE ACCESS MANAGEMENT ("SAM") DELEGATED ADMINISTRATOR AGREEMENT ("AGREEMENT") BEFORE YOU MAY ACCESS OR USE SAM.	
	IF YOU DO AGREE TO ALL OF THE TERMS AND CONDITIONS, YOU SHOULD SIGN THIS AGREEMENT. IF YOU DO NOT AGREE TO ALL OF THE TERMS AND CONDITIONS, YOU SHOULD NOT SIGN THIS AGREEMENT.	
	BY SIGNING THE DOCUMENT, YOU ARE BINDING YOURSELF AND THE BUSINESS ENTITY THAT YOU REPRESENT (COLLECTIVELY, "CUSTOMER") TO THIS AGREEMENT WITH CISCO SYSTEMS, INC. (OR ITS SUBSIDIARY OR AFFILIATE THAT PROVIDES YOU ACCESS TO SAM) ("CISCO"). YOU FURTHER CERTIFY TO CISCO THAT YOU ARE AUTHORIZED TO ENTER INTO THIS AGREEMENT ON BEHALF OF CUSTOMER. IF YOU DO NOT AGREE TO ALL OF THE TERMS OF THE AGREEMENT, THEN CISCO IS UNWILLING TO GRANT YOU ACCESS TO OR USE OF SAM; AND YOU MAY CONTACT YOUR CISCO REPRESENTATIVE TO DISCUSS ALTERNATIVE METHODS TO RESTRICT ACCESS TO CISCO SERVICES ON BEHALF OF CUSTOMER.	
	All capitalized terms have the meanings assigned to them in the Glossary (Exhibit A), incorporated into this Agreement. This Agreement becomes effective when you sign this document.	
	The general purposes of this Agreement are to:	
	Help Customer, through its SAM Administrator(s), manage entitlement to Cisco support under Customer's service agreements. Eachle SAM Administrator(s) to verific, approve, reject, and make associations between individual Cisco com Profiles and the Customer and to assign Step 2: Accept or decline the agreement	~
	After the clicking the "Next," you will have 15 minutes to enter an electronic signature.	

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.





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.

Adopt Your Signature	
Confirm your name, initials, and signature.	
* Required	
Full Name*	Initials*
valholland@penwoodpapers.com	v
SELECT STYLE DRAW	
PREVIEW	Change Style
DocuSigned by:	
valholland@penwoodpapers.com	
By selecting Adopt and Sign, I agree that the signature and initials will be the el my agent) use them on documents, including legally binding contracts - just the	ectronic representation of my signature and initials for all purposes when I (or same as a pen-and-paper signature or initial.
ADOPT AND SIGN CANCEL	

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.



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.



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.

PENWOOD PAPI 714 RUNNING CI DURHAM, NC 27 US * = Company hea s a Delegated Adminis	ERS * EDAR TRL 7712 adquarters strator, you will be able to man	nage access	to the fo	llowing locations:	
Company	Address	City	State	Country	
	714 DUNNING CEDAD TO	DUDHAM	NC	115	

The new Delegated Administrator clicks "OK" to complete the agreement and log-in to the <u>Cisco Services</u> <u>Access Management</u> 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.

cisco Cisco Services Access	Management	Val Holland (ValHolland2113) My Account Log Out Help
Home User-Company Associations User-R	tole Assignments Administrators Settings Other	
Welcome Val Holland Company Administrator, PENWOOD PAPERS		
John Logan San Jose, CA Phone: 555:5555 Email: john@cisco.com		
Associate User to My Company Identify employees who work for my company.	Assign Roles to Users Grant access to services, for individuals that are internal or external to my company.	Web Service Administration Register and manage web service information for your company.
©2018, Cisco Systems, Inc. All rights reserved.		Cisco Confidentia

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:

- 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 \rightarrow Change Company Association Rules". Initially, there will be no records of any association rules set up for the company.

Cisco Services Access Management	2113) My Account	Log Out	Help
Home User-Company Associations User-Role Assignments Administrators Settings Other			
Company Administrator, PENWOOD PAPERS			^
No company settings have been created yet			
Change Company Association Rules		The second se	
View:	My Locations Only	~	
Company Company Passcode 🔹 Email Domain 🔹 Auto Approval 🔹 Modified By 👻	Expiration Date	•	
No Records Found			
Create Edit Remove			
User Association Preference			
Allow users to associate to: (e) Any valid company location Only enable locations with active settings (e.g. company administrators and passcodes)			
Save			
©2018, Cisco Systems, Inc. All rights reserved.	C	isco Confid	lential

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".

uhuh cisco	Cisco Services	Access Manager	hent					My Account	Log Out	Help
Hom	User-Company Associatio	ns User-Role Assignments	Administrators	Settings	Other					
	Velcome Val Holland ompany Administrator, PENWOOD	PAPERS								
Step #	1: Manage Location Options									
• Sel	ect Specific Locations									
	Company	Address	City		State	Country	Passcode	Sett	ings	
	PENWOOD PAPERS	714 RUNNING CEDAR TRL	DUF	RHAM	NC	UNITED STATES	No Passcode	0		
O Sea	arch for a Specific Location									
								Ne	ext Cano	:el
©2018, Cis	sco Systems, Inc. All rights reserv	ved.						Cis	co Confid	lential

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

cisco	Cisco Services Access M	/lanag	ement		Val Holland (ValHolland2113)	My Account	Log Out	Help
Hom	User-Company Associations User-Role	Assignme	nts Administrators Settings	Other				
Step #	2:Company Association Settings							
User S	elf-Association Options							
Email D)omain							
Valid e	mail domain required ?	• Yes	ONO					
Compa	iny Address							
Users	allowed to associate with matching address ?	• Yes	○ No					
Assoc	iation Approval Options							
OAut	tomatic Approval - Email & Passcode							
	iomatic Approval - Passcode Only							
● Mar	nual approval required for all requests							
						Back	Vext Can	cel
©2018, Cis	sco Systems, Inc. All rights reserved.					C	isco Confic	tential

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.

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.

				Val Holland (ValHolland2113)	My Account	Log Out	He
cisco Cisco Services Access Management							
Home User-Company Associations User-Role Assignments Admini	ators Settin	gs O	Other				
Settings Detail							
Generate Passcode							
Generate a new code							
0							
Select Existing Company Passcode within My Span of Control							
0							_
Company							_
	NO RECOR	as rou	una				
Approved Company Email Domains (Email Format: @company.com)							
Email Domain: Add Line							
Example: @cisco.com							
					90 - 200 F	2002	
					Back	inish Can	cel
018, Cisco Systems, Inc. All rights reserved.					(Cisco Confi	den

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.

cisco	Cisco Services	s Access Man	agement			My Account Log Out	Help
Home	User-Company Associations	s User-Role Assignme	nts Administrators S	ettings Other			
Wel Com	come Val Holland Ipany Administrator, PENWO	OD PAPERS					
Se	ettings have been create	ed successfully					
Change	Company Association Ru	ules					
					View:	My Locations Only	<u> </u>
	Company -	Company Passcode	Email Domain	Auto Approval	Modified By 🔹	Expiration Date	-
0	PENWOOD PAPERS	F K	@penwoodpapers.com	Yes(Email Domain and Passcode)	Val Holland	08-Apr-2019, 06:47 PM	
0	Create Edit Remove)					
User As	sociation Preference						
Allow us	sers to associate to:) Any valid company location e	n O Only enable locati	ons with active settings (e.g.	company administrators and passcod	les)		
©2018, Cisco	o Systems, Inc. All rights res	erved.				Cisco Confi	identia

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.



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 \rightarrow Change Notification Preferences".

ılıılı cısco	Cisco Services	Access Manage	ement	al Holland (Vall	Holland2113)	My Account	Log Out	Help
Home	User-Company Associations	User-Role Assignments	Administrators	Settings	Other			
	elcome Val Holland ompany Administrator, PENWOOD) PAPERS						
Notific	ation Settings							
Allow F	Requestors to see your Delegate es ONo ate email notification and alert? es (For Every User Submission)	d Administrator contact info	Ormation?					
View M	Notifications to Users							
Display	y messages in which langua	ge?					_	
US Eng	glish 🗸							
Compa	ny Association e-mail notification	IS						
Appr	oval Message Denial Message	9						
User R	ole e-mail notifications							
Appr	oval Message Denial Message							
2018, Cis	co Systems, Inc. All righ <u>ts rese</u> r	ved.				c	isco Confi	lentia

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".

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.

	Learn more about this new login experience	
Profile	e Management Personal Security Settings Access Management would you like to do next?	Contact Suppor
0	Ordering Order services directly through our global network of certified partners. Go to Ordering)
(Customer Associate your account with a contract number or bill-to ID. Go to Customer Portal)
	Partner Associate your account with a partner company or register your company as a partner. Go to Partner Self Service)
	Supply Chain Access Supply Chain tools and resources. Go to Supply Chain Portal)

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.

Icome to Cisco isco Account Pre- iack to Profile Management	ofile		6	Choose La		
isco Account Pro	ofile		ß	Choose La		
lack to Profile Management				Choose La		
				0000000		
				CHOUSE La	nguage : Engli	sh ~
cess						
ices & Support Ordering Sm	art Services	Partners PICA	Lisers			
ices & support ordening Sin			03613			
ou need additional access to ser	vices and support? As	sociate your Ci	sco Account with your o	ompany service c	ontracts, Bill-to ID	s, or product serial numbers
ither full support or downloads or	nly access.					
d Access						
Your Current Access	Access Requests					
						and Annual factors From
		Not	shown: Contracts with	downloads only a	ccess O	ther Companies
ontract Number 🕖	Bill-to ID	0	\$	Administrators	F	or Access Issues
Find Access -	- Find A	ccess -				Email
			-			
	No data	a available in ta	ble		Y	our Current Access
owing 0 to 0 of 0 entries						

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

						Worldwide [change]	Account Log Out	
CISCO	Products & Services	Support	How to Buy	Training & Events	Partners	Employees		Q
Welcome to Cis	ic0							
Cisco A	ccount Profi	le						
- Back to Pro	file Management							Help
					Choose	Language : English		~
Company Ass	ociation Access							
Associate your (Cisco Account by providing	g your company	passcode if know	'n.				
Company Emai	I Domain		@penw	oodpapers.com C.	id email domains	include @xxxxx.com,	@xxxxx.net, @xxxxx.org, e	ət
Company Pass	code							
lf you do not kno	w your company passcod	le, you may also	enter your full co	mpany location detail	below.			
Country*			Select		\sim			
Company Name	•*							
Address								
City								
State / Province	3 *							
Postal Code								
* This action release, click th	n will result in displaying p e checkbox. If you do not, p	ersonal informa please press 'C	ation that you are p ancel'.	providing through the f	orm to the selecte	d company's adminis	trator. If you consent to th	nis
*indicates requi	red							
Submit	Cancel							

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

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.

ale de						Worldwide [change]	Account Log Out	My Cisco
cisco	Products & Services	Support	How to Buy	Training & Events	Partners	Employees		୍
Welcome to Cis	co							
Cisco A	ccount Profil	е						
- Back to Pro	file Management				Choose	e Language : English		Help ~
Access Services & Sup	port Ordering Smart Se	rvices CCIE	Partners PICA	Users				
Existing Com	pany Association							
Company Nar	me					Status	Action	
PENWOOD PAP	PERS	Contact C	ompany Adminis	trator		Approved	<u>Remove</u>	
Service Access I	Roles							
My Roles								
Business Servi	ice	Role	Description	C	ompany	Status	Action	
No Active Role	S							
Contacts # Fee	edback Help Site Map Terr	ms & Conditions	Privacy Statement	Cookie Policy Tradem	arks			

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

ahaha	Products & Services	Support	How to Buy	Training & Events	Partners	Worldwide [change] Employees	Account	Log Out	My Cisco
Welcome to Cis	 ccount Profil	e							
Back to Prof Access	ile Management				Choose	Language : English			Help ~
Services & Supp	ort Ordering Smart Sen You have successfully sub	vices CCIE pmitted a comp	Partners PICA U pany association r	Jsers request.					
Existing Comp	any Association								
Company Nan	ne					Status	Action	ı	
PENWOOD PAP	ERS	Contact (Company Adminis	strator		Pending	Remo	<u>ve</u>	



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.

Existing Company Associat	Delegated Adm	ninistrator Contact Information	1		х
Company Name	Name	Company	Phone	Email	-
PENWOOD PAPERS	Val Holland	PENWOOD PAPERS		valholland@penwoodpapers.com	
Service Access Roles					
My Roles					
Business Service					
No Active Roles	-				

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.

alulu cisco							
Dear Don:							
Your request to be associated with the following location has been approved:							
PENWOOD PAPERS US							
You may now go to the <u>Cisco Profile Manager</u> 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							
320431811							
Privacy_Statement Read more about our privacy statement.							
Copyright (C) 2011, Cisco Systems, Inc. All rights reserved. Cisco, the Cisco logo, and Cisco Systems are registered trademarks of Cisco Systems, Inc. and/or its affiliates in the United States and certain other countries. Cisco Systems, Inc. 170 West Tasman Drive, San Jose, California 95134							

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 \rightarrow Pending User Association Requests".

A list of pending requests is displayed.

cisco	Cisco Services A	ccess Managem	ent	1	/al Holland (ValH			.og Out	Help
Home		User-Role Assignments	Administrators	Settings	Other				
View M Pending	come Val Holland Ipany Administrator, PENWOOD P4 y Full Span Of Control 🔍 User Association Requests	APERS					10 v per	r page G	6
Filter: Cis	sco User ID 🗸	Go Clear Filte	r						
Na Na	ame 🔺 Cisco User ID 🔺	Email	 Job Title 	- Com	pany 🔺	Status 🔺	Received	(2)	•
	on Ah DonAh85498657	donah@penwoodpapers.co	om	PENV	VOOD PAPERS	Pending	16-Oct-2018,	06:15 PN	1
Approve	Deny							1	

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.



Name	Company to Associated With	
Don Ah	PENWOOD PAPERS	

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 <u>Nomination of Additional Delegated Administrators</u> 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 \rightarrow Associate User to My Company".

NOTE: Refer to the <u>Perform User-Company Association via Batch Upload</u> 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".

cisco	Cisco Services A	ccess Managem	nent	Val H	olland (ValHolland2113)	My Account	Log Out	Help
Home	User-Company Associations	User-Role Assignments	Administrators	Settings	Other			
Con	Icome Val Holland npany Administrator, PENWOOD PA	PERS						
Step	1: Select User Step 2: Select	Company Step 3: Confi	rmation					
Select U	Iser for Company Association							
Search b	by Cisco User ID or Email							
DonAh85	5498657							
						Back	Next Can	cel
©2018, Cisc	o Systems, Inc. All rights reserved					C	isco Confi	lential

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.

luilu isco Cis	sco Servio	ces Access Ma	inageme	ent	Val Hollan	d (ValHolland2113)	My Account	Log Out	Help
Home Use	-Company Assoc	iations User-Role As	ssignments	Administrator	s Settings	Other			
✓ Step 1: Sele	ct User Step	2: Select Company	Step 3: Confirm	nation					
Selected User									
Name	Cisco U	ser ID		Email					
Don Ah	DonAha	35498657		donah@pen	woodpapers.co	om			_
View	My Locations O	nly 🗸							
Country	UNITED STATES	3		~					
Cor	npany	Address	City	State	Country				
O PEN	WOOD PAPERS	714 RUNNING CEDAR T							
O Search for	a Specific Locati	ion							
							Back	inish Can	cel
018, Cisco Syste	ms, Inc. All rights	reserved.					C	Cisco Confi	denti

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

Search for a Comp	any	
Select a specific co	ompany location to manage access.	
O Display Compan	y Locations Available	
Search for a Sp	ecific Location	
Country	select one V	
Company		
Address1		
Address2		
City		
 State 	select one 🗸	
Postal		
indicates require	ed	
Search		
		Back Finish Cancel

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

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.

sco	Cisco Services A	ccess Managerr	nent	Val Hollan	d (ValHolland2113)	Log Out	
lome	User-Company Associations	User-Role Assignments	Administrators	Settings	Other		
 Step 1 Confirmation Please ref 	: Select User 🗸 Step 2: Select (ation	Company Step 3: Confir	mation	-	-		
Selecte	d Associations						
Selecte Name	d Associations	pany to Associated With					

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 \rightarrow Batch Upload".

iliulu cisco Cisc	o Services Ac	cess Managen	Val Hol	lland (ValHol	lland2113)		Log Out	Hel
Home User-C	ompany Associations	User-Role Assignments	Administrators	Settinos	Other			
		oser-noie Assignments	Administrators	ootungo	otilei	and the second s		
Welcome Va Company Adr	II Holland ninistrator, PENWOOD PAI	PERS						
Step 1: Select Pa	rty Location							
 Country 	select one		~					
Company								
Address1								
Address2								
City								
 State 	select one 🧹							
Postal								
 indicates requ 	uired							
Search								
Step 2: Provide U	Isers for Company As	sociation						
Below is a sample	of CSV template to be up	oaded. For each user, you	may provide eithe	r their Cisco	User ID or	email address.		
	Cisco User ID	* or	Ema	a				
	ValHolland2113		V	 alholland@p	enwoodpa	pers.com		
Step 3: Upload Ba	atch Associations							
use extreme cautio	on when using this featur	e. If you have never used t	nis reature, reviev	v the help gi	lide.			
Upload a CSV spre	eadsheet from your comp	iter						
Browse No fi	le selected.	wnload Template						
	_							
Check the chec	k box, if you don't want to	send the email notification	is to the respective	e recepients				
Submit								
018 Cinco Svotom	s Inc. All rights reserved					(cisco Confi	dent

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.

	Cisco	Serv	vices Ac	cess Man	adem	ent	val Hol	land (ValHo	lland2113)		Log Out	Help
Home	User-Con	nnany As	sociations	liser Pole Assi	naments	Administr	ators	Settinos	Other			
monio					gimento	Administr	21013	oouingo	outer			
Cor	Icome Val I mpany Admir	Holland histrator, P	ENWOOD PA	PERS								
Step 1:	Select Part	y Locatio	on									
* Cou	intry	UNITED	STATES			~]					
× Con	npany	Penwood	d Papers									
Add	dress1											
Add	dress2											
City	(
* Stat	te	NORTH	CAROLINA	~								
Pos	stal											
• indi	icates requin	ed										
Searc	<u>_n</u>											
	Company		Address		City	State	Coun	try				
•	PENWOOD I	PAPERS	714 RUNNIN	G CEDAR TRL								
		11.6171 146	 332 	142.04.07								
Step 2:	Provide Us	ers for C	company As	sociation								
Below is	s a sample of	r CSV tem	plate to be up	loaded. For each	user, you n	nay provid	e eithei	r their Cisco	User ID or	email address.		
		Cis	co User ID	* 0	or		Ema	il				
		Val	Holland2113				Va	alholland@p	enwoodpa	pers.com		
Step 3:	Upload Bate	ch Assoc	ations									
Use extr	reme caution	when usi	ing this featur	e. If you have nev	ver used th	is feature,	review	v the help g	uide.			
Upload a	a CSV spread	dsheet fro	om your comp	uter								
Brows	e No file	selected	6	ownload Template	a l							
			Ľ									
Chec	k the check	box, if you	u don't want f	o send the email r	notifications	to the res	pective	e recepients	i.			
Submit												
02018 Cisc	o Systems I	ne All rig	hts reserved							(lisco Confi	dential

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.

	8	5	ç	÷		associationBatchTemp	late - Excel
	File	Home	Insert	Page La	yout Fo	ormulas Data Review	View│♀T
C	LO	•	1	× v	f_{x}		
		А				В	с
1	User lo	b		Email			
2	DonAł	185498	657	donah@	penwo	odpapers.com	
3	Adam	Strader	r	adamstr	ader@	penwoodpapers.com	
4	Juanal	Etherid	ge315	juanaet	n@pen	woodpapers.com	

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.

cisco	
Dear Don:	
Your Cisco Account is now associated to the	following location:
PENWOOD PAPERS US	
You may now go to the <u>Cisco Profile Manage</u> Cisco Account via the Additional Access tab.	r and request roles to upgrade access to your
If you have any questions about this change t <u>Contact Delegated Administrator</u>	to your Cisco Account, please click the link :
320431811	
Privacy Statement	Read more about our privacy statement.
Copyright (C) 2011, 2018, Cisco Systems, Inc. All rig are registered trademarks of Cisco Systems, Inc. and countries. Cisco Systems, Inc. 170 West Tasman Drive, San Jo	ghts reserved. Cisco, the Cisco logo, and Cisco Systems //or its affiliates in the United States and certain other ose, California 95134

The Delegated Administrator can view the successfully uploaded users from "User-Company Associations \rightarrow View Existing Users".

uluilu cisco	Cisco Service	es Access Managem	ent		v	al Holland (Vall	Holland2113) My	Accour	it Log Out Help
Home		tions User-Role Assignments	Administrators	Settings O	ther				
	ome Val Holland any Administrator, PENW	OOD PAPERS							
View My	Full Span Of Control 🗸					Viev	v active status only	, 0	View all records
View Exis	ting Associations							10 ~	per page Go
Filter: Cisco	o User ID 🗸	Go Clear Filter							
Name 🚽	Cisco User ID 👻	Email 🗸 🗸	Job Title 👻	Company	-	Status 👻	Last Reviewed	-	Administrator
Don Ah	DonAh85498657	donah@penwoodpapers.com		PENWOOD PA	APERS	Approved	16-Oct-2018, 06:	00 PM	1
Val Holland	ValHolland2113	valholland@penwoodpapers.com		PENWOOD PA	APERS	Approved	09-Oct-2018, 01:	33 PM	1
									1
©2018, Cisco 9	Systems, Inc. All rights re	eserved.							Cisco Confidential

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 \rightarrow Revalidate User Associations".

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

uluilu cisco	Cisco	o Ser	vices Acc	ess Ma	nagem	ient	-						Val Hol	land (ValHolland2113)	My Account	Log Out	Help
Home			ssociations L	ser-Role As	signments	Administrators	Settings	Other									
View M Revalida Filter: Ca	Icome Val I Ipany Admin Iy Locations Ite User As	Holland histrator, Only ssociati	PENWOOD PAPER	S	Clear Filte	r			_		_				10 🗸	per page (Go
Name		-	Cisco User ID		🔺 Emai	I.		Job Title		Company	-	Status	-	Expiration Date			
Do	n Ah		DonAh854986	57	dona	ah@penwoodpa	apers.com	Manager		PENWOOD PAPERS		REVALIDATE		17-Oct-2019			
Send	automatic	email	to notify the sele	cted users	about this	revalidation ac	tion.										
Approve	Deny															1	
©2018, Cisc	o Systems,	inc. All r	ights reserved.													Cisco Confi	idential

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.

cisco C	isco Services	Access Managem	ent				/alHolland2113) My /	Accou	nt Log Out Hel
Home Us		ns User-Role Assignments	Administrators	Settings	Other				
View Existin	e Val Holland Administrator, PENWOO ations Only	DD PAPERS				٥v	'iew active status only	0	View all records
Filter: Cisco U	ser ID 🗸	Go Clear Filter	.)	_					
Name 🚽	Cisco User ID 🔹	Email	 Job Title 	- Con	npany -	Status -	Last Reviewed	-	Administrator
Don Ah	DonAh85498657	donah@penwoodpapers.com		PEN	WOOD PAPERS	Approved	16-Oct-2018, 07:00	РМ	1
Val Holland	ValHolland2113	valholland@penwoodpapers.com	n	PEN	WOOD PAPERS	Approved	09-Oct-2018, 01:33	РМ	1
									1 🕨
2018, Cisco Sys	stems, Inc. All rights rese	erved.							Cisco Confidentia

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 \rightarrow 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".

cisco	Cisco	Services Ad	ccess Manageme	ent		Holland (ValHolland2113)	My Account	Log Out	Help
Home	User-Con	npany Associations	User-Role Assignments	Administrators	Settings Of	her			
View M	Icome Val H npany Admir Ny Locations a User's C	Holland histrator, PENWOOD PA Only	PERS				10 🗸	per page (Go
Filter: Ci	isco User ID	~	Go Clear Filter	J					
N	lame 👻	Cisco User ID 🚽	- Email	- C	ompany	 Last Updated 	👻 Admin	istrator Info	>
•	Ion Ah		donah@penwoodpapers.	com Pl	NWOOD PAPER	5 16-Oct-2018, 07:00	PM		
0 1	/al Holland	ValHolland2113	valholland@penwoodpap	ers.com Pf	NWOOD PAPER	S 09-Oct-2018, 01:33	РМ	1	
Edit R	emove Asso	ciation						1	Þ
©2018, Cisc	o Systems, I	Inc. All rights reserved					(Cisco Confi	dentia

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".

cisco	Cisco Ser	vices Access M	anagem	ent	Val Holland (ValHolland2113)	My Account Log Out	Help
Home	User-Company A	ssociations User-Role /	Assignments	Administrato	rs Settings Other		
Change View M Country: [Availabl	Association Ch ly Locations Only UNITED STATES e Company Locat	iange Role					
N	ame 🔺	Address	City 🔺	State 🔺	Country		
• PI	ENWOOD PAPERS	714 RUNNING CEDAR TRL	DURHAM	NC	UNITED STATES		
Save (Clear Cancel						v
©2018, Cisc	o Systems, Inc. All r	ights reserved.				Cisco Confi	dential

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.

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:

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- 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.

Welcome to Cisco						
Cisco Account	Profile					Help
Back to Profile Manager	nent	Choose Language	English		~	
Access						
Services & Support Ordering	Smart Services CCIE P	artners PICA Users				
Existing Company Associa	ation					
Company Name	Status Action					
PENWOOD PAPERS	Contact Con	npany Administrator	Appro	Approved Ren		
Service Access Roles						
My Roles						
Business Service	Role	Description	Company	Status	Action	
Smart Net Total Care	Customer Administrat	Users with this role can upload invento ry, manage collectors, access all repor ts and grant or revoke access for their company users in the Smart Net Total Care portal, at https://tools.cisco.com/s martservices.	PENWOOD PAPERS	Active	<u>Remove</u>	^
Smart Net Total Care	Customer User	Users with this role can access most r eports, such as All Devices, All Contra cts, and Product Alerts (except for thos e reports that are exclusively for admini strators) in the Smart Net Total Care p ortal, at https://tools.cisco.com/smarts ervices.	PENWOOD PAPERS	Active	Remove	>
Available Roles						
Business Service Role		Description		Company		
Smart Net Total Care API Developer The API Developer gives you the capability to access PENWOOD PAPE Cisco's API management console. http://apiconsole. cisco.com						< >
Submit Clear						
Contacts H Feedback Help S	Site Map Terms & Conditions F	Privacy Statement Cookie Policy Trademarks	5			
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.

Welcome to Cisco						
Cisco Accour	nt Profile					
- Back to Profile Manag	gement					
			Choose Language	English		~
Access						
Services & Support Orderi	ing Smart Services CCII	E Partners PICA Users				
Your role assignmen	nt request has been submi	tted.				
Existing Company Asso	ciation					
Company Name			Statu	IS	Action	
PENWOOD PAPERS	Contac	t Company Administrator	Appro	ved	Remove	
Service Access Roles						
My Roles						
Business Service	Role	Description	Company	Status	Action	
Smart Net Total Care	API Developer	The API Developer gives you the capab	PENWOOD PAPERS	Pending A		^
		ility to access Cisco's API managemen		pproval	1	
		i console. http://apiconsole.cisco.com				

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 \rightarrow Pending Role Assignment Requests" to view a list of pending user requests for role assignment.

•	ılıılı cısco	Cisco S	Services Acc	ess Manageme	ent				Val Holland (ValHolland2113)	My Account	Log Out	lelp
	Home	User-Company	Associations Us	ser-Role Assignments	Administrators Settin	gs Other						
		elcome Val Holl ompany Administra	and ator, PENWOOD PAPE	RS								
	View [ly Locations Only										
	Pendi	ng Role Assignr	ment Requests							10 🗸 pe	r page Go	9
1	Filter:	Cisco User ID	~	Go Clear	Filter							
	1	lame	Cisco User ID 🔺	Email	Company	-	Role Requested	Received	Start Date	End Date		
		Don Ah	DonAh85498657	donah@penwoodpaper	rs.com PENWOOD PAR	PERS	Smart Net Total Care:API Developer	Thu Oct 18 13:42:49 CDT 2018				
	Approv	ve Deny									1	
0	2018. Cis	co Systems. Inc.	All rights reserved.							Cis	co Confide	ntial

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".



cisco	Cisco Service	s Ac	cess Manag	ement	Val Holla	ind (ValHolland211	3) My Account	Log Out	Help
Home	User-Company Associatio	ıs U		Administrators	Setting	is Other			
View [Welcome Val Holland Company Administrator, PENWOOD PAPERS View My Locations Only The User role(s) have been approved successfully and email sent to the User(s).								
Pendi	ng Role Assignment Requ	ests					10 🗸	per page 🖸	60
Filter:	Cisco User ID 🗸		Go	Clear Filter					
Name	Cisco User ID 🔺	Email	Company 🔺	Role Requested		Received	Start Date	End Date	
			No Pendin	g Requests					
©2018, Cis	sco Systems, Inc. All rights re	served.						Cisco Confid	lential

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 \rightarrow 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".

	User-Company Associations	User-Role Assignments	Administrators	Settings	Other		
We Co	elcome Val Holland mpany Administrator, PENWOOD	PAPERS					
Ste	p 1: Select User Step 2: Sel	ect Role Step 3: Confirmat	ion				
ssign	Service Role						
TERN	AL ROLES TO USERS (INSIDE N	IY COMPANY)					
) Sh	ow Existing Users						
) Se	arch for User by Full Name						
	arch hu Cines User ID as Email						
, se F	anch by cisco user ID or Email		Cuturit				
	011A1103790037		Submit				
-							
	IAL ROLES TO USERS AND AD	MINISTRATORS					
(TERI	IAL ROLES TO USERS AND ADI	MINISTRATORS Company					
(TERI) As	IAL ROLES TO USERS AND ADI	MINISTRATORS Company istrator					
(TERI) As) As	IAL ROLES TO USERS AND ADI asign Role to User Outside of My asign External Role to Role Admin	MINISTRATORS Company istrator					
EXTERN D As D As	IAL ROLES TO USERS AND ADI asign Role to User Outside of My asign External Role to Role Admin	MINISTRATORS Company istrator			(8	ack Next) As	ssign Can

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

cisco Cisco Services Acces	s Managem	Val Holl	and (ValHoll			Log Out	Help
Home User-Company Associations User-Re	ole Assignments	Administrators	Settings (Other			
Welcome Val Holland Company Administrator, PENWOOD PAPERS							
Step 1: Select User Step 2: Select Role	Step 3: Confirmation	in					
Assign Service Role							
INTERNAL ROLES TO USERS (INSIDE MY COMPA Show Existing Users Search for User by Full Name Search by Cisco User ID or Email DonAh85498657	NY)	Submit					
Name Cisco User ID Email		Company	Status	More Inf	ormation		
Don Ah DonAh85498657 donah@pe	nwoodpapers.com	PENWOOD PAPER	S Active	Role	Information		
EXTERNAL ROLES TO USERS AND ADMINISTRAT	ORS						
Assign External Role to Role Administrator		_					
					ack Next As	sign Cano	cel
©2018, Cisco Systems, Inc. All rights reserved.					С	isco Confid	dential

On the "Step 2: Select Role" page, click the bicon next to the Cisco service offering to display the list of available roles.

ılıılı cısco	Cisco Services A	Access Manager	ment	Val Holland ((ValHolland2113)	My Account	Log Out He
Home	User-Company Associations	User-Role Assignments	Administrators	Settings	Other		
🗸 Step	1: Select User Step 2: Select	ct Role Step 3: Confirmat	tion				
Selecte	d User						
Name	Cisco User ID	Email			Company	y	
Don Ah	DonAh85498657	donah@penwoo	dpapers.com		PENWOO	DD PAPERS	
Available PENWO	le Service Roles for Selected DOD PAPERS art Net Total Care	Users					
						Back	sign Cancel
2018, Cisc	co Systems, Inc. All rights reserve	ed.					isco Confident

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

liulu isco C	Cisco Services A	ccess Management	Val Holland (ValHolla	and2113) My Acco	unt Log Out	Help
Home Use	r-Company Associations	User-Role Assignments Adminis	strators Settings Other			
✓ Step 1: Se	elect User Step 2: Select	Role Step 3: Confirmation				
Selected Us	ser					
Name	Cisco User ID	Email		Company		
Don Ah	DonAh85498657	donah@penwoodpapers.c	om	PENWOOD PAPERS		
* PENWOOD * Smart Ne	PAPERS et Total Care ustomer Administrator 🖸	Start Date (OPTIONAL):	End Date (OPTIONAL):	n/dd		
<u> </u>	Istemer User	Start Date (OPTIONAL): (mm/dd /yyyy)	End Date (OPTIONAL):	m/dd		
	Users with this role ca reports that are exclus so Dr. /smartservices.	in access most reports, such as ively for administrators) in the Sm	All Devices, All Contracts, nart Net Total Care portal,	and Product Alerts at https://tools.cisc	(except for the concept for th	nos
		/уууу)	/уууу)			
				Back	Assign	cel
149 Ciana Cu	etems las All rights reserved				Cie co Confi	dan

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.

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

sco C	Cisco Services	Access Managen	Val Ho nent	lland (ValHo	lland2113)	My Account	Log Out	Hel
lome Use	r-Company Associations	User-Role Assignments	Administrators	Settings	Other			
✓ Step 1: Se Role Assign	elect User 🗸 Step 2: Select ment Complete he service roles has been	ct Role Step 3: Confirmat	ion email has been ser	nt to the use	rs	_		
Name	Company	- R	oles Assigned					
Don Ah	PENWOOD P	APERS SI	mart Net Total Care:	Customer L	lser			
18, Cisco Sy	stems, Inc. All rights reserv	/ed.				c	lisco Confic	der

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.

EXTERNAL ROLES TO USER	S AND ADMINISTRATORS	
Assign Role to User Out:	side of My Company	
Search by Cisco User ID ar	nd Email	
Cisco User ID	tjvalley@gmail.com	
* User's Email	tjvalley@gmail.com	Submit

ılıılı cısco

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.

cisco Cisco Service	es Access Mana	gement	Val Hollan	d (ValHolland2113)	My Account	Log Out	Help
Home User-Company Association	ons User-Role Assignme	nts Administrators	Settings	Other			
Welcome Val Holland Company Administrator, PENV	VOOD PAPERS						
Step 1: Select User Step	2: Select Role Step 3: Con	firmation					
Assign Service Role							
INTERNAL ROLES TO USERS (INS	SIDE MY COMPANY)						
O Show Existing Users							. 1
O Search for User by Full Name)						. 1
Search by Cisco User ID or E	mail						. 1
EXTERNAL ROLES TO USERS AN	DADMINISTRATORS						. 1
Assign Role to User Outside of the second	of My Company						. 1
Search by Cisco User ID and En	nail						. 1
Cisco User ID	tjvalley@gmail.com						. 1
* User's Email	tjvalley@gmail.com			Submit			. 1
Name Cisco Us	er ID Email	Company					
Tammy Valley tjvalley@	gmail.com tjvalley@gmail.c	om CISCO SYSTEMS	INC FOR US I	NTERNAL DEMO EV	AL ONLY		
O Assign External Role to Role	Administrator						
				B	adk Next As	sign Can	cel
©2018, Cisco Systems, Inc. All rights r	reserved.				С	isco Confi	dential

Click "Next".

cisco Cisco	o Services Access M	lanagement		Val Holland (ValHolland2113)	My Account	Log Out	Help
Home User-Comp	any Associations User-Role A	ssignments Administrators Settin	ngs Other				
✓ Step 1: Select Us	ser Step 2: Select Role Ste	p 3: Confirmation					
Selected User							
Name	Cisco User ID	Email	Company				
Tammy Valley	tjvalley@gmail.com	tjvalley@gmail.com	CISCO SYSTEMS INC FOR US INTERN	AL DEMO EVAL ONLY			
Available Service	Roles for Selected Users S						
* CBR U	lser 🕑	Start Date (OPTIONAL):	End Date (OPTIONAL):	m/dd/yyyy)			
• 🗌 CBR A	Admin 🕩	Start Date (OPTIONAL):	End Date (OPTIONAL):	m/dd/yyyy)			
	API Developer 🔛	Start Date (OPTIONAL):	AV)	m/dd/yyyy)			
 If the checkbo Smart Net Total 	x for the role is not selectable, I Care contracts and cannot be	it is because the user is not assoc registered for portal access.	iated with an external company, o	r the user is not a reseller of a	any of your c	ompany's	S
					Back	sign Can	cel
2018. Cisco Systems.	Inc. All rights reserved.				C	isco Confi	dential

Click the Ficon 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 \rightarrow 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.

cisco Cisco Services	Access Management					
Home Harr-Company Associations	User-Role Assignments Administrators Set					
Welcome Val Holland						
Company Administrator, PENV/OOD	D PAPERS					
Step 1: Find Business Services and	1 Roles					
Below is a sample of a CSV template to you would like to assign. Enter the Busi Cisco User ID or	be uploaded. For each user, you may provide either the ness Service and Role Names into your CSV file exactly Email	ir Cisco User ID or email address. The Business Service as they appear in the table.	e Name and Role Name columns display all of the service roles	currently available for your company. You can there fo	re use this table to find the appro	priate Business Service and Roles
ValHolland2113	vaholand@penwoodpapers.com	SNTC	320431811	CBRAPDeveloper		
VaHolland2113	valholand@penwoodpapers.com	SNTC	320431811	CustomerAdmin	19-Oct-2018	15-Nov-2018
ValHolland2113	valholand@penwoodpapers.com	SNTC	320431811	APIDeveloper	19-Oct-2018	05-Jan-2019
ValHolland2113	valholand@penwoodpapers.com	SNTC	320431811	CBRUser		24-Jan-2019
ValHolland2113	valholand@penwoodpapers.com	SNTC	320431811	CustomerUser	19-Oct-2018	15-Dec-2018
ValHolland2113	valholand@penwoodpapers.com	SNTC	320431811	CBRAdmin		19-Dec-2018
· Indicates required values for CSV	template					
Step 2: Upload Batch Role Assignm	ents					
Lise extreme caution when using this for	where If you have never used this feature review the l	rein quide				
Upload a CSV spreadsheet from your o	omputer					
Browse No file selected.	Download Template					
Check the check box, if you don't w	ant to send the email notifications to the respective rece	pients.				
Submit						
2018 Cisco Sustante Inc. All rights rates	ved					Cisco Confidenti

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.



EDCS-12712547

י כי ו ב					roleBatchTemplate ·	- Excel		
ile Home	Insert Page Layout	Formulas	Data	Review V	ïew ♀Tell me		🛕 Tammy V	alley -X (tvalley
4 👻 :	$\times \checkmark f_x$							
А	В			с	D	E	F	G
User Id	Email		Business	Service Name	Entitled Party ID	Role Name	Start Date	End Date
RitaMoran63	ramoran63@penwoodpapers	s.com	SNTC		320431811	CustomerAdmin		
MahtinMoran	MahtinMoran@penwoodpap	pers.com	SNTC		320431811	APIDeveloper		
JuanMoran24	JuanMoran24@penwoodpap	ers.com	SNTC		320431811	CustomerUser		
Venus Moran 16	VenusMoran16@penwoodpa	apers.com	SNTC		320431811	CustomerUser	18-Oct-18	18-Dec-18
ValHolland2113	valholland@penwoodpapers	s.com	SNTC		320431811	APIDeveloper		
	H Mome Home Home Landright A Jser Id RitaMoran63 WahtinMoran JuanMoran24 VenusMoran16 ValHolland2113	Ie Home Insert Page Layout Ie Home Insert Page Layout Ie Image: Image Layout Image Layout Image Layout Image Layout <td< td=""><td>Ie Home Insert Page Layout Formulas Ie Home Insert Page Layout Formulas Ie Image: I</td><td>Insert Page Layout Formulas Data Image: Insert Page Layout Formulas Data Image: Image:</td><td>Home Insert Page Layout Formulas Data Review V Image: Image Layout Formulas Image Layout Formulas Data Review V Image: Image Layout Formulas Formulas Image Layout Formulas Review V Image Layout Formulas Formulas Review Image Layout Review V Image Layout Image Layout Formulas Review Image Layout Review Review V</td><td>Insert Page Layout Formulas Data Review View Q Tell me Image: Image Layout Formulas Data Review View Q Tell me Image: Image Layout Formulas Data Review View Q Tell me Image: Image Layout Formulas Data Review View Q Tell me Image: Image Layout Formulas Data Review View Q Tell me Image: Image Layout Formulas Data Review View Q Tell me Image: Image Layout Formulas Business Service Name Entitled Party ID Image: Image Layout Formal Business Service Name Entitled Party ID 320431811 Image: Image Layout Image Layout SNTC 320431811 320431811 Image Layout VenusMoran16@penwoodpapers.com SNTC 320431811 ValHolland2113 valholland@penwoodpapers.com SNTC 320431811</td><td>Image: Second Second</td><td>Image: Second Second</td></td<>	Ie Home Insert Page Layout Formulas Ie Home Insert Page Layout Formulas Ie Image: I	Insert Page Layout Formulas Data Image: Insert Page Layout Formulas Data Image:	Home Insert Page Layout Formulas Data Review V Image: Image Layout Formulas Image Layout Formulas Data Review V Image: Image Layout Formulas Formulas Image Layout Formulas Review V Image Layout Formulas Formulas Review Image Layout Review V Image Layout Image Layout Formulas Review Image Layout Review Review V	Insert Page Layout Formulas Data Review View Q Tell me Image: Image Layout Formulas Data Review View Q Tell me Image: Image Layout Formulas Data Review View Q Tell me Image: Image Layout Formulas Data Review View Q Tell me Image: Image Layout Formulas Data Review View Q Tell me Image: Image Layout Formulas Data Review View Q Tell me Image: Image Layout Formulas Business Service Name Entitled Party ID Image: Image Layout Formal Business Service Name Entitled Party ID 320431811 Image: Image Layout Image Layout SNTC 320431811 320431811 Image Layout VenusMoran16@penwoodpapers.com SNTC 320431811 ValHolland2113 valholland@penwoodpapers.com SNTC 320431811	Image: Second	Image: Second

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.



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 \rightarrow 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 bicon next to a user's Name to display all of their currently-assigned roles.

cisco	Cisco	Services A	ccess Management												Log Out	Help
Home	User-Compa	ny Associations	User-Role Assignments Adminis	trators Settings	Other											
View	Velcome Val H Company Admini My Locations C	olland strator, PENWOOD PA Dnly	APERS							۲	View	active si	tatus only	Ovi	iew all reco	ords
View	/Change a Use	r's Role Assignme	ents										10	~	per page 🤇	Go
Filter:	Cisco User ID	~	Go Clear Filter													
	Name	Cisco User ID 👻	Email	Role 👻	Passable	Company	•	Status 💌	Start Date	End Date	•	Last	Reviewed	•	Administrat	tor
0	Val Holland	ValHolland2113	valholland@penwoodpapers.com	Smart Net Total Care:API Developer	No	PENWOOD PAPERS		Approved	Thu Oct 18 16:45:13 CDT 2018			Thu C CDT 2	ct 18 16:45: 018	14	0	
0,	Don Ah	DonAh85498657	donah@penwoodpapers.com	Smart Net Total Care:API Developer	No	PENWOOD PAPERS		Approved	Thu Oct 18 14:47:40 CDT 2018			Thu C CDT 2	ct 18 14:47: 018	41	1	
Edit	Remove Role														1	

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.

cisco Cisco Services	Access Manager	nent					Help
Home User-Company Associations	User-Role Assignments	Administrators	Settings Other				
Change Association Change Role Roles Assigned To : Val Holland vaholland@penwoodpapers.com Assigned Roles							^
PENWOOD PAPERS Smart Net Total Care							
API Developer			Start Date (OPTIONAL): 10/18/2018	(mm/dd/yyyy)	End Date (OPTIONAL):	(mm/dd/yyyy)	
Available Roles							
PENWOOD PAPERS Smart Net Total Care							
Customer Administrator			Start Date (OPTIONAL):	(mm/dd/yyyy)	End Date (OPTIONAL):	(mm/dd/yyyyy)	
Customer User			Start Date (OPTIONAL):	(mm/dd/yyyy)	End Date (OPTIONAL):	(mm/dd/yyyy)	
Assign Clear Cancel							
©2018, Cisco Systems, Inc. All rights reserve	ved.					Cisco Confi	dential

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 <u>View or Edit Existing User Role Assignments</u> section above.

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 \rightarrow Assign Roles to Users" from the top menu. Then follow the steps in the <u>Internal Roles to Users Inside the Company</u> section.

View Existing Delegated Administrators

Delegated Administrators can view existing Delegated Administrators for the company by selecting "Administrators \rightarrow 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.

"	1.1 1 :15C0	Cisco Services	Access Man	agement	-		Val Holl	land (ValHolland2113) My Acco	unt Log Out Help
	Home	User-Company Associations	User-Role Assignme	nts Administrators Settings	Other				
100 AC	View [elcome Val Holland ompany Administrator, PENWOOD My Locations Only V	PAPERS					• View active status only) View all records
	View B	Existing Administrators						10	🗸 per page 😡
	Filter:	Cisco User ID 🗸		Go Clear Filter					
		Name	Cisco ID 🗸	Email	Company -	Administrator Type 👻	Status -	Reviewed	Approval Info
	0	Don Ah 🤽	DonAh85498657	donah@penwoodpapers.com	PENWOOD PAPERS	Company Administrator	Awaiting Agreement Acceptance	Thu Oct 18 11:47:07 CDT 2018	0
	0	Val Holland 🚨	ValHolland2113	valholland@penwoodpapers.com	PENWOOD PAPERS	Company Administrator	Approved	Tue Oct 09 14:48:00 CDT 2018	0
	Remov	e							1
6	2018, Cis	co Systems, Inc. All rights reserv	ed.						Cisco Confidential

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 \rightarrow View Existing Administrators". Select the specific administrator and then click the "Remove" button.

ןיי כו	ı.ılı sco	Cisco Services	Access Ma	anagement				ValHolland2113) My	Accour	nt Log Out	Help
	lome	User-Company Associations	User-Role Assign	ments Administrators Sett	ings Other						
2	e w	elcome Val Holland ompany Administrator, PENWOO	D PAPERS								^
v	iew [My Locations Only 🗸					• View	w active status only	Ovie	w all records	
	View I	Existing Administrators						10	∼ pe	er page Go	
	Filter:	Cisco User ID 🗸		Go Clear Filter							
		Name	Cisco ID 🔹	Email	Company -	Administrator Type 👻	Status -	Reviewed	•	Approval Info	
	•	Don Ah 💄		donah@penwocdpapers.com	PENWOOD PAPERS	Company Administrator	Awaiting Agreement Acceptance	Thu Oct 18 11:47:07 CDT 2018		0	
	0	Val Holland 🚨	ValHolland2113	valholland@penwoodpapers.com	PENWOOD PAPERS	Company Administrator	Approved	Tue Oct 09 14:48:00 CDT 2018		0	
0	Remov	e								1	~
©20	18, Cis	co Systems, Inc. All rights rese	rved.							Cisco Confide	ential

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 \rightarrow Nominate an Administrator".

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

lome User-C	Company Associations	User-Role Assignments	Administrators	Settings Other		
Welcome	Val Holland	DADEDC				
Company	Administrator, PENWOOD	PAPERS				
Step 1: Sel	ect Administrator Typ	e Step 2: Nominate Adm	inistrator Step 3:	Select Company	Step 4: Confirmatio	in
elect Admini	strator Type					
lominate admin	istrator for one or more o	of the following administrato	r types:			
Company	Administrator					
Role Adm	inistrator					

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

cisco Cisco Services	s Access Manage	ement	Val Holland (ValH	olland2113)	My Account	Log Out	Help
Home User-Company Association	s User-Role Assignments	Administrators	Settings Ot	ther			
✓ Step 1: Select Administrator Type	Step 2: Nominate Admin	istrator Step 3	Select Company	Step 4: 0	Confirmation		
Nominate Administrator							
Identify and select one or more users	to associate.						
Search by Cisco User ID or Ema	1						
					Back	Next Can	cel
©2018, Cisco Systems, Inc. All rights res	erved.				С	isco Confid	lential

Show Existing Users

• s	how Existing U My Full Span o	sers f Control 🗸			
	Name 🔺	Cisco User ID 🔺	Email	Company	Administrator Type
0	Don Ah	DonAh85498657	donah@penwoodpapers.com	PENWOOD PAPERS	Role Information
0	Val Holland	ValHolland2113	valholland@penwoodpapers.com	PENWOOD PAPERS	Role Information

Search by Cisco User ID or Email

۲	Search by Cisco User ID or Email	
		Submit

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

ome	User-Compa	any Associations	User-Role Assignments	Administrators	Settings	Other		
/ Step	p 1: Select Ad	ministrator Type	Step 2: Nominate Admin	nistrator Step	3: Select Compa	ny Step 4: C	Confirmation	
omina	ate Adminis	trator						
Sh	how Existing L	le or more users to Isers	associate.					
Sh	now Existing U My Full Span o Name	ie or more users to Isers f Control v Cisco User ID	Email	Com	npany	Administrator	Туре	
Sh	and select on now Existing U My Full Span o Name A Don Ah	Isers If Control V Cisco User ID DonAh85498657	Email donah@pen.woodpa;	Com pers.com PEN	npany IWOOD PAPERS	Administrator	Type nation	
● Sh ●	And select on how Existing U My Full Span o Name A Don Ah Val Holland	lsers fControl ↓ Cisco User ID DonAh85498657 ValHolland2113	Email donah@penwoodpap valholland@penwood	Com pers.com PEN Ipapers.com PEN	IIVOOD PAPERS	Administrator Role Inform Role Inform 	Type nation nation	

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

Nominated	Delegated Adminis	strators				
Name	Cisco User ID	Email				Administrator Type
Don Ah	DonAh8549865	7 donah@penv	voodpapers.c	om		Company Administrator
Select a s	pecific company locat	ion				
Select a s Displa View Countr	Pecific company locat Company Location My Locations Or Y UNITED STATES	ion ns Available Ily v	~]		
Select a s Displa View Countr	Company locat Company Locatio My Locations Or UNITED STATES Company	ion ns Available Ny ~ Address	City	State	Country	

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

	legated Administrators		
Name	Cisco User ID	Email	Administrator Type
Don Ah	DonAh85498657	donah@penwoodpapers.com	Company Administrator
Administer A	ccess		
Select a spec	ific company location		
Dienlay C	omnany Locations Availab		
	ompany cocations Availat		
Search for	r a Specific Location		
Country	UNITED STATES	~	
Company	PENWOOD PAPERS		
Address1			
Address2			
Citv			
City State	NORTH CAROLINA		
City * State	NORTH CAROLINA		

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.

	Company	Address	City	State	Country	
0	PENWOOD PAPERS	714 RUNNING CEDAR TRL				
						Back Finish Cancel

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. 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 \rightarrow Nominate an Administrator".

cisco C	isco Services	Access Manage	ment	olland (ValHolland2113)	My Account Log Out	Help			
Home User	-Company Associations	User-Role Assignments	Administrators	Settings Other					
Company Administrator, PENWOOD PAPERS									
Step 1: Se	elect Administrator Ty	De Step 2: Nominate Admi	nistrator Step 3:	Select Company Ste	ep 4: Confirmation				
Select Admi	nistrator Type								
Nominate adm	inistrator for one or more	of the following administrator	types:						
O Compar	y Administrator								
Role Ad	Iministrator								
Exte	rnal Role Administrator								
Inter	nal Role Administrator								
					Next Can	cel			
©2018, Cisco Sys	stems, Inc. All rights reser	ved.			Cisco Confi	dential			

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.

Show Existing Users

● s	how Existing U My Full Span o	isers f Control 🗸			
	Name 🔺	Cisco User ID 🔺	Email	Company	Administrator Type
0	Don Ah	DonAh85498657	donah@penwoodpapers.com	PENWOOD PAPERS	Role Information
0	Val Holland	ValHolland2113	valholland@penwoodpapers.com	PENWOOD PAPERS	Role Information

Search by Cisco User ID or Email

۲	Search by Cisco User ID or Email	
		Submit

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

me	User-Compa	ny Associations	User-Role Assignments Admini	strators Settings	Other
Step	p 1: Select Adr	ministrator Type	Step 2: Nominate Administrator	Step 3: Select Compar	ny Step 4: Confirmation
omina	ate Administ	trator			
ALL DO NOT					
) Sh	now Existing U My Full Span o	sers	35500ato.		
) Sh	now Existing U My Full Span o	sers fControl ↓ Cisco User ID	Email	Company	Administrator Type
) Sh [N	now Existing U My Full Span o Name A Don Ah	sers fControl v Cisco User ID DonAh85498657	Email donah@penwoodpapers.com	Company PENWOOD PAPERS	Administrator Type Role Information
) Sh	Name A Don Ah Val Holland	sers <u>fControl</u> <u>Cisco User ID</u> <u>DonAh85498657</u> ValHolland2113	Email donah@penwoodpapers.com valholland@penwoodpapers.com	Company PENWOOD PAPERS M PENWOOD PAPERS	Administrator Type Role Information Role Information

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".

Display Company Locations Available

cisco Ci	isco Servic	es Access Mana	gement	Val	Holland (\	/alHolland2113)	My Account Log Ou	t Help			
Home User-	Company Associat	ons User-Role Assignment	s Admini	strators	Setti	ngs Other					
✓ Step 1: Sel	✓ Step 1: Select Administrator Type ✓ Step 2: Nominate Administrator Step 3: Select Company Step 4: Confirmation										
Nominated Delegated Administrators											
Name	Cisco User ID	Email	Administrator Type								
Don Ah	DonAh85498657	donah@penwoo	dpapers.com			External Role A	Administrator				
Display (View Country	Company Location My Locations On UNITED STATES	ns Available	~]							
Co	ompany	Address	City	State	Country						
O PE	NWOOD PAPERS	714 RUNNING CEDAR TRL	DURHAM	NC	UNITED	STATES					
O Search f	or a Specific Loca	ition									
							Back Finish Ca	ancel			
<								>			
©2018, Cisco Syst	tems, Inc. All rights	reserved.					Cisco Cor	fidential			

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

Nominated	Delegated Administrate	ors	
Name	Cisco User ID	Email	Administrator Type
Don Ah	DonAh85498657	donah@penwoodpapers.com	External Role Administrator
Administe	r Access		
Select a s	pecific company location	vailable	
 Searc 	h for a Specific Location		
· Country	/ select one	~	
· Compar	ıy		
Addres	is1		
	is2		
Addres			
City			
City State	select one 🧹		
City State	select one 🗸		

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.

	Company	Address	City	State	Country	
•	PENWOOD PAPERS	714 RUNNING CEDAR TRL	DURHAM		UNITED STATES	
						Back Finish Cancel

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

The system displays a confirmation message.

sco Cisco	Services Access Manage	Val Holland (ValHolland2113) My Account Log Out H ment
lome User-Comp	any Associations User-Role Assignments	Administrators Settings Other
Step 1: Select Ac	Iministrator Type 🗸 Step 2: Nominate Administra	tor V Step 3: Select Company Step 4: Confirmation
Nomination Comp	lete	
The sele	ected user have been successfully nomin	ated as administrator
Name	Admin Location	Admin Type
Don Ah 👤	PENWOOD PAPERS 714 RUNNING CEDAR TRL DURHAM, NC 27712 US	External Role Administrator
18. Cieco Sveteme	Inc. All rights reserved	Cisco Confide

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 <u>Assign User Roles</u> using <u>Cisco Services Access Management</u> 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 \rightarrow 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.

me oser-comp	any Associ	ations Use	r-Role Assignme	ents Ac		ors	Settings	Other			
Welcome Val Company Admi	Holland nistrator, PE	NWOOD PAP	ERS								
ep 1: Select Part	ty Location	E)									
Country	UNITED S	STATES			~	•					
 Company 	PENWOOI	D PAPERS									
Address1											
Address2											
City											
 State 	NORTH C	AROLINA	~								
Postal	-										
 indicates require 	red										
Search											
		0.00010		1.252							
Company		Address		City	State	Country	200 C				
Company PENWOOD	PAPERS	Address 714 RUNNING	CEDAR TRL	City	State	UNITED	STATES				
Company PENWOOD	PAPERS	Address 714 RUNNING	CEDAR TRL	DURHAM	State NC	UNITED	STATES				
Company PENWOOD ep 2: Find Admin	PAPERS nistrator R	Address 714 RUNNING oles	CEDAR TRL	City DURHAM	State NC	UNITED	STATES				
Company PENWOOD PEN	PAPERS nistrator R f a CSV tem	Address 714 RUNNING oles iplate to be up displays the i	CEDAR TRL	City DURHAM h user, you	State NC may prov	UNITED	STATES	coUserID (ate Adminis	or email ad	dress. Ti	he nto your
Company PENWOOD ep 2: Find Admin elow is a sample o dministrator Role T SV template exacti	PAPERS nistrator R f a CSV tem ype column y as they ap	Address 714 RUNNING oles uplate to be up displays the opear in the ta	CEDAR TRL ploaded. For eac administrator typ able.	City DURHAM h user, you es that are a	NC NC may prov	Country UNITED ide either Enter the	STATES their Cisc appropria	co User ID o ate Adminis	or email ad trator Role	dress. Ti e Types ir	he nto your
Company PENWOOD PEN	PAPERS nistrator R f a CSV tem ype column y as they ap	Address 714 RUNNING oles uplate to be up displays the is opear in the ta	CEDAR TRL ploaded. For eac administrator typ able.	City DURHAM h user, you es that are a	State NC may prov available. Email	Country UNITED ide either Enter the	STATES their Cisc appropria	co User ID o ate Adminis trator Role	or email ad trator Role Type	dress. Ti e Types ir	he nto your
Company PENWOOD PEN	PAPERS nistrator R f a CSV tem ype column y as they ap	Address 714 RUNNING oles plate to be up displays the a opear in the ta opear or	S CEDAR TRL ploaded. For eac administrator typ able. valholland@pen	City DURHAM th user, you es that are a woodpapers	State NC may prov available. Email s.com	Country UNITED ide either Enter the	STATES their Cisc appropria Adminis PartyDA	co User ID (ate Adminis trator Role	or email ad trator Role Type	dress. Ti e Types ir	he nto your
Company PENWOOD PENWO	PAPERS nistrator R f a CSV tem ype column y as they ap	Address 714 RUNNING oles uplate to be up displays the opear in the ta	S CEDAR TRL ploaded. For eac administrator typ able. valholland@pen valholland@pen	City DURHAM th user, you es that are a woodpapers woodpapers	State NC may prov available. Email s.com s.com	Country UNITED ide either Enter the	STATES their Cisc appropria Adminis PartyDA InternalF	co User ID o ate Adminis trator Role coleDA	or email ad trator Role Type	ldress. Ti ∋ Types ir	he nto your
Company PENWOOD tep 2: Find Admini- elow is a sample o dministrator Role T SV template exactl Cisco User ID ValHolland2113 ValHolland2113 ValHolland2113	PAPERS nistrator R f a CSV tem ype column y as they ap	Address 714 RUNNING oles uplate to be up displays the opear in the tr or	S CEDAR TRL ploaded. For eac administrator typ able. valholland@pen valholland@pen valholland@pen	City DURHAM h user, you es that are a woodpapers woodpapers	State NC may prov available. Email s.com s.com s.com	Country UNITED ide either Enter the	STATES their Cisc appropria Adminis PartyDA InternalF External	co User ID o ate Adminis trator Role coleDA RoleDA	or email ad trator Role Type	ldress. Ti 9 Types ir	he nto your

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.

	8	5	ç								
	File	Home	Insert	t Page Lay	out	rmulas Data Review '	View 🛛 Tell me 🛕 Ta				
CI	11	*	+	× v	f_X						
2		Α		В			С				
1	User I	d		Email			Administrator				
2	DonA	h854986	557	donah@penwoodpapers.com			PartyDA				
3	Adam	Strader		adamstrader@penwoodpapers.com			InternalRoleDA				
4	Juana	Etherid	ge315	juanaeth	juanaeth@penwoodpapers.com In/Ex-ternalRoleD/						

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.





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

cisco	Cisco Services	Access Manage	ement	Holland (ValH	olland2113)	My Account	Log Out	Help	
Home	User-Company Associations	User-Role Assignments	Administrators	Settings	Other				
	Thank you for uploading your batch administrator nomination. You will receive an email confirmation once the submissions have been processed.								
©2018, Cis	co Systems, Inc. All rights reser	ved.				C	isco Confid	lential	

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.

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 \rightarrow 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.

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.

ENWOOD PAPERS			
Available Services Subscribed Services	3		
his is a list of services to which PENWOOD	PAPERS is currently subscribed.		
his is a list of services to which PENWOOD	PAPERS is currently subscribed. Description	Subscribed Date	Expiration Date

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

ervice Catalogue		
IWOOD PAPERS		
vailable Services Subscribed Services		
This is a list of services available to PENWOOD PA services that require a registration process will only	PERS . Click "Subscribe" for automatic subscription. Click "Register" to complete / be displayed in this table once the registration process is complete.	a registration process. Status o
Title	Description	Action
Security Bulletin & Alerts (IntelliShield)	The Security Bulletin and Alerts capabi<<>>>> (More info)	Subscribe
Cisco Threat Awareness Service	The Cisco Threat Awareness Service (CTA<<>>> (More info)	Subscribe
Smart Service Capabilities (One Portal)	The Smart Service Capabilities portal i<<>>> (More info)	Subscribe
Operate Services - PNOC	Operate Services - PNOC (More info)	Subscribe
Partner Support Service	Cisco Partner Support Service (PSS) is <<<>>> (More info)	Subscribe
Partner Support Service Next Gen	Cisco Partner Support Service Next Gen <<<>>> (More info)	Subscribe
Change and Compliance Management (NCCM)	Change and Compliance Management delive<<<>>> (More info)	Subscribe
Network Health (NHF)	The Network Health capability provides <<<>>> (More info)	Subscribe
Service Full coverage	Services Full Coverage (SFC) is a uniqu<<<>>> (<u>More info</u>)	Subscribe
1 - 9 of 9 items		н н 1 ь э

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 \rightarrow 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.

cisco		EDCS-12712547	Cisco Services Access Management User Guide
Append	ix A: Frequently Asked Ques	stions	
1.	Who uses Cisco Services Access Ma	inagement?	
2	Who at my company can get nom	inated as a Delega	ted Administrator?

- 3. <u>As the first Delegated Administrator for a large company, how can I most efficiently manage access</u> for users that are geographically dispersed?
- 4. <u>My company has a lot of users. Do I have to add each one manually?</u>
- 5. <u>An associated user has left my company. What should I do?</u>
- 6. <u>I nominated additional Delegated Administrators who will manage their company organization</u> <u>user-company associations and user-role assignments. What do I need to do to ensure that I am</u> <u>not the first person contacted for user access requests?</u>
- 7. How can I see who has associated a user or nominated the additional company administrator?
- 8. <u>A user is having difficulty requesting association to my company through Profile Manager. What</u> <u>might the problem be, and how can I solve it myself?</u>
- 9. <u>A user does not see the link in Profile Manager to request for additional access to Cisco Services</u> delivered by Cisco to my company. What could be the issue?
- 10. <u>As the Delegated Administrator, I had asked users to request for a specific role using Profile</u> <u>Manager. But they cannot see this particular role in the list displayed there. Why is this</u> <u>happening?</u>
- 11. <u>I get an error while using the "batch upload" feature in Cisco Services Access Management. What</u> <u>could be the issue?</u>
- 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



- 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 <u>Appendix B</u> for additional information on the features available in Cisco Services Access Management.

Back to FAQ List

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

Back to FAQ List

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.

Back to FAQ List

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 <u>Perform User-Company Association via Batch Upload</u> 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:



- 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.

Back to FAQ List

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.

Back to FAQ List

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.

Back to FAQ List

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.

Back to FAQ List

- 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 selfassociate 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.

Back to FAQ List

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.

Back to FAQ List

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.

Back to FAQ List

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:



- 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

Back to FAQ List

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.

Back to FAQ List

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.

Back to FAQ List

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.

Back to FAQ List



15. How do I disassociate myself from my company?

To disassociate yourself from your company, go to your Cisco Account Profile <u>https://rpfa.cloudapps.cisco.com/rpfa/profile/requestorupdate_association.do</u>?. 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.

Back to FAQ List

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 onscreen menu option, for the most common Delegated Administrator actions.

Navigate By Function Navigate By Menus **Quick References** User Guide **Getting Started** Home **Cisco Services Access Management Overview** • **Onboarding a User** Introduction to Delegated Administration **User-Company Associations Batch Upload** Managing User Association Requests Edit User Access **Revalidate User Association Requests** • **View Existing Associations** • **Remove User Access** 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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Cisco Services Access Management Quick References

Getting Started Onboarding a User Batch Upload Edit User Access Remove User Access

Getting Started

Cisco Services Access Management provides for "partycentric" 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.

cisco Cisco Services Access Management

Pending Legal Agreement

Welcome to CSAM Tammy Valley !

The Cisco Services Access Management application requires that you accept the legal terms and agreements

Please click on the "Review Legal Agreement" link below to:

- Review the legal agreement
- Accept or decline the agreement once reviewed

Once you have accepted the Legal Agreement, you will have access to Cisco Services Access Management application.

Entitled Company	Administrator Type	Action
ABC COMMUNICATIONS, INC	Party Administrator	Review Legal Agreement

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Log Out

Done! Select Finish to send	the completed document.		FINISH	OTHER ACTIONS •
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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

ululu cisco	Cisc	o Services /	Access Manag	ement	Adam Stra	ader (adamstrader99)	My Account	Log Out	Help
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©2013, Ci	sco Systems	s, Inc. All rights reserv	ed.						

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 selfassociation 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.

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 <u>"see Onboarding a</u> <u>User"</u> quick reference.

Home	User-Company Associations	User-Role Assignments	Administrators	Settings	Other			
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Step) 1: Select Administrator Type	Step 2: Nominate Administr	rator Step 3: Sele	ect Company	Step 4	l: Confirmatio	on	
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) C	ompany Administrator							
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✓ Step 1: Select User	Step 2: Select Role	Step 3: Confirmation				
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Cisco Services Access Management Quick References

Getting Started Onboarding a User Batch Upload Edit User Access Remove User Access

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 <u>register for a Cisco account</u>. 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.

Home	User-Company Associations User-Role Assignments Admir
Welco Comp	me Jak Wise any Administrator, CISCO SYSTEMS INC FOR US INTERNAL DEMO E
Step 1: 9	Select User Step 2: Select Company Step 3: Confirmation
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Search by C	cisco User ID or Email
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Select a spe	cific company location to manage access.
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Country	UNITED STATES -
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•	CISCO SYSTEMS INC FOR US INTERNAL DEMO EVAL ONLY
🔘 Search fo	r a Specific Location

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 P next to the Company Name to display the list of business services. Click on the P 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.


Cisco Services Access Management Quick References

Getting Started Onboarding a User Batch Upload Edit User Access Remove User Access

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".

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".

Nominating Multiple Additional Delegated Administrators via Batch Upload

Data Format for Template

Data Format for Template



leBatchTemplate - Microsoft Excel A Page Lavout Formulas Home Data A11 f_x Α C D Ε F В 1 User Id Email Business Service Name Role Name Start Date End Date 2 andyyusser99 andyyusser99@yahoo.com SNTC CustomerUser 6-Feb-13 6-Feb-14 3 4 Data Format for Template

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Cisco Services Access Management User Guide

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".



Cisco Services Access Management Quick References

Getting Started Onboarding a User Batch Upload Edit User Access Remove User Access

Edit User Access

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

If your company has established decentralized, locationbased 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 "<u>Remove User Access</u>" 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.

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-Company Associations User-Role Assignments Administrators Settings user's company association. By default, Welcome Jak Wise the company location with which this Welcome Jak wise Company Administrator, CISCO SYSTEMS INC FOR US INTERNAL DEMO EVAL ONLY user is associated will be selected. You View My Locations Only • will be able to select a different Change a User's Company Association company location by selecting "My Full Go Clear Filter Filter: Cisco User ID 👻 Span of Control" to view all available Cisco User ID Name Email company locations. \bigcirc Suresh Vilayanur svilayan svilayan@cisco.com \bigcirc Jason Wise iakwise jakwise@cisco.com \bigcirc Jak Wise iakwisecsam j1wise@yahoo.com lorraine hsu op_nhf_nccm_intel_ext \bigcirc lorraine2@gmail.com \bigcirc lorraine hsu op_nhf_nccm_intel_sntc_ext lorraine1@gmail.com Jen Yuan Huang jenhuang \bigcirc jenhuang@cisco.com \bigcirc Ana Guerra de Menezes anmeneze anmeneze@cisco.com ۲ Shih-Yu (Sylvie) Huang syhuang syhuang@cisco.com Michal Kopec mikopec mikopec@cisco.com Ratph Herbst rherbst rherbst@cisco.com \bigcirc Edit Remove Association

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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 role assignment, use 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.

View	My Locations Only	•			
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0	Ana Guerra de Menezes	anmeneze	anmeneze@cisco.com	Test Bsslp For EF 1.3:ITV short desc updated	
Edit	Remove Role				

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

Assigned Roles			
CISCO SYSTEMS INC FOR US INTERNAL DEMO EVAL ONLY			
API Management Application			
Partner Support Service			
 CISCO SYSTEMS INC 			
API Management Application			
Entitlement Framework External API Services			
SupportTools			
Test Bsslp For EF 1.3			
Test Bsslp For EF 1.3			
CISCO SYSTEMS INC			
Proactive Change Management (NCCM)			
 Smart Service Capabilities (One Portal) Berther Current Capilies 			
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 Security Burletin & Aleria (International) Notwork Leadth (NLLE) 			
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EDCS-12712547 Cisco Services Access Management User Guide

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	Home User-Company Associations User-Role Assignments Administrators Settings Other Charge Association Change Role Assigned Roles All Management Application Partner Support Service Charge Structure All Management Application All Management Application All Management Application All Management Application
Start Date is left blank, the role assignment is immediately active. If the	API Console User API Console User Childement Framework External API Services SupportTools
End Date is left blank, the role assignment will remain active	Available Dates Home User-Company Associations User-Role Assignments Administrators Settings Other
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	API Management Application Entitlement Framework External API Services SupportTools Available Roles
the start/end dates. Click "Save".	CISCO SYSTEL® INC Emactive Change Management (NCCM) Cisco Delivery Engineer Start Date : (mm/dd/yyyy) End Date : (mm/dd/yyyy) Fard Pate : Partner Support Service

Cisco Services Access Management Quick References

Getting Started Onboarding a User Batch Upload Edit User Access Remove User Access

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.

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.

Home	User-Company Associ	iations User-Role Assignment	s Administrators Settings			
Welcome Jak Wise Company Administrator, CISCO SYSTEMS INC FOR US INTERNAL DEMO EVAL ONLY						
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Change a User's Company Association						
Filter:	Cisco User ID 👻	Go Clear Filter				
	Name 👻	Cisco User ID 🗸 🗸	Email 🗸 🗸			
\bigcirc	Suresh Vilayanur	svilayan	svilayan@cisco.com			
0	Jason Wise	jakwise	jakwise@cisco.com			
0	Jak Wise	jakwisecsam	j1wise@yahoo.com			
0	lorraine hsu	op_nhf_nccm_intel_ext	lorraine2@gmail.com			
\bigcirc	lorraine hsu	op_nhf_nccm_Intel_sntc_ext	lorraine1@gmail.com			
0	Jen Yuan Huang	jenhuang	jenhuang@cisco.com			
0	Ana Guerra de Menezes	anmeneze	anmeneze@cisco.com			
0	Shih-Yu (Sylvie) Huang	syhuang	syhuang@cisco.com			
0	Michal Kopec	mikopec	mikopec@cisco.com			
0	Ralph Herbst	rherbst	rherbst@cisco.com			
Edit	Remove Association					

Home User-Company Associations User-Role Assignments Administrators Settings Welcome Jak Wise Company Administrator, CISCO SYSTEMS INC FOR US INTERNAL DEMO EVAL ONLY View My Locations Only -Change User-Role Assignment Filter: Cisco User ID 👻 Go Clear Filter Name Cisco User ID 🔹 Email Role API Management Jak Wise ٢ jakwisecsam j1wise@yahoo.com Application:API Console User API Management ed amemiya edamemcisco1 edamemcis@gmail.com Application:API \bigcirc Console User Test Bsslp For Ana Guerra de Menezes anmeneze anmeneze@cisco.com EF 1.3:ITV short desc updated Edit Remove Role

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