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# **Cisco Partner Support Service (PSS)**

# User Guide - User Registration

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# **Important Registration Information**

#### Please Read before Registering Users to the PSS 3.x Portal

You can launch the Partner Support Service Portal from your web browser at <u>https://services.cisco.com</u>. For registering new users, Partner Administrators can use the Manage Users action to add, edit, or delete users to their Partner Definition (company access).

Please contact the Cisco Technical Support and open a support case if you have any issue with the registration process. E-mail: <u>tac@cisco.com</u>

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**Note** Do not be confused by the Cisco Services Connection label you see on the screen. When you see the Cisco Service Connection name at the top of the left navigation pane you are viewing the Partner Support Service (PSS) portal.

# **About This Document**

This chapter provides information about user registration, describes the terminology that is used during user registration. This chapter covers the following sections:

- Overview
- User Registration

## **Overview**

This section covers the following topics:

- <u>Terminology</u>
- Partner Registration and Role-Assignment Process Flows
- Defining a Partner Organization
- PSS Roles and Task/Data Access Matrix



**Note** User Registrations for foundational capabilities are done using SAMT and the API Console using CSAM.

# Terminology

The following key terms are used in the user registration process:

**Partner** – Purchases PSS for their end customers and can be assigned a <u>user role</u> in the Cisco Services Connection portal so they can access their end customer's network data.

**Cisco Services Connection portal** – This portal is a user interface that provides access to all data associated to Cisco Services Connection, as entitled by the respective user role. Administrators and users can access the data and reports of all customers to which their user roles have been associated. The portal allows users to customize reports generated by this service and to perform additional actions.

**Contracts** – A partner must have a supported Partner Support Service (PSS) type contract in their user's Cisco.com profile. The partner company must have purchased a PSS contract for at least one end customer in order for users in the partner company to be registered and get access to the data for end customer(s).

PSS Roles:

- Partner Super Administrator (SA) Cisco Support Agent On-Boards the Partner Administrator to PSS Cisco Services Connection Portal as a Super Administrator, who registers employees to access Smart capabilities using the PSS Portal.
- **Partner Administrator (PA)** A Partner Administrator (PA) role can register users. The Partner Administrator privileges allow the administrator to perform the following tasks:
  - Register a collector.
  - Download a license file.
  - Maintain collector registrations. [Add, Edit and Delete]
  - View all reports.
  - View, manage, and update PSS user access to end customer company information.
- Partner User (PU) A Super Administrator or Partner Administrator assigns a Partner User (PU) role to a registered user. A Partner User cannot manage other company users, user roles, or company associations. A partner company may or may not have a Partner User.

A Partner User can perform the following tasks:

- Access only those end customers that they were associated to by PA or SA.
- Access one, multiple, or all end customers of the partner company, which gives them visibility to all the data and reports for these end customers (inventory, contracts, alerts, and so on).
- Register a collector
- Download a license file
- Maintain Collector Registrations
- End Customer Company The Company, for which the partner purchased PSS contracts for.

# Partner Registration and Role-Assignment Process Flows

Cisco Support Administrator on-boards the PSS partner, once he receives a request for a Partner Super Administrator. This Super Administrator would then have the ability to register employees using the <u>Cisco</u> <u>Services Connection</u> Portal.

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**Note** A user can be assigned the Super Administrator role for only one Partner Definition (company) and can also be assigned Partner Administrator or Partner User roles for Partner Definitions (company). As a Super Administrator, he has full access and is primarily responsible for managing the Partner Definition, managing collectors and assigning roles to the users using Cisco Services Connection portal.



A Super Administrator can create other profiles and associate one ID for the Partner Definition (company). Next, the Partner Administrator role is on-boarded by either the Super Administrator, or another Partner Administrator. This role has access to reports, collectors EXCEPT the Partner Definition. As a Partner Administrator you can add additional users, by registering user and assigning a role. Partner Users can access the PSS Cisco Services Connection and manage CSPC collector registrations and run all the reports for the customers they've been granted access to by their Partner Administrator.

# **Defining a Partner Organization**

Partner Support Service Portal provides "partner definition(s)" to define the PSS customer contracts being managed. When Partners are approved as a Cisco Partner, they are issued an ID. Partners have the option of having one ID for the entire company, or they can register regional offices with unique IDs.

Each Partner company (ID) will provide a Super Administrator, a registered CCO ID Profile of customer contracts for PSS, which serves as the basis for the PSS Portal Partner Definition.

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Note The Partner Definition consists of one or more of the partner Bill-To IDs used to purchase PSS contracts for their Customers. Both the Partner ID and the Bill-To IDs are issued by Cisco to new approved partners. Currently, all the existing PSS Partners have been migrated, using the Partner ID's Name.

Perform the following steps:

1. As a partner with registered CCO ID, open a case to assign the Super Administrator CCO ID to Partner Definition.



**Note** Bill-To IDs will be pulled from the Super Administrator Cisco.com ID profile (associated Service Contracts) to define the Bill-To IDs in the Partner Definition in the Portal.

- 2. Super Administrator has to access the Partner Definition page to confirm the Bill-To IDs. Users are then registered to a Partner Definition and all customers for the Bill-To IDs will be displayed in the Add User page. Refer Manage Partner Definition section in Chapter 3 of User Guide.
- 3. Partner Administrators are granted access to ALL customers in the Partner Definition, whereas Partner Users can be restricted to a subset of the customers.

Partner definitions could be based on different scenarios where association is with one location or with multiple Bill-To Addresses / locations.

# **PSS Roles and Task/Data Access Matrix**

#### **User Roles**

Each employee is assigned a role for accessing customer data on the PSS Portal.

- A **Super Administrator** maintains the Partner Definition of the customer contracts that will be managed with PSS Smart services and is automatically registered as a Partner Administrator; enabling immediate user registrations. It appears in the Manage Users list as a Partner Administrator.
- **Partner Administrator**: Has access to all functions in the PSS Portal for all customers included in the Customer Definition from registering users on the portal, to running reports and collector management.
- **Partner User:** Has access to all PSS Portal functions except "Manage Users" for all customers or a subset of the customers as set up by the Partner Administrator.

The following illustration provides the different PSS roles and indicates what end customer data each user role has access to:

Name	Assignment	Actions	Scope
Partner Super Admin	By Cisco Support	<ol> <li>Partner Definition Administration</li> <li>User Administration</li> <li>CSPC Collector Administration</li> <li>All Reports</li> </ol>	All Customers
Partner Admin	By Super Admin, or Partner Admin	<ol> <li>User Administration</li> <li>CSPC Collector Administration</li> <li>All Reports</li> </ol>	All Customers
Partner User	By Super Admin, or Partner Admin	<ol> <li>CSPC Collector Administration</li> <li>All Reports</li> </ol>	Sets of Customers

#### Table 1: A list of user roles and the group of tasks that can be performed

The illustration explains a list of user roles and the group of tasks that can be performed.

#### **User Registration**

The user registration process for the default administration process flow covers the following areas:

- User Registration Process
- <u>Collector Registration Process</u>

# **User Registration Process**

Partner Administrator can 'Manage Users' to see user list and what customers each user has access to.

The data in this grid displays information of the logical partners with the role that the Super Administrator or Partner Administrator assigned. Super Administrator or Partner Administrator can create a new User and assign Partner Administrator or Partner User role to that partner. Super Administrator or Partner Administrator can register a new user, register a collector and deploy it to the inventory collection.

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pss-spl_01glyahoo	,onny	pstapicharusertwi pstapicharusertwi	NETWORK SOLUTIONS PRIVATE LTD	Partner Administrator	
piscaconewsa011		PasNeeCaco SyeAdminWithAlBide	NETWORK SOLUTIONS PRIVATE LTD	Pather User	
CON_text_Ho2		soft ToutTwo	NETWORK SOLUTIONS PRIVATE LTD	Partner Administrator	

**Description:** Manage User data grid provides you with a list of all the Partner Users and Partner Administrators registered to use the PSS Portal for a Partner.

**Usage:** Click the Action icon on the left of a row and select to edit, or delete a user from the menu. A Partner Administrator can also select from the **Actions** drop down as highlighted in the image above to add a new user.

#### **Column Headings and Definitions:**

CCO ID: The unique Cisco.com ID of a partner assigned either a Partner Administrator or Partner User role.

Name: Name of the user who is granted access.

Partner Name: Name of the partner company that this user belongs to.

**Role**: The user role assigned to this partner's CCO-ID on the PSS 3.x portal, either Partner Administrator or Partner User.

### Add User

The following information provides screen captures of the report, and the steps to provide a new user with access to the PSS 3.x Portal. Super Administrator or Partner Administrator can add users and assign role. Right-click on a row and select **Add User**. Use a column filter to search based on certain criteria such as Name or User Role.

ame:			Email:			
ompany	/Organization:		Business Address:			
usiness F	Phone Number		Access Level:			
Select P	artner: Ciso	o Systems Inc Credit Card	<b>T</b>			
Select a	Role:		A Partner Admin will have access to all cu	stomers on the contract. A P	arther User can be restricte	ed.
Choose	Le	Grant user the access of the import	Address	City	Country	
	Registered	Gustomer	Address	City	Country	
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 Enter CCO ID and click Verify CCO ID. If a valid CCO ID is entered then the profile data of the user is populated and displayed.

<u>)</u> Note

- a. Ensure that the correct CCO ID of a user is entered with Partner Access level 3.
- b. Click Verify CCO ID to ensure correctness and also that the user is the one you wish to assign to your company's Partner Definition.
- c. Incorrect CCO IDs will provide access to wrong users.
- d. These IDs can be deleted by any Partner Admin or Super Administrator if incorrect.
- Select the name of the related Partner.
- Select a role to be assigned: Partner Administrator or Partner User.
- Select the customers from the available list (for Partner User role only).

Is Registered: Customer is registered with this partner [Yes/ No]

Customer: Name of the customer.

Address: Address of the customer location.

City: Name of the City where customer is located.

**Country:** Name of the Country of the customer.

• Click **OK**. A message indicating the User has been successfully registered for the selected customers is displayed.

Now Partner Administrators can register a collector. Refer to Manage Collectors under Data Sources section.

### **Edit User**

A Partner Administrator can modify the details of a user by clicking on the **Action** menu icon on the left of a row on the Manage Users report and then selecting **Edit User** from the menu.

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As a Partner Administrator, you can change the role of the selected partner user and select the customers whose data the user is entitled to see.

# **Collector Registration Process**

The **Super Admin** and **Partner Administrators**, can manage the Collectors to maintain installed collectors for one or more customers while a **Partner User** can manage the collectors for the customers that they are entitled to. It is assumed that either the physical or virtual Collector has been installed; or you are now ready to apply the PSS server image and obtain the security certificate required to activate the collector. You can register a new collector for a customer site, edit or delete the Collector registrations, regenerate a new collector security certificate, and revalidate a blocked inventory upload.

• From the Cisco Services Connection Actions, select **Manage Collectors**. The Manage Collectors window appears displaying the Customer name, Collector Count, and count of Collectors Requiring Revalidation.

Mar	hage Collectors (2 Customer(s))						00
Act	tons +) (Export +)						00
	Customer	+	Collector Count		Collectors Requiring Revail		1
	ASHOK LEYLAND LTD			320		98	
	VIDEOCON INTL LIMITED			220		83	

• Manage Collectors data grid displays the Customer name, Collector Count and count of the Collectors that Requiring for Revalidation.



The Cisco data center will block a customer's inventory collection from uploading, if there are no devices covered on a PSS supported contract. You can unblock only by purchasing or renewing the contract. PSS sends email before all contract will expire, and again, when the inventory upload is blocked.

### **Registering a New Collector**

Before a Collector can upload information to the Cisco Data Center to be processed and made available in the PSS portal, it must be registered to a customer site. In addition, a security certificate will be issued which must be downloaded and applied to the Collector.

A successful collector registration will allow a validation to occur that creates a connection between the collector and the Cisco data center.

• From the Manage Collectors report, click the Actions drop-down list and select Register a New Collector. The Register a New Collector window appears.

Follow the step to register a ne	w Collector, * indicates required field				
1. Select a Partner*: C	ISCO SYSTEMS INC - CREDIT C	*	Step 1: Select	Partner Definition Name.	
2. Search Outloner by 👔 Name 🐑 Contract	Number (ct)	Seath	<u>2_</u>		
Phase only all load tree characters for a	Castoney Hare or full Contract Number and pick the S	unit tuftor hi kust the C	Contraction (Contraction)		
3. Select a Customer*:			Step 7: Search (	ustomer Name.	
Customer			To search, enter	r at least three characters	
No fiter applied			for a Customer	Name or full contract	
			customer list.	ck Search button to load the	
			Step 2: Select	Cutoma	
			+ step s: select	a customer.	
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Note

✓ As a Partner User, you can manage collectors only for the customers you are entitled / associated to. Otherwise a message indicating you are not authorized to create / register a new collector for that customer will be displayed.

- ✓ If the Contract Number provided is not included in the Partner Definition or does not belong to the partner, no customer information will be displayed. Customer information will only be displayed if the Contract is in the current Partner Definition.
- Enter all the required information, which is designated by an asterisk (\*). Step1. Select the **Partner** company name from the drop down list.

Step2. Select an option as **Name** or **Contract Number** to search the customer. Enter at least three characters for a **Customer Name** or full **Contract Number** [only numeric and maximum 20 digits] and click **Search.** This populates the customer list and display in the grid.

Step3. Click the radio button to select the **Customer** from the table.

• (*Optional*) For a long list of companies, you may want to add a filter to show only the company where the collector will be registered.

Match [all rules] = Customer contains LTD Column Customer Condition contains Value LTD	Match: [all rules] = Customer contains LTD Column Customer Contains Contains
Customer containe LTD Column Customer Condition (contains Value LTD	Customer contains LTD Column Customer Contition contains Value
Column Customer Condition contains Value LTD	Column Customer Condition contains
Condition contains Value LTD	Condition contains
contains Value LTD	contains Value
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- Set the **Column** to Customer.
- Choose a Condition such as "contains"
- In the Value field, enter the company name.
- Click the Filter button
- Step4. Click the radio button to select the **Customer** with the address to which the new collector will be registered.
- Step5. Select the Inventory from the drop down list of **Existing** Inventories or select **New** and enter a name for the new inventory.
- Step6. Enter a Collector Name and Custom Reference Number.
- Step7. The **Custom Site ID** is an auto-populated field. You may change it to more clearly describe the location of the collector you are registering. The allowed characters include alphanumeric, #, &, \_ and characters.
- Step8. Click the **Add** button; a message appears indicating that the submission was successful and instructs you to download a certificate. An email, which includes the details related to the Collector and a link to download the registration zip file, is sent to the end user.

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Note Only the user who registers a collector will receive e-mail notifications for Collector Registration, Uploads, and Re-validations.

### **Downloading a Certificate**

Downloading a certificate provides you entitlement files, a security certificate and other registration related files that are used when installing the Collector entitlement file. To download a certificate, click the Download Certificate link in the registration success message dialog box.

Register a New Collector	×
CSP-C Name:	
Information	×
Entit REG-INFO-83001: Your CSP-C regi submitted successfully. To complet installation you will need a Security Registration information files, which from Download Certificate	istration has been e the CSP-C Certificate & h you can download

- A zip file window appears requesting you to either save or open the entitlement file, which contains the certificate (license file) and other registration files.
- Save the zip file in your local system.

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**Note** If the Download Certificate fails with the message "An error occurred while downloading the CSPC certificate. Please try again later or contact Cisco Technical Support at <u>tac@cisco.com</u> if the problem persists" then wait for few minutes and try to download the certificate again. Refer <u>Generating a New Collector Certificate</u> section.

### **Viewing Collector Details**

- From the Cisco Services Connection Library, select **Manage Collectors**. The **Manage Collectors** window appears including the Customer Name, Collector Count, and Collectors Requiring Revalidation details.
- Click the number link in the Collector Count column of a selected customer. The Collector details window appears displaying the Collector ID, Customer name, the Inventory name, Collector Name, and Upload information.

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Art	ons •) (Export •	D							<b>0</b> 🔍 📃 🗩
	Collector 1	Gutterser	Collector Name	intensitivy.	Registration Status	Site (2)	Referenz	Collector Ve	Last Successful Upload Date
	CSP0001005582	ASHOK LEYLAND LTD	SEGMOROP-N114-27thJune	SEGMOROP-N114-27thJ	Completed	******	148840000050	6.2	Jan 14, 2015
	CSP0001008580	ASHOK LEVLAND LTD	SEGMDROP-full upload-271	SEGMDROP-full upload-2	Completed	SEGMDROP.		2.3	Ad 7, 2014
	CSP0001008613	ASHOK LEVLAND LTD	SE 2_0-fullupload_2-7-14	SE 2_0-fullupload_2-7-14	Completed	SE 2_0-fully		2.3	Feb 26, 2015
	CSP0001006855	ASHOK LEYLAND LTD	SE2_0_NPDR1_Text-8-7-14	SE2_0_NPOR1_Tes1-5-7-14	Completed	SE2_0_NPD			
	C8P0001006655	ASHOK LEYLAND LTD	SE2_0_Manual_optoad_Test	SE2_0_Manual_upload_T	Completed	SE2_0_Wan		2.3	<i>34</i> 7,2014
	CSP0001008656	ASHOK LEYLAND LTD	SE2_II_Manual_oploadI1_8-7	SE2_0_Manual_upload1	Completed	SE2_0_Man		2.3	Jan 11, 2016
	C8P0001008673	ASHOK LEYLAND LTD	SE2_6-opload-10-7-14	SE2_0-upload-10-7-14	Completed	SE2_0-upfos		1.3	Jan 12, 2015
	CSP0001006714	ASHOK LEYLAND LTD	SE2_0_CSPC_collector	SE2_0_CSPC_collector	Completed	SE2_0_CS#	1481320801404		
	CSP0001008717	ASHOK LEVLAND LTD	SE2_0-CSPC-CD3-Full-uptood	SE2_0-CSPC-CD3-Full-u	Completed	8E2_0-C8P			

- Right-click a selected collector to perform any one of the following tasks:
  - o Editing Collector registrations
  - o Deleting Collector registrations
  - o Generating a new collector security certificate

### **Editing Collector Registrations**

As an Administrators, you can edit the Collector registrations only on those registrations that have a registration status of "Completed". Registrations that are in an unregistered state cannot be edited.

- To edit the Collector registration, select Manage Collectors from the Cisco Services Connection Library.
- Click the "Collector Count".
- Select any Collector that needs to be edited.
- Mouse hover on the left of the selected Collector, click the **Action** icon or right-click the Collector and click **Edit Collector Registration**. The **Edit Collector Registration** window appears.

Customer	CISCO SYSTEMS INC	
Collector Name	SE19_stage_conn_sanity_CSPC2_1	
Reference Number		
Site Id		
inventory.	SE19_stage_conn_sanity_CSPC2_1	
Appliance ID	CSP0001005829	

- Modify the collector name and serial number of the collector.
- Click **OK.** The Collector information is edited.
- An email notification is sent to the user regarding the update of the collector registration.

### **Generating a New Collector Certificate**

To access new features for your collector, you must first download a new image(s), and then generate, and apply, a new security certificate.

- To generate a new collector, select **Manage Collectors** from the Cisco Services Connection Actions panel.
- Select any Collector for which a new security certificate needs to be generated.
- Mouse hover on the left of the selected Collector, click the Action icon and select the Generate a New Certificate or right-click the Collector and click Generate a New Certificate. The Generate a New Certificate confirmation window appears.



- A confirmation window appears to verify that you want to **Generate a New certificate** and invalidate any existing certificate previously downloaded.
- Click Download.
- An email notification is sent to the user regarding the generation of a new certificate.