Cisco Partner Support Service (PSS)

User Guide - User Registration

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## Table of Contents

**Important Registration Information**  
- About This Document  
- Overview  
- Terminology  
- Partner Registration and Role-Assignment Process Flows  
- Defining a Partner Organization  
- PSS Roles and Task/Data Access Matrix  
- User Registration Process  
- Collector Registration Process
Important Registration Information

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

You can launch the Smart Care Portal from your web browser at https://services.cisco.com. 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 Smart Services Bureau and open a support case if you have any issue with the registration process. E-mail: ask-smart-services@cisco.com

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:

- Terminology
- 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 user role in the Smart Services Connection portal so they can access their end customer's network data.

**Smart Services Connection (SSC) portal** – This portal is a user interface that provides access to all data associated to Smart 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 Smart Services Connection (SSC) 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 Smart Services Connection Portal.

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 SSC portal.

Cisco Admin

1. On-Boards a User
2. Assigns a Super Admin role
3. Request for a CCO ID to be assigned to Super Admin role
4. Logins to SSC Portal
5. Creates a Partner Definition [profile]
6. Associates User to Company
7. Assigns Role
8. PA/PU Authorized to login to SSC Portal

Partner Super Admin

1. Open a Support case with Registered CCO ID
2. On-Boards a User
3. Assigns a Super Admin role
4. Request for a CCO ID to be assigned to Super Admin role
5. Logins to SSC Portal
6. Creates a Partner Definition [profile]
7. Associates User to Company
8. Assigns Role
9. PA/PU Authorized to login to SSC 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 Smart 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.

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 PD, 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.
Chapter 2 User Registration

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:

<table>
<thead>
<tr>
<th>Name</th>
<th>Assignment</th>
<th>Actions</th>
<th>Scope</th>
</tr>
</thead>
<tbody>
<tr>
<td>Partner Super Admin</td>
<td>By Cisco Support</td>
<td>1. Partner Definition Administration</td>
<td>All Customers</td>
</tr>
<tr>
<td></td>
<td></td>
<td>2. User Administration</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>3. CSPC Collector Administration</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>4. All Reports</td>
<td></td>
</tr>
<tr>
<td>Partner Admin</td>
<td>By Super Admin, or Partner Admin</td>
<td>1. User Administration</td>
<td>All Customers</td>
</tr>
<tr>
<td></td>
<td></td>
<td>2. CSPC Collector Administration</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>3. All Reports</td>
<td></td>
</tr>
<tr>
<td>Partner User</td>
<td>By Super Admin, or Partner Admin</td>
<td>1. CSPC Collector Administration</td>
<td>Sets of Customers</td>
</tr>
<tr>
<td></td>
<td></td>
<td>2. All Reports</td>
<td></td>
</tr>
</tbody>
</table>

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
- Collector Registration Process
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.

**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 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 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.

- 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.

  **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.

![Edit User](image)

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

- 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.

![Register a New Collector window](image)

- 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 (*).

Step 1. Select the Partner company name from the drop down list.

Step 2. 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 will populate the customer list and display in the grid.

Step 3. 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.

- Click the filter icon

  ![Filter Icon](image)

  - Set the **Column** to Customer.
  - Choose a **Condition** such as “contains”
  - In the **Value** field, enter the company name.
  - Click the **Filter** button

**Step 4.** Click the radio button to select the **Customer** with the address to which the new collector will be registered.

**Step 5.** Select the Inventory from the drop down list of **Existing** Inventories or select **New** and enter a name for the new inventory.

**Step 6.** Enter a **Collector Name** and a **Custom Reference Number**.

**Step 7.** 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.

**Step 8.** 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.

**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.

- 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.

Note: If the Download Certificate fails with the message "An error occurred while downloading the CSPC certificate. Please try again later or contact Technical Support at ask-smart-services@cisco.com if the problem persists" then wait for few minutes and try to download the certificate again. Refer Generating a New Collector Certificate section.
Viewing Collector Details

- From the Smart 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.
- Right-click a selected collector to perform any one of the following tasks:
  - Editing Collector registrations
  - Deleting Collector registrations
  - 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 Smart 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.

- 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 will 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 Smart 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.