

Configure Partner Admin and User Roles in CXCloud

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Introduction

This document describes all the required steps to configure the Partner Admin and Partner User roles as needed.

Prerequisites

Requirements

Cisco recommends you have knowledge of these topics:

- Super User Admin (SUA) Role, to complete the configurations.
- Partner needs to be present on the Partner Self Service portal (Guide and link to the portal available below):
- [Partner Self Service User Guide](#)
- [Partner Self Service Portal](#)

Components Used

The information in this document is based on these software and hardware requirements:

- [CX Cloud Portal](#)


The information in this document was created from the devices in a specific lab environment. All of the devices used in this document started with a cleared (default) configuration. If your network is live, ensure that you understand the potential impact of any command.

Configure


Configurations

As a broad summary of what you need to do:

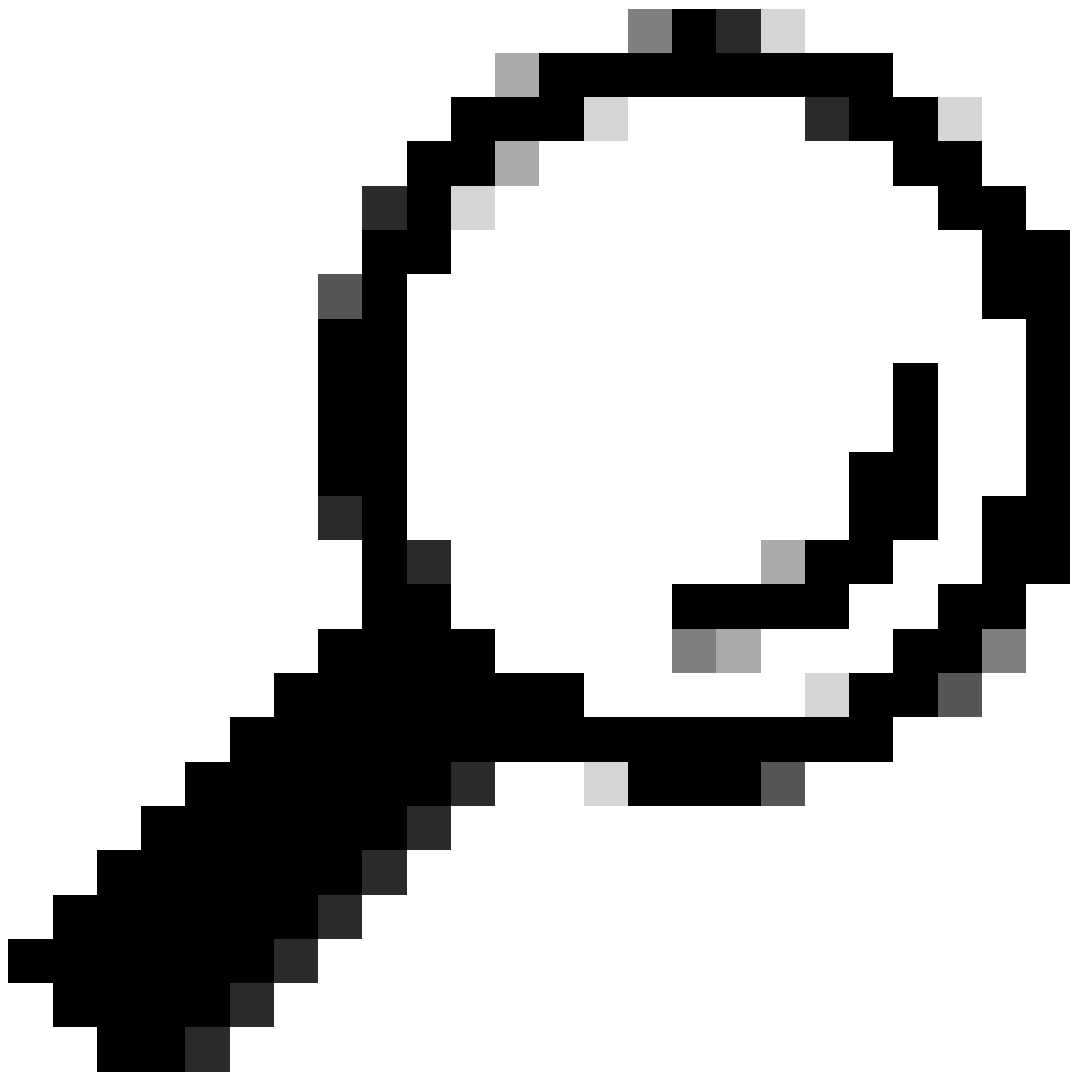
1. Create an **asset group**.
2. Create a **user group** for the Partners.
3. Create a rule within **Identity & Access**.

 **Note:** The least privilege principle is not applied in CX Cloud. Access is cumulative, meaning the highest role granted is the one in effect at any given time.

Create an Asset Group

 **Note:** This section is optional. Please skip if you plan to use the All Assets group.

1. Log in to [CX Cloud Portal](#) with a SUA.
2. Open the **Admin Center**.



Tip: It is the Gear/Cog icon on top, right corner.

-
3. Click on **Asset Groups**.
 4. Click on **Create** button.
 5. Select whether you want a **Static** or a **Dynamic** group.

The screenshot shows the CX Cloud interface. At the top, the 'Asset Groups' tab is selected (callout 3). In the top right, the 'Create' button is highlighted (callout 4), and its dropdown menu is open, showing 'Dynamic Group' and 'Static Group from CSV File' (callout 5). The main table lists 23 Asset Groups with columns for Group Name, Assets, and Group type (Static or Dynamic). A 'Back' link is visible in the top left.

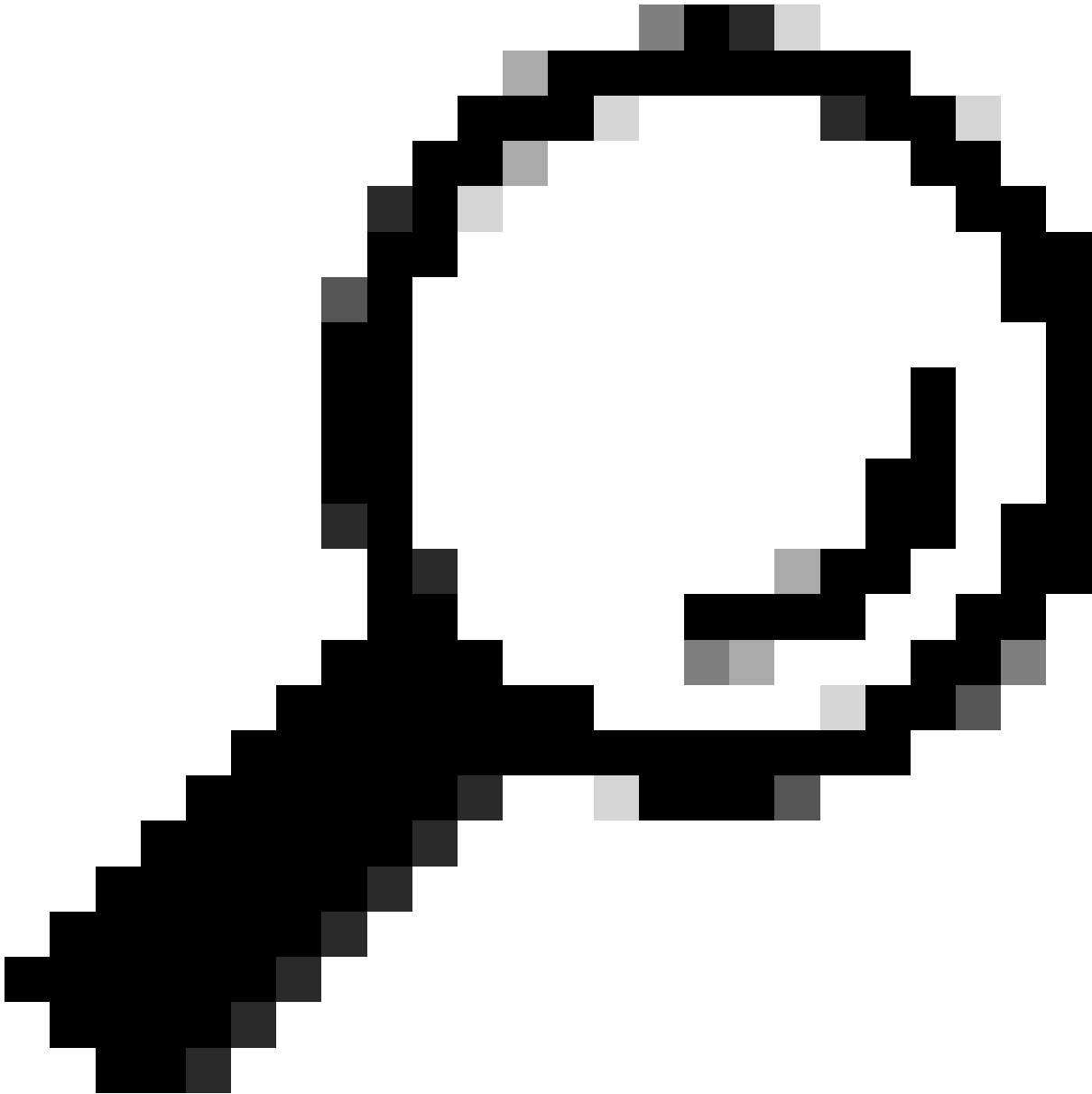
Steps to Create an Asset Group in CXCloud

Static Groups

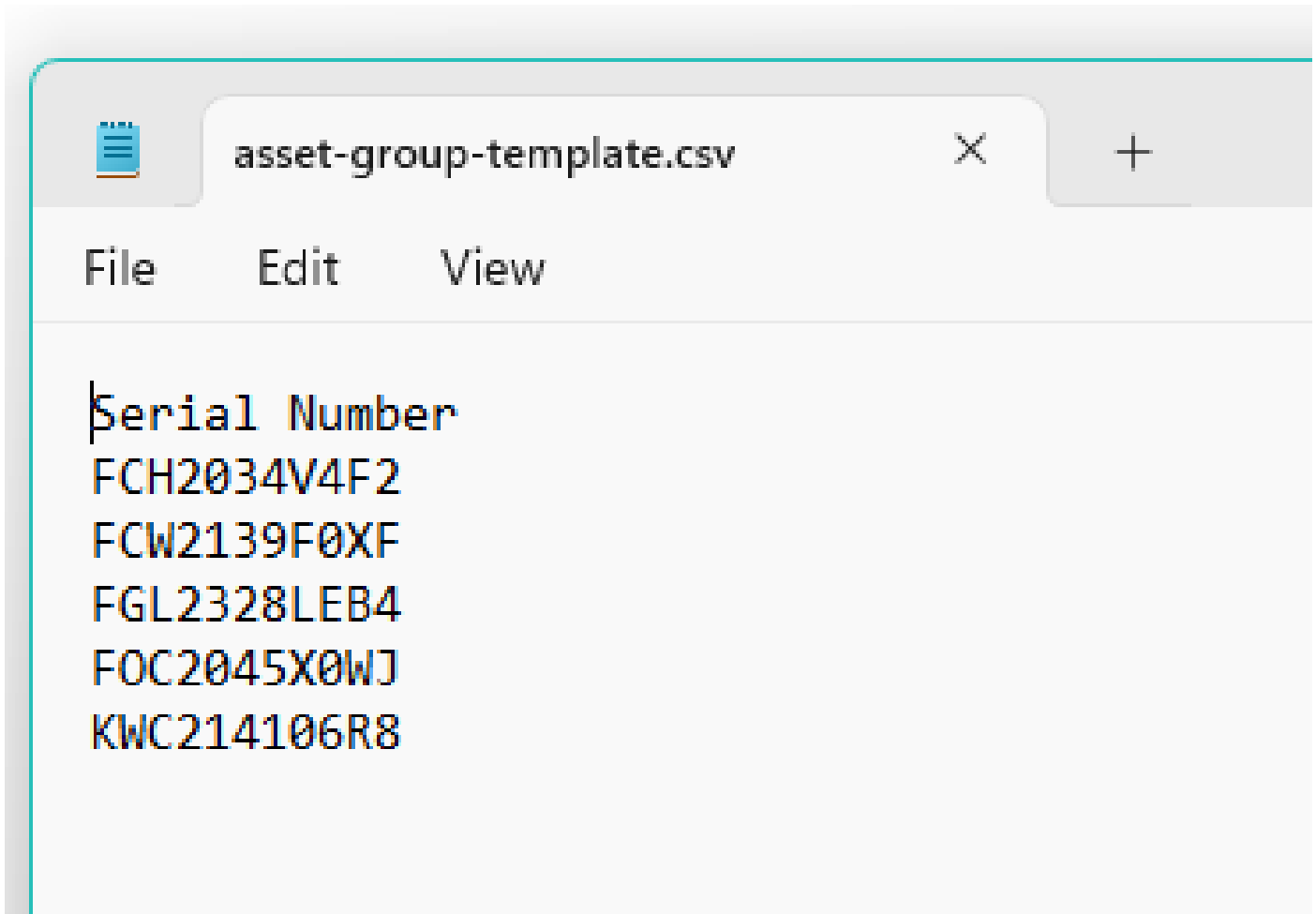
5.1.1 Static groups require the use of a template, available to download when creating the group by clicking the **template** text in blue.

The screenshot shows the 'Create Static Asset Group' form. The 'Group Name' field contains 'Partner_Admin_Static' with a character count of 20/200. Below the form, there is a section for uploading a file, with a cloud icon and an upward arrow. The text reads: 'Drag and drop or [browse files](#). Max upload: 5MB'. At the bottom, there is a 'Create Group' button.

5.1.2 The template needs to be populated with Serial Numbers.



Tip: You can edit it on multiple programs. For this example, Notepad was used.



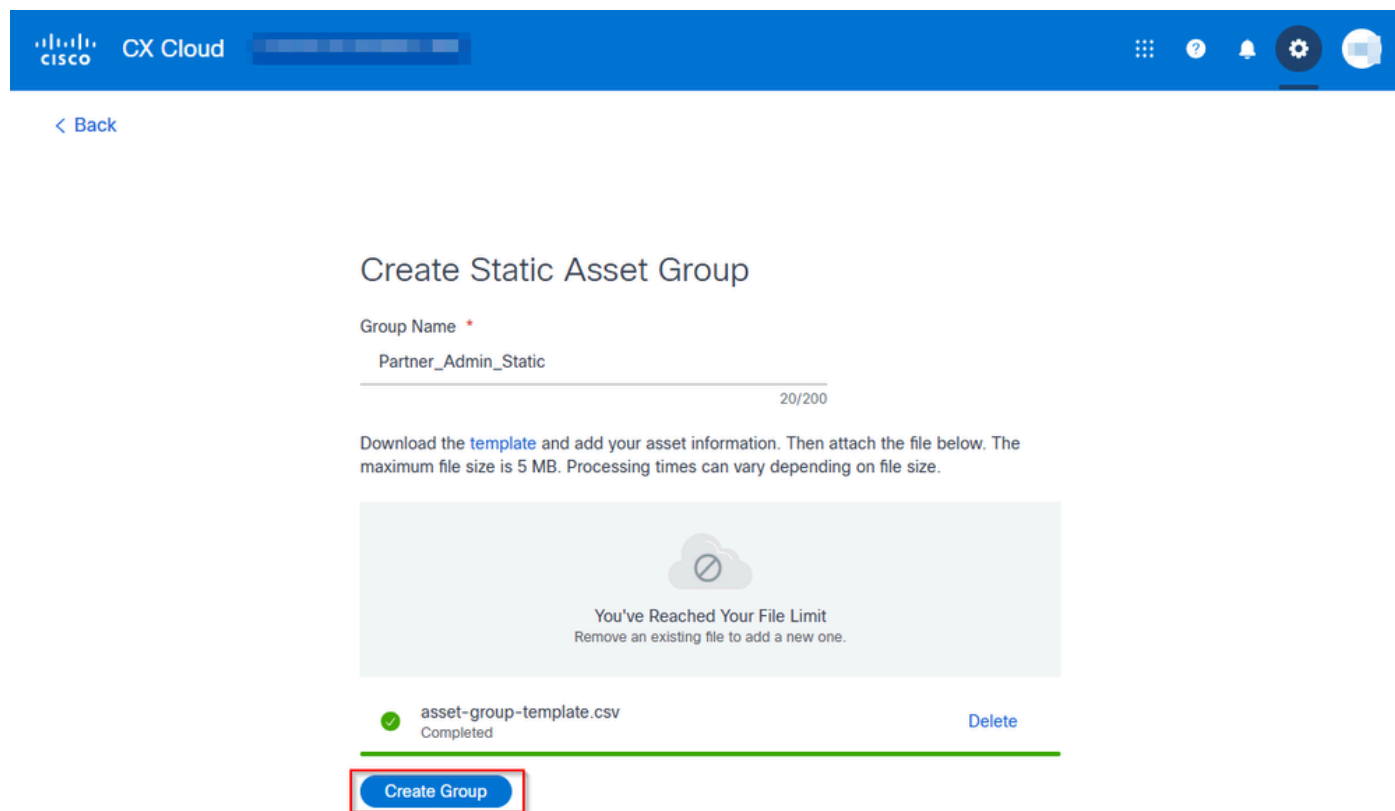
Example of the Template for a Static Asset Group

5.1.3 Upload the file by dragging and dropping it over the cloud icon or select it from your files by clicking the **browse files** text in blue.

A screenshot of the 'Create Static Asset Group' form in the Cisco CX Cloud interface. The form includes a 'Group Name' field with the value 'Partner_Admin_Static' and a character count '20/200'. Below the field is a blue link 'template'. A text block states: 'Download the template and add your asset information. Then attach the file below. The maximum file size is 5 MB. Processing times can vary depending on file size.' Below this is a large light blue box containing a cloud icon with an upward arrow and the text 'Drag and drop or browse files' and 'Max upload: 5MB'. A red rectangle highlights this upload area. At the bottom left is a 'Create Group' button.

5.1.4 The portal validates the file format and shows a green arrow and line indicating the completion of the upload.

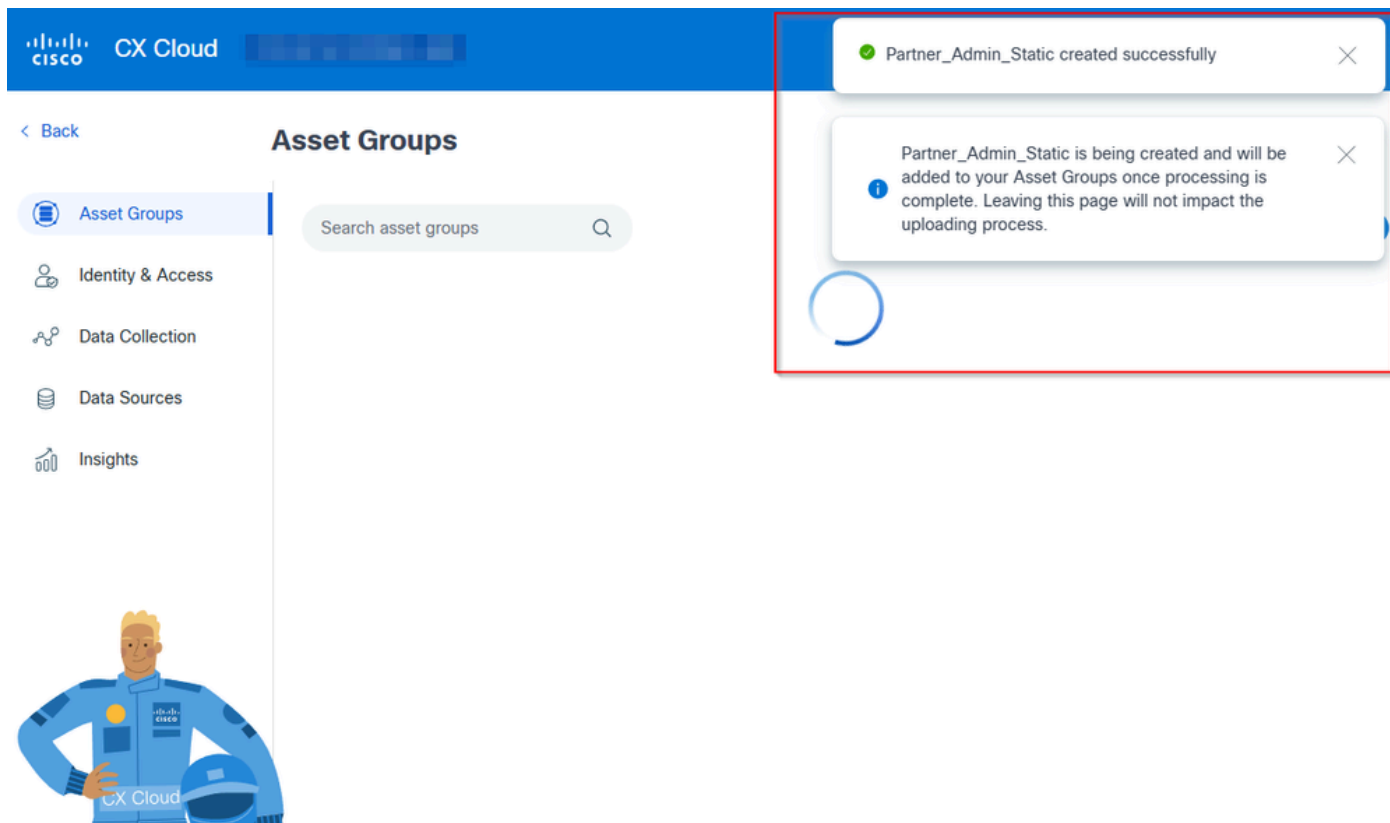
Click the **Create Group** button to proceed.



The screenshot shows the 'Create Static Asset Group' page in the Cisco CX Cloud portal. At the top is a blue header with the Cisco logo, 'CX Cloud', and navigation icons. Below the header is a '< Back' link. The main heading is 'Create Static Asset Group'. Underneath, there is a 'Group Name' field with a red asterisk, containing the text 'Partner_Admin_Static' and a character count '20/200'. Below this is a message: 'Download the [template](#) and add your asset information. Then attach the file below. The maximum file size is 5 MB. Processing times can vary depending on file size.' A light blue box with a cloud icon and a slash contains the text: 'You've Reached Your File Limit. Remove an existing file to add a new one.' Below this, a file upload section shows a green checkmark icon, the filename 'asset-group-template.csv', the status 'Completed', and a 'Delete' link. A green progress bar is at the bottom of this section. At the very bottom, the 'Create Group' button is highlighted with a red rectangular border.

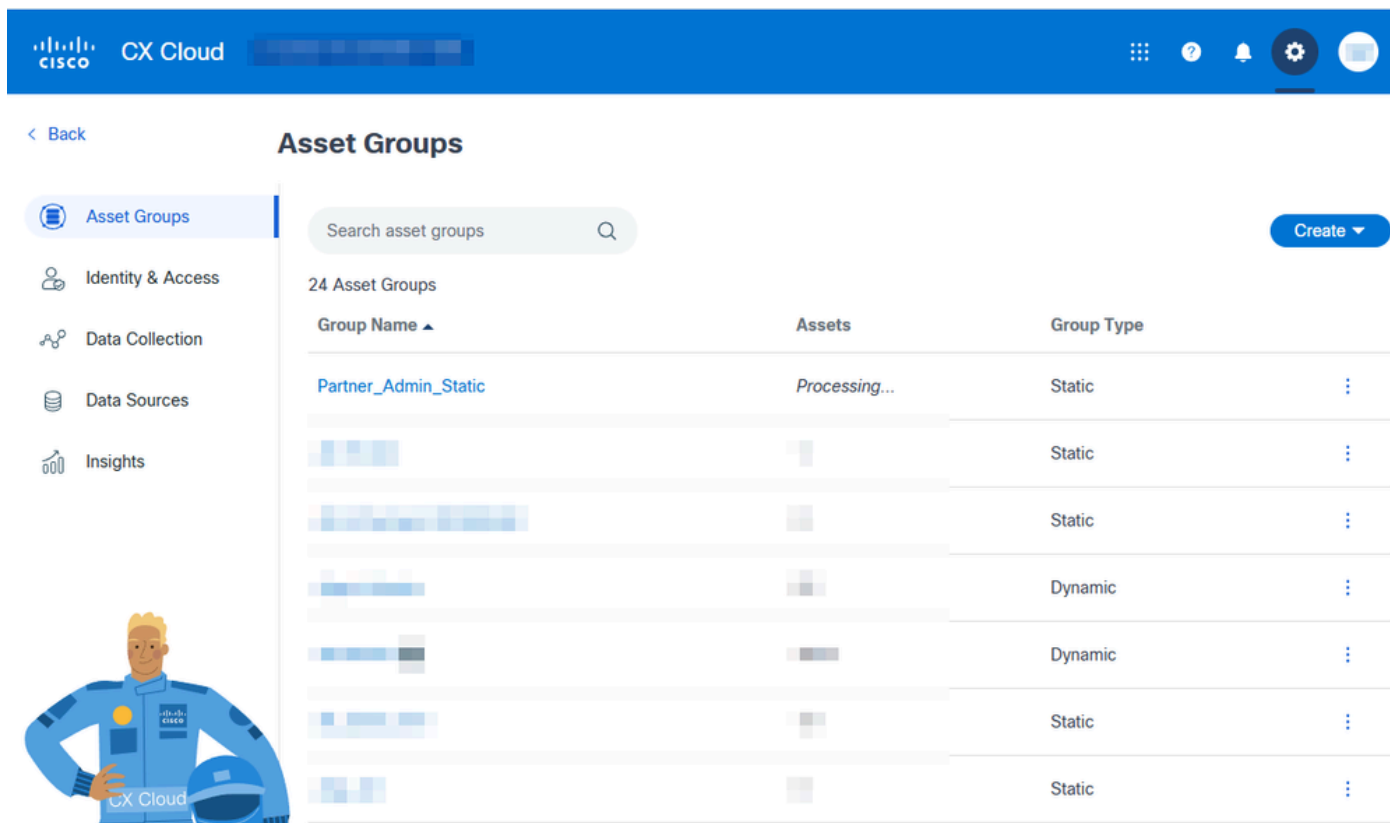
Create Group Button Used for Creating a Static Asset Group

5.1.5 The portal redirects to the **Asset Groups** menu and shows messages informing of the progress of the creation.



Messages Informing About the Progress of the Group Creation

5.1.6 The group shows up afterwards on top of the others with the text "Processing..." under the amount of assets. It is updated once the processing finishes.



Group Processing

5.1.7 Once processing is finished, the group displays the assets added to it. If there are multiple groups on

the portal, consider searching the asset groups to find yours.

CX Cloud

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Note: A description can be added. It is optional and recommended for easier management of the groups later on.

[< Back](#)



Create Dynamic Asset Group

Group Name *

Partner_Admin_Dynamic

21/200

Description (optional)

Assets to be managed by the Partner

Next

Create Dynamic Asset Group View

5.2.2. Next step involves creating rules with the Where _____ is _____. Fields that can be used to filter are:

- Location
- Product Type
- Product ID
- Product Family
- Contract Number
- Managed By
- Software Type

Each modifies the options available on the is _____ part of the rule.

[< Back](#)

Partner_Admin_Dynamic

Add Rule

Save Group

Where

Select option ^

Location

Product Type

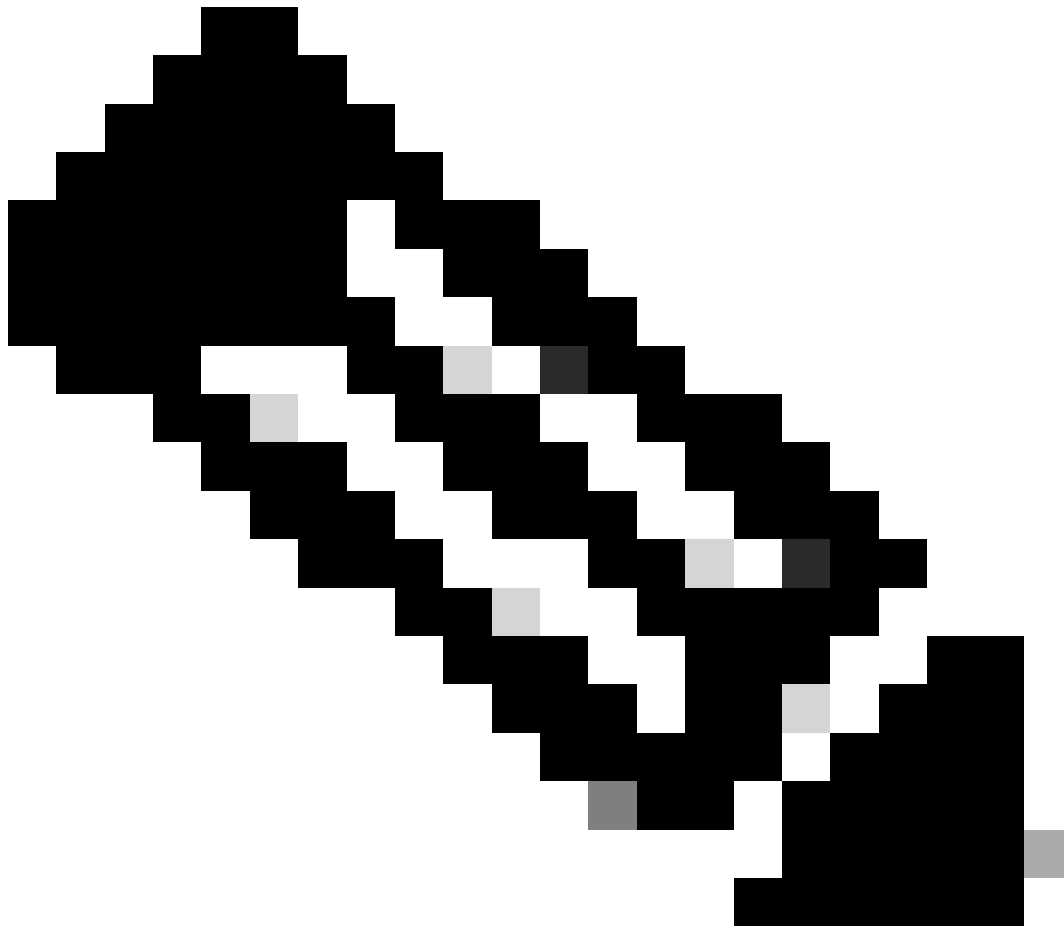
Product ID

is

Select option v

Dynamic Group Rules View

5.2.3 A SUA can add more rules if needed. For further filtering, click the **Add Rule** button. Once a rule is created the group can be saved by clicking the **Save Group** button.



Note: The rule in this example includes all product types available. It has all devices selected.

CISCO CX Cloud

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Partner_Admin_Dynamic

Add Rule Save Group

Where Product Type is 14 selected

- Cloud and Systems Management
- Collaboration Endpoints
- Data Center Switches
- Optical Networking
- Routers
- Security
- Servers - Unified Computing
- Storage Networking
- Switches
- Virtual Networking
- Wireless
- Video
- Universal Gateways and Access Servers
- Unified Communications

Clear all

Rule with All Product Types Selected

5.2.4 The portal redirects to the **Asset Groups** menu and shows messages informing of the progress of the creation.

CISCO CX Cloud

Partner_Admin_Dynamic created successfully

Creating asset group: Partner_Admin_Dynamic.

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Asset Groups


Asset Groups

Search asset groups

Create

Identity & Access

Data Collection



Messages Informing About the Progress of the Group Creation

5.2.5 The group shows up afterwards on top of the others with the text "*Processing...*" under the amount of

assets. It is updated once the processing finishes.

5.2.6 Once processing is finished, the group displays the assets added to it. If there are multiple groups on the portal, consider searching the asset groups to find yours.

< Back

Asset Groups

part × Create ▾

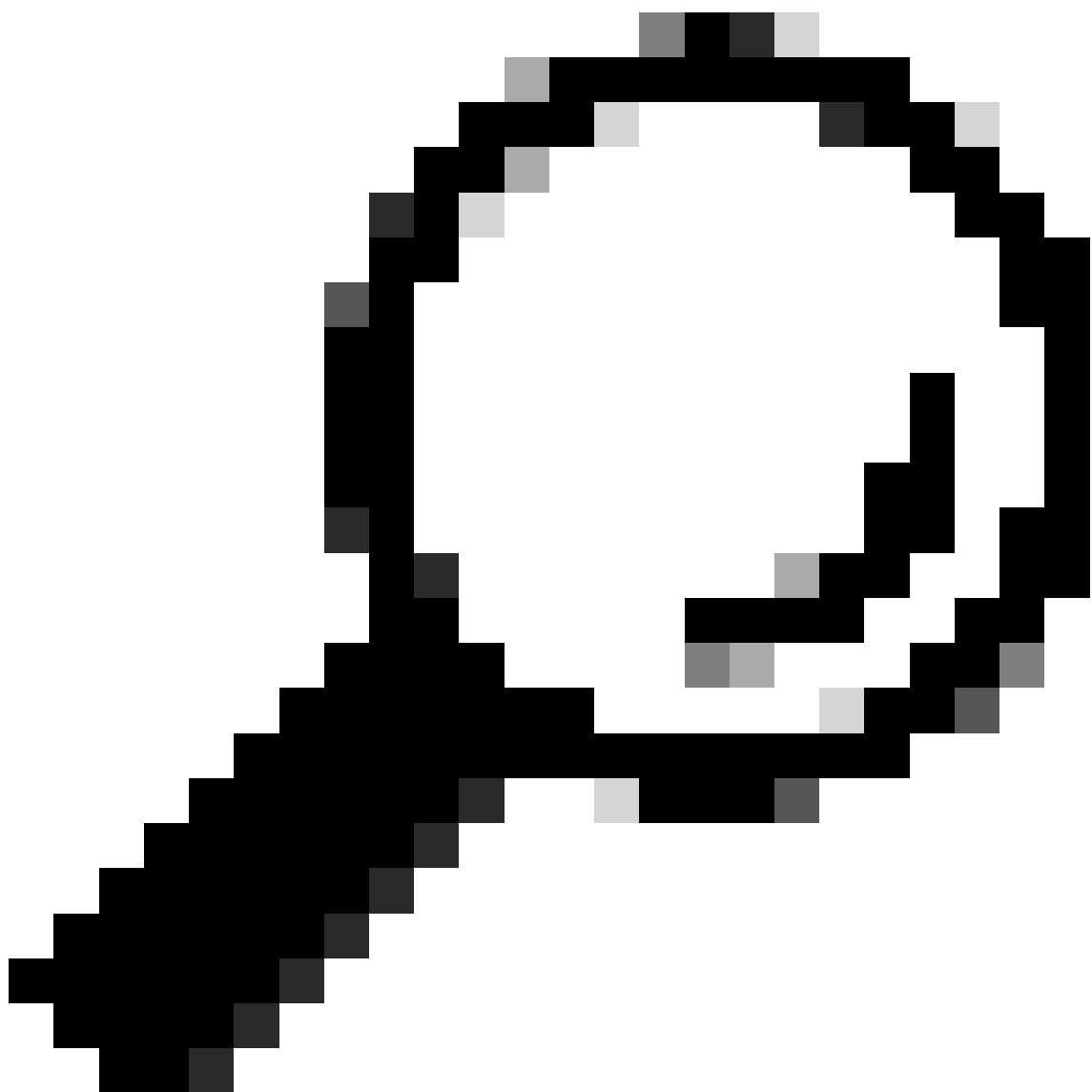
2 Asset Groups

Group Name ▲	Assets	Group Type
Partner_Admin_Dynamic	4434	Dynamic ⋮
Partner_Admin_Static	5	Static ⋮

Dynamic Group Visible under Asset Groups View


Create a User Group


1. Log in to [CX Cloud Portal](#) with a SUA.
2. Open the **Admin Center**.



Tip: It is the Gear/Cog icon on top, right corner.


-
3. Click **Identity & Access**.
 4. Click **Users** tab.
 5. Click **User Groups**.
 6. Click **Create User Group** button.


 CX Cloud





[< Back](#)


Identity & Access

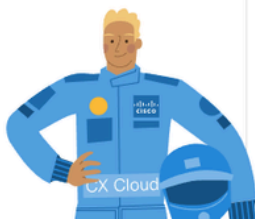
 Asset Groups

 Identity & Access


 Data Collection

 Data Sources

 Insights

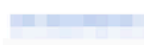











Rules **Users** Roles

Search user groups 

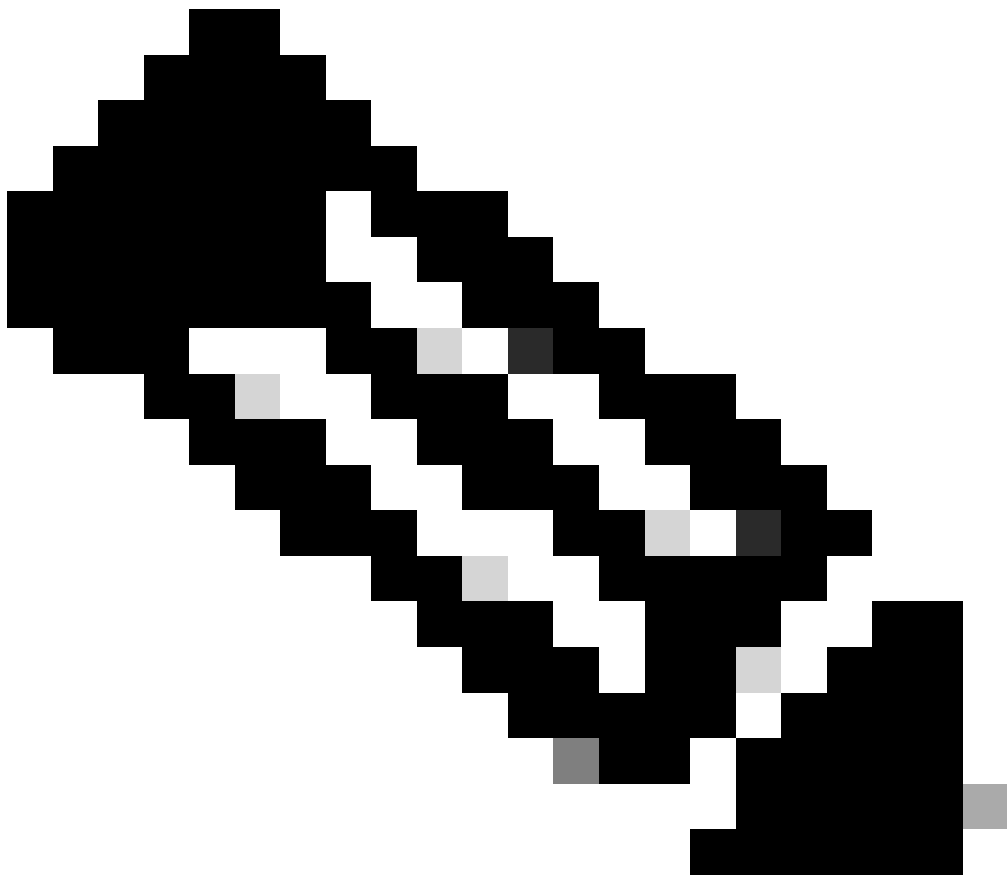
Users **User Groups** [Create User Group](#)

10 user groups

User Group ▲	Users
	<input type="checkbox"/>
	<input type="checkbox"/>
	<input type="checkbox"/>
	<input type="checkbox"/>
	<input type="checkbox"/>
	<input type="checkbox"/>
	<input type="checkbox"/>
	<input type="checkbox"/>
	<input type="checkbox"/>
	<input type="checkbox"/>

Identity & Access View

7. Name your group.
8. Select the **users** by clicking the **check-box** to the left.



Note: If the Partner is not a user yet, click **Add New User** button and complete the steps on screen.

9. Click the **Save** button.

Group Name

Partner_Admin_Users 19/200

0 of 59 users selected

Add New User

	Name	Email
<input type="checkbox"/>	[Redacted]	[Redacted]
<input type="checkbox"/>	[Redacted]	[Redacted]

Save

Create User Group View

- A message confirming the group creation is shown, the portal redirects to the **Identity & Access** view and the User Group is visible.

New user group added

Identity & Access

Rules Users Roles

Search user groups

Users User Groups Create User Group

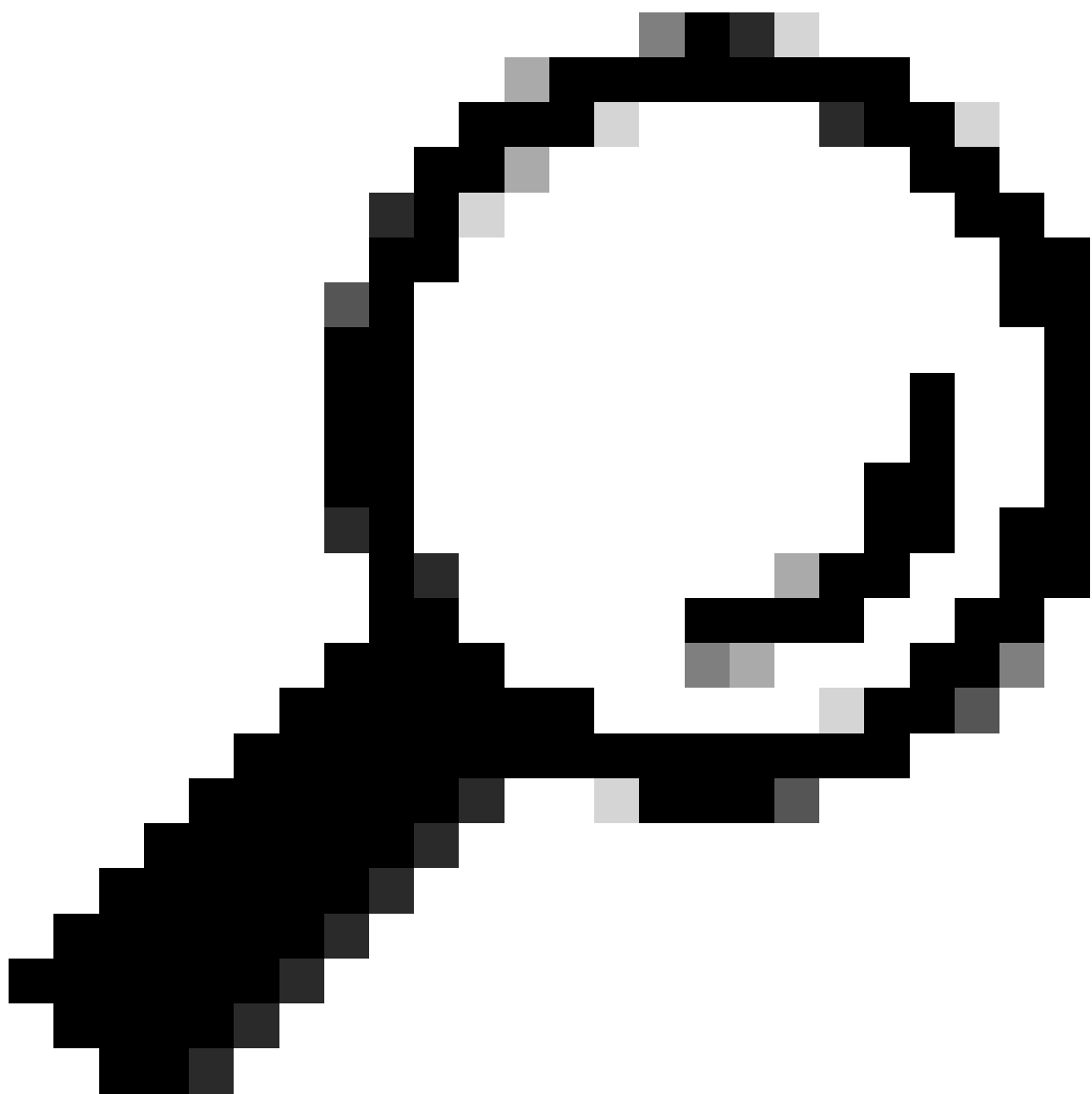
11 user groups

User Group	Users
[Redacted]	[Redacted]
[Redacted]	[Redacted]
[Redacted]	[Redacted]
[Redacted]	[Redacted]
[Redacted]	[Redacted]
[Redacted]	[Redacted]
[Redacted]	[Redacted]
[Redacted]	[Redacted]
[Redacted]	[Redacted]
[Redacted]	[Redacted]
[Redacted]	[Redacted]
Partner_Admin_Users	1

Messages and User Group visible under Identity & Access view

Create a Rule

- Log in to [CX Cloud Portal](#) with a SUA.
- Open the **Admin Center**.



Tip: It is the Gear/Cog icon on top, right corner.

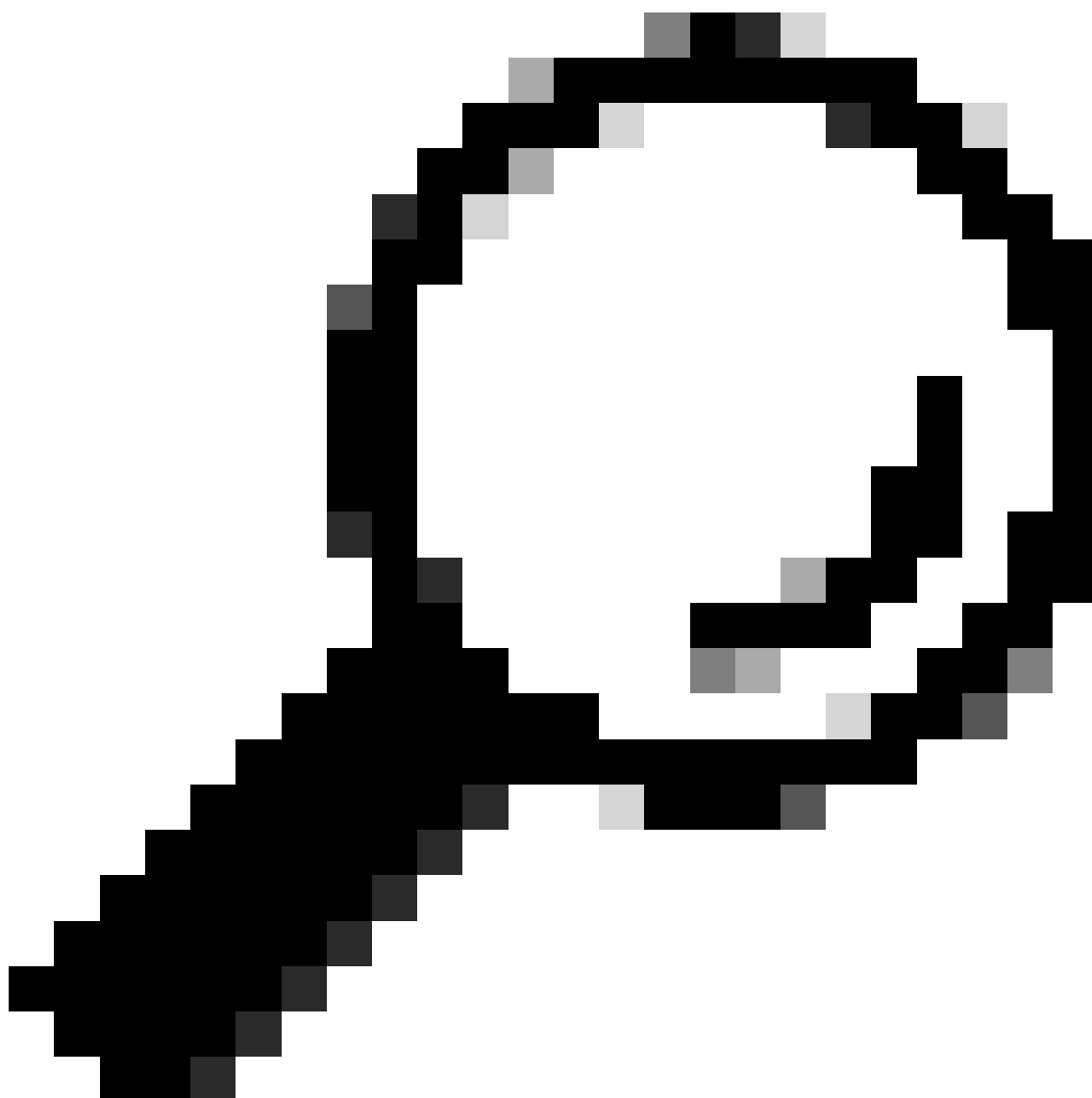
-
3. Click **Identity & Access**.
 4. Click **Create Rule** button.

12 rules

[illegible]

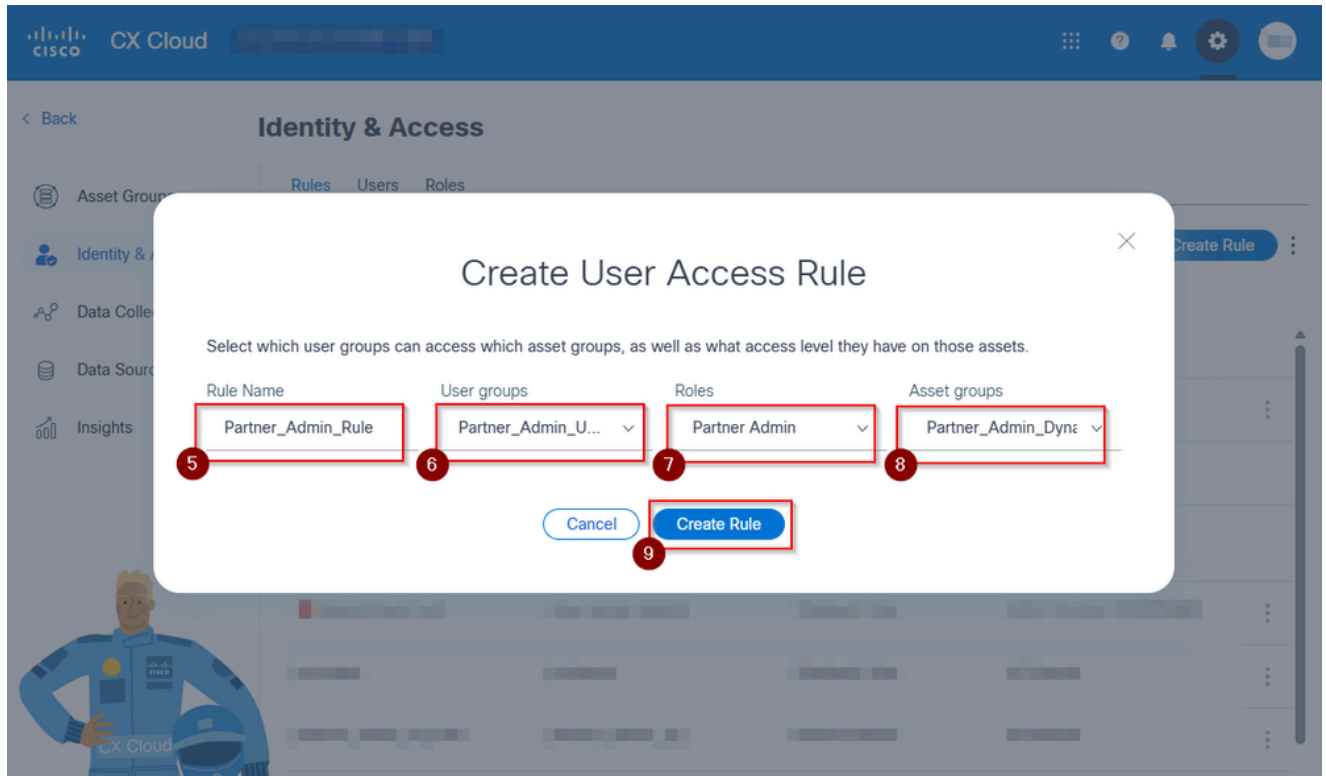
Identity & Access View Showing Rules

5. Name your rule.



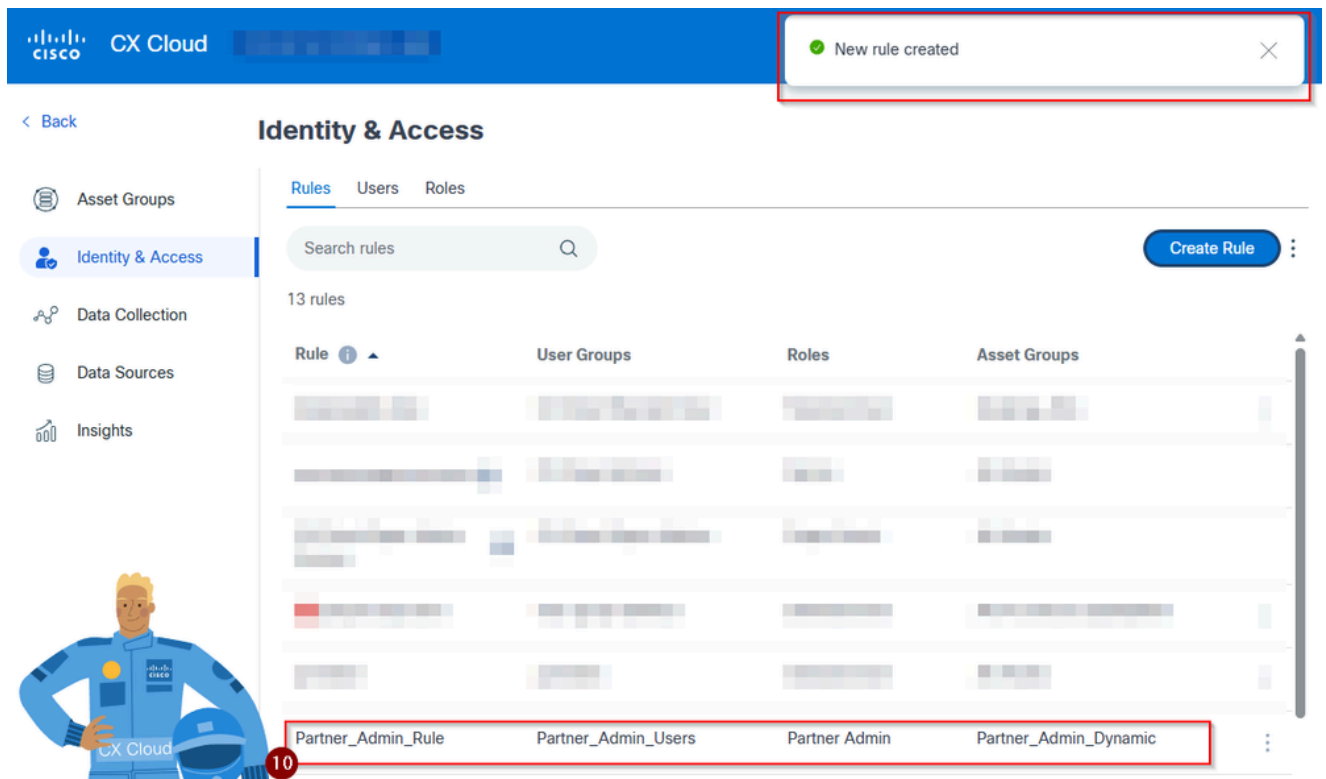
Tip: It is recommended to be descriptive, as rules can accumulate.

-
6. Select the **User Group** created previously.
 7. Select the **Role**. **Partner Admin** or **Partner User**.
 8. Select the **Asset Group** created previously.
 9. Click **Create Rule** button.



Create User Access Rule View

- The portal redirects to Identity & Access, and shows a message confirming the rule creation and is visible.

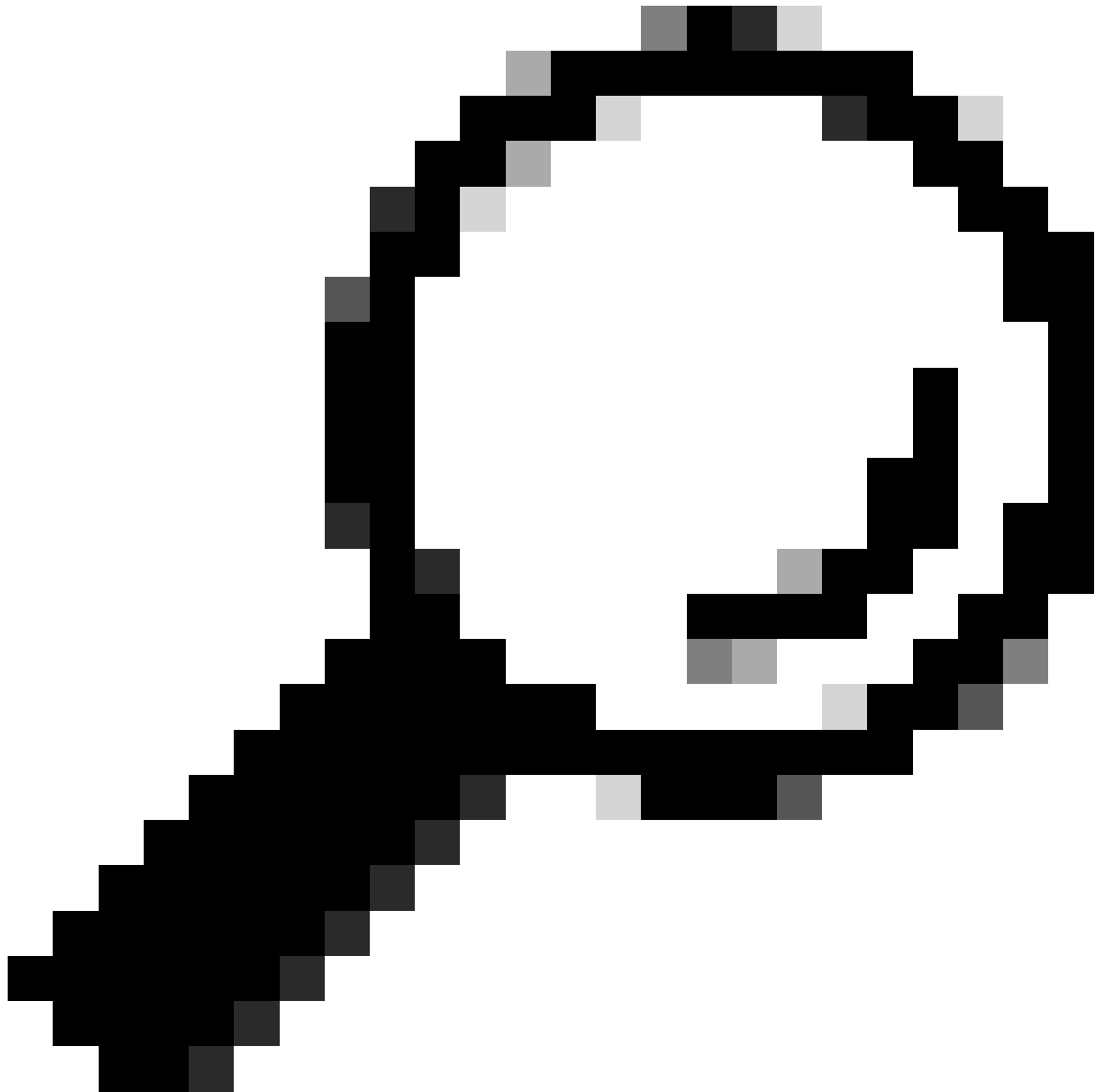


Rule Showing under Identity & Access

Verify

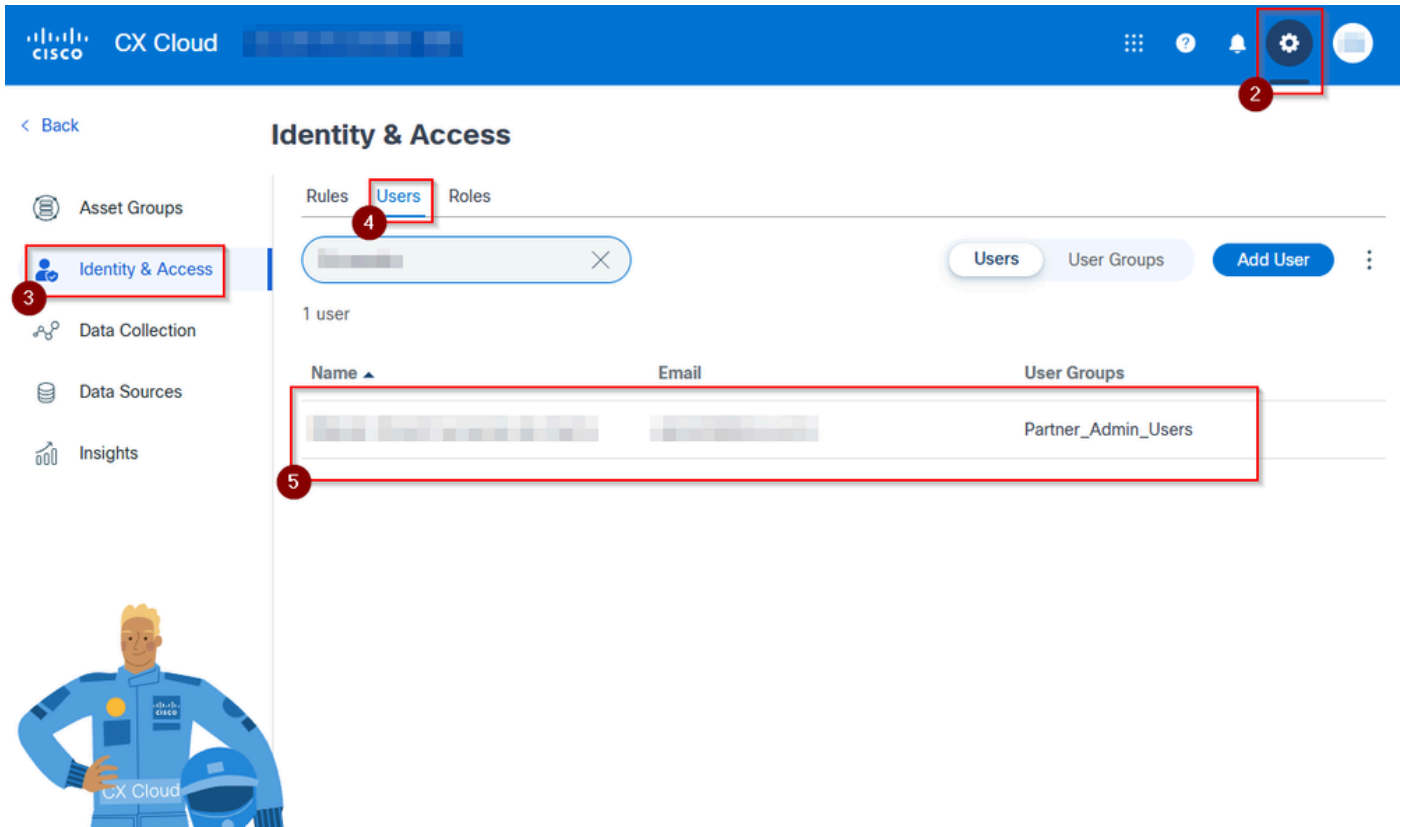
- Log in to [CX Cloud Portal](#) with a SUA.

2. Open the **Admin Center**.



Tip: It is the Gear/Cog icon on top, right corner.

-
3. Click **Identity & Access**.
 4. Click **Users** tab.
 5. Visually confirm the groups assigned to the intended user include the one just created.



User with Access as Partner Admin

Troubleshoot

If the Partner:

- Is unable to access the portal through [CX Cloud Portal](#) due to MFA or other log in error:

Please direct the user to open an inquiry on the [Web Help Portal](#).

- Gets a blank page, or gets the Platform Suite page

Verify the set up and ensure their user is assigned to a User Group with an applying Rule that allows them to get visibility over at least one asset. This can be done at a glance under **Admin Center > Identity & Access > Users** and clicking the **user** being troubleshooted.

If assistance is needed, feel free to open a case with TAC for configuration assistance. For reference on how to open the case from CX Cloud [here is a video tutorial](#).

You can click the ? sign and select the **CX Cloud Support**



Help

Quick Tours



CX Cloud Agent Overview

CX Cloud Overview

CX Cloud Guided Resources

CX Cloud Support

Opening a Support Case for CXCloud