

# Configure and Manage Asset Groups in CX Cloud

## Contents

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### [Introduction](#)

### [Prerequisites](#)

[Requirements](#)

[Components Used](#)

### [Background Information](#)

### [Configure](#)

[Display Asset Groups](#)

[Create an Asset Group](#)

[Create Static Groups](#)

[Create Dynamic Groups](#)

[Edit an Asset Group](#)

[Edit Static Groups](#)

[Edit Dynamic Groups](#)

[Delete an Asset Group](#)

### [Verify](#)

### [Troubleshoot](#)

### [Related Information](#)

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## Introduction

This document describes how to create, manage, and utilize Asset Groups in Cisco CX Cloud for device access and reporting.

## Prerequisites

### Requirements

Cisco recommends that you have knowledge of these topics:

- Navigation and usage of Cisco CX Cloud and SNTC Portal
- Familiarity with access control and compliance policy concepts

### Components Used

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

- Cisco CX Cloud platform (latest version at time of writing)
- Supported Cisco hardware assets managed within CX Cloud

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.

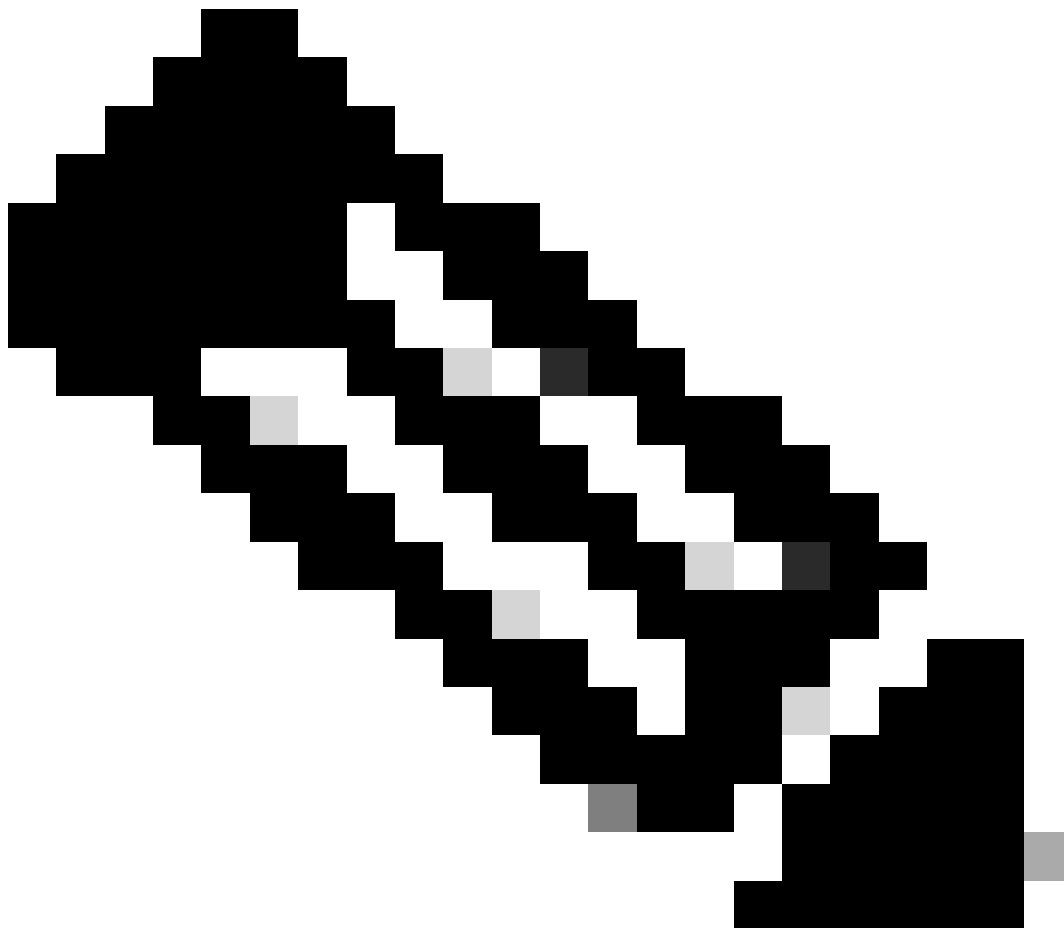
## Background Information

Asset Groups in Cisco CX Cloud (previously known as Segment Exclusions in SNTC Portal) provide a way to organize, manage, and control user access to device assets. Asset Groups serve several purposes:

- Enable granular access control for users based on assigned device groupings.
- Support compliance policies by enabling grouping of devices for audit and reporting purposes.
- Allow devices to be assigned to multiple asset groups for flexible management.
- Default Asset Group **All Assets** automatically includes all devices in the portal.

Asset Groups are visible in the **Assets & Coverage** tile, under **Assets > All Assets**. The Asset Group column can be displayed using the **More Options** icon and selecting **Hide / Show Columns > Asset Group**.

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**Note:** Devices not assigned to any Asset Group have no value in the Asset Group column.

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## Configure

## Display Asset Groups

These are the detailed steps to create a new Asset Group in CX Cloud:

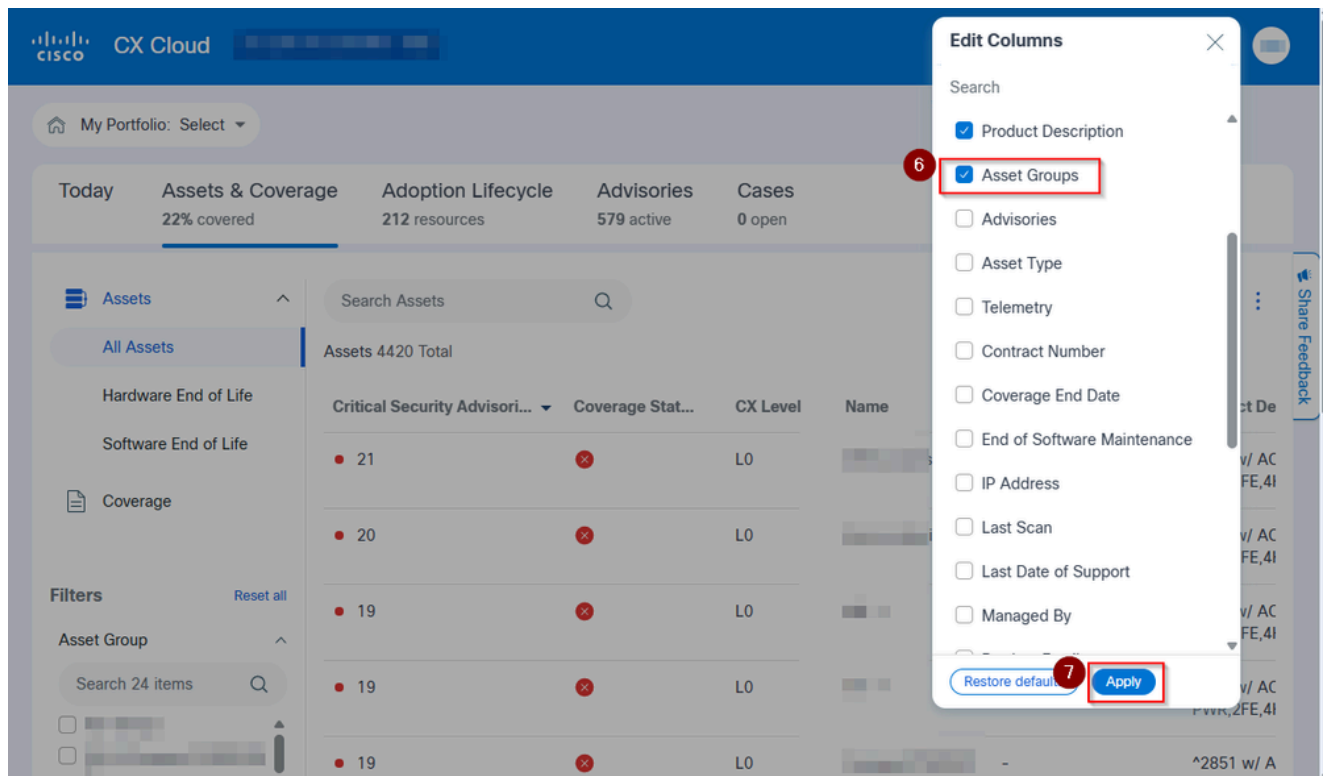
1. Log in to [CX Cloud Portal](#).
2. Click the **Assets & Coverage** tile.
3. Select **Assets > All Assets**.
4. Click the **More Options** icon (three vertical dots).
5. Click **Hide / Show Columns** to display the column.

The screenshot displays the CX Cloud portal interface. The top navigation bar includes the Cisco CX Cloud logo and a user profile icon. Below the navigation bar is a 'My Portfolio' section with tabs for Today, Assets & Coverage (22% covered), Adoption Lifecycle (212 resources), Advisories (579 active), and Cases (0 open). The main content area is titled 'Assets' and shows a list of assets. A sidebar on the left contains a 'Filters' section with an 'Asset Group' filter. A 'More Options' menu is open on the right, showing options like 'Export to CSV (Chassis Only)', 'Export to CSV (Chassis and Components)', and 'Hide / Show Columns' (highlighted with a red box). The asset list table has columns for Critical Security Advisory, Coverage Status, CX Level, Name, and a detailed description. The table shows 5 rows of assets, all with a coverage status of 'L0' and a '21' in the Critical Security Advisory column.

Critical Security Advisory	Coverage Stat...	CX Level	Name	
21	×	L0		PWR,2FE,4I
20	×	L0		2811 w/ AC PWR,2FE,4I
19	×	L0		2811 w/ AC PWR,2FE,4I
19	×	L0		2811 w/ AC PWR,2FE,4I
19	×	L0		2851 w/ A

*More Options Menu*

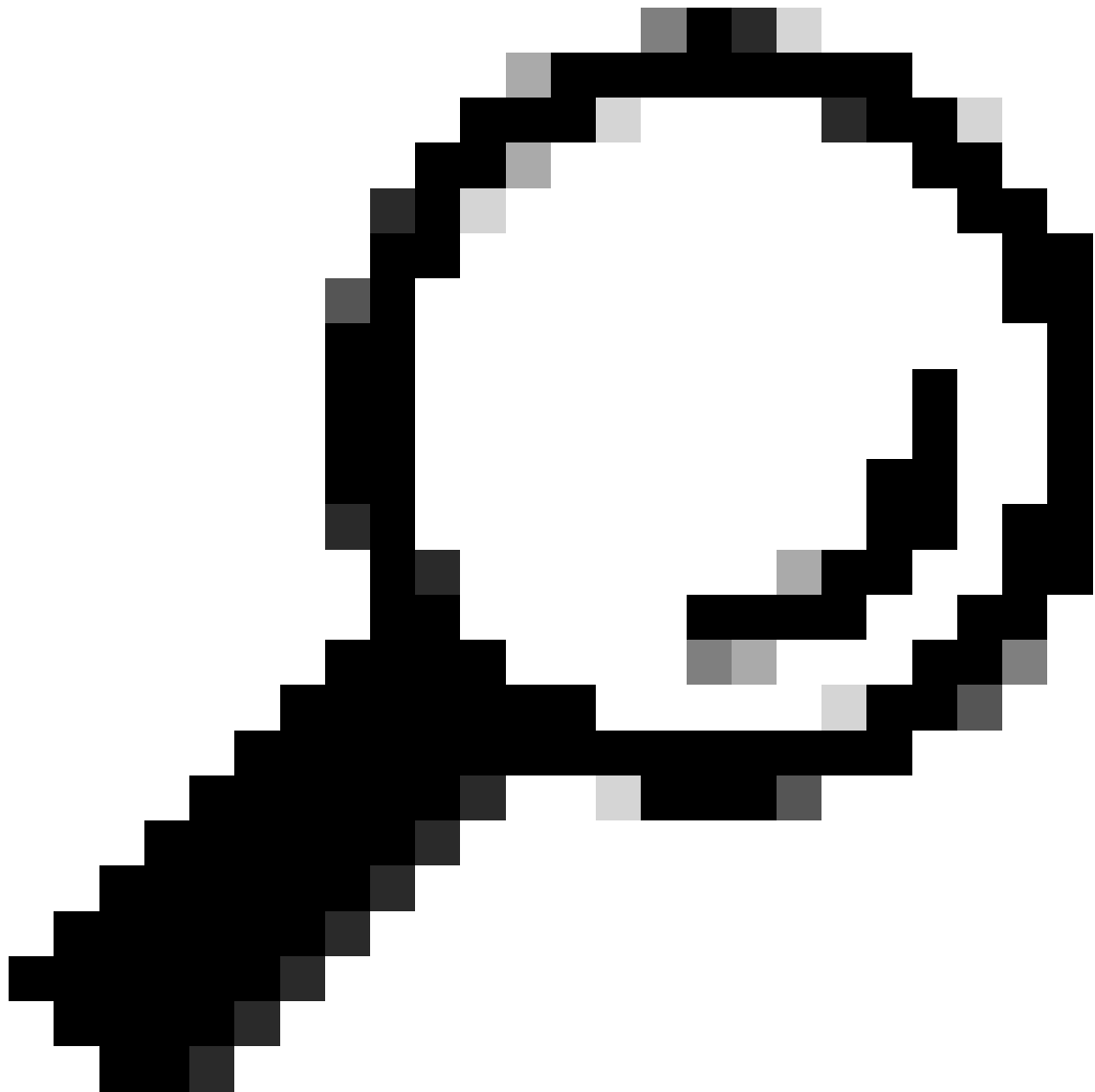
6. Check the **Asset Groups** checkbox.
7. Click the **Apply** button.



*Asset Groups Checkbox*

## Create an Asset 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 **Asset Groups**.
  4. Click **Create** button.
  5. Select whether you want a **Static** or a **Dynamic** group.

The screenshot shows the 'Asset Groups' page in the Cisco CX Cloud interface. The top navigation bar includes the Cisco logo, 'CX Cloud', and several utility icons. A red box with a '2' highlights the settings gear icon. On the left sidebar, a red box with a '3' highlights the 'Asset Groups' menu item. The main content area is titled 'Asset Groups' and features a search bar. Below the search bar, a table lists '24 Asset Groups' with columns for 'Group Name', 'Assets', and 'Group Type'. A red box with a '4' highlights the 'Create' button in the top right. A dropdown menu is open from the 'Create' button, showing two options: 'Dynamic Group' and 'Static Group from CSV File'. A red box with a '5' highlights the 'Static Group from CSV File' option. An illustration of a person in a blue uniform is visible in the bottom left corner of the main content area.

Steps to Create an Asset Group in CXCloud

## Create Static Groups

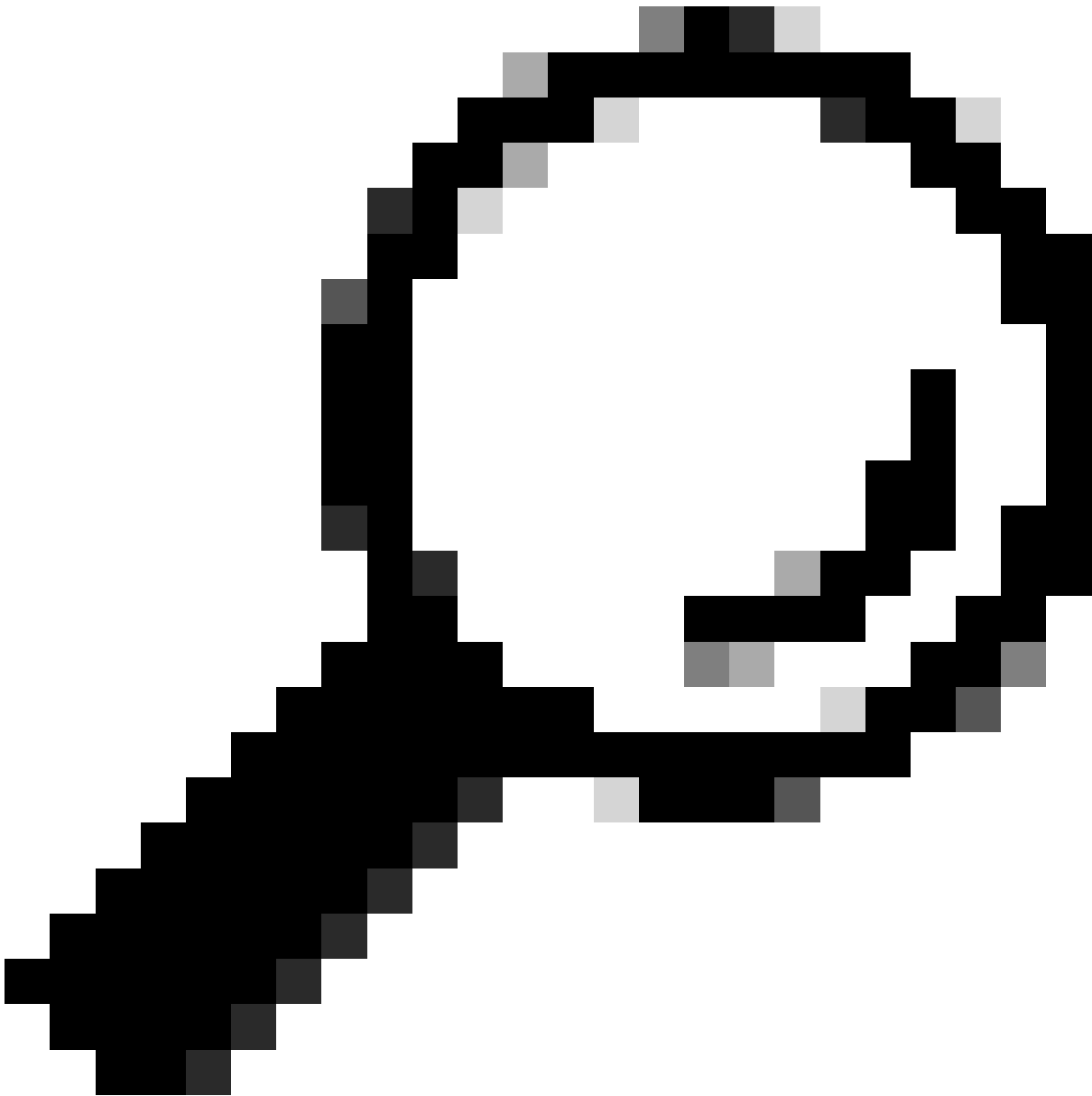
5.1.1 Static groups require the use of a template, available to download when creating the group by clicking the **template** text in blue.

The screenshot shows the 'Create Static Asset Group' form. The top navigation bar is the same as the previous screenshot. Below the navigation bar, there is a '< Back' link. The main heading is 'Create Static Asset Group'. Below this, there is a 'Group Name' field with a red asterisk indicating it is required. The field has a character count '0/200'. Below the field, there is a text block that reads: '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 text is a large light blue box containing a cloud icon with an upward arrow and the text 'Drag and drop or [browse files](#)'. Below this box is a 'Max upload: 5MB' label. At the bottom of the form is a 'Create Group' button.

Create Static Asset Group

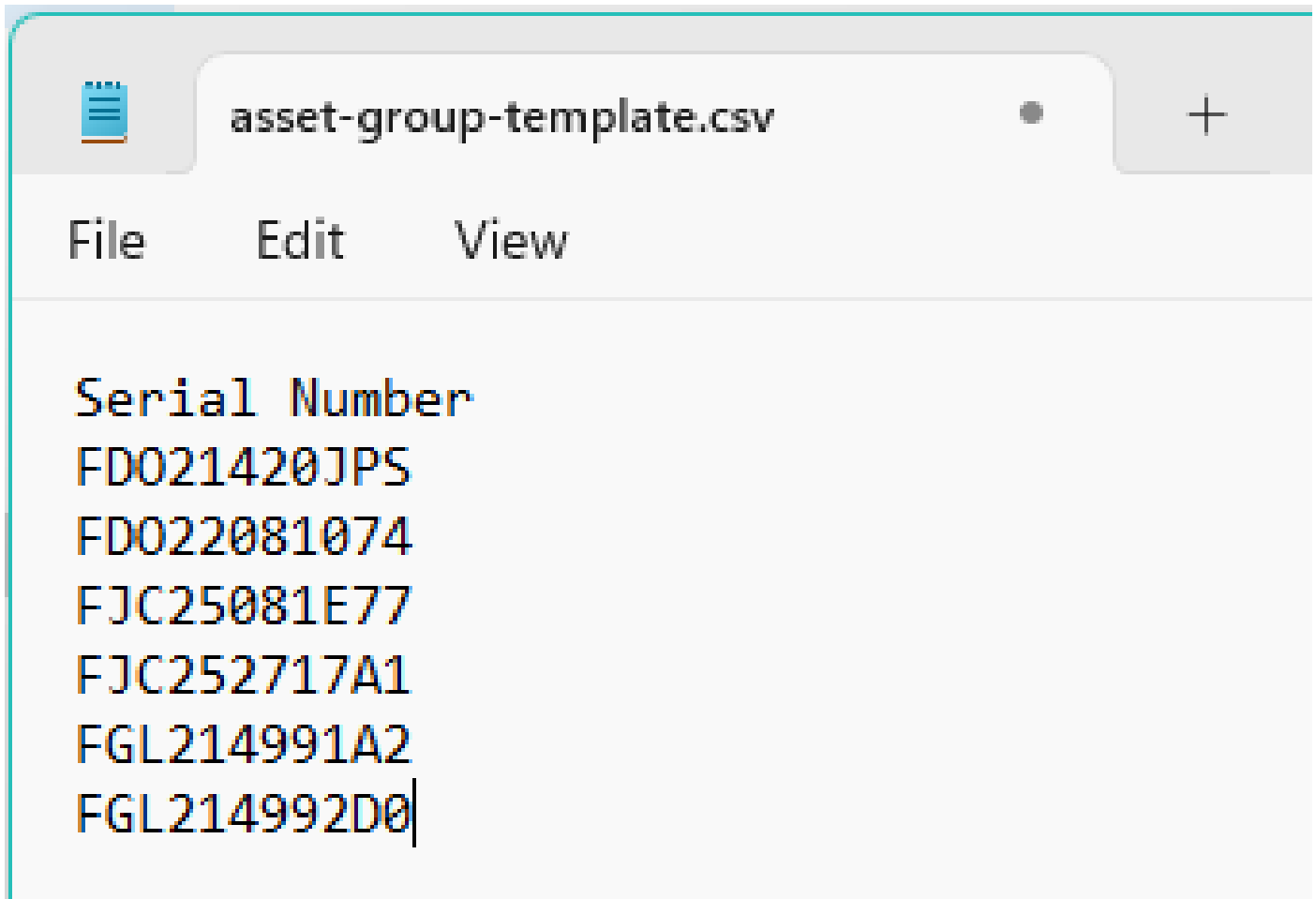
### 5.1.2 The template needs to be populated with Serial Numbers.

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

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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 'Asset\_Group\_Static' and a character count '18/200'. Below the field is a note: '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 large light blue box contains a cloud icon with an upward arrow and the text 'Drag and drop or [browse files](#)' and 'Max upload: 5MB'. At the bottom of the form is a 'Create Group' button.

Cisco CX Cloud

< Back

### Create Static Asset Group

Group Name \*  
Asset\_Group\_Static 18/200

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.

Drag and drop or [browse files](#)  
Max upload: 5MB

Create Group



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.

< Back

## Create Static Asset Group

Group Name \*

Asset\_Group\_Static

18/200

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.

You've Reached Your File Limit  
Remove an existing file to add a new one.

✓ asset-group-template.csv  
Completed

Delete

Create Group

Create Group Button Used for Creating a Static Asset Group

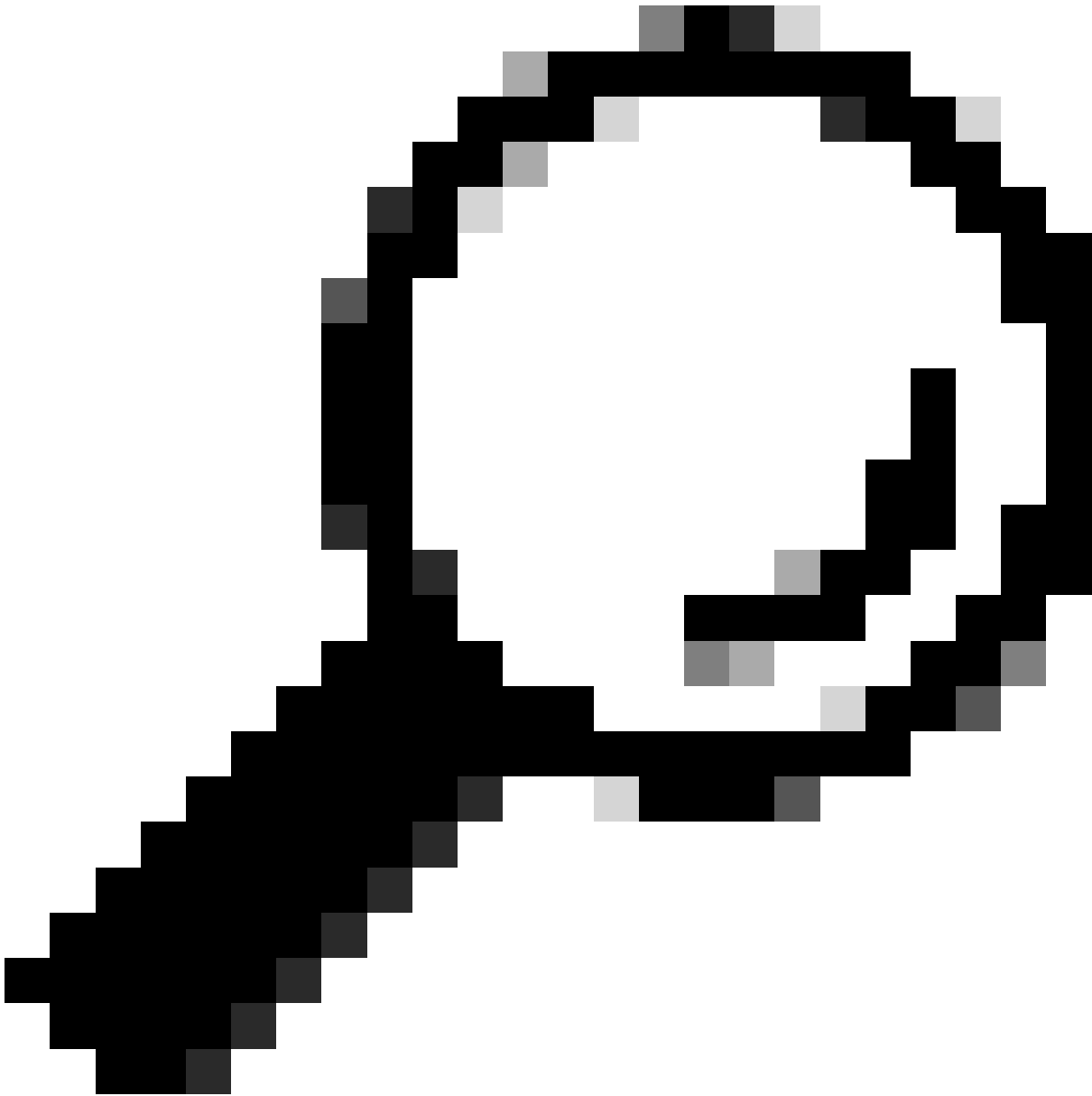
5.1.5 The portal redirects to the Asset Groups menu and shows messages informing of the progress of the creation.



## Create Dynamic Groups

5.2.1. Dynamic groups require a Group Name limited to 200 characters. Add a Group Name and click **Next**.

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

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[< Back](#)


## Create Dynamic Asset Group

Group Name \*

Asset\_Group\_Dynamic

19/200

Description (optional)

Asset\_Group\_Dynamic

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](#)

## Asset\_Group\_Dynamic

Add Rule

Save Group

Where

Select option
^

is

Select option
v

Location
Product Type
Product ID

*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 devices where Location is MIGUEL HIDALGO,CDMX,MEX.

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## Asset\_Group\_Dynamic

Save Group



is

N

—


→

Clear all

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

## Asset Groups

Q

 Insights

×

×

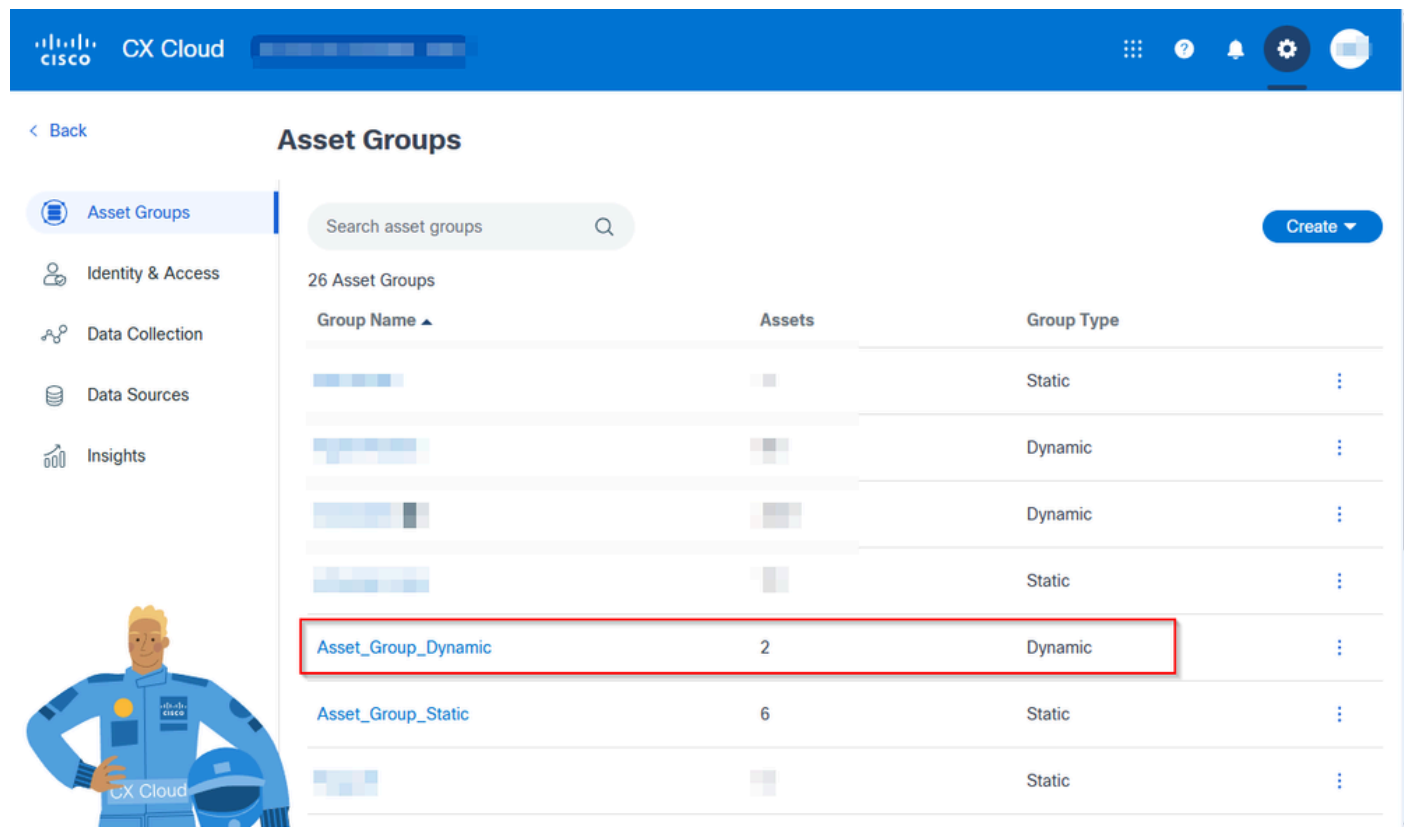
Create ▼



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.



The screenshot displays the Cisco CX Cloud interface. At the top, there's a blue header with the Cisco logo and 'CX Cloud' text. Below the header, a navigation sidebar on the left lists 'Asset Groups', 'Identity & Access', 'Data Collection', 'Data Sources', and 'Insights'. The main content area is titled 'Asset Groups' and features a search bar and a 'Create' button. A table lists 26 Asset Groups. The table has three columns: 'Group Name', 'Assets', and 'Group Type'. The 'Asset\_Group\_Dynamic' group is highlighted with a red box, showing it has 2 assets and is of type 'Dynamic'. The 'Asset\_Group\_Static' group is also visible, showing it has 6 assets and is of type 'Static'.

Group Name	Assets	Group Type
[Redacted]	[Redacted]	Static
[Redacted]	[Redacted]	Dynamic
[Redacted]	[Redacted]	Dynamic
[Redacted]	[Redacted]	Static
Asset_Group_Dynamic	2	Dynamic
Asset_Group_Static	6	Static
[Redacted]	[Redacted]	Static

*Dynamic Group Visible under Asset Groups View*

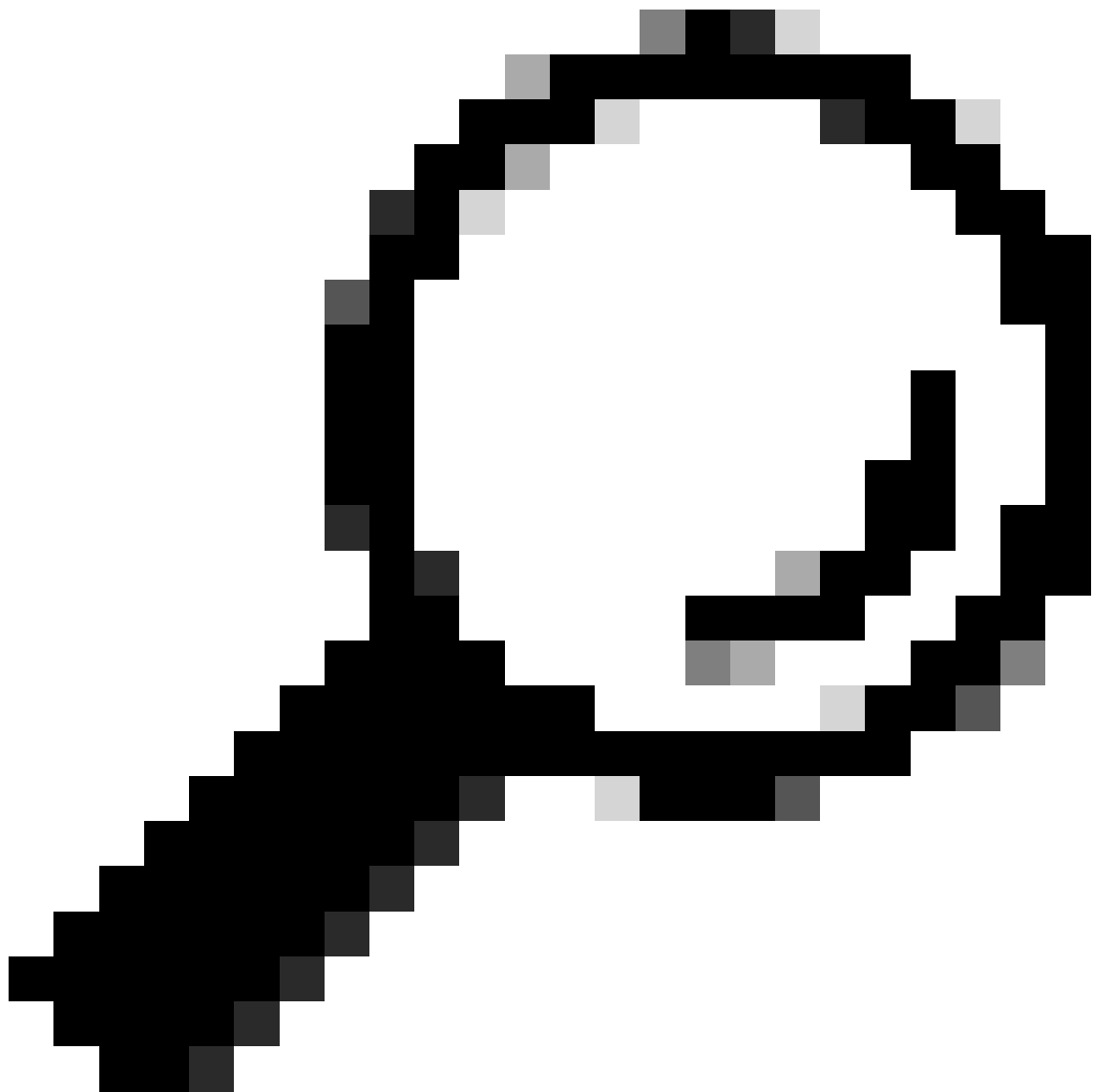
## Edit an Asset Group

To edit an existing Asset Group, these are the steps:

### Edit Static Groups

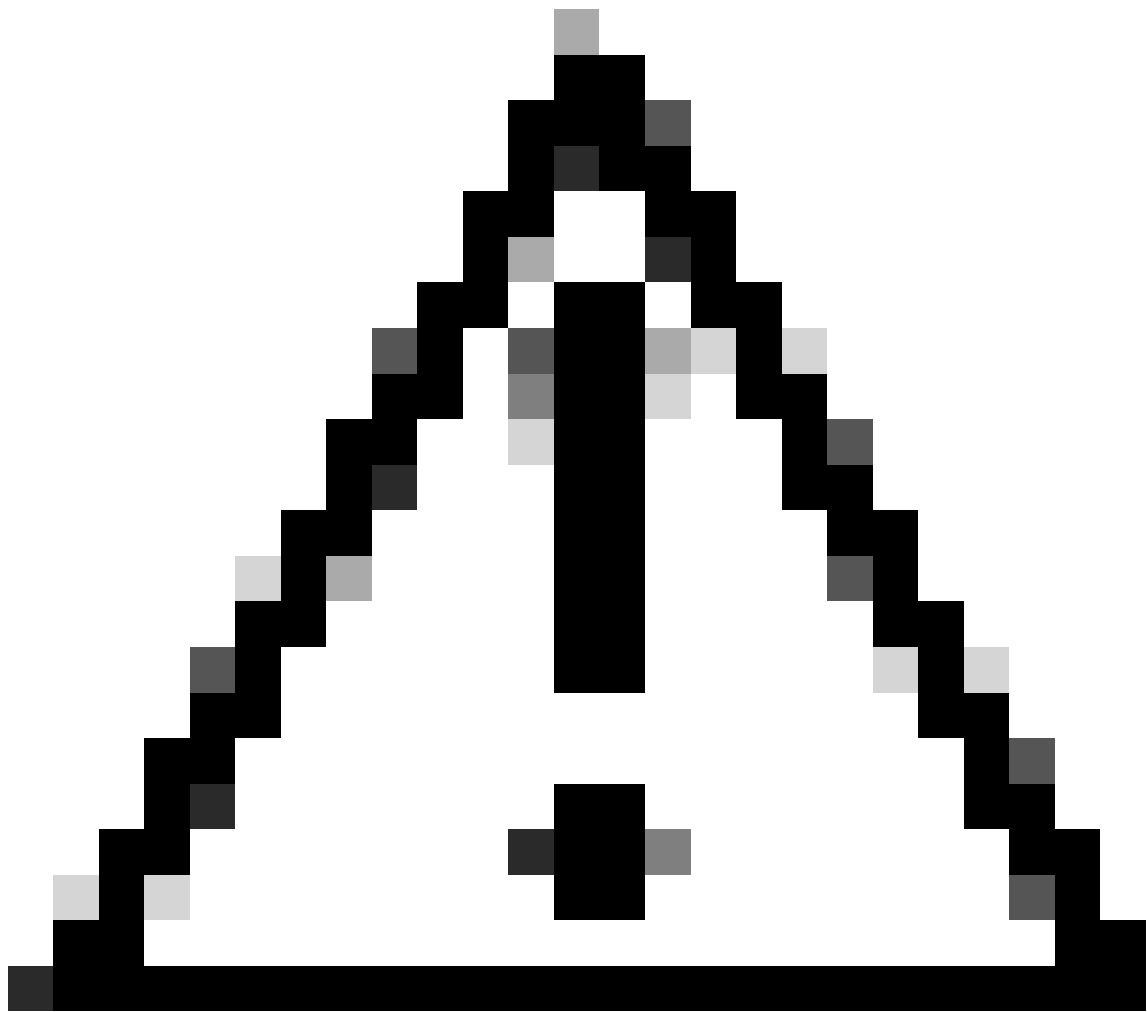
1. Log in to [CX Cloud Portal](#) with a SUA.
2. Open the **Admin Center**.





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

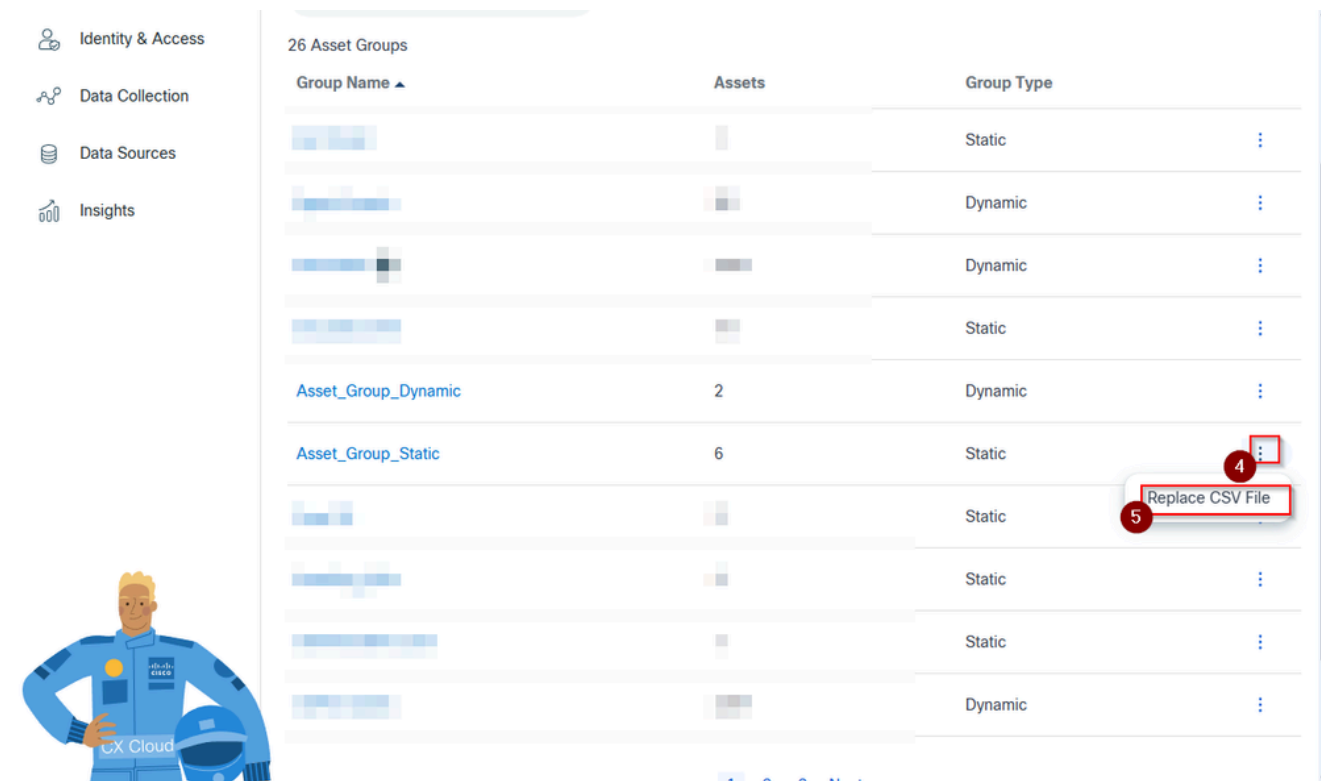
- 
3. Click **Asset Groups**.
  4. Click the **More Options** menu (three vertical dots).



**Caution:** Static Group names cannot be edited

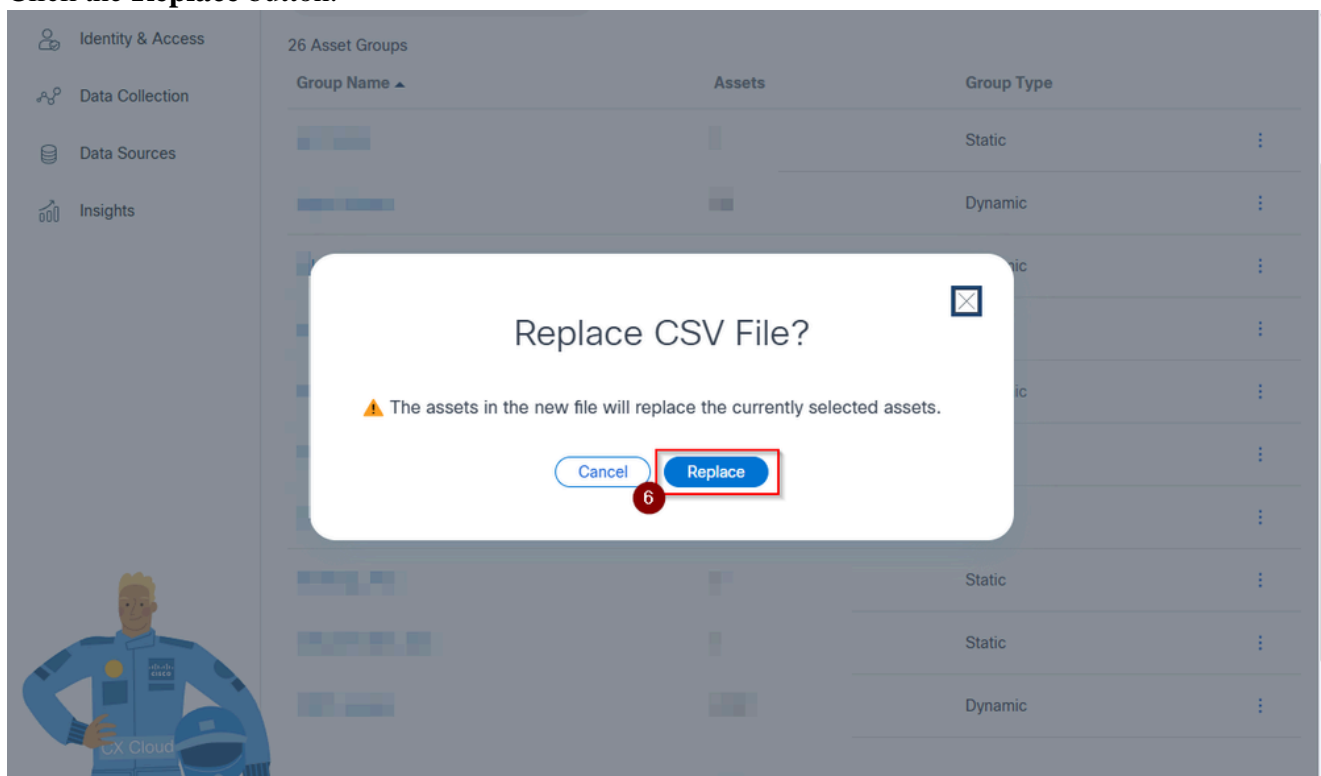
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5. Click **Replace CSV File.**



Three Vertical Dots Menu

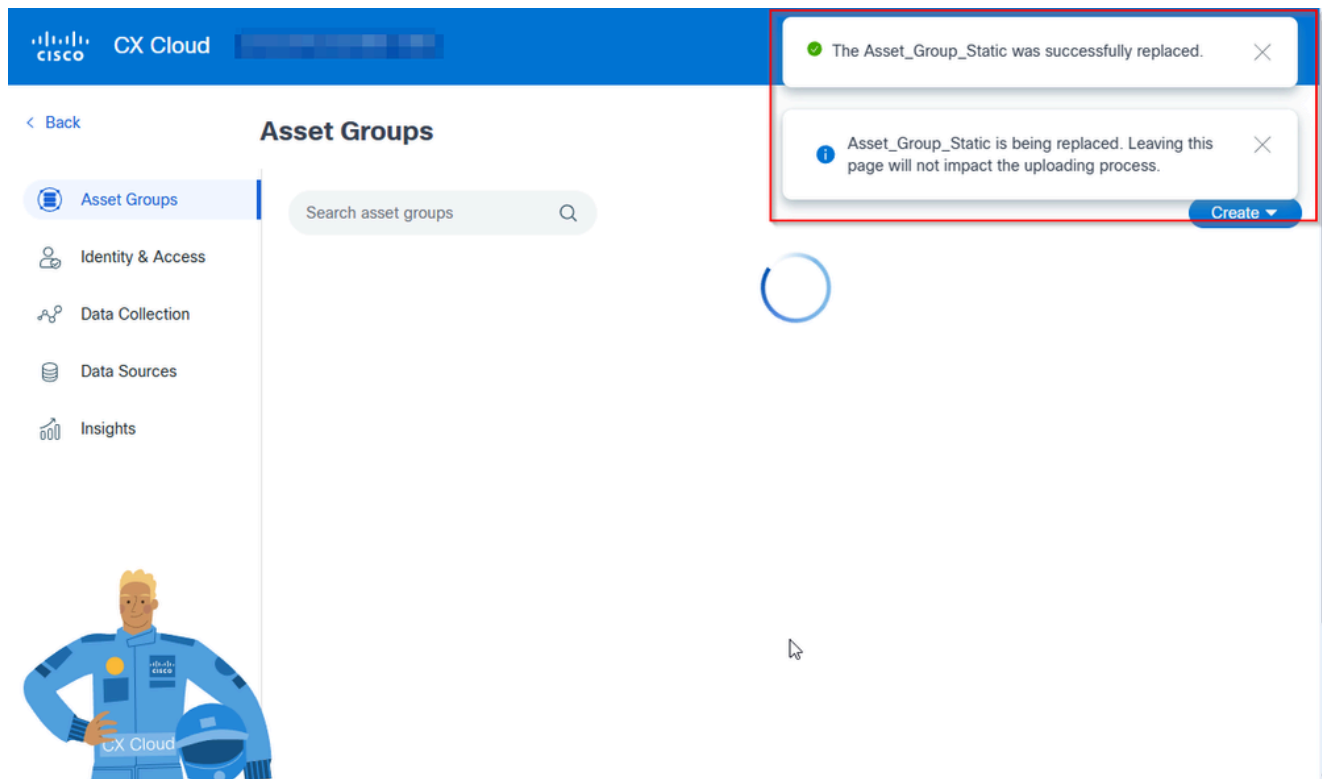
6. Click the **Replace** button.



Replace Button

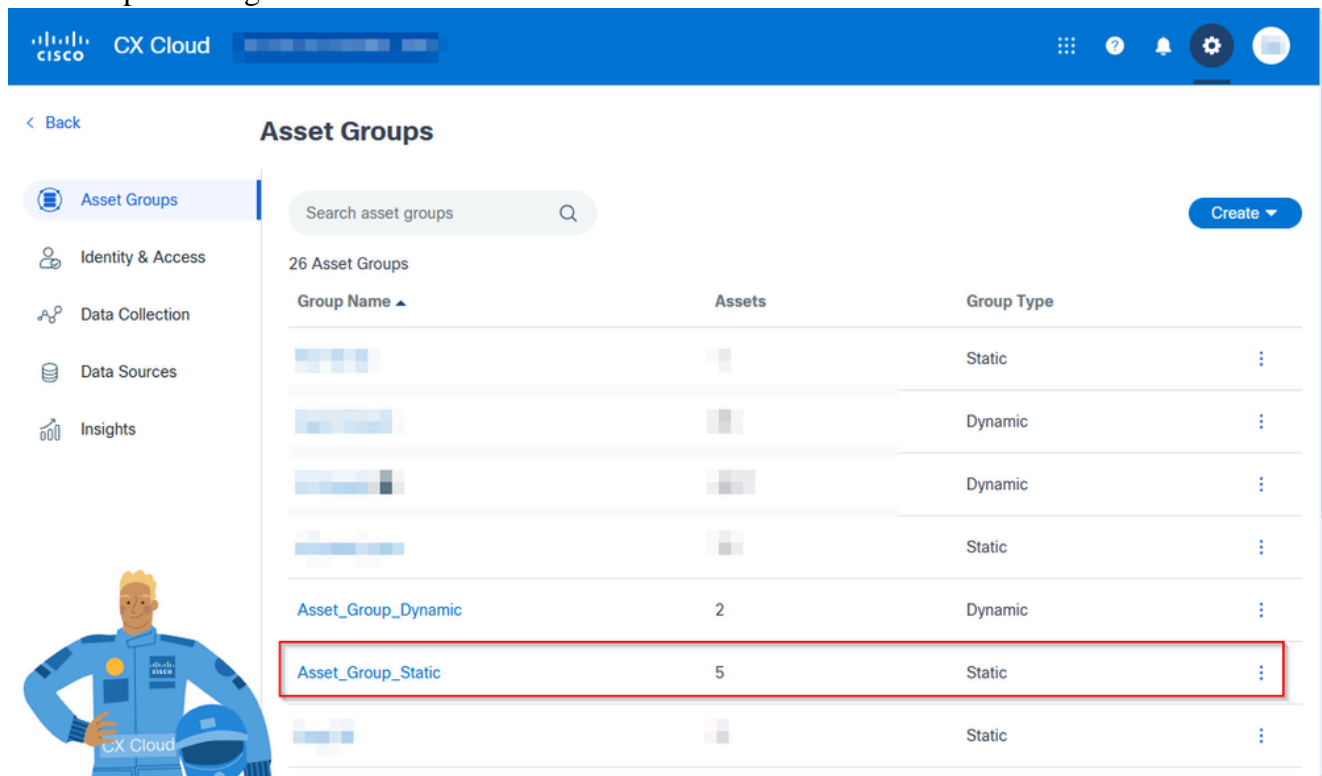
7. A similar screen to the one from step 5.1.3 Create Static Group shows up.





*Messages Informing the Progress of the Replacement*

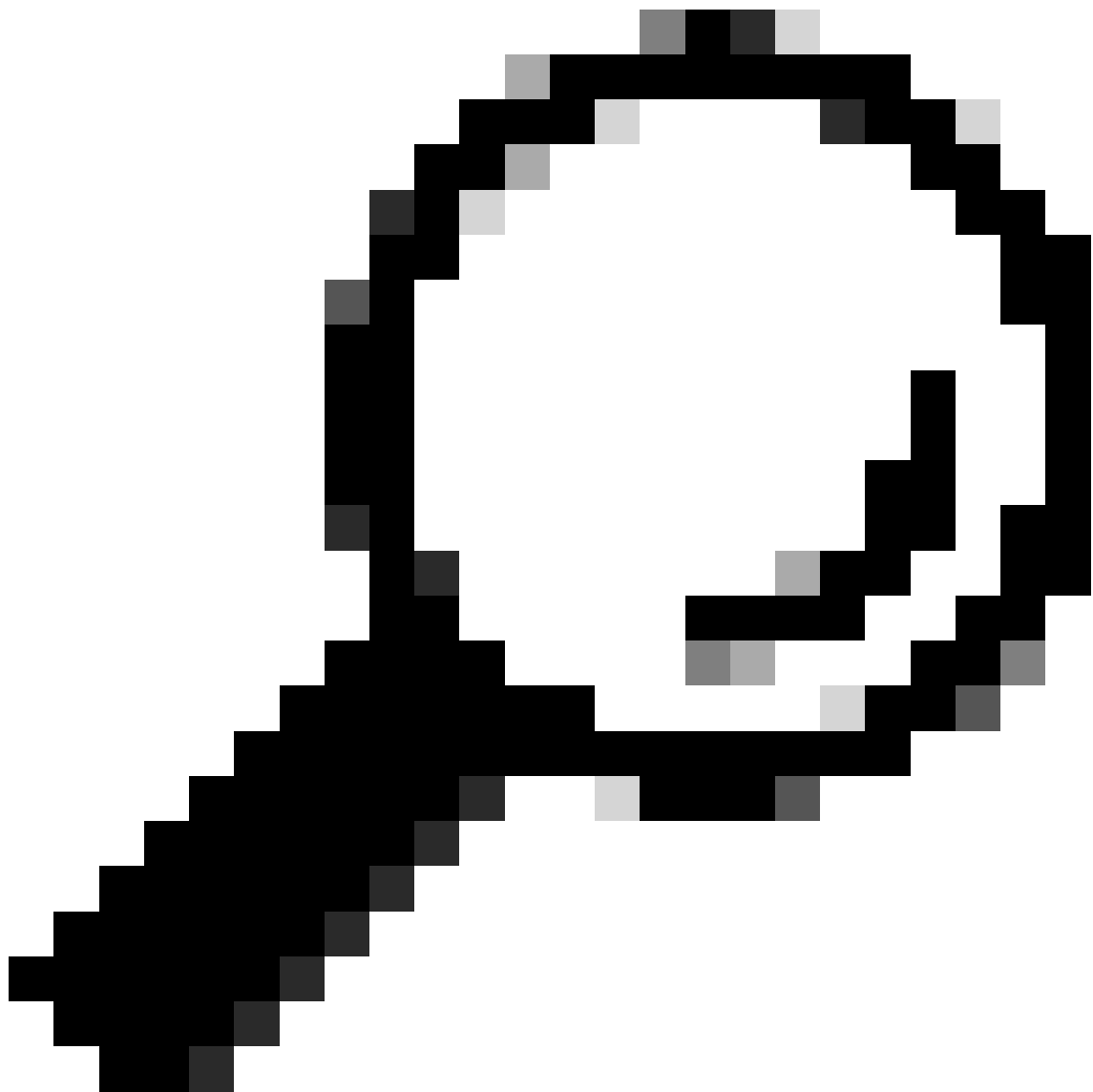
- The group shows up afterwards with the text "Processing..." under the amount of assets. It is updated once the processing finishes.



*Static Asset Group Updated*

## Edit Dynamic Groups

- 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 **Asset Groups**.
  4. Click the **More Options** menu (three vertical dots).
  5. Click the **Edit** button.

Asset Groups

Search asset groups

Create

26 Asset Groups

Group Name	Assets	Group Type
[Blurred]	[Blurred]	Static
[Blurred]	[Blurred]	Dynamic
[Blurred]	[Blurred]	Dynamic
[Blurred]	[Blurred]	Static
[Blurred]	[Blurred]	Dynamic
[Blurred]	[Blurred]	Static
[Blurred]	[Blurred]	Static

Edit Dynamic Asset Group

6. You are able to edit the **Group Name**, **Description**, and all other settings on the group.

Edit Dynamic Asset Group

Group Name \*

Asset\_Group\_Dynamic

19/200

Description (optional)

Asset\_Group\_Dynamic

Next

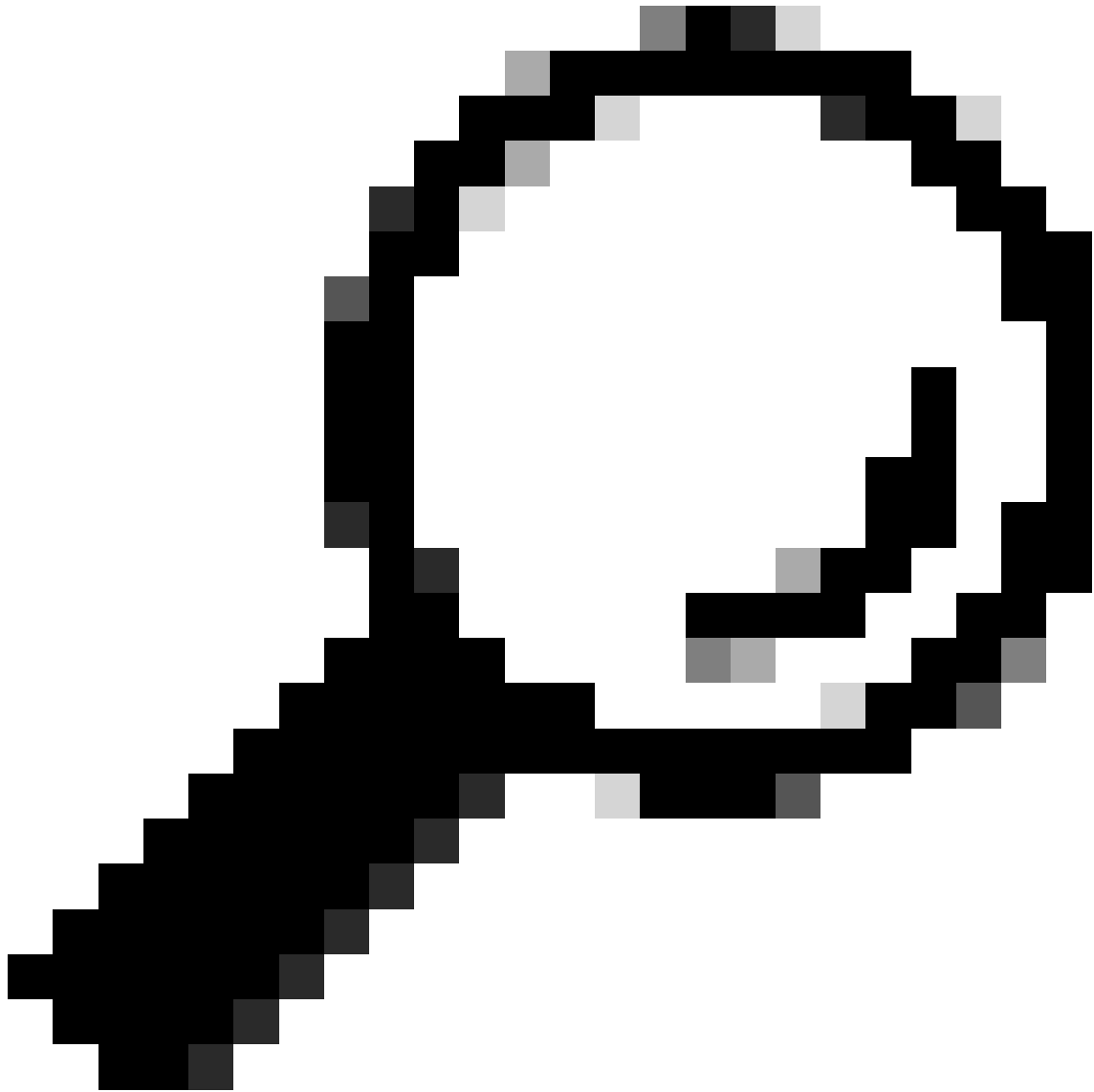
Editing a Dynamic Group

7. Read and comply with the instructions on screen. Steps 5.2.2 to 5.2.6 from the Create Dynamic Groups apply afterwards.

## Delete an Asset Group

To delete an existing Asset Group, these are the steps:

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 **Asset Groups**.
  4. Click the **Group Name** you want to delete.



Asset Groups

Group Name	Assets	Group Type
AC TG G2	1	Static
Agent Assets	88	Dynamic
All Assets	4437	Dynamic
all_asset_new	19	Static
Asset_Group_Dynamic	2	Dynamic
Asset_Group_Static	5	Static
Aug_24	0	Static

Asset Groups View to Delete a Group

5. Click the **Delete** button.

Asset\_Group\_Dynamic

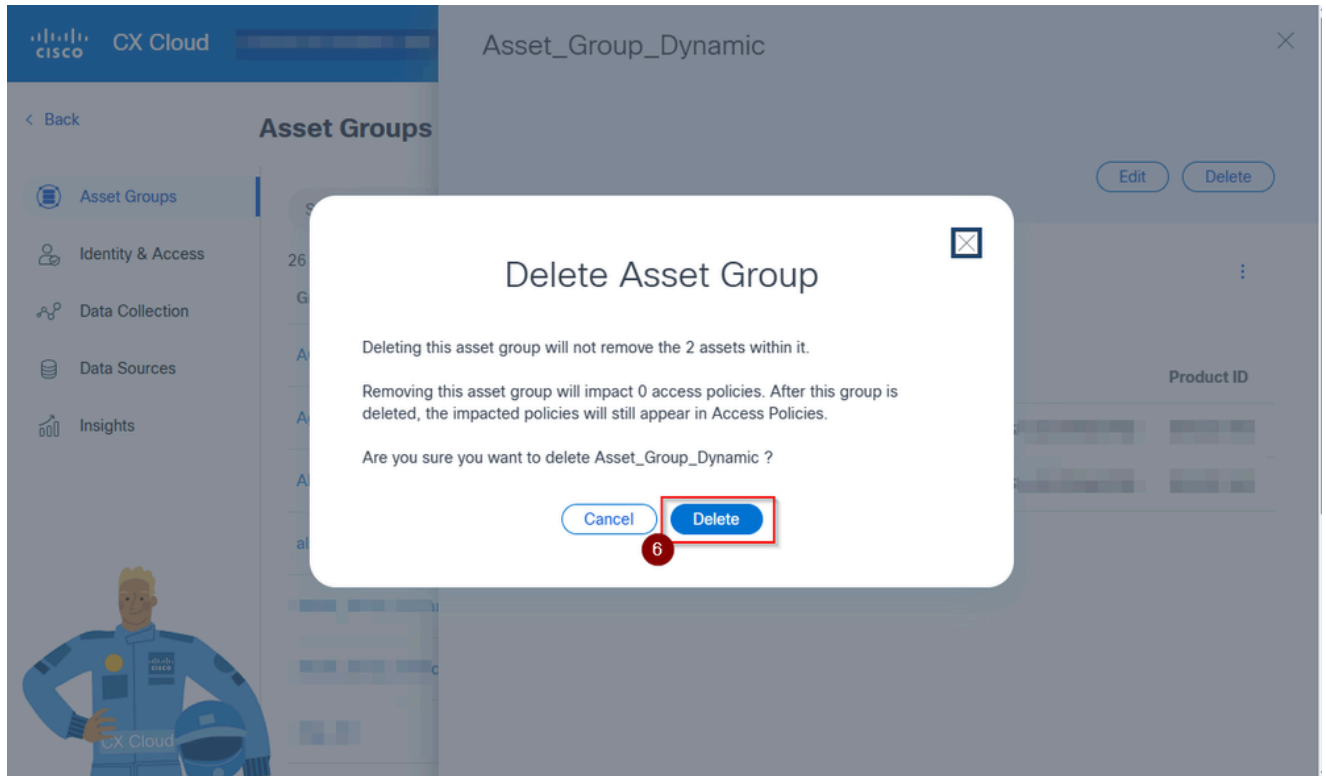
Search Assets

2 assets

Name	Description	Product ID

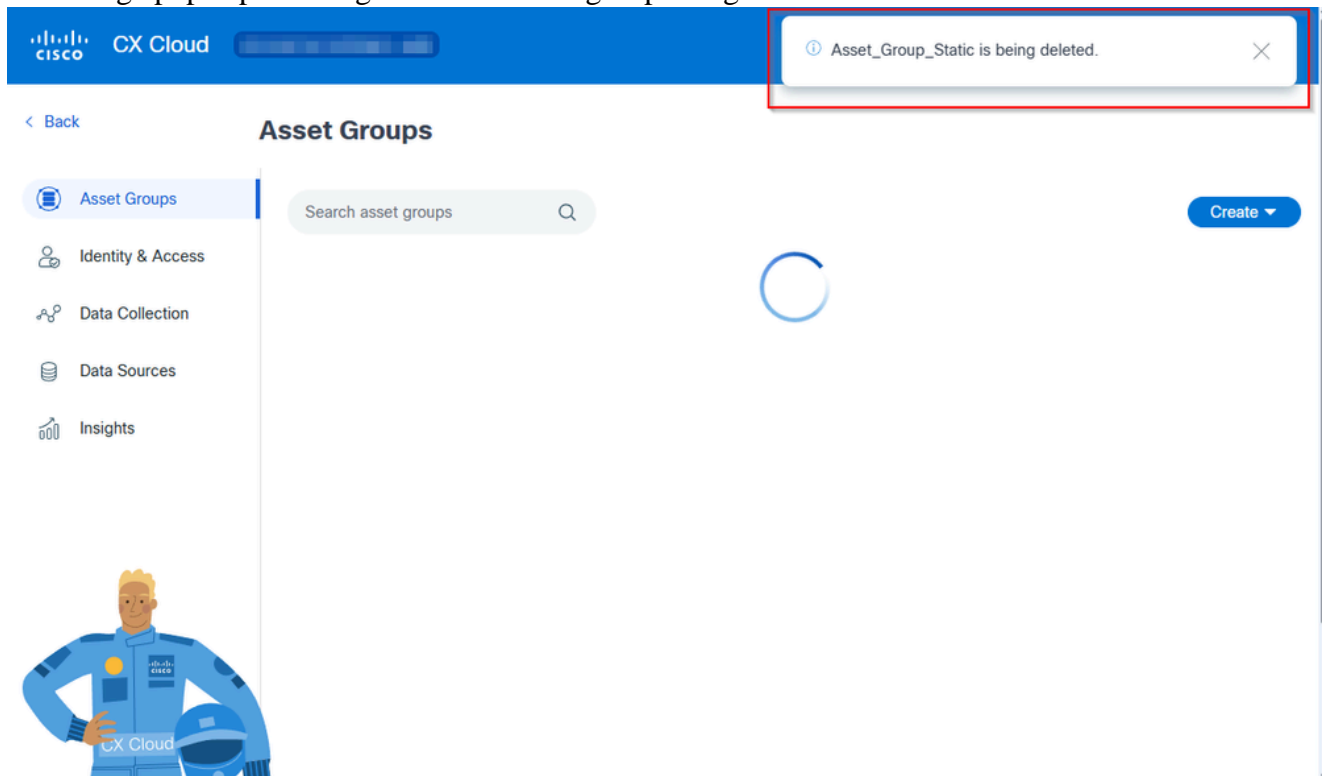
Delete Button

6. A notice pops up, summarizing the amount of devices the group has, and access policies the group deletion impacts. Click the **Delete** button to confirm.



*Delete Confirmation*

7. A message pops up showing the name of the group being deleted.



*Message Showing the Deletion Progress*

8. The portal redirects to the Asset Groups page, the group is not be visible.

## Verify

To verify the configuration and assignment of an Asset Group:

- Log in to [CX Cloud Portal](#) with a SUA. Navigate to **Admin Center > Asset Groups > Click the Group Name** to verify.

## Troubleshoot

These are the steps to troubleshoot common issues with Asset Groups:

### Asset Group Not Displayed

- Ensure that the Asset Group column is enabled via **More Options > Hide / Show Columns > Asset Group**.

### Devices Not Appearing in Asset Group

- Verify that devices were selected and assigned correctly during Asset Group creation or editing.

### Asset Group Changes Not Saving

- Confirm network connectivity and try saving changes again. If issue persists, contact Cisco support.

## Related Information

- [Cisco Technical Support & Downloads](#)
- [Open a Support Case in CX Cloud](#)