Partner Self Service
User Guide
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About this Guide

In this guide, you will find step-by-step instructions and reference information about how to use the Partner Self Service tool. In addition to an overview of the general processes and capabilities, the guide provides information for obtaining partner level access, for managing your information and for maintaining company data, access and associations. The Reports feature allows you to compile a report on the various aspects of your company and its partner status with Cisco.
Get Started with Partner Self Service

Partner Self Service is the convenient way to maintain your company, contacts, and location information. It gives you the ability to manage your Company information, Location details, and administer your Contacts for access association and proper communication about policies and program changes.

Log into Partner Self Service

You must have a valid Cisco.com user ID and password to log into Partner Self Service. To log in, go to: https://getlog.cloudapps.cisco.com/WWChannels/GETLOG/welcome.do
Creating a CCO User ID

To register for a Cisco.com User ID, go to:
https://idreq.cloudapps.cisco.com/idreg/register.do

You will receive an email confirming your registration. To obtain partner level access, you will need to associate your profile with a partner company. You can do this by selecting the URL provided in the email or by logging into Partner Self Service and following the steps to Associate Myself with a Company.
<table>
<thead>
<tr>
<th>User Type</th>
<th>Task(s) that can be Performed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Guest User</td>
<td>Associate Myself with a Company</td>
</tr>
</tbody>
</table>
| Partner User/Partner Administrator | My Profile  
Access Management  
Manage My Reward Programs            |
| Partner Administrator           | Company Details  
Location Management  
Contact Management  
Association Requests  
Accountable Contacts  
Reports  
Manage Corporate Email Domain  
Manage Global Administrator Access (Only for partner administrators of companies with global presence)  
Distributor Details (Only for Partner Admins of 2-Tier companies) |
<table>
<thead>
<tr>
<th>Associate Myself with a Company</th>
<th>My Profile</th>
<th>Access Management</th>
<th>Company Details</th>
<th>Location Management</th>
<th>Contact Management</th>
</tr>
</thead>
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<td>Manage Global Administrator Access</td>
<td>Accountable Contacts</td>
<td>Manage My Reward Programs</td>
<td>Manage Corporate Email Domain</td>
<td>Distributor Details</td>
</tr>
</tbody>
</table>

Associate Myself with a Company (Guest User Only)
1. Click on task “Associate Myself with a Company” menu option

2. Fill in the details

3. Click on “Next”
4. Click on radio button for the company selection

5. Click on Next to proceed to the next page

Here are the results of your company search. Select the company you want to associate with and click "Next".
6. Click on radio button corresponding to your site address

7. Click on Submit button Which takes to “My Profile” page
Company Association Request Pending

Your request must be approved by any of the following Partner Administrators:

Date Request Submitted:
28-SEP-2017

Cisco.com Profile To Be Associated With:
iBM
UNited KINGDOM

<table>
<thead>
<tr>
<th>Name</th>
<th>Email ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>Allan Johnstone</td>
<td><a href="mailto:allan_johnstone@uk.ibm.com">allan_johnstone@uk.ibm.com</a></td>
</tr>
<tr>
<td>Andrew Goodall</td>
<td><a href="mailto:andrew_goodall@uk.ibm.com">andrew_goodall@uk.ibm.com</a></td>
</tr>
<tr>
<td>JOHNNATHAN MOUDERS</td>
<td><a href="mailto:johnny_hve@uk.ibm.com">johnny_hve@uk.ibm.com</a></td>
</tr>
<tr>
<td>Darren Parkes</td>
<td><a href="mailto:DarrenParkes@uk.ibm.com">DarrenParkes@uk.ibm.com</a></td>
</tr>
<tr>
<td>DAVID CLARKE</td>
<td><a href="mailto:clarkd@UK.IBM.COM">clarkd@UK.IBM.COM</a></td>
</tr>
<tr>
<td>ANDREW CHARLTON</td>
<td><a href="mailto:andrew_charlton@uk.ibm.com">andrew_charlton@uk.ibm.com</a></td>
</tr>
<tr>
<td>IAN NEAGUS</td>
<td><a href="mailto:ian_neagus@uk.ibm.com">ian_neagus@uk.ibm.com</a></td>
</tr>
<tr>
<td>JOHNNATHAN MOUDERS</td>
<td><a href="mailto:j_moulders@uk.ibm.com">j_moulders@uk.ibm.com</a></td>
</tr>
<tr>
<td>Ian Sweetingham</td>
<td><a href="mailto:i_sweetingham@uk.ibm.com">i_sweetingham@uk.ibm.com</a></td>
</tr>
<tr>
<td>Razvan-Laurentiu Avramescu</td>
<td><a href="mailto:razvan.avramescu@ro.ibm.com">razvan.avramescu@ro.ibm.com</a></td>
</tr>
<tr>
<td>Mark Hare</td>
<td><a href="mailto:mhare@uk.ibm.com">mhare@uk.ibm.com</a></td>
</tr>
<tr>
<td>Category</td>
<td>My Profile</td>
</tr>
<tr>
<td>-------------------------</td>
<td>-------------------------------------------------</td>
</tr>
<tr>
<td>Association Request</td>
<td>Manage Myself with a Company</td>
</tr>
<tr>
<td>Manage Global</td>
<td>Company Details</td>
</tr>
<tr>
<td>Administrator Access</td>
<td>Manage My Reward Programs</td>
</tr>
<tr>
<td>Accountable Contacts</td>
<td>Manage Corporate Email Domain</td>
</tr>
<tr>
<td>Distributor Details</td>
<td>Association Request</td>
</tr>
</tbody>
</table>
1. **Partner User/Administrator can update their basic information** example First Name, Last Name, Business Email, Mobile Phone, Fax Number, Company Phone Number, Job Level, Job Role and Primary Language

2. Choose “My Profile” from the left side navigation menu

3. **Edit Basic Information section**

4. Review and Submit

---

- **Basic Information Update**
- **Company Details**
- **Location Management**
- **Association Request**
- **Contact Management**
- **Access Management**
- **My Profile**
- **Manage My Reward Programs**
- **Manage Corporate Email Domain**
- **Distributor Details**
- **Manage Global Administrator Access**
- **Associate Myself with a Company**
- **Manage Global Administrator Access**
- **Accountable Contacts**
- **Reports**
- **My Profile**
- **Access Management**
- **Company Details**
- **Location Management**
- **Contact Management**
1. **Partner User/Administrator** can update their Business Address in PSS.

2. Choose “My Profile” from the left side navigation menu.

3. Scroll to Business Address -> Change Location section.

4. Click on “Change Location” in the pop-up opened.

5. Choose the radio button against the location to be your address.

6. Review and Submit.
Change Location

3. Click on Change Location in the pop-up opened.
Change Location

4. Choose any of the radio buttons corresponding to the address of your new location

5. Click on "Submit"
Change/Remove My Company Association

1. Scroll to the Business Address section

<table>
<thead>
<tr>
<th>Partner Name</th>
<th>VGTECH UNITED</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business Address 1</td>
<td>11 WESTMINSTER CLOSE</td>
</tr>
<tr>
<td>Business Address 2</td>
<td></td>
</tr>
<tr>
<td>Business Address 3</td>
<td></td>
</tr>
<tr>
<td>City</td>
<td>FELTHAM</td>
</tr>
<tr>
<td>State/Province</td>
<td>MDX</td>
</tr>
<tr>
<td>Country</td>
<td>UNITED KINGDOM</td>
</tr>
<tr>
<td>Postal Code</td>
<td>TW14 9XD</td>
</tr>
</tbody>
</table>

2. Click on Change/Remove My Company Association

1. **Partner User/Administrator** can “Change or Remove My Company Association”
2. Choose “My Profile” from the left side navigation menu
3. Scroll to Business Address -> Change or Remove My Company Association section
4. Click on “Change/Remove Association” in the pop-up opened
5. Click on the confirmation pop-up Yes or No
Change/Remove My Company Association

3. Click on Change/Remove My Company Association

4. Click on Confirmation Buttons

Are you sure you want to proceed?

Yes, Remove my Association  No
Delete or Merge Cisco.com User IDs

1. Partner User/Administrator can “Delete or Merge Duplicate Cisco.com user IDs”
2. Choose “My Profile” from the left side navigation menu
3. Scroll to Business Address - > Delete or Merge Duplicate Cisco.com user IDs
4. Check the Cisco.com user IDs to be merged in the pop-up opened.
5. Click on Merge button
6. Confirmation message is displayed
Delete or Merge Cisco.com User IDs

Delete or Merge Duplicate Cisco.com user IDs

Your current Cisco.com User Id ,
tccsi

There may be more than one Cisco.com user ID associated with your profile. Here are the actions you can perform:

To merge your IDs, check the appropriate box and choose "Merge".
To delete one or more of the IDs, check the appropriate box and choose "This is not my ID".
To merge your IDs, check the appropriate box and choose "Merge".

Below are the Cisco.com user IDs associated with your profile

3. Check the Cisco.com User IDs to be merged

4. Click on Merge Button

- testpss0003
- testpss0004
1. **Partner User/Administrator** can add “Cisco Testing Information” to their Profile
2. Choose “My Profile” from the left side navigation menu
3. Scroll to Cisco Testing Information Section
4. Add Cisco Test ID corresponding to your Profile
5. Click on Submit button at the end of the page
Opt-in/Opt-out of Cisco Communications

1. Scroll to the Cisco Communications section

Occasionally, Cisco sends communications about products, programs, special offers, services, support, or invitations to participate in market research. Your personal information will be used in accordance with Cisco’s privacy statement.

I would like to receive Cisco communications by email: ☐ Yes ☐ No

1. Partner User/Administrator can “Opt-in/Opt-out of Cisco Communications”
2. Choose “My Profile” from the left side navigation menu
3. Scroll to the Cisco Communications section
4. Choose the Radio button Yes/No corresponding to whether you would like to receive Cisco Communications
5. Clicking on Yes, Choose the areas you are interested in
6. Review and Submit

---

Please select the areas that are of interest to your business:

- Technology Interests
  - Cloud
  - Enterprise Networks
  - Security
- Communications Interests
  - Compete
  - Marketing Campaigns & Enablement
  - Geographic Regions
- Cloud Studies
  - Cisco Capital & Financing
  - Events, Webinars
- Competitive
  - Sales, Acquisitions, & Strategic Partnerships
- Marketing
  - Pricing Information
- Training
- Verticals and Industries
  - Education: Public/Private
  - Government
  - Manufacturing
  - Real Estate
  - Wholesale/Distribution
- Energy/Utilities
- Health Care
- Media/Entertainment
- Retail
- Financial Services
- Hospitality/Hotels & Leisure
- Professional Services
- Transportation

4. Click Submit
<table>
<thead>
<tr>
<th>Associate Myself with a Company</th>
<th>My Profile</th>
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<th>Company Details</th>
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<td>Manage Corporate Email Domain</td>
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</tr>
</tbody>
</table>

**Access Management**
1. Partner User/Administrator can “View/Remove My Access”.
2. Choose “Access Management” from the left side navigation menu.
3. Click on the button “View/Remove My Access” available on the top right.
4. You will be able to see in an expandable format which tools you are having access to.
5. Click on the “+” sign to expand one of the value.
6. Uncheck the countries where you want to remove access for that tool.
7. Review and Click Update.
View/Remove My Access

I want to view ...
- My Profile
- Access Management

Access Management

My Access

Certification and Specialization Application...
Access Level: Administrator

For checkboxes that appear: Uncheck any items to remove access and click "Update."

4. Uncheck to remove Access

5. Click on Update
Request Additional Access

1. Click on “Access Management” menu option
2. Click on “Request Additional Access” button
3. Select the Tool you need access to
4. Select the Country/Country Group
5. Click on “Submit” button
6. Review and Click Submit

**Partner User/Administrator**
- can “Request Additional Access”
- Choose “Access Management” from the left side navigation menu
- Click on the button “Request Additional Access” available on the top right
- Select the Tool you need access to
- Select the Country/Country Group
- Click on “Submit” button
- Review and Click Submit
# Request Additional Access

Please contact any of the individual(s) listed below to request access.

## Admins

<table>
<thead>
<tr>
<th>Name</th>
<th>Email</th>
<th>Request Access</th>
</tr>
</thead>
<tbody>
<tr>
<td>Baker, Nicky (UK)</td>
<td><a href="mailto:nicky.baker@uk.didata.com">nicky.baker@uk.didata.com</a></td>
<td></td>
</tr>
<tr>
<td>Executives, Account (UK)</td>
<td><a href="mailto:UK.Cisco.Trade@uk.didata.com">UK.Cisco.Trade@uk.didata.com</a></td>
<td></td>
</tr>
<tr>
<td>Fasiani, Roberto (ITALY)</td>
<td><a href="mailto:roberto.fasiani@dimensiondata.com">roberto.fasiani@dimensiondata.com</a></td>
<td></td>
</tr>
<tr>
<td>Johnston, Caryn (UK)</td>
<td><a href="mailto:caryn.johnston@eu.didata.com">caryn.johnston@eu.didata.com</a></td>
<td></td>
</tr>
</tbody>
</table>

**Search to filter the results**

**Click on “Request Access” to contact the corresponding individual**

---

Do you want to send an email requesting access?

- Yes
- No
Partner User/Administrator can view the users with various access type at Company Level. Choose “Access Management” from the left side navigation menu. Click on the button “Company Access” available on the top right. Select the Search option. Review and Click Submit. Scroll down the end of page to view the search results. The individual contact access can be added/removed from View All Contact Access -> Add/Remove Access.
Company Access

Search Results

ChNGI, TesNGI (UK)

- **Tool**: Channel Partner Tools
- **Access Level**: Cisco.com Partner Level Access
- **Country / Country Groups**: Automatic access granted from company association

Add / Remove Access

Jeenal, Test (UK)

- **Tool**: Channel Partner Tools
- **Access Level**: Cisco.com Partner Level Access
- **Country / Country Groups**: Automatic access granted from company association

Add / Remove Access

Showing 1 - 2 Of 2

| 1 | 2 | 

Option to Filter in Search Results

Edit Access of Individual Contact
**Edit Access**

**Editing Access For: LAKIS, APOSTOLOU**

1. Uncheck / Check the checkboxes in order to revoke or grant access to selected Tool Country / Country Group

2. Click on Next button

3. Enter approval/denial comments

4. Click on Submit button

**Country/Country Group:** ARGNTNA-CHILE-PERU-URGAY-PARGAY-BLVIA

Please Enter Your Comments for this Update (Max 300 characters) (these comments will be included in the email sent to notify this individual of these access changes)
<table>
<thead>
<tr>
<th>Associate Myself with a Company</th>
<th>My Profile</th>
<th>Access Management</th>
<th>Company Details</th>
<th>Location Management</th>
<th>Contact Management</th>
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<td>Manage Corporate Email Domain</td>
<td>Distributor Details</td>
</tr>
</tbody>
</table>
Existing Partner Admins can manage their ‘Company Details’ in this section.

1. Clicking on ‘Company Details’ opens a pop-up which lists the different registered company.

2. Select the instance of your company which you want to update.
**Company Details**

Existing Partner Admins can manage their ‘Company Details’ in this section

<table>
<thead>
<tr>
<th>Business Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Company Name</td>
</tr>
<tr>
<td>Country</td>
</tr>
<tr>
<td>Head Quarter Address</td>
</tr>
<tr>
<td>Purchasing Relationship</td>
</tr>
<tr>
<td>* Corporate Web Address</td>
</tr>
<tr>
<td>Federal Tax</td>
</tr>
<tr>
<td>VAT Number</td>
</tr>
<tr>
<td>Email Domain Name</td>
</tr>
<tr>
<td>* Company Description</td>
</tr>
</tbody>
</table>

To select any of your different registered company instance, you can click ‘Change’.

In the ‘Business Information’ section, you should be able to update:
- Corporate Web Address
- Federal Tax
- VAT Number
- Email Domain Name
- Company Description

Ensure to click Submit button to save changes.
**Company Details**

Existing Partner Admins can manage their ‘Company Details’ in this section

As you scroll down through ‘Company Details’, you should be able to access ‘Diversity Status’, where you should be able to select and upload Diversity certificate for chosen business area.

This is required of US Partners only; UK, Australia, South Africa, and Canada may also choose to update this section.

Selecting the Diversity business area, enables you to Browse and Upload Diversity certificate from your local system.

- Click Browse button to select the file on your computer
- Each file size should not be greater than 5 MB
- Only documents of the type jpg, gif, png, bmp, pdf, doc, docx, xls, xlsx format will be accepted
- The file name should not have commas, ?, quotes and other special characters
- Allow 24 hours to reflect in Partner Locator

Click ‘Delete’ if you wish to upload a new document under the same category.

Please Select all that apply

- Woman Owned Business
- Minority Owned Business
- Partner.png
- Disabled Veteran Owned Business
- TestUsers 7 84.xlsx
- Service Disabled Veteran Owned Business
- disadvantaged Business
- Hubzone Small Business
- ACE Day Volunteers List.xlsx

Click ‘Delete’ if you wish to upload a new document under the same category.
Company Details

Existing Partner Admins can manage their ‘Company Details’ in this section

As you scroll further down ‘Company Details’ you should be able to review your Company’s:

- Registration Status
- Application Details
- Agreement Dates and Timelines
**Company Details**

Existing Partner Admins can manage their ‘Company Details’ in this section

As you scroll further down ‘Company Details’ you should be able to review your Company’s:

- Certifications
- Specialization
- Authorizations
- Last Approved Date, and
- Renewal Due Date

<table>
<thead>
<tr>
<th>Qualification Type</th>
<th>Certification/Specialization/Authorization(s)</th>
<th>Last Approved Date</th>
<th>Renewal Due</th>
</tr>
</thead>
<tbody>
<tr>
<td>AUTH</td>
<td>CSPP Identifier</td>
<td>08-Mar-13</td>
<td>10-Jun-18</td>
</tr>
<tr>
<td>AUTH</td>
<td>Cisco Open Stack Private Cloud</td>
<td>08-May-15</td>
<td>16-Sep-25</td>
</tr>
<tr>
<td>AUTH</td>
<td>Disabled Veteran Business Enterprise</td>
<td>05-Sep-17</td>
<td>21-Sep-18</td>
</tr>
<tr>
<td>AUTH</td>
<td>Hubzone Small Business</td>
<td>05-Sep-17</td>
<td>21-Sep-18</td>
</tr>
<tr>
<td>AUTH</td>
<td>Learning Partner</td>
<td>22-Sep-16</td>
<td>21-Sep-16</td>
</tr>
<tr>
<td>AUTH</td>
<td>Minority Business Enterprise</td>
<td>05-Sep-17</td>
<td>21-Sep-18</td>
</tr>
<tr>
<td>AUTH</td>
<td>Registered Partner</td>
<td>22-Sep-18</td>
<td>21-Sep-16</td>
</tr>
<tr>
<td>AUTH</td>
<td>Women Business Enterprise</td>
<td>05-Sep-17</td>
<td>21-Sep-16</td>
</tr>
</tbody>
</table>

Showing 1 - 8 Of 6
<table>
<thead>
<tr>
<th>Association Request</th>
<th>My Profile</th>
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<th>Contact Management</th>
</tr>
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<tr>
<td>Manage Global Administrator Access</td>
<td>Accountable Contacts</td>
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<td>Manage Corporate Email Domain</td>
<td>Distributor Details</td>
<td></td>
</tr>
</tbody>
</table>
Click on “Location Management” menu option

Location Management allows Partner Admins to manage the location of the offices of your company, within the selected country. As well as editing the details of the location, or deleting a location if the company moves, you can also select which office serves as your head office and whether a location is shown in the Partner Locator application.
Show Location in Partner Locator

Check the “Show in Partner Locator” box.
Channel Account Managers for a Location

Click the “Channel Account Team” link
Manage Contacts

Click on “Contacts”
Manage Contacts

User will be directed to “Contact Management” landing page
Make a Location a Head Quarter (HQ)

Click on “Make HQ”
Make a Location an HQ

User will see this confirmation window

Please allow 24 hours to reflect in Partner Locator.
Edit Location

Click on “Edit Location”
Edit Location

Fill mandatory fields
Edit Location

Click on “Update”
Delete Location

Click on “Delete Location”
Delete Location

Click on confirmation buttons

Are you sure you want to Proceed?

Choose "Yes" to delete this location. Choose "No" to cancel this action.

Yes  No
### Location Management

#### Add Another Location

<table>
<thead>
<tr>
<th>Location</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tetra Tech SOLUTIONS</td>
<td>123 Cisco ROAD, San Jose, CA 95136, UNITED STATES, 1234567</td>
</tr>
<tr>
<td>Tetra Tech PUBLIC SOLUTION</td>
<td>5 Cisco-City, Fremont, CA 94521, UNITED STATES, 1234567</td>
</tr>
</tbody>
</table>

- Click on Add another location

---

**Partner Self Service**

- My Profile
- Access Management
- Company Details
- Location Management
- Contact Management
- Distributor Details

**Association Request**

- Manage Global Administrator Access
- Accountable Contacts
- Manage My Reward Programs
- Manage Corporate Email Domain

**Access Management**

- Accountable Contacts
- Manage My Reward Programs

**Company Details**

- Manage Corporate Email Domain

**My Profile**

- Manage Global Administrator Access

**Location Management**

- Associate Myself with a Company
- Manage Corporate Email Domain

**Contenct Management**

- My Profile
- Access Management
- Company Details
- Location Management
- Distributor Details

---

**Add Another Location**

- Click on Add another location

---

**Access Management**

- Accountable Contacts
- Manage My Reward Programs

**Company Details**

- Manage Corporate Email Domain

**My Profile**

- Manage Global Administrator Access

---

**Association Request**

- Manage Global Administrator Access
- Accountable Contacts
- Manage My Reward Programs
- Manage Corporate Email Domain

**Access Management**

- Accountable Contacts
- Manage My Reward Programs

**Company Details**

- Manage Corporate Email Domain

**My Profile**

- Manage Global Administrator Access

---

**Location Management**

- Associate Myself with a Company
- Manage Corporate Email Domain

**Contenct Management**

- My Profile
- Access Management
- Company Details
- Location Management
- Distributor Details

---

**Add Another Location**

- Click on Add another location
Add Another Location

To add another location for your company, begin by entering the DUNS Number or the company information for that location then choose "Search."

- **Country**
- **Site Name**
- **Address1**
- **Address2**
- **Address3**
- **City**
- **State**
- **Postal Code**

Fill out fields to search if the location already exists.
Add Another Location

To add another location for your company, begin by entering the DUNS Number or the company information for that location then choose "Search."

- **Country**
  - Select One
    - Faroe Islands
    - Guernsey
    - Isle of Man
    - Jersey
    - United Kingdom
- **Site Name**
- **Address 1**
- **Address 2**
- **Address 3**
- **City**
- **State**
- **Postal Code**

Click "Search"
Add Another Location

Partner Self Service

I want to view ...
- My Profile
- Access Management
- Company Details
- Location Management
- Contact Management
- Association Request
- Accountable Contacts
- Reports
- Manage My Programs
- Manage Corporate Email Domain

Location Management

Add Another Location (Confirm)

* Country
  * Location Name
  * Address1
  * Address2
  * Address3
  * City
  * State
  * Postal code
  * Phone
  * Fax
Local Language
Office Type
Is this a support location?
Is this the HeadQuarter location?

Add

Fill out fields
Add Another Location

Click on “Add”
Filter List of Locations

Click on “Filter this list”
Filter List Of Locations

<table>
<thead>
<tr>
<th>Add Another Location</th>
<th>Manage Corporate Email Domain</th>
<th>Contact Management</th>
<th>Distributor Details</th>
<th>My Profile</th>
<th>Access Management</th>
<th>Company Details</th>
<th>Location Management</th>
<th>Accountable Contacts</th>
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<th>Manage Global Administrator Access</th>
<th>Association Request</th>
<th>Associate Myself with a Company</th>
</tr>
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<td>Fill out fields</td>
<td></td>
<td></td>
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<td></td>
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<td></td>
<td></td>
<td></td>
<td>Filter List Of Locations</td>
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</tbody>
</table>
Filter List Of Locations

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<td></td>
<td></td>
<td></td>
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Click on "Search"
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<td>Accountable Contacts</td>
<td>Manage My Reward Programs</td>
<td>Manage Corporate Email Domain</td>
<td>Distributor Details</td>
</tr>
</tbody>
</table>

Contact Management
**Contact Management**

Partner Administrators can manage their contacts in this section.

1. Clicking on ‘Contact Management’ opens a pop-up which lists the different registered companies.

2. Select the instance of your company which you want to update.
Contact Management

Partner Administrators can manage their contacts in this section.

Contacts are grouped based on their location and are listed in this page. You can search by:
- Contacts Details
- Contact Type

For every individual existing contacts quick links are provided to easily:
- Merge Contacts with Cisco.com ID
- Delete Contacts from the Company
- Add Contact Type
- Move Contacts to Another Location
- Review Career Certifications through Qualifications

For each location, you can add new contacts using the ‘Add Contact’ option.
Partner Administrators can manage their contacts in this section.

'Search Contacts' button opens a pop-up and provides various options to search for a contact who is associated with your company in our partner database. You can search by either:

- Identifier – Cisco Testing ID (CSCO#), CCIE#, Cisco.com ID, Email ID
- Individual Certificate OR Certification Category or
- Individual Access and Responsibilities or
- Contact First and Last Name or
- View All Contacts who are associated with your company.
Contact Management

Partner Administrators can manage their contacts in this section

‘Search Contact Type’ button opens a pop-up and readily provides contact who have contact type assigned. The contact type can be removed for the contact by clicking on the ‘Remove’ button against their name.

‘View All Contacts’ button refreshes the contact list on the Contact Management tab to display all contacts grouped by their location.
**Contact Management**

Partner Admins can manage their contacts in this section.

The ‘Add Contact’ button across each location lets you add new contact to that location. Clicking the button opens the pop-up where you can either search for the contact by Cisco.com ID and any of Cisco Testing ID or CCIE#. Now, the Cisco.com ID is a mandatory field. If the contact found by these attributes, their information is pre-populated.

On submitting the form, a confirmation message in a pop-up is displayed indicating that the Contact is notified via email to confirm company association.

When the contact confirms association, their Cisco.com ID would be promoted to Partner user access level.
Contact Management

Partner Administrators can manage their contacts in this section

Clicking on any Contact’s name, a pop-up opens with their details, you should be able to review and update that Contact’s details in it.

Profile Information

<table>
<thead>
<tr>
<th>Basic Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>* First Name</td>
</tr>
<tr>
<td>* Last Name</td>
</tr>
<tr>
<td>* Business Email</td>
</tr>
<tr>
<td>* Fax Number</td>
</tr>
<tr>
<td>* Job Level</td>
</tr>
<tr>
<td>* Primary Language</td>
</tr>
</tbody>
</table>

Business Address

- Partner Name: 
- Business Address 1: 4233 Richfield Avenue
- Business Address 2: 
- Business Address 3: 
- City: Reading
- State/Province: Berkshire
- Country: United Kingdom
- Postal Code: RG1 8PA

You can review the Contact’s location or Submit a Cisco Testing ID for the contact if available.

Cisco Testing Information

If you have passed any certification exams, enter your Cisco number. To ensure that this certification is added correctly, make sure the first and last name in your profile matches the name on the test. Click here to find your testing information.

Cisco Testing ID (CISCO): 
Cisco Testing ID (CISCO) (For example: CISCO12345678)

If you have more than one Cisco ID, click here

Submit
Contact Management

Partner Administrators can manage their contacts in this section.

Clicking on ‘Merge Contacts’, provides a pop-up window asking for Contact’s Cisco.com User ID. If available, update the Cisco.com User ID and hit ‘Submit’.

Multiple Cisco.com IDs are listed for the Contact, who can then decide to Merge or Delete the relevant IDs through ‘My Profile’ with their login.
Contact Management
Partner Administrators can manage their contacts in this section

Clicking on ‘Delete Contacts’, provides a pop-up message asking to confirm the delete action.

Upon deleting the Contact association from the Company, their Cisco.com ID access would be downgraded to Guest user.
Contact Management

Partner Administrators can manage their contacts in this section.

Clicking on 'Qualifications', provides details on the Career Certifications in a pop-up along with the Original Certified Date, Recertified Date, and Expiration Date wherever applicable.
Contact Management

Partner Administrators can manage their contacts in this section

Clicking on ‘Add Contact Type’, provides a pop-up to select the applicable ‘Contact Type’ for the contact from the available drop down
Contact Management

Partner Administrators can manage their contacts in this section.

Clicking on ‘Move Contacts to Another Location’, provides a pop-up window with all registered locations for the chosen Company. On deciding which location to assign the contact to, click the ‘Submit’ button found across the chosen location.

Success message is displayed to confirm the partner has been assigned to the chosen location.

List of Locations

To change locations, select a new location from the following list:

<table>
<thead>
<tr>
<th>Name</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>VGTECH SOLUTIONS TESTING</td>
<td>12222 PEARLS RD, HOUNSLOW, MDX, UNITED KINGDOM</td>
</tr>
<tr>
<td>VGTECH TEST SITE FOR UPDATE</td>
<td>4233 Richfield Avenue, Reading, BERKSHIRE, UNITED KINGDOM</td>
</tr>
<tr>
<td>VG TECH LOGISTICS FELTHAM</td>
<td>11 WESTMINSTER CLOSE, FELTHAM, MDX, UNITED KINGDOM</td>
</tr>
<tr>
<td>Test Site with Label change</td>
<td>9-11 BEDFORD LAKES, FELTHAM, MDX, UNITED KINGDOM</td>
</tr>
<tr>
<td>TEST NEW VG TECH SITE</td>
<td>9-11 NEW SQUARE, FELTHAM, MDX, UNITED KINGDOM</td>
</tr>
</tbody>
</table>

Success message: Contact Moved Successfully
Contact Management

Partner Admins can manage multiple contacts in this section

Clicking on ‘Manage Contacts’, provides partner admins the ability to:

- Filter for users requiring an update to their corporate email address
- Move or remove multiple contacts
- Remove multiple contacts in bulk using a template
- Verify whether a user has a public domain email

A maximum of 50 contacts can be moved or removed by selecting the check box next to user in each row

More than 50 contacts can be removed at one time by using Bulk Contact Removal

<table>
<thead>
<tr>
<th>Cisco.com User ID</th>
<th>Name</th>
<th>Email</th>
<th>Public Email Domain?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Doerosie</td>
<td>Rosie Doe</td>
<td><a href="mailto:doe_rosie@datatime.com">doe_rosie@datatime.com</a></td>
<td>No</td>
</tr>
<tr>
<td>Doelee</td>
<td>Lee Doe</td>
<td><a href="mailto:doe_lee@datatime.com">doe_lee@datatime.com</a></td>
<td>No</td>
</tr>
<tr>
<td>Doejack</td>
<td>Jack Doe</td>
<td><a href="mailto:doe_jack@datatime.com">doe_jack@datatime.com</a></td>
<td>No</td>
</tr>
<tr>
<td>Doehenry</td>
<td>Henry Doe</td>
<td><a href="mailto:doe_henry@datatime.com">doe_henry@datatime.com</a></td>
<td>No</td>
</tr>
<tr>
<td>Doelee</td>
<td>Lee Doe</td>
<td><a href="mailto:doe_lee@datatime.com">doe_lee@datatime.com</a></td>
<td>No</td>
</tr>
<tr>
<td>Doebill</td>
<td>Bill Doe</td>
<td><a href="mailto:doe_bill@datatime.com">doe_bill@datatime.com</a></td>
<td>No</td>
</tr>
</tbody>
</table>

Max of 50 contacts per submission can have their association removed or their location updated.

There is no restriction when using Bulk Contact Removal to remove user association.
After clicking on 'Remove Selected Contacts', a confirmation box appears. To proceed click on 'Submit'. *This action cannot be undone.*
After clicking on ‘Move Selected Contacts’, box appears showing the available Site Names

Click ‘Select’ on the desired Site Name row or click ‘Cancel’

After clicking on ‘Move Selected Contacts’, a confirmation box appears

Click ‘Confirm’ to move the contacts to the desired Site, or Select Another Location to return to the previous screen
Contact Management

After clicking on ‘Bulk Contact Management, three options are available:

1. Download a file of company contacts
2. Download an empty contact template
3. Upload a contact template to remove contacts

Removing contacts cannot be undone. When uploading a file the system will process the file offline. Check back in PSS Contact Management to verify the users were successfully removed.

Upload template requirements include:

- Only one upload request may be submitted within a 4 hour period.
- Each file size should not be greater than 5MB.
- Only document types of ‘xls’, ‘xlsx’, ‘csv’ format will be accepted.
- The file name should not have special characters such as ‘?’, ‘!’, ‘>’, ‘/’, ‘:’.
# Association Requests

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## Association Requests

- **Associate Myself with a Company**
- **Manage Global Administrator Access**
- **Accountable Contacts**
- **Manage My Reward Programs**
- **Manage Corporate Email Domain**
- **Distributor Details**
As a Partner Administrator, the process of approving any requests for association with your company lies solely with you. It is up to you to validate that the user is affiliated with your company.

To approve associations, select one or more checkboxes for each pending request and choose "Approve".

1. Select the contact whose association request you would like to Approve/Deny

2. Click Approve or Deny based on your decision
The next page will display all the requests you have selected for final review. If you wish to remove any requests, unselect the appropriate checkboxes. After your final review, choose “Submit.” You will receive a message confirming the approval and an email will be automatically sent to the user.

Review the contact details and click Submit to Approve the request or Cancel to return to the previous screen.
Association Requests - Approve

Displays the list of contact(s) whose Association requests are Approved.
Association Requests - Denied

Deny Requests
As a Partner Administrator you can determine which requests to deny. The process is similar to approving requests, but you need to select a reason from the drop down menu provided for each denied request (see Figure).

As in the approval process, you will receive a confirmation message and an email will be sent to the user.

Review the contact details and click Submit to Deny the request or Cancel to return to the previous screen.
All such Partner Administrator initiated association requests will be visible in this screen. The Partner Administrator can change the location of the contact or cancel the association request. The Partner Administrator can also initiate partner contact association requests via the Contact Management Tab.
1. Select the contact whose association request you would like to Change Location or Cancel Request

2. Click on Change Location
Partner Administrator Initiated Requests – Change Location

Select the desired location and click Submit
This will change the contact’s site association, as selected.
Partner Administrator Initiated Requests – Change Location

The contact will be mapped to the new location.

The update may take 24 hours to reflect.
Partner Administrator Initiated Requests – Cancel Request

Alternatively, you can also cancel the contact’s administrator initiated association request.

1. Clicking the Cancel Request will present you a confirmation pop-up as indicated.

2.a. Clicking Yes, will remove the selected contact record from the list.
2.b. Clicking No will close the pop-up and retain the contact record.
Manage Global Administrator Access
Partner Administrators can “Manage Global Administrator Access”.

Choose “Manage Global Administrator Access” from the left side navigation menu.

You will be able to view/remove your global administrator access.

To manage the Global Access of your company employees click on “Company Global Access”.

Choose the Search option and click on “Search” or “View All Contact Access”.

Click on “Edit” against each contact to update their Global Access.

1. Partner Administrators can “Manage Global Administrator Access”.
2. Choose “Manage Global Administrator Access” from the left side navigation menu.
3. You will be able to view/remove your global administrator access.
4. To manage the Global Access of your company employees click on “Company Global Access”.
5. Choose the Search option and click on “Search” or “View All Contact Access”.
6. Click on “Edit” against each contact to update their Global Access.
Manage Global Administrator Access

You can grant Group Administrator Access to individuals within your company. Begin by entering an individual's contact information and identifying the search criteria from the drop down menu. You can also search for the individual by selecting the appropriate country location. To view a list of contacts within your company, select the "View all Contact Access" tab.

Choose any of the Search Options

Click on Search button
Manage Global Administrator Access

As an Administrator, you can manage access privileges for your company's employees. Select a user and choose "Edit" to manage an individual's access privileges.

Search Results

<table>
<thead>
<tr>
<th>Contacts</th>
</tr>
</thead>
<tbody>
<tr>
<td>Aman</td>
</tr>
</tbody>
</table>

Access Level: Partner Admin Level Access, Group Admin Level Access

Option to filter Search Results

Search

Click on "Edit" to modify individual contact access
Accountable Contacts
Accountable Contacts

Partner Administrators can assign and manage Program Contacts in this section.

Clicking on ‘Accountable Contacts’, provides details on the current assigned Accountable Program Contacts, along with the option to assign new Accountable Program Contacts.
Partner Administrators can assign and manage Program Contacts in this section.

'Accountable Contacts' section provides the list of existing assigned Program Contacts.

Clicking on the Delete button, you can delete the Program Contact assignment.

You will have to confirm if you actually need to delete the Program Contact.

Confirmation

Are you sure you want to delete Program Contact?
Choose "Yes" to delete OR Choose "No" to cancel this action.

Yes  No
Accountable Contacts

Partner Administrators can assign and manage Program Contacts in this section

You can add new Program Contacts through the ‘Add Accountable Contact’ section

As indicated, you can assign only one Program contact for each Role
1. Click Search using Name or Cisco.com Id or E mail whom you want to assign as a program contact
2. Select appropriate Role
3. Click Add to Save

Only contacts with valid Cisco.com ID can be searched and assigned as a Program Contact
Partner Administrators can assign and manage Program Contacts in this section.

1. Search for the contact
2. Select the appropriate contacts from the search results
3. Select Appropriate Program Role
4. Click Add to complete submission
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Reports
When clicking the Report tab, PSS pops-up the list of geographic locations, the admin has access to. After choosing a company country location, select the link of the report you would like to generate. Partner Administrator access allows you to generate Excel reports that can help you get the most from your Cisco partnership. Generating a report is easy, offering you the option to view or save reports.
Listed are the available reports that can be generated by the Partner Administrator

** Please allow the report to generate before attempting to generate another
Manage My Reward Programs
1. **Partner Administrators** can “Manage My Reward Programs” in this section.

2. The reward programs enrolled in by the user company are visible here.

3. User can opt-in or opt-out of the Reward Program in this section.

4. To Opt-in the Reward Program, user has to sign the PDF for terms and conditions.

5. To Opt-out click on Opt-out button and confirm on the page.

1. Click on the “Manage My Reward Programs” on the left-side navigation menu.
1. Click on the Opt-in button corresponding to the reward program
2. Accept the terms and conditions of the PDF. Click on the Accept button
1. Click on the Opt-out button corresponding to the reward program.
2. Click on the Confirmation buttons Yes/No to opt-out of the program.
Manage Corporate Email Domain
PSS’s smart engine detects frequently used Email domains by contact association requests and gives you the option to add it to the Auto-Approve list.

For example, in the given example if trbvm.com is added to the auto-approve list, all contacts requesting partner association with email ids with domain trbvm.com (xyz@trbvm.com), will be auto-associated to the partner and will not require Partner Admin approval.

All partner users must comply with the Cisco Contractual Terms and Conditions, including those related to public email domains.
<table>
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**Distributor Details**
1. **Partner Administrators** can view the Distributor and Reseller Details entered for a 2-Tier partner in this tab.

2. Go to Distributor Details tab on the left side navigation menu.

3. You will be able to see Distributor and Reseller Details entered on the top.

4. To select more Distributor(s), please check them in the section below.

5. The Reseller number has to be keyed in corresponding to the Distributor checked out.

6. Click on the “+” icon to add more reseller numbers.

7. Click on “Save.”

8. A success message will pop up, “Your entered information updated successfully.”
Help & Support
Resources

**User Guide:** Provides detailed instructions about how to use the Partner Self Service tool and register your company as a Cisco Registered Partner.

**Partner Support:** Contact Cisco Customer Service Team for questions or concerns about the tool or process.
Contact Partner Support

- If you have questions or concerns about the Partner Self Service or process, click the Partner Support Button to the right for the ability to:
  - Open a Support Case
  - Track Your Support History

- If you are not able to find your question in our knowledge database, you may open a support case. A partner support representative will provide a timely response to your inquiry.