
CISCO SMART ACCOUNT

SETUP GUIDE

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TABLE OF CONTENTS

1.0	Overview	4
2.0	Roles	4
3.0	Create a Smart Account	5
3.1	Step 1: Create a Cisco.com (CCO) user ID.....	5
3.2	Step 2: Create customer Smart Account	5
3.3	Step 3: Complete Smart Account setup	7
4.0	Support.....	10

1.0 OVERVIEW

A Cisco Smart Account is a customer centralized account that provides full visibility and access control to receive, activate, and manage Cisco Smart Licenses.

A Smart Account enables you to view and control access to Cisco software licenses and entitlement across the organization as well as perform tasks such as license file downloads or license re-hosting in a tool called Cisco Smart Software Manager (CSSM).

Smart Accounts can also be used to view all your Product Activation Keys (PAKs) associated to a Smart Account in License Registration Portal (LRP) instead of at the individual Cisco user ID.

This guide demonstrates how to create a Smart Account.

2.0 ROLES

To help control access future, users can be assigned the following roles:

Account Approver

- Can only approve Smart Account legal agreements on behalf of the Account Owner. Includes no user or administrator privileges.

Smart Account Administrator

- Manages all aspects of the Smart Account and its Virtual Accounts. The Smart Account Administrator can view and manage license inventory for the entire Smart Account, and also perform account management activities.

Smart Account User

- Similar to a Smart Account Admin, this role allows access to all Virtual Accounts. A Smart Account User can perform licensing activities, but cannot create new Virtual Accounts or perform user management activities.

Virtual Account Administrator

- Similar to the Smart Account Administrator, but limited to selected Virtual Accounts. Can perform license management activities and also user management activities for selected virtual accounts.

Virtual Account User

- Similar to a Smart Account User, but is limited to the Virtual Account the User is assigned to. They can perform license management activities, but cannot add new users to their assigned Virtual Account.

NOTE: The Smart Account creation cannot be done by anyone other than an individual that is part of your company and whom is legally authorized to enter into an agreement on behalf of your company.

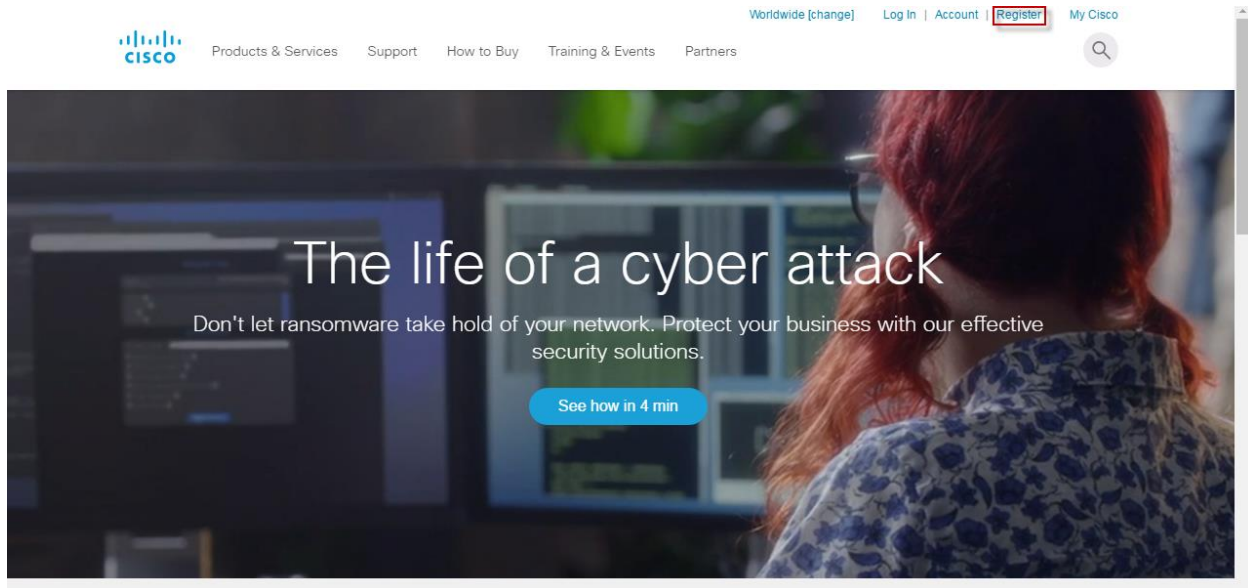
3.0 CREATE A SMART ACCOUNT

Follow the below steps to create a Smart Account.

3.1 Step 1: Create a Cisco.com (CCO) user ID

A CCO ID is used to log in to Cisco Software Central (CSC) to create the Smart Account.

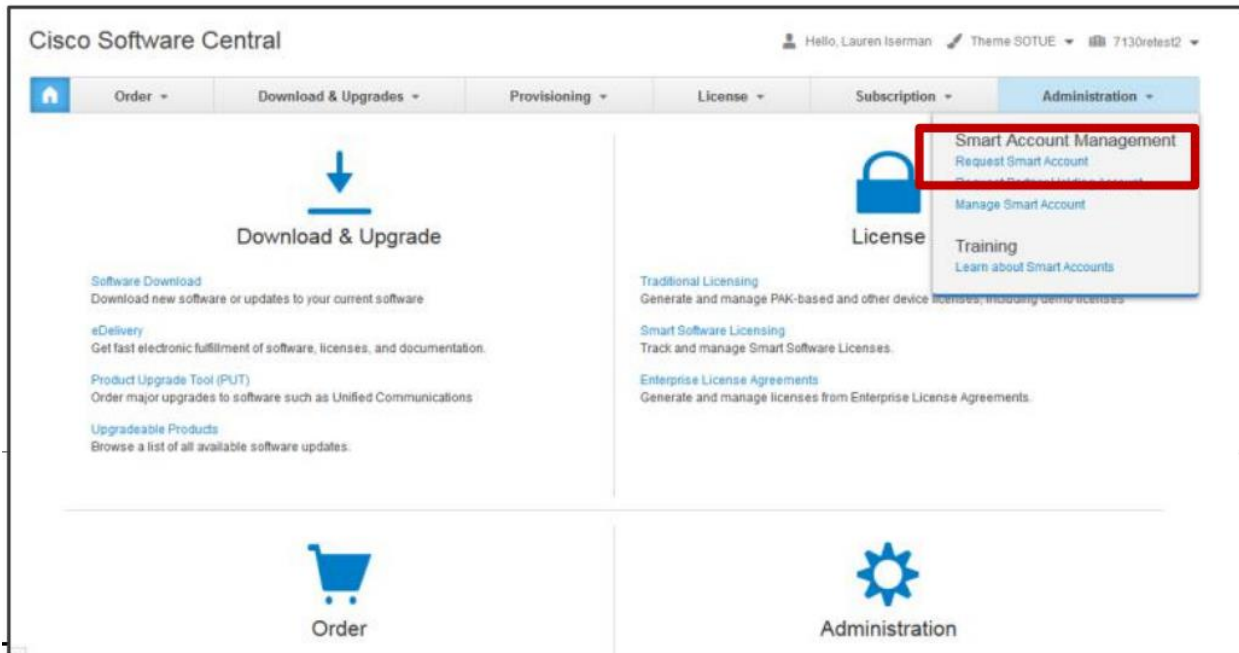
1. Go to cisco.com and click **Register** in the top right corner.



2. Enter your personal and company details, accept the terms and conditions, and click **Submit**.
3. A confirmation page opens once the details are submitted. You will receive an activation email.
4. Click the link in the email to activate or validate your Cisco.com profile. Once your account has been created, you will receive a confirmation email.

3.2 Step 2: Create customer Smart Account

1. Log in to [Cisco Software Central \(CSC\)](https://cisco.com).
2. Under Administration tab, click **Create Smart Account** to request a Smart Account



- On the Smart Account request page, under Create Account select **Yes** or **No** to assign yourself or someone else to be the account creator and represent the company.

NOTE: Creator has the authority to represent the company and create the account. The creator can also be the requester.

- Under Account Information, click **Edit** to update the Domain Identified of the Account (optional—requires additional approval time).
- In the Edit Account Identifier dialog box, review and update domain identifier information and click **OK**.
- Enter Account Name (Company Name) and click **Continue** to complete the Smart Account request.

Smart Account Request

Use this page to request a Smart Account that will be used for managing your company's relationship with Cisco, including initiatives such as Smart Licensing.

Create Account

Would you like to create the Smart Account now?

☐ Yes, I have authority to represent my company and want to create the Smart Account.

☒ No, the person specified below will create the account.

* Email Address:

Message to Creator:

Account Information

The Account Domain Identifier will be used to uniquely identify the account. It is account. [Learn More](#)

* Account Domain Identifier: [Edit](#)

* Account Name:

[Continue](#)

Account Domain Identifier

- Identifies company owning the account
- Should be internet domain of company
- Defaults to Creator email domain – can be changed through manual approval

Edit Account Identifier

This Account Domain Identifier is generated based on the domain of the primary email address in your Cisco.com profile and will need to undergo an approval process if you change it. Cisco will contact you by telephone to complete this process, so please verify or enter your desired contact phone number below.

If you change the Account Domain Identifier, it must maintain domain format and can include subdomains to the left of the domain, e.g., east.example.com or west.example.com.

* Proposed Domain Identifier:

* Contact Phone Number:

[OK](#) [Cancel](#)

If you choose to edit the Account Domain Identifier at the time of Smart Account Creation, Cisco will contact you to complete the approval process.

In this example, we will demonstrate when someone else is the creator. If the requestor is also the creator, they will continue with the setup process on slide 24.

7. Review the account information and click **Create Account**. The creator of the account will receive an email with instructions.

3.3 Step 3: Complete Smart Account setup

The creator will receive an email from Cisco to complete the Smart Account setup.

1. Click **Complete Smart Account Setup** to continue with the Smart Account creation.
2. You need a CCO ID. If you don't have one, click **register for a new account**.

New Cisco Smart Account - Big-U University (Pending)

A new Cisco Smart Account has been requested for "Big-U University" and you have been designated as the person to create this account. A Smart Account is used for managing your company's relationship with Cisco, including initiatives such as Smart Licensing. This account is currently in a Pending state, as it requires a person designated as the "Account Creator" to complete the process. Review the Account Summary information below and click the Complete Smart Account Setup link to continue.

[Complete Smart Account Setup »](#)

Note: You will need to log in with a Cisco.com ID. If you don't have one, you will need to [register for a new account](#).

Cisco Smart Account Summary

Account Domain Identifier:	big-u.edu
Account Name:	Big-U University
Account Status:	Pending
Account Creator:	Bill Jones (bill.jones@big-u.edu)
Requested by:	Al Smith (al.smith@acme.com)
Message to Account Creator:	Hi Bill, This is the account setup I mentioned last week.

If you feel you got this notification in error, contact [Al Smith](#), who requested the account, or [click here to reject the account request](#).

Note: the account can be requested by a Partner or Sales user on your behalf. In that case, the creator for your company will need to accept the role and complete the setup for the account to be created. You need the account to consume any smart licenses purchased.

3. The creator will accept the role or decline and/or nominate another person. In this example, the creator accepted the role.

Cisco Software Central > Request Smart Account

Hello, John User

Smart Account Request

A Cisco Smart Account has been set up for "Big-U University" and you have been nominated as the person to create the account. This Smart Account will help you manage and track Cisco products and services for your organization. The account is currently in a Pending state and will remain so until the setup process has been completed.

Create Account

Would you like to create the Smart Account now?

☒ Yes, I have authority to represent my company and want to create the Smart Account.

☐ No, I will not create the account and do not know who to nominate to create it.

☐ No, the person specified below will create the account:

✱ Email Address:

Account Summary

Account Domain Identifier:	big-u.edu
Account Name:	Big U
Message to Account Creator:	Hi Bob, This is the account setup I mentioned last week.
Requested By:	Al Smith (al.smith@acme.com)

[Continue](#)

4. Click **Continue**
5. Enter the Account name in the Account Name field. Edit domain if needed.
6. Click **Continue**.

NOTE: The account name should reference the company name, to mirror the domain of the account owner's company. E.g., if the Domain is Cisco.com, the account name should be Cisco.

Cisco Software Central > Request Smart Account

Hello, John User

Smart Account Request

Account Information

The Account Domain Identifier will be used to uniquely identify the account. It is based on the email address of the person creating the account by default and must belong to the company that will own this account. [Learn More](#)

Account Domain Identifier: bigu.edu [Edit](#)

Account Name: Big U

[Back](#) [Continue](#)

7. Select the corporate headquarters legal country location for the Smart Account.
8. Enter the name of the company. Search results will populate. You can also click **Show more results**.

Smart Account Setup

In order to validate the identity of the new account, Cisco requires that the account be associated with the legal

Company/Organization Headquarters Search

Country: Canada

Company/Organization: Big University

☐ Can't find the address? Enter the company/organization address instead.

[Back](#) [Continue](#)

[Contacts](#) | [Feedback](#) | [Help](#) | [Site Map](#) | [Terms & Conditions](#)

MY BROADCASTING CORPORATION, 321B RAOUL
CANADA

MY BROADCASTING CORPORATION, UNIT 1 - 851
NTG 0A3, CANADA

MY PLACE HOSPITALITY CORPORATION, SUITE 11
MB, R3G 0P5, CANADA

MY BROADCASTING CORPORATION, OLIVER PARK
1J3, CANADA

[Show more results](#)

9. Select address and click **Continue**.

If you cannot find the address:

1. Click **Can't find the address? Enter the company/organization headquarters address instead**.

Smart Account Setup

In order to validate the identity of the new account, Cisco requires that the account be associated with the legal address for the company/organization.

Company/Organization Headquarters Search

Country:

Company/Organization:

Search Results:

Company/Organization Name	Address	City	State/Region/Province
MY BROADCASTING CORPORA...	3215 RAGLAN ST S	RENFREW	ON
MY BROADCASTING CORPORA...	UNIT 1 - 85 ZIMMERMAN AVE	STRATHROY	ON
MY PLACE HOSPITALITY CORP...	SUITE 103 - 812 PORTAGE AVE	WINNIPEG	MB
MY BROADCASTING CORPORA...	OLIVER PARK, 20 MARKET SQ	NAPANEE	ON

☒ Can't find the address? Enter the company/organization headquarters address instead.

2. Enter address.
3. Click **Continue**.
4. Click **Use Modified Address**.

Smart Account Setup

In order to validate the identity of the new account, Cisco requires that the account be associated with the legal address for the company/organization headquarters.

☒ Can't find the address? Enter the company/organization headquarters address instead.

Enter Company/Organization Headquarters Address

Company/Organization Name:

Country:

Address:

Address 2:

City:

State/Province/Region:

Zip Code/Postal Code:

Address Modified

The address you entered has been modified for accuracy and to standardize formatting.

Entered: 5555 KINGSTON ROAD, TORONTO, ONTARIO, M3C 0C1, CANADA

Modified: 5555 KINGSTON RD, TORONTO, ONTARIO, M3C 0C1, CANADA

10. Add approvers or designate yourself as the approver. The approver should have the authority to bind the company in any agreements pertaining to the Smart Account.
11. Add Account Administrators.
12. Click **Continue**.

Cisco Software Central > Request Smart Account

Hello, John User

Smart Account Request

You can nominate Account Approvers and additional Account Administrators now or add them after the account has been created. If you nominate users now, emails will be sent to the specified addresses containing instructions on how to accept the role and access the account.

Account Approvers (optional)
As Approvers, these users must have the proper authority to bind your company to certain agreements, e.g., license agreements.

Approvers:
☐ I will be an Account Approver

Additional Account Administrators (optional)
You will be an Administrator for this account, but you can also nominate other persons to act as Administrators. [Learn More](#)

Additional Administrators:

Approver:

- A User with the authority to bind their company to license agreement and any agreements pertaining to the Smart Account
- Accepts the Smart Licensing agreement

Administrator:

- Approve access for other users' Smart Accounts
- License management in Smart Software Manager
- Can accept the Smart Licensing agreement → becomes Approver

13. Review the account information and click **Create Account** to complete the account setup.

Cisco Software Central > Request Smart Account

Smart Account Request

Review the information below to ensure it is correct before continuing.

Account Request Summary

Account Domain Identifier:	bigu.edu
Account Name:	Big U
Address:	170 Tasman Drive
City:	San Jose
State/Province/Region:	CA
Zip Code/Postal Code:	95134
Country:	United States
Account Approvers:	Bob Smith (bob.smith@bigu.edu)
Account Administrators:	Bob Smith (bob.smith@bigu.edu)
Requested By:	Bob Smith (bob.smith@bigu.edu)

14. On the confirmation page, click Cisco Software Central to view and manage your smart account.

4.0 SUPPORT

For general registration help, visit http://www.cisco.com/web/help/reg/general_reg.html

For software licensing issues or questions, contact Cisco at:

- Email: Licensing@cisco.com (include your CCOID in the email)
- Phone: 1-800-553-2447

Software licensing support hours are Monday to Friday, 8 a.m. to 5 p.m. (PT).