CISCO

Getting Started with Your Smart Account and Smart Licenses

Smart Account supports Smart Licenses. Smart Licenses require a Smart Account.

Get Started!

1. Log in to **software.cisco.com** using your Cisco ID.
2. Select **Manage Smart Account** under the **Administration** section to manage your Smart Account.
3. Select **Smart Software Licensing** under the **License** section to manage your Smart Licenses. **Smart Software Licensing** is also referred to as **Cisco Smart Software Manager (CSSM).**
4. Your view and available actions are based on your assigned role.

Things You do in 'Manage Smart Account'

1. Create a Virtual Account
2. Add Users and Manage Roles
3. Add User Groups
4. Tag a Virtual Account
5. View Notifications

Check out our Resources-on-Demand:
- ✓ Introduction to Smart Account
- ✓ Assign a Partner to Manage Your Smart Account
- ✓ Structure Your Smart Account

Things You do in 'Cisco Smart Software Manager (CSSM)'

1. Check Alerts
2. View and Manage Smart Licenses
3. Register and Manage Devices
4. Convert Classic Licenses to Smart Licenses
5. Generate Custom Reports and Upload Usage Reports
6. Enable Smart License Notifications
7. View and Manage Satellites
8. View License Activity

Check out our Resources-on-Demand:
- ✓ Introduction to Smart Software Licensing
- ✓ Manage Your Smart Licenses in Cisco SSM
- ✓ Introduction to Smart License Using Policy
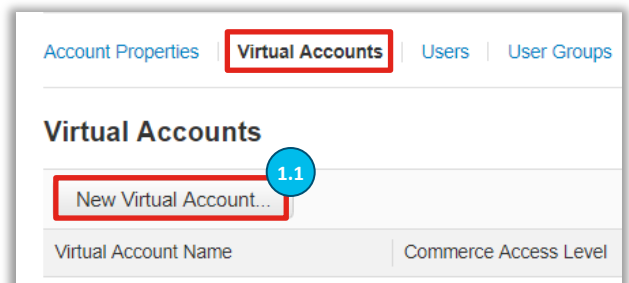
Manage Your Smart Account

1. Create a Virtual Account

1.1. Create Virtual Accounts in the Accounts tab to organize all of your licenses and   devices within your Smart Account.

Check out our Resources-on-Demand:
- ✓ Create a Virtual Account
- ✓ Tag a Virtual Account
- ✓ Best Practices for VA Tagging

Account Properties | **Virtual Accounts** | Users | User Groups

Virtual Accounts

New Virtual Account... | 1.1

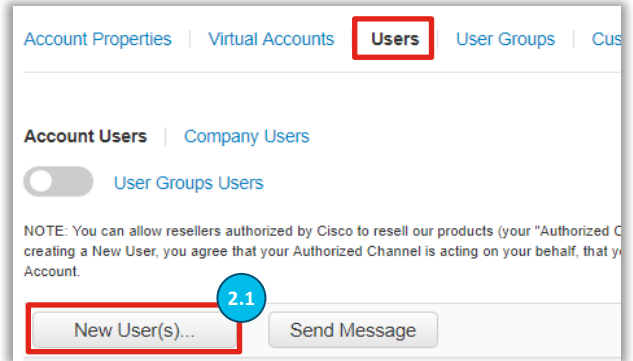Virtual Account Name | Commerce Access Level

2. Add Users and Manage Roles

2.1. Use the **Users** tab to:
- Control access and assign users to specific Virtual Accounts
- Grant management rights to users within a Virtual Account

Check out our Resources-on-Demand:
- ✓ Smart Account Roles
- ✓ Add New User
- ✓ Search

Account Properties | Virtual Accounts | **Users** | User Groups | Cus

Account Users | Company Users

⬤ User Groups Users

NOTE: You can allow resellers authorized by Cisco to resell our products (your "Authorized C creating a New User, you agree that your Authorized Channel is acting on your behalf, that y Account.
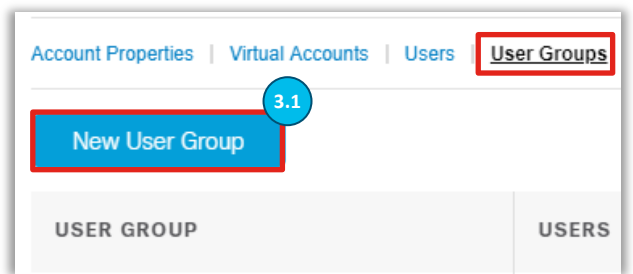
2.1

New User(s)... | Send Message

3. Add User Groups

3.1. Use the **User Groups** tab to:
- Add and delete User Groups
- Manage Virtual Account access
- Request access to external Smart Accounts and span user groups across multiple Smart Accounts
- Send messages to the User Group

Check out our Resources-on-Demand:
- ✓ User Groups
- ✓ User Group Across Multiple Smart Accounts

Account Properties | Virtual Accounts | Users | **User Groups**

3.1
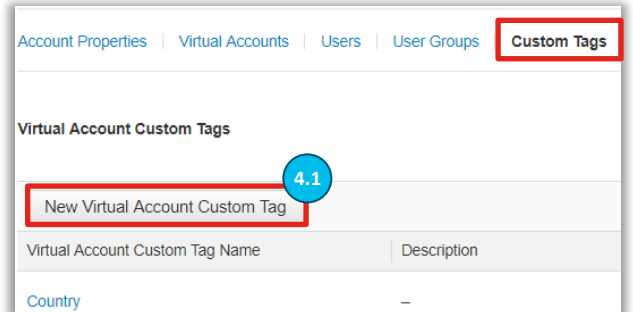
New User Group

USER GROUP | **USERS**

4. Tag a Virtual Account

4.1. Use the **Custom Tags** tab to:
- Create Custom Tags at the Virtual Account level (e.g. Department, Geography, Technology group, etc.)
- Choose values for each tag
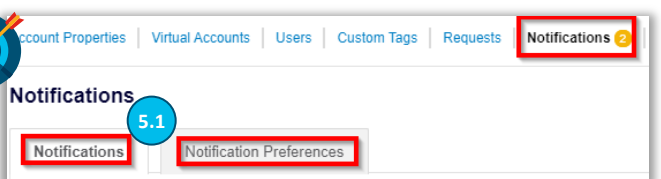
Check out our Resources-on-Demand:
- ✓ Add Virtual Account Tag
- ✓ Best Practice: SA, VA and License Tagging

Account Properties | Virtual Accounts | Users | User Groups | **Custom Tags**

Virtual Account Custom Tags

4.1

New Virtual Account Custom Tag

Virtual Account Custom Tag Name	Description
Country	–

5. View Notifications

5.1. Use the **Notifications** tab to:
- Review pending and completed Smart Software Licensing Notices
- Customize your Notification Preferences

ccount Properties | Virtual Accounts | Users | Custom Tags | Requests | **Notifications** ②

Notifications

5.1

Notifications | Notification Preferences

Manage Your Smart Licenses Using Cisco Smart Software Manager (CSSM)

1. Check Alerts

1.1. Use the **Alerts** tab to view:
- Major alerts that require immediate user action
- Minor alerts that do not require immediate action
- Information alerts that do not require any action

Check out our Resources-on-Demand:
- ✓ Manage Your Smart Licenses
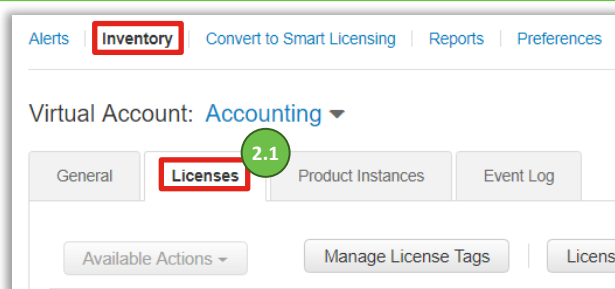
2. View and Manage Smart Licenses

2.1. Use the **Licenses** tab to:
- Manage licenses i.e. transfer, upgrade, tag and port licenses
- Check license usage and availability

Check out our Resources-on-Demand:
- ✓ Add, Delete and Manage License Tag
- ✓ Bulk Operations

Alerts | **Inventory** | Convert to Smart Licensing | Reports | Preferences

Virtual Account: Accounting ▼

| General | **Licenses** (2.1) | Product Instances | Event Log |

Available Actions ▾   Manage License Tags   Licens

3. Register and Manage Devices

3.1. Use the **General** tab to:
- Generate tokens to register a product/device
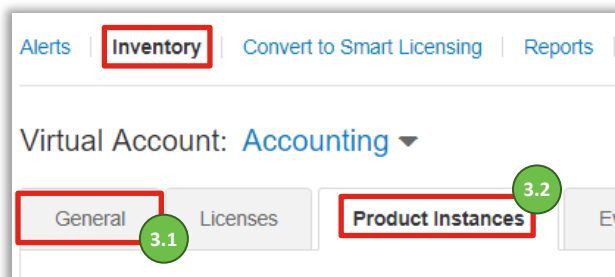- After registration, the product/device will be visible in **Product Instance tabs.**

3.2. Use the **Product Instances tab** to:
- View registered products/devices
- Transfer or remove products/devices

Check out our Resources-on-Demand:
- ✓ CSSM Product Registration

Alerts | **Inventory** | Convert to Smart Licensing | Reports

Virtual Account: Accounting ▼

| General (3.1) | Licenses | **Product Instances** (3.2) | Ev |

4. Convert Classic Licenses to Smart Licenses

Use the **Convert to Smart Licensing** tab to:

4.1. Convert Classic Licenses on a PAK or on a device to a Smart License

4.2. Check the license conversion status

4.3. Modify your Smart License conversion settings

Check out our Resources-on-Demand:
- ✓ Convert Classic Licenses to Smart Licenses
- ✓ Assign a Classic PAK-based license to a Smart Account

Alerts | Inventory | **Convert to Smart Licensing** | Reports | Preferences | Satellites | Activity

License Conversion

| **Convert PAKs** (4.1) | Convert Licenses (4.2) | Conversion History (4.3) | Conversion Settings | Event Log |

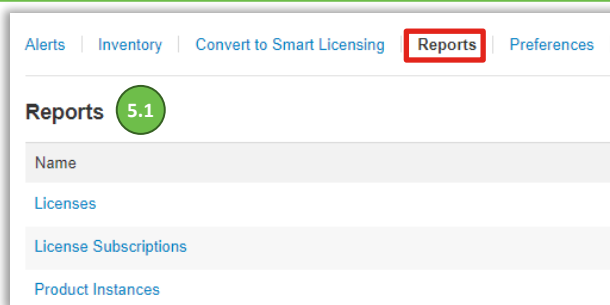## 5. Generate Custom Reports and Upload Usage Reports

5.1. Use the **Reports** tab to generate custom reports for:
- Licenses
- License Subscriptions
- Product Instances

5.2 Upload usage reports for SL using Policy

Check out our Resources-on-Demand:
- ✓ Manage Your Smart Licenses
- ✓ Smart Licensing Using Policy

Alerts | Inventory | Convert to Smart Licensing | **Reports** | Preferences

Reports 5.1

Name
Licenses
License Subscriptions
Product Instances

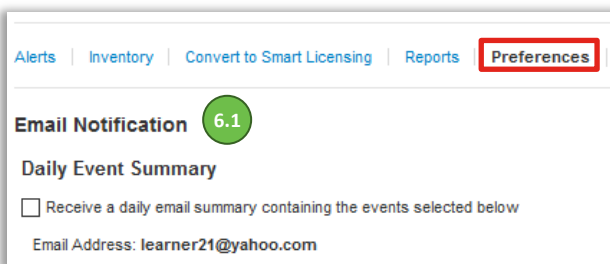## 6. Enable Smart License Notifications

6.1. Use the **Preferences** tab to enable email notifications for your Smart Licenses. Notification types include:
- Daily Smart License event summaries
- Satellite synchronization status notifications

Check out our Resources-on-Demand:
- ✓ Manage Your Smart Licenses

Alerts | Inventory | Convert to Smart Licensing | Reports | **Preferences**

Email Notification 6.1

Daily Event Summary

☐ Receive a daily email summary containing the events selected below
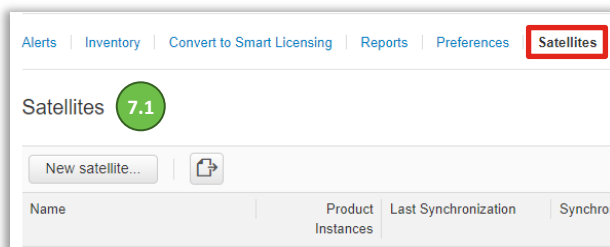
Email Address: learner21@yahoo.com

7. View and Manage Satellites

7.1. Use the **Satellites** tab to manage your Satellite configuration, track your Satellite activity and upload a sync file from Satellite to Cisco Smart Software Licensing.

Check out our Resources-on-Demand:
- ✓ Introduction to Cisco SSM satellite
- ✓ Smart Software Manager satellite Enhanced Edition Setup
- ✓ User Guide

Alerts | Inventory | Convert to Smart Licensing | Reports | Preferences | **Satellites**

Satellites 7.1

| New satellite... | ⎘ |

Name	Product Instances	Last Synchronization	Synchron

8. View License Activity

8.1. Use the **Activity** tab to view all license transactions and the event log of all activities happening in the Smart Account.

Additional Support

For Smart Account questions, open a case using Support Case Manager

For Smart Licensing questions, open a case using Support Case Manager

Information Links:
- **Cisco Smart Software Licensing Homepage**
- **Cisco Smart Accounts Homepage**