



Cisco Software:User Groups

Quick Guide for Partners & Customers

Note: Screens in the presentation may vary slightly from the actual tools

Manage User Groups

Manage Smart Accounts – User Groups


User Groups

Partner Organizations can efficiently manage large volumes of Customers and their assets by creating **User Groups** within a **Smart Account**. **User Groups** will make it easier for you to manage access for multiple Users, instead of managing Users individually.

User Group owners can add any number of Users to a group and define Smart Account and Virtual Account access for these users at the Group level.

The screenshot shows the Cisco Software Central interface for managing a Smart Account. The breadcrumb trail is 'Cisco Software Central > Manage Smart Account'. The current Smart Account is 'Cisco Demo Customer Smart Account'. The navigation tabs are 'Account Properties', 'Virtual Accounts', 'Users', 'Custom Tags', 'Requests', 'Account Agreements', and 'Event Log'. The 'Users' section is active, and the 'User Groups' sub-section is highlighted. Below the sub-section are buttons for 'Create User Group...', 'Assign Group from Another Smart Account...', 'Delete Selected...', and 'Export Selected...'. A table lists existing user groups with columns for selection, User Group, Smart Account, Account Access, Role, Users, Group Owners, and Actions.

<input type="checkbox"/>	User Group	Smart Account	Account Access	Role	Users	Group Owners	Actions
<input type="checkbox"/>	Group 1	Cisco Demo Customer	DEFAULT and its Child Virtual Accounts Frost Family and its C...	Virtual Account User Virtual Account User	1	Guna	Actions
<input type="checkbox"/>	jp	Cisco Demo Customer	-	-	1	Masa	Actions
<input type="checkbox"/>	test engineers	Cisco Demo Customer	-	-	2	Aleks Olga I	Actions

 This option is especially recommended for Partners and Service Providers with broad sets of Customers.

Manage Smart Accounts – User Groups

Create User Group

- 1 To create a new User Group, go to the **Users** tab and then 2 go to the **User Groups** sub-tab.
- 3 Click on **Create User Group**.

Cisco Software Central > Manage Smart Account Cisco Demo Customer Smart Account

Account Properties | Virtual Accounts **Users** Custom Tags | Requests | Account Agreements | Event Log

Users

Users **User Groups**

Create User Group... Assign Group from Another Smart Account... Delete Selected... Export Selected...

<input type="checkbox"/>	User Group	Smart Account	Account Access	Role	Users	Group Owners	Actions
<input type="checkbox"/>	Group 1	Cisco Demo Customer	DEFAULT and its Child Frost Family and its C	Virtual Account User Virtual Account User	1		Actions
<input type="checkbox"/>	jp	Cisco Demo Customer	-	-	1		Actions
<input type="checkbox"/>	test engineers	Cisco Demo Customer	-	-	2		Actions

Manage Smart Accounts – User Groups

Create User Group

- 1 In Step 1, Select Name and Users, enter the User Group Name (mandatory) and a Description (optional).
- 2a You can either Add Users Manually or 2b Import Users from CSV File.

Cisco Software Central > Manage Smart Account Cisco Demo Customer Smart Account

[Account Properties](#) | [Virtual Accounts](#) | [Users](#) | [Custom Tags](#) | [Requests](#) | [Account Agreements](#) | [Event Log](#)

Accounts

STEP 1
Select Name and Users

STEP 2
Assign to Accounts

Group Name and Users

Choose the group name and the users in the group

1 *Group Name:

Description:

2a Method:

Users to Add Make owner

[Account Properties](#) | [Virtual Accounts](#) | [Users](#) | [Custom Tags](#) | [Requests](#) | [Account Agreements](#) | [Event Log](#)

Accounts

STEP 1
Select Name and Users

STEP 2
Assign to Accounts

STEP 3
Review

Group Name and Users

Choose the group name and the users in the group

1 *Group Name:

Description:

2b Method:

Manage Smart Accounts – User Groups

Create User Group

- When adding Users Manually, enter the Users' Cisco User IDs or email addresses. *Optionally, you can make the User a Group owner by ticking the **Make Owner** checkbox.*
- Click on **Add**.
- The User details will be automatically populated below, including User, Email Address, Organization.
- Select **Next** to proceed.

The screenshot shows a web interface for creating a user group. At the top, there are navigation links: Account Properties, Virtual Accounts, Users, Custom Tags, Requests, Account Agreements, and Event Log. Below this is a progress bar with three steps: STEP 1 (Select Name and Users), STEP 2 (Assign to Accounts), and STEP 3 (Review). The main section is titled 'Group Name and Users' and contains the following fields:

- * Group Name: Test User Group for Training
- Description: Test User Group for Training Purposes
- Method: Add Users Manually
- Users to Add: Cisco user ID's or email addresses, comma separated
- Make owner:
- Add button

Below these fields is a table with the following columns: Owner, User, Email Address, Organization, and Actions. The table contains one row with the following data:

Owner	User	Email Address	Organization	Actions
<input checked="" type="checkbox"/>	TEST TEST testtest	test@test.com	TELSTRA ITG	Remove...

At the bottom of the form, there are 'Cancel' and 'Next' buttons. A red box highlights the 'Next' button, and a red circle with the number 6 is placed above it. Other red circles with numbers 3, 4, and 5 are placed over the 'Users to Add' field, the 'Add' button, and the table header respectively.

Manage Smart Accounts – User Groups

Create User Group

- 1 You are redirected to **Step 2: Assign Accounts**. This step is optional: you can assign the User Group to Accounts (optionally).

Click on **Assign Account Access**.

The screenshot shows a web interface for creating a user group. At the top, there is a breadcrumb trail: Account Properties | Virtual Accounts | Users | Custom Tags | Requests | Account Agreements | Event Log. Below this, the 'Accounts' section features a progress indicator with three steps: STEP 1 (Select Name and Users, marked with a green check), STEP 2 (Assign to Accounts, highlighted in grey), and STEP 3 (Review). The main heading is 'Assign the User Group to Accounts (Optional)', followed by the instruction 'Select the accounts the users can access and the functions they can perform.' A red circle with the number '1' highlights a button labeled 'Assign Account Access...'. Below the button is a table with three columns: 'Account', 'Scope', and 'Role'. Each column contains a dropdown menu. The table is currently empty, and the text 'No Assigned Accounts' is centered below it. At the bottom right, it says '0 Assignments'. At the bottom left, there are three buttons: 'Cancel', 'Back', and 'Next'.

Account Properties | Virtual Accounts | Users | Custom Tags | Requests | Account Agreements | Event Log

Accounts

STEP 1 ✓
Select Name and Users

STEP 2
Assign to Accounts

STEP 3
Review

Assign the User Group to Accounts (Optional)

Select the accounts the users can access and the functions they can perform.

1 Assign Account Access...

Account	Scope	Role

No Assigned Accounts

0 Assignments

Cancel Back Next

Manage Smart Accounts – User Groups

Create User Group

- 2 Select a User Role: Virtual Account Administrator or Virtual Account User.

Cisco Software Central > Manage Smart Account Cisco Demo Customer Smart Account

[Account Properties](#) | [Virtual Accounts](#) | [Users](#) | [Custom Tags](#) | [Requests](#) | [Account Agreements](#) | [Event Log](#)

Accounts

STEP 1 ✓

Select Name and Users

STEP 2

Assign to Accounts

STEP 3

Review

Scope of Access: Selected Virtual Accounts

2 User Role:

Ok Cancel

- Virtual Account Administrator
- Virtual Account User

Manage Smart Accounts – User Groups

Create User Group

- 3 After selecting a User Role (Virtual Account Administrator or Virtual Account User), you need to select one or more Virtual Accounts from the list of Available Virtual Accounts.
- 4 You can search by Name or Tag and tick the checkboxes to select Virtual Accounts.
- 5 You can either assign access to Virtual Account Only, or assign access to Virtual Account and its Children*.
- 6 The Assigned Virtual Accounts will be shown on the right-hand side of the page.
- 7 To confirm, click **Ok**.

Accounts

STEP 1 ✓
Select Name and Users

STEP 2
Assign to Accounts

Scope of Access: Selected Virtual Accounts

User Role: Virtual Account Administrator

Available Virtual Accounts: By Name | By Tag

Virtual Account	Description
<input checked="" type="checkbox"/> 1_EMEAR Demo	1_EMEAR Demo
<input checked="" type="checkbox"/> 2_EMEAR Demo	2_EMEAR Demo
<input type="checkbox"/> EMEAR FRANCE COLLAB RE...	A ANNULER

Assigned Virtual Accounts: By Name | By Tag

Virtual Account	Scope
<input checked="" type="checkbox"/> 1_EMEAR Demo	Account and Children
<input checked="" type="checkbox"/> 2_EMEAR Demo	Account Only

Buttons: Assign Account and Children, Assign Account Only, Unassign Selected, Unassign All

7 Ok Cancel

*Assign access to Virtual Account and Children: this option is applicable if you have multiple levels of Virtual Accounts (Nested Virtual Accounts).

Manage Smart Accounts – User Groups

Create User Group

- 8 The assigned Account Access for the New User Group will be displayed in Step 2. You can view the Virtual Account Name, Scope of access and Role (Virtual Account Administrator or User).
- 9 Click on **Next** to proceed

The screenshot shows a web interface for creating a user group. At the top, there are navigation links: Account Properties, Virtual Accounts, Users, Custom Tags, Requests, Account Agreements, and Event Log. Below this is a progress bar with three steps: STEP 1 (Select Name and Users) with a green checkmark, STEP 2 (Assign to Accounts) which is highlighted in grey, and STEP 3 (Review). The main section is titled 'Assign the User Group to Accounts (Optional)' and includes the instruction 'Select the accounts the users can access and the functions they can perform.' There is a button labeled 'Assign Account Access...'. Below this is a table with three columns: Account, Scope, and Role. The table contains two rows of data. A red box highlights the table and the 'Next' button at the bottom. A red circle with the number '8' is next to the table, and another red circle with the number '9' is next to the 'Next' button.

Account	Scope	Role
1_EMEAR Demo	Account and its Children	Virtual Account Administrator
2_EMEAR Demo	Account Only	Virtual Account Administrator

2 Assignments

Buttons: Cancel, Back, Next

Manage Smart Accounts – User Groups

Create User Group

- 1 In **Step 3, Review**, the User Group information is displayed for a final review: you can check Group Name and Description, list of Users and Account Access (proposed role assignment).
- 2 If the information listed is correct, click on **Create User Group** to complete the process.

Accounts

STEP 1 ✓
Select Name and Users | STEP 2 ✓
Assign to Accounts | STEP 3
Review

Review

Group Name: Test User Group for Training
Description: Test User Group for Training Purposes

Users			
Owner	User	Email Address	Organization
	<input type="text"/>	<input type="text"/>	<input type="text"/>
✓	TEST TEST testtest	test@test.com	TELSTRA ITG

1 User

Account Access		
Account	Scope	Assignment Source
<input type="text"/>	<input type="text"/>	<input type="text"/>
1_EMEAR Demo	Account and its Children	Virtual Account Administrator
2_EMEAR Demo	Account Only	Virtual Account Administrator

2 Assignments

Cancel Back Create User Group

Manage Smart Accounts – User Groups

Create User Group

- 1 The newly created User Group will appear in the Users tab, in the User Groups sub-tab. You can view the User Group name, Smart Account, Account Access, Role, Users, Group Owners and Actions.

Cisco Software Central > Manage Smart Account

Cisco Demo Customer Smart Account

Account Properties | Virtual Accounts | **Users** | Custom Tags | Requests | Account Agreements | Event Log

Users

Users | **User Groups**

Create User Group... Assign Group from Another Smart Account... Delete Selected... Export Selected...

<input type="checkbox"/>	User Group	Smart Account	Account Access	Role	Users	Group Owners	Actions
<input type="checkbox"/>	Test User Group for Training	Cisco Demo Customer Sma	1_EMEAR Demo and its Ch 2_EMEAR Demo	Virtual Account Administrato Virtual Account Administrato	2	Anna Skocka TEST TEST	Actions

Manage Smart Accounts – User Groups

User Group – Actions

- 1 Under **Actions**, you can **Edit the Users in the Group**, **Send a Message to the Group Members**, **Edit the Accounts the Group can Access**, **Request Access to Another Smart Account** or **Delete the Group**.

The screenshot shows the Cisco Software Central interface for managing a Smart Account. The breadcrumb trail is 'Cisco Software Central > Manage Smart Account'. The current Smart Account is 'Cisco Demo Customer Smart Account'. The navigation menu includes 'Account Properties', 'Virtual Accounts', 'Users', 'Custom Tags', 'Requests', 'Account Agreements', and 'Event Log'. The 'Users' section is active, with tabs for 'Users' and 'User Groups'. Below the tabs are buttons for 'Create User Group...', 'Assign Group from Another Smart Account...', 'Delete Selected...', and 'Export Selected...'. A table lists user groups with columns for 'User Group', 'Smart Account', 'Account Access', 'Role', 'Users', 'Group Owners', and 'Actions'. The 'Test User Group for Training' is selected, and its 'Actions' menu is open, showing options: 'Edit the Users in the Group...', 'Send a Message to the Group Members...', 'Edit the Accounts the Group can Access...', 'Request Access to Another Smart Account...', and 'Delete the Group...'. A red circle with the number '1' is placed over the 'Actions' column header and the menu options.

User Group	Smart Account	Account Access	Role	Users	Group Owners	Actions
<input type="checkbox"/> Test User Group for Training	Cisco Demo Customer Sma	1_EMEAR Demo and its Ch 2_EMEAR Demo	Virtual Account Administrato Virtual Account Administrato	2 1 1 2	Anna Skocka	Actions

Manage Smart Accounts – User Groups

Actions – Edit the Users in the Group

1 To edit Users, click on **Actions** → **Edit the Users in the Group**.

The screenshot shows the Cisco Software Central interface for managing a Smart Account. The breadcrumb trail is "Cisco Software Central > Manage Smart Account". The current page is "Users" under the "User Groups" tab. The interface includes a table with columns: User Group, Smart Account, Account Access, Role, Users, Group Owners, and Actions. A red circle highlights the "Actions" button in the first row of the table. A dropdown menu is open, showing the following options: "Edit the Users in the Group...", "Send a Message to the Group Members...", "Edit the Accounts the Group can Access...", "Request Access to Another Smart Account...", and "Delete the Group...".

User Group	Smart Account	Account Access	Role	Users	Group Owners	Actions
Test User Group for Training	Cisco Demo Customer Sma	1_EMEAR Demo and its Ch 2_EMEAR Demo	Virtual Account Administrato Virtual Account Administrato	2	Anna Skocka	Actions
				1		
				1		
				2		

Manage Smart Accounts – User Groups

Actions – Edit the Users in the Group

- 1 In the **General** sub-tab, you can **Add Users**.

The screenshot shows the 'Edit User Group' interface for 'Test User Group for Training'. The 'General' tab is active, and the 'Add Users...' button is highlighted with a red circle and the number 1. The interface includes a breadcrumb trail at the top, a title bar, and a main content area with a form and a table.

Account Properties | Virtual Accounts | Users | Custom Tags | Requests | Account Agreements | Event Log

Edit User Group - Test User Group for Training

General | Assigned Accounts

Name:

Description:

1 Add Users... | Send Message to Users...

Owner	User	Email Address	User Group	Organization	Actions
	<input type="text"/>	<input type="text"/>	<input type="text" value="▼"/>	<input type="text"/>	
<input checked="" type="checkbox"/>	Anna Skocka	askocka@cisco.com	Test User Group for Training Deployment Engineers Test User Group AS	Cisco Systems, Inc.	-
<input checked="" type="checkbox"/>	TEST TEST	test@test.com	Test User Group for Training	TELSTRA ITG	Remove...

2 Users

Ok | **Cancel**

Manage Smart Accounts – User Groups

Actions – Edit the Users in the Group – Add Users

- 2 You can add Users Manually (or 2a Import from CSV file).
- 3 To Add Users Manually, enter the Users' Cisco User IDs or email addresses. *Optionally, you can make the User a Group owner by ticking the Make Owner checkbox.*
- 4 Click on Add.
- 5 The User details will be automatically populated below, including User, Email Address, Organization.
- 6 Select Ok to proceed and add the User(s) to the User Group.

Account Properties | Virtual Accounts | Users | Custom Tags | Requests | Account Agreements | Event Log

Add Users to User Group - Test User Group for Training

In order to be granted access to your Smart Account, your users must have a Cisco.com ID.
Enter the users' Cisco.com ID's or email addresses, and click Add.
You can also upload a file of users.

Method: **2** Add Users Manually

Users to Add: Make owner **4** Add

5	Owner	User	Email Address	Organization	Actions
		<input type="text"/>	<input type="text"/>	<input type="text"/>	
<input checked="" type="checkbox"/>		TEST TEST testtest	test@test.com	TELSTRA ITG	Remove...

6

Account Properties | Virtual Accounts | Users | Custom Tags | Requests | Account Agreements | Event Log

Add Users to User Group - Test User Group for Training

In order to be granted access to your Smart Account, your users must have a Cisco.com ID.
Enter the users' Cisco.com ID's or email addresses, and click Add.
You can also upload a file of users.

Method: **2a** Import from CSV File

Manage Smart Accounts – User Groups

Actions – Edit the Users in the Group – Remove Users

- 1 To remove a User from the User Group, click on Remove under Actions.
- 2 To confirm, click Ok

Account Properties | Virtual Accounts | Users | Custom Tags | Requests | Account Agreements | Event Log

Add Users to User Group - Test User Group for Training

In order to be granted access to your Smart Account, your users must have a Cisco.com ID.
Enter the users' Cisco.com ID's or email addresses, and click Add.
You can also upload a file of users.

Method:

Users to Add: Make owner

Owner	User	Email Address	Organization	Actions
	<input type="text"/>	<input type="text"/>	<input type="text"/>	
<input checked="" type="checkbox"/>	TEST TEST testtest	test@test.com	TELSTRA ITG	<input type="button" value="Remove..."/>

Manage Smart Accounts – User Groups

Actions – Send Message to User Group Members

- 1 To send a message to the Group, click on **Actions** → **Send a Message to the Group Members**.

Cisco Software Central > Manage Smart Account Cisco Demo Customer Smart Account

[Account Properties](#) | [Virtual Accounts](#) | [Users](#) | [Custom Tags](#) | [Requests](#) | [Account Agreements](#) | [Event Log](#)

Users

Users | **User Groups**

Create User Group... Assign Group from Another Smart Account... Delete Selected... Export Selected...

<input type="checkbox"/>	User Group	Smart Account	Account Access	Role	Users	Group Owners	Actions
<input type="checkbox"/>							
<input type="checkbox"/>	Test User Group for Trai	Cisco Demo Customer S	1_EMEAR Demo and its 2_EMEAR Demo	Virtual Account Administ Virtual Account Administ	2	Anna Skocka	Actions
<input type="checkbox"/>					1		
<input type="checkbox"/>					1		
<input type="checkbox"/>					2		

- Edit the Users in the Group...
- Send a Message to the Group Members...**
- Edit the Accounts the Group can Access...
- Request Access to Another Smart Account...
- Delete the Group...

Manage Smart Accounts – User Groups

Actions – Send Message to User Group Members

- 2 You can send a message to **All Users** within the User Group, to **User Group Owners** or to **User Group Members**.
- 3 Type a message in the **Message** field.
- 4 Click on **Send**.

The screenshot shows a dialog box titled "Send Message to User Group" with a close button (X) in the top right corner. Below the title is a horizontal line. The first field is labeled "USER GROUP *" and contains the text "Test User Group for Training". A red callout box with the number "2" highlights a dropdown menu currently showing "All Users". The dropdown menu is open, showing three options: "All Users", "User Group Owners", and "User Group Members". Below this is a "Message *" field containing the text "Test Message for training development purposes". A red callout box with the number "3" highlights this text area. At the bottom right, there are two buttons: "Cancel" and "Send". A red callout box with the number "4" highlights the "Send" button.

Manage Smart Accounts – User Groups

Actions – Edit the Accounts the Group can Access

- 1 You can edit the Virtual Accounts the Group can access:
Click on **Actions** → **Edit the Accounts the Group can Access**.

Cisco Software Central > Manage Smart Account Cisco Demo Customer Smart Account

[Account Properties](#) | [Virtual Accounts](#) | [Users](#) | [Custom Tags](#) | [Requests](#) | [Account Agreements](#) | [Event Log](#)

Users

[Users](#) | [User Groups](#)

Create User Group... Assign Group from Another Smart Account... Delete Selected... Export Selected...

<input type="checkbox"/>	User Group	Smart Account	Account Access	Role	Users	Group Owners	Actions
<input type="checkbox"/>	Test User Group for T	Cisco Demo Custom	1_EMEAR Demo and 2_EMEAR Demo	Virtual Account Admin Virtual Account Admin	2	Anna Skocka	Actions
<input type="checkbox"/>					1		
<input type="checkbox"/>					1		
<input type="checkbox"/>					2		

- Edit the Users in the Group...
- Send a Message to the Group Members...
- Edit the Accounts the Group can Access...**
- Request Access to Another Smart Account...
- Delete the Group...

Manage Smart Accounts – User Groups

Actions – Edit the Accounts the Group can Access

1 Edit the Accounts the Group can Access: you are redirected to the **Assigned Accounts** sub-tab, where you can:

1a Assign Account Access

1b Request Access to Another Smart Account

The screenshot shows the Cisco Software Central interface for managing smart accounts. The breadcrumb trail is "Cisco Software Central > Manage Smart Account". The current smart account is "Cisco Demo Customer Smart Account". The navigation tabs include "Account Properties", "Virtual Accounts", "Users", "Custom Tags", "Requests", "Account Agreements" (with a notification badge), and "Event Log". The main heading is "Edit User Group - Test User Group for Training". There are two tabs: "General" and "Assigned Accounts". The "Assigned Accounts" tab is active, showing a table of assigned accounts. Two buttons are highlighted with red circles and lines: "1a Assign Account Access..." and "1b Request Access to Another Smart Account".

Account	Scope	Role	Actions
<input type="text"/>	<input type="text"/>	<input type="text"/>	
1_EMEAR Demo	Account and its Children	Virtual Account Administrator	Unassign...
2_EMEAR Demo	Account Only	Virtual Account Administrator	Unassign...

2 Assignments

Manage Smart Accounts – User Groups

Actions – Edit the Accounts the Group can Access

- 2a After clicking on **Assign Account Access** you are redirected to **Assign Accounts to the User Group**. Select a **User Role: Virtual Account Administrator** or **Virtual Account User**.

Cisco Software Central > Manage Smart Account

[Account Properties](#) | [Virtual Accounts](#) | [Users](#) | [Custom Tags](#) | [Requests](#) | [Account Agreements](#) | [Event Log](#)

Assign Accounts to the User Group

Select the accounts the users can access and the functions they can perform.

2a

Scope of Access: Selected Virtual Accounts

User Role:

- Virtual Account Administrator
- Virtual Account User

Manage Smart Accounts – User Groups

Actions – Edit the Accounts the Group can Access

- 3a After selecting a User Role (Virtual Account Administrator or Virtual Account User), you need to select one or more Virtual Accounts from the list of Available Virtual Accounts.
- 4a You can search by Name or Tag and tick the checkboxes to select Virtual Accounts.
- 5a You can either assign access to Virtual Account Only, or assign access to Virtual Account and its Children*
- 6a The Assigned Virtual Accounts will be shown on the right-hand side of the page.
- 7a To confirm, click Ok.

*Assign access to Virtual Account and Children: this option is applicable if you have multiple levels of Virtual Accounts (Nested Virtual Accounts).

Assign Accounts to the User Group

Select the accounts the users can access and the functions they can perform.

Scope of Access: Selected Virtual Accounts

User Role:

Available Virtual Accounts:

By Name | By Tag

EMEAR

Virtual Account	Description
<input checked="" type="checkbox"/> 1_EMEAR Demo	1_EMEAR Demo
<input checked="" type="checkbox"/> 2_EMEAR Demo	2_EMEAR Demo
<input type="checkbox"/> EMEAR_hubertg	Virtual account for training purposes
<input type="checkbox"/> EMEAR FRANCE COLLAB RE...	A ANNULER
<input type="checkbox"/> IOT-TSA-EMEAR	Account for demo's for IOT TSA Team

Assigned Virtual Accounts:

By Name | By Tag

Search

Virtual Account	Scope
<input checked="" type="checkbox"/> 1_EMEAR Demo	Account and Children
<input checked="" type="checkbox"/> 2_EMEAR Demo	Account Only

Assign Account and Children

Assign Account Only

Unassign Selected

Unassign All

Ok Cancel

Manage Smart Accounts – User Groups

Actions – Request Access to Another Smart Account

- 1 You can request access to an existing Smart Account for the User Group.
Click on **Actions** → **Request Access to Another Smart Account**.

The screenshot shows the Cisco Software Central interface for managing smart accounts. The breadcrumb trail is "Cisco Software Central > Manage Smart Account". The current smart account is "Cisco Demo Customer Smart Account". The navigation menu includes "Account Properties", "Virtual Accounts", "Users", "Custom Tags", "Requests", "Account Agreements", and "Event Log". The "Users" section is active, with tabs for "Users" and "User Groups".

At the top of the "User Groups" section, there are buttons for "Create User Group...", "Assign Group from Another Smart Account...", "Delete Selected...", and "Export Selected...". Below these is a table with the following columns: "User Group", "Smart Account", "Account Access", "Role", "Users", "Group Owners", and "Actions".

User Group	Smart Account	Account Access	Role	Users	Group Owners	Actions
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>		<input type="text"/>	
<input type="checkbox"/>	Cisco Demo Customer S	1_EMEAR Demo and its 2_EMEAR Demo	Virtual Account Administ Virtual Account Administ	2	Anna Skocka	Actions
<input type="checkbox"/>				1		
<input type="checkbox"/>				1		
<input type="checkbox"/>				2		

The "Actions" dropdown menu for the first row is open, showing the following options:

- Edit the Users in the Group...
- Send a Message to the Group Members...
- Edit the Accounts the Group can Access...
- Request Access to Another Smart Account...**
- Delete the Group...

Manage Smart Accounts – User Groups

Actions – Request Access to Another Smart Account

- 1 Enter the email address of the known contact from the End Customer organization.
- 2 Add a note/message for the Request Approver.
- 3 Click on Send.

Cisco Software Central > Manage Smart Account

Cisco Demo Customer Smart Account

Account Properties | Virtual Accounts | Users | Custom Tags | Requests | Account Agreements ¹ | Event Log

Request Access to External Smart Accounts

1 askocka@cisco.com

2 Please grant me access to External Smart Account to this User Group

3 Send

REQUEST CODE	SENT ON	SENT TO	STATUS	ACTION
There are no email notifications				

NOTE: You can allow resellers authorized by Cisco to resell our products (your "Authorized Channel") access to your Smart Account, if you chose. You can add additional Authorized Channels or stop access through this tool at any time. By clicking on and creating a New User, you agree that your Authorized Channel is acting on your behalf, that you are responsible for your Authorized Channels' actions and that you affirmatively grant your Authorized Channel(s) access to any information in your Smart Account.

Close



The End Customer contact could be the Administrator within the End Customer's Smart Account or can forward the request to the Administrator for approving the request.

Manage Smart Accounts – User Groups

Actions – Request Access to Another Smart Account

- 4 A confirmation message will be displayed informing you that the request has been successfully sent.
- 5 The Request Code for the request is also displayed.
- 6 You can also resend the request if required by clicking on Resend.
- 7 Click on Close.

The screenshot shows the Cisco Software Central interface for managing smart accounts. The breadcrumb trail is "Cisco Software Central > Manage Smart Account". The current account is "Cisco Demo Customer Smart Account". The navigation menu includes "Account Properties", "Virtual Accounts", "Users", "Custom Tags", "Requests", "Account Agreements" (with a notification badge), and "Event Log".

The main heading is "Request Access to External Smart Accounts". A confirmation message is displayed, indicating that the request was successfully sent to askocka@cisco.com. Below the message is a "Send another request" button.

A table lists the requests. The first row is highlighted with a red box around the "REQUEST CODE" column, which contains the value "LVPTGZIW". The "ACTION" column for this row contains a "Resend" link, also highlighted with a red box.

At the bottom of the interface, there is a "Close" button, highlighted with a red box.

REQUEST CODE	SENT ON	SENT TO	STATUS	ACTION
LVPTGZIW	04-09-2020 10:19 AM	askocka@cisco.com	Pending	Resend

NOTE: You can allow resellers authorized by Cisco to resell our products (your "Authorized Channel") access to your Smart Account, if you chose. You can add additional Authorized Channels or stop access through this tool at any time. By clicking on and creating a New User, you agree that your Authorized Channel is acting on your behalf, that you are responsible for your Authorized Channels' actions and that you affirmatively grant your Authorized Channel(s) access to any information in your Smart Account.

Manage Smart Accounts – User Groups

Delete User Group

- 1 To delete the User Group, click on **Actions** → **Delete the Group**.
- 2 Confirm by clicking on **Delete User Group**.

The screenshot shows the Cisco Software Central interface for managing smart accounts. The 'Users' section is active, displaying a table of user groups. A context menu is open over the 'Test User Group for Trai' row, with 'Delete the Group...' selected. A 'Delete User Group' dialog box is open, asking for confirmation to delete the group and its members. The 'Delete User Group' button in the dialog is highlighted with a red box and a red arrow pointing from the 'Delete the Group...' option in the context menu.

Users

Users | **User Groups**

Create User Group... Assign Group from Another Smart Account... Delete Selected... Export Selected...

User Group	Smart Account	Account Access	Role	Users	Group Owners	Actions
<input type="checkbox"/> Test User Group for Trai	Cisco Demo Customer S	1_EMEAR Demo and its 2_EMEAR Demo	Virtual Account Administ Virtual Account Administ	2	Anna Skocka	Actions
<input type="checkbox"/> Group 1	Cisco Demo Customer S	DEFAULT and its Childre Frost Family and its Chil	Virtual Account User Virtual Account User	1		
<input type="checkbox"/> jpsasl	Cisco Demo Customer S	-	-	1		
<input type="checkbox"/> test engineers	Cisco Demo Customer S	-	-	2		

Delete User Group

Are you sure you want to delete this user group?
The users in the group will lose access to any accounts the group is assigned to.
 Send email notification to group members

Delete User Group Cancel

Manage Smart Accounts – User Groups

Assign Group from Another Smart Account

The Smart Account Administrator can Assign Group from Another Smart Account.

- 1 Select a User Group by ticking the checkbox on the left-hand side.
- 2 Click on Assign Group from Another Smart Account.

The screenshot shows the Cisco Software Central interface for managing smart accounts. The breadcrumb trail is 'Cisco Software Central > Manage Smart Account'. The current smart account is 'Cisco Demo Customer Smart Account'. The navigation menu includes 'Account Properties', 'Virtual Accounts', 'Users', 'Custom Tags', 'Requests', 'Account Agreements', and 'Event Log'. The 'Users' section is active, and the 'User Groups' tab is selected. The 'Assign Group from Another Smart Account...' button is highlighted with a red box and a '2' in a red circle. The 'Test User Group for Trai' row in the table has its checkbox highlighted with a red box and a '1' in a red circle.

<input type="checkbox"/>	User Group	Smart Account	Account Access	Role	Users	Group Owners	Actions
<input type="checkbox"/>							
<input checked="" type="checkbox"/>	Test User Group for Trai	Cisco Demo Customer S	1_EMEAR Demo and its 2_EMEAR Demo	Virtual Account Administ Virtual Account Administ	2	Anna Skocka TEST TEST	Actions
<input type="checkbox"/>					1	Gunaseelan Radha	Actions
<input type="checkbox"/>					1	Masato Ueoka	Actions

Manage Smart Accounts – User Groups

Assign Group from Another Smart Account

- 1 The **Smart Account Administrator** can **approve Smart Account Access to External User Group**.
If you received an email requesting you to allow users from another Smart Account to have access to your Smart Account, follow these steps:
 - Enter the Request Lookup ID
 - Confirm that the User Group should be given access to your Smart Account
 - Select the role the Users should have, and the Virtual Accounts they should have access to

Cisco Software Central > Manage Smart Account Cisco Demo Customer Smart Account

[Account Properties](#) | [Virtual Accounts](#) | [Users](#) | [Custom Tags](#) | [Requests](#) | [Account Agreements](#) ¹ | [Event Log](#)

Approve Smart Account Access to External User Group

If you received an email requesting you to allow users from another Smart Account to have access to your Smart Account, follow these steps:

- 1) Enter the Request Look up ID provided in the email
- 2) Confirm that the user group should be given access
- 3) Select the role the users should have, and the virtual accounts they should have access to

REQUEST LOOKUP ID *

LVPTGZIW

Cancel Continue

Manage Smart Accounts – User Groups

Export User Groups

- 1 To Export multiple Users Groups to a .csv/.xls file, select all User Groups by ticking the checkbox next to User Group, or tick the checkboxes next to selected User Groups.
- 2 Click on Export Selected.
- 3 You will download a .csv/.xls file, containing the list of selected User Groups (including User Group, User Group Description, Smart Account, Account Access, Role, User, CCOID, Email Address, Group Owner).

The screenshot shows the Cisco Software Central interface for managing smart accounts. The 'Users' section is active, and the 'User Groups' tab is selected. A red box highlights the 'Export Selected...' button, with a red arrow pointing to a preview of the exported data table. The table contains the following information:

User Group	User Group Description	Smart Account	Account Access	Role	User	CCO ID	Email Address	Group Owner
Test User Group for T	Test User Group for T	Cisco Demo Customer1	_EMEAR Demo and i	Virtual Account Admin	A			EST
Test User Group for T	Test User Group for T	Cisco Demo Customer2	_EMEAR Demo	Virtual Account Admin	A			EST
Group 1		Cisco Demo Customer	DEFAULT and its Child	Virtual Account User	G			
Group 1		Cisco Demo Customer	Frost Family and its CI	Virtual Account User	G			

Manage Smart Accounts – User Groups

Delete User Groups

- 1 To remove multiple Users Groups , select all User Groups by ticking the checkbox next to User Group, or tick the checkboxes next to selected User Groups.
- 2 Click on Delete Selected.
- 3 Confirm by clicking on Delete User Group.

The screenshot shows the Cisco Software Central interface for managing smart accounts. The breadcrumb trail is 'Cisco Software Central > Manage Smart Account'. The navigation bar includes 'Account Properties', 'Virtual Accounts', 'Users', 'Custom Tags', 'Requests', 'Account Agreements', and 'Event Log'. The 'Users' section is active, with tabs for 'Users' and 'User Groups'. Below the tabs are buttons for 'Create User Group...', 'Assign Group from Another Smart Account...', 'Delete Selected...', and 'Export Selected...'. A table lists user groups with columns for checkboxes, User Group, Smart Account, Account Access, Role, Users, Group Owners, and Actions. Two user groups are selected: 'Test User Group for Trai' and 'Group 1'. A 'Delete User Group' dialog box is open, asking for confirmation to delete the selected user group and offering an option to send email notifications. A red box highlights the 'Delete User Group' button in the dialog, and a red arrow points from the 'Delete Selected...' button in the table to the dialog. A blue callout box contains a note.

Delete User Group

Are you sure you want to delete this user group?
⚠ The users in the group will lose access to any accounts the group is assigned to.
 Send email notification to group members

Delete User Group Cancel

Users

<input type="checkbox"/>	User Group	Smart Account	Account Access	Role	Users	Group Owners	Actions
<input checked="" type="checkbox"/>	Test User Group for Trai	Cisco Demo Customer S	1_EMEAR Demo and its 2_EMEAR Demo	Virtual Account Administ Virtual Account Administ	2	Anna Skocka TEST TEST	Actions
<input checked="" type="checkbox"/>	Group 1	Cisco Demo Customer S	DEFAULT and its Childre Frost Family and its Chil	Virtual Account User Virtual Account User	1	Gunaseelan Radha	Actions

Note:
Users Groups can be deleted only by a Smart Account Administrator.

