



Get Started with My Cisco Entitlements



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Document Purpose

My Cisco Entitlements (MCE) is a secure one-stop platform where you can gain insights into your business and better manage your Cisco products and services to minimize risk.

This document provides an overview of step 3 of the overall MCE onboarding process:

Step 1: Establish Anchor Location

TIP: Mandate Smart Account (SA) on All New Purchases (Optional)

Step 2: Assign Your Unassigned Assets & Entitlements

Step 3: Migrate User Access

Step 4: Use My Cisco Entitlements (MCE)

To learn about the other steps, please refer to the [“MCE Onboarding Overview”](#) document.

Audience

This document is intended for Cisco Customers and Partners.



Get Started with My Cisco Entitlements

Step 3: Migrate User Access

Complete the prerequisite steps, and steps 1 and 2 before proceeding to step 3 of **Getting Started with My Cisco Entitlements (MCE)**.



- ❑ Migrate user access to centrally manage and easily control who has access to what assets and entitlements and at what level.
- ❑ Only Smart Account (SA) Administrators can migrate user access.

Overview

In step 2 (Assign Your Unassigned Assets & Entitlements), you brought additional hardware and service entitlements into your Smart Account (SA) and organized them in your Virtual Accounts (VA). You now need to decide what you want each of your existing users to be able to access in your SA.

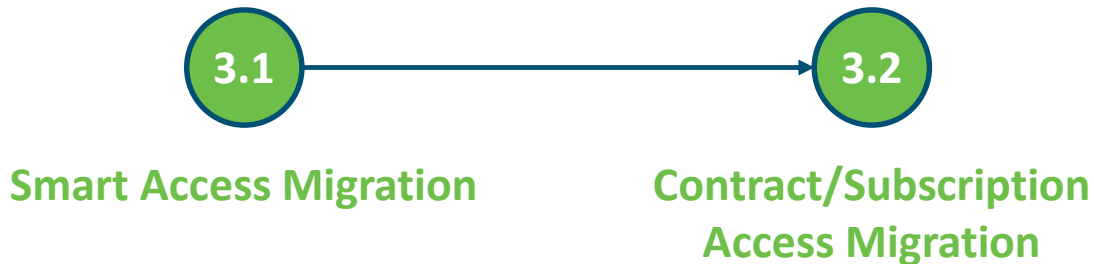
Prior to step 2, your SA and Virtual Accounts (VAs) only contained Licensing entitlements, so all existing users currently in your SA only had access to Licensing functions.

Similarly, users who are currently associated to your service contracts only have access to Services functions, but have access to those functions for all product entitlements on the entire contract.

Here in step 3, you will now unify your user access management in MCE, by merging these two sets of users.

Approach

The user access migration is a two step process:



Step 3.1 - Smart Access Migration

This is a one-time activity per SA, to migrate all of the existing users who have either SA User or VA User role. Users who have any other role, such as SA Administrator, VA Administrator, or SA Approver, will not be impacted.

Prior to step 2, your SA only contained Licensing entitlements, so the existing users with the SA User and VA User roles only had access to Licensing functions. In step 2, you brought additional hardware and service entitlements into your SA. You now need to decide what you want the existing users in your SA to be able to access.

- If you want to keep their access limited to only software related functions, migrate them to **License User** access. Then, they will only be able to perform licensing specific and software related actions, like Upgrade Software Version.



Step 3: Migrate User Access

- If you want to expand their level access further, to be able to access all of the new hardware and service entitlements that now reside in your SA, migrate them with **Full User** access. Then, they will still be able to perform all of the software specific actions, but will also be able to perform additional hardware and service actions, including RMAs.

Note: The level at which these users had access (SA or VA) will be retained with these new roles.

Here's a look at the various actions available for different roles:

Actions	Before	After	
	SA/VA User	SA/VA License User	SA/VA Full User
Download Software Image		✓	✓
Open TAC/Technical Case		✓	✓
Order Software Version Upgrade		✓	✓
View All		✓	✓
Perform RMA			✓
Use License	✓	✓	✓

Summary – Step 3.1

- ❑ This is a one time activity per SA.
- ❑ Before migration, users have SA/VA **User** access.
- ❑ After migration, users will have an increased level of access, SA/VA **License Users** or SA/VA **Full Users**, to perform additional actions.
- ❑ Please refer to [MCE Roles document](#) for details on all actions available for various roles.





Step 3: Migrate User Access

Step 3.2 - Contract/Subscription Access Migration

This is a one time activity per contract, to migrate the users that currently have support access to the contract, to grant them access to the SA and a unified user access experience through MCE. Users will be granted role-based access to the specific VA to which the contract entitlements were tagged in step 2 (Assign Your Unassigned Assets & Entitlements).

Prior to adding your contract entitlements to your VA in step 2, those VAs may have already contained Licensing entitlements. You now need to decide what you want the service contract users to be able to access in those VAs.

- If you want to keep their level of access the same as it was, migrate them with **VA Service User** access. Then, they will only be able to perform services-specific actions, like opening TAC cases, downloading software and requesting hardware RMA's, but will not be able to perform Licensing activities, like using licenses.
- If you want to expand their level access, to be able to access all of entitlements that reside in those VAs, migrate them to **VA Full User** access. Then, they will still be able to perform all of the hardware and service actions, like downloading software, opening TAC cases and processing RMAs, but will also be able to perform additional licensing specific actions.



Step 3: Migrate User Access

Step 3.2 - Contract/Subscription Access Migration (cont.)

Actions	Before	After	
	Contracts	VA Service Users	VA Full Users
Download Software Image	✓	✓	✓
Open TAC/Technical Case	✓	✓	✓
Order Software Version Upgrade	✓	✓	✓
View All		✓	✓
Perform RMA	✓	✓	✓
Use License			✓

Summary – Step 3.2



- ❑ This is a one time activity per contract/ subscription. You can migrate some or all of the users currently associated to the contract/ subscription.
- ❑ Before migration, these contract users may or may not have had a role to the SA.
- ❑ After migration, these contract users will have either **VA Service User** or **VA Full User** role to the SA.
- ❑ You will receive an email notification when the step 3.2 is complete.
- ❑ Please refer to [MCE Roles document](#) for details on all actions available for various roles.

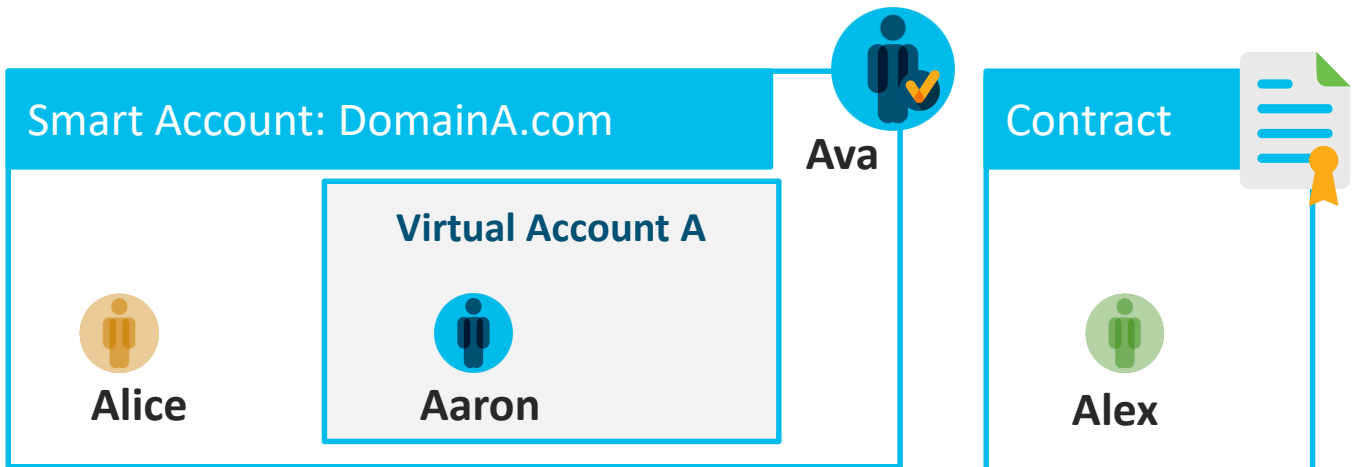


Step 3: Migrate User Access

Sample Examples

Example A: Consider a company with these users:

- Ava - SA Administrator
- Alice – SA User
- Aaron – VA User for VA A
- Alex – Contract User



The contract was tagged to VA A. During the user access migration, Ava selected **License User** in step 3.1, and selected **VA Service User** for the contract in step 3.2.

As a result, post access migration the users' roles are:

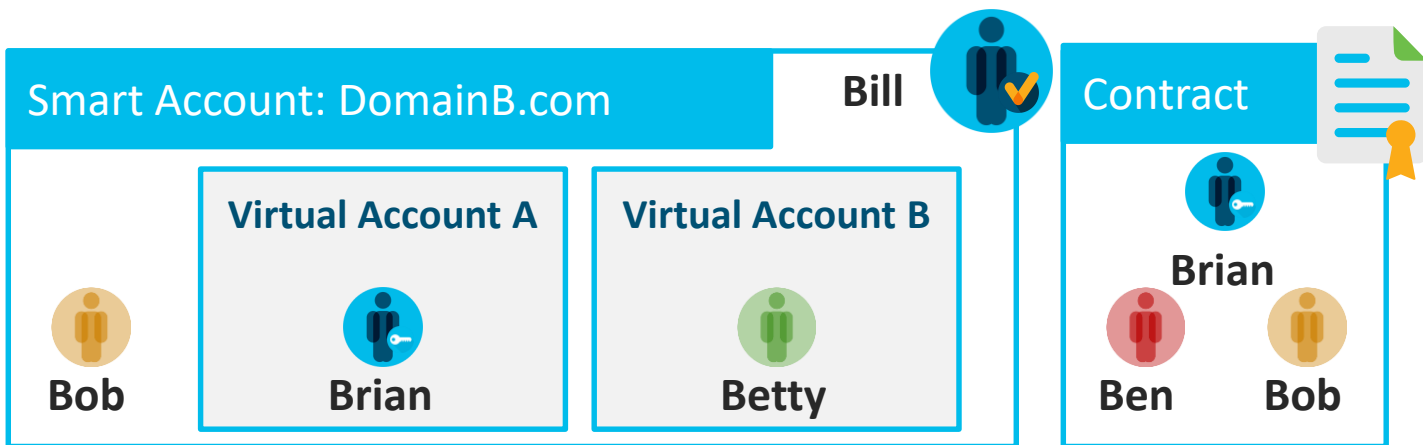
- Ava - SA Administrator
- Alice – SA License User
- Aaron – VA License User for VA A
- Alex – VA Service User for VA A



Step 3: Migrate User Access

Example B: Consider a company with these users

- Bill - SA Administrator
- Brian – VA A user and Contract user
- Betty – VA B user
- Ben – Contract user
- Bob – SA user and Contract user



Some contract lines were assigned to VA A and others were assigned to VA B. During the user access migration, Bill selected **Full User** in step 3.1, and selected **VA Service User** for the contract in step 3.2.

As a result, post access migration the users roles are:

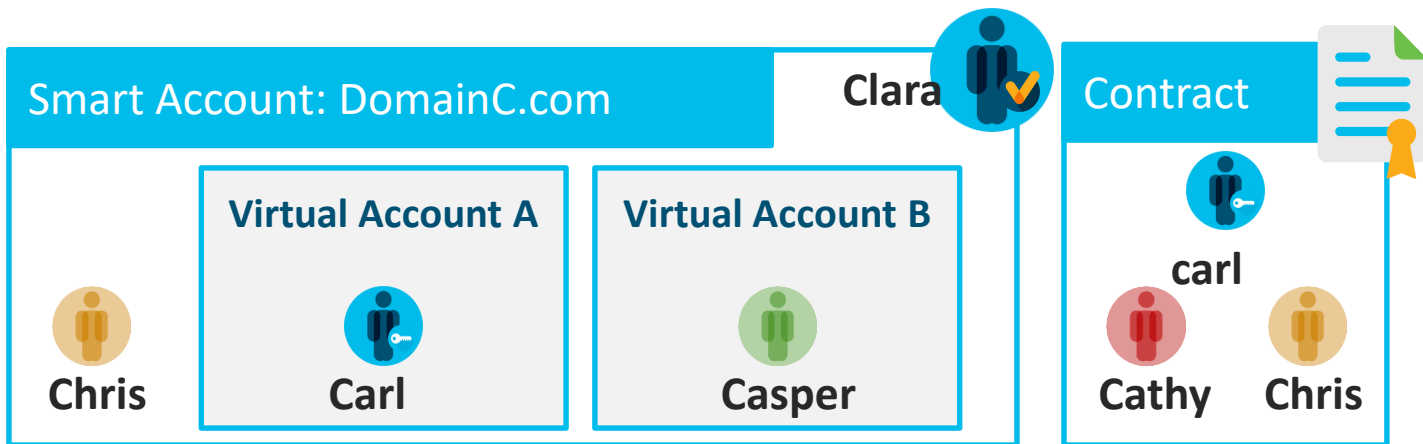
- Bill - SA Administrator
- Brian – Full User for VA A and Service User for VA B
- Betty – Full User for VA B
- Ben – Service User for VA A and VA B
- Bob – Full User for entire SA



Step 3: Migrate User Access

Example C: Consider a company with these users

- Clara - SA Administrator
- Chris – SA User and Contract user
- Casper - VA B user
- Carl – VA A user and Contract user
- Cathy – Contract user



Some contract lines were assigned to VA A and others were assigned to VA B. During the user access migration, Clara selected **License User** in step 3.1, and selected **VA Full User** for the contract in step 3.2, but removed Carl from the contract migration.



Step 3: Migrate User Access

As a result, post access migration the users roles are:

- Clara - SA Administrator
- Chris – Full User for entire SA
- Casper – License user for VA B
- Carl – Full User for VA A*
- Cathy – Full User for VA A and VA B

* During the 30 day grace period, the contract access will be retained in SAMT, so Brian will still have full access to all items in contract. After the grace period, Brian will only have access to the items that were assigned to the VA A.

Summary – Steps 3.1 & 3.2



- ❑ For a given user, the steps 3.1 and 3.2 will either retain the existing access levels or increase the access levels. These migration steps will never downgrade a user's existing access level.
- ❑ You will receive an email notification when step 3.2 is complete.
- ❑ After the migration is complete, review the role assignments through the **Manage Smart Account** link on software.cisco.com, and adjust as necessary.
- ❑ Please refer to [MCE Roles document](#) for details on all actions available for various roles.



Step 3: Migrate User Access

Step-by-step Instructions

Follow these step-by-step instructions for user migration:

- In the **Services & Subscription** tab, select the **Assigned** view from the **Inventory View** filter.
- Select the **Summary View** tab.

My Cisco Entitlements

Search by All

Dashboard **Services & Subscriptions** Licenses Devices History

Home / Services & Subscriptions

Services & Subscriptions

Smart Account Virtual Account 3 Accounts

Search All 25,000 Results

Filters

Inventory View

Assigned (12,000) **a**

Unassigned (8,000)

Inventory View Assigned **b**

Product View **Summary View**

Edit Columns Import Export Actions

- The **Assignment Status** column indicates the percentage of the contract's lines that have been assigned to a VA.
- You can only migrate a contract if it has been 100% assigned to your VAs.

Home / Services and Subscriptions

Services & Subscriptions

Search All 11 Results

Filters

Inventory View

Assigned (11)

Unassigned (17)

Type

Services (9)

Subscriptions (2)

Status

CONTRACT NUMBER / SUBSCRIPTION ID

CUSTOMER NAME /

ADMIN/RESELLER NAME / (ADMIN/RESELLER SITE ID)

ASSIGNMENT STATUS

USER ADMINISTRATION

100% 1/1 lines

100% 4/4 lines

Traditional Access

Smart Access

Contracts that have been 100% assigned to a VA are available for migration



Step 3: Migrate User Access

The **User Administration** column indicates how user access to the contract is currently managed.

- ❑ **Traditional Access** indicates that the contract is not yet migrated.
- ❑ **Smart Access** indicates that the contract has already been migrated.

The screenshot shows the Cisco Services & Subscriptions interface. The main table displays contract information with columns for Contract Number / Subscription ID, Customer Name, Admin/Reseller Name, Assignment Status, and User Administration. The User Administration column is highlighted with a red box, and a callout box indicates that this column indicates whether the contract has been migrated. The table shows two rows: one with 100% assignment status and 1/1 lines (Traditional Access) and another with 100% assignment status and 4/4 lines (Smart Access).

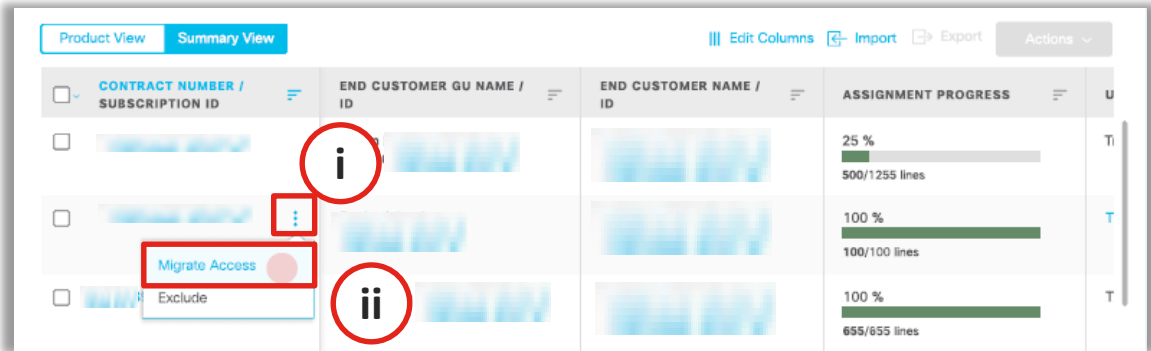
CONTRACT NUMBER / SUBSCRIPTION ID	CUSTOMER NAME /	ADMIN/RESELLER NAME / (ADMIN/RESELLER SITE ID)	ASSIGNMENT STATUS	USER ADMINISTRATION
[blurred]	[blurred]	[blurred]	100% 1/1 lines	Traditional Access
[blurred]	[blurred]	[blurred]	100% 4/4 lines	Smart Access

Contracts/subscriptions can be migrated individually or in bulk.

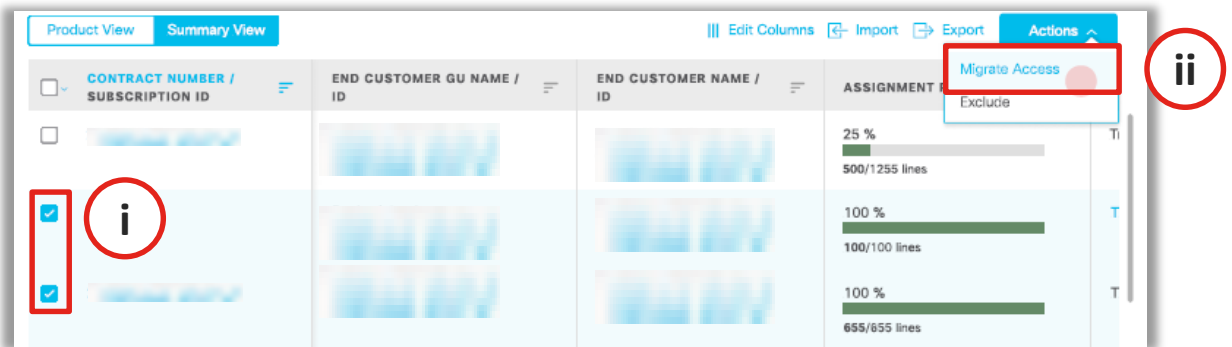


Step 3: Migrate User Access

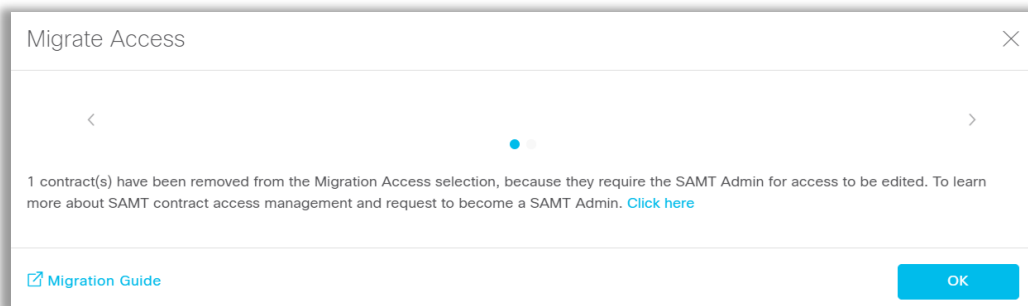
- c. To migrate individually,
 - i. Hover over to the contract/subscription and
 - ii. Click **Migrate Access** from the in-line action menu.



- d. To migrate in bulk,
 - i. Select the contracts/subscriptions and
 - ii. Select **Migrate Access** from the **Actions** drop-down.



If you selected contracts for which you are not the contract administrator, you will see the following message:





Step 3: Migrate User Access

Clicking Migrate Access in either step c or d displays the Migrate Access pop-up.

- ❑ If this is the first contract migration for your SA, you will first migrate your existing SA and VA users, to complete step 3.1.
 - ❑ If this is for subsequent contracts and your existing users have already been migrated, you will skip ahead to complete step 3.2.
- e. Select the role
- f. Click **Migrate Smart Users** to complete step 3.1.

Migrate Access

1 ————— 2
Smart Access Migration Contract/Subscription Access Migration

This migration of existing Smart Account users is a one-time operation that will update the current role of the existing Smart Account users with a new role chosen below.

Before migrating Service Access to your Smart Account, you must decide what your existing Licensing Users with roles Smart Account User and Virtual Account User will have access to going forward. Currently you have 6 existing users located in the Microsoft Smart Account that have a current role of either Smart Account User or Virtual Account User. These existing roles will be migrated to the role chosen below. Any further changes to the user role can be made in SA Admin after the completion of Access Migration.

Choose e Role for existing Smart or Virtual Account Users:

License Users (Licensing only)
Current Access

Full Users (Services + Licensing)
Service access includes RMA

Migration Guide

Cancel f Migrate Smart Users

After the step 3.1 is complete, you will proceed to step 3.2.



Step 3: Migrate User Access

To complete step 3.2:

- g. Select the role
- h. Review the lists of users on the selected contracts
- i. If you see any users that you do **not** want to have access to your SA, you can remove them from the migration.

The screenshot shows the 'Migrate Access' interface. A progress bar at the top indicates that 'Smart Access Migration' is complete (marked with a checkmark) and 'Contract/Subscription Access Migration' is in progress (marked with a '2'). A blue callout bubble on the left states: 'Indicates step 1 of migration is complete'. Below the progress bar, a warning message states: 'This migration of existing service contract users is a one-time operation for each of the below contracts, that for these contracts will migrate or expand their current access. This will be done by granting the chosen users a new role to the Smart/Virtual accounts.' Below this, it says 'You have chosen to migrate access for 1 contract or subscription' with a 'Show Less' link. A list of roles is shown: 'VA Service User (Current)' (selected with a red circle 'g'), 'VA Full User', and 'Services Access'. Below the roles, it says 'Expand to view user(s)' with a red circle 'h'. A list of users is shown with a red circle 'i' pointing to a trash icon next to a user named 'Ande'. A blue callout bubble on the right states: 'From the existing user list for the contract, select users who should continue with their access to the contract. For those not selected, access will not be migrated. During the 30 day grace period, their contract access will be retained in SAMT.' A 'Migration Guide' link is visible at the bottom left of the interface.



Step 3: Migrate User Access

j. Click **Migrate Contracts** to complete step 3.2.

Migrate Access

This migration of existing service contract users is a one-time operation for each of the below contracts, that for these contracts will migrate or expand their current access. This will be done by granting the chosen users a new role to the Smart/Virtual accounts.

You have chosen to migrate access for 2 contracts or subscriptions [Show Less](#)

- Any further changes to the user role can be made in SA Admin after the completion of Access Migration
- Remove the users that needs to be excluded from the Migration Process.
- This action will migrate all service users and roles to Smart Account [redacted] and the displayed Virtual Account(s).

Choose a role to apply to existing Smart or Virtual Account user(s) [Show Less](#)

VA Service User (Current)
Services Access

VA Full User
Services + Licenses Access

Expand to view user(s) list

+ CONTRACT: [redacted]	VIRTUAL ACCOUNT: CollaborationEA + 1 more
+ CONTRACT: [redacted]	VIRTUAL ACCOUNT: CollaborationEA

[Migration Guide](#) [Cancel](#) **Migrate Contracts**

After clicking **Migrate Contracts**, the users will be migrated offline. You will receive an email notification when the migration of contract users is complete.

Migrate Access

You have requested access migration for 1 contract or subscription. This may take up to an hour to process. You will be sent an email confirmation upon successful migration completion. The migration can be tracked in the history tab with the transaction ID [redacted]



Step 3: Migrate User Access

Grace Period



In order to prevent any interruption in delivery of service for your existing users, and to allow time for you to further refine your migrated SA/VA user access, your migrated contracts will still be temporarily administrable through the Service Access Management Tool (SAMT) for 30 days.

During the grace period, you can:

- Remove support access from a user (for example, a user that you excluded from the migration, and that you do not want to be able to obtain support during the grace period).
- Grant support access to a user that may be experiencing difficulty with the SA/VA role-based access to services.

However, any changes made in SAMT during the grace period will **not** be reflected in your SA.

After the grace period expires:

- The contract will become “read-only” in SAMT.
- User access will be exclusively governed by the users’ roles to the SA/VA.
- Individual user-contract access will be inactivated.

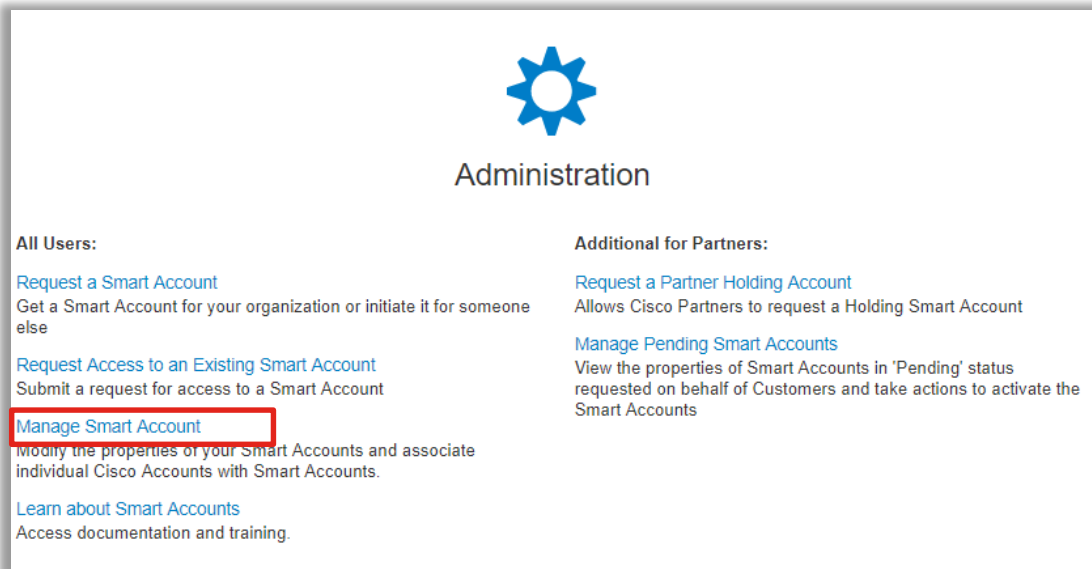


Step 3: Migrate User Access

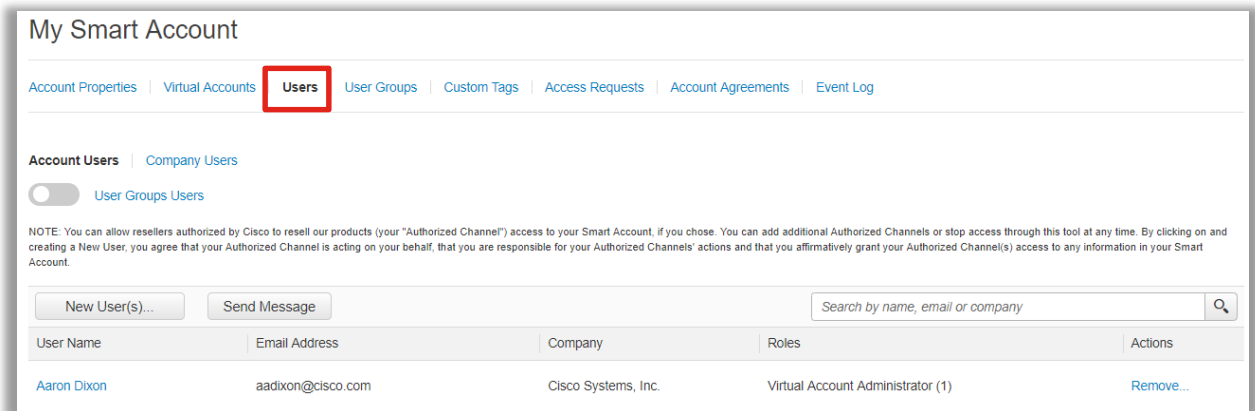
Review User Access Assignments



After you receive the email confirmation that step 3.2 completed, review the role assignments through the **Manage Smart Account** link on software.cisco.com and make changes, as needed.



The screenshot shows the 'Administration' page with a gear icon at the top. Under 'All Users:', there are links for 'Request a Smart Account', 'Request Access to an Existing Smart Account', 'Manage Smart Account' (highlighted with a red box), and 'Learn about Smart Accounts'. Under 'Additional for Partners:', there are links for 'Request a Partner Holding Account' and 'Manage Pending Smart Accounts'.



The screenshot shows the 'My Smart Account' page with a navigation bar including 'Account Properties', 'Virtual Accounts', 'Users' (highlighted with a red box), 'User Groups', 'Custom Tags', 'Access Requests', 'Account Agreements', and 'Event Log'. Below the navigation bar, there are sections for 'Account Users' and 'Company Users', and a 'User Groups Users' toggle. A note explains that users can allow resellers access to their Smart Account. At the bottom, there is a table of users with columns for 'User Name', 'Email Address', 'Company', 'Roles', and 'Actions'.

User Name	Email Address	Company	Roles	Actions
Aaron Dixon	aadixon@cisco.com	Cisco Systems, Inc.	Virtual Account Administrator (1)	Remove...



To learn more, visit www.cisco.com/go/mce and for questions, write to MyCiscoEntitlements@cisco.com