



# Get Smart with Cisco Smart Accounts

March, 2022

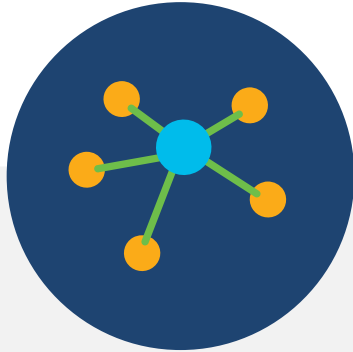


# AGENDA

- About Cisco Smart Accounts and Smart Licensing
- Demonstration
  - Create Virtual Accounts
  - Add Users
  - Create Custom Tags
  - Requests, Notifications & Event Log Tabs
  - License Management
- Q&A
- Resources

# Software Management is Complex Industry Wide

*“Software Asset Management is becoming more challenging every year.”*



Licenses are  
complex

Causing compliance issues  
and low utilization



Software management  
requires specialized  
knowledge

Making it hard to optimize  
software spending



Manual approach is  
error prone, expensive  
and doesn't scale

Creating risk and  
increasing cost

# Cisco Software Framework

## Simplicity – Flexibility – Value

### Software Portfolio



Collaboration



Security



IoT



Mobility  
& Video



Network Compute and Cloud

### Deployment Models

Cloud/Hybrid



On-Premises

Partner/SP Hosted  
& Managed

### Purchase Licensing Programs



Transactional  
Perpetual | Subscription



Flexible  
Utility | Capacity |  
Advantage Licensing  
Program



Enterprise &  
Service Provider  
License Agreements

# Smart Accounts



Cisco Smart Account

A **Cisco Customer Smart Account** is a customer managed data repository providing full visibility and access control to Cisco software licenses, entitlements, and product instances across the company.

Smart Accounts are Foundational to Smart Licensing

# Customer Benefits



**Greater visibility** of Cisco software licenses, entitlements and users across the organization.



**Centralized management** of software licenses and entitlements to improve asset utilization.



**Drive down costs** and improve ROI by making better informed purchase and renewal decisions.



**Organize and manage** by business unit, geo or other company designation, and delegate admin duties.

Easy | Fast | Free

# Data you get from your Smart Account

## License Information

Assets you currently own



## Order Information

Asset acquisition details, applicable regions



## Consumption Information

Reports on devices that are currently leveraging assets



# Cisco Software Licensing

## Traditional Licensing (PAK)



Physical / Electronic delivery  
Causes confusion



PAK Registration  
Manually register each device



Device Specific  
Licenses are limited to only one device



Locked  
Licenses were node locked



Limited View  
Difficult to know what you own



## Smart Licensing (SL)



Digital Fulfillment  
Automatic license provisioning



Easy Registration  
No PAKs, easy activation and ready to use



Company-Specific  
Flexible licensing to use across devices



Unlocked  
Add users and licenses as needed



Complete View  
Software, services, and devices



# Types of Cisco Software Licenses and Tools

Smart Accounts are used to establish your account, and to set up virtual accounts, users, groups and access levels

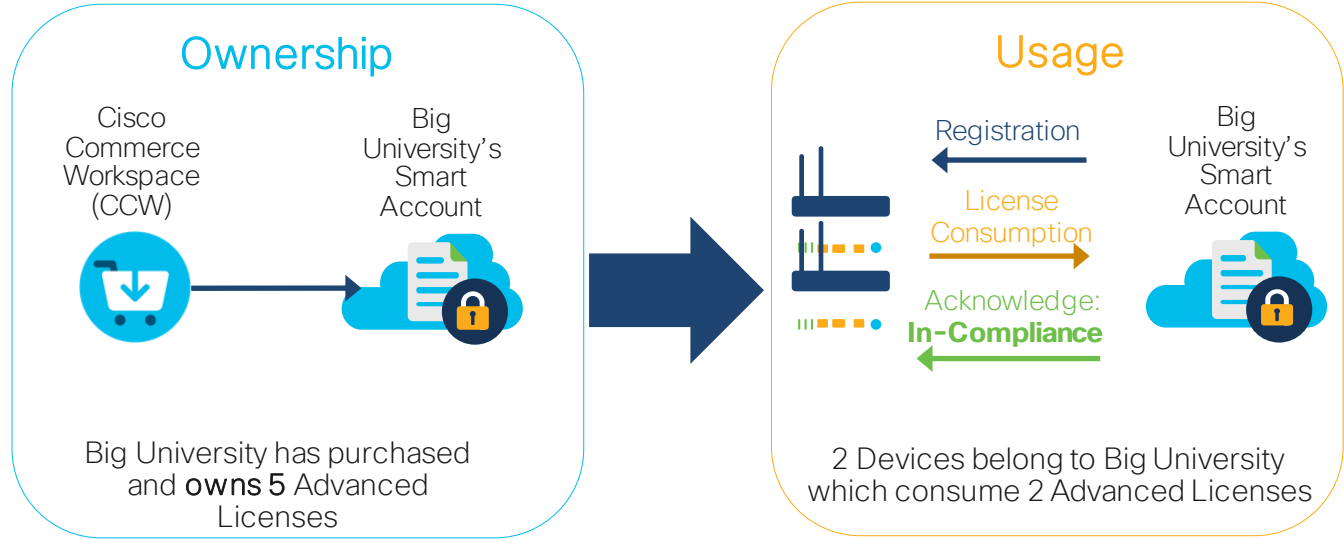
TYPE OF LICENSE	PAK Licenses	Smart, SLP and/or Hybrid Licenses	RTU Licenses
USE THIS TOOL	License Registration Portal	CSSM / My Cisco Entitlements	Customer System
TO DO THIS	<ul style="list-style-type: none"><li>• Generate license</li><li>• Port licenses</li><li>• Convert PAK to smart</li><li>• Reassign to different virtual accounts/user/device/access</li></ul>	<ul style="list-style-type: none"><li>• Generate token</li><li>• Covert hybrid to smart</li><li>• Reassign to different virtual accounts/users/device/access</li><li>• Portability and node lock</li></ul>	<ul style="list-style-type: none"><li>• Locally managed, honor-based software license on customer system</li></ul>

Activate Smart Account or CSSM by following our [Quick Start Guide](#)

# Smart Licensing and Smart Accounts

## Example Scenario

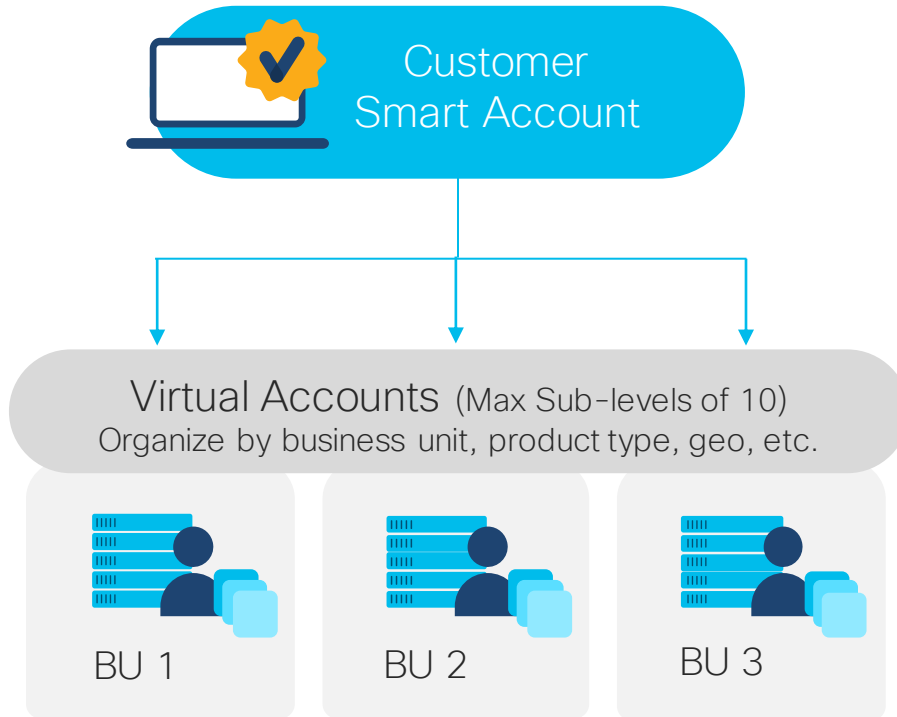
1. The Customer is Big University
2. Big U has set up their Smart Account
3. In CCW they purchased 5 Advanced Licenses
4. Licenses are deposited into their Smart Account
5. Big U is currently using 2 licenses on their devices
6. 3 Licenses are still available to be used
7. They are in compliance



Big University owns 5 licenses.....	+5
2 licenses are being consumed.....	(-2)
Licenses available to be used.....	+3
<b>Big University is in Software Compliance</b>	

# Setting up your Smart Account

## Users, Virtual Accounts, other settings



Organize software licenses using Virtual Accounts

Virtual Accounts can be set-up by business unit, product, geography or any other destination – you decide what works best for your organization

**The result:** Better utilization and more efficient planning

# Smart and Virtual Account User Roles



## Smart Account Administrator

Smart Account Administrators can edit Smart Account properties, add and edit users and Virtual Accounts, view event logs, and manage licenses for the entire Smart Account.



## Smart Account Approver

Smart Account Approvers can edit Smart Account properties, view all users and view event logs. Approvers cannot manage licenses. Note: *This role is used less and less, as Admin and User roles are more preferred.*



## Smart Account User

Smart Account Users can access all Virtual Accounts and perform licensing activities but cannot create new Virtual Accounts or manage users.



## Virtual Account Administrator

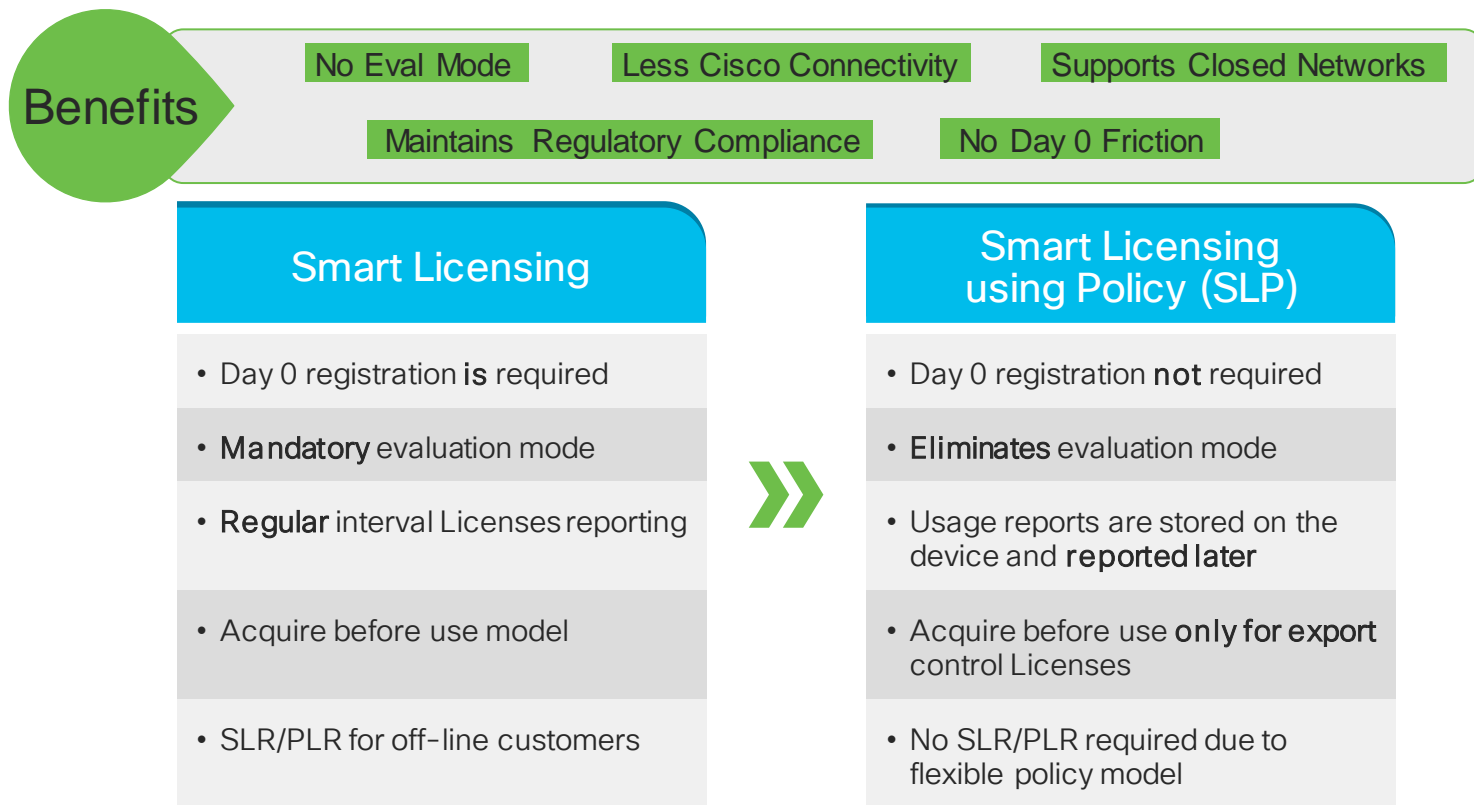
Virtual Account Administrators can add and edit users to assigned Virtual Accounts, view event logs for assigned Virtual Accounts, view account agreements, and manage licenses for the assigned Virtual Accounts.



## Virtual Account User

Virtual Account Users can manage licensing for Virtual Accounts they are assigned to, but they cannot add new users.

# Smart Licensing / Smart Licensing using Policy (SLP)



*The Smart Licensing using Policy is an evolved version of Smart Licensing  
Starting with IOS-XE 17.3.2 and 17.4.1 all products running these versions or higher will support Smart Licensing using Policy*

# Summary of license conversion processes

## PAK Conversion

Conversion Modes	Prerequisites	Summarized Steps
Through LRP	<ul style="list-style-type: none"> <li>• Device has convertible licenses present on it</li> <li>• Device is tagged to the SA, VA</li> </ul>	<ol style="list-style-type: none"> <li>1. Log on to the LRP portal using the link: <a href="https://software.cisco.com/software/swift/lrp/">https://software.cisco.com/software/swift/lrp/</a></li> <li>2. Select the correct VA where the PAK is located</li> <li>3. Select the PAK which needs to be converted to smart entitlement.</li> <li>4. From the PAK context option, select “Convert to Smart Licensing”</li> <li>5. Select SKUs under PAK and quantity of Licenses to be converted and Submit</li> <li>6. Licenses are converted to smart entitlements; Success message is shown.</li> <li>7. Entitlements available on CSSM under selected Smart and Virtual Account.</li> </ol>
Through CSSM	<ul style="list-style-type: none"> <li>• PAK should not be fulfilled</li> <li>• PAK should be tagged to the SA, VA</li> <li>• PAK should have convertible licenses entitlement</li> <li>• CSSM convert to Smart licensing tab should have synced with the latest PAK info</li> </ul>	<ol style="list-style-type: none"> <li>1. Log on to the CSSM portal and select the following tabs: <b>software.cisco.com</b> &gt; Manage licenses &gt; Convert to Smart license tab</li> <li>2. Go to Convert PAKs tab</li> <li>3. Assigned PAKs will show up on the CSSM portal. Click Convert to Smart License</li> <li>4. Select SKUs under PAK and quantity of Licenses to be converted</li> <li>5. Review and confirm.</li> <li>6. Once converted to Smart Entitlement, the old classic licenses</li> </ol>

# Summary of license conversion processes

## Device Conversion

Conversion Modes	Prerequisites	Summarized Steps
Through LRP	<ul style="list-style-type: none"> <li>• PAK should not be fulfilled</li> <li>• PAK should be tagged to the SA, VA</li> <li>• PAK should have convertible licenses entitlement</li> </ul>	<ol style="list-style-type: none"> <li>1. Log on to the LRP portal using the link: <a href="https://software.cisco.com/software/swift/lrp/">https://software.cisco.com/software/swift/lrp/</a></li> <li>2. Select the correct VA where the device is located</li> <li>3. Go to Device tab. Locate the device to be migrated (please filter using PLM UUID/UDI SN/MAC address/Host ID etc.)</li> <li>4. Select the device where the classical licenses need to be converted to Smart entitlements.</li> <li>5. From the context option select "Convert licenses to Smart Licensing" option.</li> <li>6. Select SKU and quantity of Licenses to be converted</li> <li>7. Review, Confirm and click Submit</li> <li>8. Once the licenses are fully converted, the device will be removed from LRP</li> <li>9. Confirmation message will be shown once the licenses are converted.</li> <li>10. The entitlements will now be available on CSSM under selected Smart and Virtual Account.</li> </ol>
Through CSSM	<ul style="list-style-type: none"> <li>• Device has convertible licenses present on it</li> <li>• Device is tagged to the SA, VA</li> <li>• CSSM convert to Smart licensing tab should have synced with the latest device info</li> </ul>	<ol style="list-style-type: none"> <li>1. Log on to the CSSM portal and select the following tabs: software.cisco.com &gt; Manage licenses &gt; Convert to Smart license tab</li> <li>2. Go to Convert Licenses tab</li> <li>3. Assigned Device will show up on the CSSM Portal. The CSSM portal will be refreshed every 1</li> <li>4. hour. If the assigned device is not visible in CSSM, please recheck after an hour.</li> <li>5. Go to Convert Licenses tab and click Use License Conversion wizard or select the device from the list.</li> <li>6. Click Convert to Smart License</li> <li>7. Select SKU and quantity of Licenses to be converted</li> <li>8. Review, Confirm and click Submit</li> </ol>

# Summary of license conversion processes

## DLC Conversion





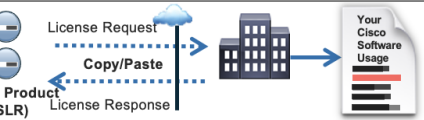
Conversion Modes	Prerequisites	Summarized Steps
Through DLC (Device Led Conversion)	<ul style="list-style-type: none"><li>• Device has convertible licenses present on it</li><li>• Device should support DLC process (refer <a href="#">Cisco's licensing roadmap</a> to check this)</li><li>• Device Led Conversion to Smart Licensing should be enabled in CSSM (Log in to CSSM from <a href="https://software.cisco.com/#">https://software.cisco.com/#</a><ul style="list-style-type: none"><li>&gt; Click the Convert to Smart Licensing tab.</li><li>&gt; Click the Conversion Settings tab and check this option)</li></ul></li><li>• Device is updated to the correct IOS version (Check product related documentation for details)</li><li>• You have registered your device in CSSM.</li><li>• You have configured the Layer 3 connectivity to the CSSM On-prem. (Only in case of On-prem)</li></ul>	<ol style="list-style-type: none"><li>1. Register device to Smart account</li><li>2. Execute <b>License smart conversion start</b> command on CLI to directly deposit existing Perpetual licenses into Smart Account.</li><li>3. Device will send the migration data to the CSSM. The CSSM will then take time to convert the licenses and deposit them into your account.</li><li>4. Following Start of DLC process, devices establishes communication with CSSM and process</li><li>5. cannot be interrupted. However, in case communication breakdown and to cancel current attempt use <b>"license smart conversion stop"</b></li><li>6. Going back to 'Inventory' -&gt; 'Licenses' on CSSM , you should see the count for your perpetual type license automatically increment by 1 for each device that you converted</li></ol>



# Smart License Deployment Methods

Ease of use ↑  
Security Policy ↓

## Options

- 1 Direct cloud access**  
Cisco product sends usage information directly over the internet, no additional components needed.  

- 2 Direct cloud access through an HTTPs proxy**  
Cisco Products send usage information over the internet via a Proxy Server – Smart Call Home Transport Gateway (Free VM Download) or off-the-shelf Proxy (such as Apache).  

- 3 Mediated access through an on-premises collector – connected**  
Cisco Products send usage information to a local connected collector, which acts as a local license authority. Periodically, an exchange of information will be performed to keep the databases in sync.  

- 4 Mediated access through an on-premises collector – disconnected**  
Cisco Products send usage information to a local disconnected collector, which acts as a local license authority. Once a month, an exchange of synchronization information will be performed to keep the databases in sync.  

- 5 License Reservation: (PLR / SLR)**  
Designed for highly secure intelligence and military environments where communications with outside is difficult. Products will operate normally without ongoing communication to CSSM.  


# Smart Account Best Practices

- ✓ Create Virtual Accounts to organize and assign your licenses and devices.
- ✓ Avoid creating multiple Smart Accounts for your Company as you can't transfer licenses and devices between them.
- ✓ If no Customer Smart Account, then assign the end customer email to a deal or quote and create a Customer Smart Account.
- ✓ While ordering, always select the Customer Smart Account or default Partner Holding Account and assign to a specific Virtual Account.
- ✓ Assign the end customer Smart Account to deal or quote so that licenses get provisioned.



*Licenses can only be consumed in a Customer Smart Account*

# My Cisco Entitlements



Complete Visibility  
Real Time  
One Platform

<http://www.cisco.com/go/mce>



**VIEW**

See cross-portfolio  
licenses, devices  
and metrics live



**MANAGE**

Plan, track, and  
control usages to  
maximize ROI



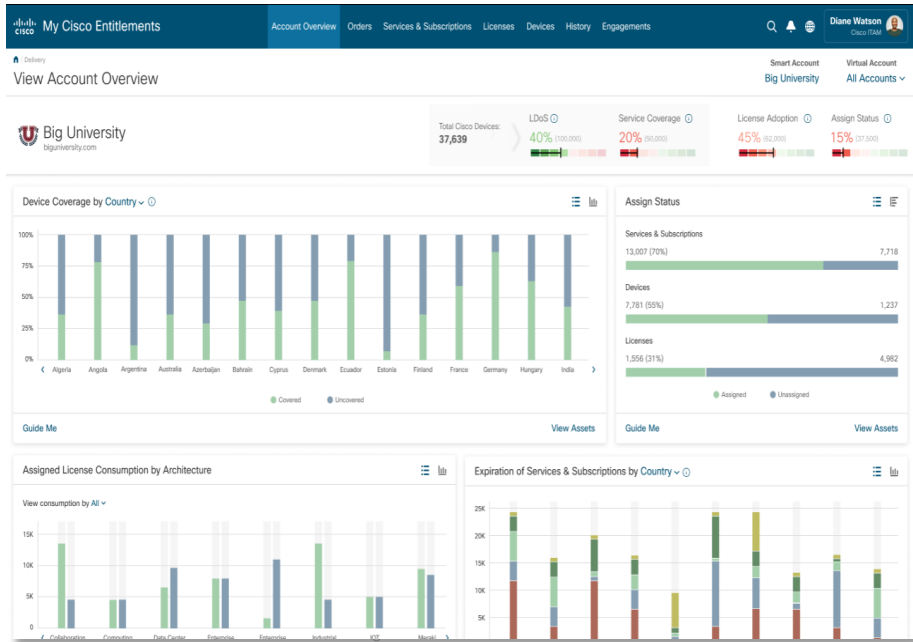
**SECURE**

Manage user roles  
and access  
to protect your  
investments

# My Cisco Entitlements (MCE)



## Account Overview



## Learn *how* to work in MCE

Learn how to [navigate](#) MCE by watching a video

Understand MCE [user roles](#)

You can learn how to [edit](#) Virtual Account assignments

See [how](#) to open a support case

## Examples of what you can *do*

[Order](#) software upgrades from the 'Licenses' tab

[Assign](#) Virtual Accounts from 'Services and Subscriptions'

Perform eDelivery/Orders functions such as: [access orders](#), [manage orders](#), [send OBA](#), and [download digital assets](#) from the 'Orders' tab



# DEMO

- Create Virtual Accounts
- Add Users
- Create Custom Tags
- Requests, Notifications & Event Log Tabs
- License Management

# Smart Account and Licensing Support Contacts



Hardware  
Support

<https://www.cisco.com/c/en/us/support/web/tsd-cisco-worldwide-contacts.html>



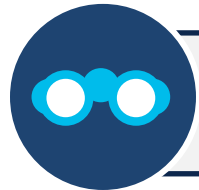
Licensing  
Support

Open a support case via Support Case Manager (SCM)  
<https://www.cisco.com/go/scm>. Click [here](#) to learn more!



Smart Licensing  
Training &  
Documents

Access [live training here](#)  
Access a [comprehensive list of training documents here](#)  
Access [Get Smart with Smart Training](#)  
Access [Smart Licensing and Accounts FAQ](#)



My Cisco  
Entitlements

See your licenses, devices and metrics in one place  
<http://www.cisco.com/go/mce>

