Welcome, we will begin shortly

Smart Account & Smart Licensing

Speakers – Jamie Katayama, Senthil Arumugam
Partner Enablement Operations

July 6, 2022

Housekeeping Rules

This session will last approximately one hour.

All lines are muted.

Q&A Panel – address to all panelists.

Session will be recorded.

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PIW – Smart Account & Smart Licensing

Today's host:

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July 6, 2022

Smart Account & Smart Licensing

Today's speakers:

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Partner Operations Enablement Lead
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Agenda

Smart Account Basics & Management

1. What is Smart Account?
2. How to manage Smart Accounts
   - Property
   - Virtual Accounts
   - Users

License Management

- Alerts
- Reports
- Preferences
- On-Prem accounts
- Move licenses between SAs & Virtual Accounts
- Smart Licensing vs traditional licensing
- Convert traditional licenses into Smart Licenses

Smart Licensing Deployment Methods

Smart Licensing when direct access to the Cisco cloud is not allowed.

- Smart Software Manager On-prem “Satellite”
- Specific License Reservation (SLR) and Permanent LR (PLR)
- **Smart Licensing Using Policy**

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Smart Account Basics & Management	1. What is Smart Account? 2. How to manage Smart Accounts • Property • Virtual Accounts • Users
License Management	• Alerts • Reports • Preferences • On-Prem accounts • Move licenses between SAs & Virtual Accounts • Smart Licensing vs traditional licensing • Convert traditional licenses into Smart Licenses
Smart Licensing Deployment Methods	Smart Licensing when direct access to the Cisco cloud is not allowed. • Smart Software Manager On-prem “Satellite” • Specific License Reservation (SLR) and Permanent LR (PLR) • **Smart Licensing Using Policy**

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Smart Account Basics and Management

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1. Smart Account Overview
   - What is Smart Account?
   - Smart Account types: Customer Account vs Holding Account

2. Managing Smart Accounts
   - Virtual account structure
   - Collected data: License, order, and usage

3. Benefits of Smart Account

4. How to get a new Smart Account
   - Smart Account in ordering

5. Private/Public settings in Smart Account

Accessing Smart Licenses starts with a Smart Account

Smart Accounts are Foundational to Smart Licensing

Smart Accounts Enable Easy Access & Control

- Central, transparent & secure
- Real-time visibility
- Easy & secure delivery

- Low-touch keyless license
- Customer defined controls

- User access control
- Licenses belong to a single account, not individual users
- Flexible license allocation through pooling

- Proactive coverage with automated notifications of additions & expirations
- Full visibility & insights to inform purchasing & renewal decisions

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Smart Account Types

Customer Smart Account

- Where licenses are deposited and managed
- Can be managed by customer directly, designated VAR or authorized party through CSSM or LRP

Partner Holding Account

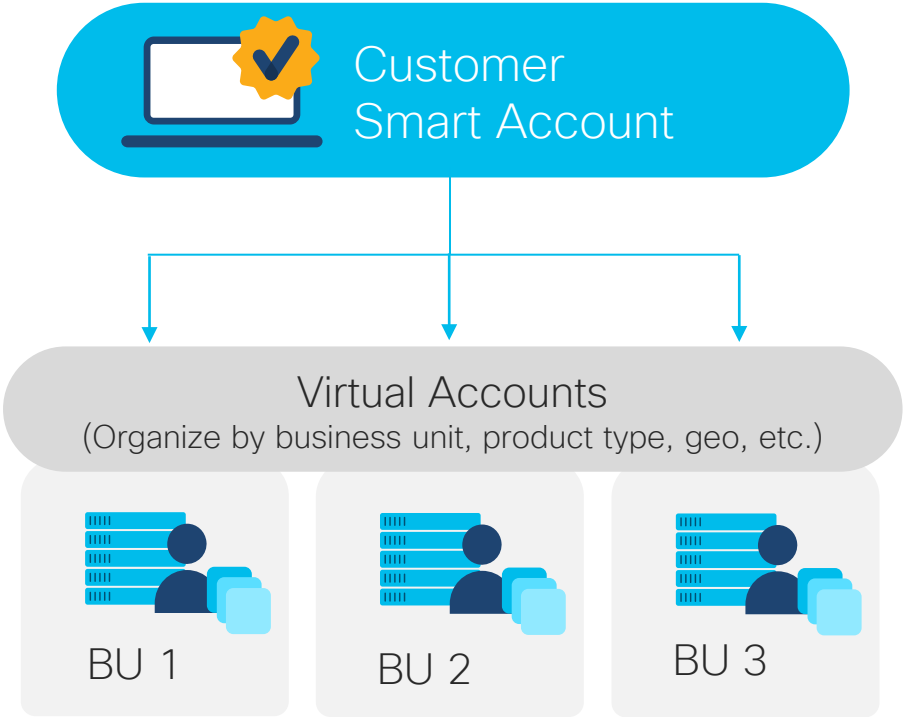
- Partner or reseller store smart enabled products temporarily, before depositing them into an end customer Smart Account.
- **Note:** It is recommended that partners deposit licenses directly into the Customer Smart Account because licenses can only be consumed in the Customer Smart Account

Virtual Accounts

(Organize by business unit, product type, geo, etc.)

Virtual Accounts

Create Asset Pools with your Smart Accounts using Virtual Accounts



Organize your licenses the way you want with Virtual Accounts

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

The result: Better utilization and more efficient planning.

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What Data Can You Get from your Smart Account?

License Information

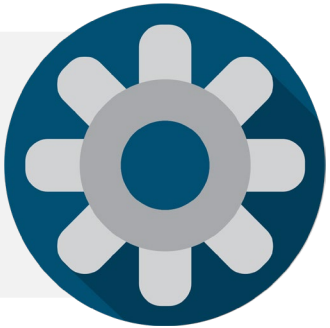
Assets you currently own, etc.

Order Information

Asset acquisition details, applicable regions, etc.

Usage Information

Devices that are currently leveraging assets & remaining assets.



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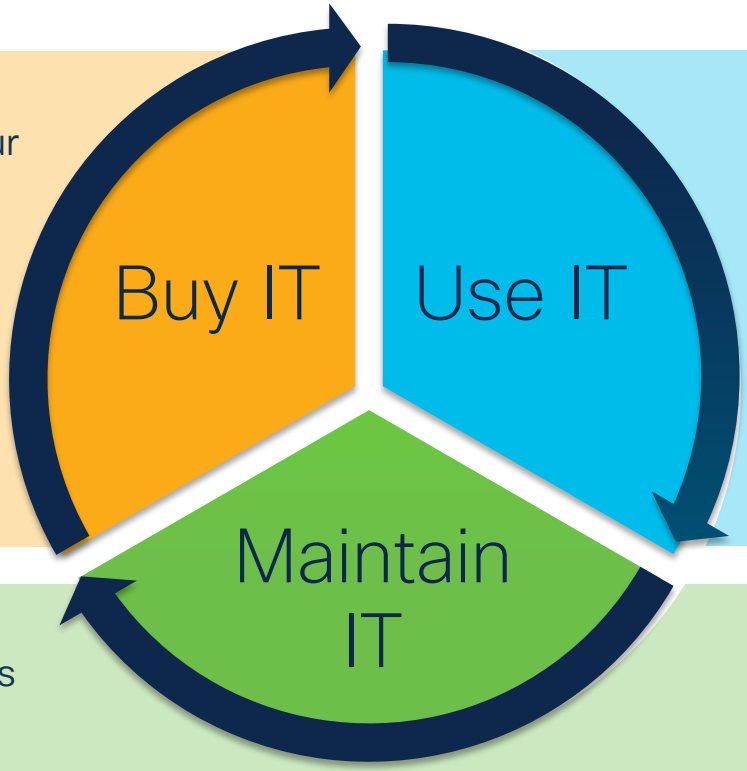
Smart Accounts help throughout the IT Lifecycle

All your new purchases and subscriptions, delivered to your Company's Digital Wallet

Automated Notifications of Additions, Renewals, and Expirations

See 'What do I Own?' all in one place



Provide ability to deploy Cisco Products to anybody who needs it

See 'What am I Using?' all in one place

Always have the Access you need to know which purchases you may need next

Always have the Access you need to maintain your inventory

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Benefits to Customers

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

Benefits to Partners

Be the hero with Cisco Smart Accounts.

- Simple activation & management make **Cisco Software easier to sell.**
- With customer consent, you can **manage Smart Accounts on your customer's behalf** and visibility enables **upsell opportunities.**
- **Monetize value added services** for managing customer licenses and devices through Smart Accounts.
- Provides a mechanism to **improve customer relationships.**

Build customer loyalty & differentiate from other Partners

How to get a Smart Account

Request a Smart Account

1. Go to Cisco Software Central – software.cisco.com
2. Select “Request a Smart Account for your Customer”
3. Automatic email is sent to Customer SA administrator

Request access to an existing SA

1. Go to Cisco Software Central – software.cisco.com
2. Select “request access to an existing smart account”
3. Enter Domain to notify administrators

Access smart licensing, classic PAK licensing & Enterprise Agreement licensing through the normal licensing portals

Smart Licensing Ordering Scenarios

	Cisco Software Central (CSC)	Cisco Commerce (CCW)	Smart Software Manager (SSM)
Scenario 1: Simple Resale	Create Holding Smart Account	Assign Order to Customer Smart Account	Customer manages Licenses With no partner involvement
Scenario 2: Resale with Lifecycle Management	Create Holding Smart Account	Assign Order to Customer Smart Account	Partner assists or manages licenses on Behalf of customer
Scenario 3: Partner also Customer	Create Customer Smart Account	Assign Order to Your Customer Smart Account	Manage own licenses

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Key Takeaways

Smart Account is a ‘container’

1) It contains your Cisco Licenses, Devices, Agreements, and user & role settings.
2) To view your assets, you access the different Cisco platforms.

Two types of Smart Accounts

Customer Smart Account and Holding Smart Account.

Smart Account Best Practice

1) Organize the licenses and devices by virtual accounts.
2) Licenses and devices cannot be transferred across Smart Accounts.
3) In CCW, select Customer Smart Account and also assign a specific virtual account.

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Quiz Time

Quiz 1

Which statement about Smart Account is true?

A. *Customer Smart Account can be used to permanently store and consume licenses*

B. *Partner Holding Account can be used to consume licenses*

C. *Customer Smart Account are meant for temporary storage of licenses*

D. *All the above*

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Quiz 1 Answer

Which statement about Smart Account is true?

A. *Customer Smart Account can be used to permanently store and consume licenses*

B. *Partner Holding Account can be used to consume licenses*

C. *Customer Smart Account are meant for temporary storage of licenses*

D. *All the above*

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Quiz 2

Which statement about access is true?

A. *Partners get default access to Smart Account*

B. *Customer provides access to Partner*

C. *Both Partner and Customer get default access to Smart Account*

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Quiz 2 Answer

Which statement about access is true?

A. *Partners get default access to Smart Account*

B. *Customer provides access to Partner*

C. *Both Partner and Customer get default access to Smart Account*

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More resources about Smart Account

Quick cheat sheet
Connecting Dots – SA and SL Learning Series

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VOD: Smart Account creation
- How to create a Smart Account
- How to access to an existing Smart Account

VOD: Introduction to Virtual Account
- Virtual Account overview
- Benefits and best practice

Guide: How to manage Smart Account
- User, user groups, and roles
- Custom tags
- Account agreements and access requests

Guide: Partner-centric SA & SL FAQ
- Partner Holding Account
- Smart Account & Smart licensing for partners

VOD: How to create an order in CCW
- How to assign Smart Account to both Smart licenses and classic, which is PAK-based

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Smart Licensing Basics

1. Smart Licensing
   - Other asset types in Smart Account
   - Getting started with Smart Software Manager (SSM)

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Access and Manage Cisco Software Licenses

Smart Account

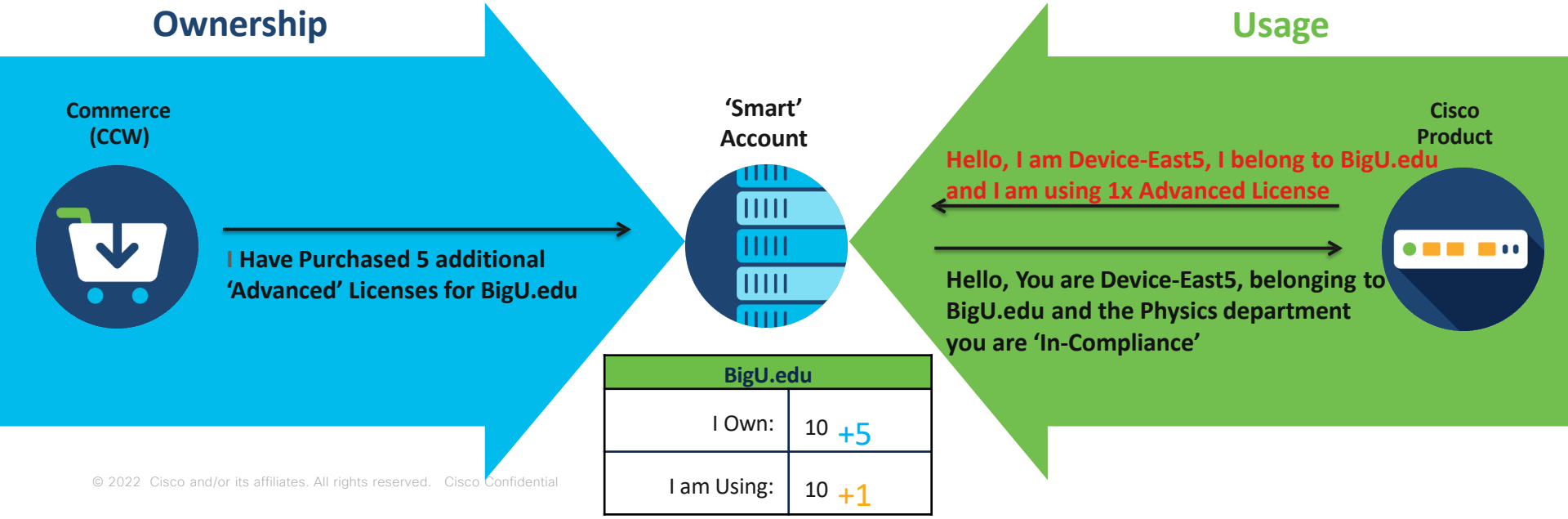
Establish Account | Set up Virtual Accounts, users, groups, access levels

	PAK Licenses	Smart &/or Hybrid Licenses	Enterprise Agreement	RTU Licenses
Type of License				
Use this tool	LRP	CSSM	EA Workspace	Customer System
To do this	• Generate license • Port licenses • Convert hybrid to smart • Reassign to different virtual accounts/user/ device/access	• Generate token • Covert hybrid to smart • Reassign to different virtual accounts/users/ device/access • Portability & node lock	• Generate token • Reassign to different virtual accounts/users/ device/access • Portability & node lock	• Locally manage software license on customer system

Smart Accounts are foundational to managing software licenses

Getting Started with SSM

- **SSM** provides a Software Inventory Management System that provides Customers, Cisco, and Selected Partners with information about Software Ownership and Software Utilization for **Smart Licenses**
- Only Smart Licenses deposited in Customer Smart Accounts are managed in SSM
  - Manage inventory from one centralized website
  - Organize and view licenses in groups called virtual accounts
  - Transfer Licenses easily between virtual accounts



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Smart Licensing Management in Smart Software Manager (SSM)

1. Smart License management
   - Basic portal navigation
   - Alerts
   - Inventory & token generation
   - License transfer
   - Product Instances

2. Licensing management
   - Reports
   - Preferences
   - On-Prem (Satellite)
   - Activity
   - Feedback & virtual support

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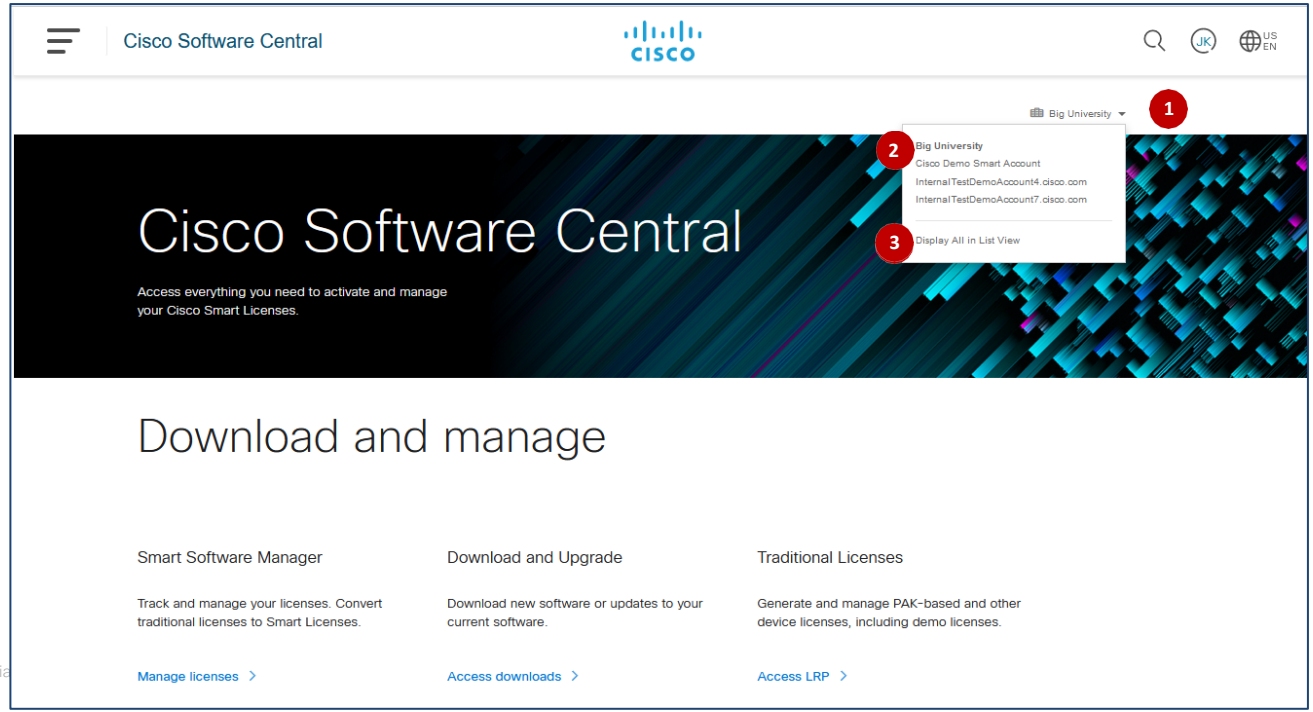
Basic Portal Navigation

View Multiple Accounts

www.software.cisco.com

1. If you have access to multiple Customer Smart Accounts, you can click on the arrow next to SA name.
2. From the drop-down, you can view your Smart Accounts on the list.
3. You can also Display All in List View, which prompts a pop-up.



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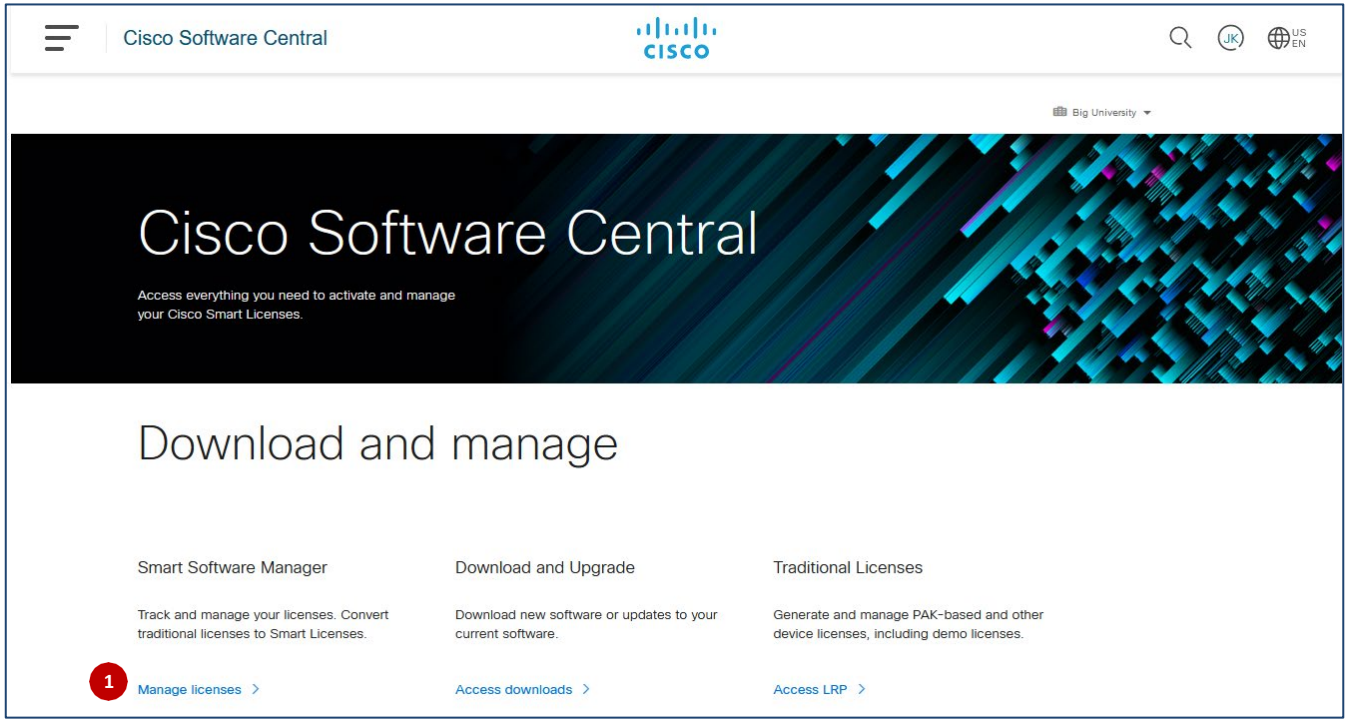
Basic Portal Navigation

Access SSM

1. From Cisco Software Central (CSC), click **Smart Software Licensing.**



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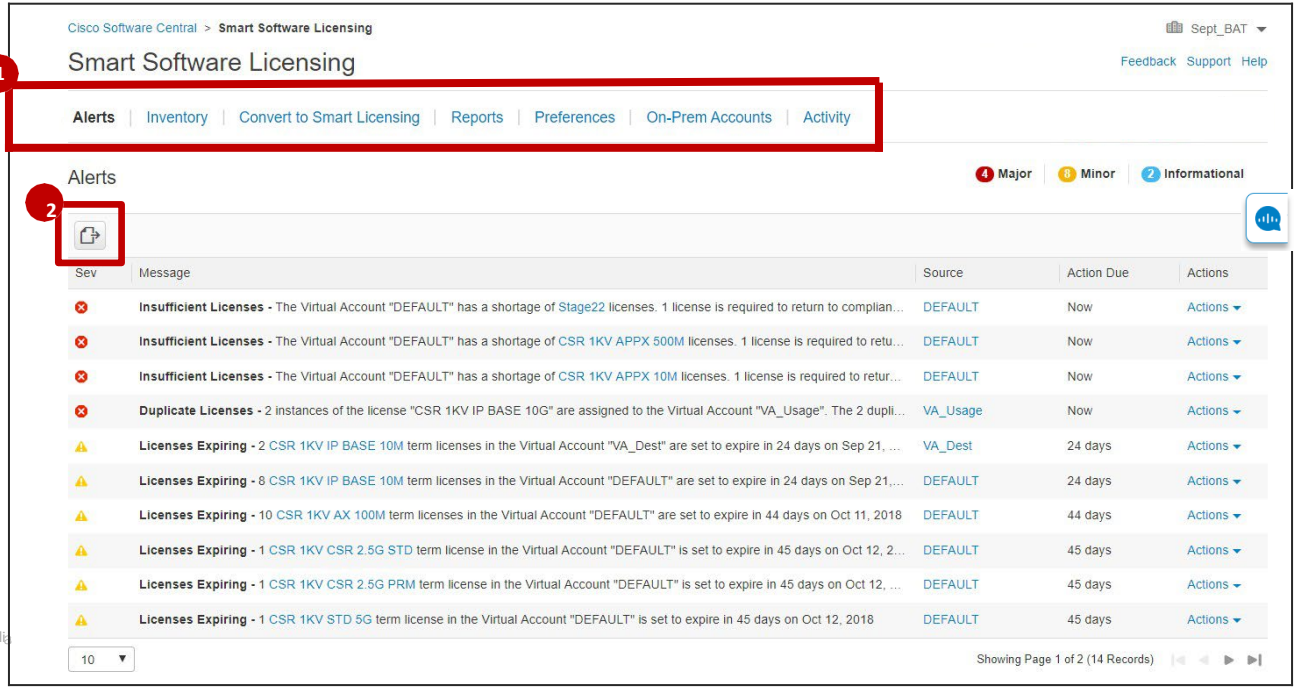
Basic Portal Navigation

Layout Navigation

1. The Smart Software Manager has 7 tabs and provides visibility to Alerts. You can view all major and minor alerts. At the Virtual Account and Smart Account Level, when license expiration alert messages are generated for licenses that are part of a subscription, the word ‘term' is added after the license type.
2. Throughout the tool, click the export icon to download the information in that tab.



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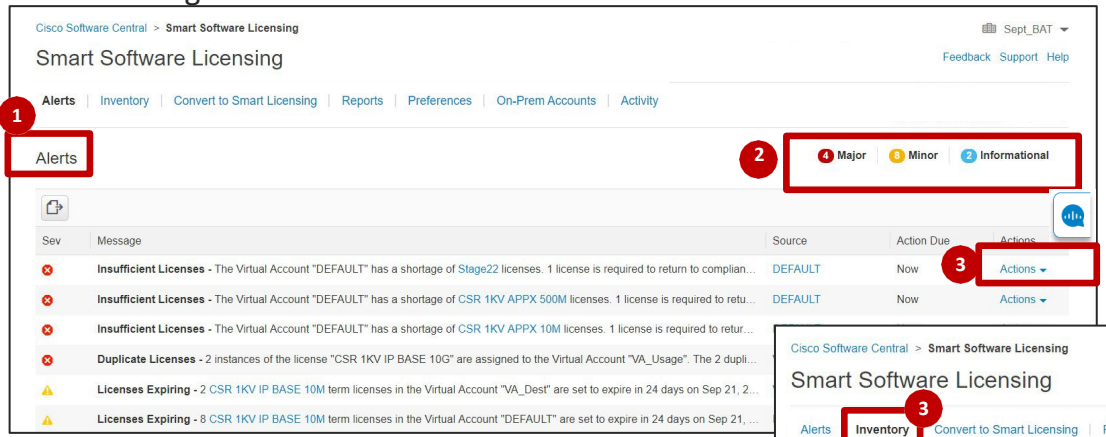
Alert

Major, Minor & Informational Minor

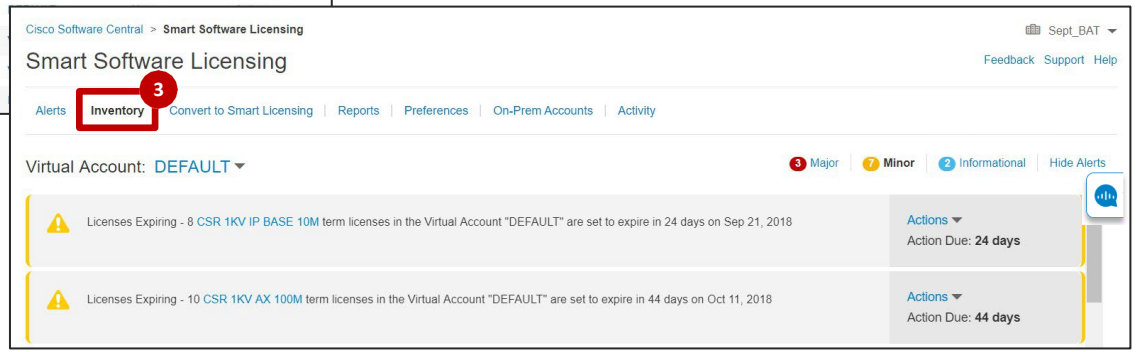
When viewing the Alerts Page, the alerts are sequenced in the following order: **Major**, **Minor** and **Informational**.

1. View alerts for the entire Smart Account in one location.
2. Major alerts are **red**, Minor alerts are in **yellow** and Informational alerts are **light blue**.
3. Click **Action** to resolve any issues or dismiss minor/informational alerts.
4. View alerts by Virtual Account in the Inventory tab. Click Header level icon to expand message.

Any license or product instance that is not in compliance with the licensing agreement creates an alert. (e.g. more licenses in use than purchased)



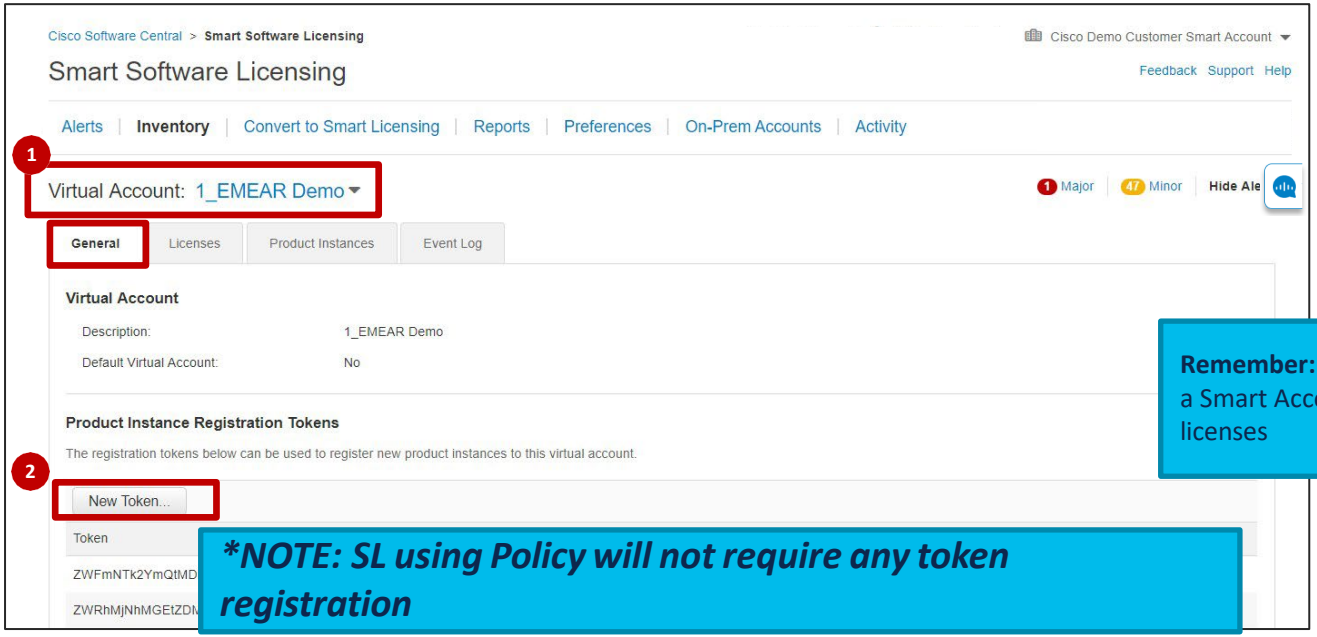
NOTE: SL using policy is only applicable for IOS-XE version 17.3.2/17.4.1 and above.



At the Virtual Account and Smart Account Level, when license expiration alert messages are generated for licenses that are part of a subscription, the word 'term' is now added after the license type.

Inventory General

1. In the Inventory – General Tab, view Virtual Account details for the selected Virtual Account.
2. You can also generate tokens to register new product instances to the Virtual Account.
   See Product Instance Section for more details.



Remember: A Virtual account is a subset of a Smart Account used to internally organize licenses

***NOTE: SL using Policy will not require any token registration**

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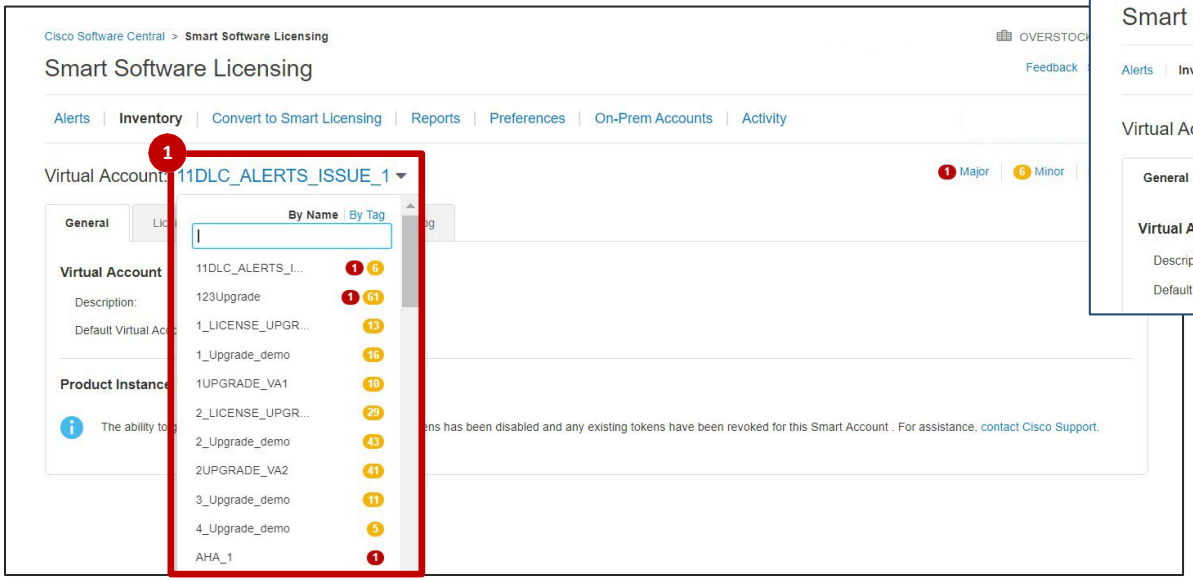
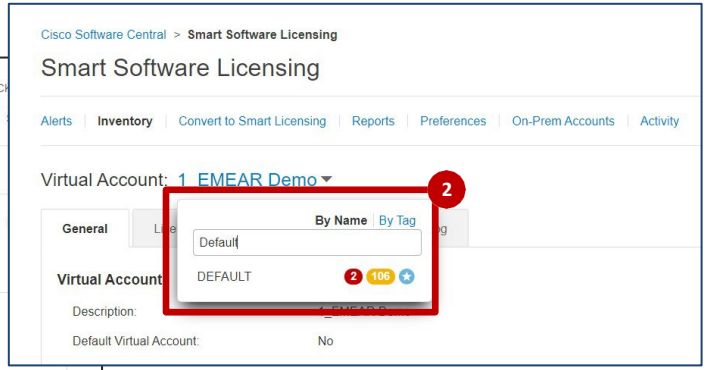
Inventory General

1. You can toggle between Virtual Accounts in the Inventory Section by clicking the arrow and selecting a different Virtual Account.
2. You can use the **Type Down** search **by Name** or **by Tag to select a Virtual Account.** This makes it easier to switch between Virtual Accounts.





Default Virtual Accounts

- Indicated with Blue Star Icon
- If items were assigned to the overall Smart Account and not a specific Virtual Account, licenses will be deposited into the default Virtual Account.
- Before setting up Virtual Accounts in CSC, all Smart Licenses will display in the default account in the Licenses tab.

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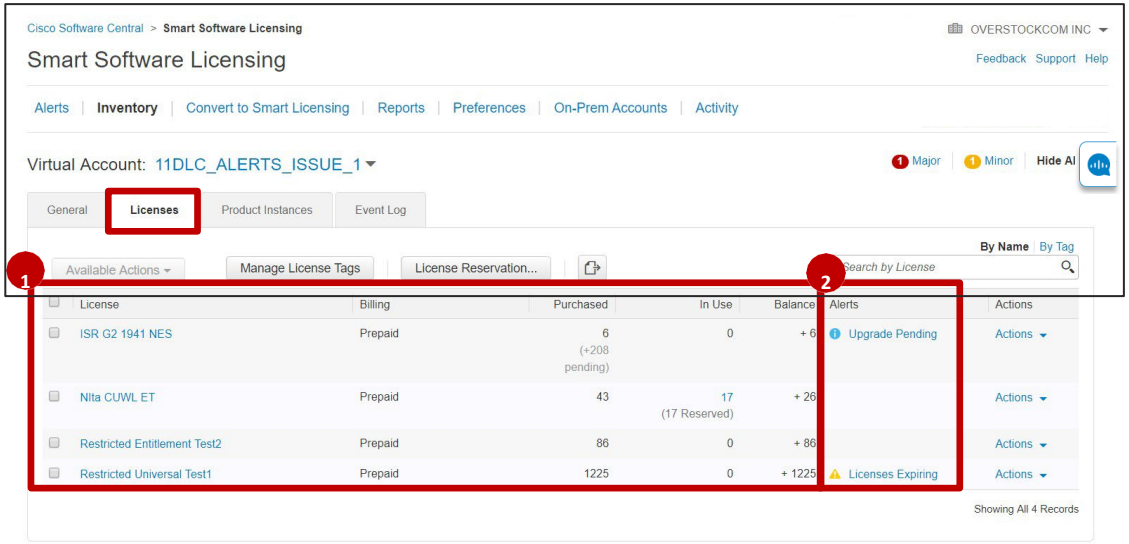
Inventory

Licenses

1. From the Licenses tab, view license inventory, license usage, which licenses have a surplus or shortage, and alerts. This keeps you informed on your licenses and actions needed to maintain compliance.

2. Alerts at line level indicate when licenses are expiring soon, so you know when to renew licenses. It will also notify you if you have insufficient licenses or if there is an upgrade pending. This will ensure you remain in compliance.



Insufficient License Alerts occur when more licenses are in use than are purchased. To remedy this issue:

- Transfer available licenses from another Virtual Account
- Purchase more licenses to return to compliance

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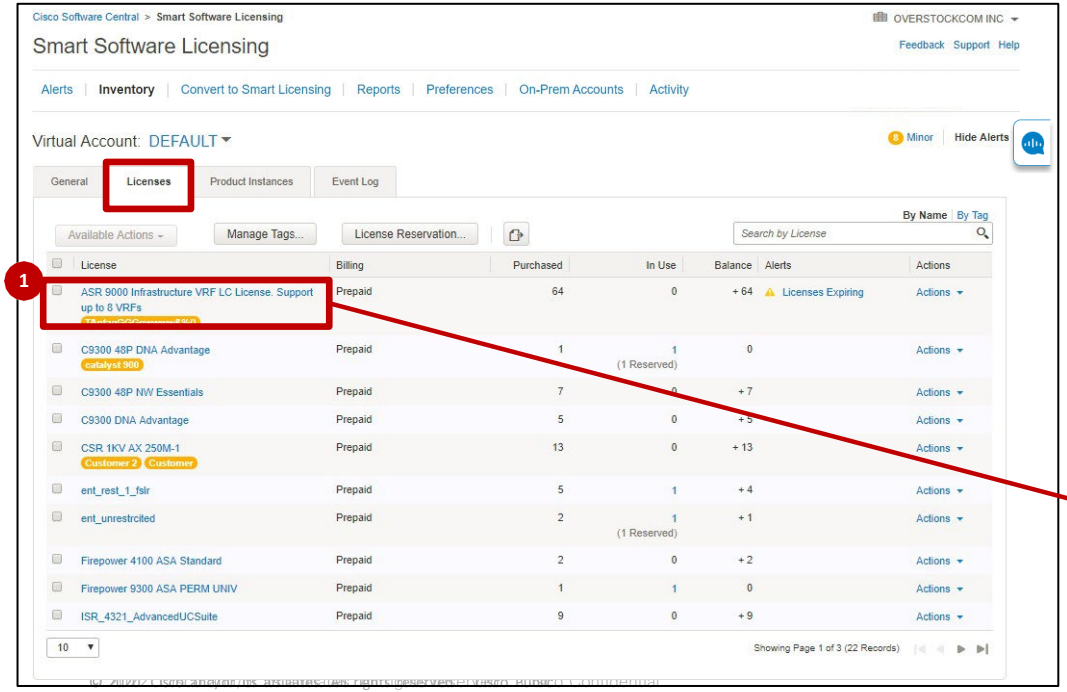
Inventory

Licenses - Details

1. Click on a license to view more details:
2. In the pop-up window, you can see 4 tabs: **Overview** (Virtual Account usage, License expiration), **Product Instances**, **Event Log**, and **Transaction History**.

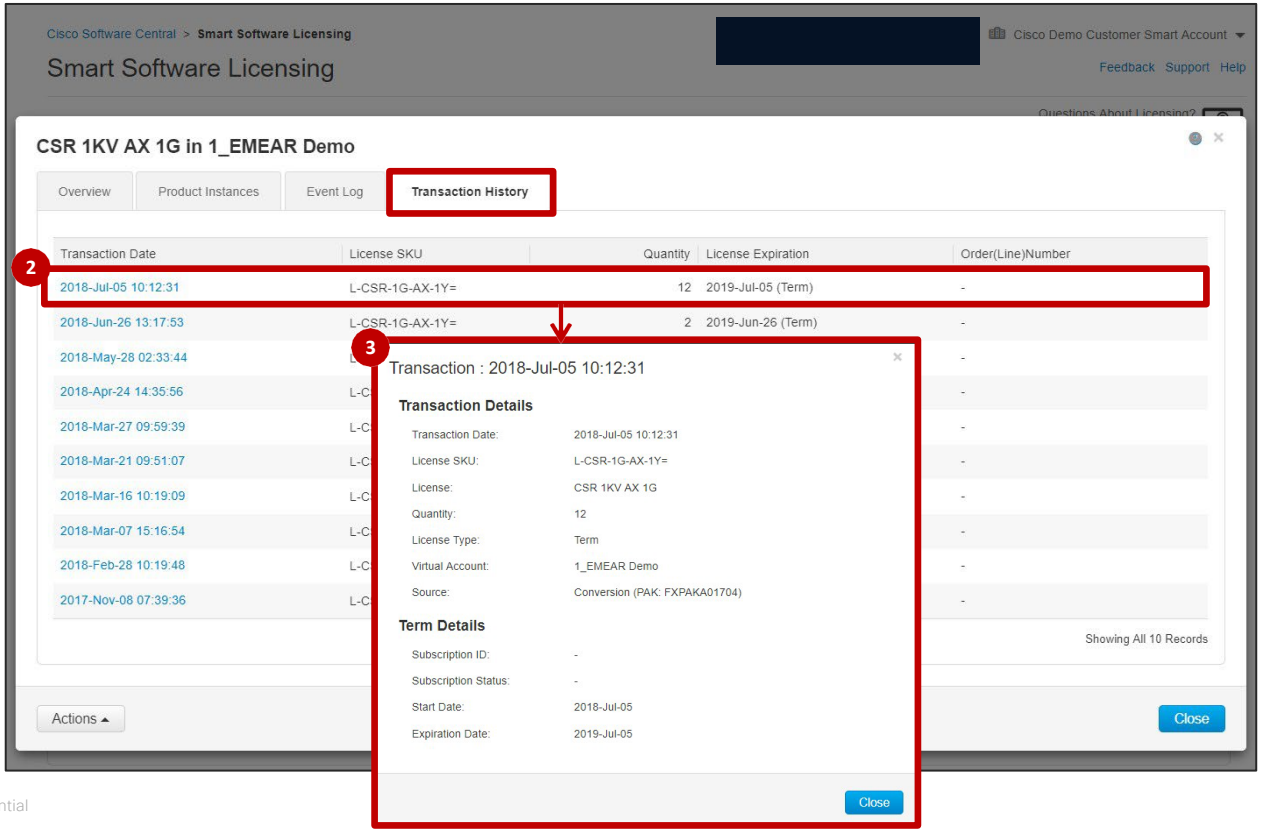


Inventory

Licenses - Details

2. In the **Transaction History** tab, you can see a table featuring details such as:
   - Transaction Date
   - License SKU
   - Quantity
   - License Expiration
   - Order (Line) Number.

3. You can also select the Transaction, and a pop-up will appear with Transaction Details.



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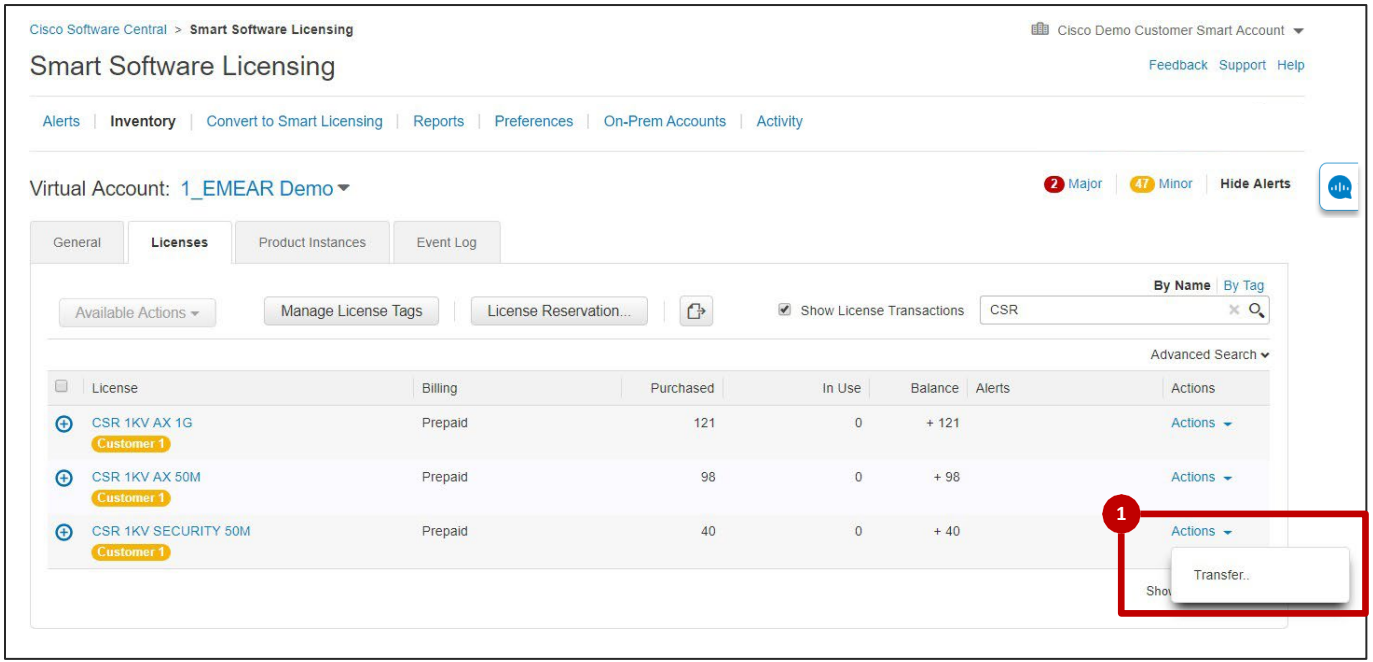
Inventory

Licenses - Transfer

There are licenses which will not be made available for transfer, such as restricted licenses that are being consumed by devices, Reporting Only Licenses, and permanently reserved or specific reserved licenses.

1. To transfer a single license, select one from the list, go to **Actions** and click **Transfer**.



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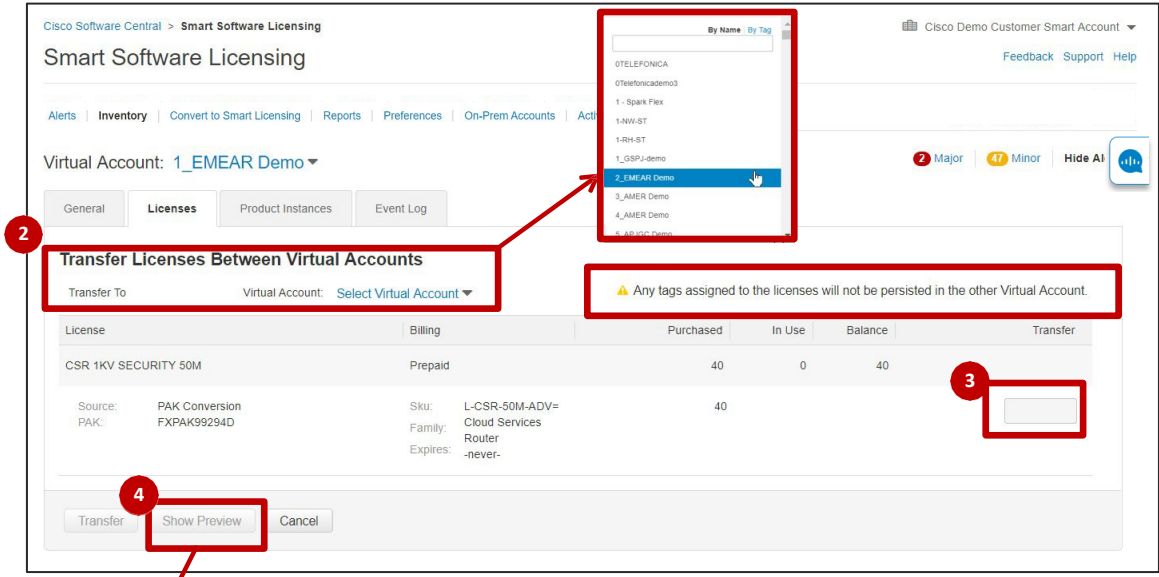
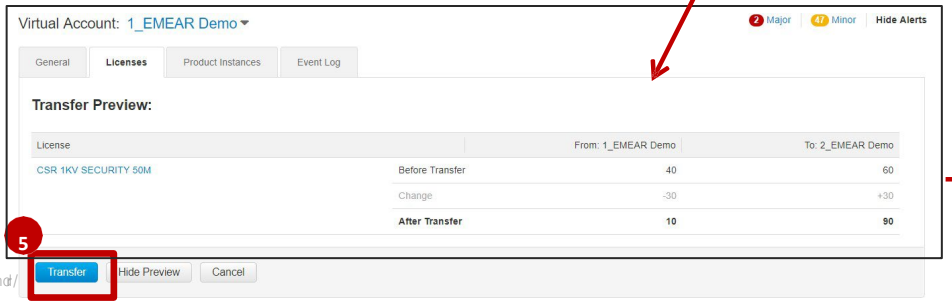
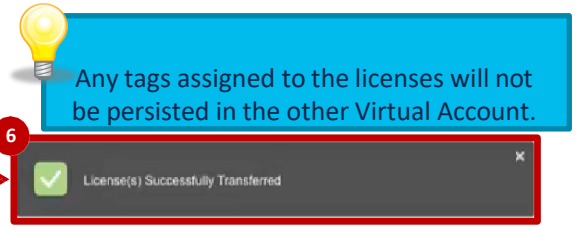
Inventory Licenses - Transfer

2. Select a destination **Virtual Account**.
   You can select it either by name or by tag.
3. Type the desired number of licenses to be transferred.
4. Click **Show Preview** to see the changes in transferred licenses between Virtual Accounts.
5. Click **Transfer**.
6. You will see a **confirmation message**.







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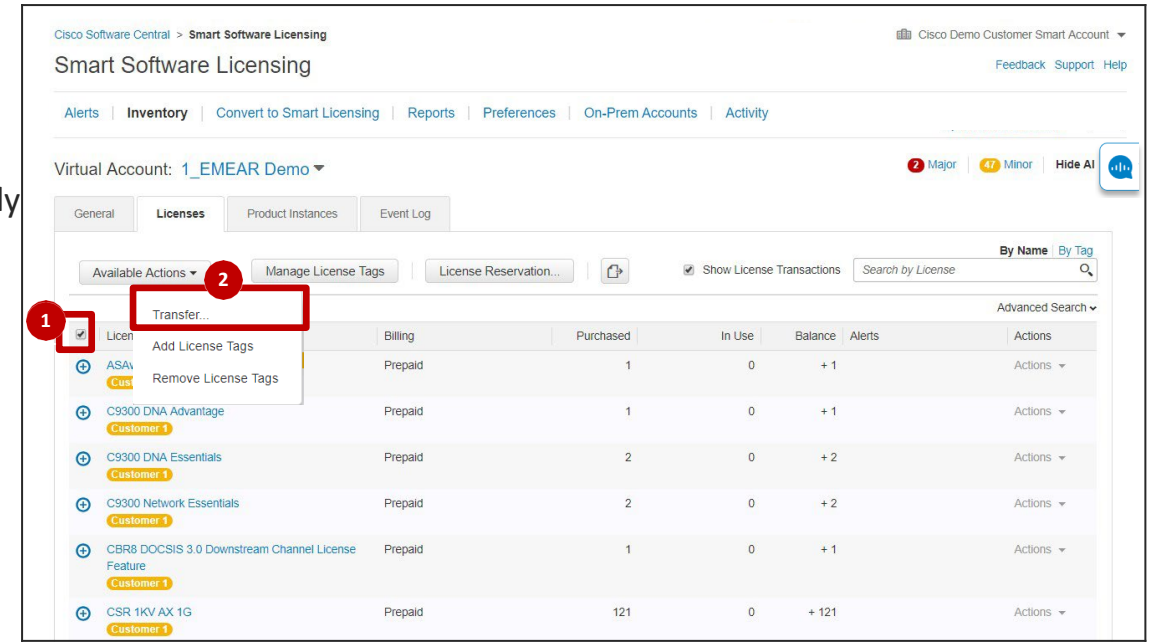
Inventory

Licenses - Transfer

1. To **transfer all of the licenses** from your view in one Virtual Account to another Virtual Account, **tick off the box on top**.

   You can also transfer multiple licenses by selecting the corresponding boxes individually

2. From **Available Actions**, click **Transfer**.



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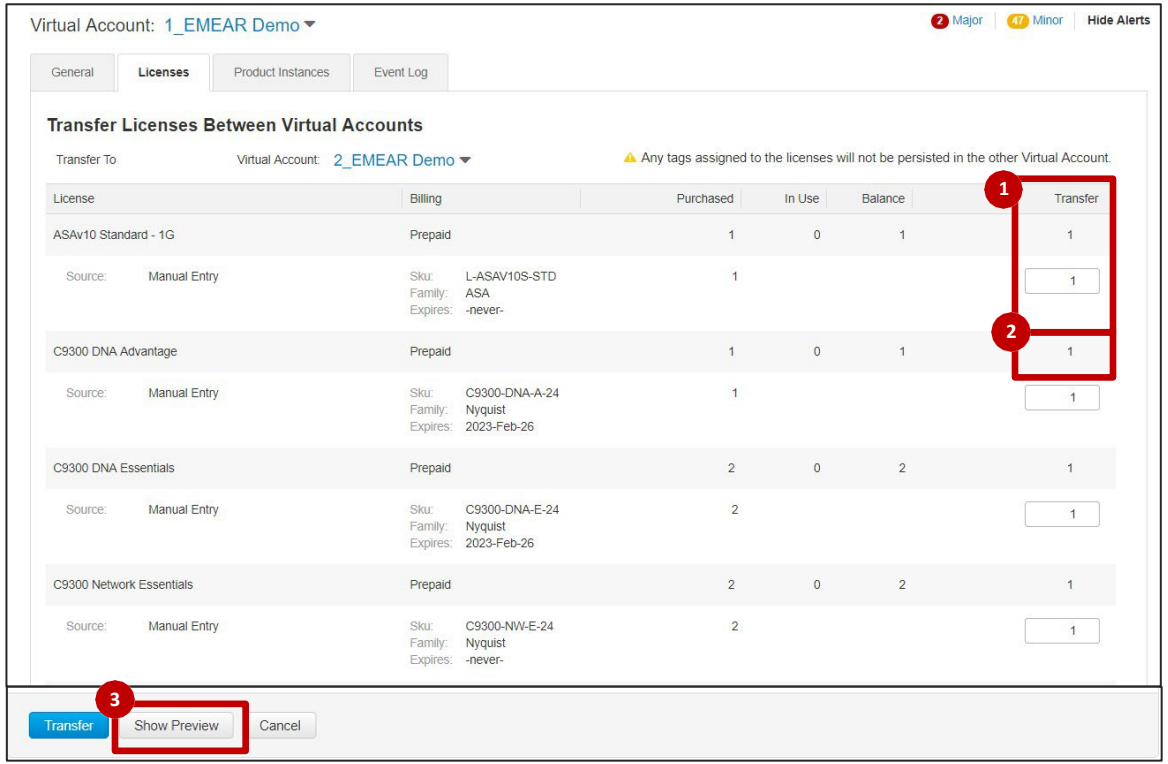
Inventory

Licenses - Transfer

1. After selecting the destination Virtual Account, type the number of licenses to transfer.

2. You will see the totals of licenses to be transferred for each license at a summary level.

3. Again, you can click **Show Preview** to see the overall changes.



Any tags assigned to the licenses will not be persisted in the other Virtual Account.

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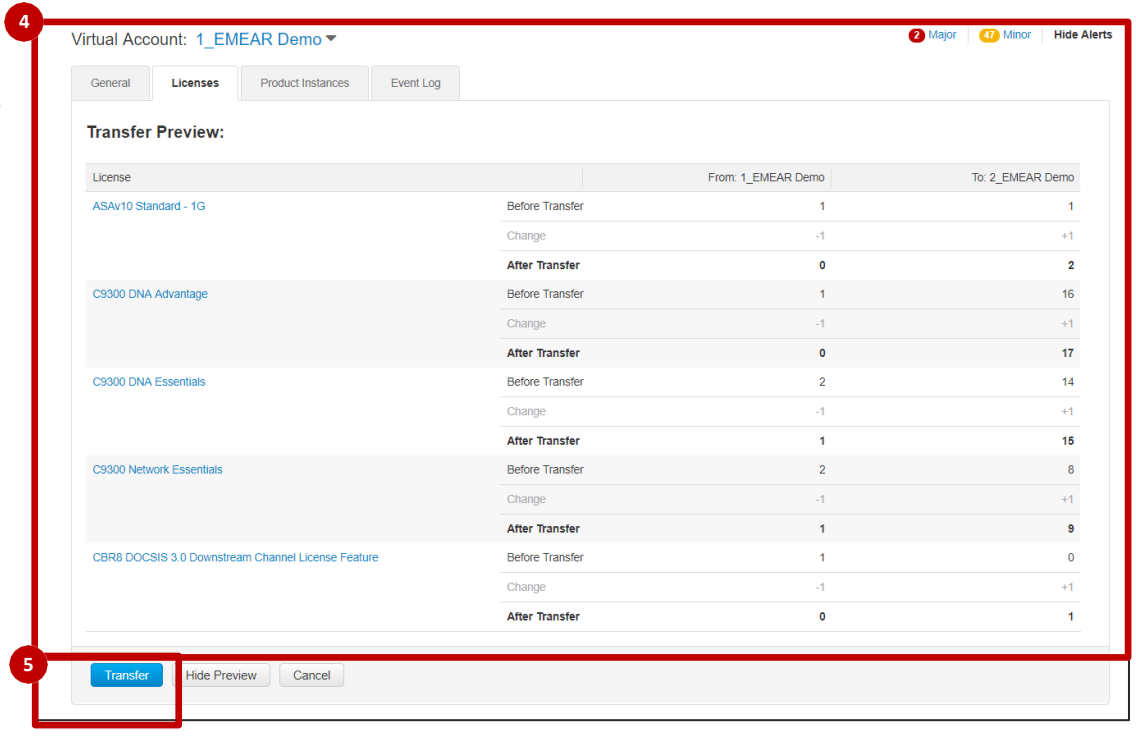
Inventory

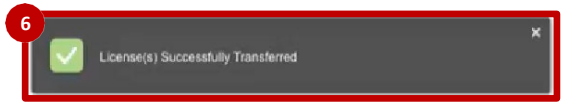
Licenses - Transfer

4. In the **preview** you can validate the changes made, and see the before and after states of the licenses being transferred.

5. To confirm the changes, click **Transfer**.

6. You will see a **confirmation message**.





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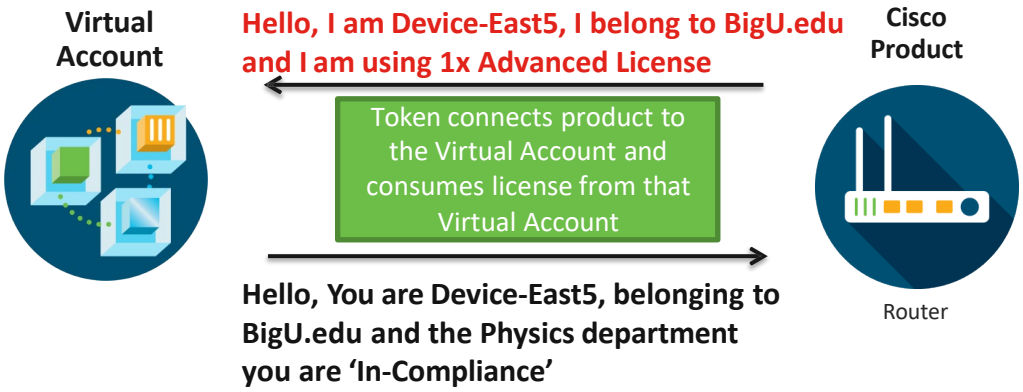
Product Instances

What are Product

A product instance is an individual device with a unique device identifier (UDI) that is registered using a product instance registration token. The token is specific to the Virtual Account and you can register several instances of a product with a single registration token. Each product instance can have one or more licenses that reside in the same virtual account.

Product instances must **periodically connect** to the SSM servers during a specific renewal period. If a product instance **fails to connect**, it continues to use the license. If you remove the product instance, its licenses are released and made available within the virtual account.

Register Product Instance Using Token



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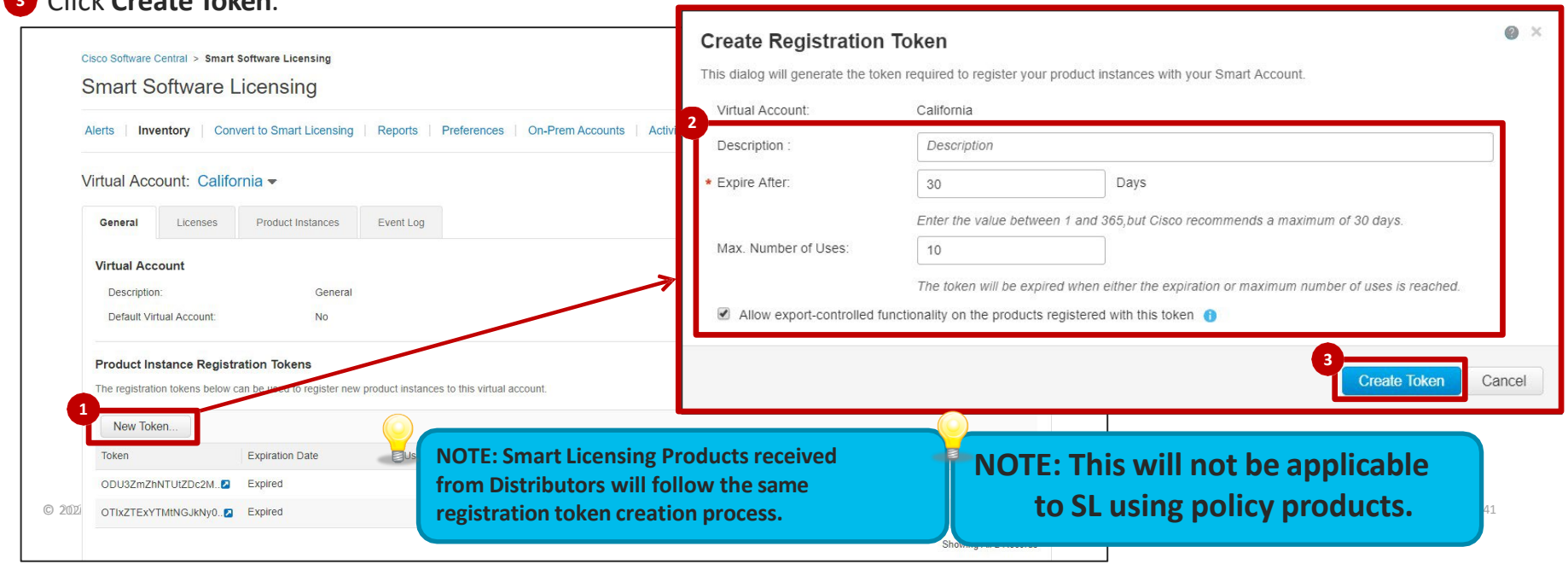
Inventory General – Register Product Instance to Virtual Account

1. In the **General** tab of Virtual Account, click **New Token**.
2. Enter a **Description** and the number of days that you want the token to be valid for. You can also specify how many times the token can be used before expiring. In that case, the token will be expired when either the expiration or maximum number of uses is reached. Select the checkbox for export-controlled functionality and accept the terms and responsibilities.
3. Click **Create Token**.



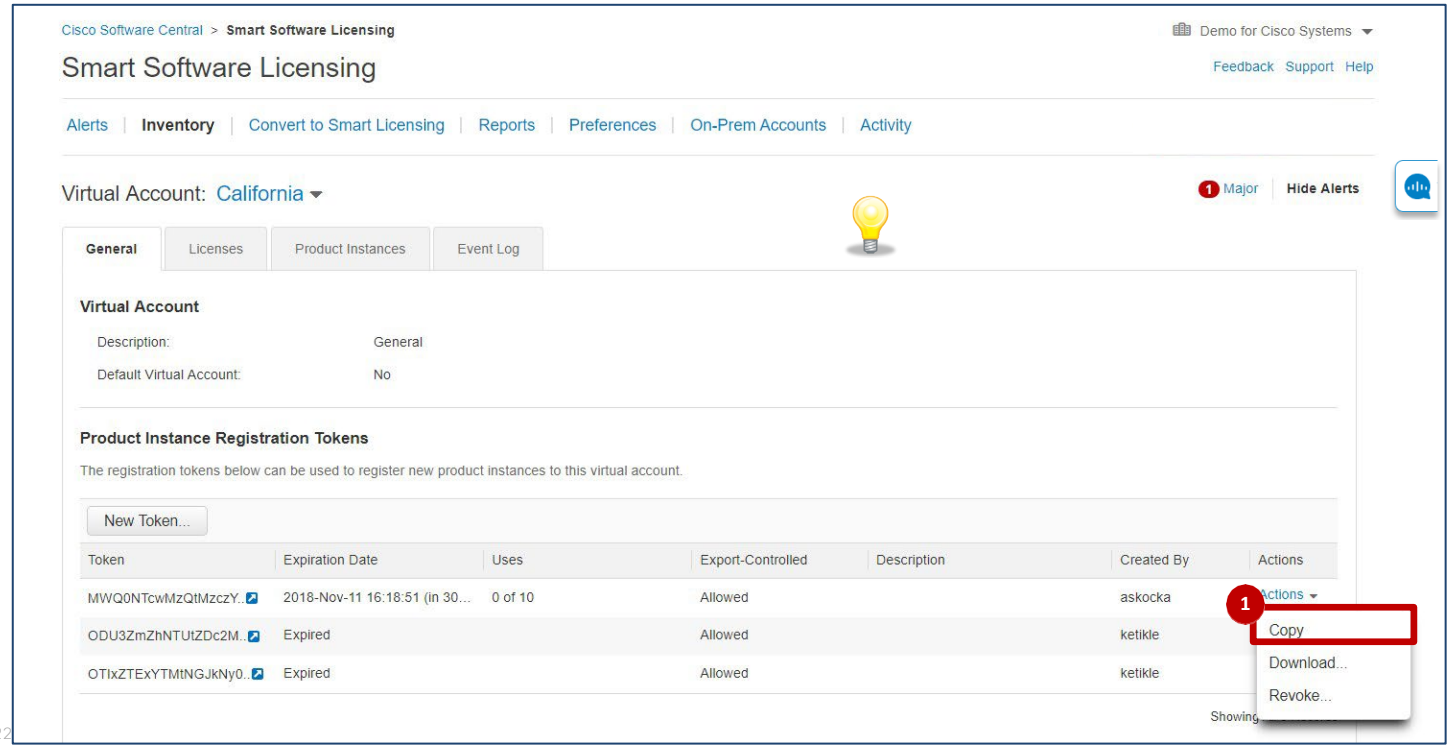
NOTE: Smart Licensing Products received from Distributors will follow the same registration token creation process.

NOTE: This will not be applicable to SL using policy products.

Inventory

General –Register Product Instance to Virtual Account

1. Click **Copy** to copy the newly created token, or **Download** the token to notepad, for use during product configuration and registration process.



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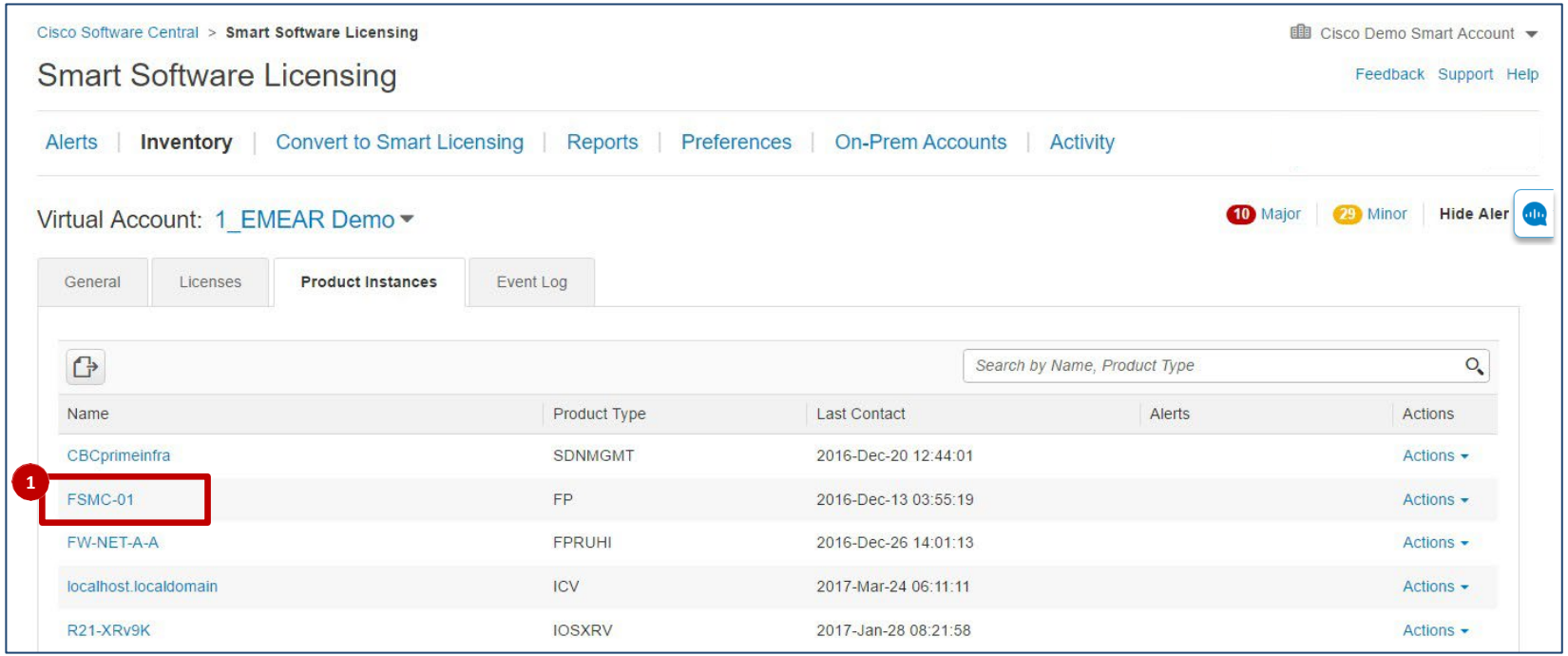
Inventory

Product Instances

1. New product instance information is displayed.



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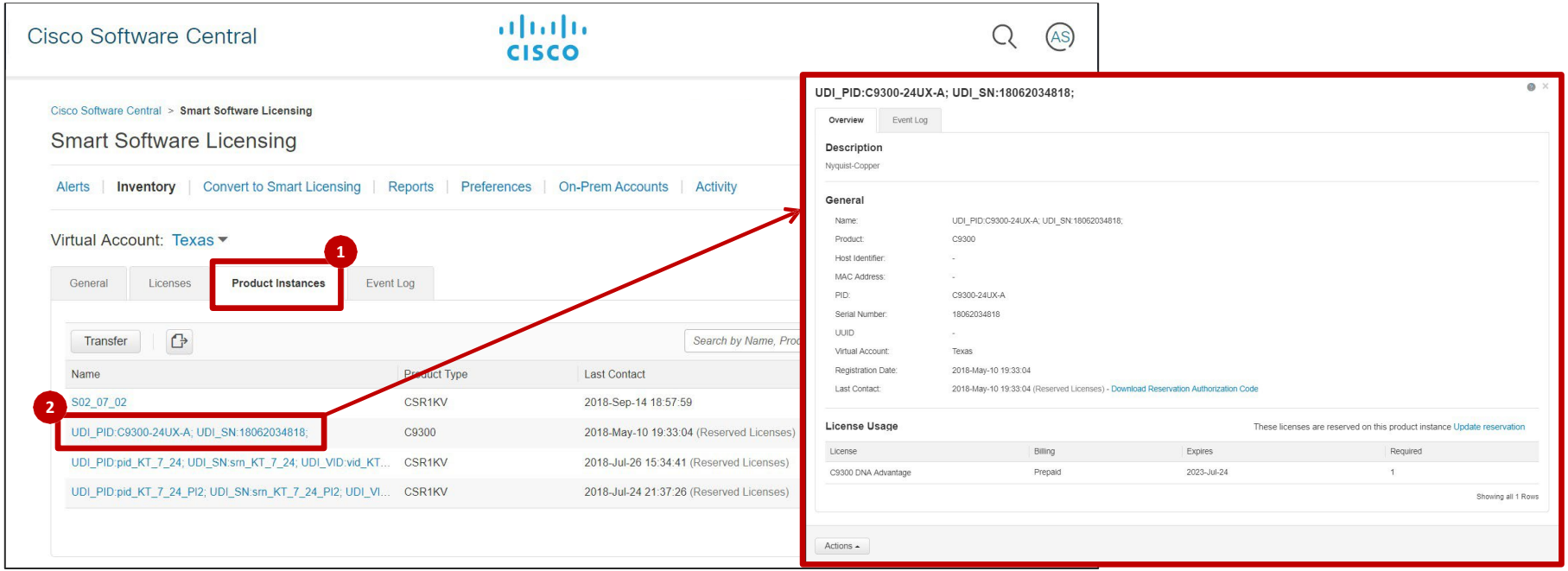
Inventory

Product Instance Details

Any license or product instance that is not in compliance with the smart licensing agreement creates an alert. (e.g. more licenses in use than purchased)

1. In the Product Instance tab, product instances display.
2. Click the product instance for more details on the Product, License usage and Event Log.



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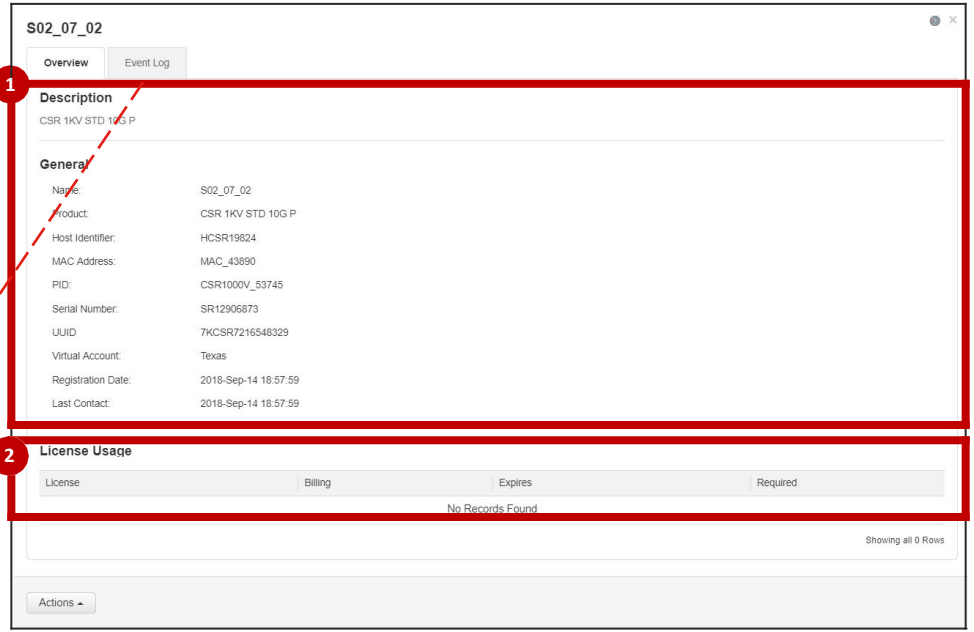
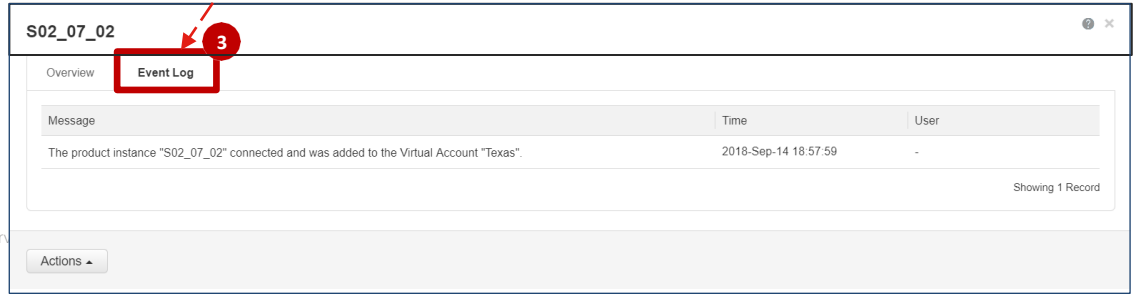
Product Instance Details

1. In the Product Instance's **Overview** tab, you can see the description of the Product and other details, such as Host Identifier, MAC Address, PID, Serial Number, UUID (if available), Virtual Account, Registration Date and Last Contact.

2. You can also see the details of License Usage.

3. In addition, you can view the Event Log.





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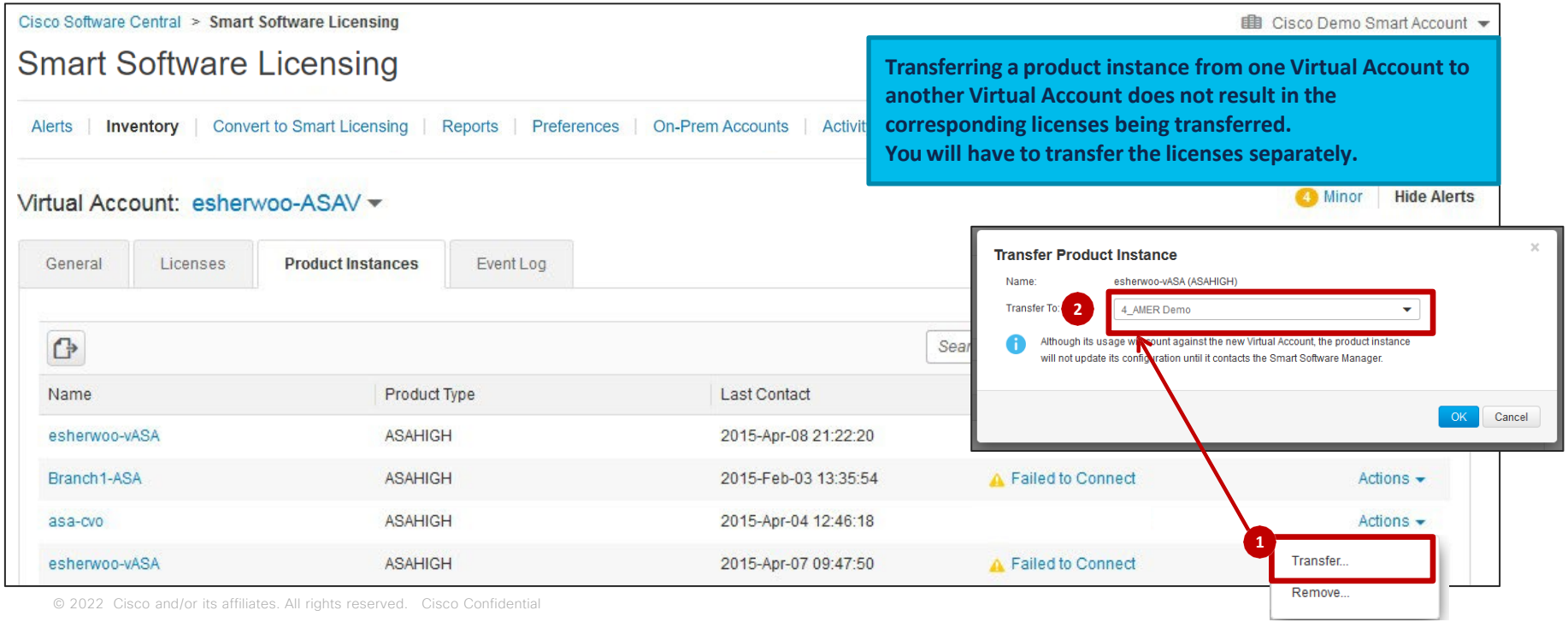
Inventory

Transfer Product Instances

1. Under Action dropdown, click **Transfer**.
2. In the **Transfer Product Instance** dialog box, select the Virtual Account to transfer to and click **Ok**.



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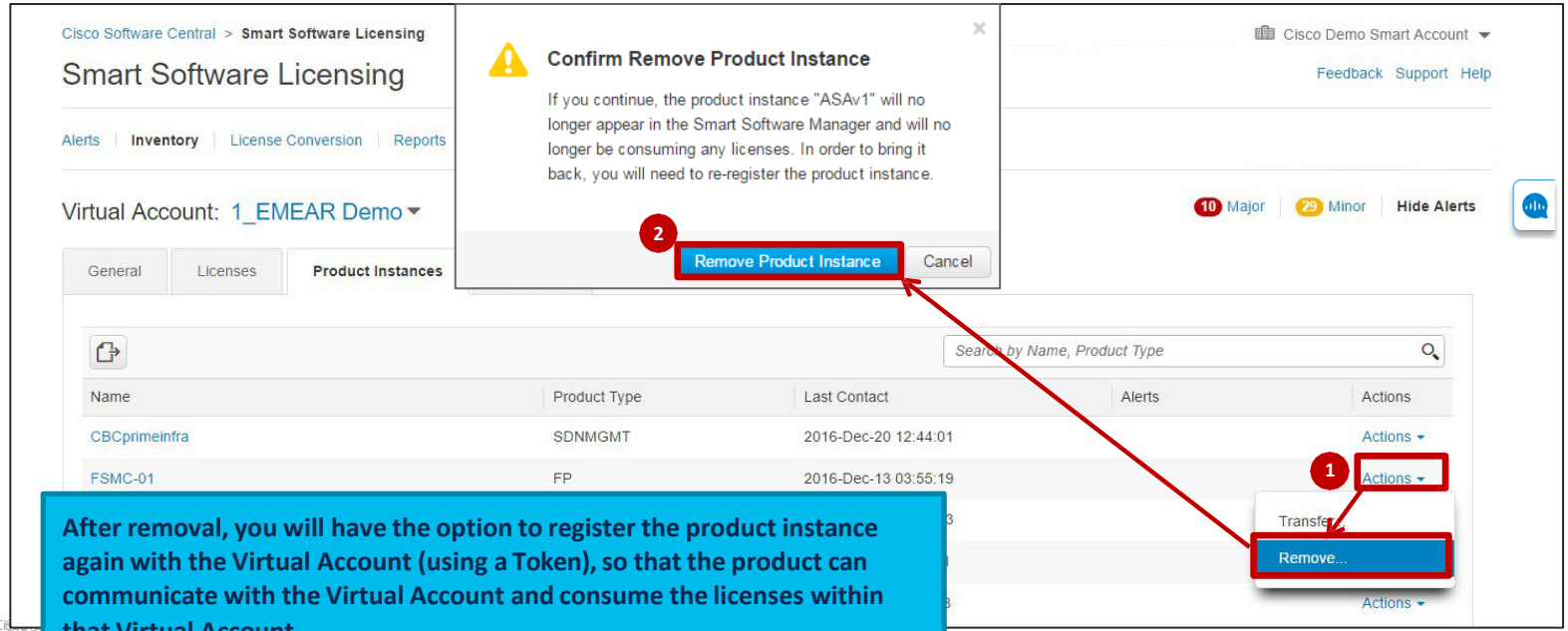
Remove Product Instances

1. You can also remove product instances. Under **Actions** click on **Remove**.
2. A pop-up window will display and you will have to confirm this action: **Remove Product Instance**.

** When you remove a product instance from Smart Software Manager, the licenses that the product instance was using are still available and can be used by other products.*



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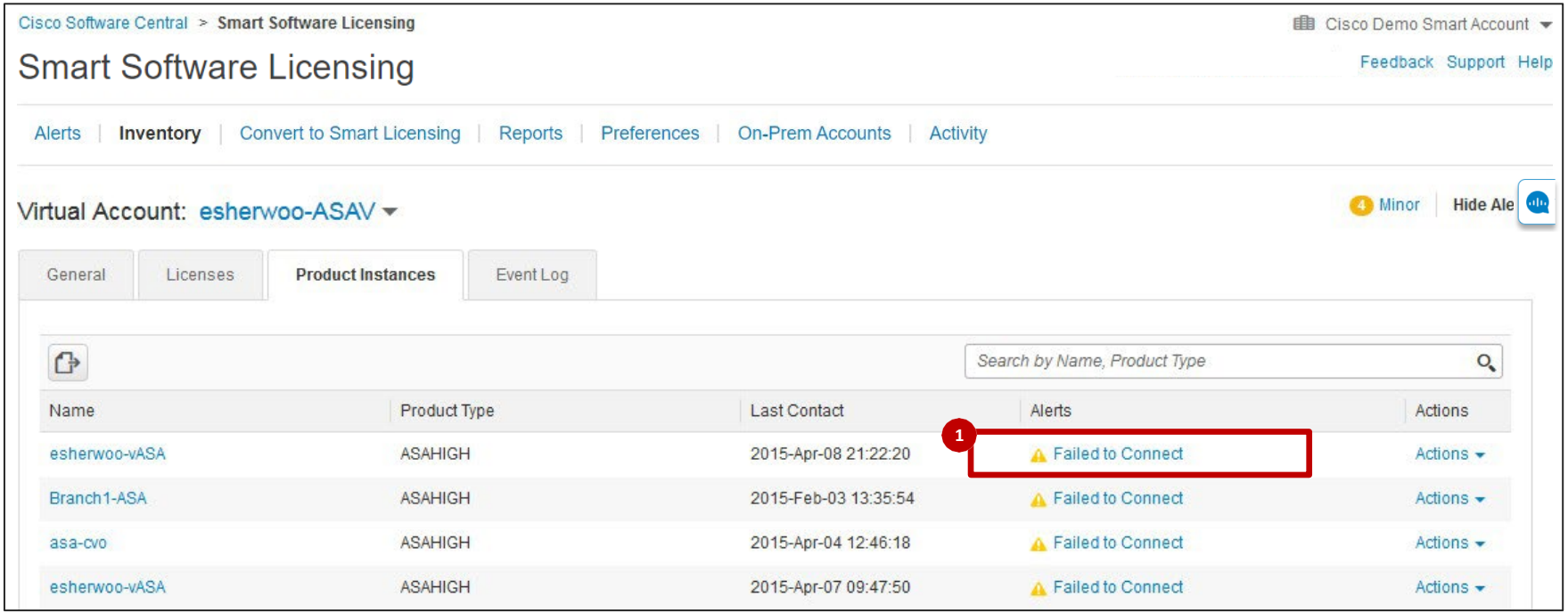
Inventory

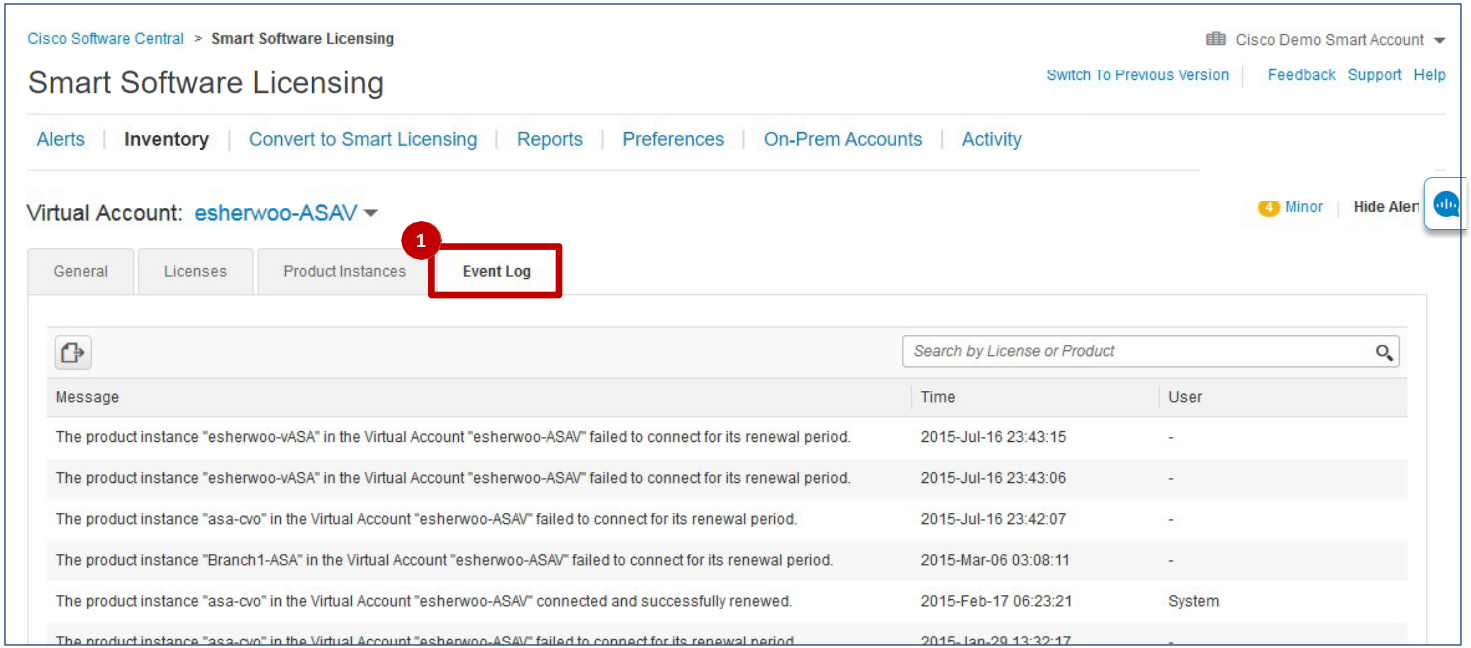
Remove Product Instances

1. The product instances need to **periodically connect** to the SSM servers during a specific renewal period. If a product instance **fails to connect**, it is marked as having a **license shortage**, but continues to use the license. *If you remove the product instance its licenses will be released and made available for other products within the Virtual Account*.



Inventory Event Log

1. In the **Event Log** tab, view recent activities and alerts of the Virtual Account to easily troubleshoot license and product inventory.



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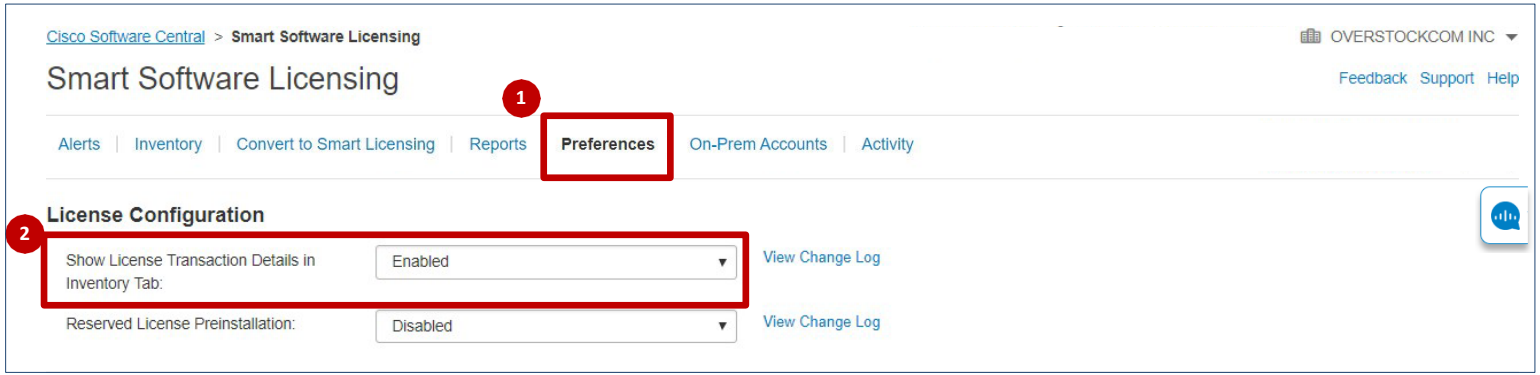
Inventory – Preferences

License Transaction Details in the Inventory Tab (Advanced View)

1. To enable **Advanced View of License Transaction Details**, go to the **Preferences** tab.

2. For **Show License Transaction Details in Inventory Tab**, change the default value from **Disabled** to **Enabled**. Once it is enabled, you will be able to see the transaction level details for licenses and perform transaction level operations.



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Inventory - Preferences

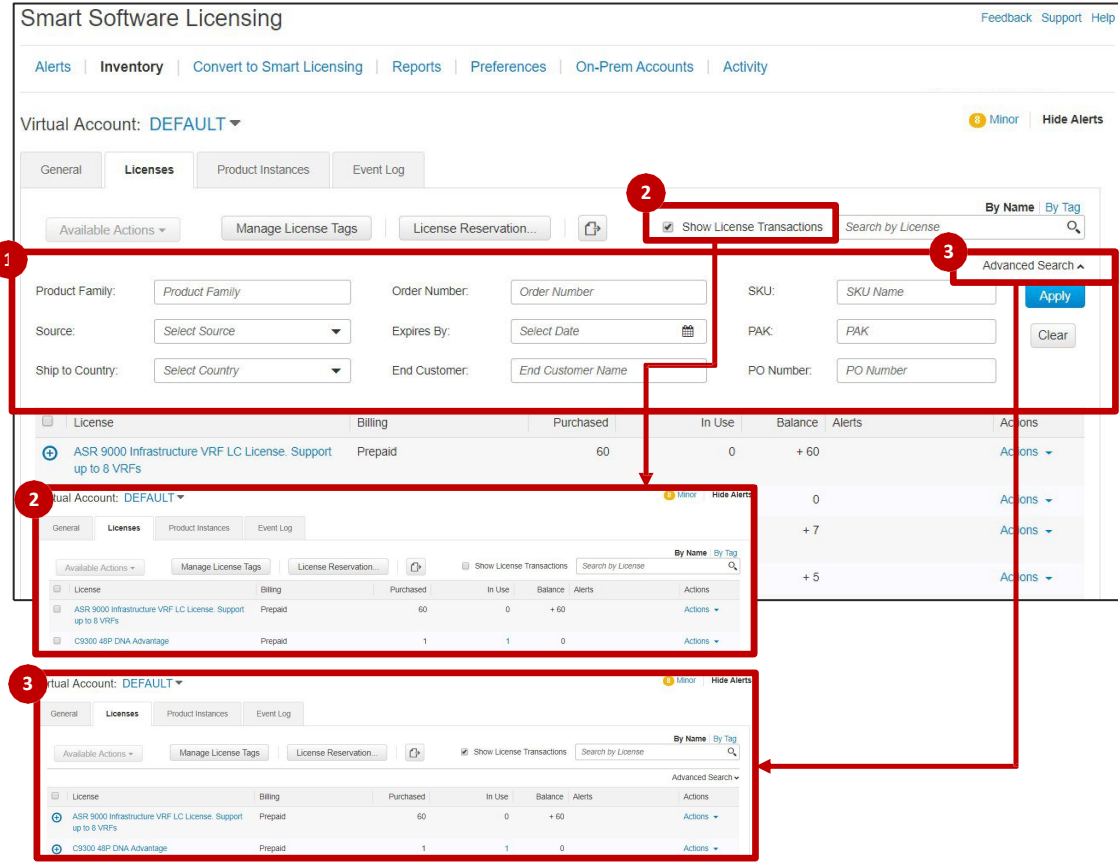
License Transaction Details in the Inventory Tab (Advanced View)

When **Show License Transaction Details in Inventory Tab** is enabled, the **Advanced View** and **Advanced Search** will automatically show.

1. With the **Advanced View** you can search for licenses by: **Product family, Source, Ship to Country, Order number (Sales Order number or Web Order ID), End Customer, SKU, PAK, PO Number, Expiration Date.**

2. To disable this view entirely, tick off the **Show License Transactions** option and you'll go back to the normal screen.

3. You can also minimize the Advanced Search View.



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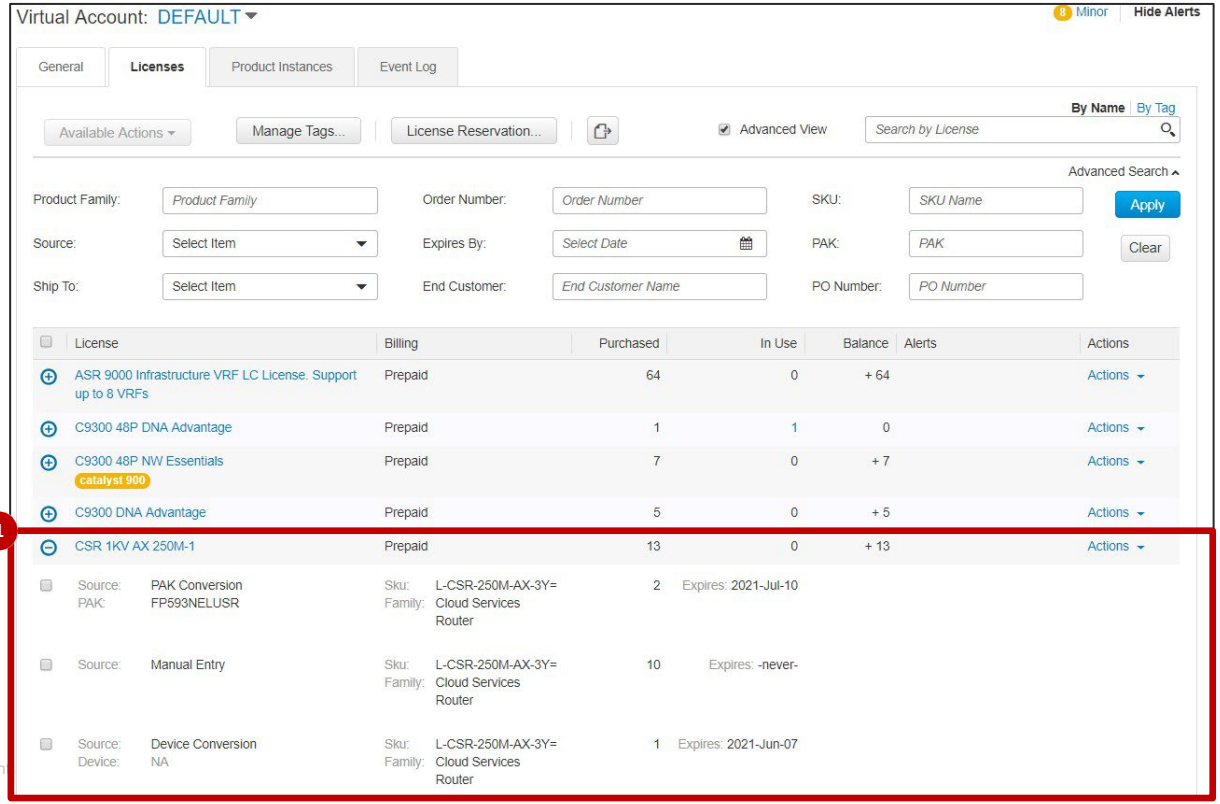
Inventory - Preferences

License Transaction Details in the Inventory Tab (Advanced View)

1. With the **Advanced View** you can expand the view for each license summary, which will show transaction level details of the licenses.

Note: *There are various sources a license can come from:*

- *Manual Entry*
- *PAK Conversion*
- *Device Conversion*
- *DLC Device Conversion*
- *EA Workspace*
- *Device Request*
- *Order Line*



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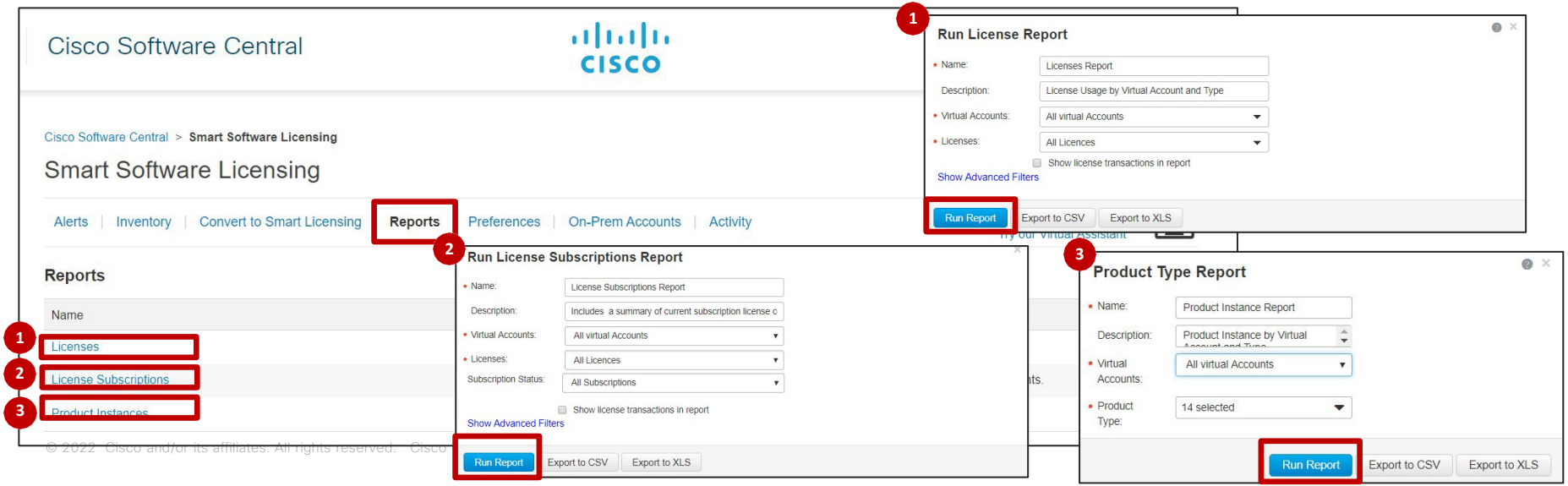
Report
s

Licenses and Product Instance Details

Generate reports for selected Virtual Accounts: you can run reports in the tool (it will open in a web page of your browser), or export to CSV or XLS. Click on the report name (e.g. **Licenses**) to view the report customization pop-up and run the report.

1. The **License report** provides a summary of licenses count and usage.
2. The **License Subscription report** is a summary of current subscription licenses counts and usage.
3. The **Product Instance report** includes count and listing of product instances.



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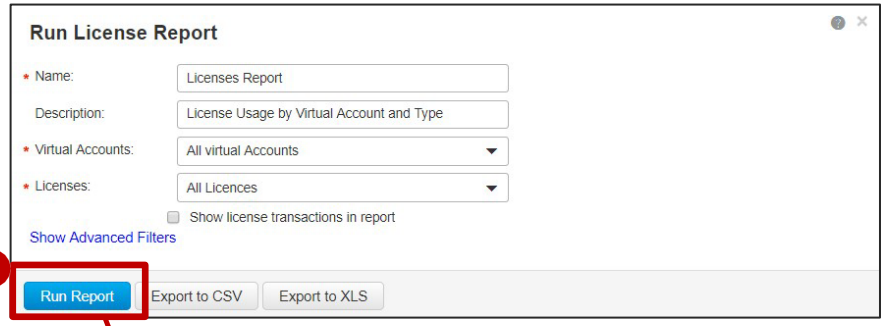
Report

Licenses and Product Instance Details



1. Under any of the reporting options (**Licenses, License Subscriptions, Product Instances**), when you click on **Run a Report**, you will be redirected to the Report screen.

Note: This is a sample data for the License Report.

Licenses Report
2018 Feb, 21 15:12:40
BAT_SPLA

Export to CSV

Total License Usage

Licenses	Billing	Purchased	In Use	Reserved	Balance	Duplicates
C9300 DNA Essentials	Prepaid	5	0	-	+5	-
CSR 1KV APP 10G	Prepaid	1	0	-	+1	-
CSR 1KV APPX 100M	Prepaid	51	0	-	+51	-
CSR 1KV Appx 10G	Prepaid	40	0	-	+40	-
CSR 1KV APPX 10M	Prepaid	50	0	-	+50	-
CSR 1KV APPX 2500M	Prepaid	20	9	9	+11	-
CSR 1KV APPX 250M	Prepaid	40	20	10	+20	-
CSR 1KV APPX 500M	Prepaid	143(+107 Pending)	80	61	+63	-
CSR 1KV APPX 50M	Prepaid	51	0	-	+51	-
CSR 1KV APPX 5G	Prepaid	20	0	-	+20	-
CSR 1KV AX 10M	Prepaid	388(+107 Pending)	107	107	+281	-
CSR 1KV AX 50M	Prepaid	13(+107 Pending)	0	-	+13	-
CSR 1KV IP BASE 100M	Prepaid	10	0	-	+10	-
CSR 1KV IP BASE 10M	Prepaid	116	5	5	+111	-
CSR 1KV IP BASE 500M	Prepaid	165	19	19	+146	-
CSR 1KV IP BASE 50M	Prepaid	218(+217 Pending)	96	96	+122	-
CSR 1KV SECURITY 100M	Prepaid	50	2	2	+48	-
CSR 1KV SECURITY 10M	Prepaid	463(+217 Pending)	139	139	+324	-
CSR 1KV SECURITY 500M	Prepaid	50	4	4	+46	-
CSR 1KV SECURITY 50M	Prepaid	14(+107 Pending)	0	-	+14	-

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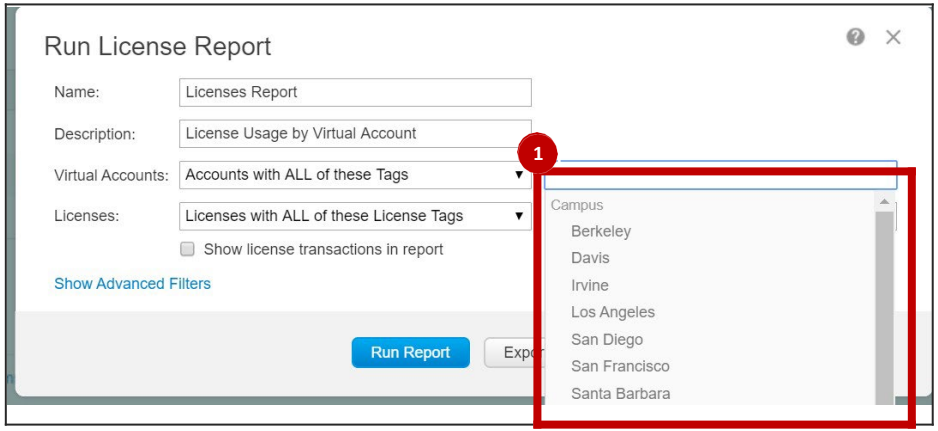
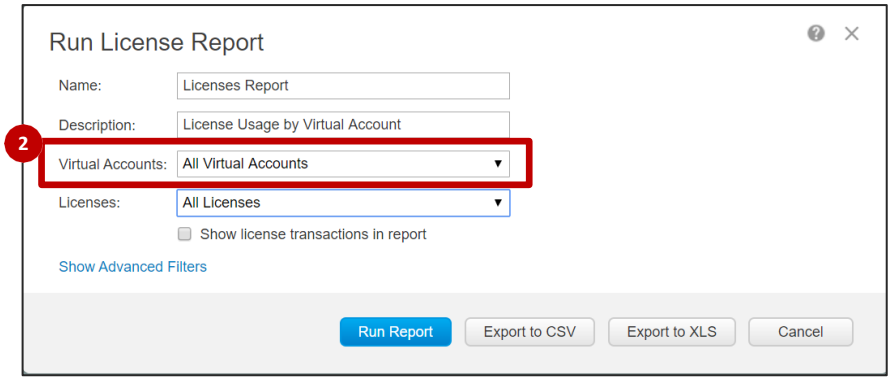
Report

License Reports

1. If you select **Accounts with ALL of these Tags**, you will search for multiple tags and only the Virtual Accounts with ALL of the tags that you select will be shown in the report.



2. If you select **All Virtual Accounts**, there are no search functionalities since the report will pull from all Virtual Accounts within the Smart Account.



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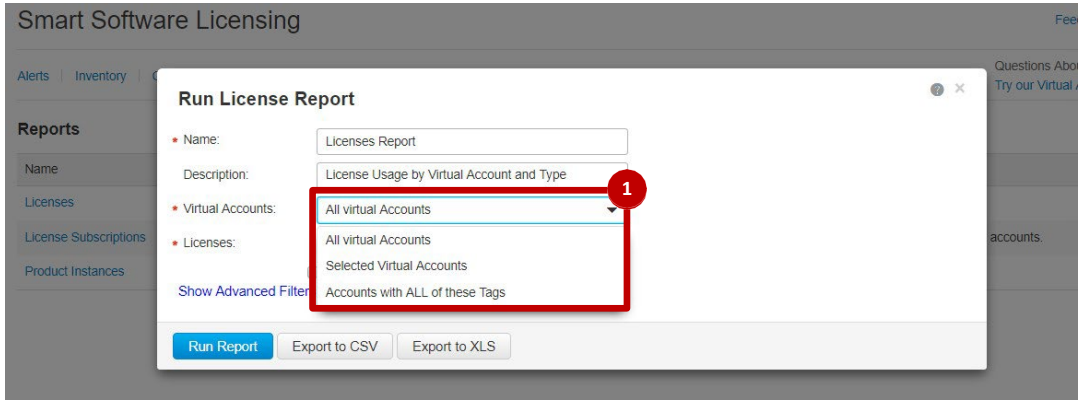
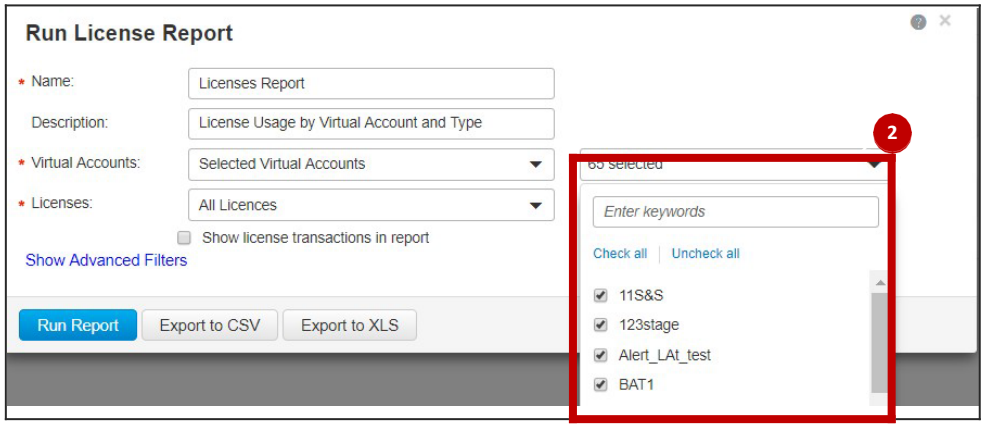
Report

License Reports

1. Under **Run License Report,** you can **select Virtual Accounts** from the drop down menu. **You have 3 options**:
   - **All Virtual Accounts**
   - **Selected Virtual Accounts**
   - **Accounts with ALL of these tags**



2. If you choose **Selected Virtual Accounts,** you will have the option to **select Virtual Accounts** for the report. You have the option to select which Virtual Accounts you would like to run a report on. You can search by keywords.



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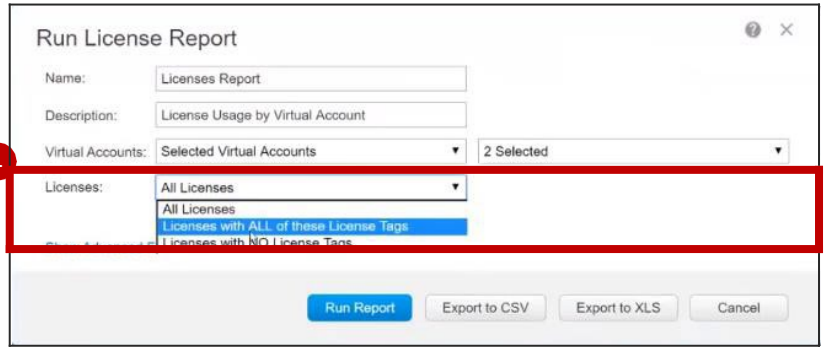
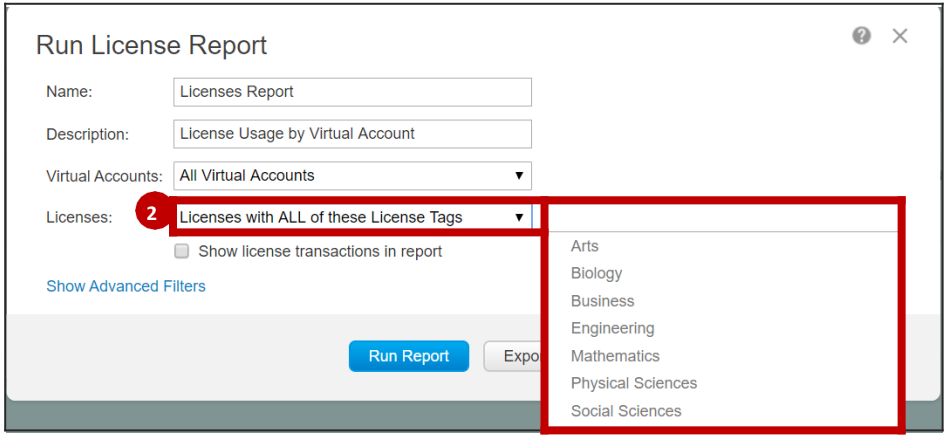
Report

License Reports

1. You can also **filter by Licenses**.
   You can choose to view a report generated for the **All Licenses, Licenses with ALL of these License Tags** or **Licenses with NO License Tags**.



2. If you choose to search for **Licenses with ALL of these Tags**, you can choose a number of tags from the drop down menu and only the licenses with all of these tags associated with them will be included in the report.



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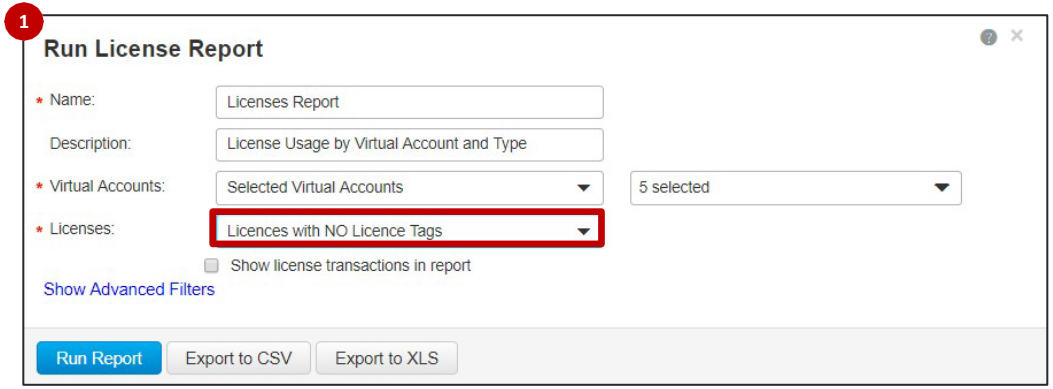
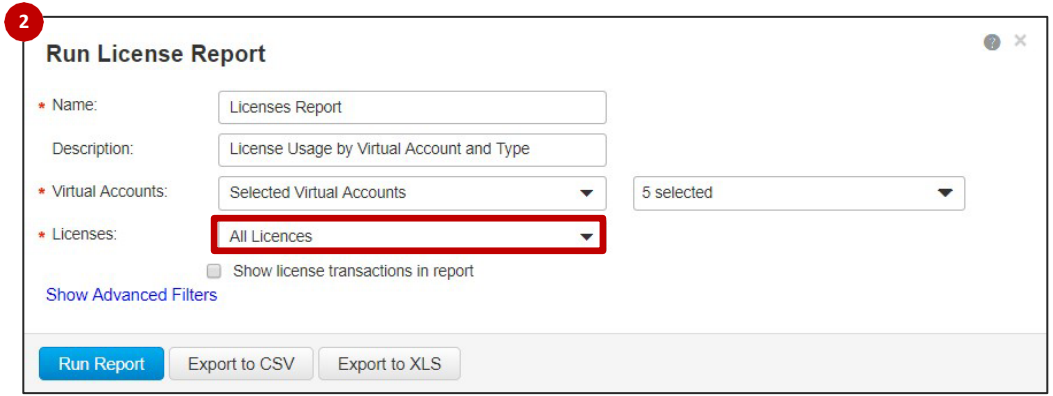
Report

License Reports

1. If you choose to search for **Licenses with NO License Tags**, the report will pull licenses that have NO tags associated with them.



2. If you choose **All Licenses**, the report will pull all of the licenses that the user has access to.



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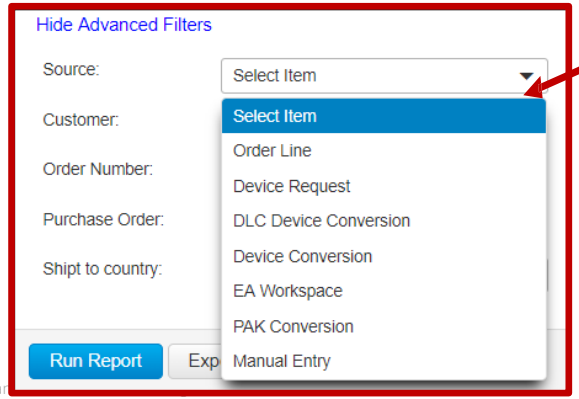
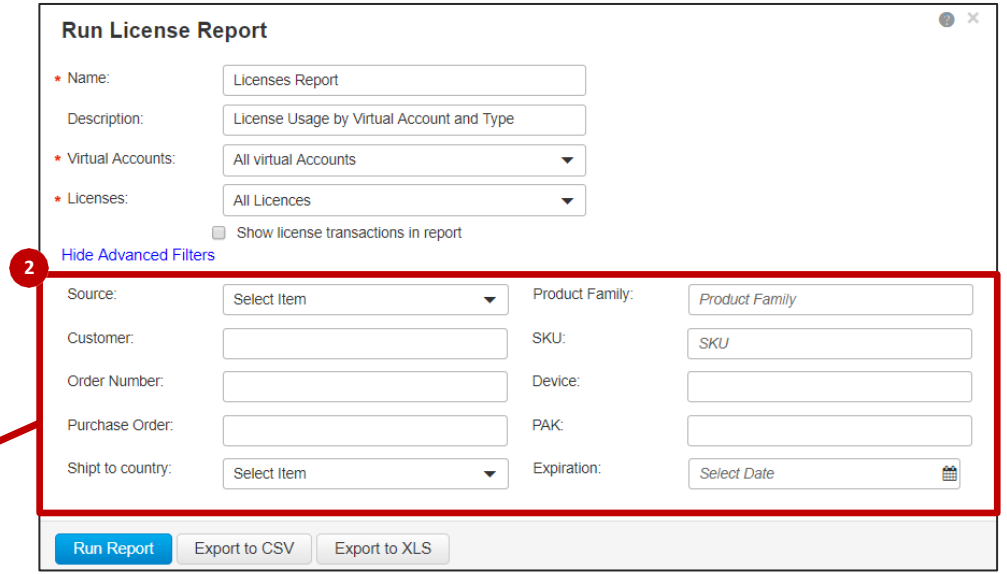
Report

S
Advanced Filters

2 In addition to the Virtual Accounts, Licenses and Subscription Status filters, you can add **Advanced Filters**.

The **Advanced Filters** Section allows you to **filter by Source (drop down options shown below), Customer, Order Number, Purchase Order, Ship to Country, Product Family, SKU, Device, PAK, and Expiration.**





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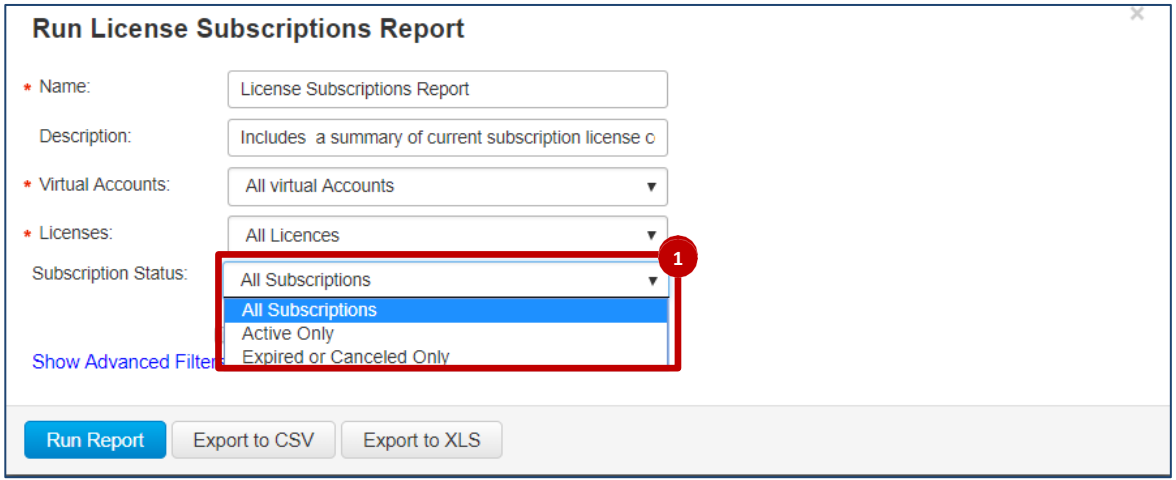
Report

License Subscriptions Report

1 Under the **License Subscription Report**, you can also select **Virtual Accounts** and **Licenses**.
For the License Subscriptions Report you can select a Subscription Status:

- All Subscriptions
- Active Only Subscriptions
- Expired or Cancelled Only Subscriptions



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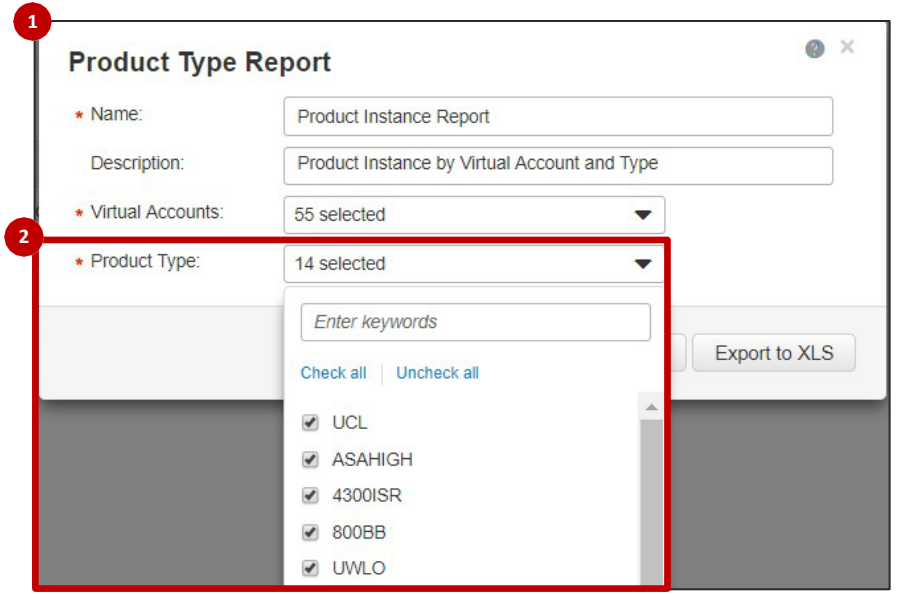
Report

Product Instances Report

1. Under the **Product Instance Report**, you are also able to select the **Virtual Accounts.**

2. In addition, you can choose **Product Types**.



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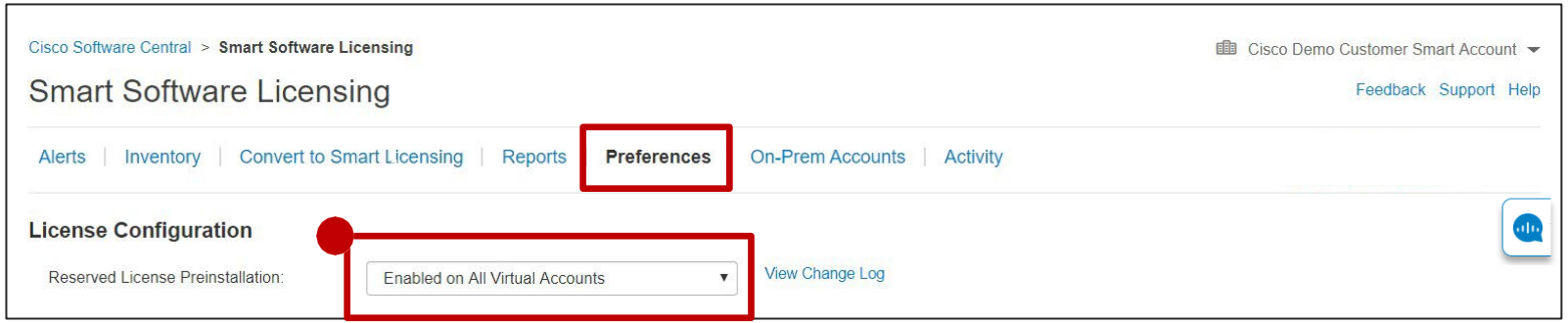
Preferenc

License Configuration

1. In the **Preferences Tab**, a Smart Account Admin can view the **License Configuration** section.
   - If Specific License Reservation is enabled in the Smart Account, the Smart Account Admin will have the option to enable Reserved License Preinstallation.



Specific License Reservation (SLR) is a feature used in highly secure networks.
If you need to enable SLR, open a case via **Support Case Manager (SCM)**
Once SLR is enabled, the SA Admin will have the option to to enable Reserved License Pre-installation
- For more details, check this Quick Reference Guide

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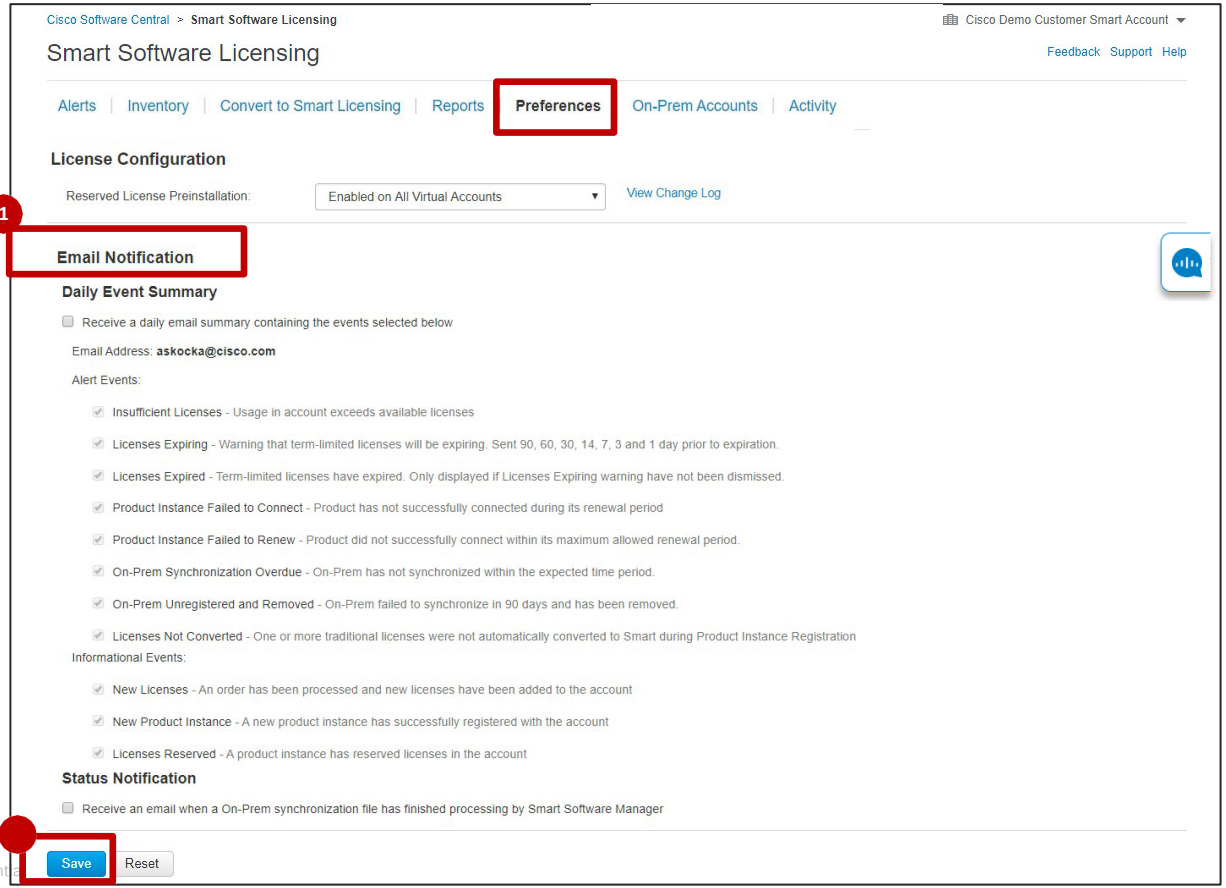
Preferenc

Select Notifications

The **Email notification settings** are now in the **Preferences Tab**, below the **License Configuration** section.

1. Here you can select the email notifications you would like to receive.

2. Click **Save** before transferring to a new page.



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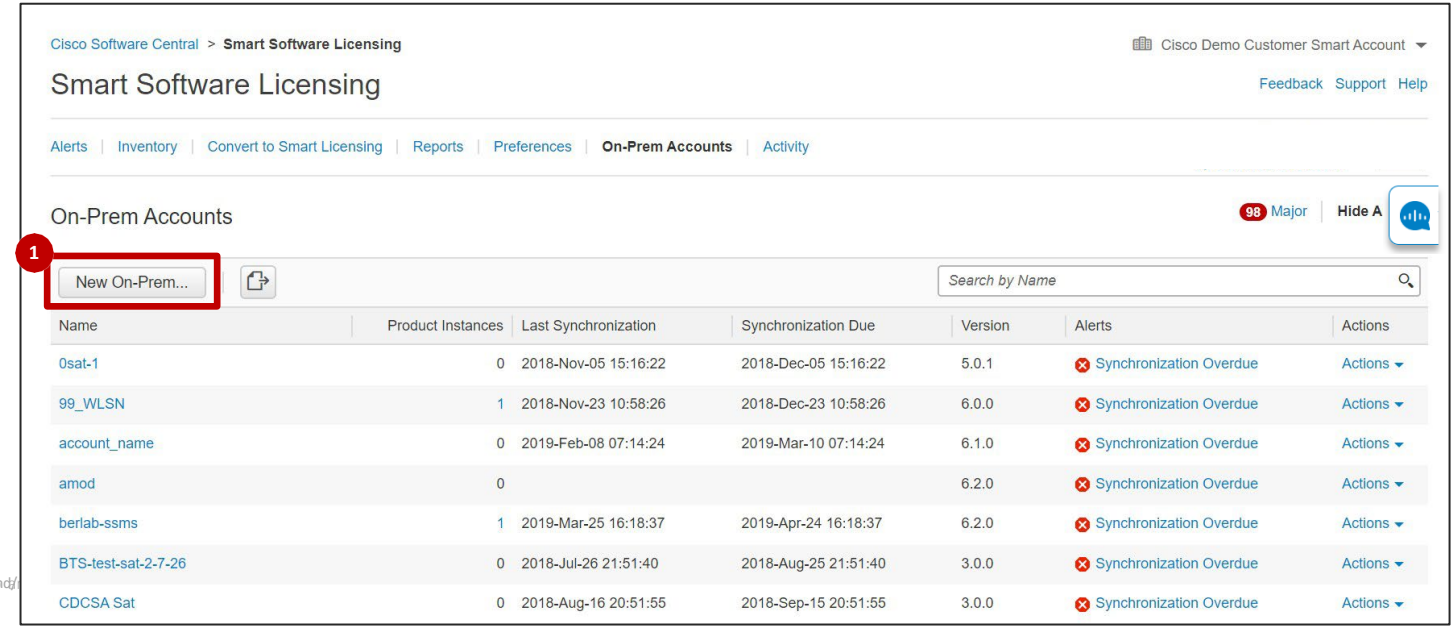
On-Prem Accounts

SSM On-Prem (Offline Connector)

For security sensitive Customers who do not want to manage their install base using a direct Internet connection, the Smart Software Manager On-Prem is installed on the Customer premises, and provides a subset of Cisco SSM functionality.

1. On the main **On-Prem Accounts** tab, you will see any listed On-Prem Accounts, and you will be able to **create a New On-Prem**.



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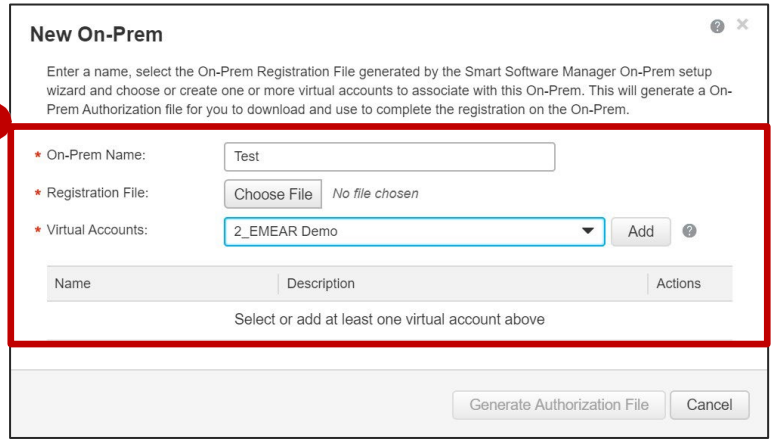
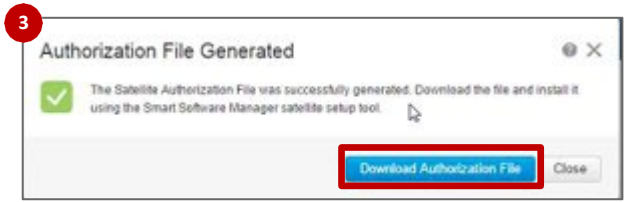
On-Prem Accounts

SSM On-Prem (Offline Connector)

2. Upon selecting **New On-Prem**, a pop-up will prompt you to enter the following information: On-Prem Name, Registration File and Virtual Accounts.
3. Once you click on **Generate Authorization File**, a pop-up will appear through which you can download the authorization file by clicking Download Authorization File.





Reference the SSM Cisco.com page for more information on SSM On-Prem. You will also find the following documents:

- **SSM On-Prem Overview presentations, Users Guide, Installation Guide, Data Sheet, Overview, FAQ.**

What's more, the SSM On-Prem Overview presentation provides a very good summary of SSM On-Prem deployment models, system requirements, features, network synchronization, etc.

- **SSM On-Prem Enhanced Edition**

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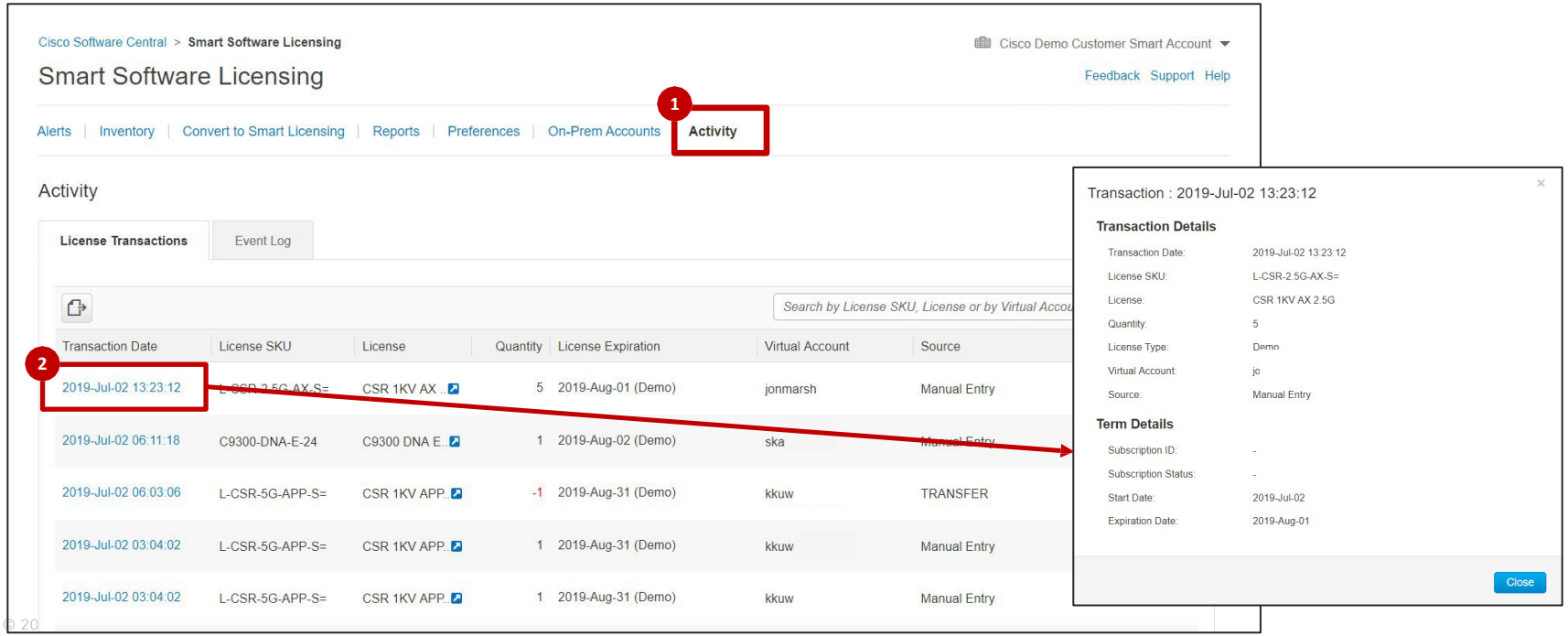
Activit

Holistic View of License Transactions

1. On the Activity page, in the Transaction History tab, view License Transactions and additional details.
2. You can click on the Transaction Date link to view Transaction Details and Term Details.



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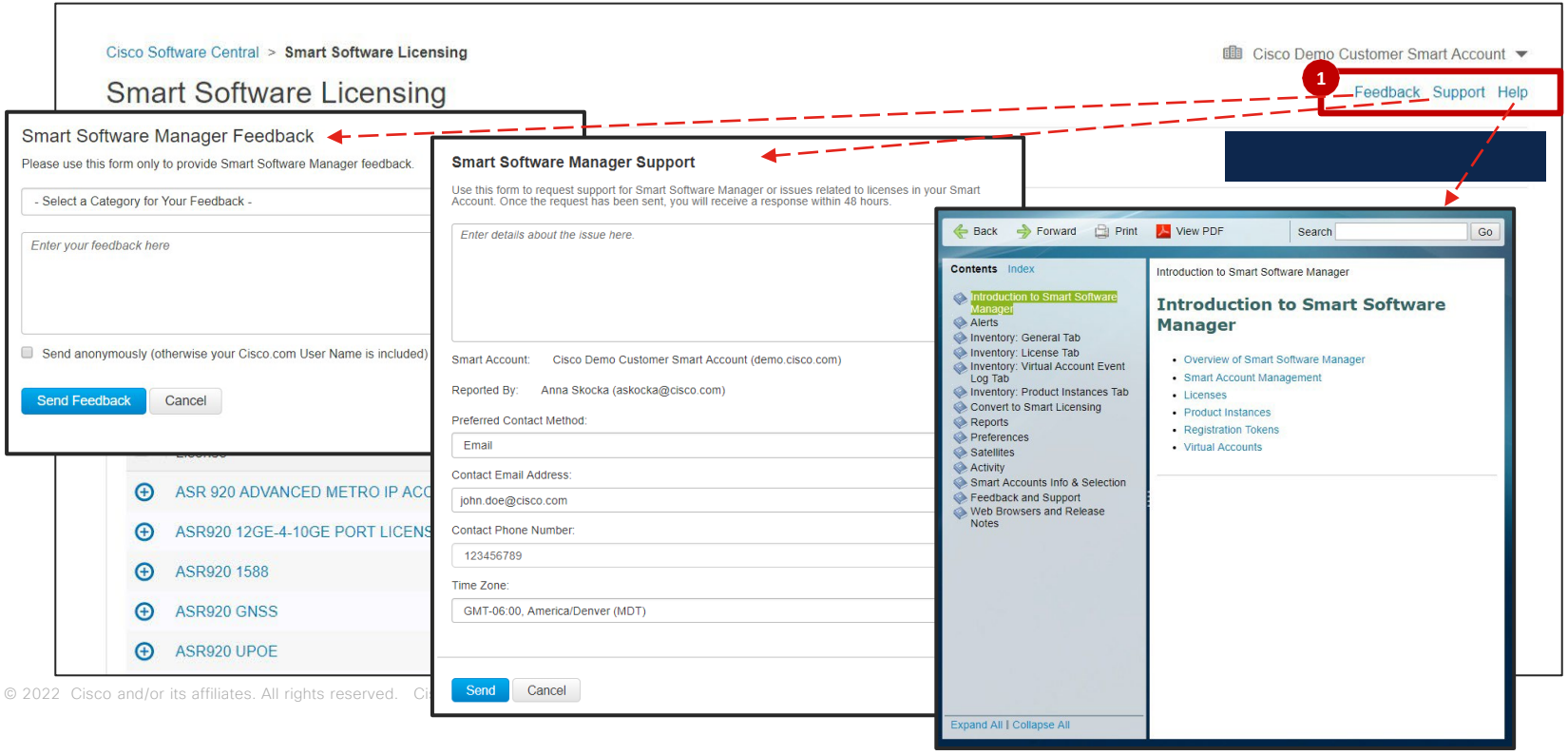
Feedback & Support

Additional Links

1. On all pages, there are links to provide feedback, raise a support case and for in tool help.



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Virtual Chat Assistant

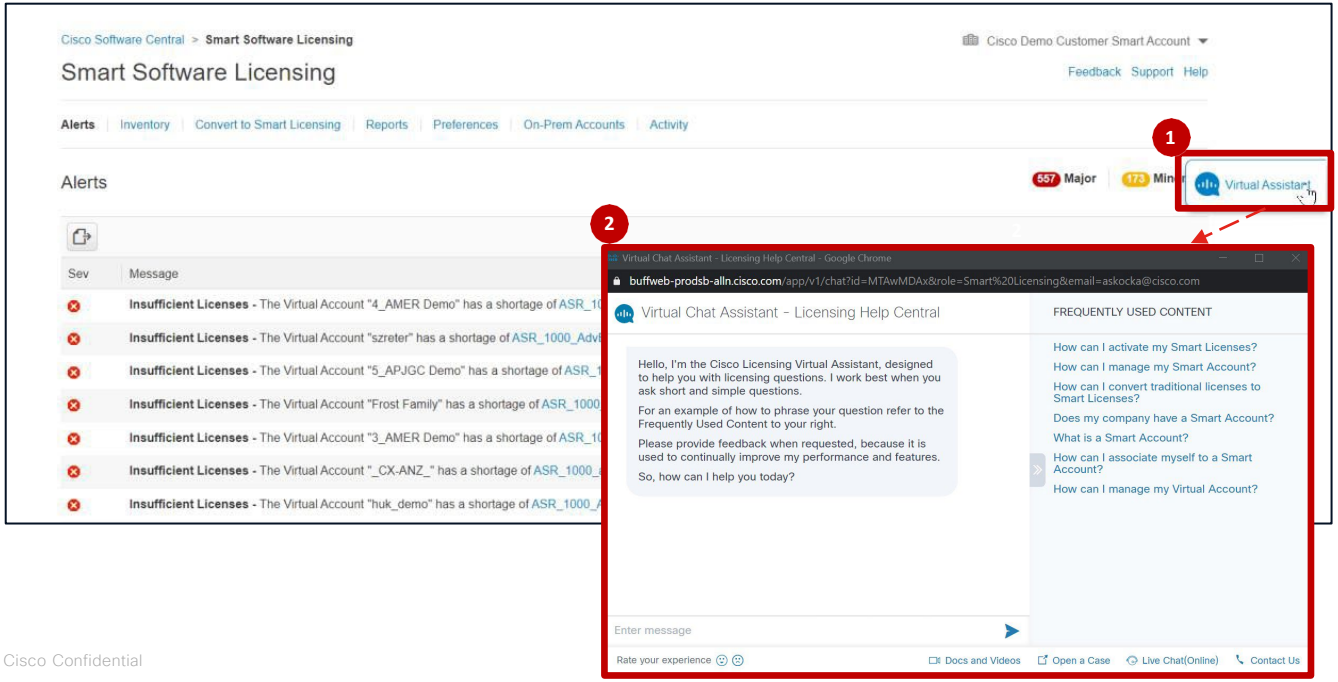
Virtual Assistant in SSM

For more details, check this QRG:
VCA Quick Reference Guide

You can now access the **Virtual Chat Assistant (VCA)** from Smart Software Manager.
The Virtual Chat Assistant will appear as a blue icon in the upper right-hand corner, in SSM.

1. Click the Virtual Assistant icon to open VCA..

2. The **Licensing Help Central** page appears and you can enter a message/type in your questions.



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Quiz Time

Quiz 3

Who can generate the inventory reports?

A. Only Smart Account Admin

B. Smart Account Admin and the virtual account admin

C. Smart Account Admin and Smart Account Approver

D. Only the virtual account admin

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Quiz 3 Answer

Who can generate the inventory reports?

A. *Only Smart Account Admin*

B. *Smart Account Admin and the virtual account admin*

C. *Smart Account Admin and Smart Account Approver*

D. *Only the virtual account admin*

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Classic to Smart License Conversion

1. Classic to Smart Conversion in Software Manager (CSSM)
   - Convert Classic license to Smart License
   - Automatic license conversion
   - Bulk conversion
   - Conversion settings

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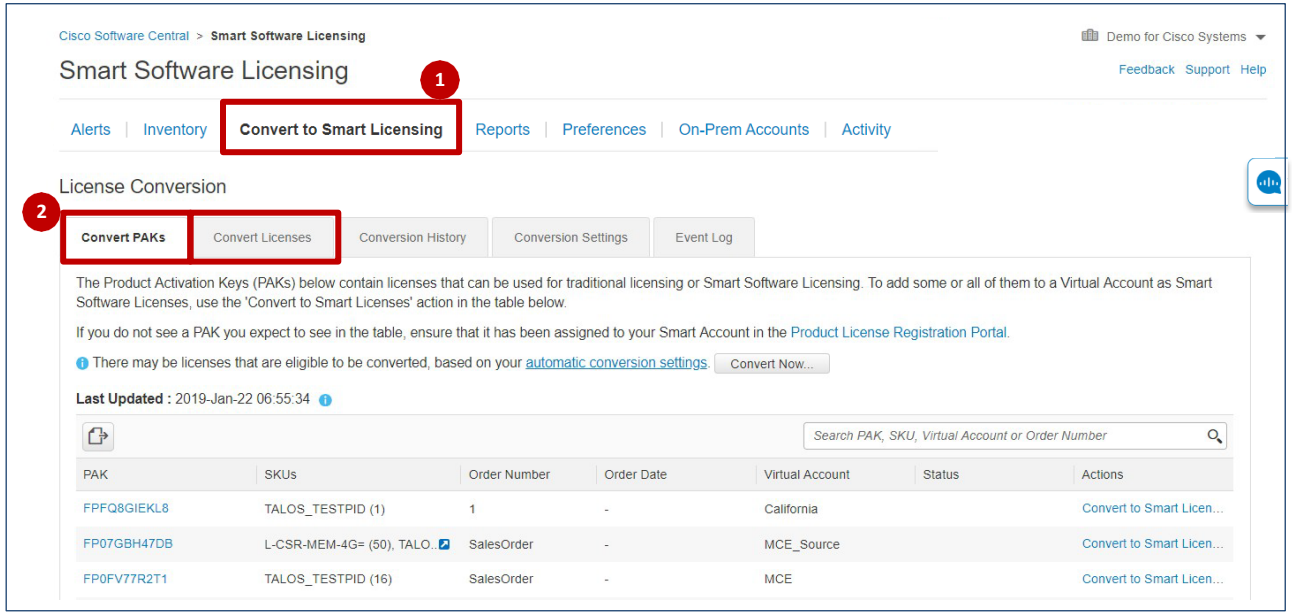
License Conversion

Convert traditional licenses currently in use to Smart Software Licenses

From the **Convert to Smart Licensing** tab, you can convert Classic Licenses to Smart Licenses and gain the valuable benefits of Smart Accounts. Two options are available:

1. **Convert PAKs to Smart Software Licenses**.

2. **Convert traditional Term & Content licenses** which are currently in use, **to Smart Software Licenses**.



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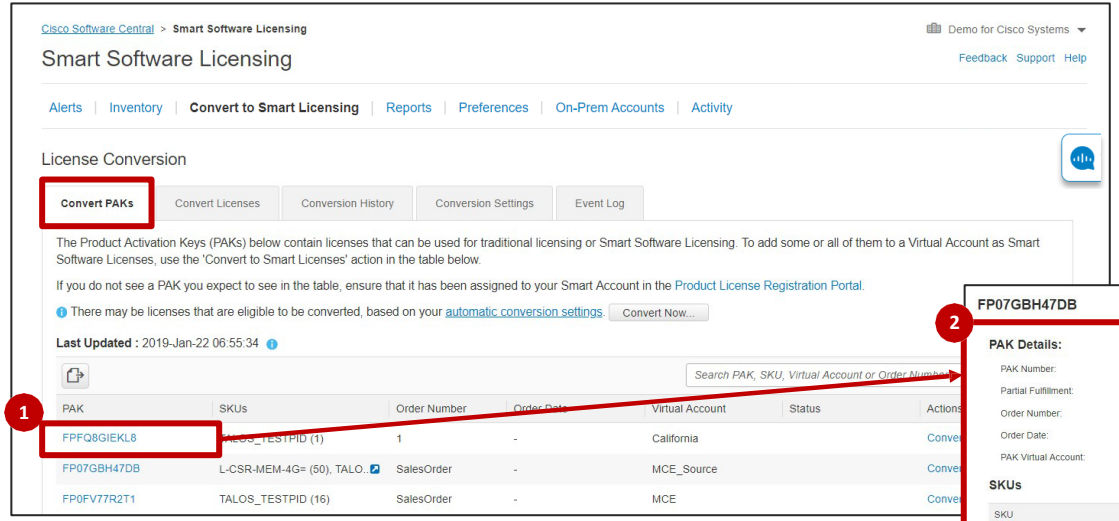
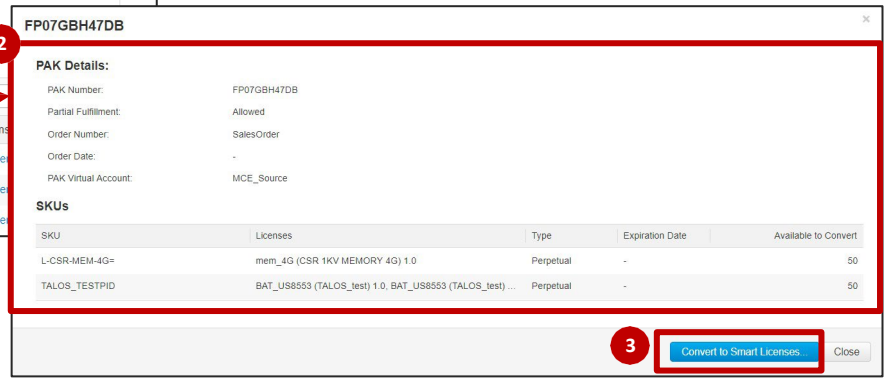
License Conversion

Convert PAKs to Smart Licenses

1. From **Convert PAKs** Tab in License Conversion section, **click on the PAK to view the PAK Details**.
2. In the **PAK Details**, SKUs and corresponding Smart equivalents will be displayed.
3. Click on **Convert to Smart Licenses**.





If a partial fulfillment is not allowed, you won't be able to choose which SKUs to convert.
If partial conversion is allowed, you can select the SKUs.

If a PAK gets updated in real time an informational icon will show up indicating the PAK update is latest and not according to the time stamp.

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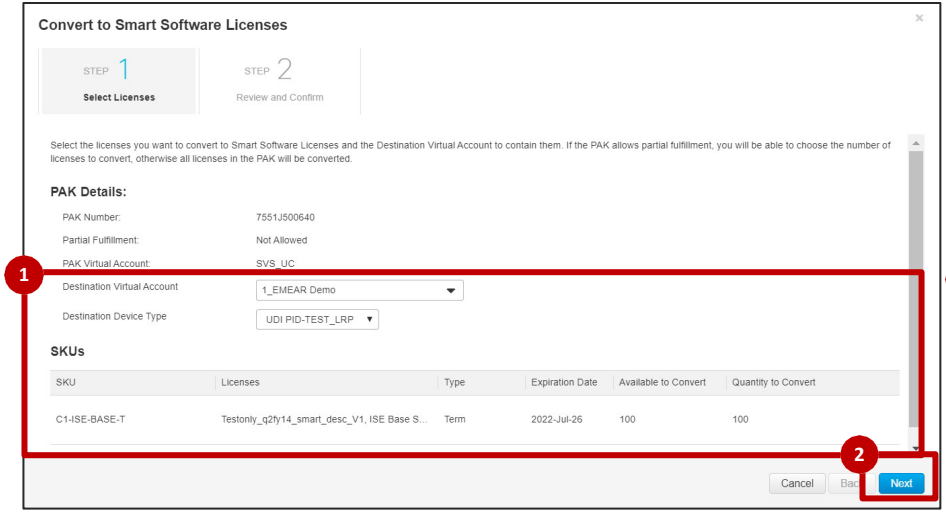
License Conversion

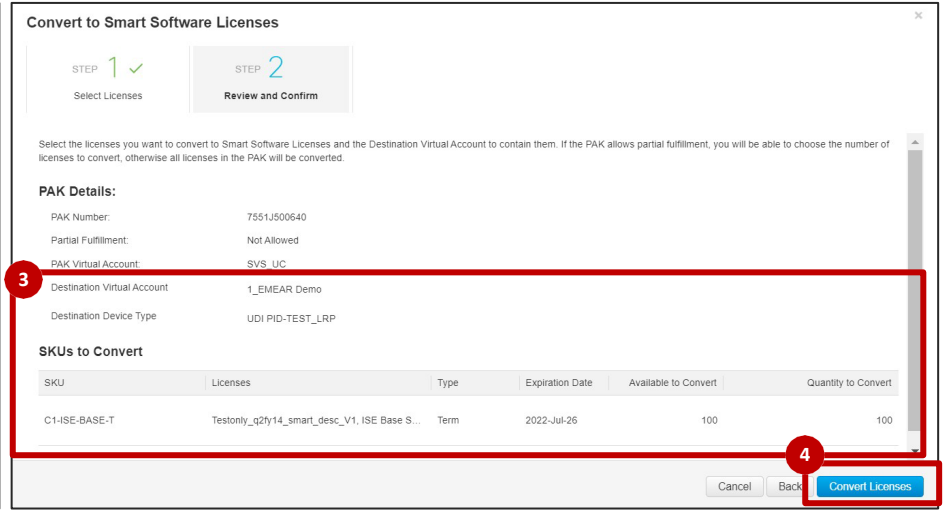
Convert PAKs to Smart Licenses

You need to select a Device Type in Step 1 only if there is a mapping between the License SKUs and the Device Type. If there is no mapping in the backend, the Destination Device Type drop-down will not appear in Step 1.

Upon clicking on **Convert to Smart Licenses**, the 2 step wizard opens.

1. In **Step 1**, **Select Licenses** and the **Quantity to Convert** (if the PAK allows partial fulfillment). Please specify the **Destination Virtual Account.** You may need to provide the **Destination Device Type**.
2. **Click on Next**.
3. In **Step 2,** Review and Confirm, double-check the SKUs to convert and **click on** 4 **Convert Licenses**.





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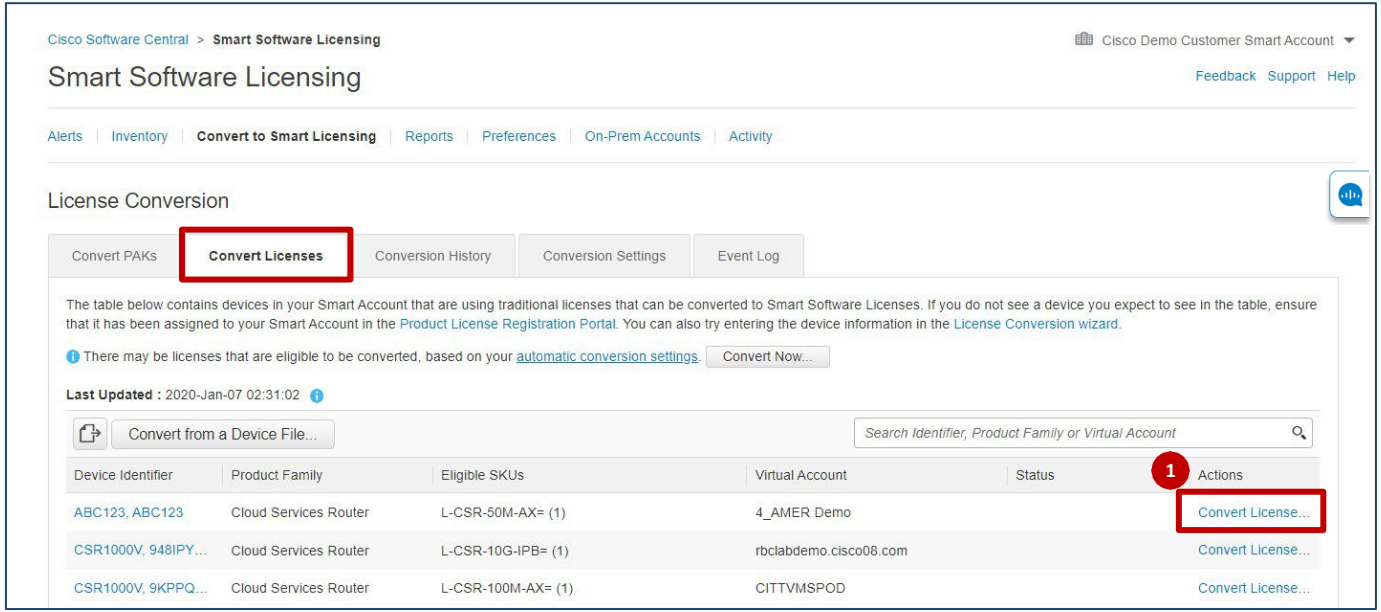
At the Review and Confirm stage you will see a warning message showing that once the licenses have been converted to Smart Licensing they will no longer appear in LRP.

License Conversion

Convert Classic Licenses to Smart Licenses

The **Convert Licenses** Tab contains devices in your Smart Account that are using traditional licenses and can be converted to Smart Software Licenses. If you do not see a device in the table, ensure that it has been assigned to your Smart Account in the License Registration Portal.

1. Click on **Convert Licenses**.



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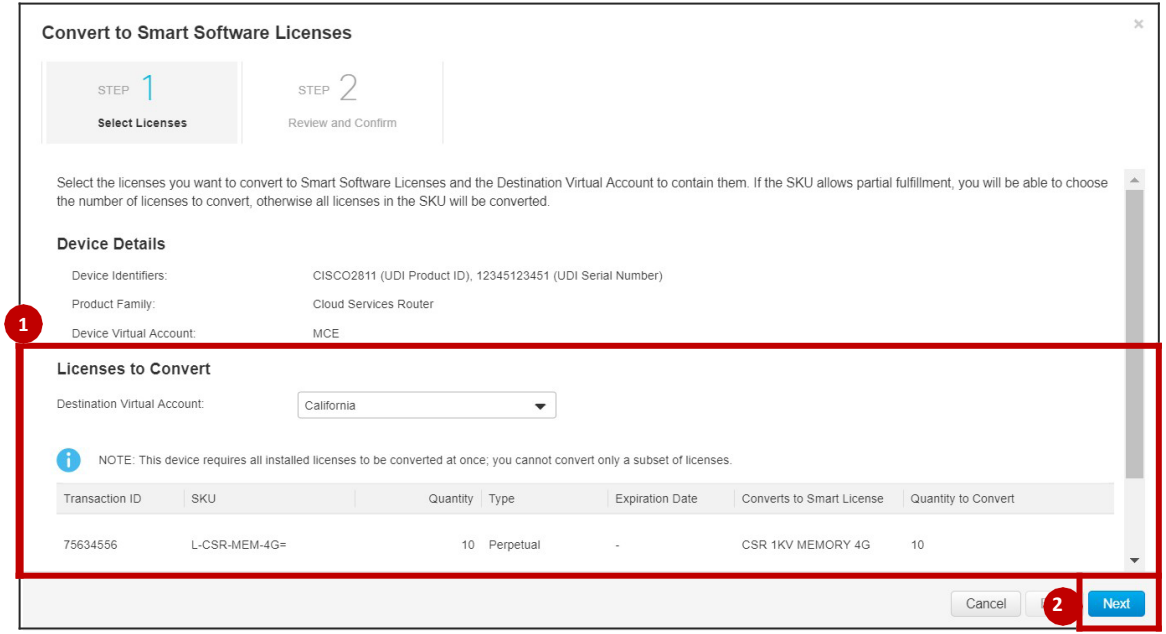
License Conversion

Convert Classic Licenses to Smart Licenses – Select Licenses

In **Step 1: Select Licenses**, you will see the License Key and the Product Family selected, as well as the Virtual Account the device is in.

1. Select the destination **Virtual Account** from the drop down, as well as the **License SKU** you would like to convert. *Only Virtual Accounts you have access to will be displayed.*
2. Click on **Next.**



If there is a mapping between the License SKUs and the Device Type, you will need to select a Device Type in Step 1. However, if there is no mapping in the backend, the Destination Device Type drop-down will not appear in Step 1.

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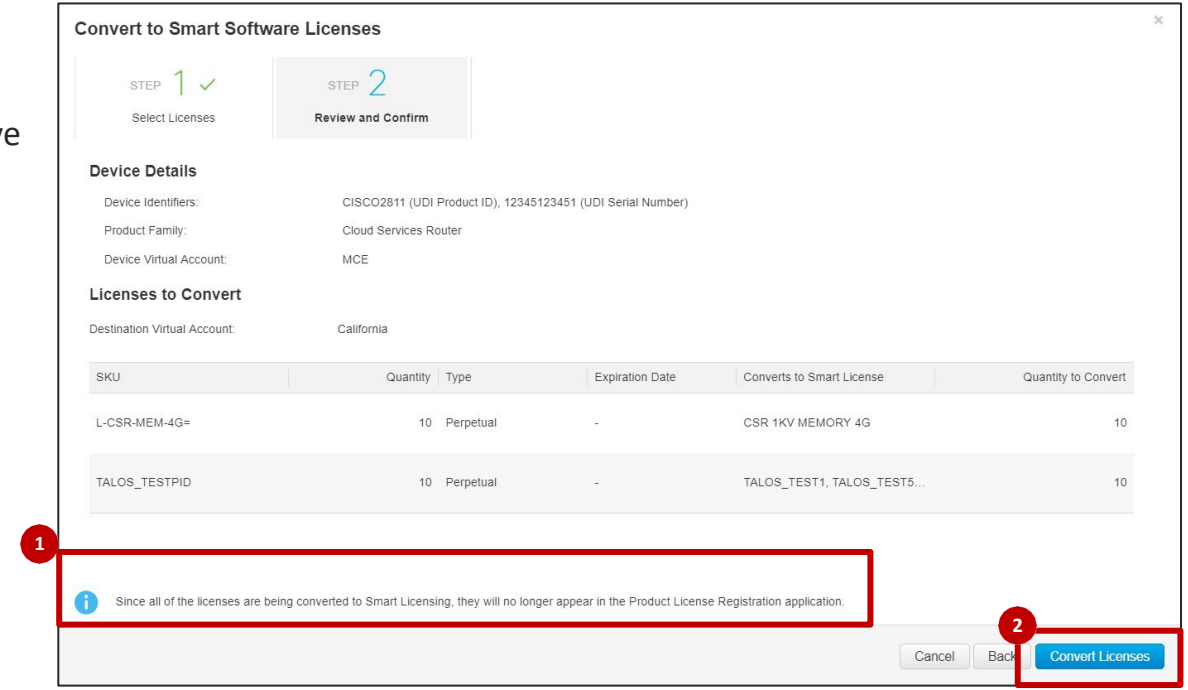
License Conversion

Convert Classic Licenses to Smart Licenses – Review and Confirm

1. In the second step, **Review and Confirm**, you will see a warning message that once the licenses have been converted to Smart Licensing, they will no longer appear in LRP.

2. Review your selections, and then confirm by clicking on **Convert Licenses**.



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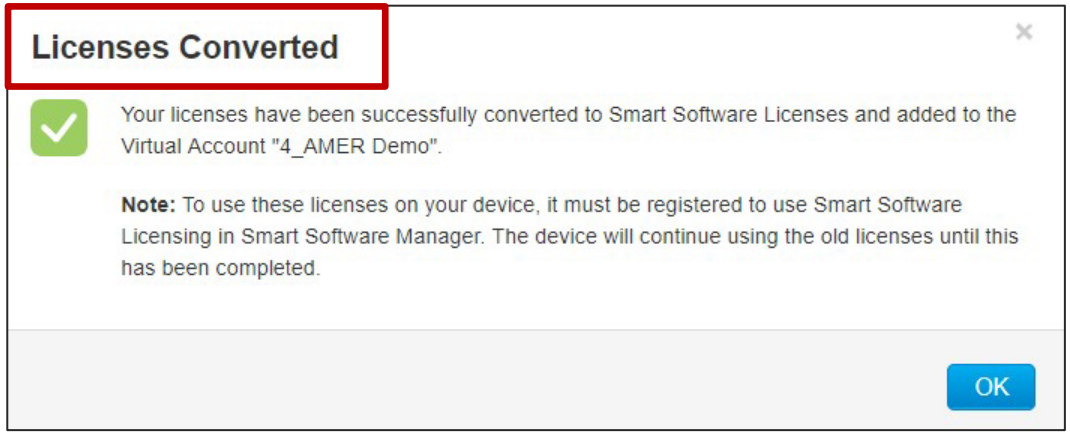
License Conversion

Convert Classic Licenses to Smart Licenses – Confirmation Message

You will receive a confirmation message showing that **your licenses have been successfully converted.**

In order to use these licenses on your device, it must be registered to use Smart Software Licensing in Smart Software Manager.



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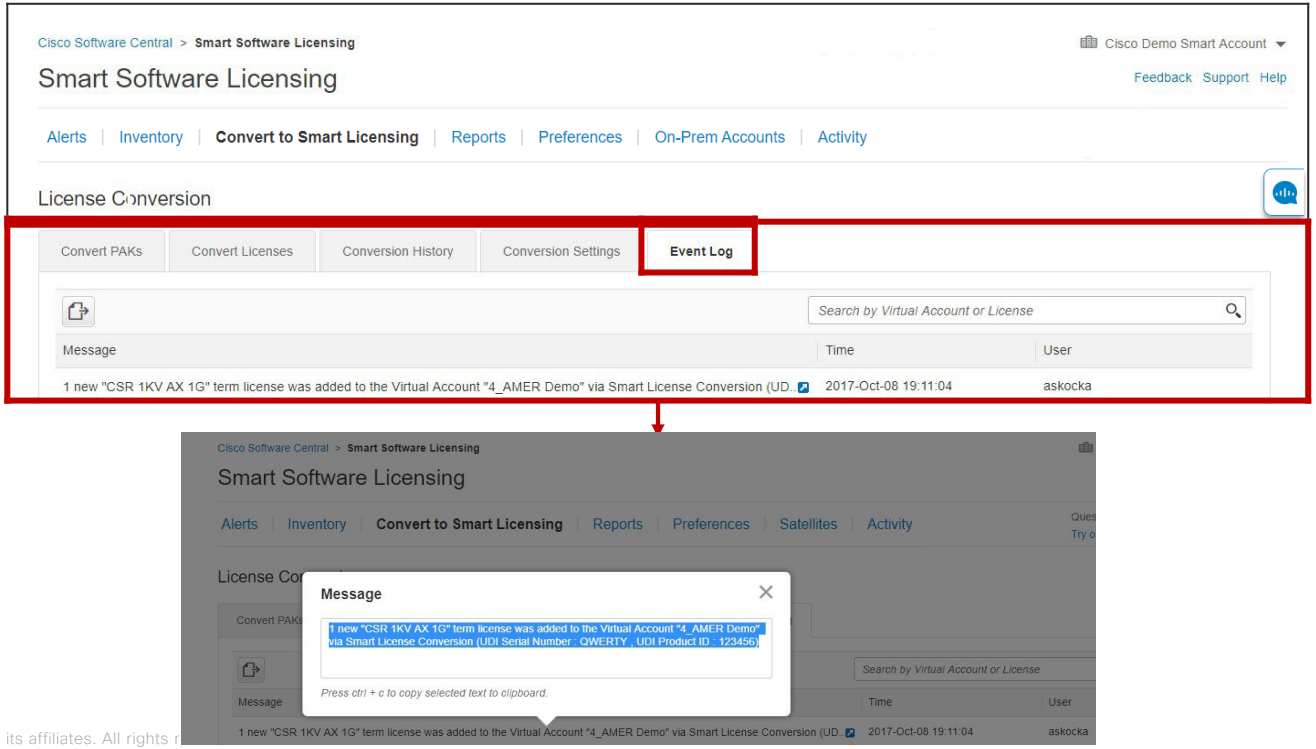
License Conversion

Event Log

1. In the **Event Log** tab, you can access the latest changes, including a message featuring change descriptions.



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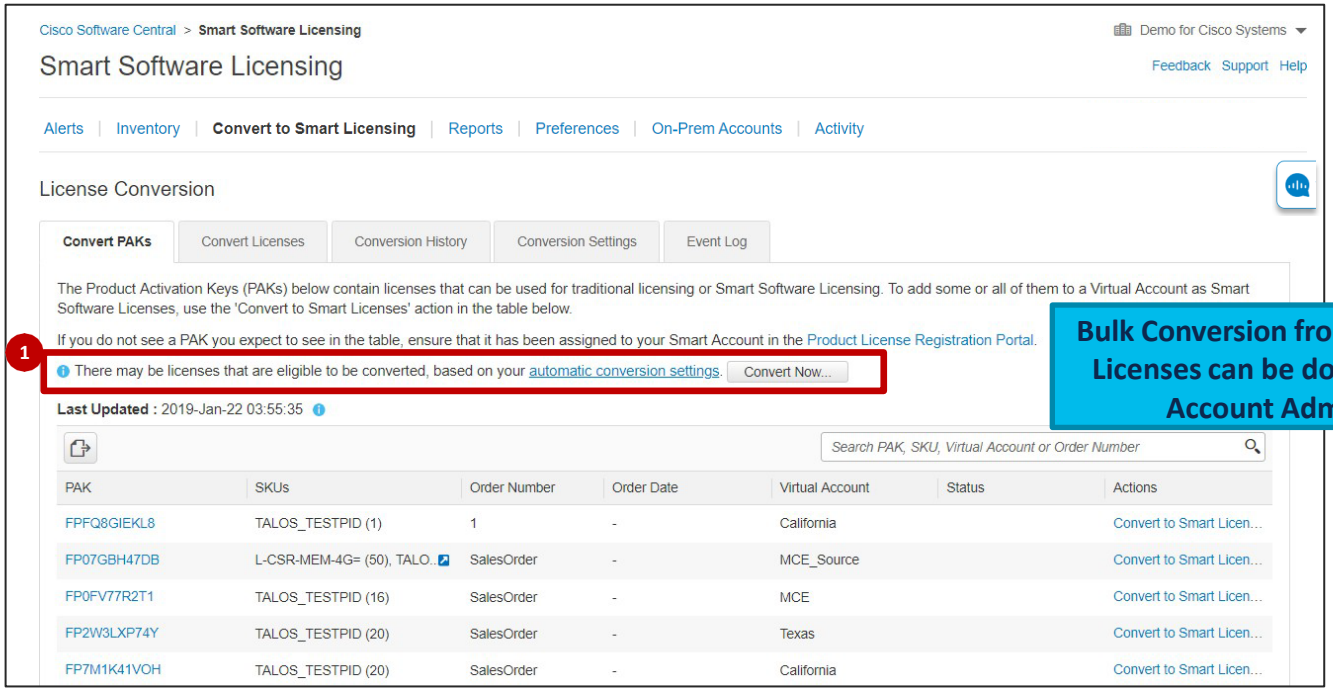
License Conversion

Convert Classic Licenses to Smart Licenses – Automatic and Bulk Conversion

1 You can now convert Hybrid SKUs from Classic to Smart Licenses in bulk (convert multiple licenses at once). You can also set up the automatic License Conversion of Hybrid SKUs to Smart Licenses.



Bulk Conversion from Classic to Smart Licenses can be done only by Smart Account Administrators.

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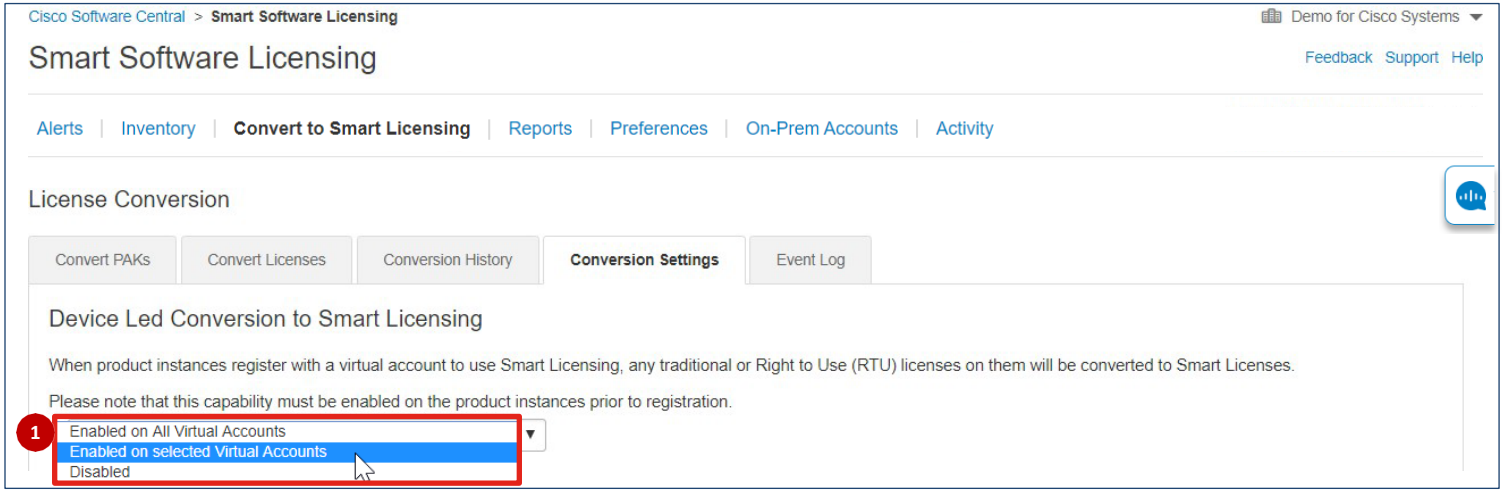
License Conversion

Convert Classic Licenses to Smart Licenses – Conversion Settings

In the **Conversion Settings** tab, the Smart Account Admin can add or modify License Conversion settings.

1. For **Device Led Conversion to Smart Licensing**, you can choose one of the 3 options:
   - **Enabled on all Virtual Accounts**
   - **Enabled on Selected Virtual Accounts**
   - **Disabled**

It is recommended to enable Automatic Device-Led Conversion on all Virtual Accounts



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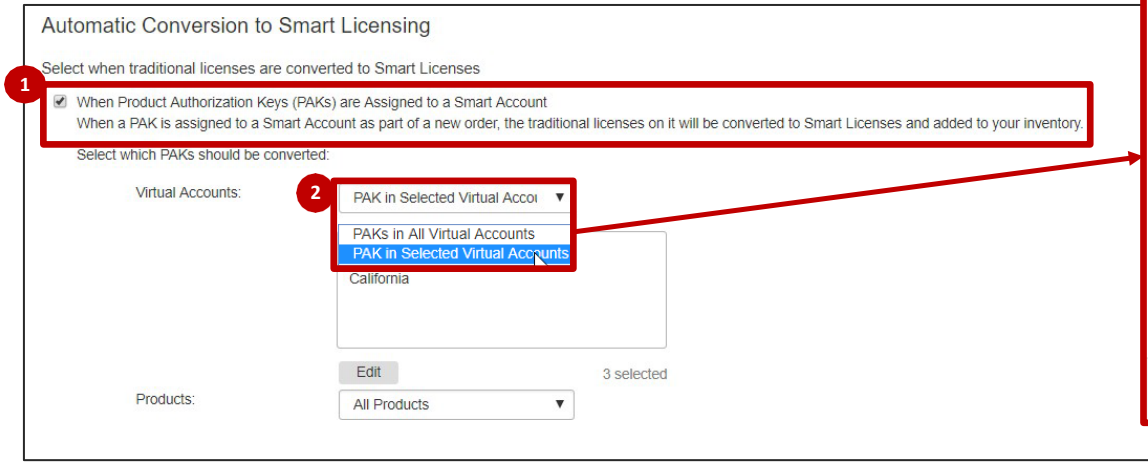
License Conversion

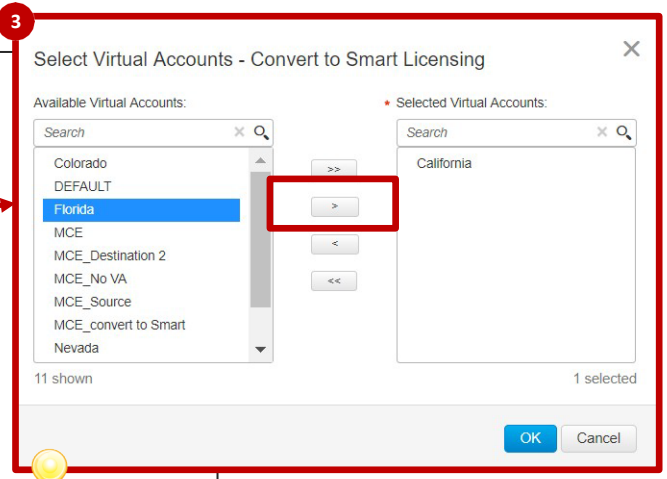
Convert Classic Licenses to Smart Licenses – Conversion Settings

In the **Conversion Settings** tab, the Smart Account Admin can 1 **enable Automatic Conversion to Smart Licensing** and decide which PAKs should be automatically converted to Smart Licenses when a PAK is assigned to a Smart Account as part of a new order.

2 You can choose either **PAKs in All Virtual Accounts** or **PAKs in Selected Virtual Accounts**.

3 If you choose **PAKs in Selected Virtual Accounts**, you need to select the Virtual Account(s) from the dialog box: select and move to the right-hand side using the arrows.





It is recommended to enable Automatic Conversion to Smart Licensing on all Virtual Accounts and for all Products.

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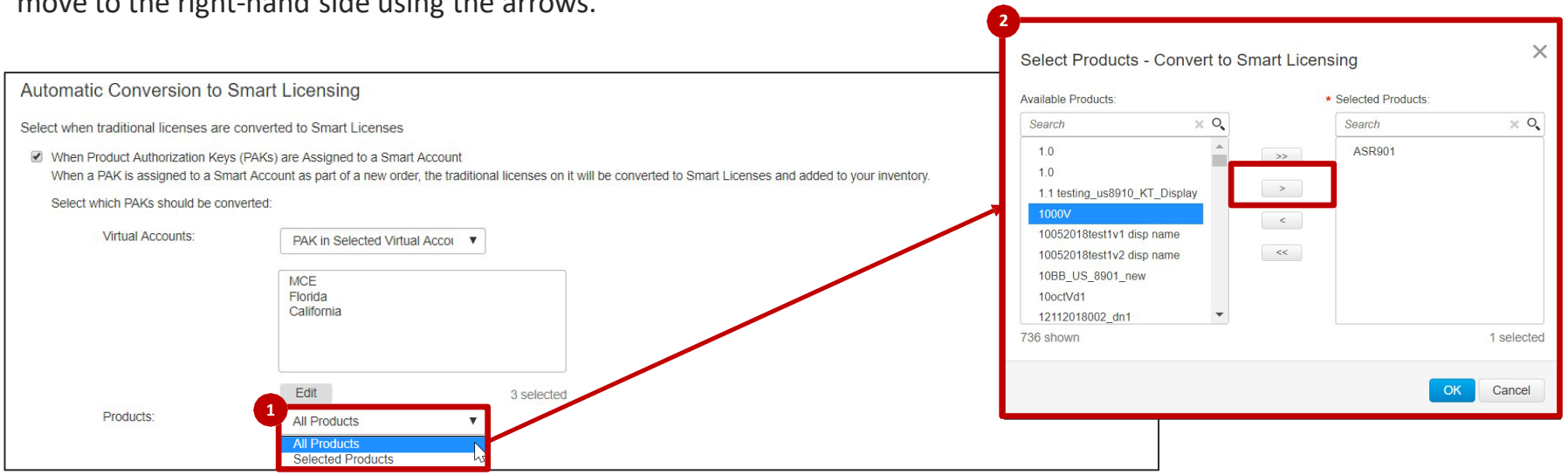
License Conversion

Convert Classic Licenses to Smart Licenses – Conversion Settings

1. In the **Conversion Settings** tab, you can choose to automatically convert PAKs for **All Products** or for **Selected Products**.
2. If you choose **Selected Products**, you need to select one or more Available Products from the dialog box: select and move to the right-hand side using the arrows.



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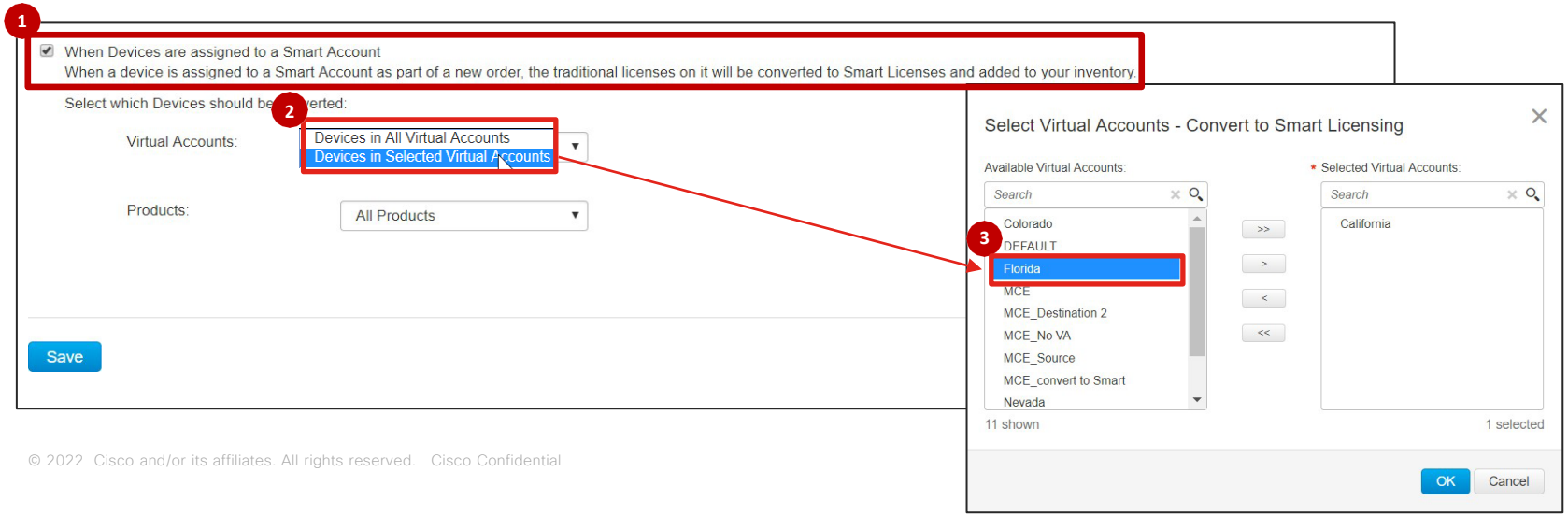
License Conversion

Convert Classic Licenses to Smart Licenses – Conversion Settings

In the **Conversion Settings** tab, the Smart Account Admin can 1 **enable Automatic Conversion to Smart Licensing** and **decide which Licenses on a Device** should be automatically converted to Smart Licenses when a Device is assigned to a Smart Account as part of a new order.

2 You can choose either **Devices in All Virtual Accounts** or **Devices in Selected Virtual Accounts**.

3 If you choose **Devices in Selected Virtual Accounts**, you need to select the Virtual Account(s) from the dialog box: select and move to the right-hand side using the arrows.



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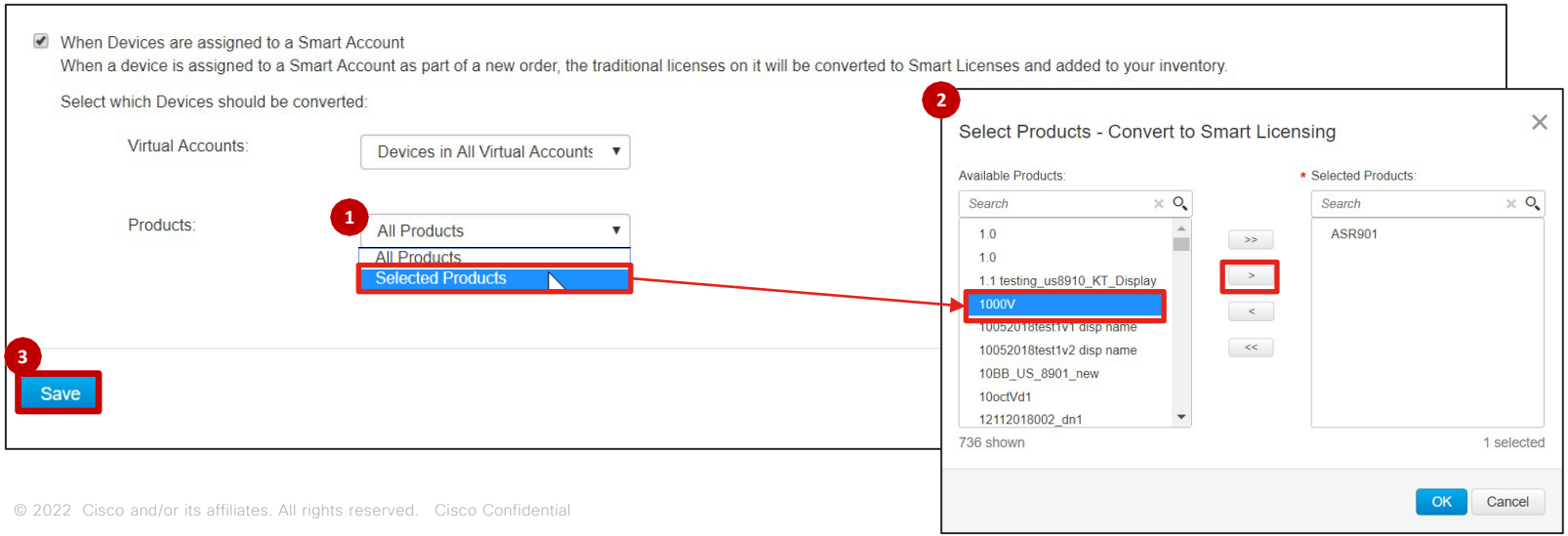
License Conversion

Convert Traditional Licenses to Smart Licenses – Conversion Settings

1. In the **Conversion Settings** tab, you can choose to automatically convert **Licenses on Devices** for **All Products** or for **Selected Products**.
2. If you choose **Selected Products**, you need to select one or more Available Products from the dialog box: select and move to the right-hand side using the arrows.
3. After changing any of the Conversion Settings, you need to **click Save**.



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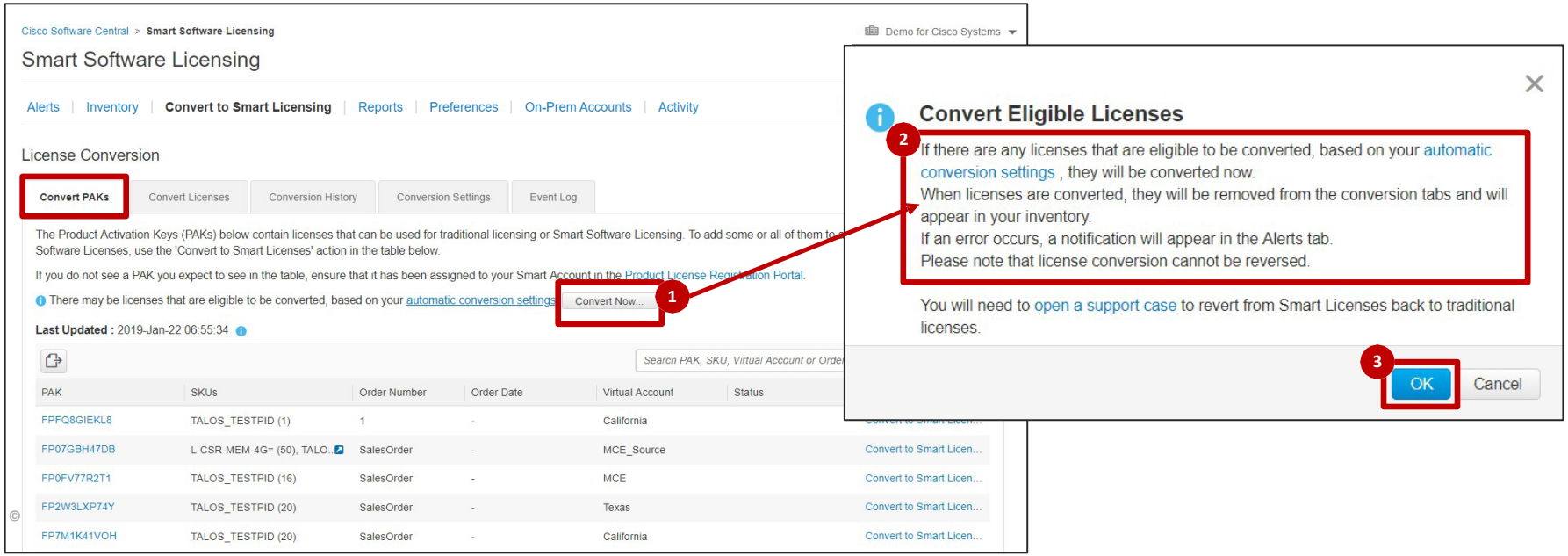
License Conversion

Convert Classic Licenses to Smart Licenses

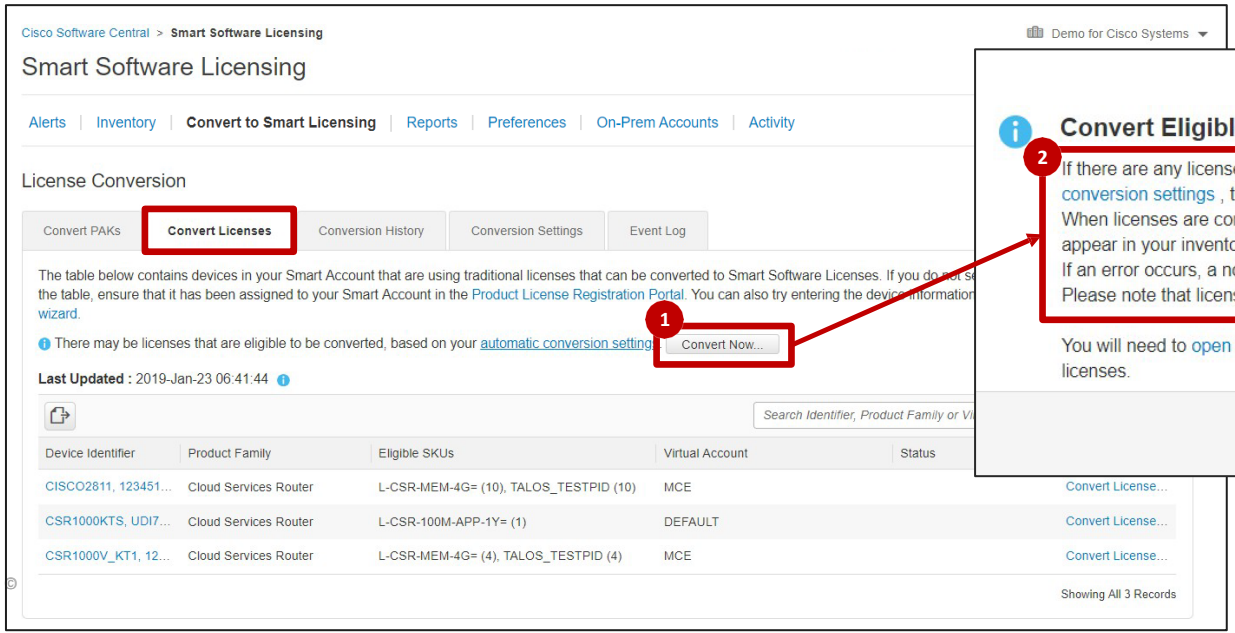
1. In the **Convert PAKs tab**, the Smart Account Admin can **Convert PAKs to Smart Licenses in bulk**. Click on **Convert Now**.
2. In the dialog box, you are informed that eligible Licenses will be converted to Smart Licenses based on your automatic conversion settings.
3. Click **OK**. When converted, the Licenses will appear in your **Inventory** tab.



License Conversion

Convert Classic Licenses to Smart Licenses

1. The Smart Account Admin can **Convert PAKs to Smart Licenses in bulk** also in the **Convert Licenses tab**.
   Click on **Convert Now**.
2. In the dialog box, you are informed that eligible Licenses will be converted to Smart Licenses based on your automatic conversion settings.
3. Click **OK**. When converted, the Licenses will appear in your **Inventory** tab.



Key Takeaways

Benefits of Smart License

1) Complete view
2) Easy Registration
3) Company-specific
4) Unlocked

Classic to Smart License Conversion

There are multiple ways the Account Admin can convert the Classic license to Smart: Either in LRP or CSSM.

Smart Licensing Features

The alerts and preference settings are for your convenience to manage Smart Licenses easily.

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Quiz Time

Quiz 4

There are some ways to convert Classic license to Smart License.

A. *The user with the admin role can convert to Smart License only in License Registration portal (LRP).*

B. *The user with the admin role can convert to Smart License only in Software Manager (CSSM).*

C. *The user with the admin role can convert to Smart License both in LRP and CSSM.*

D. *The user with the admin role can convert to Smart License neither in LRP or CSSM.*

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Quiz 4 Answer

There are some ways to convert Classic license to Smart License.

A. *The user with the admin role can convert to Smart License only in License Registration portal (LRP).*

B. *The user with the admin role can convert to Smart License only in Software Manager (CSSM).*

C. *The user with the admin role can convert to Smart License both in LRP and CSSM.*

D. *The user with the admin role can convert to Smart License neither in LRP or CSSM.*

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More resources about Smart Licensing

VOD: Classic license assignment to Smart Account/virtual account

- Unfulfilled PAK to be assigned to Smart Account in LRP

Guide: Virtual Account Custom Tagging

Guide: User Groups in Smart Account Management

- Create a user group
- Send message to user group members
- Assign and export user group

VOD: Introduction to CSSM On-Prem

- How it works
- On-Prem benefits
- On-Prem deployment modes

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Smart Account Basics & Management	1. What is Smart Account? 2. How to manage Smart Accounts • Property • Virtual Accounts • Users
License Management	1. Reports 2. Preferences 3. On-Prem accounts 4. Alerts 5. Move licenses between SAs & Virtual Accounts 6. Smart Licensing vs traditional licensing 7. Convert traditional licenses into Smart Licenses
Smart Licensing Deployment Methods	• Smart Licensing when direct access to the Cisco cloud is not allowed. • Smart Software Manager On-prem “Satellite” Specific License Reservation (SLR) and Permanent LR (PLR) • Smart Licensing Using Policy

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Smart Licensing Deployment Methods

1. Direct Cloud Access
   - Direct cloud access
   - Direct cloud access through an HTTP proxy

2. On-Prem (Satellite)
   - Connected On-Prem access
   - Disconnected On-Prem access

3. Full Offline Access
   - Specific License Reservation (SLR)
   - Permanent License Reservation (PLR)

4. Smart Licensing Using Policy (SLUP)

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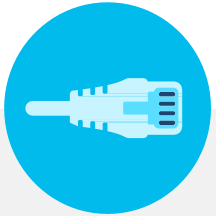
Smart Licensing Deployment Options



Direct

- Cisco product sends usage information directly over the internet. No additional components are needed.

On-Prem

- Cisco products send usage information to a locally installed on-prem server or Cisco Smart Licensing Utiliity (CSLU).
- Periodically, exchange information with Cisco to keep on-prem server sync .
- Periodic sync between CSLU with Cisco will make sure consumption data is right reflected in Cisco.
- CSLU will be available as light weight stand alone or as an integration solution with other controllers.
- This synchronization can occur automatically in connected environments or manually in disconnected environments.

Offline
(not recommended)

- Use copy/paste information between product and Cisco.com to manually check in and out licenses.
- Functionally equivalent to current node locking, but with Smart License tracking.

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Methods for Securely Communicating with Cisco

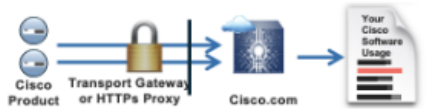
Ease of use

Security Policy

Options

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

❷ **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).



❸ **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.

❹ **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.

❺ **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.

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New Deployment Method for Smart Licensing

Smart Licensing Using Policy (SLUP)

- This Smart Licensing Using Policy removes Day 0 friction by eliminating the evaluation mode that requires registration before use, enabling immediate value for Cisco customers. This new way of deployment gives customers the flexibility to submit license usage reports per the reporting policy installed on their devices.
- The new deployment method for Smart Licensing simplifies the way end customers activate and manage their licenses. This allows customers to have an easier, faster, and more consistent way to purchase, renew, or upgrade their licenses. In addition:
    - No evaluation mode at product boot, and no registration is required in cisco.com
    - There is no on-going communication with Cisco DNA Cloud, per device
    - Reporting of software use is required
    - There is no network deployment operating expense
- For more Information – Visit here.

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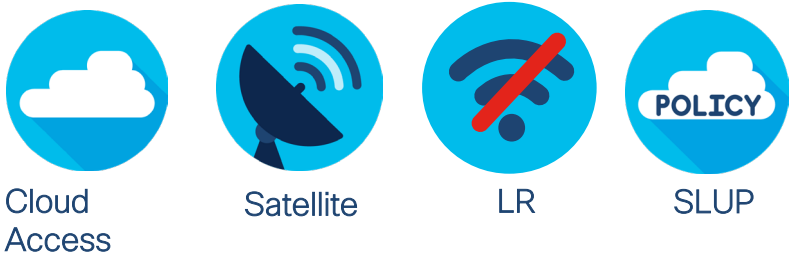
Key Takeaways



Smart License Deployment Methods

1) Stay with the default Direct Cloud Access for ease of the use.
2) On-Prem and License Reservation methods are available depending on the connectivity environment.

New Development Method: Smart License Using Policy

1) The simplified day-0 operations for customers.
2) Reporting is required.

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Quiz Time

Quiz 5

Smart Licensing Using Policy is …

A. *No evaluation mode at product boot, and no registration is required in cisco.com*

B. *Evaluation mode at product boot, and registration is required*

C. *Neither of A or B.*

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Quiz 5 Answer

Smart Licensing Using Policy is …

A. No evaluation mode at product boot, and no registration is required in cisco.com

B. Evaluation mode at product boot, and registration is required

C. Neither of A or B.

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Customer Support

- Opening a support case -

Software Licensing Support:
If you have support questions about Software Licensing, open a case via **Support Case Manager (SCM)**.

www.cisco.com/go/scm

Product Support:

Technical Assistance Center (TAC)

For Technical Support questions, please contact Cisco TAC:

Worldwide Support Contacts

More resources about Smart Licensing Deployment Methods

Guide: Smart Licensing SLR
- Overview
- How it works

FAQ: Smart Licensing using policy
- New development method

Guide: Case Management for Licensing Support

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Questions?

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Upcoming Webinars on Partner Operations

Get Smart with Smart Account	Global session: Wednesday, July 13th, 2022, at 8 am (San Francisco time PDT) Wednesday, July 13th, 2022, at 5 pm (Summertime, Berlin GMT+2) Wednesday, July 13th, 2022, at 11 pm (Singapore time, GMT+8)
August Operational Readiness Webinars	AMER/EMEA session: Thursday, August 4, 2022 (at 8 am, San Francisco time PDT) Thursday, August 4, 2022 (at 5 pm, Summertime, Berlin GMT+2)

Visit our Live Event page!

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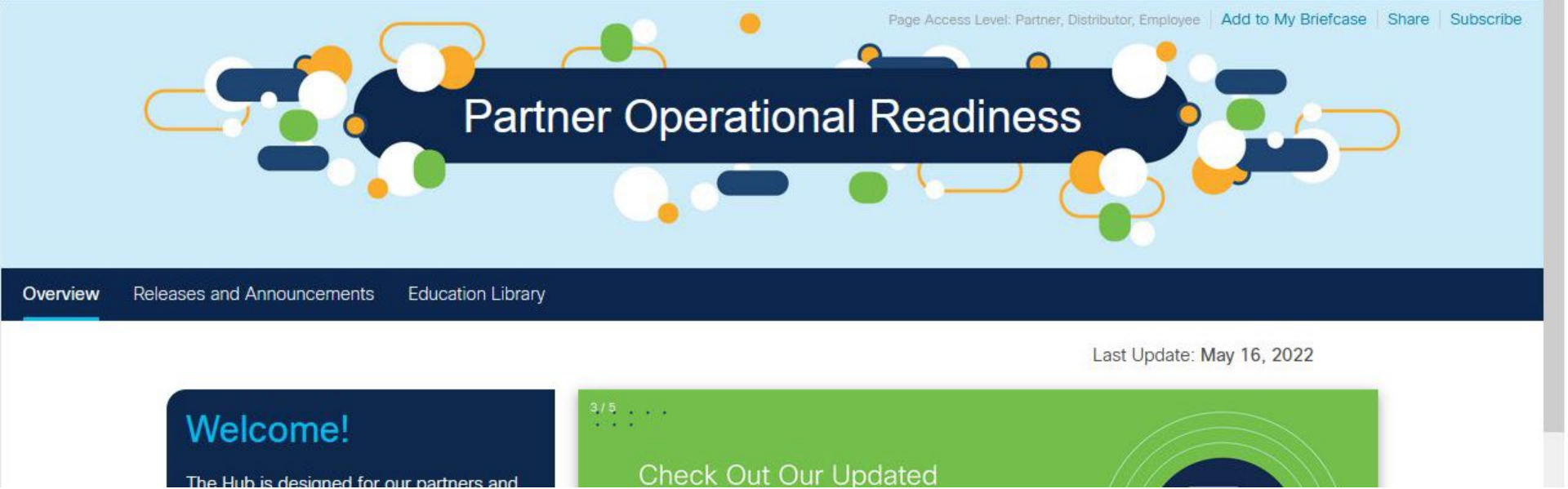

Visit [Partner Operational Readiness Hub page]() for more resources!

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