



How to Add New Users to a Smart Account

Quick Reference Guide for Partners & Customers

How to Add New Users to a Smart Account

Introduction

- ✔ A **Customer Smart Account** provides the repository for Smart enabled products and enables Users to manage Cisco Software Licenses.
- ✔ Smart Account Administrators can add new Users to a Smart Account.
- ✔ Virtual Account Administrators can add new Users to their assigned Virtual Accounts.
- ✔ In order to add a new User to a Smart Account, login to [Cisco Software Central](#) with your Cisco User ID.

How to Add New Users to a Smart Account

Manage Smart Accounts

- 1 From [Cisco Software Central](#), go to the **Administration** section and click on **Manage Smart Account**.

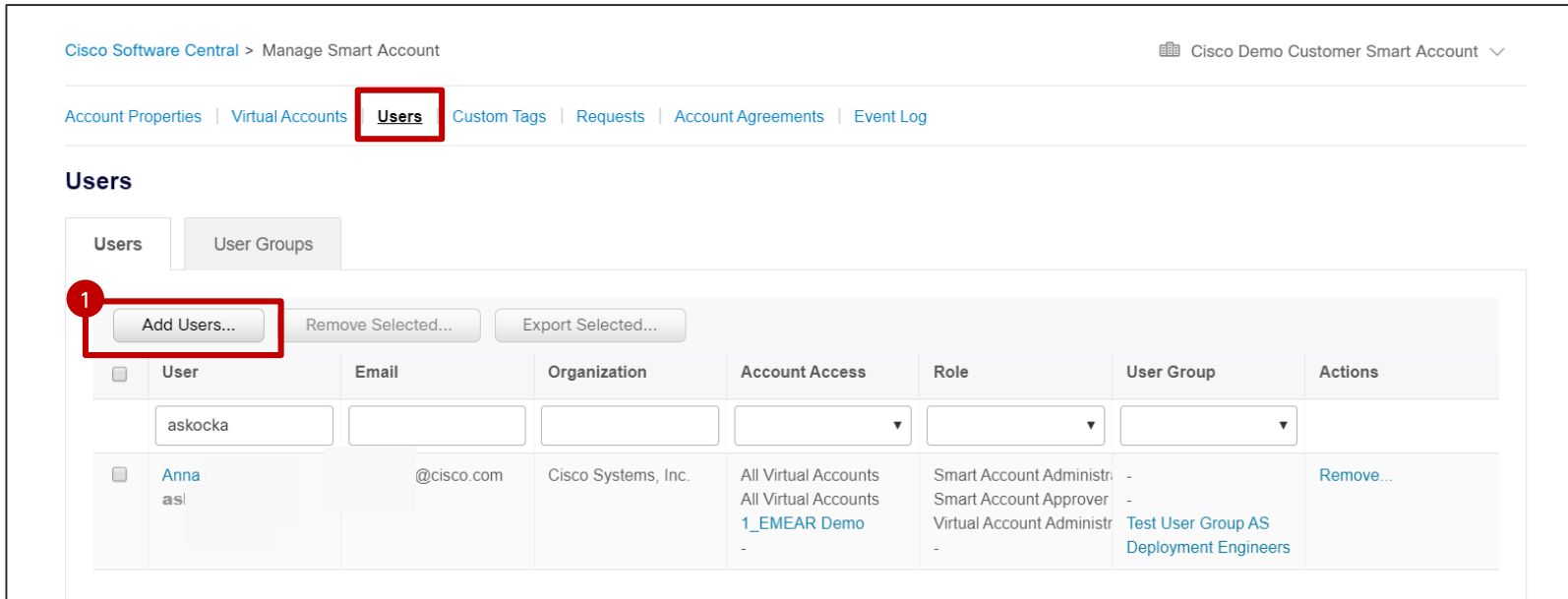
The screenshot displays the Cisco Software Central web interface. The top navigation bar includes the Cisco logo, a search icon, and language selection options (AS and US/EN). The left sidebar contains a navigation menu with the following items: Cisco Software Central, Products & Services, Support & Download, Training & Event, Buy, and Partners. The 'Administration' item is highlighted with a red box. A red arrow points from the 'Administration' item to the 'Manage Smart Account' option in the main content area. The 'Manage Smart Account' option is also highlighted with a red box and a red circle with the number '1'. The main content area is titled 'SMART ACCOUNT MANAGEMENT' and contains the following options: 'Request a Smart Account' (Get a Smart Account for your organization or initiate it for someone else), 'Manage Smart Account' (Modify the properties of your Smart Accounts and associate individual Cisco Accounts with Smart Accounts), 'Request Access to an Existing Smart Account' (Submit a request for access to a Smart Account), and 'Learn about Smart Accounts' (Access documentation and training). The 'TRAINING' section is also visible at the bottom of the main content area.

How to Add New Users to a Smart Account

Add Users

In the **Users** tab, all users associated with the Smart Account are displayed.

- 1 Upon selecting **Users** you will be able to see a list of users and an option to **Add Users**.



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

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

Users

Users | User Groups

1 **Add Users...** | Remove Selected... | Export Selected...

<input type="checkbox"/>	User	Email	Organization	Account Access	Role	User Group	Actions
<input type="checkbox"/>	askocka						
<input type="checkbox"/>	Anna asi	@cisco.com	Cisco Systems, Inc.	All Virtual Accounts All Virtual Accounts 1_EMEAR Demo -	Smart Account Administr Smart Account Approver Virtual Account Administr -	- - Test User Group AS Deployment Engineers	Remove...

How to Add New Users to a Smart Account

Add Users

- 1 In **Step 1, Select Users**, you can add one or more New Users manually by entering their email addresses or Cisco User IDs.
- 2 Click on **Add**.
- 1a You can also **import new Users from a CSV file**. Click on **Upload Users** to import a CSV file.

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

Add Users

STEP 1
Select Users

STEP 2
Assign Accounts

Select Users

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

Method:

Users to Add:

User	Email Address	Organization
------	---------------	--------------

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

Add Users

STEP 1
Select Users

STEP 2
Assign Accounts

STEP 3
Review

Select Users

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

Method:

User	Email Address	Organization	Actions
------	---------------	--------------	---------

How to Add New Users to a Smart Account

Add Users

- After entering the email ID or Cisco.com ID of the new Smart Account User(s), click on **Add**. The system verifies whether a profile has been set up for them or not.
- If there is a match, the User details will be automatically populated below, including **User, Email Address, Organization**.
- Select **Next** to proceed.

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

Add Users

STEP 1 Select Users | STEP 2 Assign Accounts | STEP 3 Review

Select Users

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

Method: Add Users Manually

Users to Add: Cisco user ID's or email addresses, comma separated **Add**

User	Email Address	Organization	Actions
test testtest	contro_1@hotmail.com	CISCO SYSTEMS LLC	Remove...

1 User

Cancel **Next**

How to Add New Users to a Smart Account

Add Users – Assign Accounts

- 1a You are redirected to **Step 2: Assign Accounts**. Here you can choose if the new User will have access to the **Entire Smart Account** or to **Selected Virtual Accounts**.
- 2a If you choose **Entire Smart Account**, you can assign one of the three Smart Account Roles: **Smart Account Administrator**, **Smart Account Approver**, **Smart Account User**.

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

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

Add Users

STEP 1 ✓ **Select Users** | STEP 2 **Assign Accounts** | STEP 3 **Review**


Assign Accounts to the Users

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

Scope of Access: Entire Smart Account Selected Virtual Accounts

User Role: ▾

Cancel **Smart Account Administrator**
Smart Account Approver
Smart Account User

 A Smart Account Approver role can only be assigned to a User whose primary Email ID Domain matches the Smart Account's Domain ID.

How to Add New Users to a Smart Account

Add Users – Assign Accounts

- 3a Click on Next to confirm the Assigned Smart Account role.

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

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

Add Users

STEP 1 ✓

Select Users

STEP 2

Assign Accounts

STEP 3

Review

Assign Accounts to the Users

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

Scope of Access: Entire Smart Account Selected Virtual Accounts

User Role:

3a

How to Add New Users to a Smart Account

Add Users – Assign Accounts

- 1b If you choose Selected Virtual Accounts, 2b you can assign one of the two Virtual Account Roles: Virtual Account Administrator or Virtual Account User.

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

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

Add Users

STEP 1 ✓
Select Users

STEP 2
Assign Accounts

STEP 3
Review

Assign Accounts to the Users

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

1b Scope of Access: Entire Smart Account Selected Virtual Accounts

2b User Role:
Available Virtual Accounts:

Assigned Virtual Accounts:

How to Add New Users to a Smart Account

Add Users – Assign Accounts

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

Add Users

STEP 1 ✓ Select Users

STEP 2 Assign Accounts

STEP 3

Assign Accounts to the Users

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

Scope of: Entire Smart Account Selected Virtual Accounts

Access: Entire Smart Account Selected Virtual Accounts

User Role: Virtual Account Administrator

Available Virtual Accounts:

By Name | By Tag

EMEAR

Virtual Account	Description
<input checked="" type="checkbox"/> 1_EMEAR Demo	1_EMEAR Demo
<input checked="" type="checkbox"/> 2_EMEAR Demo	2_EMEAR Demo
<input type="checkbox"/> EMEAR_hubertg	Virtual account for traini

Assigned Virtual Accounts:

By Name | By Tag

Search

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

Assign Account and Children

Assign Account Only

Unassign Selected

Unassign All

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

How to Add New Users to a Smart Account

Add Users – Assign Accounts

7b Click on Next to confirm the assigned Virtual Account roles.

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

Add Users

STEP 1 ✓
Select Users

STEP 2
Assign Accounts

STEP 3
Review

Assign Accounts to the Users

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

Scope of Access: Entire Smart Account Selected Virtual Accounts

User Role:

Available Virtual Accounts:

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

Assigned Virtual Accounts:

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

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

Buttons: Cancel, Back, Next

How to Add New Users to a Smart Account

Review

- 1 In **Step 3: Review**, the user information and Account Access (proposed role assignment) is displayed for a final review.
- 2 If the information listed is correct, select **Add Users** to complete the process.

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

Add Users

STEP 1 ✓
Select Users

STEP 2 ✓
Assign Accounts

STEP 3
Review

Review

Users		
User	Email Address	Organization
<input type="text"/>	<input type="text"/>	<input type="text"/>
test testtest test	contro_1@hotmail.com	CISCO SYSTEMS LLC

1 User

Account Access		
Account	Scope	Assignment Source
<input type="text"/>	<input type="text"/>	<input type="text"/>
All Virtual Accounts		Smart Account Administrator

1 Assignment

Cancel Back **Add Users**

How to Add New Users to a Smart Account

New Smart Account Users

- 1 The new Smart Account User will receive an email confirmation regarding their new role.
- 2 They will also be listed in the primary **Users** tab.

1

From: CiscoAccountServices@cisco.com <CiscoAccountServices@cisco.com>
Sent: Monday, January 1, 2020 11:42 AM
To:
Subject: Cisco Smart Account Role Assigned - Cisco Demo Customer Smart Account

Cisco Smart Account Role Assigned - Cisco Demo Customer Smart Account

You have been assigned one or more new roles for the "Cisco Demo Customer Smart Account" Cisco Smart Account.

Cisco Smart Account Summary

Account Domain Identifier:	demo.cisco.com
Account Name:	Cisco Demo Customer Smart Account
Roles Assigned by:	Test (test@cisco.com)
Roles Assigned on:	Jan 1, 2020 10:42:22 GMT

You can visit [Cisco Software Central](#) to manage your Smart Account.

Roles Summary

- Smart Account Approver
- Smart Account Administrator

2

Cisco Software Central > Manage Smart Account Cisco Demo Customer

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

Users

Users | User Groups

Add Users... Remove Selected... Export Selected...

User	Email	Organization	Account Access	Role	User Group	Actions
<input type="checkbox"/>	testtest					
<input checked="" type="checkbox"/>	test testtest test	contro_1@hotmail.com	CISCO SYSTEMS LLC	All Virtual Accounts	Smart Account Administrator	- Remove...

1 User

How to Add New Users to a Smart Account

Modify Role Privileges of Existing User

- 1 **Smart Account Administrators** can view and edit user information by selecting the **User** name from the main **Users** tab. The **Smart Account Administrator** can view **User Info** and **Account Access**.
- 2 The **Smart Account Administrator** can **Assign Account Access** (assign a different role to the User),
- 3 or **Export the Account Access** information for that specific User.
- 4 The **Smart Account Admin** can also **remove a User's access** to the Smart Account by clicking on **Unassign**.
- 5 Click on **Continue** to remove the User from this Smart Account.

The screenshot shows the 'Edit User - test testtest' page in Cisco Software Central. The page is titled 'Cisco Software Central > Manage Smart Account' and includes a breadcrumb for 'Cisco Demo Customer Smart Account'. Navigation links include 'Account Properties', 'Virtual Accounts', 'Users', 'Custom Tags', 'Requests', 'Account Agreements', and 'Event Log'. The 'User Info' section displays: User Name: test testtest, Email Address: contro_1@hotmail.com, Cisco.com ID: test, and Organization: CISCO SYSTEMS LLC. The 'Account Access' section features two buttons: 'Assign Account Access...' (marked with a red circle 2) and 'Export...' (marked with a red circle 3). Below these is a table with columns: Account, Scope, Role, Assignment Source, and Actions. The table contains one row: 'All Virtual Accounts', '-', 'Smart Account Administrator', 'Direct Assignment to Account', and 'Unassign...' (marked with a red circle 4). A '1 Assignment' indicator is at the bottom right of the table. An 'Ok' button is at the bottom left of the page.

The modal dialog box is titled 'Unassign User from this Account' and contains a warning icon and the text: 'Are you sure you want to remove access to this account?'. At the bottom, there are two buttons: 'Continue' (marked with a red circle 5) and 'Cancel'.

How to Add New Users to a Smart Account

Export Users

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

The screenshot shows the Cisco Software Central interface for managing Smart Accounts. The 'Users' section is active, displaying a table of users. A red box labeled '1' highlights the 'Users' table with checkboxes for selection. A red box labeled '2' highlights the 'Export Selected...' button. A larger red box labeled '3' highlights the expanded table view, which shows the following data:

User	CCO ID	Email	Organization	Account Access	Role	User Group
test testtest	1	contro_1@hotmail.com	CISCO SYSTEMS LLC	All Virtual Accounts	Smart Account Administrator	-
this isatest	1	null	null	3_AMER Demo	Virtual Account User	-
this isatest	1	null	null	4_AMER Demo	Virtual Account User	-
this isatest	1	null	null	All Virtual Accounts	Smart Account User	-

How to Add New Users to a Smart Account

Remove Users

- 1 To remove multiple Users, select all Users by ticking the checkbox next to User, or tick the checkboxes next to selected Users.
- 2 Click on Remove Selected.
- 2a You can also remove a specific User by clicking on Remove under Actions.
- 3 Confirm by clicking on Remove User.

The screenshot shows the Cisco Software Central interface for managing a Smart Account. The 'Users' section is active, displaying a table of users. A dialog box titled 'Remove User from Smart Account' is open, showing a warning message and a 'Remove User' button. Red boxes and arrows highlight the 'Remove Selected...' button, the 'Remove...' action in the table, and the 'Remove User' button in the dialog.

✓	User	Email	Organization	Account Access	Role	User Group	Actions
✓	test						
✓	test testtest test	contro_1@hotmail.com	CISCO SYSTEMS LL	All Virtual Accounts	Smart Account Admin	-	Remove...
✓	this isatest nimooore			3_AMER Demo 4_AMER Demo	Virtual Account User Virtual Account User	- -	Remove...
✓	this isatest thhopkin			All Virtual Accounts	Smart Account User	-	Remove...

Remove User from Smart Account

Are you sure you want to remove this user?
They will lose access to the entire Smart Account, and they will be removed from any user groups they are in.
 Send email notification to user

Remove User Cancel



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

