



Partner Holding Account and Customer Smart Account Roles

How Partner/Customer internal roles can be mapped to Smart Account Roles



Partner Holding Account - Roles

Access to Holding Account and Partner Roles Involved

- 1 The access to the Partner Holding Account provides the following options:
 - Visibility to the orders assigned to a Partner Holding Account in Cisco Commerce.
 - Ability to re-assign the license on the order from the Partner Holding Account to the Customer Smart Account.
 - Option to set up email notification settings: receive an email when orders are provisioned to the Holding Account.
- 2 Examples of Partner Roles that should have access to the Partner Holding Account:

Partner Role	Partner Function	Smart Account Role* (Global Role)	Virtual Account Role* (Local/ Dept. Role**)
Post-Sales Specialist	Anyone who is reassigning an order from a Partner Holding Account to an End Customer's Smart Account.	Smart Account User	Virtual Account User
Purchasing Team Manager	Person managing the Purchasing Team.	Smart Account Admin	Virtual Account Admin
IT Admin Specialist	Person managing the IT Administration	Smart Account Admin	Virtual Account Admin

*A Smart Account Admin or User has access to the entire Smart Account, while a Virtual Account Admin or User has access only to selected Virtual Account(s).
 **Local/Department Role: the Partner may want separate Virtual Accounts by Organizational Unit * (ex. business line, product family, department, region, country, etc.) to allow separate access/ visibility to different purchasing departments and post-sales departments.

Customer Smart Account – Roles

Access to Customer Smart Account and Customer Roles Involved

- 1 The access to the Customer Smart Account provides the following options:
 - License Management in SSM, LRP, EA Workspace (for Users and Admins)
 - Smart Account Administration: Users, Virtual Accounts, Agreements (for Admins)
- 2 Examples of Customer Roles that should have access to the Customer Smart Account:

Customer Role	Customer Function	Smart Account Role* (Global Role)	Virtual Account Role* (Local/Dept. Role)**
License Management Specialist	Person managing licenses in SSM, LRP and EA Workspace.	Smart Account User	Virtual Account User
License Management Supervisor	a) Person managing the Smart Account: accepting the Smart Licensing Agreement, adding/deleting Users, adding/deleting Virtual Accounts. b) Person supervising the team of License Management Specialists and/or managing licenses in SSM, LRP and EA Workspace.	Smart Account Admin	Virtual Account Admin
Systems Engineer	Person who configures (registers) products in SSM.	Smart Account User	Virtual Account User
Purchasing Specialist or Manager	Person purchasing licenses from Cisco or the Partner. May need to verify that the licenses purchased are available in the Smart Account. May need to check if there are license shortages and purchase more licenses if needed.	Smart Account User	Virtual Account User
Legal Department Specialist or Manager	Person from the legal department in charge of accepting the Smart Licensing Agreement. This role can also edit account properties. No access to SSM, EA Workspace, LRP.	Smart Account Approver	N/A
IT Admin Specialist	Person managing the IT Administration	Smart Account Admin	Virtual Account Admin

*A Smart Account Admin or User has access to the entire Smart Account, while a Virtual Account Admin or User has access only to selected Virtual Account(s).
 **Local/Department Role: the Customer may want separate Virtual Accounts to segment licenses by Organizational Unit * (ex. business line, product family, department, region, country, etc.) and/or to allow separate access control to different sets of licenses.

