Cisco Services Access Management
User Guide

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Welcome to Cisco Services Access Management

Cisco Services Access Management enables Cisco's customers and partners to self-administer role-based user access to multiple Cisco Service programs. Based on the concept of Delegated Administration, users will be able to request to associate their individual Cisco user accounts with their company and request access roles in order to obtain company-level entitlements. All association and access requests are approved by the "Delegated Administrator", a trusted person at the customer or partner company, who assumes responsibility for managing user access on behalf of their company.

Cisco Services Access Management provides proactive access management aimed at enabling self-service access management, allowing customers or partners to run their business more efficiently.

This document highlights the following major functional areas of Cisco Services Access Management:

- Overview
- Introduction to Delegated Administration
- Company and Administrator settings
- User-Company Associations
- User-Role Assignments
- Additional Administrators

Overview

What is Cisco Services Access Management

Cisco Services Access Management provides for "party-centric" role-based access to new Cisco Smart Services. Rather than requiring a contract administrator to explicitly add a user to each and every contract to which they should be able to get support, party-centric access allows for all users that are associated to the customer or partner "party" to automatically get access to the support services to which their company is authorized. The level of access can be further filtered or controlled through the assignment of specific access roles, allowing for a tailored user experience.

For a list of the features of Cisco Services Access Management, refer to Appendix B.

What service programs are enabled by Cisco Services Access Management

The evolution to party-centric role-based access to all Cisco services will occur over time. Currently, Cisco Services Access Management provides access to the following programs and services:

- Smart Support API
- PSS API
- One Portal Smart Service Capabilities

What are the benefits of using Cisco Services Access Management

Cisco Services Access Management is designed to flexibly accommodate companies of various sizes (based on the number of locations and users) and allows for centralization or decentralization of administration according to each company's desired policy.

When a trusted person is nominated as the first Delegated Administrator for a company, they have the option to nominate additional company administrators, or set up multiple branch locations that can be administered separately by multiple administrators. This administrative structure can be changed over time, based on growth and usage by additional service programs.

Delegated Administration allows you to independently decide who in your company should have access to each Cisco Service program. Rather than contacting Cisco to submit access, the Delegated Administrator has complete control to self-administer user access.

Through self-service administration, individual users have the ability to submit a request to associate their User ID to their company, and to request role assignments in order to access Cisco services resources. The Delegated Administrator will then review and either approve or deny those requests. Alternatively, the Delegated Administrator can explicitly make the user associations and assign the roles, without waiting for the user to submit a request.

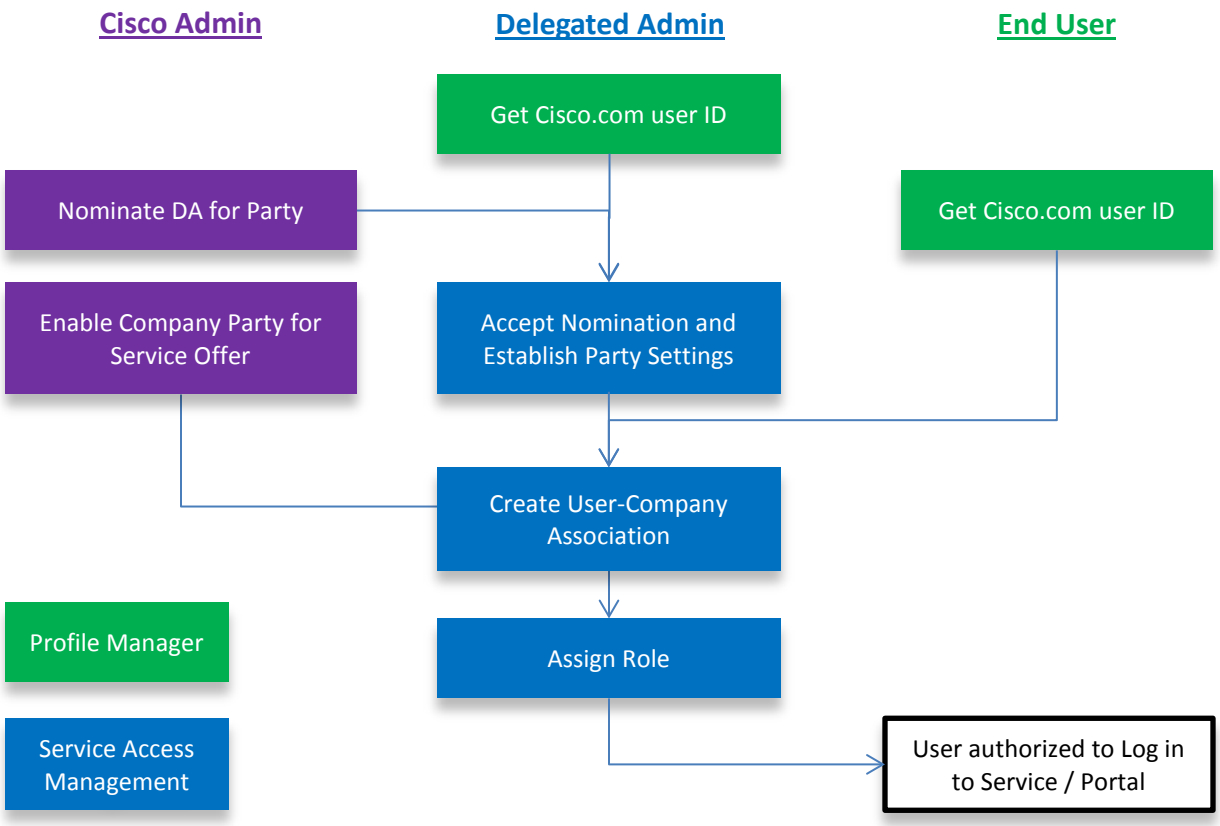
Introduction to Delegated Administration

Delegated Administration allows for user self-service access, providing a structure to enable customers and partners to assume greater control over “who gets access to what”.

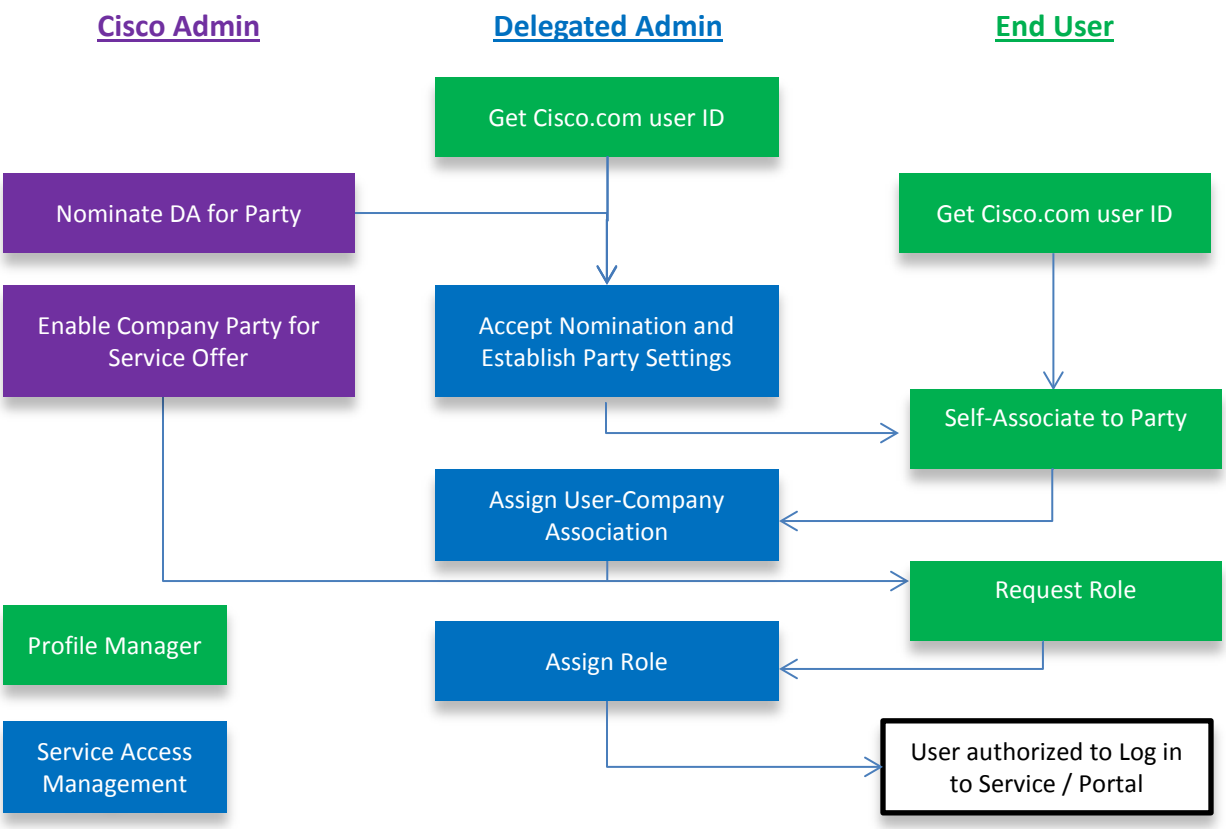
Depending on the size of your company or the number of users to manage, one Delegated Administrator can manage all user requests, or nominate additional Delegated Administrators to manage the load.

The sample flows below show two basic models of how a Delegated Administrator can manage user access, through the use of Cisco Services Access Management and Cisco.com Profile Manager.

Default administration process flow



User self-association process flow



Nomination of a Delegated Administrator

A Cisco Administrator will initially nominate a known and trusted person at a partner or customer company to be the first Delegated Administrator for their company. The Delegated Administrator will use Cisco Services Access Management to associate valid users to their company and assign them roles to gain access to the protected Cisco Services that are available to that company.

Acceptance of Delegated Administrator nomination during first login

The nominee will receive email notifications informing them that their Cisco account has been associated to their company record, and that they have been nominated to become the Delegated Administrator for their company.

Dear Adam Strader,

You have been nominated to become a Services Delegated Administrator for the following location:

VERIZON COMMUNICATIONS INC.
140 WEST ST
NEW YORK, NY
10007
US

As a Delegated Administrator for your company, you can use Cisco Services Access Management to associate valid users to your company and assign them roles to gain access to protected Cisco Services that are available to your company.

In order to complete this nomination, please click on the link below to login to Cisco Service Access Management. On successful login, you will be presented with the Cisco Service Access Management Agreement which will need to be reviewed and accepted.

Cisco Service Access Management

Once you accept the Agreement, you will also have the ability to nominate additional Delegated Administrators. If you like to pass this role on to another person in your company, you can nominate that person as a Delegated Administrator and then Remove yourself via the View Existing Administrators menu option.

If you have any questions about this nomination, please click the link below:

Contact Delegated Administrator

Privacy Statement	Read more about our privacy statement.

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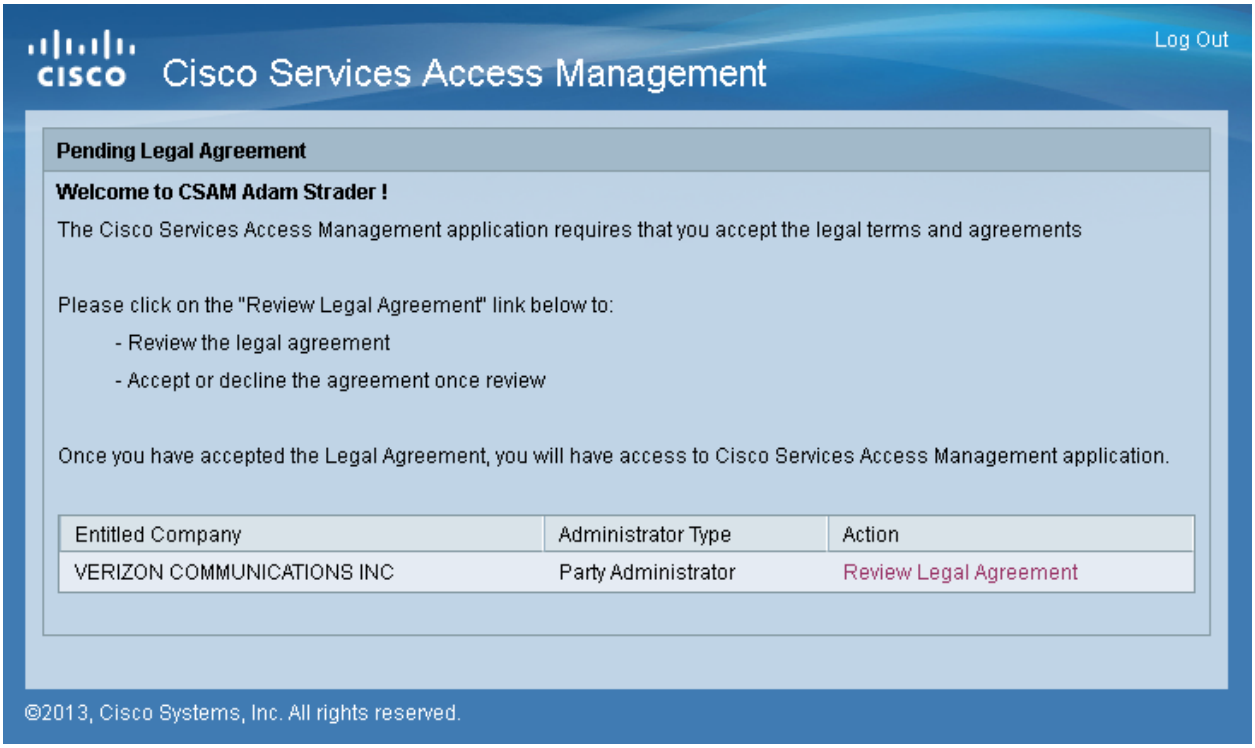
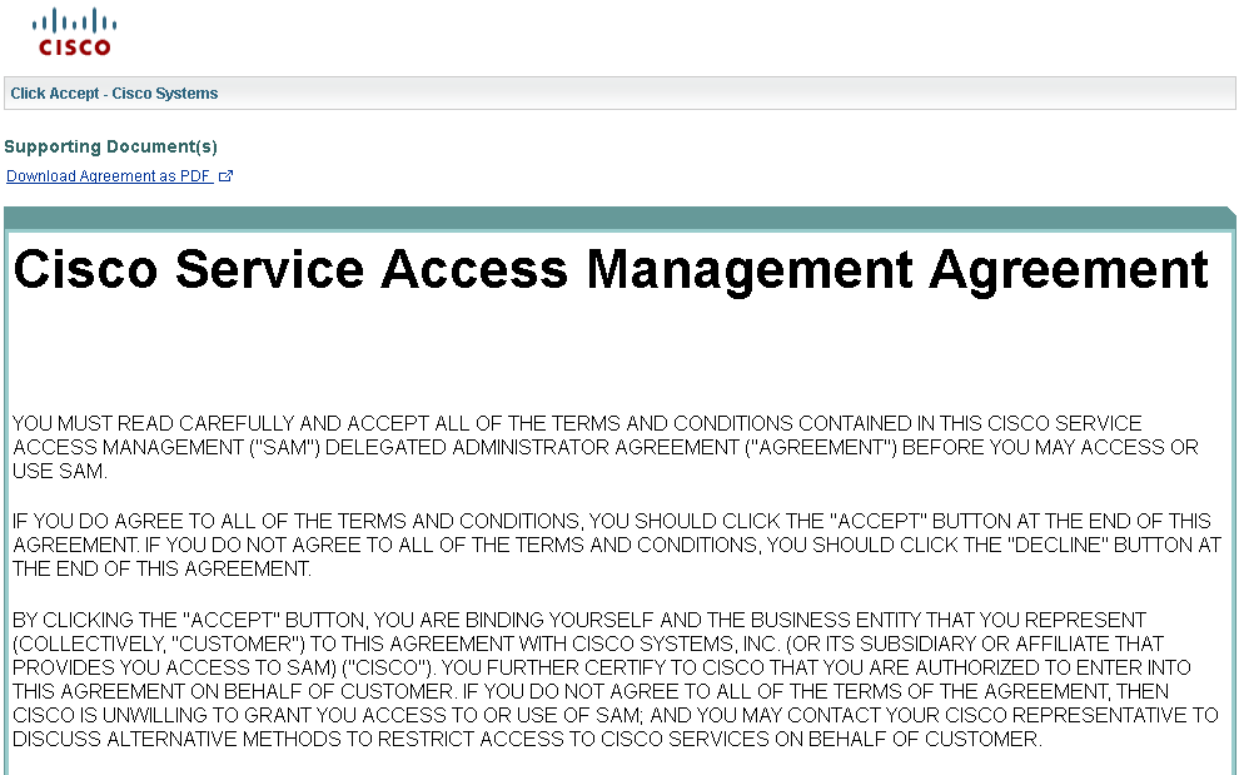
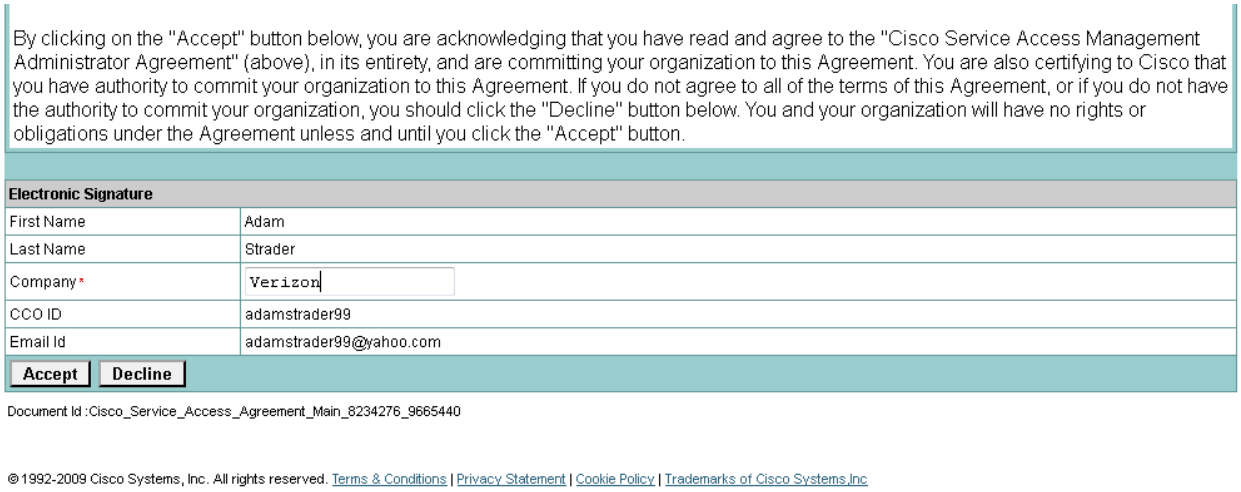
Cisco Systems, Inc. 170 West Tasman Drive, San Jose, California 95134

Use the link in the email to view the Terms & Conditions of becoming the Delegated Administrator for your company.

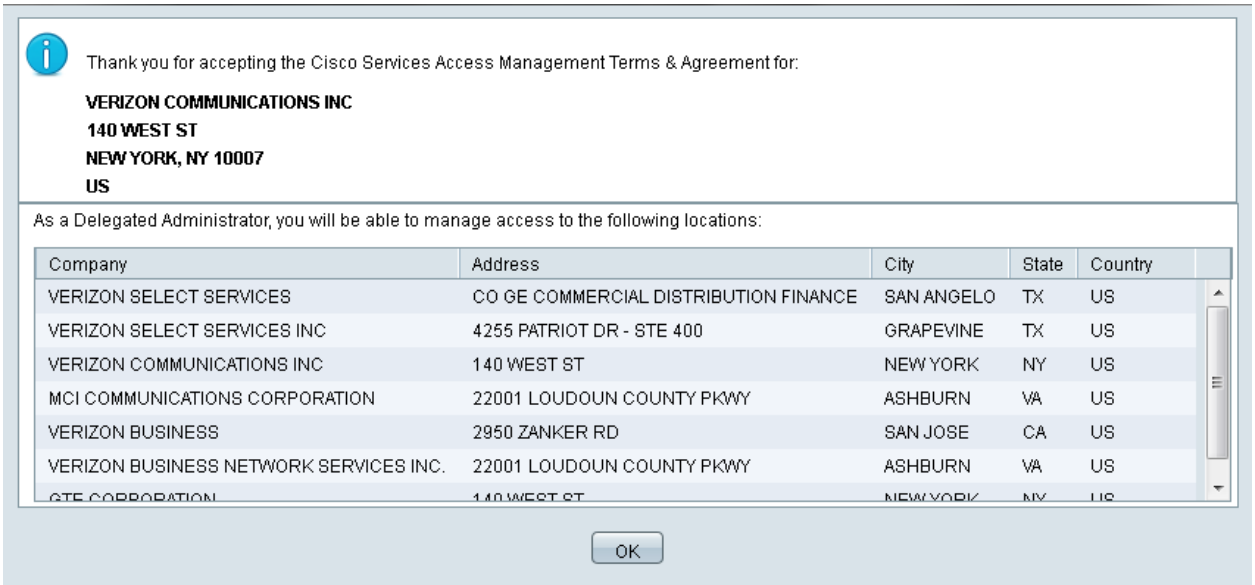




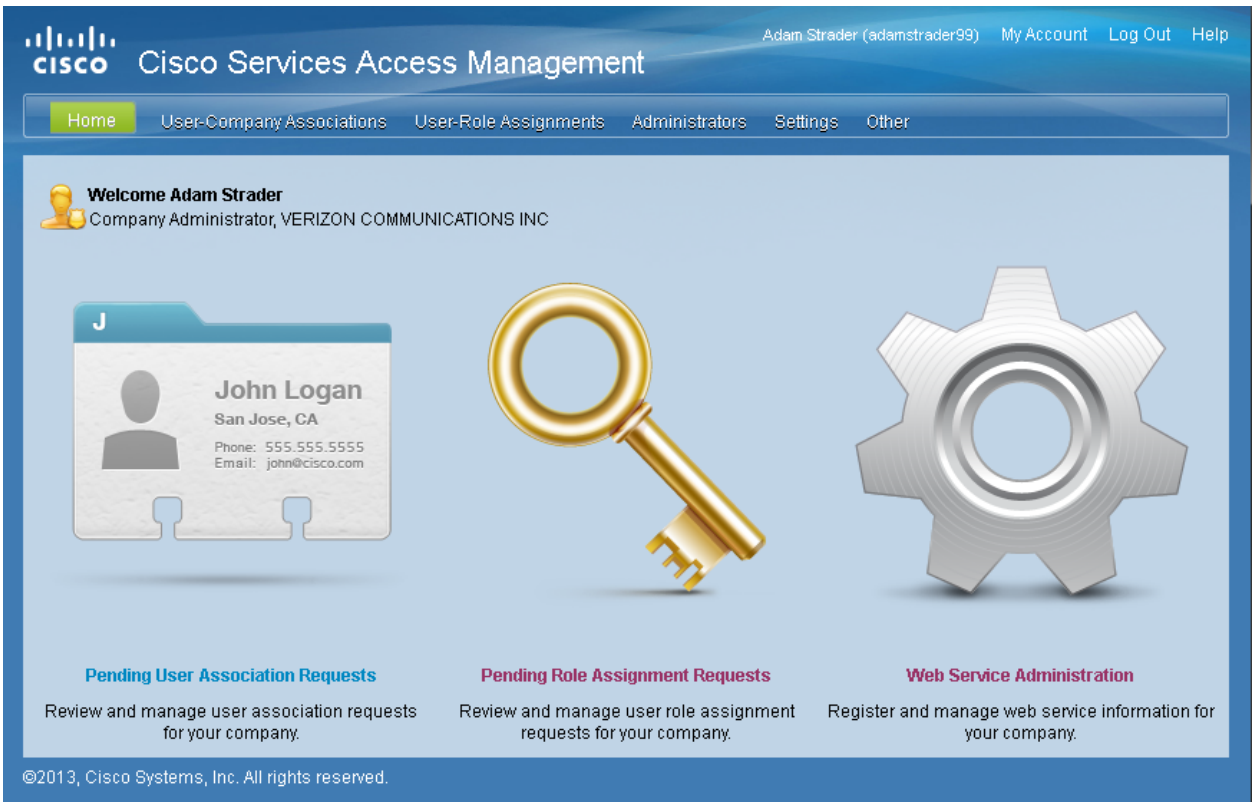
After reading the Terms and Conditions, enter your company name and click on the “Accept” button at the bottom of the agreement.



A confirmation pop-up will appear.



Click OK, and the Cisco Service Access Management home page will appear:



Note: The Delegated Administrator role only gives you access to associate users to your company and assign service access roles to users. For you to also have access to specific Cisco Business Services, you must assign one or more roles to yourself.

Establishing Company and Administrator Settings

Cisco Services Access Management can be tailored to function in a way that best fits with your company's size, structure, and access management policies. The Delegated Administrator will establish both company-wide settings and administrator-level settings that control how individual users request association to their company, and how each Delegated Administrator is notified to take action.

Company Association Settings

Initially, each Cisco customer or partner company is profiled as a single location. Additional locations and administrators can be added as needed, for any locations under that company hierarchy.

Cisco Services Access Management provides three ways to help direct a user's company association request to the correct company, and to the correct administrator for review and approval:

- Email domain matching
- Company passcode
- Company name and address search

Through the establishment of the Company Settings, the Delegated Administrator can individually allow or not allow, or combine these options, in order to flexibly control the user self-association process.

Email Domain Matching

If your company has its own email domain(s), and all of your users register on Cisco.com using their company email address, then you can leverage email domain matching to enable your users to easily associate, and simultaneously prevent other users from attempting to associate to your company.

Company Passcode

If your company does not have its own email domain, you can prevent unknown users from attempting to associate to your company by establishing a company-level passcode, which can then be shared internally among your company. The use of a company passcode can also be used to eliminate the need for a user to search for their company record by name and address.

Company Name and Address

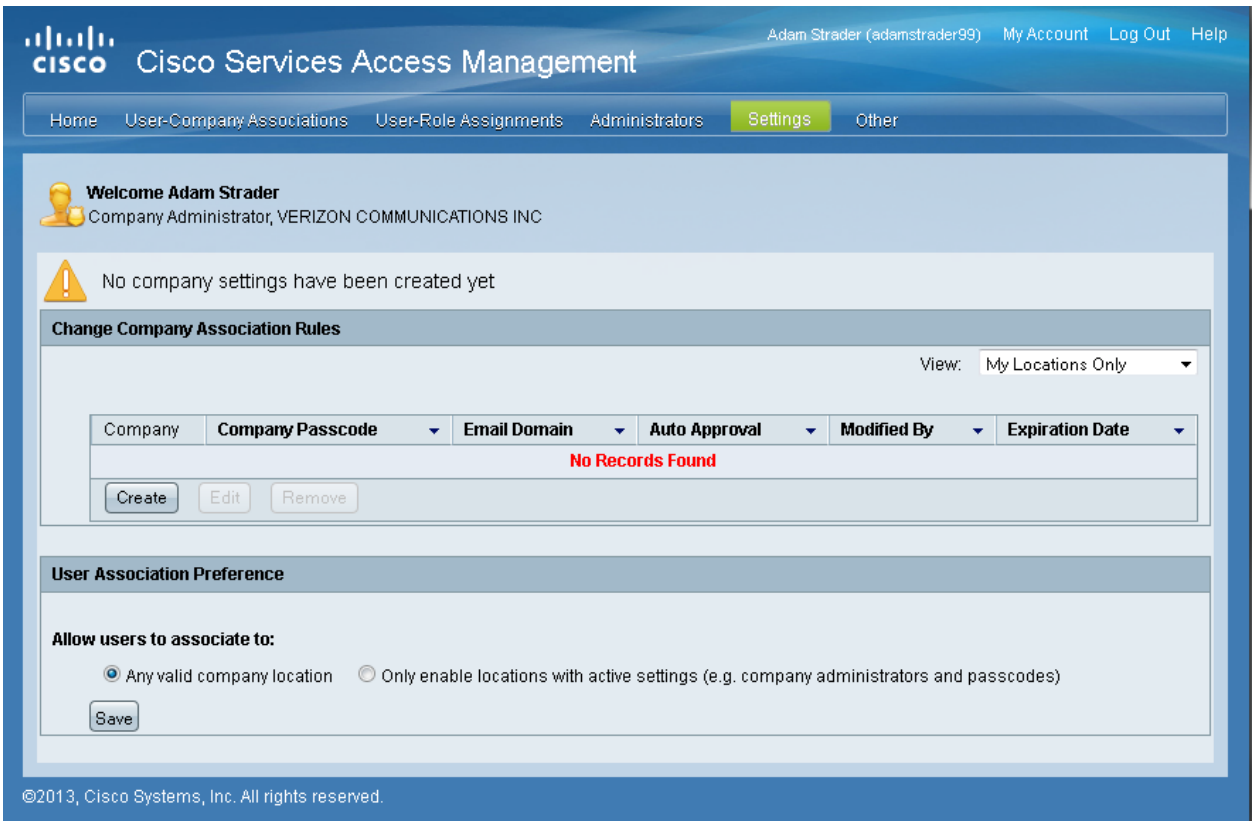
If your company is relatively small and does not have multiple locations, or if the other options do not meet your needs, you can allow users to request company association by searching on company name and address.

Administrator Notification Settings

Each Delegated Administrator can customize how and when they are notified of pending self-association and role assignment requests. Used in conjunction with the company association settings, this allows each company to tailor their access management process and policies, with the ability to establish complete self-service access that is "managed by exception", or a more restrictive policy that requires explicit, directed administration.

Setting Company Association Rules

Use the top menus to navigate to “Settings→ Change Company Association Rules”. Initially, there will be no records of any association rules setup for your company.



If you are the Delegated Administrator for the headquarters of your company, you will see the section for setting the “User Association Preference”. This setting will help you to control which company location(s) the users can request association with.

You have 2 options available:

- Any valid company location

  By selecting this you allow users to request association to any valid locations of your company, even those without any company administrators.
- Only enable locations with active settings (e.g. company administrators and passcodes)

  It is recommended to select this option.

  By doing so, users will be able to request association only to company locations that have an active administrator. Selecting this option allows you to manage user-company associations by taking advantage of the “Delegated Administration” feature.

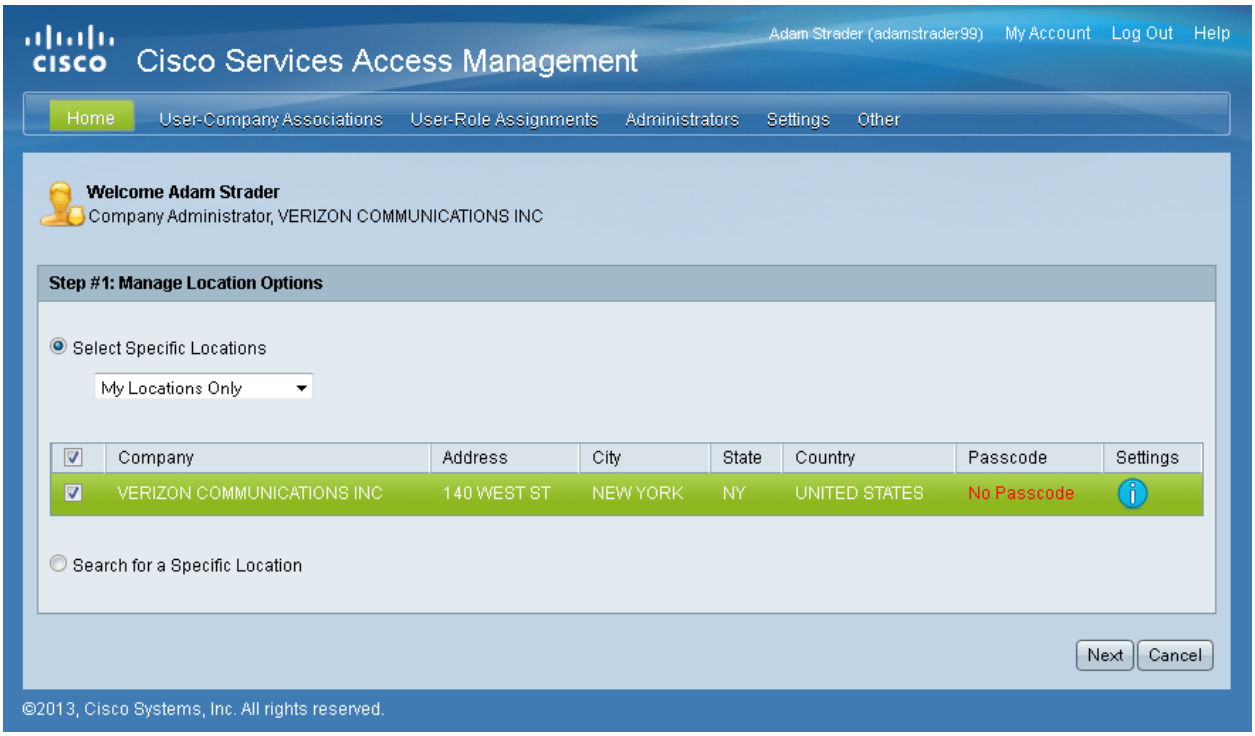
Click on “Create” to setup the company association rules for your location or multiple locations of your company.

Step #1: Manage Location Options

Choose the appropriate radio-button option, to either:

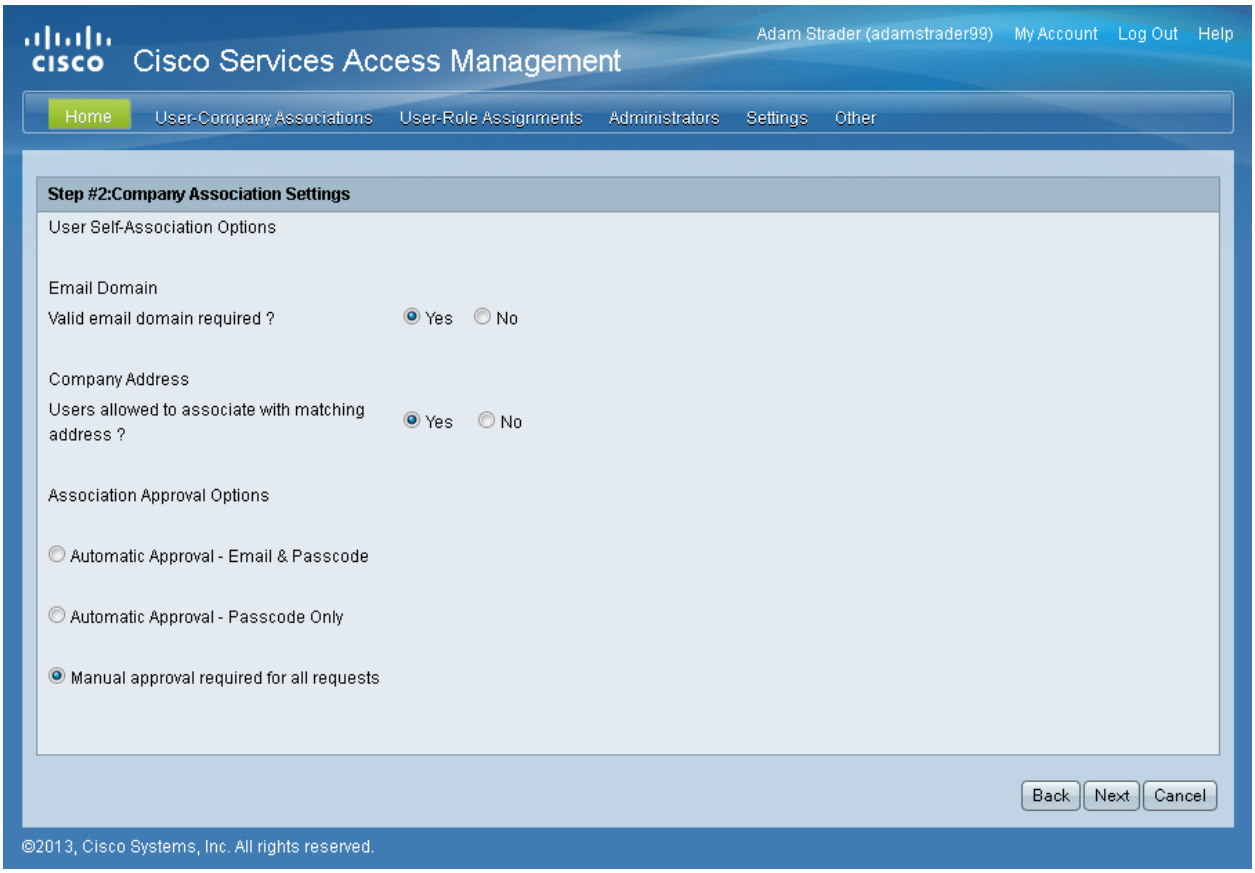
- ***Select Specific Locations*** This is the best choice for companies with a small number of locations being managed.
- ***Search for a Specific Location*** You may prefer to use this option if you have dozens of locations and don’t want to page through a long list to find the specific location to manage.

Based on your choice, the system will display a list of company locations. Select the location you wish to manage, and click on “Next”.



Step #2: Company Association Settings

This screen allows you to define user self-association rules that apply to all locations of your company.



User Self-Association Options

- ***Email domain matching*** Selecting "Yes" will leverage the email domain matching feature. This will enable users who registered in Cisco.com using their company email address to associate with your company, while preventing other users from doing so.
- ***Company address matching*** Selecting "Yes" allows users to submit a company association request based on company name and address. This option is only recommended when used in conjunction with email domain matching or a company passcode. You may change this later based on your company needs, depending on the size of your company and the number of managed locations.

The following table describes the impacts to the self-association process, depending on how the questions are answered:

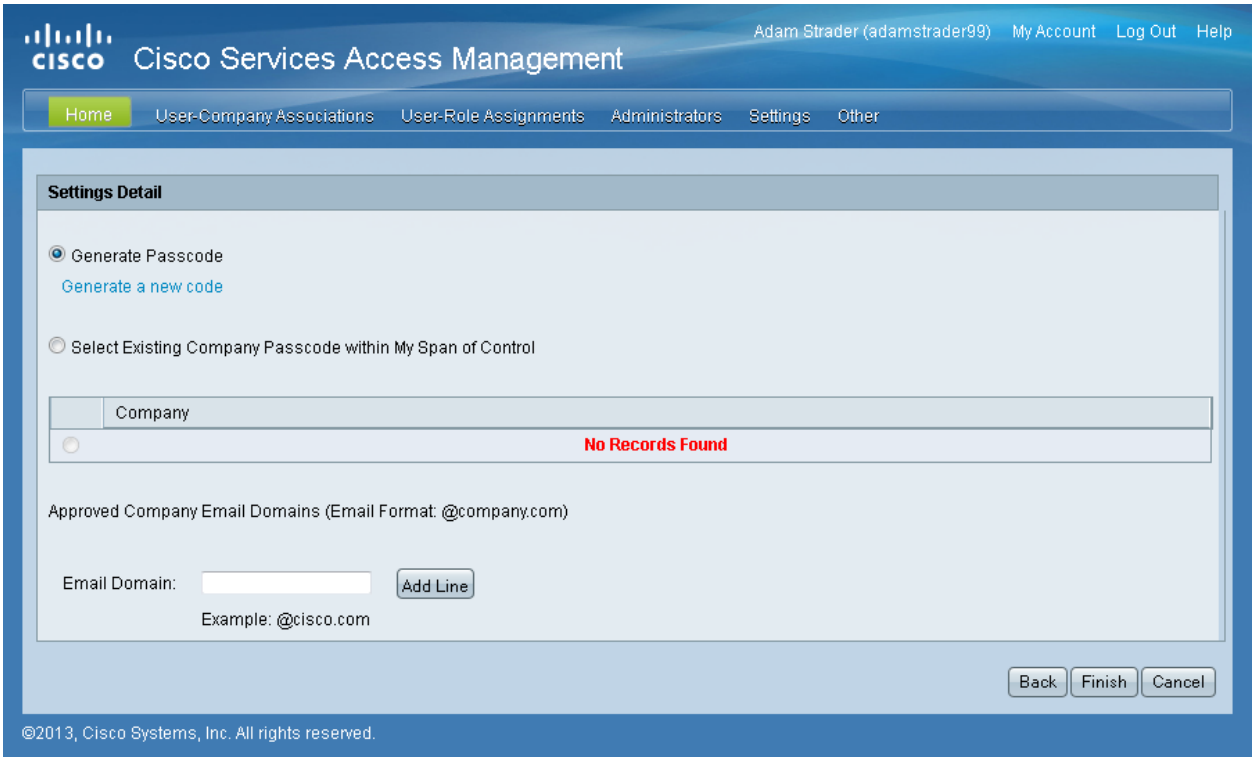
Email Domain Matching	Company Address Matching	Impact on Self-Association requests via Profile Manager
Yes	Yes	Only users who registered in Cisco.com with their company email address will be able to request company association, and will also be able to search for a specific company location based on name and address. Best choice for a large company with many locations being independently managed by multiple Delegated Administrators.
Yes	No	Your company will not appear in searches by users outside your company (or who registered in Cisco.com with a personal email address). Best choice for a company with their own email domain but only a relatively small number of company locations being used for access management.
No	Yes	Note that this option may cause your company to appear in search results with other companies that also allow users to submit association requests solely by company address matching. Best choice for a company that does not have its own email domain, but wants to allow users to find your company by name and address.
No	No	This combination restricts self-registration requests to only those users who know the company passcode. Best choice for a company that does not have its own email domain, but does not want to appear when users search by address.

Association Approval Options

A Delegated Administrator can potentially reduce their workload by automatically approving requests, depending upon the information that was provided during the self-association process. The Delegated Administrator may choose to automatically approve requests from any user who provides the company passcode, or only if the user's email address also matches the company's email domain. Or, you may prefer to explicitly review and approval all association requests.

After making your selections on this page, click on "Next".

The final step in establishing company settings is to define the company passcode and email domain.



You have the following options to establish a company passcode:

- Generate Passcode
  Select this option to generate a new passcode for your company location by clicking on the link provided.
- Select Existing Company Passcode within My span of Control
  This option may be selected when setting up company association rules for additional locations of your company.

To leverage email domain matching, allowing your users to easily request association to company, enter one or more valid email domains, in the format ***@domainname.com*** . Only enter email domains that are uniquely registered to your company.

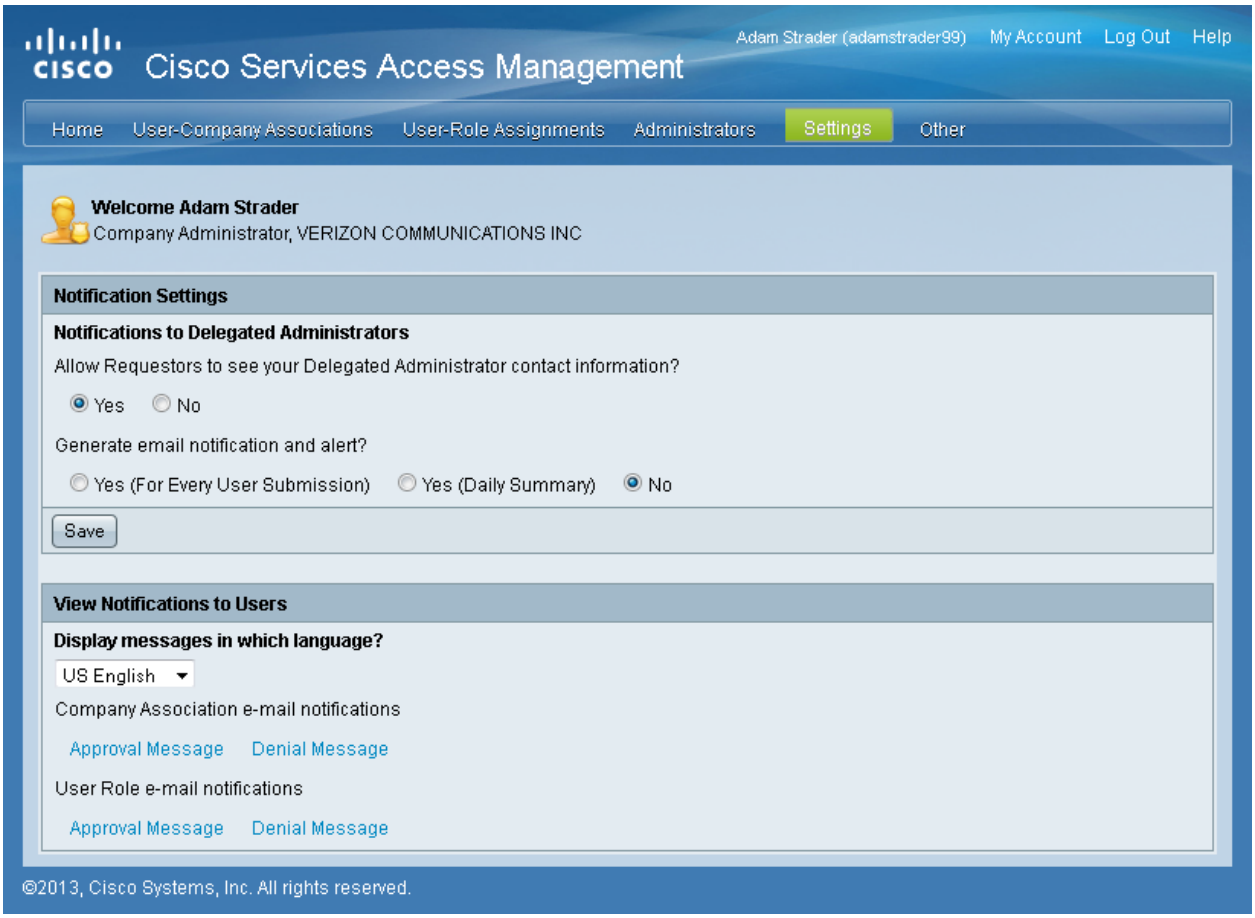
Click on “Finish” to save these settings for your company location. A confirmation message is displayed, along with the details of the association rules you have setup for your company.

Setting Notification Preferences

Each Delegated Administrator will establish their notifications settings by using the top menus to navigate to "Settings → Change Notification Preferences".

On this screen, each Delegated Administrator will:

- Determine visibility of their contact information, to users requesting association (or already associated to) the company. By making contact information available, users can follow up on pending requests, or contact their Delegated Administrator regarding access issues. If contact information is not made visible, users will have the ability to send an email to the Delegated Administrator through a blind submission function.
- Decide the frequency of the email notifications or alerts they want to receive for any user activity. This applies to pending requests as well as notification of approval of requests. It is recommended to initially select "Yes (For Every User Submission)" so that the Delegated Administrator is notified for every user request made or approved. This can be changed over time based on your needs.



Click on "Save" to complete the setup for your Notification Settings. A confirmation message is displayed.

User-Company Association and Management

This section talks about user-company association and management. There are multiple ways users can be associated with your company.

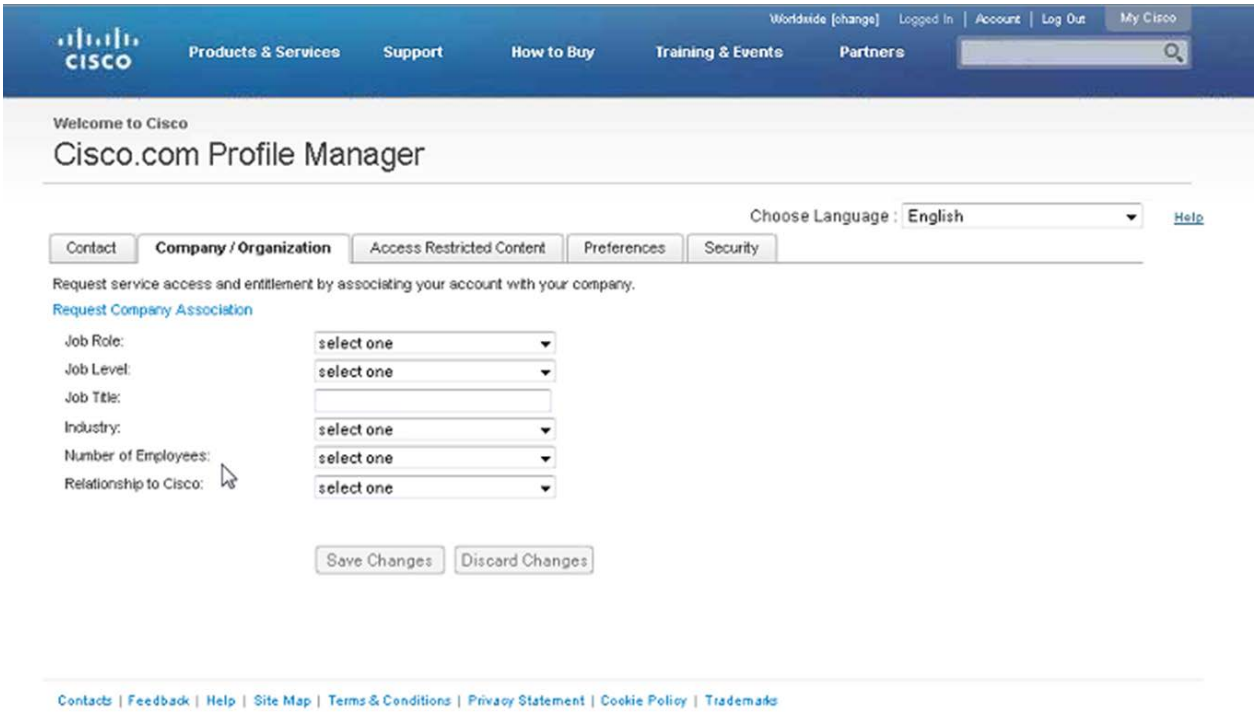
- Self-Association via Profile Manager
- Company association of a single or multiple users by company administrators

User company associations can also be changed or deleted over time by company administrators based on the needs or when users leave the company.

User company self-association

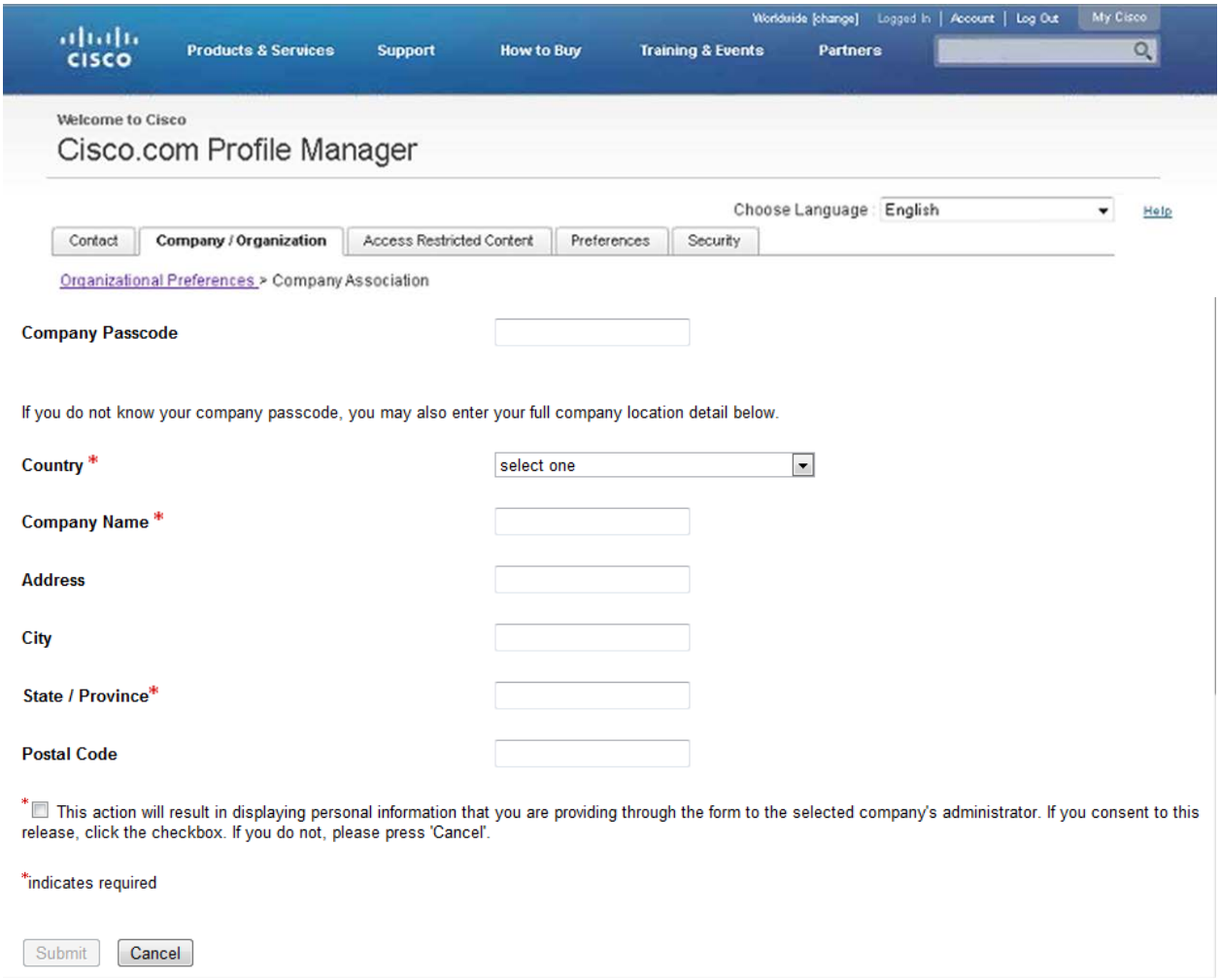
A user's request for self-association to their company will be submitted via Cisco.com Profile Manager. The request will be directed to the company Delegated Administrator based on the information they provide, and the association criteria established for the company.

In Profile Manager, the user can request association using the link "Request Company Association" under the "Company/ Organization" tab. Note: Request Company Association link is only available in Stage.



Company association can be requested by providing the company passcode or by searching for the company location by address.

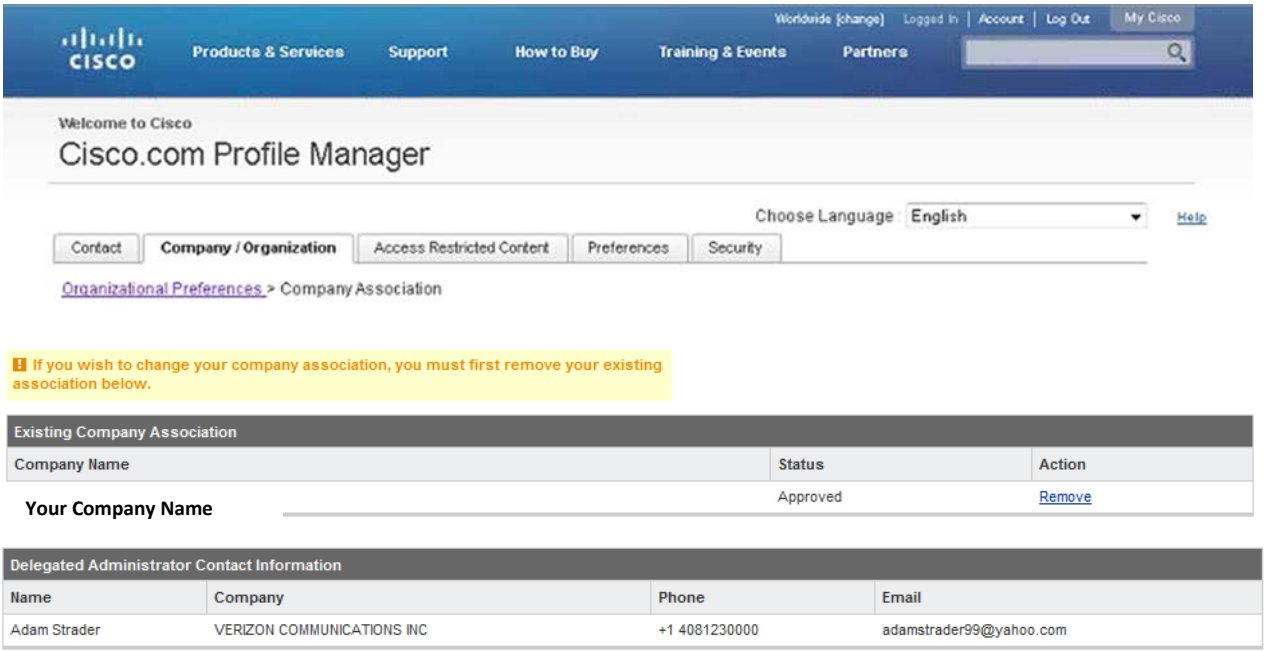
If the company settings established by you allow searching by address, users will be able to select the company location from a list. However, company association using company passcode will enable a quick and easy submission of request. Users can enter the company passcode provided by you while establishing the company settings in Cisco Services Access Management.



Select the checkbox for accepting the Terms & Conditions to confirm sharing your profile information and click on “Submit”.

This will ensure that the user’s profile information is displayed in Cisco Services Access Management, allowing company administrators to identify who is requesting access. Confirmation message is shown if the request has been submitted successfully.

On subsequent logins to Profile Manager, click on “View/Update Company Association” link to view the status of your company association request.



The status will be “Approved” if the user’s request has been approved by a Delegated Administrator of your company. Otherwise, this request will be in “Pending” state.

The user will only be able to see the Delegated Administrator(s) contact information if you had opted to show your details while setting your Notification Preferences.

Why do we show your contact information? This will allow users to follow up on their requests; they can call/email using the company administrator information provided, otherwise a blind email will be sent.

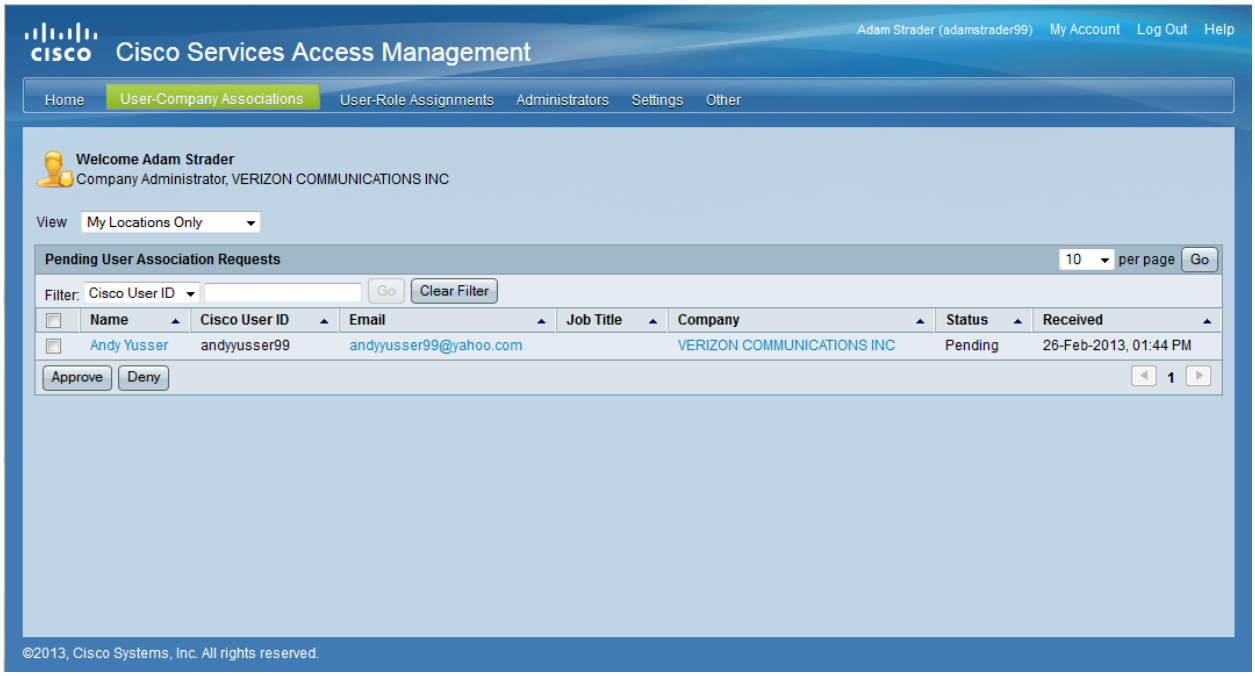
Notifications are sent to the company Delegated Administrator(s) informing that a user has requested association to their company or specifying that a user request for self-association to the company was auto-approved if it met the criteria for established by you for company association settings.

Once the request for company association is approved or denied by Delegated Administrator of the company, user will be notified via email about the change to their Cisco Account.

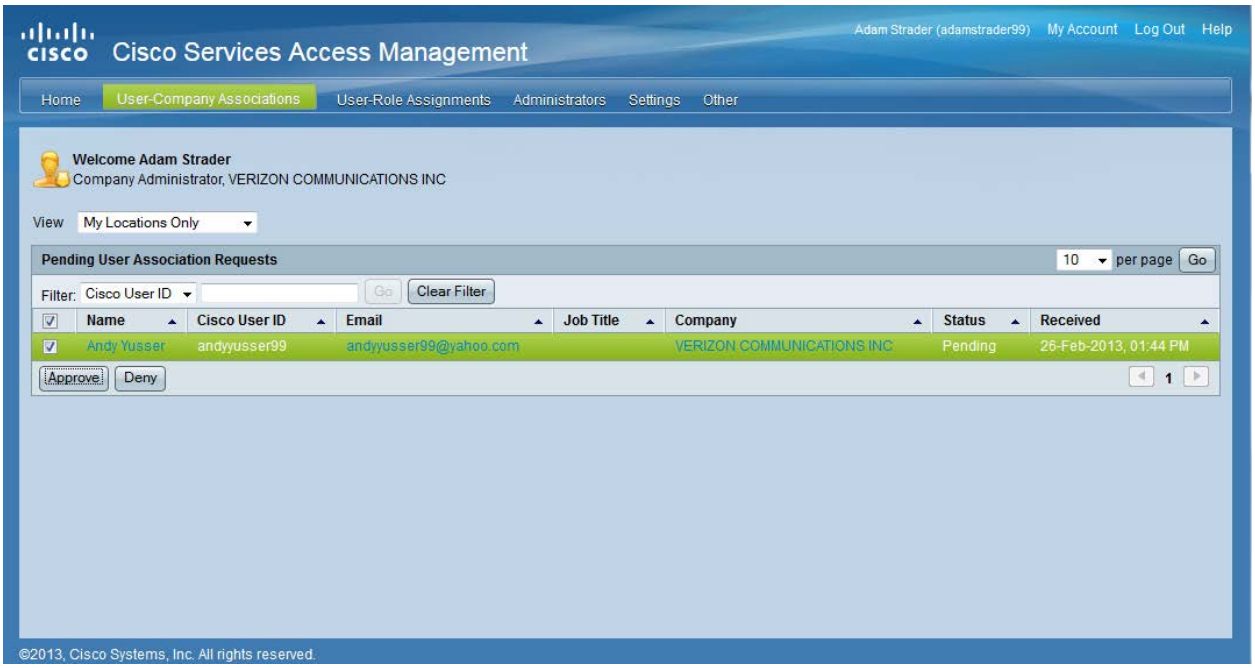
Managing user requests for company association

Delegated Administrators will need to approve/deny pending user requests for company association using Cisco Services Access Management.

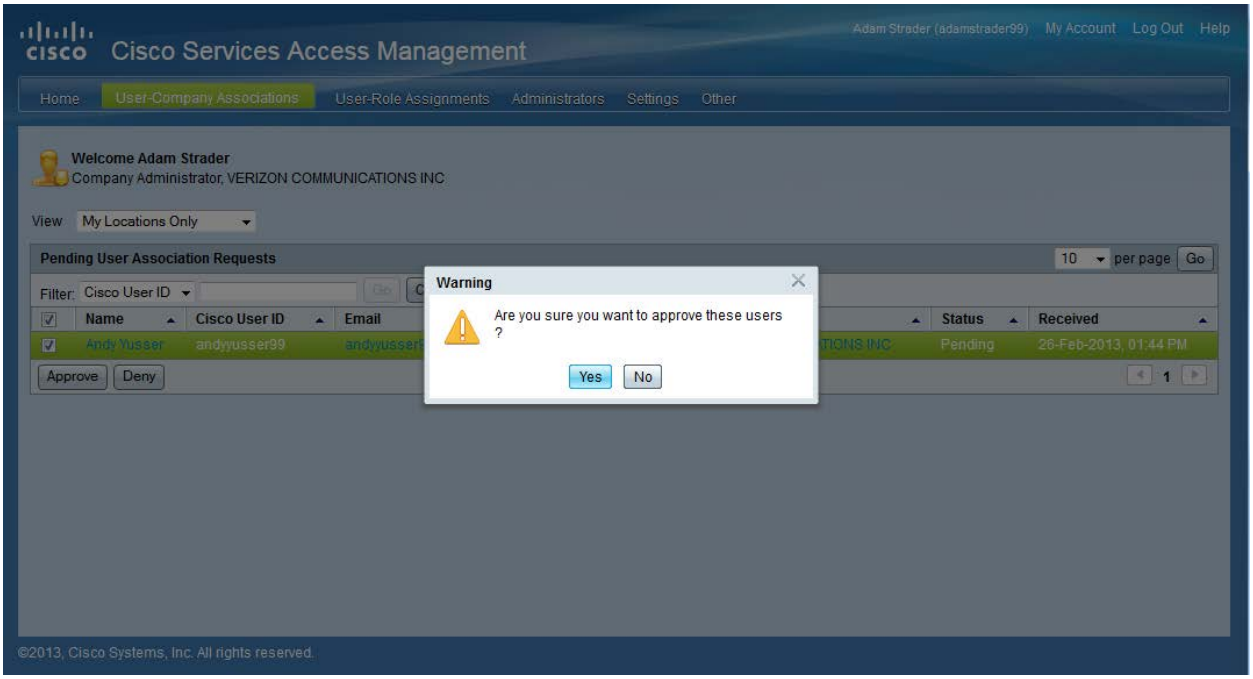
Use the top menus to navigate to “User-Company Associations → Pending User Association Requests”. This manual approval/denial is required if the company settings was previously set to “Manual Approval Required”.



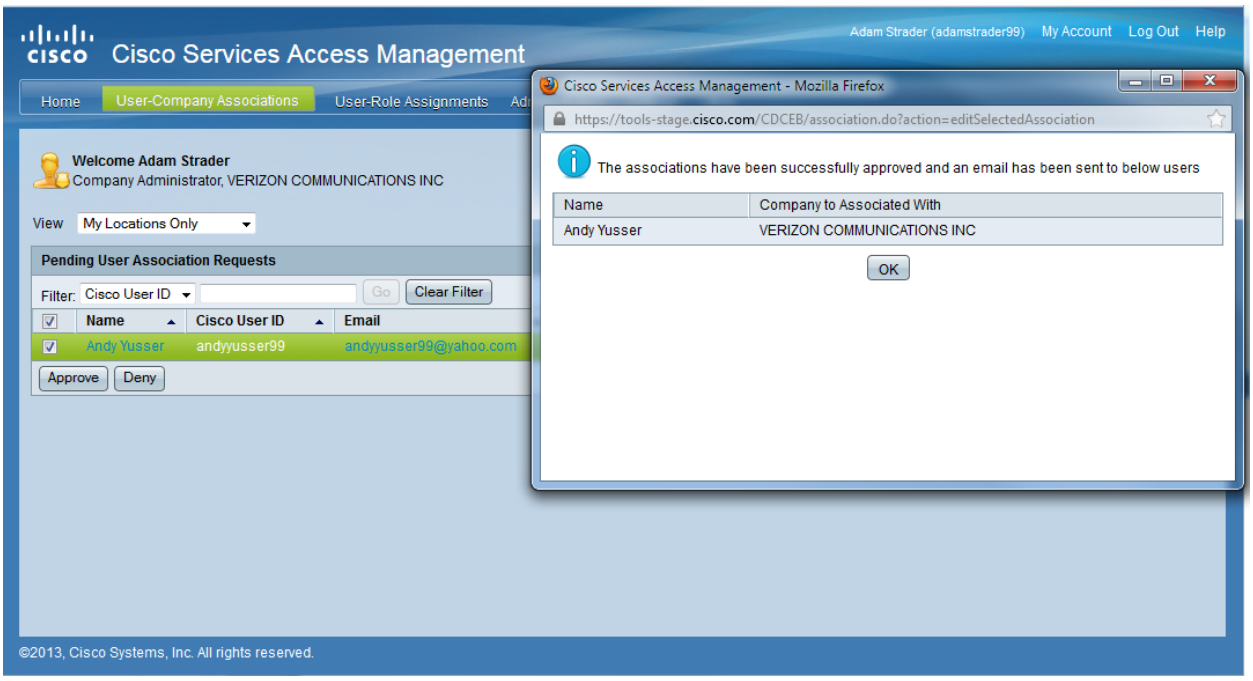
A list of pending requests will be shown. Select the record(s) which needs to be approved/denied and click on “Approve” or “Deny”.



Pop-up to confirm selection will be shown. Click on “Yes” to confirm decision.



Another pop-up window will be shown with a confirmation message and a list of users that were approved/denied association to company. Click “OK” to go back to the “Pending User Association” screen. A list of user requests pending approval, if any, will be displayed.


Cisco Services Access Management
Adam Strader (adamstrader99) My Account Log Out Help
Home
User-Company Associations
User-Role Assignments
Welcome Adam Strader
Company Administrator, VERIZON COMMUNICATIONS INC
View
My Locations Only
Pending User Association Requests
Filter:
Cisco User ID
Go
Clear Filter
Name
Cisco User ID
Email
Andy Yusser
andyyusser99
andyyusser99@yahoo.com
Approve
Deny
©2013, Cisco Systems, Inc. All rights reserved.
Cisco Services Access Management - Mozilla Firefox
https://tools-stage.cisco.com/CDCEB/association.do?action=editSelectedAssociation
The associations have been successfully approved and an email has been sent to below users
Name
Company to Associated With
Andy Yusser
VERIZON COMMUNICATIONS INC
OK

User company association using Cisco Services Access Management

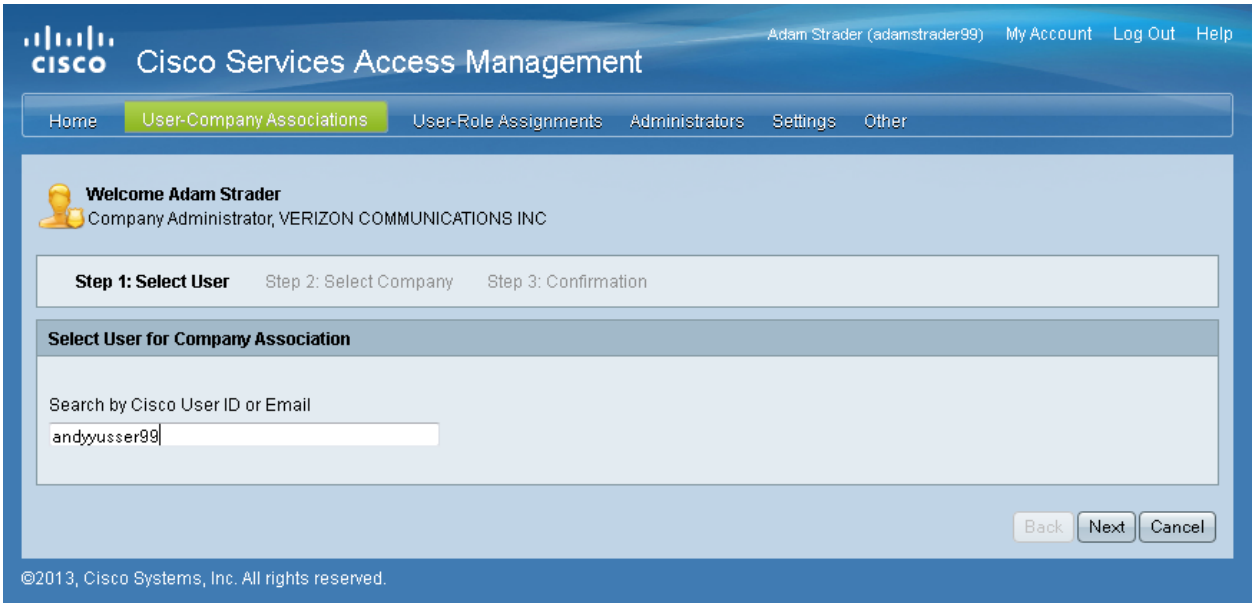
The above sections describe the user self-association request and approval process. As an alternative, a Delegated Administrator can directly associate users to their company, either individually or through a batch upload.

User-to-company associations can be managed by one or more company administrators, for a given company location or multiple company locations. Refer to the Nomination of Additional Delegated Administrators section in this document to learn more about creating and managing access for multiple Delegated Administrators in your company.

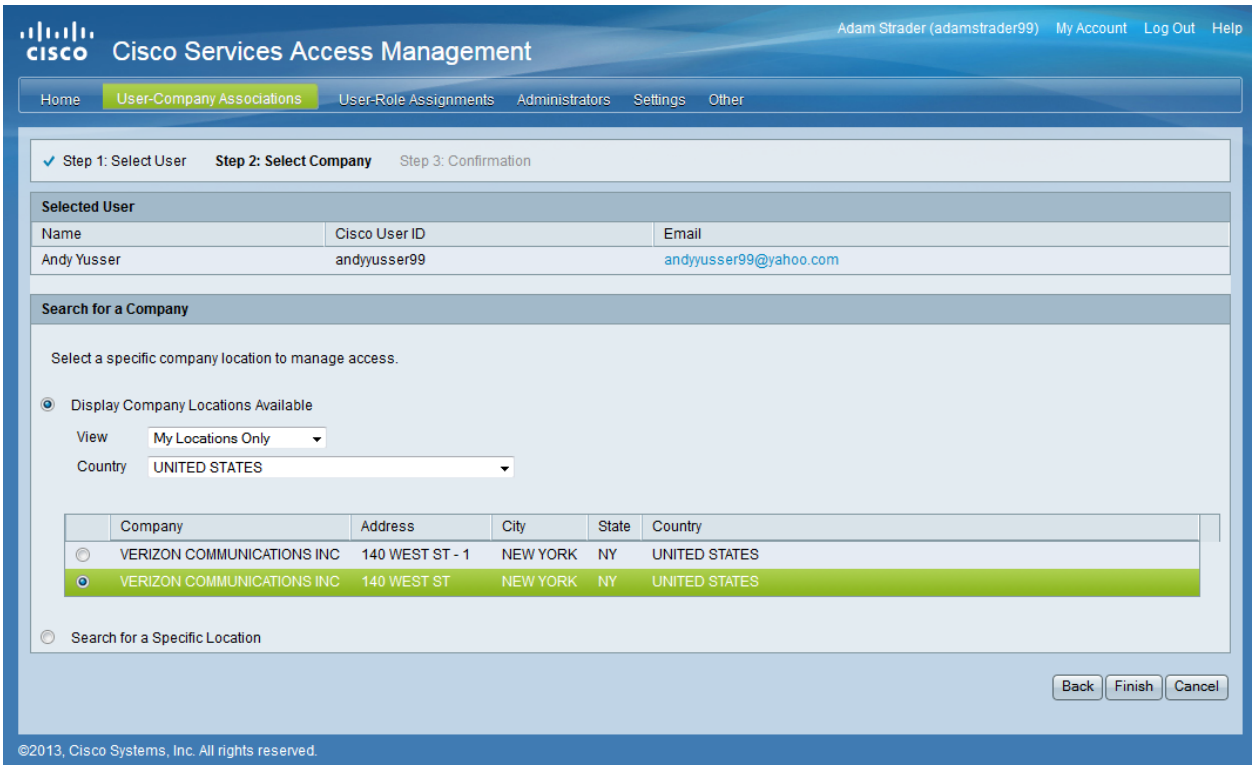
Single User-Company Association

To associate a single user to your company, use the top menus to navigate to "User-Company Association → Associate User to My Company".

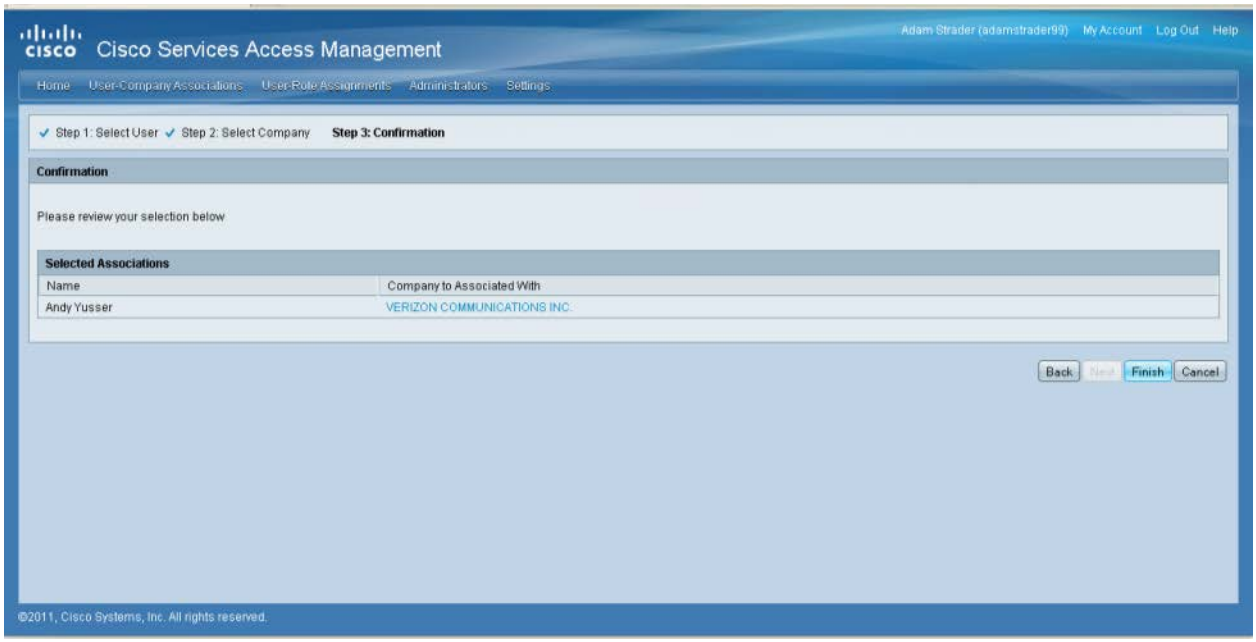
Step 1: Select User Enter the CCO ID or email address of the user that you want to associate to your company, and click on "Next".



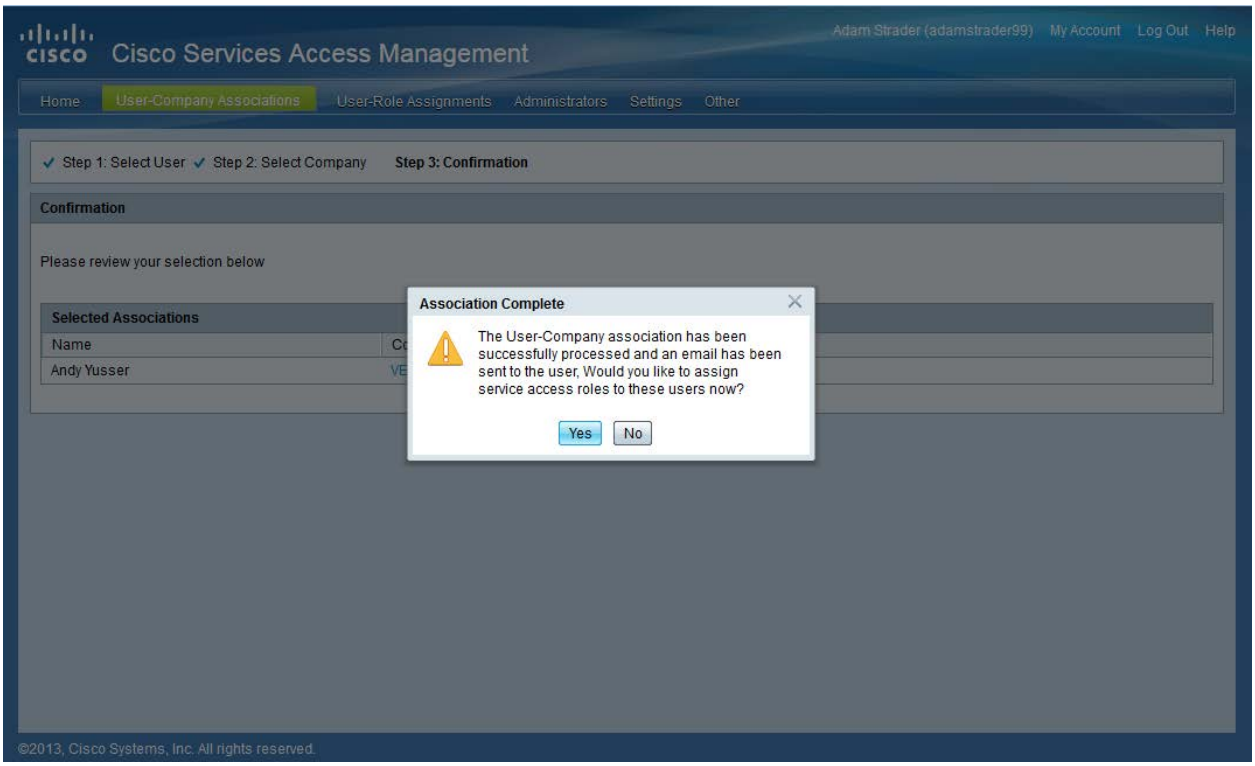
Step 2: Select Company Select the company location from the list of existing locations, or search for a specific location, and click on "Next".



Step 3: Confirmation Verify the details of the user and company selected, and click on “Finish”.



If you want to immediately assign access roles to this newly-associated user, answer “Yes” to the pop-up message. Select “No” if you want to assign roles to the user at a later time.


Cisco Services Access Management
Adam Strader (adamstrader99) My Account Log Out Help
Home
User-Company Associations
User-Role Assignments
Administrators
Settings
Other
Step 1: Select User
Step 2: Select Company
Step 3: Confirmation
Confirmation
Please review your selection below
Selected Associations
Name
Andy Yusser
Association Complete
The User-Company association has been successfully processed and an email has been sent to the user, Would you like to assign service access roles to these users now?
Yes
No
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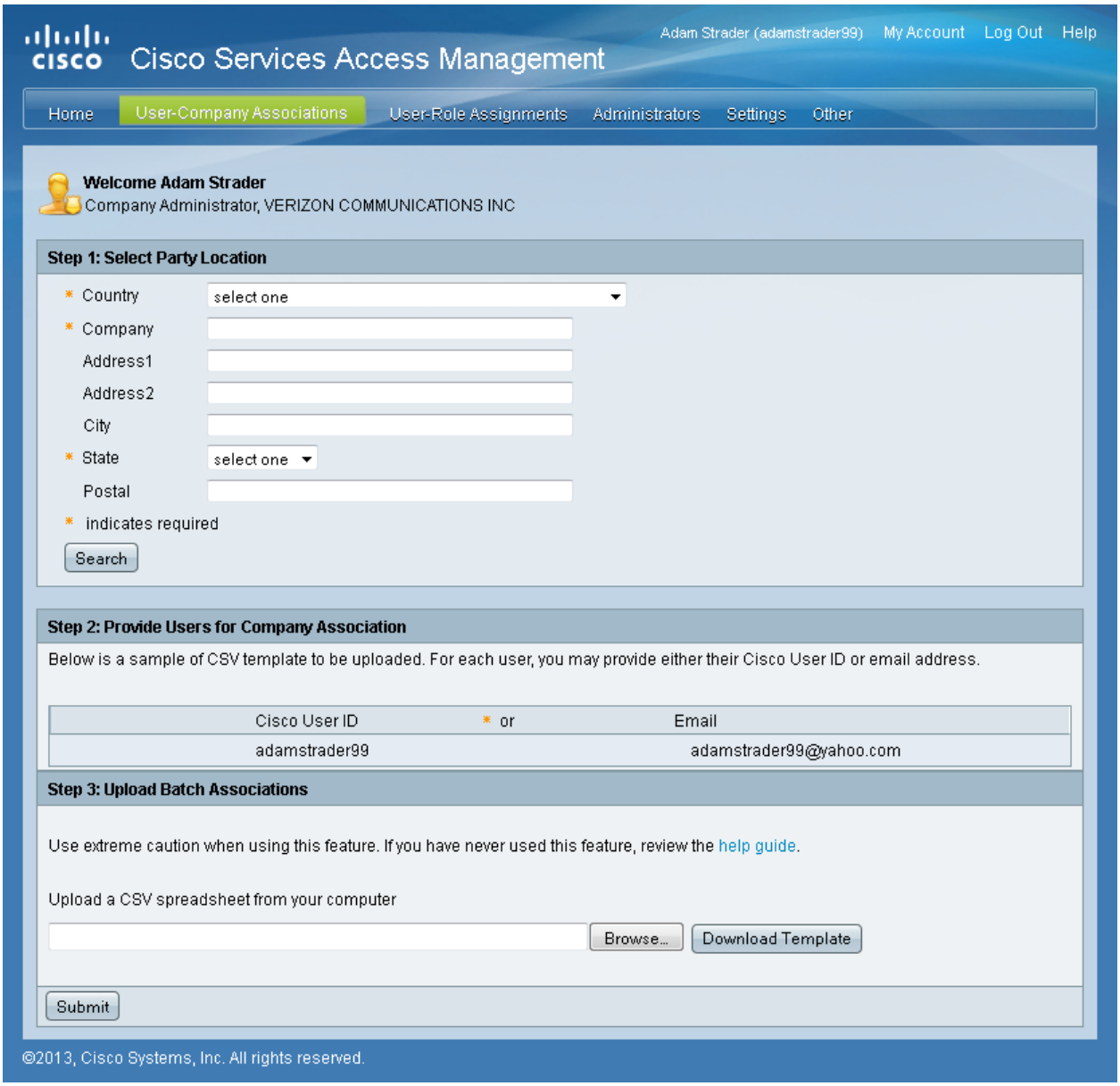
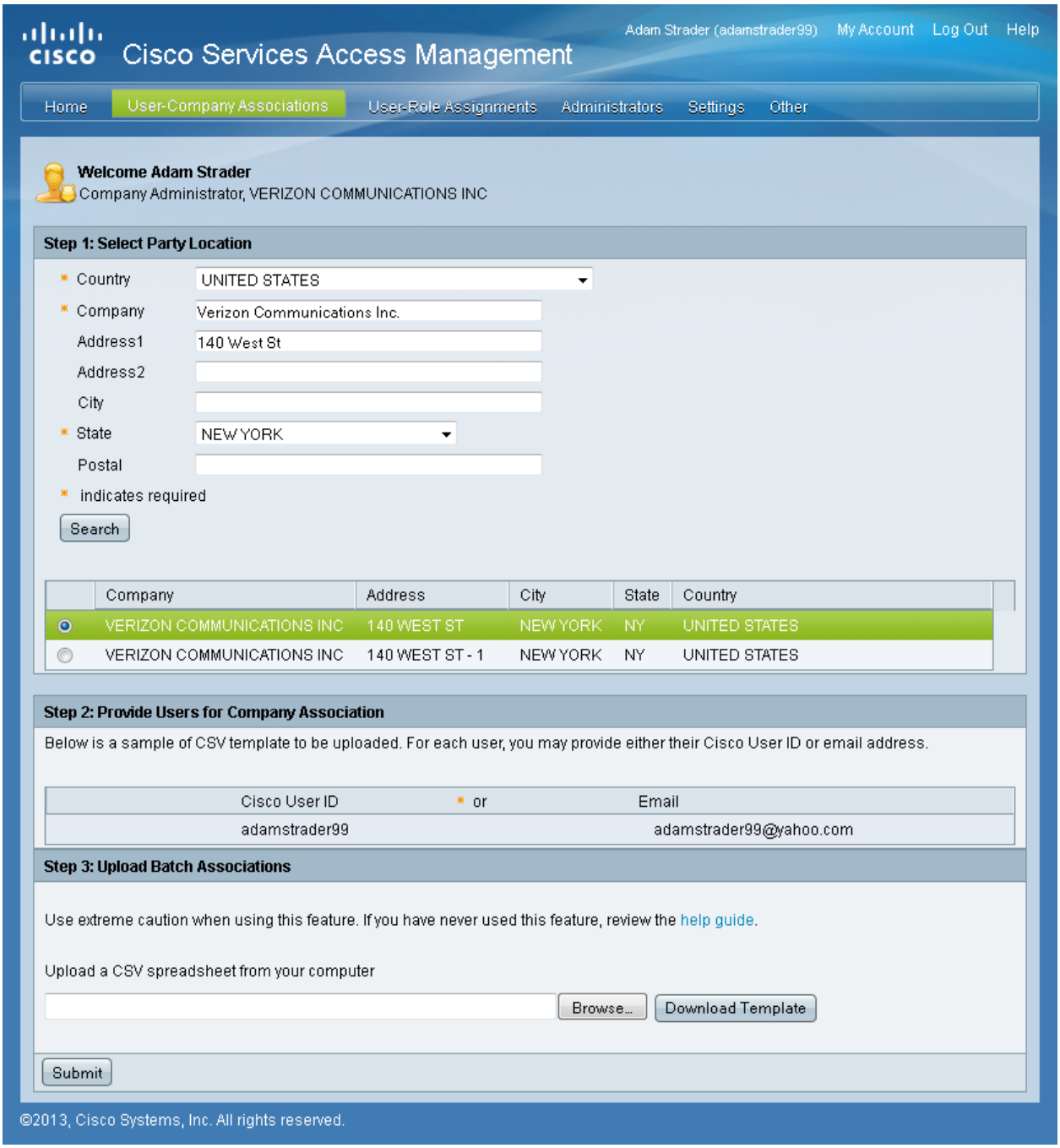
Performing User-Company association via batch upload

Instead of performing User-Company associations individually using the above step-by-step process, you can associate multiple users through a batch upload, using a provided spreadsheet template. This feature may be especially useful to on-board or migrate users from another system or user repository.

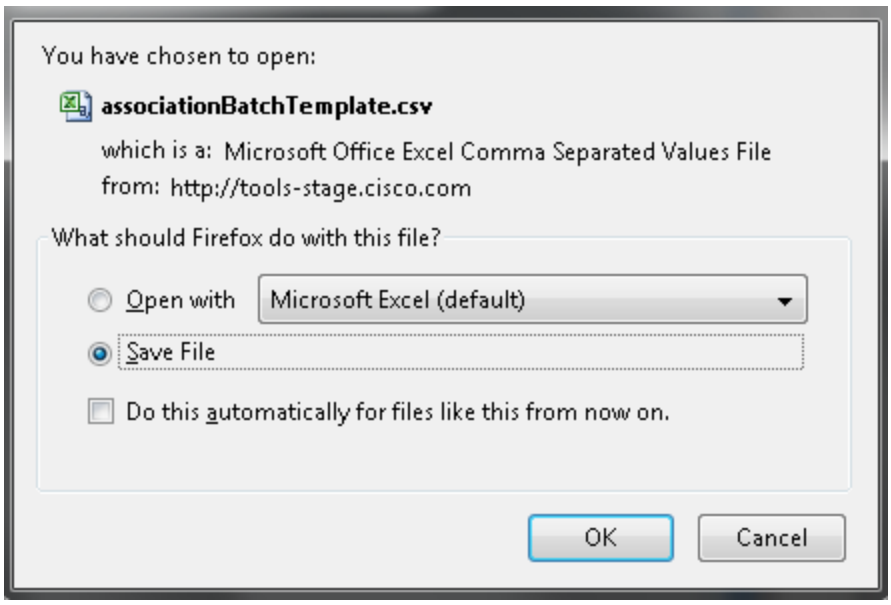
Use the top menus to navigate to "User-Company Associations → Batch Upload"



Enter details to search for the company location to which you want the list of users to be associated. Select from list available.

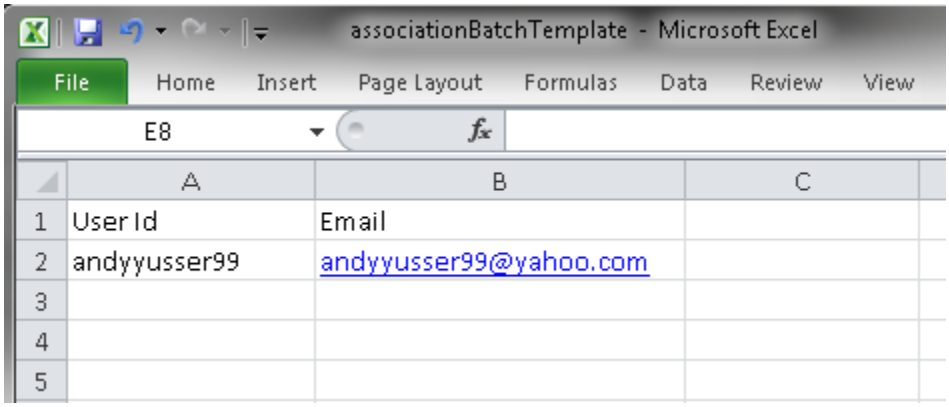


You will need to initially download the template for batch upload. Save this file as "associationBatchTemplate.csv". This file can be re-used each time you need to associate multiple users to your company by updating the details of users in the file.

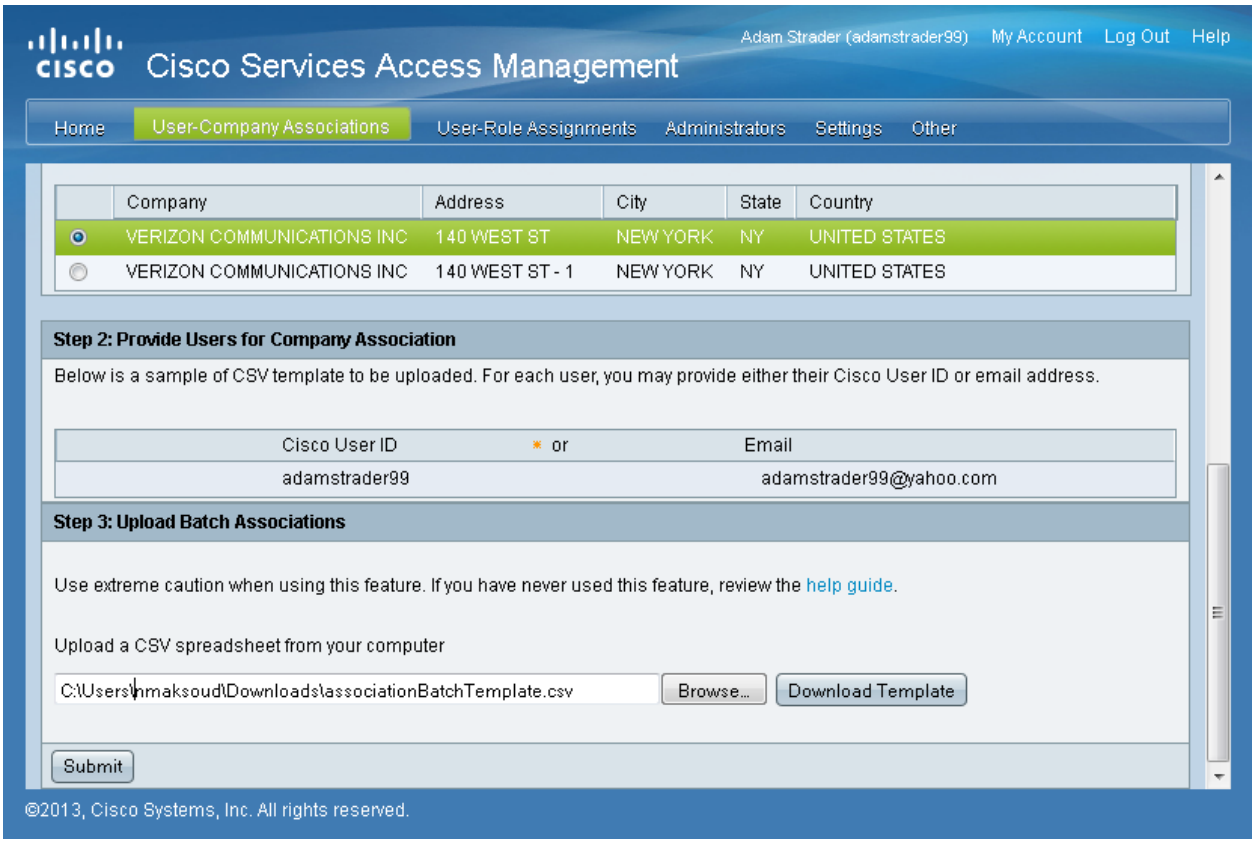


Open this saved file, and enter the user details as required.

Any change to the file type, format, or column headers will result in an error during the user-company association upload.



Upload this locally saved file, with the required user details click on “Submit”.



A confirmation screen is displayed. If there was an error in associating users, the list of users that were not associated will be displayed along with the error message and reason.

Users associated successfully to your company will be notified via email that their Cisco Account has been associated to your company. Once submitted the batch takes about 15 minutes to be loaded into the system as the batch job synch up job runs every 15 minutes.

Dear Andy,

Your Cisco Account is now associated with the following location:

VERIZON COMMUNICATIONS INC.
140 WEST ST .
NEW YORK, NY.
10007
US

You may now go to Cisco Profile Manager and request roles to upgrade access to your Cisco Account via the Additional Access tab.

If you have any questions about this change to your Cisco Account, please click the link below:

Contact Delegated Administrator

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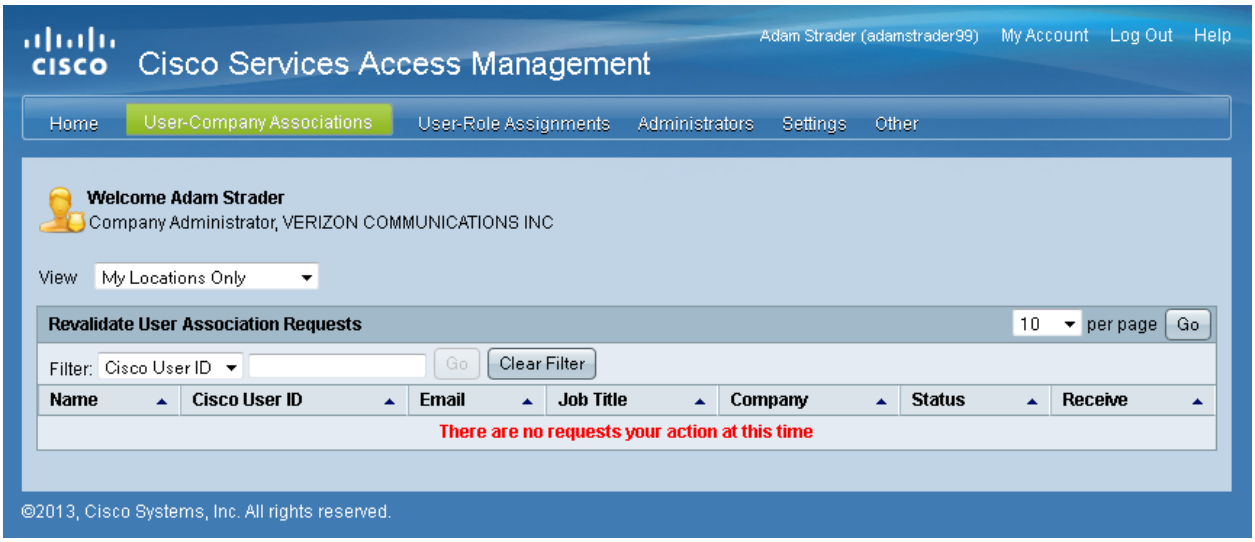
Revalidate User Association Requests

Revalidation of user associations may be necessary due to organizational changes your company's legal hierarchy. If there are any users associated with a company location that is affected by the organizational change, those users will automatically be moved to a new location and the delegated administrator will be notified to review and revalidate the those users' access.

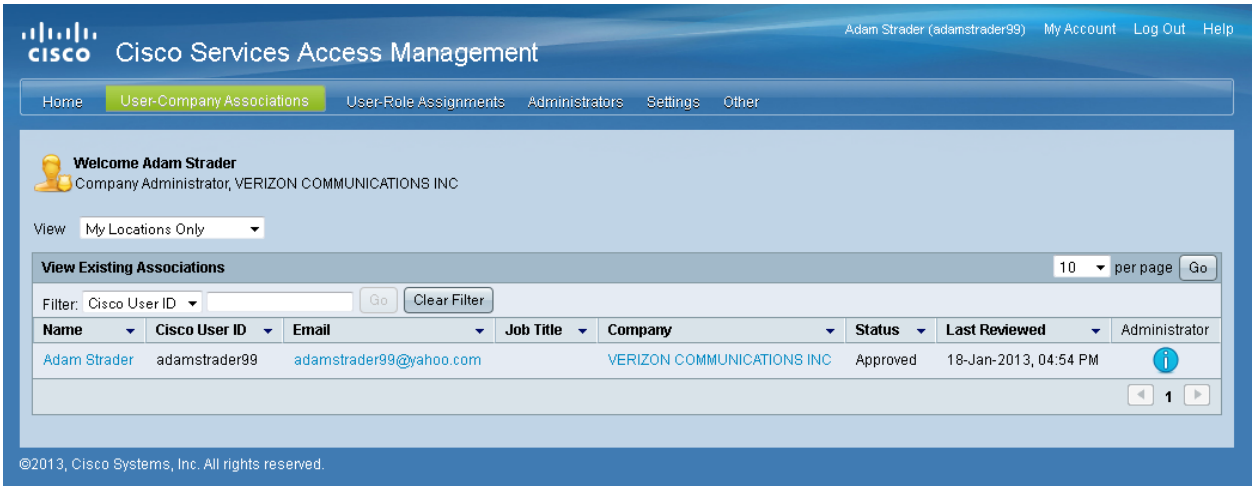
From the User-Company Associations menu, select Revalidate User Association Requests to view the pending requests queue.



View Existing Users Associated with the Company

Delegated Administrators can view the existing User-Company Associations.

By using the top menu options to navigate to "User-Company Associations → View Existing Associations", you will see a tabular display of all the users associated with your company.



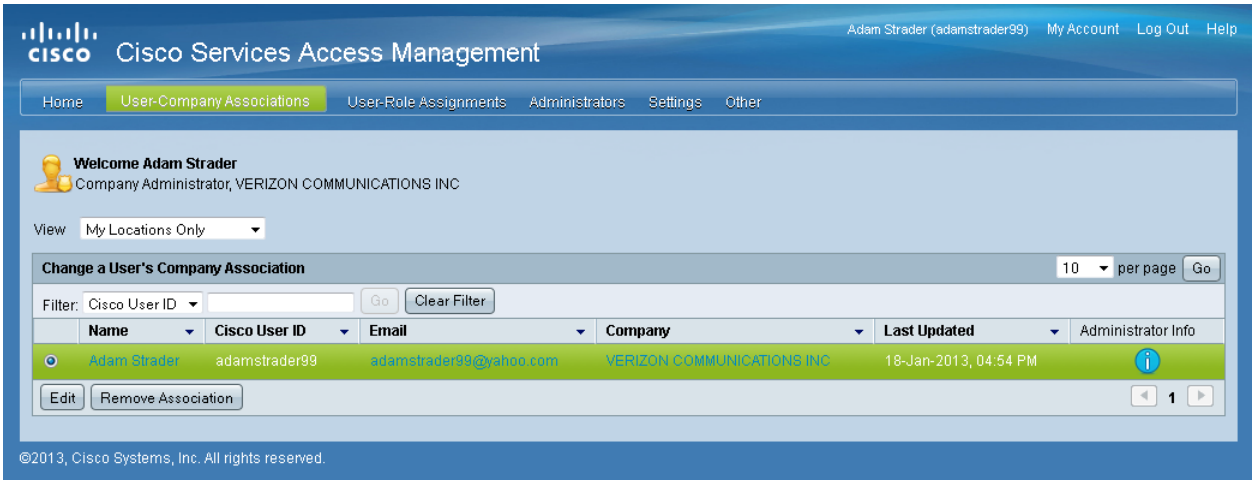
Edit Existing User-Company Associations

A Delegated Administrator can change an existing User's company association. This may be required if a user has left the company, changes locations, or no longer requires the previously provided access.

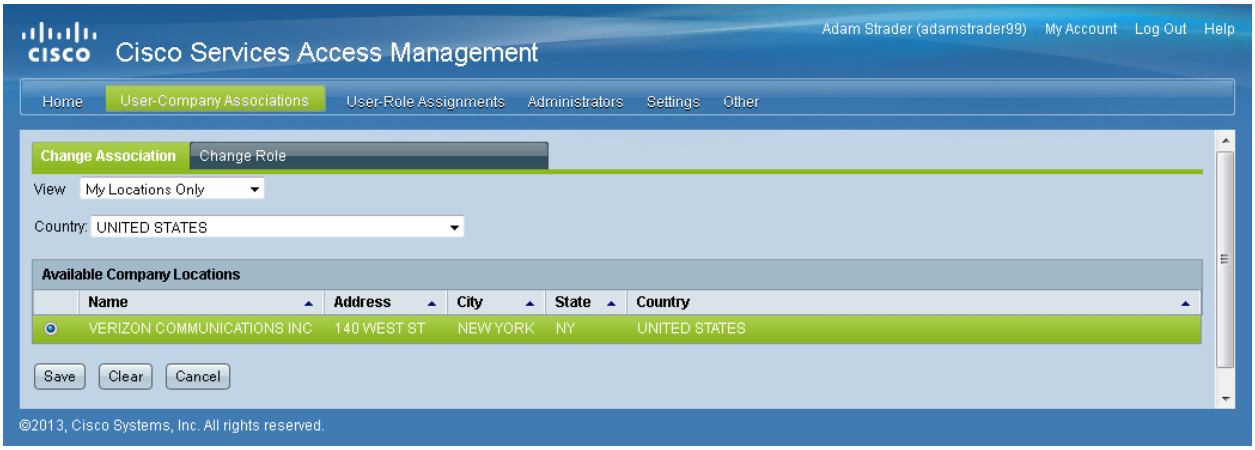
Use the top menus to go to “User-Company Associations → Change a User’s Company Association”. A tabular display of all users associated with your company will be displayed. Select a user by clicking on the radio button and click on “Edit” or “Remove Association”.

If the list is large, you will be able to narrow the list by using the “Filter” option based user id, first name, and last name or by clicking on the headers of the table displayed.

Click on “Edit” to change the selected user’s company association.

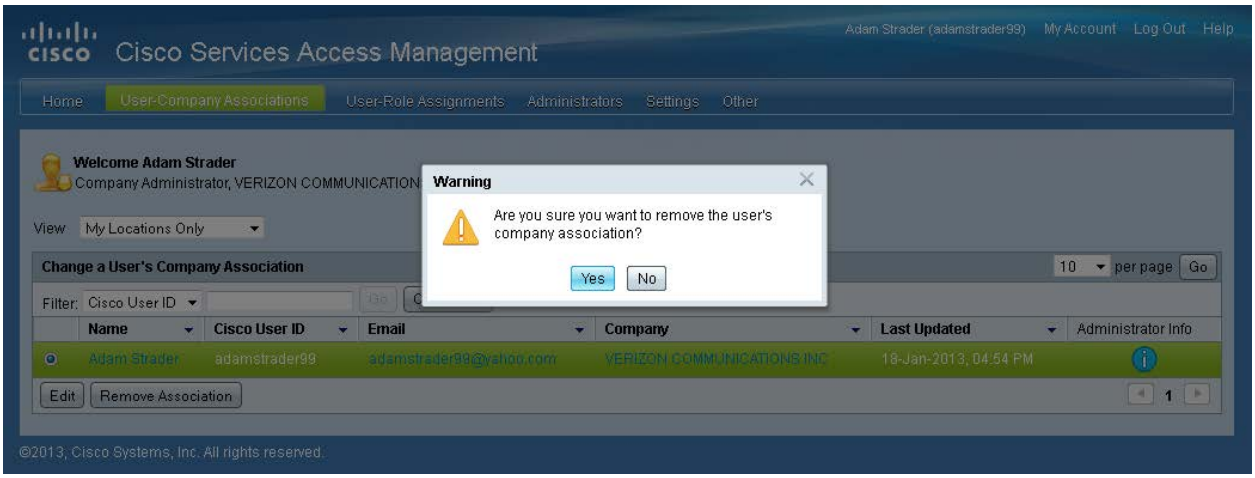


By default, the company location with which this user is associated will be selected. You will be able to select a different company location by selecting “My Full Span of Control” to view available company locations.



Alternatively, to disassociate a user from your company, select “Remove Association” in the first screen. A pop-up will be displayed to confirm your decision to remove selected user’s association to your company. Click on “Yes” to confirm deletion of this user-company association.

Disassociating a user from your company will also result in the deletion of all roles assigned to that user.



A confirmation message is displayed and the user will be notified via email about the changes to his/her Cisco Account.

Delegated Administrators of the company will also receive email notifications, based on their notification settings, about changes made to the user's company association.

User role assignment and management

Roles need to be assigned to the users associated to your company to define the access level for that user to a protected Cisco Service.

This may be done in multiple ways:

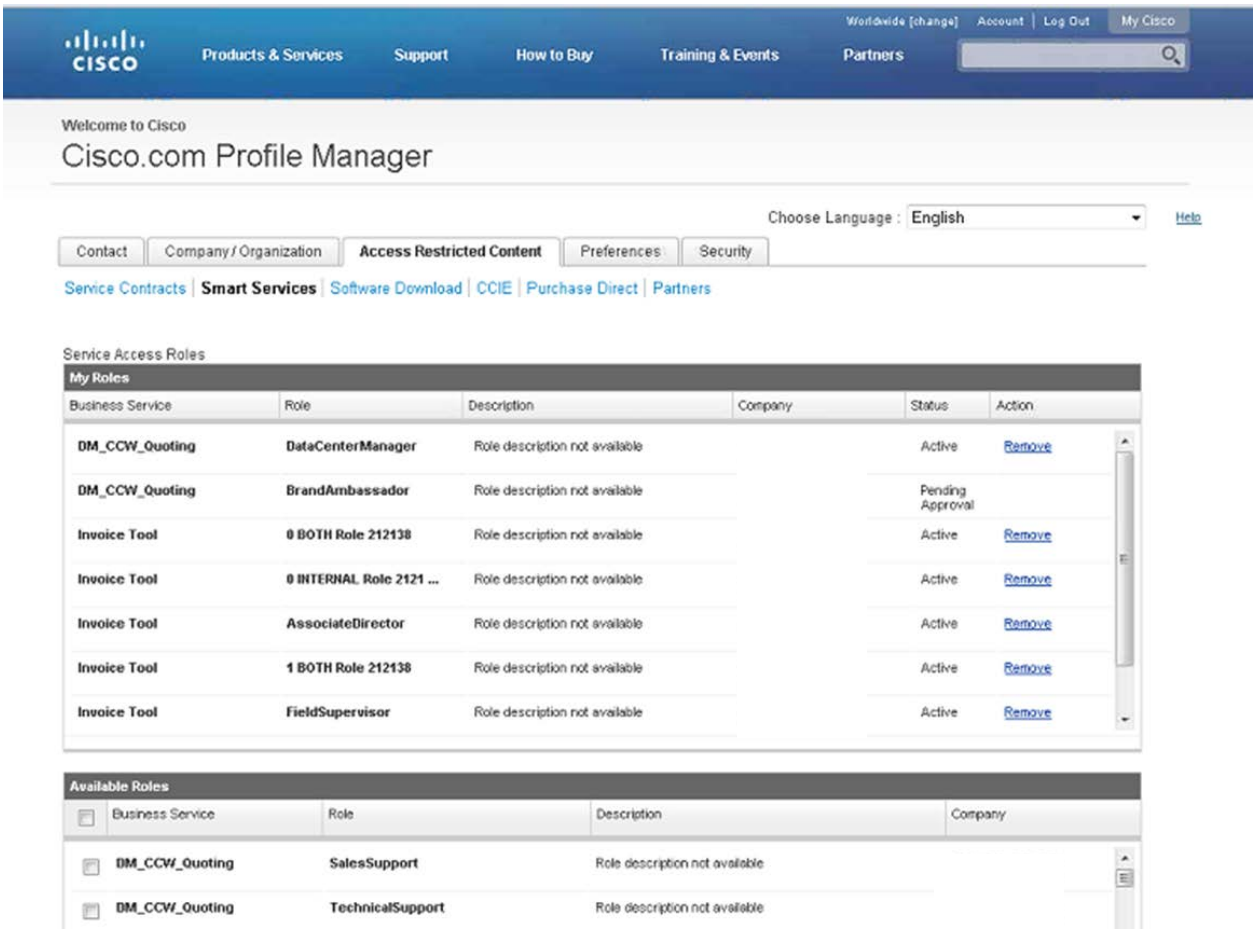
- Company administrator assigns roles to associated users
- Users request additional access to Cisco Services via Profile Manager

Note: Some Business offers will need to assign roles to end customer. Please refer to the appendix C for details.

User requests for role access using Profile Manager

Only the users associated to your company will be able to request additional roles via Profile Manager.

A user can request role assignment by clicking on the “Smart Services” link under the “Access Restricted Content” tab in Cisco.com Profile Manager. The second functionality, to request role assignment, is available in Production.



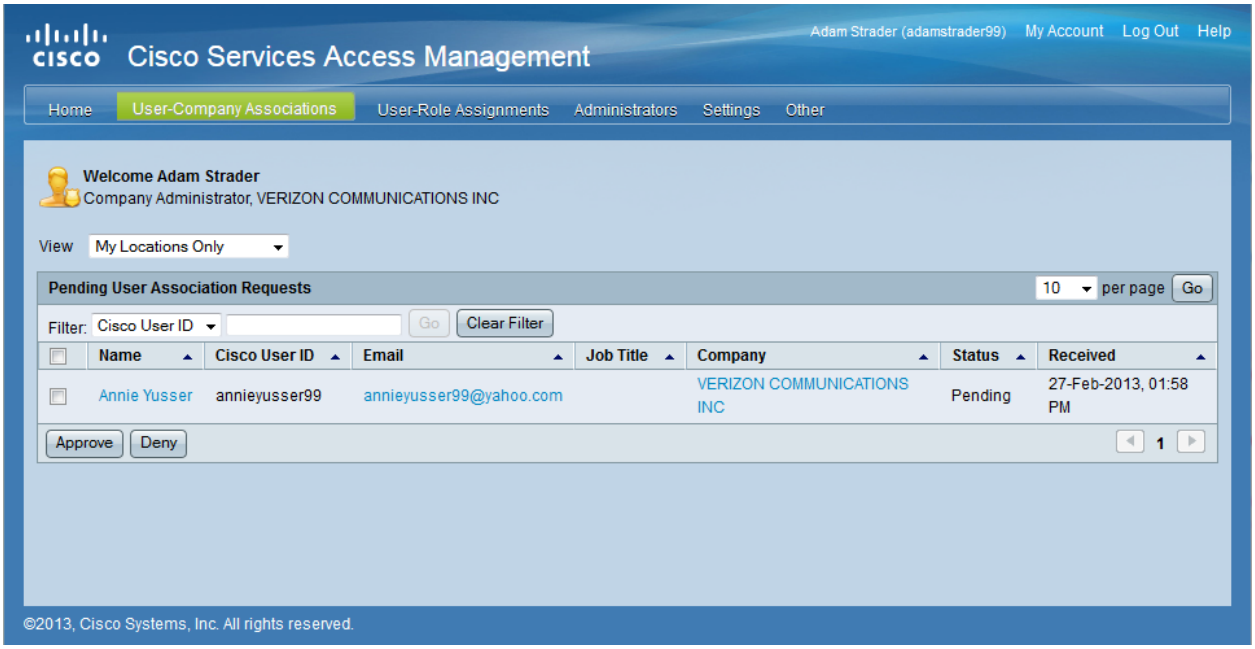
The top section of the page displays the user's existing role assignments. The bottom section displays additional roles available to the user's company, which they can request. Upon successful submission, a confirmation message is displayed.

The Delegated Administrator(s) of the user's company will be notified about the user's request for additional role access via email, based on their notification settings.

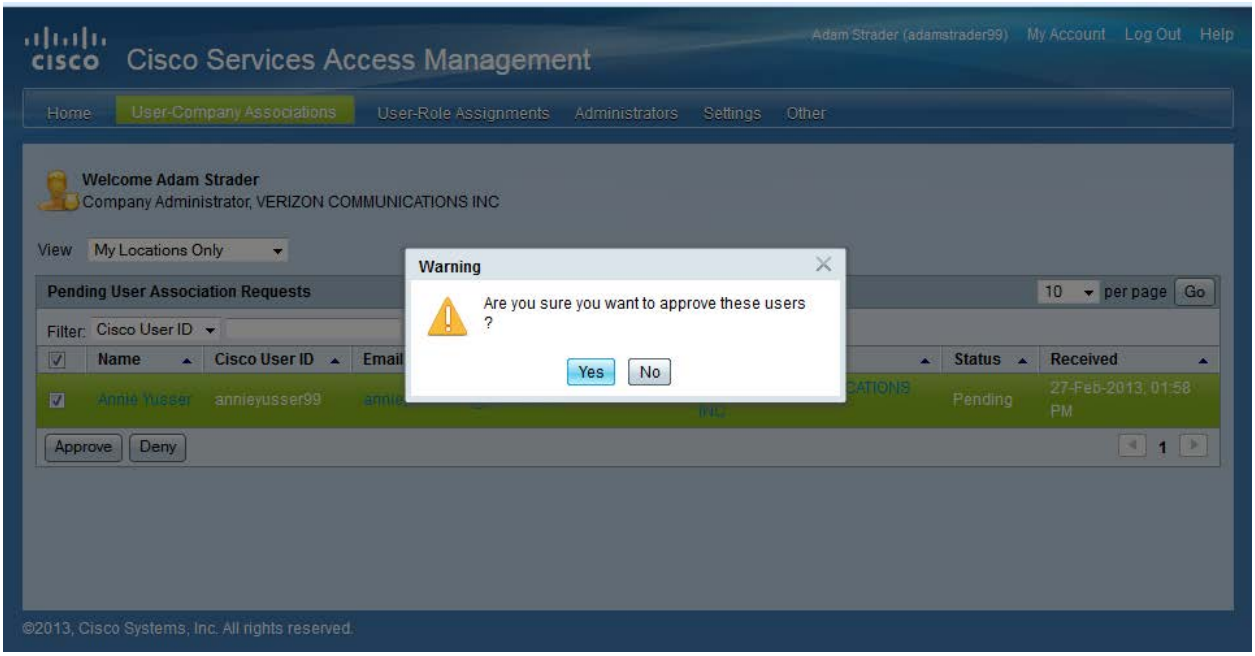
Managing user role assignment requests

User requests for access to Cisco Services can be approved or denied by the company Delegated Administrator(s) using Cisco Services Access Management.

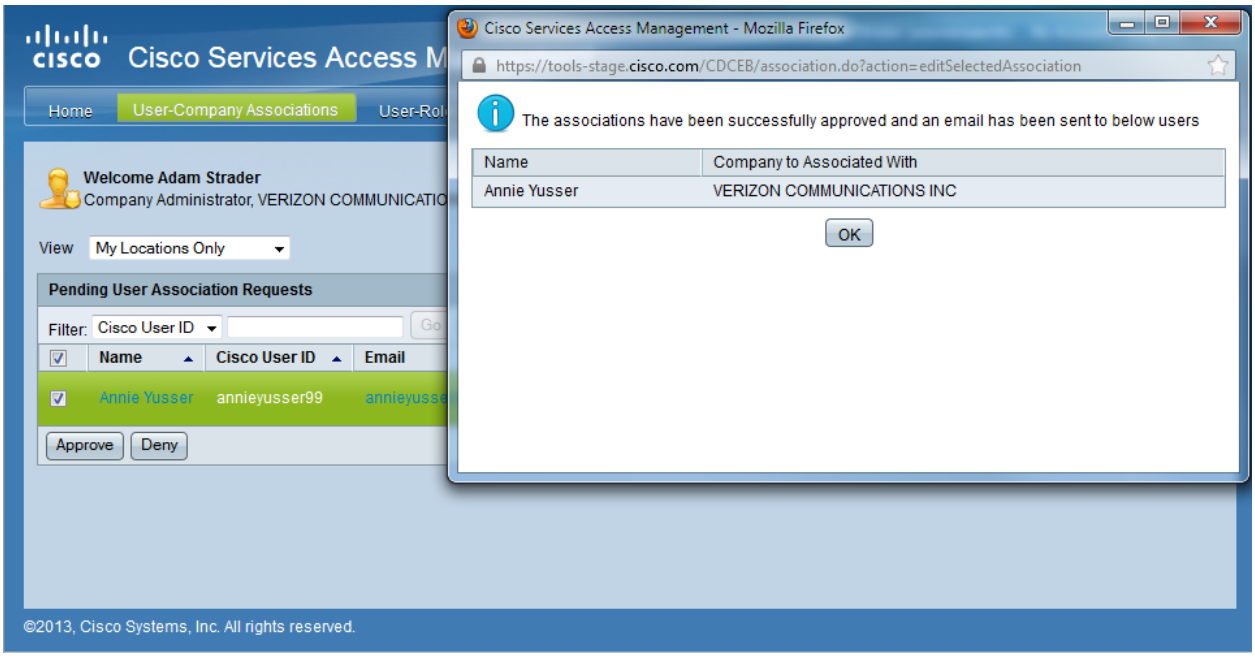
Use the top menus to navigate to “User-Role Assignment →Pending User-Role Assignment” to view a list of pending user requests for role assignment.



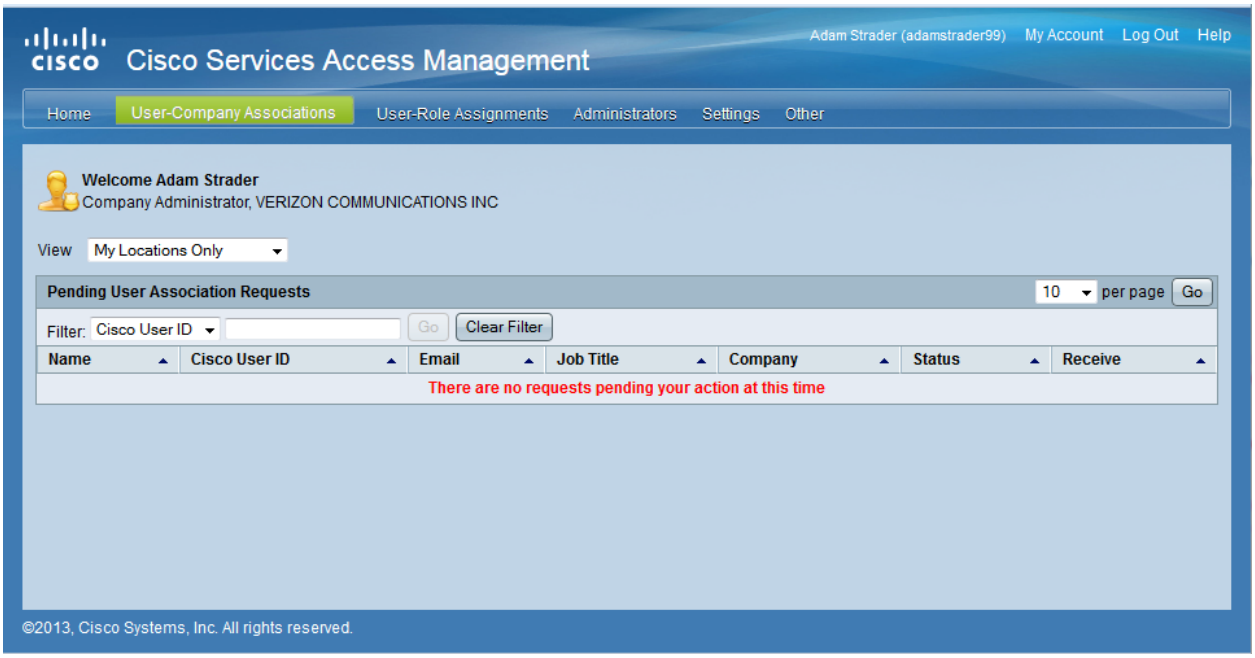
Select the requests to approve/deny from the list of displayed. Click on “Approve” or “Deny”.



A confirmation message is displayed based on the requested action.



Approved/denied requests are removed from the administrator's request queue.



User role assignment using Cisco Services Access Management

*If you had answered "Yes" to assign roles to the user you had just associated to your company, you can skip to "**Step 2: Select** Role" on the next page.*

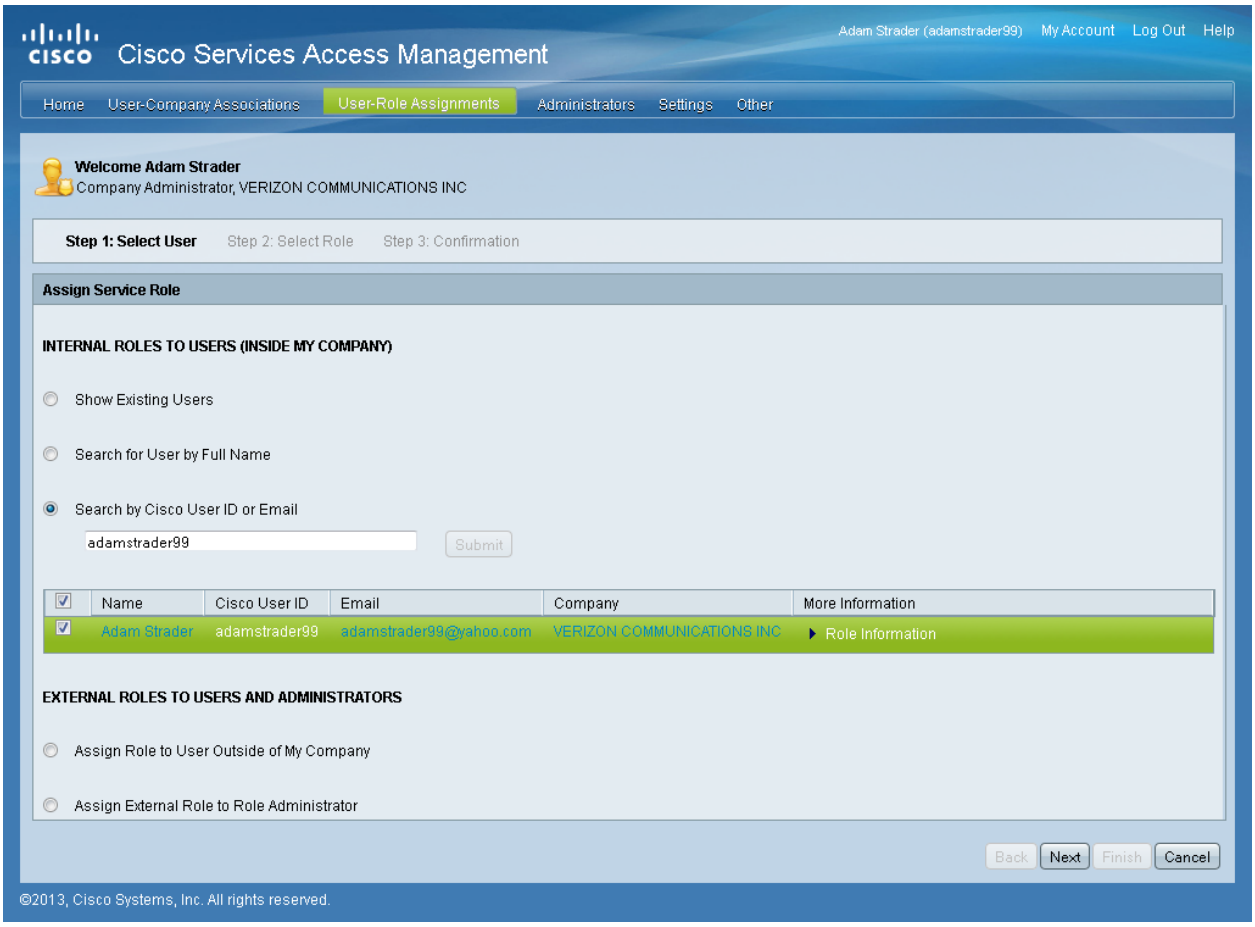
To assign a role to a user previously associated to your company, use the top menus to navigate to "User-Role Assignments→ Assign Roles to Users".

Step 1: Select User

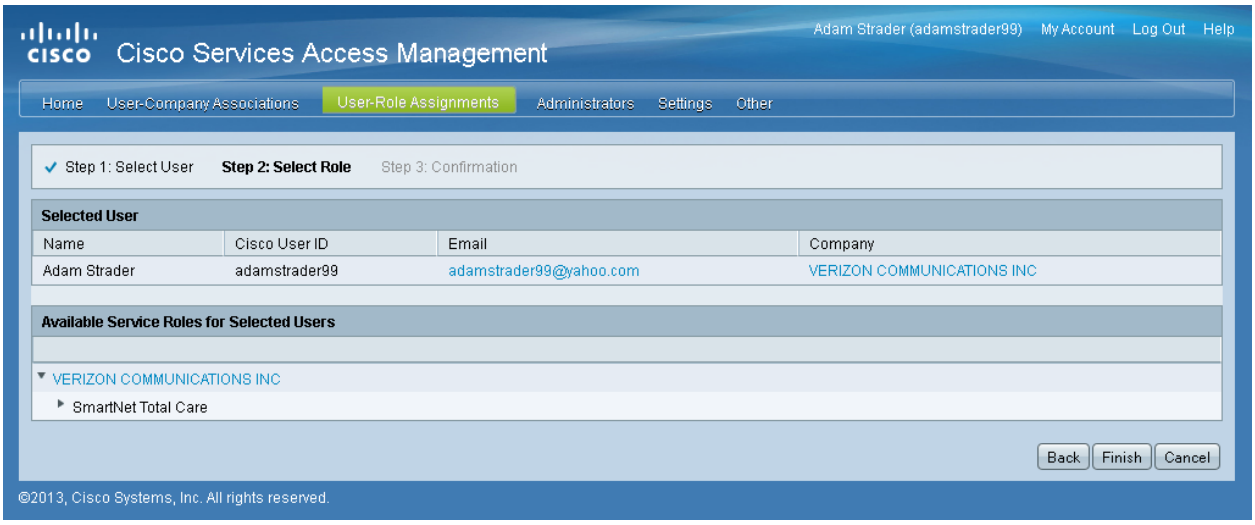
Choose the appropriate radio-button option, to either:

- Select from a list of existing users
- Search by first/last name
- Search by Cisco User ID or Email address

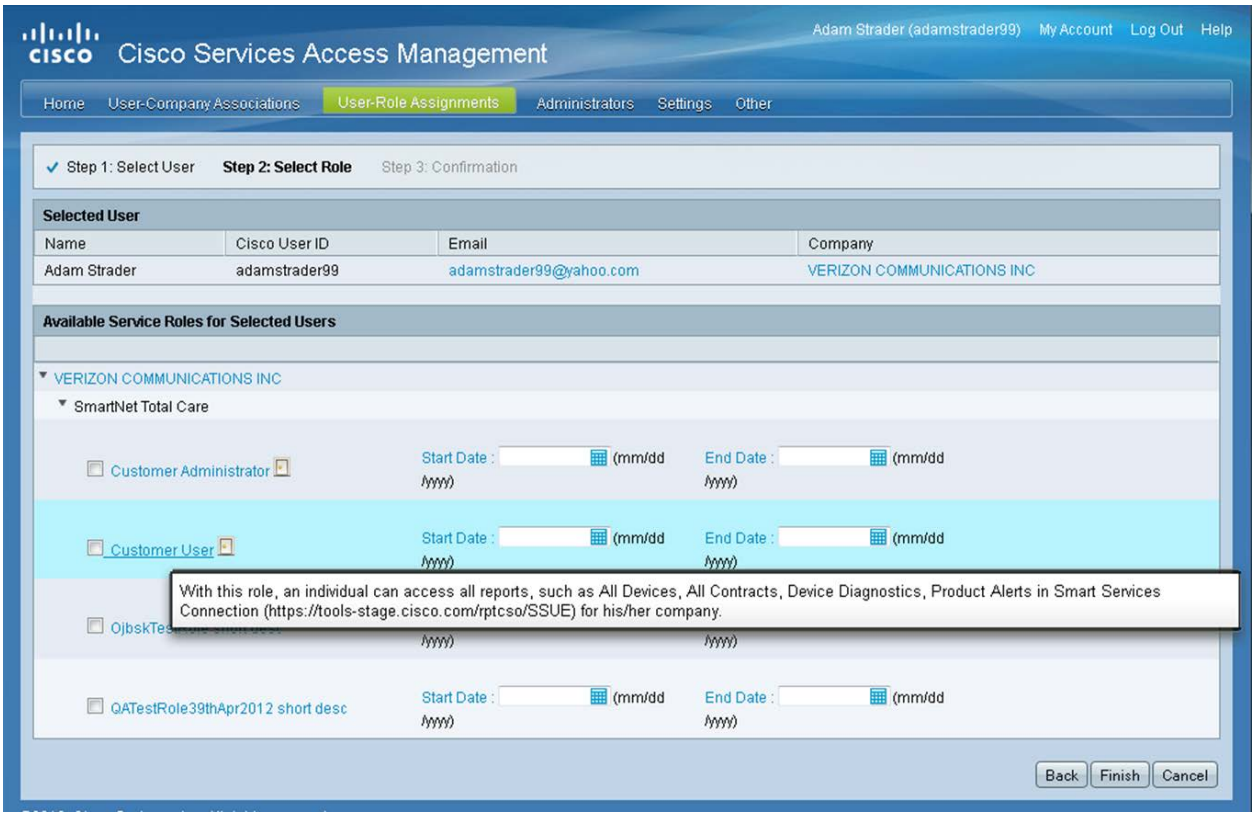
Based on your choice, the system will display a list of users. Select the user to be associated, and click on "Next"



Step 2: Select Role - Click on the ▶ icon next to display the list of available roles.



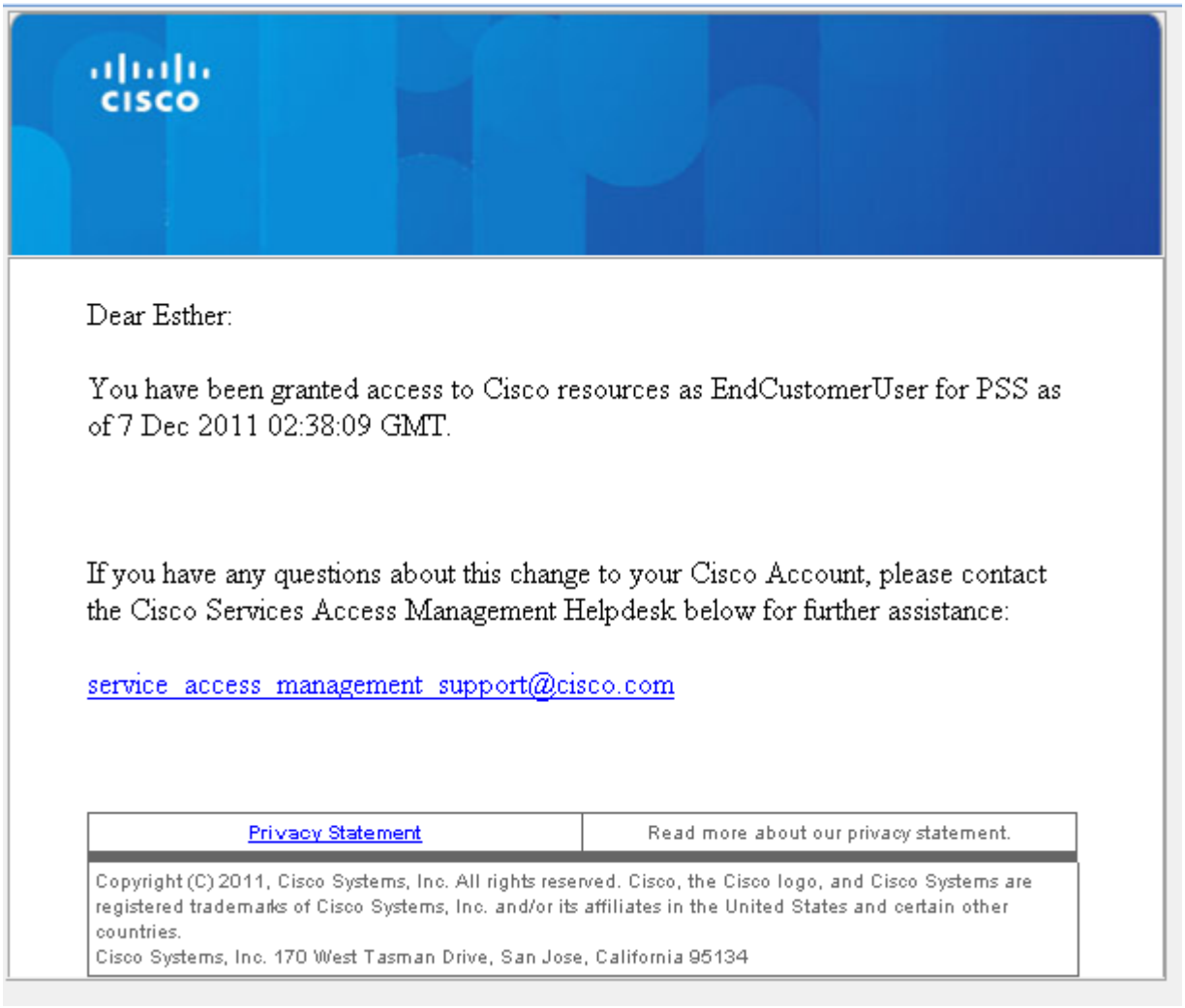
You can hover your mouse over a role to display a more detailed description of the role and its capabilities, as illustrated below:



Use the checkboxes to select one or more roles to assign to the selected user. You can optionally enter a future Start Date and/or End Date for the role assignment. If the Start Date is left blank, the role assignment will be active immediately. If the End Date is left blank, the role assignment will remain active indefinitely, until the company's service offer enablement expires.

Click the “Finish” button to complete the transaction. A confirmation message is displayed, confirming the successful assignment of role.

The user will receive an email notification, informing them that they have been grated the requested role assignment in your company.



Dear Esther:

You have been granted access to Cisco resources as EndCustomerUser for PSS as of 7 Dec 2011 02:38:09 GMT.

If you have any questions about this change to your Cisco Account, please contact the Cisco Services Access Management Helpdesk below for further assistance:

service_access_management_support@cisco.com

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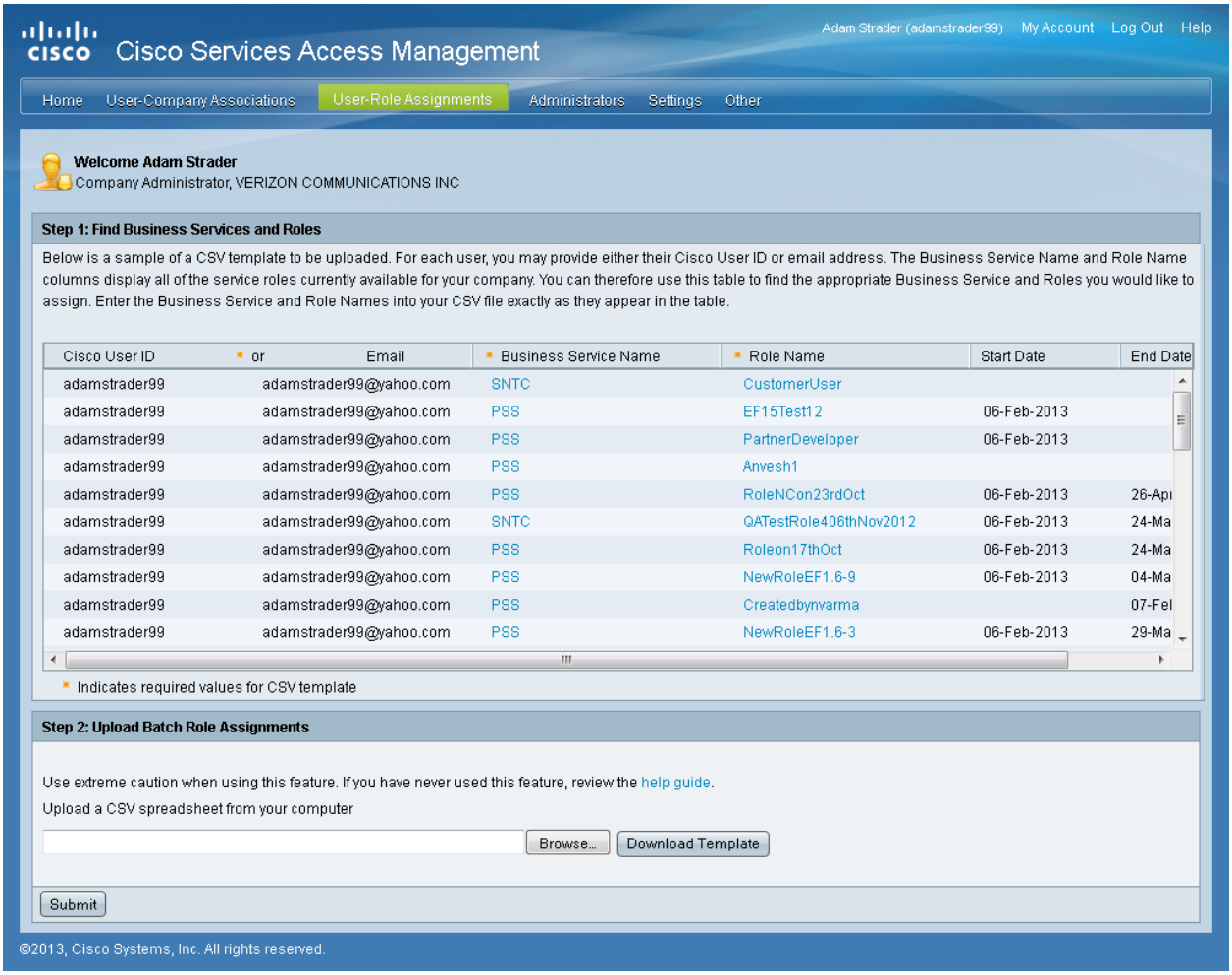
Note that some Cisco Services capabilities require further qualification of the role assignment. For example, a business partner user's access may be limited to specific end customer companies. This capability is described in Appendix A.

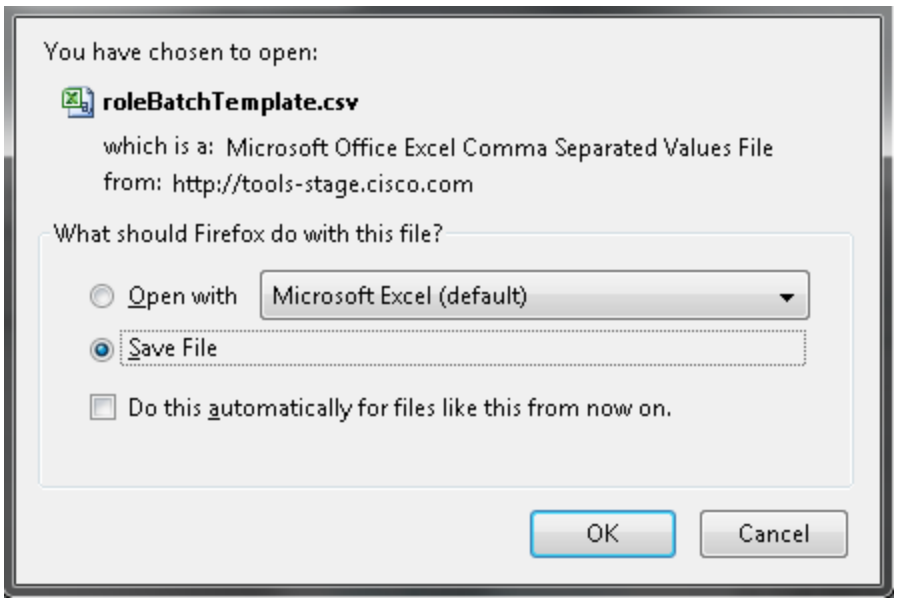
Performing User-Role assignment via batch upload

Instead of performing User-Role assignment individually using the above step-by-step process, you can associate multiple users to multiple roles through a batch upload, using a provided spreadsheet template. This feature may be especially useful to on-board or migrate users from another system or user repository.

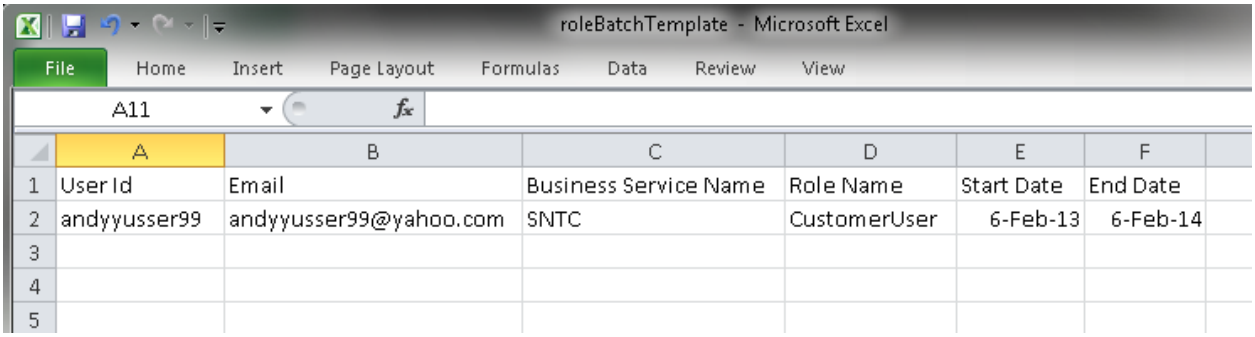
Use the top menus to navigate to “User-Role Assignments → Batch Upload”



You will need to initially download the template for batch upload. Save this file as “roleBatchTemplate.csv”. This file can be re-used each time you need to associate multiple users by updating the details of users in the file.

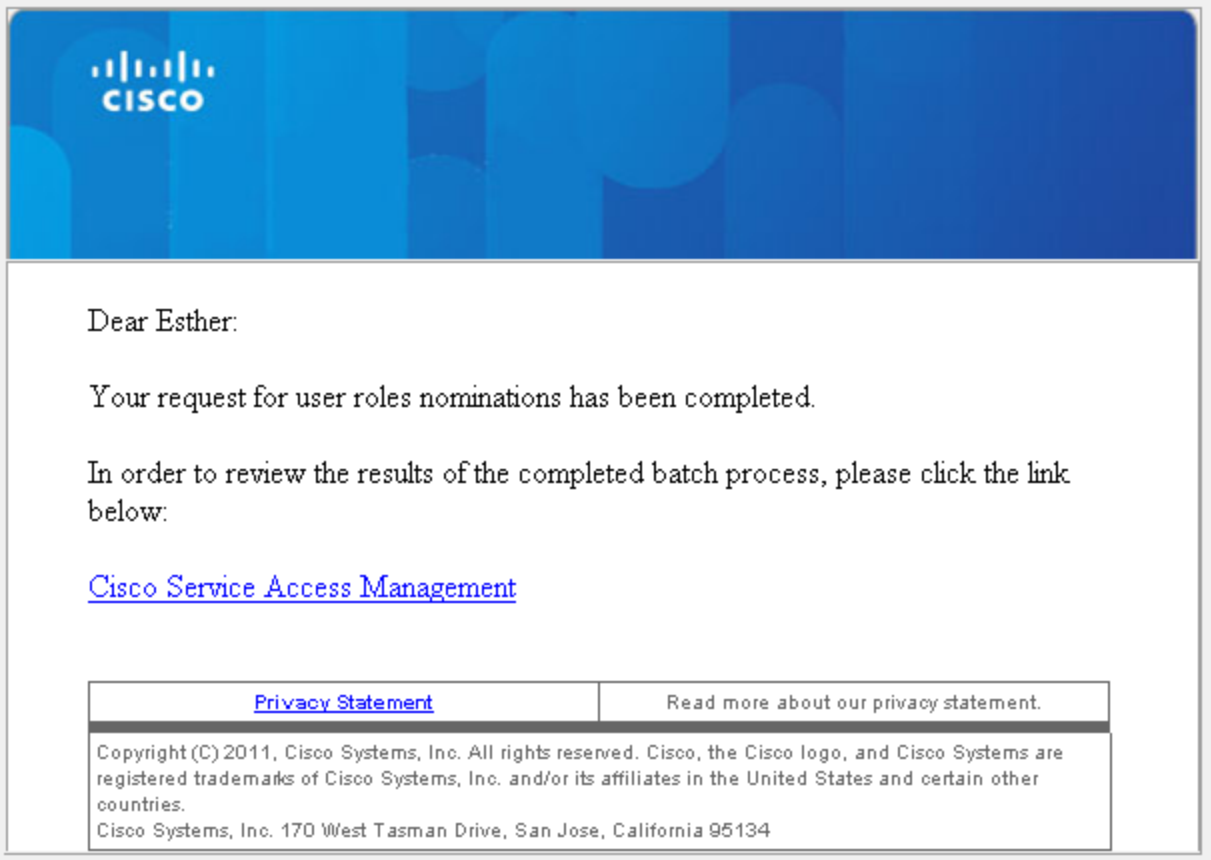


Open this saved file, and enter the user details as required.



After you have entered the data into the spreadsheet, save the file in an accessible location. Note that any change to the file type, format, or column headers will result in an error during the upload.

Click the “Browse” button to find the saved spreadsheet file, and click “Submit” to complete the upload. Once submitted the batch takes about 15 minutes to be loaded into the system as the batch job synch up job runs every 15 minutes.



Dear Esther:

Your request for user roles nominations has been completed.

In order to review the results of the completed batch process, please click the link below:

Cisco Service Access Management

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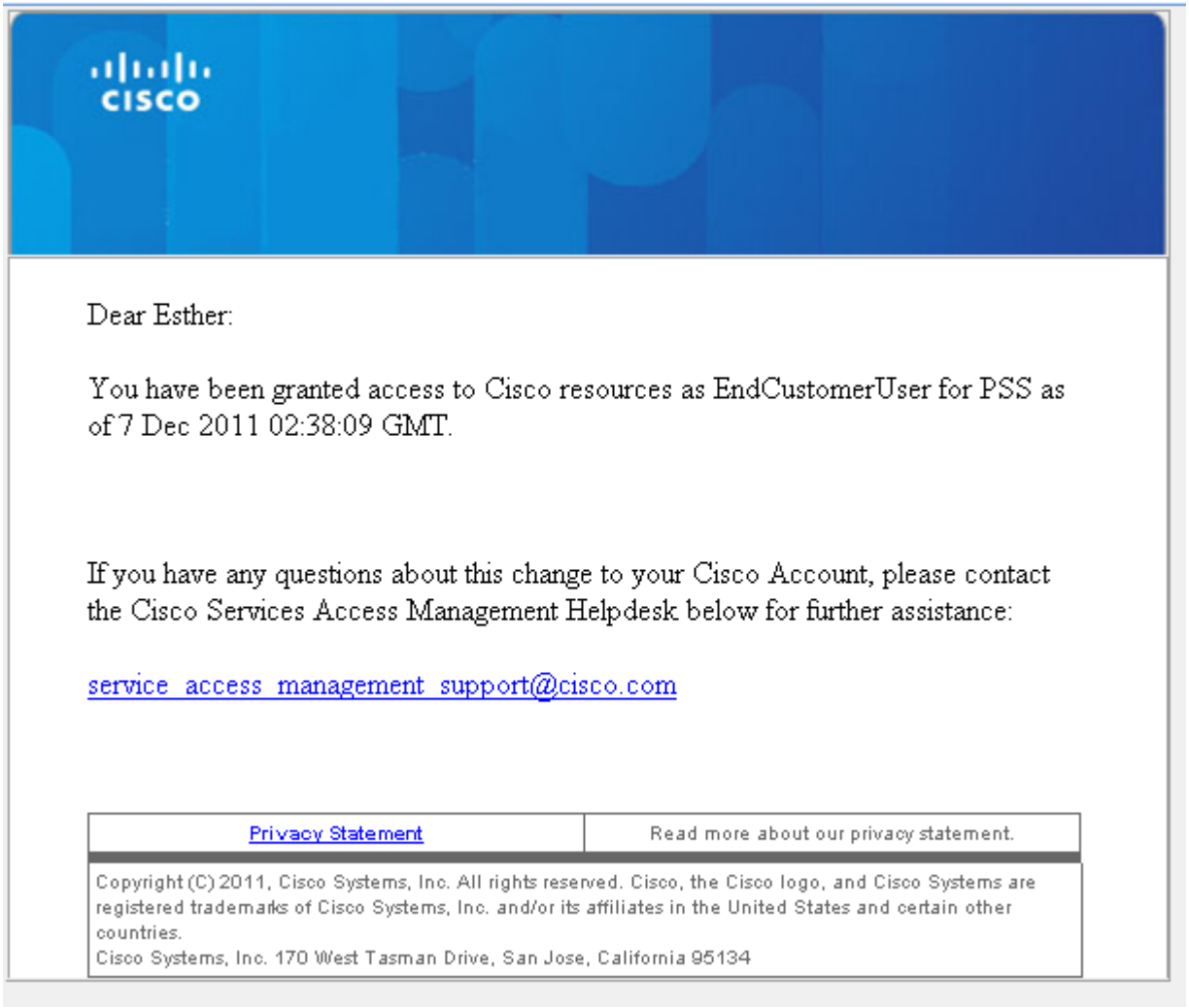
You will receive an email about the batch request with a link to check on the batch upload results. If there was an error in assigning roles, the list of users and the reason will be displayed.



Dear Esther:

You have been granted access to Cisco resources as EndCustomerUser for PSS as of 7 Dec 2011 02:38:09 GMT.

If you have any questions about this change to your Cisco Account, please contact the Cisco Services Access Management Helpdesk below for further assistance:

service_access_management_support@cisco.com

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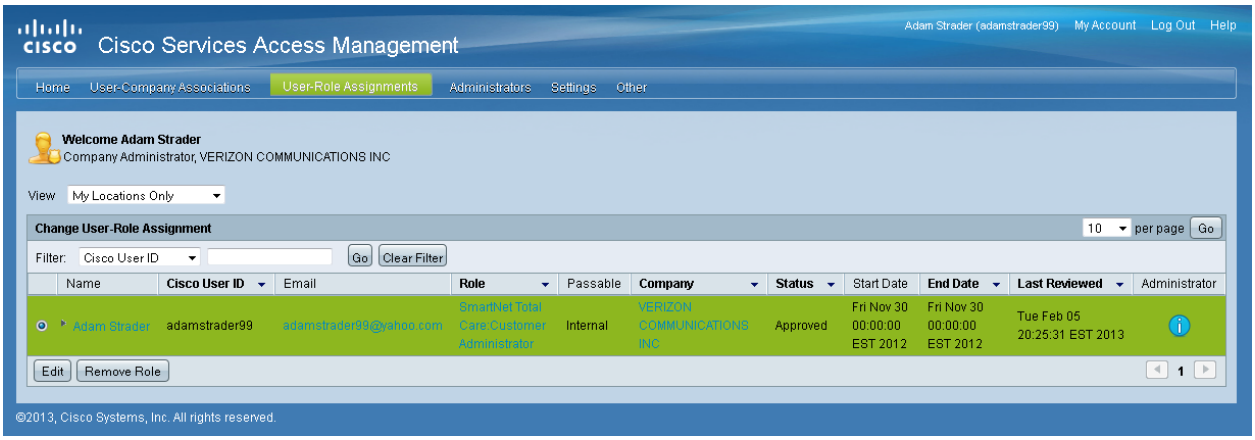
Users assigned successfully to the roles will be notified via email that they have been granted role.

Edit existing user role assignments

Delegated Administrators have the flexibility to change an existing user's role assignments. This may be required when the user no longer requires the access previously approved for them.

Use the top menus to navigate to "User-Role Assignments → Change a User's Role Assignments". A tabular list of all existing user role assignments for your company will be displayed. Use the filter to narrow the list displayed based on Cisco user id, first name, last name or by clicking on the headers of the table displayed.

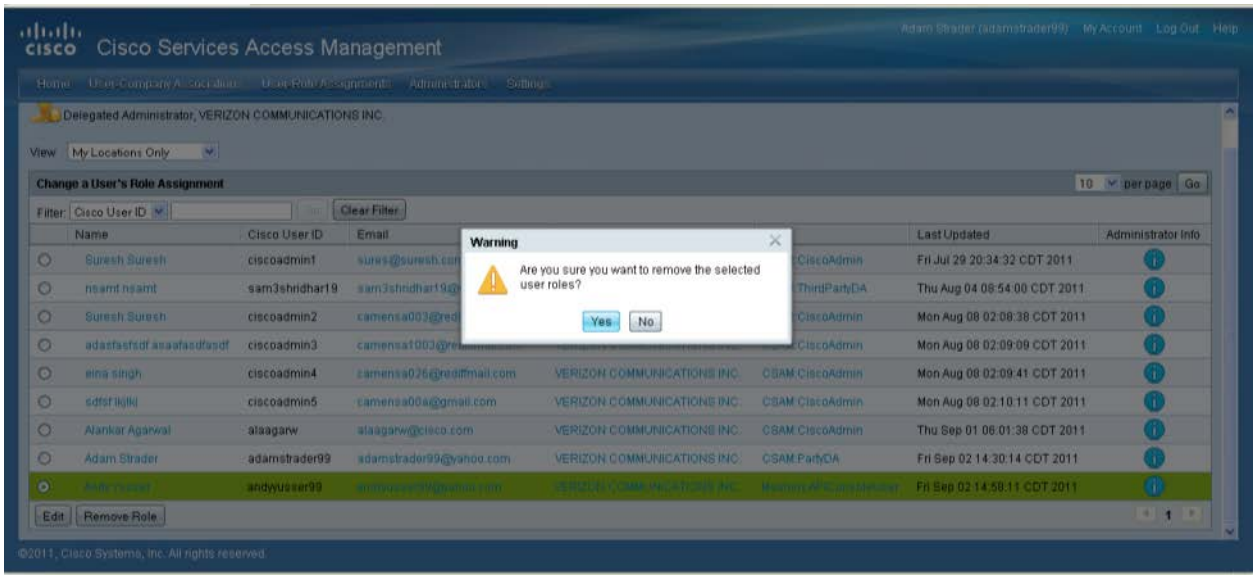
Click on the ▶ icon next to a user's Name to display all of their currently-assigned roles.



Use the radio button to select the user role assignment you want to modify. You can then either use the "Remove Role button to quickly inactivate the selected user role assignment, or use the "Edit" button to add, remove, or change all role assignments for the selected user. Each of these functions are further described in the sections below.

Remove Role

Click the "Remove Role" button to remove the currently-selected role assignment. A pop-up will be displayed to confirm this decision. Click on "Yes" to confirm the change, and a confirmation message is displayed.

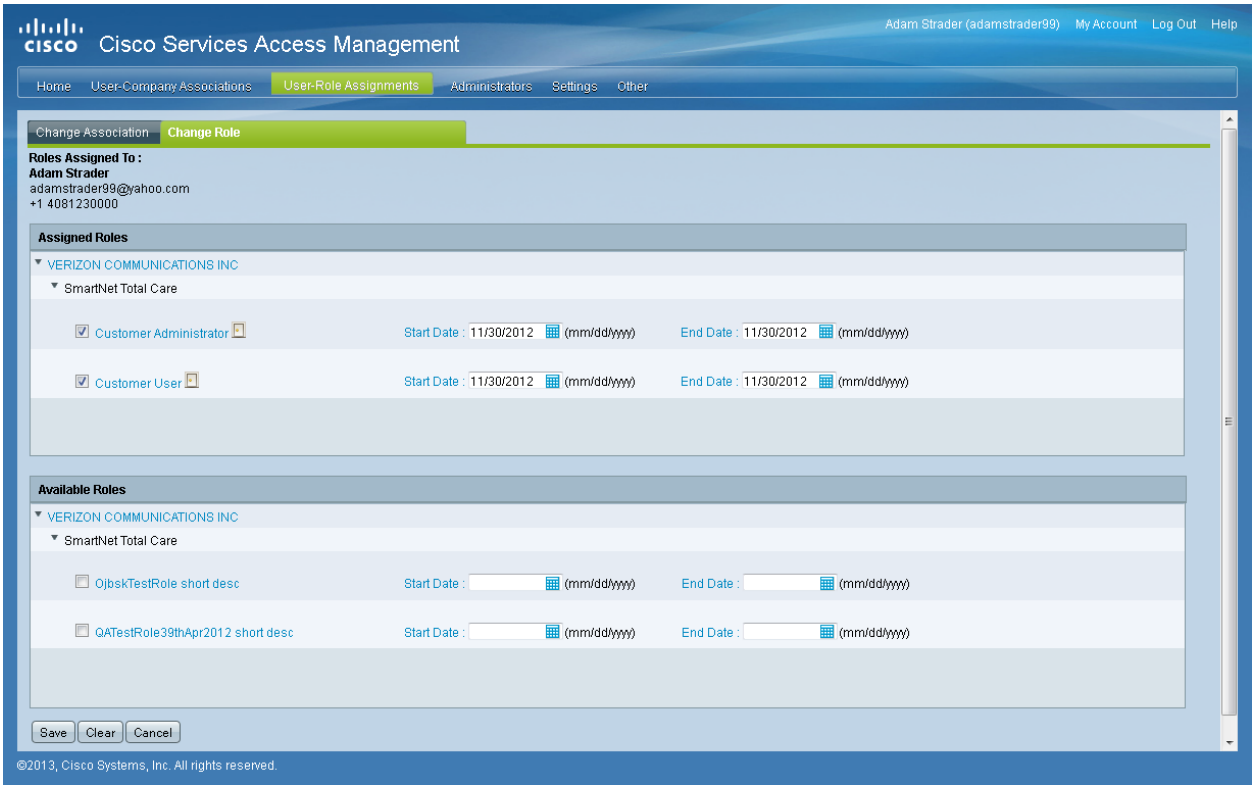


The user will be notified via email about the changes made to their account.

All Delegated Administrator(s) for your company will also be notified, based on their notification preferences, of the change made to the user role assignment.

Add, remove, and change assignments

Click the “Edit” button to add, remove, or change the Start Date and/or End Date of the selected user’s existing user role assignments.



You can un-check the checkbox next to an Assigned Role to remove that role assignment for this user.

You can add, change, or delete the Start Date and/or End Date of an Assigned Role. If the Start Date is blank, the role assignment will be immediately active. If the End Date is blank, the role assignment will remain active indefinitely, until the company’s service program enablement expires.

You can check a checkbox next to an Available Role to assign that new role to this user, and optionally enter a Start Date or End Date for the role assignment.

When you have finished making changes, click the “Save” button. A confirmation message is displayed.

The user will be notified via email about the changes made to their account.

All Delegated Administrator(s) for your company will also be notified, based on their notification preferences, of the change made to the user role assignment.

Delegated Administration

Delegated Administration allows you to independently decide and manage who in your company get access to which Cisco Service program. Depending on the size of your company or the number of users, you may choose to manage all user requests, or nominate additional company administrators to manage the load, allowing centralization or decentralization of administration according to your company's desired policy or needs. This administrative structure can be changed over time, based on growth and usage by additional service programs.

Nominating Additional Delegated Administrators

As the Delegated Administrator, you will be able to nominate additional Delegated Administrators for your company. All the nominated Delegated Administrators for a given company level will have the same roles and accesses. The additional administrators do not need to reset the company settings unless they have been nominated for a different location of the company.

Company Administrators can setup Company settings, approve/deny/make user-company associations, assign roles to users and establish preferences for receiving email notifications.

Role Administrators can only assign roles to users and establish preferences for receiving email notifications.

These two types are described below in detail.

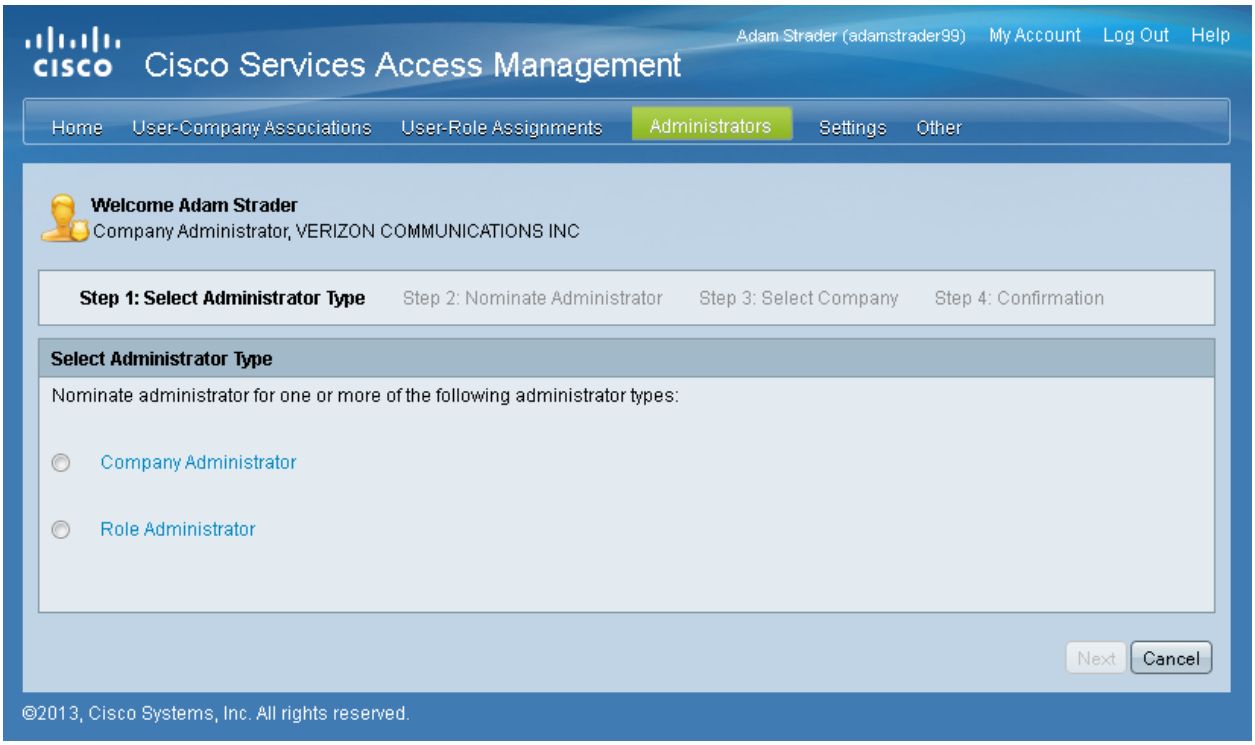
Company Administrator:

To nominate additional Delegated Administrators for your company, use the top menus to navigate to "Administrators → Nominate an Administrator".

Step 1: Select Administrator Type

Choose the appropriate radio-button option, to either nominate:

- **Company Administrator**
- **Role Administrator**

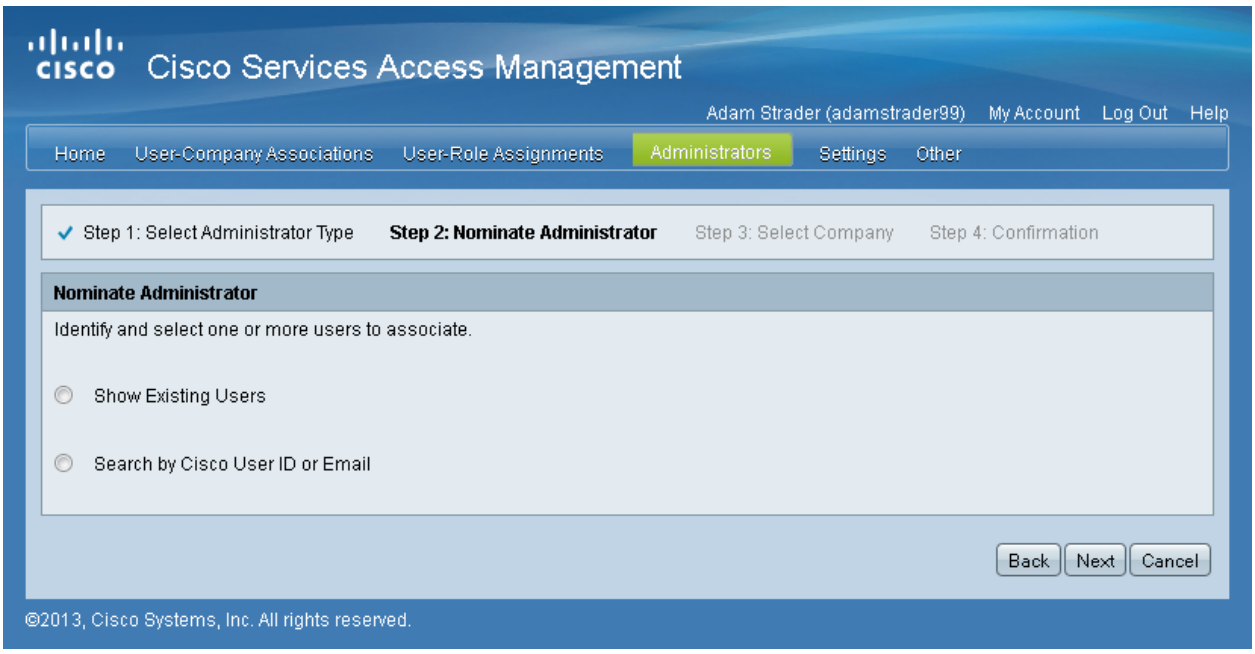


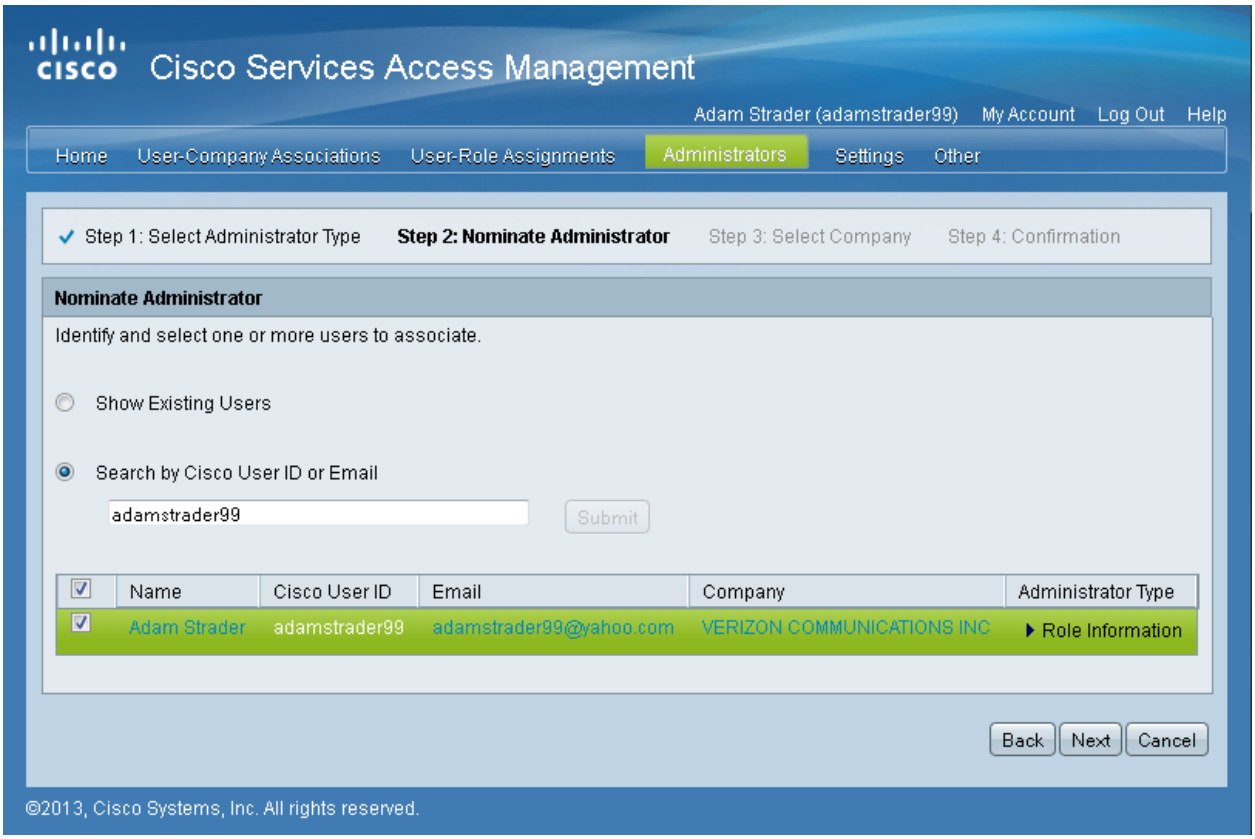
Step 2: Nominate Administrator

Choose the appropriate radio-button option, to either:

- Show existing users
- Search by Cisco User ID or Email address

Based on your choice, the system will display a list of users. Select the user to be nominated, and click on "Next"

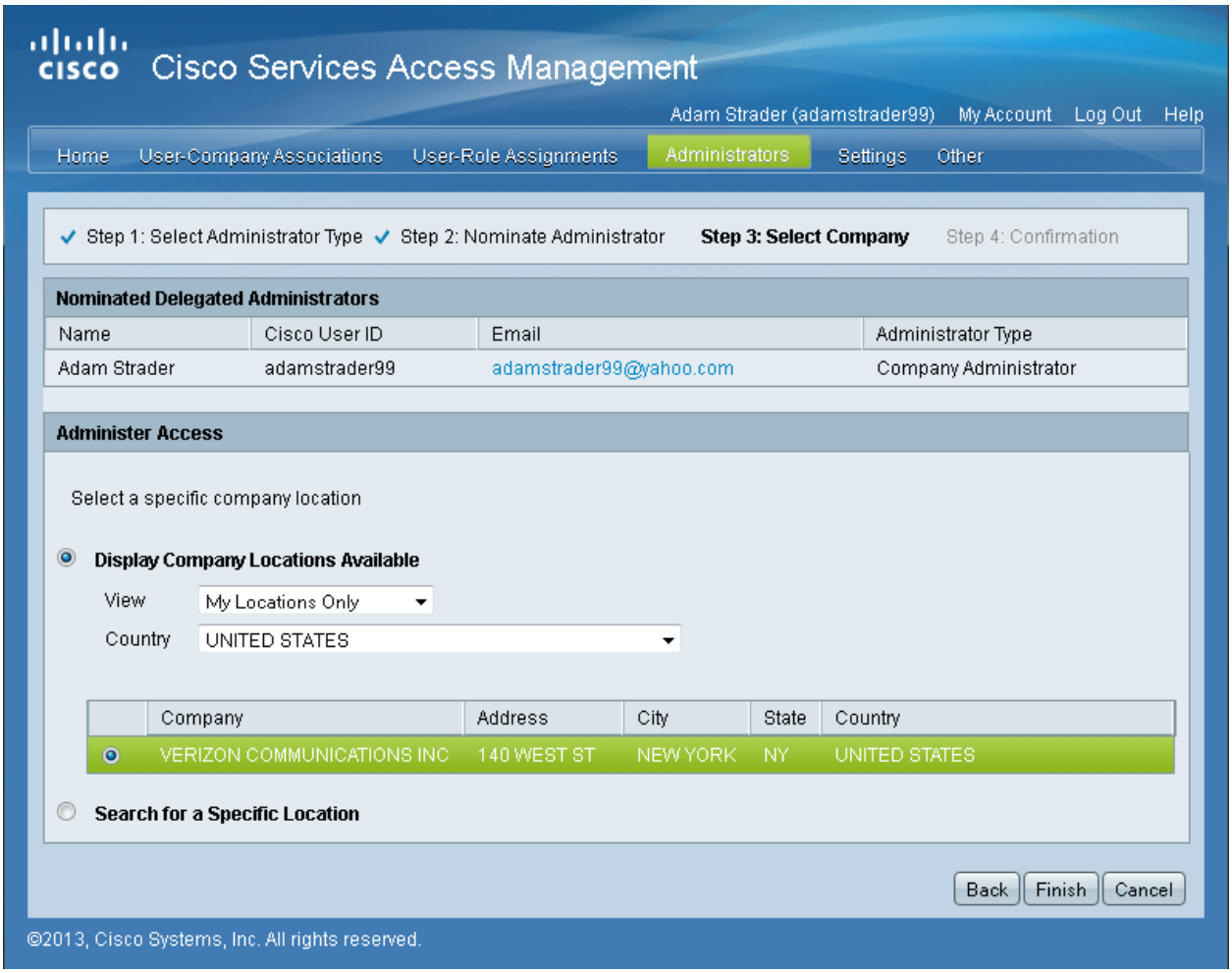




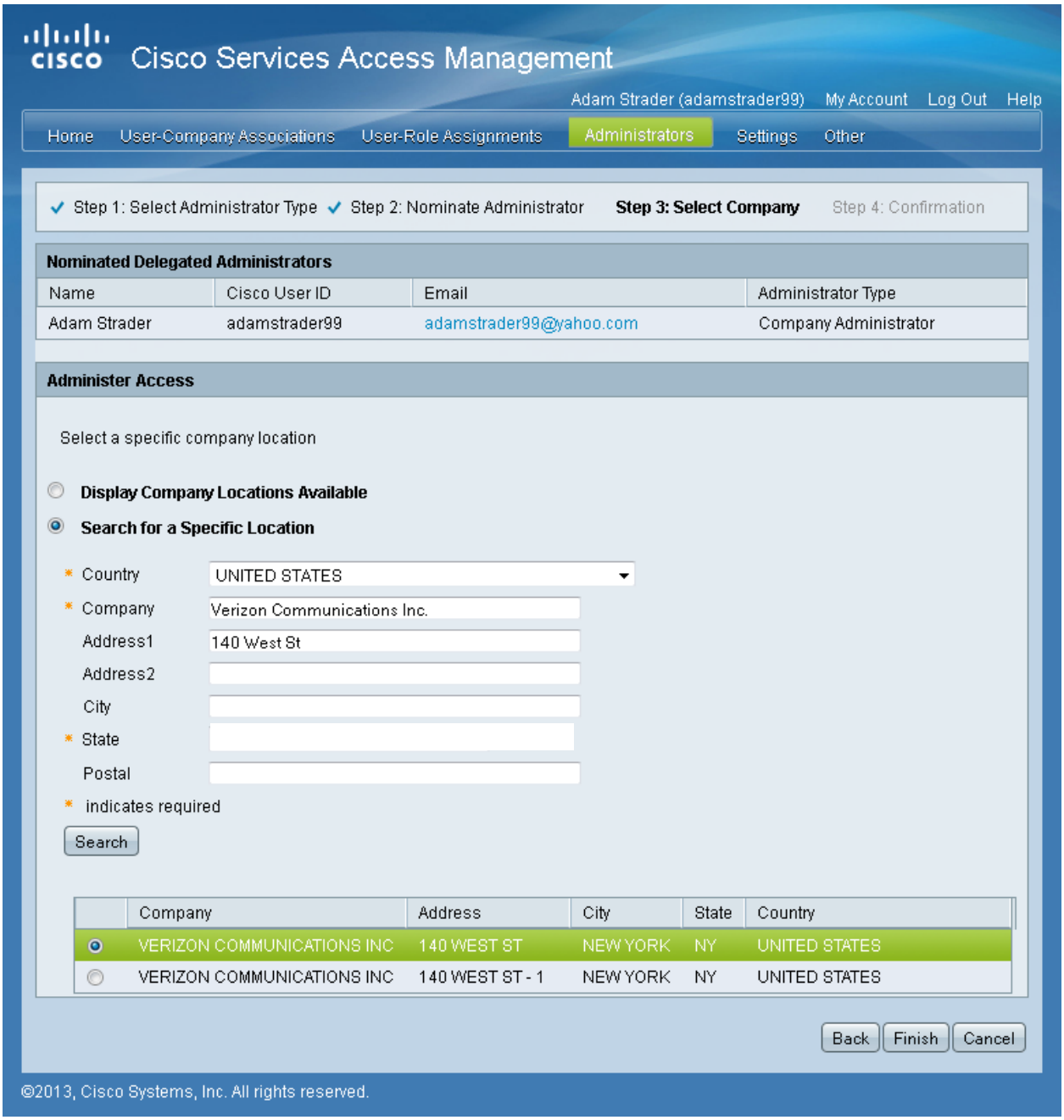
Step 3: Select Company

Company Administrator can either assign the additional Administrator to the same company as a backup Administrator or to new location for your company. Choose the appropriate radio-button option, to either:

- Display Company Locations Available
- Search for a Specific Location



If you choose the option to “Search for a Specific Location”, you will need to enter search criteria by specifying country, company and state. Select the company from the list displayed. Click on “Finish” to confirm nomination of the selected user as the Delegated Administrator for the selected company. A confirmation screen is shown.



The user nominated as the Delegated Administrator will be notified via email that their account is now associated with that company and that they have been nominated as the Delegated Administrator.

Existing Delegated Administrators of the company will also receive email notifications, based on their notification settings, indicating that a user has been nominated as the Delegated Administrator for their company.

Role Administrators

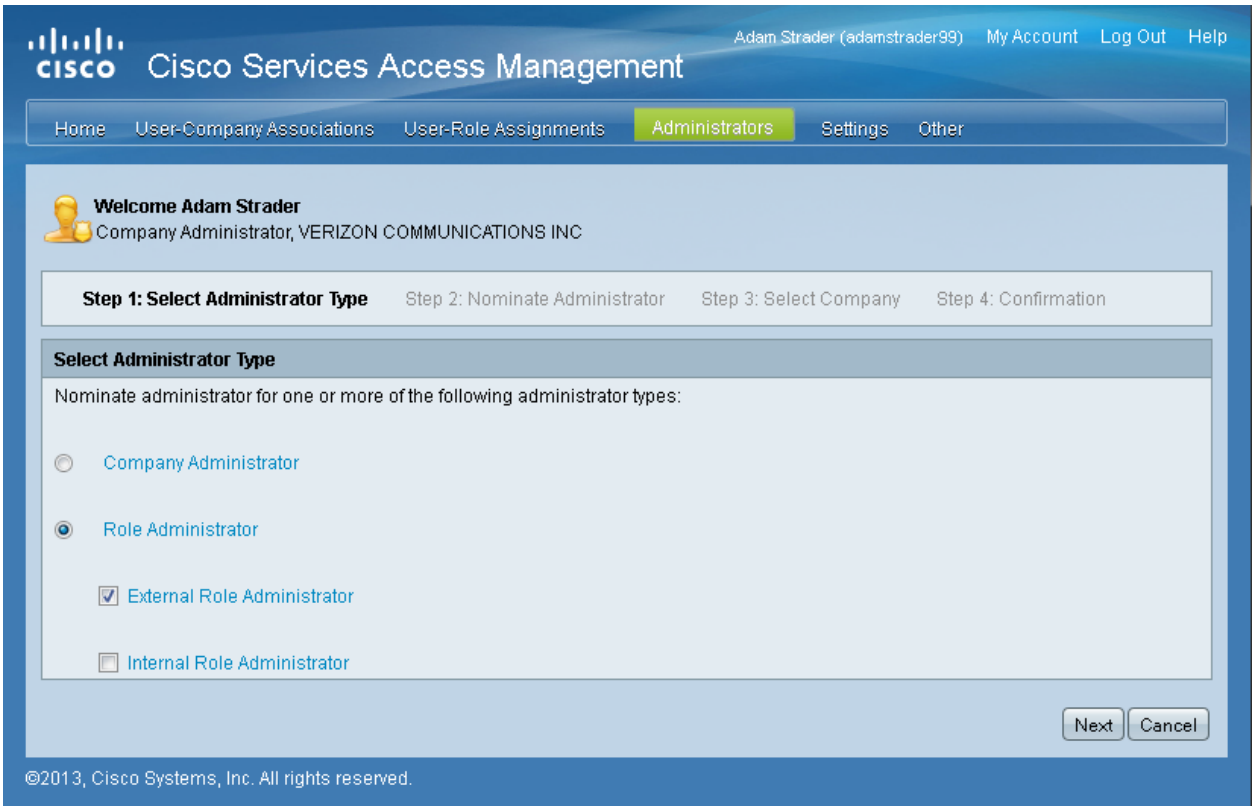
A Company Administrator can nominate Role Administrators to as assign, approve or reject user role requests. Role Administrators are not authorized to change any company settings or make/approve user-company associations. That responsibility remains with the Company Administrator.

Role Administrators are two kinds – Internal Role Administrator and External Role Administrator. Internal Role Administrator can only assign roles only within the company. External Role Administrator can assign to users outside of his company.

Cisco predefines roles such that some can only be granted to user swithin your own company; others outside of the company and some not able to be passed by a Role Administrator at all. The Role Administrator can only assign the roles that they themselves have been granted by the Company Administrator.

For example: Company Administrator wants to allow someone in his company to handle role assignment for certain set of roles. He nominates the user to be an Internal Role Administrator and assigns thatuser the set of roles that they can pass to other users within the company.

To nominate Role Delegated Administrators for your company, use the top menus to navigate to "Administrators → Nominate an Administrator".

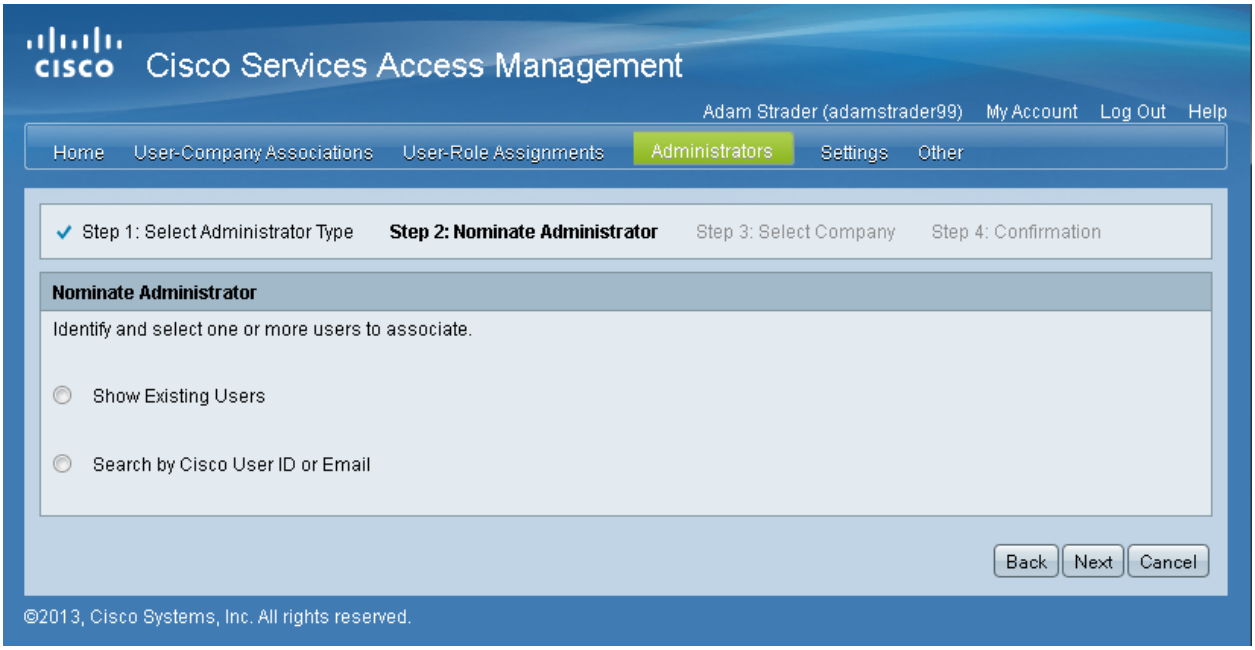


Step 1: Select Administrator Type

Use the radio button to select "Role Administrator".

Use the checkboxes to indicate whether this Role Administrator will be assigning roles to users outside the company (External Role Administrator), within the same company (Internal Role Administrator), or both.

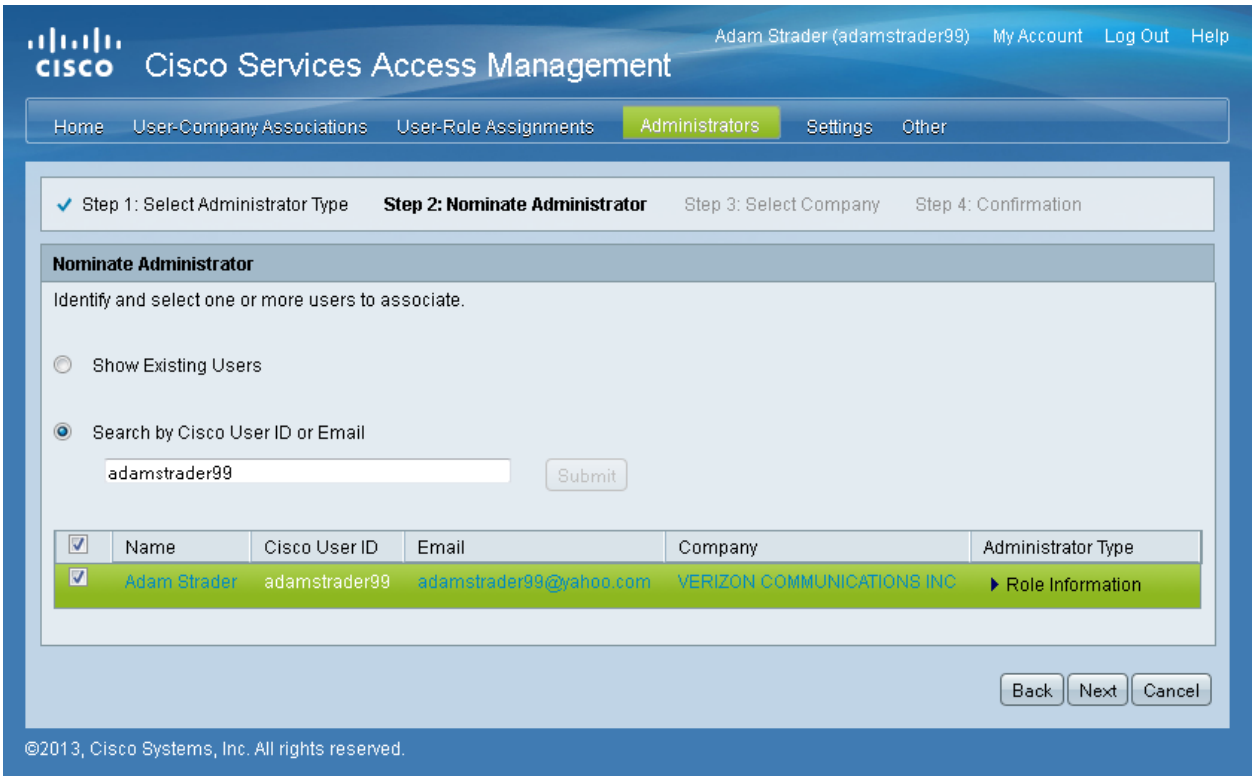
Click “Next”.



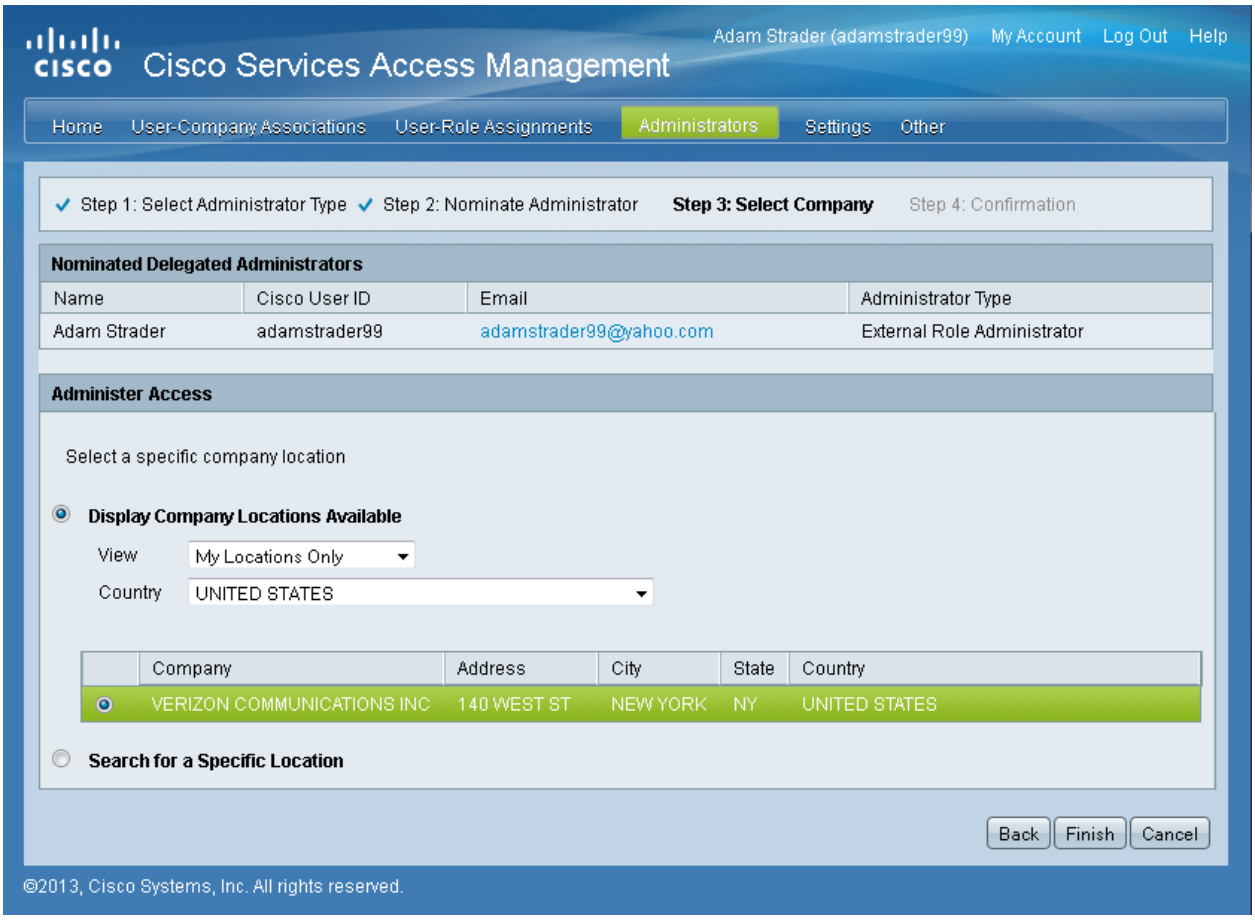
Step 2: Nominate Administrator

Choose the appropriate radio-button option, to either:

- Show existing users
- Search by Cisco User ID or Email address



Based on your choice, the system will display a list of one or more users. Select the user to be nominated, and click “Next”.



Step 3: Select Company

Choose the appropriate radio-button option, to either:

- Display Company Locations Available
- Search for a Specific Location

If you choose the option to "Search for a Specific Location", you will need to enter search criteria by specifying country, company and state. Select the company from the list displayed. Click "Finish" to confirm nomination of the selected user as the Delegated Administrator for the selected company.

The nominated user will be notified via email that their account is now associated with that company and that they have been nominated as the Role Delegated Administrator. Note: Existing Delegated Administrators of the company will also receive email notifications, based on their notification settings, indicating that a user has been nominated as the Delegated Administrator for their company.

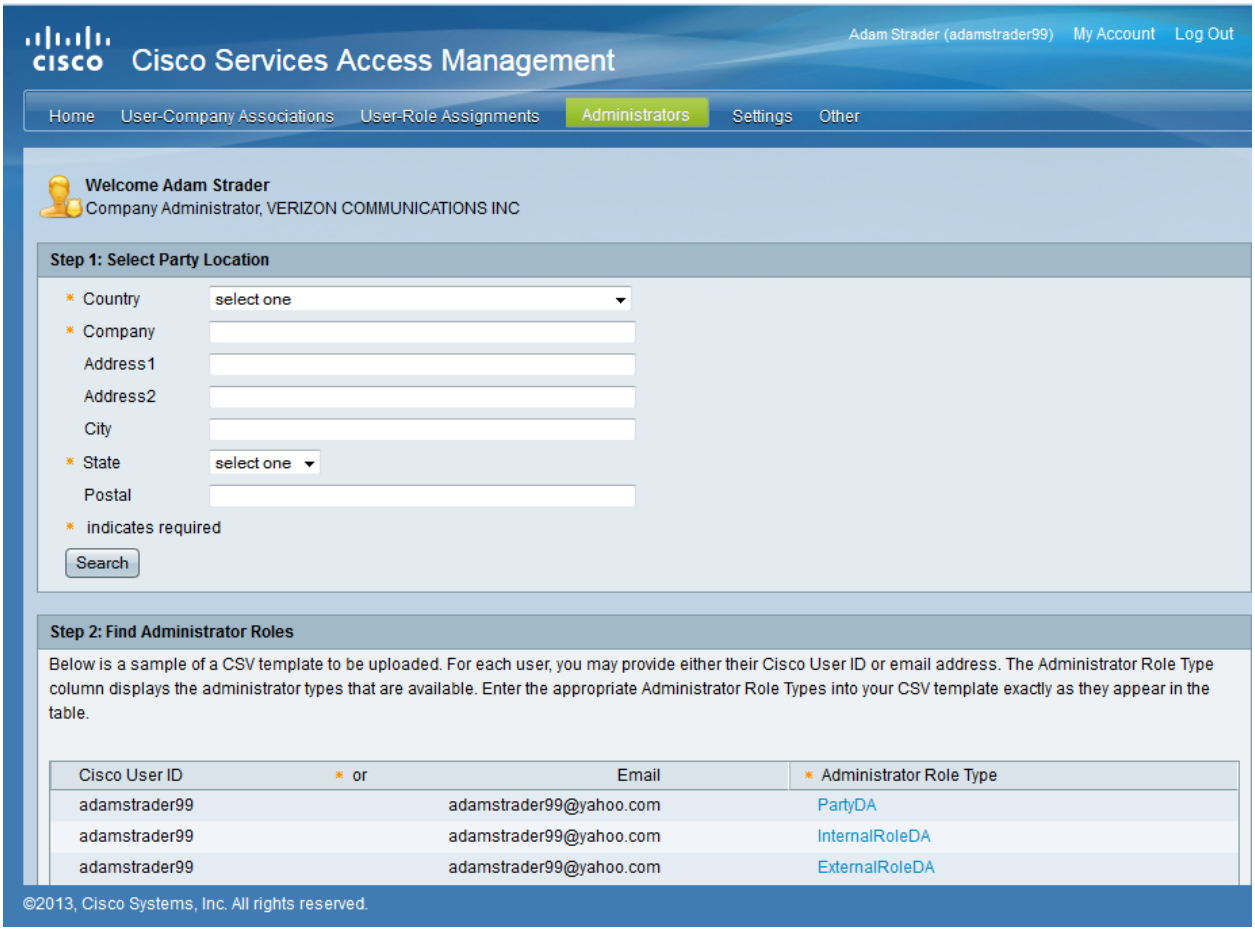
The email contains the link to Cisco Services Access Management. Upon clicking the link, they will be presented with Cisco Services Access Management legal agreement same as Delegated Administrator.

To assign roles to the user, the Role Administrator would follow the process described in section "User role assignment using Cisco Services Access Management" above.

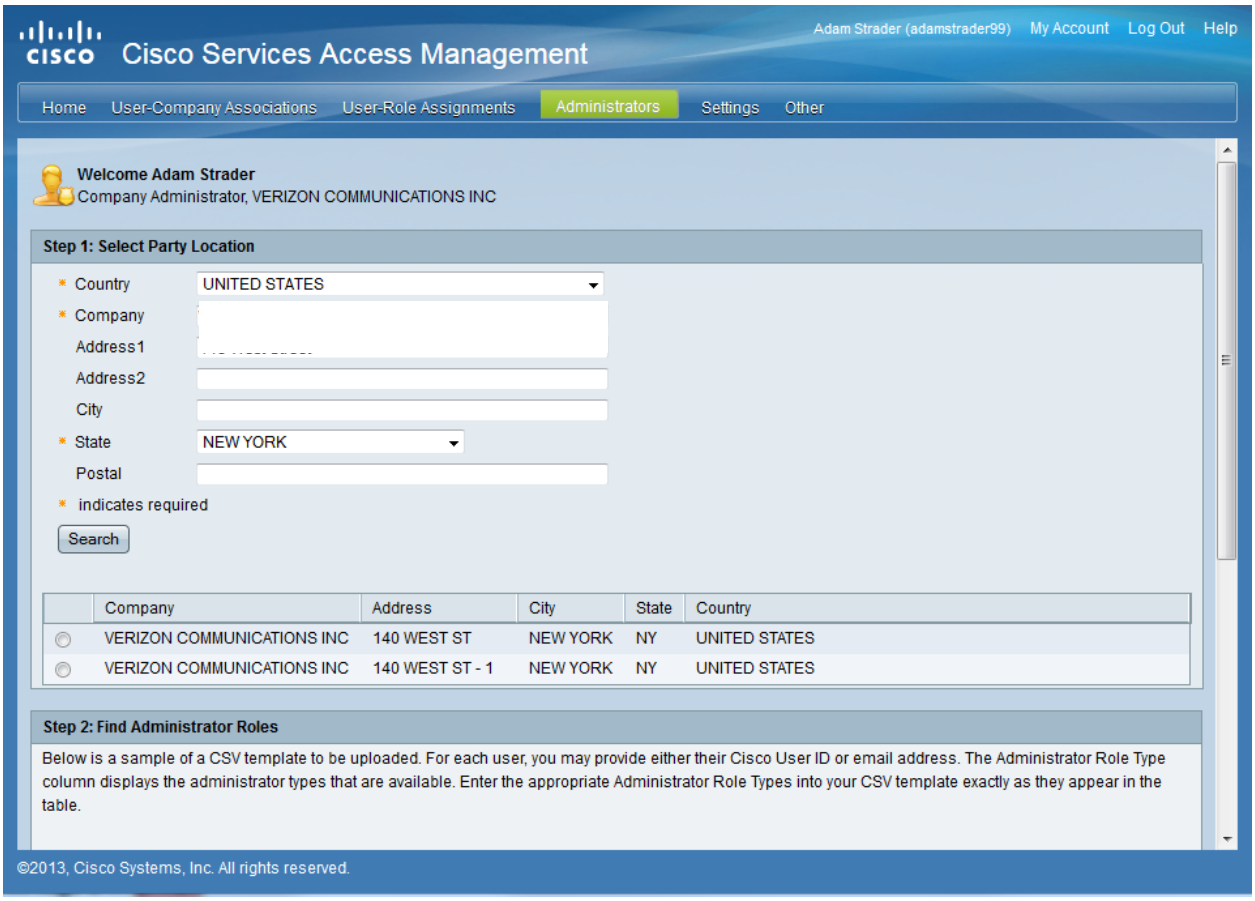
Nominating multiple additional Delegated Administrators using batch upload

Multiple users can be simultaneously nominated as additional Delegated Administrators for a company by doing a "batch upload" in Cisco Services Access Management.

Use the top menus to navigate to "Administrators → Batch Upload".



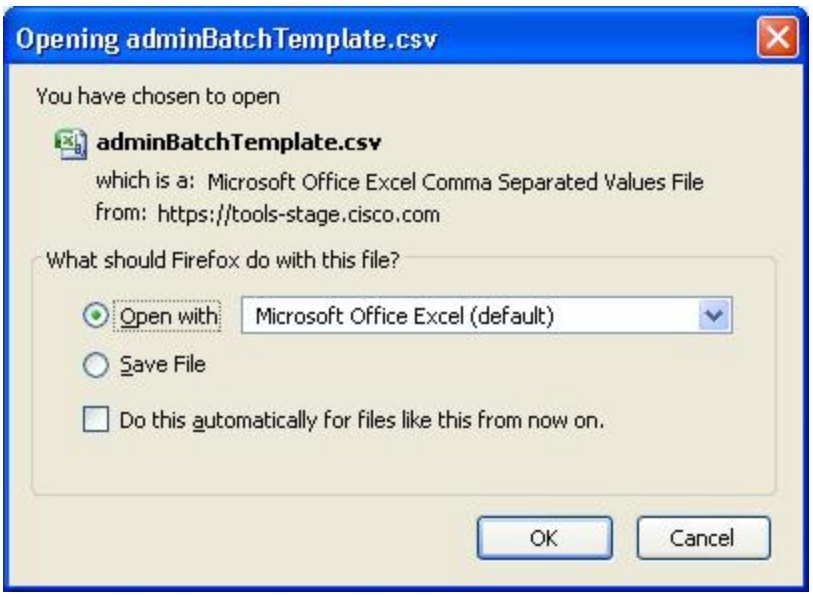
Enter the details to search for the company location for which you want to nominate additional Delegated Administrators. Select the company location from the list displayed.

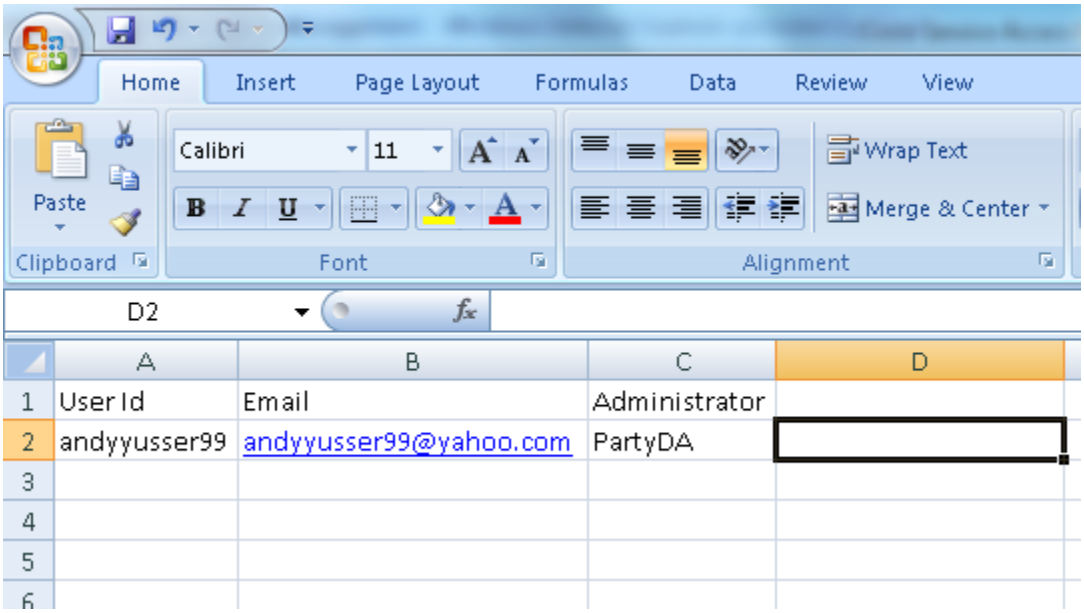


Download the template for uploading the list of users. Save this file locally as “adminBatchTemplate.csv”. Enter the details of the users that you want to nominate as Delegated Administrators.

Changing the filename, file format or the column headers will result in an error in completion of the request to nominate multiple users as Delegated Administrators.

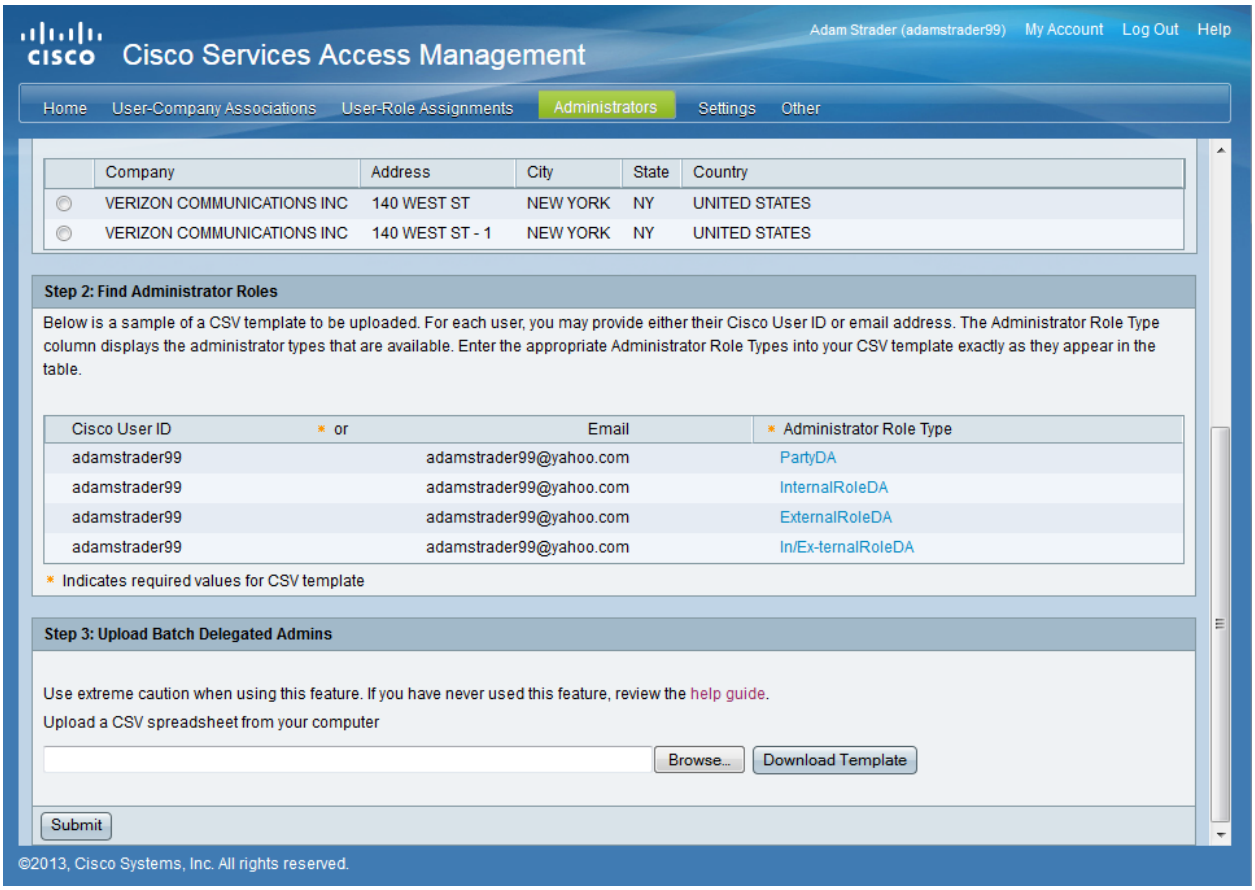
This file can be re-used to nominate additional Delegated Administrators by simply changing the details of the users in the file uploaded.





Upload this template, saved locally, having the details of the users to be nominated as the Delegated Administrators. Select the company and click on “Submit”. A confirmation message is displayed.

If there was an error in nominating any of the users in the list, their information will be displayed on the confirmation page along with the reason for them not being nominated.

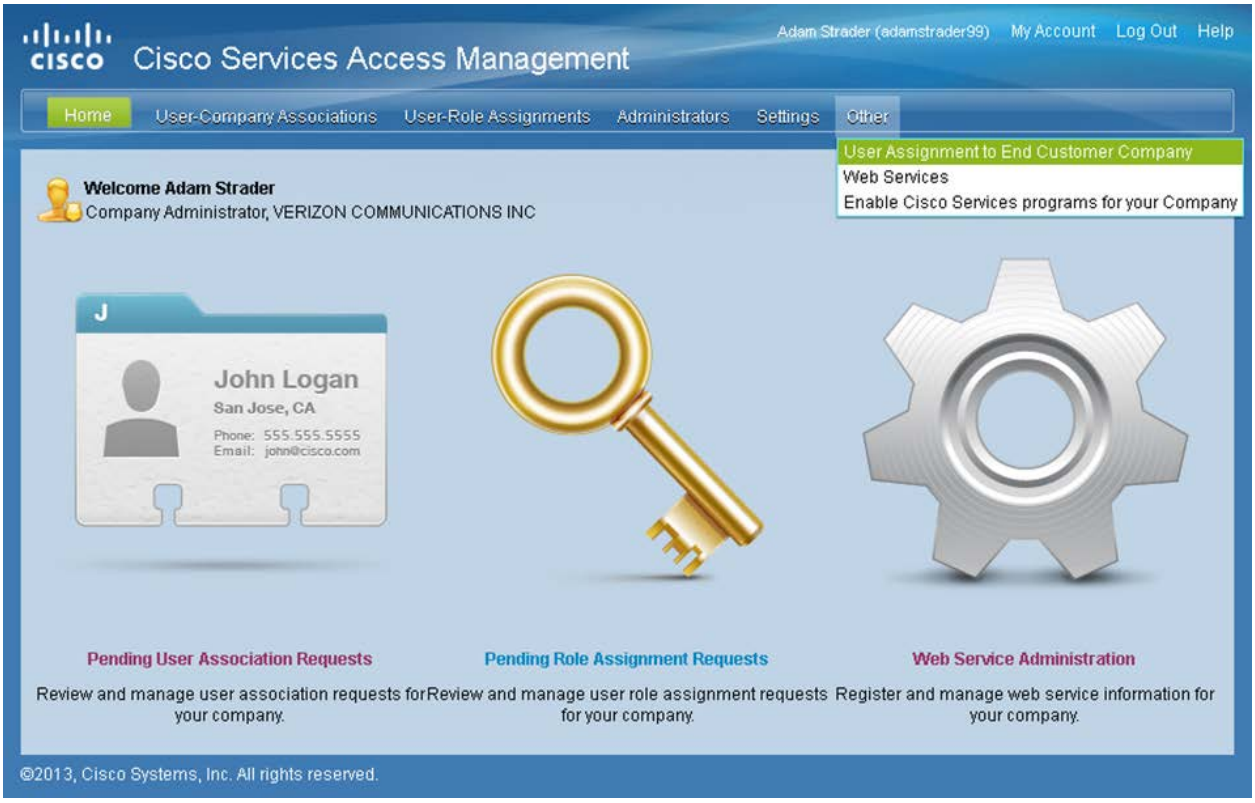


The users nominated successfully as the Delegated Administrators will be notified via email about their association with the company and their nomination to become the Delegated Administrator for the company.

Existing Delegated Administrators of that company will also be notified via email, based on their notification settings, that a user has been nominated as the Delegated Administrator for their company. Once submitted the batch takes about 15 minutes to be loaded into the system as the batch job synch up job runs every 15 minutes.

Other Links

Links to additional Cisco access management tools can be found in the “Other” menu.



The list of links is filtered to only show those tools to which the user is authorized, but may include:

- Service Access Management Tool
- User Assignment to End Customer Company
- Enable Cisco Services programs for your Company
- Web Services

Service Access Management Tool

A Company Administrator who is also a Contract Administrator or Bill-To ID Administrator in the Service Access Management Tool can use the top menu to navigate to "Other → Service Access Management Tool" in order to manage user-to-contract and user-to-BID access for their users.

User Assignment to End Customers

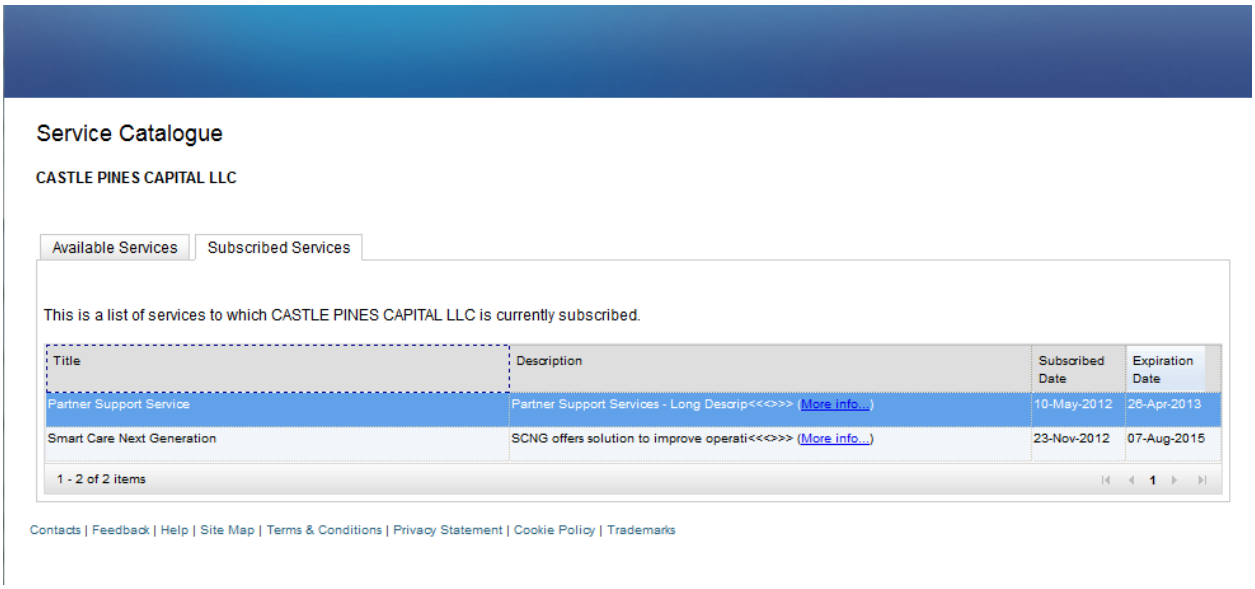
A Company Administrator (or a Role DA having a Partner Administrator role) of a Partner Company which is subscribed and entitled to certain service offers may need to assign user access to other companies. (For example, a Partner Administrator may need to assign roles for their Partner Users to access data for one or more of their end customer companies.) Use the "Other → User Assignment to End Customer Company" menu option to access this feature. This feature is only available for certain specific business services, and is described in Appendix C, "User Role Assignment to End Customer Companies".

Enable Cisco Services programs for your Company

Partners and Direct Customers purchase service contracts from Cisco through service programs. Once your company has an active Delegated Administrator, some service programs will be automatically enabled for your company when a service contract is signed, while others must be manually requested. Associated users can view a list of their company's enabled services, and request enablement for new services, through a "service catalogue". The catalog is accessed from a link on the "Additional Access" tab of Cisco.com Profile Manager.

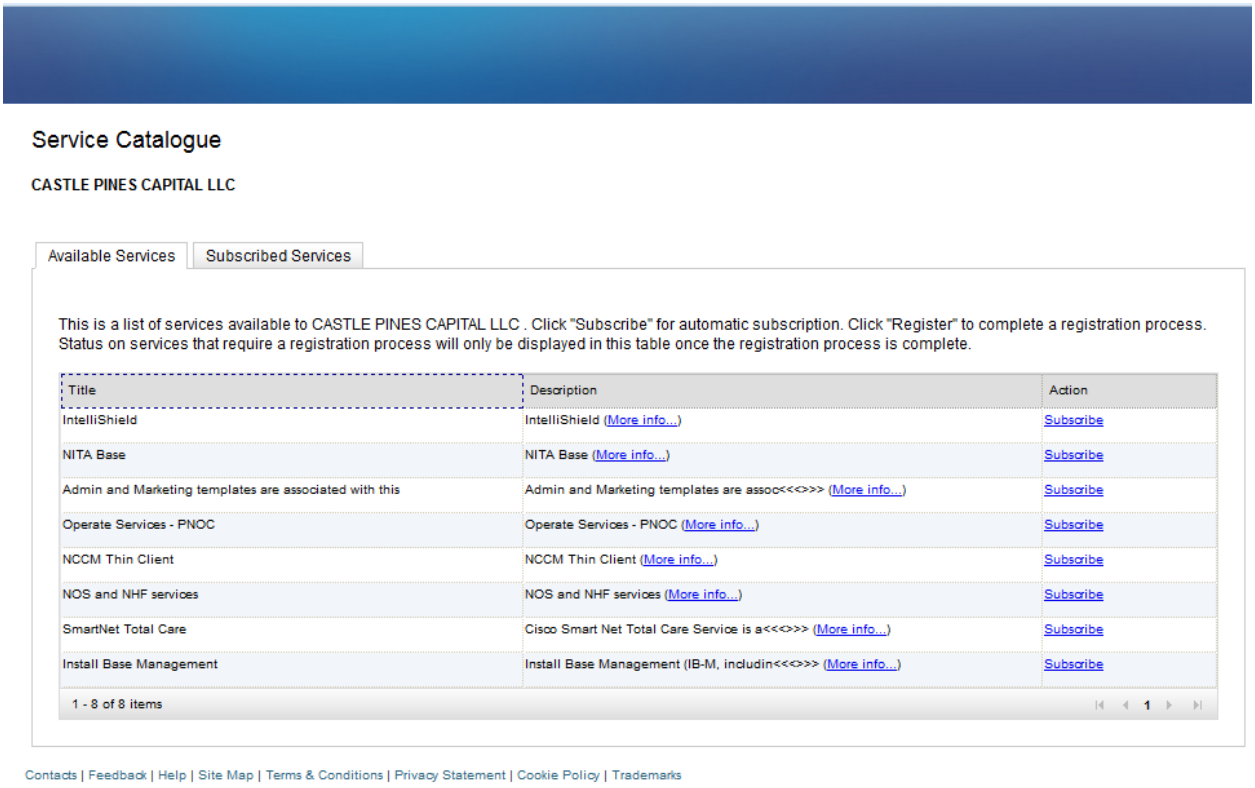
Subscribed Services

The Subscribed Services tab lists the services to which your company is currently subscribed.



Available Services

The Available Services tab lists additional services or programs that your company may qualify for.



For any listed service, clicking the “Subscribe” link will submit a request to validate the existence of any necessary service contract. The requestor will receive an email notification with the result of that contract check. If the validation passed successfully, the company’s Delegated Administrator will also receive an email, notifying them of the newly-enabled service, and instructing them to assign the corresponding service access roles.

Appendix A: Frequently Asked Questions

1. Who will use Cisco Services Access Management?
2. Who, at my company, can get nominated as a Delegated Administrator?
3. As the first Delegated Administrator for a large company, how can I most efficiently manage access for users that are geographically dispersed?
4. My company has a lot of users. Do I have to add each one manually?
5. An associated user has left my company. What should I do?
6. I have nominated additional Delegated Administrators who will manage their company organization user-company associations and user-role assignments. What do I need to do to ensure that I am not the first person contacted for user access requests?
7. How can I see who has associated a user or nominated the additional company administrator?
8. A user is having difficulty in requesting association to my company through Profile Manager. What might the problem be, and how can I solve it myself?
9. A user does not see the link in Profile Manager to request for additional access to Cisco Services delivered by Cisco to my company. What could be the issue?
10. As the Delegated Administrator, I had asked users to request for a specific role using Profile Manager. But they cannot see this particular role in the list displayed there. Why is this happening?
11. I get an error while using the "batch upload" feature in Cisco Services Access Management. What could be the issue?
12. Which browsers are supported?

1. Who will use Cisco Services Access Management?

Cisco Administrators use Cisco Service Access Management to nominate Delegated Administrators for a Company.

Once nominated, company Delegated Administrators will use Cisco Services Management to perform the following tasks:

- Establish company settings to specify the criteria for user requests for "self-association" to company and their approval.
- Associate user(s) to their company
- Assign roles to associated users
- Nominate additional Delegated Administrators for their company
- Establish their notification settings

You can also refer to Appendix B for additional information on the features available in Cisco Services Access Management.

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2. Who, at my company, can get nominated as a Delegated Administrator?

A Delegated Administrator should be a trusted person at your company who, once trained on the application, is knowledgeable about the company's employees and what Cisco services they do and do not need to access.

One person at your company will be nominated as your first Delegated Administrator by a Cisco Administrator, and will need to accept the Terms and Conditions on behalf of their company. That first Delegated Administrator can choose to pass this responsibility onto another person at their company, nominate a backup administrator, or nominate additional administrators to manage additional locations of the company.

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3. As the first Delegated Administrator for a large company, how can I most efficiently manage access for users that are geographically dispersed?

Cisco Services Access Management is designed to flexibly accommodate companies of various sizes and allows for centralization or decentralization of administration according to each company's needs.

The Delegated Administrator for a company has the option to nominate additional company administrators, or set up multiple branch locations that can be administered separately by multiple administrators. These Delegated Administrators will then be able to manage groups of users based at a company location. For details on how to nominate additional company administrators, you can refer to *Delegated Administration* section in this document.

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4. My company has a lot of users. Do I have to add each one manually?

Cisco Services Access Management provides "batch upload" to simultaneously associate multiple users to your company. Refer to the *User company association using batch upload* section in this document to understand how to use this feature.

Alternatively, you can establish the company settings in Cisco Services Access Management to automatically approve all self-association requests by users with matching criteria. Auto-approval of requests can be setup based on one or a combination of the following:

- Company passcode matching – Generate a unique company passcode and provide it to the users to specify in Profile Manager while requesting company association.
- Email domain matching – This may be your company email domain which would be the same for all users in your company and used by them while registering on Cisco.com

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5. An associated user has left my company. What should I do?

   As the Delegated Administrator, it is your responsibility to disassociate this user from your company using Cisco Services Access Management feature – "Change a User's Company Association".
   As soon as the user's company association is removed, all roles assigned to this user for access to additional Cisco Services will automatically be deleted.

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6. I have nominated additional Delegated Administrators who will manage their company organization user-company associations and user-role assignments. What do I need to do to ensure that I am not the first person contacted for user access requests?

   Once you have nominated additional company Delegated Administrators, they will all have the same access privilege in Cisco Services Access Management. You can now go to the "Change Notification Settings" in Cisco Services Access Management and select the appropriate setting to ensure that your contact information is not displayed to users associated to your company. Additionally, you may also set your preference to not receive any notification for a user submission. You should, however, periodically access Cisco Service Access Management to look for any overdue requests that the other Delegated Administrators have not yet acted upon.

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7. How can I see who has associated a user or nominated the additional company administrator?

   If you need to see who has nominated the additional company administrator for your company or who associated a particular user to your company, you need to go to the "View Existing Administrators" or the "View Existing Users" screen. A mouse over the " " icon next to their name will display the details of the person who has nominated that administrator or accepted that user-company association.

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8. A user is having difficulty in requesting association to my company through Profile Manager. What might the problem be, and how can I solve it myself?

   Check with the user to see if the user details they specified in Cisco.com Profile Manager match the company self-association settings you have established.

   - If the user did not register in Cisco.com with their company email address, then they cannot self-associate via email domain matching. If email domain matching is your preferred association method, then have them update their primary email address in Cisco.com Profile Manager.
   - If the user is searching for the company by address, your company settings may be set to only allow users to associate to specific locations that have a Delegated Administrator assigned. They may need to remove some of the search criteria, and only search by company name and country.

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9. A user does not see the link in Profile Manager to request for additional access to Cisco Services delivered by Cisco to my company. What could be the issue?

   A user needs to first be associated with your company, before they can see what services may be available. The user will be able to see the link to request for additional access to Cisco Services only after their company association is in "Approved" status.

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10. As the Delegated Administrator, I had asked users to request a specific role using Profile Manager. But they cannot see this particular role in the list displayed there. Why is this happening?

    The list of roles available in Profile Manager, for access to additional Cisco Services, depends on the company to which the user is associated. Verify that this user is associated to the correct branch/location of your company.

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11. I get an error while using the "batch upload" feature in Cisco Services Access Management. What could be the issue?

    The batch upload features are available to associate multiple users simultaneously to your company, or to nominate multiple users as additional Delegated Administrators for your company.

    Error in batch upload could be for one or a combination of the following issues:

    - Incorrect template name or format being used. Templates should be saved locally as "associationBatchTemplate.csv" for associating users or "adminBatchTemplate.csv" for nomination of company administrators.
    - Changes made to the original column headers in the template uploaded.
    - User ID specified in the template is an invalid CCO ID or not registered on Cisco.com
    - Email address specified in the template is incorrect
    - User is already an active and existing delegated administrator or associated user for that company.

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12. Which browsers are supported?

It is recommended to use the following browsers versions for Cisco Services Access Management:

- Firefox 3.x and above
- IE 6.x and above
- Chrome 7.x and above
- Safari 4.x and above

It is further recommended that the browser window be maximized, to minimize the need for scrolling.

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Appendix B: Cisco Services Access Management Features

Cisco Services Access Management provides the following features:

- **Establish company & notification settings**
  This feature enables the Delegated Administrator to establish the company settings by providing the criteria for "self-association" to company. "Self-Association" refers to the scenario where users from the company will request association to the company using Profile Manager. The company settings established in Cisco Services Access Management will be used to decide approval criteria for these user company association requests.
  Cisco Services Access Management allows you to specify valid email domains allowed, specify if approval will be based on user's address matching the company address, generation of a unique company passcode which you may ask users to specify while requesting company association.
  The details specified for the company in Cisco Services Access Management will then be validated against when a user requests for company association using Profile Manager.
  You will be able to establish the approval settings to either manual or automatic based on these criteria specified for the company. This will allow you to have a tightly controlled or a flexible approval process.
  Notification settings may also be established in Cisco Services Access Management based on your requirement. You may choose to get notified for every user submitted request or a daily summary of requests or not get notified at all.

- **User company association and management**
  Cisco Services Access Management allows Delegated Administrator to associate users to their company. This may be done for individual users or multiple users (as a batch upload).
  You will be able to manage user company associations by using the Add/Edit feature provided by Cisco Services Access Management.
  Alternatively, users will also be able to request association to your company and request for additional roles and access to Cisco Services using Profile Manager. Cisco Services Access Management provides the feature to approve/deny and manage these user requests.

- **User role assignments and management**
  Cisco Services Access Management allows Delegated Administrator to assign roles to users associated to their company. The roles assigned will determine the access level for that user to Cisco protected Services.
  You will be able to manage the user role assignments by using the add/edit/remove roles feature available in Cisco Services Access Management.
  Alternatively, associated company users will be able to request for additional access to Cisco Services using Profile Manager. Cisco Services Access Management provide you the feature to view these user requests and manage them using the approve/deny role assignment requests.

- **Nominate additional Delegated Administrators**
  Cisco Services Access Management provides the feature to nominate additional Delegated Administrators for a company.
  This feature will enable you to delegate the responsibility and manage internally, within your Company, who gets access to what, depending on your company size (#of users, # of locations).
  A given company level may have one or multiple Delegated Administrators. Different levels of the company may then be managed by different Delegated Administrators. This will eventually assist in management of user-company associations and user-role assignments at the various company levels/locations.

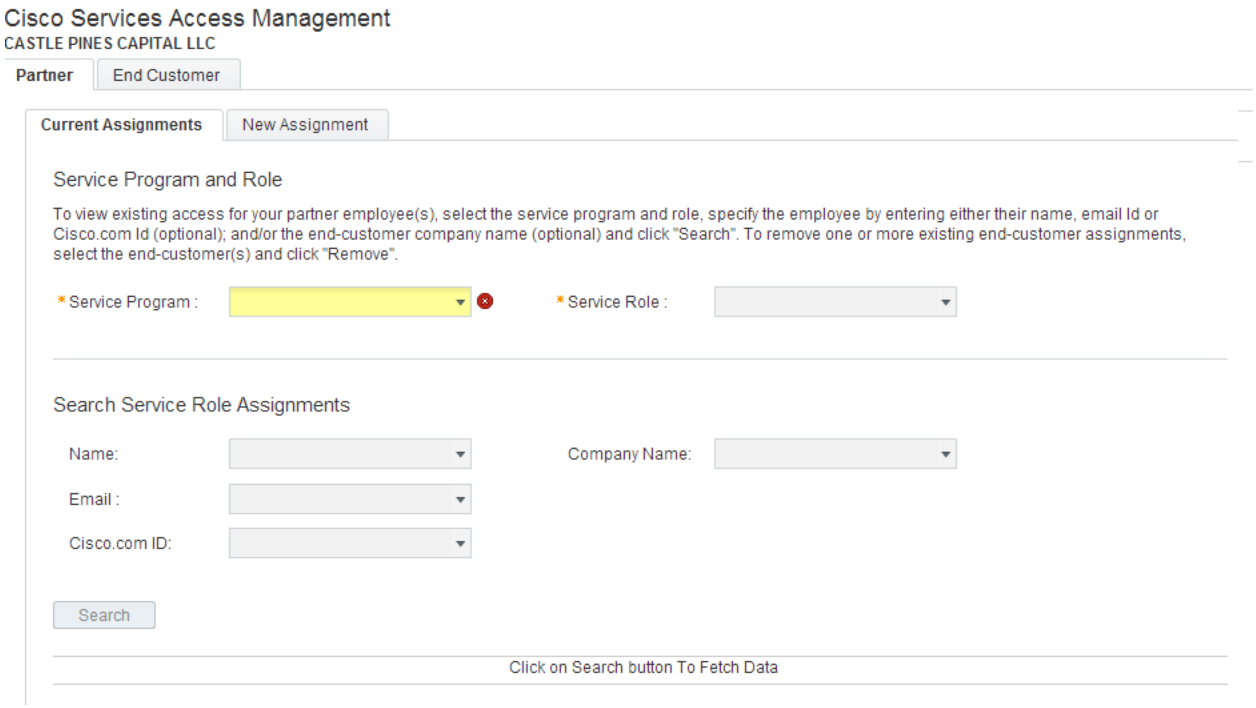
Appendix C: User Role Assignment to End Customer Companies

While most party-centric role-based access is based upon the party granting the role, in some cases a role is granted to another party. One example is where a partner administrator wants to grant, to one of his partner users, access to a specific end customer company. In those cases, the "User Assignment to End Customer Companies" function is used.

Note: A Partner company can be subscribed to the Partner Support Service using BSSLP Enablement user-interface – see Appendix-D for details.

A similar process can also be used to grant role-based access for his End Customer employee, who can only gain access to Cisco services through their business partner and therefore do not have their own delegated administrators.

"User Assignment to End Customer companies" user-interface has two primary Tabs – Partner Tab, and End Customer Tab as can be seen below.



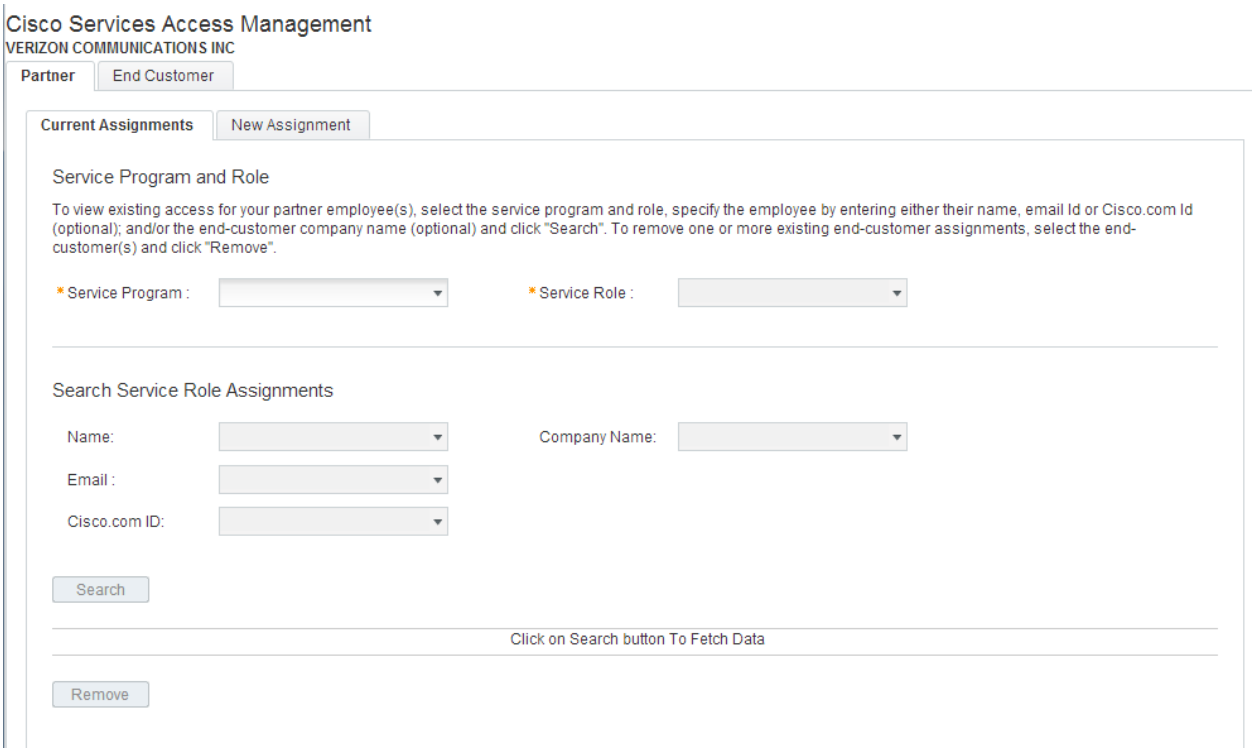
The Partner Tab can be used to assign one or more End Customer companies to a Partner Employee for a specific role. In turn, the Partner Tab has two Tabs – Current Tab and New Assignment Tab.

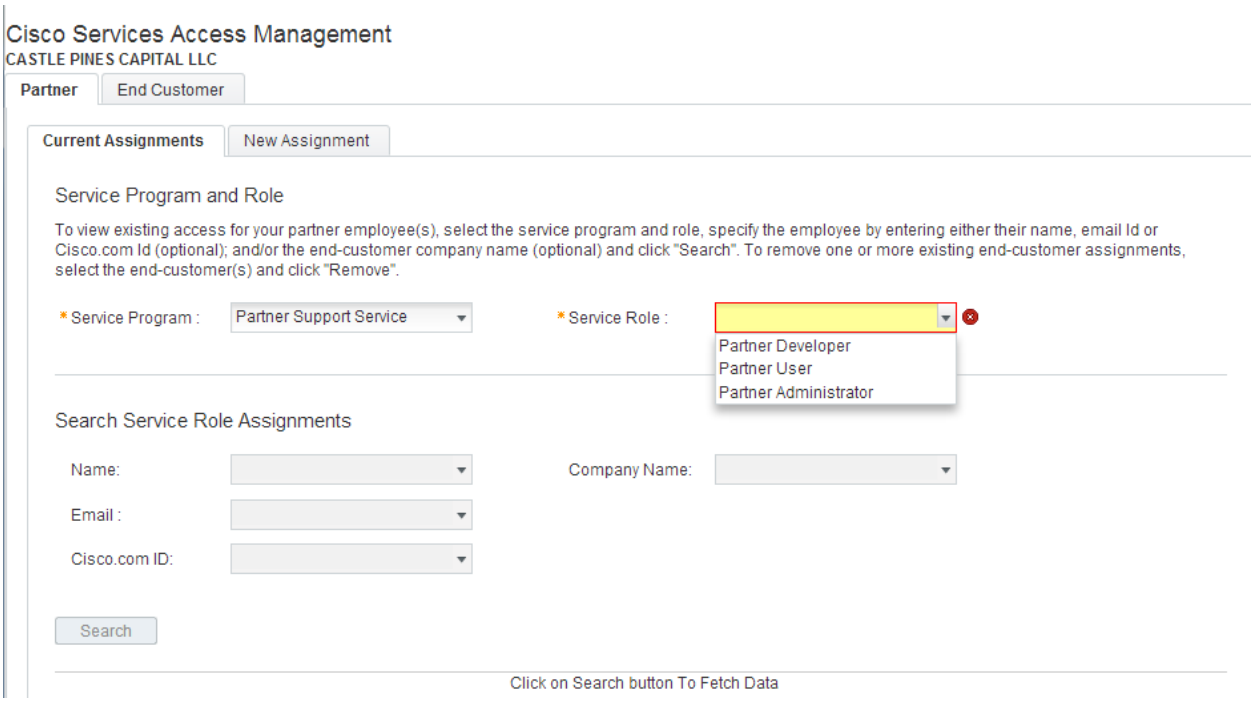
The End Customer Tab can be used to assign one or more End Customer companies to an End Customer employee for the End-Customer User role.

Partner-Current Tab

Click on the Partner–Current tab to view or remove existing Customer assignments to a Partner Employee.

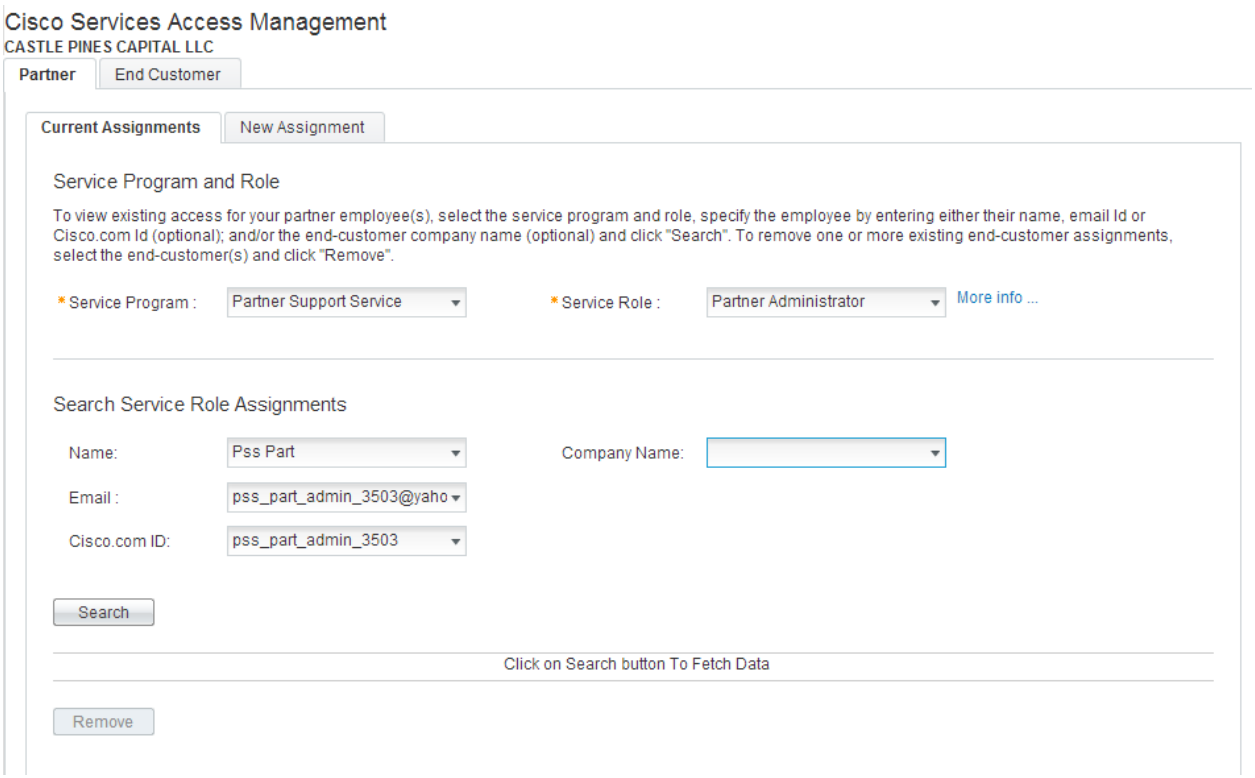
Select the Service Program and Service Role from the drop-down list. Click on the “more info” link to display the description of the Service Role.

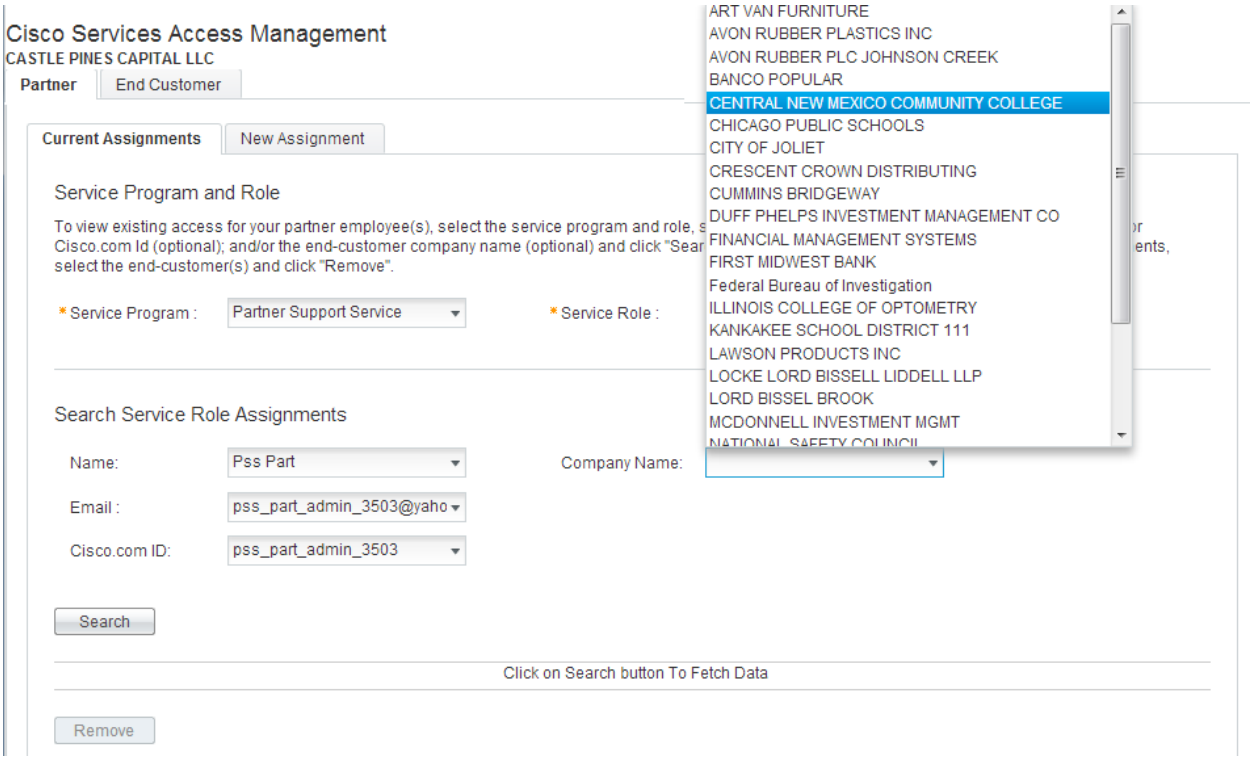




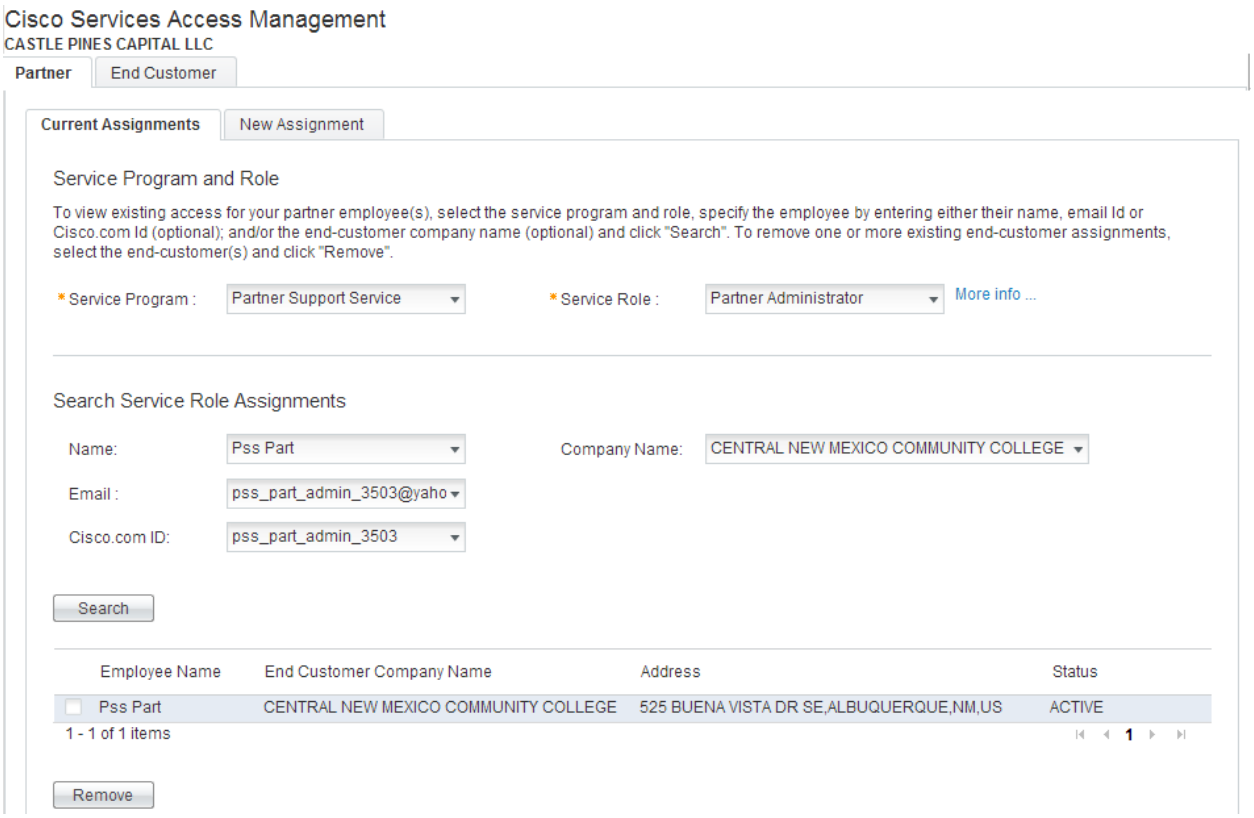
If Customers have been assigned in the Partner-New Assignment Tab, only then the remaining fields in the Partner-Current Tab could be entered or selected. Otherwise, the values entered will not be recognized and will be flagged as invalid or will be blank with no auto-suggest nor any dropdown list.

The next three fields – Name, Email and Cisco.com ID – are to specify a Partner employee who is assigned one or more End Customer companies for the selected service role. They are auto-suggest fields, and as you start entering a field value for one of these three fields, the matching names, email or Cisco.com IDs will be displayed. Selecting a value for one field will enable the remaining two fields to be auto-populated.

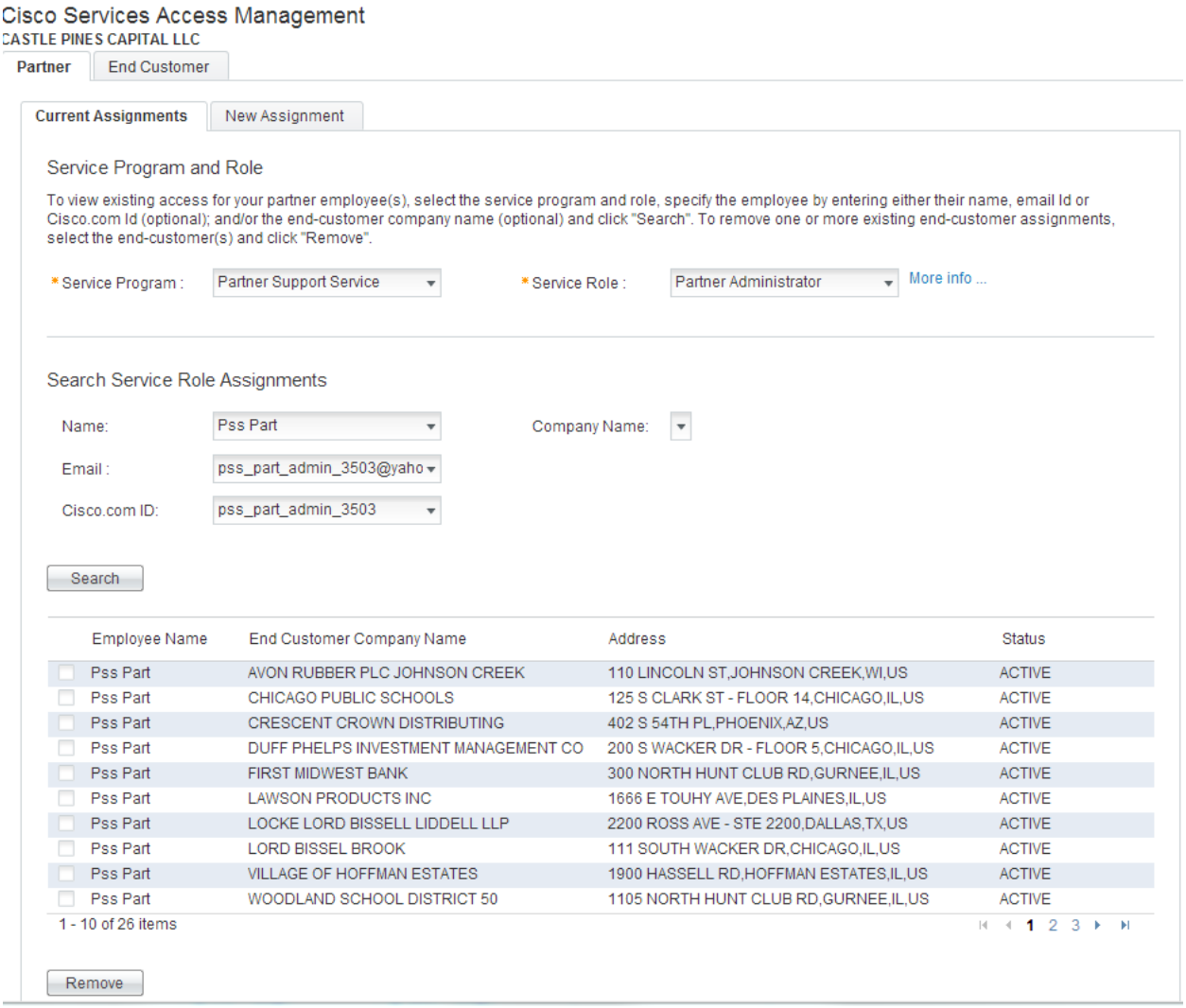



Cisco Services Access Management
CASTLE PINES CAPITAL LLC
Partner
End Customer
Current Assignments
New Assignment
Service Program and Role
To view existing access for your partner employee(s), select the service program and role, s
Cisco.com Id (optional); and/or the end-customer company name (optional) and click "Sear
select the end-customer(s) and click "Remove".
* Service Program :
Partner Support Service
* Service Role :
Search Service Role Assignments
Name:
Pss Part
Company Name:
Email :
pss_part_admin_3503@yaho
Cisco.com ID:
pss_part_admin_3503
Search
Click on Search button To Fetch Data
Remove
ART VAN FURNITURE
AVON RUBBER PLASTICS INC
AVON RUBBER PLC JOHNSON CREEK
BANCO POPULAR
CENTRAL NEW MEXICO COMMUNITY COLLEGE
CHICAGO PUBLIC SCHOOLS
CITY OF JOLIET
CRESCENT CROWN DISTRIBUTING
CUMMINS BRIDGEWAY
DUFF PHELPS INVESTMENT MANAGEMENT CO
FINANCIAL MANAGEMENT SYSTEMS
FIRST MIDWEST BANK
Federal Bureau of Investigation
ILLINOIS COLLEGE OF OPTOMETRY
KANKAKEE SCHOOL DISTRICT 111
LAWSON PRODUCTS INC
LOCKE LORD BISSELL LIDDELL LLP
LORD BISSEL BROOK
MCDONNELL INVESTMENT MGMT

If Customers have been assigned using the Partner-New Assignment Tab, then in the Partner-Current Tab, the Customer field will have a drop-down list of values. Select a customer name from that list, and click on the search button to initiate the search.

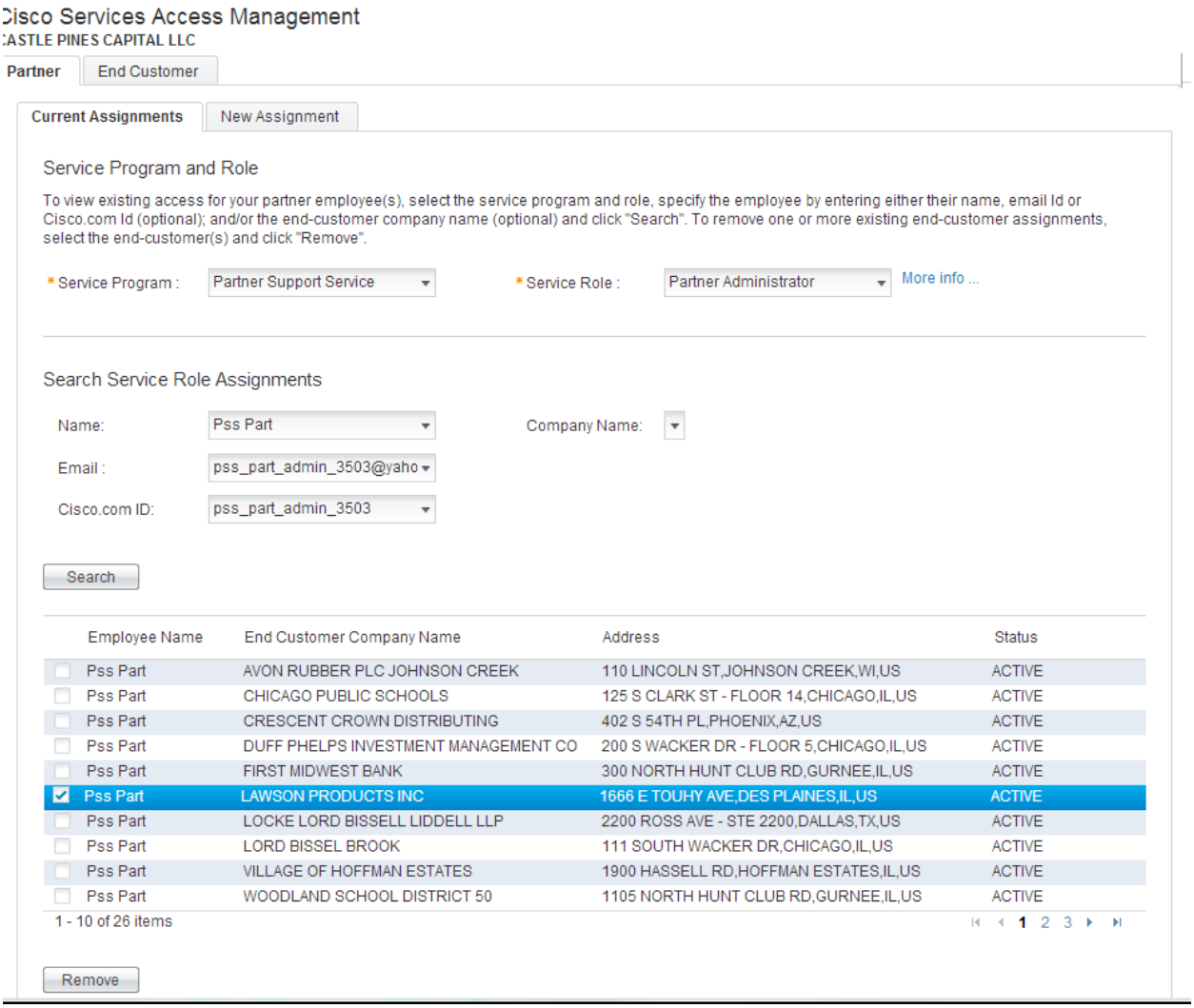


Otherwise, if no customer value is specified and search initiated, all the customers who are assigned to the User-Partner-Role will be displayed in the search results, as illustrated below.



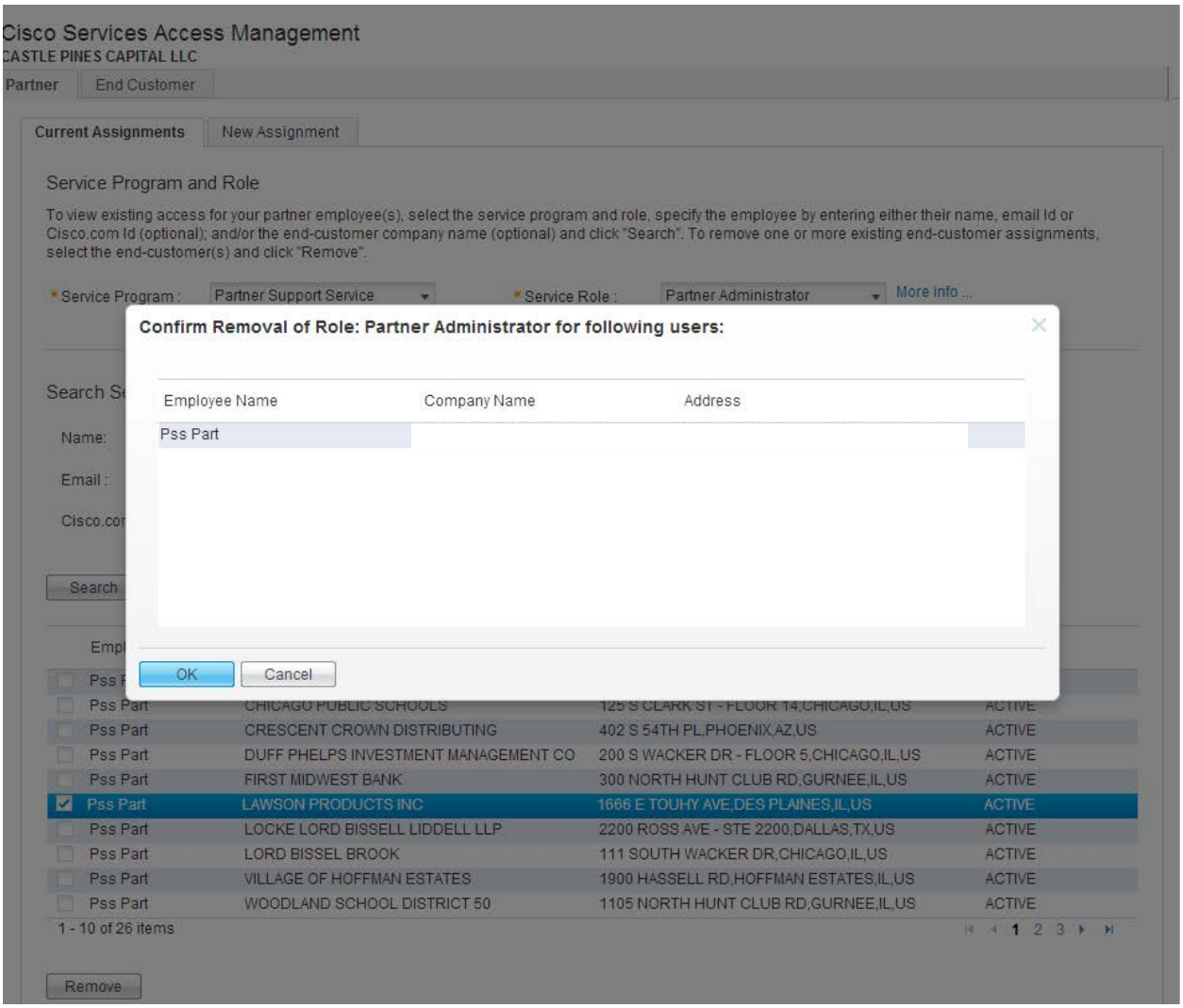
Remove Customer assignments to a User

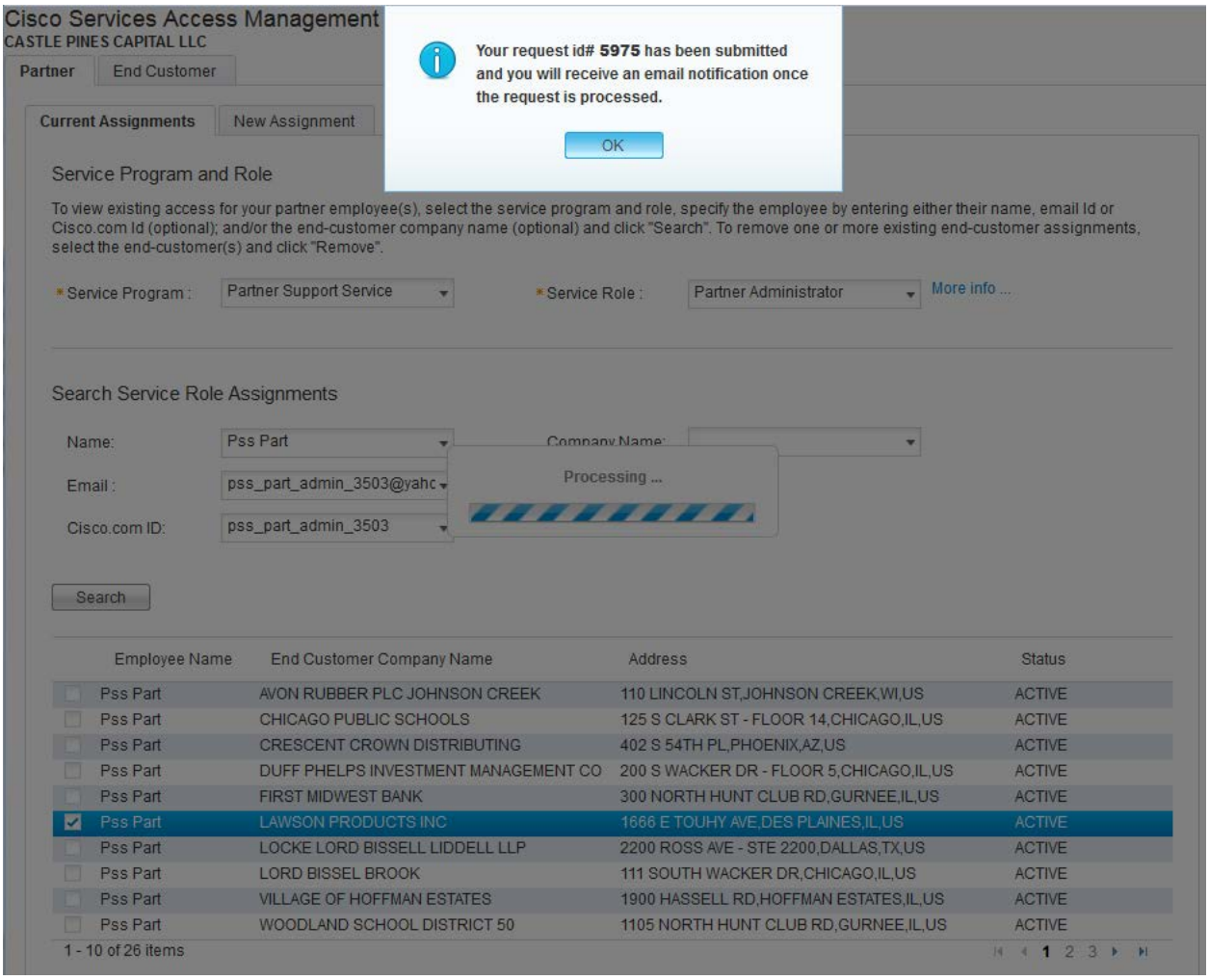
Select the customer assignments to be removed from the list displayed. Selections could be on one or on multiple pages as illustrated below. Then click on Remove.

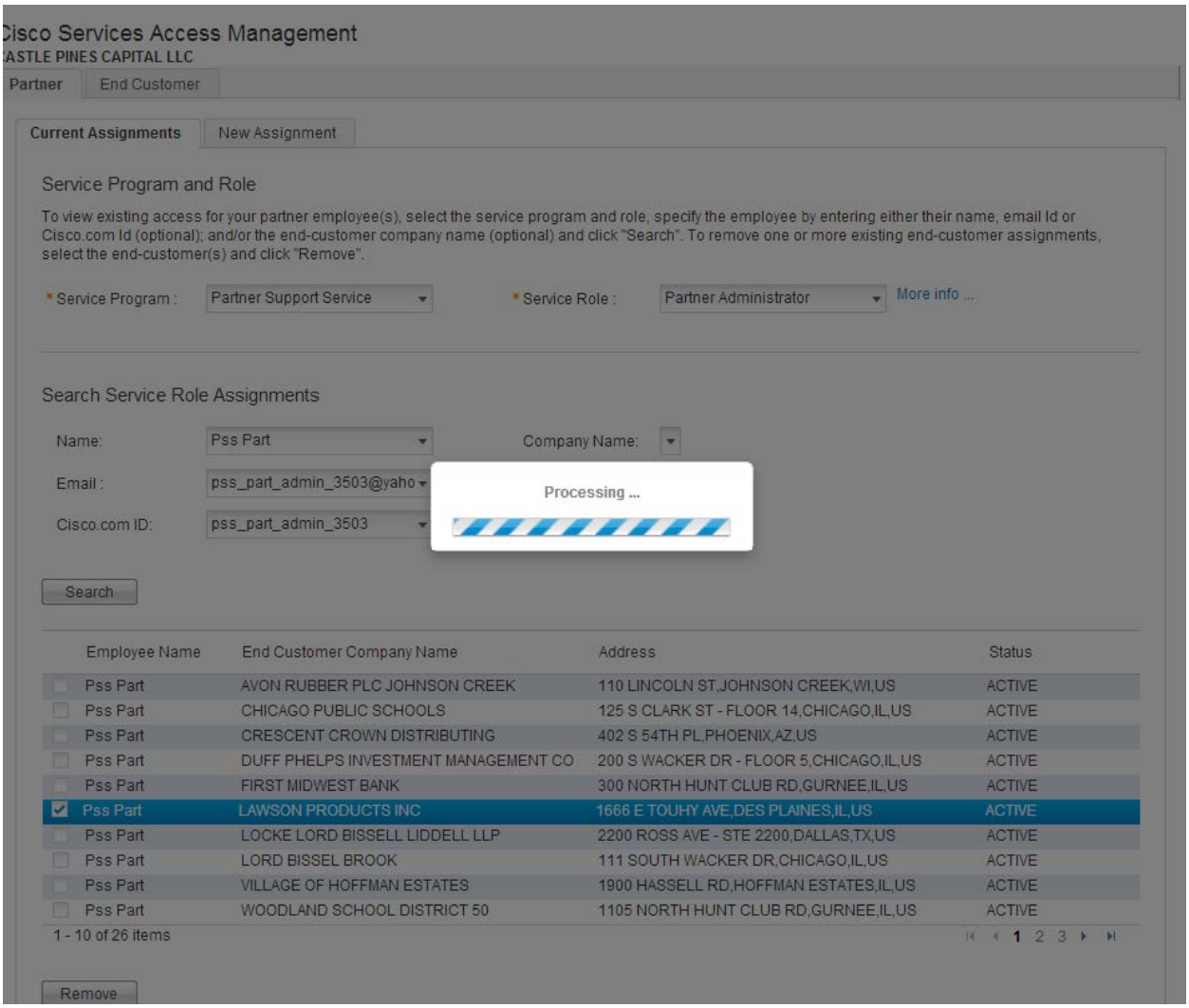


A pop-up is displayed. Click on the “Confirm Remove” button to confirm the selected customer assignments to be removed, otherwise click “Cancel”.

A pop-up message with the Request Id# will be displayed, as illustrated below:


Cisco Services Access Management
CASTLE PINES CAPITAL LLC
Partner
End Customer
Current Assignments
New Assignment
Service Program and Role
To view existing access for your partner employee(s), select the service program and role, specify the employee by entering either their name, email Id or Cisco.com Id (optional); and/or the end-customer company name (optional) and click "Search". To remove one or more existing end-customer assignments, select the end-customer(s) and click "Remove".
* Service Program :
Partner Support Service
* Service Role :
Partner Administrator
More info ...
Confirm Removal of Role: Partner Administrator for following users:
Employee Name
Company Name
Address
Pss Part
OK
Cancel
Search
Name:
Email :
Search
Pss Part
CRESCENT CROWN DISTRIBUTING
402 S 54TH PL,PHOENIX,AZ,US
ACTIVE
Pss Part
DUFF PHELPS INVESTMENT MANAGEMENT CO
200 S WACKER DR - FLOOR 5,CHICAGO,IL,US
ACTIVE
Pss Part
FIRST MIDWEST BANK
300 NORTH HUNT CLUB RD,GURNEE,IL,US
ACTIVE
Pss Part
LAWSON PRODUCTS INC
1666 E TOUHY AVE,DES PLAINES,IL,US
ACTIVE
Pss Part
LOCKE LORD BISSELL LIDDELL LLP
2200 ROSS AVE - STE 2200,DALLAS,TX,US
ACTIVE
Pss Part
LORD BISSEL BROOK
111 SOUTH WACKER DR,CHICAGO,IL,US
ACTIVE
Pss Part
VILLAGE OF HOFFMAN ESTATES
1900 HASSELL RD,HOFFMAN ESTATES,IL,US
ACTIVE
Pss Part
WOODLAND SCHOOL DISTRICT 50
1105 NORTH HUNT CLUB RD,GURNEE,IL,US
ACTIVE
1 - 10 of 26 items
1 2 3
Remove

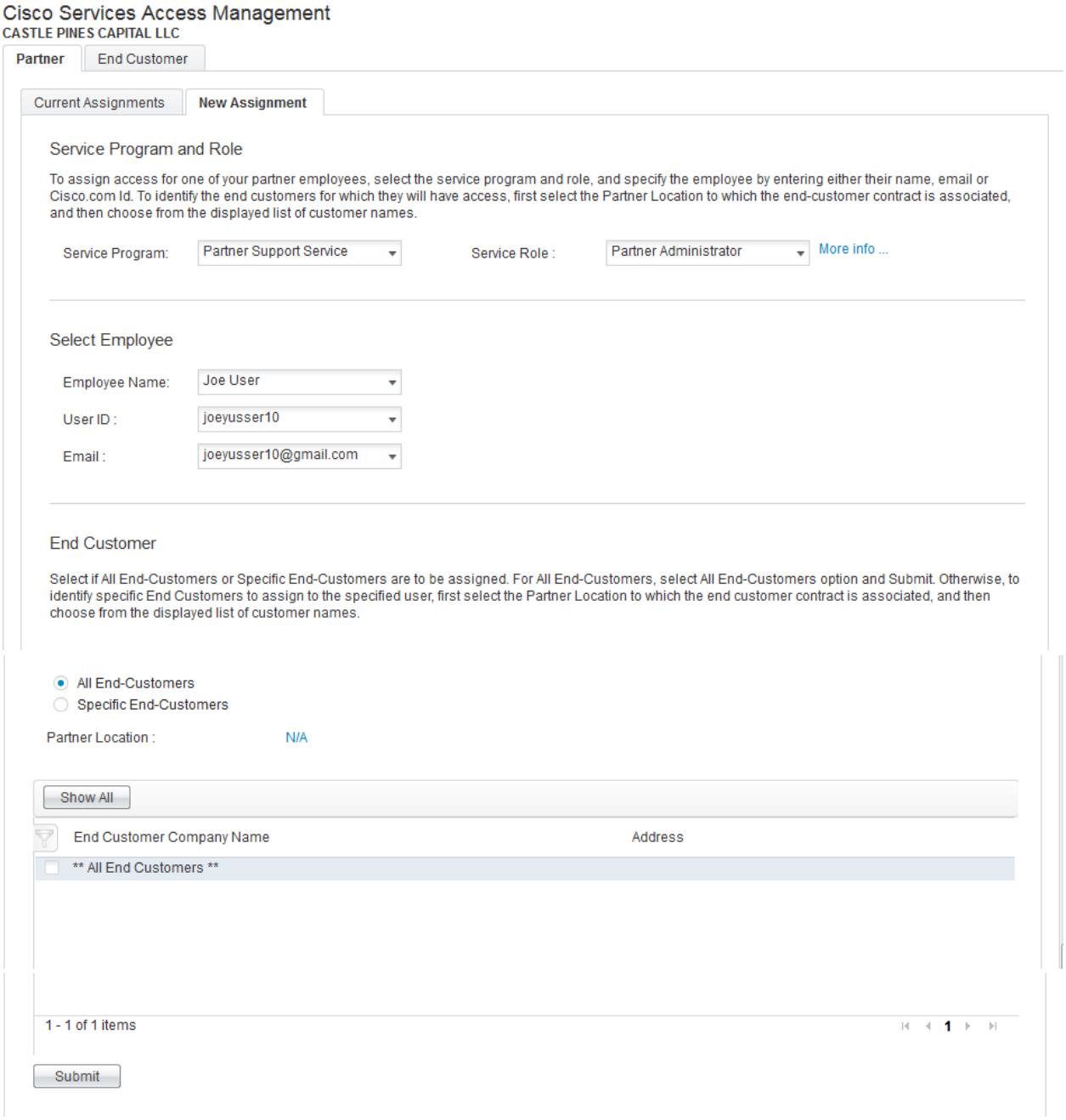

Cisco Services Access Management
CASTLE PINES CAPITAL LLC
Partner
End Customer
Current Assignments
New Assignment
Your request id# 5975 has been submitted and you will receive an email notification once the request is processed.
OK
Service Program and Role
To view existing access for your partner employee(s), select the service program and role, specify the employee by entering either their name, email Id or Cisco.com Id (optional); and/or the end-customer company name (optional) and click "Search". To remove one or more existing end-customer assignments, select the end-customer(s) and click "Remove".
* Service Program : Partner Support Service
* Service Role : Partner Administrator
More info ...
Search Service Role Assignments
Name: Pss Part
Company Name:
Email : pss_part_admin_3503@yahc
Cisco.com ID: pss_part_admin_3503
Processing ...
Search
Employee Name
End Customer Company Name
Address
Status
Pss Part AVON RUBBER PLC JOHNSON CREEK 110 LINCOLN ST,JOHNSON CREEK,WI,US ACTIVE
Pss Part CHICAGO PUBLIC SCHOOLS 125 S CLARK ST - FLOOR 14,CHICAGO,IL,US ACTIVE
Pss Part CRESCENT CROWN DISTRIBUTING 402 S 54TH PL,PHOENIX,AZ,US ACTIVE
Pss Part DUFF PHELPS INVESTMENT MANAGEMENT CO 200 S WACKER DR - FLOOR 5,CHICAGO,IL,US ACTIVE
Pss Part FIRST MIDWEST BANK 300 NORTH HUNT CLUB RD,GURNEE,IL,US ACTIVE
Pss Part LAWSON PRODUCTS INC 1666 E TOUHY AVE,DES PLAINES,IL,US ACTIVE
Pss Part LOCKE LORD BISSELL LIDDELL LLP 2200 ROSS AVE - STE 2200,DALLAS,TX,US ACTIVE
Pss Part LORD BISSEL BROOK 111 SOUTH WACKER DR,CHICAGO,IL,US ACTIVE
Pss Part VILLAGE OF HOFFMAN ESTATES 1900 HASSELL RD,HOFFMAN ESTATES,IL,US ACTIVE
Pss Part WOODLAND SCHOOL DISTRICT 50 1105 NORTH HUNT CLUB RD,GURNEE,IL,US ACTIVE
1 - 10 of 26 items
1 2 3



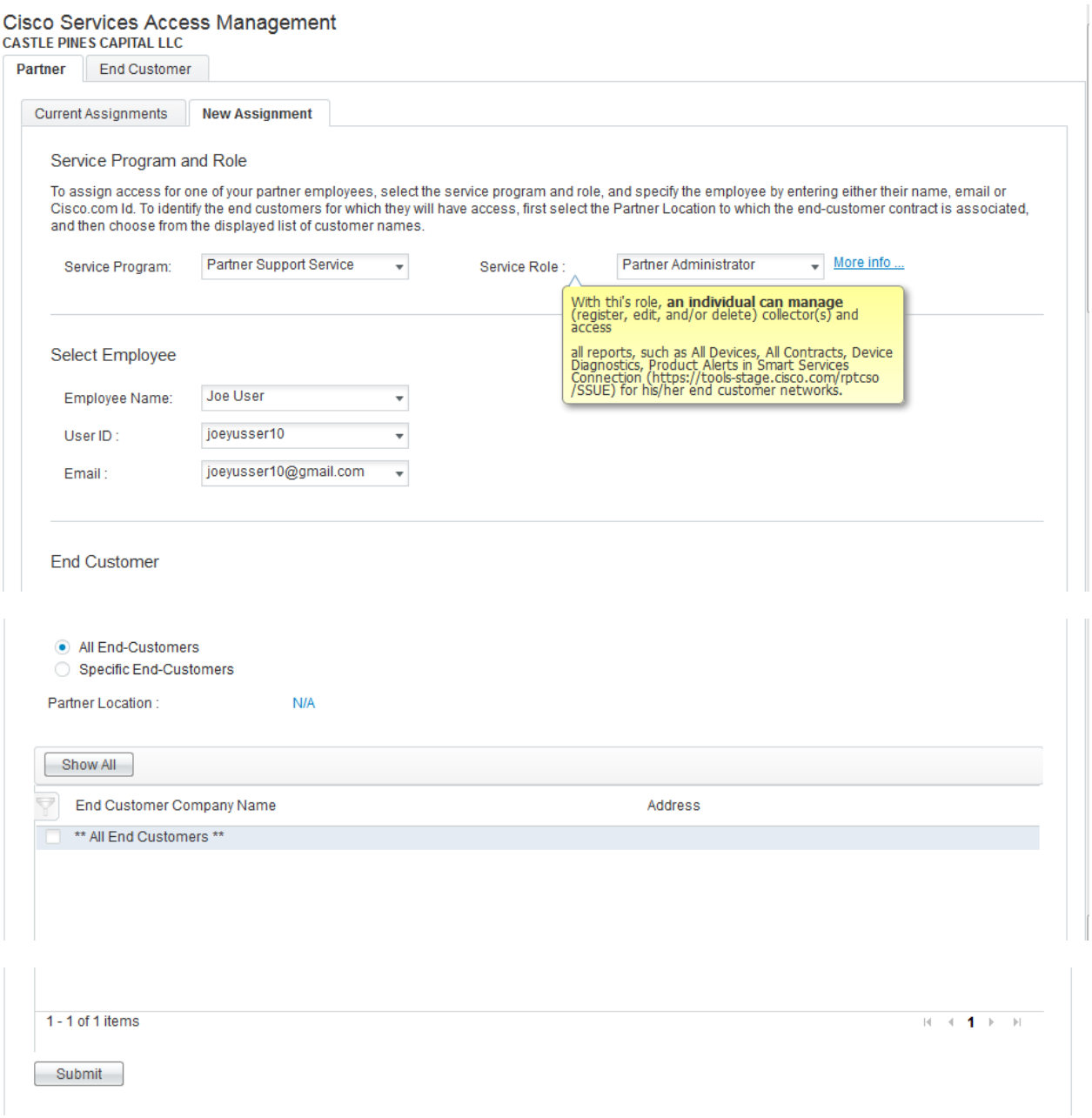
Click “OK”. The search will be automatically initiated based on the same parameters selected before the removal. The customer assignments that have been submitted for removal will no longer be listed in the Current Tab search results.

Partner-New Assignment Tab

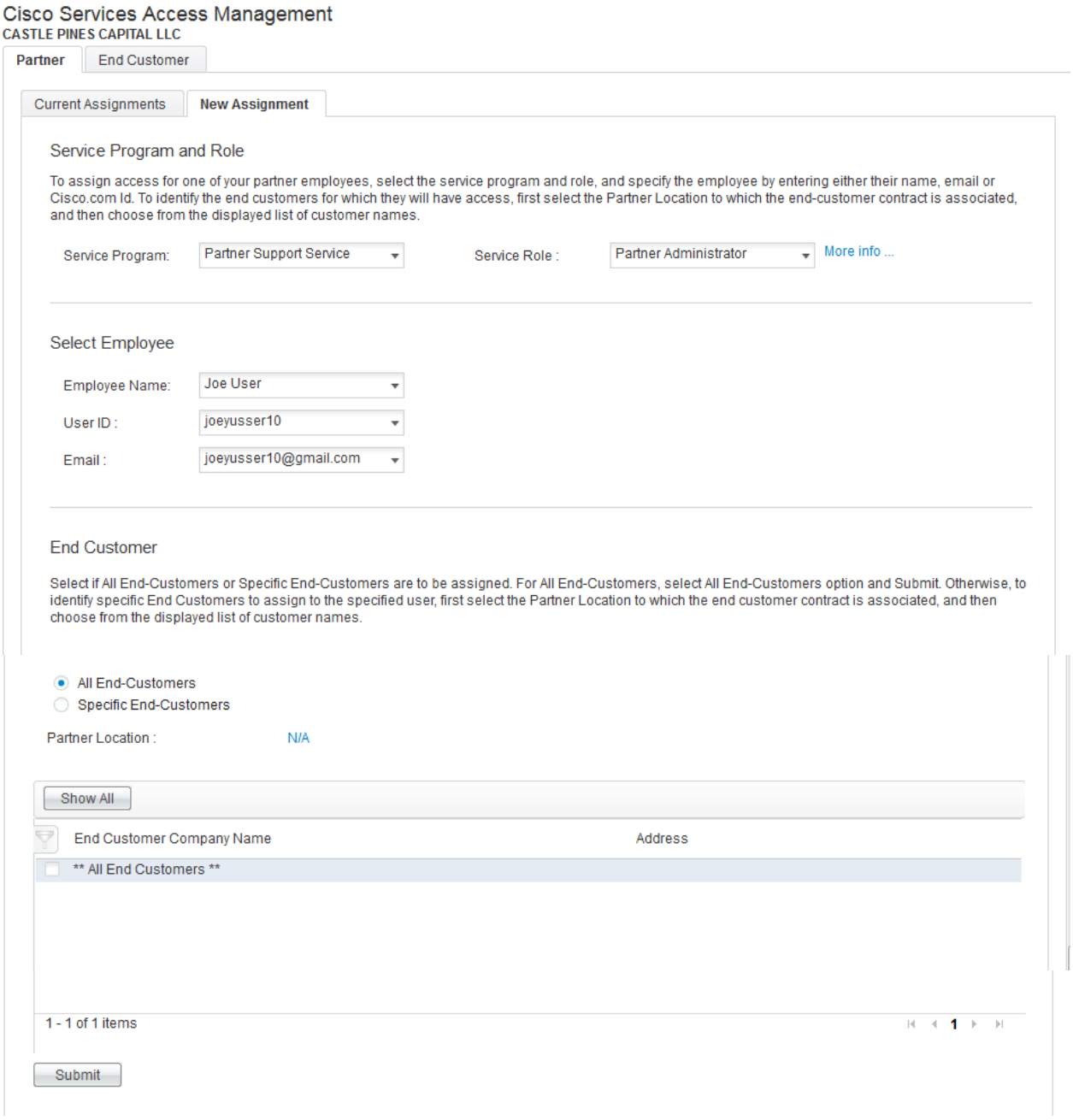
The Partner–New Assignment Tab is used to assign one or more End Customer companies to a Partner employee.



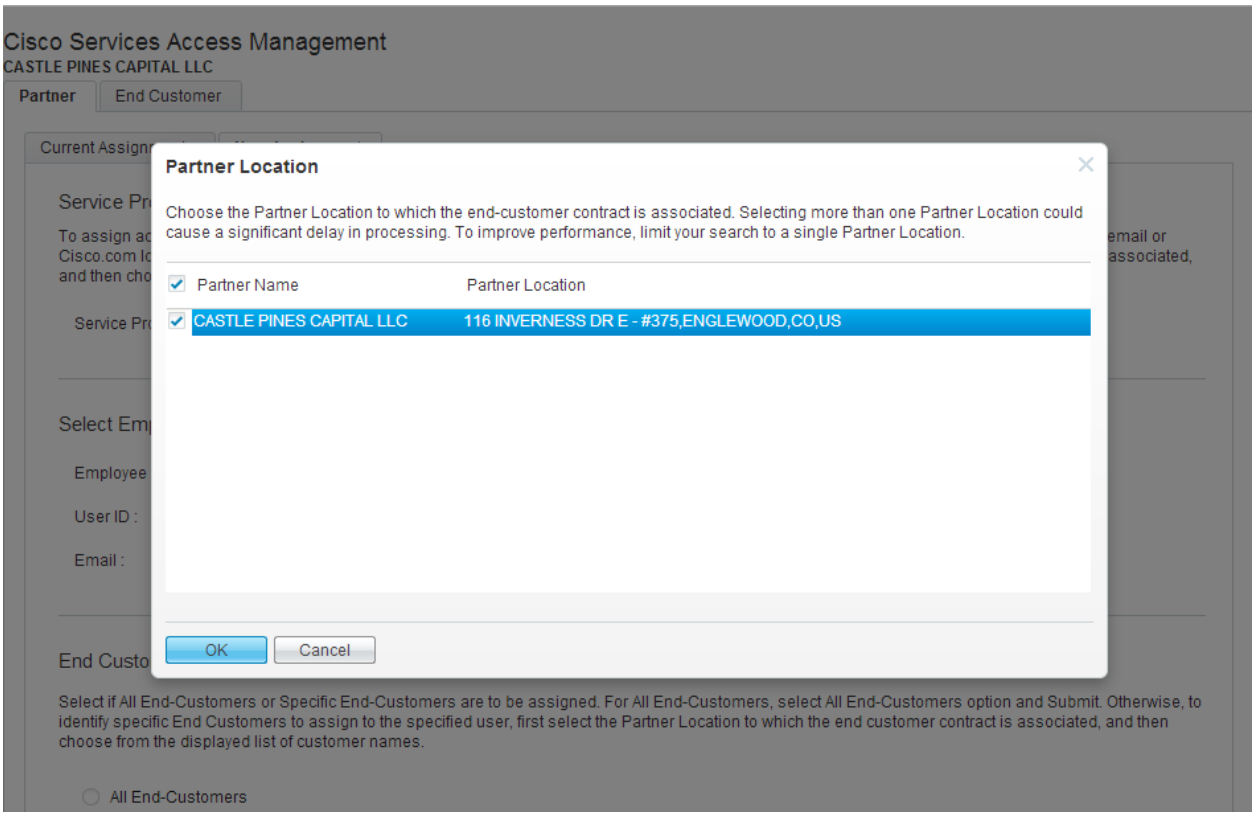
Select the Service Program and Service Role from the drop-down list of values. Use the “More info” link to display a detailed description of the Service Role.



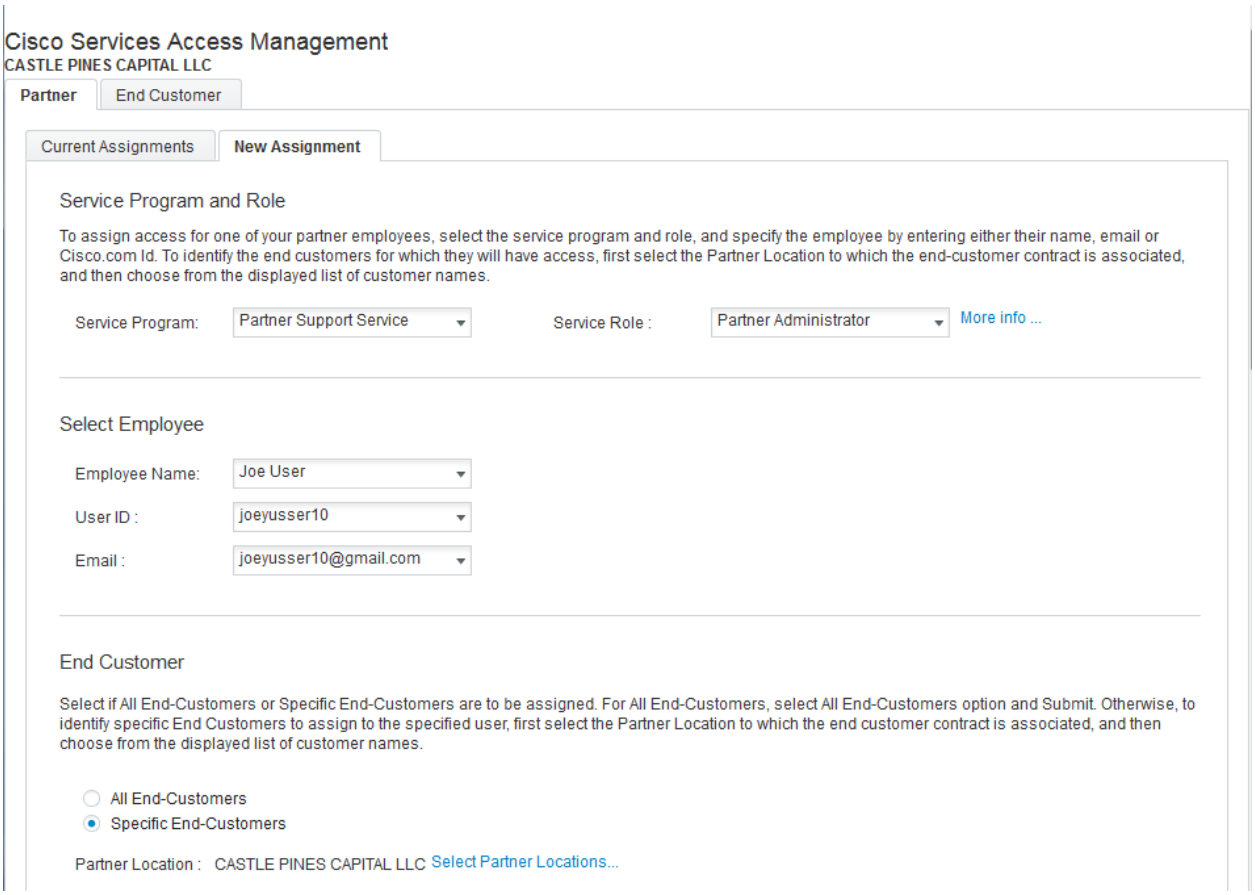
Select the user to whom you want to assign access, by searching on their Name, Email or Cisco.com ID. These auto-suggest fields will display the matching users as you start entering into any of the fields.

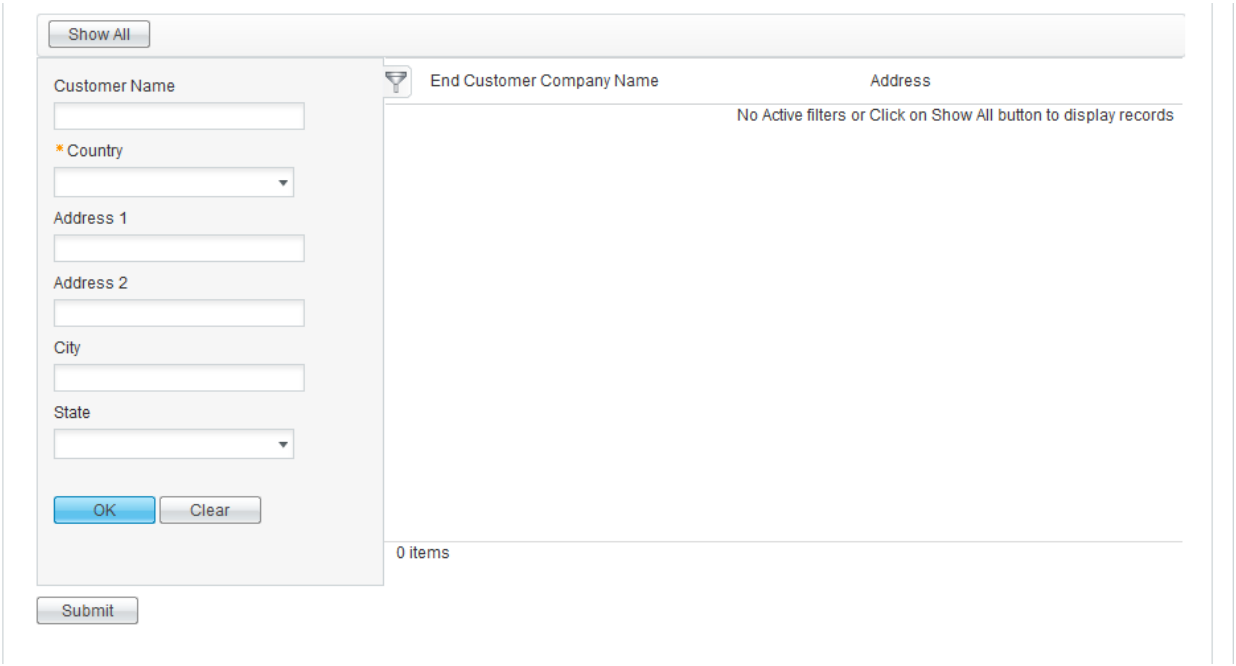


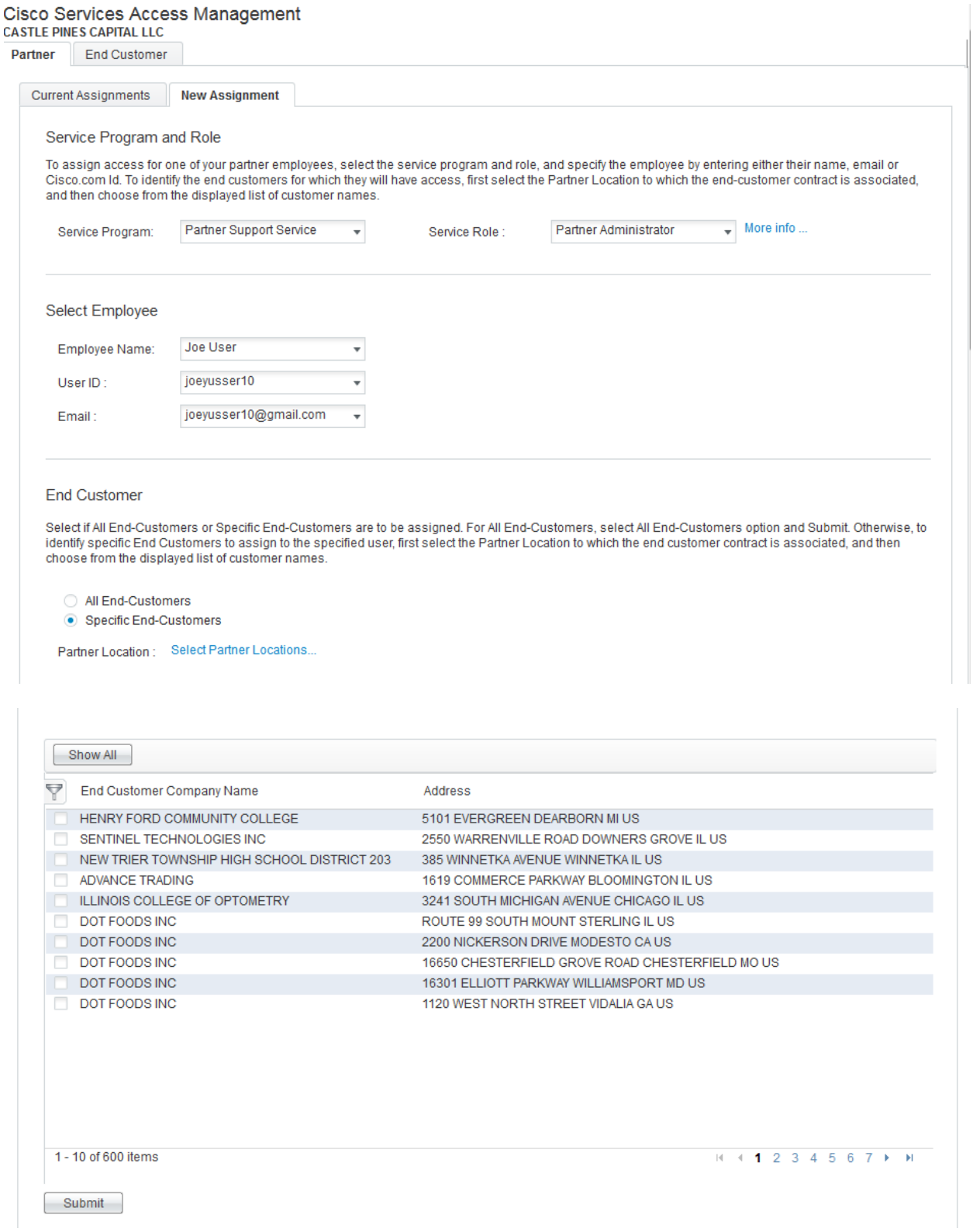
The Partner Location field is used to specify the Partner Location for which the End Customer companies are to be displayed in the search results grid. Click on the “Submit” button to initiate search for all Partner locations of the entitled partner company which will be listed in a new pop-up window. Selecting more than one Partner location can cause the response time for the search to list the End Customer companies to be much longer.



The “Filter” button could be used to narrow down the search parameters by entering the country which is a mandatory field, and any additional fields like customer name, state, city and/or address.

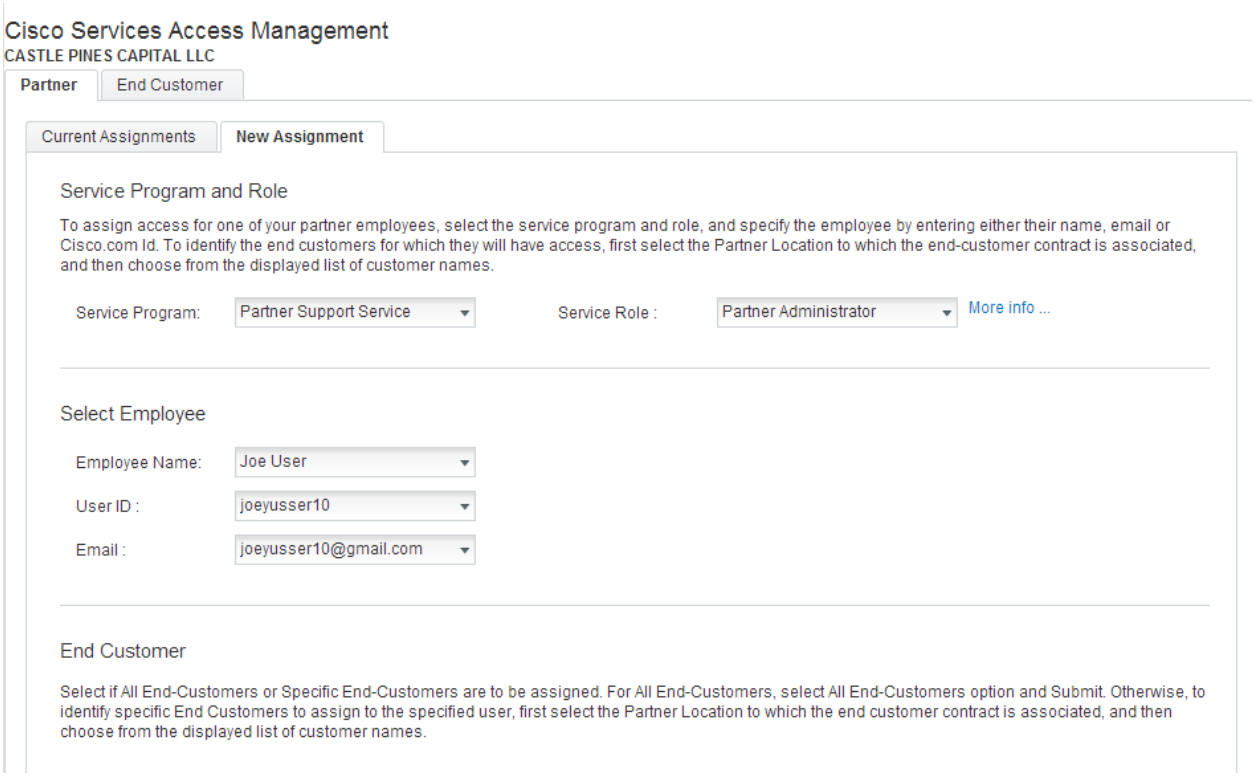

Cisco Services Access Management
CASTLE PINES CAPITAL LLC
Partner
End Customer
Current Assignments
New Assignment
Service Program and Role
To assign access for one of your partner employees, select the service program and role, and specify the employee by entering either their name, email or Cisco.com Id. To identify the end customers for which they will have access, first select the Partner Location to which the end-customer contract is associated, and then choose from the displayed list of customer names.
Service Program:
Partner Support Service
Service Role :
Partner Administrator
More info ...
Select Employee
Employee Name:
Joe User
User ID :
joeyusser10
Email :
joeyusser10@gmail.com
End Customer
Select if All End-Customers or Specific End-Customers are to be assigned. For All End-Customers, select All End-Customers option and Submit. Otherwise, to identify specific End Customers to assign to the specified user, first select the Partner Location to which the end customer contract is associated, and then choose from the displayed list of customer names.
All End-Customers
Specific End-Customers
Partner Location : CASTLE PINES CAPITAL LLC
Select Partner Locations...

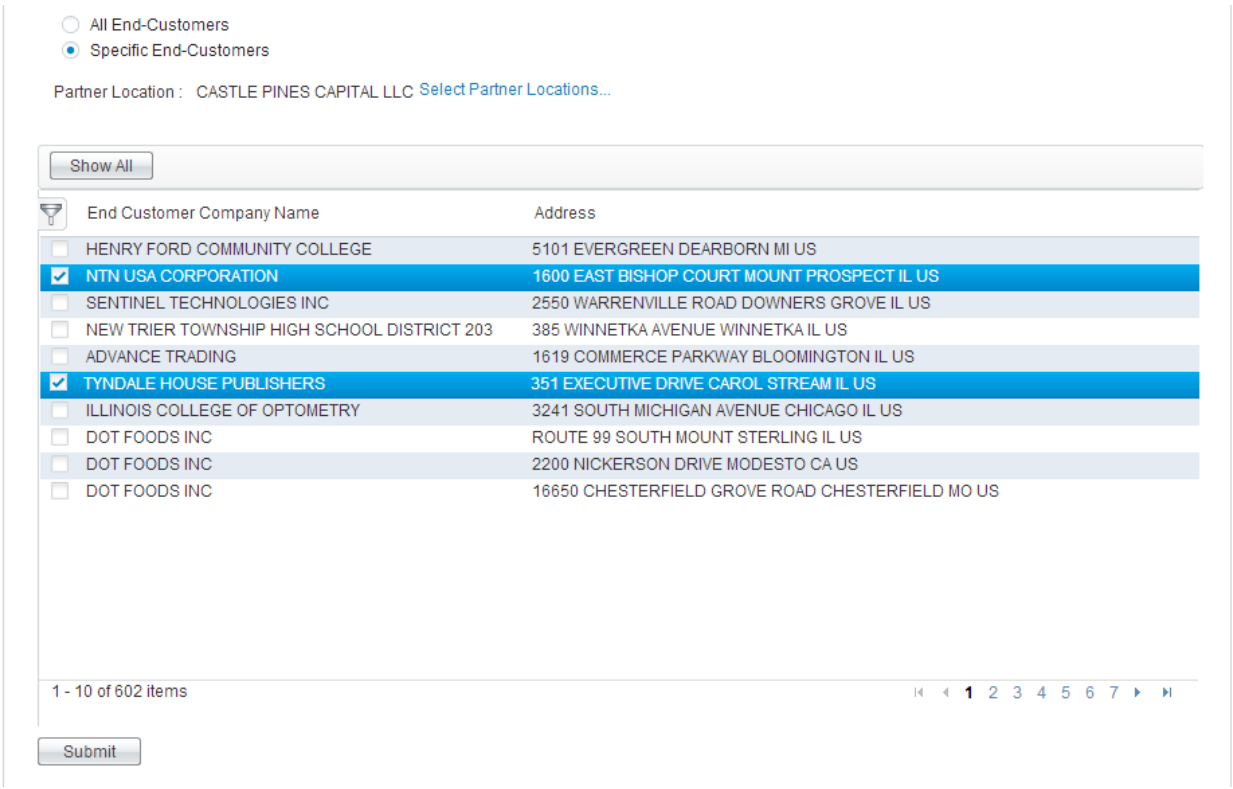

Show All
Customer Name
* Country
Address 1
Address 2
City
State
OK
Clear
End Customer Company Name
Address
No Active filters or Click on Show All button to display records
0 items
Submit

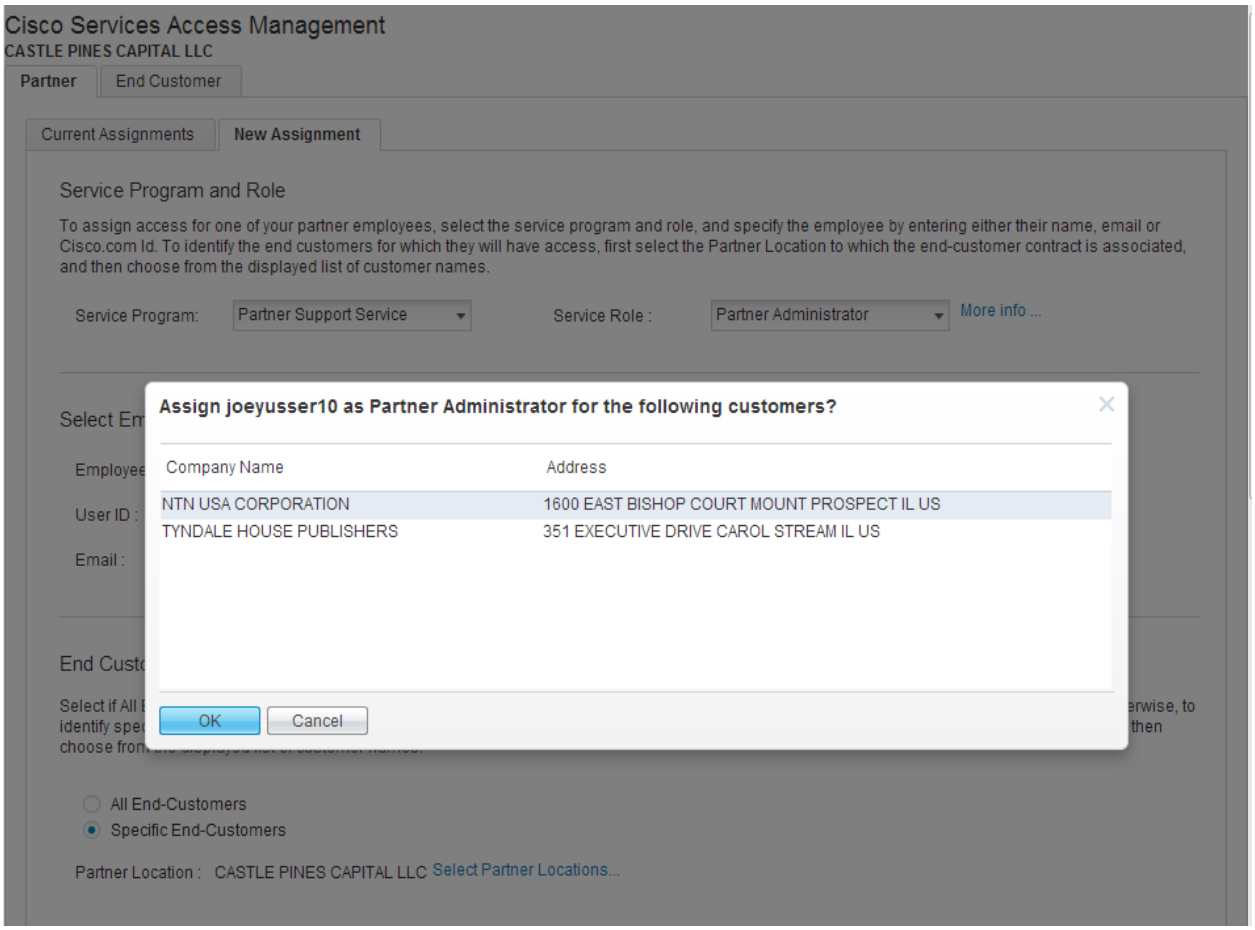

Cisco Services Access Management
CASTLE PINES CAPITAL LLC
Partner
End Customer
Current Assignments
New Assignment
Service Program and Role
To assign access for one of your partner employees, select the service program and role, and specify the employee by entering either their name, email or Cisco.com Id. To identify the end customers for which they will have access, first select the Partner Location to which the end-customer contract is associated, and then choose from the displayed list of customer names.
Service Program:
Partner Support Service
Service Role :
Partner Administrator
More info ...
Select Employee
Employee Name:
Joe User
User ID :
joeyusser10
Email :
joeyusser10@gmail.com
End Customer
Select if All End-Customers or Specific End-Customers are to be assigned. For All End-Customers, select All End-Customers option and Submit. Otherwise, to identify specific End Customers to assign to the specified user, first select the Partner Location to which the end customer contract is associated, and then choose from the displayed list of customer names.
All End-Customers
Specific End-Customers
Partner Location :
Select Partner Locations...
Show All
End Customer Company Name
Address
HENRY FORD COMMUNITY COLLEGE
5101 EVERGREEN DEARBORN MI US
SENTINEL TECHNOLOGIES INC
2550 WARRENVILLE ROAD DOWNERS GROVE IL US
NEW TRIER TOWNSHIP HIGH SCHOOL DISTRICT 203
385 WINNETKA AVENUE WINNETKA IL US
ADVANCE TRADING
1619 COMMERCE PARKWAY BLOOMINGTON IL US
ILLINOIS COLLEGE OF OPTOMETRY
3241 SOUTH MICHIGAN AVENUE CHICAGO IL US
DOT FOODS INC
ROUTE 99 SOUTH MOUNT STERLING IL US
DOT FOODS INC
2200 NICKERSON DRIVE MODESTO CA US
DOT FOODS INC
16650 CHESTERFIELD GROVE ROAD CHESTERFIELD MO US
DOT FOODS INC
16301 ELLIOTT PARKWAY WILLIAMSPORT MD US
DOT FOODS INC
1120 WEST NORTH STREET VIDALIA GA US
1 - 10 of 600 items
1 2 3 4 5 6 7
Submit

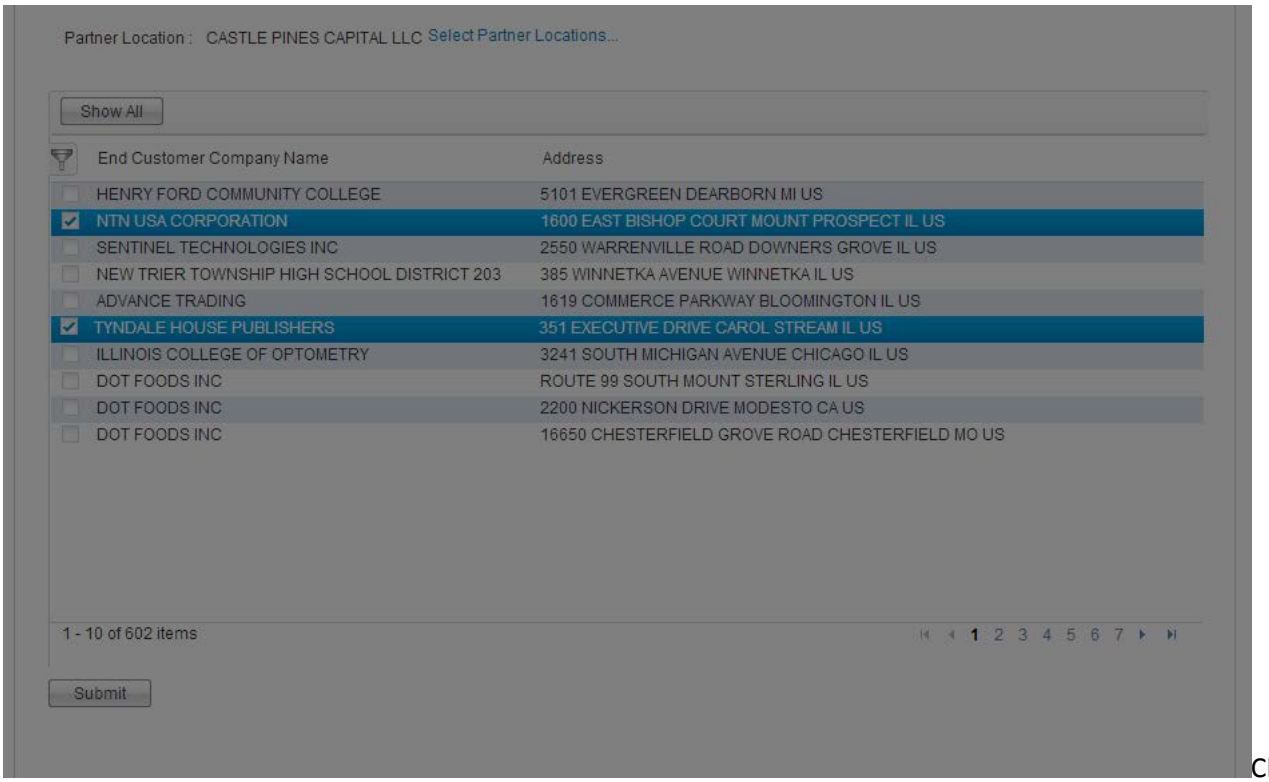
To search and list *all* the End Customers for the selected Partner location, do not select any Filter condition, or if it was selected earlier, click on “Clear Filter” button, then click on the “Go” button.

Select which customers are to be assigned from the search results displayed, and click on “Submit”.



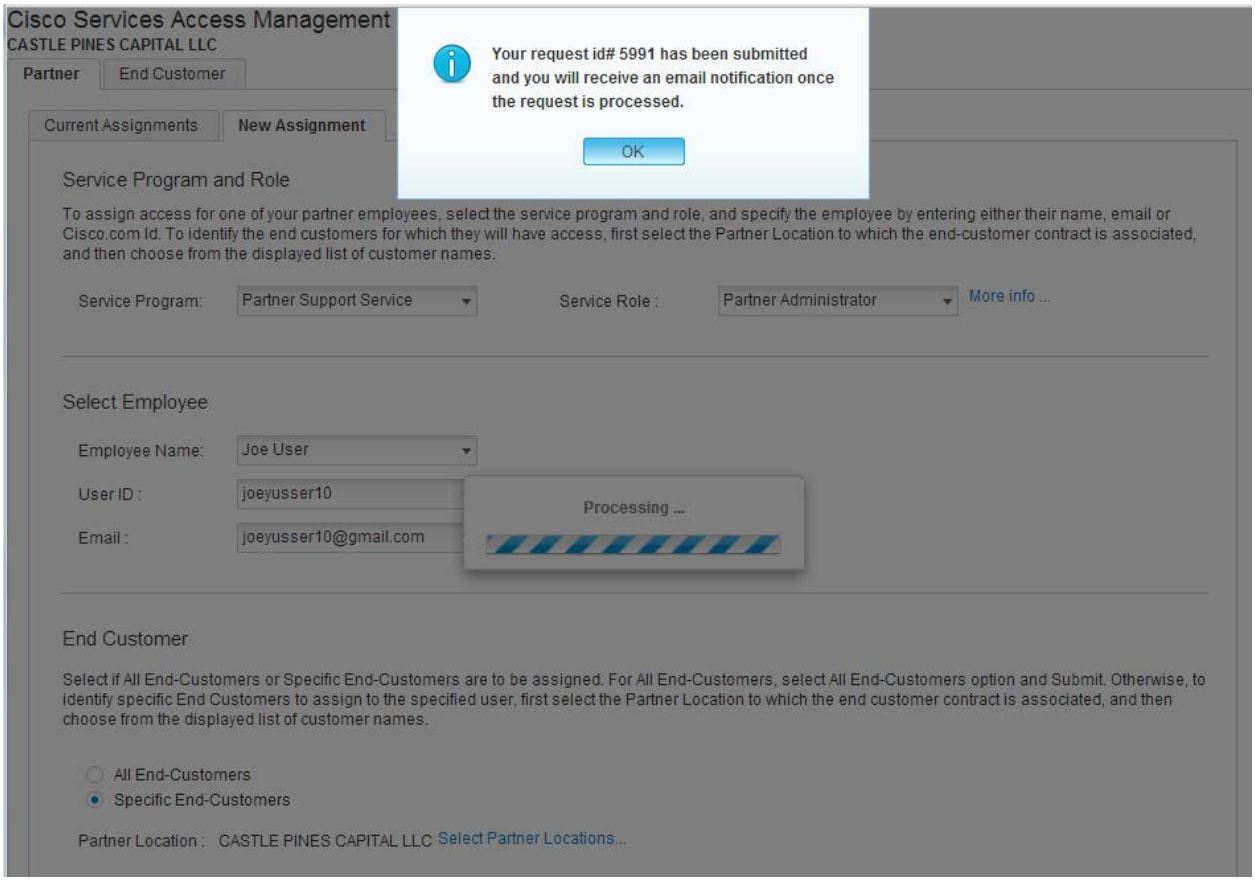

All End-Customers
Specific End-Customers
Partner Location : CASTLE PINES CAPITAL LLC Select Partner Locations...
Show All
End Customer Company Name
Address
HENRY FORD COMMUNITY COLLEGE 5101 EVERGREEN DEARBORN MI US
NTN USA CORPORATION 1600 EAST BISHOP COURT MOUNT PROSPECT IL US
SENTINEL TECHNOLOGIES INC 2550 WARRENVILLE ROAD DOWNERS GROVE IL US
NEW TRIER TOWNSHIP HIGH SCHOOL DISTRICT 203 385 WINNETKA AVENUE WINNETKA IL US
ADVANCE TRADING 1619 COMMERCE PARKWAY BLOOMINGTON IL US
TYNDALE HOUSE PUBLISHERS 351 EXECUTIVE DRIVE CAROL STREAM IL US
ILLINOIS COLLEGE OF OPTOMETRY 3241 SOUTH MICHIGAN AVENUE CHICAGO IL US
DOT FOODS INC ROUTE 99 SOUTH MOUNT STERLING IL US
DOT FOODS INC 2200 NICKERSON DRIVE MODESTO CA US
DOT FOODS INC 16650 CHESTERFIELD GROVE ROAD CHESTERFIELD MO US
1 - 10 of 602 items
1 2 3 4 5 6 7
Submit


Cisco Services Access Management
CASTLE PINES CAPITAL LLC
Partner
End Customer
Current Assignments
New Assignment
Service Program and Role
To assign access for one of your partner employees, select the service program and role, and specify the employee by entering either their name, email or Cisco.com Id. To identify the end customers for which they will have access, first select the Partner Location to which the end-customer contract is associated, and then choose from the displayed list of customer names.
Service Program:
Partner Support Service
Service Role :
Partner Administrator
More info ...
Assign joeyusser10 as Partner Administrator for the following customers?
Company Name
Address
NTN USA CORPORATION
1600 EAST BISHOP COURT MOUNT PROSPECT IL US
TYNDALE HOUSE PUBLISHERS
351 EXECUTIVE DRIVE CAROL STREAM IL US
OK
Cancel
All End-Customers
Specific End-Customers
Partner Location : CASTLE PINES CAPITAL LLC
Select Partner Locations...

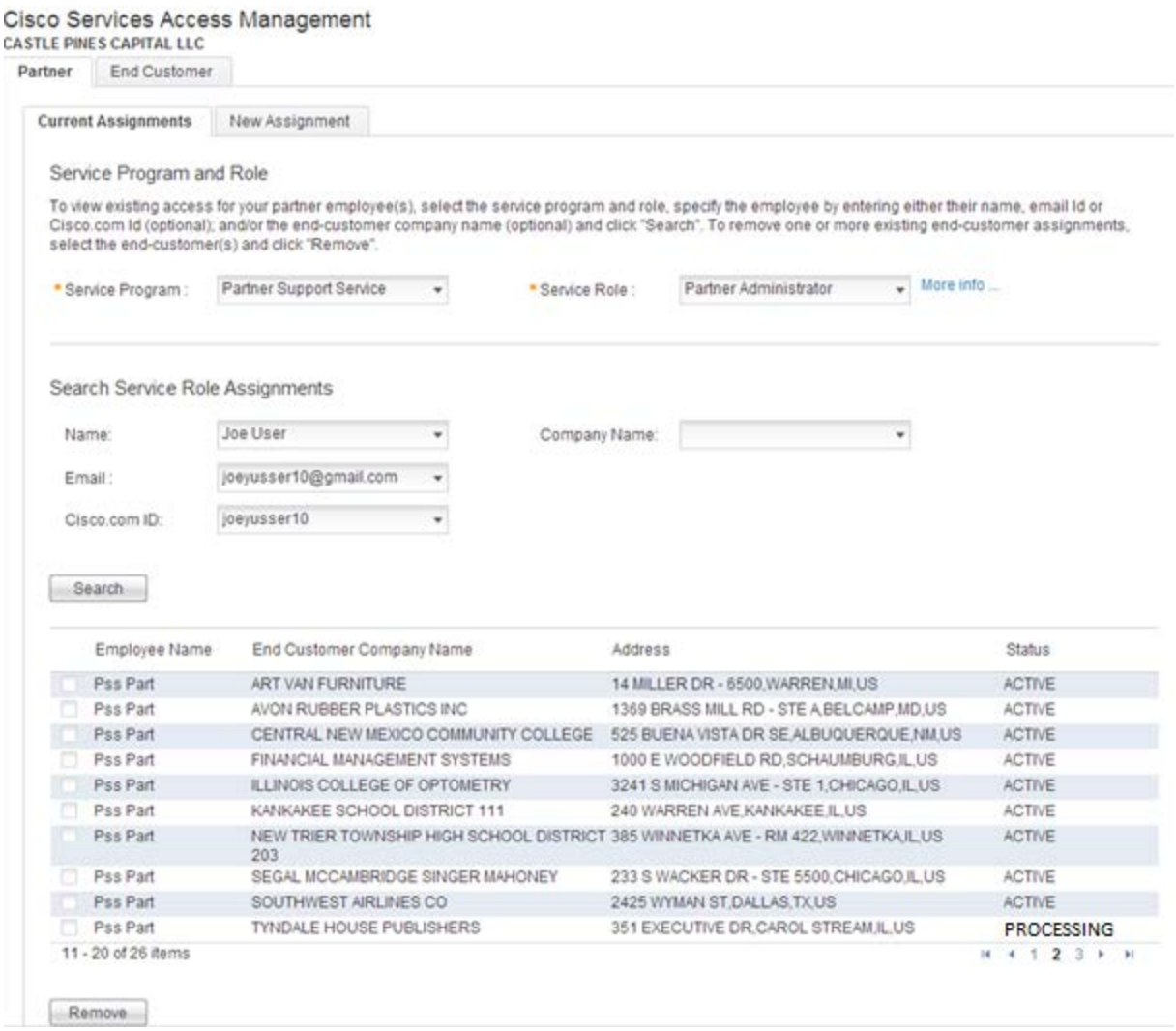

Partner Location : CASTLE PINES CAPITAL LLC
Select Partner Locations...
Show All
End Customer Company Name
Address
HENRY FORD COMMUNITY COLLEGE
5101 EVERGREEN DEARBORN MI US
NTN USA CORPORATION
1600 EAST BISHOP COURT MOUNT PROSPECT IL US
SENTINEL TECHNOLOGIES INC
2550 WARRENVILLE ROAD DOWNERS GROVE IL US
NEW TRIER TOWNSHIP HIGH SCHOOL DISTRICT 203
385 WINNETKA AVENUE WINNETKA IL US
ADVANCE TRADING
1619 COMMERCE PARKWAY BLOOMINGTON IL US
TYNDALE HOUSE PUBLISHERS
351 EXECUTIVE DRIVE CAROL STREAM IL US
ILLINOIS COLLEGE OF OPTOMETRY
3241 SOUTH MICHIGAN AVENUE CHICAGO IL US
DOT FOODS INC
ROUTE 99 SOUTH MOUNT STERLING IL US
DOT FOODS INC
2200 NICKERSON DRIVE MODESTO CA US
DOT FOODS INC
16650 CHESTERFIELD GROVE ROAD CHESTERFIELD MO US
1 - 10 of 602 items
1 2 3 4 5 6 7
Submit

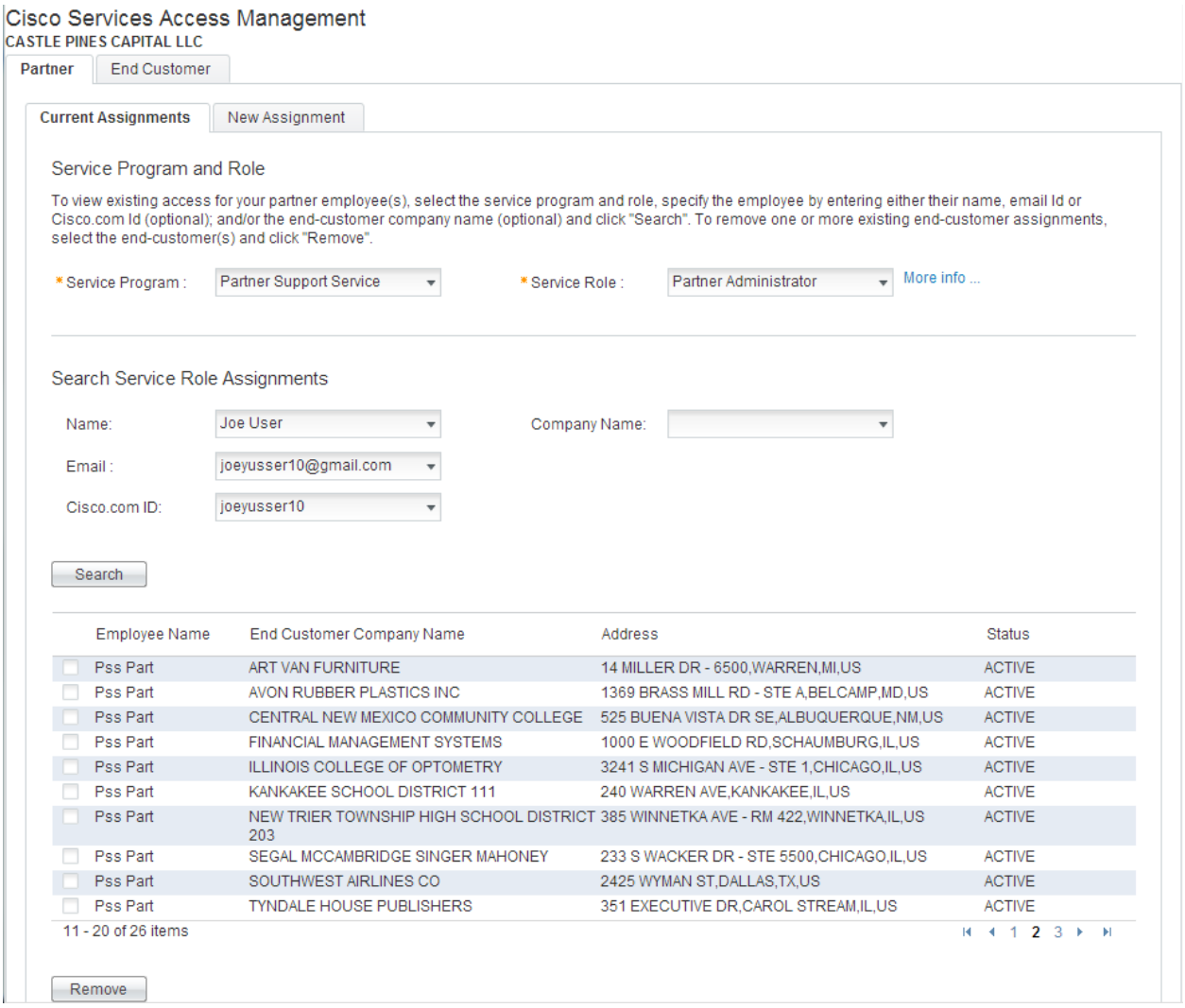
Click

on “OK” to confirm assignment per what is listed. A pop-up message with the Request Id# will be displayed.



Click “OK”. This will initiate a search automatically based on the same parameters that were specified before the assignment request was submitted. The customer assignments that have already been submitted for assignment will no longer be listed in the New Assignment Tab search results and instead will appear in the Partner-Current tab with a status of “Processing” if the processing is going-on, or it will have a status of “Active” if the processing is completed successfully.

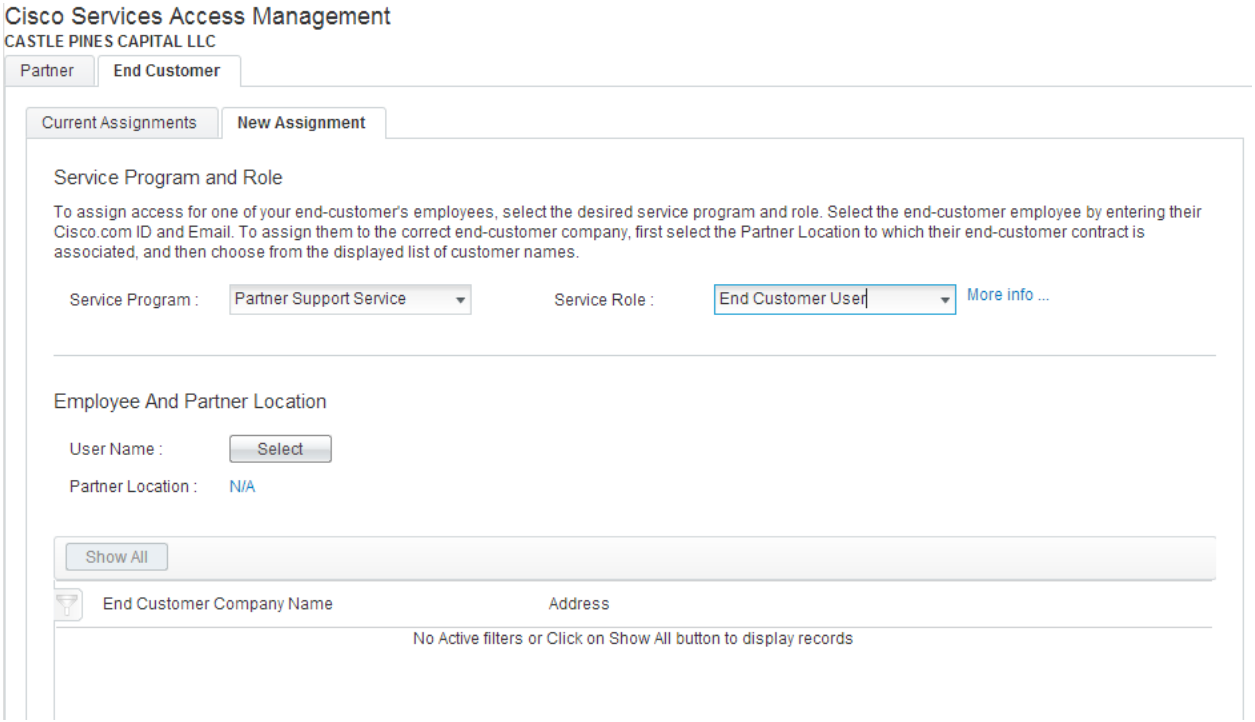

Cisco Services Access Management
CASTLE PINES CAPITAL LLC
Partner
End Customer
Current Assignments
New Assignment
Service Program and Role
To view existing access for your partner employee(s), select the service program and role, specify the employee by entering either their name, email Id or Cisco.com Id (optional); and/or the end-customer company name (optional) and click "Search". To remove one or more existing end-customer assignments, select the end-customer(s) and click "Remove".
* Service Program :
Partner Support Service
* Service Role :
Partner Administrator
More info ...
Search Service Role Assignments
Name:
Joe User
Company Name:
Email :
joeyusser10@gmail.com
Cisco.com ID:
joeyusser10
Search
Employee Name
End Customer Company Name
Address
Status
Pss Part
ART VAN FURNITURE
14 MILLER DR - 6500,WARREN,MI,US
ACTIVE
Pss Part
AVON RUBBER PLASTICS INC
1369 BRASS MILL RD - STE A,BELCAMP,MD,US
ACTIVE
Pss Part
CENTRAL NEW MEXICO COMMUNITY COLLEGE
525 BUENA VISTA DR SE,ALBUQUERQUE,NM,US
ACTIVE
Pss Part
FINANCIAL MANAGEMENT SYSTEMS
1000 E WOODFIELD RD,SCHAUMBURG,IL,US
ACTIVE
Pss Part
ILLINOIS COLLEGE OF OPTOMETRY
3241 S MICHIGAN AVE - STE 1,CHICAGO,IL,US
ACTIVE
Pss Part
KANKAKEE SCHOOL DISTRICT 111
240 WARREN AVE,KANKAKEE,IL,US
ACTIVE
Pss Part
NEW TRIER TOWNSHIP HIGH SCHOOL DISTRICT 203
385 WINNETKA AVE - RM 422,WINNETKA,IL,US
ACTIVE
Pss Part
SEGAL MCCAMBRIDGE SINGER MAHONEY
233 S WACKER DR - STE 5500,CHICAGO,IL,US
ACTIVE
Pss Part
SOUTHWEST AIRLINES CO
2425 WYMAN ST,DALLAS,TX,US
ACTIVE
Pss Part
TYNDALE HOUSE PUBLISHERS
351 EXECUTIVE DR,CAROL STREAM,IL,US
PROCESSING
11 - 20 of 26 items
1 2 3
Remove


Cisco Services Access Management
CASTLE PINES CAPITAL LLC
Partner
End Customer
Current Assignments
New Assignment
Service Program and Role
To view existing access for your partner employee(s), select the service program and role, specify the employee by entering either their name, email Id or Cisco.com Id (optional); and/or the end-customer company name (optional) and click "Search". To remove one or more existing end-customer assignments, select the end-customer(s) and click "Remove".
* Service Program : Partner Support Service
* Service Role : Partner Administrator
More info ...
Search Service Role Assignments
Name: Joe User
Company Name:
Email : joeyusser10@gmail.com
Cisco.com ID: joeyusser10
Search
Employee Name | End Customer Company Name | Address | Status
Pss Part | ART VAN FURNITURE | 14 MILLER DR - 6500,WARREN,MI,US | ACTIVE
Pss Part | AVON RUBBER PLASTICS INC | 1369 BRASS MILL RD - STE A,BELCAMP,MD,US | ACTIVE
Pss Part | CENTRAL NEW MEXICO COMMUNITY COLLEGE | 525 BUENA VISTA DR SE,ALBUQUERQUE,NM,US | ACTIVE
Pss Part | FINANCIAL MANAGEMENT SYSTEMS | 1000 E WOODFIELD RD,SCHAUMBURG,IL,US | ACTIVE
Pss Part | ILLINOIS COLLEGE OF OPTOMETRY | 3241 S MICHIGAN AVE - STE 1,CHICAGO,IL,US | ACTIVE
Pss Part | KANKAKEE SCHOOL DISTRICT 111 | 240 WARREN AVE,KANKAKEE,IL,US | ACTIVE
Pss Part | NEW TRIER TOWNSHIP HIGH SCHOOL DISTRICT 203 | 385 WINNETKA AVE - RM 422,WINNETKA,IL,US | ACTIVE
Pss Part | SEGAL MCCAMBRIDGE SINGER MAHONEY | 233 S WACKER DR - STE 5500,CHICAGO,IL,US | ACTIVE
Pss Part | SOUTHWEST AIRLINES CO | 2425 WYMAN ST,DALLAS,TX,US | ACTIVE
Pss Part | TYNDALE HOUSE PUBLISHERS | 351 EXECUTIVE DR,CAROL STREAM,IL,US | ACTIVE
11 - 20 of 26 items
1 2 3
Remove

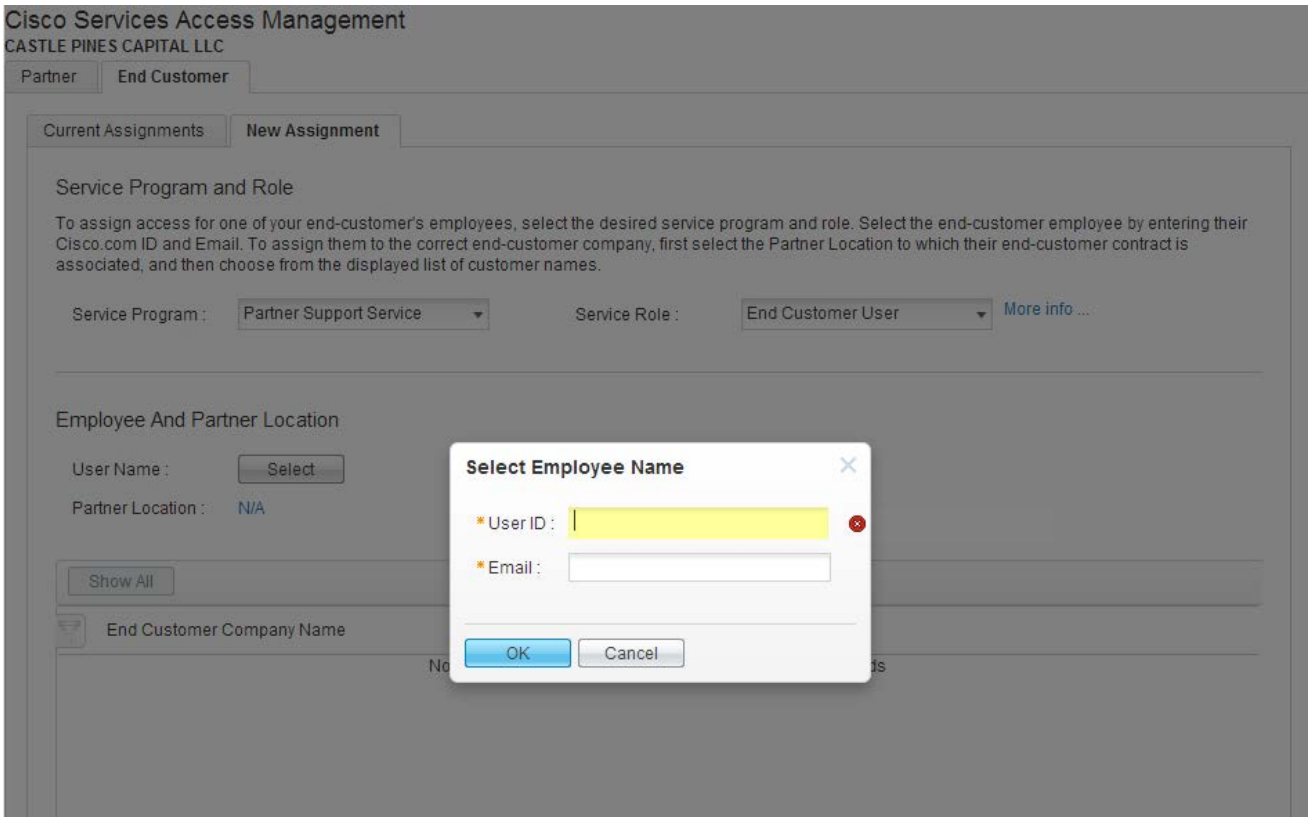
End-Customer - New Assignment Tab

A Partner administrator can assign access to a user at one of their End-Customer companies using the End-Customer - New Assignment Tab.

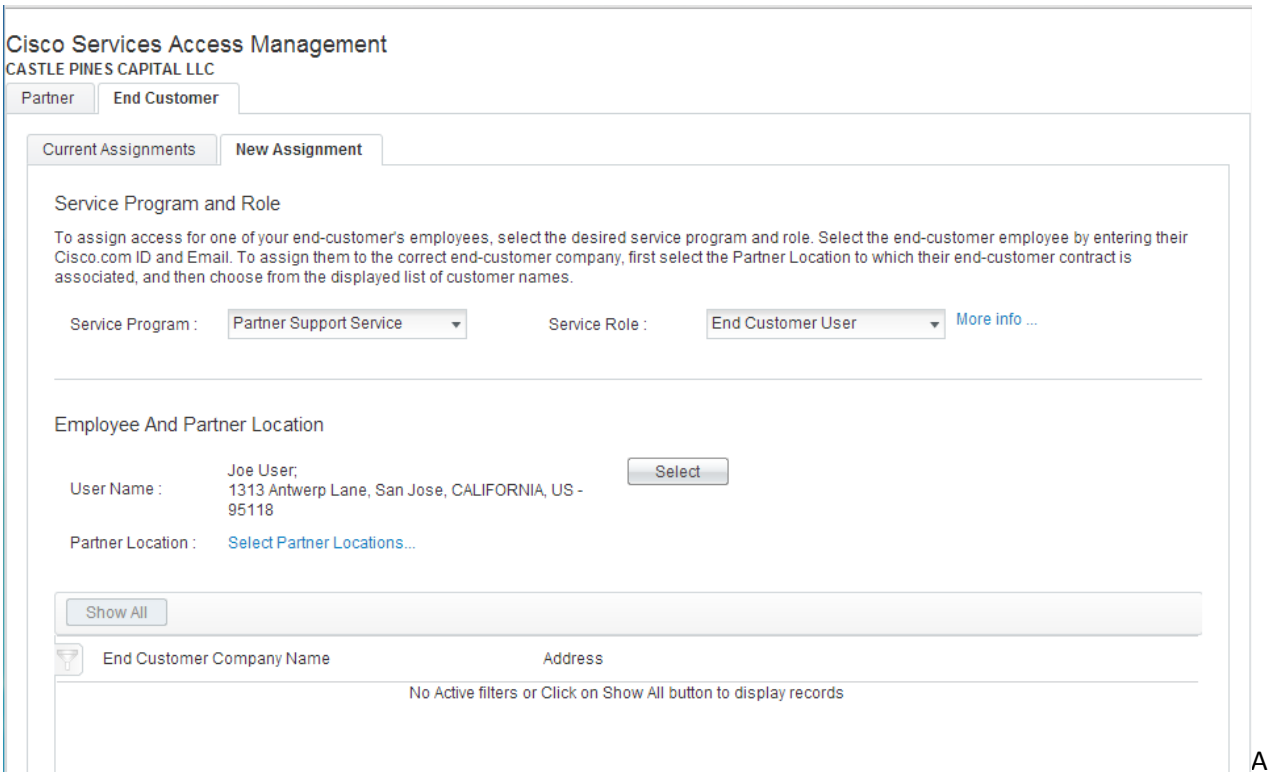
Select the Service Program and Service Role from the drop-down list. Click on the “More info” link to display the description of the Service Role.



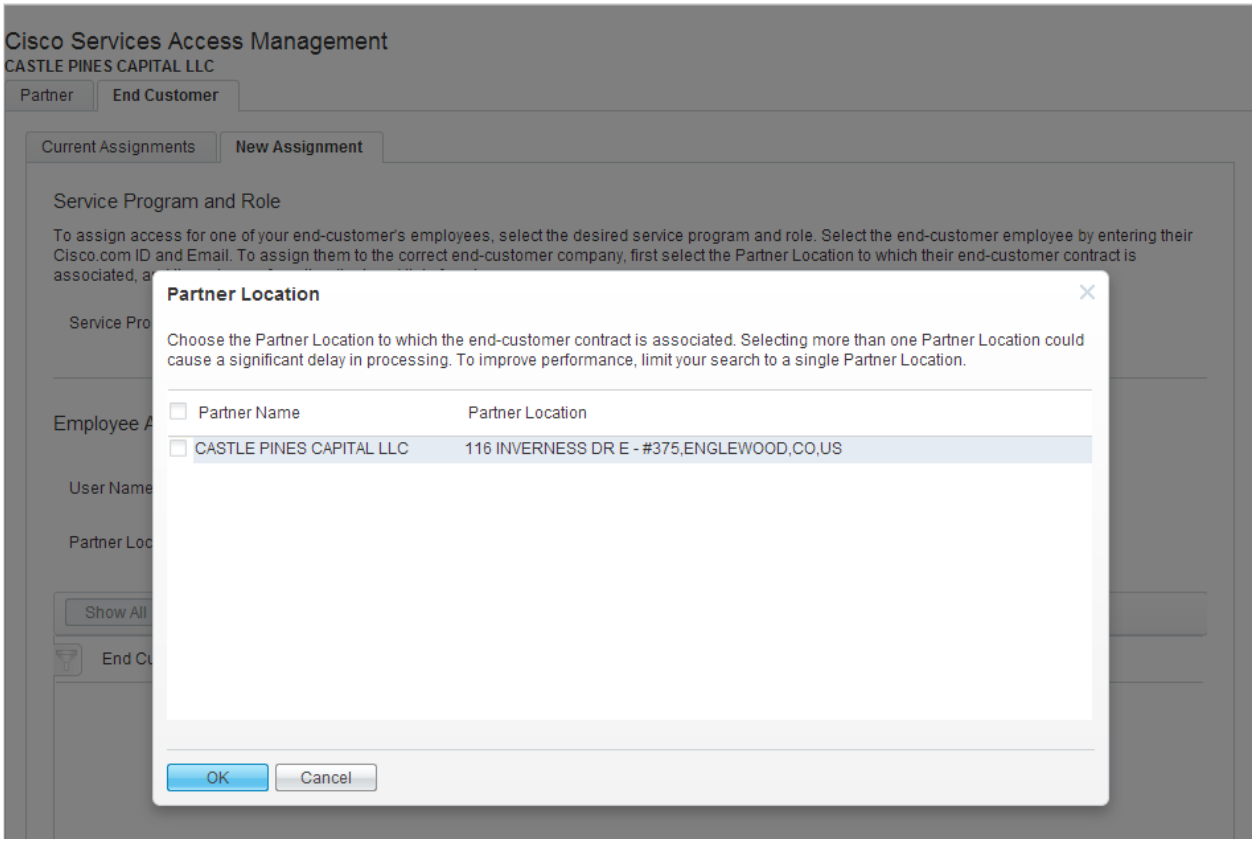
Specify the End-Customer employee by clicking on the Select button. In the pop-up window, identify the End-Customer employee by entering their User ID (Cisco.com ID) and Email address, then click “OK”.



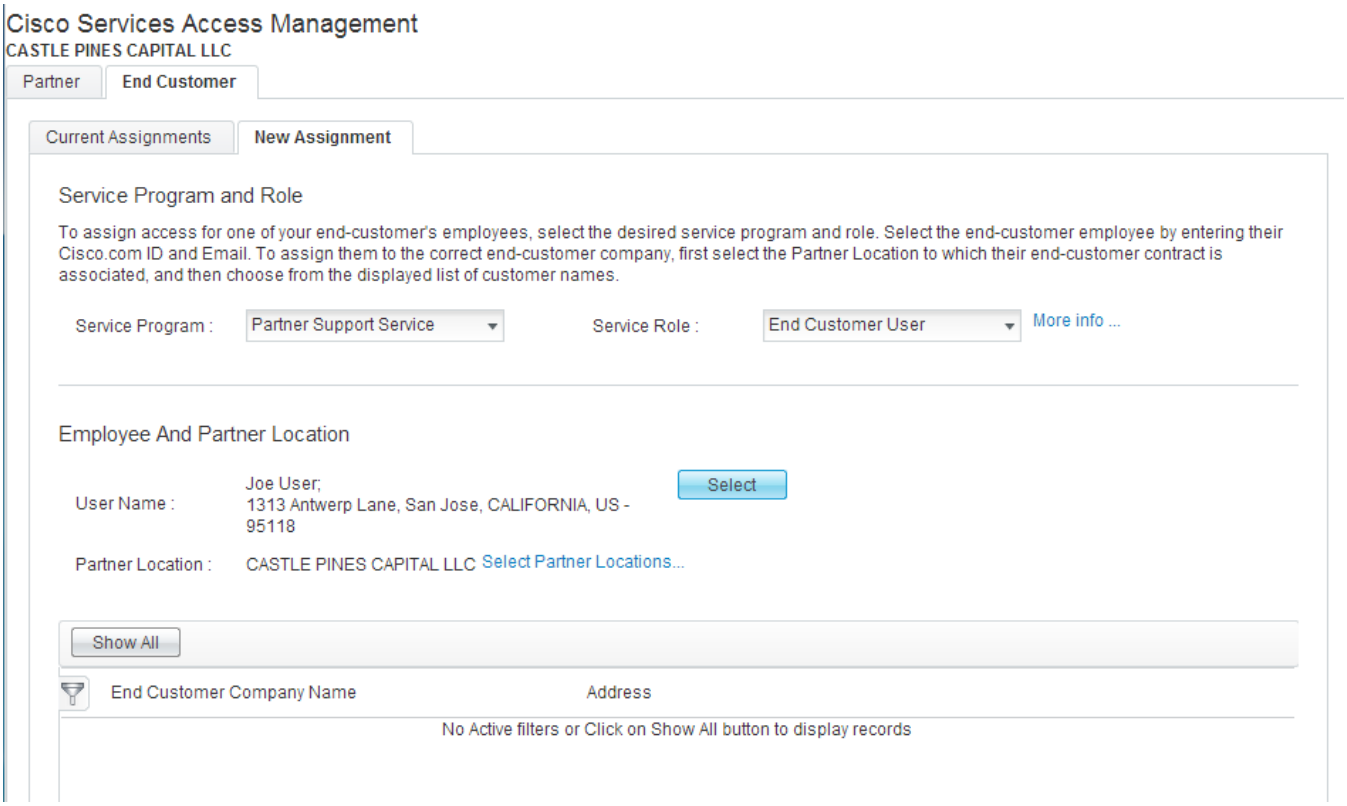
If the User ID and email address are valid, the specified End-Customer User is selected, the pop-up window is closed and the User Name, Job Title and Address is displayed for confirmation.

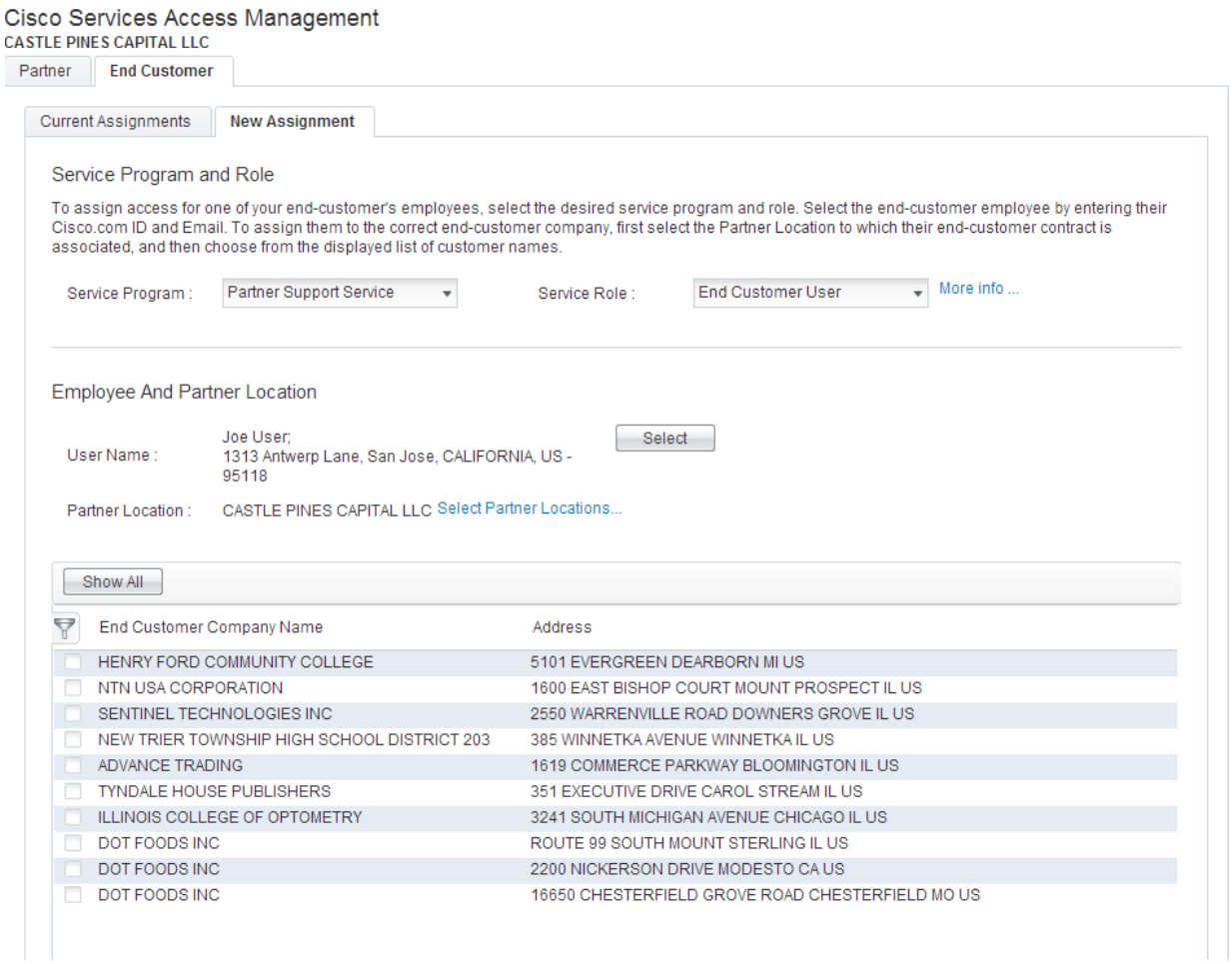


A Partner's End Customer companies are logically grouped by the Partner company locations (Bill-To-IDs) on the service contracts. Click "Select" to display and choose from the list of your partner locations.

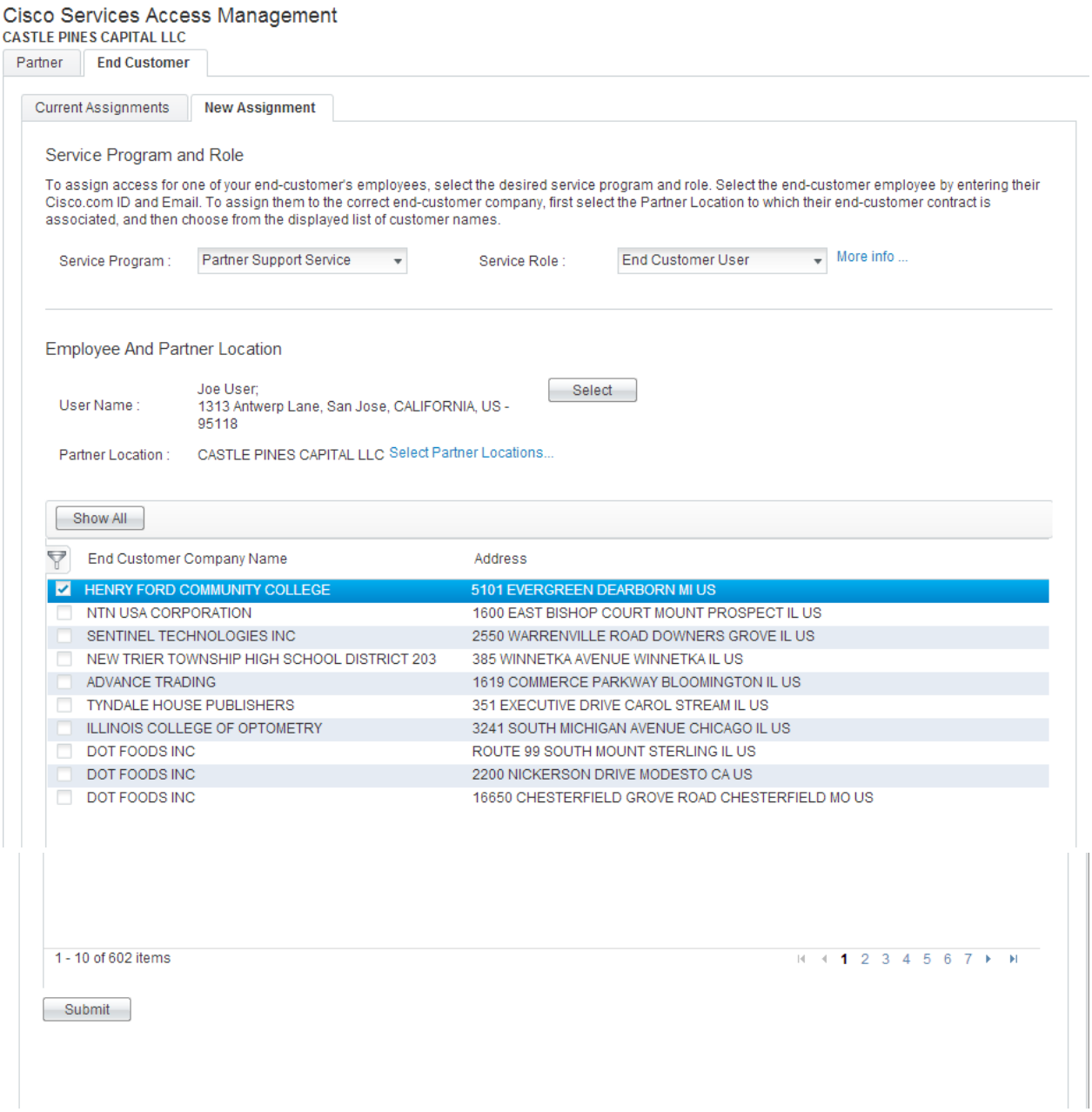


Note: Selecting multiple Partner company locations may dramatically increase the number of corresponding End Customer companies that will then be displayed, which will adversely affect system response time.

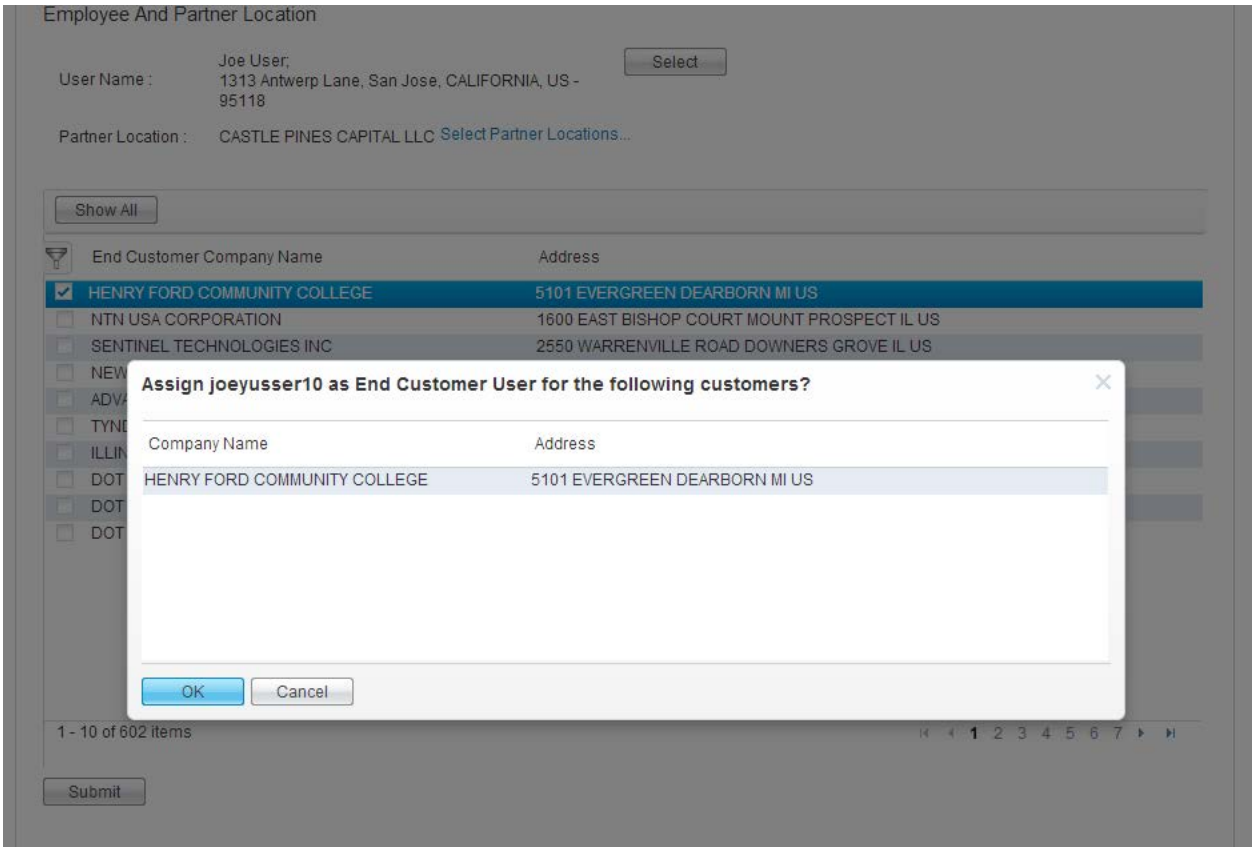


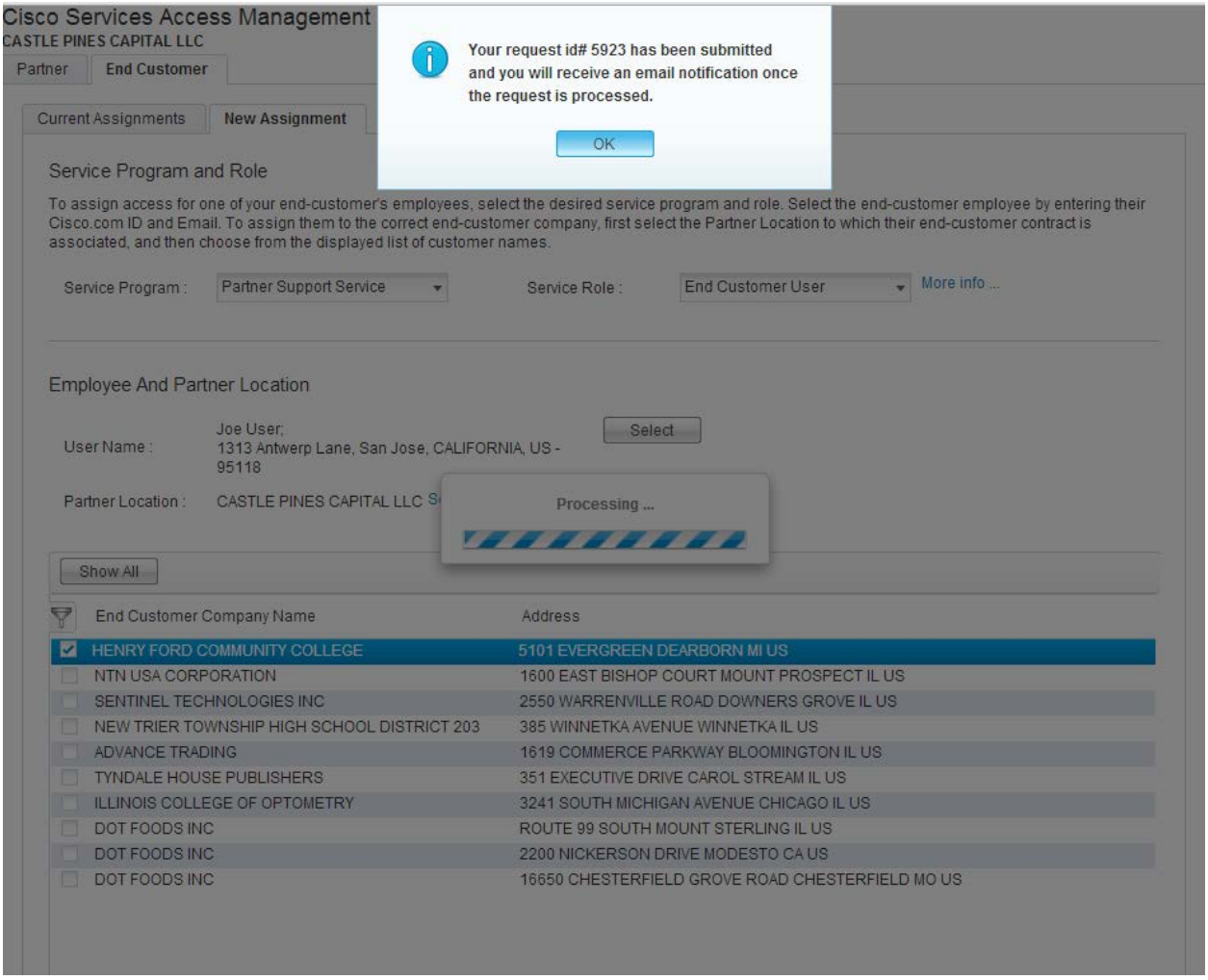


Click the “Submit” button to display all End Customer companies for the selected Partner location, or use the optional “Filter” button to narrow the search results based on End Customer company name and location. Note that any company filter search must include the country, and can optionally include customer name, state, city or street address.

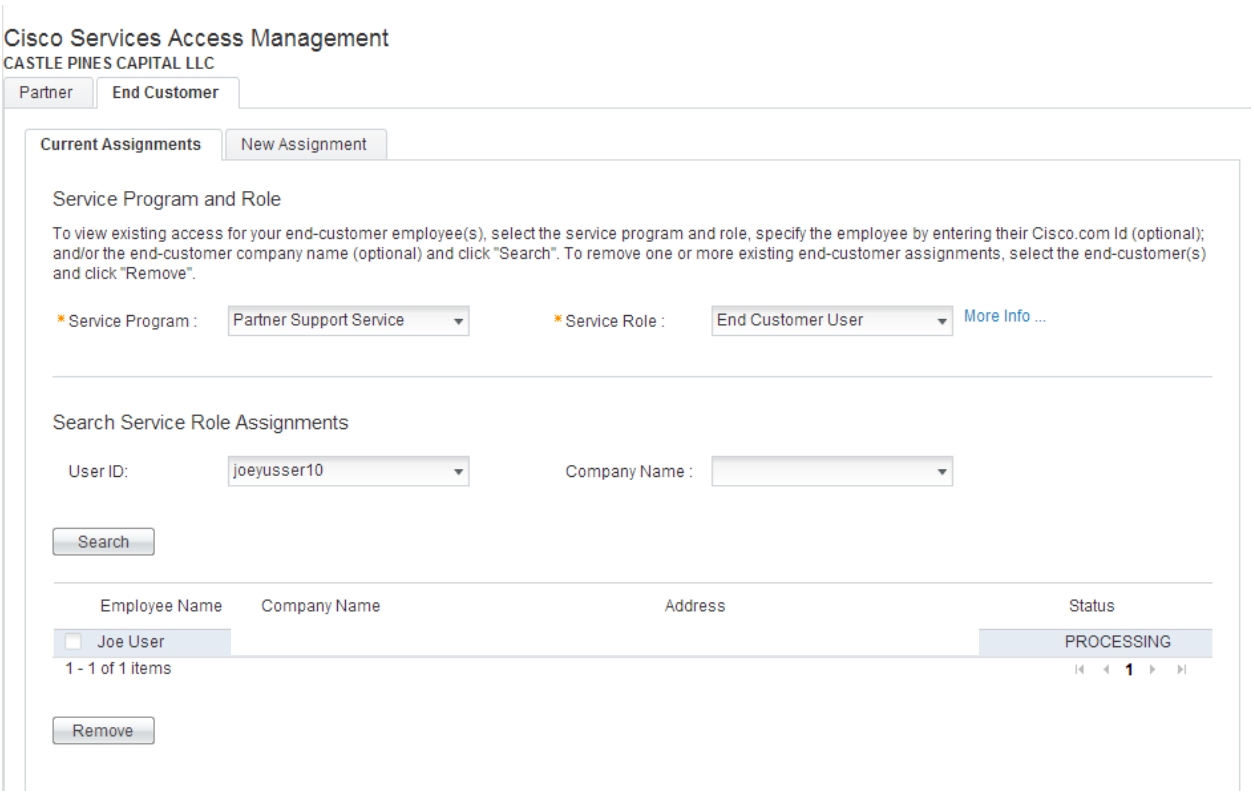


Select the user's end customer company, and click "Submit". In the confirmation pop-up, click "OK" to initiate the back end process request. A pop-up message with the Request Id# will be displayed.


Employee And Partner Location
User Name :
Joe User;
1313 Antwerp Lane, San Jose, CALIFORNIA, US - 95118
Select
Partner Location :
CASTLE PINES CAPITAL LLC
Select Partner Locations...
Show All
End Customer Company Name
Address
HENRY FORD COMMUNITY COLLEGE
5101 EVERGREEN DEARBORN MI US
NTN USA CORPORATION
1600 EAST BISHOP COURT MOUNT PROSPECT IL US
SENTINEL TECHNOLOGIES INC
2550 WARRENVILLE ROAD DOWNERS GROVE IL US
Assign joeyusser10 as End Customer User for the following customers?
Company Name
Address
HENRY FORD COMMUNITY COLLEGE
5101 EVERGREEN DEARBORN MI US
OK
Cancel
1 - 10 of 602 items
1 2 3 4 5 6 7
Submit

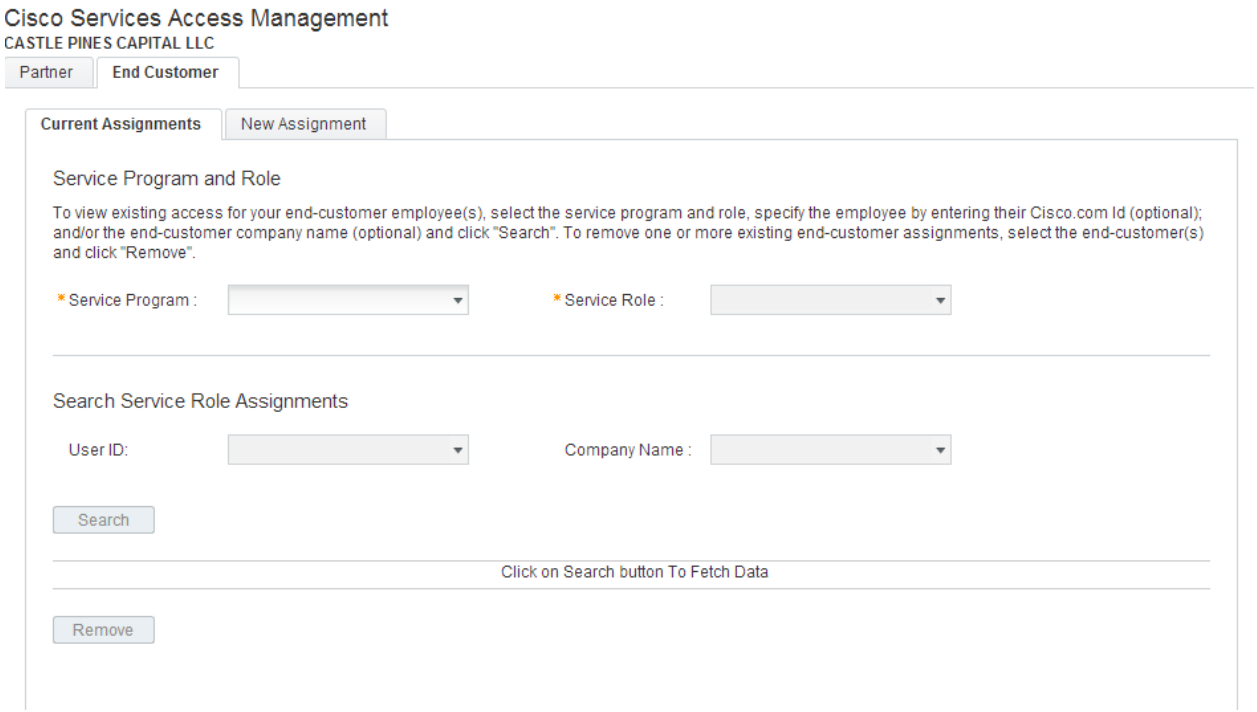


Click “OK”. A search will be automatically initiated based on the same parameters selected before the assignment. The customer assignments that have been submitted for assignment will no longer be listed in the New Assignment Tab search results and instead should now appear in the End-Customer-Current tab. If the processing is not completed, the status is displayed as “Processing”, and after completion of processing, status is updated to “Active”.


Cisco Services Access Management
CASTLE PINES CAPITAL LLC
Partner
End Customer
Current Assignments
New Assignment
Service Program and Role
To view existing access for your end-customer employee(s), select the service program and role, specify the employee by entering their Cisco.com Id (optional); and/or the end-customer company name (optional) and click "Search". To remove one or more existing end-customer assignments, select the end-customer(s) and click "Remove".
* Service Program :
Partner Support Service
* Service Role :
End Customer User
More Info ...
Search Service Role Assignments
User ID:
joeyusser10
Company Name :
Search
Employee Name
Company Name
Address
Status
Joe User
PROCESSING
1 - 1 of 1 items
1
Remove

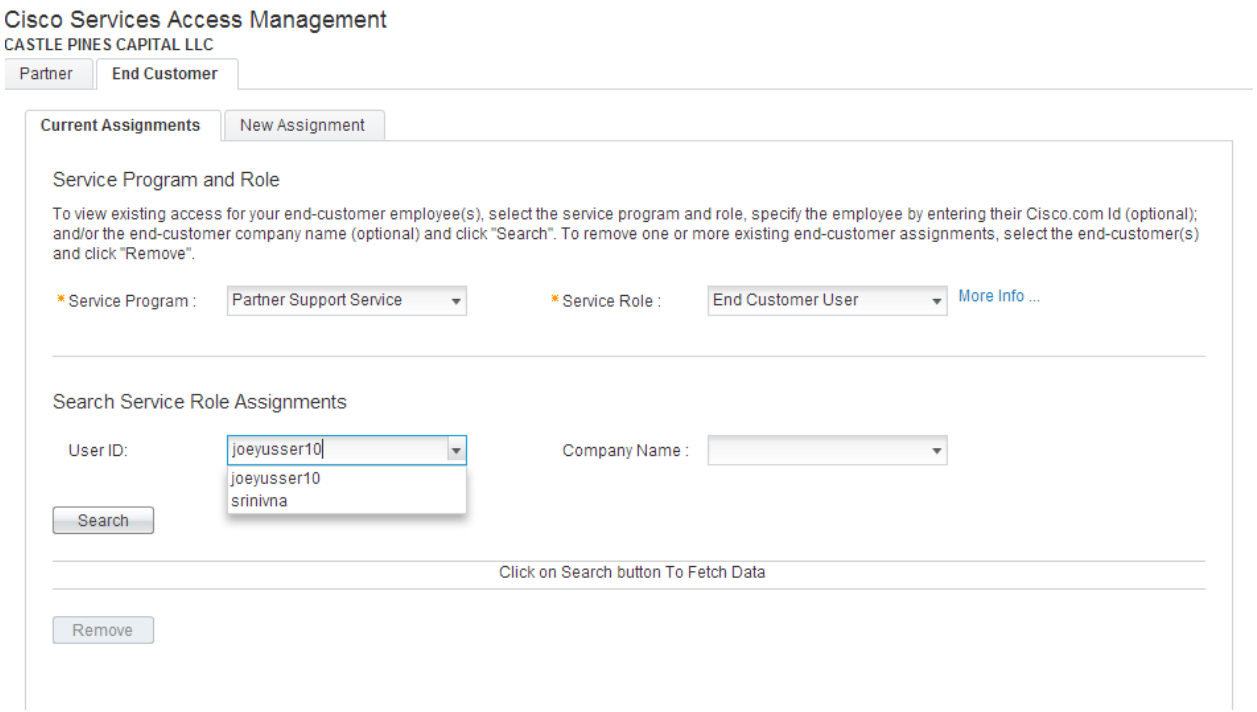
End-Customer – Current Tab

As a Partner Administrator, use the End-Customer–Current tab to view or remove existing Customer role assignments to your End-Customer companies.

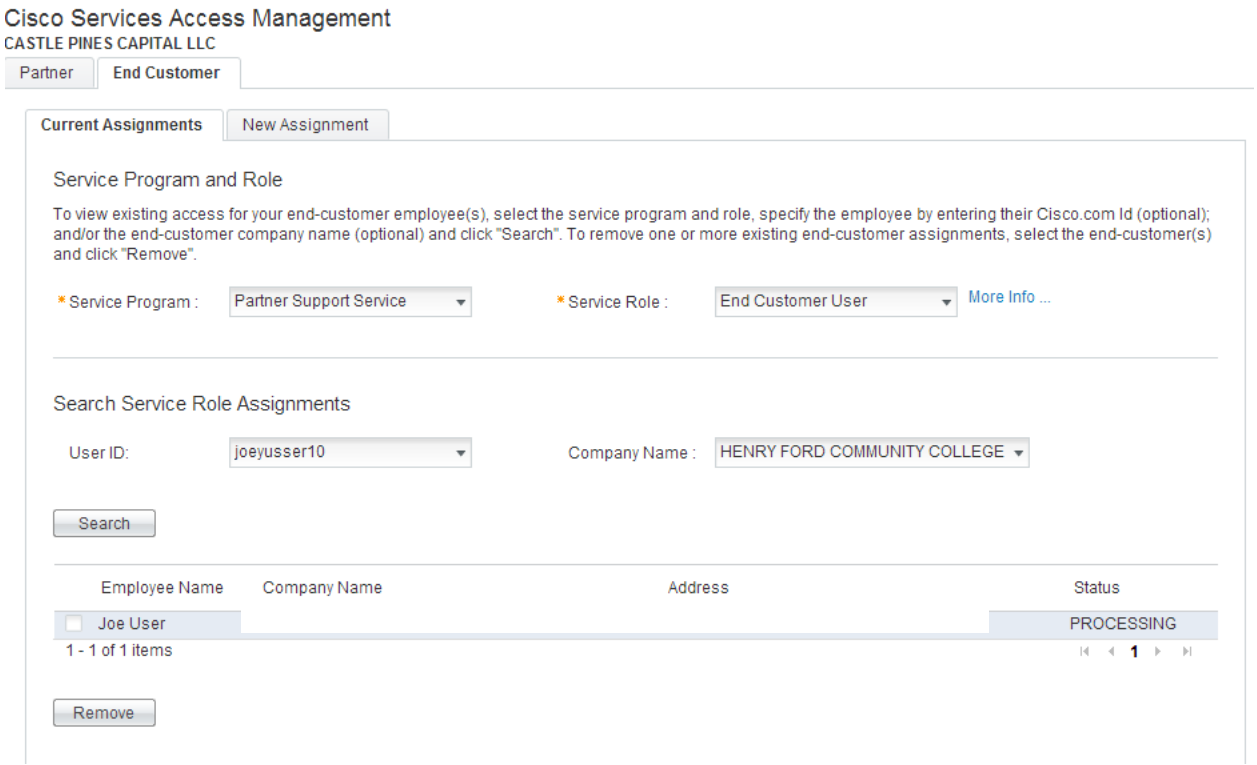


Select the Service Program and Service Role from the drop-down list values. Click on the “more info” link to display the description of the Service Role selected.

You may choose to search either by User ID or by End Customer Name. By typing in either field, the system will display an auto-suggest of the matching Cisco.com IDs or End Customer Company Names for which customer user role assignments have previously been made.



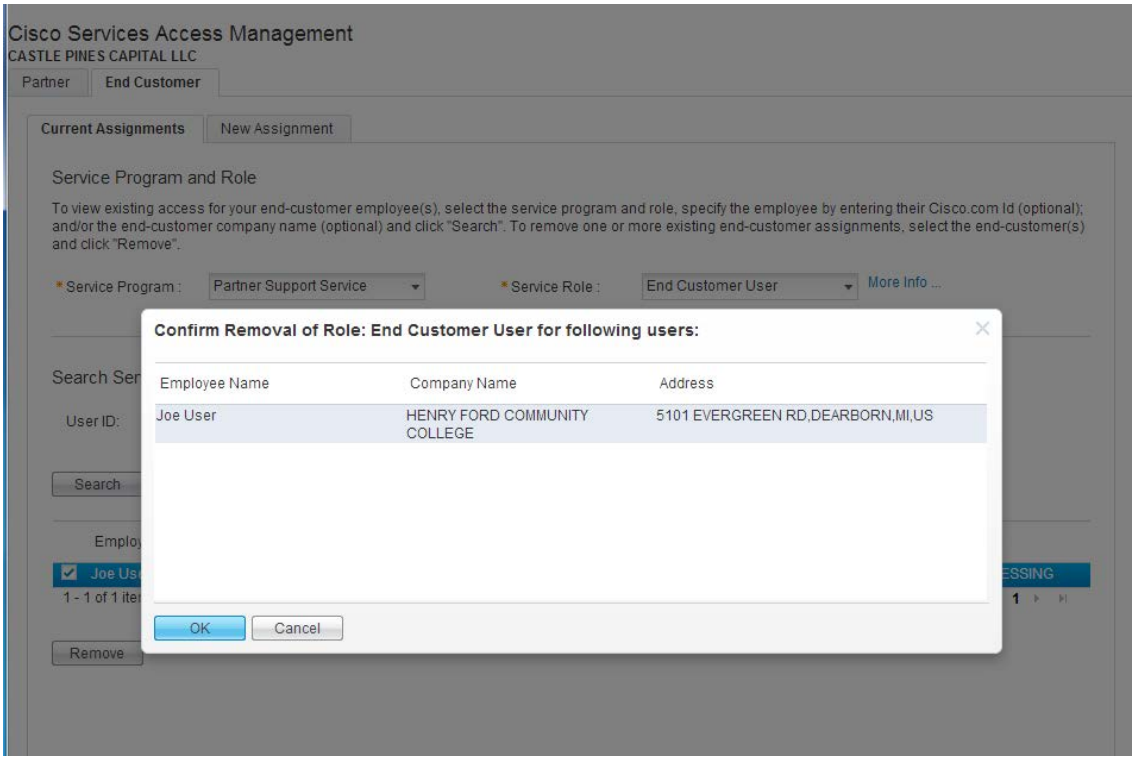
After selecting the User ID or Company Name, click the search button.



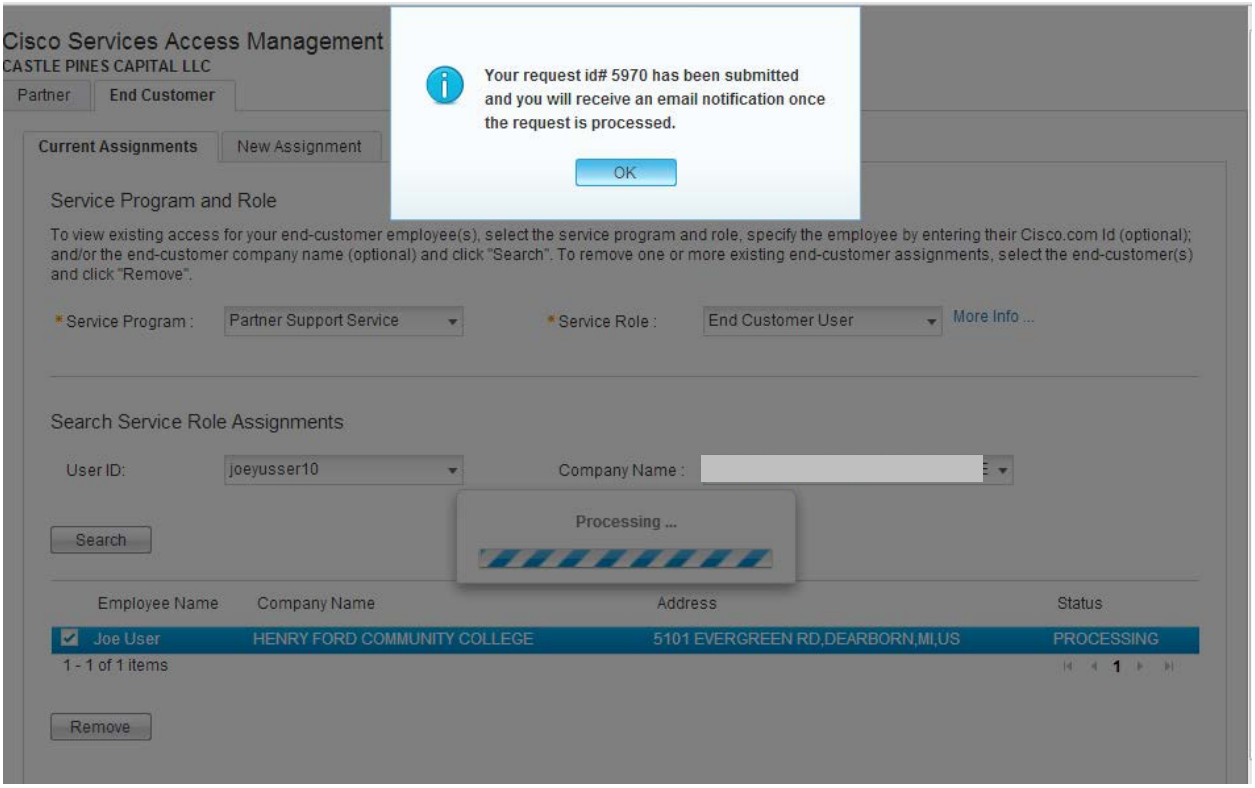
Remove Customer Role Assignments for an End-Customer User

To remove an End Customer role assignment, select the record displayed in the search results, and click “Submit”.

A confirmation Pop-up is displayed. Click “OK” to delete the End Customer user role assignment, or click “Cancel”.



A pop-up message with the Request Id# will be displayed, as illustrated below.



Click “OK” to submit the request. A confirmation email with the request # will be sent when the role removal process is complete.

Appendix D: Function-based and Menu-based Quick Reference

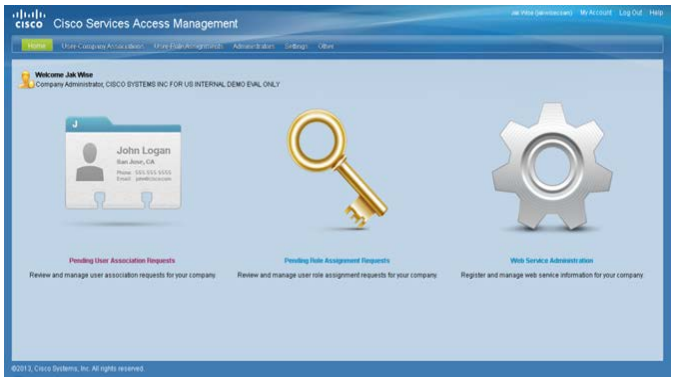
Welcome to Cisco Services Access Management

The instructional online help content referenced herein is organized both by function (or task), and on-screen menu option, for the most common Delegated Administrator actions.

Navigate By Function

Quick References

Getting Started
Onboarding a User
Managing User Requests
Batch Upload
Edit User Access
Remove User Access
Help Desk Support
FAQs



Navigate By Menus

User Guide

Home
- Table of Contents
- Cisco Services Access Management Overview
- Introduction to Delegated Administration

User-Company Associations
- Pending User Association Requests
- Revalidate User Association Requests
- View Existing Associations
- Associate User to My Company
- Change a User's Company-Association
- Batch Upload

User-Role Assignments
- Pending Role Assignment Requests
- Assign Roles to Users
- Change a User's Role Assignments
- Change External User's Role Assignments
- Batch Upload

Administrators
- Nominate an Administrator
- View Existing Administrators
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Settings
- Change Company Association Rules
- Change Notification Preferences

Other
- User Assignment to End Customer Company
- Web Services
- Enable Cisco Services programs for your Company

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[FAQs](#)

Cisco Services Access Management User Guide

Getting Started

Cisco Services Access Management provides for "party-centric" role-based access to new Cisco Smart Services. Rather than requiring a contract administrator to explicitly add a user to each and every contract in order to receive technical support, party-centric access allows for a company Delegated Administrator (DA) to associate users to their customer or partner "party" (a hierarchical level within your company / organization) and assign them to one or more user roles in order to grant access to the support services to which the company is authorized.

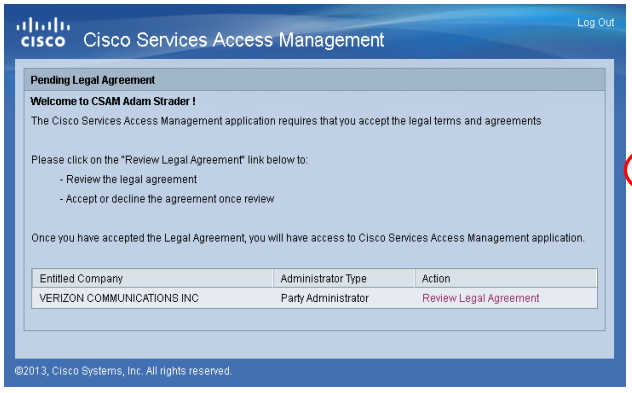
Quick References highlight the most common DA actions, and provide links back to the detailed step-by-step instructions in the online user guide.

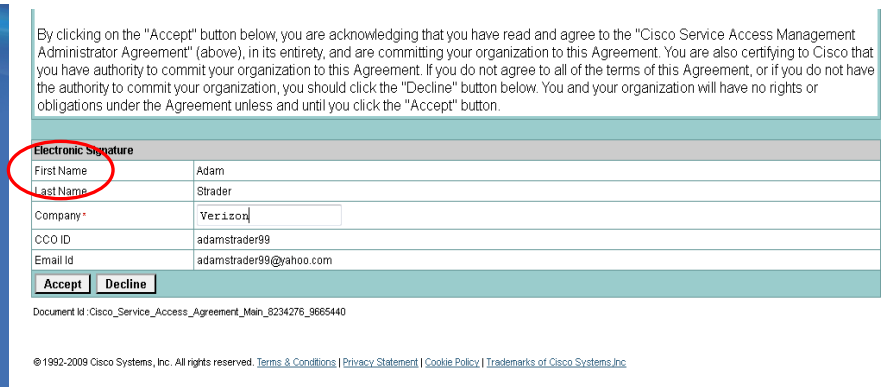
This Quick Reference describes the first steps a new company Delegated Administrator should take to get started.

- **Accept Your DA Nomination During First Login**
- **Establish Your Company and Administrator Settings**
- **Nominate a Backup Delegated Administrator**
- **Assign Access Roles to Yourself**

Accept Your Delegated Administrator Nomination During First Login

As a nominated DA, you received email notification that your Cisco account has been associated to your company, and that you have been nominated to become the Delegated Administrator for your company. Using a link in that email, the first time you log in to Cisco Services Access Management, you must view and then accept the terms & conditions. If you want to pass this responsibility on to someone else in your organization, you must first accept, and then nominate the other person.





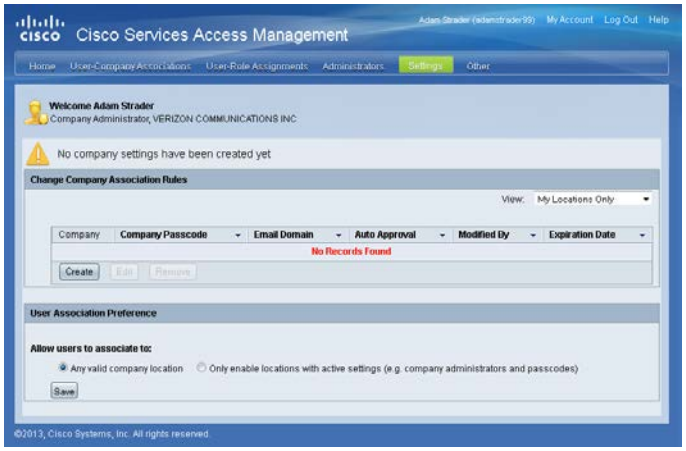
Establish Your Company and Administrator Settings

As the Delegated Administrator, you can define rules that will enable additional users to request association to your company, and how you will be notified to take action. If you prefer to manually perform all user associations yourself, you can skip this step. You can always return to this step, if you want to enable user self-association requests at a later time.

Company Association Rules

From the top "Settings" menu, select "Change Company Association Rules". Initially, there will be no records of any association rules setup for your company. Click the "Create" button to establish new rules for your company party, to allow users to request association based upon:

- Email domain matching
- Shared Company passcode
- Company name and address search



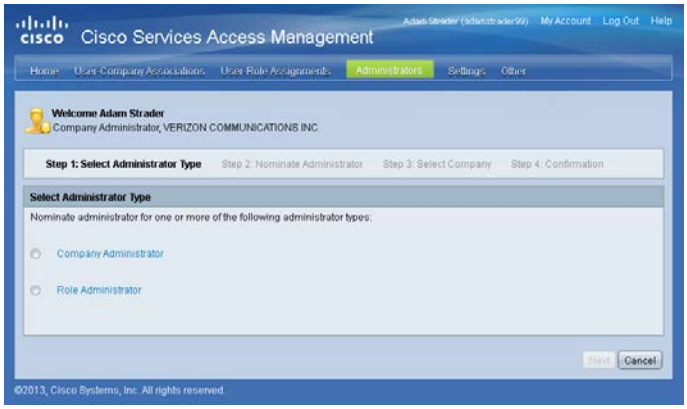
Through the establishment of the Company Settings, the Delegated Administrator can individually allow or not allow, or combine these options, in order to flexibly control the user self-association process.

Administrator Notification Preferences

Each Delegated Administrator can customize how and when they are notified of pending user self-association and role assignment requests. Use the top menus to navigate to "Settings," select "Change Notification Preferences," and specify whether to receive separate notifications for each request, or a summarized "daily digest."

Nominate a Backup Delegated Administrator

You should nominate at least one additional person at your company to have Delegated Administrator privileges. Depending on the size of your company and the number of users, you may choose to centralize all users and administrators together, or create smaller decentralized groups, according to your company's desired policy or needs.



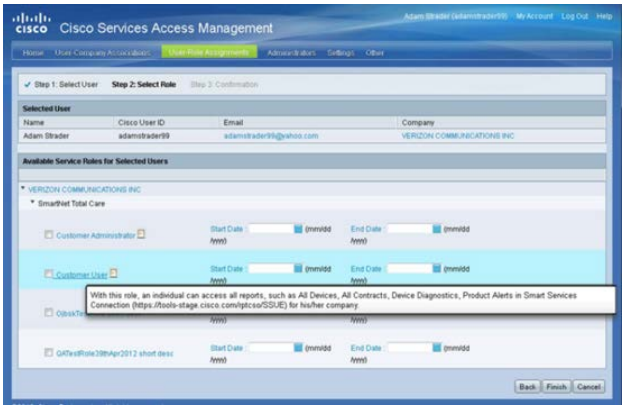
To nominate an additional administrator, from the "Administrators" menu, select "Nominate an Administrator." Select Company Administrator, enter the user's CCO ID or email address, and select the company location.

The nominated user will receive an email with a link to log in and accept the Delegated Administrator terms and conditions.

Assign Access Roles to Yourself

The Delegated Administrator role only gives you access to associate users to your company and assign service access roles to users. For you to have access to specific Cisco Business Services, you must assign one or more roles to yourself.

If you need access to functionality for multiple Business Services, you will need to assign a separate role for each Business Service.



For instructions on assigning roles, see the "see Onboarding a User" quick reference

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Onboarding a User

Associate Users to your Company and Assign User Roles

Onboarding a user involves two steps:

- Associate the user to the Company
- Assign one or more roles to the user, for each of the services to which the company is authorized.

This quick reference describes the process of a Delegated Administrator performing all of the onboarding steps. For a summary of the user self-service process, see the "Managing User Requests" quick reference.

Note: In order for a user to be associated, he or she must first register for a Cisco account. You must know either their Cisco login ID or the email address they used when registering.

Associating a User to Your Company

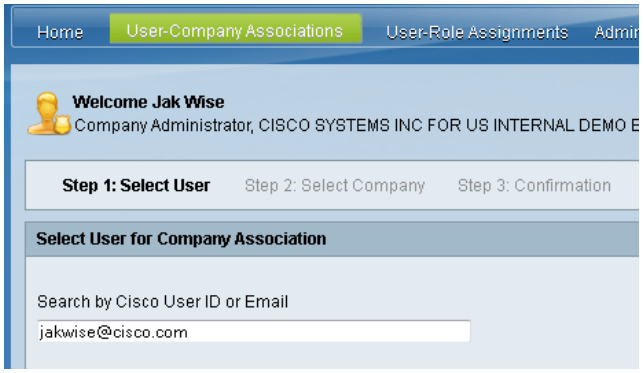
To associate a single user to your company, use the top menus to navigate to "User-Company Association" and select "Associate User to My Company."

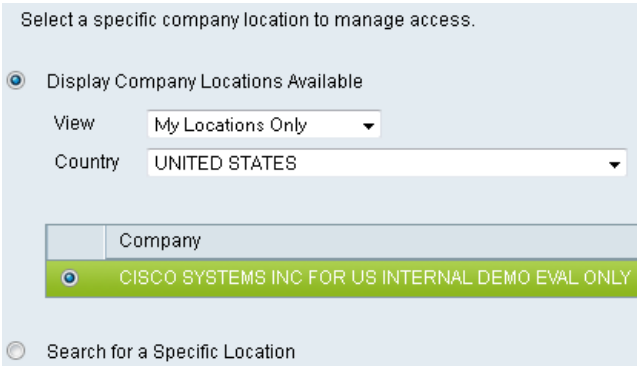
Step 1: Select User - Enter the CCO ID or email address of the user that you want to associate to your company, and click "Next."

Step 2: Select Company - Select the company location from the list of existing locations, or search for a specific location, and click "Next."

Step 3: Confirmation - Verify the details of the selection and click "Finish". The user will automatically receive an email confirmation that their Cisco User ID has been associated to your company.

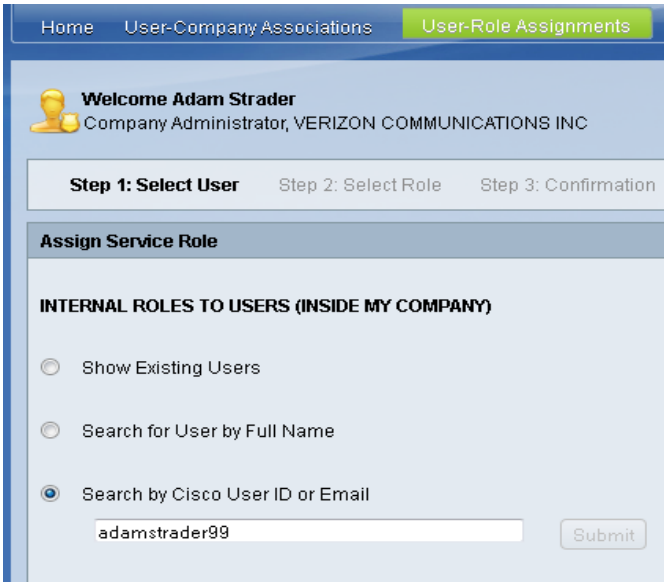
If you want to immediately assign access roles to this newly-associated user, answer "Yes" to the pop-up.





Assigning User Roles

To associate a single user to your company, use the top menu to navigate to “User-Role Assignment” select “Assign Roles to Users.”



Step 1: Select User

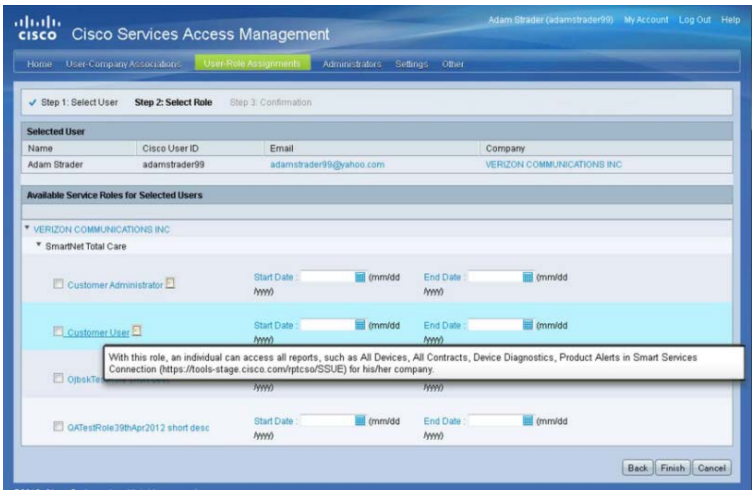
Choose an option to:

- Display a list of all existing associated users;
- Search for a user by name; or
- Search for a user by CCO ID or email address

Click “Next.”

Step 2: Select Role

Each available role is grouped by business service and by the authorized company location. Click on the ▶ next to the Company Name to display the list of business services. Click on the ▶ next to each business service to display the list of available user roles. Hover your mouse over a role to display a more detailed description of the role and its capabilities.



Use the checkboxes to select one or more roles to be assigned to the selected user. If you want the role to not take effect until a future date, or if you want the role assignment to automatically be inactivated on a future date, enter the date in the corresponding field.

Step 3: Confirmation – Click the “Finish” button to complete the role assignment. The user will automatically receive an email notification, informing them that their Cisco ID has been granted the requested role for your company.

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Managing User Requests

User Party Self-Association and Request for Role Assignment

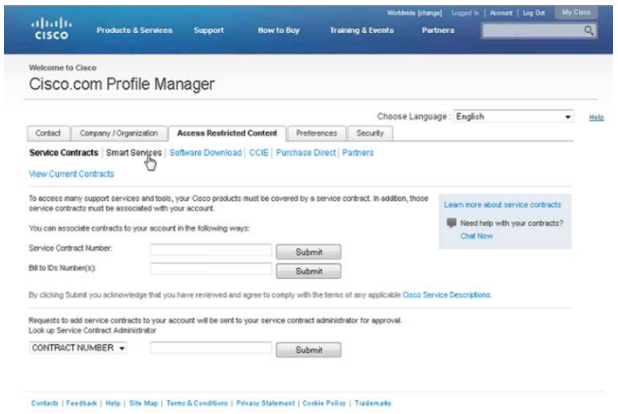
A user who has registered for a Cisco account can submit a request for company association or request for role assignment via Cisco.com Profile Manager. Requests are directed to the company Delegated Administrator, who approves or denies the requests using Cisco Services Access Management.

Step 1: User Submits Request

Step 2: Delegated Administrator Approves/ Denies

User Submits Request via Cisco.com Profile Manager

On the top banner of each cisco.com page, click the "Account" link to access Profile Manager.



To **request company association**, click on the "Company/ Organization" tab and then "Associate your account with your company." Click on "Request Company Association." Enter your company passcode or company address and click "Submit."

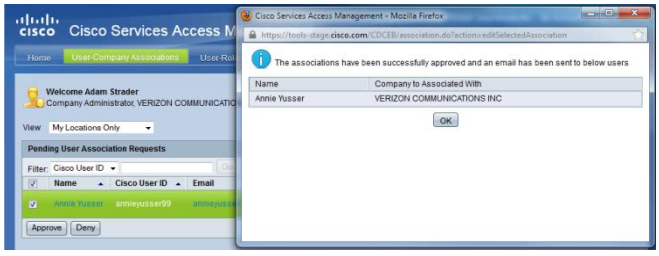
Once their association has been approved, the user can **request role assignment** by navigating to the "Access Restricted Content" tab and clicking on "Smart Services." Use the check boxes to select one or more of your company's Available Roles and click "Submit"

Managing User Requests for Company Association

Manual approval/denial is required if the company settings were set to "Manual Approval Required" (see "Getting Started"). Use the top menus to navigate to "User-Company Associations" and select "Pending User Association Requests" to display a list of all pending requests. Select one or more records and click on "Approve" or "Deny". Company association settings can be set to automatically approve user self-association requests to all locations of the company based on pre-determined email domain and/or company name matching rules (see "Getting Started"). In that case, you will be notified and must manually inactivate any undesired self-associations (see "Remove User Access").

Managing User Requests for Role Assignment

Use the top menus to navigate to "User-Role Assignment" and select "Pending User-Role Assignment" to display list of pending requests. Select one or more records, enter start and/or end dates (optional), then click on "Approve" or "Deny."



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Batch Upload

Association, Assignment & Nomination

Instead of performing User-to-Company associations individually, you can associate multiple users through a batch upload, using a provided spreadsheet template. This feature may be especially useful to on-board or migrate users from another system or user repository.

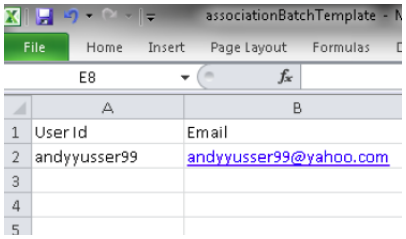
Similarly, instead of performing User-to-Role assignment individually, you can associate multiple users to multiple roles through a batch upload, or nominate multiple users to become additional Delegated Administrators for your company, using provided spreadsheet templates.

Users will be notified via email of the results of the batch upload. Please note: Once submitted, it may take up to 15 minutes for the batch upload to process.

Performing User-to-Company Association via Batch Upload

Use the top menus to navigate to "User-Company Associations" and select "Batch Upload". Select the company location to which you want the list of users to be associated. You will need to initially download the template for batch upload. Save this file as "**associationBatchTemplate.csv**". Edit the file to add the User IDs and email addresses of the users to be associated to your company, and save the file. Click "Browse" to locate and upload the saved file, and then click on "Submit".

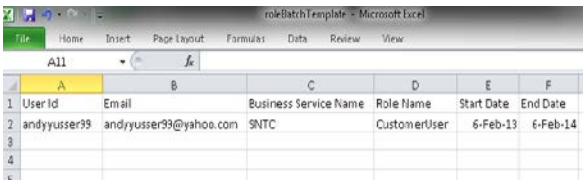
Data Format for Template:



Performing User-to-Role Assignment via Batch Upload

Use the top menus to navigate to "User-Role Assignments" and select "Batch Upload". You will need to initially download the template for batch upload. Save this file as "**roleBatchTemplate.csv**". Edit the file to add the users' role assignments, and save the file. Click "Browse" to locate and upload the saved file, and then click on "Submit".

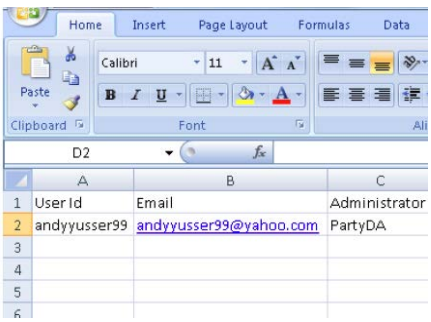
Data Format for Template:



Nominating Multiple Additional Delegated Administrators via Batch Upload

Use the top menus to navigate to "Administrators" and select "Batch Upload". Select the company location for which you want the list of users to be nominated to administer. You will need to initially download the template for batch upload. Save this file as "**adminBatchTemplate.csv**". Edit the file to add the User IDs, email addresses, and administrator types of the users that you want to nominate as Delegated Administrators and save the file. Click "Browse" to locate and upload the saved file, and then click on "Submit".

Data Format for Template:



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Edit User Access

Changing an Existing User's Company Association and/or Role Assignments

If your company has established decentralized, location-based administration, you can change an existing user's company association to reflect a physical move within the company. If the user has left your company, you should "Remove User Access" instead.

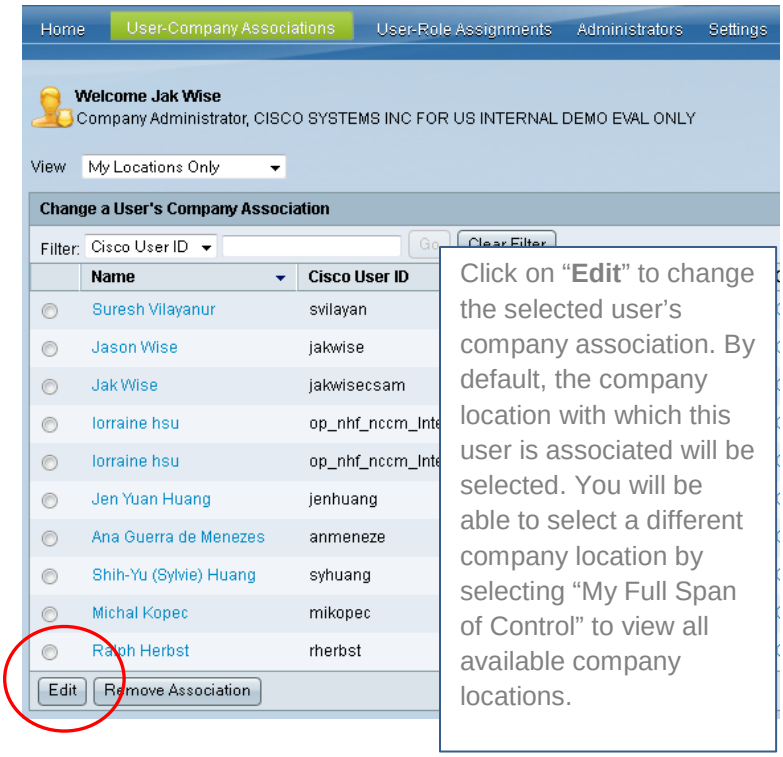
A Delegated Administrator can also change an existing user's role assignments, either to reflect a change in their job responsibilities or to grant access to new services.

The user will receive email notification of the changes made to their account.

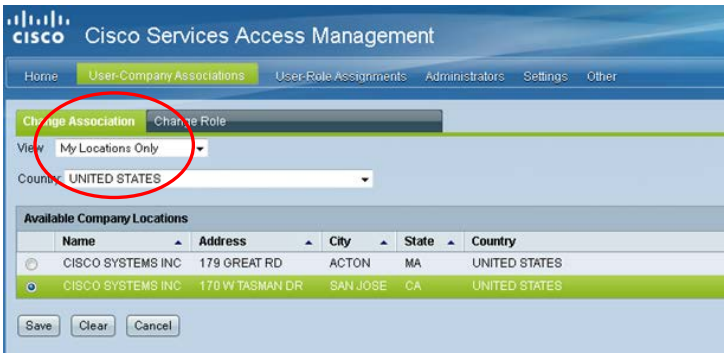
All Delegated Administrators for your company will also be notified (based on their notification preferences) of the changes made.

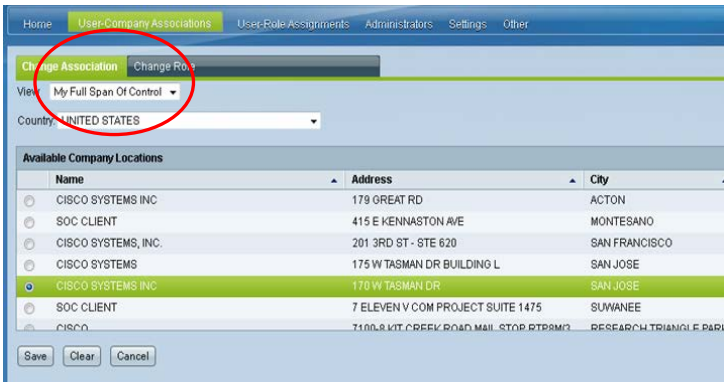
Changing a User's Company Association

Use the top menus to go to "User-Company Associations" and select "Change a User's Company Association". Select the user and click on "Edit." In the next screen, change the View option to "My Full Span of Control" to list all available locations. Select the user's new location, and click "Save."



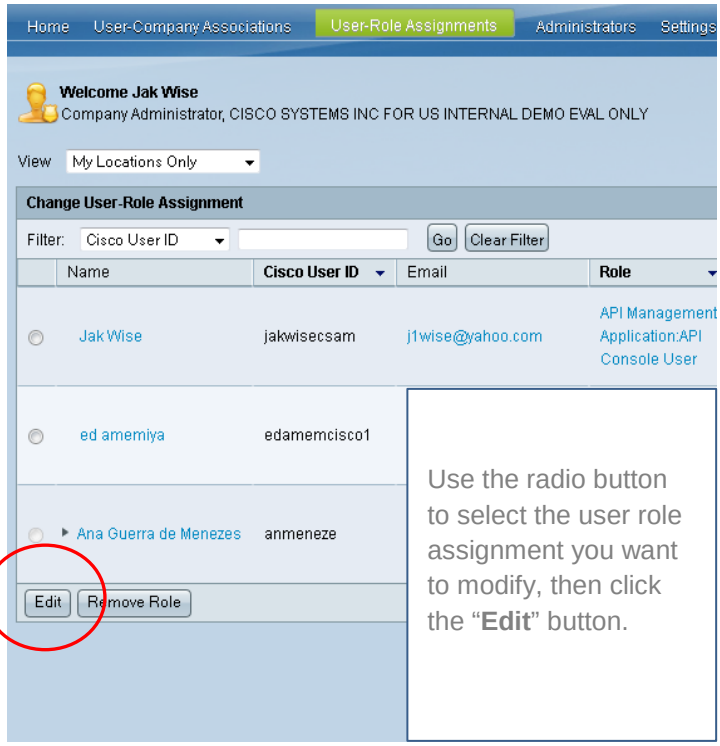
Click on "**Edit**" to change the selected user's company association. By default, the company location with which this user is associated will be selected. You will be able to select a different company location by selecting "My Full Span of Control" to view all available company locations.



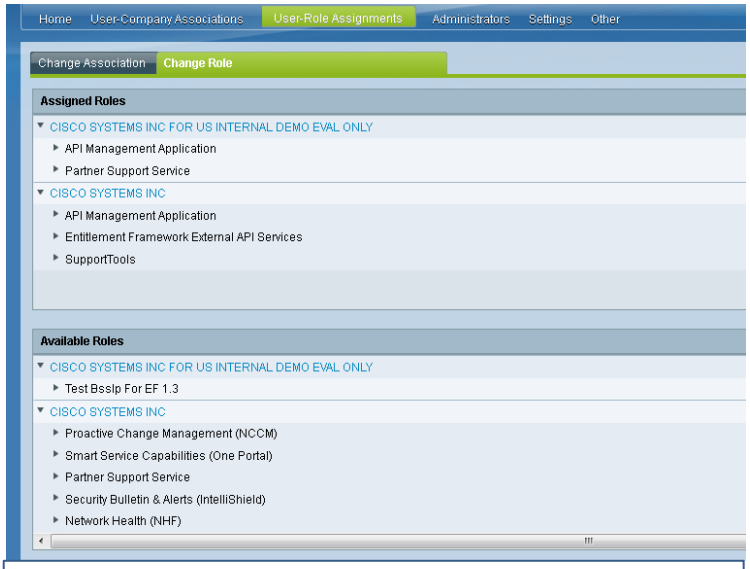


Changing a User's Role Assignments

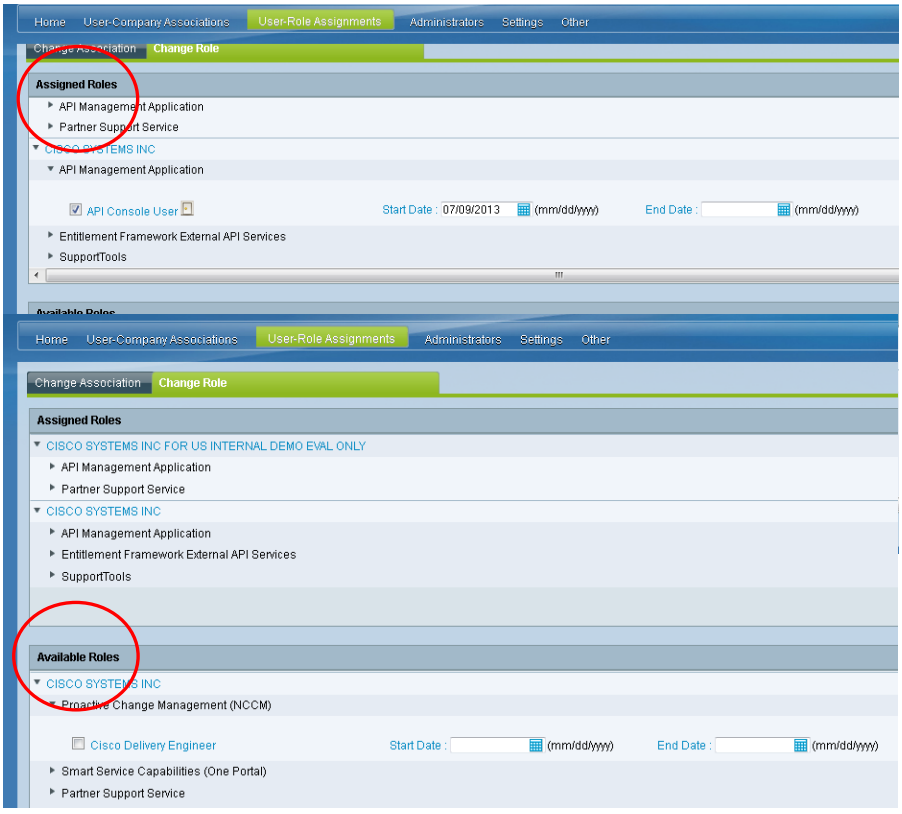
Use the top menus to navigate to "User-Role Assignments" and select "Change a User's Role Assignments". Click the ▶ next to the user's name to expand their list of existing user role assignments. To remove a single user role assignment, use the radio button to select the role and click "Remove Role". To assign an additional role or change an existing assignment for a specific user, select any of the user's existing roles and click "Edit".



Use the radio button to select the user role assignment you want to modify, then click the "**Edit**" button.



On the subsequent screen, click the ▶ to expand the categorized lists, of the selected user's current Assigned Roles and additional Available Roles.



To change the start or end date of a user's current Assigned Role, enter the new date value in the corresponding field. If the Start Date is left blank, the role assignment is immediately active. If the End Date is left blank, the role assignment will remain active until the role is manually removed (or until your organization is no longer entitled to the corresponding service).

To assign one or more of the Available Roles to the user, check the box next to the role, and (optionally) enter the start/end dates.

Click "Save."

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Remove User Access

Disassociate a User from your Company or Inactivate Role Assignments

You can disassociate an existing user who has left your company and no longer requires access to any Cisco Services on behalf of your company.

You can remove a user's individual role assignments, to reflect a change in their job responsibilities.

The user will receive email notification of the changes made to their account.

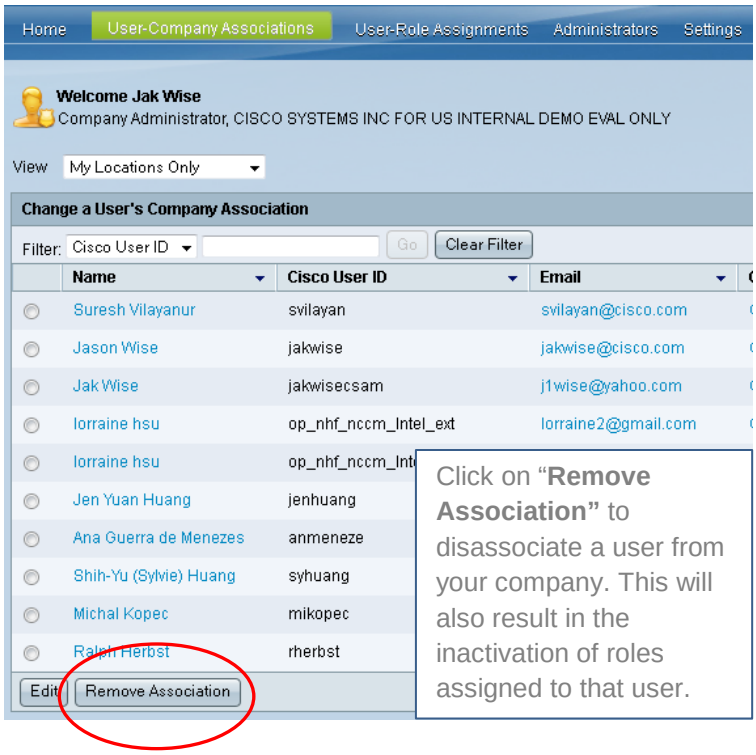
All Delegated Administrators for your company will also be notified (based on their notification preferences) of the changes made.

Removing User-to-Company Associations

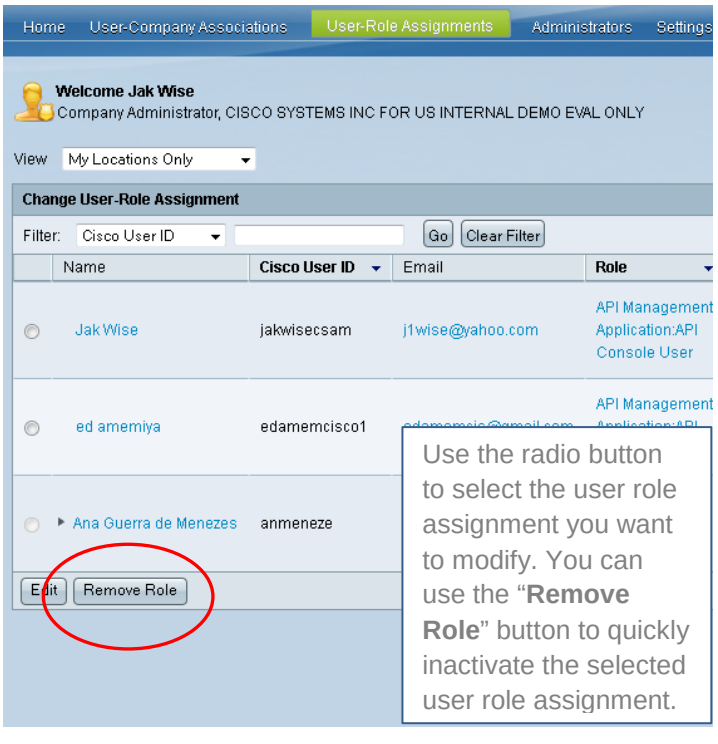
Use the top menus to go to "User-Company Associations" and select "Change a User's Company Association". Select the user by clicking on the radio button and click on "Remove Association". Removing the user's association to your company will automatically inactivate all role assignments they received from your company.

Removing User-to-Role Assignments

Use the top menus to navigate to "User-Role Assignments" and select "Change a User's Role Assignments". Click the ▶ next to the user's name to expand their list of existing role assignments. Select the role to be removed and click "Remove Role".



Click on "**Remove Association**" to disassociate a user from your company. This will also result in the inactivation of roles assigned to that user.



Use the radio button to select the user role assignment you want to modify. You can use the "**Remove Role**" button to quickly inactivate the selected user role assignment.

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Help Desk Support

Who shall I contact if I require additional help?

Issue Categories:

- **Refer to FAQs**
- **Request Access to Cisco Service Access Management**
- **Request Access to Cisco.com Profile Manager**
- **Report CSAM Application Down**
- **Request Technical Support for DA Task Completion**
- **Request Technical Support for Profile Manager**

This is an externally-facing document so the production support described herein is with respect to case origination.

Request Access to Cisco Service Access Management

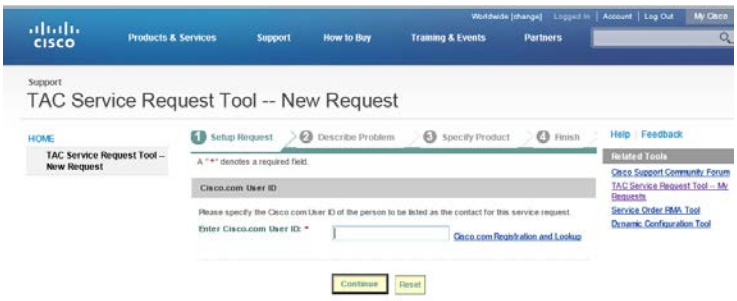
Access to the CSAM application will be granted concurrent with Delegated Administrator nomination. The CSAM application is to be utilized by Delegated Administrators and is not intended for use by end users.

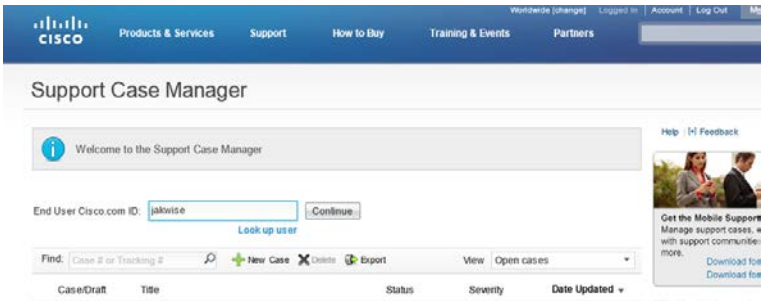
Request Access to Cisco.com Profile Manager

Access to the Cisco.com Profile Manager is available to any user with a Cisco.com (CCO) ID. If you do not have a CCO ID please register with Cisco.com here.

Report CSAM Application Down

Please contact the Technical Assistance Center (TAC) via phone/ email or log into and create a service request with the Technical Assistance Center Service Request Tool (TSRT), soon to-be Support Case Manager (SCM)





Request Technical Support for DA Task Completion

A Cisco Internal User will request support on your behalf. Please contact your Engagement Manager or Advanced Services Delivery equivalent and request that an Entitlement Supporting Services Remedy ticket be opened.

Request Technical Support for Cisco.com Profile Manger

Please click on the Profile Manager Help link provided in the upper right-hand corner of the application. You will be routed to the Cisco Technical Assistance Center (TAC) and asked to identify yourself and your issue here.

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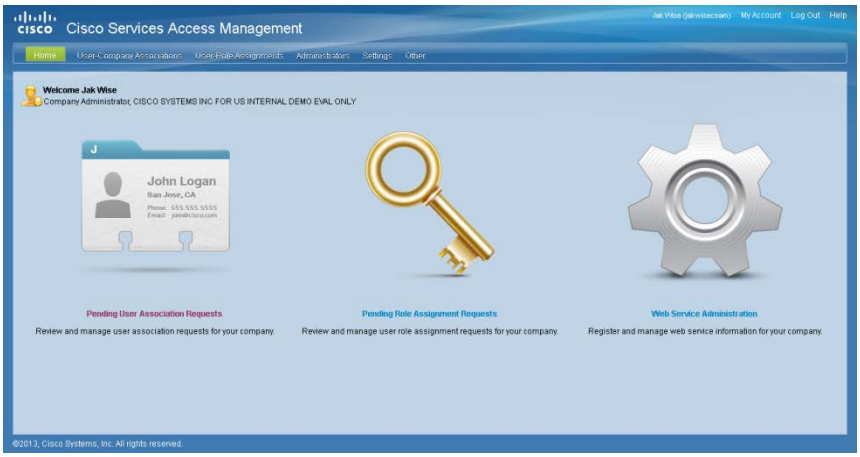
Frequently Asked Questions

Navigating the Cisco Service Access Management Function



Frequently Asked Questions:

- Who will use Cisco Services Access Management?
- Who, at my company, can get nominated as a Delegated Administrator?
- As the first Delegated Administrator for a large company, how can I most efficiently manage access for users that are geographically dispersed?
- My company has a lot of users. Do I have to add each one manually?
- An associated user has left my company. What should I do?
- I have nominated additional Delegated Administrators who will manage their company organization user-company associations and user-role assignments. What do I need to do to ensure that I am not the first person contacted for user access requests?
- How can I see who has associated a user or nominated the additional company administrator?
- A user is having difficulty in requesting association to my company through Profile Manager. What might the problem be, and how can I solve it myself?
- A user does not see the link in Profile Manager to request for additional access to Cisco Services delivered by Cisco to my company. What could be the issue?
- As the Delegated Administrator, I had asked users to request for a specific role using Profile Manager. But they cannot see this particular role in the list displayed there. Why is this happening?
- I get an error while using the “batch upload” feature in Cisco Services Access Management. What could be the issue?