



Cisco Software: Virtual Account Custom Tagging

Quick Guide for Partners & Customers

Note: Screens in the presentation may vary slightly from the actual tools

Cisco Software Central (CSC)

Manage Smart Accounts

- 1 To add and manage Custom tags, login to Cisco Software Central (software.cisco.com), go to the Administration section and click on Manage Smart Account.

The screenshot displays the Cisco Software Central web interface. At the top, there is a search bar, a user profile icon labeled 'AS', and a language selector set to 'US EN'. The main navigation menu on the left includes 'Cisco Software Central', 'Products & Services', 'Support & Download', 'Training & Event', 'Buy', and 'Partners'. A secondary menu on the right lists 'Software Home', 'Orders & Delivery', 'Download & Upgrades', 'Provisioning', 'License', and 'Administration'. The 'Administration' menu item is highlighted with a red box. A red arrow points from this box to a 'Manage Smart Account' option in the main content area, which is also highlighted with a red box and a red circle containing the number '1'. The 'Manage Smart Account' option is described as: 'Modify the properties of your Smart Accounts and associate individual Cisco Accounts with Smart Accounts'. Other visible options include 'Request a Smart Account', 'Request Access to an Existing Smart Account', and 'Learn about Smart Accounts'.

Manage Smart Account – Custom Tags

Virtual Account Custom Tagging

You can now create **Custom Tags** at the **Virtual Account level** (e.g. Department, Platform Technology, Country etc.) and list values for each of them. This will help you effectively organize and manage Virtual Accounts (VAs) based on the organizational structure and entitlement policies of your company.

- 1 Go to the **Custom Tags** tab.
- 2 Click the **New Virtual Account Custom Tag** button.

Only Smart Account Administrators can create new Custom Tags for Virtual Accounts.

Cisco Software Central

Manage Smart Accounts

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

Virtual Account Custom Tags

New Virtual Account Custom Tag

Search by Tag Name

Virtual Account Custom Tag Name	Description	Mandatory?	Actions
America	-	Optional	Delete...
latam	-	Optional	Delete...

Manage Smart Account – Custom Tags

Virtual Account Custom Tagging

- 1 **Step 1: General**, enter the tag details, such as **Tag Name**, **Description**.
- 2 Ensure to categorize the tag as **Mandatory** or **Optional**. *If you select **Mandatory** for the **Country tag**, you will have to provide a value for **Country** for all Virtual Accounts including existing Virtual Accounts as well as new Virtual*
- 3 *Accounts.*
You can also choose if you want the tag to have single value or more than one value for a Virtual Account.
 - o *If 'One Tag value' option is selected, you will be able to assign only one Country for a Virtual Account.*
 - o *If 'Allow Multiple Tag Values' option is selected, you will be able to assign multiple countries to a Virtual Account.*

Click on **Next**.

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

Manage Smart Accounts

[Account Properties](#) | [Virtual Accounts](#) | [Users](#) | **Custom Tags** | [Requests](#) | [Account Agreements](#) ¹ | [Event Log](#)

Virtual Account Custom Tags

Virtual Account Tags provide the ability to create custom tag values that can be assigned to Virtual Accounts. This capability helps to organize Virtual Accounts and assignment of user access to Virtual Accounts.

New Virtual Account Custom Tag

STEP 1 **General** | STEP 2 Add Tag Values | STEP 3 Review and Confirm

1 Enter the Name and other properties for your Virtual Account Custom Tag

* Tag Name

Description:

2 * Required for All Virtual Accounts? Mandatory ⁱ Optional ⁱ

3 * Tag Value Assignment Options One Tag Value Only ⁱ Allow Multiple Tag Values ⁱ

4

Manage Smart Account – Custom Tags

Virtual Account Custom Tagging

- 1 In **Step 2**, add the **Tag Values** based on the Tag you specified in Step 1.
*For example, if you entered **Country** in Step 1, you can define the tag values as different countries (e.g. US, UK, India).*
- 2 Click the **Add Tag Values** button.

Cisco Software Central > Manage Smart Account

Manage Smart Accounts

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

Virtual Account Custom Tags

1

New Virtual Account Custom Tag

STEP 1 ✓ General | STEP 2 Add Tag Values | STEP 3 Review and Confirm

Add one or more tag values.

Once the tag values are added, you can assign an individual tag value to existing Virtual Accounts by selecting the "..."

Alternatively, you can assign multiple tag values to existing Virtual Accounts by selecting "Manage All Tag Values" button.

Any update to Tag Value will update access of all associated User Groups.

* Tag Values: **2** Add Tag Values


Enter tag values comma separated or add values one-by-one

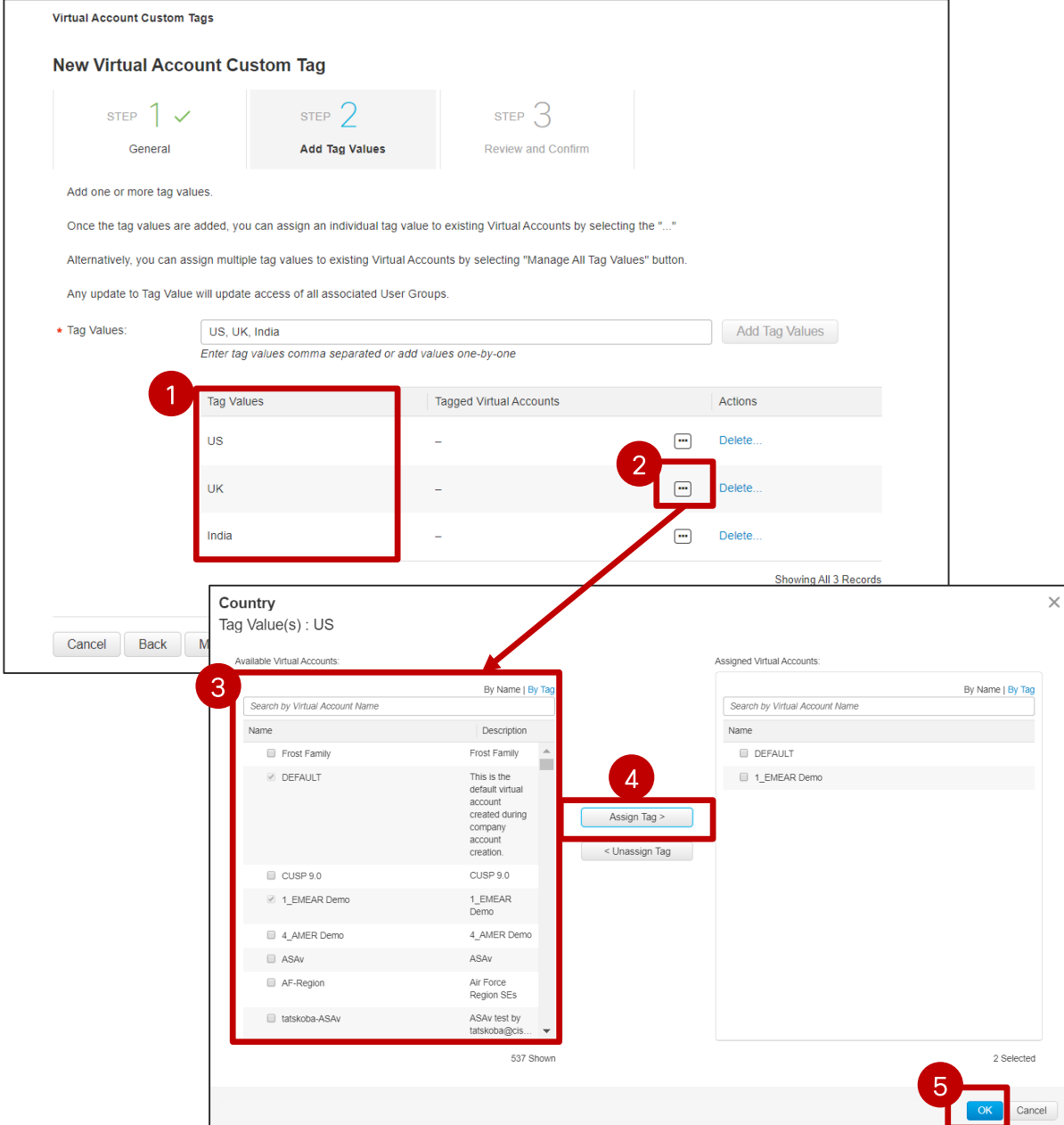
Tag Values	Tagged Virtual Accounts	Actions
No Data Found		

No Records to Display




Manage Smart Account – Custom Tags

Virtual Account Custom Tagging

- 1 The **Tag Values** will appear at the bottom of the page (in **Step 2**).
As a Smart Account Administrator, you can also associate each tag value to your current Virtual Accounts.
- 2 Click on the ellipses  to associate each tag value to your current Virtual Accounts.
- 3 A pop-up appears for the selected tag value. Select the check box next to the desired Virtual Account(s) that need to be associated to the tag value.
- 4 Click on **Assign Tag** to associate the selected Virtual Account(s) to the tag value.
- 5 Click **Ok**



The screenshot shows the 'Virtual Account Custom Tags' configuration page. At the top, there are three steps: STEP 1 (General), STEP 2 (Add Tag Values), and STEP 3 (Review and Confirm). Below the steps, there is a text input field for 'Tag Values' containing 'US, UK, India' and an 'Add Tag Values' button. A table below shows the tag values and their associated virtual accounts:

Tag Values	Tagged Virtual Accounts	Actions
US	-	 Delete...
UK	-	 Delete...
India	-	 Delete...

Callout 1 points to the 'Tag Values' column. Callout 2 points to the ellipsis icon in the 'Actions' column for the 'US' tag value. Below the table, there is a 'Country' pop-up window titled 'Country Tag Value(s) : US'. It has two panes: 'Available Virtual Accounts' and 'Assigned Virtual Accounts'. The 'Available Virtual Accounts' pane contains a list of virtual accounts with checkboxes. The 'Assigned Virtual Accounts' pane is currently empty. Callout 3 points to the 'Available Virtual Accounts' list. Callout 4 points to the 'Assign Tag >' button. Callout 5 points to the 'OK' button at the bottom right of the pop-up window.

Manage Smart Account – Custom Tags

Virtual Account Custom Tagging

Once you click the OK button, you will go back to the **Add Tag Values (Step 2)**.

The grid here displays the **Virtual Account** being tagged.

1 In this example, the Virtual Accounts **DEFAULT** and **1_EMEAR Demo** have **US** as the value for the **Country** tag.

2 Click the **Next** button.

Account Properties | Virtual Accounts | Users | **Custom Tags** | Requests | Account Agreements ¹ | Event Log

Virtual Account Custom Tags

New Virtual Account Custom Tag

STEP 1 ✓ General | **STEP 2 Add Tag Values** | STEP 3 Review and Confirm

Add one or more tag values.

Once the tag values are added, you can assign an individual tag value to existing Virtual Accounts by selecting the "..."

Alternatively, you can assign multiple tag values to existing Virtual Accounts by selecting "Manage All Tag Values" button.

Any update to Tag Value will update access of all associated User Groups.

* Tag Values:

Enter tag values comma separated or add values one-by-one

Tag Values	Tagged Virtual Accounts	Actions
US	DEFAULT, 1_EMEAR Demo	... Delete...
UK	-	... Delete...
India	-	... Delete...

Showing All 3 Records

Manage Smart Account – Custom Tags

Virtual Account Custom Tagging

- 1 In Step 3: Review and Confirm, you can double-check the information.
- 2 Click the Add Virtual Account Custom Tag button.

New Virtual Account Custom Tag

STEP 1 ✓ General STEP 2 ✓ Add Tag Values **STEP 3 Review and Confirm**

Confirm that the information you entered is correct.

Clicking "Add Virtual Account Custom Tag" will create the tag and assign tag values as specified to the Virtual Accounts shown below.

General

Tag Name: Country
Description: –
Required for All Virtual Accounts? Mandatory
Tag Value Assignment Options: One Tag Value Only

Tag Values

Tag Values	Tagged Virtual Accounts
India	–
UK	–
US	DEFAULT, 1_EMEAR Demo

Showing All 3 Records

Cancel Back **Add Virtual Account Custom Tag**

Manage Smart Account – Custom Tags

Virtual Account Custom Tagging

- 1 The landing page of the Custom Tags appears showing the successfully created Virtual Account Custom Tag Country.

The screenshot displays the Cisco Software Central interface for managing smart accounts. The breadcrumb trail is 'Cisco Software Central > Manage Smart Account'. The current page is 'Manage Smart Accounts', with a sub-menu containing 'Account Properties', 'Virtual Accounts', 'Users', 'Custom Tags', 'Requests', 'Account Agreements', and 'Event Log'. The 'Custom Tags' section is active, showing a table of 'Virtual Account Custom Tags'. A red circle with the number '1' highlights the 'Country' tag in the table. A red box highlights the entire table row. A notification banner at the bottom right, also with a red circle and '1', states 'Custom Tag added successfully'.

Cisco Software Central

Cisco

Cisco Software Central > Manage Smart Account

Cisco Demo Customer Smart Account

Manage Smart Accounts

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

Virtual Account Custom Tags

New Virtual Account Custom Tag

Country

Virtual Account Custom Tag Name	Description	Mandatory?	Actions
Country	-	Optional	Delete...

Showing 1 Record

Custom Tag added successfully

