



# Smart Account Roles Overview

Role Based Access Control (RBAC): Roles Mapped to Tools  
Partners & Customers



# Learning Objectives

1

Learn about Smart Account Roles for Customers and for Partners

2

Learn how Smart Account Roles are mapped to Cisco tools

# Smart Account Roles

# Customer Smart Account Roles

CCW Order View management incorporated automatically for applicable Holding Accounts.

Smart Account Approver	● Smart Account Administrator	● Virtual Account Administrator
Can only approve Smart Account legal agreements on behalf of the Account Owner. Includes no User or Administrator privileges.	Manages all aspects of the Smart Account and its Virtual Accounts. The Smart Account Administrator can view and manage license inventory for the entire Smart Account, and also perform Account management activities.	Similar to the Smart Account Administrator, but limited to selected Virtual Accounts. Can perform license management activities and also User management for selected Virtual Accounts.
● Smart Account User	● Virtual Account User	
Similar to a Smart Account Admin, this role allows access to all Virtual Accounts. A Smart Account User can perform licensing activities, but cannot create new Virtual Accounts or perform User management activities.	Similar to a Smart Account User, but is limited to the Virtual Account the User is assigned to – they can perform license management activities, but cannot add new users to their assigned Virtual Account.	

# Customer Smart Account Roles

## Partner and Customer Smart Account Roles

Smart Account Creator is automatically provided the Smart Account Administrator role.

User Roles	Capabilities in CSC	Capabilities in SSM	Capabilities in EA Workspace	Capabilities in LRP
Smart Account Approver	<ul style="list-style-type: none"> <li>Edit/View Account Properties</li> <li>View Users at Smart Account &amp; Virtual Account Level</li> <li>View / Accept Agreements</li> <li>View Event Logs</li> </ul>	<ul style="list-style-type: none"> <li>No access</li> </ul>	<ul style="list-style-type: none"> <li>No access</li> </ul>	<ul style="list-style-type: none"> <li>No access</li> </ul>
Smart Account Administrator	<ul style="list-style-type: none"> <li>Edit / View Account Properties</li> <li>Add / Edit / Delete Virtual Accounts</li> <li>Add / Edit / Delete Users (at SA and VA level)</li> <li>View / Accept Agreements</li> <li>View Event Logs</li> </ul>	<ul style="list-style-type: none"> <li>Can perform all activities in Smart Software Manager at Smart Account Level and Virtual Account Level</li> </ul>	<ul style="list-style-type: none"> <li>Can perform all activities in EA Workspace linked to the Smart Account they have access to</li> </ul>	<ul style="list-style-type: none"> <li>Can perform all activities in LRP linked to the Smart Account they have access to</li> </ul>
Smart Account User	<ul style="list-style-type: none"> <li>View Account Properties</li> <li>View Virtual Accounts</li> <li>View Users (at SA and VA level)</li> <li>View Agreements</li> <li>View Event Logs</li> </ul>	<ul style="list-style-type: none"> <li>Can perform all activities in Smart Software Manager at Smart Account Level and Virtual Account Level</li> </ul>	<ul style="list-style-type: none"> <li>Can perform all activities in EA Workspace linked to the Smart Account they have access to</li> </ul>	<ul style="list-style-type: none"> <li>Can perform all activities in LRP linked to the Smart Account they have access to</li> </ul>
Virtual Account Administrator	<ul style="list-style-type: none"> <li>View Account Properties</li> <li>View Assigned Virtual Accounts</li> <li>Add / Edit / Delete Users (capability to add Virtual Account Admins or Virtual Account Users)</li> <li>View Agreements</li> <li>View Event logs (restricted to assigned VAs)</li> </ul>	<ul style="list-style-type: none"> <li>Can perform all activities in SSM for the Virtual Accounts they have access to</li> </ul>	<ul style="list-style-type: none"> <li>Can perform all activities in EA Workspace linked to the Virtual Account they have access to</li> </ul>	<ul style="list-style-type: none"> <li>Can perform all activities in LRP linked to the Virtual Account they have access to</li> </ul>
Virtual Account User	<ul style="list-style-type: none"> <li>View Account Properties</li> <li>View Assigned Virtual Accounts</li> <li>View Users (only those linked to assigned VAs)</li> </ul>	<ul style="list-style-type: none"> <li>Can perform all activities in SSM for Virtual Accounts they have access to</li> </ul>	<ul style="list-style-type: none"> <li>Can perform all activities in EA Workspace linked to the Virtual Account they have access to</li> </ul>	<ul style="list-style-type: none"> <li>Can perform all activities in LRP linked to the Virtual Account they have access to</li> </ul>

Account Management for Customer Smart Accounts is done within CSC  
License management and activation is done in SSM

CCW Order View Management  
incorporated for Holding Accounts.

For more detailed information,  
go to the [Smart Accounts Roles Training](#)

# Grant Partner Access to Manage Smart Account

You can grant Partners access to manage your Smart Account and your licenses by adding them as a User.  
There are 4 user roles that you can assign Partners to:

Role	Access Level	Select this when...
Smart Account Administrator	Partners can view and manage license inventory for the entire Smart Account, and can also perform Account management activities.	You can select this option if only one Partner will be managing your entire Smart Account, and also if the Partner needs to manage Users and Virtual Accounts on your behalf.
Virtual Account Administrator	Partners can view and manage licenses only in specific Virtual Account(s) for which they have been granted access. Partners can also manage Users in the assigned Virtual Account(s).	You can select this option if the Partner will be managing licenses in specific Virtual Account(s) but not within all the Virtual Accounts. Please note that the Partner will also be able to manage Users for the assigned Virtual Account(s).
Smart Account User	Partners can view and manage license inventory for the entire Smart Account.	You can select this option if the Partner will be managing your entire Smart Account, but you would like to keep control over the Account management activities (adding/ deleting Virtual Accounts and User management).
Virtual Account User	Partners can view and manage license inventory for assigned Virtual Account(s).	You can select this option if the Partner will be managing licenses within a particular Virtual Account, but you would like to keep control over adding or

Please note that by authorizing a Partner User to access your Smart Account, you implicitly acknowledge that it will enable the Partner User to access all the information within the Smart Account that includes Licenses, Devices, etc.

In addition, please note that as a Customer you are responsible for all the actions performed by your Partners, which includes any licensing transactions as well.

# Role Based Access Control (RBAC): Roles Mapped to Cisco Tools

# Tools Key

Cisco Software Central (CSC)

[Software.cisco.com](https://software.cisco.com)

Smart Software Manager (SSM)

For Smart Licenses

Enterprise Agreements (EA)

License Registration Portal (LRP)

For Traditional Licenses

Smart Account Approver

# Smart Account Approver

What capabilities does this role have in each Cisco tool?

CSC	SSM	EA	LRP
Edit/View Account Properties	No Access	No Access	No Access
View Users at Smart Account & Virtual Account Level			
View / Accept Agreements			
View Event Logs			

Smart Account Administrator

# Smart Account Administrator (1/7)

What capabilities does this role have in Cisco Software Central?

Cisco Software Central (CSC)
Edit / View Account Properties
Add / Edit / Delete Virtual Accounts
Add / Edit / Delete Users (at Smart Account and Virtual Account levels)
View / Accept Agreements
View Event Logs

# Smart Account Administrator (2/7)

What capabilities does this role have in Smart Software Manager?

**SSM → Can perform all activities in Smart Software Manager.**

Virtual Account Level	
View all Virtual Accounts	View / Run Reports
View / Hide / Reminder Later / Trouble shoot Alerts	Setup Email Notifications
Create / Revoke / Remove Tokens	View / Add New Satellites
View / Transfer Licenses	File Sync / Remove / Download Authorization Files
View / Transfer / Remove Product Licenses	View Event Logs

# Smart Account Administrator (3/7)

What capabilities does this role have in Smart Software Manager?

SSM → Can perform all activities in Smart Software Manager.

Account Level

View Transaction History

View Event Logs

View Help

View/Accept Smart Licensing Agreement

# Smart Account Administrator (4/7)

What capabilities does this role have in the EA Workspace?

EA → Can perform all activities in EA Workspace linked to the Smart Account they have access to.

View EA Homepage	Manage Devices	View Transactions
View user profile	Customize view of devices	Customize view of transactions
View active contracts	Add devices	View transaction details
Manage EAs	Transfer Licenses (RMA)	Access Support
Customize view of EA	Transfer Licenses (Rehost)	Access “Customer Support”
Generate Licenses	License Resend	View Help content
Provision Software	License Download	

# Smart Account Administrator (5/7)

What capabilities does this role have in the EA Workspace?

EA → Can perform all activities in EA Workspace linked to the Smart Account they have access to.

Manage Reports

View License Consumption by Technology

View License Consumption by Devices

View License Consumption by Features

View License Consumption by Details

# Smart Account Administrator (6/7)

What capabilities does this role have in the License Registration Portal?

LRP → Can perform all activities in LRP linked to the Smart Account they have access to.		
Get New Licenses, Manage PAKS/Tokens	Licenses	Transactions
Add New PAKs/Tokens	Download License	Detail Transaction Information
Get New Licenses	Resend License	Org Information
Consolidate Selected Tokens	Rehost / Transfer	Transaction History
Remove Selected PAKs / Tokens	Complete Secure Rehost / Transfer	Cancel Transaction
Assign to a Smart Account	Assign to a Smart Account	

# Smart Account Administrator (7/7)

What capabilities does this role have in the License Registration Portal?

LRP → Can perform all activities in LRP linked to the Smart Account they have access to.		
Devices	Get Other Licenses	View Help
Add Device	Demo and Evaluation	View Help
Download License	Telepresence Software Release Key	View in French
Resend License	Telepresence License to Resend	
RMA	IPS, Crypto, Other	
Rehost / Transfer	Email and Web Security Appliance	
Complete Secure Rehost / Transfer	Main to Backup	
Assign to a Smart Account	Register ROSA HA as Pair	
	Migration	

Smart Account User

# Smart Account User (1/7)

What capabilities does this role have in Cisco Software Central?

Cisco Software Central (CSC)
View Account Properties
View Virtual Accounts
View Users (at Smart Account and Virtual Account Level)
View Agreements
View Event Logs

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Virtual Account Administrator

# Virtual Account Administrator (1/7)

What capabilities does this role have in Cisco Software Central?

Cisco Software Central (CSC)
View Account Properties
View Assigned Virtual Accounts
Add / Edit / Delete Users (capability to add Virtual Account Admins or Virtual Account Users)
Add / Edit / Delete Virtual Accounts: VA Admins can now create Nested Virtual Accounts under the Virtual Account for which they have the VA Admin role
View Agreements
View Event logs (restricted to assigned Virtual Accounts)

# Virtual Account Administrator (2/7)

What capabilities does this role have in Smart Software Manager?

**SSM → Can perform all activities in SSM for the Virtual Accounts they have access to.**

Virtual Account Level	
View all Virtual Accounts (only for Virtual Account related rows they have access to)	View Event Logs
View / Hide / Reminder Later / Trouble shoot Alerts	View / Run Reports for Virtual Account information they have access to
Create / Revoke / Remove Tokens	Setup Email Notifications (receive information for Virtual Accounts they have access to)
View / Transfer Licenses	View / Add New Satellites
View / Transfer / Remove Product Licenses	File Sync / Remove / Download Authorization

# Virtual Account Administrator (3/7)

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Account Level
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View Event Logs (only for Virtual Account related rows they have access to)
View Help
View Smart Licensing Agreement

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Get New Licenses	Resend License	Org Information
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Create / Revoke / Remove Tokens	View / Add New Satellites
View / Transfer Licenses	File Sync / Remove / Download Authorization Files
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# Virtual Account User (3/7)

What capabilities does this role have in SSM?

SSM → Can perform all activities in SSM for Virtual Accounts they have access to.

Account Level

View Transaction History (only Virtual Account related rows they have access to)

View Event Logs (only Virtual Account related rows they have access to)

View Help

View Smart Licensing Agreement

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Add New PAKs/Tokens	Download License	Detail Transaction Information
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Consolidate Selected Tokens	Rehost / Transfer	Transaction History
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RMA	IPS, Crypto, Other	
Rehost / Transfer	Email and Web Security Appliance	
Complete Secure Rehost / Transfer	Main to Backup	
Assign to a Smart Account	Register ROSA HA as Pair	
	Migration	

# Nested Virtual Accounts

# Smart Account Roles and Nested Virtual Accounts

You can create multiple levels of Virtual Accounts within one Smart Account.

- You can create multiple Virtual Accounts within your Smart Account to subdivide your assets and ensure role-based access control.
- You can create a Virtual Account At Top-Level, or a Virtual Account Nested under an existing Virtual Account. This option allows you to create multiple levels of Virtual Accounts (up to 10 levels of Virtual Accounts).

Virtual Accounts should be used to enable access control for licenses.

- Virtual Account Users are only assigned to a Virtual Account, so they can only manage licenses in that Virtual Account.
- Role Inheritance: a Virtual Account Role can be granted to a specific Virtual Account or to a Virtual Account and all its children (all the Nested Virtual Accounts under that specific Virtual Account).

Smart Account and Virtual Account Role selection

The Role selection is based on scope of the role that the Smart Account Admin or the Virtual Account Admin is trying to grant to a new User:

- Smart Account Roles are presented when the scope of access is the Entire Smart Account.
- Virtual Account Roles are presented when the scope of access is Selected Virtual Accounts.

# Additional Resources

## Additional Resources for Partners and Customers

Here you will find some additional Resources for your reference:

Location	Description
<a href="http://cisco.com/go/smartaccounts">http://cisco.com/go/smartaccounts</a> <a href="http://cisco.com/go/smartlicensing">http://cisco.com/go/smartlicensing</a>	Cisco Smart Accounts Overview Cisco Smart Software Licensing Overview
<a href="#">Training Schedule</a> <a href="#">Orderable Smart Licensing SKU List</a> <a href="#">FAQ</a> <a href="#">Software On-Demand Training Resources for Customers</a> <a href="#">Cisco Software Smart Account Administration for Customers</a>	Additional Software training and informational resources

