Asset Transfer Manager

Step-by-Step Guide for Asset Transfer Users

(Currently not available for Enterprise Agreement and OnPrem assets)

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April 2024

Preface

Purpose

This document contains information to become familiar with Asset Transfer Manager and a step-by-step process on how to transfer Cisco Assets between two Customer Smart Accounts.

Intended Audience

- Cisco Customers
- Partners (with Administrator access to Customer Smart Account)
- Cisco Licensing Operations

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Table of Contents

Section 1 Foundation	○ Chapter 1: Pre-requisites ○ Chapter 2: Glossary ○ Chapter 3: Transfer Status
Section 2 Asset Manager Overview	○ Chapter 1: Asset Manager Landing Page ○ Chapter 2: Account Selection ○ Chapter 3: Asset Selection ○ Chapter 3: Submission and Validation
Section 3 Help	○ Chapter 1: Frequently Asked Questions (FAQ) ○ Chapter 2: Get Help! ○ Chapter 3: Helpful Links

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Foundation

Provides fundamental principles, functionalities and key aspects necessary to understand and effectively utilize the capability

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Pre-requisites

Pre-requisite	Details
User Role Requirement	The user initiating the asset transfer must be a Smart Account Administrator in both the Source and Target Customer Smart Accounts. Administrators with access to a single Customer Smart Account can still view transaction activities.
No Smart Account Access	If you don't have access to the desired Customer Smart Account, please follow the guide applicable to you: • Get Access to an existing Customer Smart Account here or watch the video guide here • New Smart Account creation guide video here

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Glossary

Term	Definition
Smart Account (SA)	Type of an account that helps to easily view, store and manage ALL your assets and entitlements in one location across the entire organization. It also helps to consolidate user access management.
Virtual Account (VA)	A sub-folder within the SA that helps to internally organize your assets and entitlements.
Assets	Hardware/devices, software, License and Subscriptions
Domain	Domain represents business or organizations on the internet. Example, for email address john@cisco.com, domain is 'cisco.com'
Legal Entity	A company legally registered with the country's law. A Business Unit that is part of a Company is not considered a separate Legal Entity. An Affiliate or Subsidiary is a separate Legal Entity.
Affiliate	Any corporation, firm, partnership, or other entity that directly or indirectly controls, or is controlled by, or is under common control with the Transferor
CCO ID	A CCO ID is your personal login for theCisco.com website. With a CCO ID you can register for trainings, events, programs and promotions and access additional tools and content

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Transfer Status

Term	Definition
Validation Initiated	The process begins with an initial validation check to ensure the asset are eligible to be transferred.
Validation Completed	The asset's eligibility for transfer has been successfully verified.
Pending Submission	Validation for the asset transfer has been completed and is ready for submission.
Submitted	The request for asset transfer has been formally submitted.
Submitted – Awaiting Transferor/Transferee consent	The transaction will only progress upon obtaining consent from the Transferor and Transferee.
Compliance Screening	The transaction is under review to ensure it adheres to regulatory standards.
Compliance Screening Rejected	The transaction has been canceled by the Cisco Legal Team. An email will be sent to you from swtransfer@cisco.com, providing details and reasons for the cancellation.
Transfer Initiated	The actual transfer process has been initiated, moving the asset between Smart Accounts.
Transfer Completed	The asset has been successfully transferred to the new account.
Transfer Completed with Failure	Some of the assets were effectively transferred while others experienced transfer failures.
Cancelled	The transfer request was canceled, and the asset remains with its original owner. (Action only available during Status: Validation Completed)

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Asset Transfer Manager

In this overview you will learn the basics for Asset Transfer

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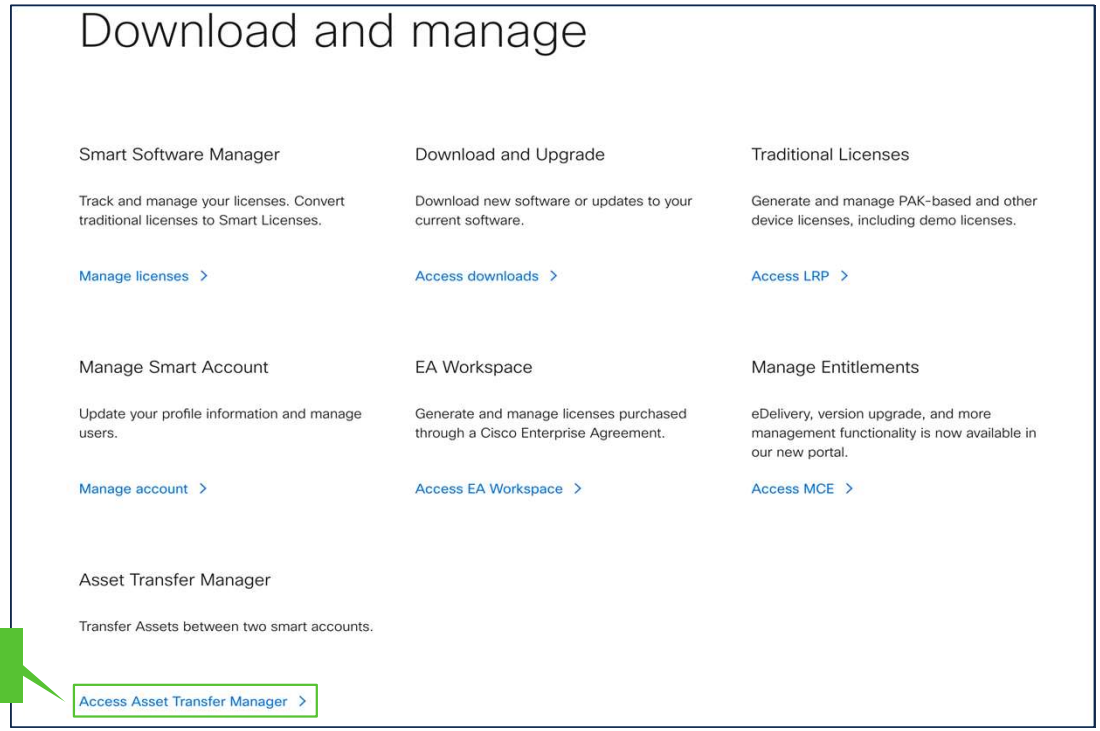
Asset Transfer Manager Landing Page



Click Here

To begin using the Asset Transfer Manager:

1. Log Into software.cisco.com using your:
    - Cisco Credentials (CCO ID and Password)
2. Select Access Asset Transfer Manager

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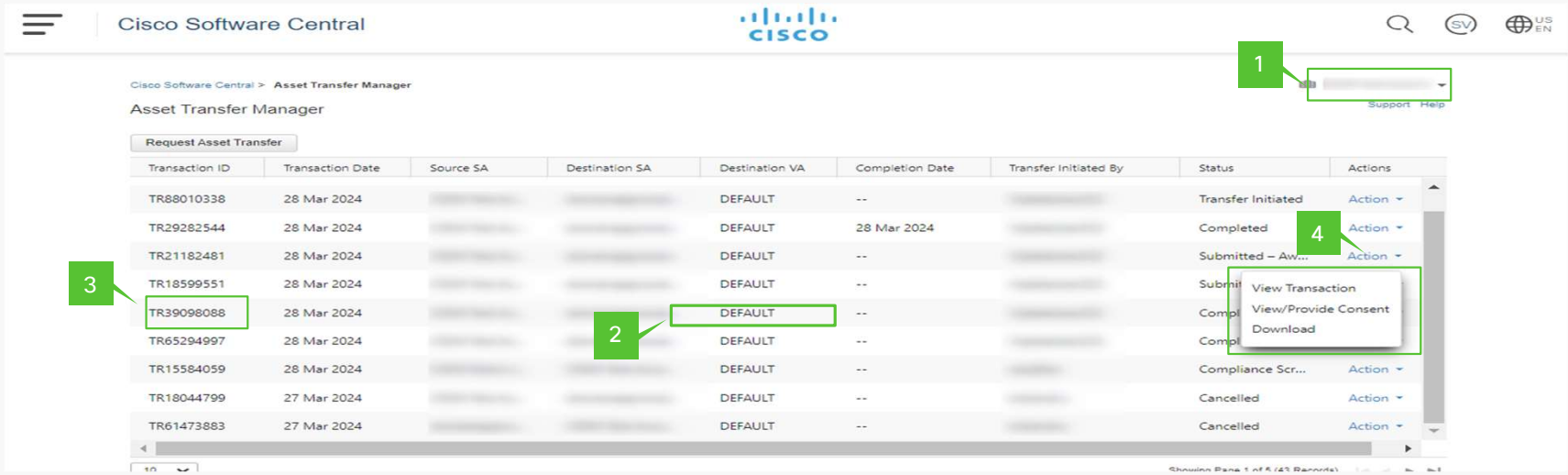
Asset Transfer Manager Landing Page



If you already have access to one or more Smart Accounts (SAs), the platform will:

1. Display the current SA Name
    - Select the SA Name to change it.
    - You can see the incoming and outgoing transactions for the chosen SA
2. Hovering over text areas allows you to view the full content.
    - i.e. You can see the SA Name and Domain Identifier for Source or Destination SA
3. Transaction ID is a randomly generated number
4. Expanding the Action drop-down will present several functions to choose from
    - View Transaction: Access Transaction details directly on the screen
    - View/Provide Consent: Review consent details for assets moving to different legal entities
    - Download: Export Transaction Details as an Excel File

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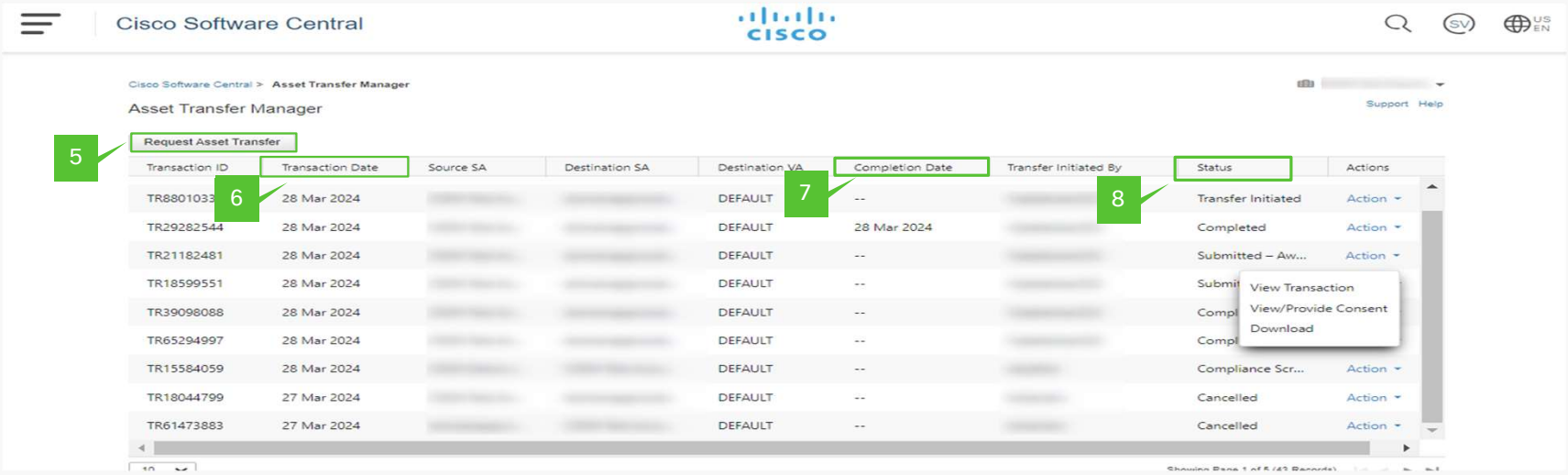
Asset Transfer Manager Landing Page



5. To initiate the transfer process, click "Request Asset Transfer".
6. Transaction Date: The date on which the transfer process was initiated
7. Completion Date is the date when the transfer is finalized.
8. Status field indicates the current situation of the Transaction ID
    - Refer to the Glossary for information on multiple statuses

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Asset Manager Transfer Account Selection

Here we will guide you on how to select the Source and Destination Account for the transfer.

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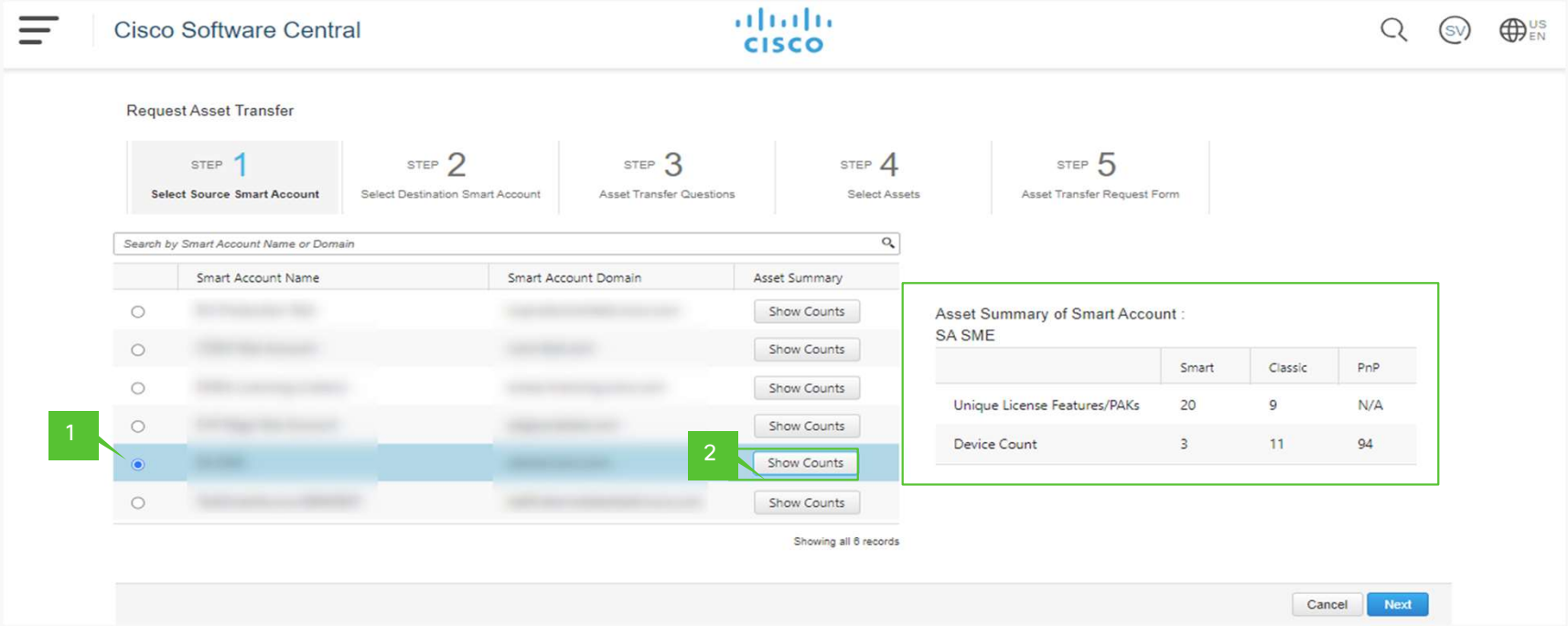
Asset Transfer Manager: Account Selection



Request Asset Transfer, Step 1:

1. Select the source Smart Account:
   - You can select a Smart Account by reviewing their Smart Account Name or Domain
   - You can search by Name or Domain
2. Show Counts:
   - Click Show Count to display unique License Feature / Devices linked to the selected Smart Account

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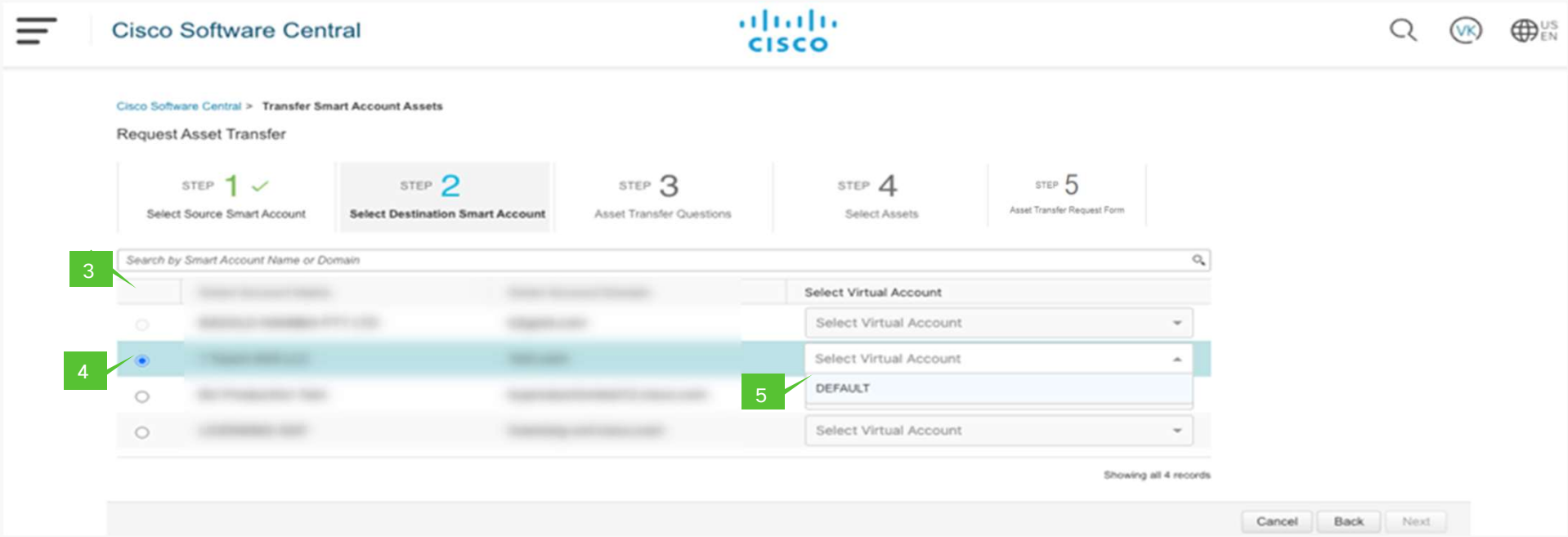
Asset Transfer Manager: Account Selection



Request Asset Transfer, Step 2:

3. Source Smart Account and Virtual Account selection is greyed out.
4. Select Destination Smart Account:
    - You can select a Smart Account by reviewing their Smart Account Name or Domain
    - You can search by Name or Domain
5. Virtual Account Selection Summary:
    - After selecting Smart Account, the Virtual Account selection field will be available for selection

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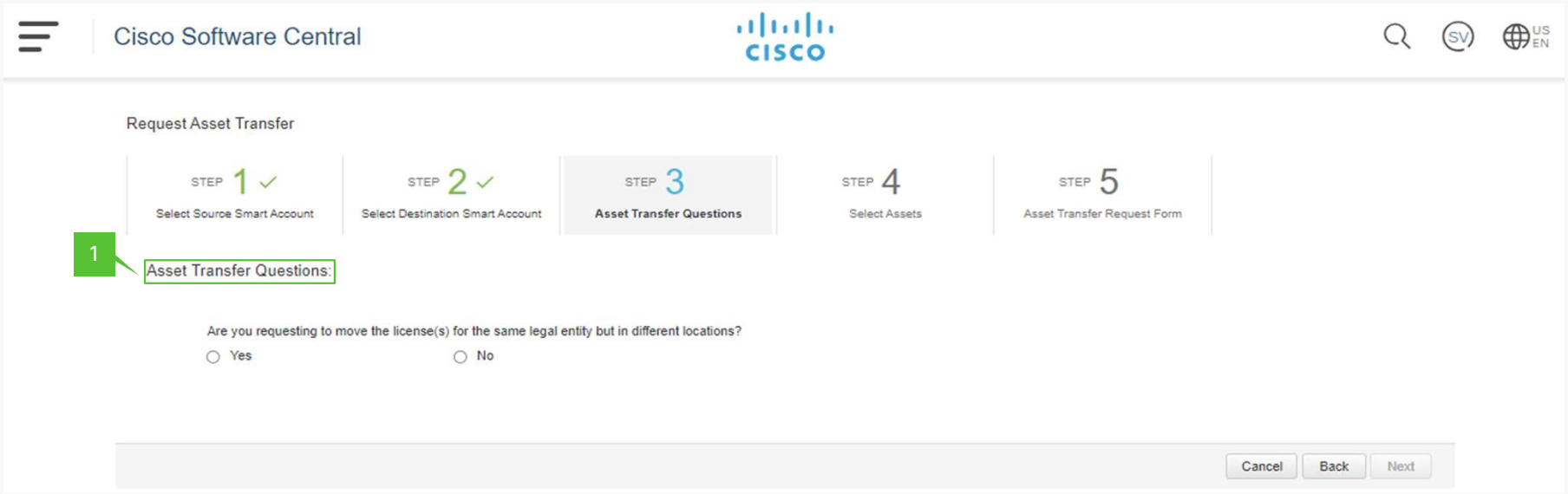
Asset Transfer Manager: Account Selection



Request Asset Transfer, Step 3:

1. Compliance Assessment Questionnaire

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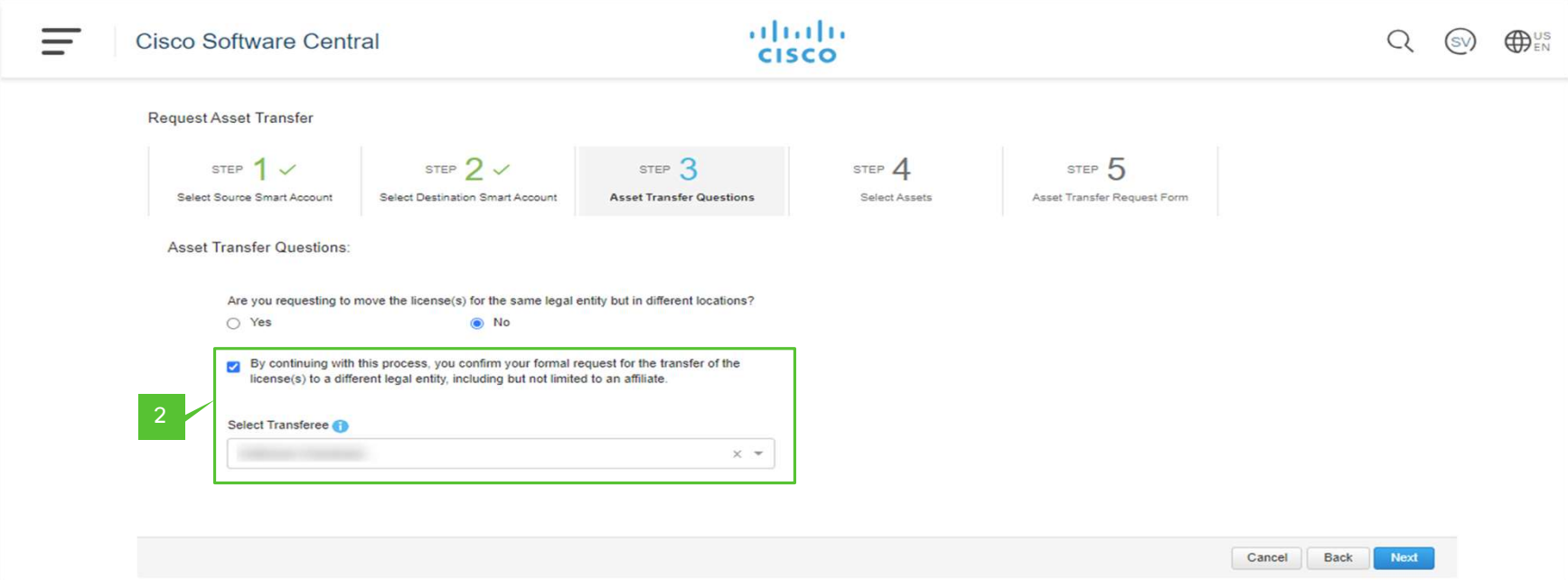
Asset Transfer Manager: Account Selection



Request Asset Transfer, Step 3:

2. Approval/Consent from the Destination Customer Smart Account Administrator/Nominee is essential when transferring assets to a different legal entity, which could include an affiliate.

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Asset Manager Transfer – Asset Selection

Here we will show how to select the Assets for the transfer

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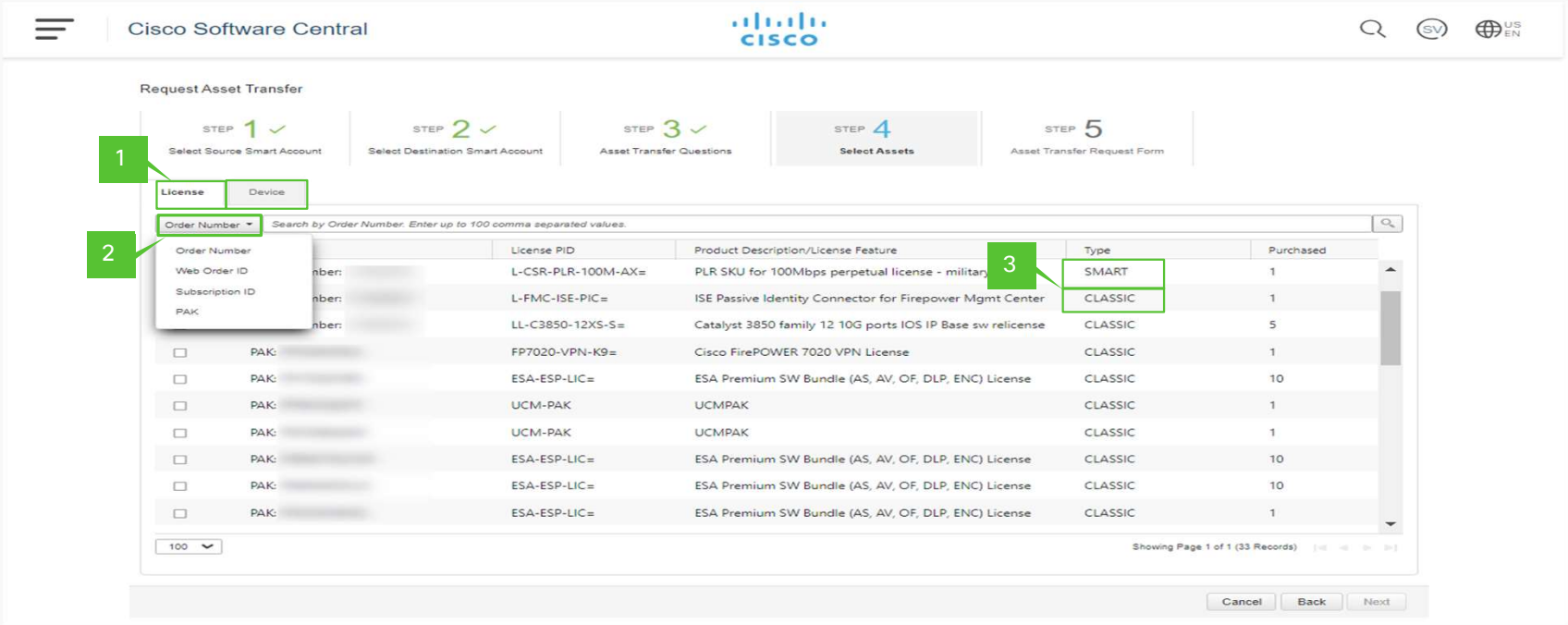
Asset Transfer Manager: Asset Selection



Request Asset Transfer, Step 4:

1. Displays Licenses and devices linked to the Customer Smart Account, eligible for transfer.
2. Search options to choose from:
   - Order Number, Web Order ID, Subscription ID, PAK or Manual Entries
3. Indicates the Licensing Technology

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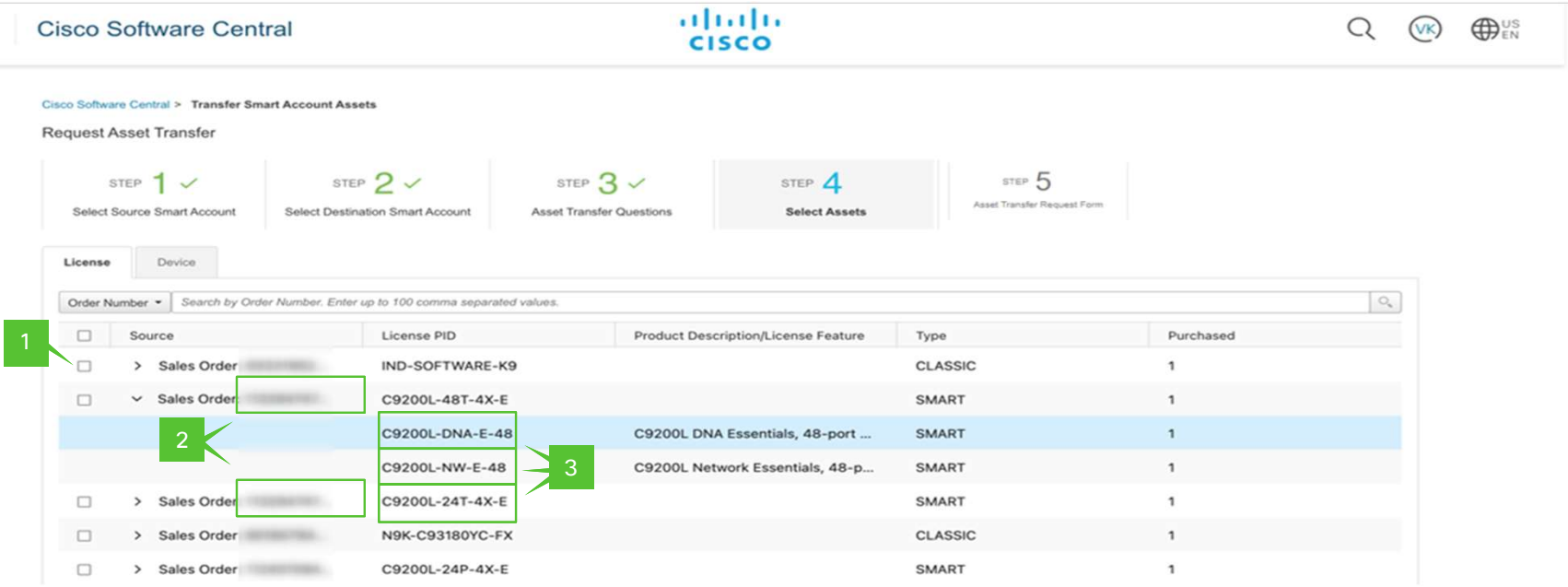
Asset Transfer Manager: Asset Selection



Request Asset Transfer, Step 4:

1. Each Source: Sales Order indicates that this is a major Sales Order line.
   - Selecting “>” will reveal all licenses beneath it coming from Minor Lines (example 1.1 or 1.4).
2. Expect to find multiple instances of the same Sales Order, representing different Major Lines (e.g., line 1.x or 2.x).
3. When you expose all licenses through ">", the first PID is the Major Line PID
   1. Subsequent PIDs are the Minor line license PIDs

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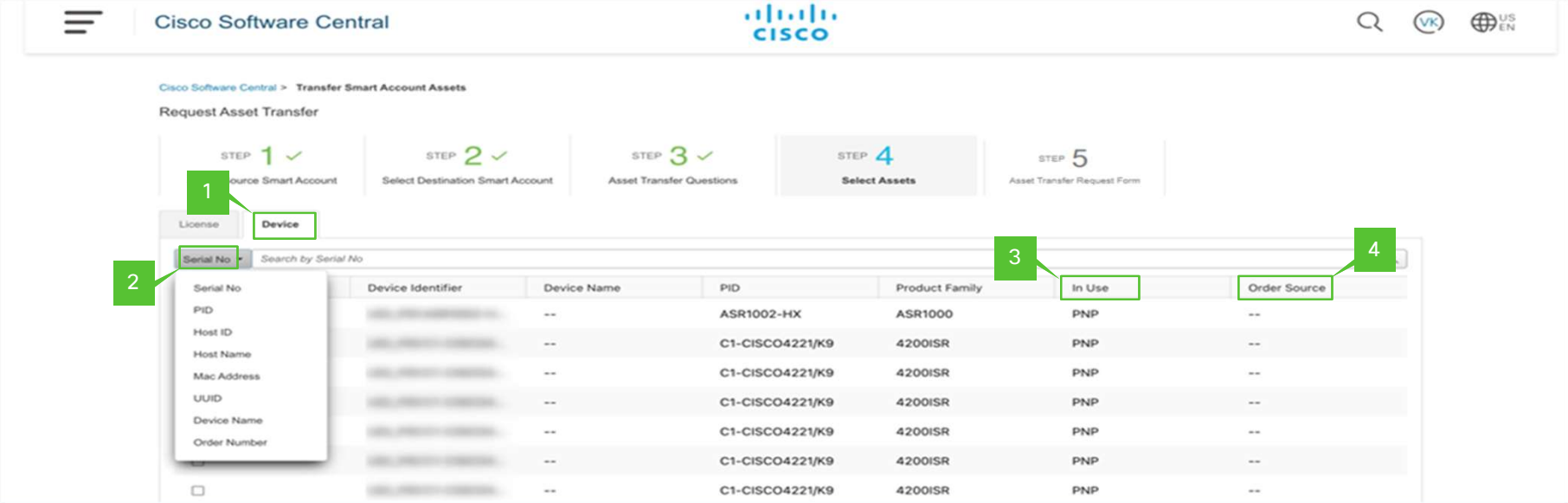
Asset Transfer Manager: Asset Selection



Request Asset Transfer, Step 4:

1. Move assets from the Device Tab.
2. Search options to choose from:
   - Serial Number, PID, HOST ID, UUID, and more.
3. Indicates if a device active and, if so where it is being utilized.
4. Present the order number associated to the Device.

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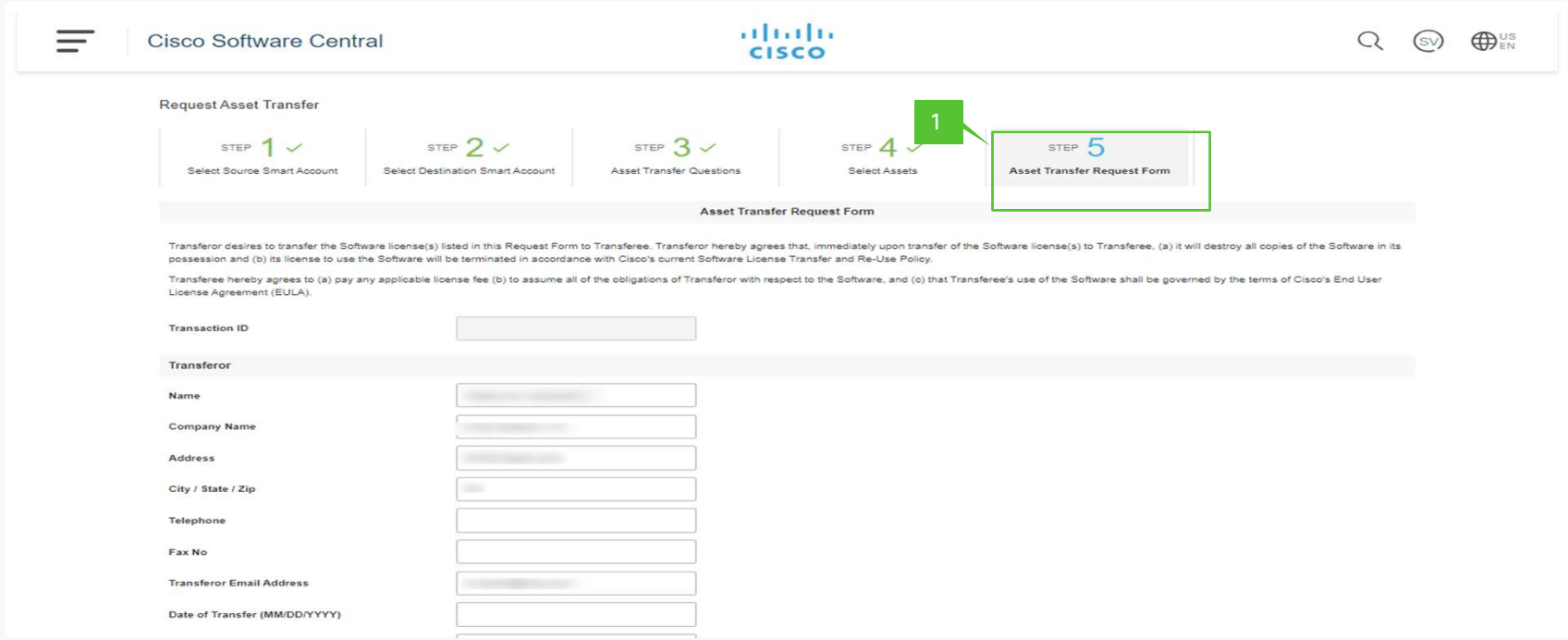
Asset Transfer Manager: Software License Transfer Request Form



Request Asset Transfer, Step 5

Transferring assets between two different legal entities requires the mandatory completion of the Software License Transfer Request Form

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Asset Transfer Submission and Validation

Here you will learn how to finalize the Asset Submission

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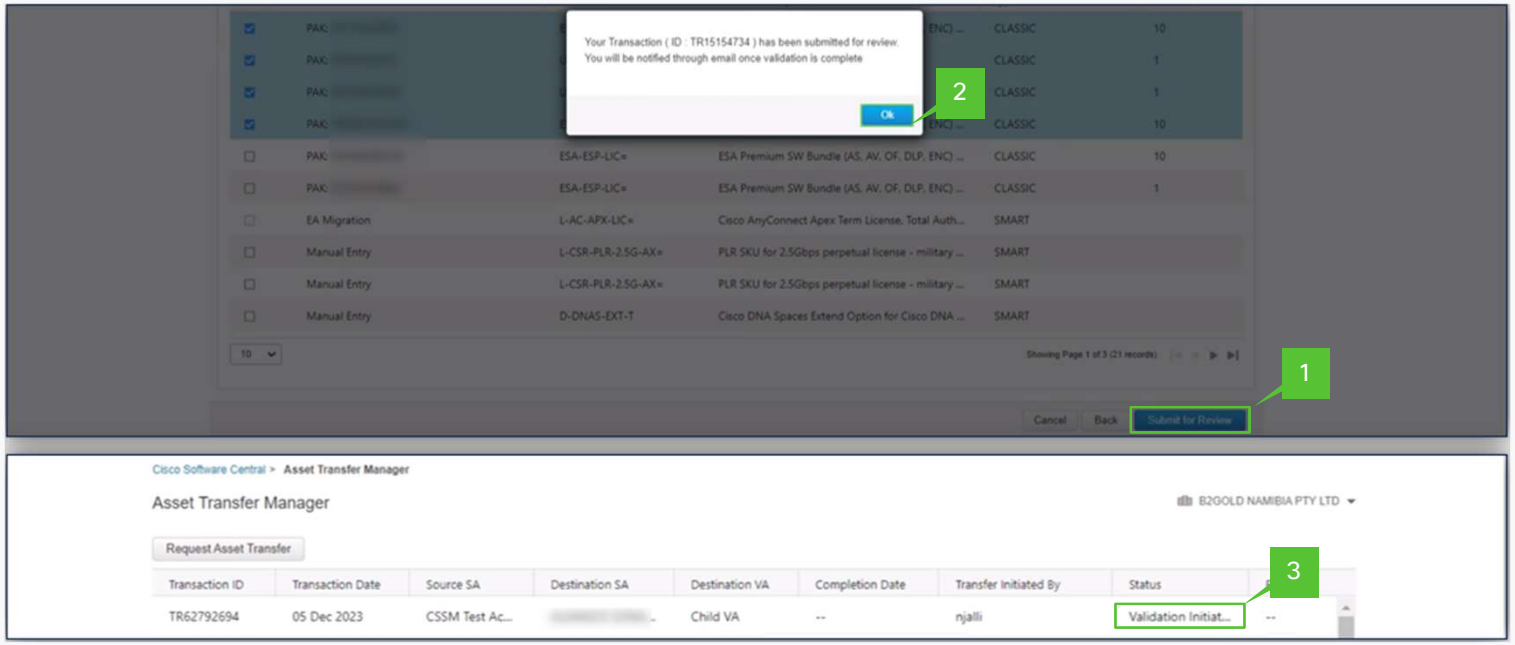
Asset Transfer Manager: Submission and Validation



1. After choosing the asset for transfer, click on "Submit for Review.“
2. Following a successful submission, a unique “Transaction ID” is generated for the transfer.
3. "Validation Initiated" indicates the ongoing verification process of the requested transfer assets for their eligibility. Once finalized, the status will be updated to “Pending Submission”

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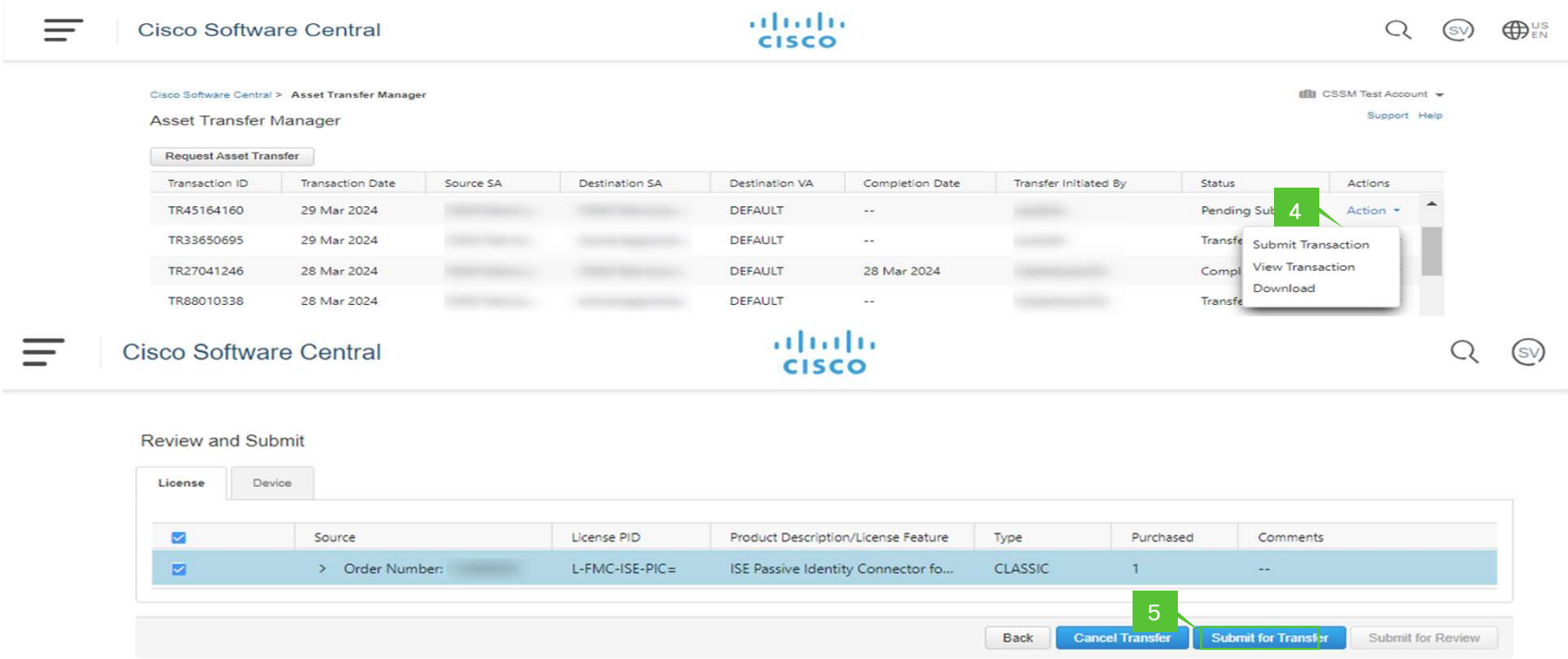
Asset Transfer Manager Submission and Validation



4. Click on the Transaction ID to examine the chosen assets before the submission is finalized.
5. Click to conclude the asset transfer process.

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Asset Transfer Manager: Submission and Validation

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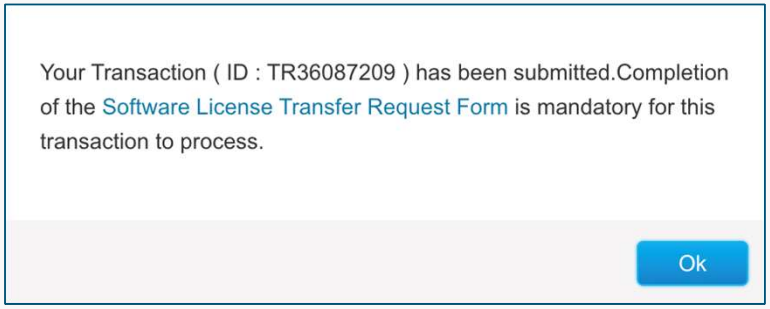

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Based on the Asset Transfer Questions in Step 3 one of the two overlays will appear:

6. The submission for the transaction is completed, but the asset transfer will proceed only upon submission and approval of the compliance screening form.

7. The transaction submission is finalized, and you will receive a notification upon the transfer completion.

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Asset Manager Help

Here you will be guided to our FAQ and help links

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Frequently Asked Questions (FAQ)

What is an Asset Transfer Manager?
Asset Transfer Manager is a platform to view and transfer assets (License, Devices) between two Customer Smart Accounts.

What are the prerequisites to access Asset Transfer Manager?
Asset Transfer Managers leverage the Smart Account construct, hence an Administrator access in multiple Smart Accounts is required to use the capability.

How do I access Asset Transfer Manager?
Asset Transfer Manager can be accessed from Software Central (software.cisco.com) .
Your permission to access Asset Transfer Manager is based on your access privilege in both the Smart Accounts (Source and Destination Smart Account).

What assets are displayed in Asset Transfer Manager?
License Tab: Cisco License Enabled products (Smart Licensing, Classical Licensing)
Devices Tab: Cisco Devices that are associated to your Customer Smart Account

What actions can I perform using Asset Transfer Manager?
Initiate Asset Transfer between Customer Smart Accounts
Review status of present and past transactions
Export Present and Past Asset transfers

What assets are restricted to transfer?
Currently, assets connected to an Enterprise Agreement and Devices connected to an OnPrem account cannot be transferred

Can a Partner use Asset Transfer Manager to Transfer Assets?
If granted a role as Administrator in both the Customer Smart Accounts, Yes, the partner can act on behalf of the End Customer and transfer assets between Customer Smart Accounts.

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Do I need to re-register my device once it is moved to a different Smart Account?
No, once transferred, the device need not be re-registered to the new Customer Smart Account.
Post transfer of assets managed through CSLU; it is essential to update the Smart Account information in the preference to enable effective communication with the updated Smart Account

Will I get notified about the progress of my transaction?
Yes, an automated email notification will be sent once the transaction is completed.
The latest updates can also be found by accessing the transaction in Asset Transfer Manager.

Can I stop the Asset Transfer?
Once the asset transfer is successfully submitted, it cannot be revoked or aborted.

Where can I find support for my questions?
Explained in the Help & Additional resources

When are the assets going to be transferred?
Assets will only be transferred following the completion and approval of the compliance screening process.

What if I move a license that is already in use?
The device using the license will fall out of compliance.

Can I move assets not associated with a Smart Account?
No

Can I move assets associated with an Enterprise Agreement buying model?
Currently, this is not available

Can I move devices associated with an On-Prem Virtual Account?
Currently, this is not available

What happens when I move a reserved license from the Source Account?
Devices using reserved license in the Source Smart Account will remain as reserved in the Destination Smart Account.

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Can I move assets and devices from Plug and Play (PNP)?
License assets and devices in Plug and Play can be moved independently as they are not interconnected.

What if my asset is not presented in the Smart Account before transfer?
Any asset not present in the Customer Smart Account will not be factored into consideration.

Can I split my asset quantity?
Splitting the asset quantity is not possible; it will be transferred in full.

Should I proceed with my pending upgrades before or after the transfer?
Ensure completion of all pending upgrade transactions before initiating the transfer.

Once the assets are transferred to the new Smart Account, will the modification be visible in CCW/MCE ?
Unfortunately, updates to that specific order in MCE/CCW are not part of the current activities, but there is possibilities of addressing that in future.

During the asset transfer process, can transfer of certain asset encounter a failure ?
For more complex and interwoven asset transfers, the system may encounter challenges in determining the optimal flow for transferring assets. Consulting Cisco Licensing operations becomes essential for a thorough evaluation and resolution.

Is there a timeframe of duration for these transfers?
The timeframe may vary depending on multiple factors, including the questions asked during the transfer process, as well as the timeliness of response from the transferor/transferee.

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Help & Additional Resources

Help

Here is a link on how to open SCM Support ticket here, then select the steps below:

1. Software Licensing
2. License Management
3. Move Licenses
4. Re-assign licenses between SA including HA

Additional Resources

- Smart Account Overview
- Smart Licensing Overview

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The bridge to possible