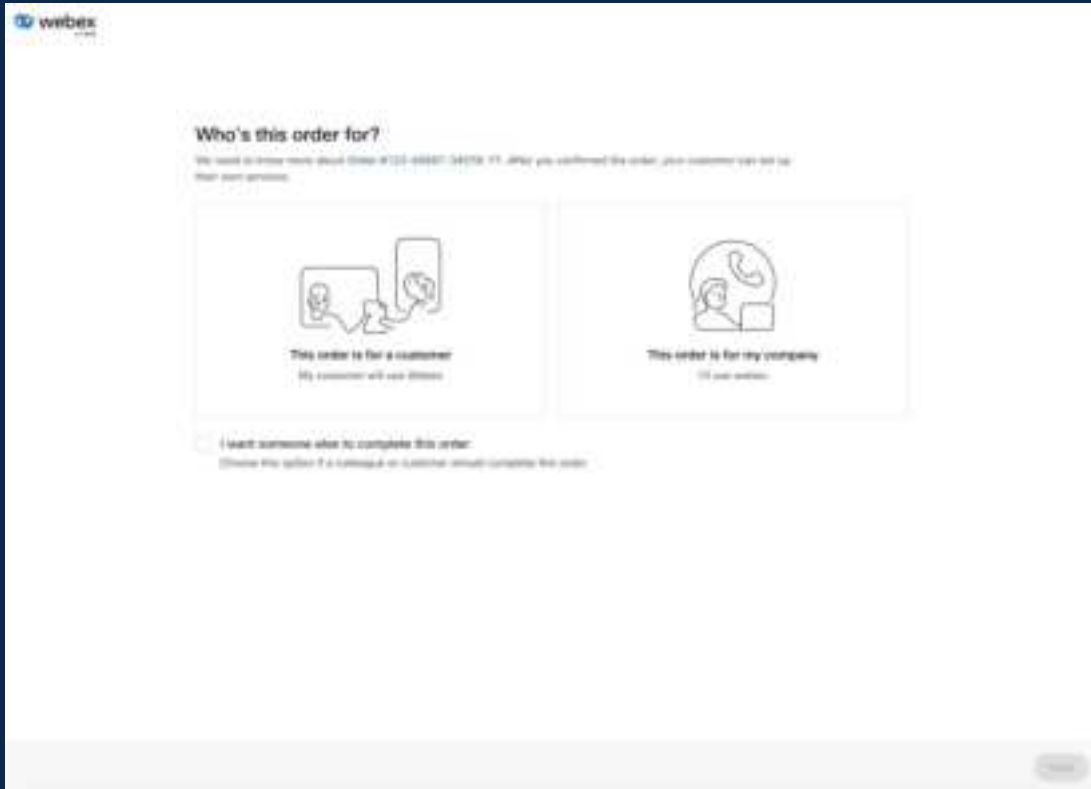**CISCO**

The bridge to possible

Webex Control Hub (WCH) : Provisioning Wizard
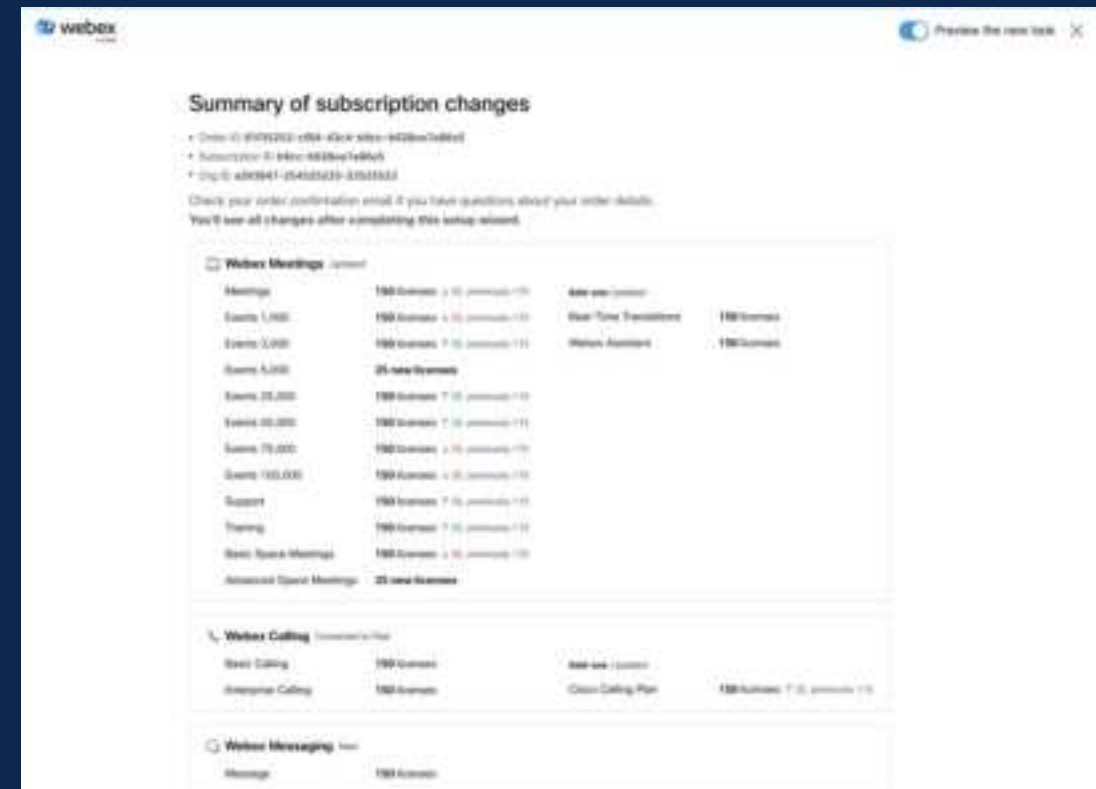
July 2022

Contents

- Highlights of the new experience

- Step-by-step: Organization finder

- Step-by-step: Service setup

- Resources

Terminology: Two Parts

Organization Finder
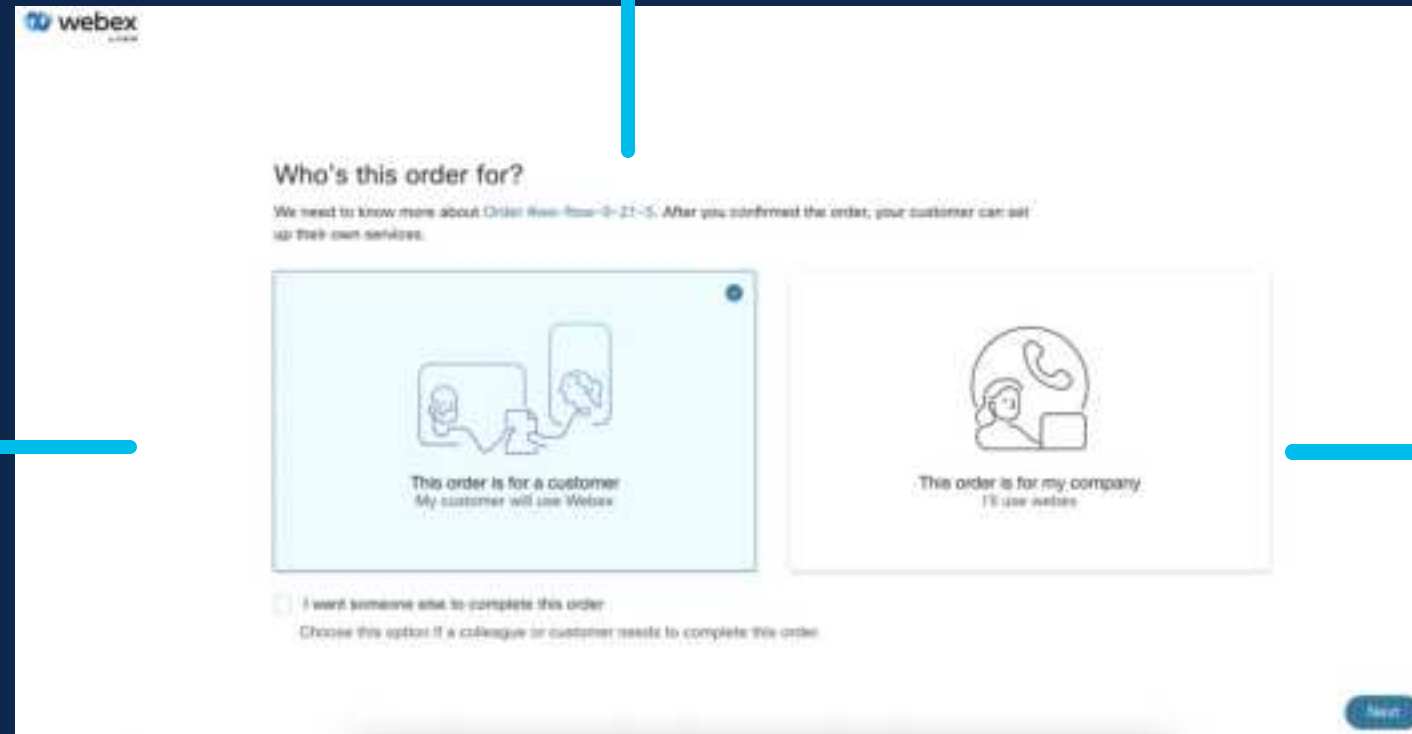Identifies the right person + org to complete provisioning

Service Setup
Collect essential provisioning parameters to spin up services + provision licenses

Highlights of the New Experience

User-centric Prompt

Preview the order content
This link will give a sneak-peak of subscription overview (first page of service setup)

Removing "I am a partner"
By asking about the intent of the order, there is no need to understand 'partner' or 'customer' terminology

For internal use
NFR subscriptions for partner orgs can be accommodated through this option

Identify the right Organizations

Iterate quickly
Have a few addresses that could belong to the customer?
Quickly see if they have an existing org through a global domain-based search

Active vs stale orgs
This field captures the most recent activity across users in the org

Step through the pages
Skip to any previous screens by clicking on the header. Your inputs won't be lost when you return

Org recommendation
Sometimes, an org will stand out above the rest as a potential match. That org will be marked as 'suggested'. (more details in following slides)

Review before proceeding

Review the orgs
If you feel unsure about the org, you can go back and search for the right one.

Know your rights
Provisioning an order to an existing org will mean that the partner will have the 'provisioning admin' role.

Step-by-step: Organization Finder

Receive the Provisioning email

On the customer's requested start date, receive this email.

The email is sent to the 'provisioning contact' when placing the order.

If you haven't received this email, check the spam folder. Otherwise, contact Cisco ordering support team/XaaS helpdesk team.

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CISCO Webex

Next step, set up your service.

Order woid-rm-test-1
Subscription Sub-rm-test-1
End Customer Atlas_Test_ordersimp_RM Test Customer

This is a reminder that you have not set up your services yet. Please note that this is a necessary step without which the services you have purchased will not be available for use.

Your subscription starts and is eligible to be invoiced on the earlier of (i) 20 days from the date of this email or (ii) the date any portion of the subscription is provisioned by Cisco. Please use the link/button below to provide the required provisioning information right away so that you will have use of the subscription for the full term.

Do not forward this email. If you would like to delegate provisioning to someone else, please click the "Set up your service" button below and enter their email in the wizard.

Set up your service

Get started with the Organization finder

This portion of the first-time setup experience is meant to assist with:

1. Finding the right person who can complete the order

2. Finding the right Control Hub organization for both partner and customer

3. Navigate to the services setup once steps 1 and 2 are complete

Who's the Order for?

It's important to first identify who the order is for. Here's how you can select the right option:

If you are a partner that ordered Webex for a customer, then select 'This order is for a customer'

If you are a partner that ordered Webex for your own company, select "This order is for my company"*

If you are a customer that ordered Webex (e.g., from a partner), select 'This order is for my company"

Option 1: This order is for a customer

If you are not the right person to provision this order, you can provide your colleague's email. They will then receive the same provisioning email.

If you used a mailer alias as the provisioning contact, it's best to provide a real user email at this time. Provide the user's email in 'colleague's email address' field.

If you want the customer to provision this order, you can do so by selecting 'my customer will provision this order'. But you will *not* gain access to their Control Hub once provisioning is complete.

Option 1: This order is for a customer

This option will involve the following:

- Identify the Partner org

- Identify the Customer org

- Verify and submit (and continue to service setup)
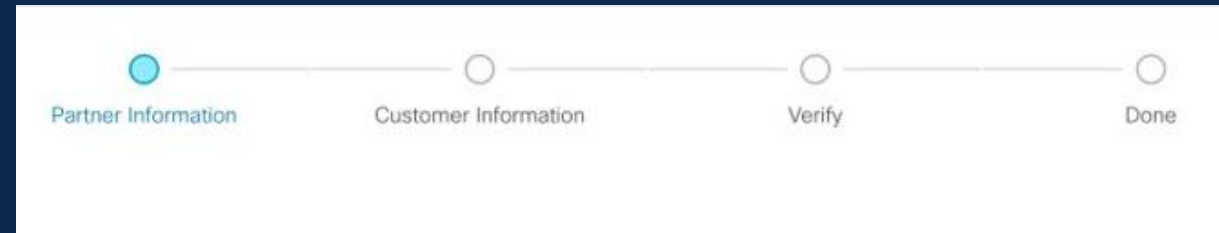
Option 2: This Order is for my Company

If you are not the right person to provision this order, you can provide your colleague's email. They will then receive the same provisioning email.

If you used a mailer alias as the provisioning contact, it's best to provide a real user email at this time. Provide the user's email in 'colleague's email address' field.

Option 2: This Order is for my Company

This option will involve the following:

- Identify my Organization

- Verify and submit (and continue to service setup)

Identifying the right Organization

Whether you are looking up a partner org or a customer org for this order, organization finder uses the email of the contact to identify potential matches.

There are 3 potential results from any org search:

1. Email exists in a Control Hub org, or that domain (e.g., @acme.com) is claimed by one org (see right)

2. Email does not exist, but the domain matches that of users in existing orgs

3. No matches. Create a new org

Identifying the right Organization – Result 1

When the email exists in an organization or the domain has been claimed (such that users must only exist in that one org), then this screen (see right) will appear.

In this scenario, the option to create a new org is not available.

Review the details of the org and proceed.

Identifying the right Organization – Result 2

When the user doesn't exist yet in Control Hub, but their domain (e.g., @acme.com) matches that of other users in Control Hub, then those orgs will appear (see right).

Review the details of each org, but take particular notice of the org that you already manage and/or is suggested to you.

In this scenario, the option to create a new org is available, in case none of these orgs are appear to be the desired org.

Review and submit – "this order is for my customer"

This screen shows the order being mapped to this partner and customer org. The partner now gains access to manage this customer org.

The 'provisioning administrator' text shows when the partner is mapping the order to an existing customer org. The partner can provision the order as usual, but to further manage the customer (e.g., license users), the customer will need to elevate their privileges in Control Hub. (help doc)

If you already manage this customer or you are creating this customer org, then this page will mention 'full administrator', and not 'provisioning administrator'.

Review and submit – "this order is for me"

This screen shows the order being mapped to this organization (without a partner mapped to the order). Review the details and proceed to service setup.

Moving on to service setup

If you are a partner provisioning for a customer, you have the option to delegate service setup to the customer by clicking on 'My customer will set up their own services'.

Order Number: 149853-2584-4389
Subscription ID: 2985-3496-349346

Step-by-step: Service setup

Review the details of the Subscription

Review the details of all the licenses included in the subscription. If you are modifying an existing subscription or converting a trial, you will see the net-changes, such as:

- License quantity changes

- New services

- Canceled services

- Converted trial licenses

Order ID: 91f35252-cf84-43c4-b9cc-b928ee7e86e5
Subscription ID: b9cc-b928ee7e86e5

Setting up calling, meetings

Service setup requires only the minimal information to get the ordered services up and running. In some cases, service setup may not ask for information that's already been provided for this customer.

Calling – HQ location, SIP – if setup for the customer org, setup wizard will not ask for this information.

Meeting – meetings URL may still be required for this subscription.
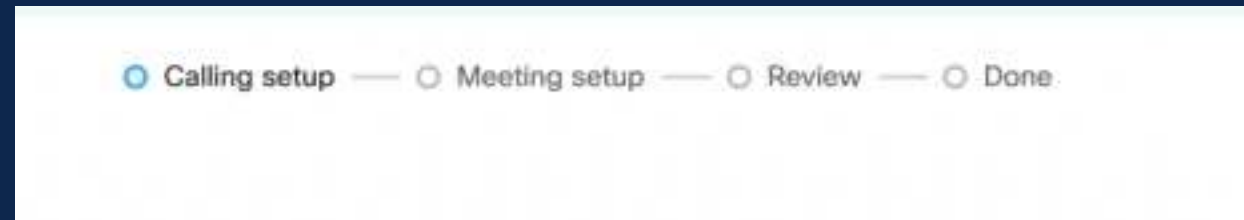
Setting up calling

The only information required at this time is the HQ location of the customer. The address is auto-completed and validated as you enter it in.

SIP address is pre-populated based on company name. Review the details and proceed.

Setting up meeting

In most cases, you will need just one Webex meetings URL. For 'manage users via', it is highly recommended that you select 'Control Hub' (Site Admin is being obsoleted).

By proceeding with one meetings URL, all of the meetings services (e.g., meetings, webinar) will be enabled on this URL.
(https://partnername.webex.com/meet/user)

Setting up meeting with multiple URLs

In certain scenarios, you may want a URL to get early release to features and/or perform sandbox testing. If you do, you will need to distribute licenses across URLs.

Distribute Webex Meetings licenses across URLs

Available licenses

Webinar 5,000
licenses remaining

0

Assign licenses across URLs

⊘ Assigned all available licenses

⊘ All URLs have at least one service enabled

URL: newlightpartners.webex.com Webex Control Hub

Webinar 5,000

5

URL: newlightpartners2.webex.com Webex Control Hub

Webinar 5,000

5

Review before submitting

Review your input information before clicking 'submit'. Clicking on 'submit' is final, so please review the details before proceeding. You can always return to the prior setup steps to edit information.

If you are a partner provisioning for a customer, you will have the option to notify the customer via email as you complete service setup.

Continue to Control Hub

You can download a PDF of the details of this order for future reference. Click on 'close' to continue to Control Hub.

Resources

- [Help Documentation](#)

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