Customer User Center Basics and Strategy

A common question that often arises is "Why would a customer have multiple UC accounts?" This whitepaper is an attempt to answer that question, give recommendations and information and provide ideas on User Center strategy based on previous experience as a customer and time as a Security Engineer at Check Point.

Most customers have multiple User Center Accounts, with some medium to large customers having dozens or more with products spread across them. Often, many of these UCs are unnecessary, redundant, contain unsupported, unused or only one or two products or are inactive. They may also have varying levels of support or security blades bundles.   This can make it difficult to accurately process renewals, validate support, determine what products they are using, etc.

There are many reasons for a customer to have several UC accounts, often it is a lack of understanding or lack of a strategy around UC accounts that contributes to unchecked account sprawl. It is important for Account Managers and Engineers to work with their customers to develop a strategy and standards around their User Center accounts. Doing so will make it much easier to do renewals, create customer heat maps, build rapport with and potentially save them money on support.

The following are some of the most common reasons customers have multiple UCs:

- An individual may not have visibility into all of their employers UC accounts therefore, creates a new / redundant account

- New UCs are created and not properly associated with the company's other accounts. Sometimes this happens when inconsistent information is used when creating a new UC.

- If customers acquire or merge with other companies that have existing User Center accounts or if a company changes its name or spins off business units into separate companies.

- When products are managed by different entities or groups such as a specific line of business, or Subsidiary or MSSP. Or when support / annuity blades are paid for by a separate entity.

- When an organization requires different levels of support on various products. For Example, a Test Lab may have Standard 5 x 9 Business Day Support and Production with Premium, Elite, 4 hour response, etc.

- When Products have different Annuity Blade Bundles (NGFW/NGTP/NGTX)

- When a product or license has specific licensing requirements which make it more efficient to group in a separate User Center.

- When an organization has products that they no longer use, have no intention of using and do not want to pay for support on.

- Global customers may group products based on the geographic location of their products, especially if the product has to be purchased within a specific country.

- An employee attended a training class, received an appliance then created a personal UC to put it in and that UC is tied to their employer. Or, an individual wants to evaluate products at home. This can lead to having many unnecessary UCs associated with a customer.

Basic Information on User Center Accounts:

User Center accounts are basically containers for the products (appliances, accessories, licenses, support contracts, etc.) that a company owns. When a customer orders a product from Check Point, there must be a User Center account assigned to the order so that the correct support discount can be applied and the product be correctly assigned to the customer. User Center Accounts are also used for renewing and providing support for the customer.

Support levels should be consistent between the products and the User Center. Products must have the same or higher level of support that is attached to the User Center in which they reside. Products can be moved to a UC with a lower level of support and will retain the current level of support until the User Center is renewed but products with a lower level of support cannot be moved into UCs with a higher level.

It is important to understand that customers see only the UCs that their login email has been assigned to and not all of the accounts associated with their organization. There is not really a UC Hierarchy or a Parent / Child UC relationship, except internally in Customer Center. UC's are primarily associated with the Customer Name / ID that is used when the UC is created. Internally via Customer Center, as Check Point employees, we can search by Customer Name and it will display the customers UCs but the customers do not have this visibility.

New User Center accounts do not inherit the Users and access rights from existing accounts. Initially only the person who created the UC has access, therefore users must be added to each UC in order to access it or get licenses or support on the products in it. If there are a large number of users that need to be added to multiple UCs, the customer can open a ticket with Account Services, supply the list of registered user emails, access levels, contact types and the UC numbers. It is highly recommend that customers create their own UCs, or at least get an email from the customer (manager level or higher) giving you permission to create them and how to name them, etc. Same applies for moving products between accounts.

Recommendations on creating new User Center accounts:

- Use the "Existing Customer" option when creating a new UC for a current customer!!! This ensures the account is associated properly with the customer and provides consistency between all accounts.

- Be consistent when creating new UC accounts, develop a standard naming convention and a strategy for grouping products together.

- Try to limit the number of active User Center Accounts. Typically, even large customers can get by with 10 or fewer active accounts.

- All companies should have a "BoneYard" UC for products that they no longer use, have no intention of using and do not want to pay for support on. A caution on this is if the customer ever decides to use a product again, they have to pay for support from the time support lapsed and going forward. Sometimes, it is more affordable to purchase a new license or product than paying to catch up on support.

- Group products in User Centers based on the required level of support. For example, Products in labs and test environments may only need 5x9 support, while critical infrastructure may require 7x24 support with 4 hour response.

- For renewal purposes, use different User Center accounts when products have different security blade packages (NGFW, NGTP, NGTX).

- When necessary, group products in User Centers aligned to the group or entity (specific line of business, or Subsidiary or MSSP, etc.) that manages them, or pays for support.

- A Temp UC is sometimes useful for transitioning products or new products

- A User Center to hold appliances that employees get as part of training, evaluation & EA licenses, etc.

An Example of a customer User Center breakdown:

Prod-SecZone	(NGTP w/Premium Support)
Prod-DZ	(NGTX w/Premium Support)
Test-SecZone	(NGTP w/ standard support)
Test-DZ	(NGTX w/ standard support)
Lab	(NGTX w/software subscription)
Unused/Boneyard	(No support)

Access to User Center Accounts:
In order to be added to a User Center Account each individual must create a login user profile, provide some basic information about them and their employer. Sometimes people will have a personal login as well a corporate one. When accessing their employers User Center accounts, it is important that they use their work email address. This login profile is used for opening support tickets, managing and licensing products, searching the knowledge base, accessing CheckMates and authorizing access documents protected by Capsule Documents.

When adding users to a User Center account, you have to assign an access level, and type of contact the individual will be

There are three levels of Access to a UC:

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- Admin: Can Move & License Products and Manage / Add Users
- Licenser: Can License Products
- Viewer :   Can only View Products

Also, two types of Contacts:
- Primary: The main contact(s) within the company to receive email notifications regarding the UC Account
- Support: Allows a user to contract to contact technical support and open tickets, provided the User Center / product has a valid support contract..

Note:
- Only a limited number of Support Contacts are allowed per UC. The customer can typically open a ticket with Account Services to increase the limit.
- Support & Acct Services discourages the use of generic UC credentials

Account Managers & Security Engineers should have at Viewer rights on all of their customer UC's but ask the customer to add you or get permission to add yourself. Partners will sometimes have Viewer access to do renewals but do NOT automatically add them, again ask the customer or have the customer add them. Also, users must have already registered their email address before they can be added to a UC.

Useful Knowledgebase articles:

Accounts and Products solutions for the Check Point User Center	sk22575
How to create / join a User Center account	sk22716
Product Center FAQ	sk107375
What is a Service Contract File?	sk33089
How to Move Products from one User Center Account to Another Account	sk22435