Spider 6.4

User Guide

Legal Information

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Content

Introduction

This manual describes the work with the web frontend of Spider Asset, Licence, and Contract. The function and operation of each form will be described. Since each program of the Spider product range is customizable, this manual will describe the standard configuration. This means that various programs can appear differently in your environment as described here, due to a different configuration.

Spider Asset

Spider Asset is a system for the management of IT inventory data in a company. Inventory data describe the devices used in a company, for example: Desktop computers, laptops, servers, printers, network components, etc. also including the installed software. Spider Asset collects the available information in a database, structures the data and offers numerous view and evaluation options. With a focus on software management, Spider Asset contains the software recognition component, which on the one hand ensures the connection to inventory systems such as Microsoft SCCM, Discovery, Heat, LanDesk, etc. On the other hand, the inventory data are analyzed, classified, and automatically transferred to the asset database. Of course, you can save additional information for each asset object which is relevant for the management during the life cycle of an asset. Thus, Spider Asset is the basis for the software and license management as well as the technical support and supports the IT management in important decisions and planning processes.

Spider Licence

Spider Licence is a system used for the license management in a company. In Spider Licence, the license data are compared to the software inventory data of Spider Asset. Based on this comparison, the compliance degree on various company levels is calculated and visualized according to predefined rules for each software requiring a license. The resulting reports regarding over-licensing or under-licensing can be used for an optimum management of the existing licenses and provide the basic data for the strategic planning in a company.

Spider Contract

Spider Contract is a system for a centralized management of contracts and contract information within a company. All basic contract data and comprehensive additional information are stored in a database and will be available anytime via a comfortable web GUI for queries or structured reports. This will simplify the review of contracts, since important terms will be collated, and deadlines could be monitored precisely. Furthermore, Spider Contract offers the option to save the original documents as PDF, office, or graphics file together with the related contracts.

If you have further technical questions, we would like to recommend our web site **www.brainwaregroup.com http://www.brainwaregroup.com.** Here you can find all documents, a knowledge base as well as a support form if you have questions for our specialists. You can access the mentioned help pages also via the **Backstage** (on page 35), under **Info**.

0.1 About the manual

0.1.1 Information about the Spider 6.4 manual – March 2023

With the H1 2023 version of the Spider 6.4 manual, the manual has been extensively revised.

The following chapters have been completely revised and/or rewritten:

- Chapter 0
- Chapter 1.2 Structure of the home page
- Chapter 1.6 Search forms
- Chapter 2.5 Software Services
- Chapter 2.8 License metrics procedures (LMP)
- Chapter 3.2 License management
- Chapter 3.8 Article
- Chapter 5.3 Reminder
- Chapter 8.4 Profiles

The following chapters were added:

- Chapter 1.5 Index-based search
- Chapter 2.1.8 Employee View
- Chapter 2.5 Software Services
- Chapter 2.7 Oracle products
- Chapter 3.4.3 SAM Priorities
- Chapter 3.5.4 SKU-Catalogue

The following chapters were removed:

- Chapter 1.5 One Search indexed search
- Chapter 3.10 Oracle Inventory

0.1.2 Information about the Spider 6.4 manual - December 2019

With the December 2019 version of the Spider 6.4 manual, the entire book has been revised.

The following chapters have been completely revised and rewritten:

- Chapter 1.6 Search Forms
- Chapter 2.5 Software Services
- Chapter 6.1 Reports

The following chapters have been added:

- Chapter 2.7.2 LMP problems
- Chapter 3.2.3 SKU-based import
- Chapter 3.8 Articles
- Chapter 8.1.5 Profiles tab
- Chapter 8.5 User profiles

The following chapters have been removed:

- The chapter “Diagrams” from earlier manuals has been omitted.

0.2 What is new in 6.4.8

The following functions are new in 6.4.8:

Modul	Function	Description
Licence	License allocations	Previously it was possible to maintain multiple license allocations for a single legal entity under one license. This is now prevented. Existing allocations will be migrated to the latest license allocation. Furthermore, the bulk import for license allocations has been integrated.
Core	Employee	The page for selecting software products (select standard) has been revised for improved usability. Now the page accepts multiple search filters and grouping of the search result has been enabled.
Common	Index-based search	A new cross-module search option has been introduced and replaces One Search. See chapter "Index-based search" on page 39.
	Accessibility	Keyboard navigations in table views has been revised. Paging and sorting using the keyboard have been improved.

0.3 What is new in 6.4.7

The following functions are new in 6.4.7:

Module	Function	Description
Asset	Software Services	Introduction of trends for Cloud subscriptions.
Core	Employee	Employees can now be assigned to a legal entity
Common	Info	Update of browser recommendations
	User Interface	The accessibility of the user interface has been improved.

0.4 What is new in 6.4.6

The following functions are new in 6.4.6:

Module	Function	Description
Asset	Asset	A message no longer appears when the type of asset is changed in the user interface.
Common	Info	Individual pages now show a hyperlink that leads to further information in the Flexera community.
	Search	The date filter allows searching for a specific day.
	Resubmissions	Resubmissions can now be defined recurring.
	User Interface	The accessibility of the user interface has been improved.

0.5 What is new in 6.4.5

The following functions are new in 6.4.5:

Module	Function	Description
Asset	Software Services	The page for displaying recognized products on an asset has been revised. Multiple filters and groupings have been made possible. The manufacturer and flag (of the recognized product) columns enable new categorizations.
		Functions like software detection can now be triggered via **Info and Settings**, and the export of unknown software products as .swrd-file can be initialized.
		Introducing Trends for installations.
		Introducing custom coverage rules that can be used to create suites and bundles.
	Employee view	Display of the synchronization status of the Recognition module.
	Oracle	GLAS-files can be downloaded
Licence	Licence search	The filter "Do not consider in article clearing" is introduced
	Licence	Subscriptions in contrast to licenses with maintenance can be created.
Common	ESI	Recommendation to not use ESI anymore.

0.6 What is new in 6.4.4

The following functions are new in 6.4.4:

Module	Function	Description
Asset	Asset	A main user is now automatically assigned to an Asset.
	Import priority	Connectors can now be assigned an import priority.
Licence	Artikel catalogue	Some article categories and License programs can now be ignored by the article catalogue.
		Articles now provide information about the quantity per unit.
		Connected Licenses and maintenances, which share the same SKU may now be handled together

0.7 What is new in 6.4.3

The following functions are new in 6.4.3:

Module	Function	Description
Core	AD Employee synchronization	Employes with a defined „valid until” date will switch to an inactive state even if the Employee is still reported by the AD Connector.
Asset	Account (Cloud)	The result list is no longer limited to 500 entries.
Licence	Oracle Seiten	The following Oracle pages have been added: - License-Scope - Oracle databases - Oracle dashboard

Module	Function	Description
	SAM-Priority filter	Manufacturer search filter now supports SAM Priorities.
Contract	Year on the volume licensing agreement	The volume license agreement gets the Anniversary field. This is automatically one year after the start date or, if earlier, on the end date.

0.8 What is new in 6.4.2

The following functions are new in 6.4.2:

Module	Function	Description
Licence	Article	For licenses and maintenance that are linked to an article from the article catalog, the user interface displays an information area with fields from the article.
	Creation of Licenses and Maintenances	If an article from the catalog is selected when creating a license or maintenance, it can now be filtered by the license program.
	Article Catalog	The article catalog has been enhanced with the following information: Platform (OS platform of the article), ECCN (Export Control Classification Number), RRP (Recommended Retail Price).

0.9 What is new in 6.4.1

The following functions are new in 6.4.1:

Module	Function	Description
General	Important innovations for SAM	With the new contract type “Volume Licensing Contract” extensive new SAM functions are introduced. The update adds this contract type in general, even for customers without a full update edition and must be authorized on those installations if required.
		A new report shows Oracle Java SE versions installed on clients and servers.
		For a consistent and easy processing of OEM licenses, the following functions have been added: When importing OEM licenses, the serial number of the computer system can be specified.
		Spider has been extended for automated processing of consumed applications to Remote Desktop Services (Terminal Server, Citrix).
	Search	In the new object searches introduced with Spider 6.4, you can now also search for results that are not equal to the filter value.
		With Spider 6.4.1, a button for easy reset of the set filters is again introduced on search pages.
	Document upload	With Spider 6.4.1 the upload function for documents will be renewed.

Module	Function	Description
Software Services	LMP	In the future, content additions to the license metric procedures will be delivered via the Software Services.
	AD Groups	The "AD Groups" section has been removed from the Software Services results pages and added to the main menu as a stand-alone menu item.
Licence	Derived catalog articles	It is now possible to derive a new article from an existing catalog article.
	Software assignments	License without Legal Entity can now also be allocated to cover Employee software assignments.
Asset	Search	The employee display form (Employee View) now also supports the new search technology introduced with Spider 6.4.
API	Concurrency	The Spider Web API now better supports concurrent access to objects.

0.10 What is new in 6.4.0

The following functions are new in 6.4:

Module	Function	Description
General	New search functions	The search functions in Spider 6.4 have been completely redesigned. A new and innovative user interface concept now also allows a freely selectable combination of different filters in property searches. The biggest change, however, is that from now on both search pages and in reports multiple nested groupings are possible. In addition, you can switch from the results display to a chart view with drill-down features.
	GDPR compliance	To comply with the provisions of the European General Data Protection Regulation (GDPR), various adjustments were made to Spider. Since the GDPR demands data minimization and stipulates that personal data may be stored only if they serve a specific operational benefit, Spider's standard configuration has been revised and unnecessary fields have been removed. In addition, a data deletion mechanism has been implemented to automatically clean the "RecycleBin" tables in each Spider database.
		The GDPR also stipulates that persons must be given information about the data stored about them on request. Spider users can call up a self-assessment. Information can also be generated for employees who are not Spider users.
		Also new is the imprint, which can be customized. Likewise, a cookie notice, and a privacy policy can be deposited. Both the Cookie Notice and the Privacy Policy must then be approved to use Spider.

Module	Function	Description
	Web API	As of Spider 6.4, a REST standard-based programming interface - Spider Web API - is provided. On the one hand, it serves the better integration of Spider and Columbus products among each other, but on the other hand, above all, the integration of Spider with existing customer and third-party systems.
		The Spider Web API allows you to perform search queries, request reports, and create, modify, assign, detach, and delete objects. The Spider Web API is an integral part of Spider 6.4 and is immediately available after installation.
		The Spider Web API has its own documentation section with information about all features, their parameters, and return values. For testing and development purposes, the Spider Web API Explorer is available. This makes it easy to get started with the use of the interface and to facilitate the analysis of possible errors. For in-depth development work, such as the construction of new interfaces, Swagger is available.
	Authorization concept	For Spider 6.4, the authorization concept has been extended. Previously, users had to be assigned the permissions separately for each application. There were no cross-application roles. This gap is now closed by the introduction of profiles. A profile bundles multiple application roles, allowing you to centrally manage and assign all permissions required for a specific role.
		Among other things, this enables the tasks of the system administrator and the user administrator to be separated. The system administrator defines the roles and authorizations and combines them into profiles. The user administrator can assign the profiles to the users and does not need to have in-depth knowledge of the system.
		Profiles do not replace roles, but only summarize them. Form permissions are still assigned to roles. Business units can be given either roles or profiles.
Licence	Catalogs	Spider 6.4 eliminates monthly updates to the software catalog. The catalog contents will be delivered and installed in the future with the Recognition module. Thus, the monthly execution of an additional setup can be eliminated. The prerequisite for this is the Recognition module with version 1.1805.2.

0.11 What is new in 6.3.4

The following functions are new in 6.3.4:

Module	Function	Description
General		Version 6.3.4 includes a complete redesign of the inventoried programs.
Asset	Software Services	The aggregation of the inventory data, considering the normalization algorithms for programs and manufacturers, offers a significant improvement over the previous versions.

Module	Function	Description
		The extensive normalization of the manufacturer's notation makes the processing and evaluation of the programs much more efficient.
		Extended views of the inventory data lead to greater transparency.
	License Metric Procedures	With 6.3.4 there are considerably more LMPs available.
		Any problems that occurred during the calculation are already shown in the LMP overview.
	Asset status	Assets that are no longer delivered via software services are automatically set to inactive.
Licence	Compliance	The content of many forms has been enriched with important key data such as: license balance, license requirements, license inventory and compliance.
		Compliance pages have been revised so that clearer statements can be made.

0.12 What is new in 6.3.3

The following functions are new in 6.3.3:

Module	Function	Description
General	Reporting	Predefined reports on Oracle licensing, the System Center and SAM Workspace are now also available.
		As of 6.3.3, standard reports are included in the license requirement calculation folder, which contribute significantly to LMP transparency (the function is not downwardly compatible).
	Delete mandator function	Deleting mandators is possible from version 6.3.3. Applies to: SAM Cloud & Enterprise Edition
Asset	Recognition info	Detailed information on the scan data and their synchronization can now be called up on the asset object.
	Manage device	This new function can e.g., Inventory data such as file or software scans can be deleted.
	Spider Incident Integration	In Spider Asset, the ticket summary is displayed on the asset and on the employee when the Spider Incident System is connected.
Licence	Improved Oracle integration	Connection of Oracle products to the product catalog.
	Oracle compliance	License demand is considered in compliance calculation.

0.13 What is new in 6.3

The following functions are new in 6.3:

Module	Function	Description
General	Modern design	A new modern web design was applied to the user interface. This is a comprehensive re-design of the complete Spider suite which is intended to improve the operation.
	Indexing	With Spider 6.3, the integration among the Spider products has been improved considerably, since the individual modules are better interconnected via the indexing technology.
	ONE Search function	The One Search Function allows for a quicker search across several Brainware products. If a customer has also installed the Spider Incident product, you can search for the related tickets directly from Spider Asset.
Asset	Enhancements for the License metrics procedures	A new license metrics procedure named "Specific Microsoft Remote Use" is now available for the calculation of the corrected license requirement due to the Microsoft Remote usage.
		The license metrics procedure for the calculation of the Microsoft BizTalk server has been enhanced by the software assurance version.
		The license metrics procedure for the identification of Microsoft installations not creating a license requirement (MSDN) has been revised completely.
	Oracle Database Suite	The Oracle Database calculates the license demand based on the inventoried Oracle products and the Oracle licensing rules.
License	Oracle license scope	The license scope includes the Oracle databases which belong together regarding their licenses, the license-relevant options and management packs as well as the underlying physical and virtual systems.
	Article change wizard	The article change wizard allows you to modify the assignment of a maintenance to an article. All relevant information is taken over from the article into the maintenance.
	History analysis	The compliance pages of product and product version have been enhanced by a history analysis.

0.14 What is new in 6.2

The following functions are new in 6.2:

Module	Function	Description
General	Global filters	Global filters allow for individual filtering by manufacturer as well as by legal entity. Global filters are used in the search forms and in the dashboards.
	Simplification of the search	The partially qualified search or filtering will work without entering a *.
	Mass processing	Functions for mass changes and mass import
	Hierarchy selection	The selection for object fields with hierarchical structure, e.g., location, has been simplified.
	Screen resolution	High-resolution monitors are supported.
Asset	Create asset	As a new feature, a function unit will be created simultaneously with the creation of an asset, and the asset will be assigned to this function unit. This enhancement supports the recognition synchronization for virtual systems as well as employee assignments.
	Recognition functions	Import of virtualization data from VMWare, vCenter. Improved support for user-based metrics.
	Recognition settings	Improvements due to the enhanced filtering options as well as the controlled selection from the product catalog.
	Direct assignment	By directly assigning a software to a recognition result, the software to be used for detected product can be determined.
License	Subdividing a license	You can use this function to subdivide an existing volume license into two smaller volume licenses. For example, if the maintenance contract does not cover the whole volume.
	Improved SAM processes	The creation of licenses and maintenances has been completely revised. The maintenance has been redesigned. As a new feature, the maintenance can now also be created using the article catalog.
	Compliance view	The compliance view has been revised completely, and the SAM wording has been unified. Evaluable key figures will be presented in a logical and easy to understand way. Also, the trend charts for showing a development are a new feature.

From Spider 6.2.16021

Module	Function	Description
Asset	Determine deviating software at the asset	You have the possibility to make a deviating software assignment to an asset.
	Global ignoring of the recogni-tion result	You have the possibility to ignore a product if you do not want to view or process this product in Spider.
	Status of the SDC connection	As from version 6.2.16021, the SDC connection will be monitored.

CHAPTER 1

Basics

All Spider applications are operated via a web browser. The following browsers are supported:

- Internet Explorer 10 and higher
- Microsoft Edge
- Mozilla Firefox from version 38 (ESR)
- Chrome from version 46

The web front end is your central point where you can configure all settings and request all data. Spider can be customized to the requirements of your company.

In the following chapters, the usage of the forms and the related data is explained in detail. We suppose that you have the permission to edit all main objects of Spider Enterprise.

Terms such as "select", "click", etc. refer to a single click of the left mouse button. "Buttons" and "icons" represent buttons, images, or symbols which you can click to open a form.

This manual uses various formats to highlight certain terms and actions. Specific notes and tips are shown with a different background color, according to their importance.

Format	Description
Bold font	Elements in the software or in the operating system, such as menu items, buttons, or elements of a selection list
Italic font	Emphases (important details) and links to other chapters or documents
Triangle symbol "➢"	Instruction step
Angle bracket ">"	Command menu sequences, e.g., **File** > **Open**
`System font`	Directories, code, and script samples
CAPITAL LETTERS	Key names, e.g., SHIFT, CTRL, or ALT
KEY+KEY	Key combinations, i.e., the user must hold one key and press another simultaneously, e.g., CTRL+P or ALT+F4.

Note	Used for notes or tips which facilitate the work or for additional information which enhances understanding for the product.

Important	Information which *should* be observed by the user, because otherwise *problems* or *additional work* may be caused in operation.

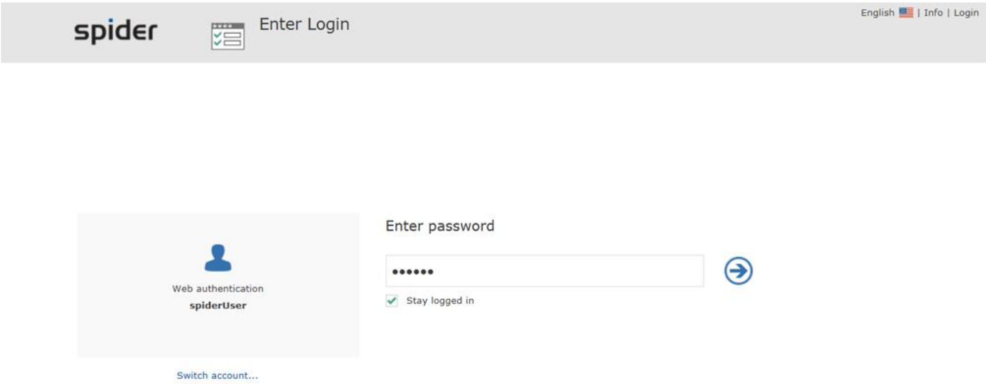
Attention	Information which *should* be observed by the user to prevent *malfunctions of the system* (crashes, data loss, system failure).

1.1 Login

Start Spider by entering the address of the server, on which Spider is installed, into the browser.

To work with Spider, you must log in. You have two options:

1. You are registered in the Active Directory and have access rights as a Spider user. In this case, you will log in **automatically** (see "**Active Directory Login**" on page 23) regarding the Single Sign-on.
2. You do not meet the conditions acc. to point 1 but are registered in Spider as a user. Then, you can log in via the web authentication.



- To select your personal account during the web authentication, click on the link **Change account....**.
- Enter your password.
- Activate the check box *Stay logged in* to prevent displaying the session end dialog.
- When you click on the arrow button, you will be taken to the home page of Spider.

Note	If this is a multi-mandator system, you must select the mandator in the next step.

Session end dialog

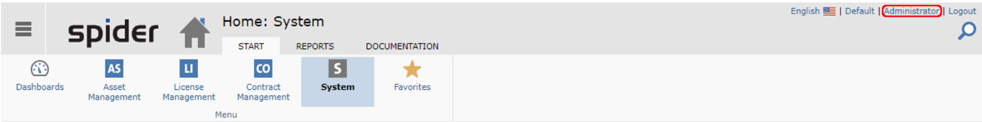
Login mode	Description
Standard login	Applies if the user directly logs in to Spider and the check box *Stay logged in* is not activated.
	3 minutes before the session ends, the user will be notified of the coming session end. The presumed expiration time is shown incl. date.
	The first dialog provides the option to either extend the session or to log in again. Click on one of the following buttons: **Update** or **Login**.
	If the session has expired, the user can only log in again. Data which had not yet been saved are lost.
Permanent Login	Applies if this is a Windows login or if the check box *Stay logged in* has been activated in the login process.
	The session will be automatically extended.

1.1.1 Active Directory Login

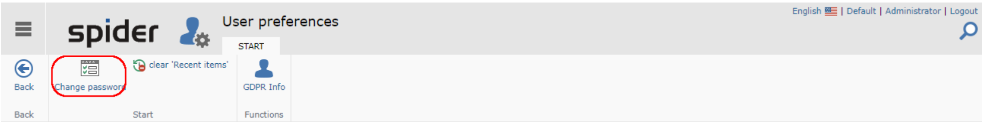
If your company uses the Active Directory service (short: AD) and if you are registered there for the usage of Spider, you will be logged in directly, without having to enter your login data. Spider detects that you are a registered user of the network and accepts this information for the Spider login. If you have logged out in the meantime, you may login directly using the **Use Windows Session credentials** button, without having to specify login and password.

1.1.2 Change password

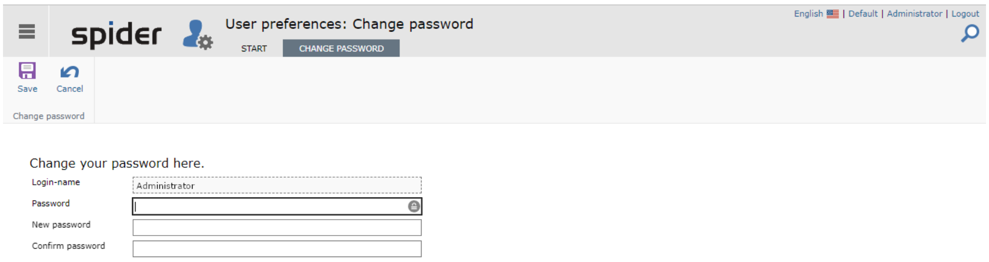
If you are not logged in via the Active Directory, the password can be changed as follows:



➢ Click on the name of the logged in user in the upper right corner to open the form **User preferences**.



➢ In the form **User preferences** click on the **Change password** button.

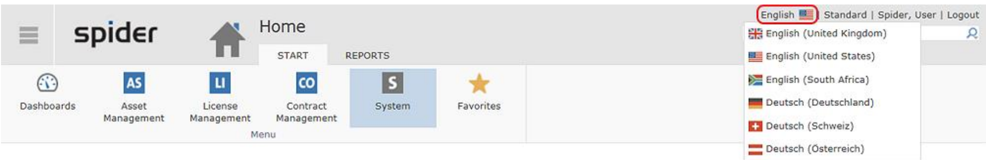


➢ In the **Change password** form, enter your current as well as your new password in the corresponding fields. In the last field you must repeat the input of the new password.

➢ Finally, click on the **Save** button to accept the changes or on the **Cancel** button to abort the process.

1.1.3 Change language

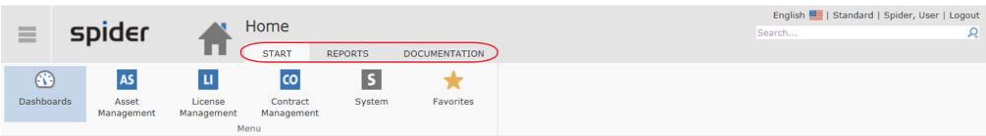
On each page you can change the language in the upper right corner.



The available languages are determined by the system configuration.

1.2 Structure of the home page

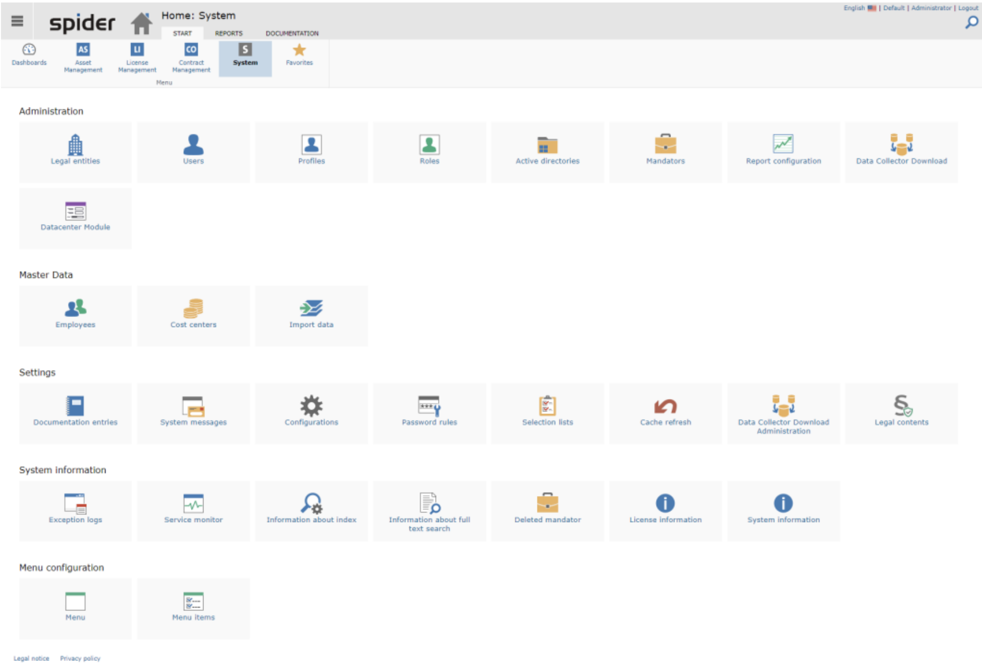
After a successful login the Spider **Home page** is opened. The system is operated mainly and centrally via a **Ribbon**. The home page ribbon offers the ribbons **Start** and **Reports**.



- **Start** shows the menu which can be used to call up functions of the installed Spider products.
- Click on **Reports** to get to the **Report center** which offers various reports and query functions.
- Under the ribbon **Documentation** you can find the uploaded documents, e.g., the user manual.

The ribbon group **Menu** of the home page will take you to the various topics. The menu items shown here depend on the installation and configuration of your system.

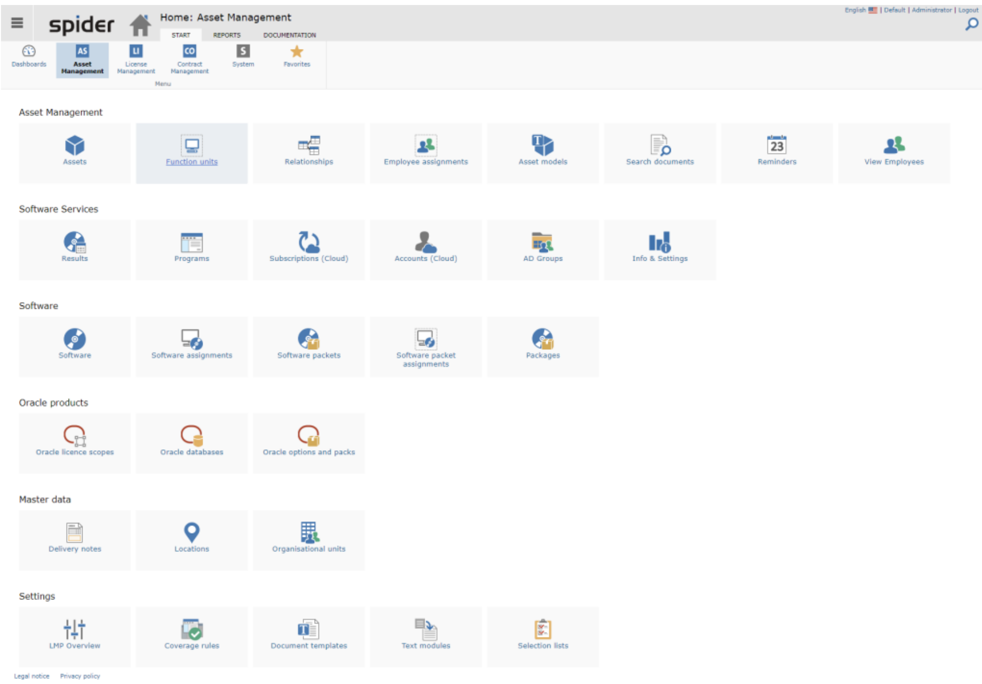
By selecting a menu, the menu items are shown grouped by **menu sections**.



➢ Click on the **Spider logo** to return at any time to the main page.

1.2.1 Spider Asset home page

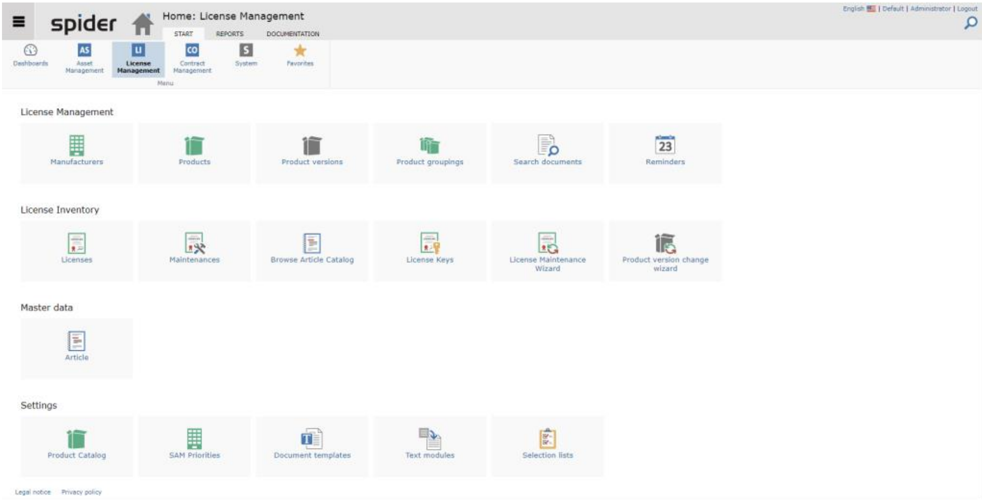
The Spider Asset home page is divided into the following menu areas: **Asset Management**, **Software Services, Software, Oracle products**, **Master Data** and **Settings**.



Depending on your permissions, you can navigate from the menu area Asset Management to the search forms of asset, function units, etc. where you can call more functions such as creating a new asset. Similarly, also the menu items of the other menu sections lead to the corresponding search forms and to the related functions.

1.2.2 Spider Licence home page

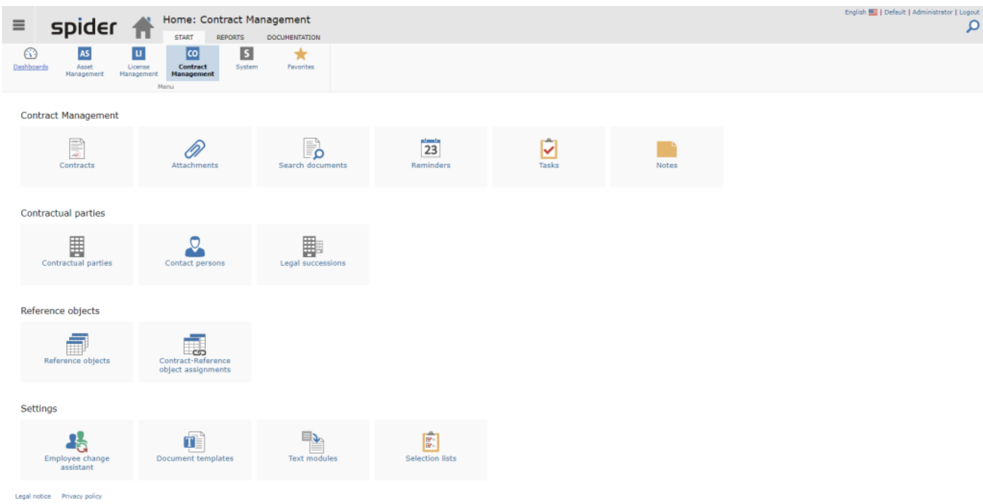
The Spider Licence home page is divided in the following menu sections: **License management**, **License inventory, Master data**, and **Settings**.



Use the menu section **License management** to navigate to the search forms of the manufacturers, products, product versions, etc. where you can call further functions such as e.g., adding a new manufacturer. Similarly, also the menu items of the other menu sections lead to the corresponding search forms and to the related functions.

1.2.3 Spider Contract home page

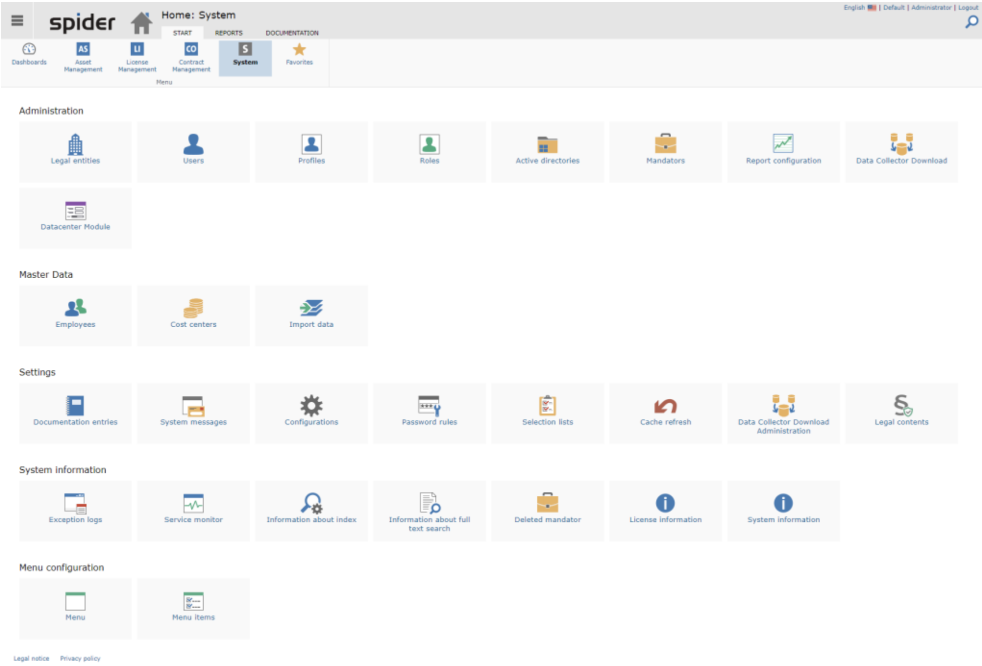
The Spider Contract home page is divided into the following menu sections: **Contract management**, **Contractual parties**, Reference **objects** and **Settings**.



Depending on your permissions, you can open the search forms Contract, Attachment, Invoices, Documents, Reminder, Tasks and Notes from the menu section **Contract management**. From the menu section **Contractual parties**, you can navigate to the search forms for contractual parties, contact person and to the Legal succession function. Accordingly, the menu items of the **Settings** area will lead you to the related search forms and functions.

1.2.4 System

Use the **System** menu for customizations in the areas **Administration**, **Master data**, **Settings,** and **Menu configuration**.



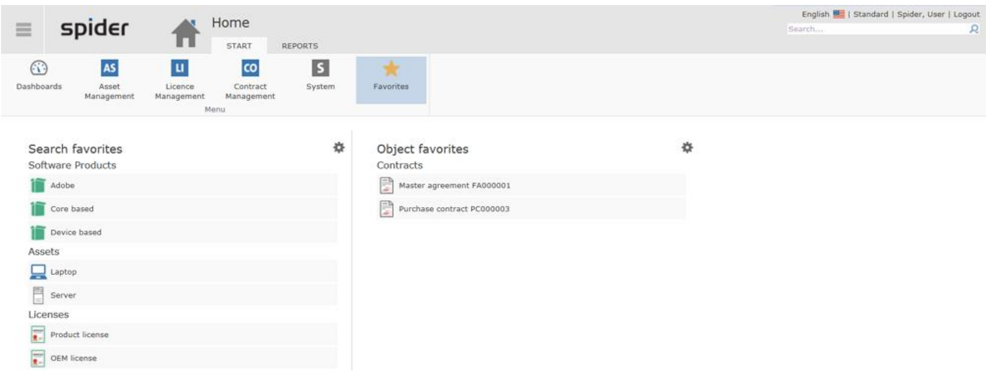
Detailed information (see "**Master Data**" on page 312)

1.2.5 Favorites

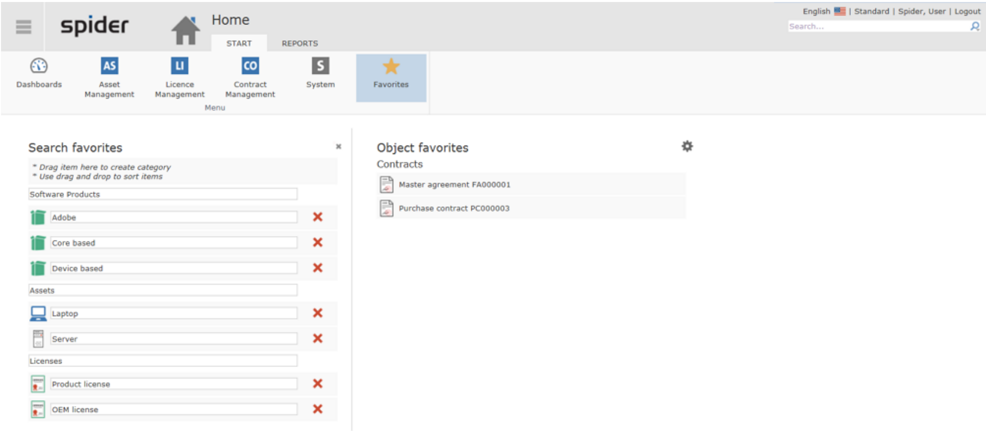
Favorites allow you the cross-product access to objects and searches if they have been previously added to the favorites. Favorites can be divided into categories and moved per drag and drop.

➢ In the menu of the Spider home page or in the Backstage (on page 35) click on **Favorites**.

You see the **Search favorites** on the left and the **Object favorites** on the right side.

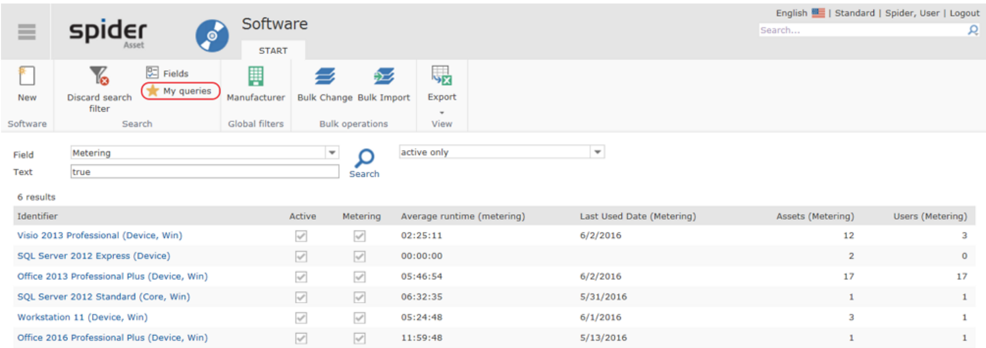


- Select a category and click on the symbol (Edit).

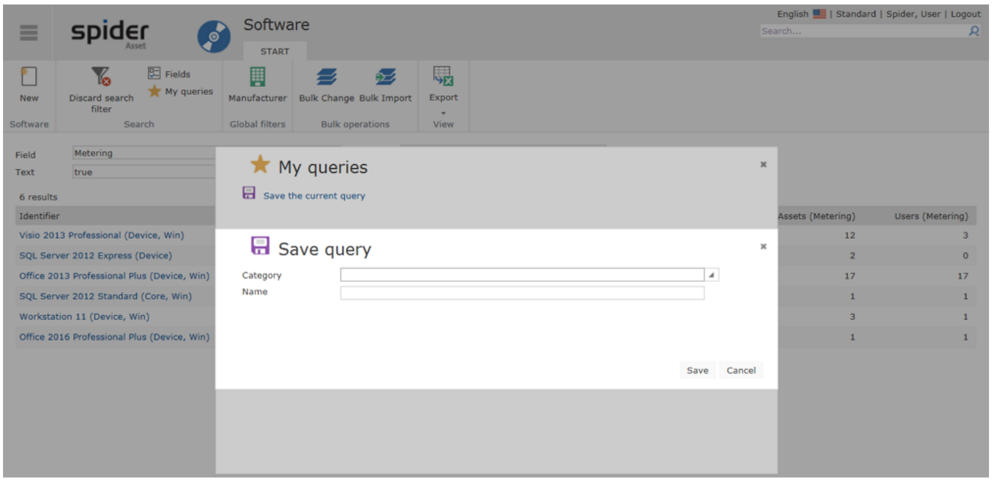


- To change the order of the favorites, sort your entries per drag and drop.
- To add a new category, drag an entry to the gray note field and enter the name of the new cate-gory.
- To delete entries, click on the **red cross** and confirm the security message with another click on the **red cross**.

To add new entries to the favorites, you must call the corresponding object or search.



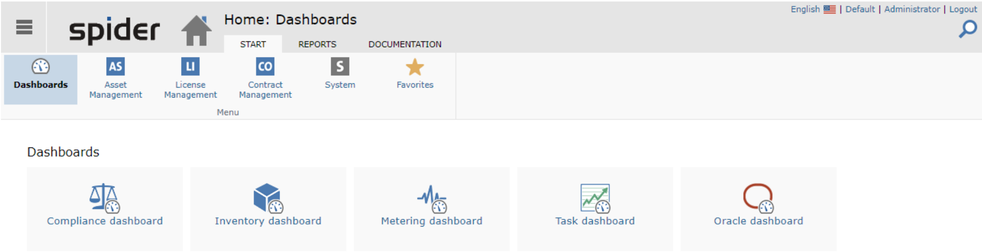
- Within the object or the search, click on the ribbon button **my queries**.
- Click on the Link **Save the current query.**



- Select a category or add a new category by entering a new category name.
- Enter the name of the favorite and confirm by clicking on **Save** or **Cancel**.

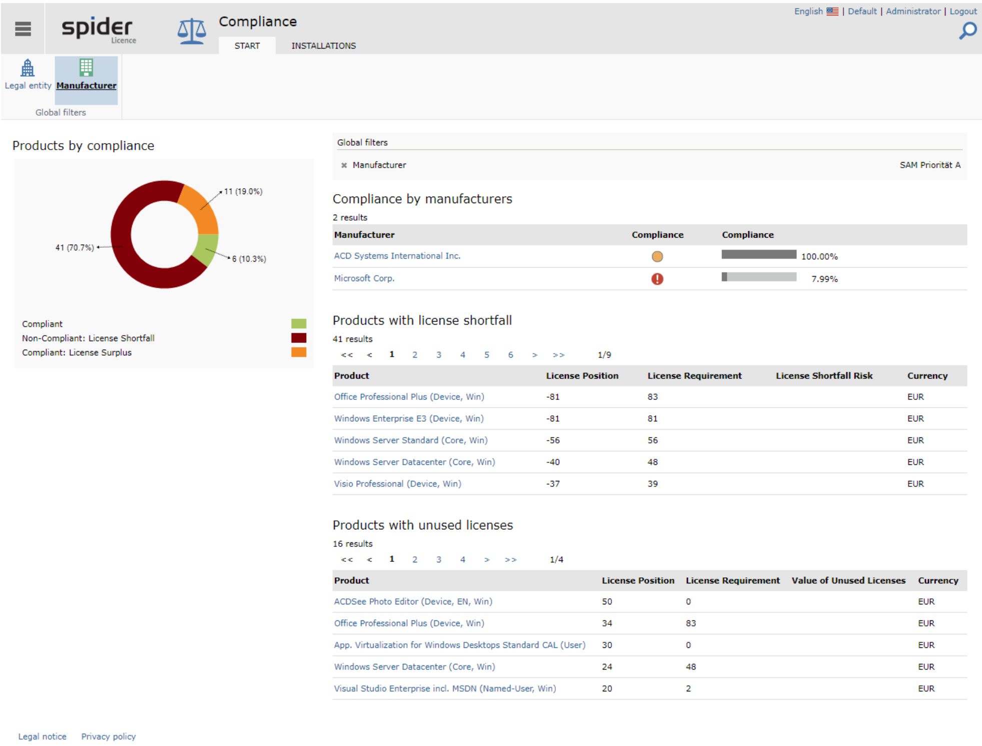
1.2.6 Dashboards

The dashboards contain key data from various Spider modules in a clearly arranged layout. The selection of dashboards included in the delivery scope depends on the licensed modules. The following dashboards are e.g., delivered with Spider Asset and Licence:



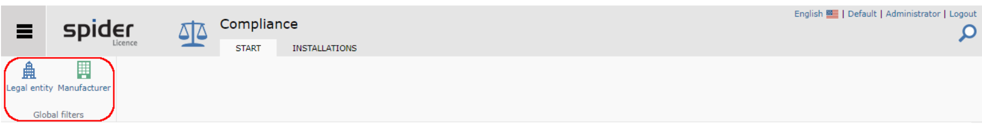
Compliance dashboard

The Compliance dashboard shows the current compliance degree of all entered manufacturers as well as the compliance history of the last 6 months.



Global filters

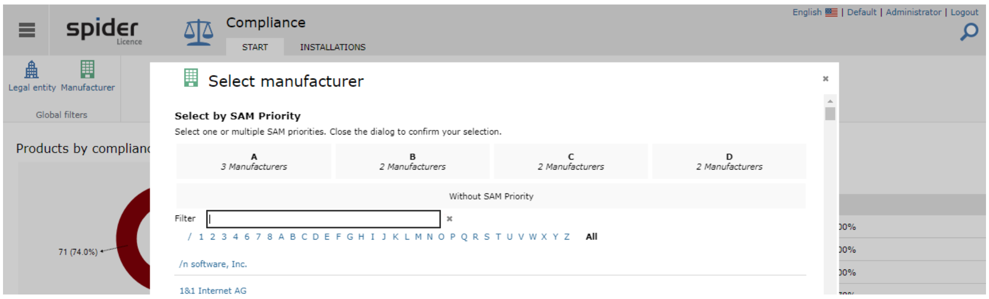
The functions in the *Global filters* ribbon group allow for individual filtering by **Manufacturer** as well as by **Legal entity**.



Note	Global filters are used in the search forms and in the dashboards. These filters are persistent, i.e., the setting remain active when going to another web site.

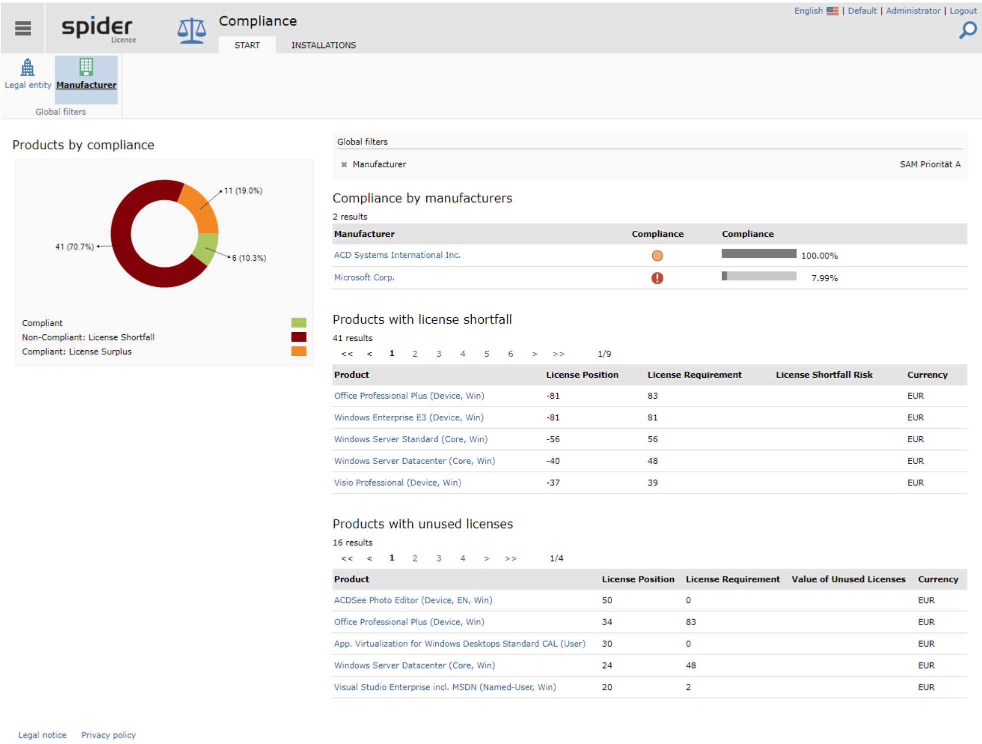
Filter	Description
Select manufacturer	The indicated result refers to the selected manufacturer or SAM Priority only.
Filter legal entity	The indicated result refers only to the selected legal entity.
Include subordinated legal entities	By ticking the check box *Include subordinated legal entities*, these legal entities are also indicated.

➢ Click on the **Select manufacturer** ribbon button if you want to see the key data for one manufacturer only.

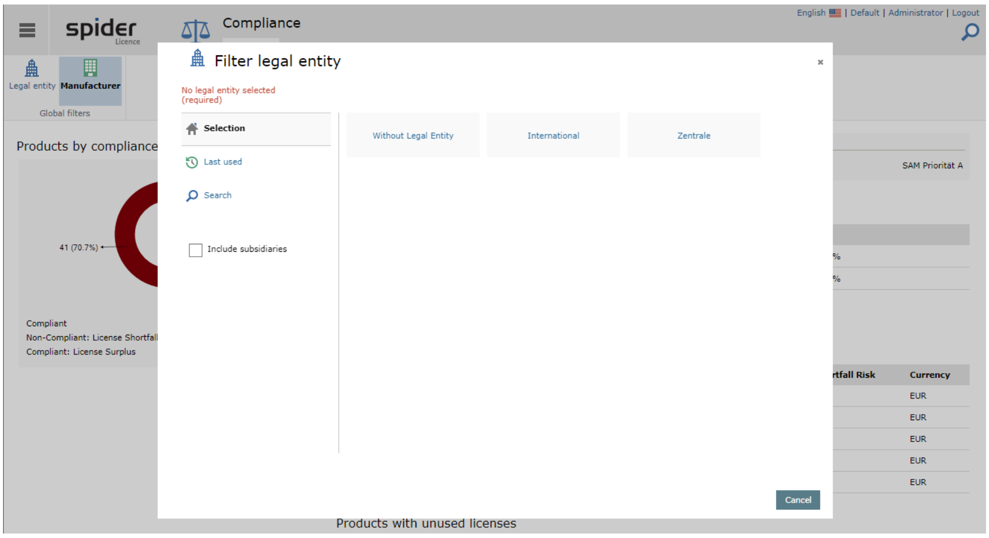


By entering a filter criterion, the selection is reduced dynamically. A SAM Priority can also be selected. To do this, select a tile and close the dialog via the X.

➢ Select the manufacturer, the key data of which you want to see.



Click on the ribbon button **Filter legal entity** if you want to see the key data for one legal entity only.

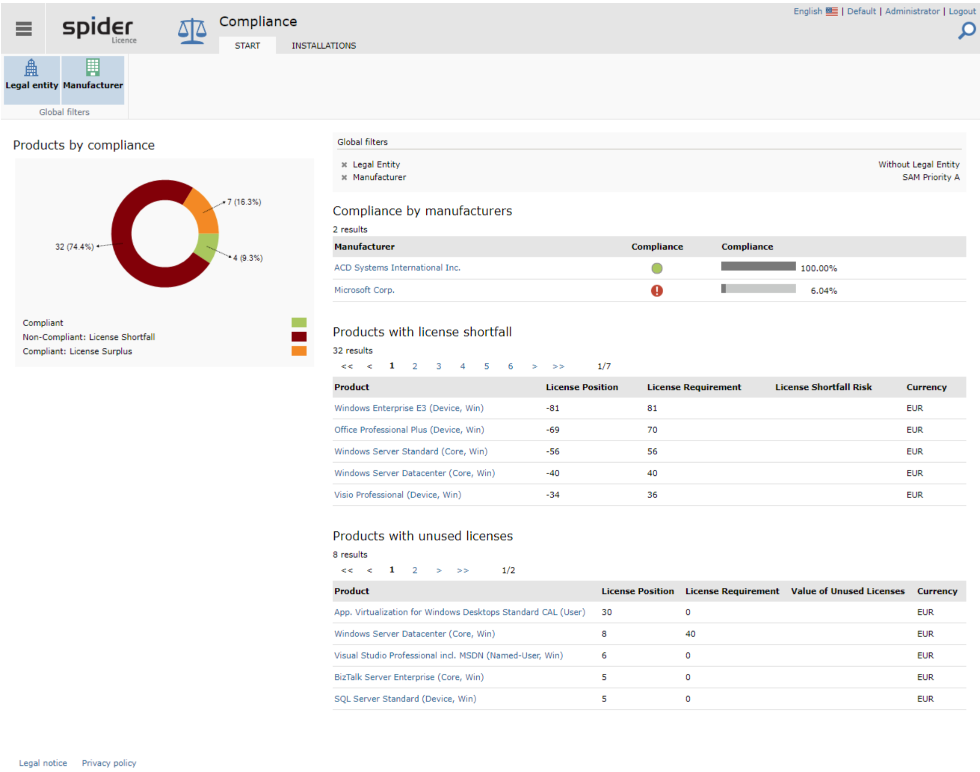


Note	If you want to display elements without a legal entity, select the **Without Legal Entity** tile. No other legal entity is ever subordinate to this legal entity.

➢ By ticking the check box *Include inferior legal entities* you have the option to include these data into the view.

Important	All Legal Entities are displayed. But you can choose only one of them if the user is authorized to use it. If this is the case, the dialog also shows the **Apply** button.

In the following example, the manufacturer filter has been set to *SAM Priority A.* and the legal entity filter to *Without Legal Entity.*

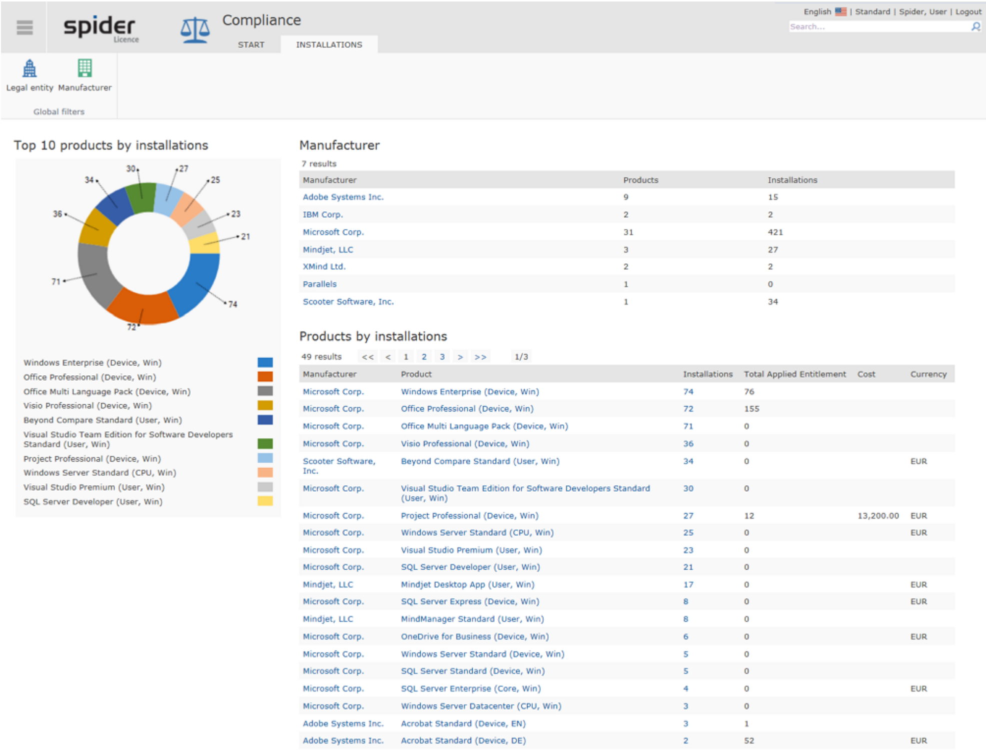


If global filter criteria are used, they will be shown in the *Global filters* field.

➢ By clicking on the **cross**, you can reset a selected filter.

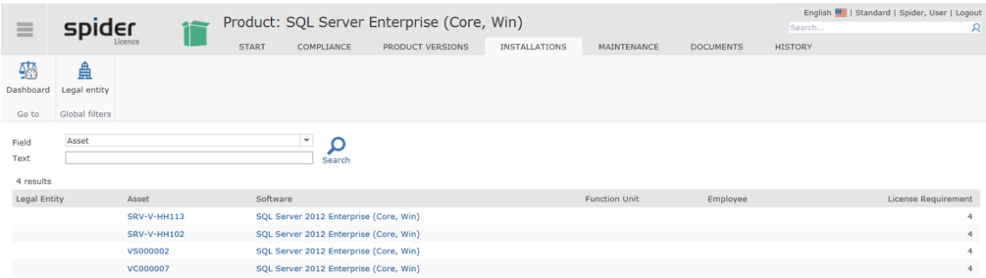
Installations ribbon

The **Installations** ribbon shows the Top 10 of installed products.



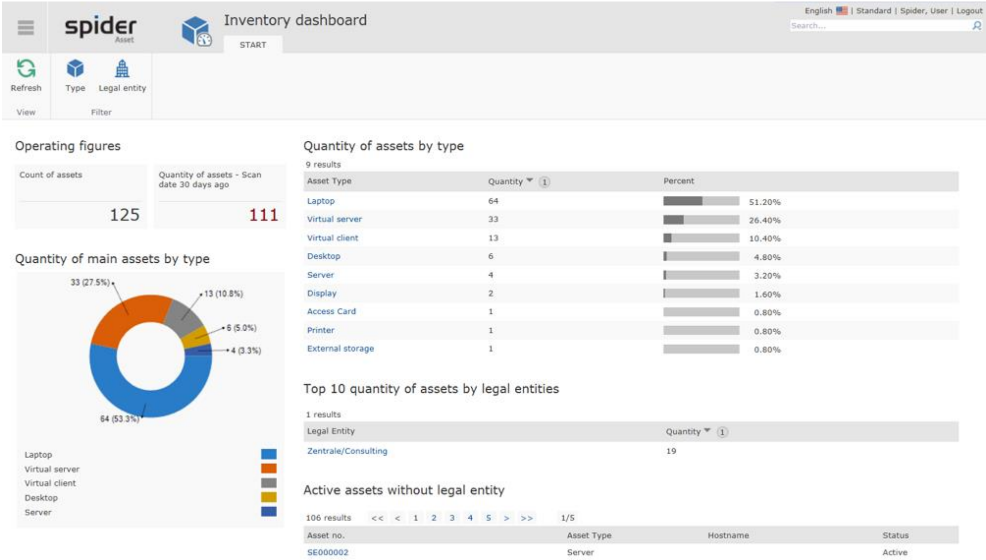
Via the links in the columns *Manufacturer*, *Product,* or *Installations*, you can go to the corresponding areas.

➢ If you click on the **number** in the *Installations* column, you will receive a list of all assets on which the corresponding product is installed.



Use the links in the Asset column to go to the asset objects.

Inventory dashboard



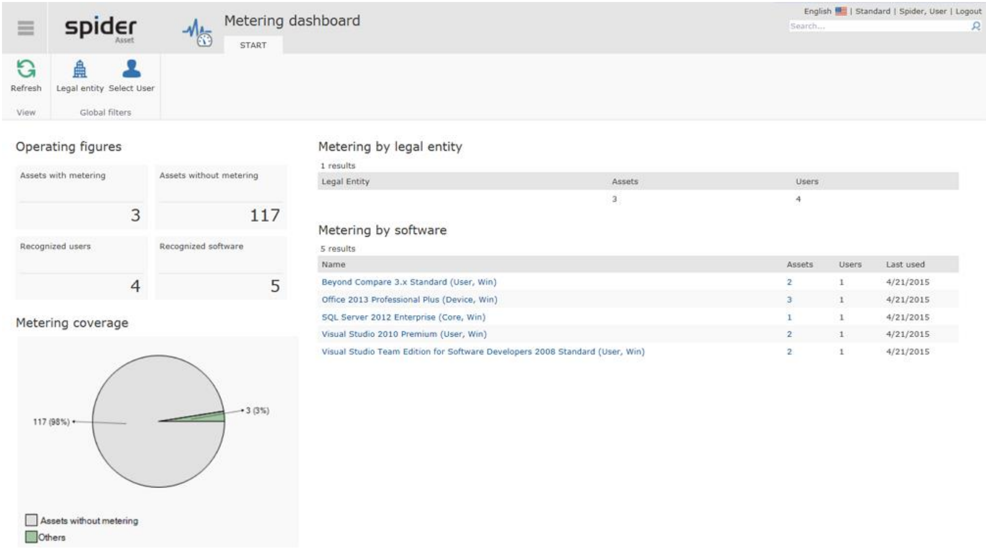
➢ If you want to apply a filter, click on **Type** or **Legal entity** in the *Filters* ribbon group. The filter options are like those of the compliance or license inventory dashboard.

If global filter criteria are used, they will be shown in the *Global filters* field.

➢ By clicking on the **cross**, you can reset a selected filter.

Metering dashboard

The metering dashboard shows how many assets have available metering data and for which software on these assets it is possible to create metering evaluations.



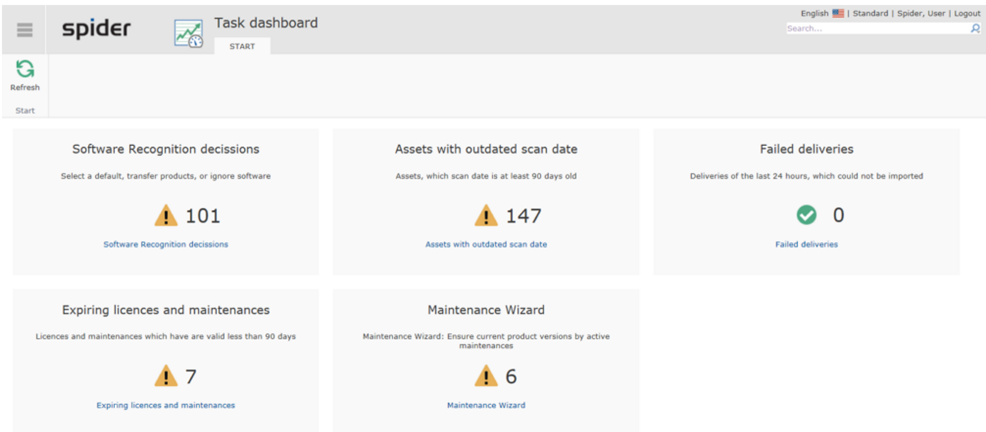
Note	The metering key numbers can be filtered by **Legal entities** or **Users**. To do this, use the functions in the *Global filters* ribbon group.

If global filter criteria are used, they will be shown in the *Global filters* field.

➢ By clicking on the **cross**, you can reset a selected filter.

Task dashboard

The Task dashboard helps to implement an efficient system maintenance by clearly identifying the areas which need action.



Tiles with a yellow warning triangle will need action.

➢ By clicking on the corresponding tile, the system will take you to the area which has to be checked and taken care of.

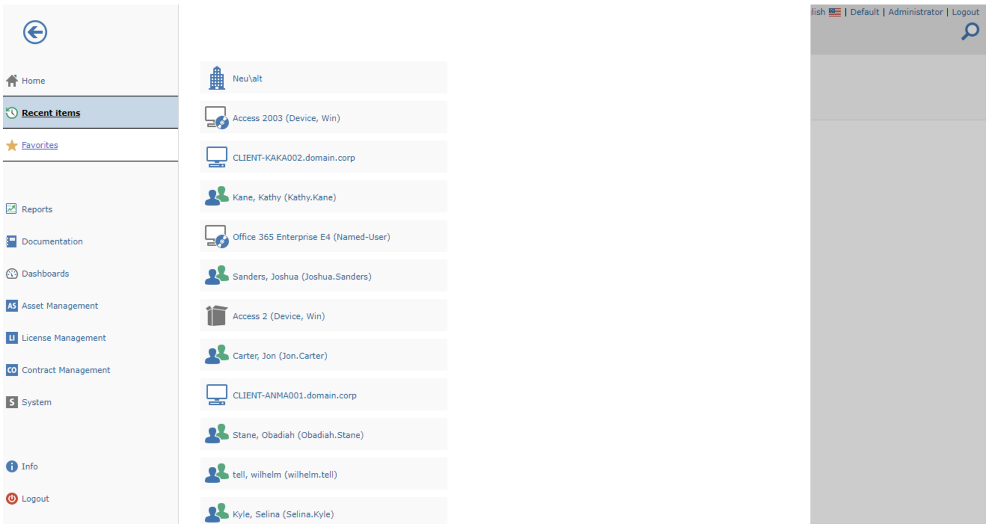
Oracle dashboard

Since the Oracle licensing is based on a relatively complex licensing model, these relations will be **described** (see "**Oracle** " on page 132) in a separate section.

1.3 Backstage

The backstage is always available and allows for a quick navigation.

➢ By clicking on the ▫ in the upper left corner, you will be taken to the backstage regardless of where you are now.



Recent items show the list of the recently uses object accesses. These will be saved in the system. Since during your work with Spider, you will have to call many objects, this function will help you to have access to the recently viewed objects.

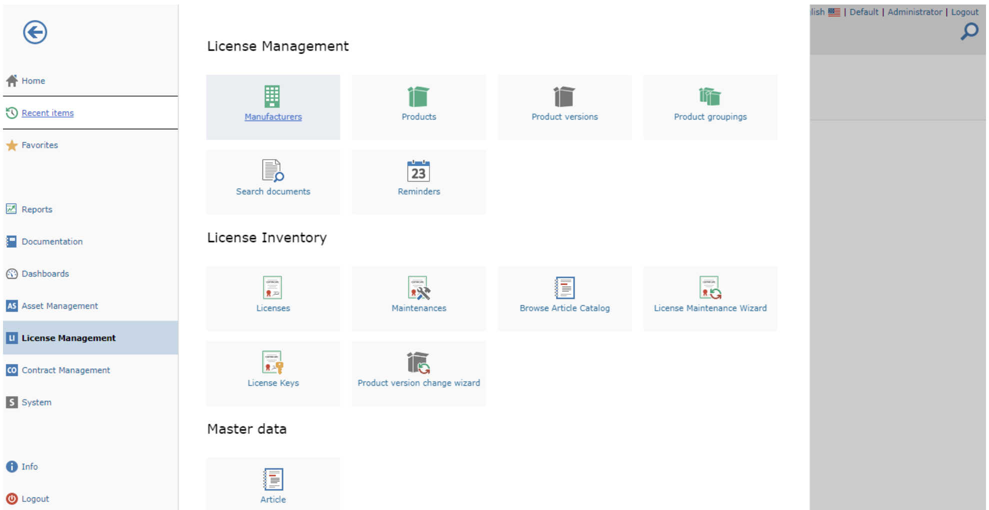
Via **Home page** (see "**Structure of the home page**" on page 24), you will navigate directly to the home page.

Use the **Favorites** (on page 27) to view or manage your favorites. The Favorites home page will open. Favorites will allow you to have quicker access to favored search queries, reports, or objects.

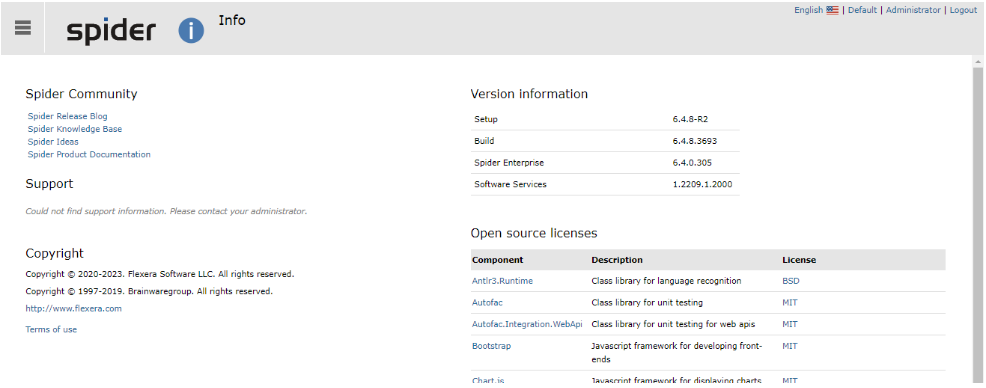
You will reach the report center by clicking on **Reports** (on page 297).

The uploaded documentations, e.g., the user manual, you will reach by clicking on **Documentation**.

Furthermore, you have access to the whole menu. Select a menu (**Spider Asset**, **Spider Licence**, **Spider Contract** or **System**). The menu items are shown in Backstage as tiles without menu sections. The order of the tiles corresponds to the home page view. As an example, the illustration shows the Spider Licence menu in Backstage.



Furthermore, an **Info page** is available. Here, you can find version information of the installed modules as well as support information, if configured.

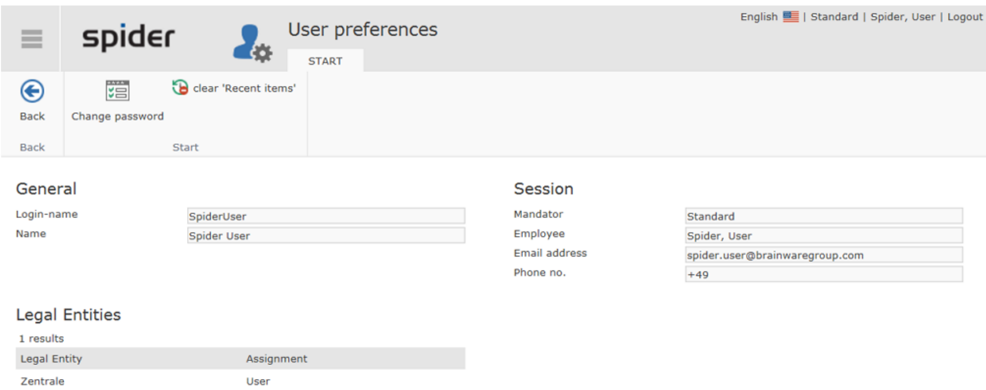


Use **Logout** to logout from the Spider system.

1.3.1 User preferences

➢ Click on the name of the logged in user in the upper right corner to open the form **User preferences**.

Under *User preferences* you can delete the list of your recently opened items (**clear Recent items**) or change the user password (**Change password**).



The User Preferences form also provides the following information:

Section	Description
General	Displays the Login name of the user.
Legal entities	Shows the legal entities for which the user is authorized in his mandator.
Session	Shows the mandator for which the employee is entered as well as the detailed information about the assigned employee. This information is important if the system has been set up for multiple mandators.

➢ After clicking on the ribbon button **Back**, you will return to the last viewed page.

1.4 Legal entities

The legal entity is used in Spider to map the organizational structure of a company. For example, you can map a group as a holding with the related companies and their divisions, departments, and responsibility areas. To be able to manage objects such as assets, licenses, contracts, etc. on the legal entity level, they must be assigned to the corresponding legal entity.

Users or roles have a permission for one legal entity. That means that the access right is granted for a legal entity and all subordinated legal entities. This is like the permission in a file system. Therefore, a user can only see objects of the assigned legal entity and its sub-organization. Whether he possesses any administrative rights, is determined by the assigned roles and role permissions. For more details **see** (see "**Legal entities**" on page 318)

Note	The search results depend on the permissions of the logged in user. This means, that the search results only contain objects of legal entities which the user is authorized to see.

1.5 Index-based search

Important	The One Search function described here up to version 6.4.7 has been removed from the range of functions!

As of version 6.4.8, the One Search has been replaced by the index-based search, which has been created from scratch. It is based on the SQL Server full-text index feature and offers the option of searching for selected spider objects:

Employees, assets, function units, contracts, contractors, licenses, articles, manufacturers, catalog articles.

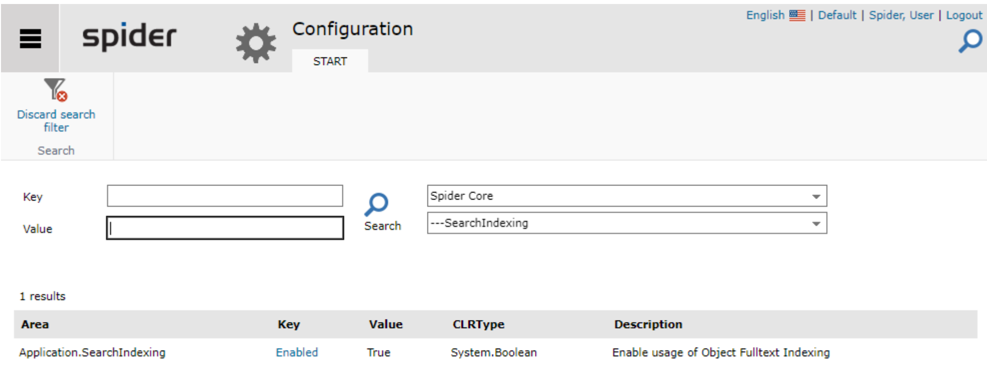
The index-based search allows you to search across multiple Spider modules. The search field can be found in almost any Spider application form in the upper right corner of the form:

1. It is used to quickly find Spider objects, even if they are in different Spider modules.
2. The search respects legal entity permissions.
3. The search returns dependent objects. For example, when searching for a contractor, related contracts and legal successors are also returned.
4. The search only returns results from the current mandator. Configured restrictions on article categories and licensed programs are enforced.

1.5.1 Requirements and Settings

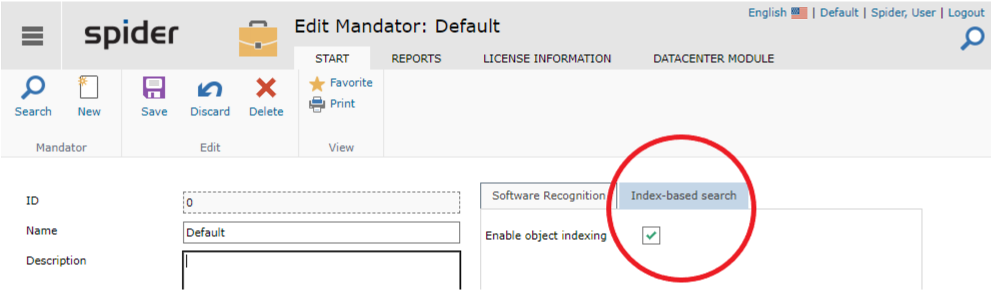
The SQL Server full text feature must be installed and activated.
Because the search index can take up several GB of disk space on the database server, the feature is disabled by default and can be enabled through Spider configuration. At least 8GB (recommended 10GB) of storage space should be available. Before activating the full-text search, make sure that sufficient disk space is available.

Settings in the Spider Admin Tool or the Spider configuration:
To activate the indexed object search, the **"Enabled"** configuration key in the Spider configuration for the "Spider Core" application must be set to True in the **"Application.SearchIndexing"** area.



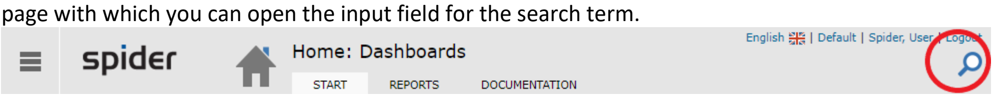
Indexing can be enabled or disabled for each mandator. This is useful, for example, to deactivate the search for test mandators so that less storage space is allocated.

➢ To do this, open the mandator details page and uncheck the "Activate object indexing" check-box.

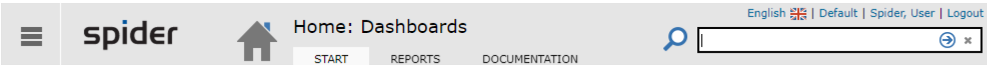


1.5.2 Search form

If the search is installed and activated, you will find a magnifying glass icon on any Spider application page with which you can open the input field for the search term.

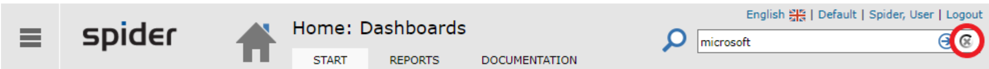


➢ Click on the magnifying glass icon to open the input field for the search term.



➢ Enter the search term and press enter or click on the blue arrow within the search form to start the search.

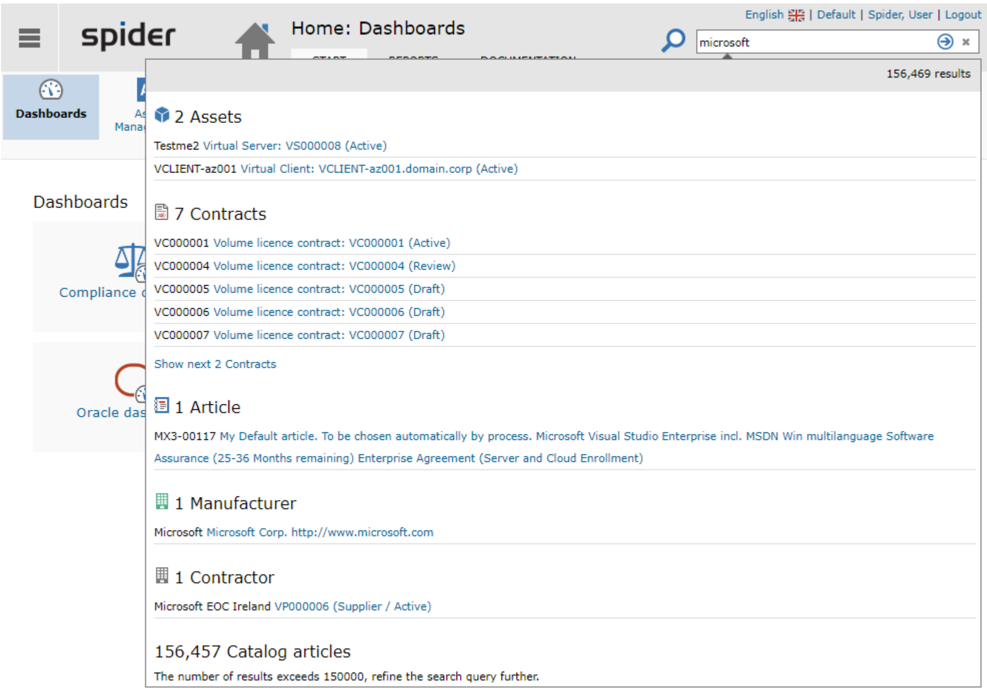
A loading icon will appear. Depending on the size of your object catalog, the search may take a few seconds.



Notice	The search is case-insensitive.

1.5.3 Display of search results

The search results are grouped by object type. The search results contain hyperlinks that lead to the corresponding detail pages of the displayed objects.



For performance reasons, the display of results per object group is limited to 150,000 hits. If this limit is exceeded, a message is displayed (in this example for catalog articles). In this case, the search query must be restricted by additional search terms.

1.5.4 Operators

If you enter several search terms, the result of the search query will contain all terms for the standard search.
The search query for "microsoft office" therefore only returns search results that contain the terms "microsoft" AND "office".

Important	The quotation marks shown here in the examples must not be used for the search!

This behavior can be influenced by using the following operators.

"AND" - operator (standard)

If no operator is specified between two search terms, the AND operator is automatically added.

Enter in the search field: [search term 1] AND [search term 2] AND [search term 3]

For example: "microsoft AND office AND professional"

The search results must now contain all three search terms, such as "microsoft office professional".

"OR" - operator

Enter in the search field: [search term 1] OR [search term 2]

For example: "office OR photoshop"

The search results must contain at least one of the specified search terms, such as "microsoft office" or "adobe photoshop".

"AND NOT" - operator

Enter in the search field: [search term] **AND NOT** [exclusion criterion]

For example: "office **AND NOT** professional"

Hits that contain an exclusion criterion are filtered out, so that only the search results, which don't contain the criterion, are displayed. For example, "microsoft office home" but not „microsoft professional 2019“.

Attention	Operators must not appear at the beginning of a search query, as they must combine two search terms. Otherwise, an internal error occurs.

1.5.5 Wildcard search

The search can be extended with the * wildcard, but this can only be used at the end of the search term.

For example: " micro* office win*"

Both "Microsoft Office Windows" and "Microsoft Office Win32" would be found.

1.5.6 Object filter

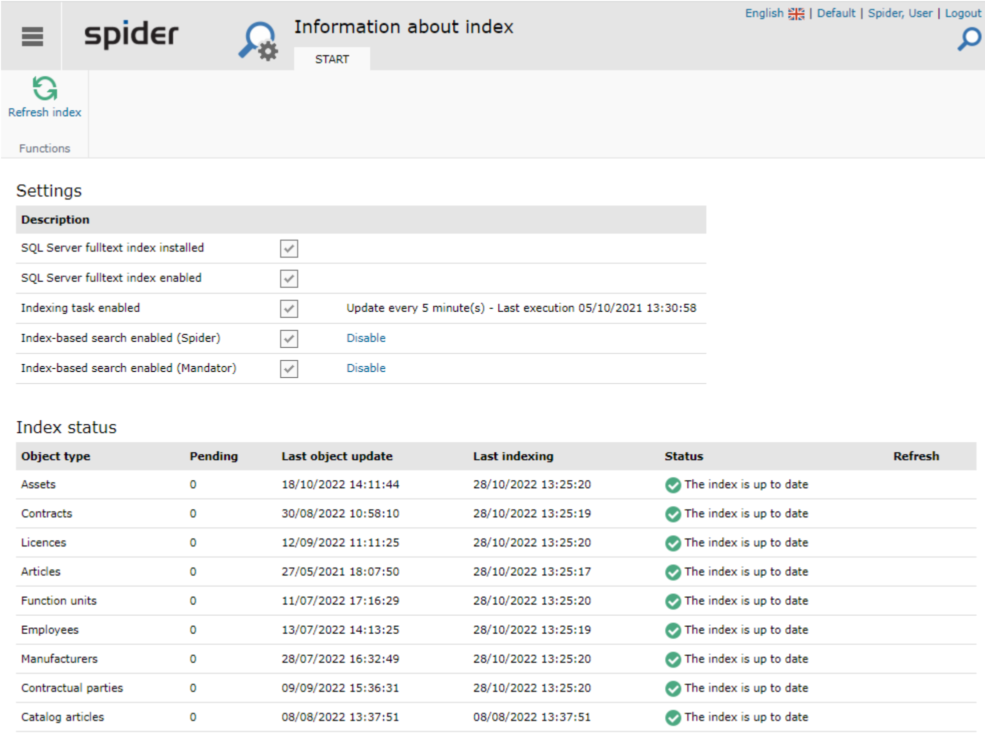
By specifying an object filter, the search can be limited to a specific object type. The object type is specified with a colon, followed by a space character and the search term.

E.g.: "asset: microsoft"
In this case, the term "microsoft" is only searched for in the asset object type. Results in other object types are filtered out.
The following object filters are available:

Object filter	Search by object type
asset:	Assets
contract:	Contracts
licence:	Licenses
functionunit:	Function units
employee:	Employees
manufacturer:	Manufacturers
contractor:	Contractors
article:	Articles
catalogarticle:	Catalog articles

1.5.7 Display of search index information

The System -> Information about index page (accessible via the main menu) displays basic information about index-based search.



Settings

Description		
SQL Server fulltext index installed	☑	
SQL Server fulltext index enabled	☑	
Indexing task enabled	☑	Update every 5 minute(s) - Last execution 05/10/2021 13:30:58
Index-based search enabled (Spider)	☑	Disable
Index-based search enabled (Mandator)	☑	Disable

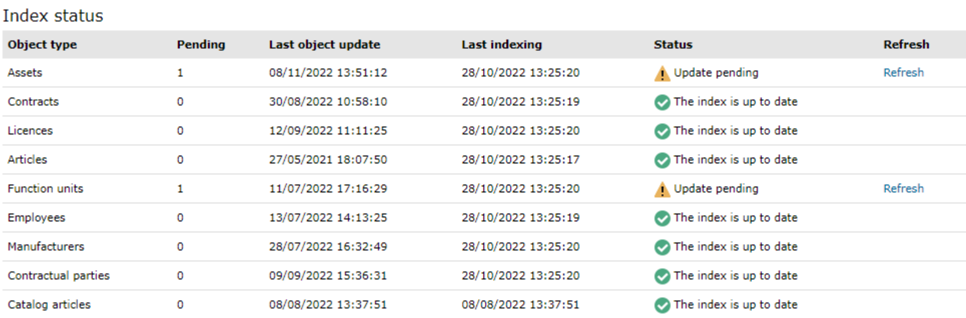
Index status

Object type	Pending	Last object update	Last indexing	Status	Refresh
Assets	0	18/10/2022 14:11:44	28/10/2022 13:25:20	The index is up to date	
Contracts	0	30/08/2022 10:58:10	28/10/2022 13:25:19	The index is up to date	
Licences	0	12/09/2022 11:11:25	28/10/2022 13:25:20	The index is up to date	
Articles	0	27/05/2021 18:07:50	28/10/2022 13:25:17	The index is up to date	
Function units	0	11/07/2022 17:16:29	28/10/2022 13:25:20	The index is up to date	
Employees	0	13/07/2022 14:13:25	28/10/2022 13:25:19	The index is up to date	
Manufacturers	0	28/07/2022 16:32:49	28/10/2022 13:25:20	The index is up to date	
Contractual parties	0	09/09/2022 15:36:31	28/10/2022 13:25:20	The index is up to date	
Catalog articles	0	08/08/2022 13:37:51	08/08/2022 13:37:51	The index is up to date	

Description	Definition
SQL Server full text index installed	Indicates whether the full-text feature for the SQL Server is installed.
SQL Server full text index enabled	Indicates whether the full-text feature is enabled for the SQL Server.
Indexing task enabled	Shows whether the spider service task for the index is active, the interval at which it is run and when it was last run.
Index-based search enabled (Spider)	Indicates whether index-based search is enabled for all modules. The setting can also be changed by clicking on "Activate" or "Deactivate".
Index-based search enabled (Mandator)	Indicates whether index-based search is enabled for the current mandator. The setting can also be changed by clicking on "Activate" or "Deactivate".

The “Index Status” table contains information about the index status for each object type.

If the update of the index has not been processed within the time allotted, you have the option of forcing the update here. An "Update" link is displayed for each object type. Clicking on the link forces renewal of all objects of the type in the index.



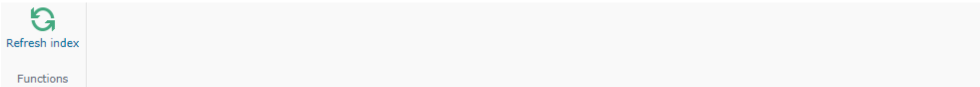
Index status

Object type	Pending	Last object update	Last indexing	Status	Refresh
Assets	1	08/11/2022 13:51:12	28/10/2022 13:25:20	Update pending	Refresh
Contracts	0	30/08/2022 10:58:10	28/10/2022 13:25:19	The index is up to date	
Licences	0	12/09/2022 11:11:25	28/10/2022 13:25:20	The index is up to date	
Articles	0	27/05/2021 18:07:50	28/10/2022 13:25:17	The index is up to date	
Function units	1	11/07/2022 17:16:29	28/10/2022 13:25:20	Update pending	Refresh
Employees	0	13/07/2022 14:13:25	28/10/2022 13:25:19	The index is up to date	
Manufacturers	0	28/07/2022 16:32:49	28/10/2022 13:25:20	The index is up to date	
Contractual parties	0	09/09/2022 15:36:31	28/10/2022 13:25:20	The index is up to date	
Catalog articles	0	08/08/2022 13:37:51	08/08/2022 13:37:51	The index is up to date	

Column	Definition
Pending	Shows the number of changed objects since the last update.
Last object update	Displays the most recent date of a change for this object type.
Last indexing	Shows the date of the last index update for this object type.
Status	Displays the current index status. For the status "Update pending", this means that the next time the service task runs for the index for this object type, updates will be considered.

To force a full rebuild of the index, the "Refresh index" button is available in the ribbon menu.

Rebuilding the entire index may take several minutes. During this time the search is available to a limited extent.



1.6 Search forms

Spider offers the option to search for information on objects. This search option on similar objects is called object search. To create queries that exceed the boundaries of one object and its types please refer to chapter “**Advanced search**” on page **301**

If Spider Indexing One Search is installed, searching in different **modules** is also possible (see "**Index-based search**" on page **39**).

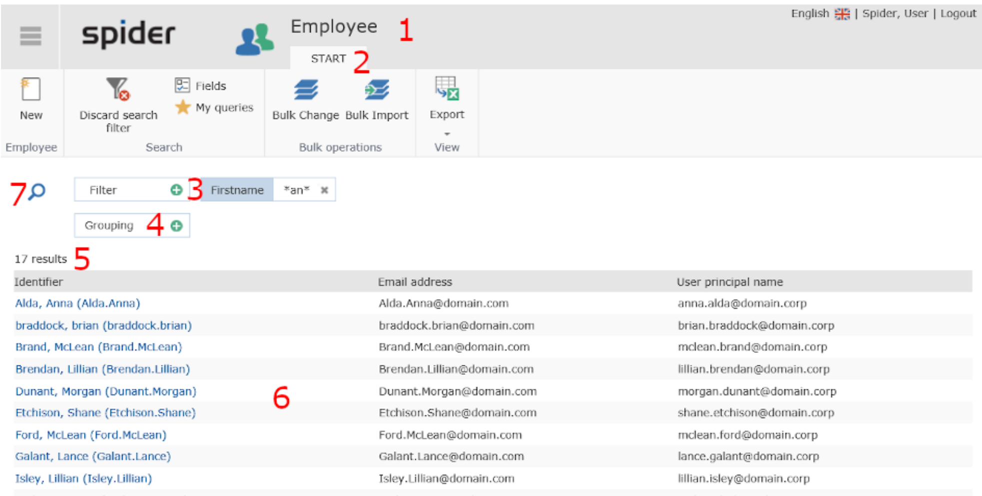
1.6.1 Search on object level

The search is carried out via the search forms. Apart from numerous search filters, you can use various search criteria for refining the search results. These results can then be sorted and grouped by various fields and is displayed as a data grid. Grouped data can also be displayed as bar or pie chart.

The result can also be exported to Excel or CSV format if required.

The search forms in Spider Asset, License or Contract basically share the same structure. They differ in terms of their options, functions, and search filters.

- If you want to search all employees for example, you go to the home page or **Backstage** (on page 35) and click on **System** and then on **Employee**.



No.	Meaning
1	This title shows the object which is used for the search.
2	In the **Start** ribbon, all available functions and options are summarized for the corresponding object search.
3	Add object fields to a list of search criteria
4	Enable grouping by clicking the button or drag & drop a column heading here.
5	If a search has been executed, the hit number is shown here. A pager is shown if the returned number of rows exceeds the displayable number of rows.
6	Search results are shown as a data table, a bar graph or a donut graph. In the chapter **The search result** (on page 57) you will learn how to sort, adapt, and export the search results.
7	Force the search to run by clicking here.

1.6.2 Search functions

In the search area, several functions and options are available. Depending on the user permissions and type of search, the options may vary.

Function / Option	Description
Discard search filter	Click on the **Discard search filter** button to delete the entered search criteria and reset the search.
Type selection (Typed objects only)	Searches objects of the specified type only. Enables searching for object type fields.
Fields	Use the field selection **Fields** to decide which object fields shall be displayed when the results are listed. Detailed **information** (see "**Customize search results - Field selection**" on page 57)
My queries	Use **My queries** to save your searches. A description of this **function** (see "**Save a search (My queries)**" on page 57)
Bulk Change	The Bulk Change provides the functionality to edit fields of the displayed objects only (see **Bulk changes** on page 57).
Bulk Import	Clicking this button starts a guided process to import object data from an excel sheet (see **Bulk import** on page 59.
Export	Use this button to export data into an Excel or CSV format. Information about **data export** (on page 57)

1.6.3 Search filter

By means of the search filter, you can refine your searches in Spider. Depending on the object, several different filters are available. Please find below a more detailed explanation of these filters.

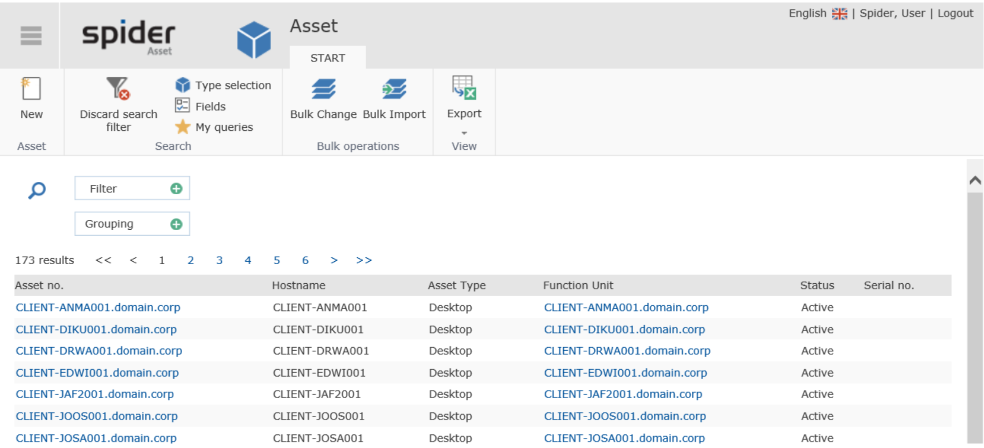
Note Your search filters are persistent and will be re-applied when the page is opened again.

New filter definitions will be ignored while a search is processed by the system.

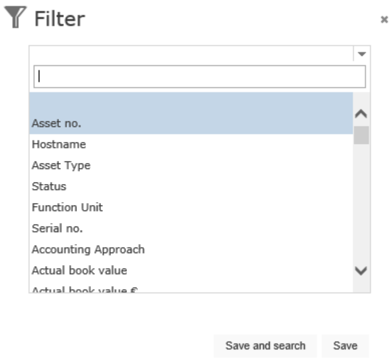
Field search

Use the field search to filter by field content and thus restrict a search result. You will have to determine the field and the search criterion. The criteria are defined with the help of dialogs that provide proper settings according to the chosen field type. The filter is available on most search forms.

The illustration shows the field search in the Asset search.



By dropping a column heading of the result table onto the **Filter** button, the according filter dialog opens. If the filter criterion is not present in the header of the table, it can be accessed by clicking on the **Filter** button and then choosing a field from the list on the filter dialog:



The list of object field is automatically expanded. According to the data type of the selected field the definition dialog changes its appearance.

Filter definition: text object field

Fields that hold a string of characters allow text comparison. See the dialog of the field **AssetNo:**

The **Contains** mode makes the search find any object that contains this string in the defined field. The filter criterion may also be a substring of the searched field. Whereas the mode **Contains not** excludes all findings of the defined substring from the result.

Both modes support placeholders:

Criterion	Meaning
String	Entering one or more characters finds all objects which contain this character string in the specified object field. An Asterisk is automatically added at the beginning and the end of the string of characters.
Asterisk *****	The placeholder ***** represents an arbitrary number of characters and finds also empty entries. It is automatically added to the search string if there was none entered. **Example**: The search string **ABC*** will only find entries starting with ABC, whereas ***ABC** will find all entries ending with ABC. The search string **ABC*BC1** will lead to the search criterion ***ABC*BC1***.
Placeholder **-**	The placeholder **_** represents exactly one arbitrary character. **Example**: The search string **AB_** will only find entries starting with AB and followed by exactly one arbitrary character. If you enter ***10_**, Spider will find all entries ending with the string 10 and one additional arbitrary character.

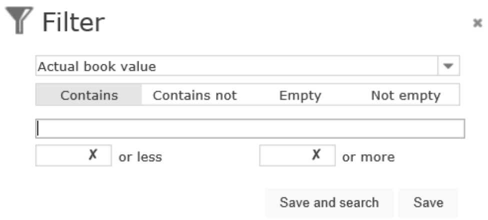
Searching for empty or non-empty fields is done by using the search mode “**Empty**” or “**Not empty**”. Empty may mean a string with no length or a string field that was never set in the database.

Exiting the dialog with “**Save and search**” will start the search operation immediately. “**Save**” saves the new search criterion without performing an object search. When an object search is carried out, its parameters cannot be changed until it is finished.

Filter definition: numeric object field

Fields that represent a number or numeric value the filter definition dialog adjusts the available options accordingly.

See the example dialog for "**Actual book value**":



The operands **equal** and **not equal** do a mathematical comparison of numbers. To find objects where the field is not set, use "**empty"**, otherwise "**Not empty**".

The options "**or less**" and "**or more**" cannot be combined and are valid for mathematical comparisons only. They return objects where the search field contains a number that is equal or less/greater as the given number.

Exiting the dialog with "**Save and search**" will start the search operation immediately. "**Save**" saves the new search criterion without triggering an object search to be executed. When an object search is carried out, its parameters cannot be changed until it is finished.

Filter definition: list of values

Object fields that are limited to a list of values do not allow a free text search. The possible entries are represented by the defined list of values for this object field.

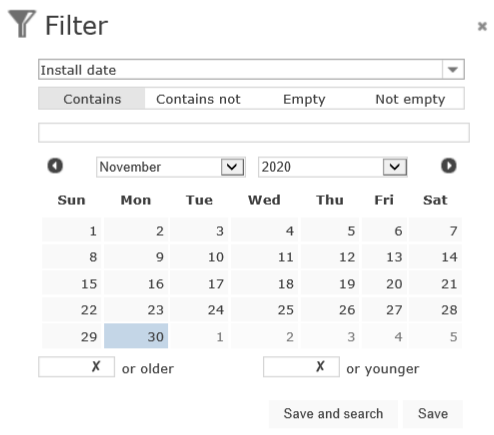
As example see the filter definition for asset status:

The dialog allows to search for exact match or excusive result set. When searching for empty data fields use „**Empty**" whereas the option „**Not empty**" finds all objects which have been set at least once.

Exiting the dialog with "**Save and search**" will start the search operation immediately. "**Save**" saves the new search criterion without performing an object search. When an object search is carried out, its parameters cannot be changed until it is finished.

Filter definition: date

Filtering for date values brings up a specialized dialog:



This dialog supports entering values as plain text or with the help of the date picker control. Additionally, one of the options „**or older**" and „**or younger**" are possible.

Note	When entering a date as string, keep the language and culture settings in mind as the string needs to correspond to these settings.

Exiting the dialog with "**Save and search**" will start the search operation immediately. "**Save**" saves the new search criterion without performing an object search. When an object search is carried out, its parameters cannot be changed until it is finished.

Filter definition: legal entity

Objects which have, or inherit a legal entity, support a legal entity filter definition. The search supports finding objects with a matching legal entity and legal entities that have a lower ranking:

Nr.	Meaning
1	This is the selected legal entity.
2	The option last used presents the recently selected legal entity paths, otherwise the legal entity is selected by browsing the legal entity tree.
3	When selected also subordinate legal entities are included in the search.
4	Content area where legal entities are displayed.
5	Legal entities are represented by individual tiles. Clicking on a tile updates the selected path (see 1) and shows the next layer of legal entity. To search for objects without legal entity select the tile named **Without Legal Entity** on root level.

After selecting a valid legal entity, the dialog can be closed by clicking "**Apply**" or "**Cancel**". **Cancel** will not affect the search criterion, **Apply** saves the changes and starts a search operation.

Note	The «Apply» button is hidden or inactive if an invalid legal entity was selected. A legal entity selection is valid if the user has the direct or inherited right to see objects in it.

Filter definition: object type

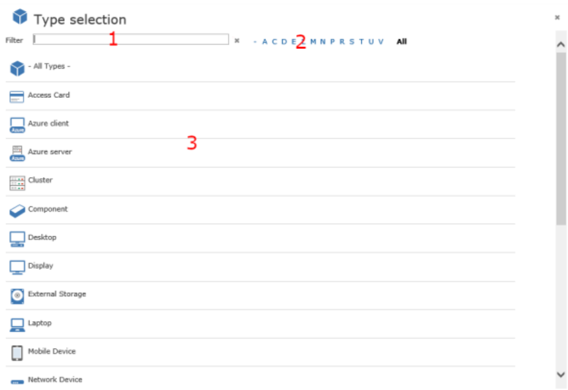
Typed objects support to filter by their type. The type filter dialog is accessible from main menu or by choosing type filter from the filter field list.

Type specific fields need a type filter to be set to appear in the filter list. The dialog closes by clicking on a tile named with the object type, the tile „ – All Types – " or by clicking the "x" icon in the upper right corner of the dialog. The "x" discards any changes.

After closing, the dialog a search operation is performed.

Note	The dialog does not apply user rights. The list of object types represents all defined types of the system. User rights are applied during search operation.

In case of an asset type filter, the dialog show as follows:

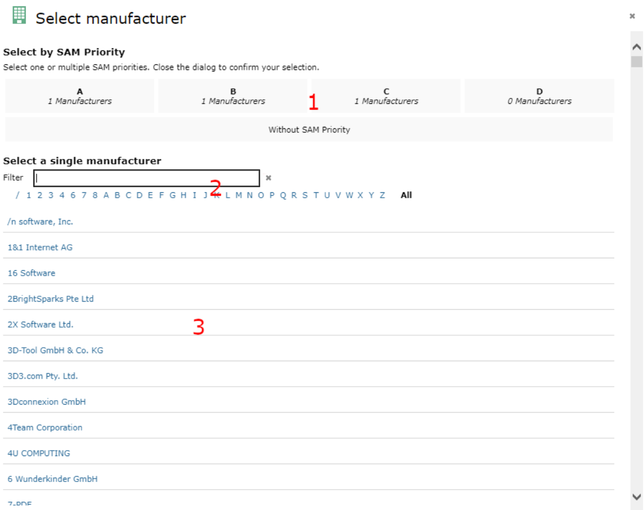


No.	Meaning
1	Search for asset types with the given substring
2	Quick filter for the first character of the type name.
3	Content area with the filtered asset types.

Filter definition: manufacturer

Using the manufacturer filter, a result can be made according to an individual manufacturer as well as according to a group of manufacturers organized in SAM priorities. While a selection of multiple SAM priorities is possible, only one can be selected at a time from the list of individual manufacturers. Filtering by a SAM priority excludes filtering by individual manufacturers as well as the other way around.

In case of a manufacturer filter, the dialog show as follows:



No.	Meaning
1	SAM-Priority A to D
2	Search for manufacturers with the given substring and Quick filter for the first character of the type name.
3	List of manufacturers to choose from.

Clicking on a single manufacturer closes the dialog and accepts the selected manufacturer. To select one or more SAM priorities, activate the corresponding priority fields and close the dialog.

1.6.4 Implicit filters

Some filters do not need to be defined explicitly. Some are already built in like the mandator filter or the filters that come with the rights of the logged in user. These filters cannot be changed by filter settings.

Status and property “archived”

In addition to the filters mentioned above, the search mechanism filters all archived objects by default. To include archived object in the result list, the filter criterion “Archived” must be set to override the default setting.

Note Defining a status filter is not enough in this case. Choosing a status with the archived property, the search operation will not find any objects if the “Archived” option is selected as filter too.

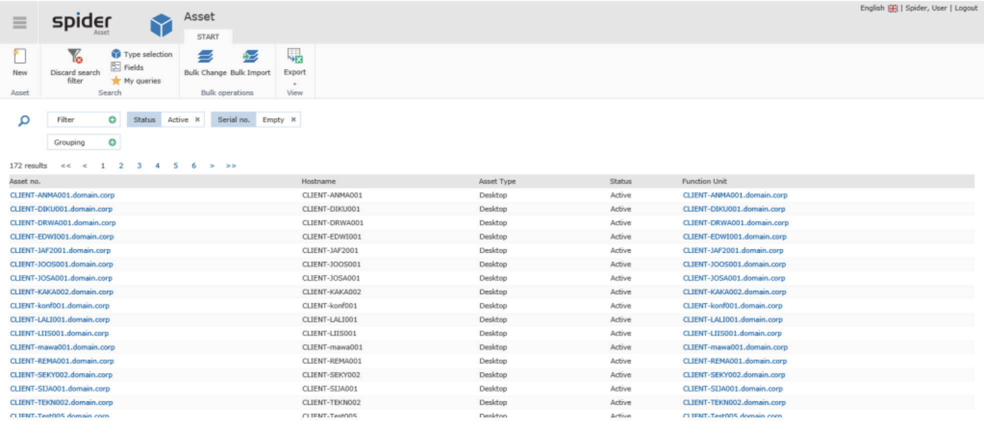
1.6.5 Global filters

Global filters affect object searches and dashboards. Once defined they will affect these pages until they are deleted again. Even when changing between different search or dashboard pages.

Global filter criteria can be defined on object search pages and are marked by a globe icon: Global object fields are the legal entity, the archived property, and the manufacturer. The manufacturer filter is valid in the Spider License module whereas the legal entity filter applies to all Spider modules.

1.6.6 Object search with defined filters

If search filters are defined the search page shows them as elements in the Filter row. The example shows an asset search with a status and a Serial no filter:



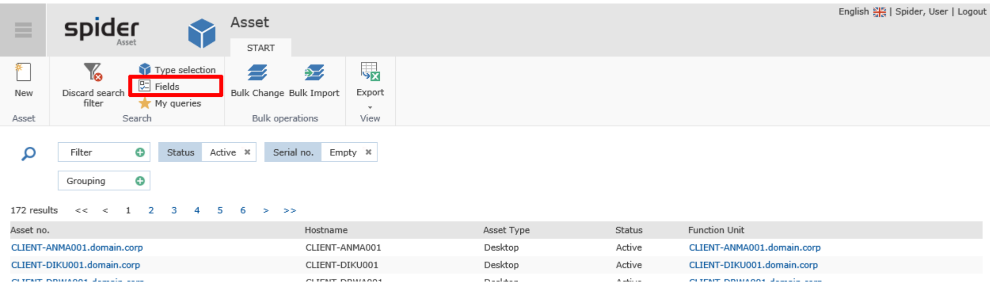
The filters can be edited by clicking on them. Then the according filter dialog appears again. To delete a single filter, click on the “x”, to delete all of them choose “**Discard search filter**” from the menu. Any of these actions will trigger a search operation to be performed.

1.6.7 The filter result

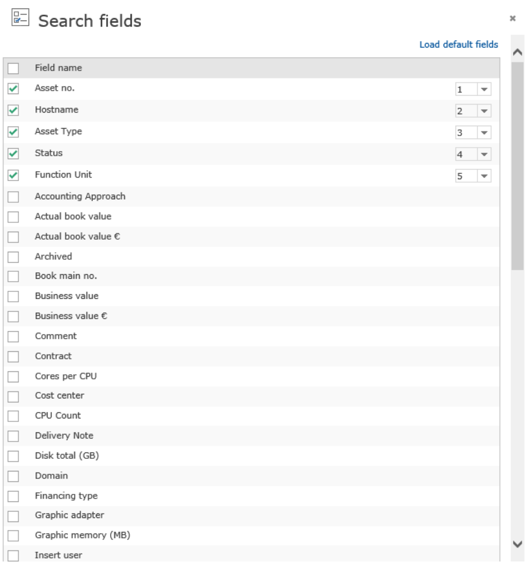
The result count is not limited by default, but the page size is. In case of too many results a pager indicates more results than displayed on the screen. Navigation is done by clicking on the specific page number or by browsing using the arrow indicators.

Search result refinement

Selecting the fields, the search result should display is done by the “**Fields**” button in the search menu.



To add fields to the result, check the box belonging to the field name. Checking the box in the header row will check all boxes. Unchecking it will uncheck each check box.

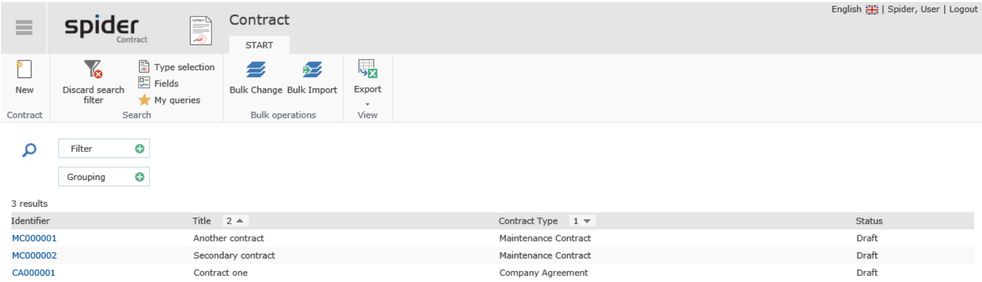


The position of the field in the result table can be defined by the dropdown list that appears on all selected search fields. Each search field will result in a column in the result table. This configuration also affects the Export to Excel functionality.

Click on **Load default fields** to reset the configuration to the default set of search fields.

Order Search results

By clicking on a column header, a sort marking appears beneath it and the result table is sorted by the clicked column field. Sorting by multiple columns is possible. In this case the sorting order corresponds with the order the column headers are clicked.



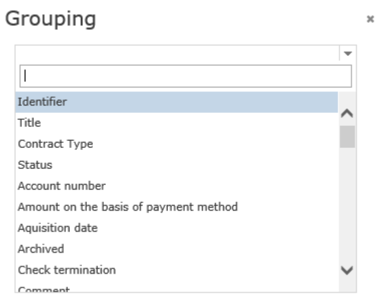
The Example above shows a result that is ordered by the Contract type in descending order first and then by the Title in ascending order.

To switch between ascending and descending order, click on the header itself. Clicking on the order mark reduces the rank of the order criterion by one. Has the clicked-on element already the lowest order rank, the order mark is removed.

If no order mark is set, the default order is done by object ID.

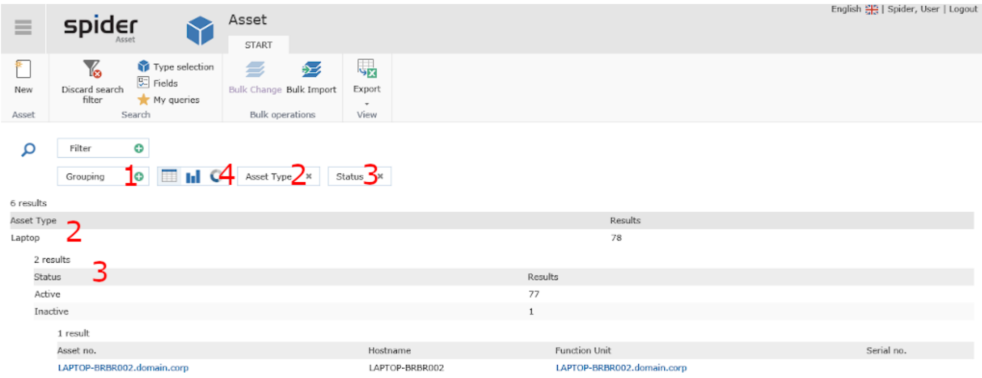
Grouping Search results

By dragging a column header by mouse and dropping it onto the **Grouping** button the result is grouped by the corresponding object field. This can alternatively a be achieved by clicking the **Grouping** button and selecting an object field from the appearing dialog:



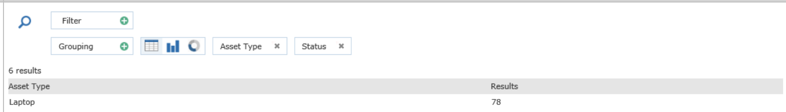
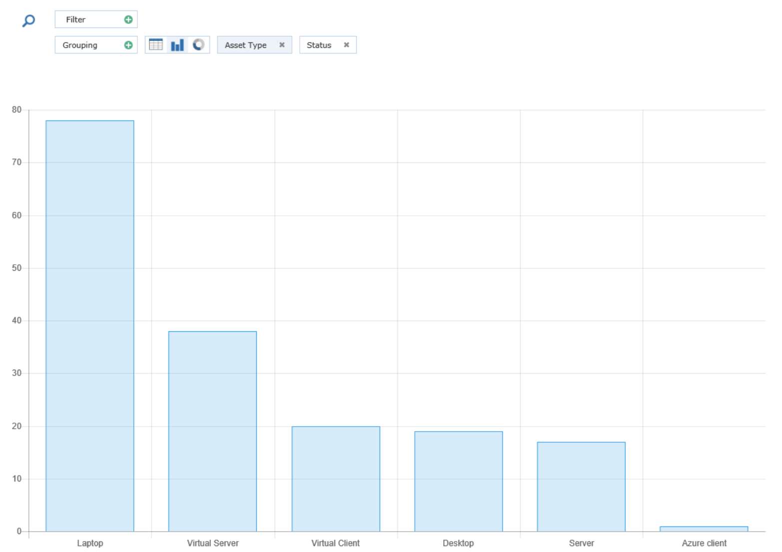
Cancelling the action is done by selecting nothing and closing the dialog with the help of the "**X**" in the upper right corner.

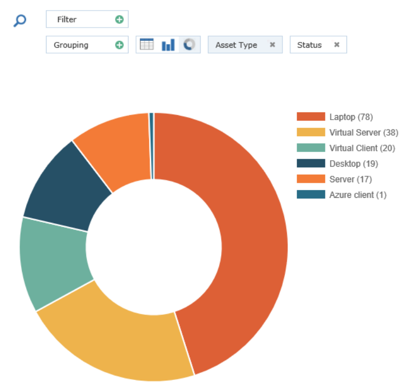
An Asset search that is first grouped by **Asset Type** and then by **Asset Status** may look as in the picture below.



No.	Meaning
1	Button for enabling grouping functionality
2	First group by field
3	Second group by field
4	Display format of the result - table - bar graph - donut chart

Grouped data supports three different rendering modes to display the result data:

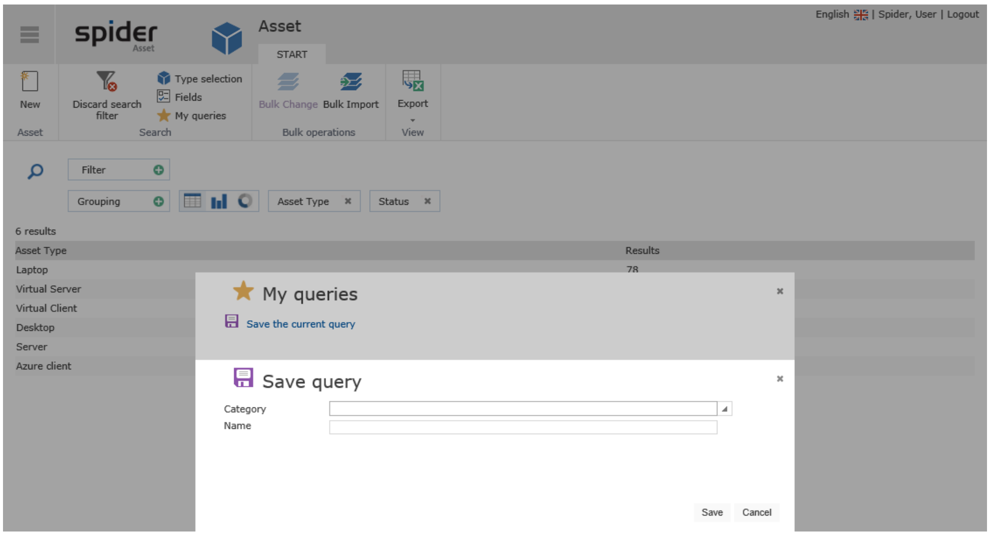
Mode	Rendered as
Result table	
Bar graph	

Mode	Rendered as
Donut chart	

When multiple grouping criteria are defined a click on the element does a drill down. In this case the table is the only render mode that can display several layers simultaneously.

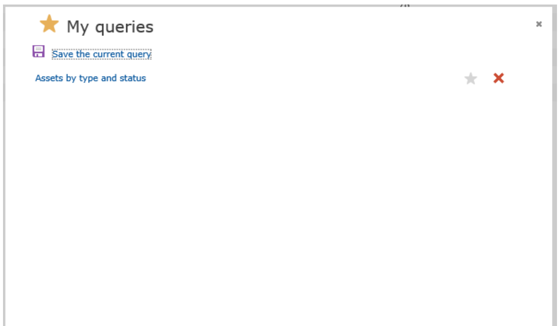
1.6.8 Saving a search configuration

With the help of the “**My queries**” button in the “**Search**”-Area of the ribbon menu a search configuration can be saved. The search filters and the grouping conditions were saved, the render mode, the sorting, and the state of the result table (which row was expanded) were not. To save a query, click on “**My queries**” button. After the “**My queries**” dialog pops up, the “Save query” dialog opens when clicking on “**Safe the current query**”.



Select a category if needed or provide a new category name. After the query name was specified, it can be saved by hitting the “**Save**” button. “**Cancel**” aborts the process and save nothing.

If the query was saved, it appears as new query in “**My query**” dialog. In the picture shown below the newly created query was named “Assets by type and status”.



To make this query a favorite only one click on the grey star icon is needed. The star turns yellow indicating that this query is on the favorites list. To remove it from the list, an additional click is needed.

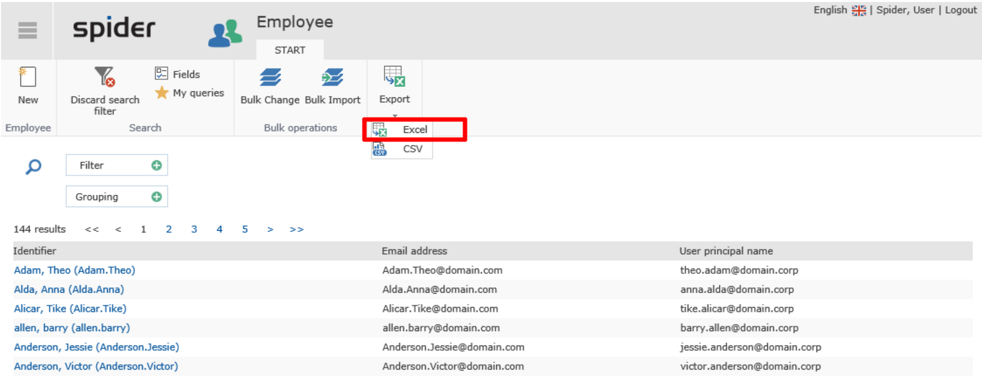
To delete the query, click on the red “x” beneath the favorite star.

1.6.9 Data export

Spider offers the option to export data to the Excel or CSV format.

Excel export

On the forms showing the **Export** ribbon button, you can export the search result.



In the following example, the export of an employee report into Excel format is shown.

➢ Click on the Excel button.

Note	The download process for files depends on the used browser.

The results will be shown in an Excel sheet. If required, you can edit the data there and then save them in any place you want.

	A	B	C	D
1	ID	Identifier	Email address	User principal name
2	1	Adam, Theo (Adam.Theo)	Adam.Theo@domain.com	theo.adam@domain.corp
3	4	Alda, Anna (Alda.Anna)	Alda.Anna@domain.com	anna.alda@domain.corp
4	5	Alicar, Tike (Alicar.Tike)	Alicar.Tike@domain.com	tike.alicar@domain.corp
5	6	allen, barry (allen.barry)	allen.barry@domain.com	barry.allen@domain.corp

CSV export

If you select CSV export instead of Excel export, the process is similar.

The resulting file then has a semicolon separated CSV format.

```
"ID";"Identifier";"Email address";"User principal name";
"1";"Adam, Theo (Adam.Theo)";"Adam.Theo@domain.com";"theo.adam@domain.corp";
"4";"Alda, Anna (Alda.Anna)";"Alda.Anna@domain.com";"anna.alda@domain.corp";
"5";"Alicar, Tike (Alicar.Tike)";"Alicar.Tike@domain.com";"tike.alicar@domain.corp";
"6";"allen, barry (allen.barry)";"allen.barry@domain.com";"barry.allen@domain.corp";
```

1.7 Bulk operations

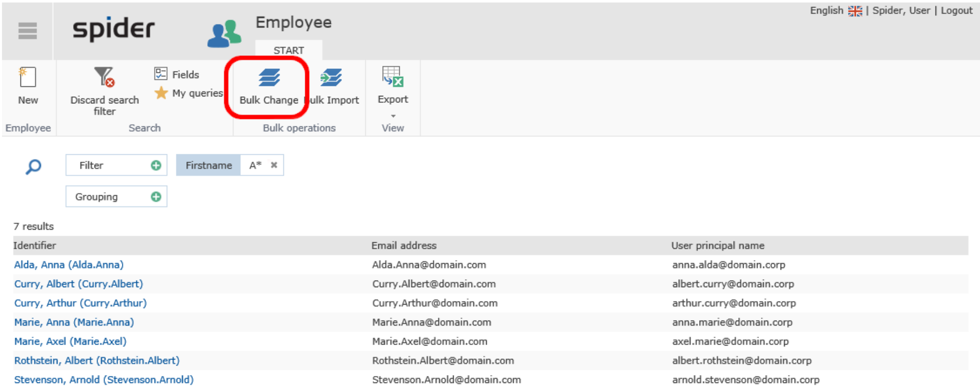
The functions of the ribbon group *Bulk operations* are available in all Spider modules.

1.7.1 Bulk changes

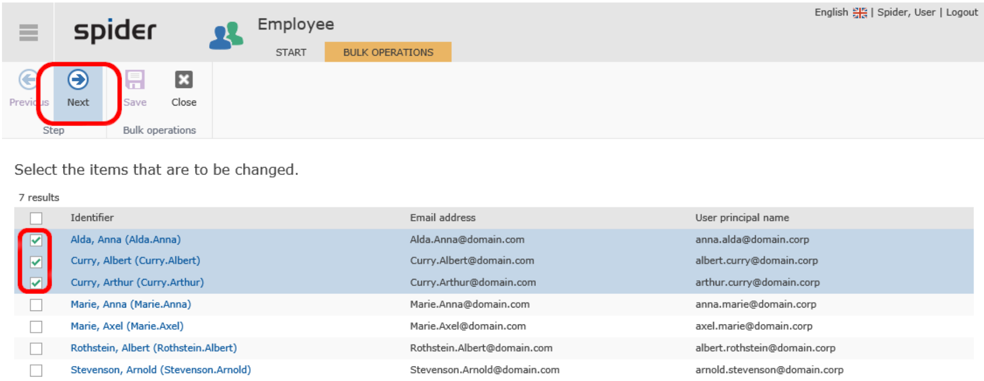
Bulk changes are always based on a search result.

➢ Click on e.g., **Employees** in the *Master Data* and select the desired search using the filters.

The following example shows how to move several employees from cost center *Sales* to cost center *Marketing*.



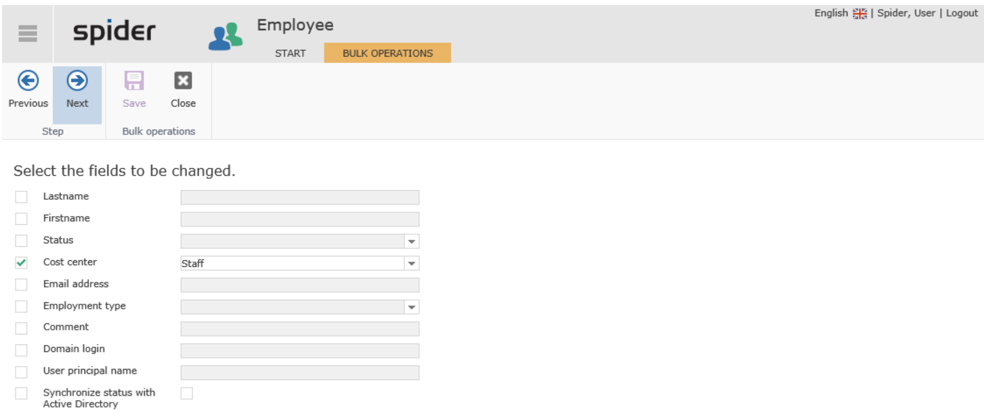
➢ Click on the **Bulk change** button in the *Bulk operations* ribbon group.



➢ Select the objects to be changed and click **Next.**

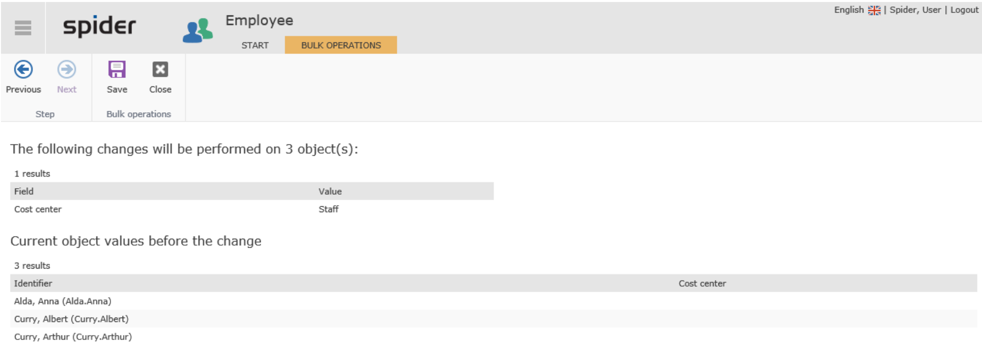
Note	If the search result contains more than 100 objects, the object selection is not available. In this case, the multiple changes will affect all objects of the search result.

All fields which can be changed at the corresponding object are offered for selection.



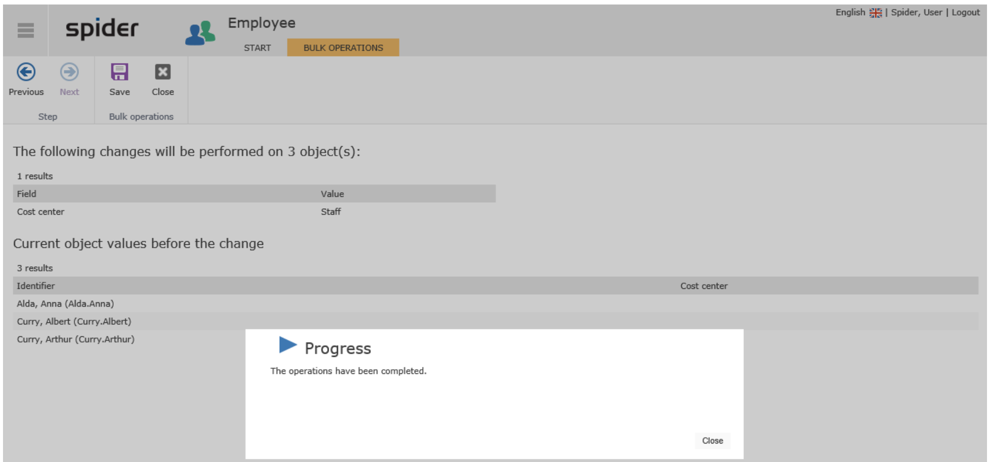
➢ Tick the check box of the object fields which are to be changed.

- Adapt the field contents. In our example, select the new cost center from the Dropdown-List and click **Next**.



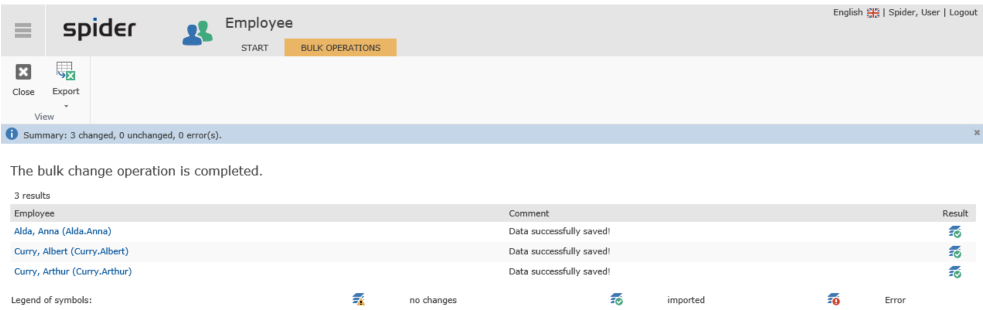
Once again, you will be notified that, by executing the next step, you will change the field contents in the cost center field of all listed objects.

- When you click on the **Save** button in the *Bulk operations* ribbon group, the change process will be started.



The process progress will be shown.

- To conclude the multiple changes and show the result of the bulk operation, click on the **Close** button.



- By clicking on the **Close** ribbon button, you will return to the search form.

1.7.2 Bulk import

The Bulk import function can be used for the creation of new objects as well as for changing or even deleting existing objects. At present, import files in Excel format can be processed.

In the following example, the Bulk import is used to change the status of 3 employees from active to retired.

Note The Excel sheet can be created by an export.

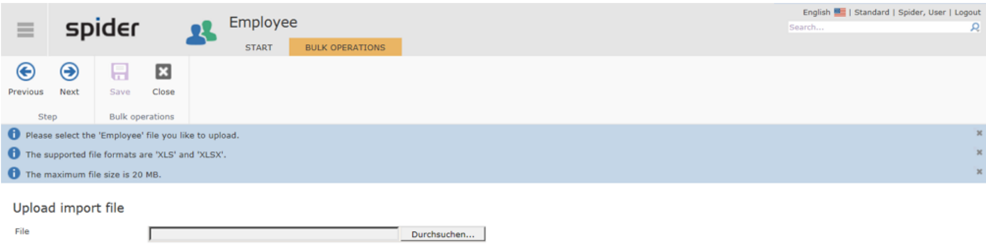
ID	Vollständiger Name	Kostenstelle	E-Mail-Adresse	Telefonnummer	Status
3	Daugs, Daniela	Sales 1000 100	Danielaa123345@brainwaregroup.com	1080044444444	Has left
4	Dittrich, Laura	Sales 1000 100	L.Ditt.1234@brainwaregroup.com	1080044444444	Has left
14	Kuhn, Sabrine	Sales 1000 100	Kuhn.Sabrinexxx@brainwaregroup.com	494215555555	Aktiv
17	Scheid, Lea	Sales 1000 100	Lea.Sch.434@brainwaregroup.com	4942134343435	Has left
21	von Bohlen, Albert	Sales 1000 100	Albert.VonBohlenyyyy@brainwaregroup.com	494215555555	Aktiv

Note ID column should be used only if the data have been exported before. Otherwise, you should use alternative key fields.

➢ In the employee search form, click on the **Bulk import** button in the *Bulk operations* ribbon group.

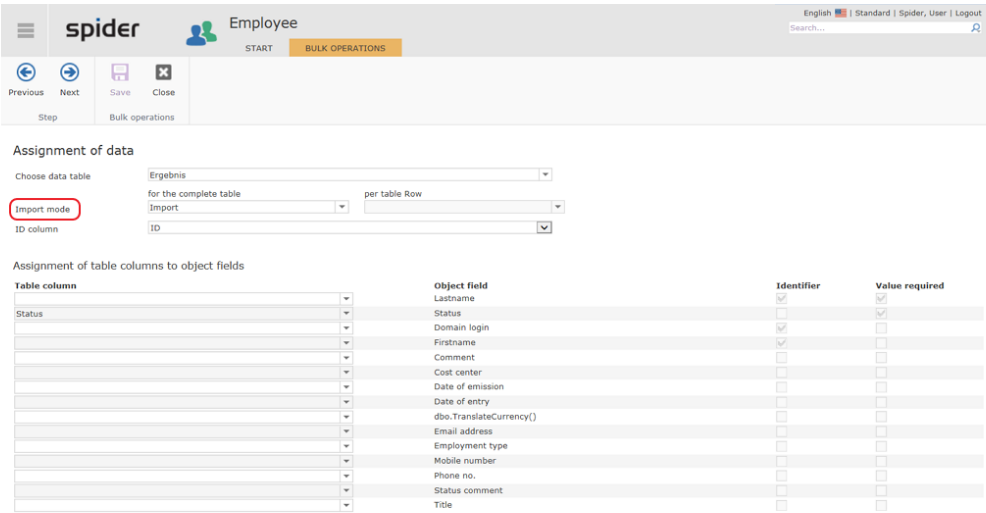
Note Alternatively, you can use this via *home page -> System ->Master Data -> Import data*.

You will be prompted to select the path to the import file.



➢ Select in the browser the import file and click on **Open**.

With the processing, you can determine the import mode (Import / Update / Insert / Delete).

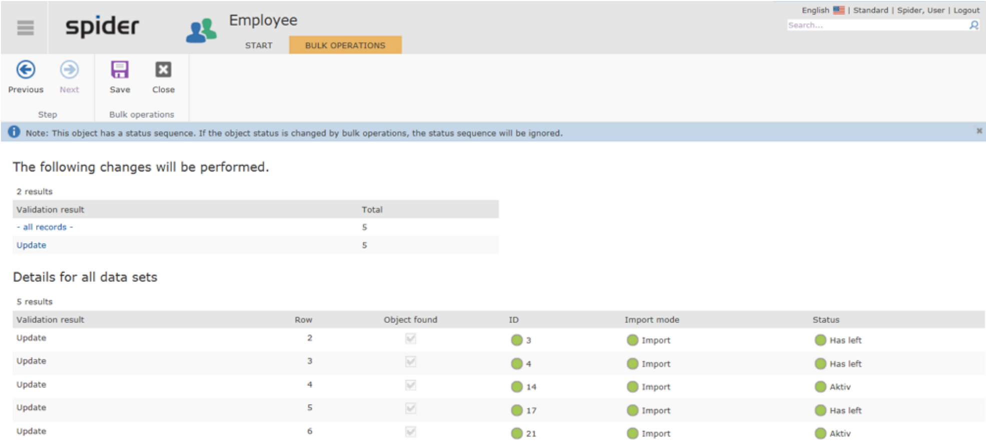


Import mode	Description
Import	Depending on whether an object has been found or not, the import mode IMPORT will execute an update or a new creation.
Update	The import mode UPDATE is used to update existing objects.
Insert	The import mode INSERT is used to create new objects. Existing objects will not be updated.
Delete	DELETE will delete existing objects.

The import mode can either be determined for the entire table or per line. If determined per line, a column **ImportMode** with the supported values (Import, Insert, Update, Delete, Ignore) must be present in the table.

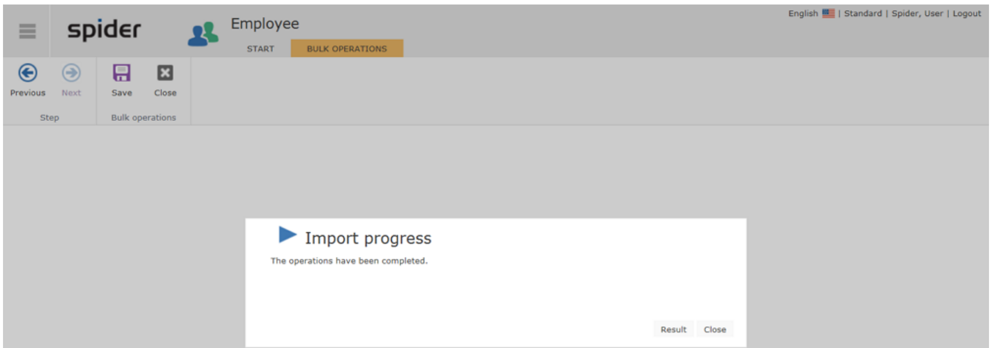
- Select the Assignment of table columns to the object fields.
- Click on **Next** to start the validation.

The result of the validation is shown in the following form.

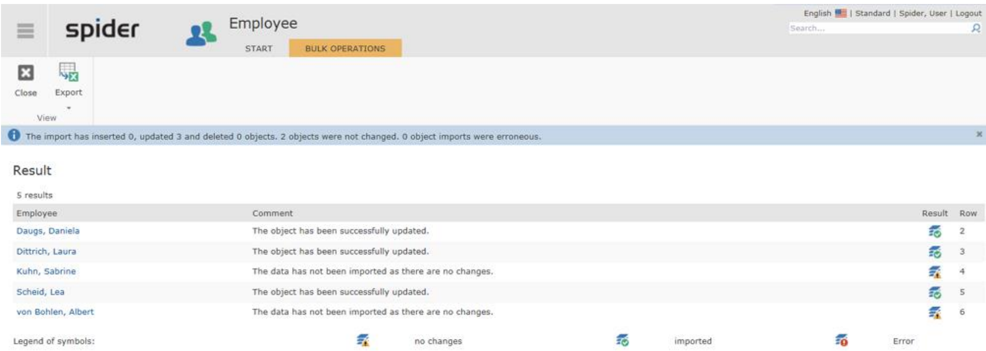


Important	Records with faulty or invalid values will not be processed and must be corrected before processing in the source file.

- Click on **Save** to execute the bulk import or on **Close** if you want to cancel this import.



- Click on the **Result** button to show the result.



- By clicking on the **Close** ribbon button, you will return to the search form.

CHAPTER 2

IT Management with Spider Asset

The following chapters describe in detail how data from the peripheral systems are transferred to Spider Asset, how they are classified by the software recognition and how they are automatically created in Spider Asset. Furthermore, you will learn how to work with the main objects in Spider Asset.

The main menu is the central hub for all Spider products. From here, you can use all functions for the configured roles. After the login, the main menu is shown in the corresponding role configuration. Dependent from the user role e.g., master data or buttons for menu settings are either shown or hidden.

2.1 Glossary of terms

2.1.1 Asset

The asset is the central object within Spider Asset and used for managing the technical and organizational data of a device as well as the related software. In the IT environment, asset object is mainly: Desktop computers, laptops, server, router, printer, etc. which are integrated into an IT infrastructure.

2.1.2 Asset model

Since different devices have different properties and therefore must be described with different parameters, various asset models (templates) have been stored in the system. To eliminate the necessity to repeatedly enter all the basic data, you have the possibility to enter default values such as a screen resolution or a screen size into the parameter fields of an asset model.

The asset model functionality is available in the ITM and Enterprise editions.

2.1.3 Software / Software shopping cart

Software will be assigned to most of the IT assets. The software shopping cart is used to define the software which can be selected. For more information, please refer to the section **Software Management** (see "**Manual software management**" on page 124).

2.1.4 Software assignment

Software can be assigned to and managed in assets, employees, or function units. Usually, a software assignment corresponds to the software installed on a specific device (asset). For more information, please refer to the section **Software assignment** (see "**Software assignments**" on page 126).

2.1.5 Status management

States are provided in Spider Asset for the objects Asset and Function unit. The set status always shows the current condition (e.g., canceled, finished, etc.) of an object. The purposeful usage of this function facilitates an improved mapping of the life cycle of the objects.

2.1.6 Status sequences

Status sequences are used to control a specific process sequence for the status objects Asset and Function unit. The status represents the current procedural state of an asset or a function unit. Furthermore, they can be used for using certain automatisms in Spider Asset. Thus, you can save a rule for the Filed asset status which will send an e-mail to a predefined addressee each time an asset will reach this status.

More information on **Status sequences** (see "**Asset status**" on page 71).

2.1.7 Location / Location tree

Use the Location / Location tree object to create several locations and manage them in a centralized point. The location enables you to assign assets and function units to an exact geographical position.

2.1.8 Employee View

Employee objects are maintained in the System area and required in the Asset module to handle software assignments. The employee view cannot be used to edit employee master data, but manual software assignments can be configured. Further objects associated with the employee, such as Assets, Licenses or Contracts are listed here.

2.1.9 Function unit

A function unit can be seen as a logical bracket. It combines several assets and other features and groups them. A function unit can be used to e.g., combine all assets of one workplace (desktop PC, monitor, printer, etc.). Furthermore, you can assign employees and software to the Function unit object. Depending on the configuration, other assignments are available.

2.1.10 Relationship

Use the **Relationship** object to define relationships of function units. The relationship can be seen as a directional edge which connects a primary with a secondary function unit.

2.1.11 Software Services

Software Services ensures the regular transfer of data from a wide range of inventory systems. The inventoried raw data is then subjected to a standardization process before software products are identified. A comprehensive and transparent presentation of the inventory data is also one of the quality-assuring functions of Software Services.

2.1.12 Software recognition

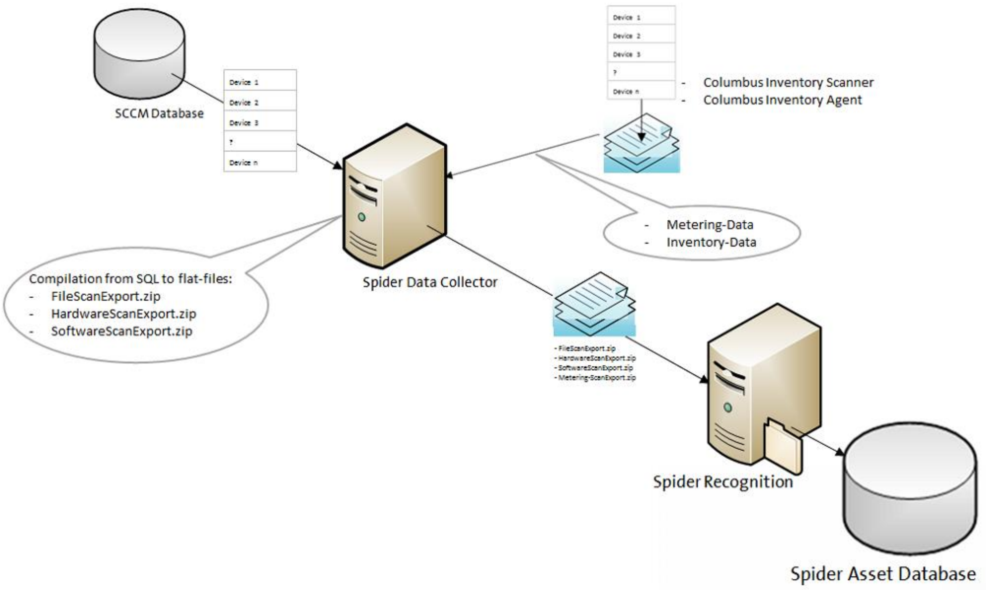
The recognition module recognizes license-relevant software products on inventoried computer systems. Data from the scans of hardware, files and software are used. The recognition is based on a comparison of known file and software signatures with a signature catalog and additional recognition rules.

To ensure that the recognition rules used in your company and the signature catalog can reliably explain the inventoried data, a continuous maintenance and further development is necessary. Therefore, the inventoried data, except for the personal data, are required.

The recognition center is the central database used to store the inventory data provided by our customers in a consolidated manner. Only these data are used as basis for the signature catalog and the recognition rules. Regular software updates will ensure that you as a recognition customer will always have the most current version.

2.2 Data sources

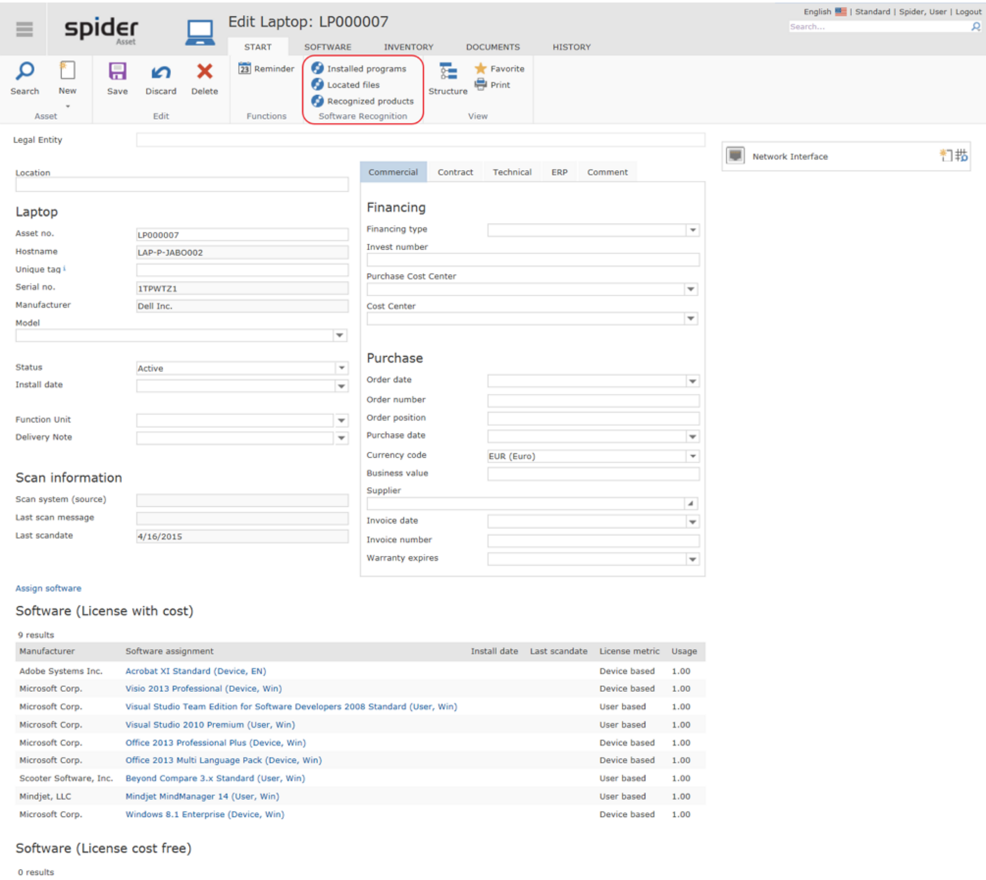
Most of the companies already use discovery and inventory systems which can determine the inventory data from the IT infrastructure (in the following called inventory system). Since the Spider software and license management is based on these inventory data, a regular data transfer from the installed inventory system must be ensured. Connectors for the most used systems are available and can be used for an easy setup of the interface to the used inventory system to ensure a safe operation. The delivered components and their functions are described in the following.



1. **Spider Data Collector**
   The Spider Data Collector collates the hardware and software inventory data as well as the metering data and transfers them every 24 hours to the software recognition as ZIP files.
2. **Connector**
   In order to take over inventory data from other third-party systems, the Spider Data Collector contains various connectors. For example: SCCM Connector, Discovery Connector, Heat Connector, LANDesk Connector, MAP Connector, etc.
3. **Columbus Inventory Scanner**
   Alternatively to the third-party inventory systems the inventory data can be entered by means of the Columbus Inventory Scanner and transferred to the Spider Data Collector.
4. **Columbus Inventory Agent**
   In addition to the inventory data, the Columbus Inventory Agent will also provide the values required for the software metering.
5. **Software recognition**
   The software recognition identifies the products requiring a license from the available inventory data based on file signatures and installed programs. In case of a unique identification, a complete recognition set is created, the information of which is used by Spider Asset to automatically create and assign the related objects. If no unique identification of the installed software version can be determined, e.g., if the language version of the installed software package is not available in the inventory data, the software recognition will offer all language versions of this software for manual selection. After the selection, the objects are automatically created and assigned in Spider Asset as described above.

2.3 Asset management

If Spider Asset is mainly used for the software management as described in the introduction, the software recognition will offer a high automation degree. The software recognition has the task to ensure the connection to the source systems, to analyze the inventory data, and to create the objects in Spider Asset for the corresponding mandator and to link it with the software version. If an asset has been created by the software recognition, it will always stay connected to the software recognition. In comparison with a manually created asset, the fields containing the basic data are write-protected, and the asset object has a *Software recognition* ribbon group which offers additional functions. **More details** (see "**Software recognition**" on page 92).



Of course, also these assets can be **enhanced** (see "**Edit assets**" on page 70) with additional information in the writable fields.

Manual detection and editing

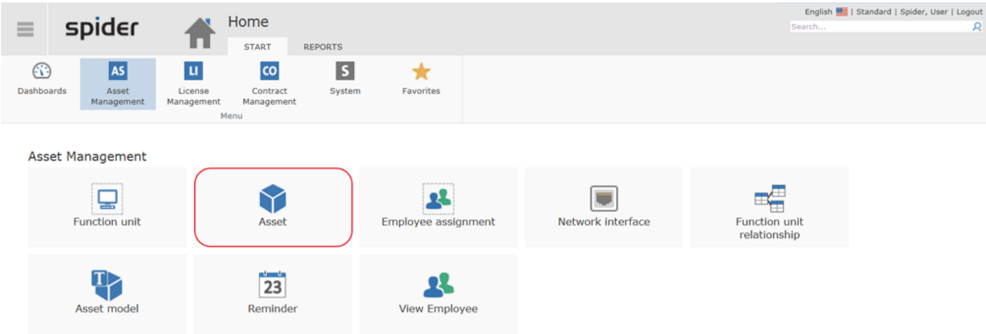
If the above-mentioned automatisms of the software recognition are not required or not desired, it is also possible to create and manage the assets manually. Furthermore, the assets created by the software recognition can be enhanced with additional information, such as commercial or organizational data.

An asset can either exist individually or in combination with other assets. For example, if several assets of a workplace (desktop, monitor, printer, etc.) must be combined, this can be done by assigning them to a function unit. The function unit forms a logical bracket around the objects of the workplace. The following chapters describe the individual forms and their function.

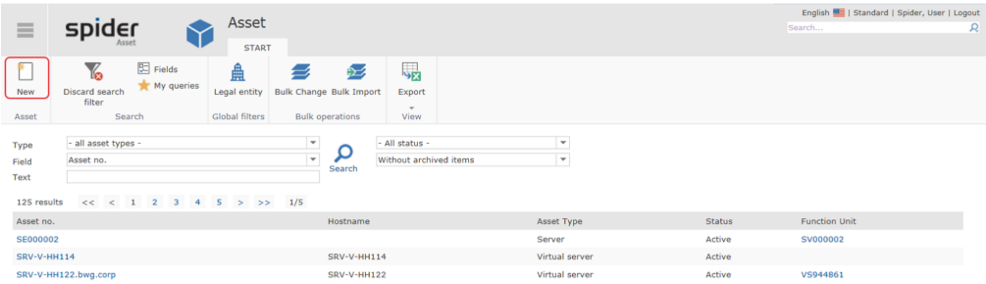
2.3.1 Create assets

If you have the required permissions, you can create new assets.

- Click on the menu item **Asset** in the menu area Asset Management on the home page or in the **Backstage** (on page 35) of Spider Asset.

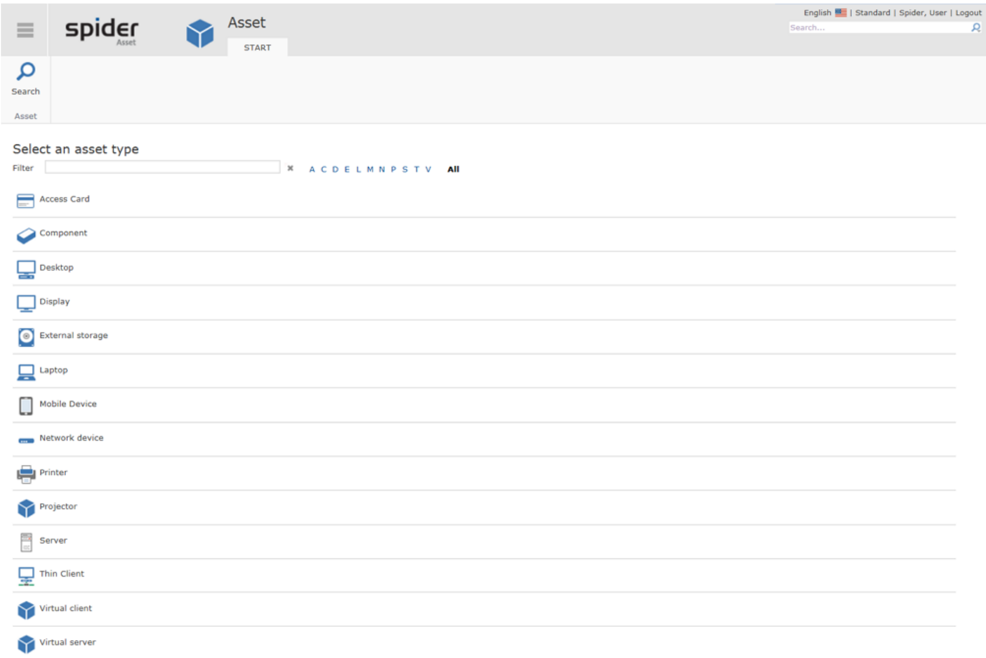


Depending on the assigned roles and role permissions, the entered assets are listed.



- To create a new asset, click on the **New** ribbon button in the Search form.

This will open the selection page with the available asset types.



Note	The available selection depends on the configuration and can vary according to the installation.

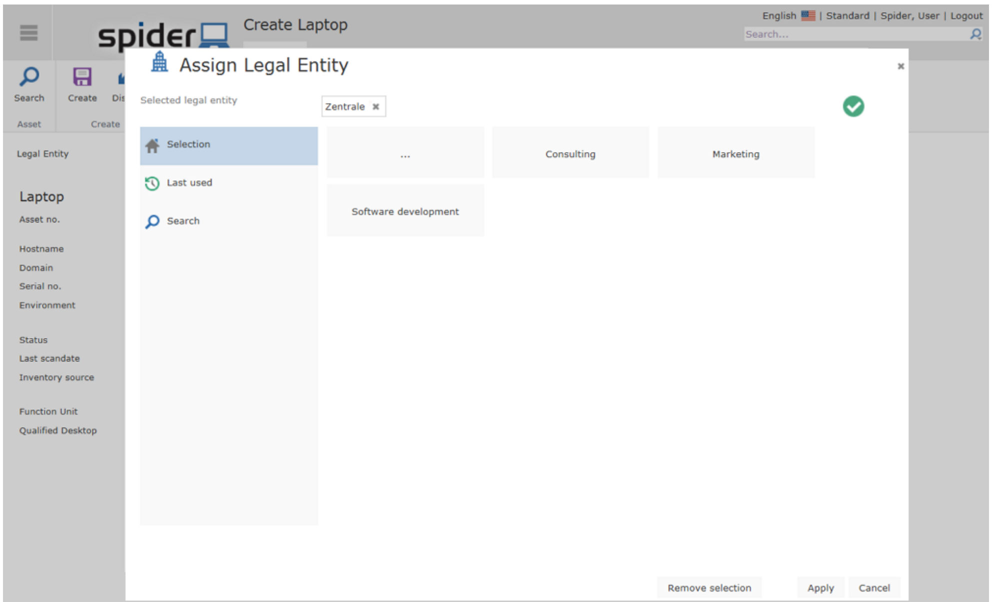
- Select the desired asset type to continue.

Important	Depending on the configuration and only in case of certain asset types, a function unit is created simultaneously with the asset, and the asset object will be allocated to this function unit. In the configuration, you can also determine which function unit type shall be created for the corresponding asset class. In the case of a laptop / desktop, the function unit type *Client system* is created by default.

Assign legal entity (optional)

Using legal entities enables you to **restrict** (see "**Assign legal entity**" on page 69) the access rights, evaluations, etc. to the organizational structures of a company.

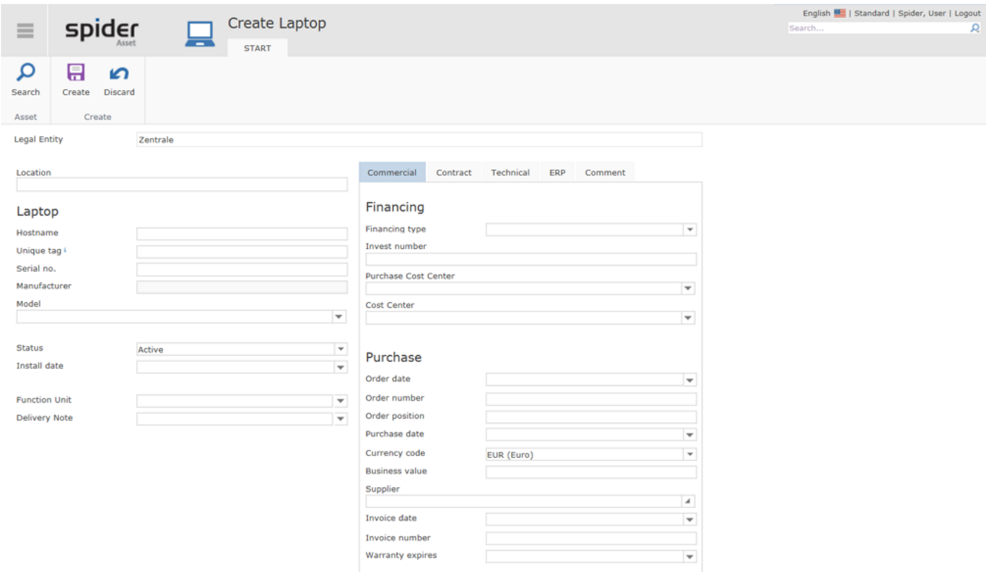
➢ The following step is optional. Spider allows you to assign a legal entity when you create a new asset. Select the corresponding legal entity and click on **Apply**.



➢ If you want to skip this step, click on **Cancel**.

Note The assignment of a legal entity can be executed later in the Edit form of an asset. Click into the **Legal entity** field.

After selecting an asset type and a possible assignment of a legal entity, the related Create form will open, such as e.g., for a laptop.



➢ Enter the asset data in the corresponding fields and click on the **Create** ribbon button to save your input.

Note The name of the model can be selected from the dropdown field. Please note that the model parameters are only taken over when a new asset is created. After that, they cannot be updated anymore if you modify the parameters of the model.

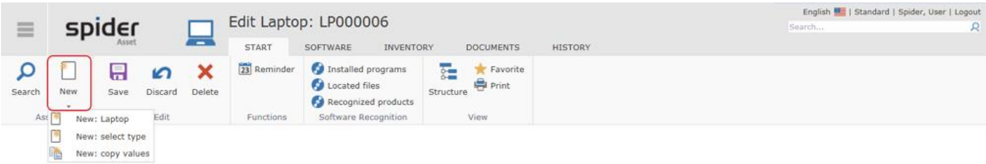
The asset number represents a unique identifier under which the asset data are saved. Depending on the configuration, the asset number is issued automatically or maintained manually.

If you have made changes which shall not be saved or if you want to completely reload the object, you can click on **Discard**.

Create from the Edit form

After the asset has been created, you have access to other functions in the Edit form of the asset. For example, you can create other assets in the Edit form of the asset.

➢ Click on the **New** ribbon button.

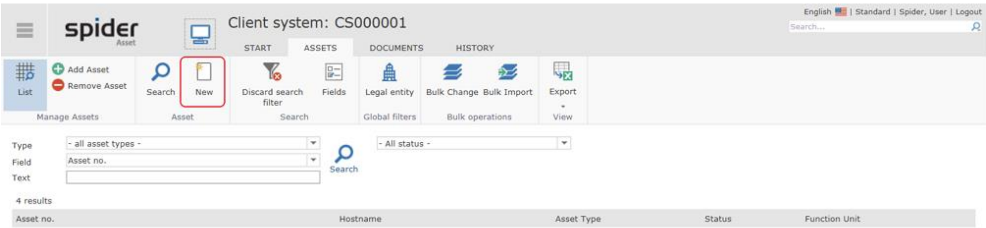


Note	Click on the arrow beneath the **New** ribbon button to be able to copy the asset type with or without values.

Create from a function unit

Alternatively, to the described variants, you can also create assets in the Edit form of any function unit.

➢ Go to the Asset ribbon in the Edit form of a function unit and click on the **New** button in the Asset ribbon group.



During this process, the new asset will automatically be assigned to the corresponding function unit.

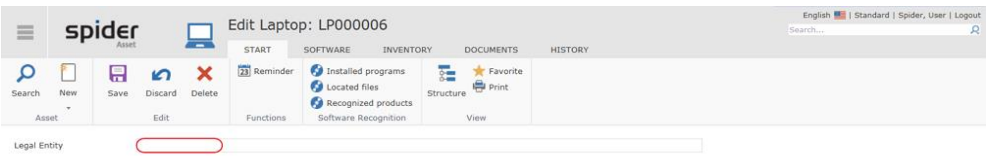
2.3.2 Assign legal entity

Users or roles have permissions for legal entities. That means that the access right is granted for a legal entity and all subordinated legal entities. This is like the permission in a file system. Contracts which have been assigned to a legal entity can only be viewed by users who possess a corresponding permission for this legal entity.

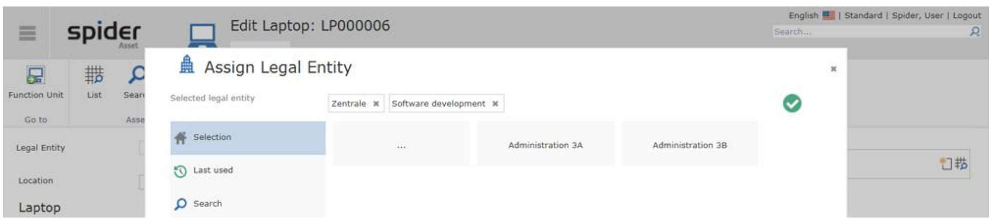
The legal entity can be selected directly when creating an asset or later. After creating an asset, the assignment of the legal entity can be modified at any time in the Edit form of the asset.

Note	A legal entity can only be assigned to the legal entity if the asset is not already assigned to a function unit. The assignment to a function unit will cause that its legal entity will be inherited by all subordinated assets.

➢ To assign an asset to a legal entity or to change the assignment, click in the **Legal entity** field.



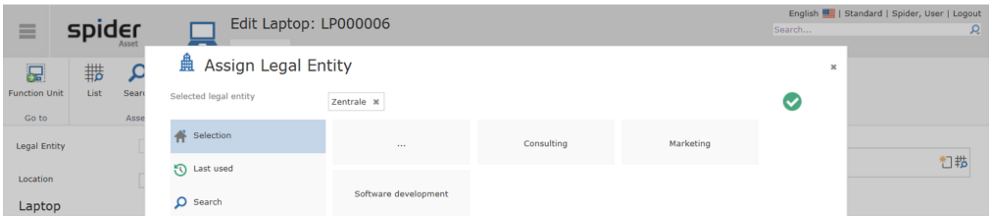
➢ Then you can select a legal entity or assign the recently used legal entities.



The path to the selected legal entity is displayed in the line *Selected legal entity*.

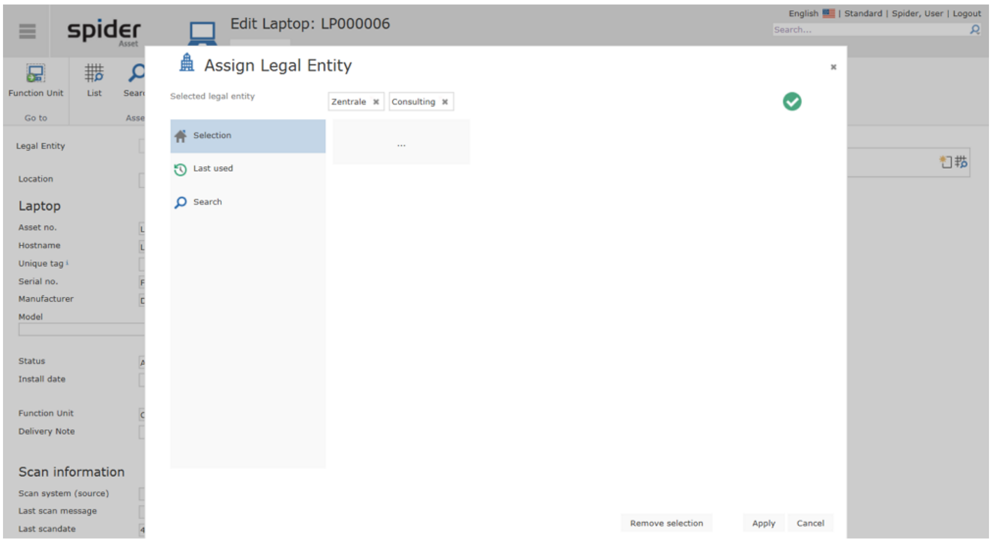
➢ If there are subordinated legal entities, they can be selected by clicking on the corresponding **tile**.

➢ By clicking on the **tile ...**, the higher level in the legal entity structure will open.



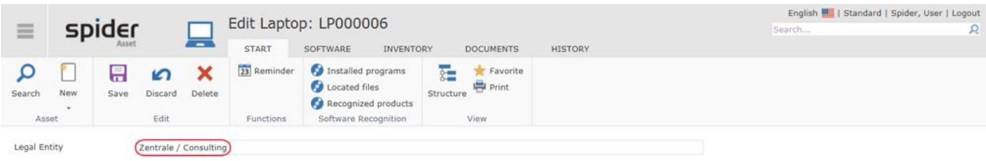
Note	The green tick confirms that a correct assignment is possible. If the user has no rights for a legal entity, he is not allowed to make an assignment (there is no green tick).

➢ Navigate through the structure and select the desired legal entity. For example, select legal entity *Consulting*.



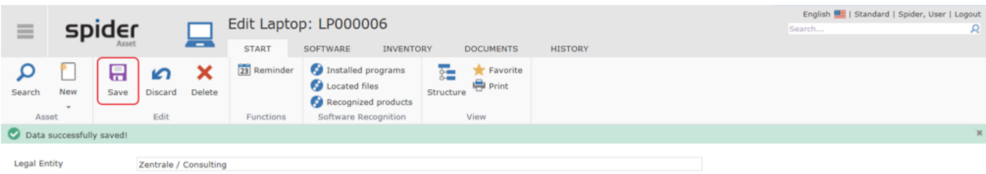
➢ Click on **Apply** to confirm your selection.

In the Edit form of the asset LP000006 the full path of the selected legal entity is shown.



Attention	The assignment is only completed successfully after saving the change also in the Edit form of the asset.

➢ Click on **Save** to complete the assignment.



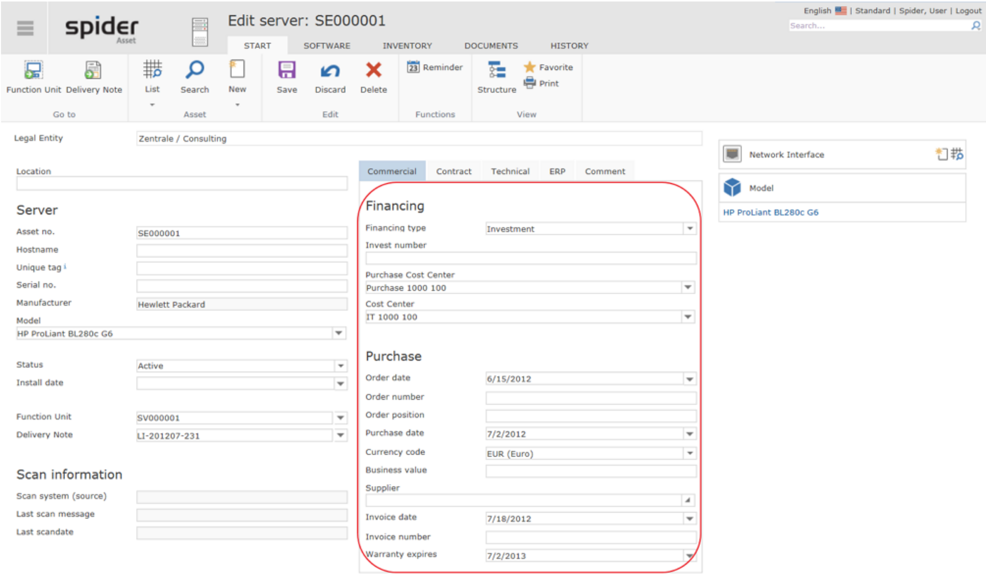
2.3.3 Edit assets

➢ On the home page of Spider Asset, go to the menu area *Asset management* or to the **Backstage** (on page 35) and click on the **Asset** menu item.

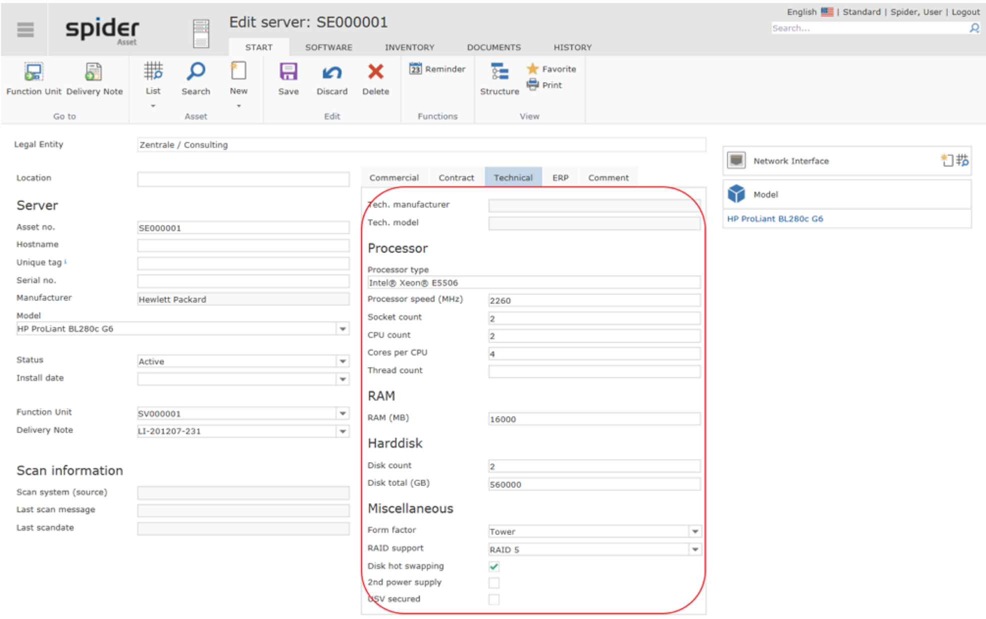
➢ Select the asset to be edited in the search form by clicking on the identifier.

After the Edit form of the corresponding asset has opened, you can edit all entries except the fields with a gray background.

If an asset already belongs to a legal entity, this is marked in the Edit form.



The Edit form offers various options in the *Commercial data* ribbon to enter the purchase data of an asset and post them to the corresponding cost centers.



All technically relevant data of an asset can be entered in the *Technical data* ribbon.

➢ After the change, click on the **Save** button to save your input. If you made no changes, you would receive a notification. If you have made changes which shall not be saved or if you want to completely reload the object, you can click on **Discard**. The asset will be reloaded and displayed.

The *ERP* ribbon often contains data from external systems which are delivered via interfaces.

If the module Spider Contract is used in addition to Spider Asset, the contract assignments will be entered in the *Contract* ribbon.

Asset status

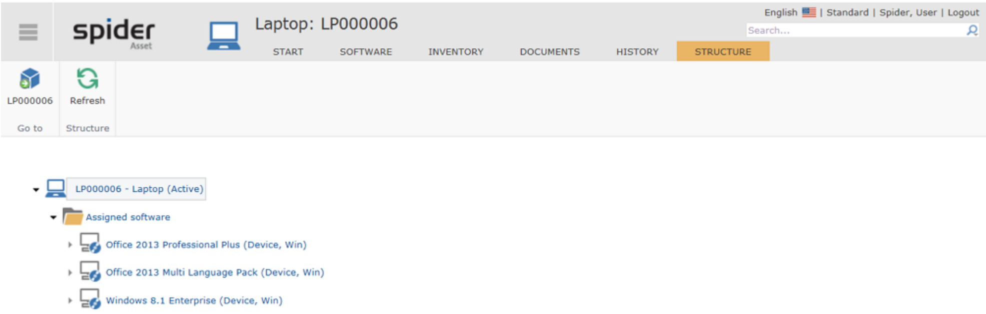
You can use the status to memorize the process status of the asset. The asset can be entered already in the order process, although the record at this time will only contain a few elementary data and is saved with the status *ordered*. If the asset is delivered, the record can be enhanced with more data and then saved with the status *Inventory*. When the asset is used for the first time, the status must be changed to *Usage*, etc.

Status sequences

Which states are available, and in which sequence they can be activated is depending on the operating processes of a company and can be configured in Spider Asset by using the Spider admin tool according to demand.

2.3.4 Structure view

➢ To view the structure of an asset, click on the **Structure** ribbon button in the Edit form of an asset.



The calling object is highlighted in gray in the structure. The structure view of the asset can be adapted by showing or hiding the branches of the indicated fields.

2.3.5 Navigation

The ribbon offers you the following navigation options:

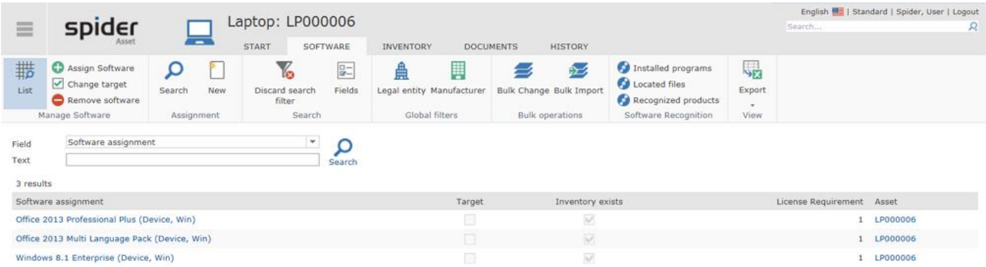
Ribbon group	Ribbon button	Function
Go to	Function unit	Navigates directly to the related function unit. This ribbon group is only shown if the asset is assigned to a function unit.
Asset	List	All assets of the related function unit are listed. This button is only shown if the asset is assigned to a function unit.
	Search	Navigates to the search across all assets.
	New *	A new asset can be created.
View	Structure	You can go directly from the Edit form to the structure view. Click on Structure in the View ribbon group. The structure view shows all asset objects and allows for a quick navigation within the structure view.

* If you click on the small triangle below the **New** ribbon button, you have the possibility to create a new asset of the same type with or without accepting the field contents. Alternatively, a new type can be selected.

Note If the asset has been created by software recognition, more functions are **available** (see "**Software recognition**" on page 92) in the *Software Recognition* ribbon group.

2.3.6 Manage software of the asset

➢ In the Edit form of an asset, navigate to the *Software* ribbon.



In the Software management ribbon group, you can use the buttons **Add software**, **Remove software,** or **Change target** to manage the software at the affected asset.

The related software is listed, and column 2 specifies whether the software is belonging to the target inventory or not. Should the software also exist in the inventory system, this will also be shown in the 3rd column.

Further details to the topic **software management** (see "**Create software assignments to assets or function units**" on page 126).

2.3.7 Asset templates

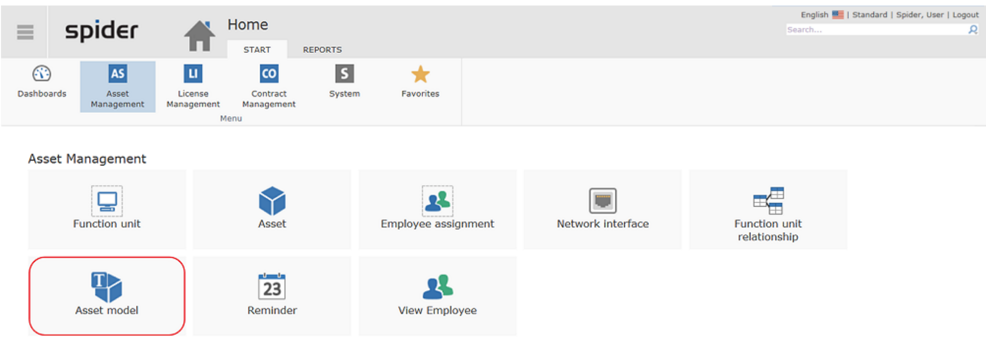
The more detailed identification of each device includes a template identifier. To prevent using various template names for the same template in Spider Asset (e.g., *Cpq 2000* and *Compaq 2000*), a centralized template management has been set up. Apart from the template identifier, also technical data such as the screen size, format, max. resolution, etc. can be saved under the template, which then will be automatically taken over when creating an asset.

Attention	Asset templates are not maintained by the software recognition, and they are not considered when creating an asset.

Create asset templates

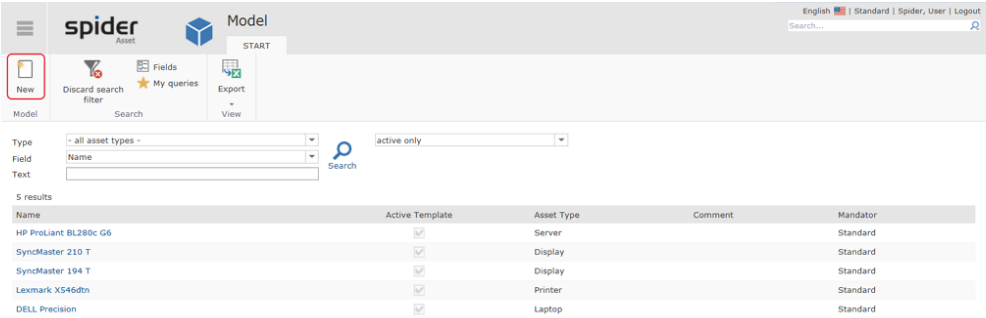
If you have the required rights, you can create new asset templates.

➢ On the home page of Spider Asset, go to the menu area *Asset management* or to the **Backstage** (on page 35) and click on the **Asset model** menu item.

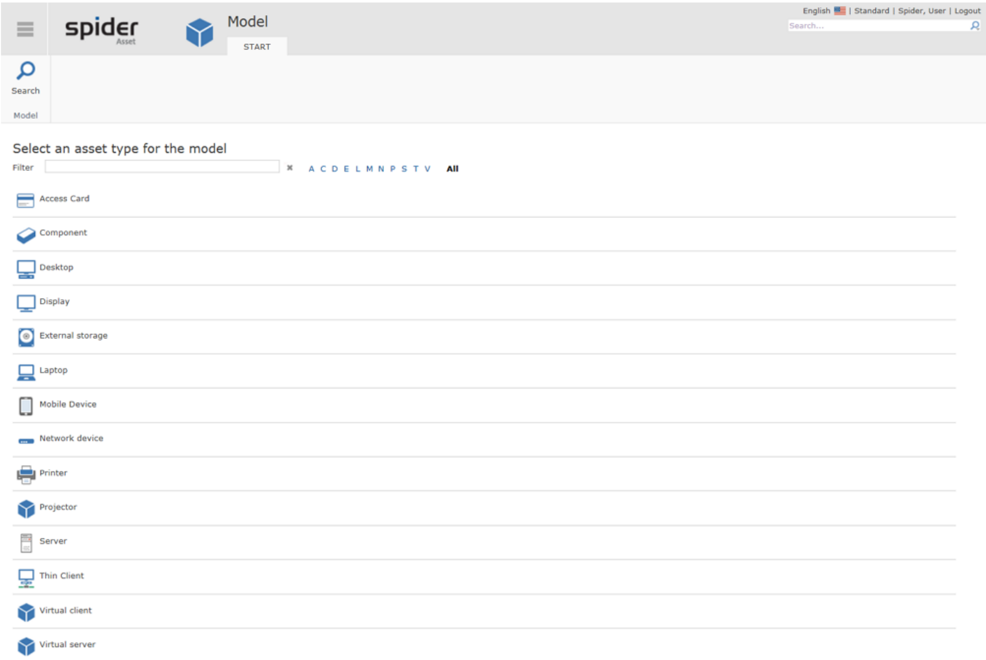


In the Search, the existing templates are listed.

➢ To create a new template, click on the **New** ribbon button.



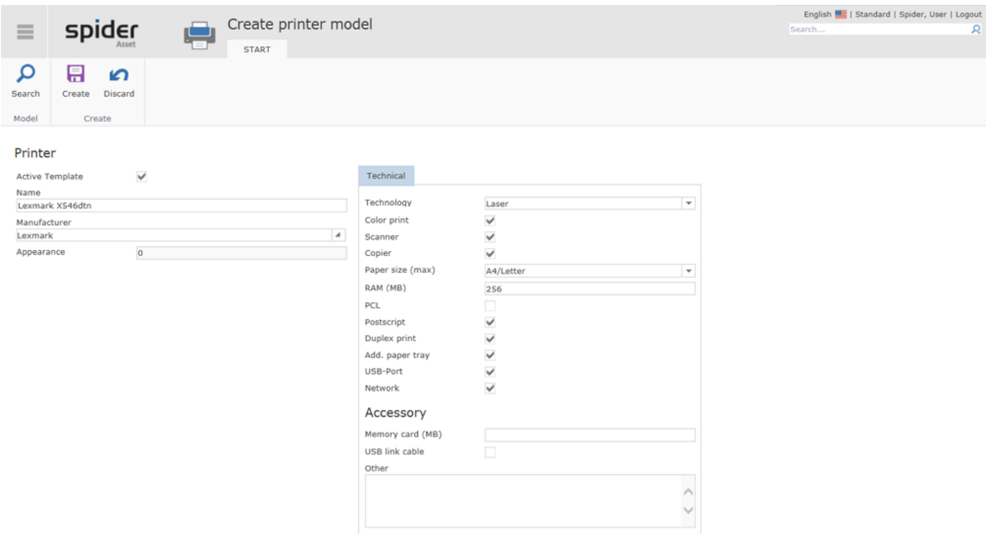
Then the selection page with the available asset types will open. Select the desired asset type to proceed.



Note	The selection page can vary depending on the installation.

After selecting an asset type, the corresponding create page will open as shown in the following example for a printer model.

Use the **Name** input field to enter the name or the identifier of the asset template. The name conventions comply with the specifications of your company. The creation of different templates can be repeated without limit.



The data fields which must be filled in are marked as mandatory fields. The general technical data of an asset template are entered in the section "Tech. data". When creating an asset, these data are taken over. If the data are changed later in the asset form, this has no effect on the template. Later changes on the template have also no effect on the entered assets.

➢ To save the data, click on the **Create** ribbon button.

If you have made changes which shall not be saved or if you want to completely reload the object, you can click on **Cancel.**

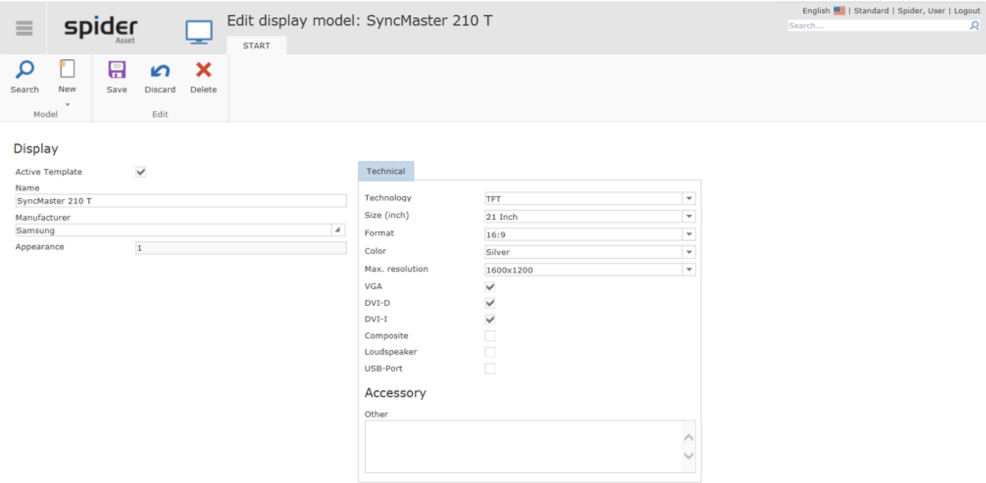
Note	Alternatively to the above-described process, you can also create a new asset template in the Edit form of an existing template.

➢ Click on the **New** ribbon button in the Edit form of an existing asset template.

Note	If you click on the arrow below the **New** ribbon button, you have the option to copy the asset tem-plate either with or without values.

Edit asset templates

You can enter the data in various fields which either allows for a selection or a direct input.



After editing the data, click on the button **Save**, to save your entered data.

If you have made changes which shall not be saved or if you want to completely reload the object, you can click on **Discard**. The page will be reloaded.

Note	Changes of the asset template have no effect on existing asset objects.

2.4 Function units

A function unit is used to combine and manage assets, software, and employees in one logical unit (e.g., workplace). Depending on the configuration, other assignments are available. Furthermore, complex structures can be mapped by establishing logical relations among the function units.

2.4.1 Create function units

Function units can be created manually or indirectly by creating an asset.

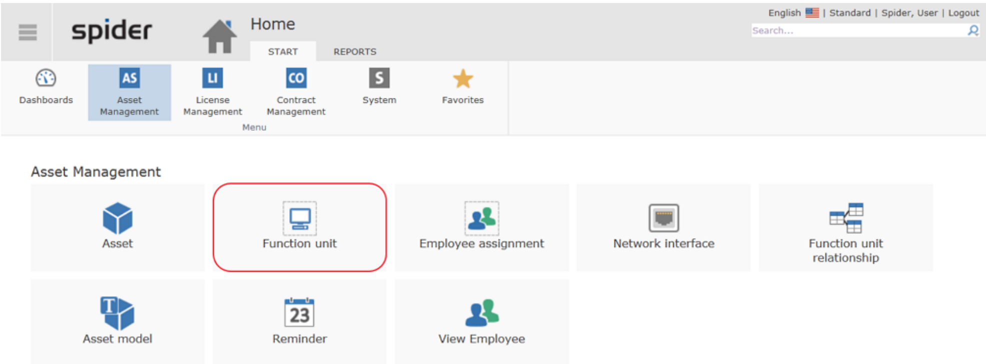
Automatic creation of function units

Depending on the configuration and only in case of certain asset types, a function unit is created simultaneously with the asset, and the asset object will be **allocated** (see "**Create assets**" on page 66) to this function unit. This function is required by the **Software recognition** (on page 92) as pre-condition for the synchronization of the *Function Unit Relationships* or the *Function Unit Employees*.

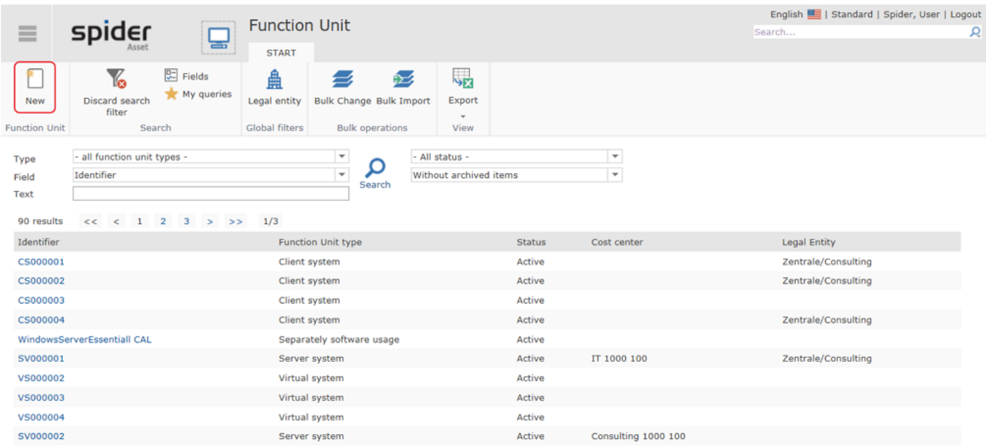
Manual creation of a function unit

If you have the required permissions, you can create new function units.

➢ On the home page of Spider Asset, go to the menu area *Asset management* or to the **Backstage** (on page 35) and select the **Function unit** menu item.

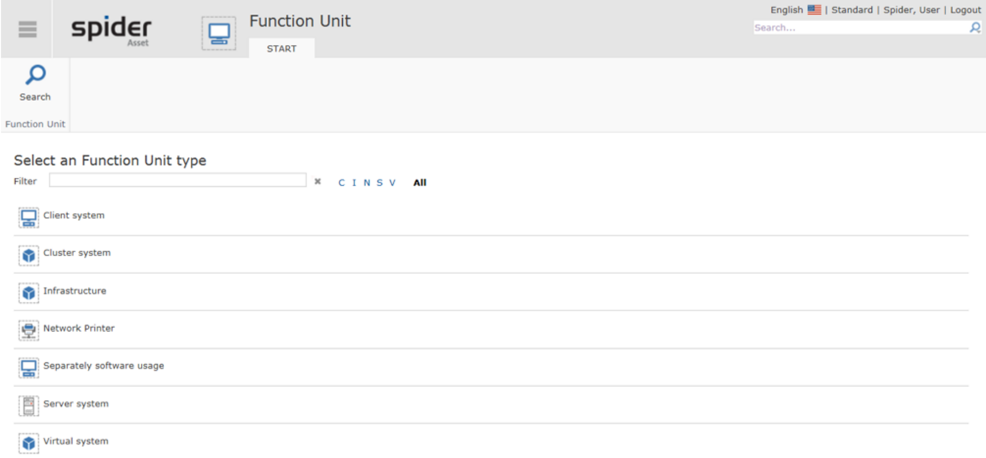


This will show a list of already existing function units.



➢ To create a new function unit, click on the **New** ribbon button in the Search form.

The selection page with the available function unit types will open.



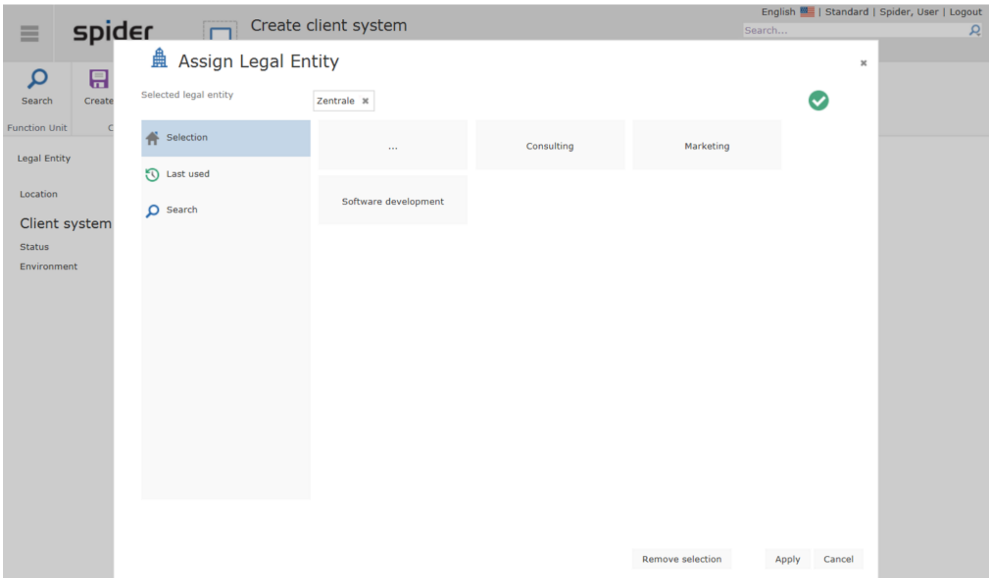
➢ Select a function unit type to continue.

Note	This selection page can vary depending on the installation.

Assign legal entity (optional)

Using legal entities enables you to **restrict** (see "**Assign legal entity**" on page 69) the access rights, evaluations, etc. to the organizational structures of a company.

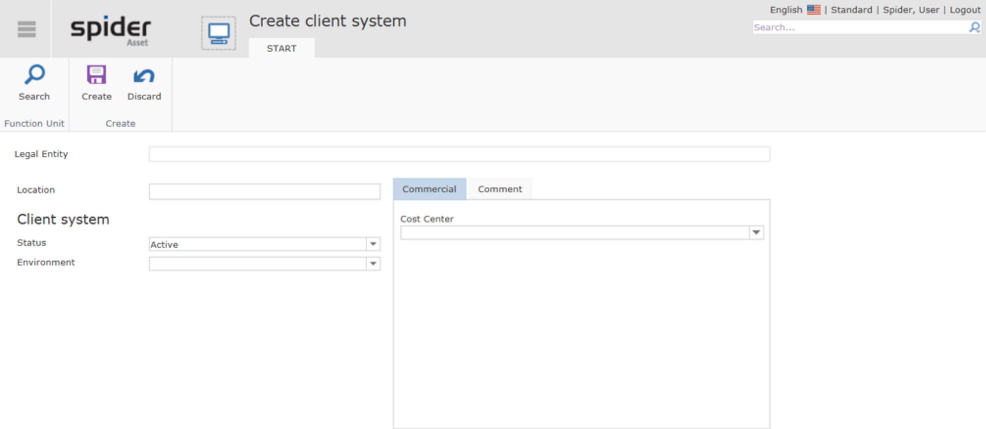
➢ The following step is optional. Spider allows you to assign a legal entity when you create a new function unit. Select the corresponding legal entity and click on **Accept**.



➢ If you want to skip this step, click on **Cancel**.

Note	The assignment of a legal entity can be executed later in the Edit form of the function unit by clicking into the **Legal entity** field.

After selecting the desired function unit types, the corresponding Create page will open.



➢ Enter the data and click on the **Create** ribbon button to save your input.

➢ If you have entered data which shall not be saved or if you want to reload the object, you can click on **Cancel**.

Note	Alternatively to the above-described process, you can also create a new function unit in the Edit form of an existing function unit.

➢ Click on the **New** ribbon button in the Edit form.

Note	Click on the arrow beneath the **New** ribbon button to be able to copy the function unit with or without values.

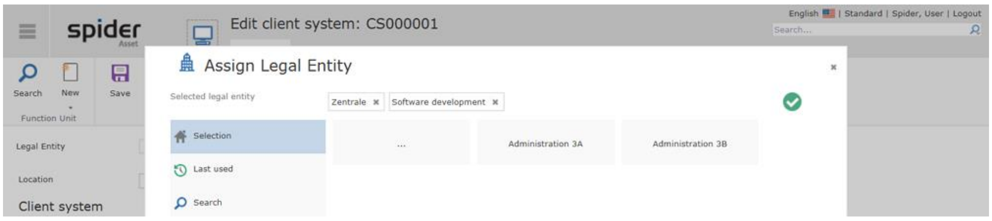
The rest of the process corresponds to the description above.

2.4.2 Assign legal entity

Like assets, also function units can be assigned to a legal entity.

➢ To assign a function unit to a legal entity or to change the assignment, click in the **Legal entity** field.

➢ Then you can select a legal entity or assign the recently used legal entities.



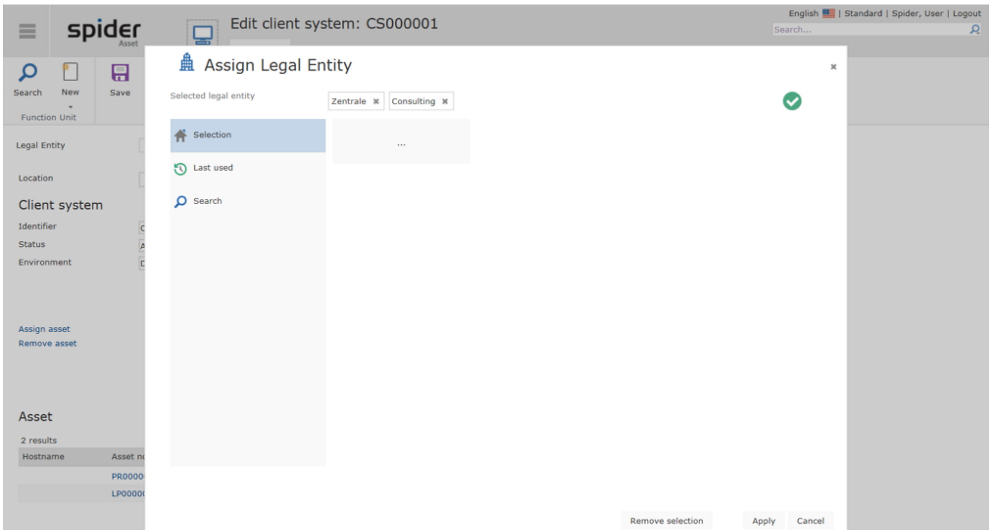
The path to the selected legal entity is displayed in the line *Selected legal entity*.

➢ If there are subordinated legal entities, they can be selected by clicking on the corresponding **tile**.

➢ By clicking on the **tile ...**, the higher level in the legal entity structure will open.

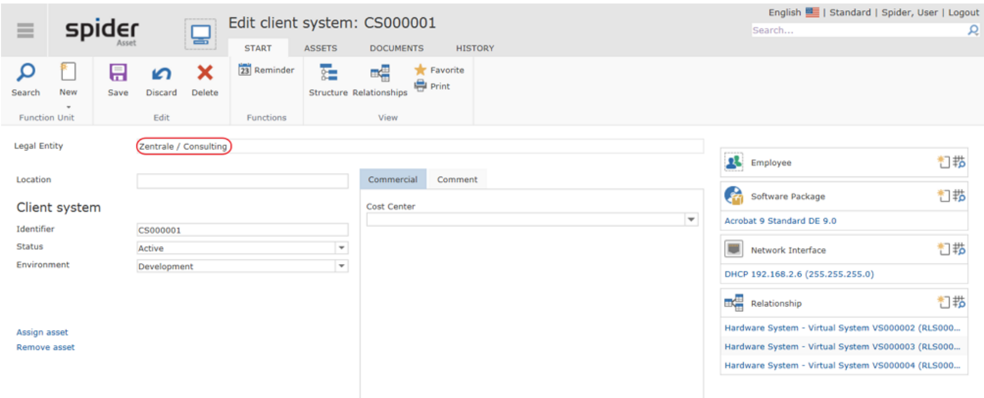
Note	The green tick confirms that a correct assignment is possible. If the user has no rights for a legal entity, he is not allowed to make an assignment (there is no green tick).

➢ Navigate through the structure and select the desired legal entity. For example, select legal entity *Consulting*.



➢ Click on **Apply** to confirm your selection.

In the Edit form of the function unit, the complete path of the corresponding legal entity is shown.



Attention	The assignment is only completed successfully after saving the change also in the Edit form of the function unit.

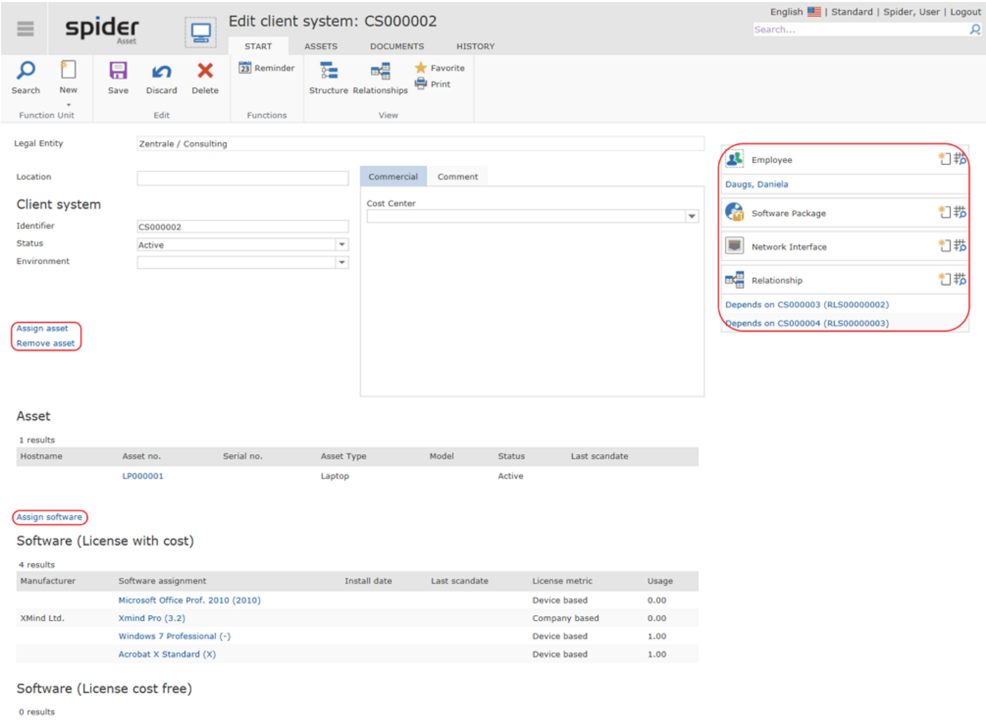
➢ Click on **Save** to complete the assignment.

Note	The assignment of a function unit to a legal entity is inherited by the subordinated assets of this function unit.

2.4.3 Edit function units

After creating the function unit, you can assign objects. This includes the adding of employees, software, software packages, network interfaces or relations. This is done by using the **New** icons in the *Object lister*.

Based on the Edit form of a function unit, asset and software assignments can be made either via the ribbons Asset and Software or via the links *Asset* resp. *Software* (depending on the configuration).



- After editing the data, click on the **Save** ribbon button to save your entered data. If you made no changes, you would receive a notification.
- If you have made changes which shall not be saved or if you want to completely reload the object, you can click on **Discard**. The function unit will be reloaded and displayed.

Note If a function unit already belongs to a legal entity, this is marked in the Edit form.

Status

As for the asset, you can use the status to memorize the process status which the function unit **has** (see "**Asset status**" on page 71).

2.4.4 Structure view

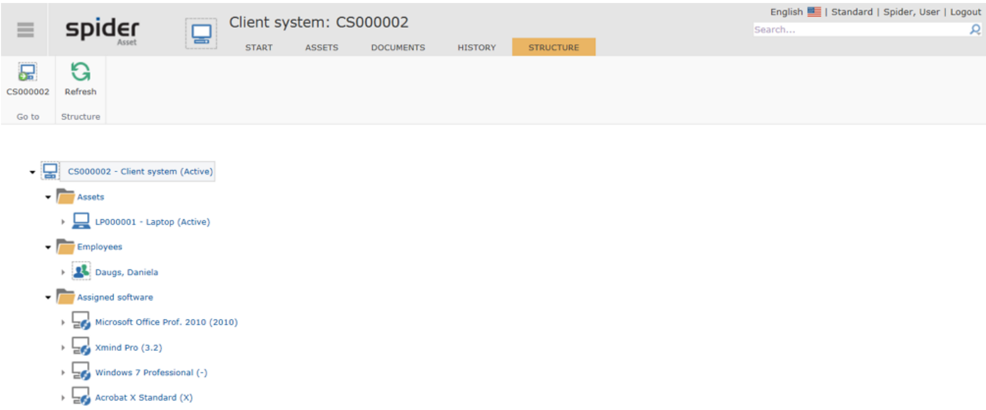
The function unit tree shows the nested structure of a function unit. It can be called from the Edit forms of the following objects:

- Function unit
- Asset
- Employee assignment
- Software assignment
- Network interface

➢ To show the structure of a function unit, click on the **Structure** ribbon button.

The following object relations are shown in the function unit tree:

- Subordinated assets, grouped by type.
- Assigned employees per each function unit.
- Assigned network interfaces per each function unit.
- Assigned software per each function unit.



The calling object is highlighted in gray in the structure. The structure view of the function unit can be adapted by showing or hiding the branches of the indicated fields.

Within the function unit tree, you can navigate to each element.

2.4.5 Navigation

The ribbon offers you the following navigation options:

Ribbon group	Ribbon button	Function
Function unit	Search	Navigates to the search across all function units.
	New *	A new function unit can be created.
View	Structure	You can go directly from the Edit form to the structure view. Click on Structure in the View ribbon group. The structure view shows all function unit objects and allows for a quick navigation within the structure view.
	Relations	Existing relations to other function units are shown in a graphical view.

* If you click on the small triangle below the **New** ribbon button, you have the possibility to create a new function unit of the same type with or without taking over the field contents. Alternatively, a new type can be selected.

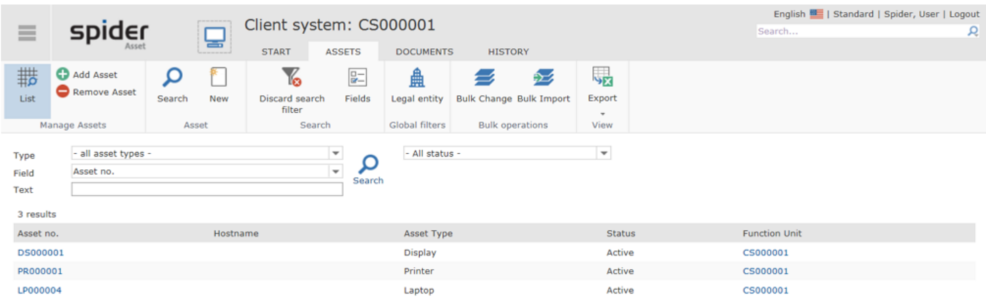
2.4.6 Asset assignment

In principle, all existing assets, which are not yet assigned to a function unit, are available for the as-signment.

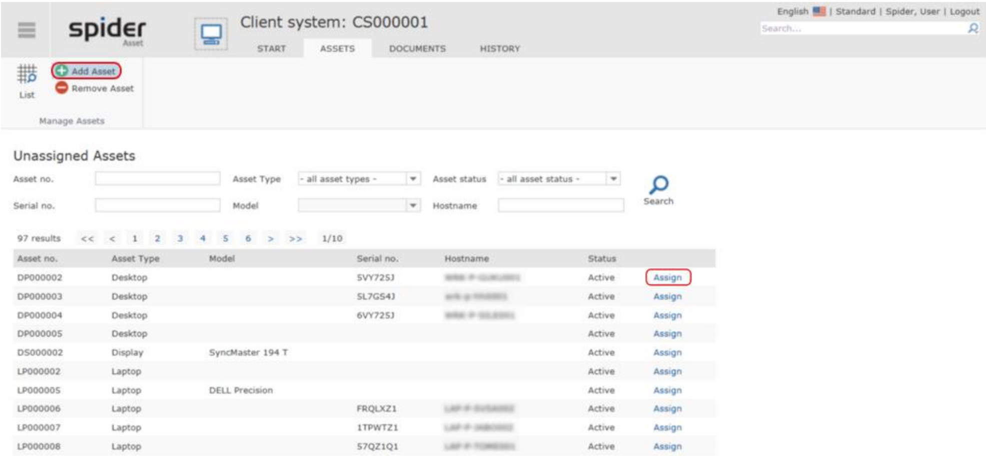
Create asset assignment

The assignment is executed in the Edit form of the function unit.

- On the home page of Spider Asset, go to the menu area *Asset management* or to the **Backstage** (on page 35) and select the **Function unit** menu item.
- Select from the list of function units the function unit which you want to assign assets to.
- In the Edit form of the function unit, navigate to the *Assets* ribbon.

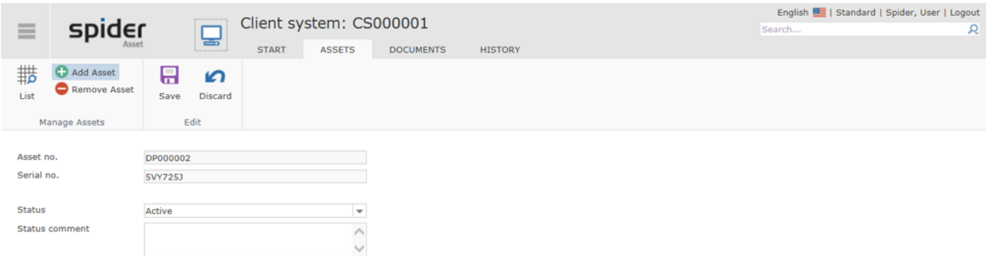


➢ Click on the **Add asset** ribbon button.



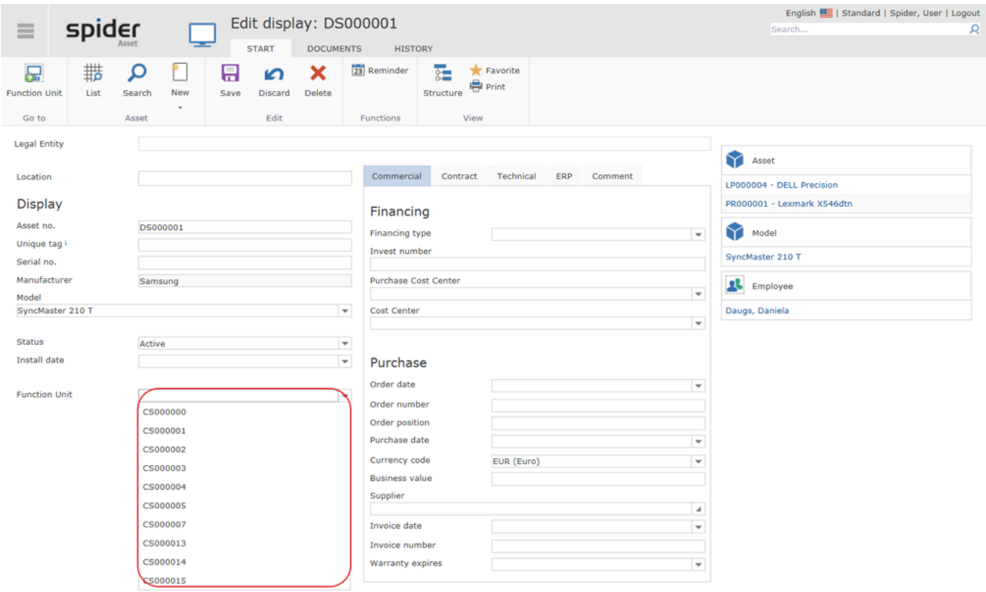
All assets are listed which are not assigned to a function unit, yet.

➢ Click on **Assign** at the desired asset and then on **Save** or **Cancel** if you do not want any assignment.



Note	Alternatively to the described process, an assignment can also be made from the asset.

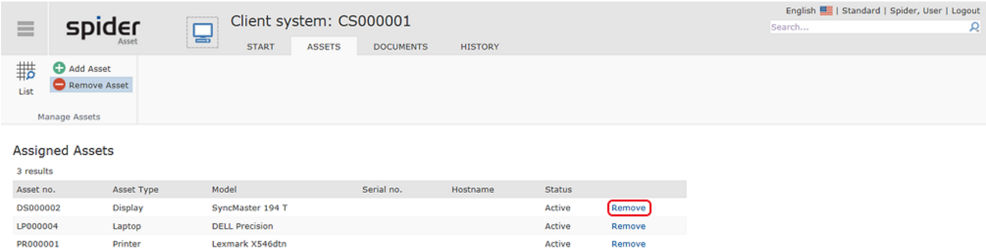
➢ Select the desired function unit in the Edit form of the asset and click on the Save ribbon button.



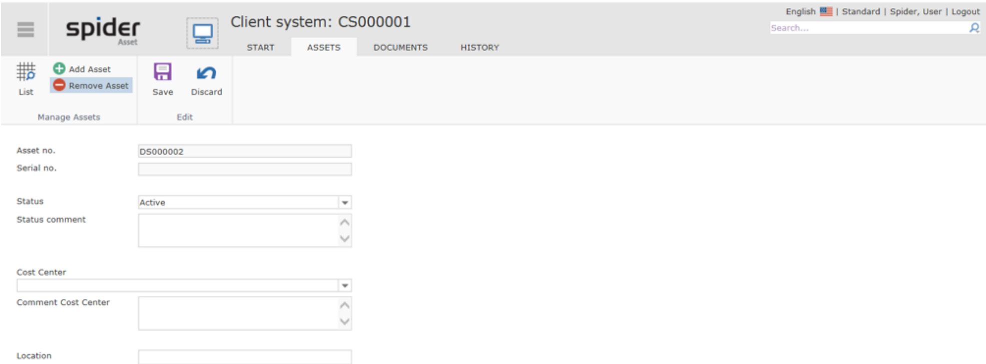
In the following message you are notified that certain data of the function unit were inherited by the subordinated asset.

Release asset assignment

- On the home page of Spider Asset, go to the menu area *Asset management* or to the **Backstage** (on page 35) and select the **Function unit** menu item.
- Select the function unit from the list of function units for which you want to edit the asset assignment.
- In the Edit form of the function unit, navigate to the *Assets* ribbon and select the **Remove asset** function in the Manage Assets ribbon group.



- Select the asset which is to be released from the function unit and click on **Remove** and then on **Save** or **Discard** if the assignment shall remain active.



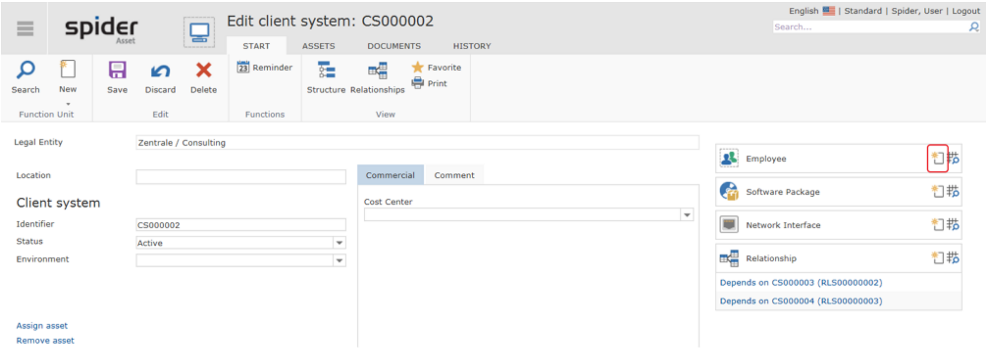
Note	Assets which are released from the function unit are not deleted.

2.4.7 Employee assignments

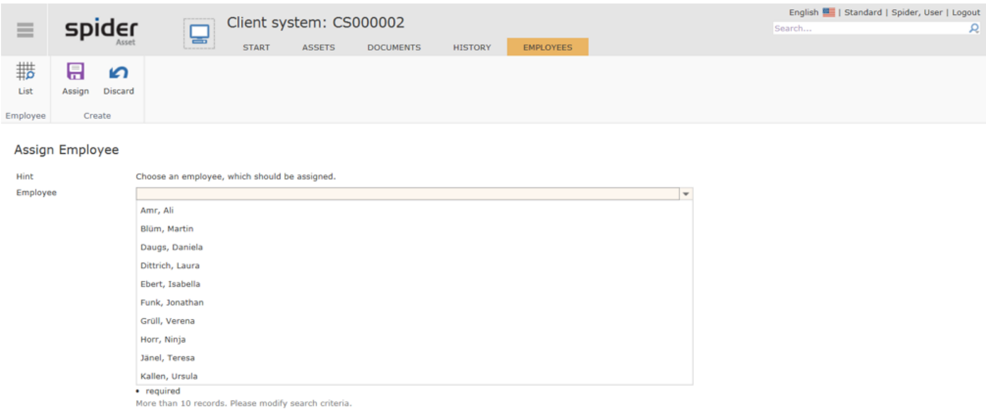
Use the employee assignment to administer employees at the function unit.

Create employee assignments

To create an employee assignment, click on the *New* symbol in the **Employees of the function unit** object lister.



In the next window, you can select the employee from the drop-down list.

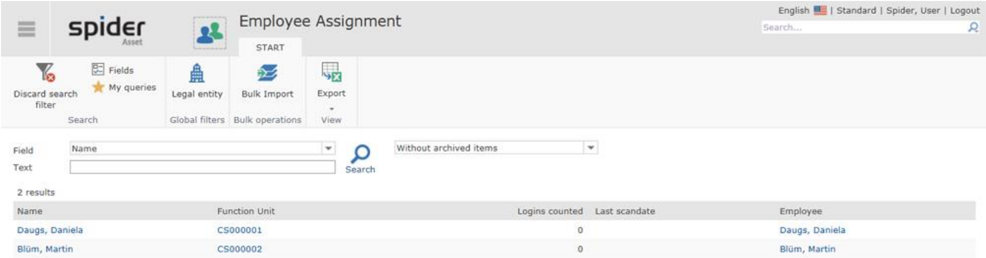


After having made your selection, click on the **Assign** ribbon button. Now you can see the employee assignment with the data of the employee.

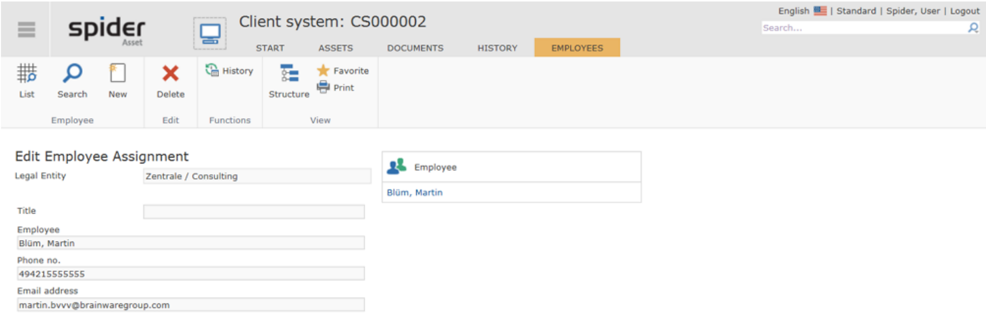
Note	If you close the form without clicking on the **Assign** ribbon button, your entries will be lost.

Edit the employee assignment

➢ On the home page of Spider Asset, go to the menu area *Asset Management* or to the **Backstage** (on page 35) and click on the **Employee Assignment** menu item.



➢ Select in the Search form the *employee assignment* to be edited by clicking on the corresponding employee in the **Name** column.

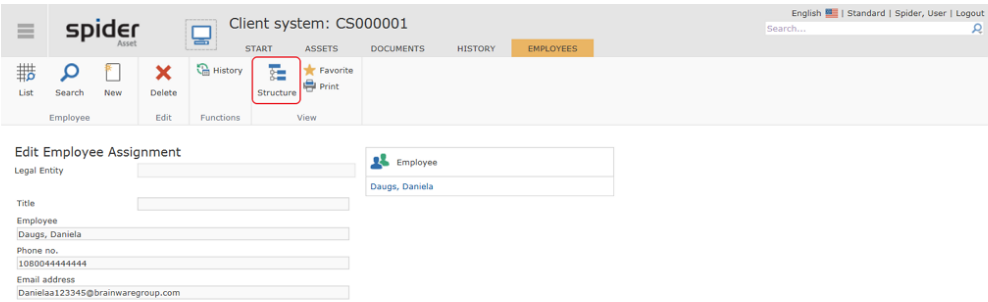


Here, you can also delete an existing assignment or create a new one.

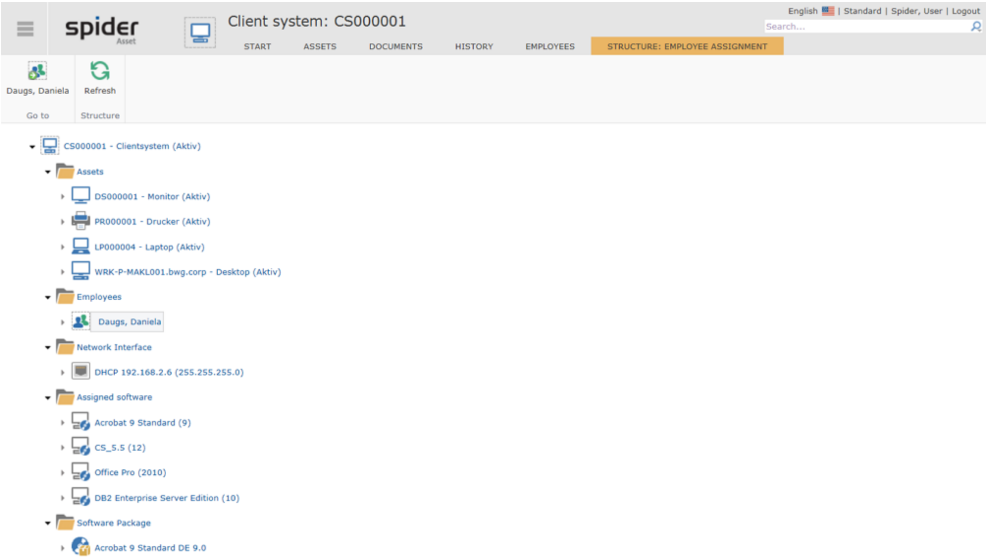
Note	Alternatively to the way described above, the employee assignment can also be reached via the object lister of the Edit form of a function unit (depending on the configuration).

Function unit tree

To view the structure of a function unit with the employee assignment, click on the **Structure** ribbon button in the *Edit employee assignment* form.



The complete structure where the employee is located is shown.



The calling object is highlighted in gray in the structure.

2.4.8 Manage relationships

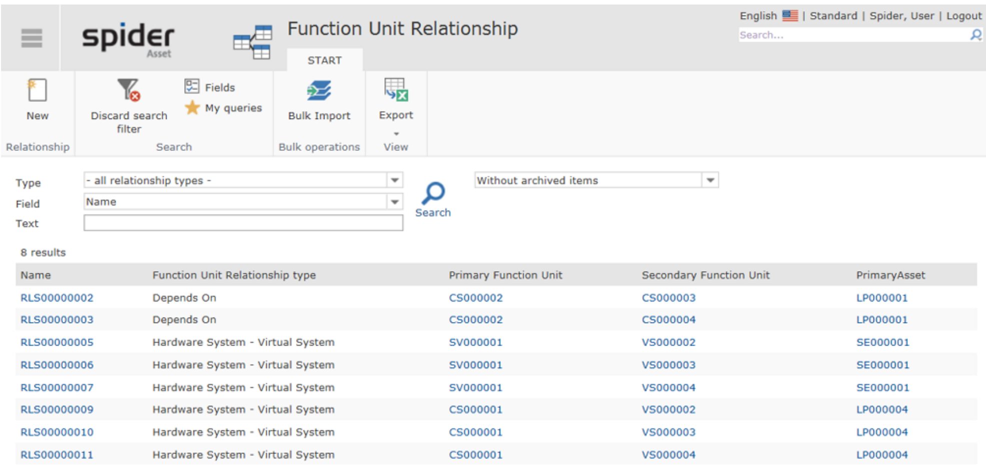
Using the **Relationship** object, you can establish relationships among function units. The relationship can be seen as a directional edge which connects a primary with a secondary function unit.

In the standard configuration of Spider Asset, you may select among different types of relationships.

Create relationships

If you have the required permissions, you can create function unit relationships.

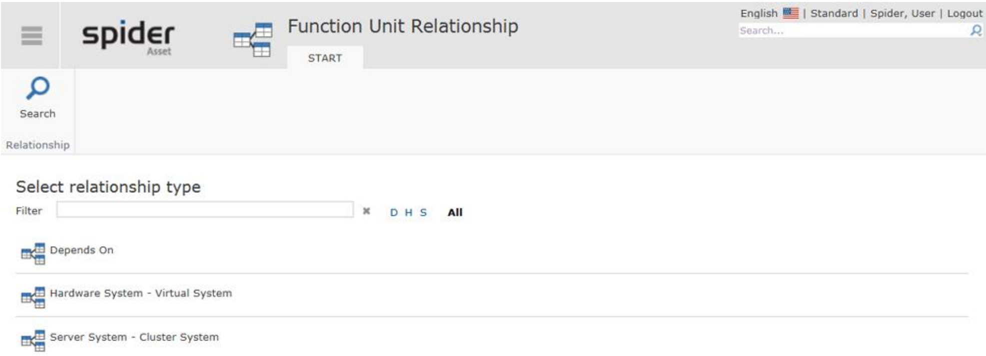
- On the home page of Spider Asset, go to the menu area *Asset management* or to the **Backstage** (on page 35) and select the **Relationships** menu item.



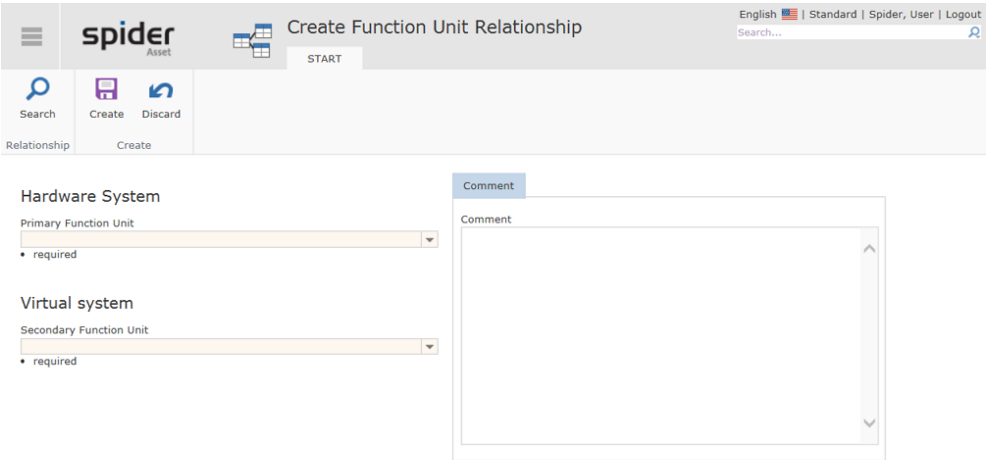
- To create a new relationship, click on the **New** ribbon button in the Search form.

Then the selection page with the available relationship types will open.

➢ Please select the desired type from the list.



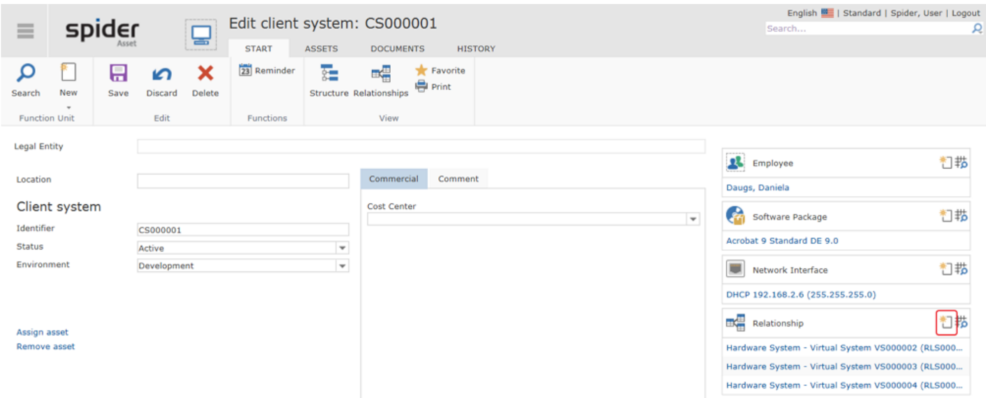
Note	This selection page can vary depending on the installation.



➢ Fill in the mandatory fields and click on the **Create** ribbon button to save your input.

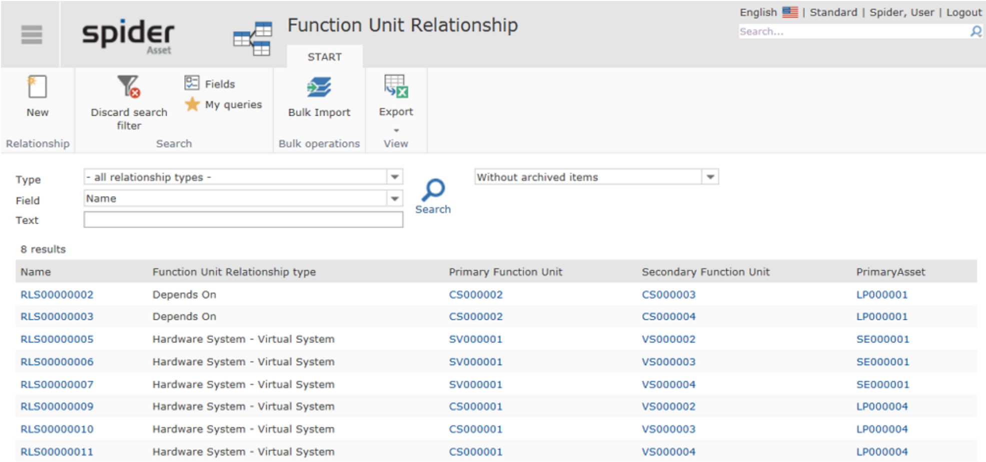
If you have made changes which shall not be saved or if you want to completely reload the object, you can click on **Cancel**.

Note	Alternatively to the procedure described above, you can also create a function unit relationship via the object lister in the Edit form of the function unit (depending on the configuration).

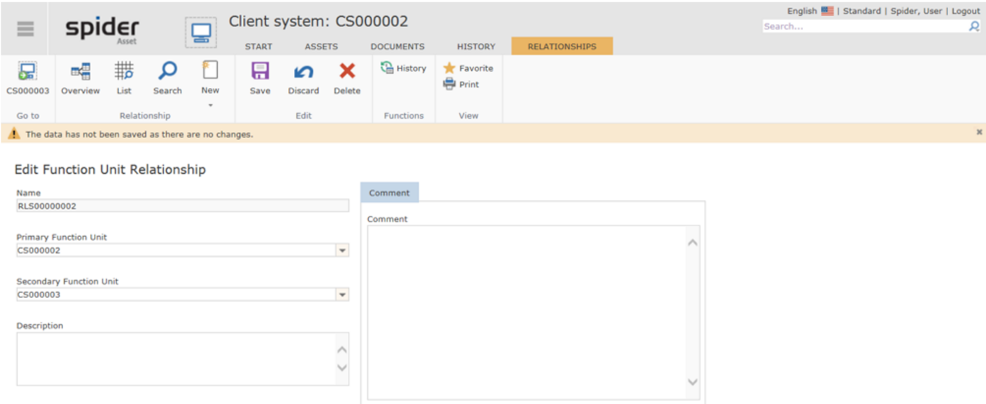


Edit relationships

➢ On the home page of Spider Asset, go to the menu area *Asset management* or to the **Backstage** (on page 35) and select the **Relationships** menu item.



➢ Click on the **Identifier** of the desired relationship in the Name column.



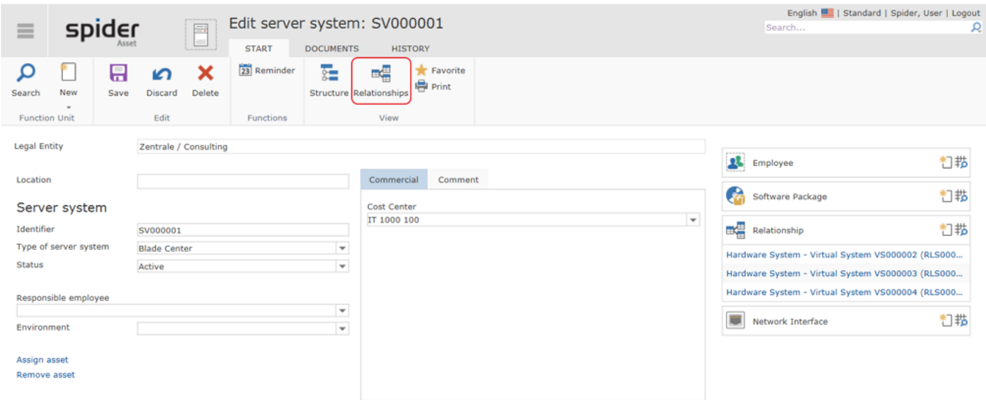
➢ After the change, click on the **Save** ribbon button to save your input. A note will be shown if you have changed nothing.

If you have made changes which shall not be saved or if you want to completely reload the object, you can click on **Cancel**. The function unit relationship will be reloaded and displayed.

Visualization of relation

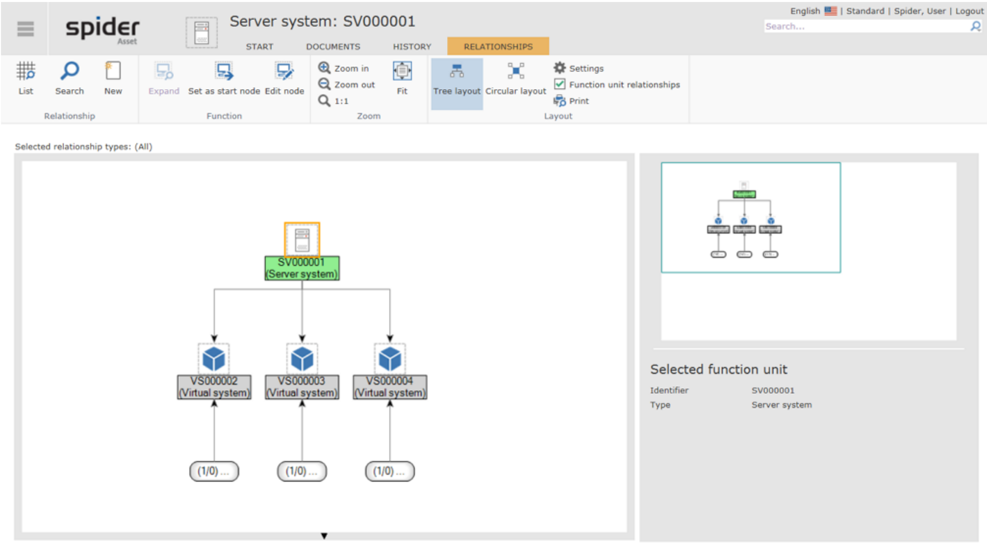
There is also the possibility to show the function units in graphical form.

➢ In the Edit form of a function unit, click on the **Relationships** button in the *View* ribbon group.

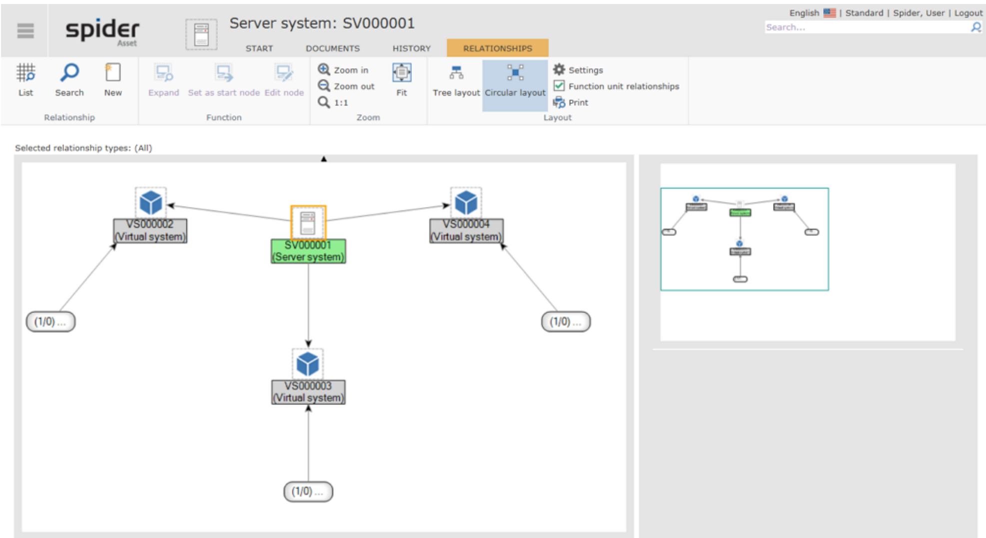


The stored relations can be shown either in a tree view or as a circular view.

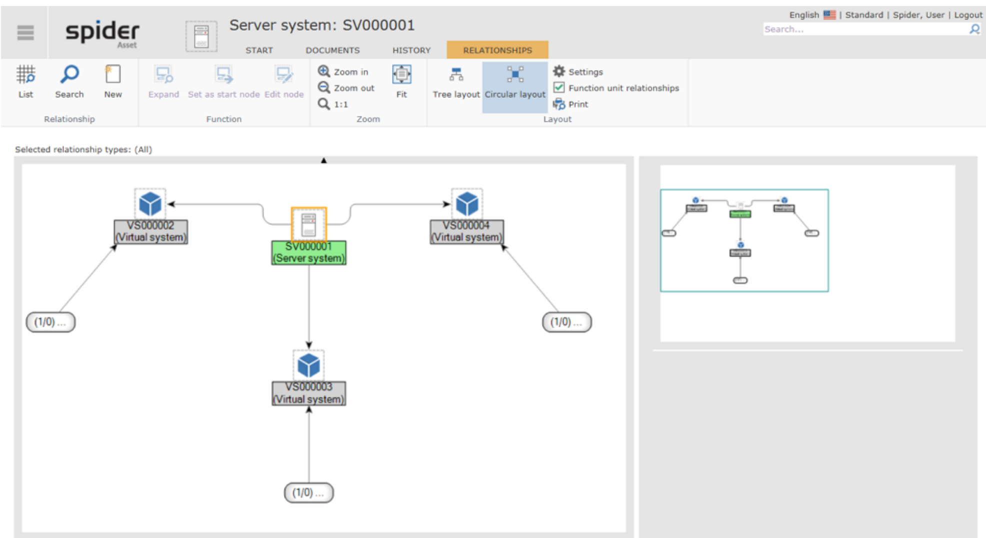
Tree layout



Circular layout



➢ By clicking again on the **Circular layout** ribbon button, the relations are shown in the following way.



2.5 Software Services

The software recognition has the task to identify the software requiring a license within an IT environment. As **described** (see "**Data sources**" on page 65) above, the raw data are transferred from the multiple inventory systems to the software recognition. The actual identification is done in a process, in which the raw data are compared with the signatures of the software recognition. Based on this identification, the installed software products are classified, and the objects *Asset* and *Software* are automatically created in Spider Asset. In the ideal case, i.e., if all information from the inventory data could be determined, also the assignment of the correct product version is done automatically by the software recognition.

If online portals are connected via appropriate connectors, they provide information about subscriptions and accounts. Software Recognition associates subscriptions with software and accounts with existing employees. If both can be clearly assigned, a software assignment is made automatically at the employee.

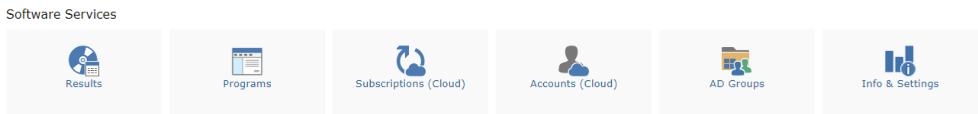
If this raw data also includes information from an Active Directory, employees can be created from users and assets from computer objects. By manually assigning software to an AD group, these employees or computer objects automatically receive individual software assignments in Spider. Remote use can also be defined here.

If all information from the inventory data could be determined, the assignment of the product version is done automatically by the software recognition. Otherwise, it might be necessary to define a variant for use.

Remote clients can also be identified by Software Recognition. For this purpose, software usage data or metering data must be collected and imported. If remote usage is detected, a corresponding object is associated with the software. In addition, an automatic comparison of the remote clients with the existing assets takes place so that, if the assignment is unique, the remote client is linked to the asset. These assignments can be added to and overwritten manually.

Important	The processing and display of usage data must be actively switched on. For more on software usage data, see chapter "**Metering**" on page 143.

The functions for the Software Services can be found in the menu area of Spider Asset and are configured as follows in the standard menu configuration:



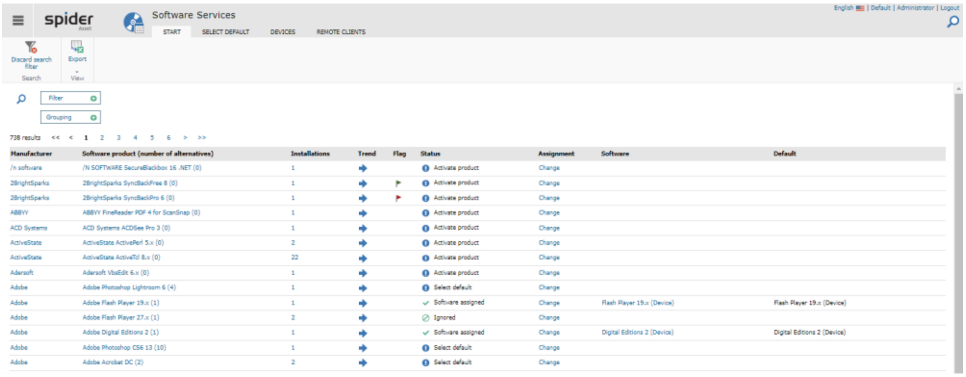
The functions for the individual tiles are described below.

2.5.1 Results

The recognition result shows which products have been recognized and how many installations of them exist. The page is structured like a search page, which allows searching and grouping via the available columns.

- On the Spider Asset page, click on the Results menu item in the *Software* menu area or in **Backstage** (see "**Backstage**" on page 35).

An export function as CSV or Excel file is available as well as the possibility to reset all set filters.



The columns **Manufacturer** and **Software** serve the overview and offer grouping by this column. In addition, links in this area take you to the respective page to edit the manufacturer or the software.

The column **Software products** contains the recognized software products with the indication of several possible alternatives in brackets. Alternatives are product variants that are not clearly recognizable by the Recognition Module. To create unambiguity, a choice must be made for software products with alternatives as to which of these alternatives is to be assigned.

Note

If the associated product version is not available in Spider Licence, e.g., because this product was not selected from the product catalog, no assignment can be made. These lines are marked with a blue dot with a white exclamation mark and have the remark "Activate product".
Action: Select the relevant product from the Spider Licence product catalog (see **"Selection of the products"** on page 173).

Via the **installations** you get to the dynamic tab, which shows more details about the software product. The **Trend** column shows the development of the number of installations over the last 90 days. The trend can be stagnant (horizontal arrow), positive (arrow points to the top right) or negative (arrow points to the bottom right). A graph of the development over the last 180 days can be viewed by clicking on the link in the referring column **Software product (number of alternatives)**. A **flag** can be freely assigned to a software product and is only displayed here, as is the status. The software assignment can be changed via Change. If this is done, this assignment is displayed in the Software column. The Standard column shows the software calculated by Spider Recognition.

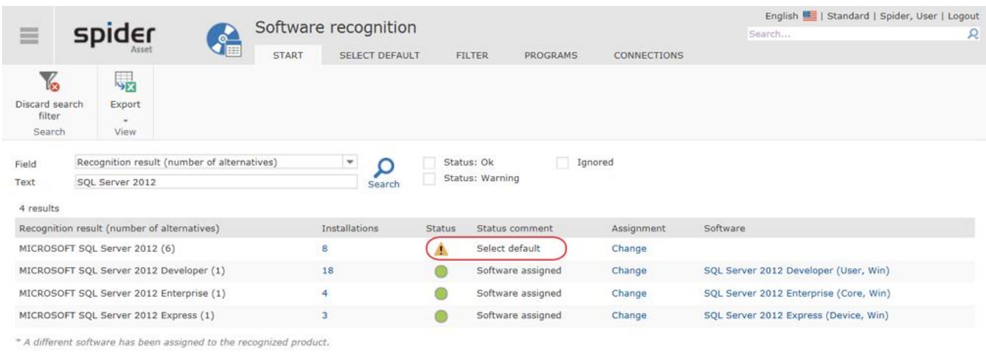
The contents on this page go beyond a mere display of existing data. Clicking on contents leads to further pages:

Assign Software

Spider provides several ways to ensure that the correct software is automatically assigned at the asset or to an employee.

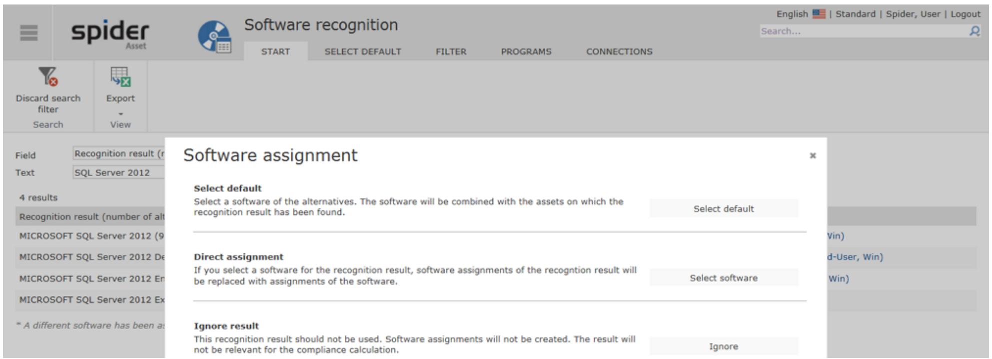
Select default software, classify

If the status is marked with a yellow warning triangle and if the status comment is *Select default*, a manual selection is required for this product.

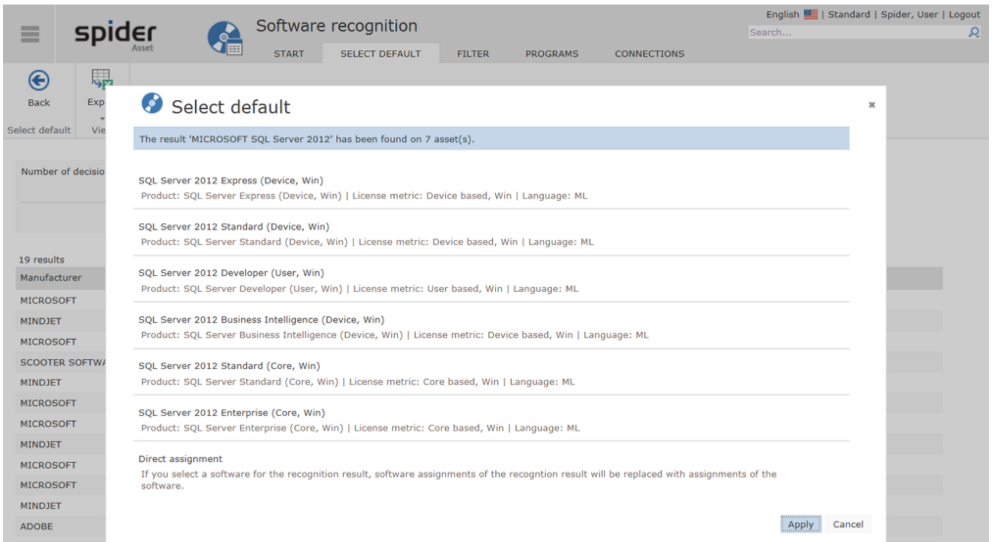


Due to incomplete information, the exact version could not be determined from the inventory system. This can also occur if there are several editions or license models for a software. This information is not always stored in the installation data and then requires a manual selection.

➢ Click on the link **Change**.

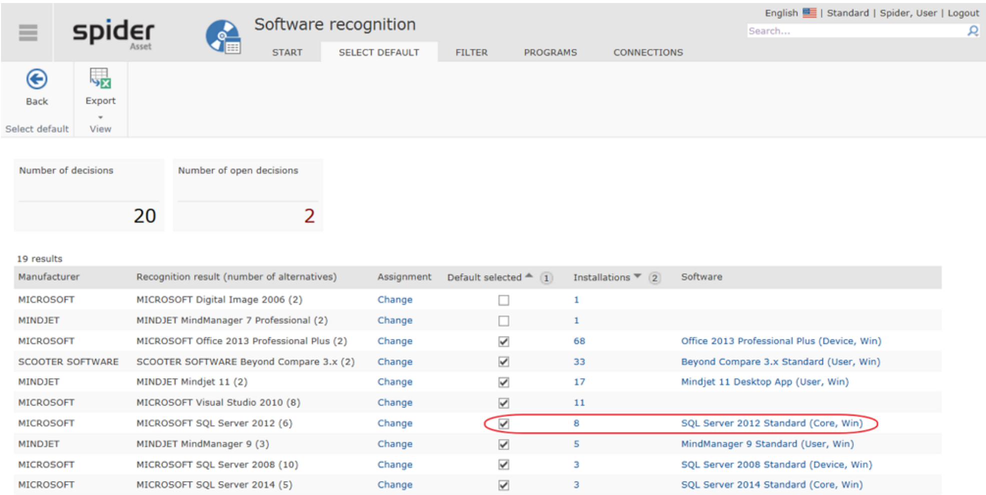


➢ Click on the link **Select default**, to view the possible options.



➢ Select the version which is in use and click on **Apply**.

Note If you have entered into an individual software agreement with the manufacturer, you can also **assign a software directly**, see the last item in the selection.



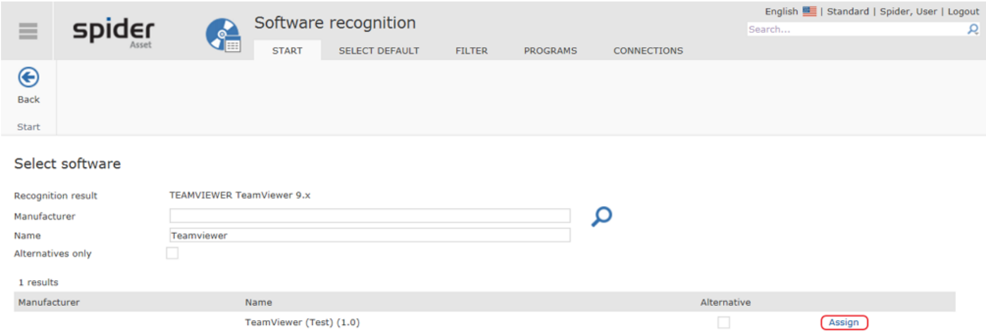
Products, for which a standard has been selected, are marked in the *Default selected* column.

Note An existing selection can always be mutated by clicking on the *Recognition result (number of alternatives)*.

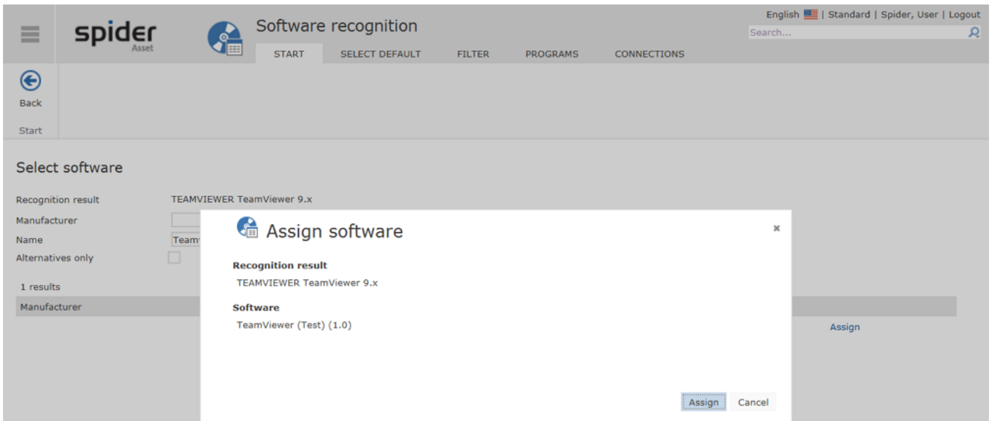
Direct software assignment

A direct assignment makes sense if the product is not available in the product catalog or if an agreement has been concluded with the manufacturer which is not covered by any default variant.

➢ Click on the **Select software** button, to execute a direct assignment.

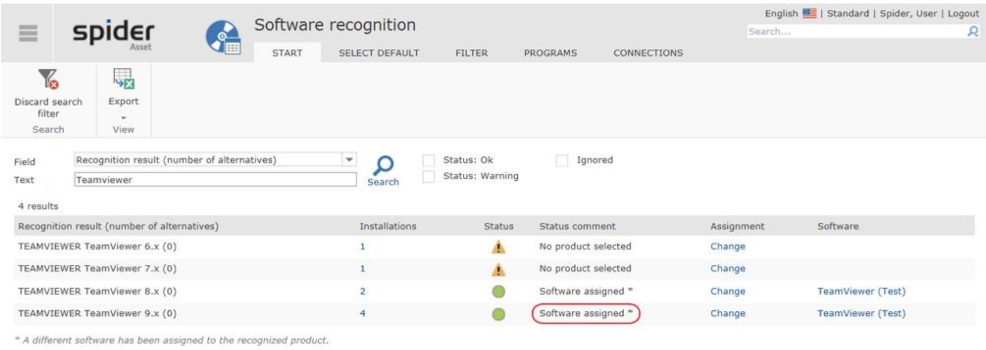


➢ Click on the **Assign** link next to the software which is to be assigned.



Due to safety reasons, the pending assignment will be shown once more.

➢ Click on the **Assign** button to confirm the process.

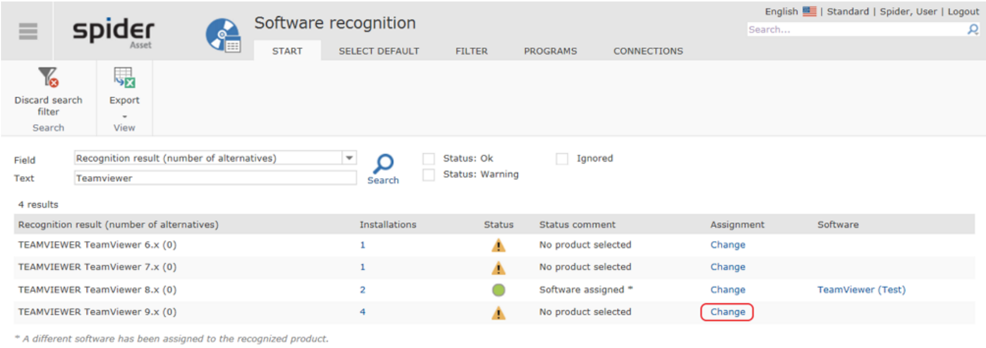


Note	In the status comment column, the direct assignments are marked by a *.

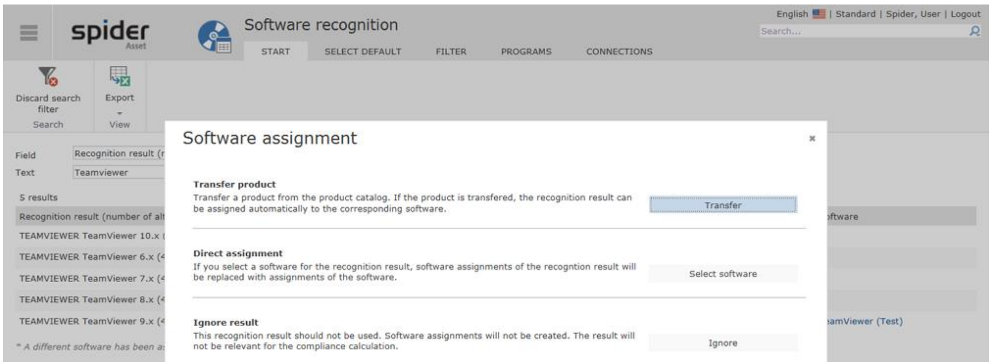
Note	Existing assignments -automatic or manual - can be edited at any time.

Select a product

If the status is marked with a yellow warning triangle and if the status comment is *No product selected*, there is no selectable product for this recognition result.



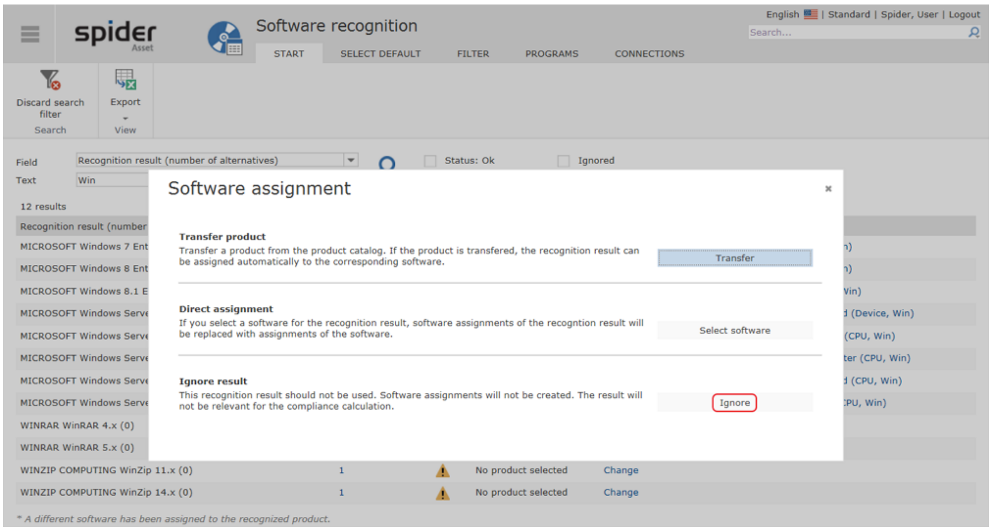
➢ By clicking on the link **Change** you can either transfer a product from the product catalog and assigned it afterwards, or you can assign a software directly.



Global ignoring of the recognition result

If a recognition result shall not be shown and processed in Spider, you have the option to select the **Ignore** status for the recognized product in the change function.

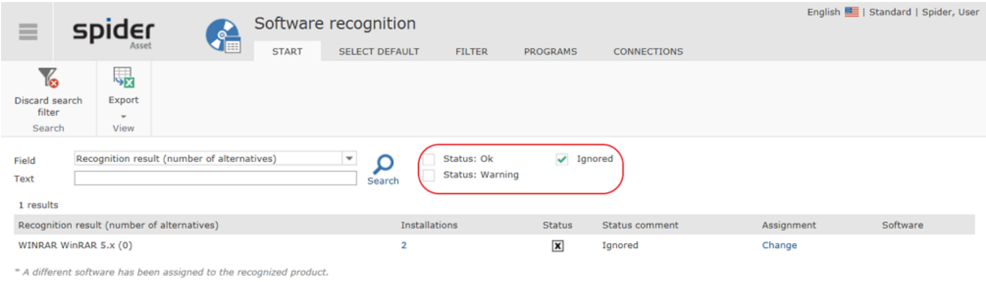
➢ Click on **Change** next to the product in the recognition result.



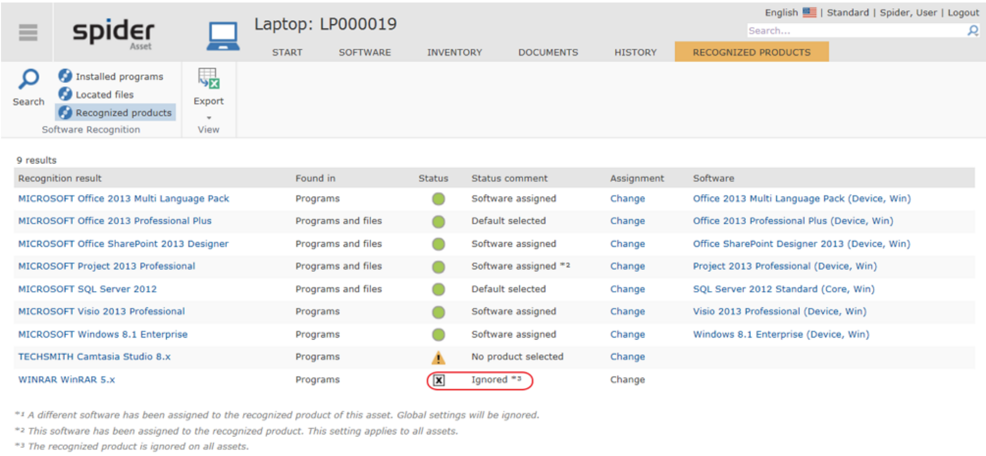
➢ Click on **Ignore** if this product is not in the SAM scope.

Note	If a recognition result is ignored, possible existing software assignments will be deleted with the next recognition sync.

Apart from OK and Warning you can also filter by the **Ignore** status in the recognition result.

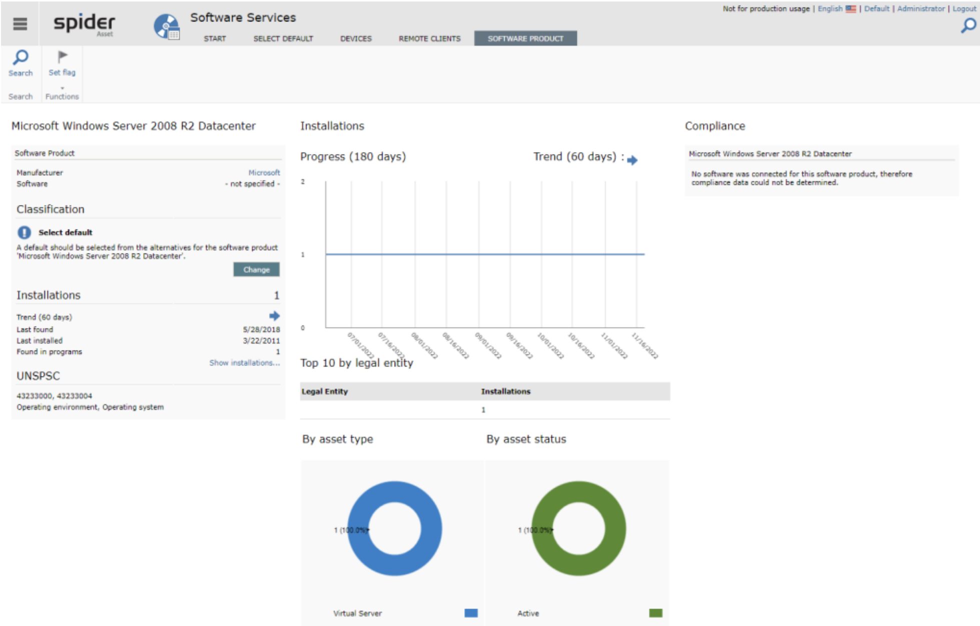


Ignored entries will be still displayed with the recognized products at the asset.



The dynamic tab “Software product”

➢ Click on an entry in the *Software Product (Number of Alternatives)* column to access the dynamic tab for that software product. Choose the Product „Microsoft Windows Server 2012 Standard“ for instance.



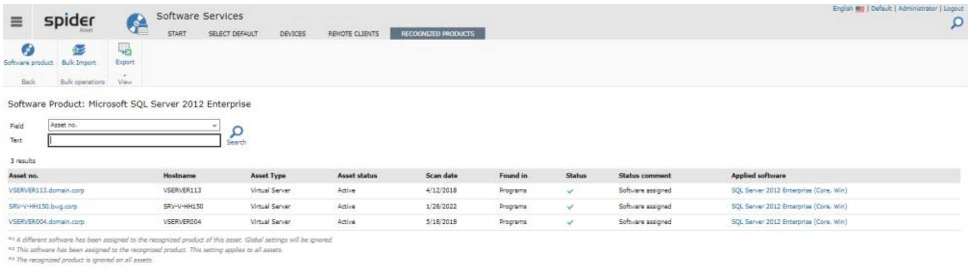
When a product is selected that you want to pay special attention to, you can set a colored flag. The flag is an order criterion according to which you can filter and group in the search.

➢ To set a flag, click on **Set flag** in the ribbon menu and select the desired colored flag from the list that opens.

The dynamic tab “Recognized Products”

➢ Click on a number in the **Installations** column to switch from the Recognition result to the relevant installations for a specific product.

See for example, the product *SQL Server 2012 Enterprise (Core, Win)*.



Alternative software assignments can be also maintained in Excel and imported back via multiple import (see **"Data export"** on page 57).

➢ Click the ribbon button **Export.**

The downloaded file can now be edited and saved in Excel.

➢ Then click the Ribbon-Button **Bulk Import** to import the changed file**.**
(Details on how to do bulk imports see chapter **“Bulk import“** on page 59)

Trend

This non-clickable column shows the trend of the number of installations over the last 180 days as a blue arrow indicator. The arrow points either upwards to the right, straight to the right or downwards to the right. This stands for positive, constant, or decreasing tendency respectively.

Details and the installation numbers as graphs over time can be found in chapter “**Software product (number of alternatives)**“ on page 93 above.

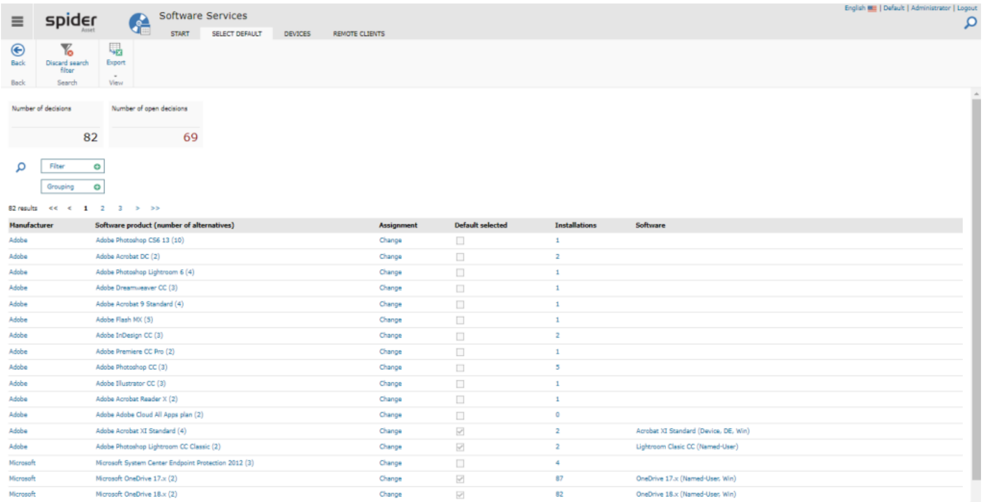
Flag

A flag is a colored marking of individual data records and is mainly used for filtering or sorting. To set a flag, the menu function "Set flag" is available on the detail page of the software product. See chapter “**Software product (number of alternatives)**“ on page 93 above.

Note:	The Flag filter shows existing flags only. If there are no results that have a specific flag, the filter will show up without that specific flag.

The tab “Select default“

This view shows the software products found on which a decision must be made. In this context, this means that the software product found belongs to a product for which several variants are known. Variants can be editions or manufacturer programs such as "Education", "Home" or "Enterprise", for example, which cannot be distinguished by the software scanners.

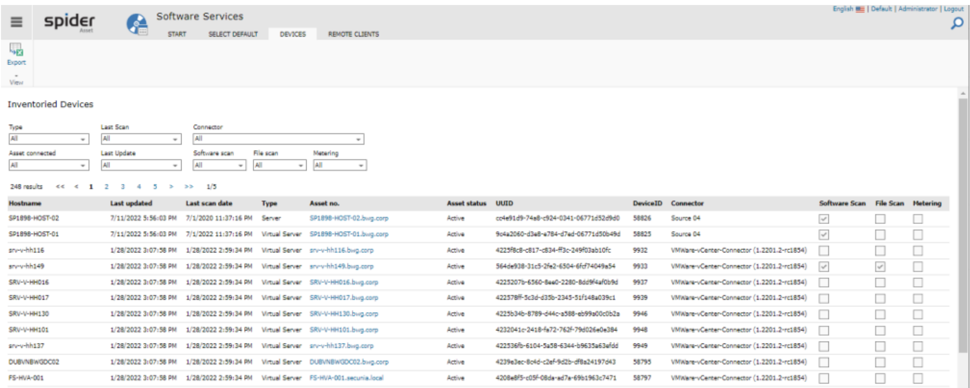


The tiles "**Number of decisions**" and "**Number of open decisions**" are indicators of the potential of possibly recognized software products that can still be leveraged. In the case of supposedly missing software assignments, the list shows whether a decision may be missing.

➢ To edit the assignment, simply click on **Change** in the **Assignment** column. For further information, please refer to the section **"Select default software"** on page 93.

The tab “Devices“

Under **devices** you will see a list of all inventoried devices.



Column	Description
Hostname	Name of the inventoried system
Last updated	Last update of the system in Spider
Last scan date	Date of the last scan
Type	Type of inventoried system
Asset no.	Identification of the assigned asset in Spider
Asset status	Status of the mapped asset
UUID	UUID of the inventoried system
DeviceID	Identification number of the scanned device in Recognition
Connector	Connector through which the system was delivered in Spider
Software Scan	If true, a software scan is available for the system.
File Scan	If true, a file scan is available for the system.
Metering	If true, metering data is available for the system.

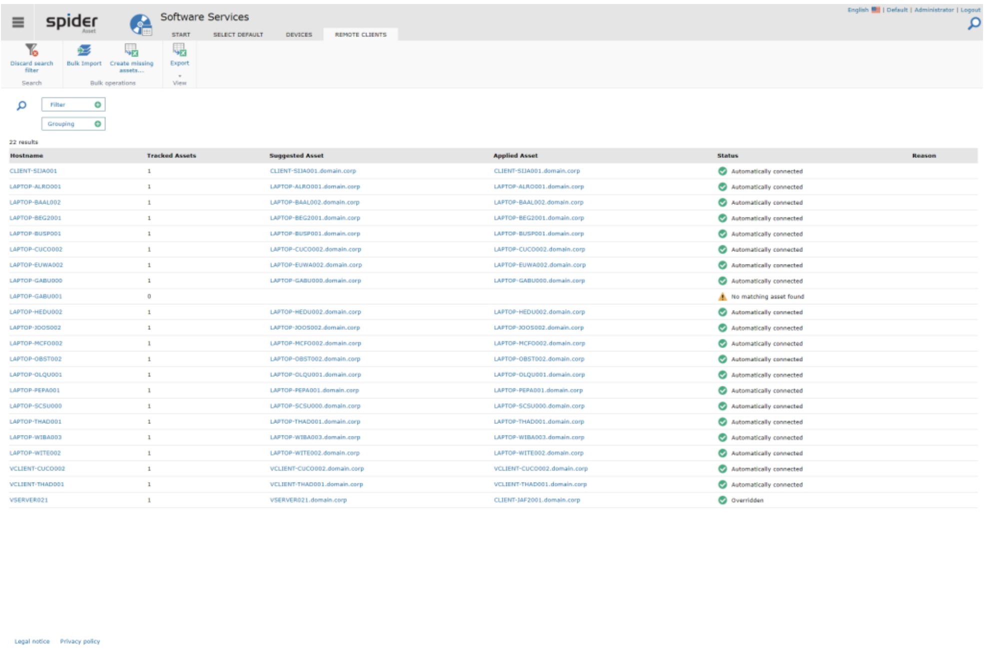
Note Use the filter function in the page to narrow down the displayed devices to the desired result.

The tab “Remote Clients“

Under Remote Clients, a list of all detected remote clients is displayed. These are determined via the usage data or the metering data and assigned to an asset by the recognition module. If the host name is not available or cannot be assigned unambiguously, no assignment is made and must be done manually.

Remote software results directly from the usage data of, for example, a CITRIX server and is displayed at the individual remote client objects.

➢ Click on the **Remote Clients** tab in the Results area.



Column	Description
Hostname	Hostname of the remote usage.
Applied Asset	The asset that is applied for this remote usage.
Reason	In case of ignored remote clients, a reason must be provided, which can be found here.
Tracked Assets	Number of Assets matching the reported hostname.
Status	Indicates whether this remote client could be connected or not.
Suggested Asset	Possible asset detected by the recognition for this remote client.

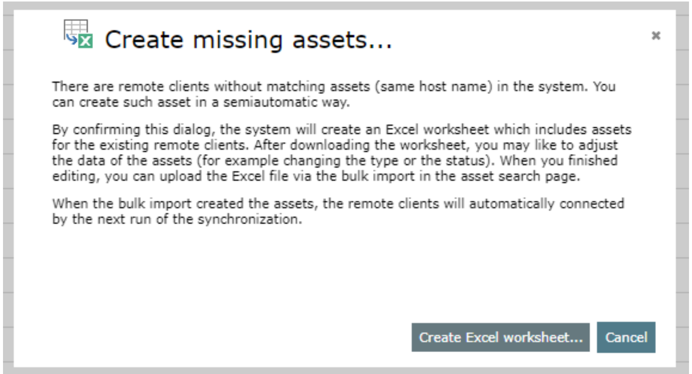
In the ribbon menu there are some more functions available. **Discard search filter** allows to reset all search parameters with one click. Export allows to extract the list of available remote clients from the system as Excel or CSV file. The import can then be done via the **Bulk Import** button.

Note Since remote clients are determined exclusively via metering information, the import function only allows the "edit" import mode. “Delete” or “create” are not supported here.

To automatically associate a remote client with an asset, the hostname must exactly match the host-name of one asset. In case of ambiguity, a manual decision must be made.

If there are many remote clients that do not have a match in an asset, an Excel file can be down-loaded from the system to serve as a template for creating these assets.

➢ To download these missing assets as an Excel file, click on the button "**Create missing assets ...**" in the ribbon menu.



Cancel closes the dialog without downloading, **Create Excel worksheet...** creates the file on the server and automatically starts the download.

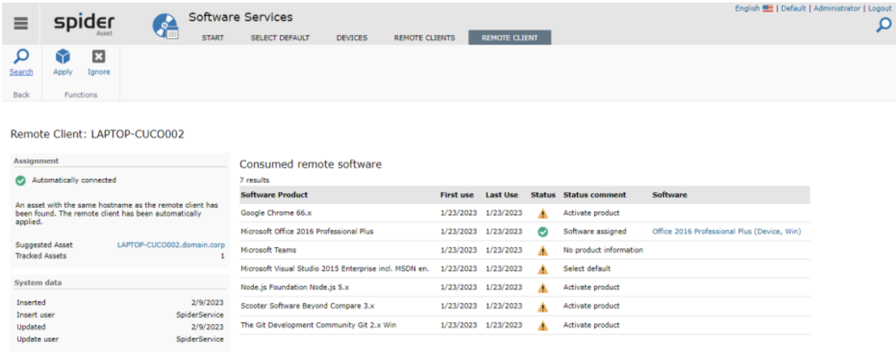
Note The generated file aims to create Asset objects. Therefore, an import must be done via the Asset search and not via the Remote Clients tab.

Note Once the missing assets are created, the remote clients are automatically linked with the next syn-chronization process.

The dynamic Remote Client tab

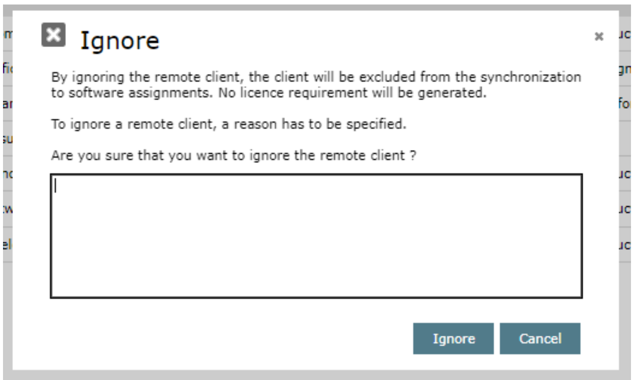
Details of a single remote client are displayed on the dynamic Remote Client tab. The page shows the status of the asset assignment as well as the used remote software. In case of ignored remote clients or manually assigned Assets, further functions are available here.

➢ In the search result of the remote client search, click on a host name that is displayed as a link.



In the ribbon menu, **Search** can be used to navigate back to the object search. **Apply** allows you to manually assign an Asset to this Remote Client. This selection overwrites Assets suggested by the system. In this case, it is also possible to use the "**Restore Default...**" button that then appears to undo this assignment and apply the suggested asset, if there is one.

➢ A click on **Ignore** shows a dialog informing about the Ignore function:



A comment is to be entered in the text box. The comment will be found in the corresponding column in the search overview. **Ignore** marks the data set, **Cancel** discards the action without changing the data. The dialog is closes after a click.

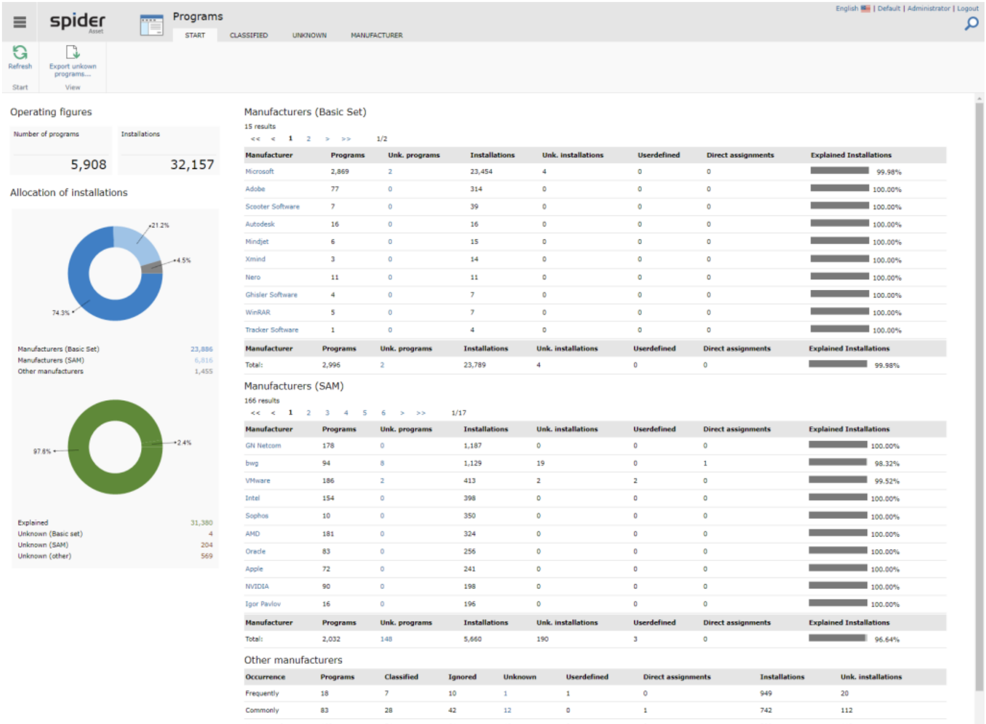
Only for ignored assets you will find the option to reactivate the status in the **Assignment** tile. To do this, click **Do not ignore anymore…**.

2.5.2 Programs

Programs are inventoried software found on at least one system in the inventory. Software Services provides several ways to classify these programs so that they can be managed in Spider. Once a program is managed in Spider, software associations are created for the program at the assets (systems) where the program is installed.

➢ From the Spider Asset page, click the Programs menu item in the **Software Services** menu area or in **Backstage** (see **"Backstage"** on page 35).

The overview shows the summarized inventory data (raw data) considering the normalization algorithms for the programs and manufacturers.



Under **Operating figures,** you will find the **Number of programs** found and the number of **Installations** in absolute numbers as well as in graphical representation.

Spider classifies the manufacturers into three groups:

Manufacturer Group	Description
Basic Set	These are manufacturers whose products are relevant to SAM and who have a large market share.
Manufacturer (SAM)	With these manufacturers, the products are also SAM-relevant. However, they are less widespread in the market than the products in the Basic Set.
Other manufacturers	SAM-relevant products can be found in this group if, for example, they have been installed via a software distribution and bear an individual manufacturer's name.
	Since this category often includes many installations, a distinction is made here according to the quantity of the installations. For example: Very often means that this product is installed on more than 10% of the devices. Very rarely corresponds to 0.025% of the devices.

The table with the individual manufacturers shows, like the overview, the number of programs and the number of installations per manufacturer. In addition, it also shows how many programs could be classified and how many are unknown. How high the classification degree is in each case, is represented at the end of the line.

Basically, the classification is done automatically by the software recognition. If, however, a program signature cannot be clearly identified, it is unknown to the system and appears in the column **Unk. programs** or in the tab **Unknown**. The user can classify these programs so that they lead to software assignments.

Note

If the related *product version* does not exist in Spider Licence because e.g., this product was not selected from the product catalog, no assignment will be possible. In the result overview, the status will be marked with a yellow warning triangle and the status comment will show the note *No product selected*.
Measure: In Spider Licence, the corresponding product must be **selected** (see "**Selection of the products**" on page 194) from the product catalog.

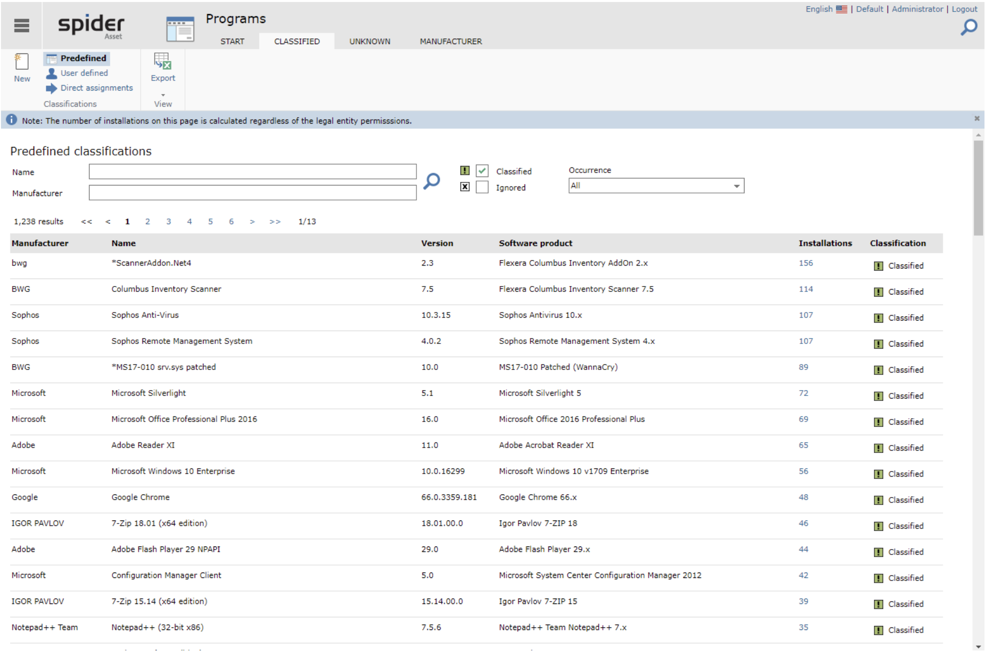
Manual export of unknown programs

If the transmission of unknown programs to our Recognition Center cannot take place automatically, the **Export unknown programs...** button can be used to create a swrd file that can then be used by the Recognition Center. To upload these files to our Recognition Center, please contact our Support.

The tab Classified

On this tab, shows all classified programs and their installations are listed.

➢ Click on the **Programs** menu item in the *Software Services* menu area or in the **Backstage** (see "Backstage" on page 35). Switch to the **Classified** tab.



Filter	Description
Name	Name Searches the **Name** column
Manufacturer	Searches the column **Manufacturer**. Since this can also be about non-normalized manufacturers, it is not possible to filter by SAM priorities here.
Classified	Sets whether classified software products are displayed or not. Default: On.
Ignored	Sets whether ignored software products are displayed or not. Default: Off.
Occurrence	This criterion shows groups of data filtered by the number of installations.

Note No unclassified software products are displayed at this point, only software products that are either classified or ignored.

Using the ribbon buttons: **Predefined**, **User defined,** and **Direct assignments** can be used to filter by classification type. Details on the classification types can be found in the section on the **Unknown** tab.

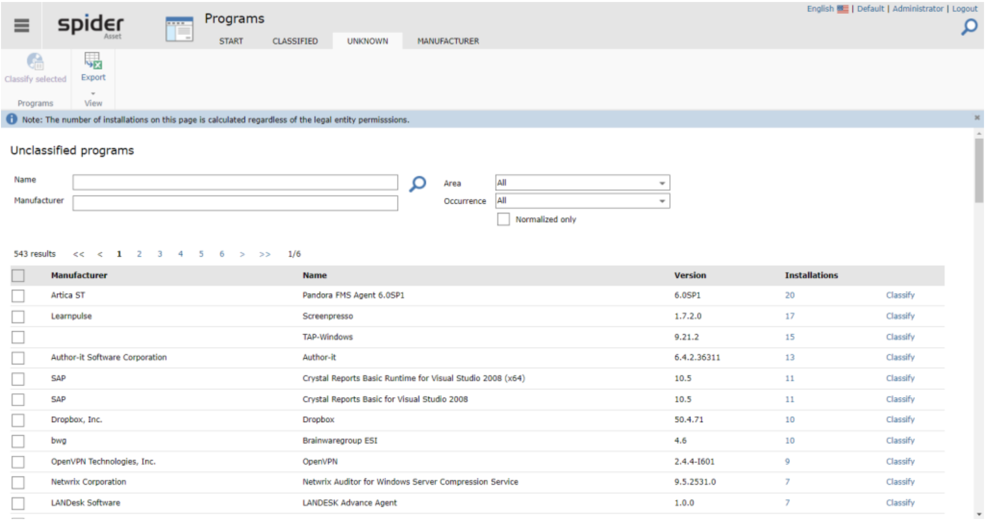
The number of installations is used to access a dynamic tab called **Installations**. It shows an overview of all Assets for this base product.

➢ Click on the link in the Installations column to access the assets via the dynamic Installations tab (See there).

The tab Unknown

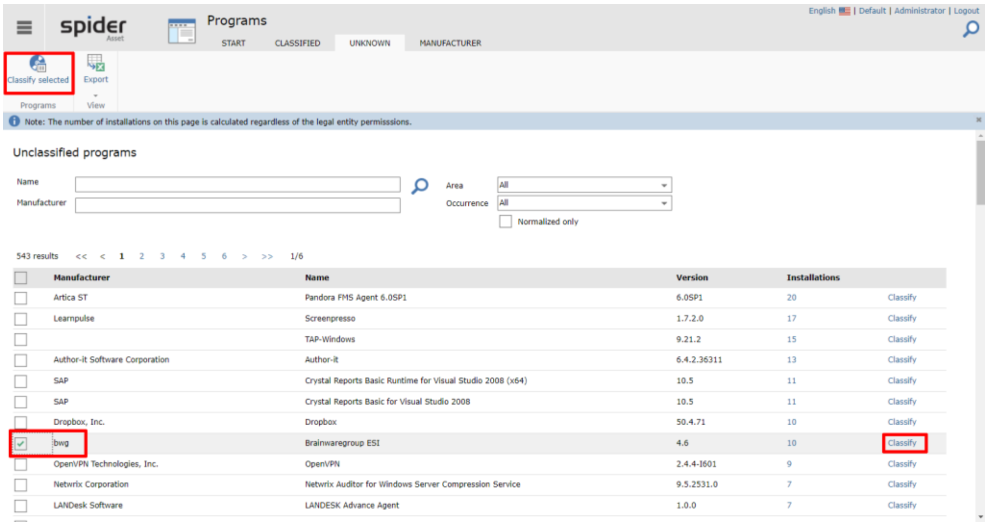
The **Unknown** tab lists the unclassified programs and their installations.

- Click on the **Programs** menu item in the *Software Services* menu area or in the **Backstage** (see "Backstage" on page 35). Switch to the **Unknown** tab.

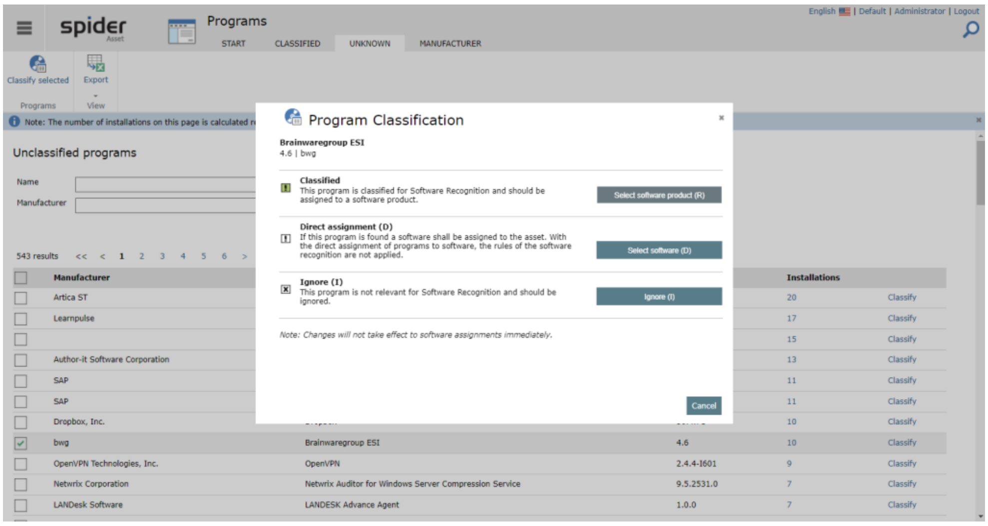


Filter	Description
Name	Searches the **Name** column
Manufacturer	Searches the column **Manufacturer**. Since this may include non-normalized manufacturers, it is not possible to filter by SAM priorities here.
Area	Search by manufacturer groups.
Occurrence	This criterion groups the data by frequency of occurrence.
Normalized only	**Yes:** Manufacturers that could not be associated with any known manufacturer are hidden. **No**: All manufacturer names from the scan data are displayed.

- Click on the link in the **Installations** column to access the assets via the dynamic Installations tab (see there).



- In the column on the right, click **Classify** for the program to be classified or select the elements to be classified and then click **Classify selected** in the ribbon menu.



The following options are available for user-defined classification:

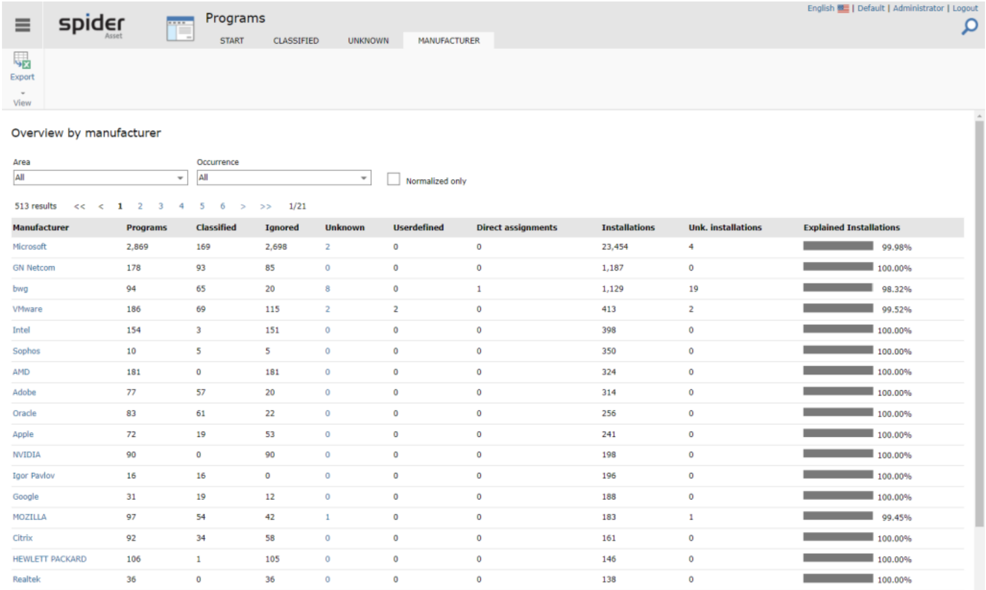
Classification	Description
Select software product	Assign the appropriate base product to the program. Pay attention to the edition. If the program does not contain an edition specification, select the edition less base product.
Select software	The direct assignment is used if no detection rule exists for a program. If this program is found, the software version selected here is assigned to the asset in question without taking a detection rule into account.
Ignore	The program is not relevant under licensing law and can therefore be ignored.

The tab Manufacturer

The overview by manufacturer shows: all inventoried editors/publishers with the number of installations and their classification level. The links can be used to navigate to the **Edit Manufacturer** form or to the **Unknown** tab (see previous chapter).

The entire list can be downloaded as a comma-separated list or as an Excel file via **Export** function.

➢ Click on the **Programs** menu item in the *Software Services* menu area or in the **Backstage** (see "Backstage" on page 35). Switch to the **Manufacturer** tab.



The following filter functions are available in this form:

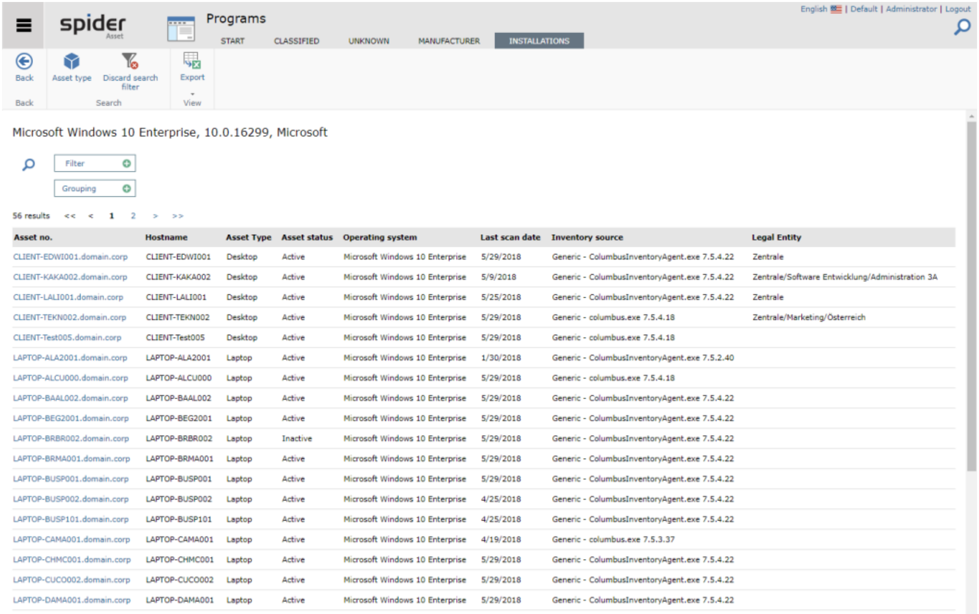
Filter	Options
Area	All
	Manufacturers (Basic Set)
	Manufacturer (SAM)
	Manufacturer (Basic Set and SAM)
	Others only
Occurrence	All
	Frequently
	Commonly
	Uncommonly
	Rarely
Normalized only	Checked / unchecked

Dynamic tab Installations

The dynamic Installations tab displays all assets of inventoried devices for a software product. To open the page, an installation number must be clicked on in a parent page.

As standard search functions, this page has the data export function and the possibility to reset all set filters. Since the result list consists of Assets, it is also possible to filter on individual asset types. More about search functions, see Chapter “Search functions” on page 46.

- Click on the **Programs** menu item in the *Software Services* menu area or in the **Backstage** (see "Backstage" on page 35). Switch to the **Classified** or **Unknown** tab.
- From the result list click a number from the **Installations** column.



Column	Description
Asset no.	Link to Asset object.
Hostname	Hostname of the Asset object.
Asset Type	Type of the Asset on which the Software is installed.
Asset status	Status of the Asset object.
Operating system	If an operating system is recognized on the Asset, it is displayed here.
Last scan date	Last scan date of this Asset.
Inventory source	Connector which delivered the data.
Legal Entity	Legal entity of the Asset object.

The **Back** button navigates to the origin page, i.e., either to the **Classified** or **Unknown** tab.

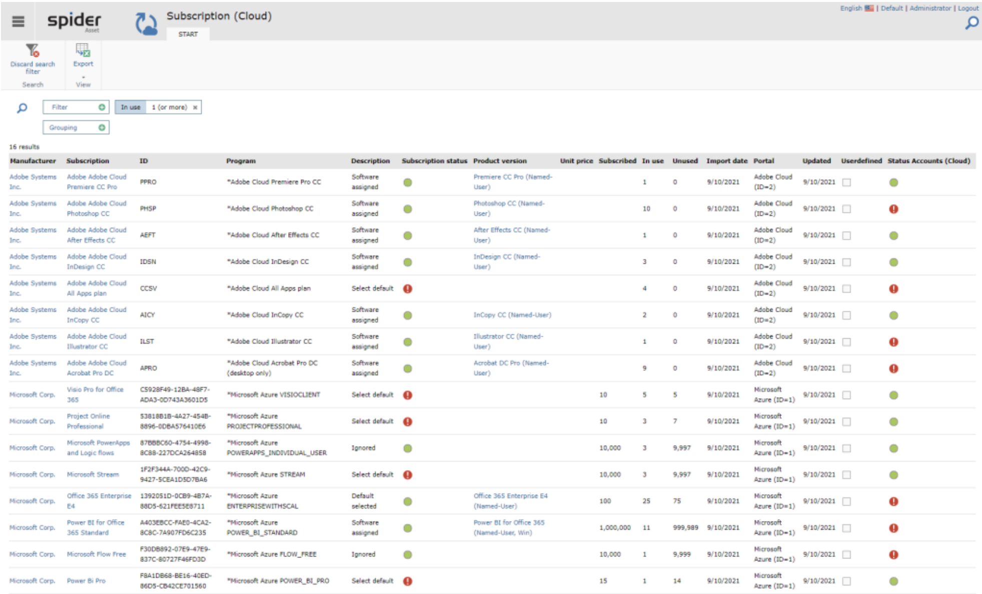
2.5.3 Cloud Subscriptions

Spider can be used to manage subscriptions from various software vendors that offer Software as Service (for example, Microsoft or Adobe). A distinction is made between subscriptions and accounts. Subscriptions describe the subscribed software as Spider identifies it and accounts the assigned cloud users.

Subscriptions

An overview of managed subscriptions can be accessed from the Spider main menu. It is represented as an object search form. As standard search functions, this page has the data export function and the possibility to reset all set filters. Since the result list consists of Assets, it is also possible to filter on individual asset types. More about search functions, see Chapter “Search functions” on page 46.

➢ Click on the **Subscriptions (Cloud)** menu item in the *Software Services* menu area or in the **Backstage** (see "Backstage" on page 35).



The page shows the status of the subscription and the assigned accounts. Depending on the status, different actions may be required in the subscriptions and/or accounts.

Subscription status

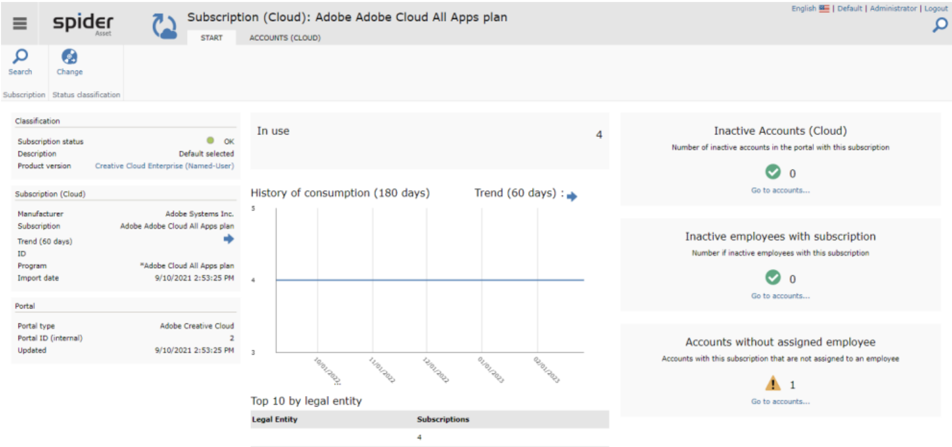
Status	Meaning / Action
Default selected	A product version has already been assigned to the subscription. No action required.
Ignored	The subscription is not license relevant and should be ignored. No action required.
Select default	The subscription does not have a product version assigned to it and therefore cannot be considered in compliance. A product version or software must be assigned.
SoftwareDirectAssigned	A software has been directly assigned to the subscription. No action required.

Account status

Status	Meaning / Action
OK	The subscription is used as expected.
Problem	There may be various reasons for the problem. This can be further analyzed in the subscription detail page. Common problem reasons: - Accounts do not have a user assigned. - One or more accounts have an inactive user assigned.

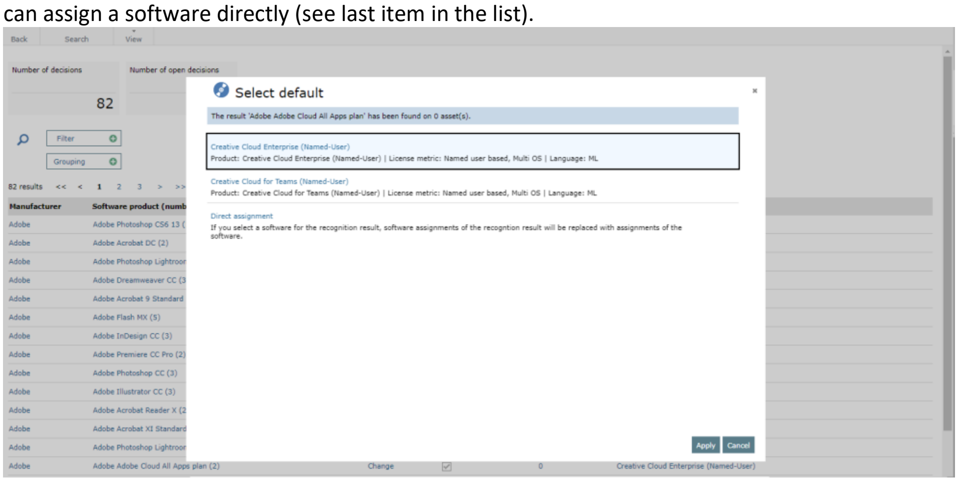
Software classification for a subscription

➢ Switch to the detail page of the subscription in question.



➢ Click **Change** in the *Status classification* ribbon menu group.

You will now be redirected to the classification page for software. Here you have the possibility to select a standard software for the subscription. If the desired software is not in the selection, you can assign a software directly (see last item in the list).



Both buttons of this dialog lead back to the initial page Subscription (Cloud). If the dialog is closed via the X in the upper right corner, the Back button in the menu will navigate back.

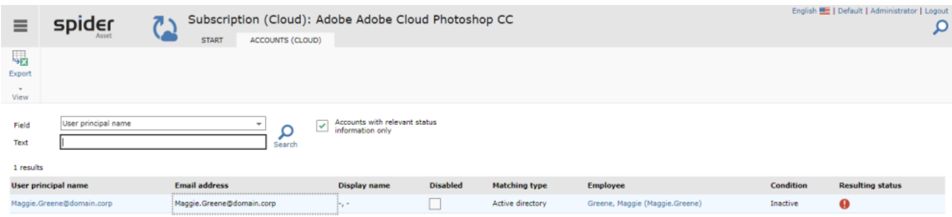
The tab „Accounts (Cloud)“

You can manage the accounts for a specific subscription from its Edit page.

➢ Click on the **Subscriptions (Cloud)** menu item in the *Software Services* menu area or in the **Backstage** (see "Backstage" on page 35).

➢ Switch to the detail page of the subscription in question.

➢ Switch to the **Accounts (Cloud)** tab



The list assists in finding problems with a particular subscription. Therefore, this search is limited to the accounts with status that need your attention. If you want to see all accounts for the selected subscription, uncheck the option **Accounts with relevant status information only**.

In this example, an inactive employee is assigned to the account, so the system reports "Problem" as the status for the subscription's account, since software assignments to inactive employees may possibly corrupt the compliance calculation.

Solve this problem by adding active employees to the account. For a detailed description of how to do this, see the **"Account** details**"** section on page 111.

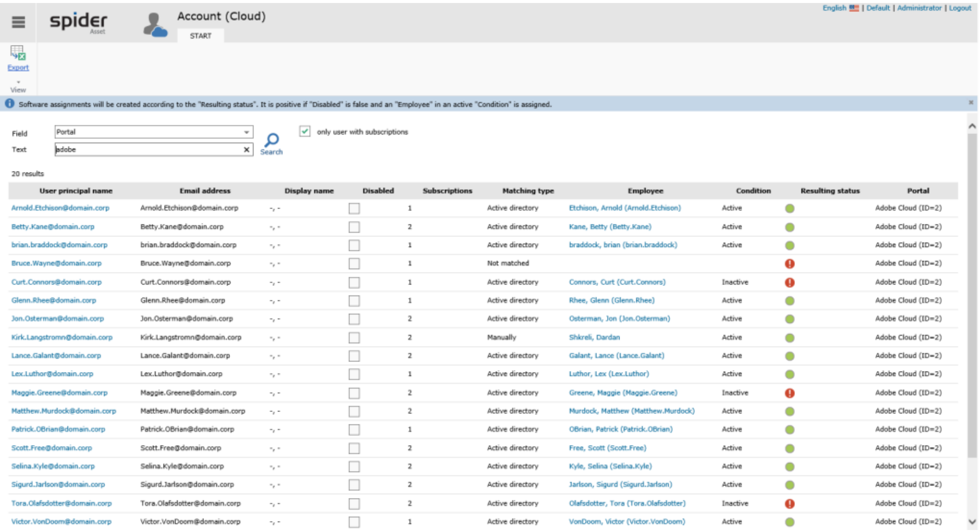
2.5.4 Cloud Accounts

The account overview shows which users the connected portals have and whether they could be assigned to an employee. In addition, the individual accounts can be viewed here to which portal they belong, and which subscriptions are assigned to them.

Accounts

An overview of the managed accounts can be accessed via the Spider main menu.

➢ Click on the **Accounts (Cloud)** menu item in the *Software Services* menu area or in the **Backstage** (see "Backstage" on page 35).

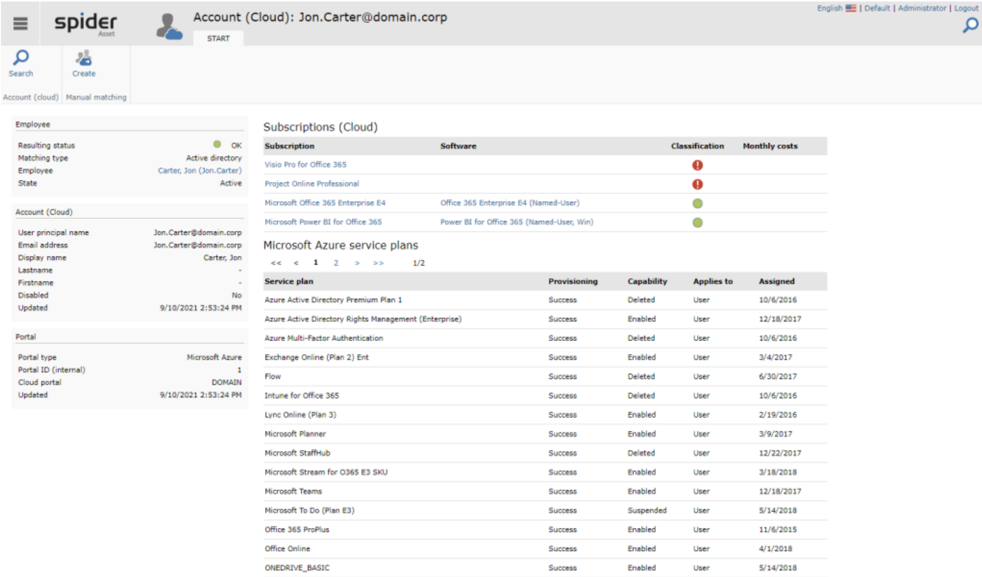


This list is used for display and problem finding. The data can be exported. Changes to the accounts must be reported via the corresponding connector and are therefore not possible in Spider. However, the result set can be restricted to users who have subscriptions to hide accounts which do not contribute to the compliance.

Account details

In the detail form for an account, you will find various key figures and evaluations that describe the account in more detail.

➢ Click on a User principal name in the first column to go to the Account detail page.

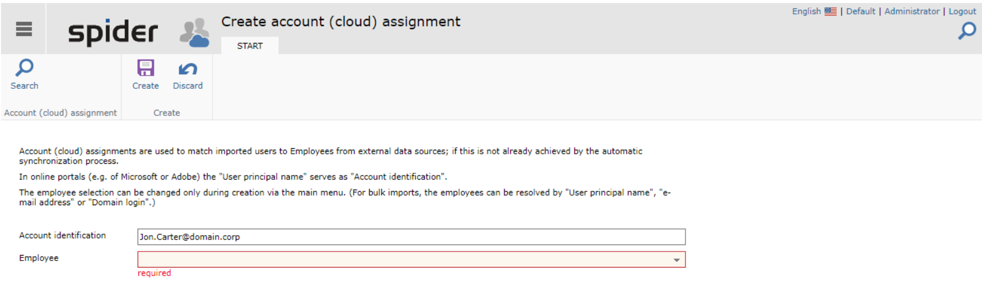


All existing subscriptions for an account are listed if there are any. Furthermore, in the case of Microsoft subscriptions, the associated service plans are displayed in tabular form. For Adobe, group memberships are listed.

Note	Compliance relevant software assignments are not created on the Account object, but on the Employe object. Therefore, it is important that an active Employee is assigned to an Account.

If the account-to-employee assignment cannot be done automatically, it must be done by the user.

➢ To assign an employee to an account, click the **Create** button in the “Manual matching” ribbon group.



➢ Select an Employee from the yellow highlighted list and confirm your selection in the “Create” ribbon group by clicking the **Create** button.

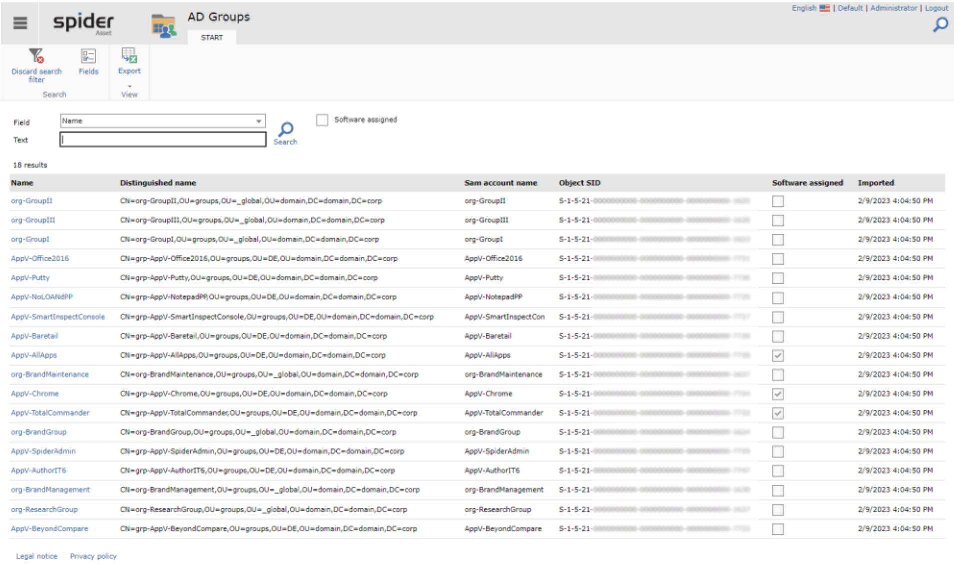
The assignment takes you to the employee context, where further functions are available for this employee and accounts can also be removed again. For details on the options available for an employee object, please refer to the chapter **Edit employe** on page 315.

2.5.5 AD Groups

AD groups can be imported automatically via Software Services. Here Spider offers the option of assigning software to AD groups.

If one or more Software objects are assigned to an AD group, Software Assignments are automatically created for the Employees who are member of the AD group. If the AD group contains computer objects that are assigned to Assets, the Software Assignments are created on these Assets.

➢ Click on the **AD Groups** menu item in the *Software Services* menu area or in the **Backstage** (see "Backstage" on page 35).

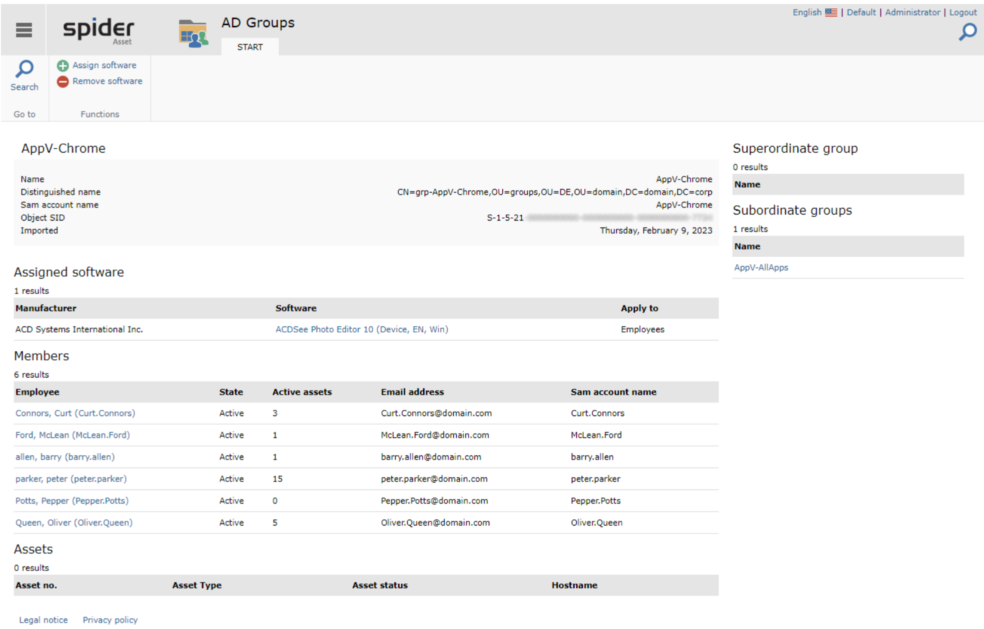


The search can also be narrowed down to those AD groups to which software has already been assigned. To get more information about a specific AD group, the group name in the first column is a link to the detail page.

Details of an AD group

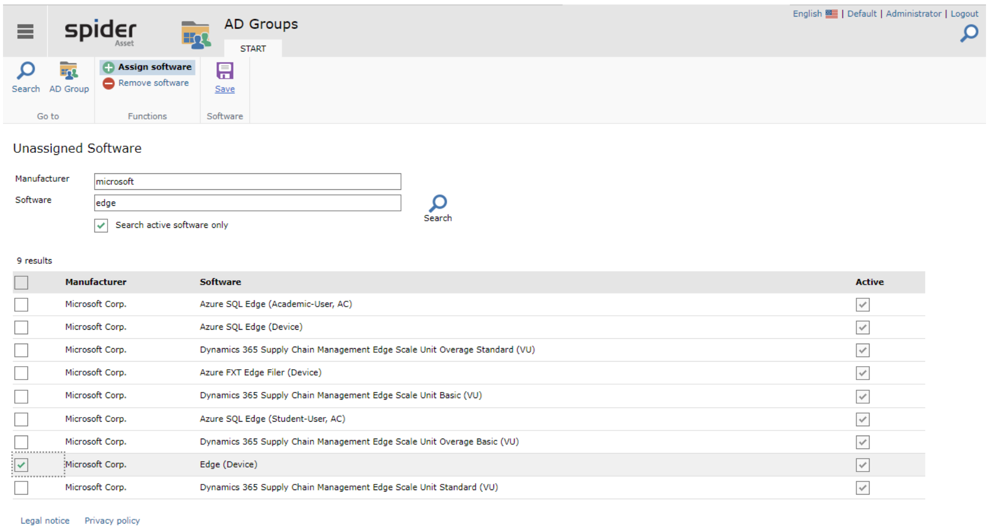
The details page of an AD group displays the main characteristics of the group for identification, the members of the group (employees) and contained computer objects (assets). On the right side, the parent and child groups are displayed, if any.

➢ Click the name of an AD group in the first column of the group search.



Assigning software to an AD group

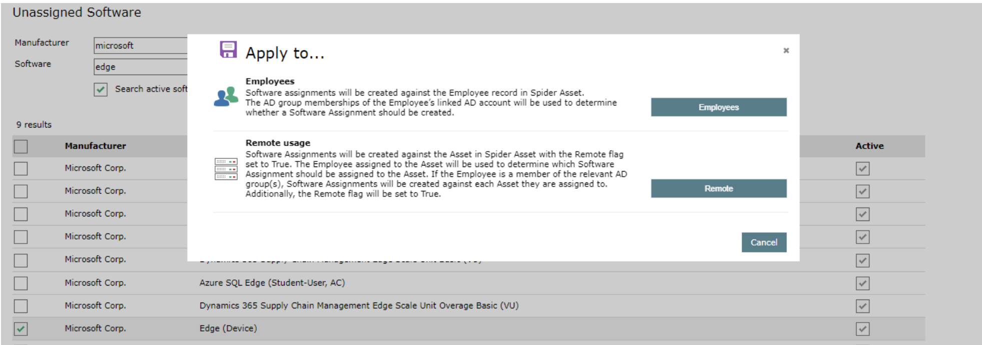
➢ To assign a software to an AD group, click on the **Assign software** button in the Functions ribbon group.



Filter the search result to find the desired software. Select a software via the checkbox in the first column side of the table.

➢ Confirm your selection by clicking the **Save** button from the Software ribbon group.

In the following dialog you define how the software assignments should be created. On the Employee or on the Asset object with remote use.

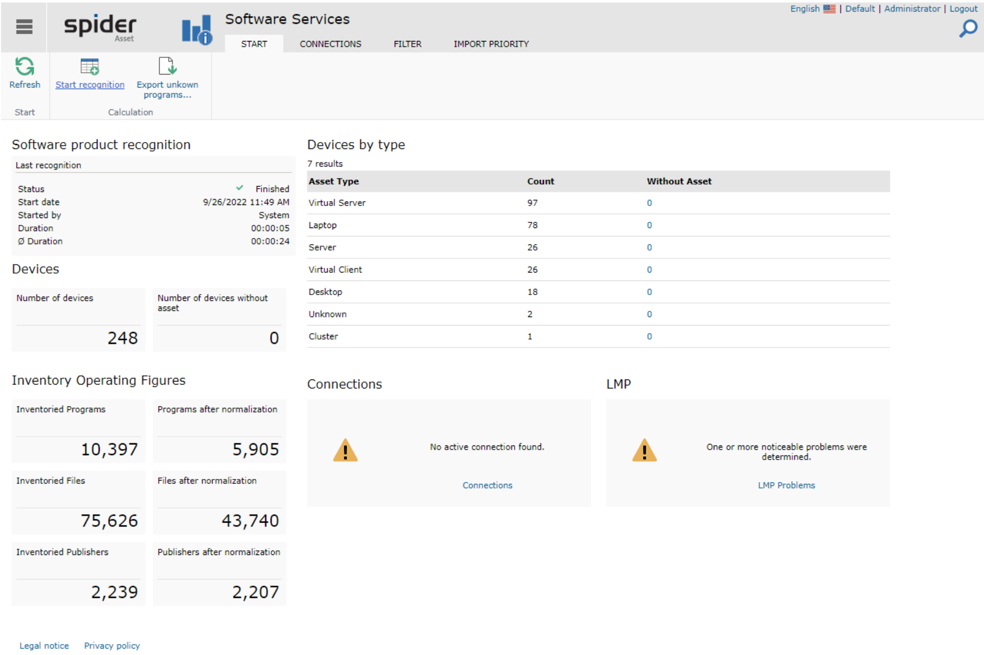


Confirm your selection by clicking on **Employees** or **Remote**. **Cancel** closes the dialog and returns to the underlying search.

2.5.6 Info & Settings

The quality of the data available in the system depends not least on the supplying systems. If there are problems there or during transmission, these are not very transparent and are often difficult to detect. On the following pages, Spider shows key figures about the status of the import data and indications of possible errors.

➢ Click on the **Info & Settings** menu item in the *Software Services* menu area or in the **Backstage** (see "Backstage" on page 35).



Devices should be able to be linked to an Asset. Problems can arise here with ambiguities or problems with synchronization. In addition, deviations from Asset type identifiers that Spider cannot transfer are noticed here.

In the case of problems with expected deliveries or the license metrics procedures, the first warnings and indications of error sources are given here.

The detection of the software products can also be started manually via the Start recognition ribbon button if there is a suspicion that errors occur here, or that this process was no longer started.

➢ On the overview page of the **Software Services** page, click **Start recognition** in the ribbon menu. The information in the **Software product recognition** tile will be updated. When the process is complete, the status reaches "Finished".

Note	Since the page does not refresh automatically, it may be useful to click **Refresh**, especially if software product detection is in progress.

Manual export of unknown programs

If the transmission of unknown programs to our Recognition Center cannot take place automatically, the **Export unknown programs...** button can be used to access a function that creates a swrd file that can then be uploaded to the Recognition Center.

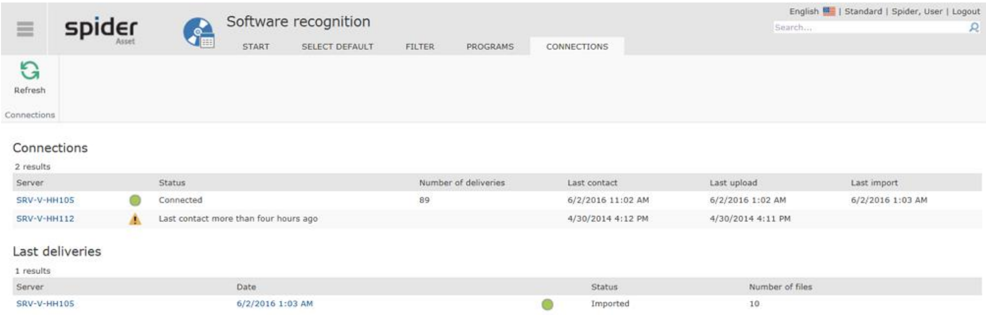
For details about such a file upload please contact our support.

For more information on the Recognition Center, see the chapter **"Software recognition"** starting on page 63.

Connections tab

The Connections tab displays connected systems that provide data to the Software Services module.

➢ Click on the **Connections** link in the overview or switch to the **Connections** tab to check the status of the SDC connections.



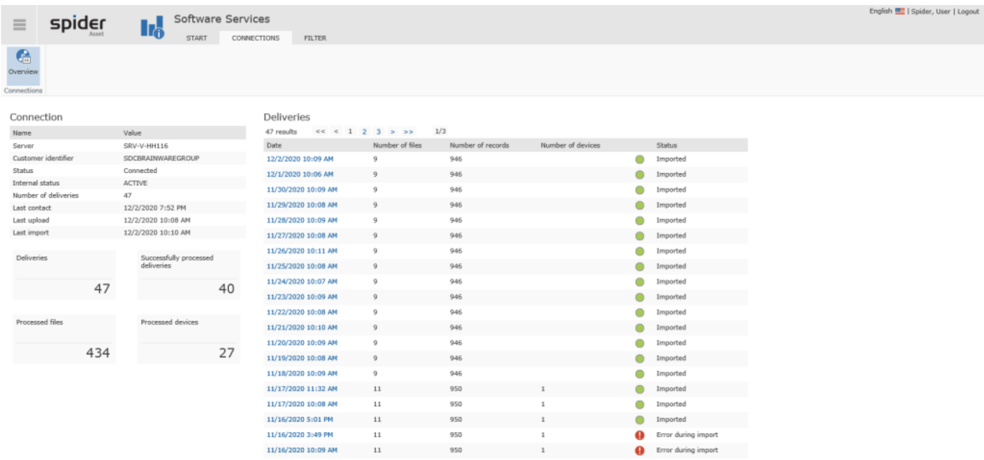
Note	You can set up several SDC instances for one mandator.

The overview shows a summarized status for each SDC instance which is derived from the following details:

Column	Description
Last contact	Shows when the SDC did report for the last time. If more than four hours have passed since this event, the status will change to a warning with corresponding message.
Last upload	The last delivery uploaded successfully. If more than 25 hours have passed since this event, the status will change to a warning with corresponding message.
Last import	Shows the time of the last import.
Last delivery	Shows when the last delivery took place and whether it was processed successfully. If there have been errors during the import, the status will change to red, and a corresponding message is output.

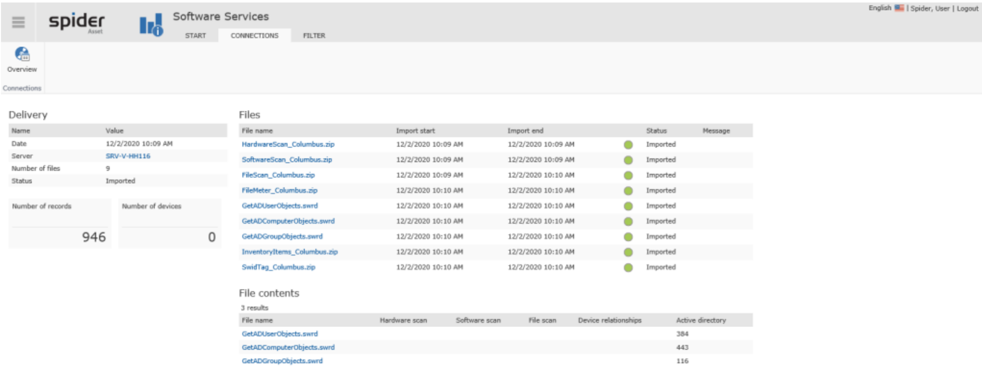
To be able to analyze the errors, a multi-stage drill-down is possible via the activated links.

➢ Click on the **link** in the *Server* column.

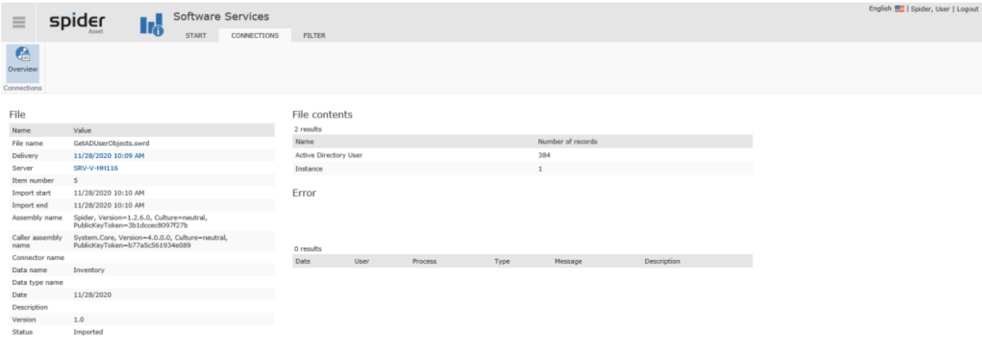


On the left, you will find all the connection data, and, on the right, the deliveries are shown in chronological order with the corresponding status.

➢ Click on any **date** to view the contents of the delivery.



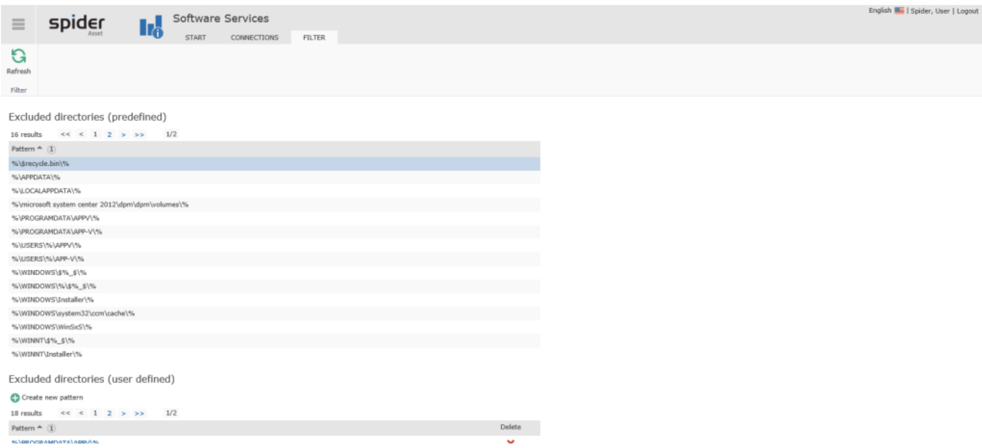
Another drill-down leads to the import data of each file.



Filter tab

The Directory Filter function can be used to exclude directories on the scanned devices from Software Recognition.

➢ In the overview of the *Software Services* form, switch to the **Filter** tab.



If further directories should not be considered by the software recognition, they can be entered under *Excluded directories (user defined)*.

➢ To do this, click on **Create new pattern**.

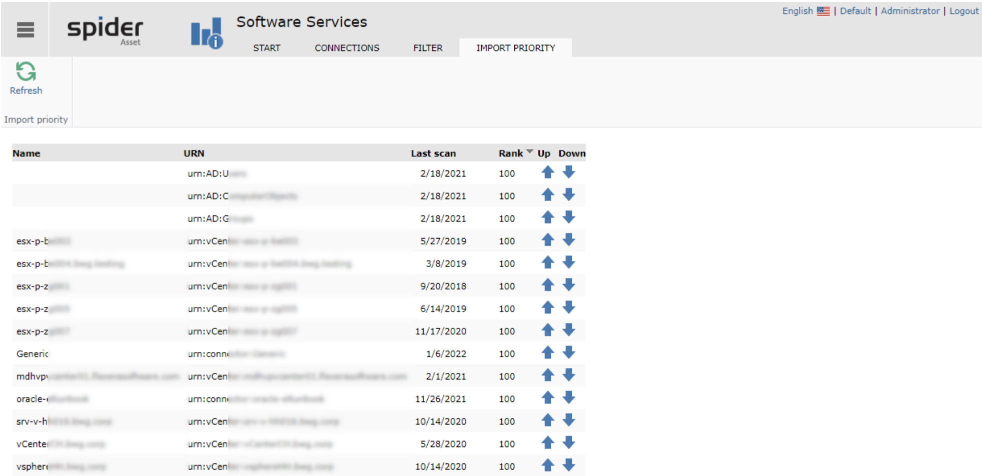
Note	Directory filter and classification will be applied only at the next update.

The tab “Import Priority”

The **Import Priority** tab takes you to the page for setting the import priority. Initially, all data sources have the rank: 100. By clicking on the arrow icons next to a data source, this can be increased or decreased.

Note	Changes at this point can only take effect with a new data delivery and import of the data.

- In the overview of the *Software Services* form, switch to the tab.



Import priorities or ranks mean that data sources are only evaluated if there has not yet been any data from higher-ranking connections. In the case of equal rank, the processing sequence is decisive, whereby successive data deliveries of the same rank overwrite each other and the last data delivery is therefore valid.

The default rank is 100, which is also used for connectors that do not appear in the list, such as the Columbus Data Collector. Their ranks are thus unchangeable.

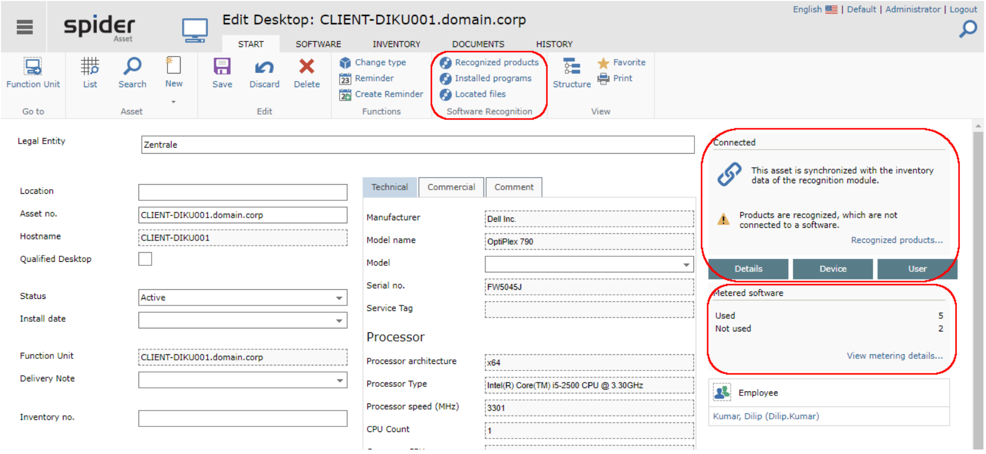
The rank is not recorded per connection, but per data group. In most cases, a connection does not deliver only one data group, such as hardware data, but hardware information is delivered and evaluated together with software information or device relationships. If, for example, a high-level connection supplies only hardware data, then data from a low-ranking connection that supplies hardware and software data cannot prevail with its hardware information, but it does contribute its software information.

Caution	Low ranking connections may no longer be imported. Change at this point only with caution.

2.5.7 Functions on the asset object

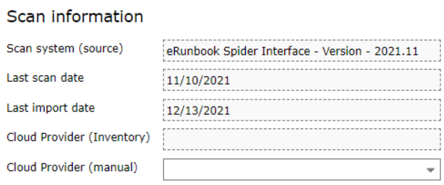
In contrast to the manually created assets, asset objects which have been created by the software recognition have an additional ribbon group. The functions of this ribbon group allow for a direct access to the data of the software recognition. In addition, the Connected tile for these objects indicates that this asset is synchronized with the inventory data from Recognition.

- Click the **Details** button to learn more about technical content and synchronization status. For example, to check when the last software or file scan was performed. The ID of the connected device is also displayed here.
- Via the **Device** button, further function is available, e.g., deleting inventory data, File Scan and Software Scan, etc.
- **User** shows the known users for this device and which of them is the current main user. By deleting the history data, a quick reassignment of a new user as main user can be accelerated.
- **Metered Software** shows indicates that software usage data was found for this Asset.



Scan Information

Without clicking the Details button, the Asset Edit page shows an information block. This shows the scanner used, scan and import dates, and a cloud provider.

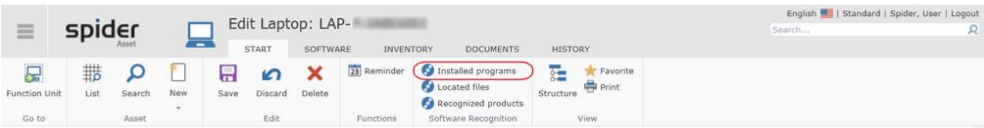


The cloud provider should be supplied by the scanner. Then the information can be found in the read-only field **Cloud Provider (Inventory)**. If this information is incorrect or not available, it can be overwritten. In this case, the field **Cloud Provider (manually)** field must be set.

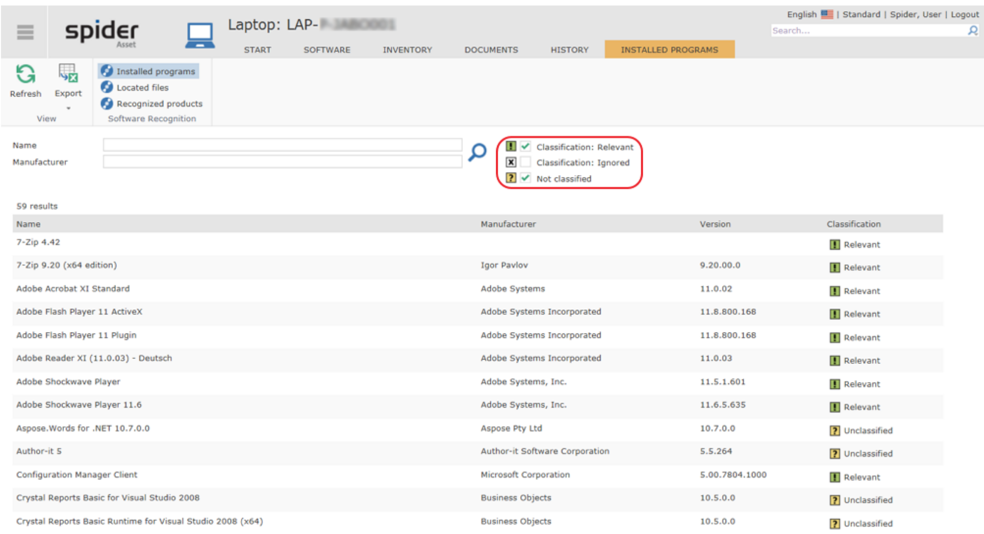
Note	A license metric procedure evaluates the cloud providers if they are present.

Installed programs

➢ Click on the **Installed programs** ribbon button in the Edit form of the asset.



This will list all programs which have been found on the device.

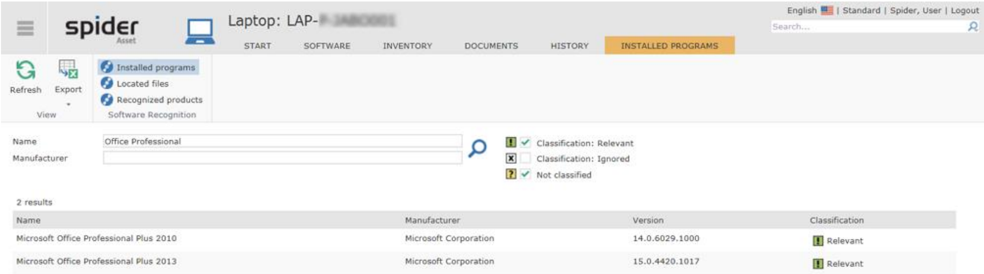


The following classifications are available for filtering the data.

Classification	Meaning
Relevant	Installed programs with relevance for the software recognition.

Classification	Meaning
Ignored	Programs which are not relevant for the software recognition.
Not classified	Installed programs which could not be classified by the software recognition.

Use the text filters *Name* and *Manufacturer* to apply the filter on programs or manufacturer. In addition, you can further restrict the result based on the classification.

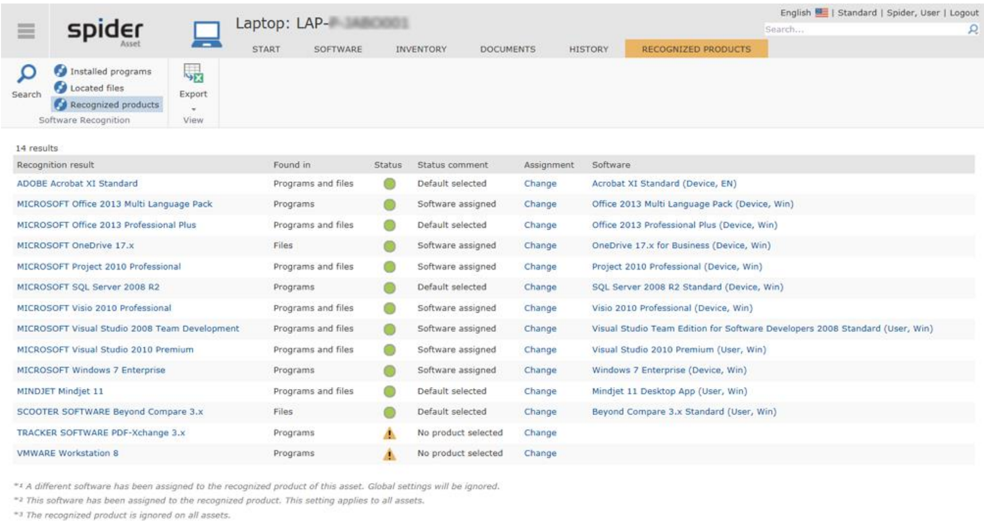


Note	If there is more than one entry for a program, the rules in the software recognition determine, how to **deal** (see "**Recognized products**" on page 121) with this.

Recognized products

By applying product-specific rules, the software recognition will identify the products which are subject to licensing from the raw data. For example, the system **found** (see "**Installed programs**" on page 119) both Microsoft Office Professional Plus 2010 and Microsoft Office Professional Plus 2013 on device LAP-P-JABO001. The recognition result, however, will only show Microsoft Office Professional Plus 2013 because according to the license regulations of Microsoft, only the highest version is subject to licensing.

➢ Click on the **Recognized products** ribbon button in the Edit form of the asset.



This will list all products subject to licensing which have been recognized by the software recognition for this asset.

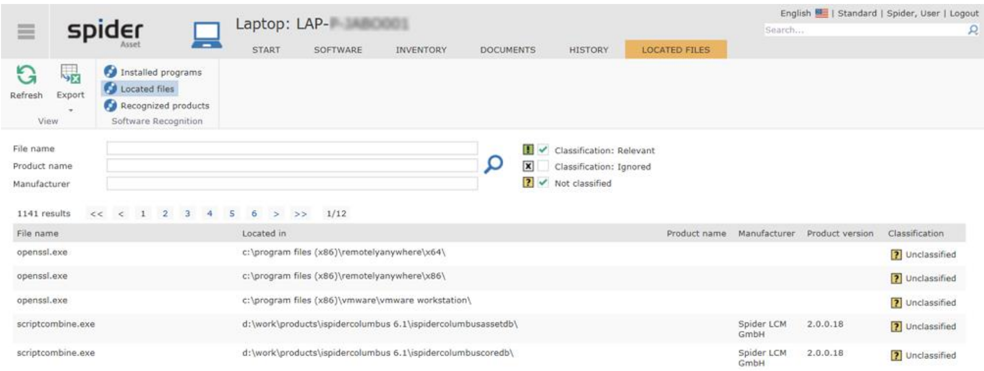
Column	Value	Description
Recognition result		Name of the product subject to licensing.
Found in	Programs and files	The recognition was carried out based on programs and EXE files.
	Programs	The recognition was carried out based on programs only.
	Files	The recognition was carried out based on EXE files only.

Column	Value	Description
Status	green	Shows that an assignment exists between the recognition and the software.
	yellow triangle	Shows that there is no assignment; for measures see status comment.
Status comment	Software assigned	A software version is assigned to the recognition result.
	Standard determined	A standard has been selected for this product.
	No product selected	To assign the software version, the product must be selected from the product catalog.
Assignment	Change	This function is used to individually change the software assignment for this asset.
Software		Name of the assigned software.

Note If there is no unique recognition of a product subject to licensing, manual interventions are required.

Found files

➢ Click on the **Located files** ribbon button in the Edit form of the asset.



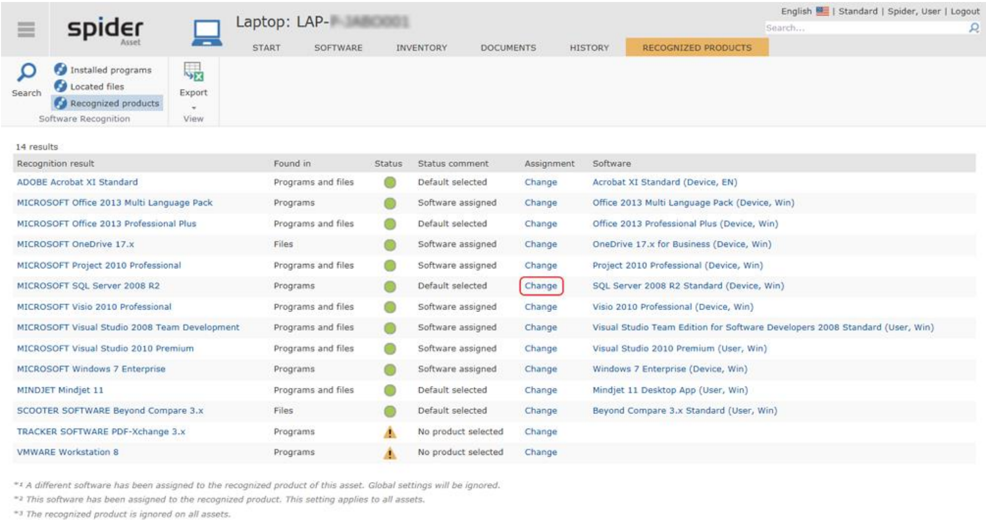
This will list all exe files which have been found on the device. Use the text filters *File name*, *Product name* and *Manufacturer* to further restrict the result. In addition, you can further restrict the result based on the classification.

Classification	Meaning
Relevant	The exe file is relevant for the software recognition.
Ignored	These files are not relevant for the license management.
Not classified	Files which have not been recognized by the software recognition.

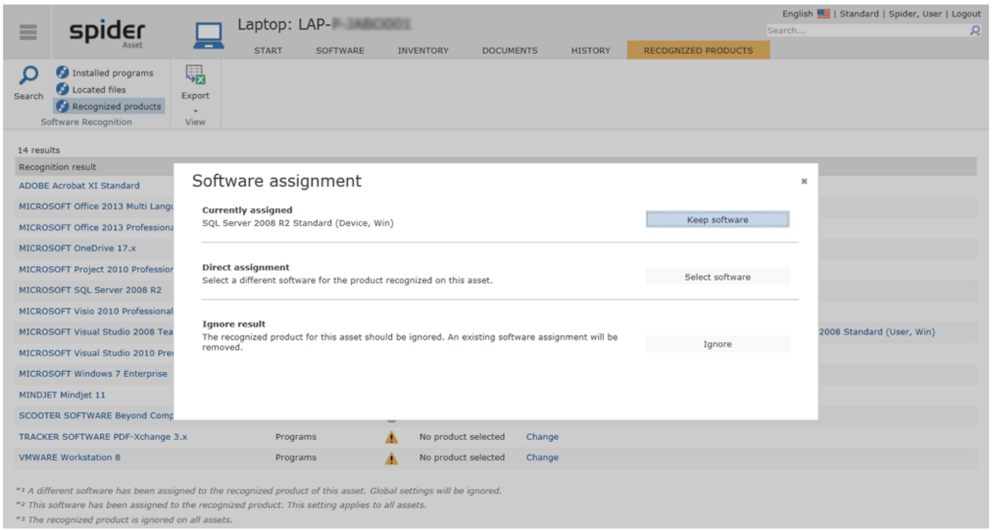
Determine deviating software at the asset

If a different software assignment should be applicable for a certain asset, you can change this setting individually for this asset.

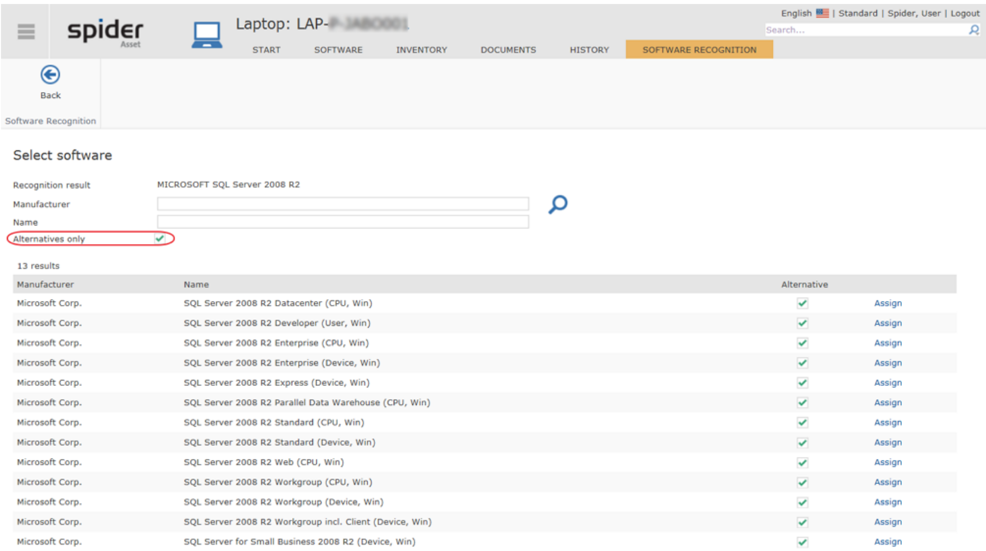
➢ Click on the **Recognized products** ribbon button in the Edit form of the asset.



➢ Click on **Change** at the corresponding product in the *Assignment* column.

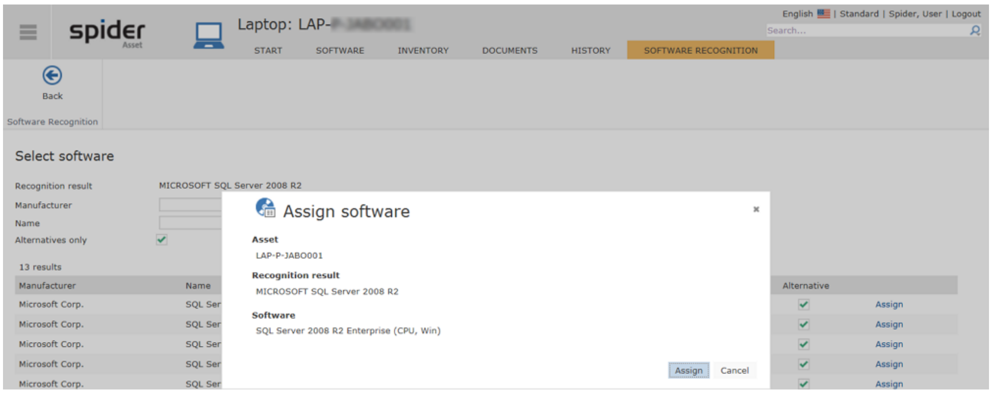


➢ Click on **Select software** if you want to modify the current assignment.

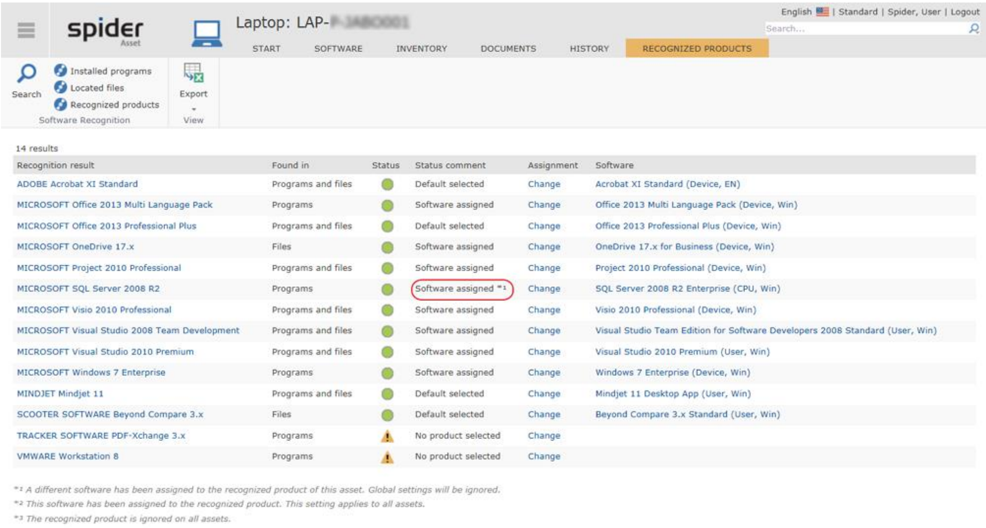


By ticking the check box, alternatives to the recognition result are offered for selection.

For the asset in our example, the software version *SQL Server 2008 R2 Enterprise (CPU, Win)* shall be assigned instead of *Microsoft SQL Server 2008 R2*.



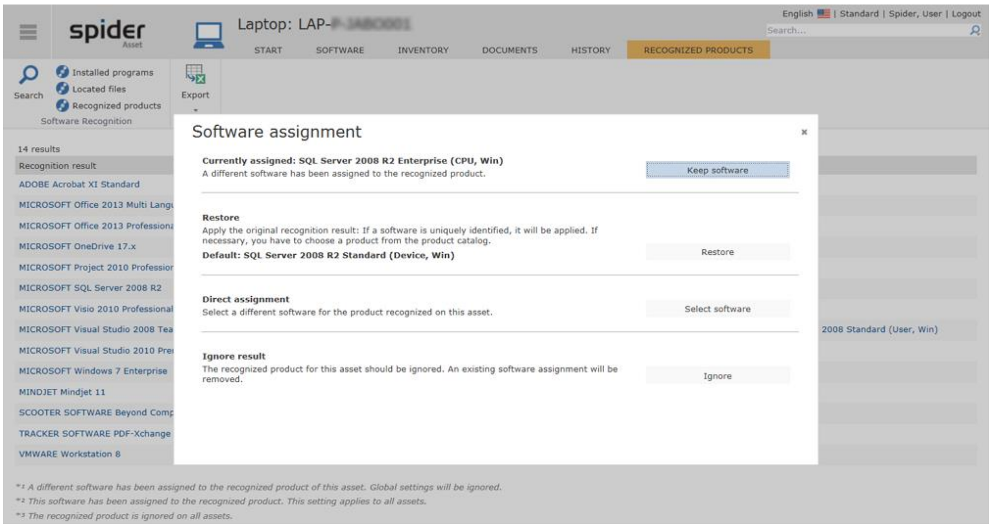
➢ Click on **Assign** if you want to assign the selected software version to this asset.



In the Status comment column of the result overview, the modified assignment will be marked with *1.

Important	This modification has no effect on the software assignment of the other assets.

To undo the individual assignment, the change function may be run again.



➢ Select the **Restore** function to undo the assignment.

Note	Apart from modifying the software version, you may decide for each asset that a recognition result for this asset shall be ignored.

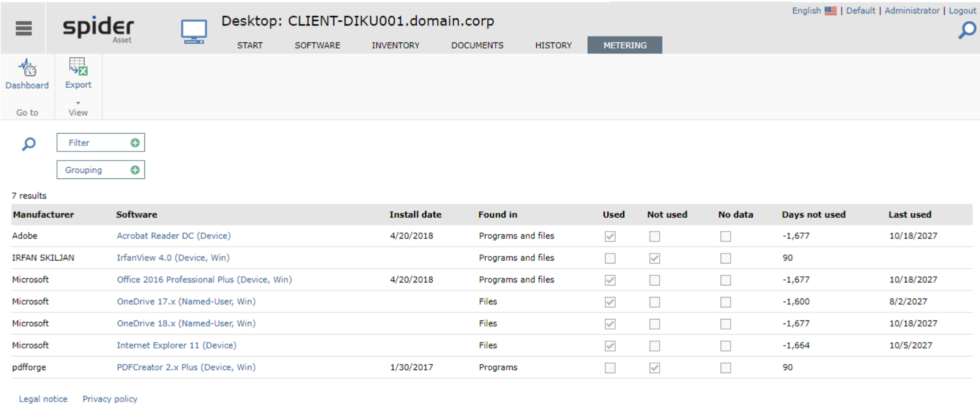
➢ Click on **Ignore**.

In this case, an existing software assignment will be deleted with the next synchronization run.

View metering details

From the **Metered Software** tile, the **View metering details...** link can be used to switch to the dynamic **Metering** tab.

➢ Click on **View metering details...** in the Edit page in the **Metered Software** tile.



The overview shows usage data in the context of the selected asset. From here, you can access the listed software objects or even the Metering Dashboard. For details on metering, see the "Metering" chapter on page 143.

2.6 Manual software management

If the above-mentioned automatisms of the software recognition are not required or not desired, it is also possible to create and manage the software manually as described below.

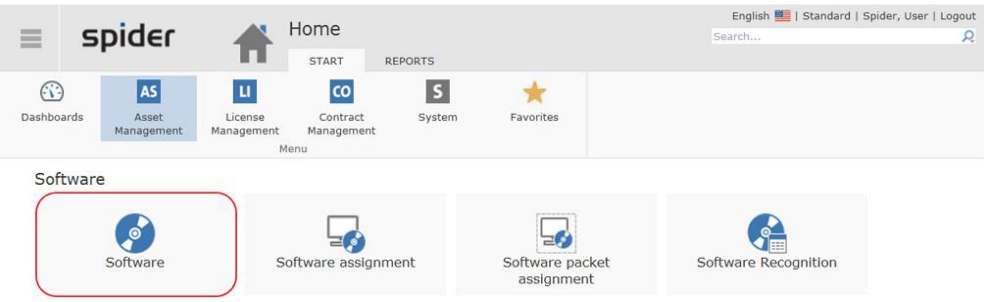
2.6.1 Software / Software shopping cart

The software shopping cart is used to define the software which can be selected. Each software contains basic parameters which are valid for this software and the related assignments. Furthermore, after the software assignment, other properties can be defined which are valid for only one determined assignment.

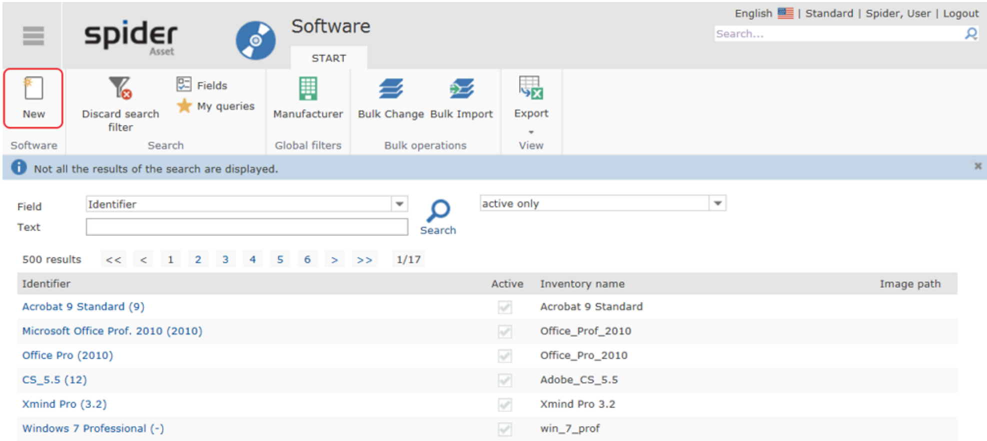
Create software

If you have the required rights, you can create new software.

➢ On the home page of Spider Asset, go to the menu area *Software* or to the **Backstage** (on page 35) and click on the **Software** menu item.

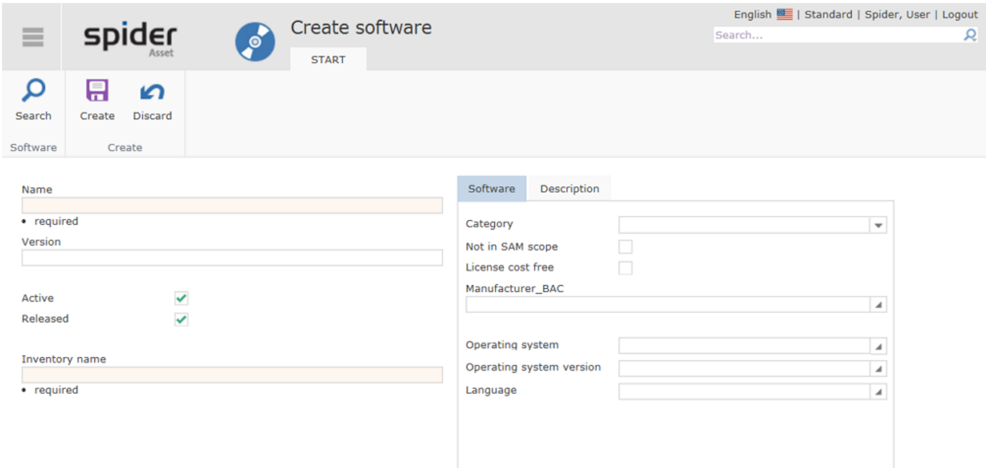


The software entered the system is listed.



➢ Click on the **New** ribbon button in the Software search form or in the Edit form of a software to create a new software.

The form for entering the software data will open.



The data fields which must be filled in are marked as mandatory fields.

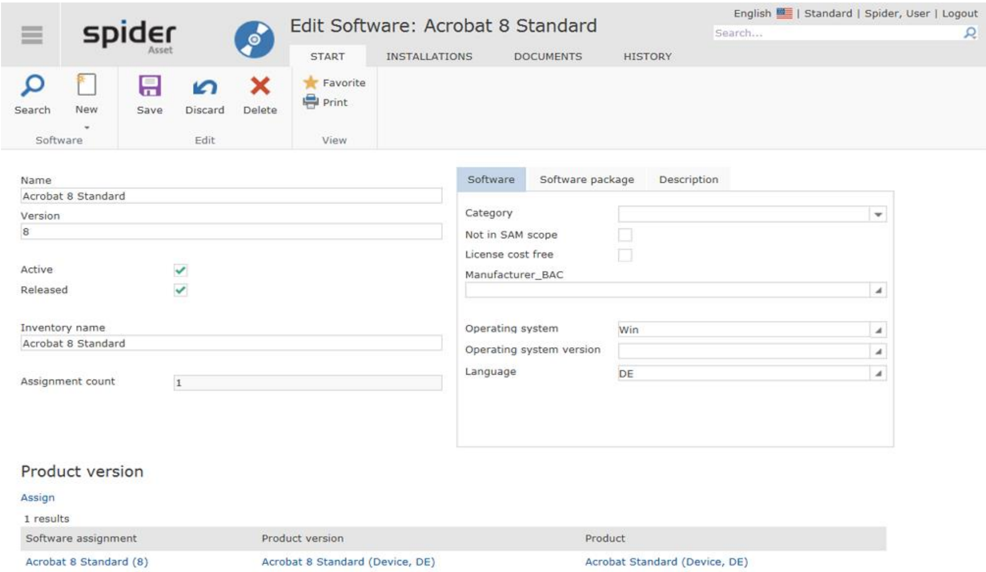
Field	Meaning
Name	The **Name** field specifies the software as it is displayed in Spider, e.g., MS Office Enterprise 2007.
Version	Use this field to enter the version name.
Inventory name	Software name in the inventory. This name depends on the inventory system and often does not correspond to the official product name.
Active	Activate the Check box **Active**, to determine whether the Software shall be ac-tive.
Released	Activate the **Released** Box when the Software is released for usage.

➢ Enter the software data in the corresponding fields and click on the **Create** ribbon button to save your input.

Edit software

- On the home page of Spider Asset, go to the menu area *Asset management* or to the **Backstage** (on page 35) and click on the **Software** menu item.
- Select the software to be edited in the search form by clicking on the identifier in the *Full name* column.

The Edit form of the corresponding software will open.



If any software is already assigned to a product version in Spider Licence, it will also be listed. Use the links to directly navigate to Spider Licence.

- Make the desired changes and click on the **Save** ribbon button to save the changes in the system.

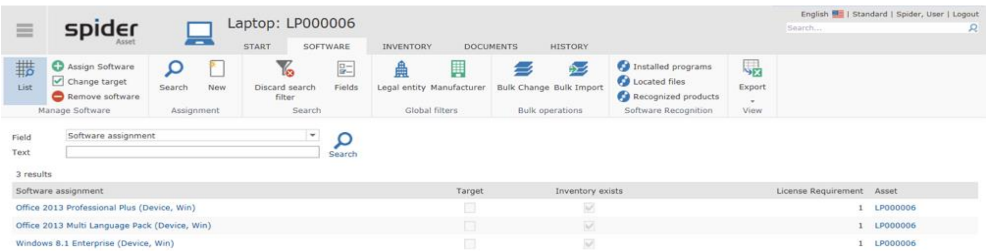
2.6.2 Software assignments

Software can be assigned to and administered for assets, employees, or function units.

Create software assignments to assets or function units

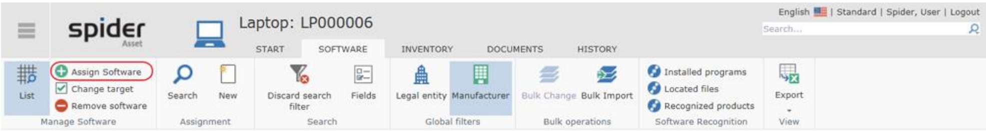
Attention	Please note for software assignments to assets or function units that only one of the two options should be used in the same installation. If the software recognition is used, the software will always be assigned to the asset.

- To assign software to an asset, go to the menu area *Asset management* or to the **Backstage** (on page 35) on the home page of Spider Asset and click on the **Asset** menu item.
- Select the asset in the search form which you want to assign software to.
- Then go to the *Software* ribbon in the Edit form of the asset.



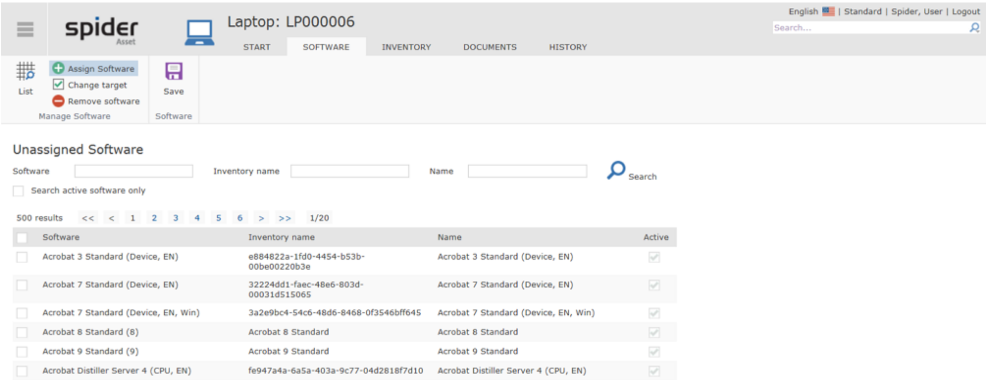
The already existing software assignments are listed.

In the Software management ribbon group, you can use the buttons **Assign software**, **Remove software,** or **Change target** to manage the software at the affected asset.



➢ Click on the **Assign software** ribbon button.

The software, which is not yet assigned, is listed.



➢ By ticking the check box in the first column, you select the software which you want to assign to the asset.

➢ Then click on the **Save** ribbon button to end the assignment process.

Note Similar to the described process, you can also create software assignments for function units.

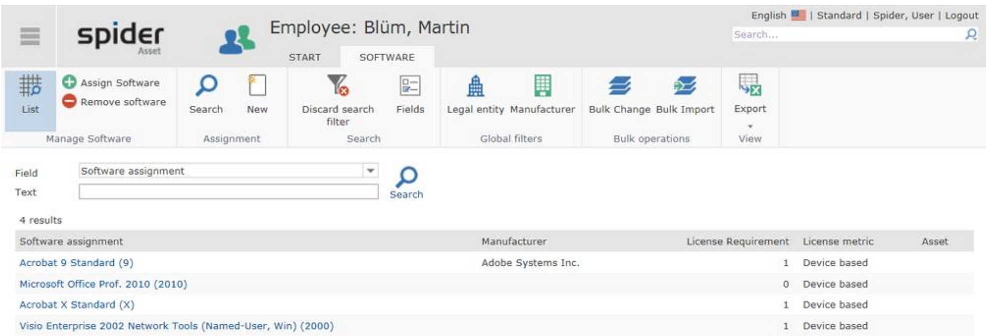
➢ To assign software to a function unit, go to the menu area *Asset management* or to the **Backstage** (on page 35) on the home page of Spider Asset and click on the **Function unit** menu item.

Create software assignments to employees

➢ To assign software to an employee, go to the menu area *Asset management* or to the **Backstage** (on page 35) on the home page of Spider Asset and click on the **View Employee** menu item.

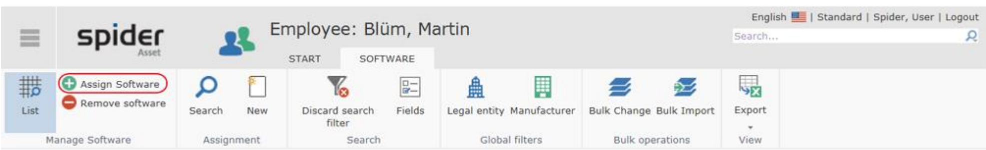
➢ Select the employee from the list, to whom you want to assign software.

➢ Then go to the *Software* ribbon in the Edit form of the employee.



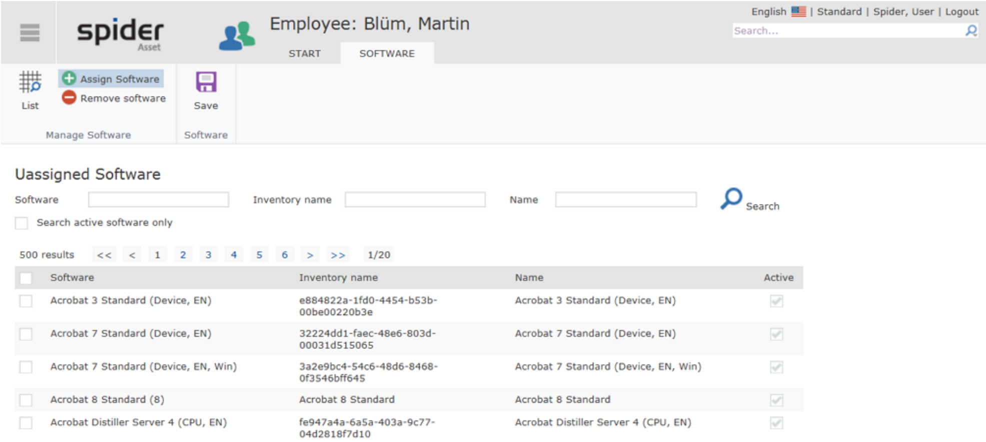
The already existing software assignments are listed.

In the Software management ribbon group, you can use the buttons **Assign software** or **Remove software** to manage the software at the affected employee.



➢ Click on the **Assign software** ribbon button.

The software, which is not yet assigned, is listed.

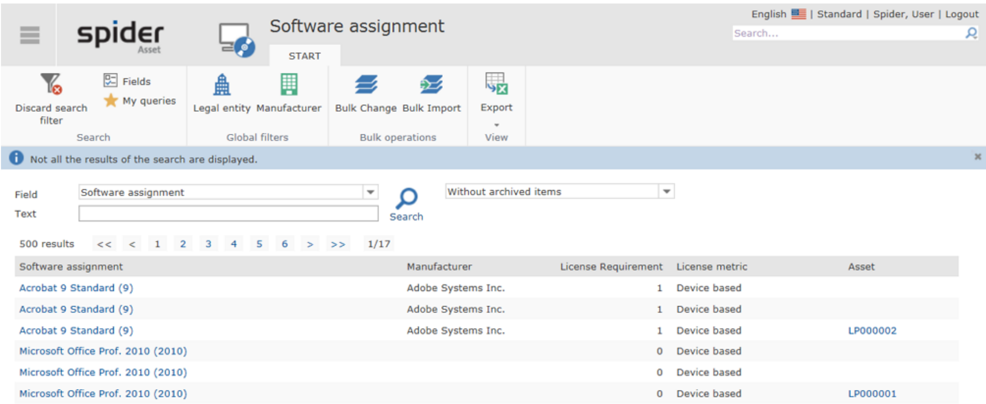


- By ticking the check box in the first column, you select the software which you want to assign to the employee.
- Then click on the **Save** ribbon button to end the assignment process.

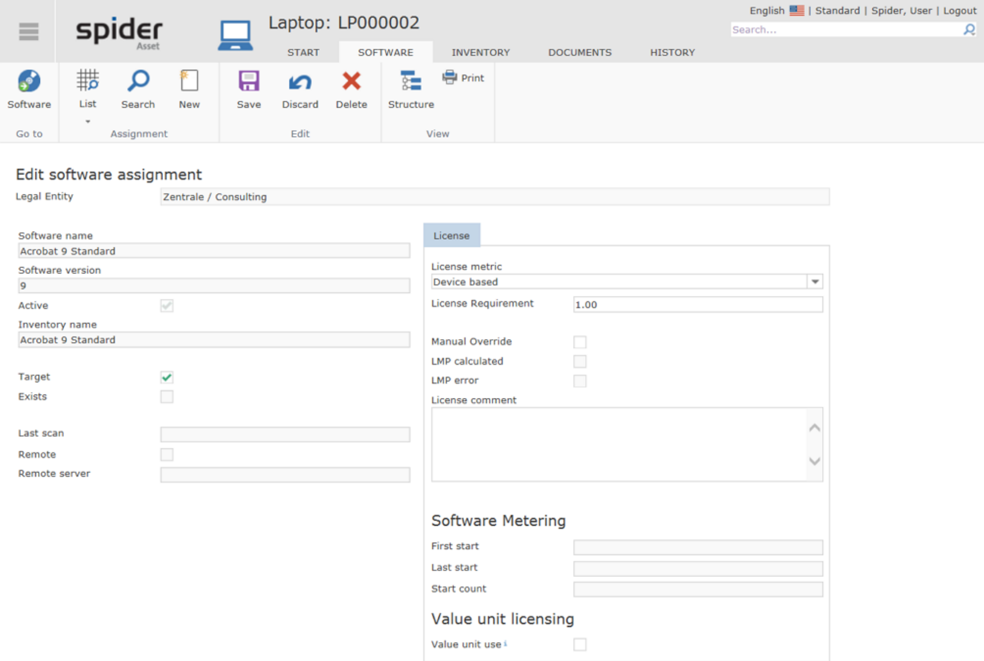
Edit software assignments

- On the home page of Spider Asset, go to the menu area *Software* or to the **Backstage** (on page 35) and click on the **Software assignment** menu item.

All software assignments are listed.



- Select the software assignment to be edited in the search form by clicking on the identifier.



- After editing the data, click on the **Save** ribbon button to save your entered data.

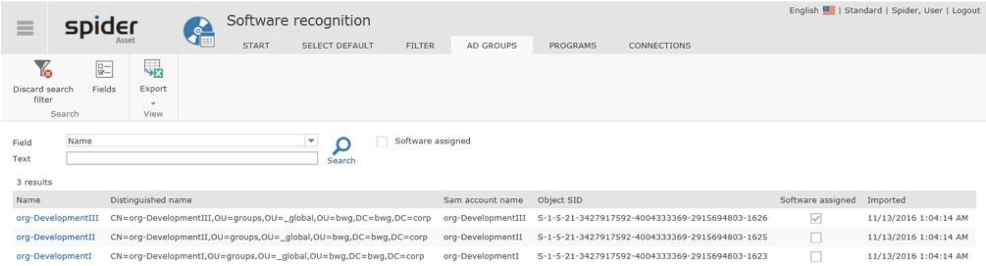
Apart from the basic data, the software assignment also contains fields which are relevant for the compliance evaluation in Spider Licence.

Field	Meaning
License metric	License metric of the software used for the calculation. By default, **DEVICE BASED** is selected. Due to the metric calculations, also the metric assignment is set automatically.
License requirement	License requirement of the software assignment. This value can be entered manually or by metric calculations.
Manual handling	If enabled, all data must be maintained manually. The data record is not considered for metric calculations which set the license requirement. Application case: Manual editing and setting of the license data.
LMP calculated	Will be set as soon as the value is available by means of a metric calculation (LMP = license metric procedure).
LMP error	An error has been returned by an LMP. A calculation for this software assignment is not possible.
License comment	Supplementary notice or explanation. In case of an error in an LMP calculation an error message will be saved.
Software metering	These fields are filled in by the software recognition or by the inventory system.

2.6.3 Active Directory groups-based Software assignments

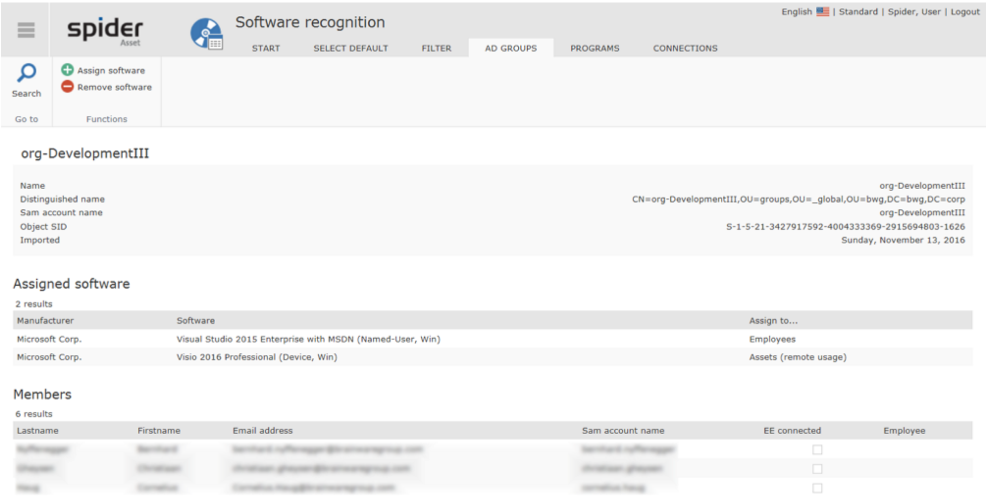
The software recognition can take over Active Directory groups and their memberships (users, groups) into the recognition database and managing them. For selected groups, software assignments are possible which are created by the synchronization process either directly at the employees (users) or as a remote usage on the assets of the employees.

➢ On the home page of Spider Asset, click on the menu item **software recognition** in the *Software* menu area or in the **Backstage** (on page 35) and go to the **AD groups** ribbon.



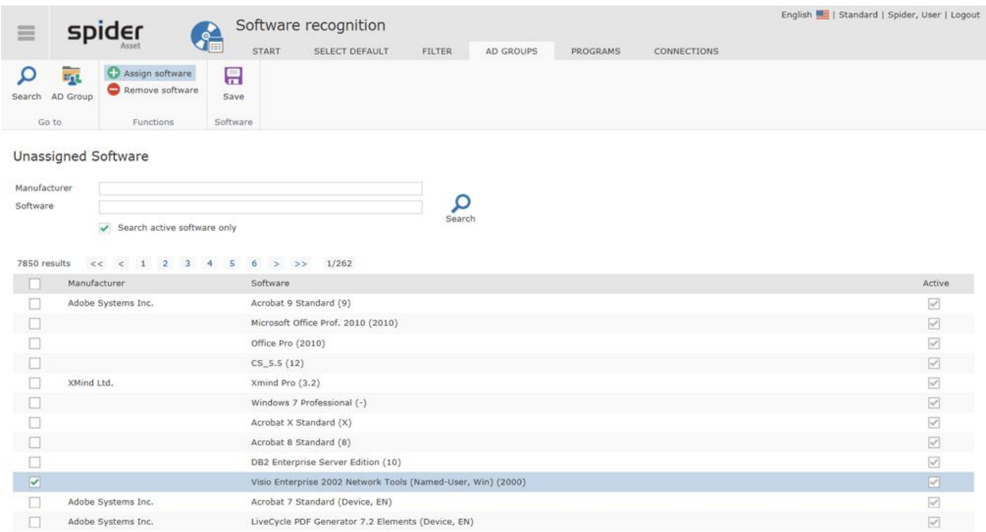
This overview shows which AD groups are assigned and which AD groups have software assignments.

➢ To know which software is assigned to a group or to create more software assignments, click on the corresponding **AD group** in the *Name* column.



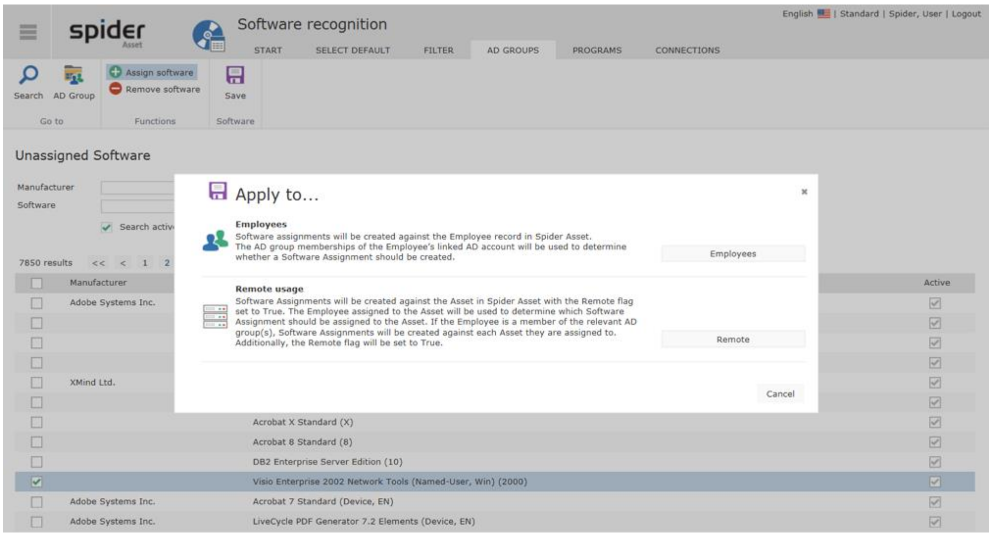
For this AD group there is already a named user assignment as well as a remote user assignment.

➢ To create more software assignments, click on the **Add software** ribbon button or on the **Remove software** ribbon button if an existing software assignment is to be removed.



➢ Activate the **check box** of the software, which shall be assigned to this AD group.

➢ Then, click on the **Save** ribbon button.



➢ Select whether the software assignment shall be created as **Named User** or **Remote User**.

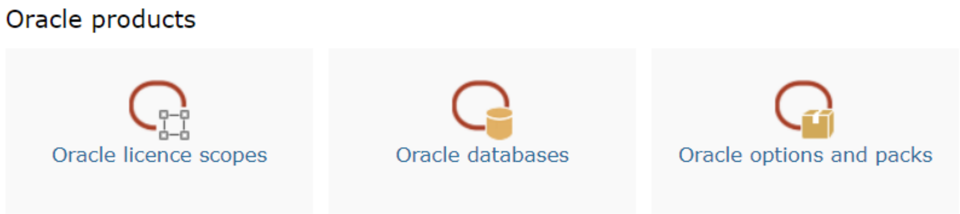
Note	The software assignments will be synchronized in the next synchronization run.

2.7 Oracle products

The Oracle licensing is based on a complex licensing model, its calculation is based on a large amount of data. For example, in a *Standard Edition* with a *Named User Plus Metrics*, the maximum number of sockets and the number of users must be monitored. However, in an *Enterprise Edition* with *Processor Metrics*, apart from the physical inventory data, such as server, processor type, cores, and the corresponding core factor, also the usage of options and management packs must be considered. If an *Enterprise Edition* is operated on a virtual system, also its partitions will influence the license calculation.

The base data required for the licensing calculation are detected across all platforms by the **Columbus Datacenter Inventory Suite** or the underlying *third-party product* and transferred to the **Spider Oracle Database Suite** which calculates the license requirement and prepares the data for the Oracle dashboard.

The functions for the Oracle products can be found in the menu area of Spider Asset and are configured as follows in the standard menu:

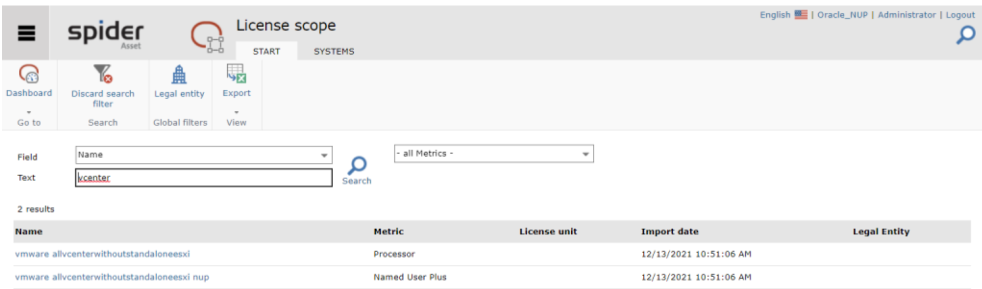


A more intuitive approach to this complex field is provided by the Oracle Dashboard.

2.7.1 Oracle licence scopes

All license scopes known to the system can be searched and filtered here.

➢ From the Spider Asset page, click the **Oracle licence scopes** menu item in the **Oracle products** menu area or in **Backstage** (see **"Backstage"** on page 35).

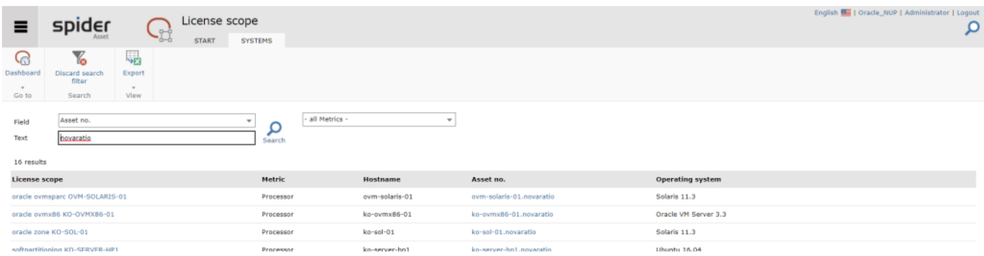


In addition to the perspective of the license scopes, you can also navigate here via the listing of the systems.

A click on the name leads to the detail page of the license scope. See the explanation in the context of the Oracle Dashboard starting on page 138.

The Systems tab

➢ Click on the **Systems** tab.

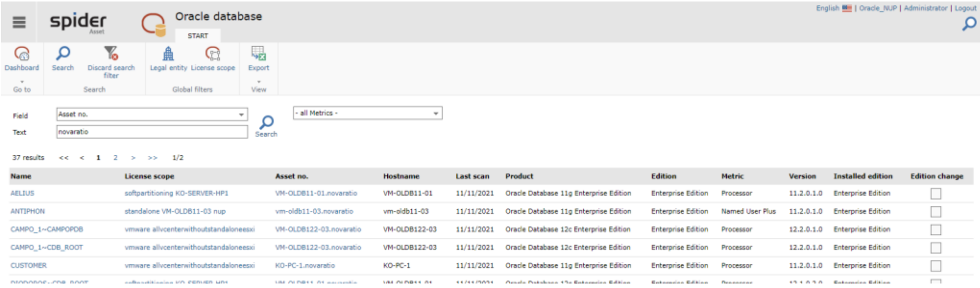


A click on an asset number leads to the edit page of the asset, a click on the license scope leads to its detail page. See the explanation in the context of the Oracle Dashboard starting on page 134.

2.7.2 Oracle databases

All Oracle databases known to the system can be searched and filtered here.

➢ From the Spider Asset page, click the **Oracle databases** menu item in the **Oracle products** menu area or in **Backstage** (see **"Backstage"** on page 35).

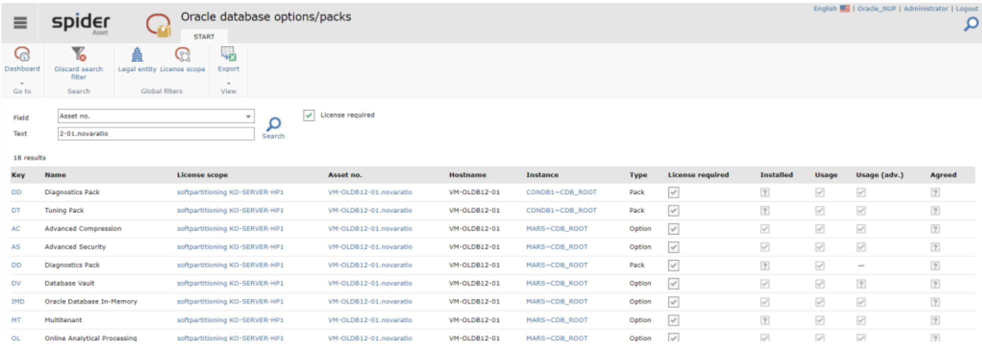


Clicking on the name will take you to the database detail page. See the explanation in the context of the Oracle Dashboard starting on page 138.

2.7.3 Oracle options and packs

All Oracle database options and packs known to the system can be searched and filtered here.

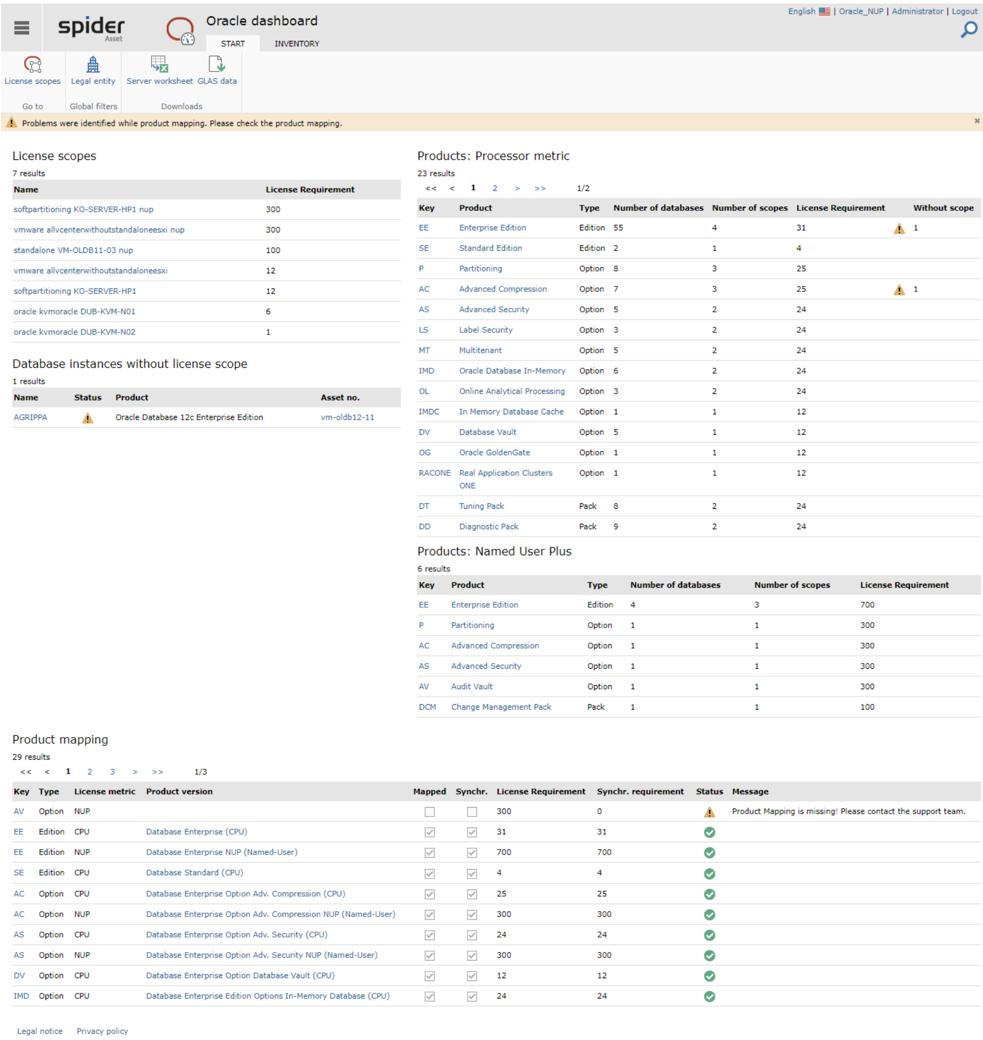
➢ From the Spider Asset page, click the **Oracle options and packs** menu item in the **Oracle products** menu area or in **Backstage** (see **"Backstage"** on page 35).



Clicking on the key leads to the database detail page. See the explanation in the context of the Oracle Dashboard starting on page 135.

2.7.4 Oracle Dashboard

➢ To open the Oracle dashboard, click on the **Dashboards** ribbon button on the home page or in the Backstage view and then click on the **Oracle Dashboard** tile.



You can find the following data in the overview:

Data fields	Description
License scopes	The license scope includes the Oracle databases which belong together regarding their licenses, the license-relevant options and management packs as well as the underlying physical and virtual systems.
Products	Products include editions, options, and management packs.
Processor metrics Named User Plus	Depending on the license type (processor or named user plus metrics), these two tables show an overview of the used products, the number of scopes and the databases as well as their license requirement.
Product mapping	Shows which products from the product catalog have been mapped and synchronized. If any problems were encountered in the process, this will be indicated in the mapping status as in the above example.

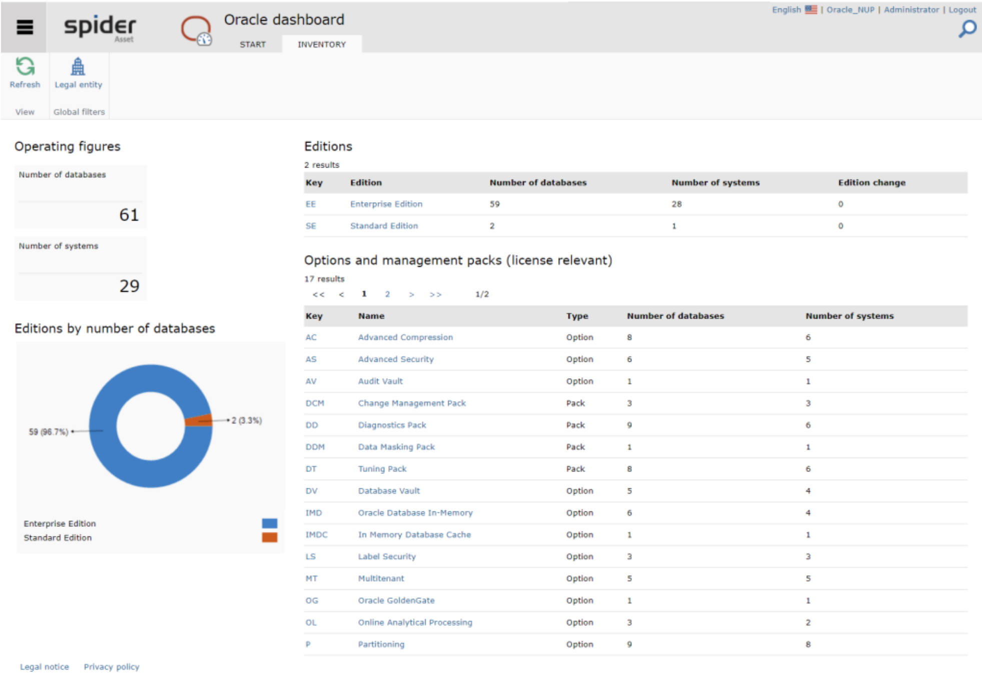
Note The various links provide access to drilldown functions, making it possible to navigate from this overview down to the base data.

In the Download section of the ribbon menu, the **Server worksheet** and **GLAS data** functions are available. The former supports an eAssessment with a summary of the data in an Excel data sheet.

The GLAS data is available if it has been imported into the system at least once. Only the last data set is downloadable.

The tab “Inventory”

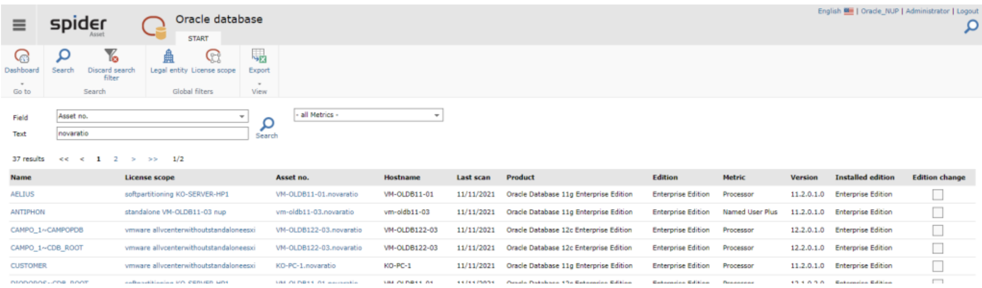
➢ To get directly to the inventory data, go to the **Inventory** ribbon.



You can see from the key figures how many databases of each edition are installed on how many servers. The two tables on the right side show the installed editions and their license-relevant options and management packs.

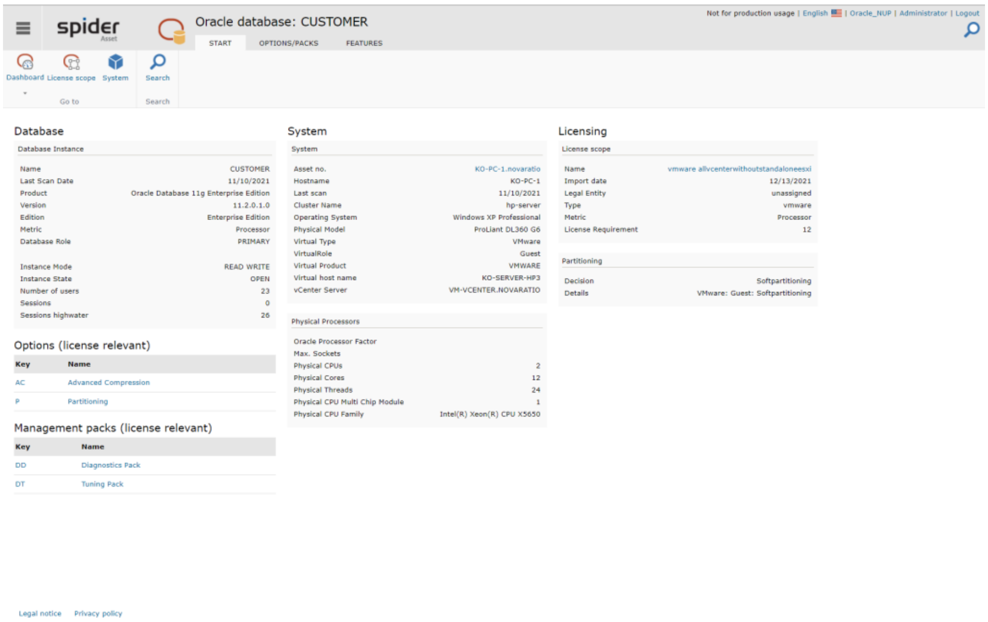
Oracle database

➢ With one click on the **key** or the **edition**, you can view a list of the installed instances.



Note	How many instances are installed on the same hardware is not relevant for the Oracle licensing with processor-based metrics.

➢ In the first column *Name*, click on the **Database** which you want to have a closer look at, e.g., CUSTOMER.



On the level of the database instance, you will see the following inventory data:

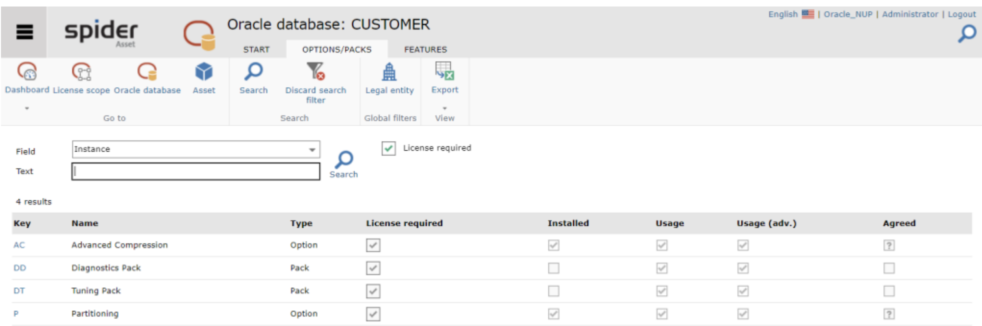
Data field	Description
Database	An instance does not only describe the database itself but must always be seen in combination with the used options and packs. Additionally, the usage of this instance is shown.
System	Points to the physical or virtual system where the database is installed. Use the asset no. to go directly to the corresponding object in Spider Asset.
Options	The options and management packs used by this instance will be listed. Why these components are license-relevant can be seen in the short version or the decision tree (*).
Management packs	
Physical Processors	The hardware to be licensed, respectively the processors are listed here.

(*) Why an option or a management pack is license-relevant under the given circumstances, will be explained in detail one level below in the decision tree.

The tab “Options/Packs”

➢ From the **Database** details page click on the tab **Option/Packs**.

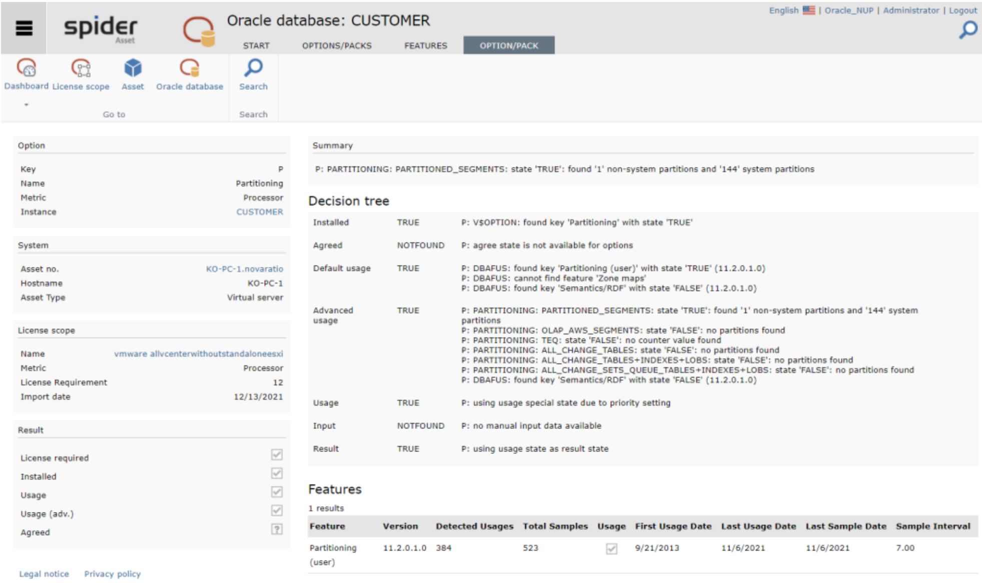
The search page already breaks down the criteria according to which the available options and packs are prequalified by Spider. If you also want to show those for which Spider has concluded that they are not license-relevant, you must uncheck the License required checkbox by clicking on it.



Result	Description
License required	Summary is license relevant.
Installed	Option or Management Pack is installed.
Usage	Usage of the Option/Mgmt Packs identified based on the feature us-age evaluation.
Usage (adv)	Usage of the Option/Mgmt Pack identified based on additional checks.
Agreed	Only possible for management packs if accepted.

If the overview is not sufficient to understand the decision, the decision tree can be consulted on the details page.

➢ Click on the **key** of the option or the management pack.



You can navigate to the same page by navigating to the OPTIONS/PACKS ribbon and clicking on the **key** of an option or a management pack.

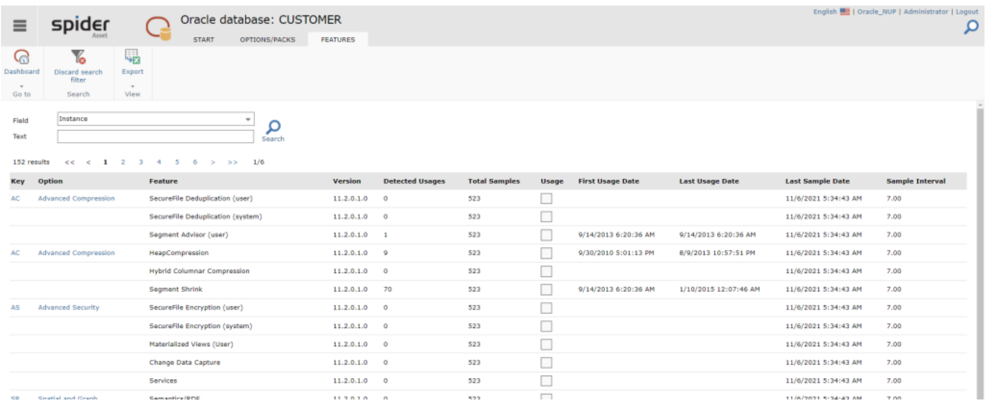
The decision tree shows how the system concluded that an option or package is license relevant. For this purpose, the import data is listed and evaluated according to criteria. At the end, the result is the assessment of whether it is relevant (true) or not (false).

The Result tile also lists other general conditions, as far as they can be determined. If such a condi-tion cannot be determined without doubt by machine, it is marked with a question mark.

The “Features” tab

If features can be assigned to options or packs, they are listed in the Features table.

➢ Navigate to the **FEATURES** ribbon tab.



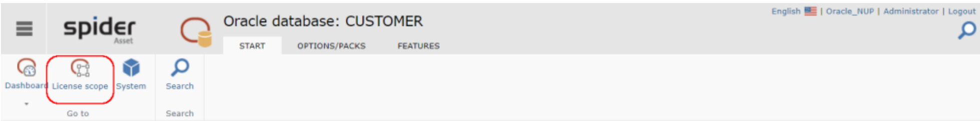
The table provides information on whether and when which features were used.

License scope

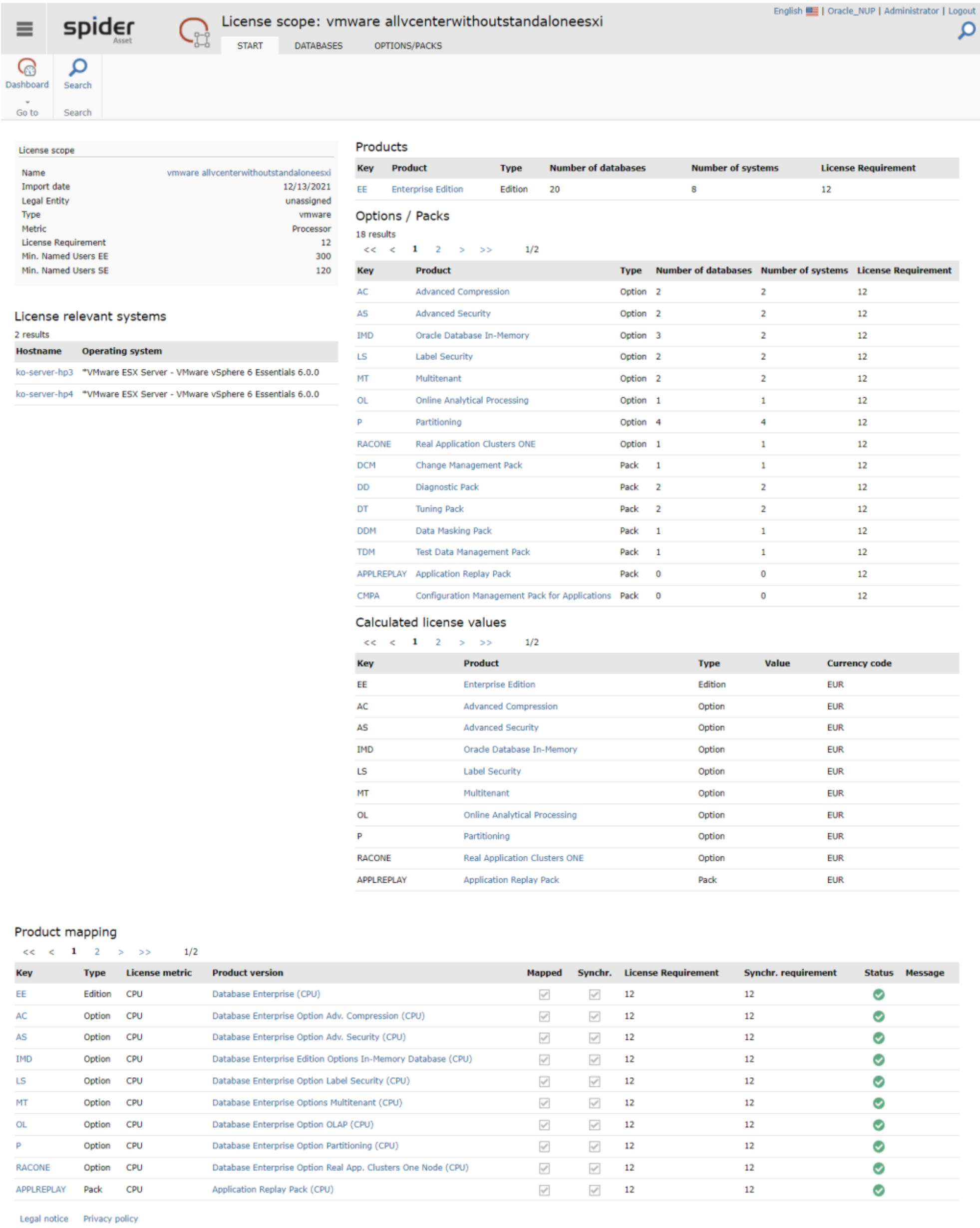
The license scope includes the Oracle databases which belong together regarding their licenses, the license-relevant options and management packs as well as the underlying physical and virtual systems. When using virtualization, the corresponding Oracle license rules of the virtualized environment (soft- vs. hard-partitioning) and the basic processor value will also be considered.

If the licensing is calculated with processor metrics, the license requirement will be calculated considering the underlying hardware, its processors and cores, the process factor and then shown in the license scope.

A license scope can be called from the dashboard as well as out of an instance.



➢ Click in the dashboard on the corresponding **link** or in an instance on the **License scope** ribbon button.



Result	Description
License relevant systems	Systems that are license relevant are listed here.
Products	Editions used
Options / Packs	Used options / packs are listed here.
Calculat5ed license values	Shows license relevant editions, options and packs and lists the license costs for each (if they are maintained on the software).
Product mapping	Shows which product versions have been mapped and synchronized.

The tabs Databases and Options/Packs are structured analogously to the above description. Data focus is the selected license scope.

Details about the **DATABASES** tab can be found in chapter **Oracle database** on page 135.

Details about the **OPTIONS/PACKS** tab can be found in the chapter **The tab “Options/Packs”** on page 136.

2.8 License metrics procedures (LMP)

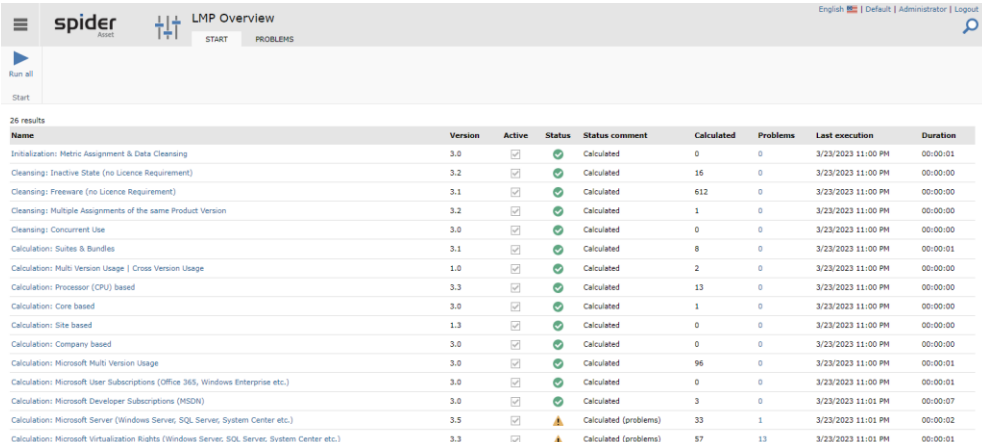
The calculation of the license requirement is done by means of license metrics procedures (LMPs). The license requirement in Spider Asset is calculated based on the license agreement as far as possible. In practice, there are lots of different license agreements of various manufacturers. For example, in case of device-based license metrics, a simple 1:1 relation between installed software and license is considered. For CPU/processor-based license metrics, however, you must consider the number of available CPUs as well as the CPU type for the calculation. The calculations become even more complex in cluster systems or if dynamically assigned resources must be considered.

Note	Which type of license metrics are in use is set in the system configuration.

2.8.1 LMP Overview

In the LMP overview all entered license metrics procedures (LMPs) are listed.

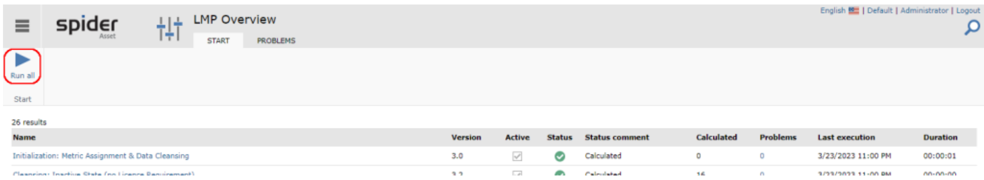
➢ On the home page of Spider Asset, go to the menu area *Settings* or to the **Backstage** (on page 35) and click on the **LMP overview** menu item.



The overview indicates which LMPs are active, when they were executed the last time and whether the execution has been successful (status *Calculated*).

Note	Apart from the daily calculation, you can use this from to force additional calculations manually.

➢ Click on the **Run all** ribbon button.



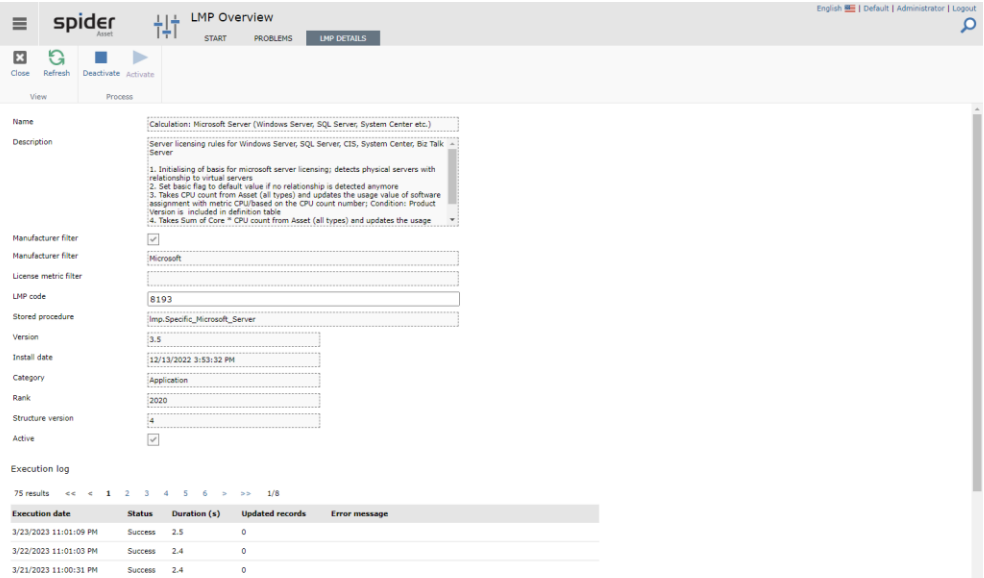
The status will shortly change to *Pending* until the license metrics procedures are finished. A banner indicates that the calculation is running.

After completion of the license metrics procedures, the status is displayed with the new execution date.

Note	This page reloads automatically.

2.8.2 LMP Details

- Click on an individual LMP in the LMP overview.

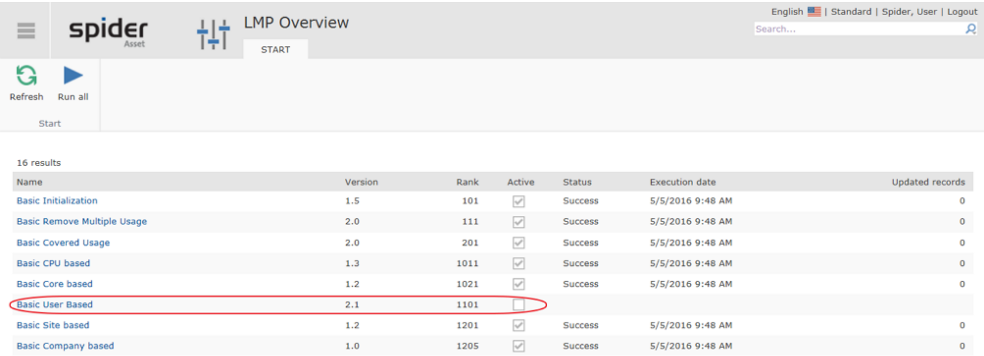


The LMP details will specify whether it is an LMP which has been delivered with the product (category *Application)* and whether this LMP has been activated.

The execution protocol contains information about when the LMP has been executed, its status, how long it has run and how many records have been updated during the process.

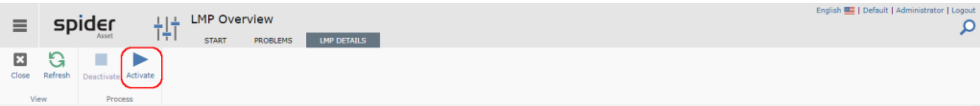
2.8.3 Activate/deactivate LMPs

The LMP overview shows all entered LMPs.



Note For the first installation, the LMPs are delivered in activated state, however, for updates they are deactivated. If you require an LMP, you must activate it in the LMP details.

- To do this, click on the **Activate** ribbon button in the LMP details.



Use this form also to deactivate an LMP.

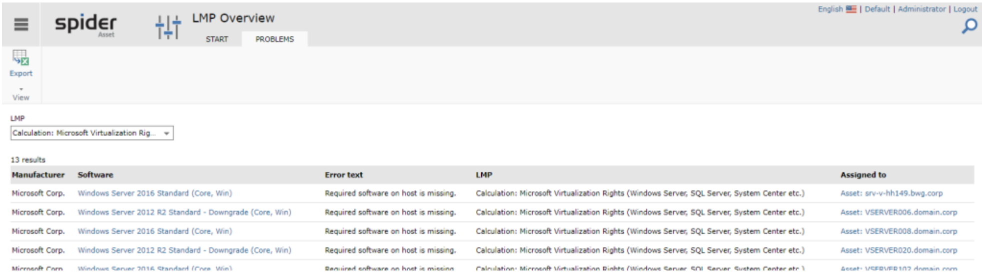
- Click on the **Deactivate** ribbon button.

2.8.4 LMP Problems

If problems occurred during the calculation, this is shown in the overview.

- ➢ Click on the **Link** to get to the **Problems** tab.

The entries on the **Problems** tab show the problem occurred during calculation. From this page you can jump directly to the software or to the assigned asset.



A drop-down control allows to narrow the result list down to problems concerning the selected LMP.

2.8.5 Coverage rules

The Suites & Bundles license metric procedure determines license needs for one product by the presence of another product. For example, the license requirement for a *Microsoft Word* Software assignment is covered by a *Microsoft Office* Software assignment on the same Asset.

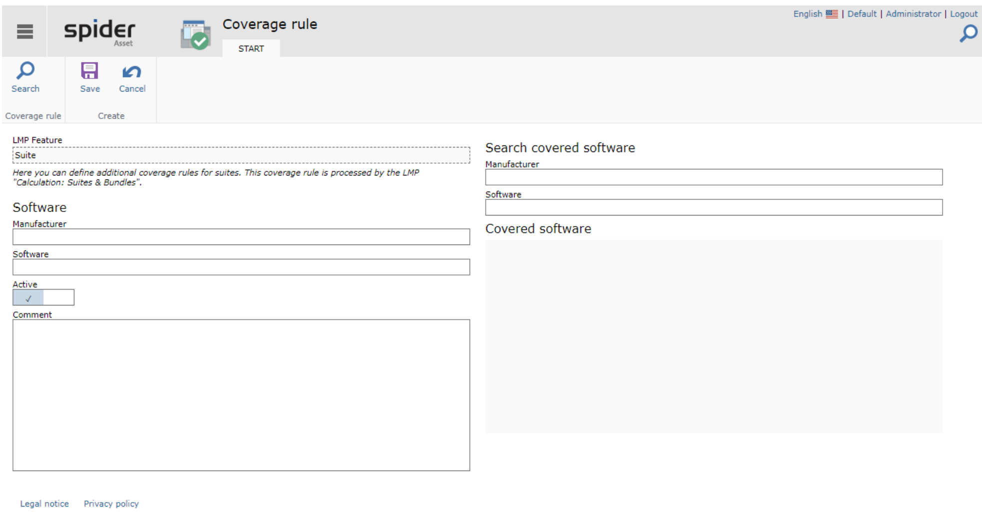
Bundles are numerous and therefore not always covered by Spider. In case of missing coverage, it can be added by the user.

Note Coverage rules have no effect on whether a software is assigned or not. They focus on multiple software assignments at an object and changes the required usage rights.

The coverage rule search is a standard search without bulk operations.

Create a coverage rule

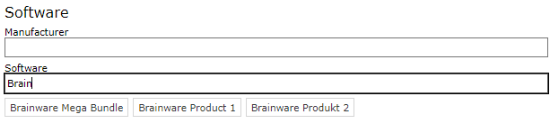
- ➢ Click the **New** ribbon button in the search page.



The LMP Feature is named “Suite” and cannot be changed.

In the left column, the parent software can be configured. Clicking on Vendor-leads opens the vendor selection dialog. This limits the input in the Software field to the selected manufacturer. Software is a free text field.

➢ Start the input in the Software field to see result tiles.



➢ Click on ***one*** result tile, in this example on *Brainware Mega Bundle*.

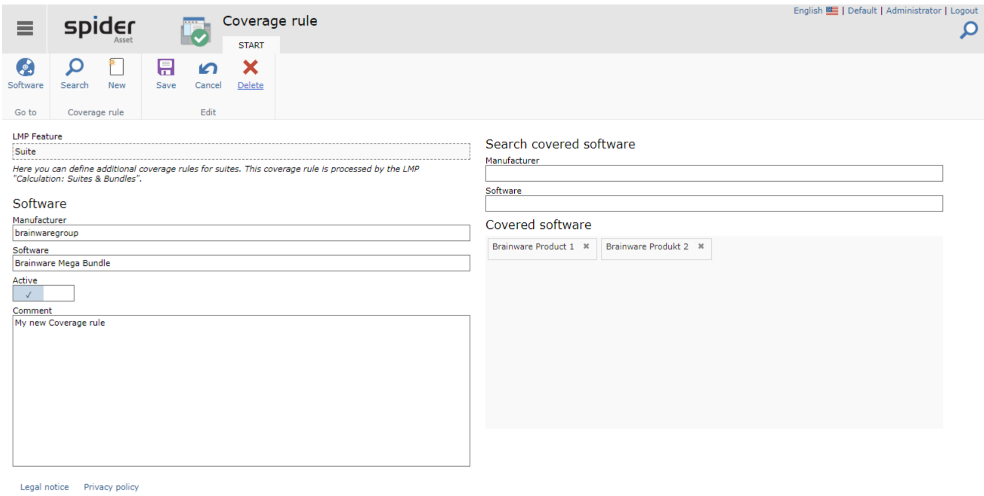
With selection of the software also the manufacturer is set automatically.

The configuration of the covered software works analogously: Entering starting to enter the name of the desired software also starts the search process and displays the results as small tiles below the text box:

➢ Click ***on one or more*** result tiles, in this example *Brainware Product 1* and *Brainware Product 2*.

➢ Click Save to apply the coverage rule.

The Edit page for the created coverage rule appears:



After making changes to a rule or if it is newly created, the LMPs must be run again to observe the effect.

Attention	If the LMP Suites & Bundles is deactivated, also the custom coverage rules will not be executed.

2.9 Metering

Use the Metering function for optimum usage of all resources, be it assets or software. Most companies have a considerable optimization potential regarding unused or rarely used programs. Before purchasing new licenses, it might make sense to obtain an overview of program usage. The metering functions in *Spider* will show you the results about the Software usage clearly represented.

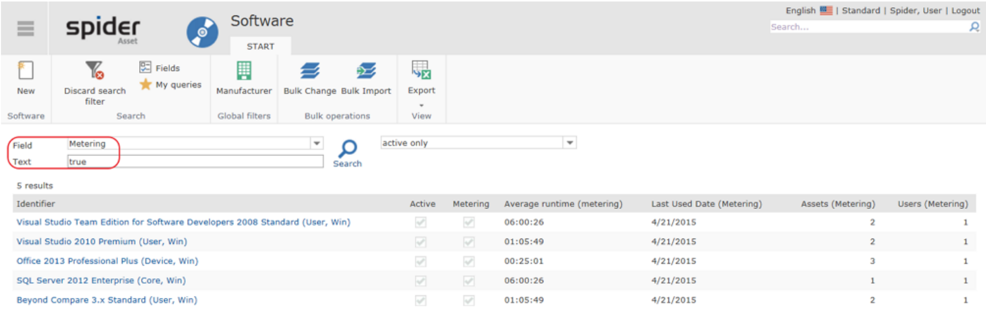
Note	Whether metering data are available for an asset, is **determined** (see "**Data sources**" on page 65) by the *Spider Data collector* or by the *Columbus Inventory Agent*.

2.9.1 Software metering for the Software object

If metering data are available for a software, they will be indicated in the Edit form of the software.

➢ On the home page of Spider Asset, go to the menu area *Software* or to the **Backstage** (on page 35) and click on the **Software** menu item. Then select Text = **true** in the field search **Metering**.

All programs are listed which have metering data available.



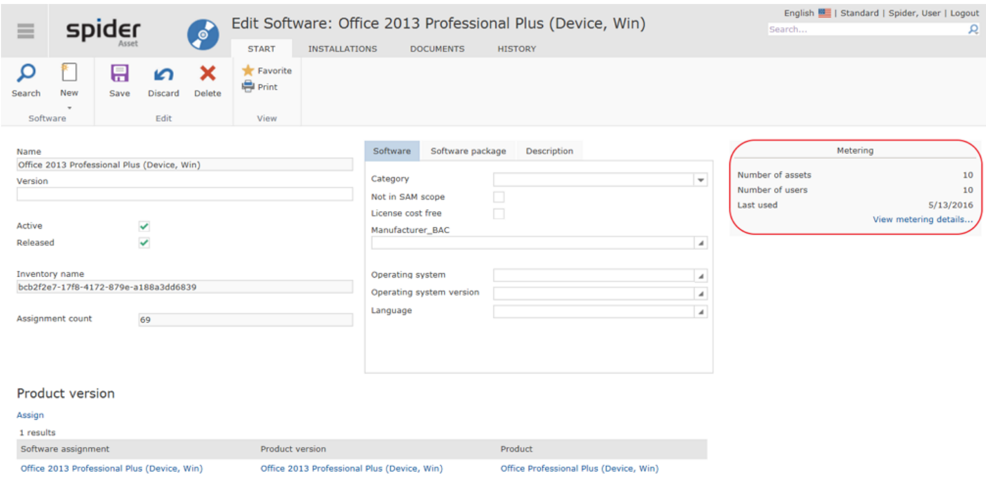
Note By default, the columns with metering data are not shown in the Search form of the software. **Select** (see "**Customize search results - Field selection**" on page 57) the corresponding fields in the field selection.

This table shows the following information:

Column	Description
Identifier	Name of the software.
Active	Depending on the search criterion, only active software.
Metering	Shows the software with available metering data.
Average running time	Shows the average running time per day.
Last used date	Shows the date of the last usage.
Assets (Metering)	Shows the number of assets on which software with available metering data is installed.
Users (Metering)	Shows how many users have used the software on this asset in the last 90 days.

➢ Select the software to be edited in the search form by clicking on the Identifier.

The Edit form of the corresponding software will open.

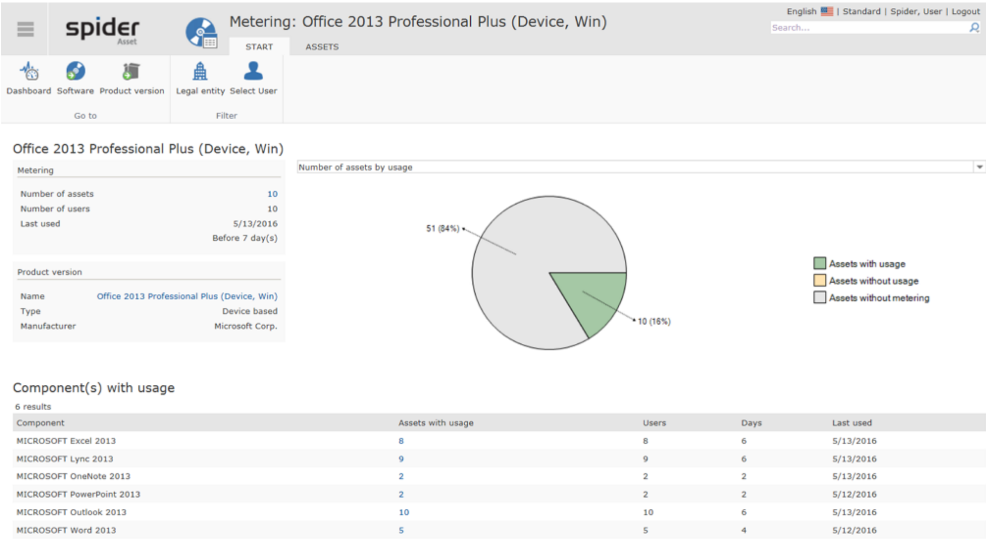


A short information about the software usage will be shown on the right side.

2.9.2 Detailed metering evaluation

➢ Click in the *Edit software* form on the link **View metering details**.

This will take you to the Metering form which contains the structured measuring results of this software.

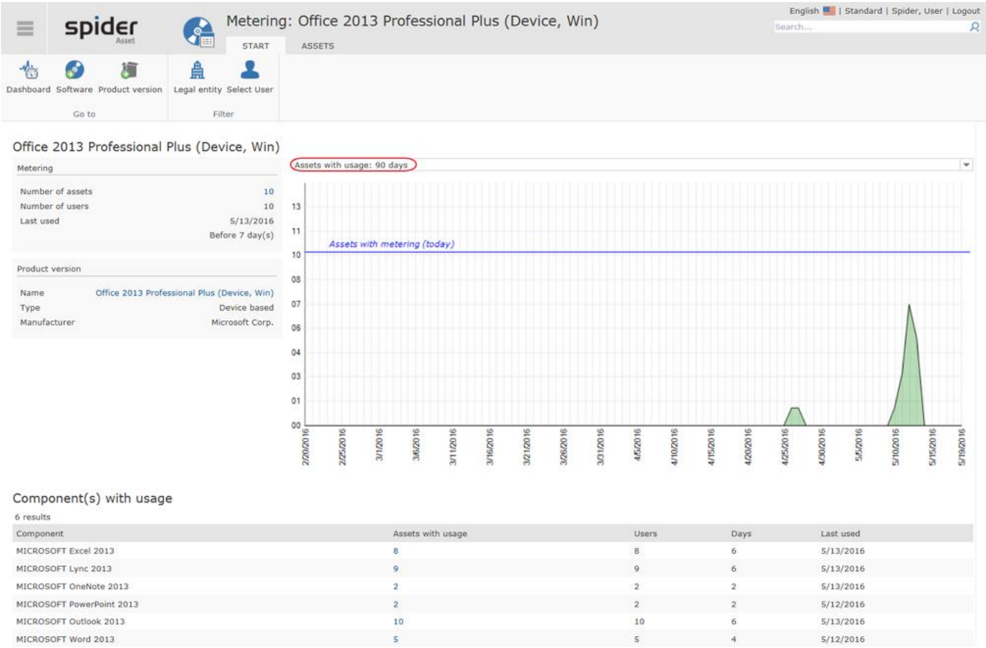


Description of the key data:

Field		Description
Diagram	gray	The software is installed on these assets, but no metering data are collected.
	green	These assets have available metering data. Furthermore, the software has been used in the last 90 days.
	brown	These assets have an active metering, but the software has not been used in the last 90 days.
Metering	No. of assets	Number of assets on which the software is installed, and metering data are collected. The assets, which do not provide any metering data, are not contained in this list. You can obtain an overview of these assets by either navigating to the **Asset ribbon** or by clicking on the **number**.
	No. of users	Number of users who have used this software during the last 90 days.
	Last used	Date of the last usage.
Product version		This will show the product version or license this software is covered by. You can jump directly from the name to the *product version* in Spider Licence.
Components with usage		If the software is a suite such as in this example, the usage of the individual components is shown in this table. Via the column *Assets with usage*, you can display an overview table of all assets on which the corresponding component is installed and has been used. ➢ Click on the **number** of each component.

If you want to view the usage over time,

➢ select the desired view in the selection field.

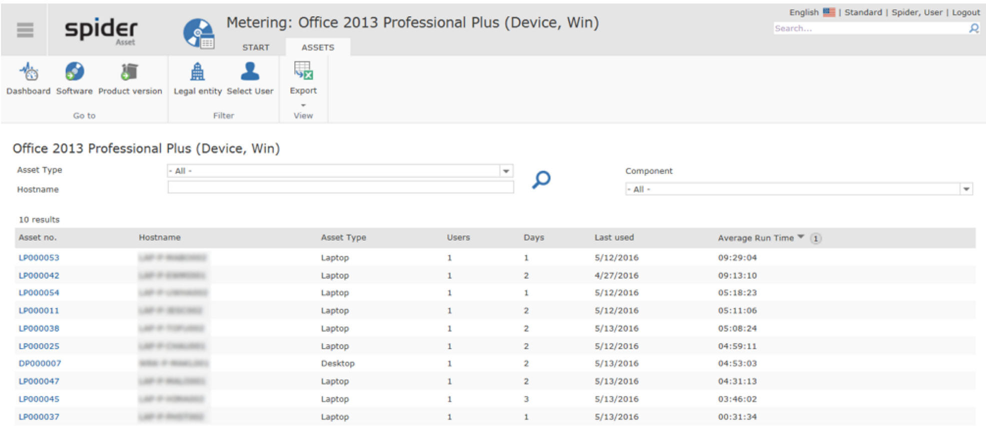


This example shows the assets with usage during the last 90 days.

Note The metering key numbers can be filtered by **Legal entities** or **Users**. To do this, use the functions in the *Global filters* ribbon group.

Assets with Metering

➢ Navigate in the Metering form to the **Assets** ribbon.



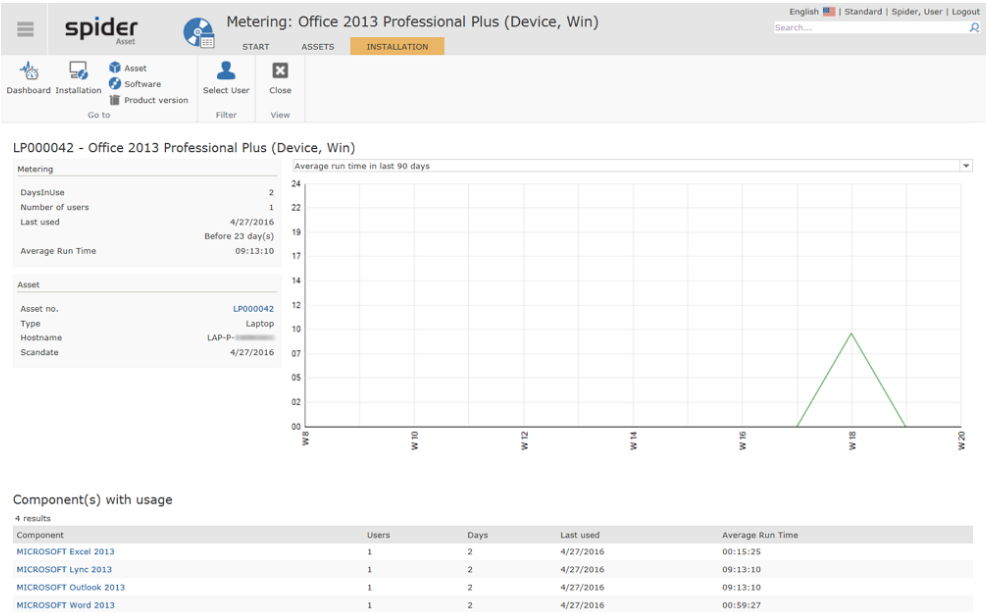
If sorted by average running time per day, you can see instantly on which asset the software has been used rarely or not at all during the last 90 days.

Note The metering key data can be filtered by **Legal entities, Users** or by **Asset type**, **Component**, **Host-name**.

The table shows on which assets the software is installed and how it used:

Column	Description regarding usage
Users	Number of users who use the software on this asset.
Days	Number of days on which the software on this asset has been used during the last 90 days.
Last used	Date of the last usage.
Average running time	Average running time per day.

- In the column *Asset no.* click on a single asset to analyze the metering data of the corresponding software on this asset.



The diagram shows the average usage of the software per day on the time axis.

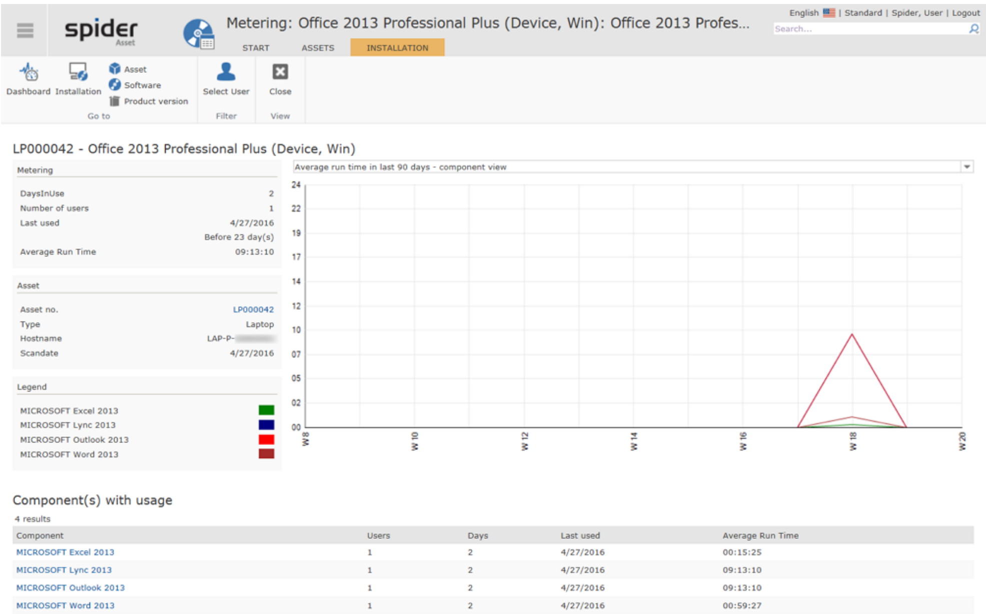
- Select the desired period (30 / 90 days) for the view of the *average running time*.

If several users use the software on this asset, the evaluation can be carried out per user.

- To do this, click on the **Select user** button in the *Filter* ribbon group.

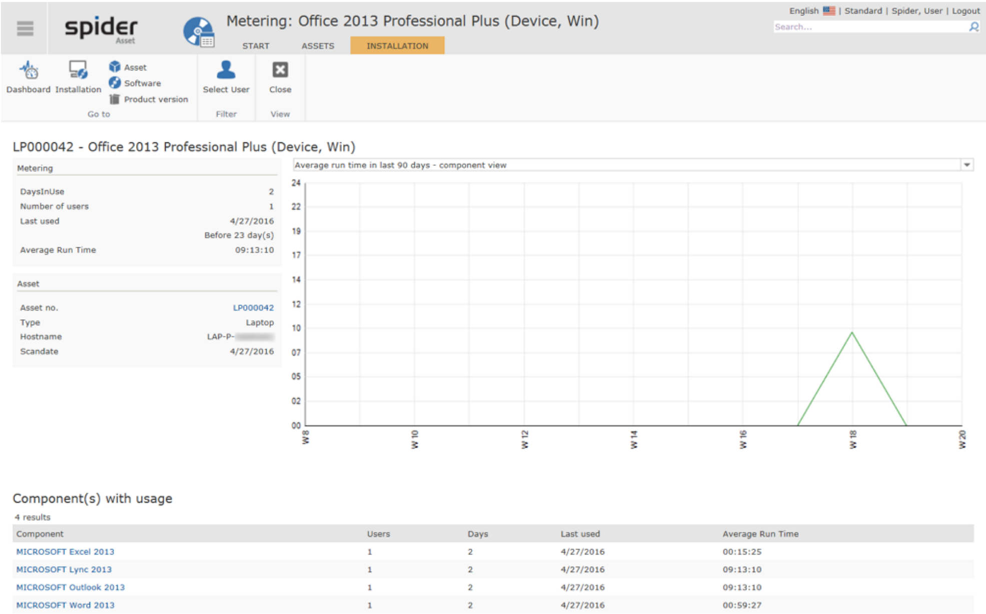
In case of a suite, you also have the option to view the average running time of each component.

- To do this, select the view: *Average running time in the last 90/30 days - Component view.*



If you want to indicate the usage of one single component,

➢ select the desired component in the grid *Component(s) with usage*.



In this example, the usage of the component *Outlook 2013* is indicated over the last 90 days.

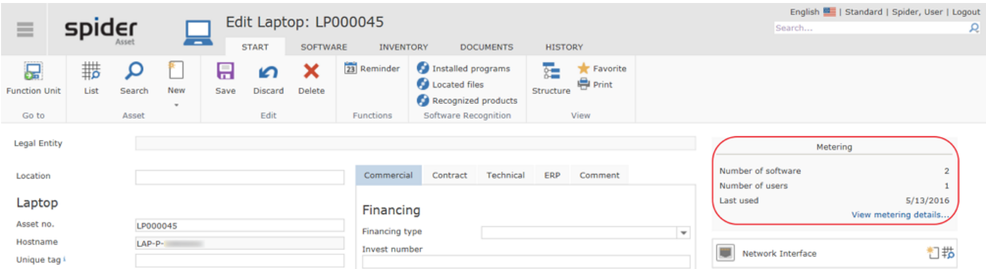
Navigation

The ribbon offers you the following navigation options:

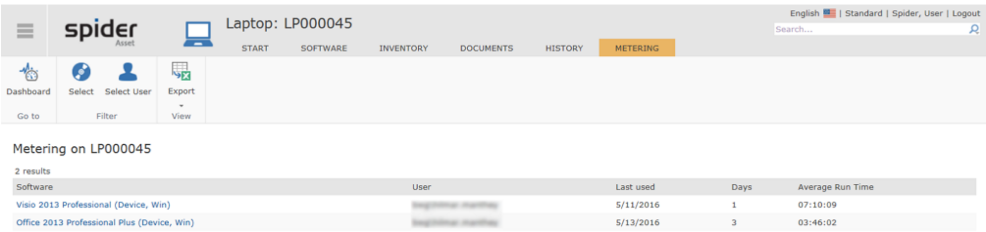
Ribbon group	Ribbon button	Navigates to:
Go to	Dashboard	Metering Dashboard.
	Software	Edit form of the software
	Product version	Product version

2.9.3 Software metering for the Asset object

If software with activated metering is installed on an asset, a brief information about the software usage is shown on the right side of the Edit form of the asset.



➢ Click on the link **View metering details** in the *Edit asset* form.

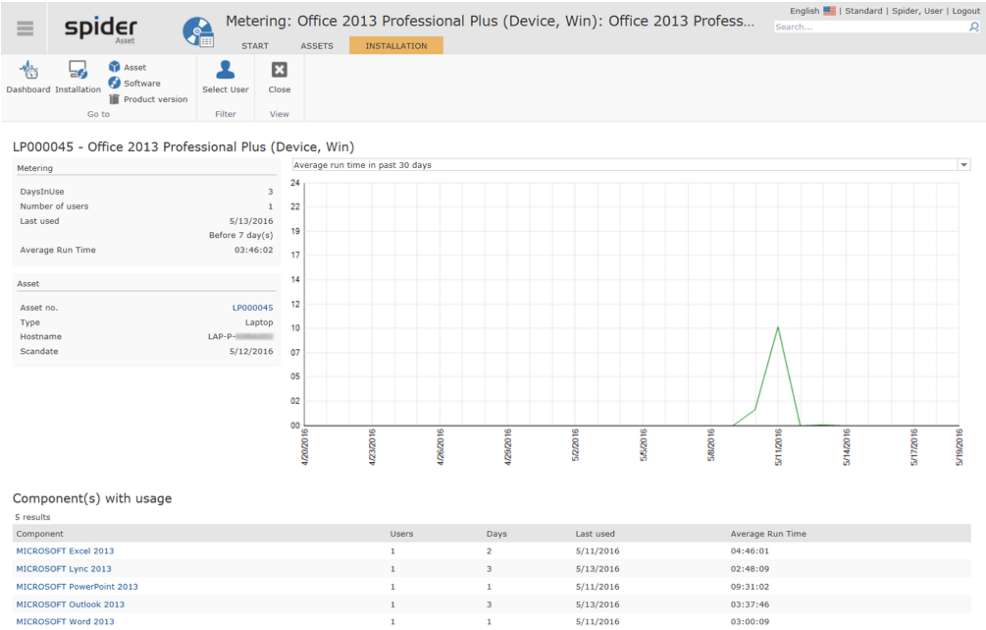


All software is listed for which metering data is available on this asset.

This table shows the following information:

Column	Description
Software	Full name of the software.
Users	Shows which users have used the software on this asset in the last 90 days.
Last used	Shows the date of the last usage.
Number of days	Shows the number of days on which the software on this asset has been used during the last 90 days.
Average running time	Shows the average running time per day.

➢ To navigate to the detailed metering evaluation of a certain software, click on the corresponding *link* in the **Software** column. For example, use the link: *Office 2013 Professional Plus (Device, Win)*.



The diagram shows the average usage of the software per day on the time axis.

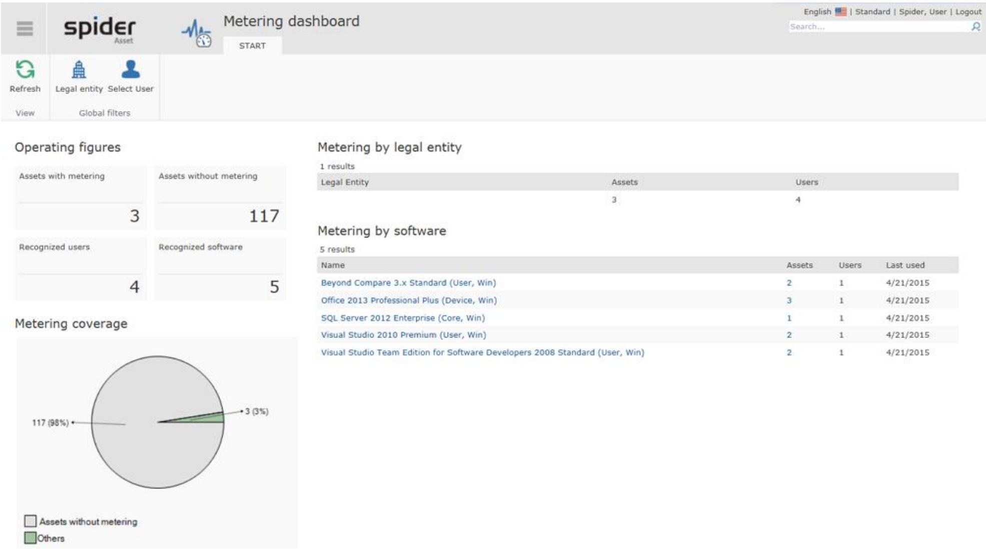
➢ Select the desired period (30 / 90 days) for the view of the *average running time*.

In case of a suite, you also have the option to view the average running time of each component.

➢ To do this, select the view: *Average running time in the last 90/30 days - Component view.*

2.9.4 Metering dashboard

The metering dashboard shows how many assets have available metering data and for which software on these assets it is possible to create metering evaluations.



Note The metering key numbers can be filtered by **Legal entities** or **Users**. To do this, use the functions in the *Global filters* ribbon group.

If global filter criteria are used, they will be shown in the *Global filters* field.

➢ By clicking on the **cross**, you can reset a selected filter.

Description of the key data:

<table>
<tr><th>Field</th><th></th><th>Description</th></tr>
<tr><td rowspan="2">Metering coverage (diagram)</td><td>gray</td><td>These assets do not have any metering data. Depends (see "Data sources" on page 65) from the Spider Data Collector or from the Columbus Inventory Agent.</td></tr>
<tr><td>green</td><td>These assets have available metering data.</td></tr>
<tr><td>Metering by legal entity</td><td colspan="2">This table contains the number of assets and users with active metering per legal entity.
To filter by a certain legal entity, click on the corresponding link in the ribbon menu.</td></tr>
<tr><td>Metering by software</td><td colspan="2">This table lists all software with available metering data. The other columns show the number of users and the date of the last usage.
To filter by a certain software, click on the Link.
To navigate to the assets, click on the number in the Assets column.</td></tr>
</table>

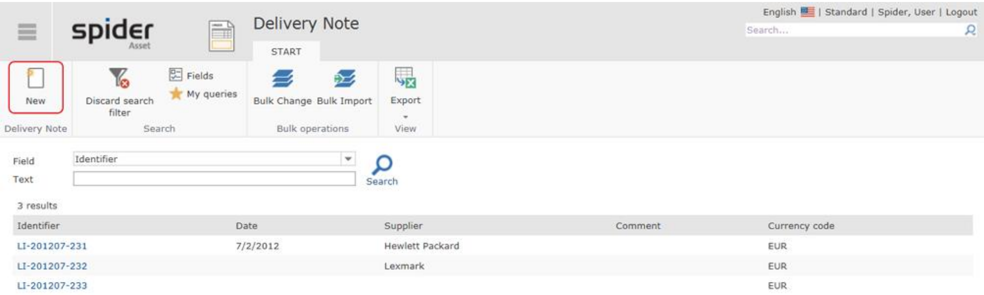
2.10 Asset master data

2.10.1 Delivery notes

Use the Delivery note object to group assets to be able to trace when and with which delivery an asset has been delivered. Usually, an asset will be assigned to a delivery note.

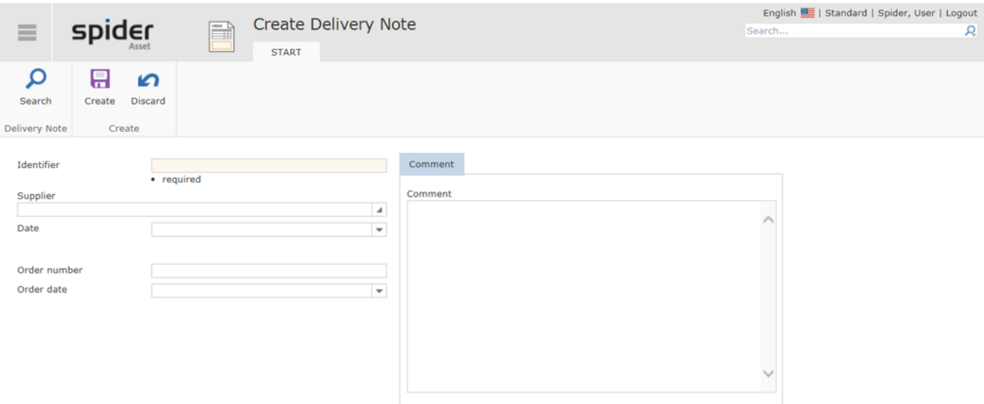
Create delivery notes

➢ To create a delivery note, go to the menu area *Master data* or to the **Backstage** (on page 35) on the home page of Spider Asset and click on the **Delivery note** menu item.



➢ Click on the **New** ribbon button in the delivery note search or in the Edit form of a delivery note.

The form for entering the delivery note data will open.



➢ The data fields which must be filled in are marked as mandatory fields. Fill in the corresponding fields and click on the **Create** ribbon button to save your entered data.

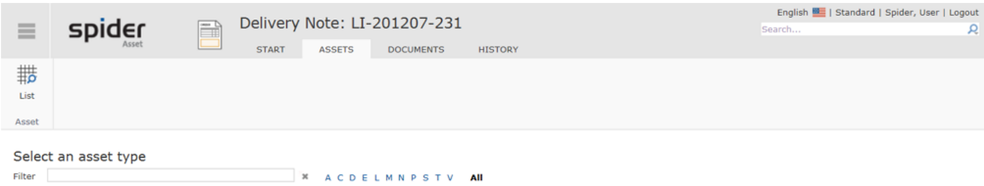
Note	Alternatively, you also can create a new delivery note from the Edit form of an existing delivery note.

Edit asset assignments on delivery notes

Create new asset and assign it simultaneously

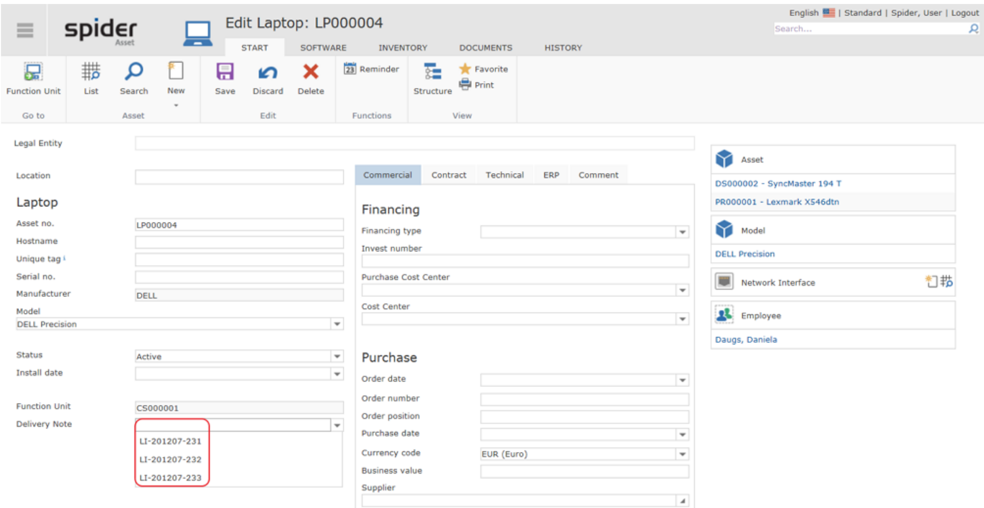
After creating a delivery note, you can create a new asset immediately by clicking the **New** ribbon button in the *Assets* ribbon of the *Edit delivery note* form.

This will cause an automatic assignment of the asset to this delivery note.



Assign delivery note to an existing asset

If you want to assign a delivery note to an existing asset, you can do this in the *Edit form* of the asset. In the *Delivery note* field the corresponding delivery note can be selected and assigned to the corresponding asset.



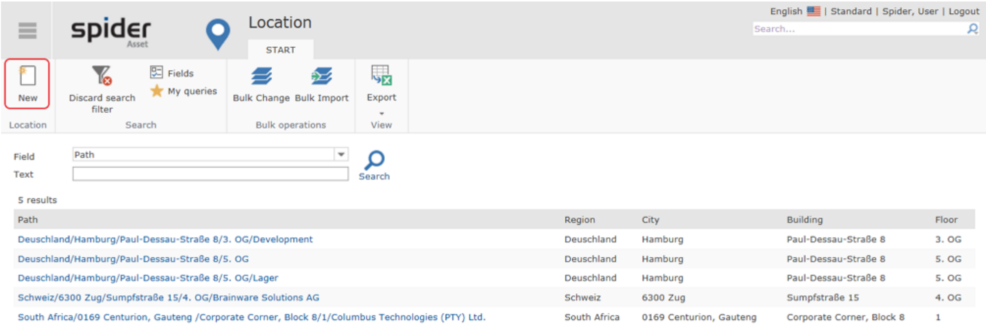
➢ After selecting the delivery note, click on the **Save** button to save your entered data.

2.10.2 Locations

Use the Locations object to create different locations which can be administered in a centralized place in Spider Asset. The location allows for the assignment of function units and assets to a precise, geographical location.

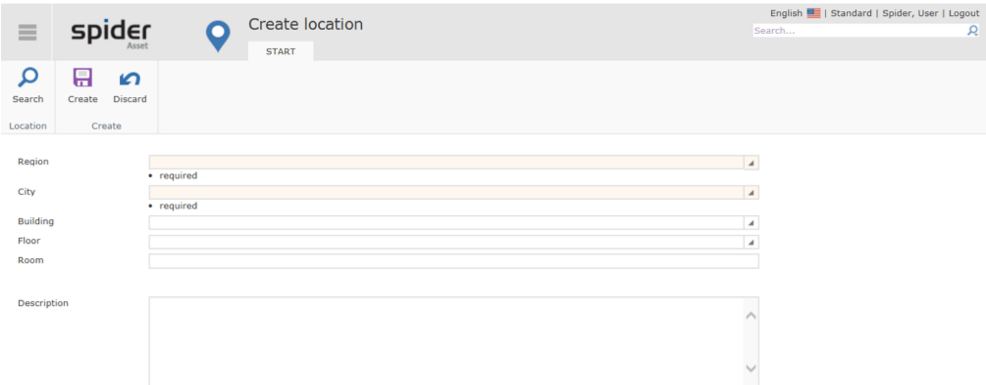
Create locations

- To create a location, go to the menu area *Master data* or to the **Backstage** (on page 35) on the home page of Spider Asset and click on the **Location** menu item.



- Click on the **New** ribbon button in the location search or in the Edit form of a location.

The form for entering the location tree will open. Use the combo box fields to either select each level of your locations one after another or enter them as free text (if you have the required rights).



- The data fields which must be filled in are marked as mandatory fields. Then click on **Create** to save your input or use the **Discard** button to cancel your input. The page will then be reloaded.

Edit locations

- To change the location, go to the menu area *Master data* or to the **Backstage** (on page 35) on the home page of Spider Asset and click on the **Location** menu item.
- Then click on the location to be edited in the *Path* column of the *Location search* form.

- Make the required change to the location tree and click on the **Save** ribbon button to save the change in the system or use the **Discard** button to cancel the change. The page will then be re-loaded.
- The location is deleted by clicking on the **Delete** button.

Note	If a location is assigned, it cannot be deleted.

CHAPTER 3

License management with Spider Licence

The following chapters describe in detail how to work with the main objects in Spider Enterprise.

During the login process the user is identified and the home page will be opened corresponding to his role configuration. From the home page you can use all functions which are assigned to the pre-configured roles.

3.1 Glossary of terms

3.1.1 License metric

The license metric is a measuring unit for licenses which determines the basis on which the rights for the usage of software can be measured. For example, you can distinguish among client, processor, user, or tiers. Spider Licence supports the mapping of different license metrics.

3.1.2 Product version

The product version manages licenses of a software version in a license metrics. It gives information about existing, valid, used, and free usage rights of the allocated licenses.

3.1.3 Product

The product includes several product versions of a license metric and allows for evaluations across several versions. It manages the license inventory and the license requirement of a software across several product versions. Only product versions belonging to the same license metric can be assigned to one product. Cross-version downgrade evaluations are created on the product level.

3.1.4 License

When purchasing a software license, the copyright owner will grant the customer the right to use the software under the terms specified in the license contract.

In Spider Licence, you must always assign licenses to a license metric and thus a product version. Licenses cannot exist alone. Since there are different types of licenses, they are mapped via license types. You can distinguish various forms of a license. A license can possess update or downgrade rights. An update will always require a license as basis.

3.1.5 License type

For each license type the conditions for validity of the usage rights from the license can be distinguished. An OEM license requires the connection to an asset, a Named User license requires the connection to an employee, etc. Each license type is specified via parameters. Thus, we can distinguish single licenses from volume and company licenses.

3.1.6 Maintenance

The **Maintenance** is a main object which you can assign products and licenses to.

Maintenance stands for **Software Maintenance**, **Software Care** and **Software Assurance**. In case of a valid maintenance for a license, you are entitled to the latest product version. The maintenance is carried out per license.

3.2 License management

In Spider Licence, the **licenses** refer to the existing license certificates and therefore must be assigned to a corresponding **product version**. Licenses correspond to usage rights. They can be limited in time and are distinguished in full and update licenses. The **product version** shows in a centralized and well-arranged manner, which usage rights are available according to the existing licenses.

When purchasing a software license, the copyright owner will grant the customer the right to use the software under the terms specified in the license contract. The following forms of licences are available:

- Single license
- Volume license
- Company license
- Named-User license
- OEM license
- Product change license
- Update license
- A license can possess update, downgrade, or pooling rights.
- Subscriptions are supported via articles (SKU) with Subscription property

Spider Licence supports the above-mentioned license types in the default configuration.

Licenses are compliance relevant if they are in an active Status and are not expired.

Attention	Some license types and maintenances must have start and end date configured to be considered valid.

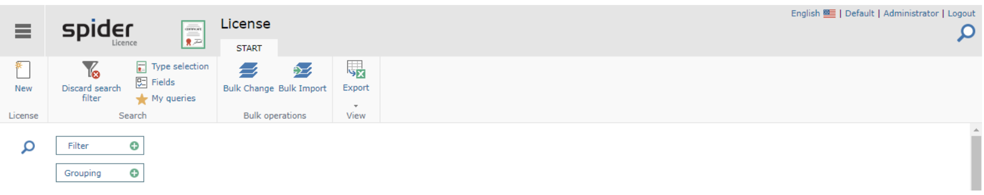
3.2.1 Create license from object search

Starting from the main menu, a new license is created via the license inventory or the product version.

When creating a license, you can also decide whether the license should be created manually or with the help of a wizard that creates the license based on the article catalog.

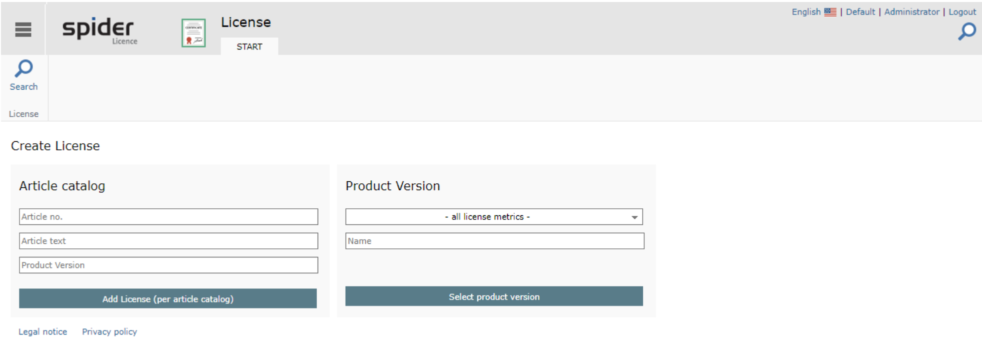
➢ Click on the Licenses button in the License inventory menu area on the start page.

The license search form opens.



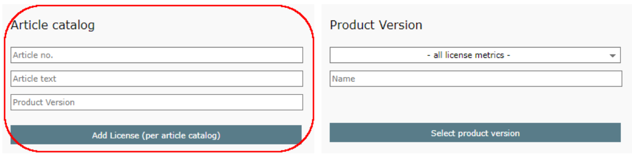
➢ Click on the New button in the License ribbon group.

Two choices are offered:



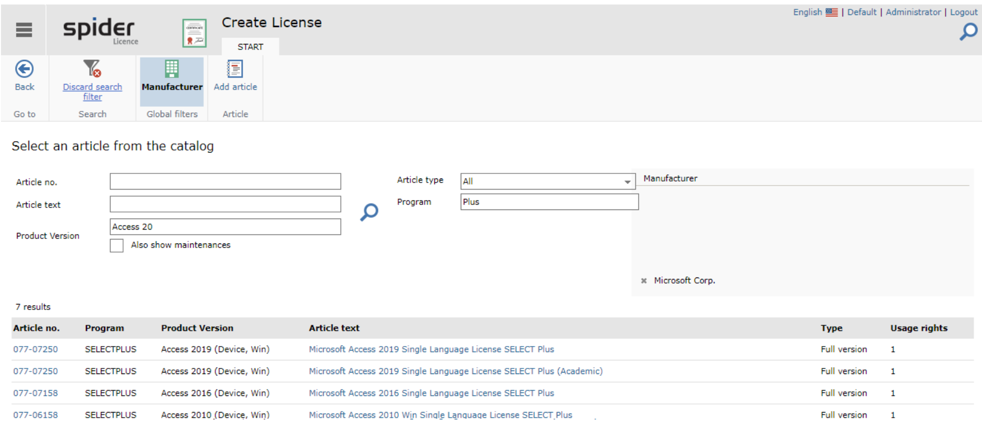
Create license with SKU number from article catalog

First, the left tile **Article catalog** is considered. The second tile **Product version** follows with section "Create a license for a product version" from page 160.



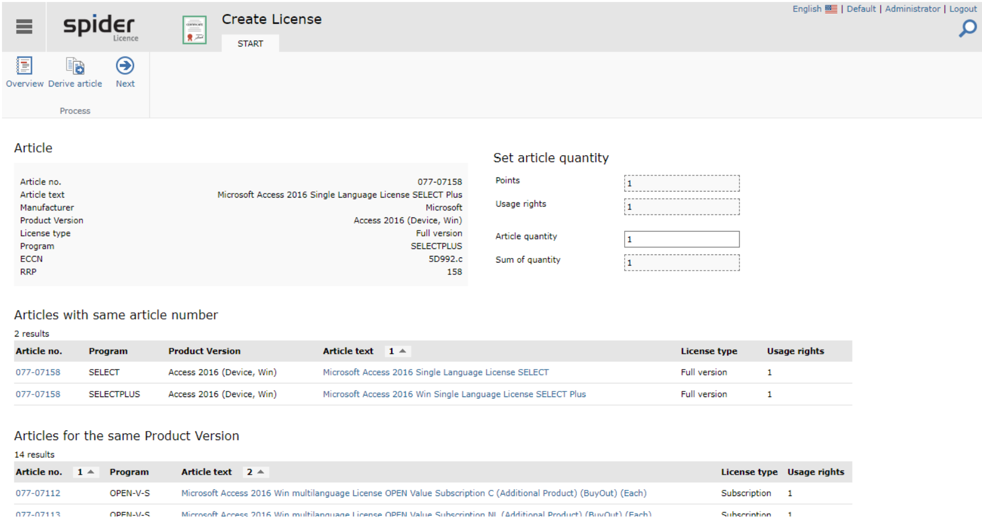
- Enter a specific article number, part of the article text or, for example, a product version. Chosen here "Access 20".
- Click **Add License (per article catalog)**.

The entries are taken over for the following page. Since this requires the specification of a manufac-turer, you will be asked for it when you enter the page. If you are not asked, a global manufacturer filter is already selected. This is to be checked if the result list remains empty.



- Click on the **Article no.** of the desired article, for example 077-07158.

Next, you can check whether another article should be used. It is mandatory to specify how often the article should be used for the license. The article itself specifies a number of usage rights. The total resulting usage rights in the new license is therefore the product of usage rights and article number.



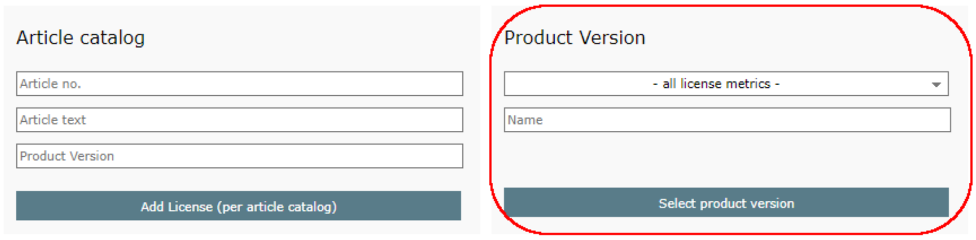
➢ After specifying the number of articles, click **Next** in the ribbon menu.

If the article also includes a maintenance, both Objects will be created in this process. As the maintenance is bond to this license then, many fields will be read only there.

Continue with "Define a Legal Entity for a License" on page 161.

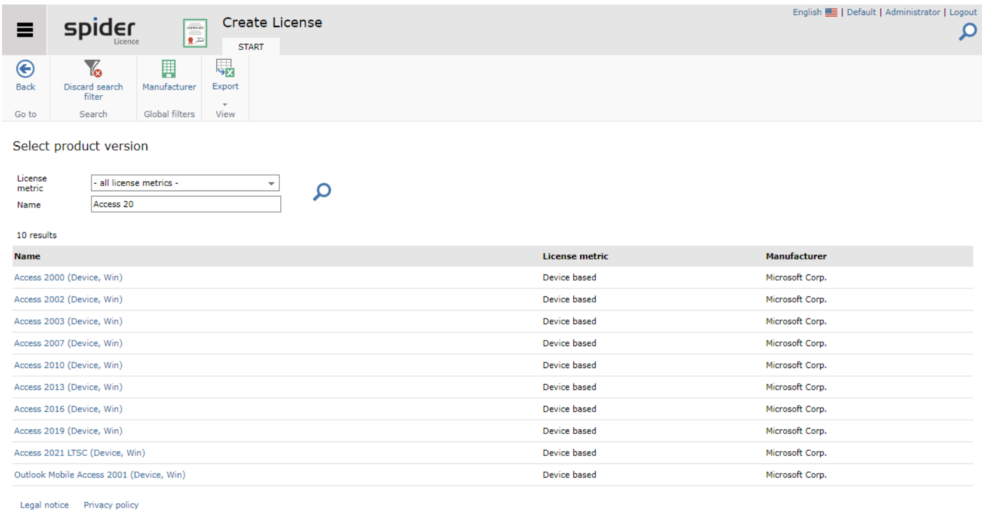
Create a license for a product version

Here the license creation is described via the right tile **Product Version**. The left tile **Article catalog** is described in the section "Create license with SKU number from article catalog" from page 159.



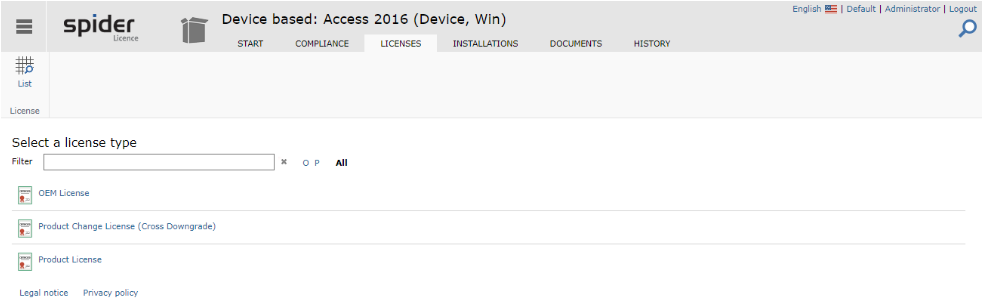
➢ Select the corresponding product version, in the example "Access 20".

The search form of the product versions opens.



➢ Click on the name of the product version for which a new license is to be created. In the example this is "Access 2016 (Device, Win)",

You will be prompted to choose a license type:

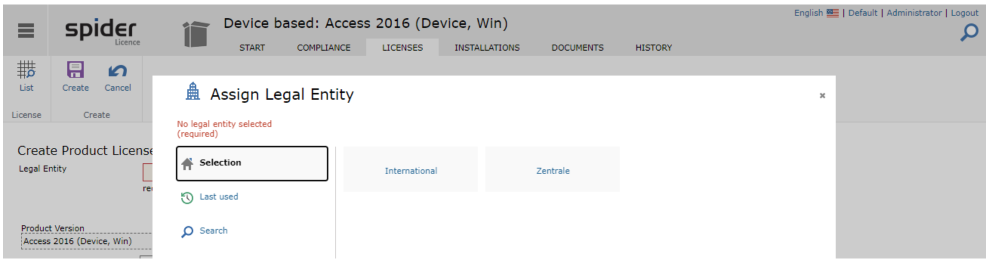


➢ Klick on **Product License.**

Continue with "Define a Legal Entity for a License" on page 161.

Define a Legal Entity for a License

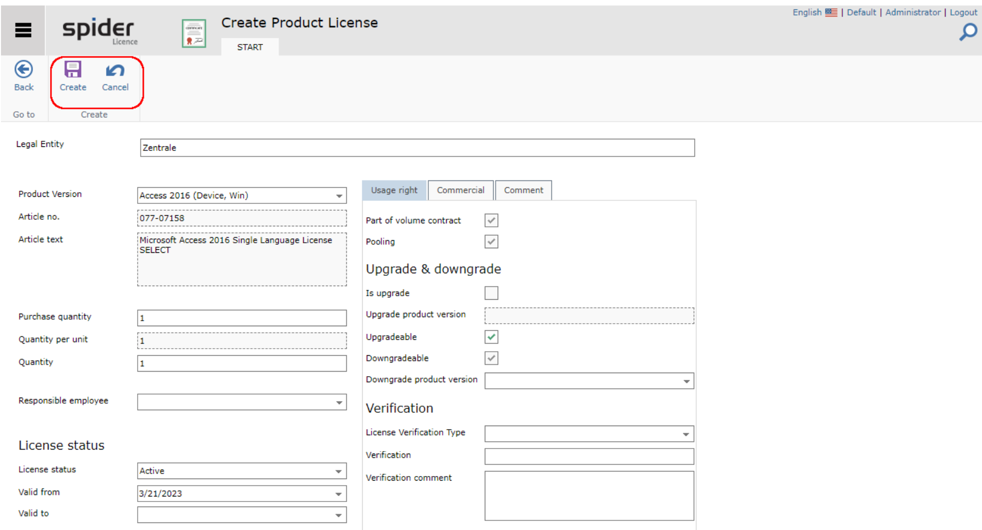
You will be redirected to the Create page for a product license. Here, a legal entity must be specified first.



The Apply button is visible when a business unit has been selected for which the user is authorized. For details on business units to licenses, see the chapter **"Assign legal entity"** on page 181.

Create a License

After closing the dialog, the remaining parameters can be entered, and the license can be saved via the Create ribbon button.



Fields, which are taken over from an article, are protected against changes. In case of a license creation without article linkage, changes can be made here as well.

It is important that the **Purchase quantity** and the **Quantity per unit** make a product, which can be found under **Quantity**. Manual changes to one of the fields must therefore also affect the other.

Licenses with linkage to an article with subscription property will only become compliance effective when a **valid from** and a **valid to** date is provided.

➢ Click the **Create** button to save your entries. If you have made changes that you do not want to save, or if you want to completely reload the object, click **Cancel**.

3.2.2 Create license at the product version.

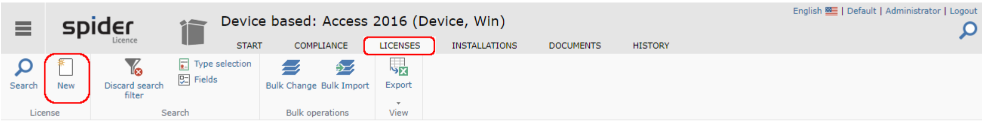
This approach differs in a few details from the license system via the license object search. The differences are mainly because the context of the manufacturer or the product version can be assumed.

➢ Click on the **Product Version** button in the License Management menu area on the start page.

➢ Select the desired product version, for example *Access 2016 (Device, Win)*.

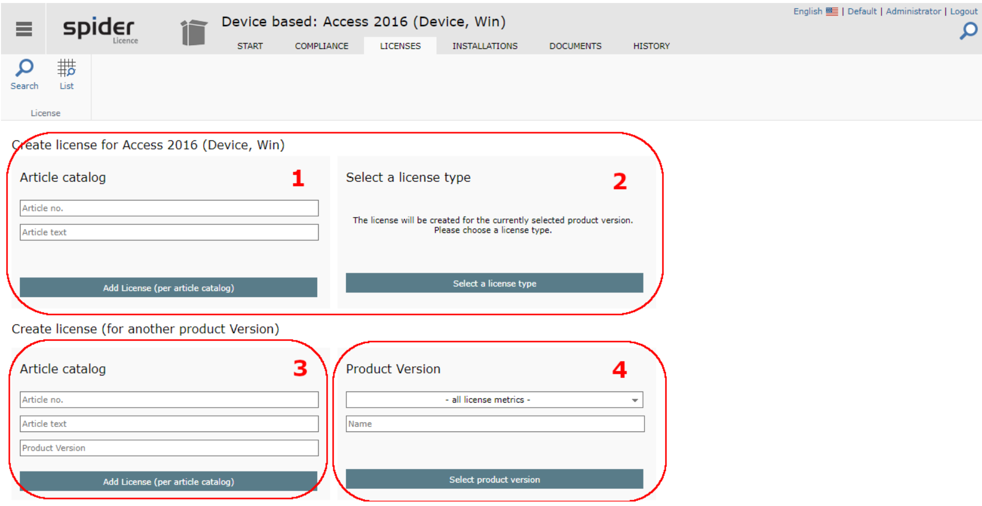
The Edit page for the Product Version appears.

➢ To create a new license, switch to the **Licenses** tab.



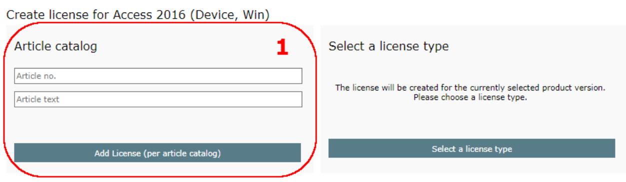
➢ Click the **New** ribbon button.

Note	If you do not see this button, check the user's authorization.



License creation in the current context is done using tiles one and two in the top row and is like the creation from the license object search. If licenses are to be created without the current context of the product version, the tiles in the bottom line will help. This procedure is then identical to the creation from the license object and described there. For page frame three, see section "Create license with SKU number from article catalog" on page 159 and "Create a license for a product version" on page 160 for page frame four.

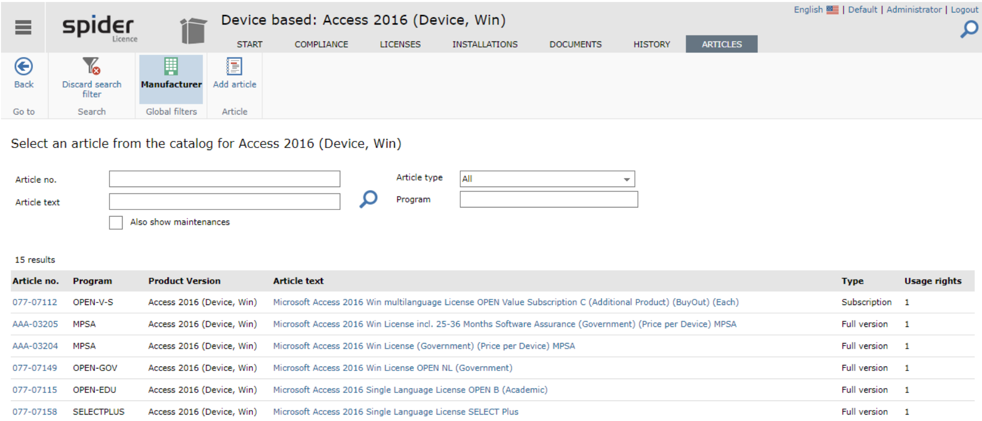
Create License with SKU number (1)



➢ Click on the ribbon button **Add License (per article catalog)**.

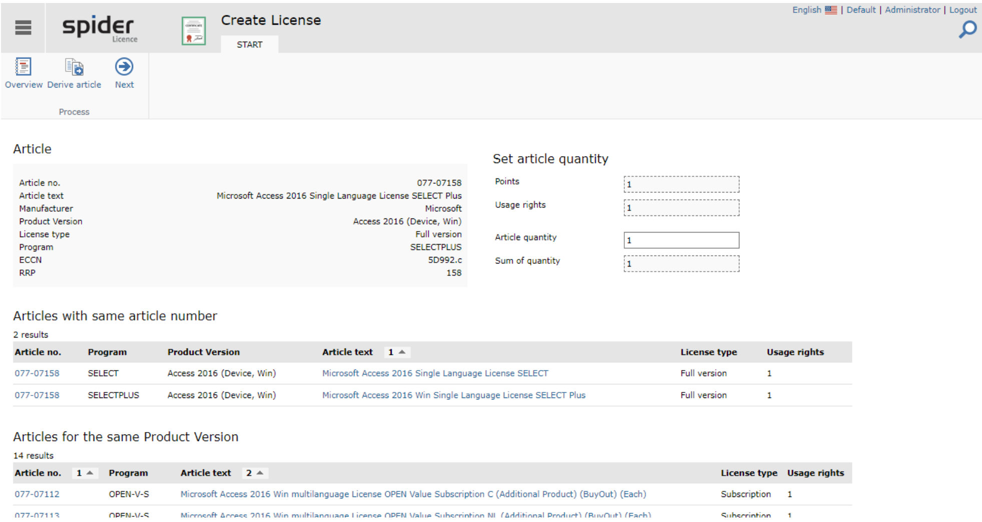
All available articles of the respective product version are offered for selection. The selection can be further restricted using the article filter.

Note	A manufacturer selection is not necessary at this point, because it is derived from the context of the product version.



➢ Click on the article no. of the desired article, for example 077-07158.

Next, you can check whether another article should be used. It is mandatory to specify how often the article should be used for the license. The article itself has a number of usage rights. The total of usage rights for the new license is therefore the product of **Usage rights** and **Article quantity**.

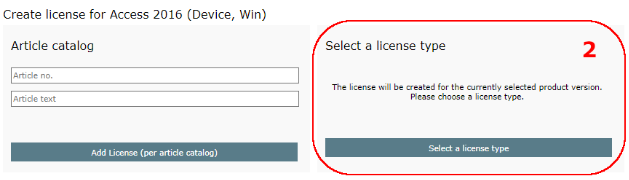


➢ After specifying the number of articles, click **Next** in the ribbon menu.

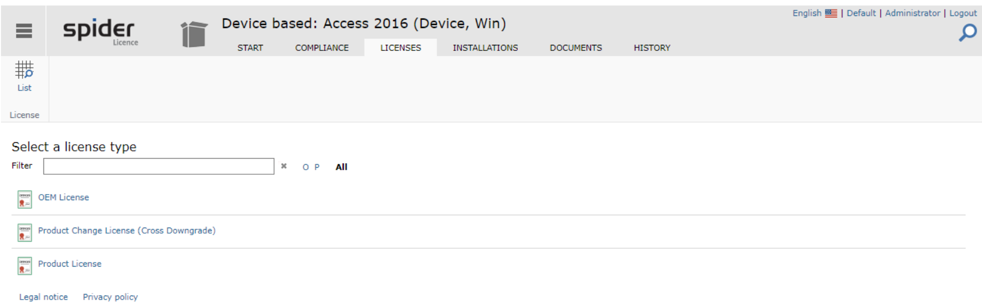
Continue with "Define a Legal Entity for a License" on page 161.

Create License for a product version (2)

To enter new licenses, select the appropriate license type.



Note	The selection of License types offered depends on the license metric you are using.



➢ After specifying the number of articles, click **Next** in the ribbon menu.

Continue with "Define a Legal Entity for a License" on page 161.

3.2.3 SKU based License import

In the case of SKU-based import, the licenses are automatically created in Spider Licence based on the article number (SKU) and, if possible, assigned to the associated product versions.

The following rules apply:

- If a product version can be uniquely determined via the SKU, the license is created at this product version. Otherwise, the license is only imported if an alternative product version has been specified.
  It is recommended to specify the product version *Cleansing*.
- If an article can be uniquely determined via the SKU, it will be linked to the license. The values from the article catalog are transferred to the license. If no clear assignment can be made, the license is created with the data from the import file. A later article assignment is possible via the article change wizard.
- If a preferred article exists for an SKU, this will be used as the default (for details see Chapter “Preferred articles with the same SKU” on page 213).

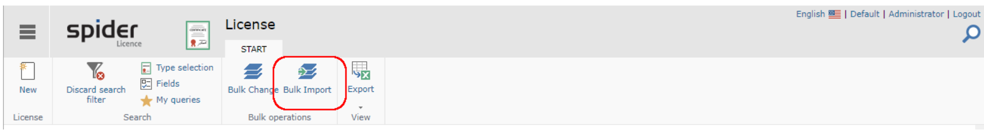
The following fields are important for the license creation:

- Article No. (SKU)
- Article text
- Valid from
- Quantity
- Status
- Product version (this is only required if the product version cannot be clearly resolved via the SKU).

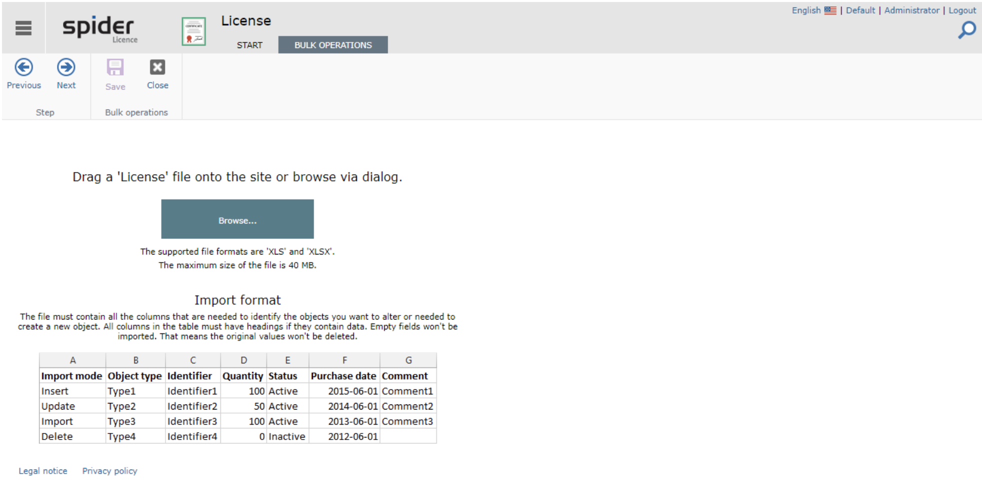
Article no.	Article text	Valid from	Quantity	Status	Product Version
731-00761	Microsoft Office 10.0 Professional Mac engl. CD	01.11.2021	2	Aktiv	Cleansing
79P-03547	Microsoft Office 2010 Professional Plus Win Single Language License OPEN C	28.10.2022	2	Aktiv	Cleansing
H30-02673	Microsoft Project 2010 Professional Win de. DVD	01.09.2022	4	Aktiv	Cleansing
087-04397	Microsoft Visio 2010 Professional Win de. DVD	02.12.2021	5	Aktiv	Cleansing
077-06158	Microsoft Access 2010 Win Single Language License SELECT	06.12.2022	3	Aktiv	Cleansing
P71-07305	Microsoft Windows Server Datacenter Win 2 CPU Step Up from Windows Server Standard	07.12.2021	2	Aktiv	Cleansing

➢ Click on the **License** tile in the License inventory menu area on the start page.

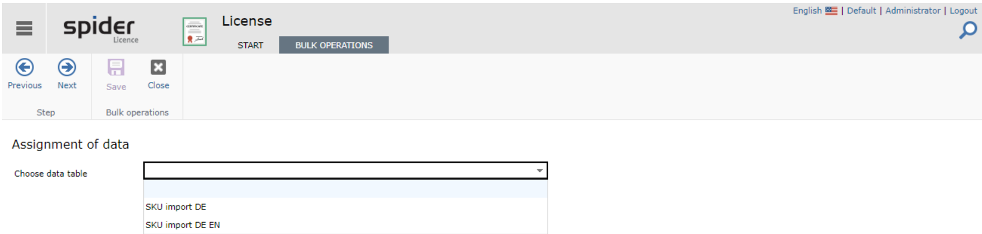
The License search form opens.



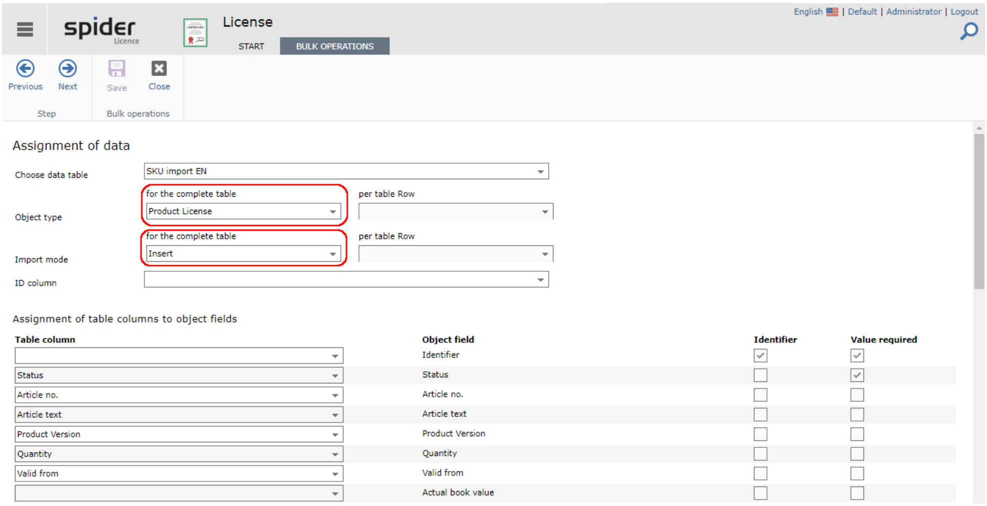
➢ In the License form, in the **Bulk operations** ribbon group, click the **Bulk Import** button.



You will be prompted to select the path to the import file. For this example, the above table is used. If your workbook has more than one table sheet, the system will ask which table is the relevant one:



➢ Optional: select the table you want.



➢ Select the object type **Product License** and the import mode **Insert.**

Import modes	Description
Import	Depending on whether an object was found or not, the IMPORT im-port mode performs an update or an INSERT operation.
Update	With the import mode UPDATE existing objects are updated. The specification of an identifier or ID is expected then.
Insert	With the import mode INSERT new objects are created. Existing ob-jects are not updated. No ID or identifier must be specified here.
Delete	DELETE deletes existing objects if an ID or identifier is available with which the data set can be identified.

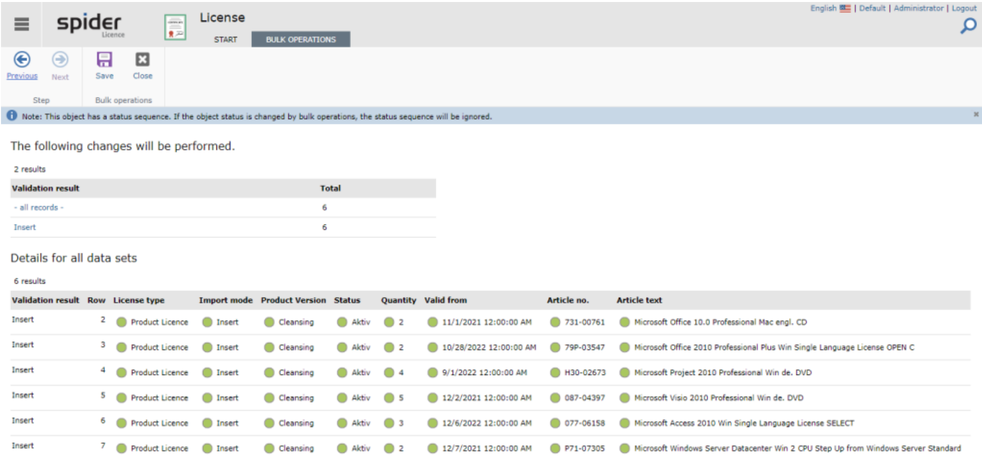
The import mode can be set either for the whole table or per row. If the import mode is set per row, there must be an **ImportMode** column with the supported values (Import, Insert, Up-date, Delete, Ignore). The same can be done with the **License type**.

Spider assigns the correct object fields to the column headers from the table. Check that the fields could be assigned correctly. For the scenario described here, the fields **Article No.** and **Quantity** are mandatory.

- ➢ Select the assignment of the table columns to the object fields if necessary.
- ➢ Click **Next** to start the validation.

A dialog informs about the progress of the validation and closes itself with completion.

The result of the validation is shown in the following form.

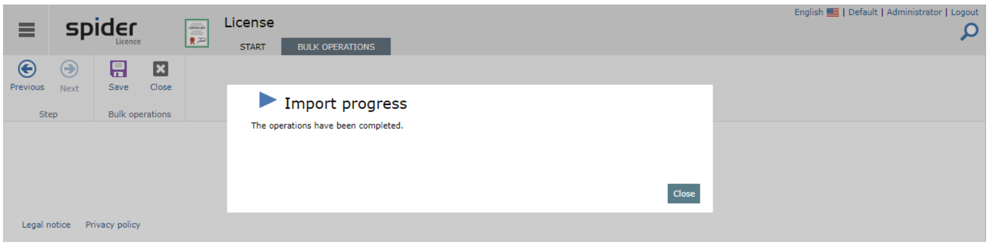


Important	Data records with incorrect or invalid information will not be processed further and would have to be corrected in the source file before processing.

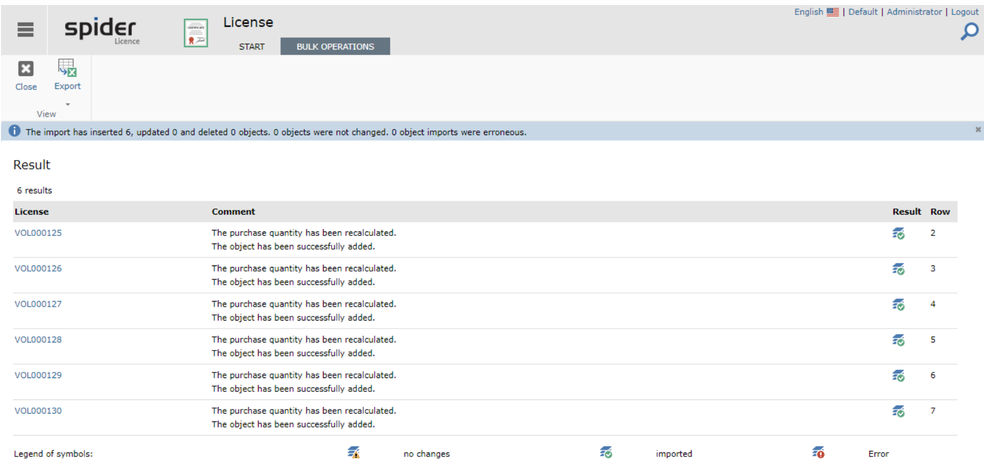
Attention	The product version "*Cleansing* " is only available if it has been created manually beforehand.

- ➢ Click on **Save** to execute the mass import.

If you have edited the import data in the workbook, the workbook must be saved and then up-loaded again. To do this, navigate to the file upload using the Back button or cancel the process by clicking **Close** and start again.



- ➢ Click the **Close** button to display the result.



- ➢ Clicking the **Close** ribbon button returns you to the search form.

The identifier of the created licenses link to the respective edit page. Check the resulting number of licenses. This results from the number specified in the import file and the usage rights granted by the selected Article.

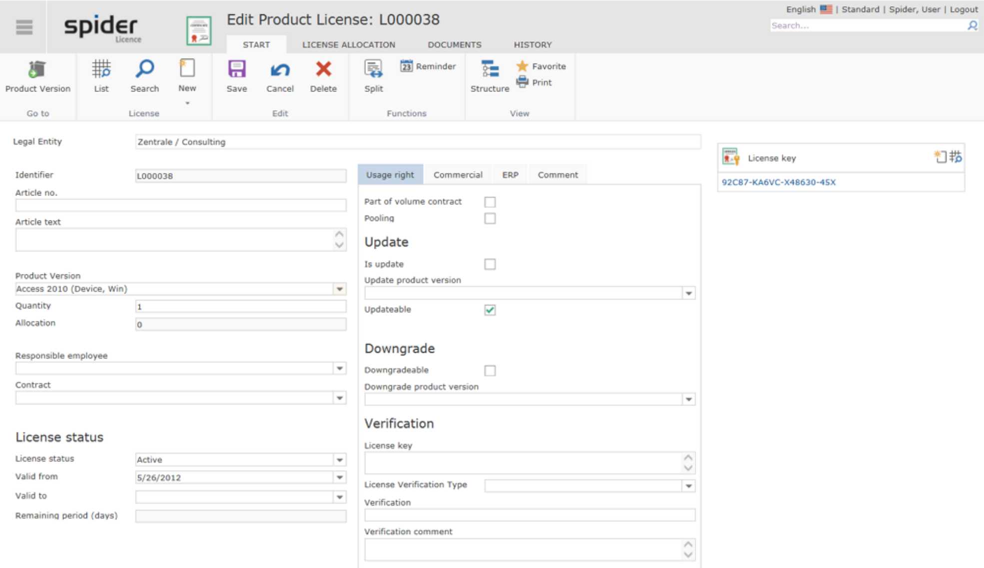
Note In the license search, check whether licenses have been created for the *Cleansing* product version.

Licenses that were created for the *Cleansing* product version could not be assigned uniquely and must be reassigned to the desired product versions via a manual cleanup. The transfer can also be made using the article change wizard (see "Article change wizard" on page 188).

3.2.4 Edit licenses

After creating a license, its fields can be supplemented or modified.

ERP and **Commercial data** as well as general **Comments** and **Usage rights** are maintained on individual ribbons.



The following table explains the meaning of the input fields in the area **Usage right**, which affect the license positions and the compliance evaluation.

Input field	Meaning
Quantity	Number of usage rights for the license, depending on the license metric. Regarding device-based metrics, the number of usage rights refers to the installations. In contrast, the number of usage rights for CPU-based metrics refers to the number of CPUs which are covered by the license.
Part of a volume contract	This check box is activated in case of a volume license, e.g., Adobe Cumulative License Program (CLP).
Pooling	The Pooling check box determines whether a license can be used for a pooling distribution. The pooling distribution is intended to compensate for under-coverages of a sub-level legal entity by distributing excess pooling licenses from the superior legal entity.
Is Update	By ticking the box **Is Update** you can specify that this license is meant for an update. This hook is not set by default, which means that the license usually is a full version.

Input field	Meaning
Update product version	An update requires active, updatable licenses of a previous version. For the update control, which ensures that there are sufficient licenses for the updates, not the license is selected but the product version which contains the updatable licenses of the previous versions. Please note that an assignment to an update product version is only possible for licenses, which have their **license status** (on page 168) set to **Active**. The usability of updates is independent of the license metrics. The update control does not have to be activated for all license metrics.
Update right	This check box determines whether a license may be used for an update. **Note:** The evaluation of update licenses will not work if there is not specified any update product version.
Downgrade right	The downgrade right allows the usage of older versions. This means, the downgrade right allows the usage of previous versions of the licensed products. The downgrade distribution takes place within the legal entities. By combining downgrade right and pooling, you can also apply downgrades to connected legal entities. In Spider Licence the downgrade right is implemented by the following criterion. Check the check box Downgrade right to mark that this license includes a downgrade right. The tick is not set by default, i.e., the license can only be applied to the assigned product version. The downgrade right is only available for certain licenses.
Downgrade product version	By setting a downgrade product version, you can select the product version down to which a downgrade is possible. If no downgrade product version is selected, the downgrade can be carried out down to the oldest product version of the product.

- After editing the data, click on the **Save** ribbon button to save your entered data. The license will be reloaded and displayed.

License status

By default, the following license states are available:

In planning	A license is not yet listed in the inventory, but the purchase is scheduled and thus may be marked down in the system.
Active	This is an active license.
Inactive	This is an inactive license.
Archived	This license is no longer used and is no longer available for usage.

Depending on the existent system configuration, the available states can be defined otherwise.

3.2.5 Assign legal entity

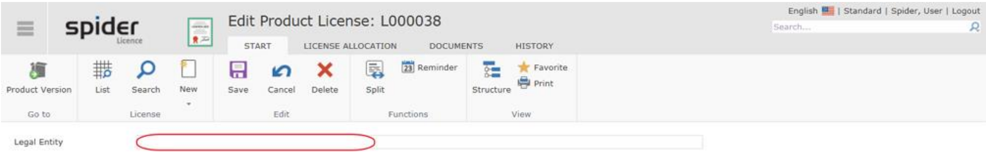
Licenses, which have been assigned to a legal entity, are only available for this legal entity in case of license positions and compliance evaluations.

Note	In case of pooling, the licenses are also available for affiliated legal entities.

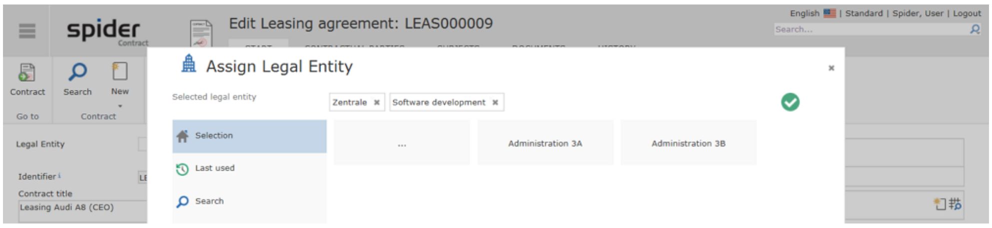
Licenses which have been assigned to a legal entity can only be viewed by users who possess a corresponding permission for this legal entity.

The legal entity can be selected directly when creating a license. The assignment of the legal entity can be changed anytime in the Edit form of the license.

➢ To assign a license to a legal entity or change the assignment, click into the **Legal Entity** field in the Edit form of the license.



➢ Then you can select a legal entity or assign the last used legal entities.



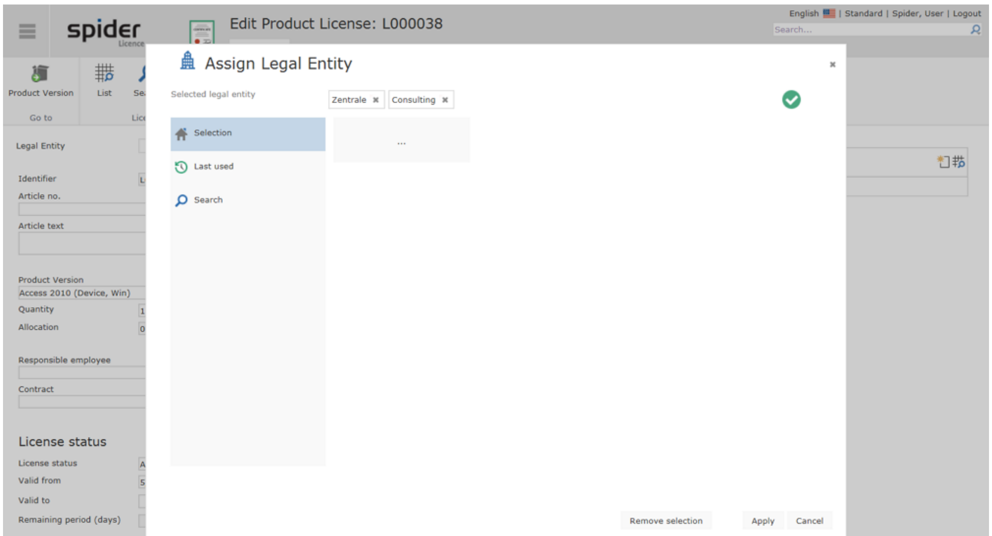
The path to the selected legal entity is displayed in the line *Selected legal entity*.

➢ If there are subordinated legal entities, they can be selected by clicking on the corresponding **tile**.

➢ By clicking on the **tile ...**, the superior level in the legal entity structure will open.

Note	The green tick confirms that a correct assignment is possible. If the user has no rights for a legal entity, he is not allowed to make an assignment (there is no green tick).

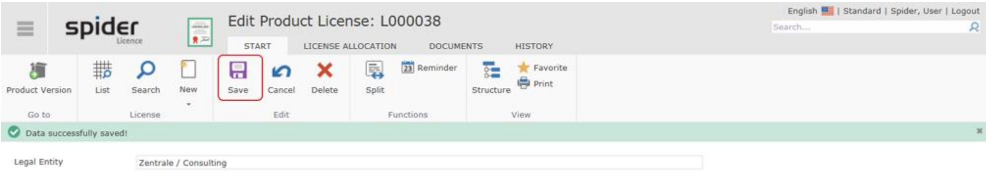
➢ Navigate through the structure and select the desired legal entity. For example, select the legal entity *Consulting*.



➢ Click on **Apply** to accept your selection.

In the Edit form of the license, the complete path of the affected legal entity is shown.

Attention	The assignment is only successful after the change has also been saved in the Edit form of the license.



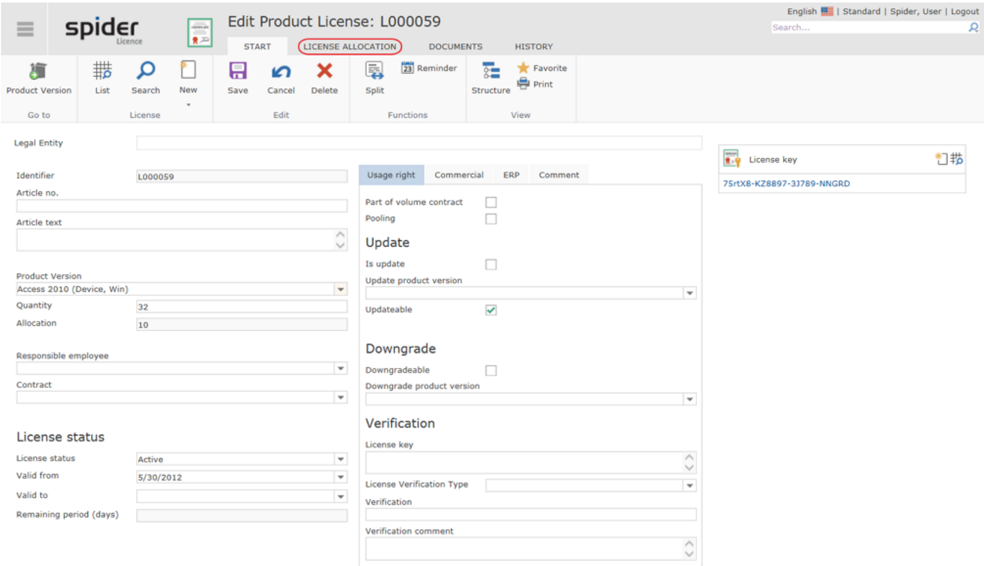
3.2.6 Navigation

The ribbon offers you the following navigation options:

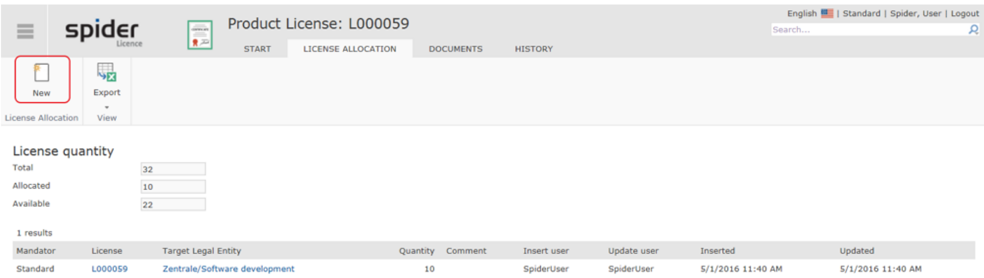
Ribbon group	Ribbon button	Function
Go to	Product version	Navigates directly to the related product version.
License	List	Opens by default the list of licenses for the corresponding product version.
	Search	Navigates to the search across all licenses.
View	Structure	You can open the product structure view directly from the license. Click on Structure in the View ribbon group. The structure view shows all objects of the product (product versions, licenses, license allocations) and allows for a quick navigation.

3.2.7 The License allocation tab

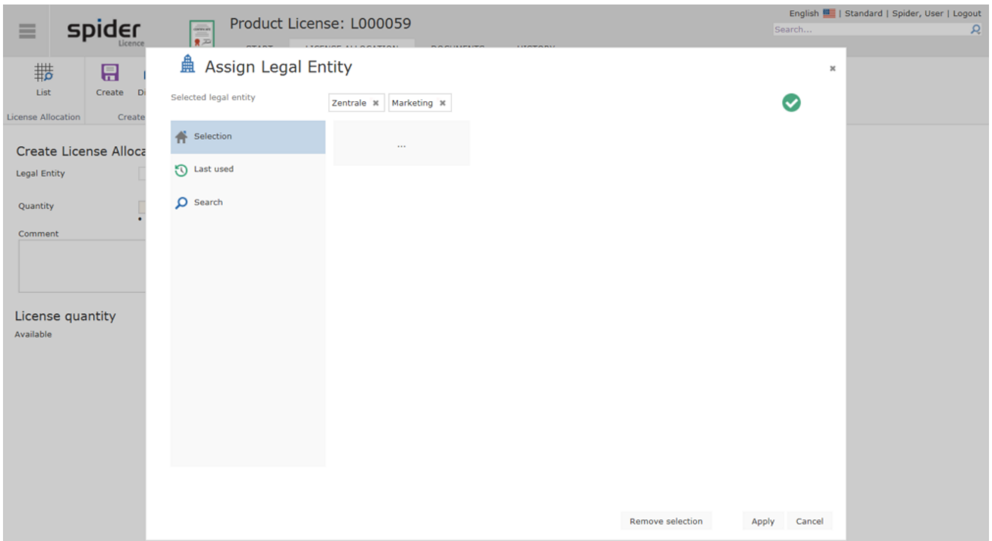
By means of the **License allocation** you can allocate volume licenses to different legal entities. The **License allocation** tab in the shown volume license gives information about the allocation to the legal entities.



➢ To allocate licenses to a legal entity, click on the **License allocation** ribbon in the Edit form of a volume license.

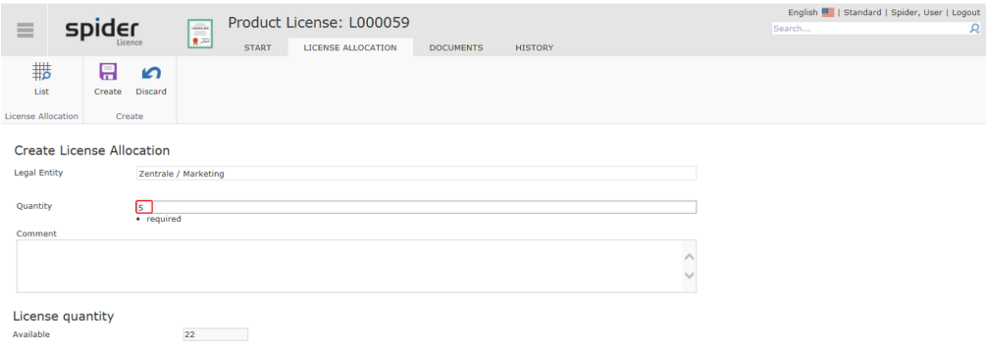


➢ If licenses are available for allocation, click on **New**.



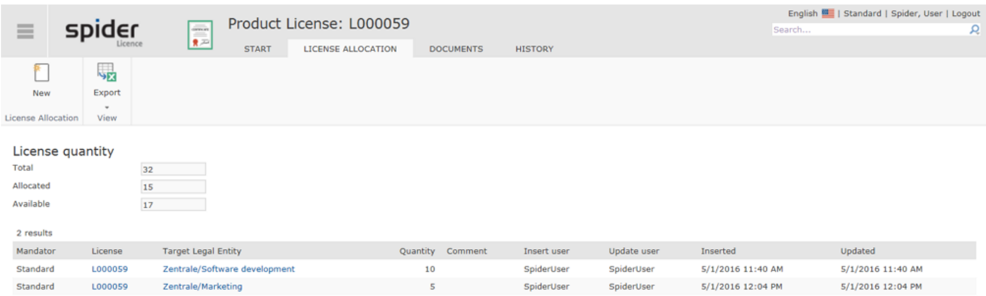
➢ Select the legal entity which you want to allocate new licenses to and click on **Apply**.

Attention	The Legal Entity of the license object can be selected here but cannot be saved. If in addition a Legal Entity is selected for which an allocation already exists, the process terminates with an error message. The existing allocation must be changed then.



➢ Finally, enter the corresponding **Quantity** of licenses which shall be allocated and click on **Create**.

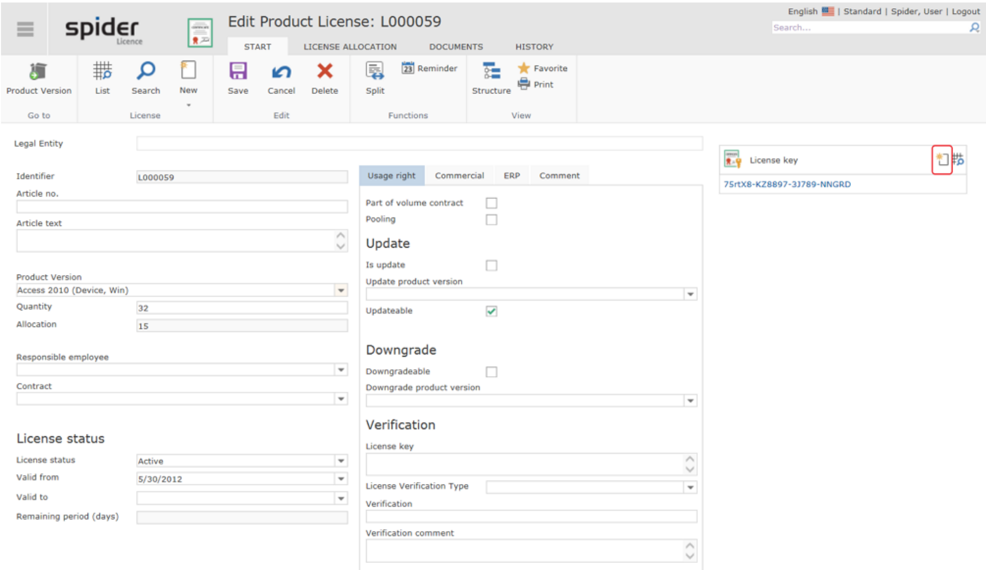
The summary is now showing the current allocation of usage rights to the different legal entities.



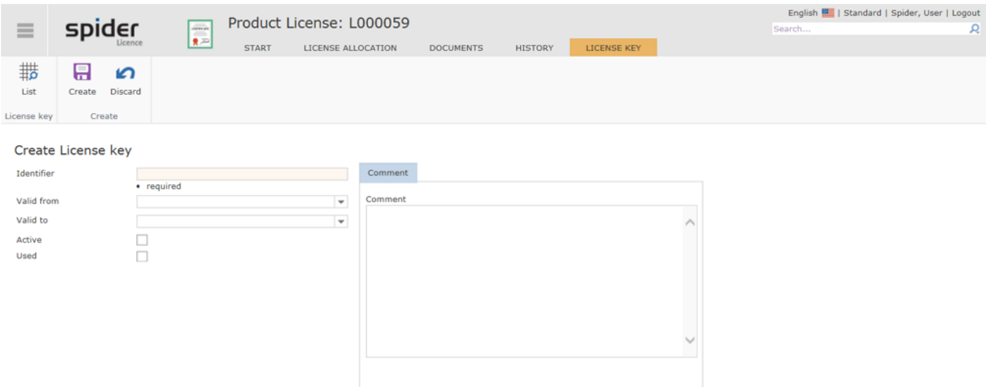
Note	Licenses which have already been assigned to a legal entity may be disconnected from the legal entity anytime by clicking on the delete icon. Then you can re-allocate them.

3.2.8 License key

For the management of license keys, the object **License key** was added to Spider Licence. You can manage several license keys per license. In addition, it can be logged by means of selection fields whether the license key belongs to an asset or to an employee.

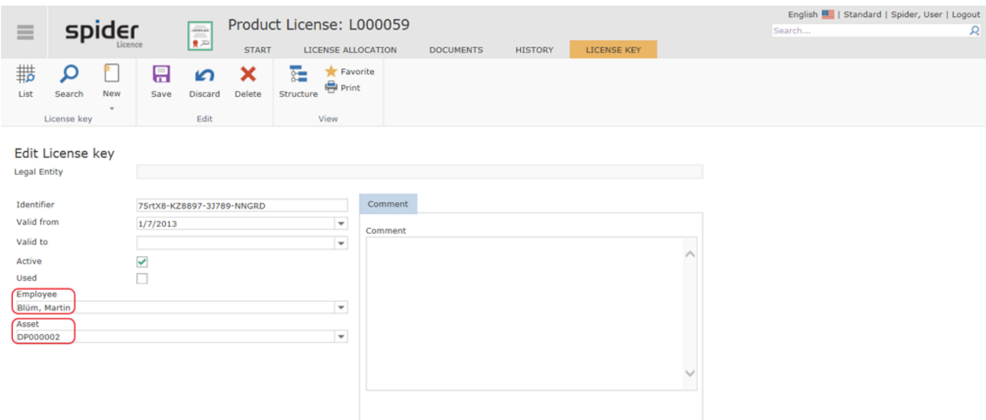


- To create a new license key, click on the **New** icon in the object lister **License key** in the Edit form of the license. In the ribbon, the License key context ribbon and the creation form for the license key are opened.

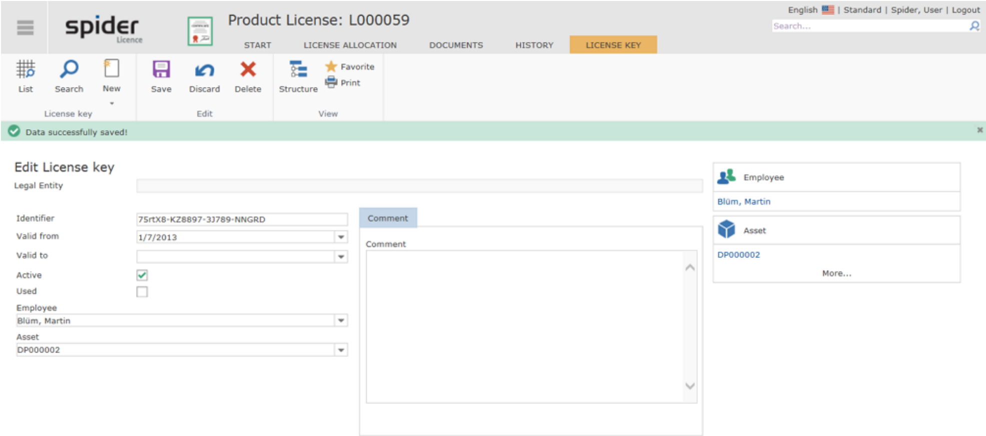


- To create a key, at first enter the license key into the **Identifier** field.
- Click on the **Save** button to save your input.

After the key is created, the asset or the employee can be assigned to document the usage of the license key.



➢ Then click on the **Save** button.



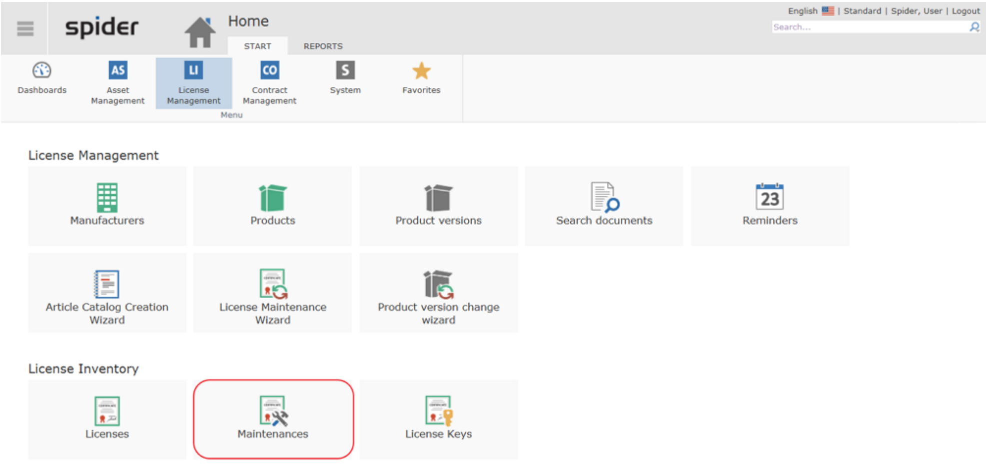
The **License key** ribbon offers functions for creating, editing, and deleting the license keys of a li-cense.

3.3 Maintenances

The **Maintenance** is a main object which you can assign products and licenses to. Maintenance stands for e.g., Software Maintenance, Software Care and Software Assurance. In case of a valid maintenance for a license, you are entitled to the latest product version.

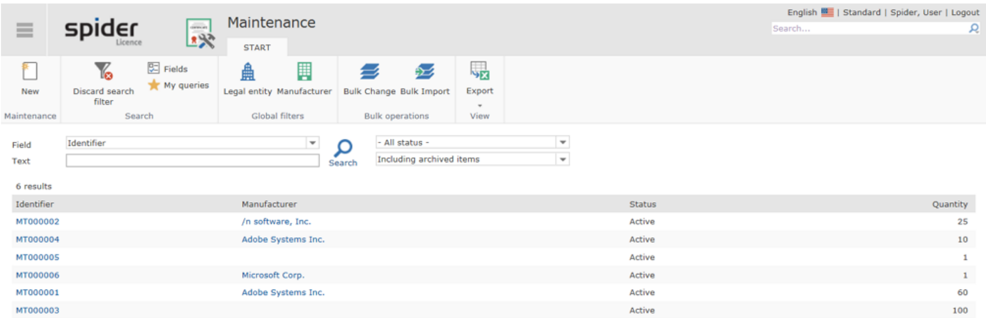
➢ The overview and management of maintenances is carried out via the **home page** of Spider Licence or via the **Backstage** (on page 35).

➢ Click on **Maintenance** in the Licence inventory menu section.



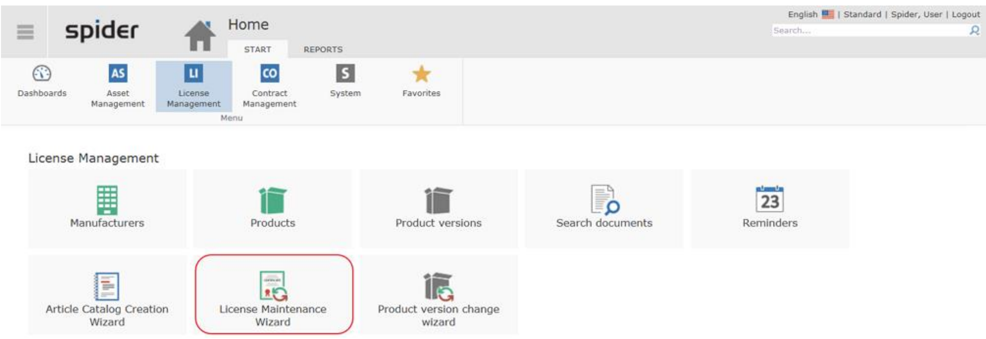
The following illustration shows an overview of all maintenances. In case of many maintenances, we recommend using filters to limit the search results. For more information, see chapter **Search forms** (on page 38).

➢ To edit a maintenance, click on the corresponding **Identifier**.



For updating licenses with valid maintenance to a current product version, you will be supported by a **Licence maintenance wizard**.

You will find the **Licence maintenance wizard** also on the home page in the Licence management section.



For more details, **see** (on page 184)

3.3.1 Create maintenance

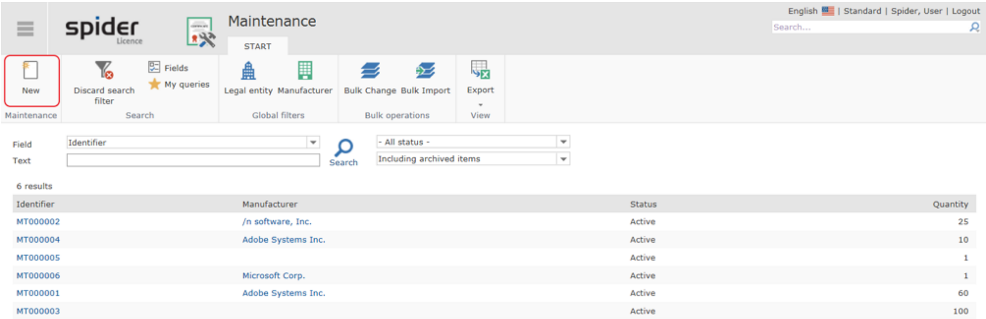
Starting from the main menu, you can create a new maintenance using either:
a) the license inventory or
b) the product.

In the creation process you can decide whether the maintenance shall be created manually or with the help of a wizard which creates the maintenance based on the article catalog.

a) Creating a maintenance using the license inventory.

➢ Click on the **Maintenance** button in the *License inventory* menu area on the home page.

The Search form of the maintenance will open.

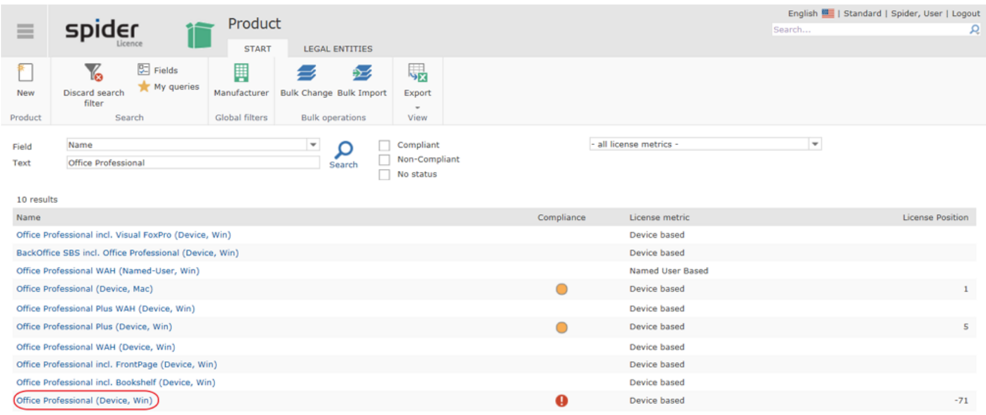


➢ To create a new maintenance, click on the **New** button in the *Maintenance* ribbon group.

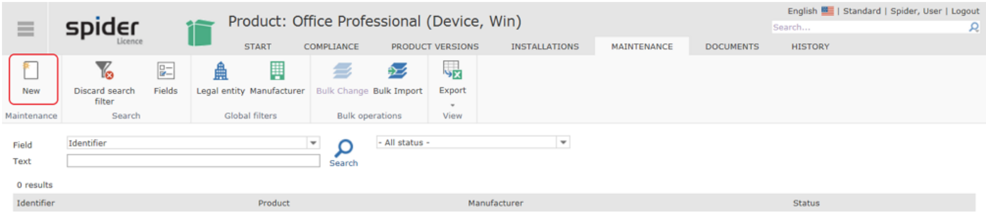
➢ Please decide whether the maintenance shall be created manually or based on the article catalog and select the related **Product** or the related **Article**.

b) Creating a maintenance using the product.

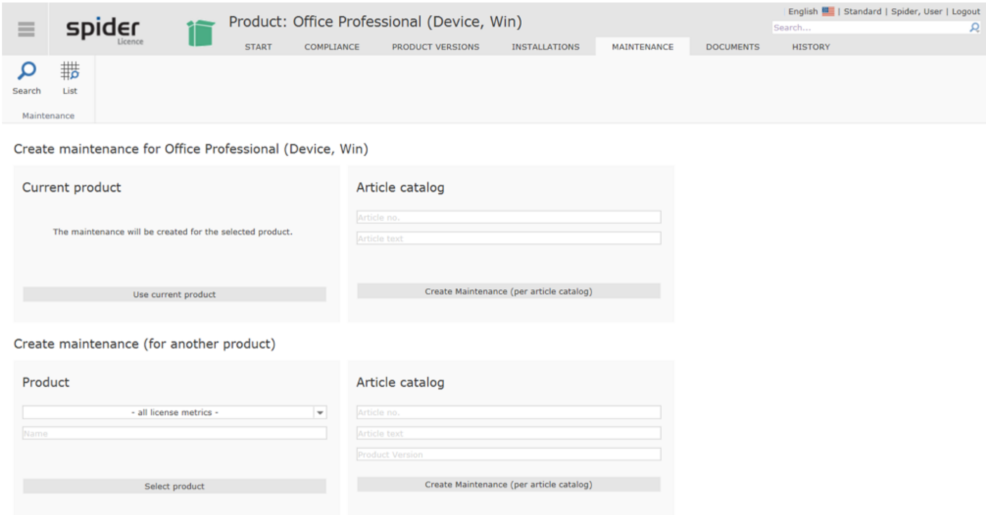
➢ Click on the **Product** button in the *License management* menu area on the home page.



- ➢ Select the product for which to create a maintenance.



- ➢ Go now to the Maintenance ribbon and click on the **New** ribbon button.



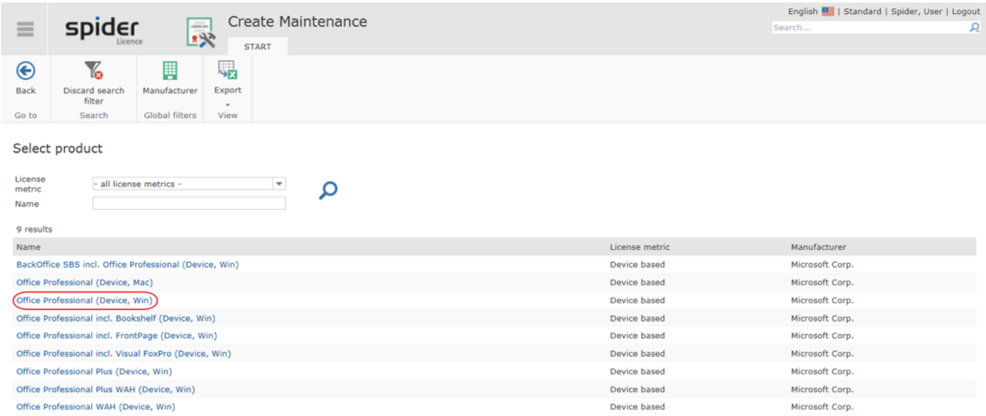
- ➢ Please decide whether the maintenance shall be created manually or based on the article catalog and select the related **Product** or the related **Article**.
- ➢ Please decide also whether the maintenance shall be created for the selected product or for another product.

Note	While for the manual creation, the following steps must be executed, the maintenance will be **created** (see "**Create maintenance via the article catalog**" on page 179) automatically when creating the maintenance based on the article catalog.

Create maintenance manually

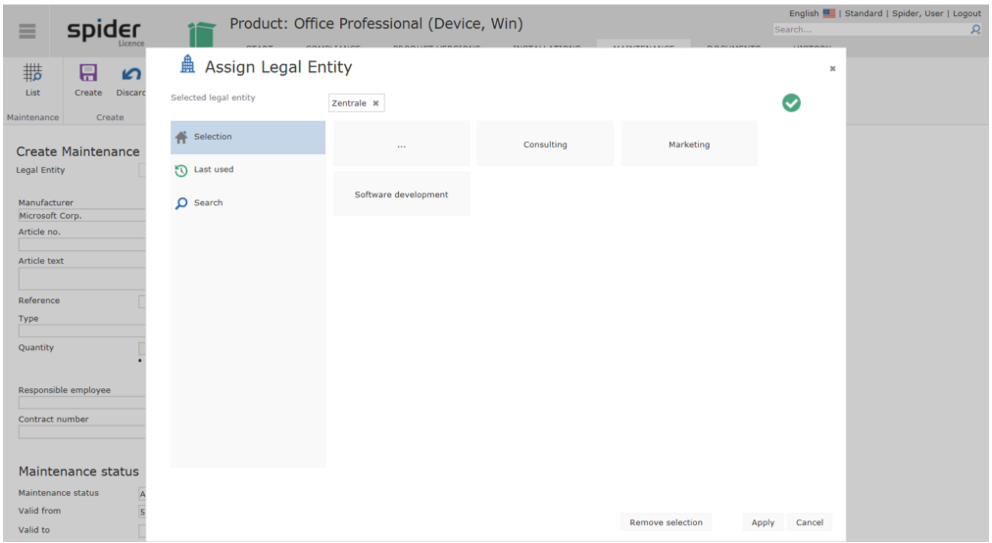
- In the menu area *License inventory* on the home page, click on the **Maintenance** button and then on the **New** ribbon button.

- Click on the **Select product** button.



Select the product for which to create a new maintenance.

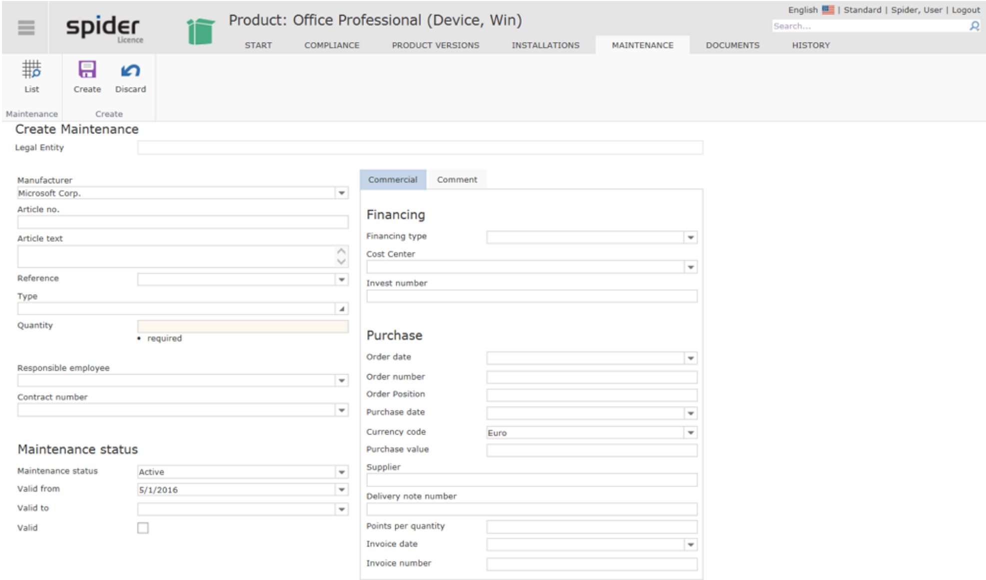
- The following step is optional. When creating a maintenance, you can assign it to a legal entity. Select the corresponding legal entity and click on **Apply**.



- If you want to skip this step, click on **Cancel**.

Note You can also assign the legal entity later in the Edit form of a maintenance. Click into the **Legal entity** field.

- Fill in data fields.



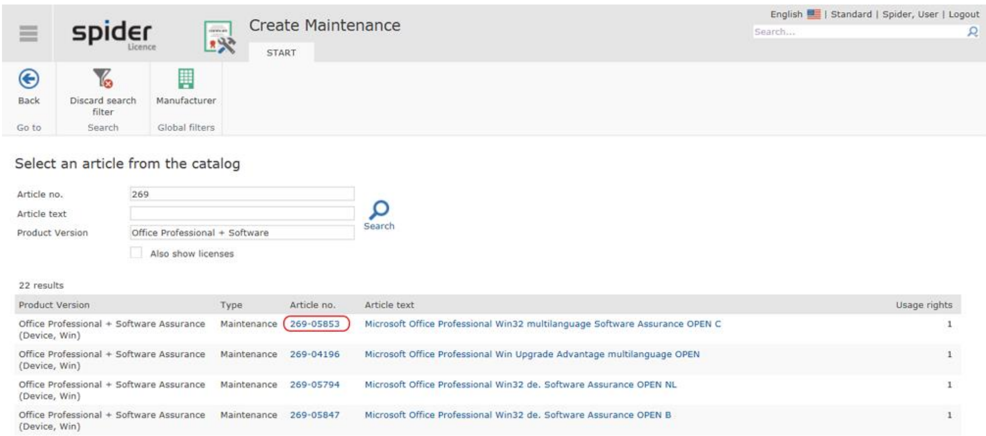
You can enter the data in various fields which either allow for a selection or a direct input. The data fields which must be filled in are marked as mandatory fields.

➢ Then click on the **Create** button.

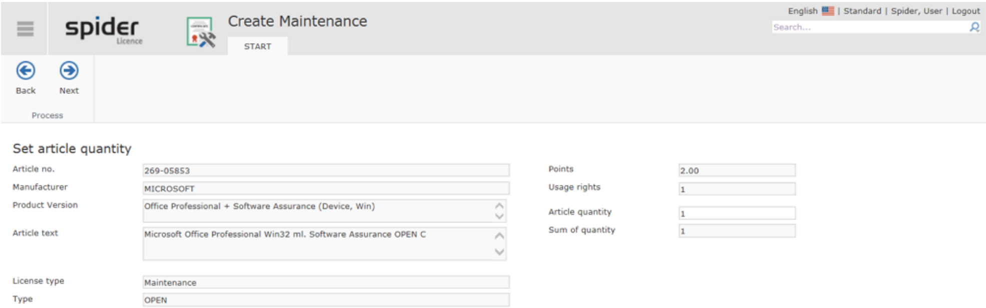
Create maintenance via the article catalog

➢ In the menu area *License inventory* on the home page, click on the **Maintenance** button and then on the **New** ribbon button.

All available articles are offered for selection. Use the article filter to further restrict the selection.



➢ Please select the desired article.



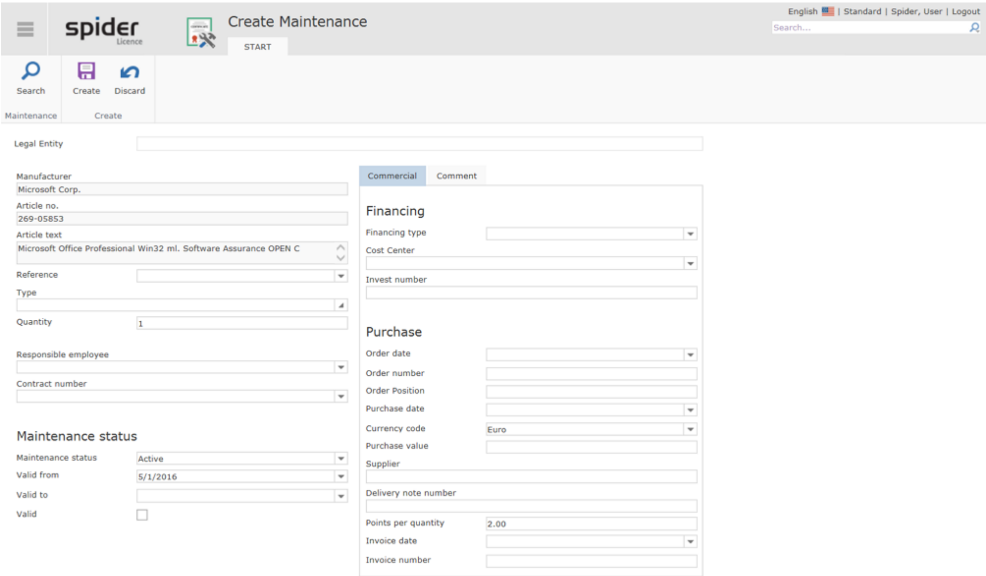
➢ Enter the article quantity and click **Next.**

Assign legal entity

As described for the manual creation, this step is optional. **Details** (see "**Assign legal entity**" on page 167)

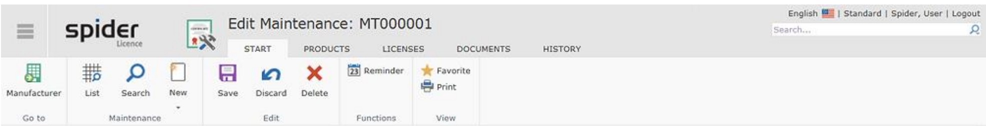
Form for entering the maintenance

Finally, the form for entering the other maintenance data.



➢ Click on the **Create** button to save your input. If you have made changes which shall not be saved or if you want to completely reload the object, you can click on **Discard**.

3.3.2 Navigation



The ribbon offers you the following navigation options:

Ribbon group	Ribbon button	Function
Go to	Manufacturer	Navigates to the manufacturer of the product.
Maintenance	List	Opens by default the list of maintenances.
	Search	Navigates to the search across all maintenances.

3.3.3 Assign legal entity

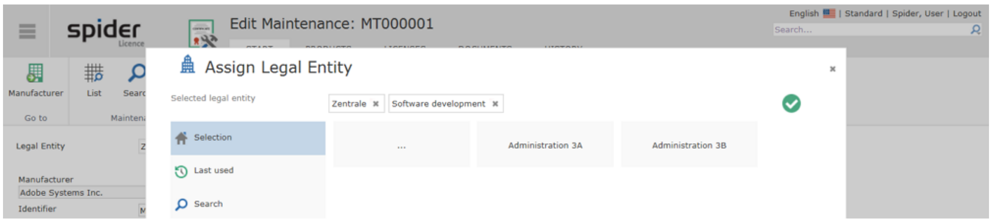
In Spider Licence, users can see maintenances which have been assigned to a legal entity only if they possess a corresponding permission for this legal entity.

The legal entity can be selected directly when creating a maintenance. The assignment of the legal entity can be changed anytime in the Edit form of the maintenances.

If a maintenance has already been assigned to a legal entity, it will be marked in the Edit form of the maintenance as follows:

➢ To assign a maintenance to a legal entity, click into the **Legal Entity field** in the Edit form of the shown maintenance.

Then you can select a legal entity or assign the last used legal entities.



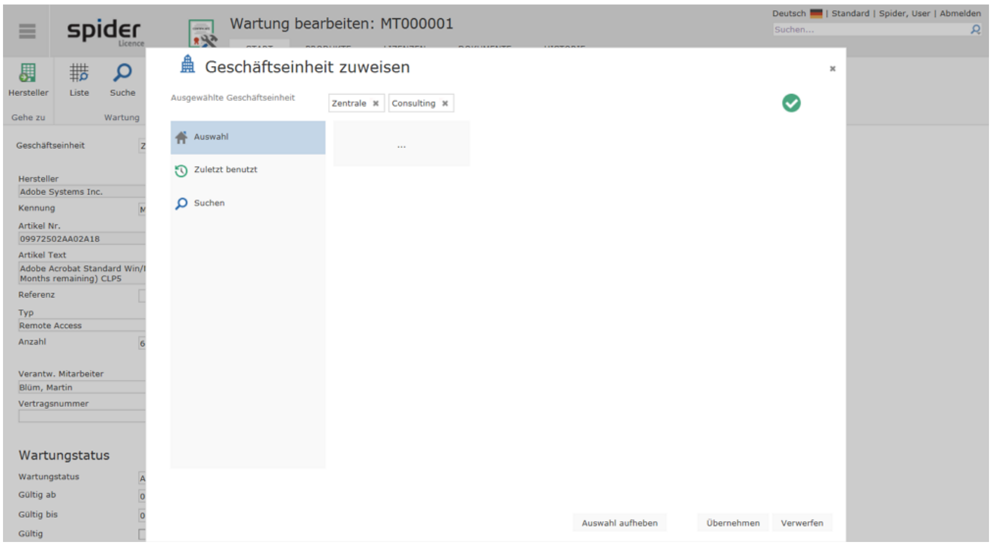
The path to the selected legal entity is displayed in the line *Selected legal entity*.

➢ If there are subordinated legal entities, they can be selected by clicking on the corresponding **tile**.

➢ By clicking on the **tile ...**, the superior level in the legal entity structure will open.

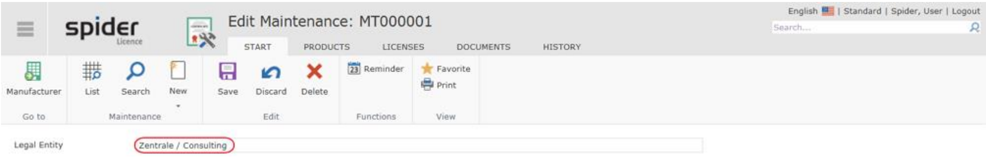
Note	The green tick confirms that a correct assignment is possible. If the user has no rights for a legal entity, he is not allowed to make an assignment (there is no green tick).

➢ Navigate through the structure and select the desired legal entity. For example, select the legal entity *Consulting*.

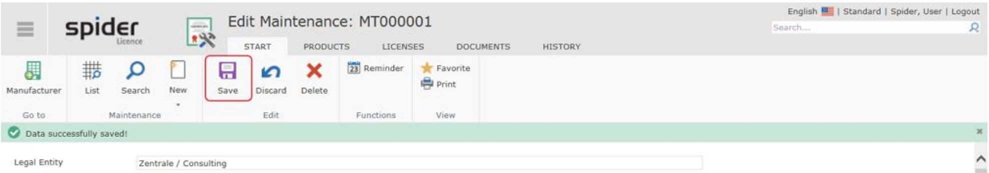


➢ Click on **Apply** to accept your selection.

In the Edit form of the maintenance, the complete path of the affected legal entity is shown.



Attention	The assignment is only successful after the change has also been saved in the Edit form of the maintenance.

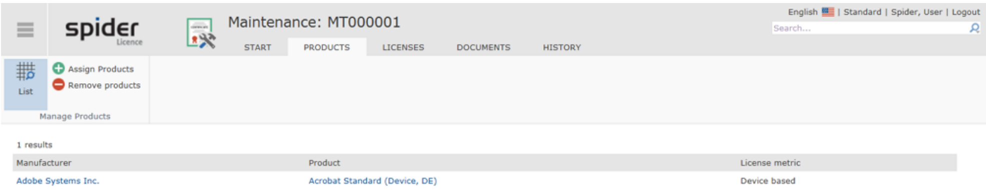


3.3.4 The Products ribbon

The product assignments are managed within a maintenance. The product assignments on the maintenance are required since only licenses of the assigned products can be selected for the maintenance.

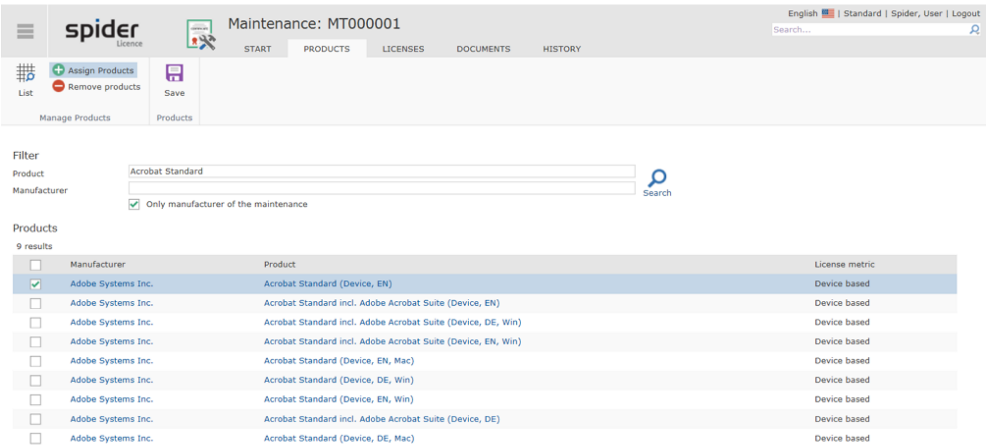
➢ Select the **Products** ribbon.

The list of assigned products will open.



➢ By clicking on the **Assign Products** ribbon button, all not yet assigned products will be shown.

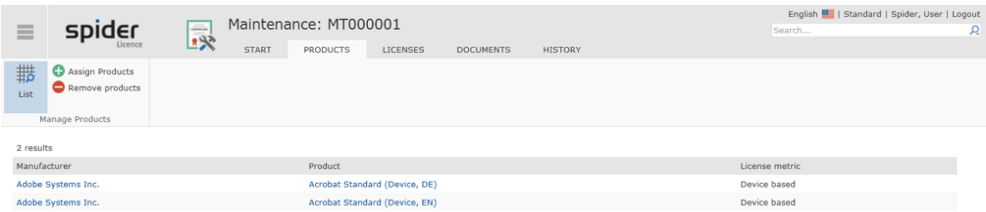
The number of found products can be restricted by a filter.



A selection of individual or more products is carried out by ticking one checkbox per data record.

➢ The selected product assignment is created by clicking the **Save** ribbon button.

When opening the maintenance form again, the product assignments will be shown.

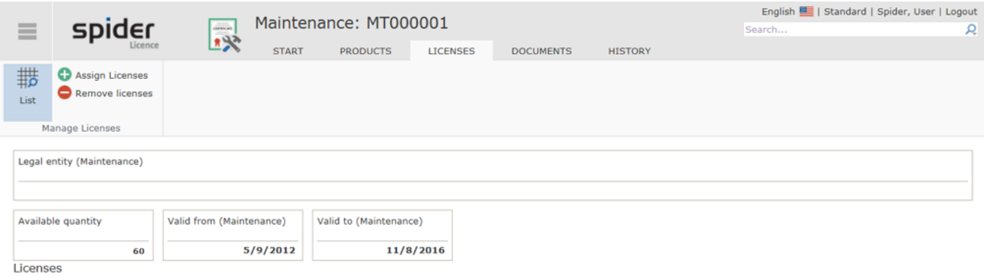


3.3.5 The Licences ribbon

Use the **Licenses** ribbon to open the list of licenses assigned to the maintenance. If no license has been assigned to the maintenance yet, you will be forwarded automatically to the **Assign Licenses** form.

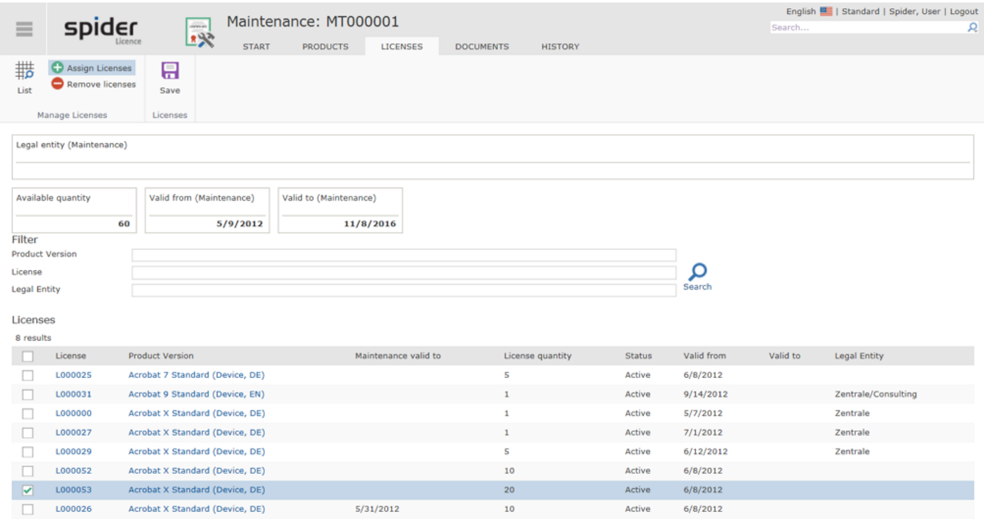
Note	Only licenses of already assigned products can be assigned.

➢ To assign a license to a maintenance, select the **Licenses** ribbon.



➢ Click on the **Assign Licenses** button.

All available licenses of the already assigned products are shown by product version. The licenses and product versions can be restricted using filters.



➢ The assignment of licenses is carried out by activating the corresponding check box.

➢ Click the **Save** button to assign the selected licenses to the corresponding maintenance.

Attention	The total no. of licenses shall not exceed the number / quantity of maintenance contracts. In this case we recommend dividing (see "**Subdividing a license**" on page 186) the existing license.

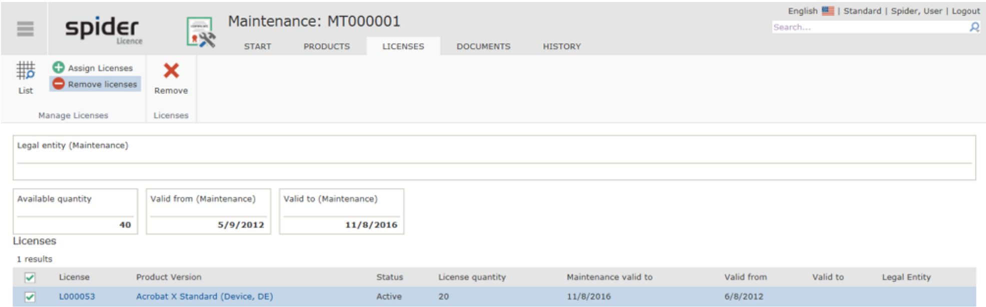
A successful assignment of the licenses is confirmed by a corresponding message.

The selected licenses are now connected to the maintenance. As soon as a current product version of the license is available in Spider Licence, the update for the license is offered in the license maintenance wizard.

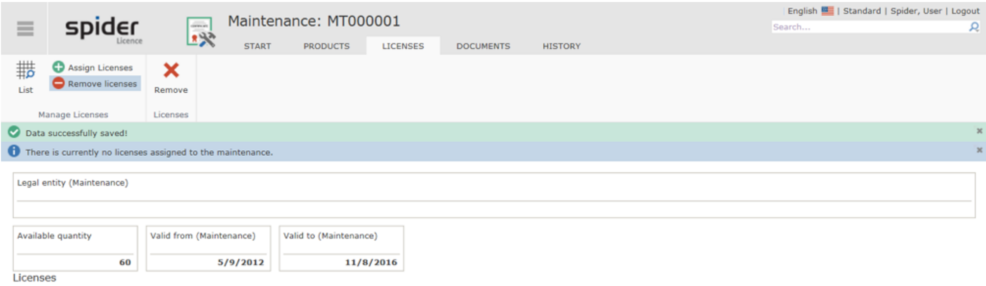
Note	Product versions will be synchronized automatically for products from the product catalog. In case of manually managed products, the product versions must be entered manually.

Remove licenses

Use the **Remove licenses** button to remove assigned licenses from the maintenance.



- ➢ Select the licenses which are to be removed from the maintenance by activating the corresponding check boxes.
- ➢ Then click on **Remove** in the *Licences* ribbon group.



A successful removal of the licenses is confirmed by a corresponding message.

3.3.6 Maintenance wizard for updating licenses

By means of the **License maintenance wizard** you can update licenses to a current product version.

Note Only those licenses may be updated, which have a valid maintenance contract. And only those product versions, the release date of which lies before the end of the maintenance contract, are available for update.

The following example illustrates this process:

Product version	License	Maintenance
Software 1.0	VOL00001	Ends 11/30/2012

Product version	Release date
Software 2.0	03/01/2012
Software 3.0	01/01/2013

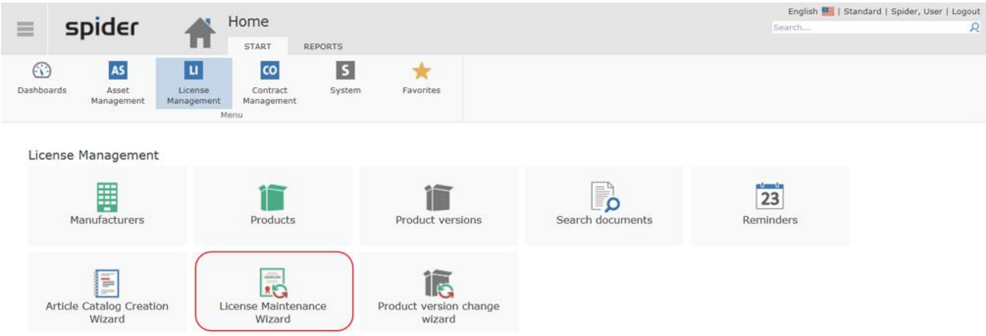
Since the product version 3.0 is only released after expiration of the maintenance (ends 11/30/2012), the **license VOL00001** can only be updated to **product version 2.0**.

Note If the **Release date** is not updated for a product version, no comparison between release date and maintenance end can be made. The update to the new product version is then always offered.

The following instructions explain step-by-step the update of a license by using the maintenance wizard.

1. Start of the license maintenance wizard

➢ Click on the icon of the **Licence maintenance wizard.** You will find the **Licence maintenance wizard** also on the Spider Licence home page in the Licence management section.



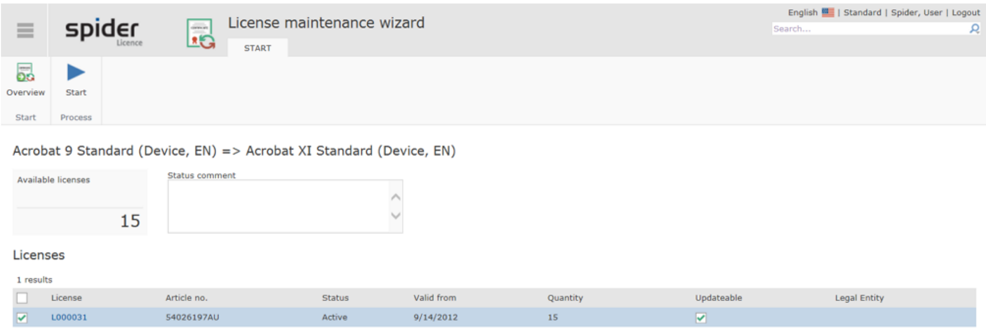
2. Select the product version update

Then the summary of the relevant products will open. The product versions will be shown, which have licenses with maintenances. These versions can be updated to a new product version.

➢ Select a product version to be updated.

3. Select the licenses for the update

Possible license updates will be automatically shown in the work list.

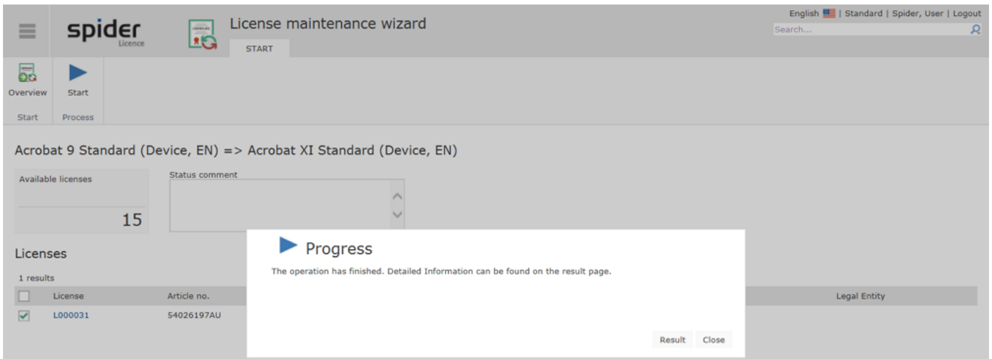


➢ Activate the check box of the license which is to be updated.

➢ Then, click on the **Start** ribbon button.

4. Progress message

The progress message informs you about the progress of the update.



As soon as the update has been finished, you will receive a message.

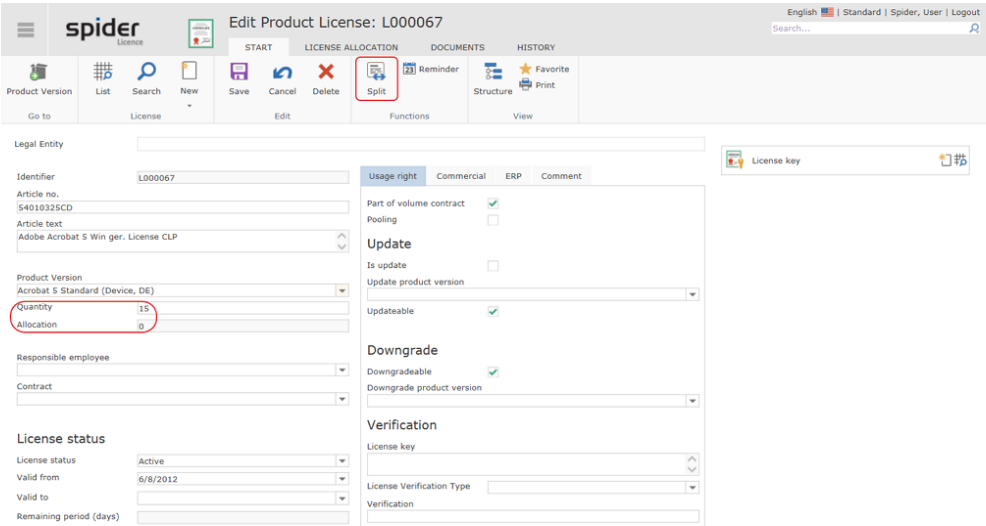
➢ Click on **Result** to view details for the update.

The licenses have been updated successfully.

3.3.7 Subdividing a license

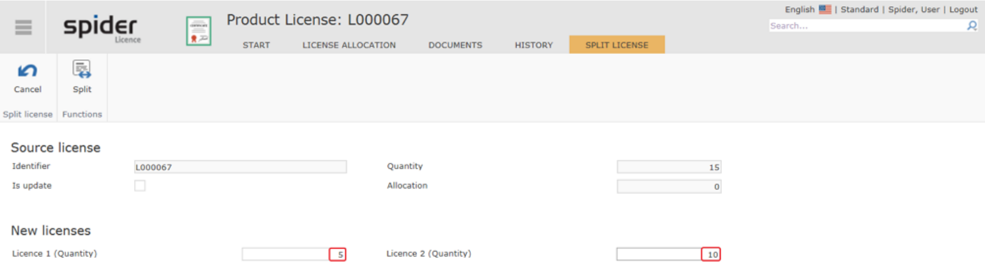
It may be necessary under certain circumstances to subdivide an existing volume license into two smaller volume licenses. This could be necessary if the maintenance contract does not cover the whole volume which makes it impossible to assign the maintenance contract. You can use the **Split** function in the Edit form of the license for this purpose. This function will create two new licenses, update the existing license assignments to one of the new licenses and deactivate (archive) the original license.

➢ In the Edit form of the license to be subdivided, click on the **Split** button in the *Functions* ribbon group.

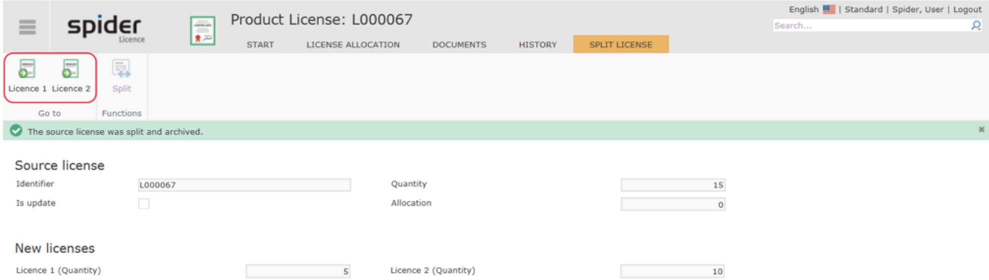


Example:

The available product licenses of the product version *Adobe Acrobat 5* shall be subdivided into 2 new product licenses.



➢ Enter the quantity into the fields License 1 and License 2 and click on the **Split** ribbon button.



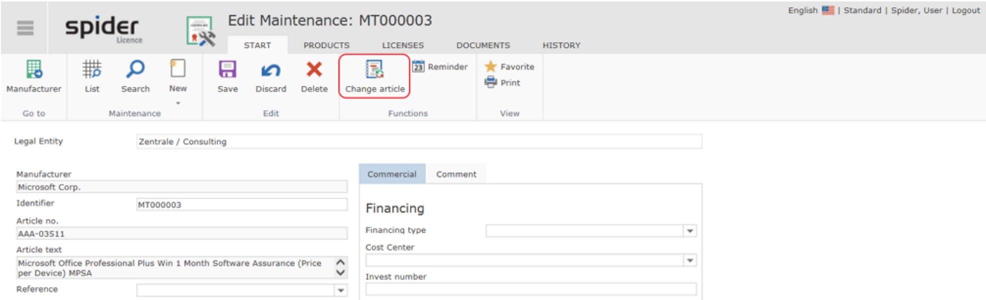
The Splitting wizard will now create two new licenses, update the existing license distribution to the first new license and archive the original license.

Note	Licenses which have already been distributed (assigned) completely (100%), cannot be divided any-more.

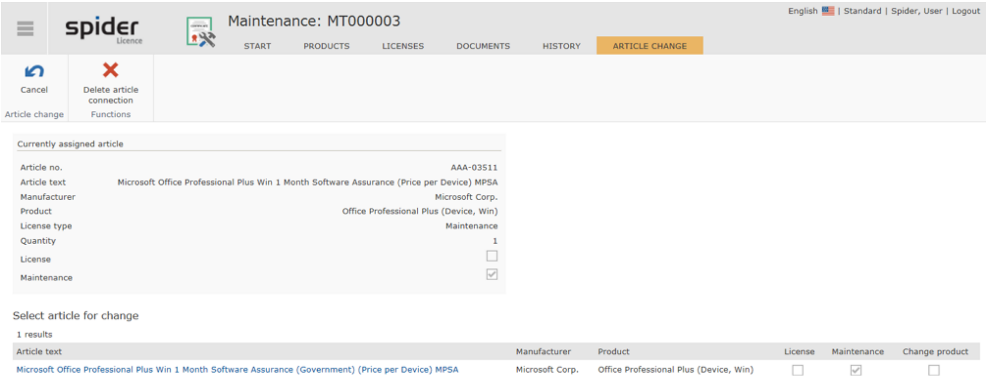
3.3.8 Article change wizard

The **Article change wizard** allows you to modify the assignment of a maintenance to an article. All relevant information is taken over from the article into the maintenance.

➢ Select the maintenance, for which you want to change the article assignment.

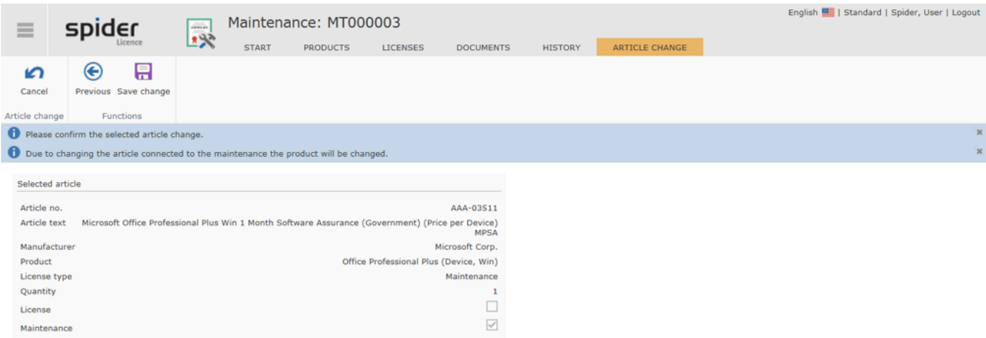


➢ Then, click on the **Change article** ribbon button.



If several articles exist under the same SKU number, they are listed in the result.

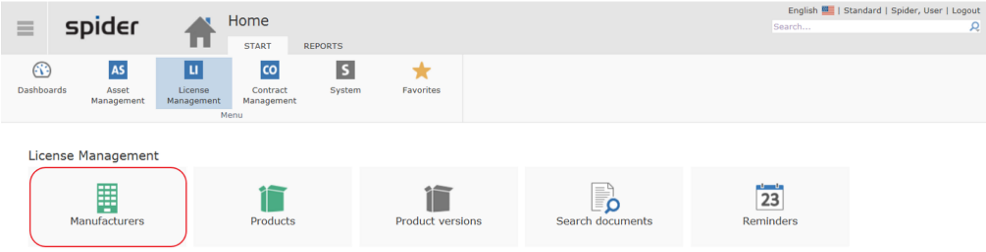
➢ By clicking on the **article text**, an alternative article may be selected.



➢ Click on **Save changes** to complete the article change process.

Note	The article assignment for a shared maintenance cannot be changed.

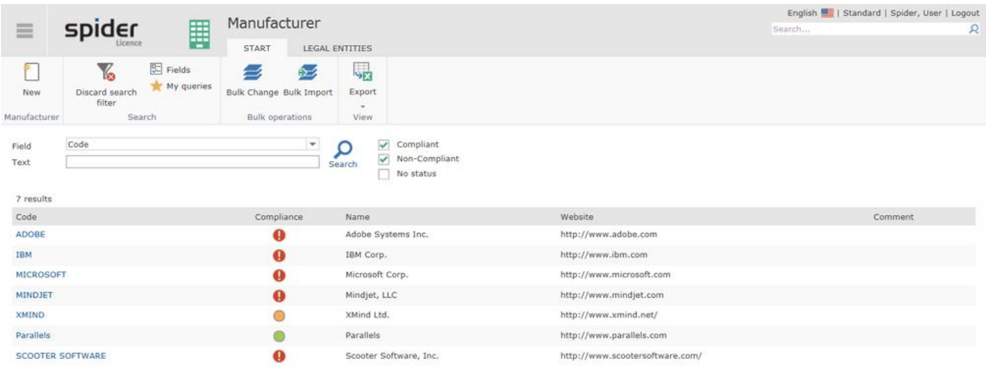
3.4 Manufacturer



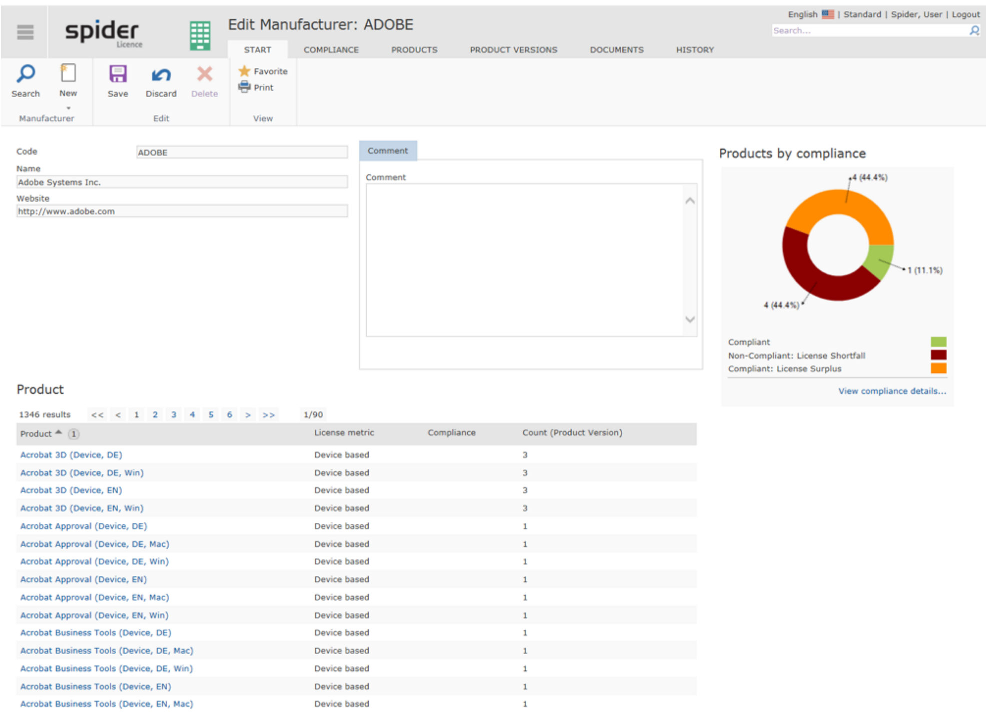
The manufacturers are created by the product catalog or managed manually. This section describes the manufacturer management.

3.4.1 Edit manufacturers

- Select the **Manufacturer** menu item on the Spider Licence home page in the menu section **License management** to navigate to the manufacturer search.
- Alternatively, you can select Spider Licence menu in the **Backstage** (on page 35) and click on the menu item **Manufacturer**.



- Select a manufacturer or refine the search via the **Filter function**.

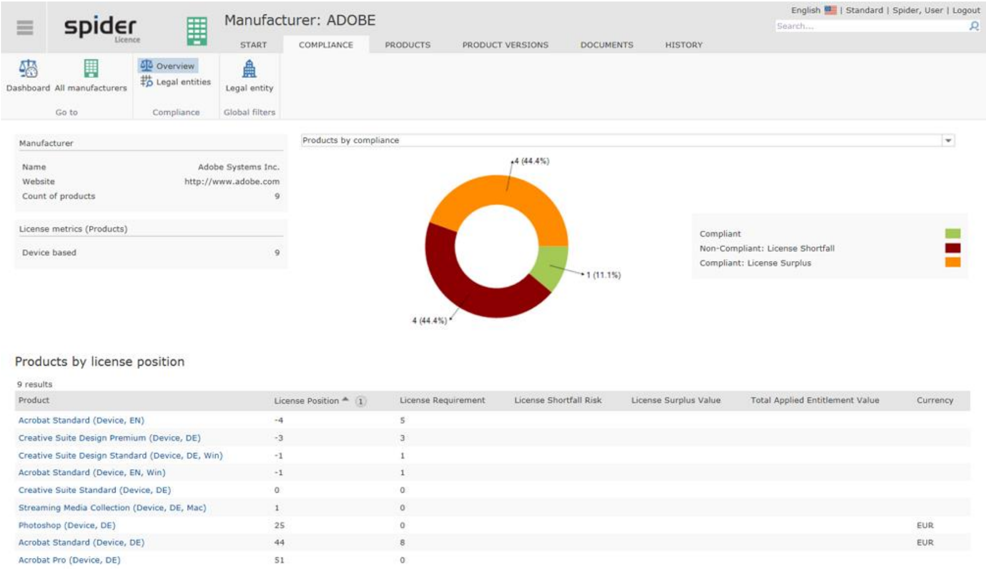


- After editing the data, click on the **Save** ribbon button to save your entered data.

Note	Each time you open the form *Edit manufacturer*, the current compliance degree will be re-calculated and displayed. The table *Product* shows the compliance status of each product as well as the quantity of each product version.

Compliance ribbon

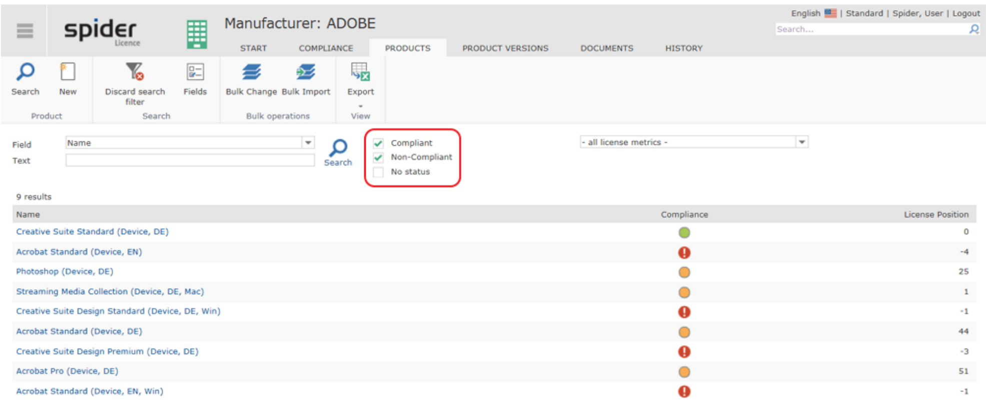
Go to the **Compliance** ribbon to view the compliance overview. **Details.** (see "**Manufacturer compliance**" on page 224)



➢ By clicking on the **Dashboard** ribbon button, you will go to the **Compliance** (see "**Compliance dashboard**" on page 29) dashboard.

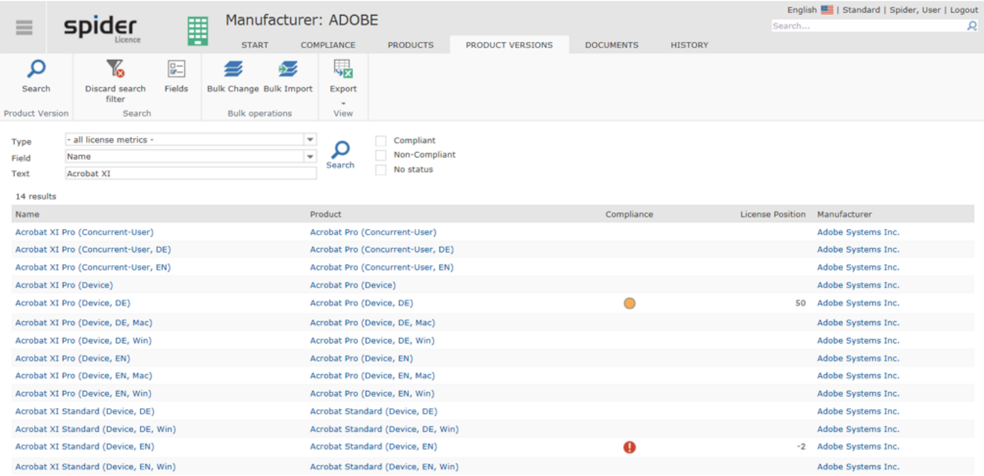
The Products ribbon

Use the **Products** ribbon to open the product list of the manufacturer which is available in Spider Licence. You can search for, open, and edit individual products of the manufacturer as well as add new products.



The Product versions ribbon

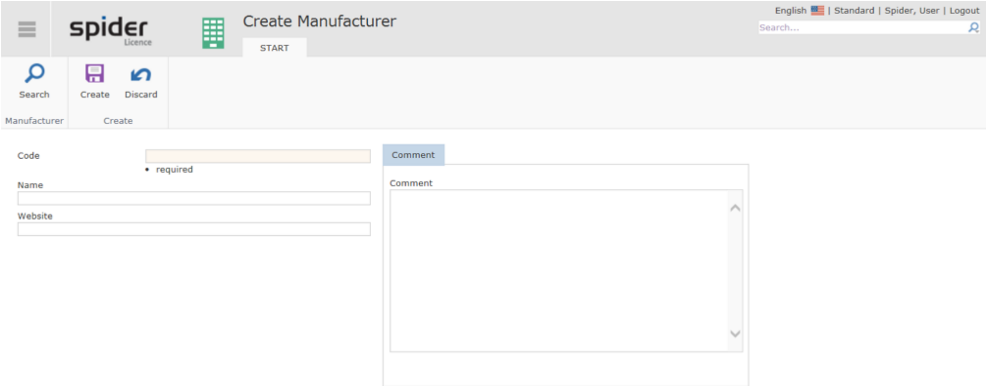
Use the **Product Versions** ribbon to open the list of product versions which is available in Spider Licence. You can search for, open, and edit product versions of the manufacturer.



3.4.2 Create manufacturers

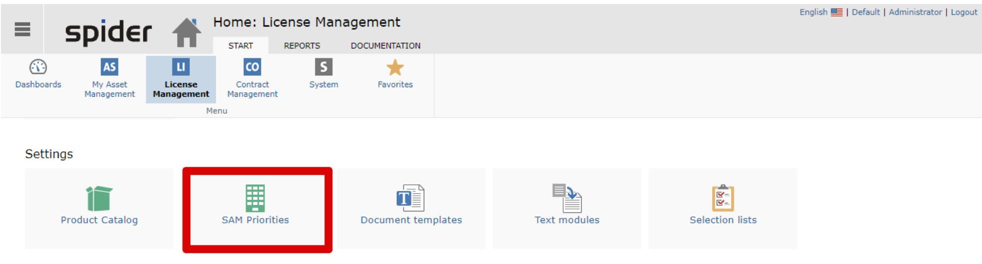
- Click on the **New** button in the manufacturer search or in the Edit form of a manufacturer to create a new manufacturer.

The form for entering the manufacturer data will open. Fill in the corresponding fields and click on the **Create** button to save your entered data.



The data fields which must be filled in are marked as mandatory fields.

3.4.3 SAM Priorities

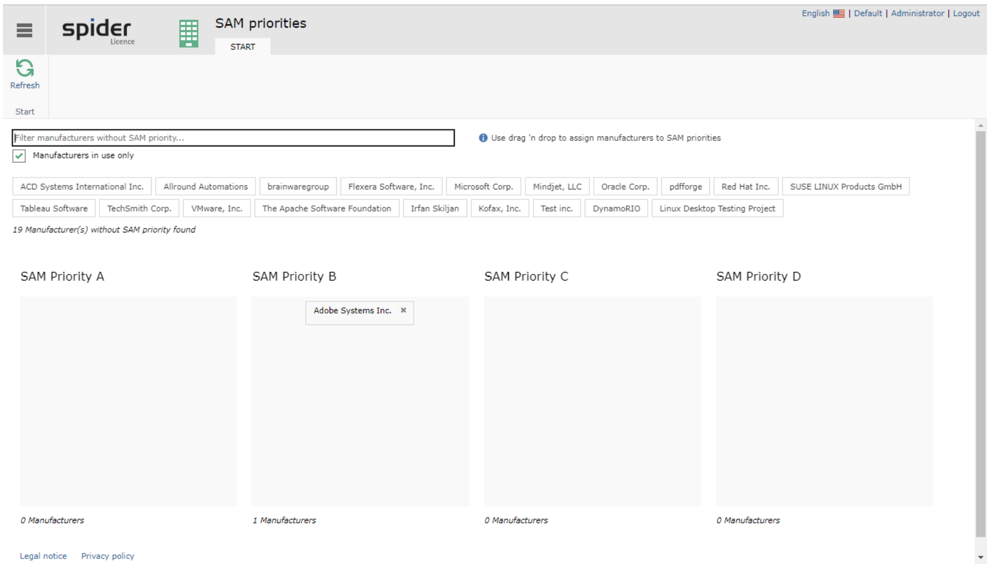


To enable data evaluations in groups of manufacturers, several manufacturers can be combined in one priority. Instead of a manufacturer filter with a single manufacturer as a criterion, groups of manufacturers can be regarded this way.

Spider does not come with predefined SAM Priorities.

Configure SAM priorities

The page shows up with a search field as well as four priority pools. The manufacturer groups **SAM Priority A** to **SAM Priority D** can be dragged from the search area to the group areas of the desired group by dragging manufacturer tiles.



To add a specific manufacturer to priority group A, proceed as follows:

- From the Spider License home page, select **SAM Priorities** in the **Settings** menu area.
- Enter the name of the manufacturer in the search field. As you type, the list of possible manufacturers is filtered. If the manufacturer you are looking for is not among the results, make sure that products from the manufacturer are actively used in the system or uncheck "**Only manufacturers in use**" option.
- Then drag the tile of the desired manufacturer into the darker area of the respective group. The manufacturer's tile should now be listed in that group.

A manufacturer can only be a member of one priority group at a time.

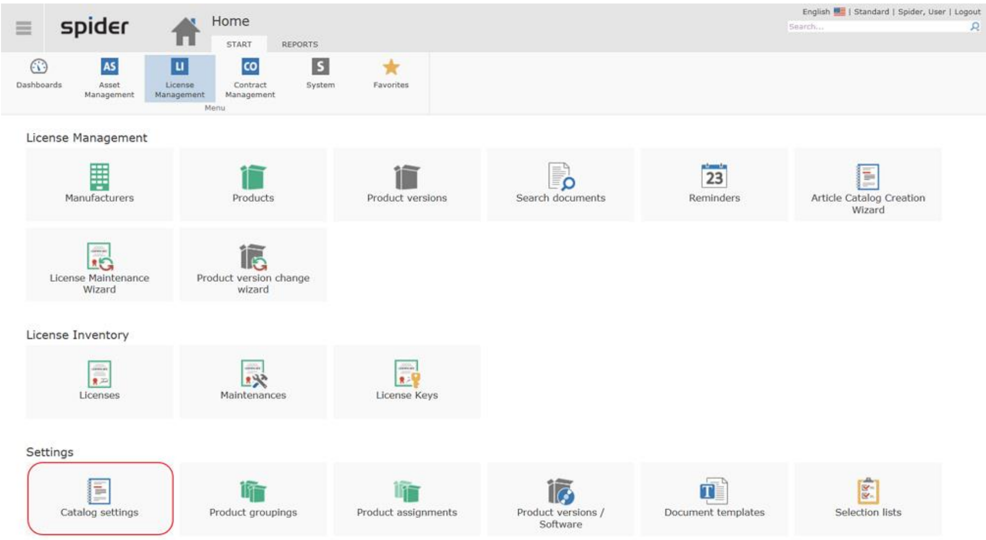
To remove a manufacturer from a priority group, click the X button of the manufacturer tile. If you want the manufacturer tile to move to another group, drag it to the target group with the mouse. The tile then disappears from the original group and appears in the new one.

3.5 Product catalog

The **Product catalog** is a functionality of Spider License and contains **Manufacturer**, **Products**, **Product versions** and **License metrics** which are required for the license management. By default, the desired data are selected from the product catalog and automatically inserted in the Spider license management. If necessary, however, e.g. if a product is not available in the catalog, you can manually create and maintain **Manufacturers** (see "**Manufacturer**" on page 189), **Products** (see "**Manage products**" on page 198), **Product versions** (on page 203).

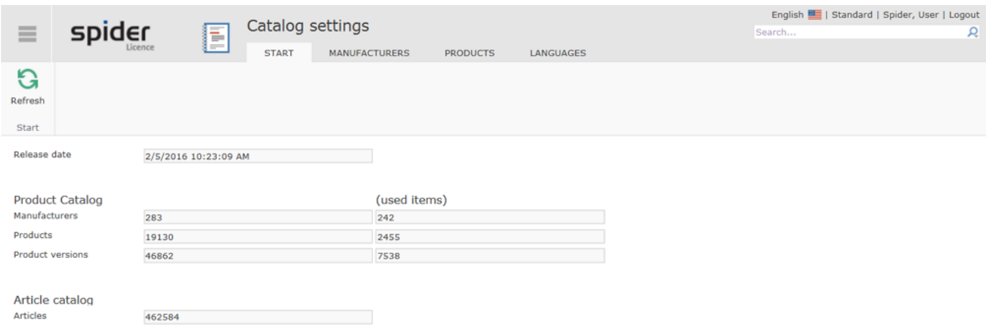
Products, which have been selected from the product catalog, will be updated by the system. This means that by using new catalog definitions, the newest product versions can be delivered and automatically added in Spider License.

- Select the **Catalog settings** menu item on the Spider License home page in the menu area **Settings**.
- Alternatively, you can select Spider License menu in the **Backstage** (on page 35) and click on the menu item **Catalog settings**.



Note	If products are not available in the Spider product catalog, they may be created and managed manually in Spider License. For more information, please refer to section **Manage products** (on page 198).

The Catalog settings form contains a summary of the manufacturers and products currently available. For more information about the products and their usage please refer to the ribbons Manufacturer and Products.

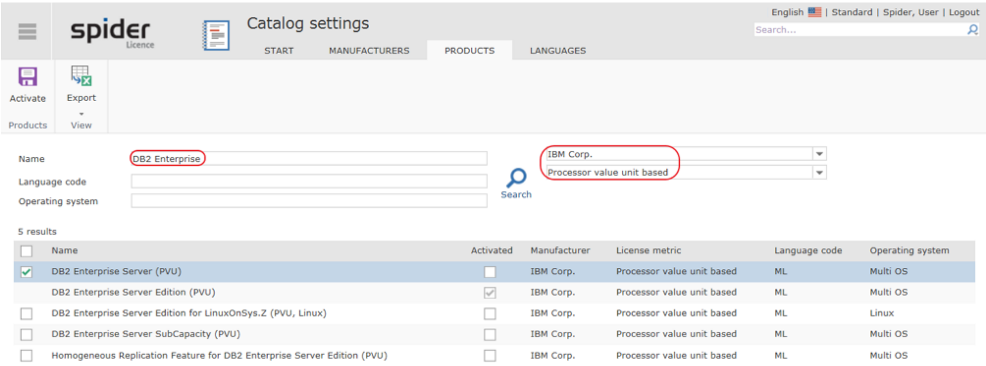


3.5.1 Selection of the products

Under Catalog settings you have the option to select individual products for usage in the system.

- To go to the selection of products, click on the **Products** ribbon under **Catalog settings**.

- Use the **Search** to search for a product or restrict the display of products by **Manufacturer filter** or **License metric filter**.



To use products in Spider Licence, you will have to add them to the selection.

- To add products, activate the corresponding checkbox.
- Then, click on the **Activate** button.

This will start a background process which creates the related structures in Spider Licence and copies the product information and product versions including the license metric data.

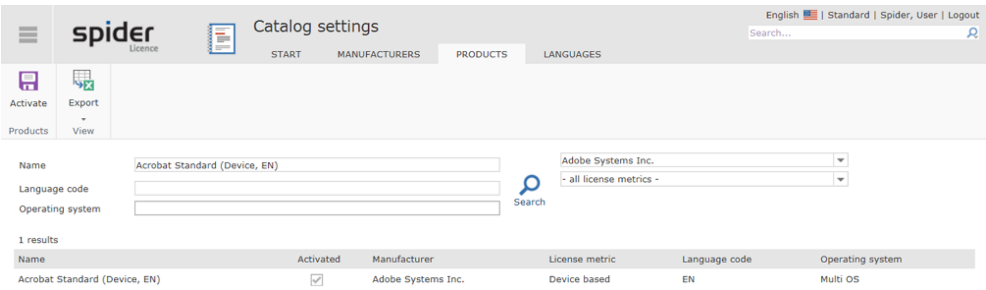
Note	The automatic service needs a few minutes to create and complete the data records. Only then, the units are available for further editing in the system.

Important	Products in the product catalog can only be edited with limitations and cannot be deleted. Most of the fields are write-protected. For some functions, which are identical for the editing of products from the product catalog and for the editing of manually created products, please refer to the chapter **Edit products** (on page 199).

The product includes several product versions of a license metric and allows for evaluations across several versions. One product corresponds to the software edition.

The product comprises the license inventory and the license requirement of a software over several product versions. Cross-version downgrade, pooling and compliance evaluations are created on the product level.

Example: The product **Acrobat Standard (Device, EN)** contains all versions of the edition **Standard (Device, EN)**.

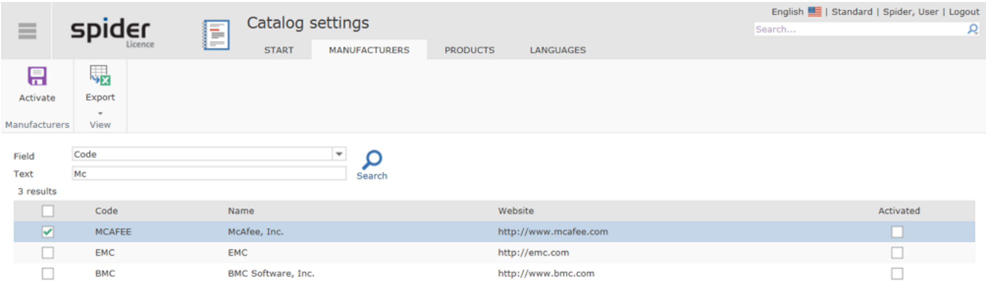


3.5.2 Selection of manufacturers

Under Catalog settings you have the option to select products on the manufacturers level for usage in the system. If a manufacturer is selected, all products of this manufacturer which support the selected languages will be added to the system.

- To go to the selection of manufacturers, click on the **Manufacturer** ribbon under **Catalog settings**.

➢ By means of the **Field search** you can restrict the manufacturer list.



To use products of selected manufacturers in Spider Licence, you will have to add the corresponding manufacturers to the selection.

➢ To add a manufacturer, activate the corresponding checkbox.

➢ Then, click on the **Activate** button.

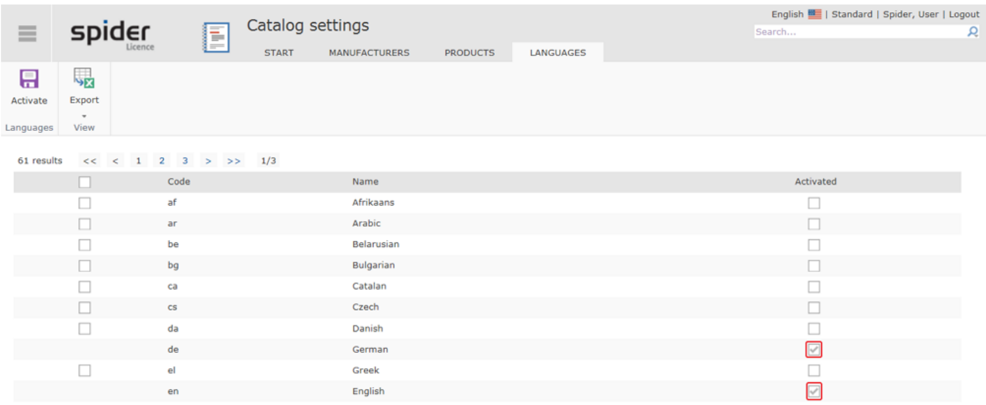
This will start a background process which creates the related structures in Spider Licence and copies the product information and product versions including the license metric data of all products of this manufacturer.

Note	The automatic service needs a few minutes to create and complete the data records. Only then, the units are available for further editing in the system.

3.5.3 Selection of the language

The supported languages must be set in the catalog settings. Only the products of the selected languages are transferred to Spider Licence. The selection of the products is carried out per product or via the manufacturers.

➢ To go to the selection of languages, click on the **Languages** ribbon under **Catalog settings**.



To use products in selected languages in Spider Licence, you will have to add the corresponding languages to the selection.

Note	The languages ML is used for Multi Language.

➢ If you want to add other languages, please activate the corresponding **checkbox** in the left column.

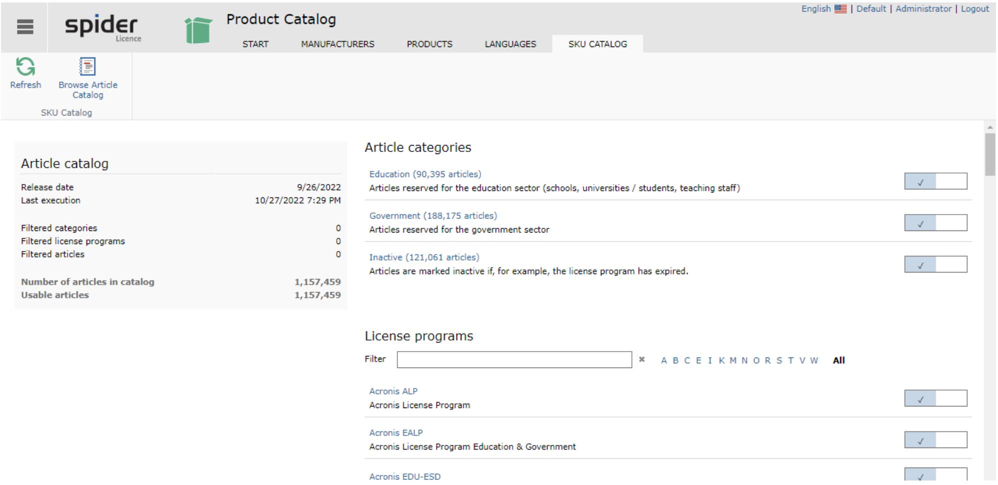
➢ Then, click on the **Activate** button.

Attention	Selected languages cannot be reset anymore.

3.5.4 SKU-Catalogue

To keep the database lean, the product catalog can be limited to used article categories or license programs. The normal case is to use all categories and license programs. If you can do without license programs, e.g., for education or government, the product catalogue can be restricted here.

- To get to the SKU catalogue selection, click the **SKU Catalogue** tab in the **Product Catalogue** settings.



An article category or a license program is selected if the right column shows a check mark. Clicking on it changes the state. If a search for a SKU is made in the article catalogue whose program or category has been deselected, it will no longer be found. The creation of a license or maintenance objects with one of these SKUs will no longer be supported directly.

3.6 Manage products

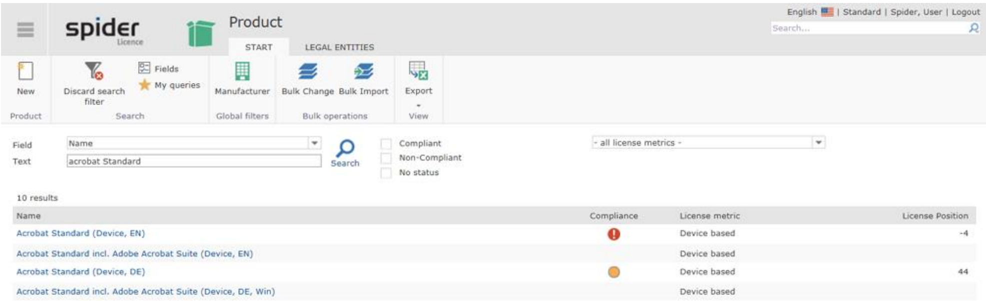
By default, the products are created and managed using the Spider product catalog.

3.6.1 Create products

If products are not available in the Spider product catalog, they may be created and managed manually in Spider Licence.

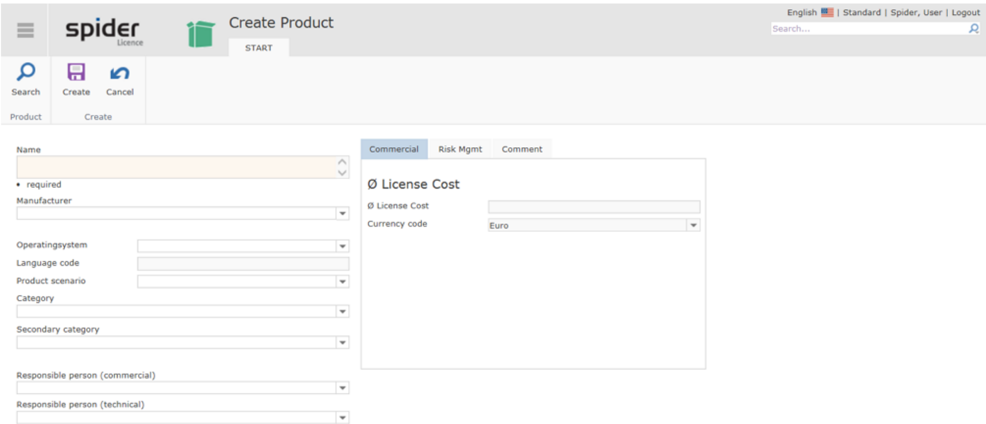
➢ To edit a product, click on the menu item **Product** in the menu of the Spider Licence home page or in the **Backstage** (on page 35).

The existing products are listed in the product search and can be further filtered using the global filters or the field search.



If a product is missing, you can generally **select** (see "**Selection of the products**" on page 194) this via the product selection in the product catalog.

➢ Should it nonetheless be necessary to manually create a product, click on the **New** ribbon button in the form above.

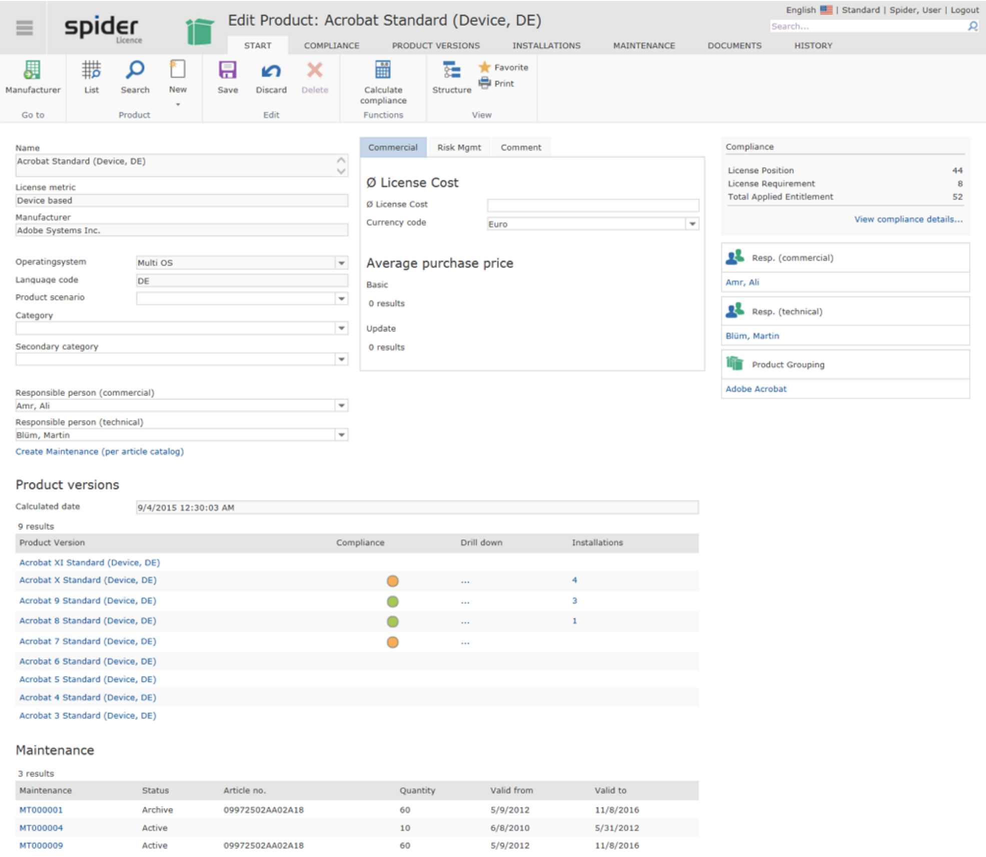


➢ Supplement the input fields and complete the process by clicking on the **Create** ribbon button.

3.6.2 Edit products

- ➢ To edit a product, go to the Spider Licence home page and click, either in the menu or in the **Backstage** (on page 35), on the menu item **Product**.
- ➢ Use the **Field search** to search for a product or restrict the display of products by a **Manufacturer filter**.
- ➢ Then click on the product which you want to edit.

The Edit form will show you the details of the selected product.



Accessing product versions of the product

Depending on the configuration, you can show them directly in the Edit form. The illustration shows the summary of product versions. Apart from a direct jump in one of the product versions, the summary also shows the result of the license position under consideration of the downgrade and pooling allocation. A red icon shows that there are not enough licenses.

- ➢ After editing the data, click on the button **Save** to save your entered data. If you have made changes which shall not be saved or if you want to reload the object, you can click on **Cancel**.

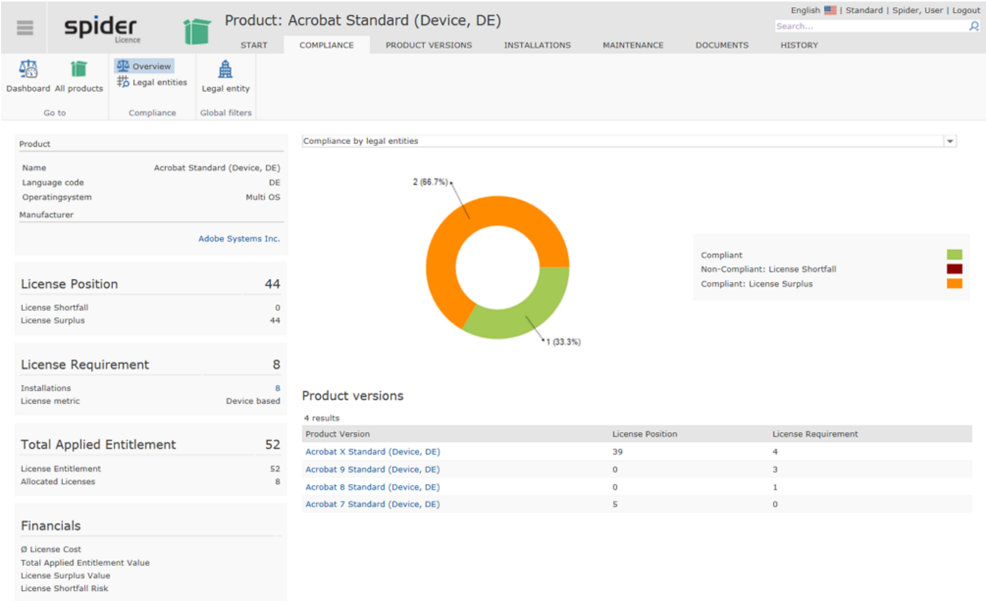
Note	The user has more options for editing products which are managed manually than for products from the **Spider** product catalog.

Calculate compliance

The calculation of the license compliance of the products takes place automatically daily. You can use the **Calculate compliance** button to get a current calculation if there have been changes to the system. For more information about the compliance for products, please refer to the section Compliance for a product under the section **Compliance evaluations** (on page 223).

3.6.3 Compliance ribbon

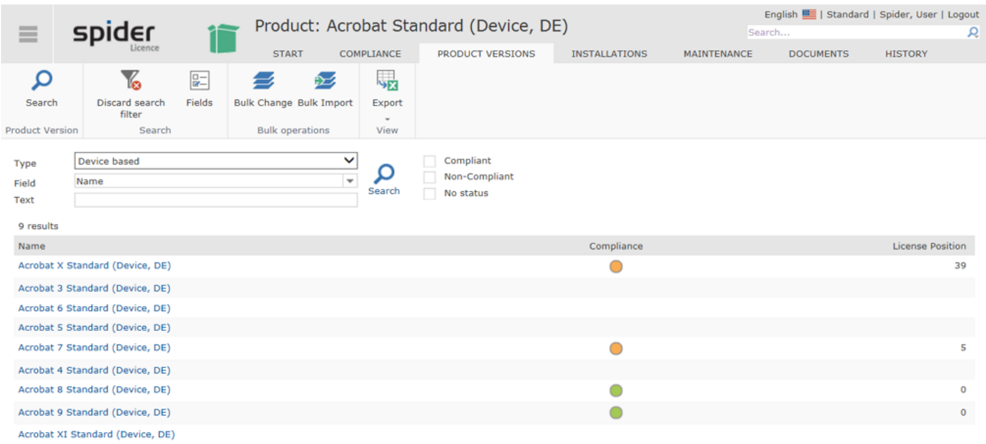
Go to the **Compliance** ribbon to view the **Compliance overview** (see "**Product compliance**" on page 227).



➢ By clicking on the **Dashboard** ribbon button, you will go to the **Compliance dashboard** (on page 29).

3.6.4 The Product versions ribbon

From the product you will be taken directly to the product versions by selecting the ribbon **Product versions**. In the list view of the product versions, you have the option to restrict the result by means of the field search if required.

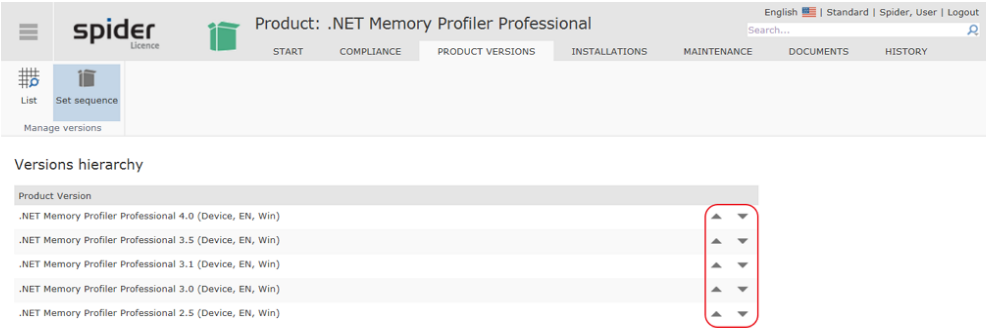


For more details refer to **Product versions** (on page 203).

Sequence of product versions

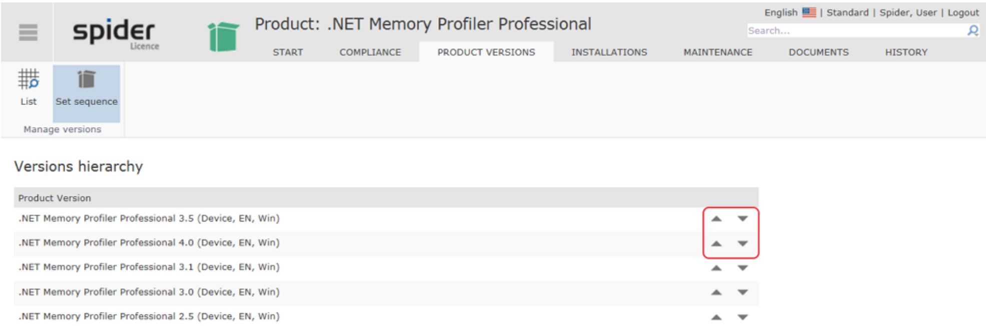
For products which have been created manually, you must determine the sequence of product versions. If newer product versions are created, they will always be shown as most current version. However, if older product versions are added later, you will have to adapt the sequence of the product versions accordingly.

To use this function, click on the **Product versions** ribbon in the Edit form of a product and then on **Set sequence** button.



The sequence of product versions is most important especially for the correct downgrade allocation of the licenses. The latest version is in first place and the oldest version in last place.

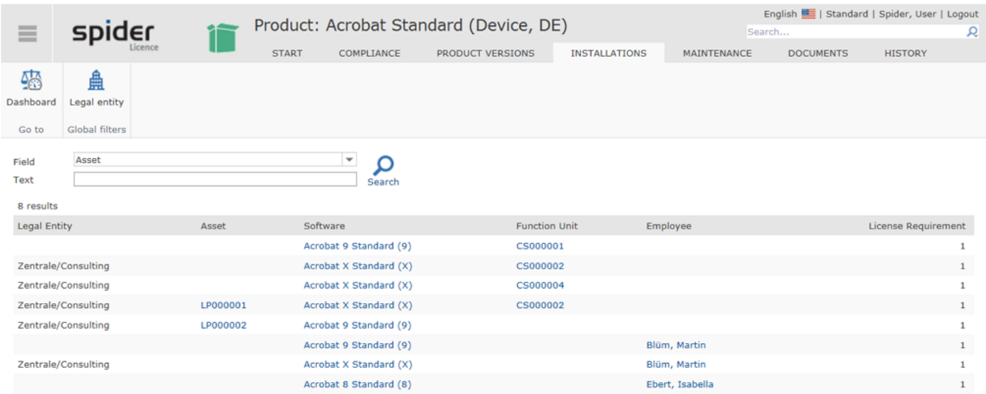
Change the sequence of the product versions by using the arrows ▲▼.



➢ Use the arrows to move version 2.5 down step-by-step.

3.6.5 Installations ribbon

By going to the **Installations** ribbon, you can view all *assets, function units and employees* which are assigned to this product.

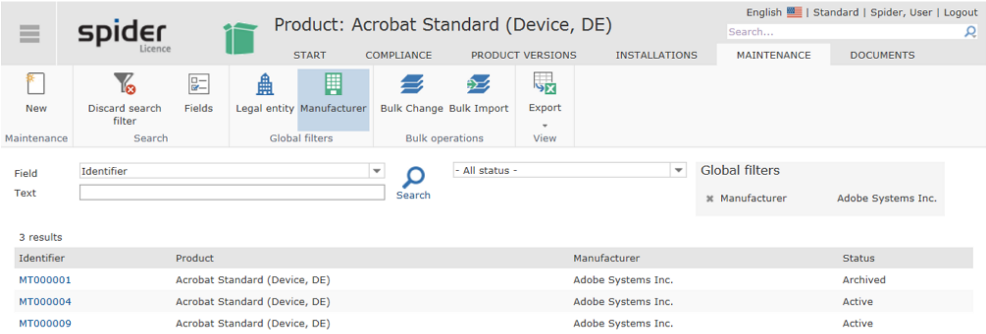


Use the links to navigate to the corresponding objects in Spider Asset.

➢ By clicking on the **Dashboard** ribbon button, you will go to the **Compliance dashboard** (on page 29).

3.6.6 The Maintenance ribbon

From the product you will be taken directly to the assigned maintenances by selecting the **Maintenance** ribbon. In the list view of the maintenances, you have the option to restrict the result by means of the field search if required.



For more details refer to **Maintenance** (see "**Maintenances**" on page 175).

3.6.7 Navigation

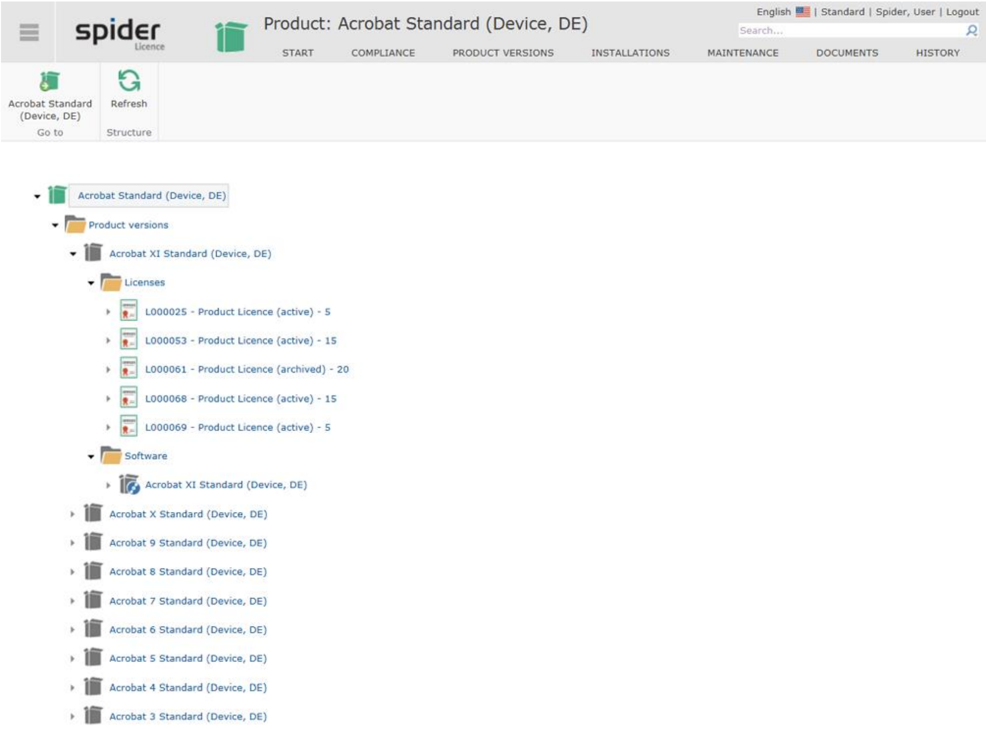
The ribbon offers you the following navigation options:

Ribbon group	Ribbon button	Function
Go to	Manufacturer	Navigates to the manufacturer of the product.
Product	List	Opens by default the list of products which are available for the corresponding manufacturer in the system.
	Search	Navigates to the search across all products.
View	Structure	Opens the product structure view. Click on Structure in the View ribbon group. The structure view shows all objects of the product (product versions, licenses, license allocations) and allows for a quick navigation.

3.6.8 Structure view

The product structure shows all objects within the product as a tree structure. From this view you can open product versions, licenses, license keys, license allocations and software assignments or navigate among them.

- To view the structure, click on the **Structure** ribbon button under the **Start** ribbon in the Edit form of an object.



3.7 Product versions

This section describes the functions of the Product versions object. If a product is available in the product catalog, also the product versions will be maintained via the product catalog. If the product had been entered manually, also the product versions must be entered manually. The user has more options to edit product versions which are not contained in the product catalog. In this section the corresponding functions are explained in more detail.

Spider Licence manages the licenses of the license-bound software versions of the manufacturers such as the versions of Microsoft Office 2003 and Office 2007.

A technical separation of software versions such as e.g., Microsoft Office 2007 (11.8010.8107) SP2 is not relevant for the license management, since a license covers all service states of a license-bound software version of a product.

For each product version, the licenses of which can be exchanged, you must create a separate product version. If various license metrics are available for a product version, e.g., client or processor-based, you must create a separate product version for license metric. Hence, the product version contains a list of the licenses of a software version in a license metric, which is considered as license inventory.

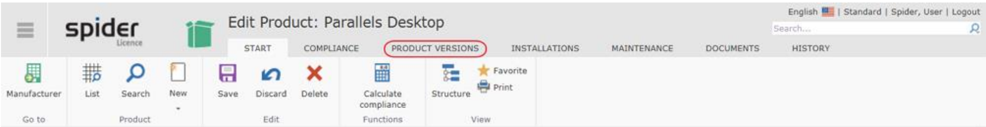
To determine the license requirement, technical software is assigned to the product version, which is installed and detected via inventory systems. The software, its installation as well as the related license requirement are managed in Spider Asset. The software installations as well as the license requirements are managed and maintained manually or automatically via software inventory systems. A summary of the license requirement is shown in the product version. The licenses of the product version represent the license inventory. When calculating the license positions and the compliance, the license requirement and the existing licenses are compared per legal entity. The calculations are very complex due to downgrade and pooling allocations. The result will show on the product version level whether there are enough licenses so that the license requirement of the product version is covered.

3.7.1 Create product versions

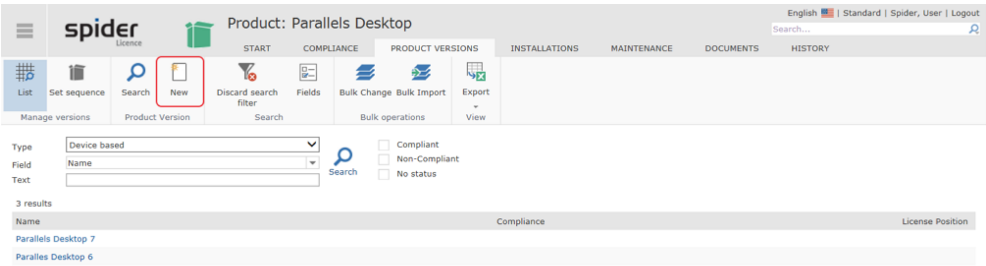
Note In case of products which have been created via product catalog, also the product versions will be create and maintained via the product catalog.

In case of products created manually, the creation of new product versions is done by using the following steps:

- ➢ To create a new product version, select the product for which you want to create a product version.
- ➢ In the menu of the Spider Licence home page or in the **Backstage** (on page 35) click on **Product**.
- ➢ Use the **Field search** to search for a product or restrict the display of products by a **Manufacturer filter**.
- ➢ Click on the product which you want to edit.



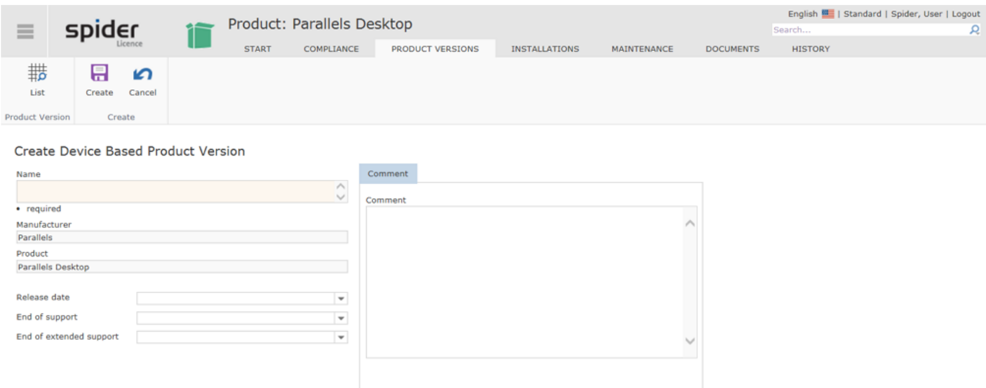
- ➢ Go now to the **Product versions** ribbon and click on the **New** ribbon button.



- ➢ If there are no product versions available for the product, select the corresponding **License metric**.

Important In the course of license management, you must observe the used license metric of the license. When first creating the product version for a product, you must select a license metric which applies for all other product versions.

The creation form for the product version will open.



- ➢ Complete the input fields and click on the button **Create** to create the product version.

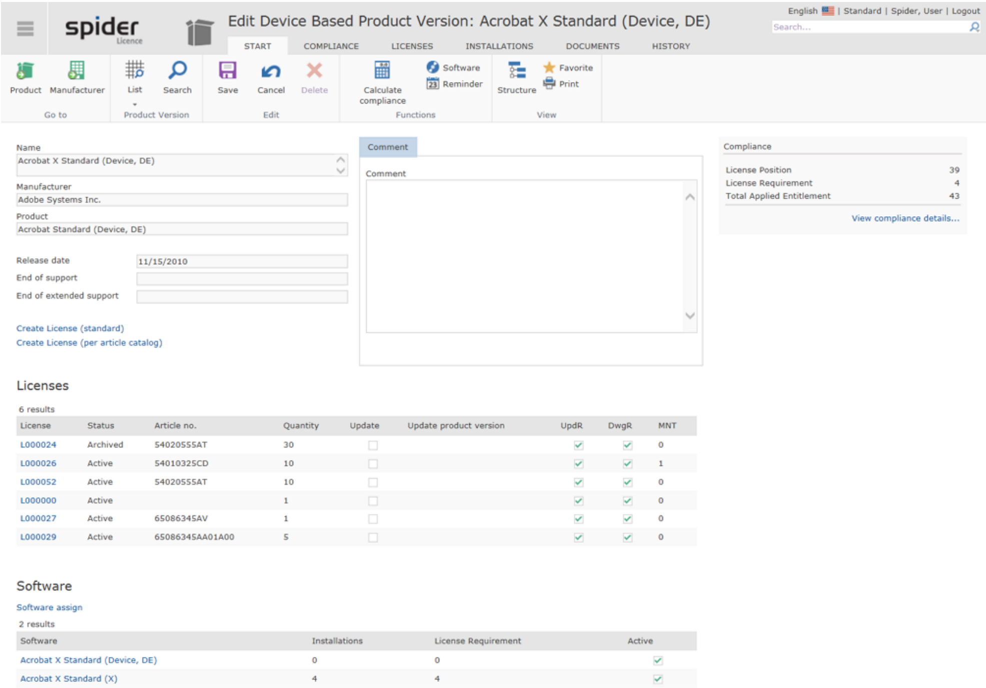
Important The **Name** field is a mandatory field. It identifies a product version as exactly as possible and should contain specification regarding edition and version of the software.

The product version will be created automatically as most current product version within the product.

3.7.2 Edit product versions

- To edit a product version, click on the menu item **Product version** in the menu of the Spider Licence home page or in the **Backstage** (on page 35).
- Use the **field search** to search for a product version or restrict the display of product versions by using **global filters**.
- Then click on the **product version** you want to edit.

The Edit form will show you the details of the selected product version.



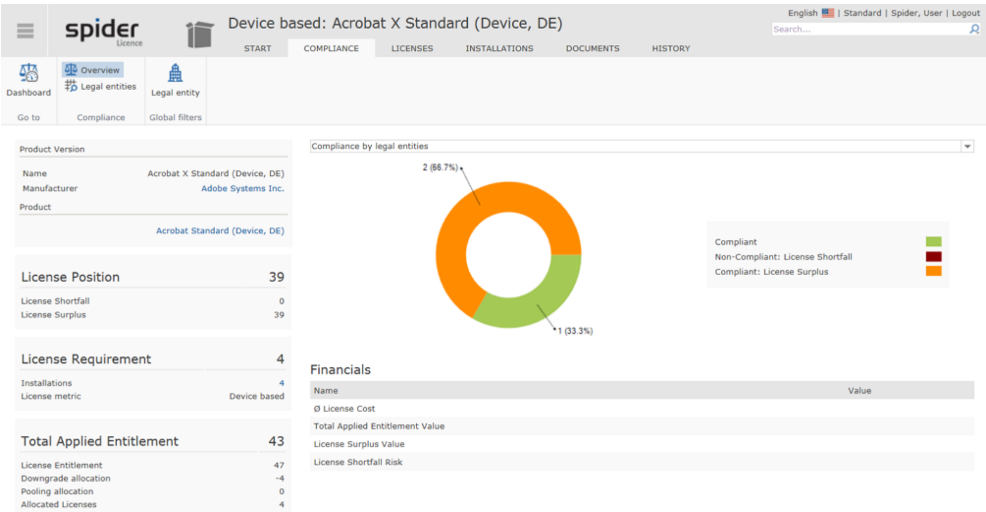
License	Status	Article no.	Quantity	Update	Update product version	UpdR	DwgR	MNT
L000024	Archived	54020555AT	30	☐		☑	☑	0
L000026	Active	54010325CD	10	☐		☑	☑	1
L000052	Active	54020555AT	10	☐		☑	☑	0
L000000	Active		1	☐		☑	☑	0
L000027	Active	65086345AV	1	☐		☑	☑	0
L000029	Active	65086345AA01A00	5	☐		☑	☑	0

Software	Installations	License Requirement	Active
Acrobat X Standard (Device, DE)	0	0	☑
Acrobat X Standard (X)	4	4	☑

For a more detailed evaluation go to the ribbon **Compliance** or click on the Link **View Compliance details...**.

3.7.3 Compliance ribbon

Go to the **Compliance** ribbon to view the **Compliance overview** (see "**Product version compliance**" on page 230).

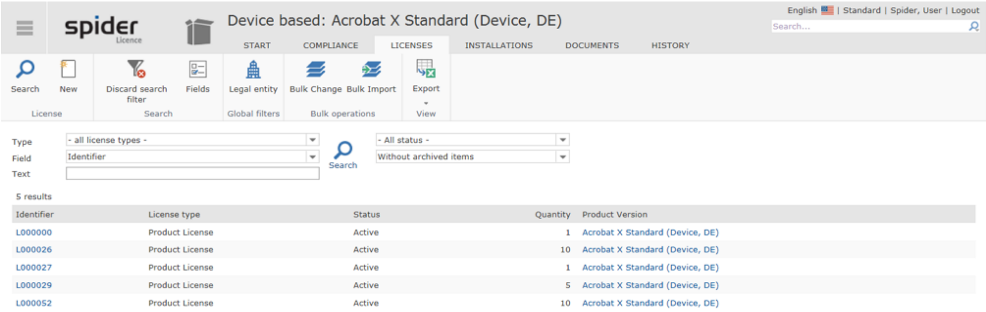


- By clicking on the **Dashboard** ribbon button, you will go to the **Compliance dashboard** (on page 29).

3.7.4 The Licenses ribbon

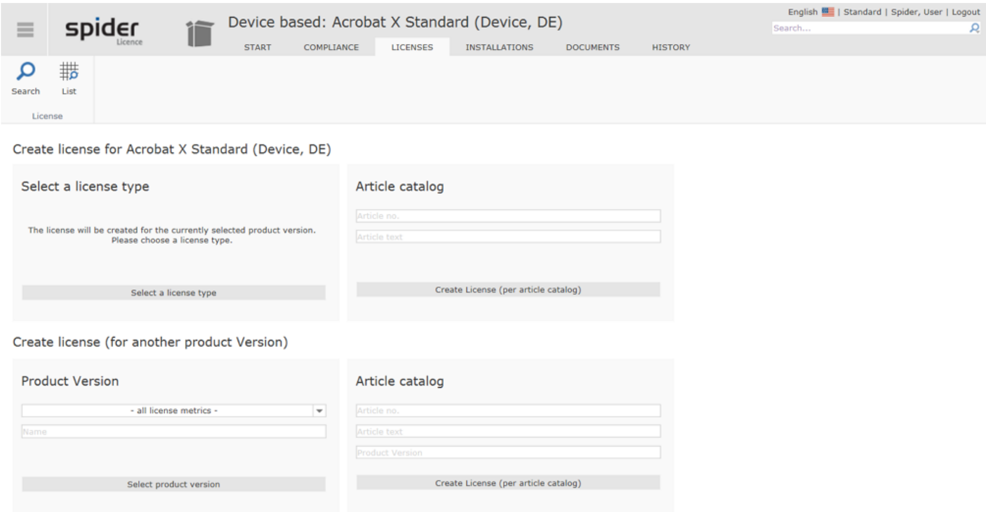
Use the license list to search for and edit the licenses of the product version.

➢ The license list is available by opening the **Licenses** ribbon of the product version.



You have also the option to create new licenses manually or via the article catalog.

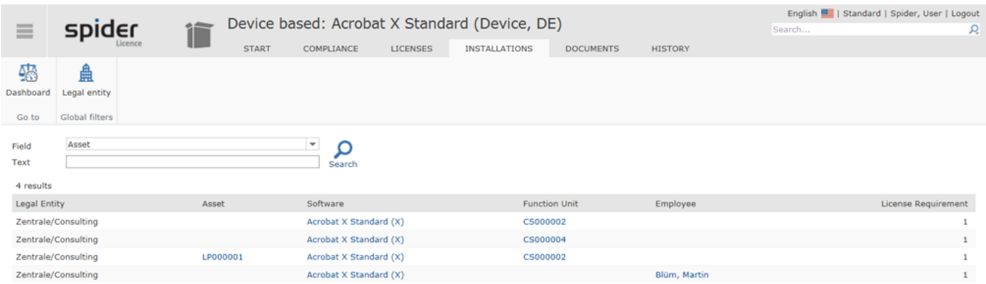
➢ Click on the **New** button in the ribbon group *License*.



Further information regarding the creation of **Licenses** (see "**Create licenses**" on page 158).

3.7.5 Installations ribbon

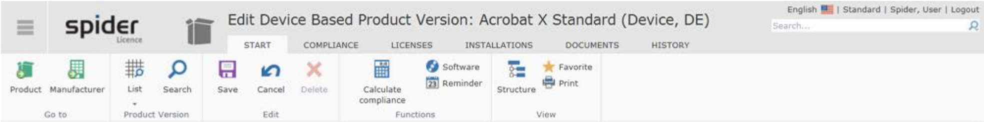
By going to the **Installations** ribbon, you can view all *assets, function units and employees* which are assigned to this product version.



Use the links to navigate to the corresponding objects in Spider Asset.

➢ By clicking on the **Dashboard** ribbon button, you will go to the **Compliance dashboard** (on page 29).

3.7.6 Navigation



The ribbon offers you the following navigation options:

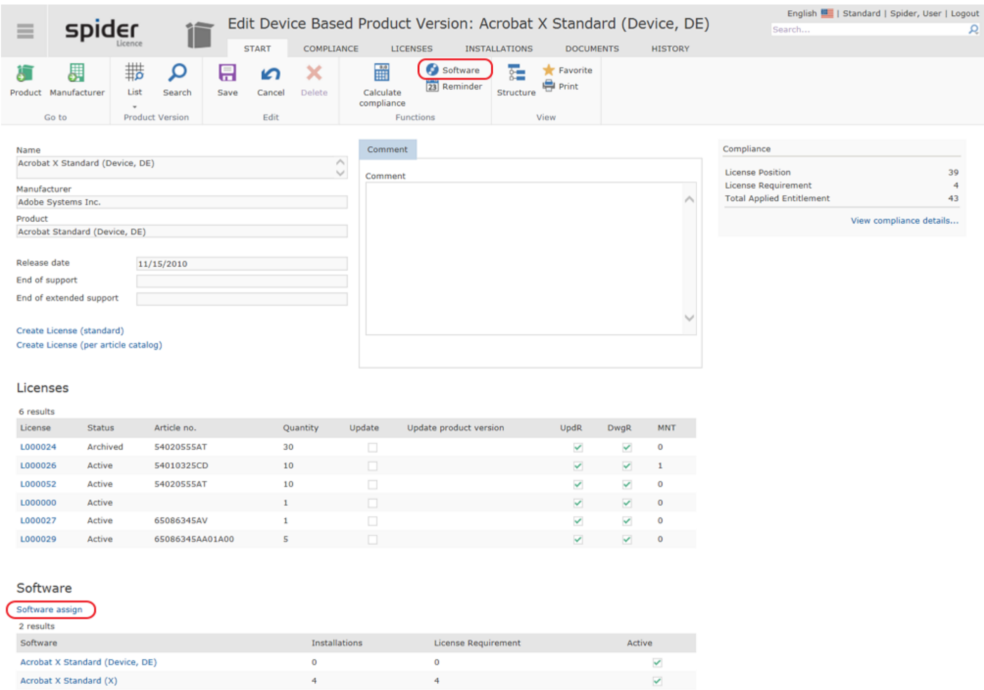
Ribbon group	Ribbon button	Function
Go to	Product	Navigates directly to the superior product.
	Manufacturer	Navigates to the manufacturer of the product version.
Product version	List	Opens by default the list of product versions for the corresponding product. Alternatively, you can open the product version list of the manufacturer by expanding the selection list and selecting manufacturer.
	Search	Navigates to the search across all product versions.
View	Structure	You can open the product structure view directly from the product version. Click on Structure in the View ribbon group. The structure view shows all objects of the product (product versions, licenses, license allocations) and allows for a quick navigation.

3.7.7 Software product version assignments

Software versions are assigned within a product version. These assignments refer to the technical software versions, i.e., the installed and used software.

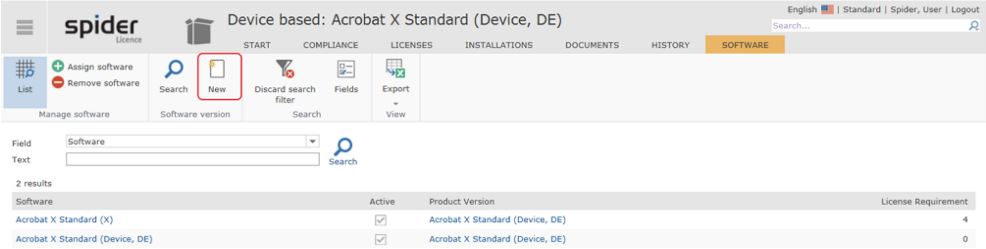
Each installation is counted depending on the license metric. The calculated license requirement of the assigned software is specified in the product version. The assignment of a software to the product version establishes the connection to the asset management. For more information about software management please refer to the Spider Asset Master data.

To create a new assignment between product version and software, the software must already be entered and thus be available in the master data of Spider Asset.

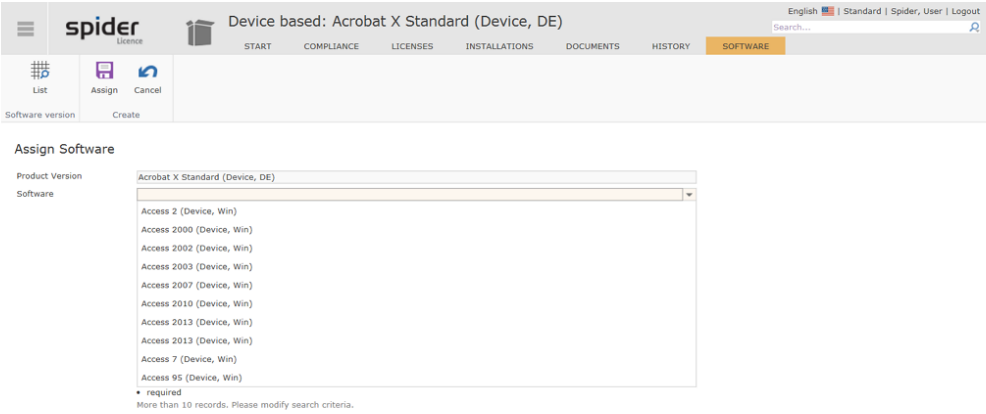


➢ You can make an **individual assignment** by going to the **Software** button in the ribbon-group *Functions.*

Alternatively, you can make an **individual assignment** by selecting the link **Software assign**.

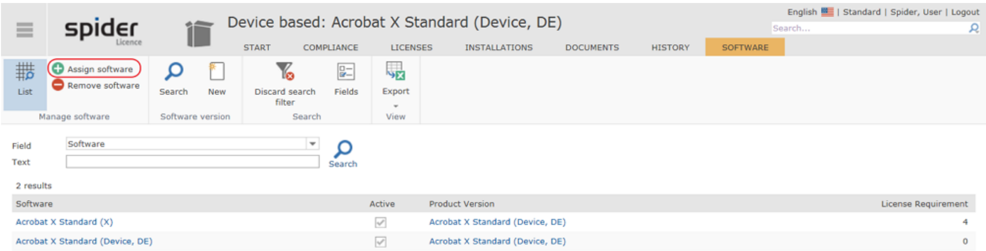


To create **individual assignment,** click in the ribbon-group *Software version* on the **New** button.

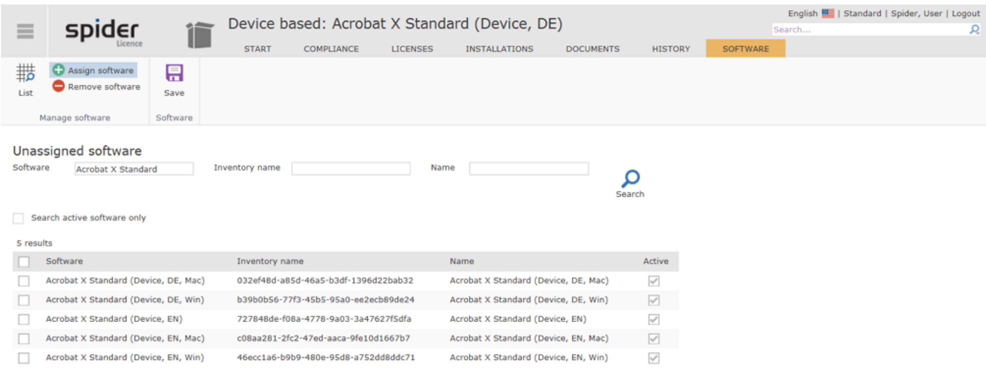


➢ Select the corresponding software from the dropdown field and click on **Assign**.

It is also possible to execute **multiple assignments** by clicking on the button **Assign software** in the ribbon group *Manage software*.



All software products are listed which are not assigned, yet.



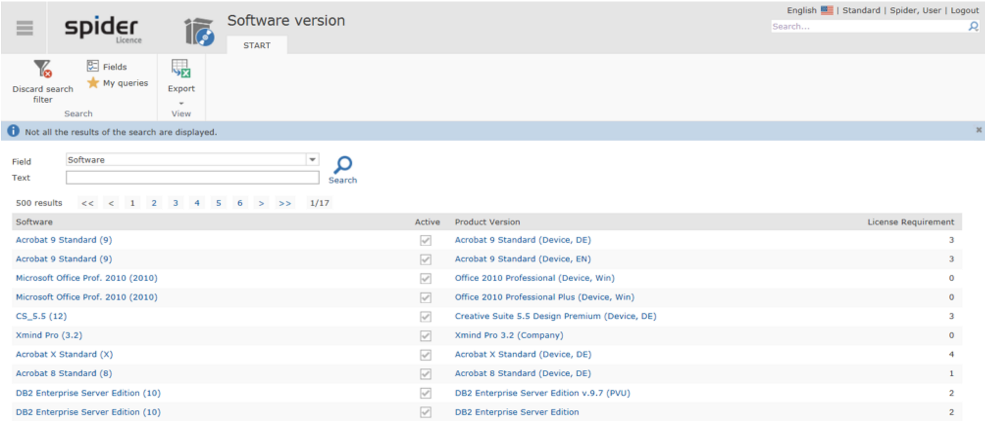
➢ Select the matching software for your product version by activating the corresponding check box and click on the ribbon button **Save**.

Note	To remove software assignments, click on the ribbon-button **Remove software.**

Edit and assign software versions

➢ In order get an overview of the assigned software, click on the menu item **Product version / Software** in the menu of the Spider home page or in the **Backstage** (on page 35).

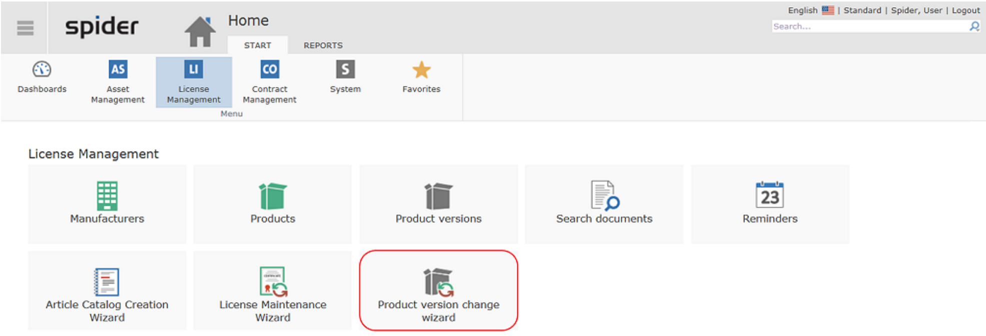
The list shows installed and assigned software.



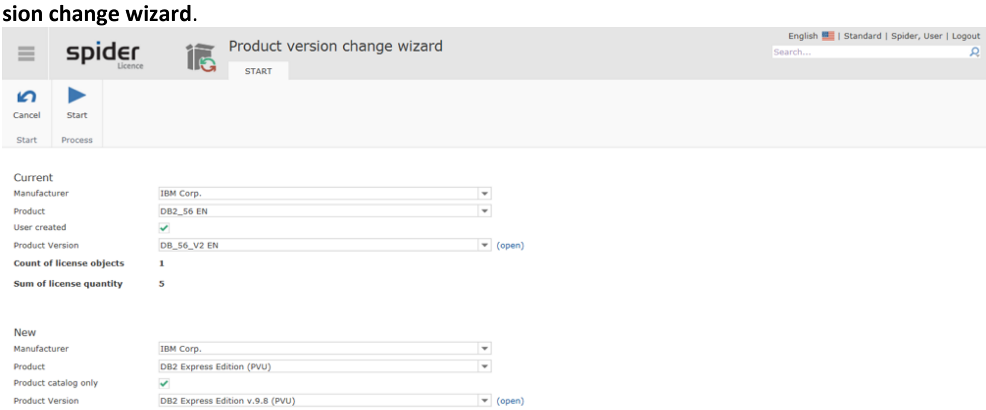
From the overview, the assignment as well as the license requirement can be seen. You can also navigate through the columns software and product version directly to the linked objects.

3.7.8 Product version change wizard

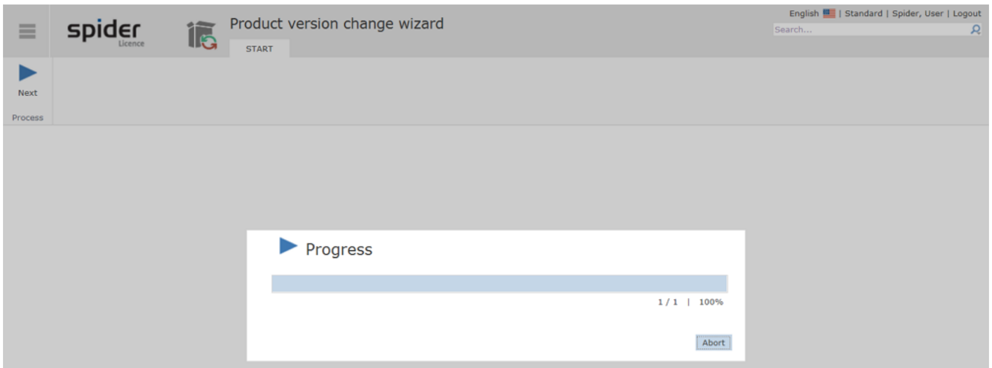
Use the product version change wizard to update product versions.
For example, if a product version, which previously has not been available in the product catalog and has therefore been entered manually, shall now be updated to the product version from the catalog. This will update the existent licenses and software assignments to the new product and version objects.



In the following example, the IBM product DB2 Enterprise Server Edition had been entered manually and shall now be updated to the correct version from the product catalog by using the **Product version change wizard**.



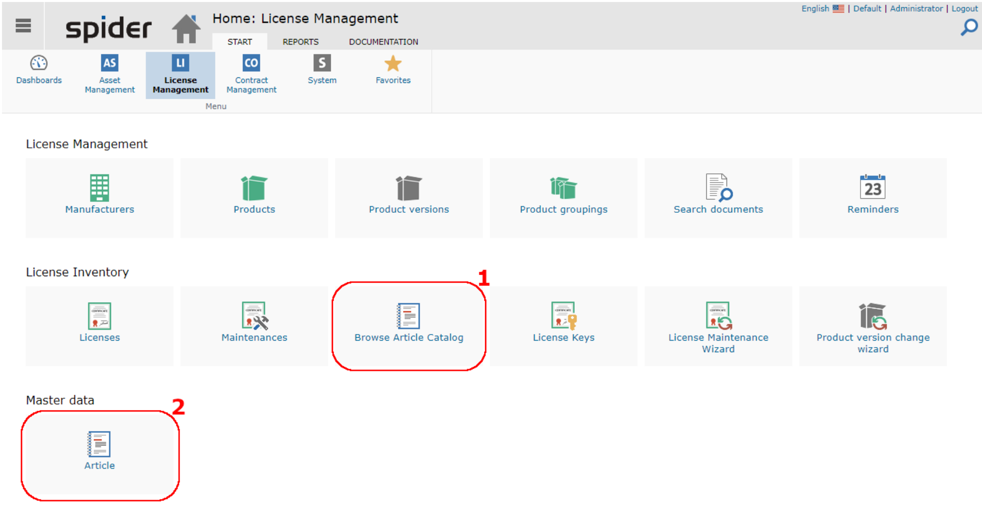
After starting the process, a progress message is shown.



The result report informs about possible errors or like in this example, about the successful completion.

3.8 Article

The article catalog is constantly maintained and expanded. Nevertheless, it may happen that articles are missing, or the article used differs from the one in the article catalog.



The **Browse Article Catalog** (1) tile leads to the search page to search for articles supplied. The specification of the article manufacturer is required.

The **Article** object (2) can be used to add your own article definitions to the article catalog. These articles can then be linked to licenses or maintenance.

Note Articles marked as preferred are prioritized over other articles with the same article number during license creation.

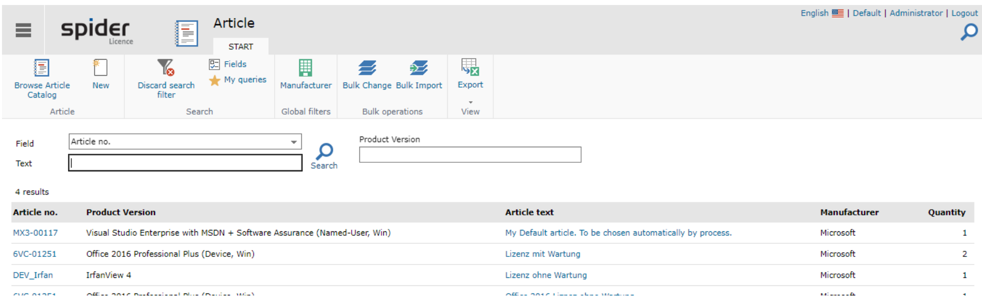
Note You can suggest the article for inclusion in the article catalog using the corresponding field.

3.8.1 Article search

- On the Spider License start page, select the **Articles** (2) menu item in the Master data menu area or in **Backstage** (on page 35).

The search lists all the articles you have created. The search supports mass editing of records, export, a global manufacturer filter and standard search functions. Two search criteria are possible, one of which must be the Product version.

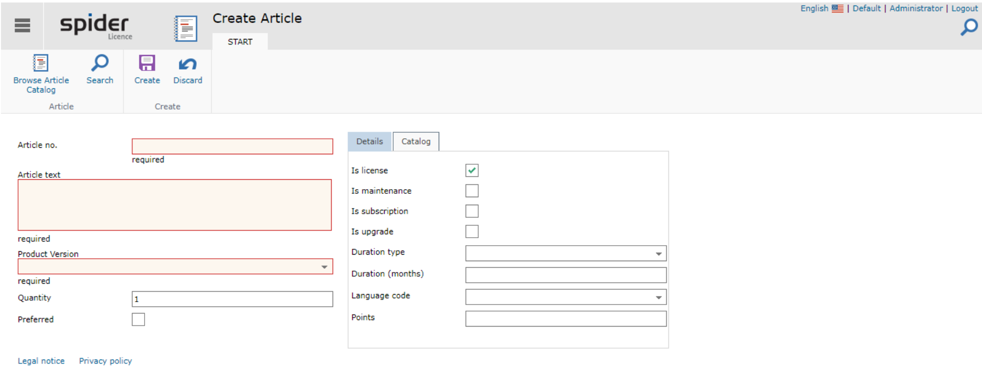
In addition, it is possible to switch directly from this search page to the search page of the standard article catalog.



3.8.2 Create user defined Article

- Click on the **New** button in the article search or in the Edit form of an article to create a new article.

The form for entering the article data opens. Complete the corresponding fields and click on the Create button to save your entries.

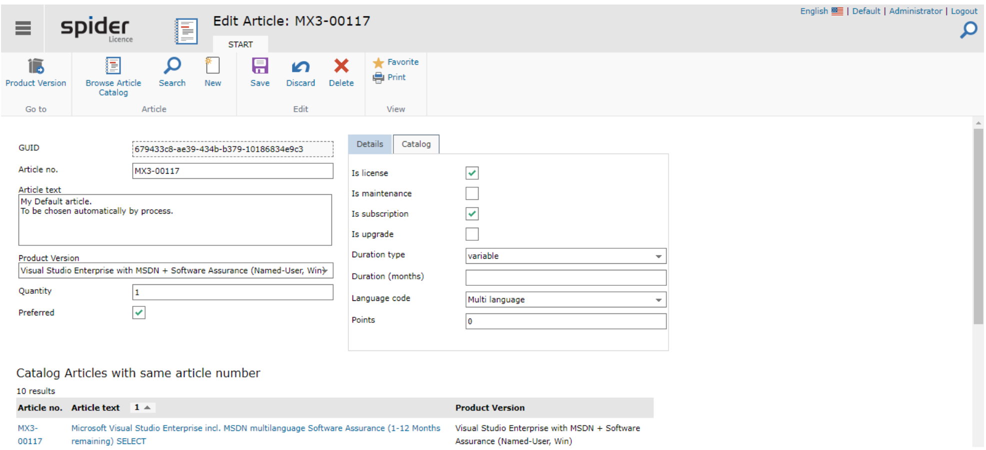


The data fields that must be filled in are marked as mandatory fields.

Field	Description
Quantity	Defines whether the article covers multiple installations.
Preferred	If true, this article is preferred over others with the same number. For details, see “Deriving user defined Articles from the Article Catalog” on page 213.
Is license	If true, using this Article will lead to the creation of a License object.
Is maintenance	If true, using this Article will lead to the creation of a Maintenance object.
Is subscription	If true, using this Article will lead to the creation of a Subscription License object.
Is upgrade	If true, a resulting License object will need an upgradable base license.

3.8.3 Edit user defined Article

- Click on an **Article no.** from the Article search.



- After changing the data, click the **Save** ribbon button to save your entries.

Several optional grids on this page may show additional Information here. They appear when relevant data needs to be displayed.

Grid	Description
Catalog Article with same article number	This grid is visible, if catalog Articles exist, that share the same Article number. This is usually the case if the article is derived from a catalog Article. For details, see "Deriving user defined Articles from the Article Catalog" on page 213.
Articles with same article number	If this article is not unique, check the preferred option and that the Article is not a duplicate.
Catalog Article for the same Product Version	Displays alternative Articles for the same Product Version.
Articles for the same Product Version	If multiple articles refer the same Product Version check for redundancies.
Licenses connected to this article	Is visible when the article is used.

3.8.4 Preferred articles with the same SKU

An article can be set as preferred. SKU numbers do not have to be unique. For example, the same SKU numbers can be used for different license programs. Some manufacturers use the same SKU numbers for the current product version. Over time, the same SKU number might be used for different product versions.

This leads to the problem with SKU-based import that a unique article cannot be identified and thus must be manually reentered, which is very time-consuming.

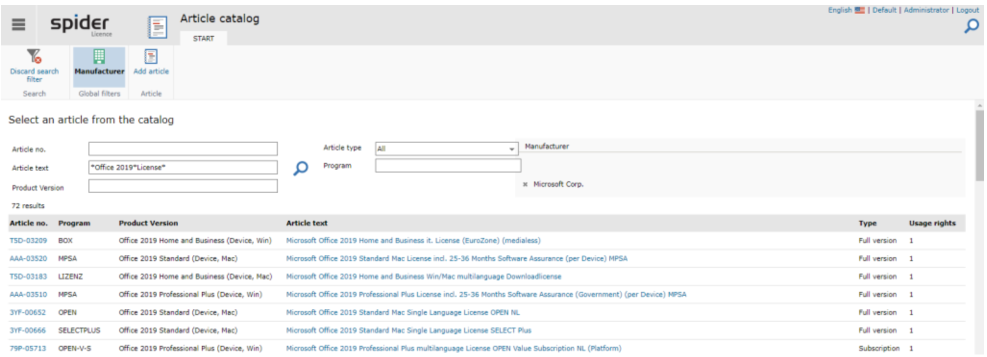
The preferred article function makes it possible to create a preferred article for frequently used SKU numbers, which is then always used during the import. SKU numbers and article information can be retrieved from the article catalog and used as a template.

3.8.5 Deriving user defined Articles from the Article Catalog

In addition to the normal creation of an article, it is possible to derive an article from an existing article. Articles from the article catalog can also be used for this purpose.

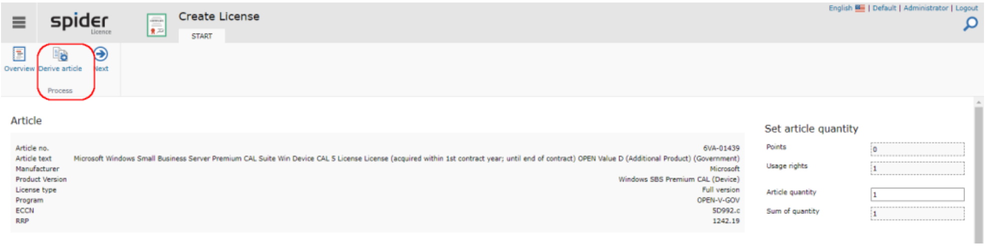
Note	This function is advantageous if preferred articles are to be set. A preferred article is used in the SKU-based license import if an SKU occurs more than once. Thus, the preferred or favored article is set for a SKU.

➢ On the Spider License start page, select the **Browse Article Catalog** (1) menu item in the License Inventory menu area or in "**Backstage**" (on page 35).

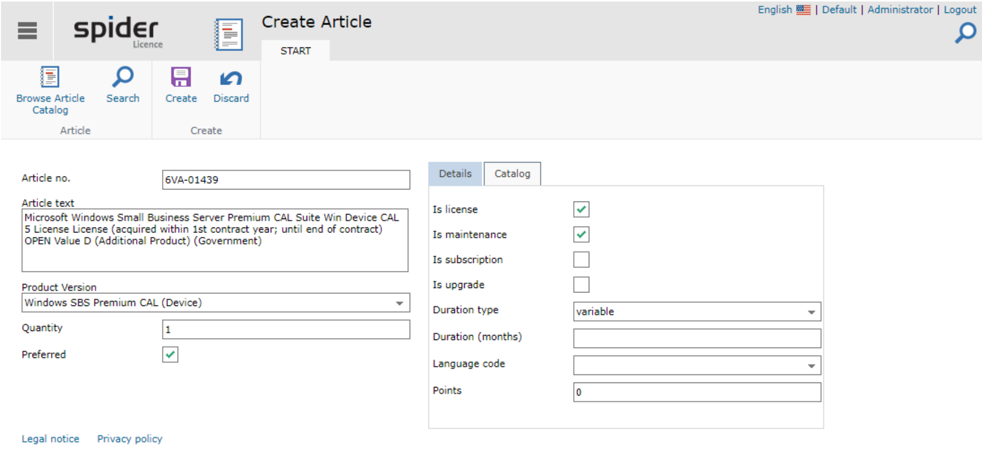


➢ From the Article Catalog search page choose the desired Article by clicking on its article number.

Note	Since this is the normal approach to create licenses based on the selected SKU, Spider automatically directs you to the Create License page.



➢ Click on **Derive article**.



The form for adjusting the article data opens. Complete or change the corresponding fields and click on the **Create** button to save your entries.

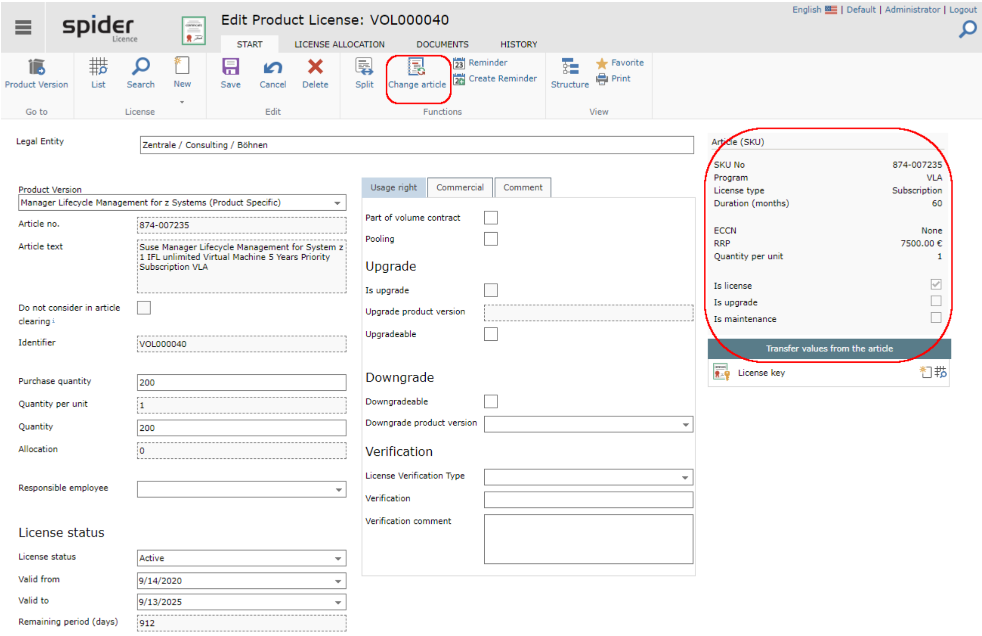
Most fields are pre-filled from the article but are modifiable.

Attention	If the Catalog Article changes, due to Spider Updates or to changes initialized by the manufacturer, the derived Article does not change! Licenses that use what is believed to be the same Article than the derivative Article will also not be updated until the derivative article has adopted the changes.

3.8.6 Functions on the License/Maintenance object

Licenses that were created via the article catalog or an SKU (see chapter Create license with SKU number from article catalog on page 159) are coupled with this article.

Linked Licenses or Maintenances can also be recognized by the fact that the Article no. field is not writable and additional information is displayed in a tile on the edit page:



Change article

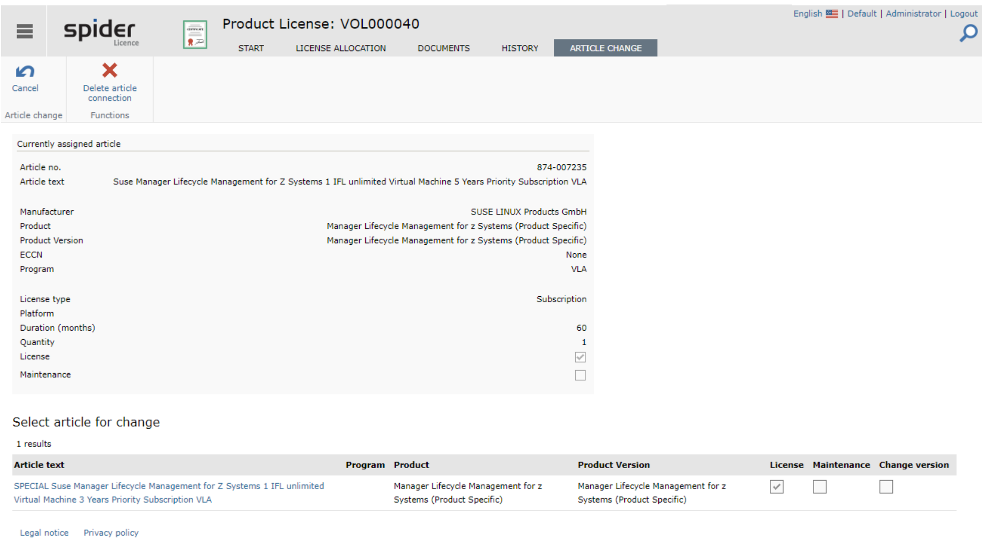
It may be useful for coupled licenses to switch to another article. Only one article with the same article number can be selected in the first step.

➢ Click on the Change article button.

The key data of the previously coupled article are displayed in a large tile. Below it there is a grid with possible other articles. If this grid is not available, there is no matching article with the same SKU on the system.

To switch to a different article, this license must first be decoupled. See one of the following chapters "Delete article connection" on page 215.

To create your own article from an article in the catalog, proceed as described in chapter "Deriving user defined Articles from the Article Catalog" on page 213.



➢ Click on the article text of the article you want to assign.

Delete article connection

Before a license can be linked to an article of a different SKU, an existing article binding must be broken.

- In the license edit page, click the **Change article** button.

In the ribbon menu, in the *Functions* section, you will find the **Delete article connection** button.

- Now click on the **Save change** button to break the binding or on **Previous** to return to the article change page.

Back on the license edit page, the tile with the article information is now missing. Also, key fields such as the product version, article number, and article text are now changeable.

Linking a license to an article

To link a License to an article, the License must already have a valid article number. To link an existing License to a SKU, enter the SKU in the Article no. field. Only then the Change article button in the menu becomes active. If no tile with information about the SKU appears on the edit page or the article no. can be changed, the license is **not** linked/connected.

Note	If an SKU is entered but the Change article function is still not available, check whether the SKU used is valid for this object type: A license cannot be linked to a maintenance article.

- Click the **Change article** button on the license edit page.

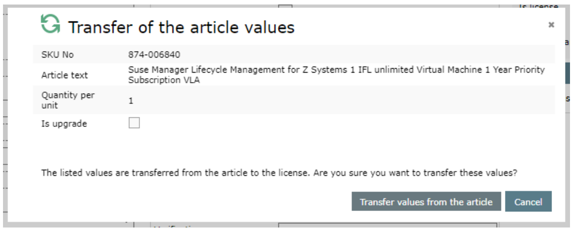
Select the desired article and confirm the action with Save change. The license is now linked.

Transfer values from the article

A linked License can be easily updated in case of changes to the article.

- Click the **Transfer values from the article** button below the linked SKU information tile.

A dialog will appear showing the new values:



- **Cancel** closes the dialog without changes, **Transfer values from the article** updates the fields in the license.

Subscription licenses

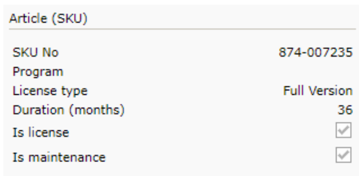
Subscription licenses can only be created in Spider via an article with the subscription property. These do not require maintenance but must have a start and end date.

When the subscription expires, the licenses no longer contribute to the compliance calculation.

Attention	Since there are different regulations from the individual manufacturers on how to proceed with expired subscriptions and what they then cover or do not cover, this must be checked by the license manager in each individual case.

Articles with *Is license* and *Is maintenance* property

Maintenances that are linked to an article which include a license as well (feature *Is license*) will be dependent on the belonging License object. Therefore, some fields like **Quantity**, **Legal Entity, Article no.**, etc. can be changed on the edit page of the License only. If you want to change the article for such a Maintenance, you are forced to change the article at the License object.



Attention	Changing the article to an article without Maintenance at the License object leads to the removal of the dependent Maintenance object. It will be disassociated from the License and deleted.

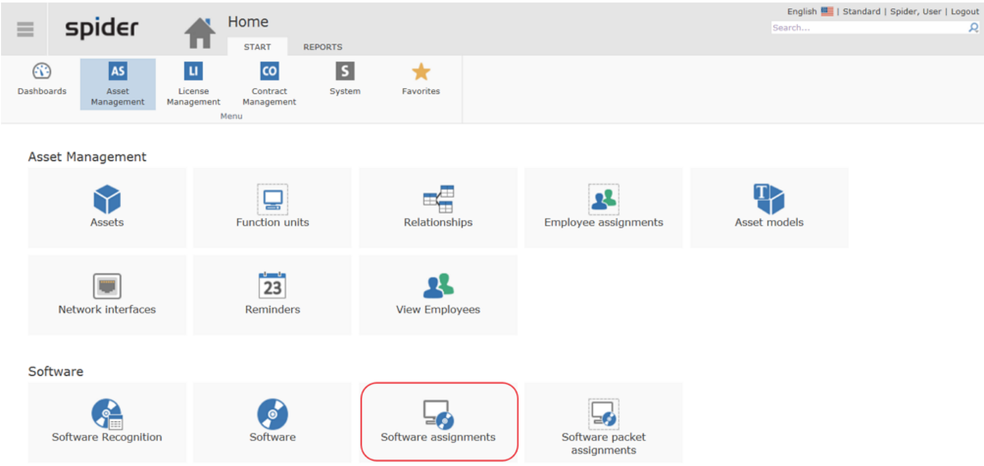
3.9 Software inventory

The software inventory is managed in Spider Asset. Depending on the usage purpose and the product configuration, the software assignment is carried out on the asset, on the employee or on the function unit. The software inventory includes the installations or the usage of the software which is used as a basis to calculate the license requirement.

3.9.1 License-relevant data

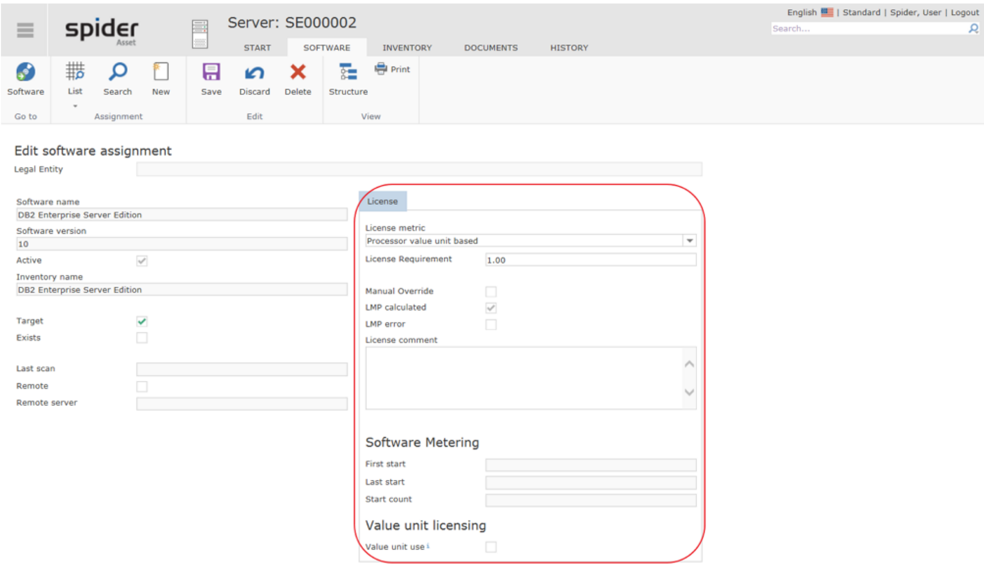
The **Software assignment** in Spider Asset contains several data regarding the license requirement. Please find below a more detailed explanation.

➢ To get to the *Edit software assignment* form, go in the *Edit form* of the asset, employee or function unit to the **Software** ribbon and select the corresponding **Software assignment**.



This form can also be opened via the Spider Asset homepage or the **Backstage** (on page 35).

➢ Click on the menu item **Software assignment** and select the corresponding assignment.



Display	Meaning
License metric	License metric of the software used for the calculation. By default, **DEVICE BASED** is selected. Due to the metric calculations, also the metric assignment is set automatically.

Display	Meaning
License requirement	License requirement of the software assignment. This value can be entered manually or by metric calculations.
Manual handling	If enabled, all data must be maintained manually. The data record is not considered for metric calculations which have set the license requirement. Application case: Manual editing and setting of the license data.
LMP calculated	Will be set as soon as the value is available by means of a metric calculation (LMP = license metric procedure).
LMP error	An error has been returned by an LMP A calculation for this software assignment is not possible.
License comment	Supplementary notice or explanation. In case of an error in an LMP calculation an error message will be saved.
Software Metering	These fields are supplied by the *software recognition*, respectively by the *inventory system*.

3.10 Product groupings

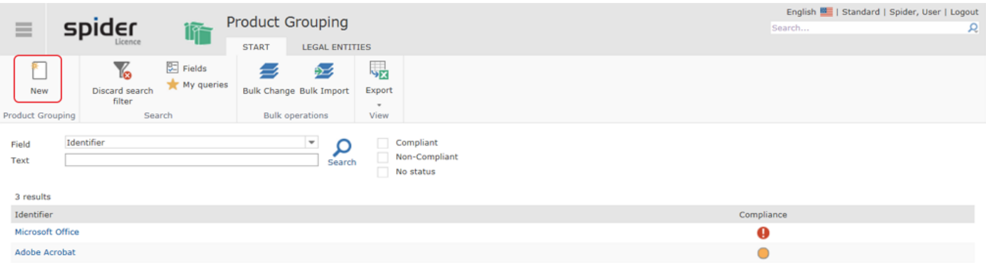
Several products, which shall be subject to a common evaluation, may be combined to a product grouping. The products can have different license metrics. These product groupings are required for reporting and offer a better overview.

For example, you can use the product grouping "Microsoft Office" to show all license coverages of the Microsoft Office products, i.e., all different editions.

Alternatively, you can use a product grouping to view all products of one application range (such as client software, graphics software, etc.).

3.10.1 Create product groupings

- To edit a product grouping, go to the Spider Licence home page and click, either in the menu or in the **Backstage** (on page 35), on the menu item **Product grouping**.



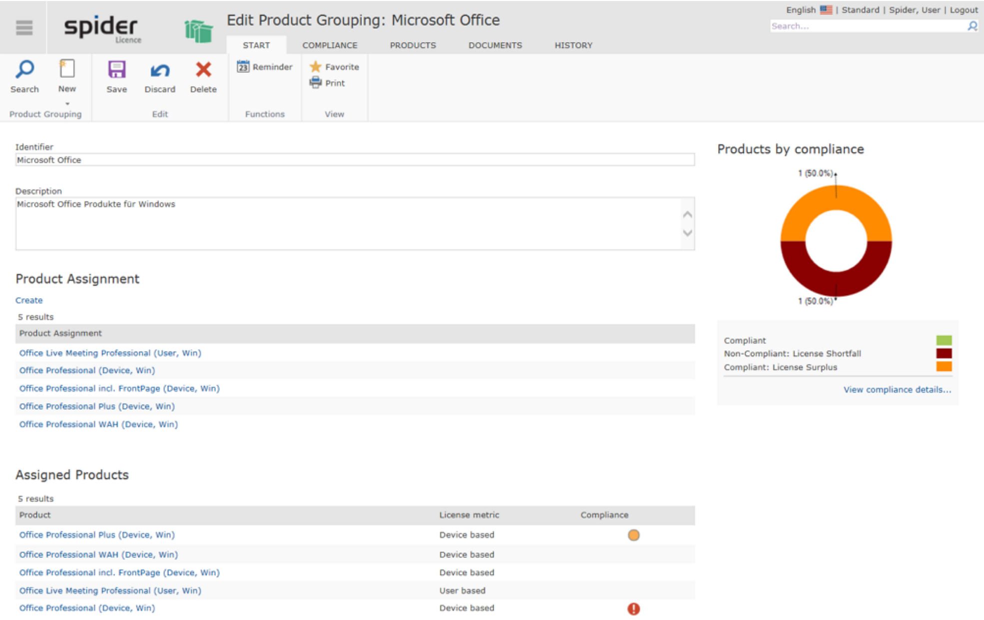
- Then, click on the **New** ribbon button to go to the Create form.

- The data fields which must be filled in are marked as mandatory fields. To save the data, click on the **Create** ribbon button.

3.10.2 Edit product groupings

- To edit a product grouping, click on the menu item **Product groupings** in the menu of the Spider Licence home page or in the **Backstage** (on page 35).
- Use the **Field search** to search for a product grouping or restrict the display of results.
- Then edit the product grouping by clicking on its **Identifier**.

The assigned products and their license coverage are listed in the Edit form of the product grouping.



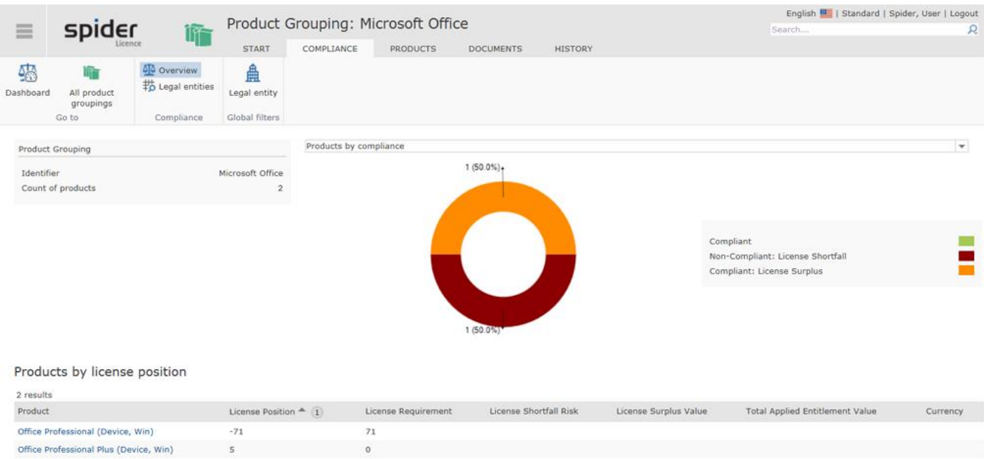
Note	Each time you open the form *Edit product grouping*, the current compliance degree will be re-calculated and displayed.

For a more detailed evaluation go to the ribbon **Compliance** or click on the Link **View Compliance details...**.

- After editing the data, click on the **Save** ribbon button to save your entered data.

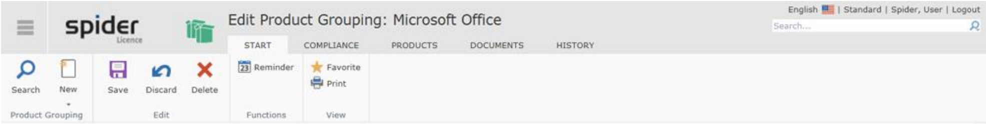
3.10.3 Compliance ribbon

Go to the **Compliance** ribbon to view the **Compliance overview** (see "**Product grouping compliance**" on page 232).



- By clicking on the **Dashboard** ribbon button, you will go to the **Compliance dashboard** (see "**Product grouping compliance**" on page 232).

3.10.4 Navigation



The ribbon offers you the following navigation options:

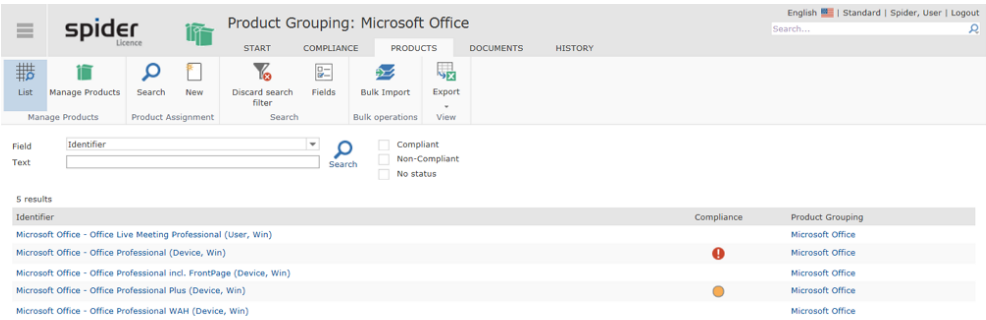
Ribbon group	Ribbon button	Function
Product grouping	Search	Navigates to the search across all product groupings.

3.10.5 Manage product assignments

By means of the **Product assignment** you can assign products to a product grouping. Please find below a more detailed explanation of this function.

The Products ribbon

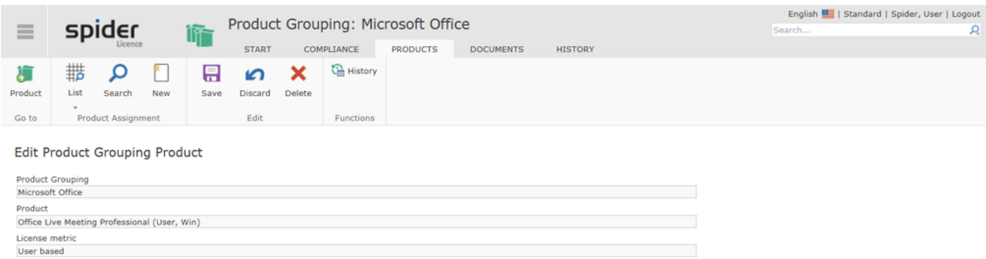
➢ By navigating to the **Products** ribbon you can see a list of all products which are assigned to this group.



Note	Use the **Field search** to search for a product assignment or restrict the display of results. Furthermore, you can restrict the search by setting compliance levels: **All**, **Complied** or **Not complied**.

Delete product assignments

➢ In the product list, click on the **Identifier** of the product assignment to be edited.



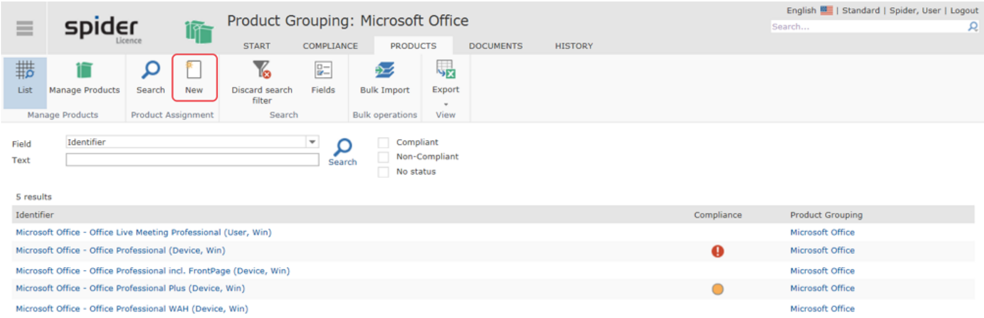
➢ Use **Delete** to cancel the assignment.

Assign products individually

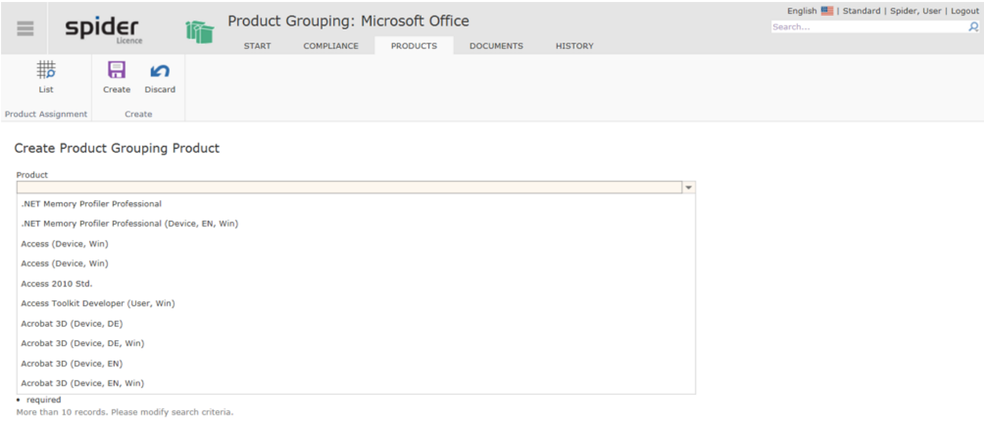
Proceed as follows for the individual assignment:

You are in the Edit form of a product grouping.

➢ Go to the Products ribbon and click on the **New** ribbon button.



The Create form for product assignments will open.



➢ Select the product which is to be added to the product grouping and click on **Create**.

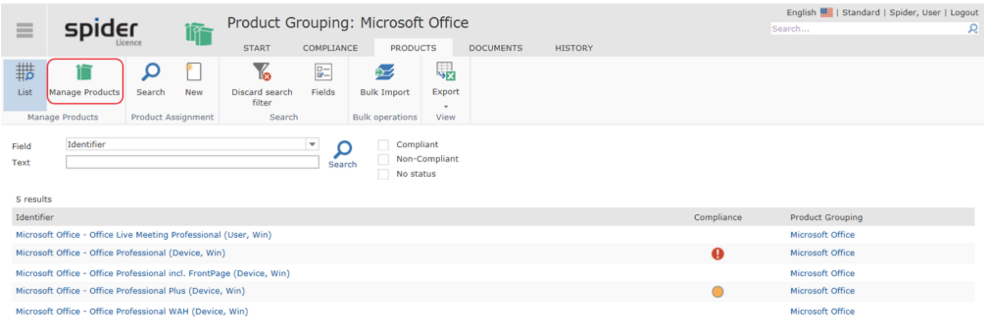
Create or modify multiple product assignments

There is a special function for the assignment or modification of multiple product assignments.

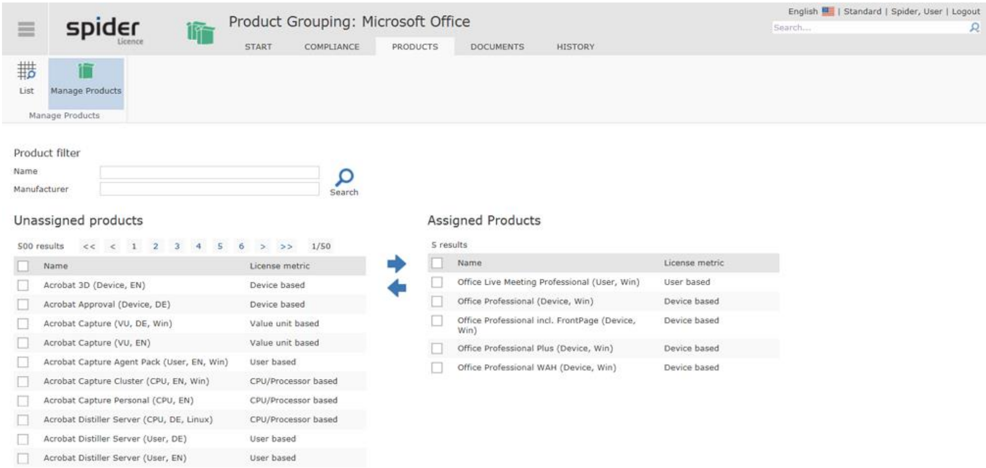
➢ You are in the Edit form of a product grouping for which you want to modify the product assignments.

➢ Select the **Products** ribbon. The product list will be opened.

➢ In the **Manage Products** ribbon group, click on the **Manage Products** button.



Use the following form to conveniently assign or delete products. The left area contains products which are not assigned. On the right, the already assigned products are shown.



Use name and manufacturer to filter the products you want to assign.

- By activating the **checkbox,** you can select one or more products which will either be assigned or the assignment of which will be deleted.
- Click on the **green arrow** to move the selected products in the desired direction.

3.11 Compliance evaluations

The compliance evaluations are available for manufacturer, product, product versions and product groupings and always refer to the legal entities, for which the registered user is authorized. The compliance evaluations for manufacturers, products and product groupings represent aggregation levels of the results of the product versions.

- The manufacturer compliance summarizes the license positions of the products of a manufacturer.
- The product compliance summarizes the license positions of the product versions of a product.
- The product grouping compliance considers all product versions of the products combined in the product grouping.

As mentioned in the beginning, the compliance evaluations are based on complex and multi-stage calculations. The existing active and valid licenses are used to meet the license requirements. Licenses with downgrade rights can be used for several product versions within a legal entity. Pooling rights enable you to also use licenses of affiliated legal entities. The resulting license positions are calculated per product version and legal entity and made available for cross-system evaluations.

Note Compliance calculations are based on several successive license positions.

The following overview explains the term compliance and the individual license positions:

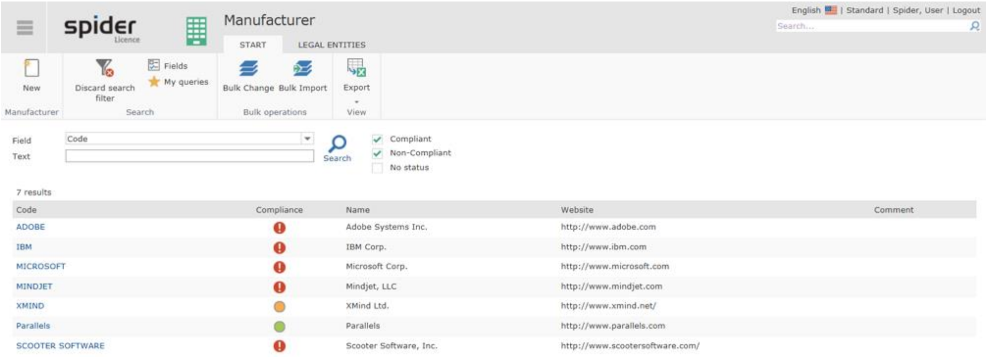
Term	Meaning
License entitlement	Number of available, valid licenses.
License requirement	The license requirement corresponds to the number of required licenses, depending on the number of installations as well as the license metric.
Simple license position	In the simple license position, the required licenses and the usage are compared per legal entity and product version. The simple license position states whether sufficient licenses are available for a product version to meet the requirements within a legal entity. In case of a positive value, licenses are still available. In case of a negative value, there are not enough licenses available for the product version within the legal entity. This license shortfall can be positioned by using the downgrade license position or the pooling license position. Thus, the results of the simple license position are to be understood as intermediate results.
Downgrade license position	The downgrade license position is based on the simple license position. Within a legal entity, licenses with downgrade rights can be allocated to older product versions. The aim is to position existing negative simple license positions against licenses of higher product versions. Only the licenses of one legal entity are considered and only so many downgrade licenses are allocated as required for covering the negative license position. The downgrade allocation is done following the version sequence, starting with the oldest version. In case of a negative value, there are not enough licenses in a legal entity to cover the license requirement. This license shortfall can be positioned by using the pooling license position. If there are no pooling licenses left, you already deal with a license shortfall.
Pooling license position	The pooling license position is based on the downgrade license position. Available licenses with pooling rights are allocated to subordinated, affiliated legal entities to compensate for license shortfalls in the downgrade license position. The distribution to connected legal entities is done top-down. Only so many licenses are allocated as required for the coverage.

	If there are not enough licenses to cover the license requirement of more than one legal entity, the available licenses are allocated to the legal entities. In case of a negative value, there are not enough licenses available in a legal entity to cover the license requirement, even after considering a pooling license allocation from superior legal entities. This is called a license shortfall.
Compliance	The compliance summarizes the simple, downgrade and pooling positions of the affiliated legal entities. If all pooling coverages of the affiliated legal entities are fulfilled, the compliance will be met (green), otherwise it will be indicated in red.
Schematic view	For a simple and quick interpretation of the data, the coverage status is indicated by the following traffic light icons.
	Compliant
	Not compliant / license shortfall
	License surplus

You can navigate to the compliance evaluation either via **Manufacturer**, **Product**, **Product version** or **Product grouping** compliance. All four categories represent different aggregation levels of the compliance evaluation.

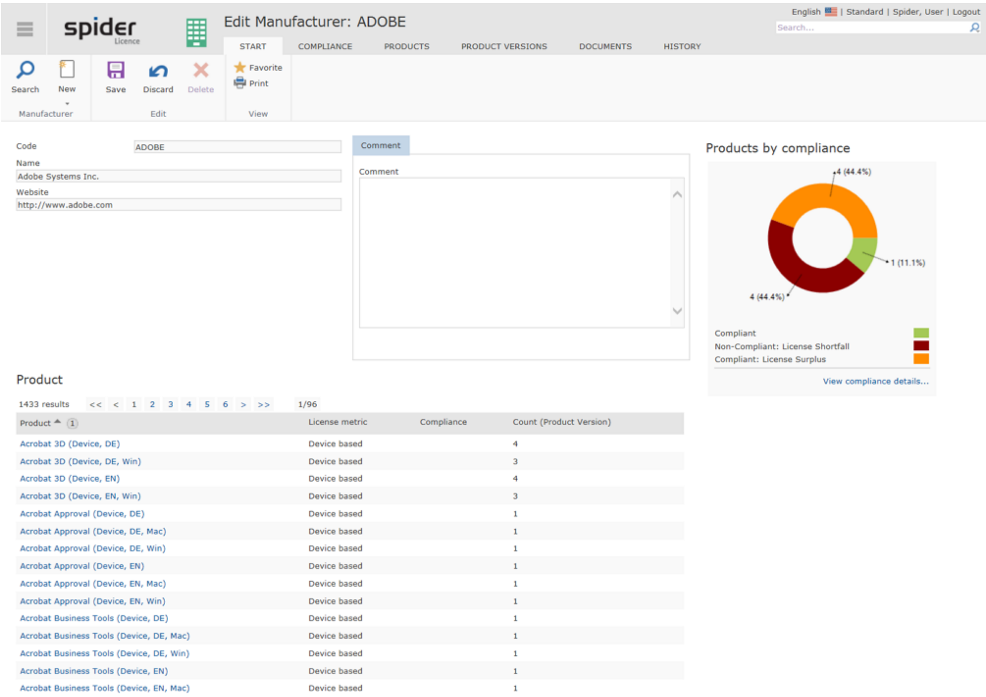
3.11.1 Manufacturer compliance

➢ To open the **Manufacturer compliance**, go to the Spider home page and click on the menu item **Manufacturer** either in the menu or in the **Backstage** (on page 35).



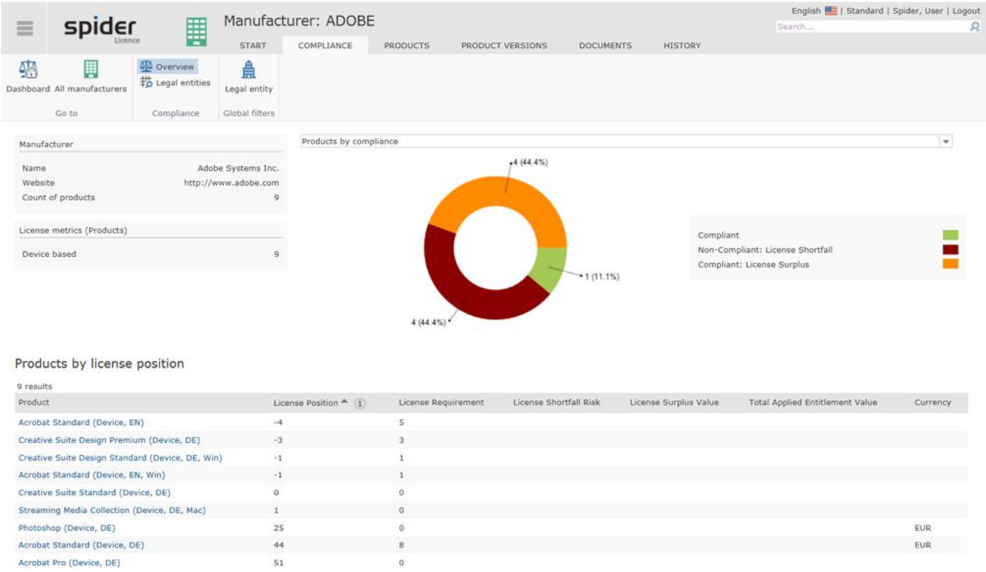
Use the field search or the compliance check boxes to restrict the search. In this example, both check boxes were ticked so that only compliance-relevant manufacturers are listed.

➢ In the **Code** column, click on the manufacturer, the compliance evaluation of which you are interested in or go to the **Compliance** ribbon to see an overview of the compliance per legal entity and manufacturer.



The diagram shows, how many products of this manufacturer are *compliant* or have *license shortfall* or *license surplus*.

➢ Click on the link beneath the diagram or go to the **Compliance** ribbon.



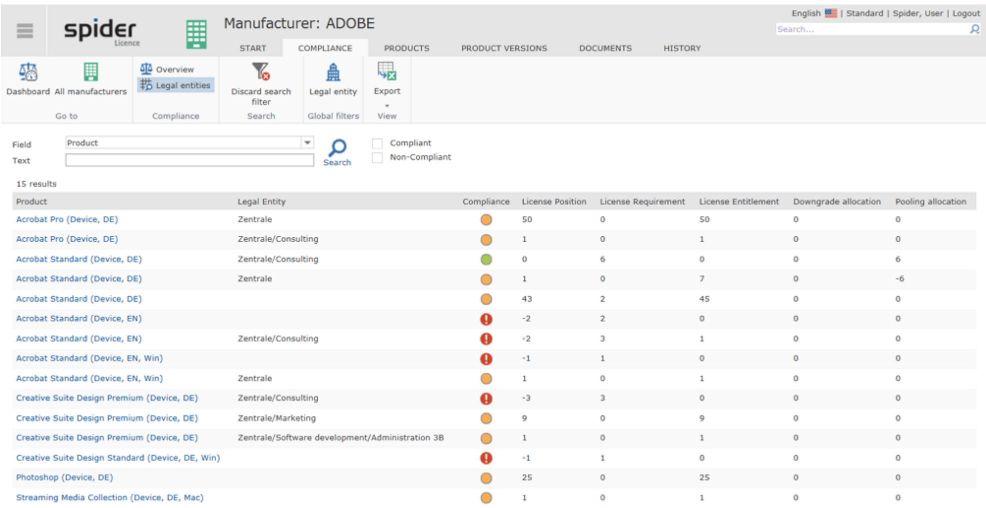
The used products of this manufacturer are listed according to their license position.

Note If, in addition to the licenses, also prices have been stored, the total cost as well as the value of a possible license surplus will be indicated.

Use the dropdown field to view the following diagrams:

Dropdown field	What does the diagram show?
Product by compliance	Number of used products of this manufacturer and their compliance degree.
Compliance by legal entities	Number of affected legal entities and their compliance degree.
Top 10 Products by installa-tions	The 10 most frequently installed products of this manufacturer.
Progress of compliance	This diagram shows the compliance degree of all products of manu-facturer over the last 6 months.

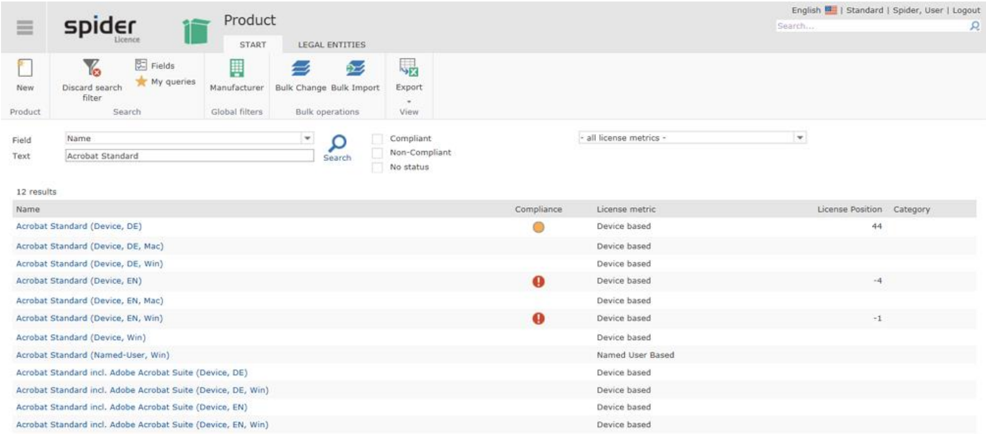
➢ Click on the **Legal entities** button in the *Compliance* ribbon group if you want to see the license position per product and legal entity in more detail.



To navigate to a product or a product version, go to the corresponding ribbon in the ribbon bar and select the desired **Product** in the left column.

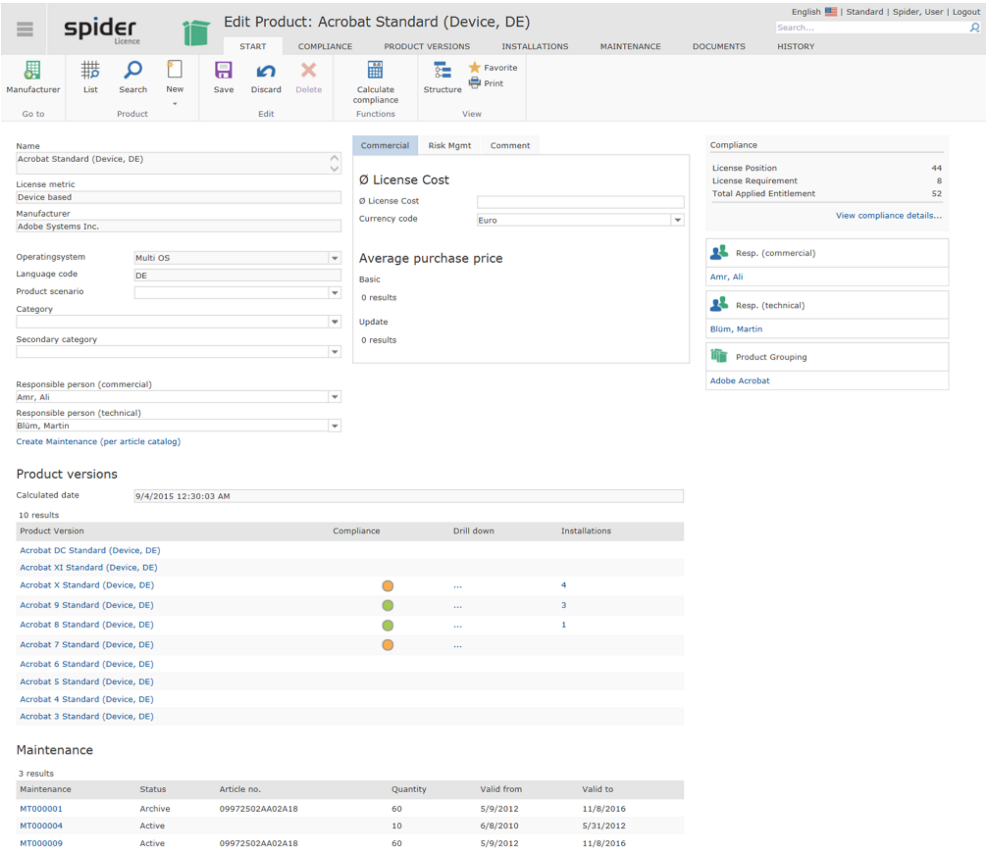
3.11.2 Product compliance

- To open the **Product compliance**, click on the menu item **Product** in the menu of the Spider Licence home page or in the **Backstage** (on page 35).

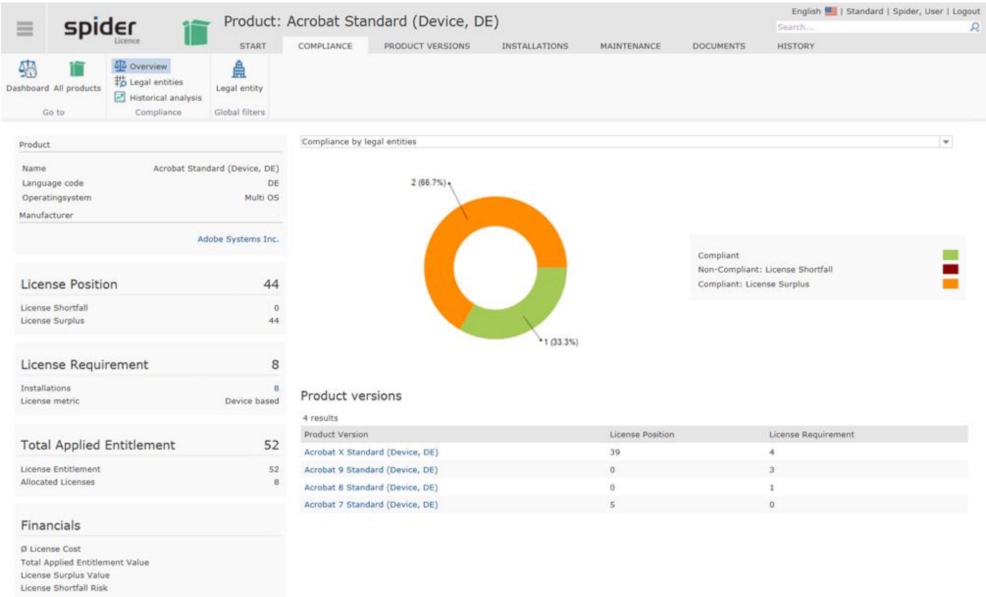


Use the field search or the compliance check boxes to the restrict the search.

- In the **Name** column, click on the product the compliance of which you are interested in. For example, on Windows Enterprise (Device, Win).



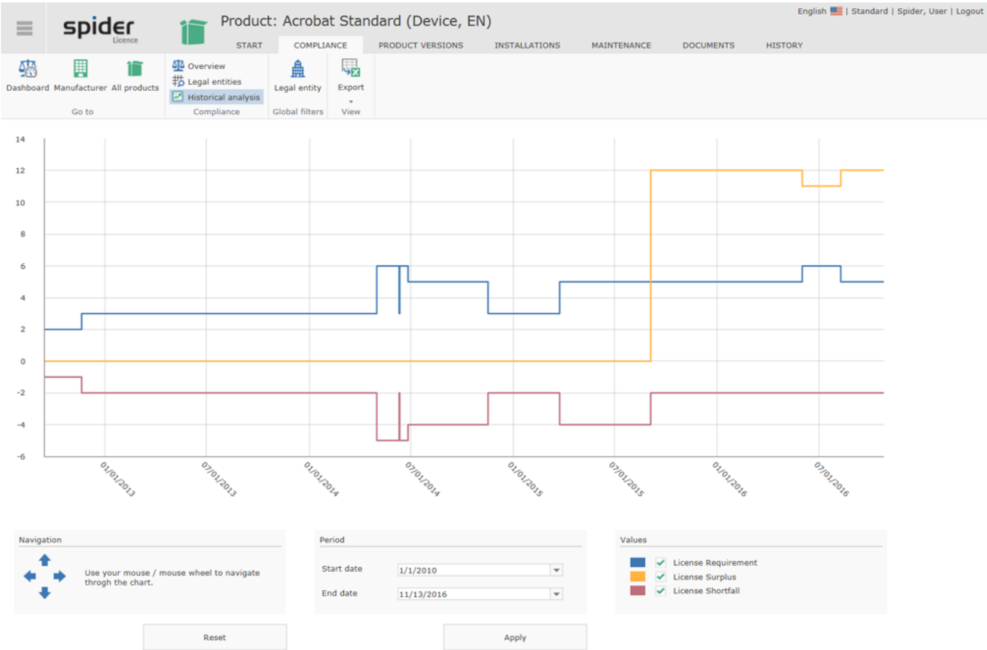
➢ In the compliance overview, click on the **View compliance details ...** link or navigate to the **Compliance** ribbon.



Use the dropdown field to view the following diagrams:

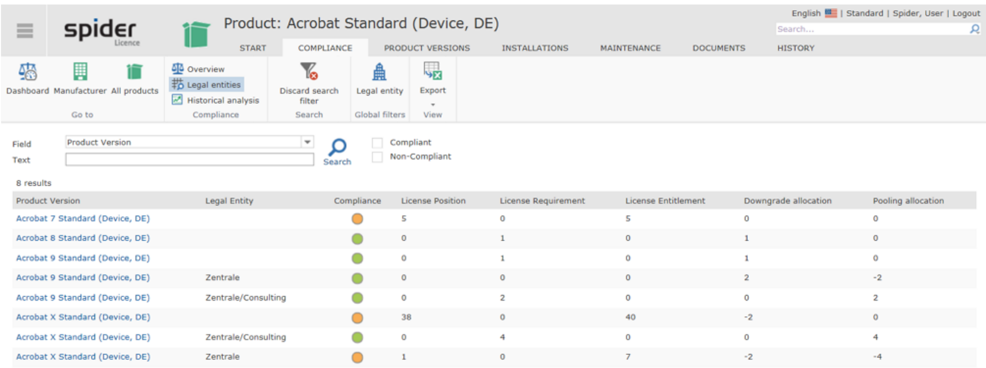
Dropdown field	What does the diagram show?
Compliance by legal entities	The diagram shows the number of legal entities containing this product as well as their compliance degree (see diagram above).
Product versions by installations	The number of installations per product version are indicated in absolute numbers and as percentage.
History of product versions by license requirement (relative)	The composition of the license requirement over the last 6 months is indicated.
History of the product versions by license requirement (absolute)	The absolute license requirement per product version over the last 6 months is indicated.
Compliance history	This diagram shows the history of the product compliance over the last 6 months.
History of the license shortfall risk	If the financial data are available for the product, the monetary risk of the last 6 months is indicated in this diagram.
History of the license surplus value	If the financial data are available for the product, a possible license surplus value in the last 6 months is indicated in this diagram.
History of the cost of total applied entitlement	The cost development of the corresponding product is indicated over the last 6 months.

➢ To trace the history during a freely selectable period, click in the Compliance ribbon group on the **History analysis** ribbon button.



The underlying data can also be exported to Excel. To do this, click on the Export ribbon button.

➢ Click on the **Legal entities** button in the *Compliance* ribbon group if you want to view the license position for this product per legal entity in more detail.



The compliance data including downgrade and pooling allocation are listed.

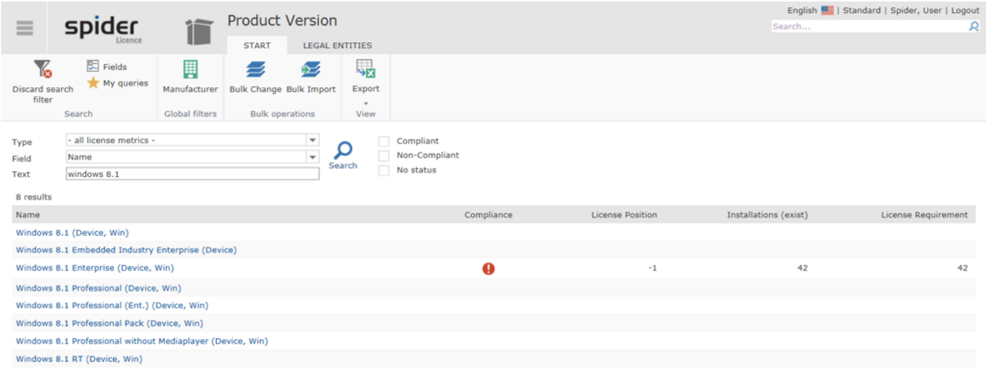
Form of the license allocation	Description
Downgrade allocation	Positive values show additional downgrade licenses which may be allocated for a product version. Negative values show the retirements from the product version of the legal entity which were used to deduct the downgrade licenses.
Pooling allocation	Positive values show additional pooling licenses which may be allocated for a product version. Negative values show the retirements from the product version of the legal entity which were used to deduct the pooling licenses.

Use the field search or set a global filter to further restrict the result.

➢ To navigate to a product version, go to the **Product version** ribbon in the ribbon bar or select the desired **Product version** in the left column.

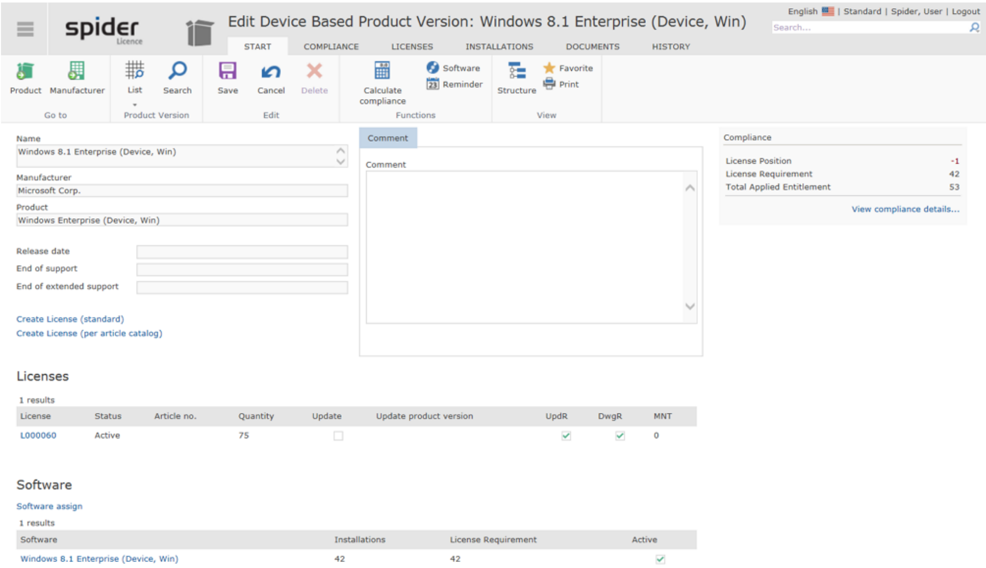
3.11.3 Product version compliance

➢ To open the **Product version compliance**, click on the menu item **Product version** in the menu of the Spider home page or in the **Backstage** (on page 35).

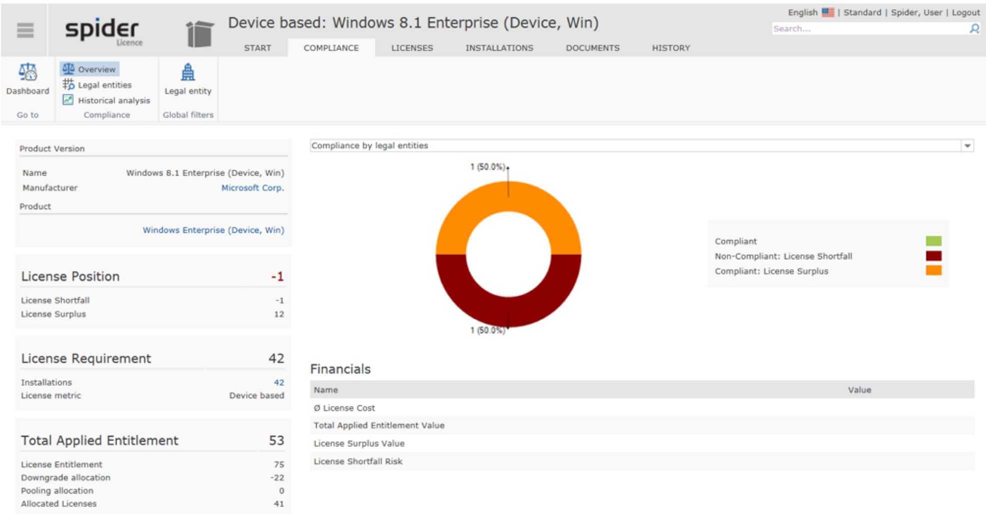


Use the field search or the compliance check boxes to the restrict the search. In this example the results are filtered for compliance-relevant product versions.

➢ Click on the product version in the **Product version** column the compliance of which you are interested in. For example: Windows 8.1 Enterprise (Device, Win).



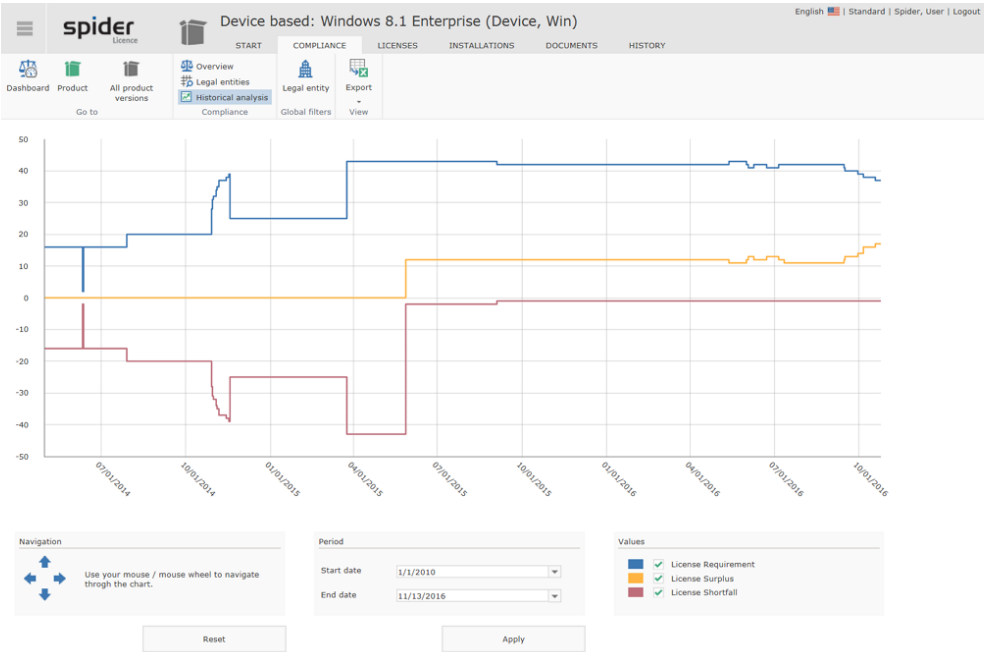
➢ In the compliance overview, click on the **View compliance details ...** link or navigate to the **Compliance** ribbon.



Use the dropdown field to view the following diagrams:

Dropdown field	What does the diagram show?
History of the total applied entitlement and the license requirement	The diagram shows a comparison between the license requirement and the license entitlement over the last 6 months.
Compliance by legal entities	The diagram shows the number of legal entities containing this product version as well as their compliance degree.
Compliance history	This diagram shows the history of the product version compliance over the last 6 months.
History of the license shortfall risk	If the financial data are available for the product version, the monetary risk of the last 6 months is indicated in this diagram.
History of the license surplus value	If the financial data are available for the product version, a possible license surplus value in the last 6 months is indicated in this diagram.
History of the cost of total applied entitlement	The cost development of the corresponding product is indicated over the last 6 months.

➢ To trace the history during a freely selectable period, click in the Compliance ribbon group on the **History analysis** ribbon button.



The underlying data can also be exported to Excel. To do this, click on the Export ribbon button.

➢ Click on the **Legal entities** button in the *Compliance* ribbon group if you want to view the license position for this product version per legal entity in more detail.

The compliance data including downgrade and pooling allocation are listed.

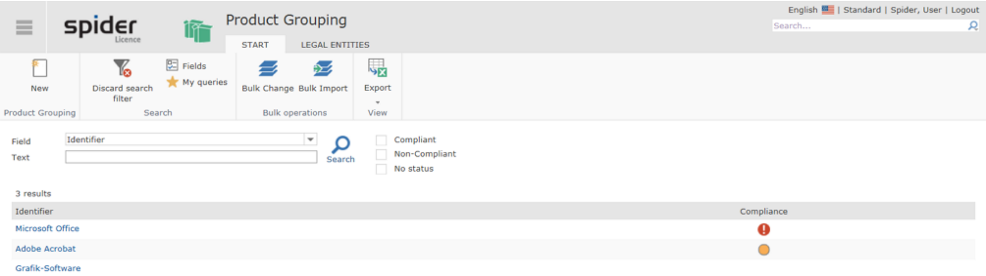
Form of the license allocation	Description
Downgrade allocation	Positive values show additional downgrade licenses which may be allocated. Negative values show the retirements from the product version of the legal entity which were used to deduct the downgrade licenses.

Form of the license allocation	Description
Pooling allocation	Positive values show additional pooling licenses which may be allocated. Negative values show the retirements from the product version of the legal entity which were used to deduct the pooling licenses.

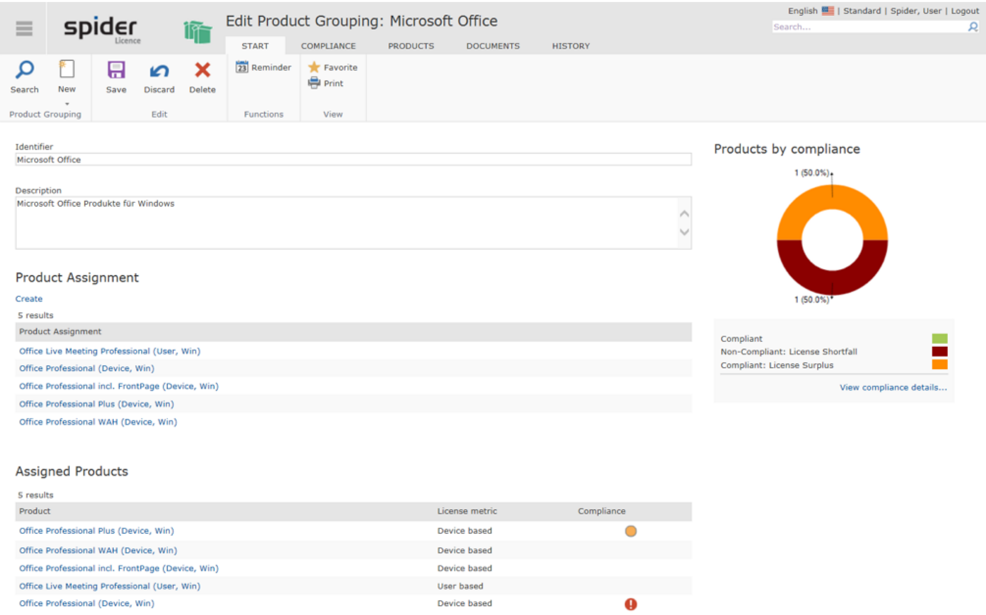
Use the field search or set a global filter to further restrict the result.

3.11.4 Product grouping compliance

- To open the **Product grouping compliance**, click on the menu item **Product grouping** in the menu of the Spider home page.

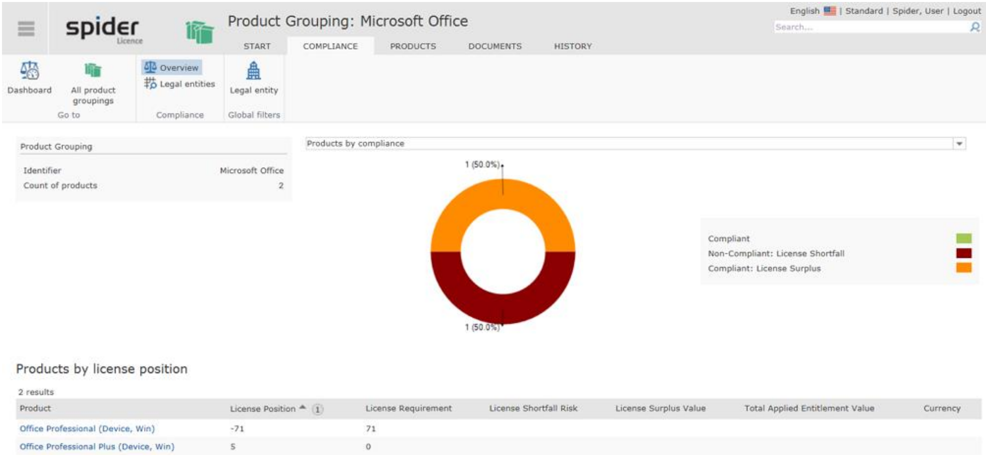


- In the **Identifier** column, click on the grouping, the compliance evaluation of which you are interested in or go to the **Legal entities** ribbon to see an overview of the compliance per legal entity and product grouping.



The diagram shows, how many products of this product grouping are *compliant* or *have license shortfall* or *license surplus*.

➢ Click on the link beneath the diagram or go to the **Compliance** ribbon.



Use the dropdown field to view the following diagrams:

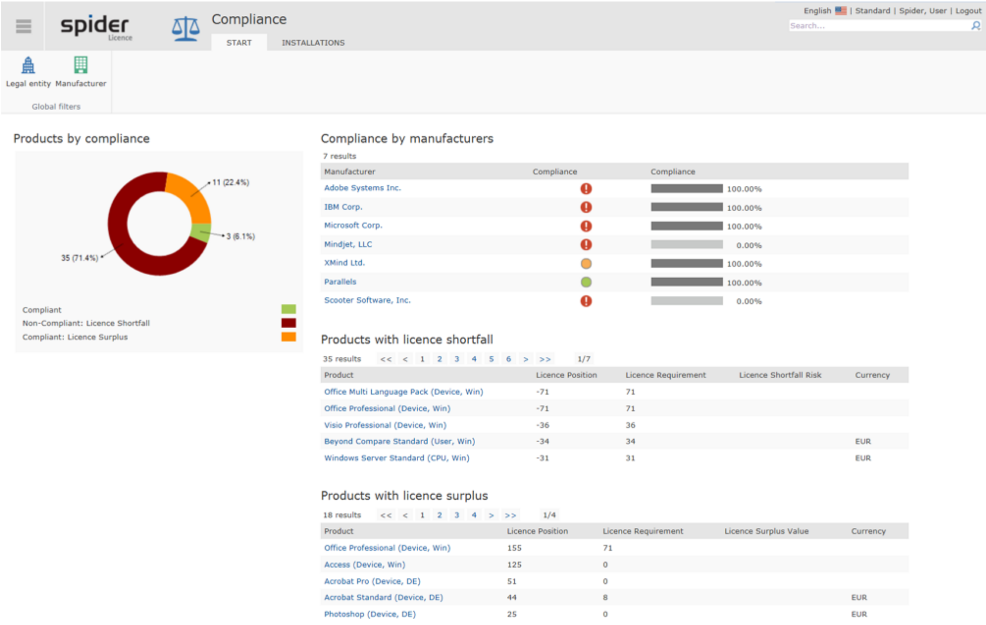
Dropdown field	What does the diagram show?
Products by compliance	The products of this grouping and their compliance degree are shown
Compliance by legal entities	The diagram shows the number of legal entities containing this grouping as well as their compliance degree.
Top 10 Products by installa-tions	The Top 10 products of this grouping are shown.
Progress of compliance	This diagram shows the compliance degree of all products of this group over the last 6 months.

➢ Click on the **Legal entities** button in the *Compliance* ribbon group if you want to view the license position for this grouping per legal entity in more detail.

The compliance data including downgrade and pooling allocation are listed. Use the field search or the compliance filter or set a global filter to further restrict the result.

3.11.5 Compliance dashboard

The Compliance dashboard shows the current compliance degree of all entered manufacturers as well as the compliance history of the last 6 months.



Global filters

The functions in the *Global filters* ribbon group allow for individual filtering by **Manufacturer** as well as by **Legal entity**.

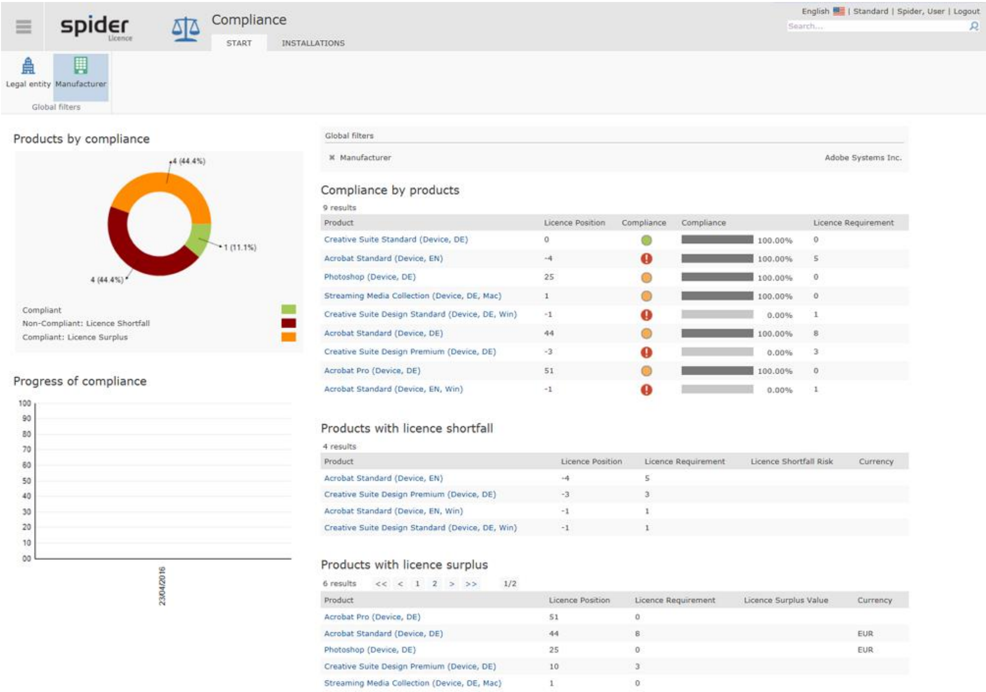
Note Global filters are used in the search forms and in the dashboards. These filters are persistent, i.e., the setting remain active when going to another web site.

Filter	Description
Select manufacturer	The indicated result refers only to the selected manufacturer. **Note** This filter is only used in the Spider Licence module.
Filter legal entity	The indicated result refers only to the selected legal entity. **Note** This filter applies across all Spider modules.
Include subordinated legal entities	By ticking the check box *Include subordinated legal entities*, these legal entities are also indicated.

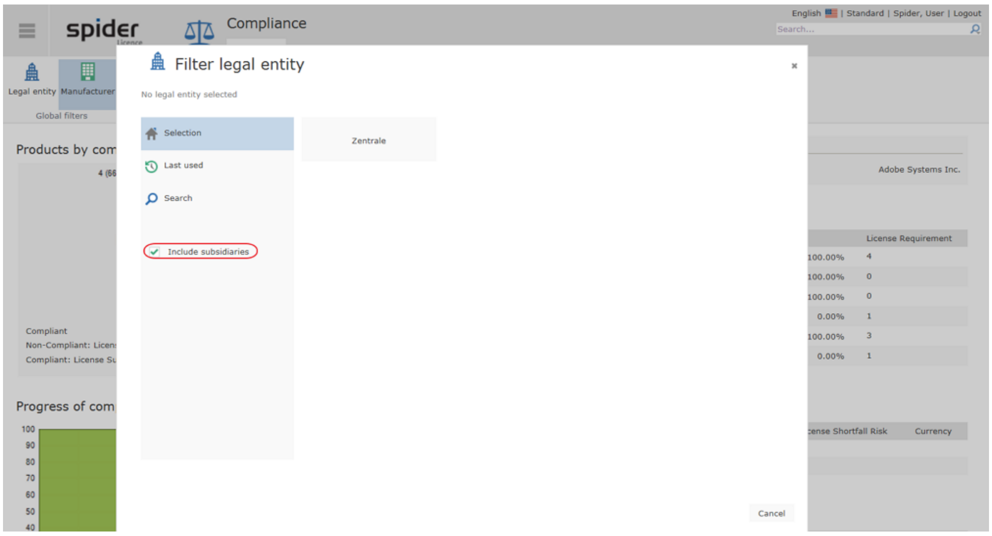
➢ Click on the **Select manufacturer** ribbon button if you want to see the key data for one manufacturer only.

By entering a filter criterion, the selection is reduced dynamically.

- Select the manufacturer, the key data of which you want to see.

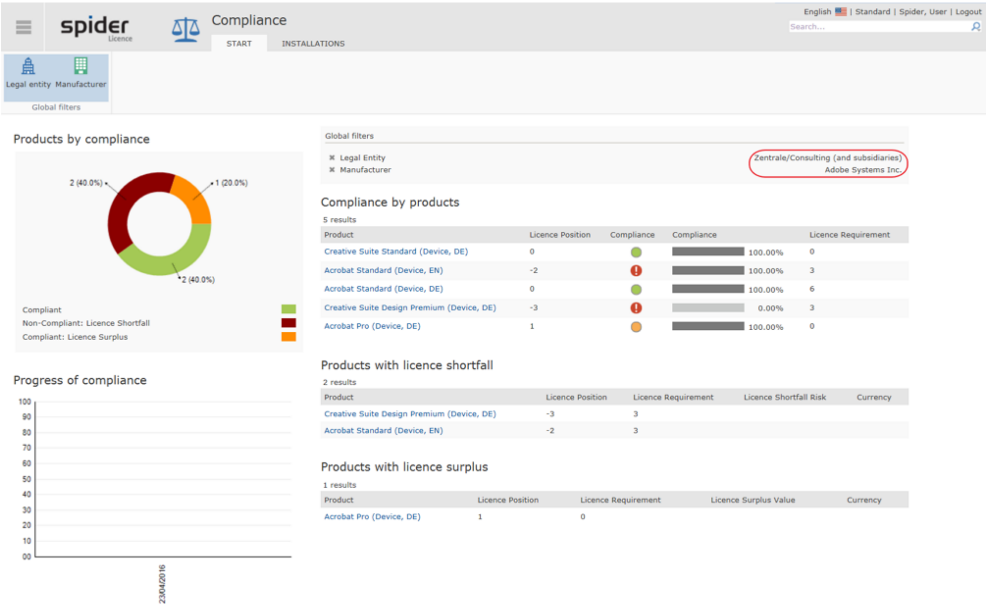


- Click on the ribbon button **Filter legal entity** if you want to see the key data for one legal entity only.



- By ticking the check box *Include inferior legal entities* you have the option to include these data into the view.

In the following example, the manufacturer filter has been set to *Adobe Systems Inc.* and the legal entity filter to the *Consulting* with its subordinated legal entities.

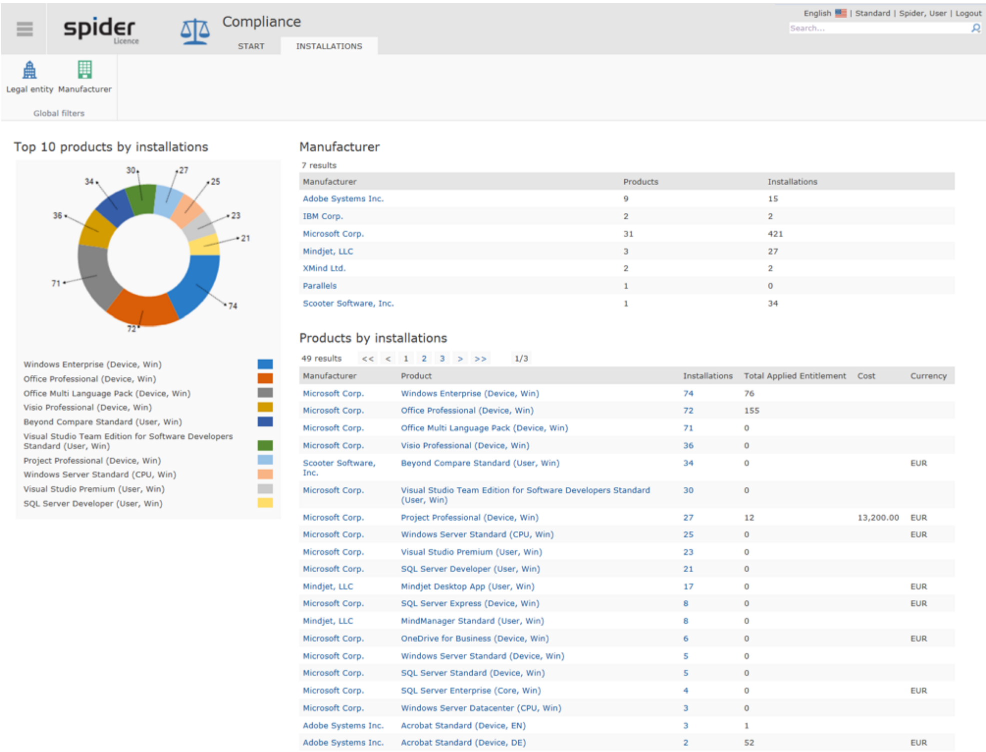


If global filter criteria are used, they will be shown in the *Global filters* field.

➢ By clicking on the **cross**, you can reset a selected filter.

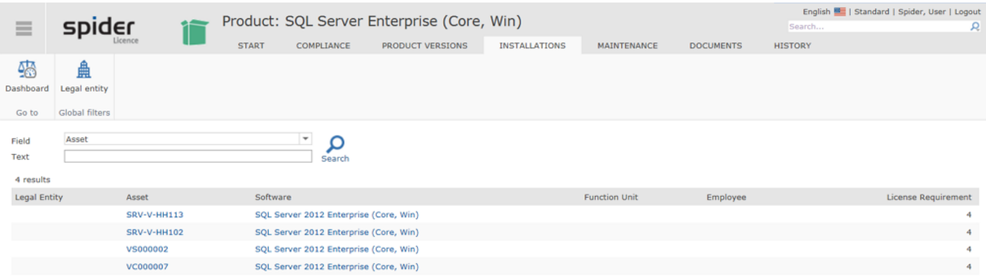
Installations ribbon

The **Installations** ribbon shows the Top 10 of installed products.



Via the links in the columns *Manufacturer*, *Product,* or *Installations*, you can go to the corresponding areas.

➢ If you click on the **number** in the *Installations* column, you will receive a list of all assets on which the corresponding product is installed.



Use the links in the Asset column to go to the asset objects.

CHAPTER 4

Contract management with Spider Contract

4.1 Glossary of terms

4.1.1 Contract

The *contract* is the central object within Spider Contract. The contract object can be configured in various contract types. Apart from the standard fields that apply to all contracts, the various types of contracts include type-specific fields, as well as its own logic. The *Purchase contract* and *Communication contract* types, for example, have different fields.

Complex contracts are mapped via several linked objects. To add more information to a contract, you can assign *contract objects*, *contractual parties*, *invoices*, and *notes*. Depending on the configuration, other assignments are available. Additionally, you can map relationships between contracts. We distinguish between hierarchical relationships between contracts (superior - subordinated contract) and relationships between contracts of the same hierarchical level. Functional **description** (see "**Contracts**" on page 240)

4.1.2 Contractual parties assignment

Use the *contractual parties assignment* to manage multiple contractual parties' relationships for a contract. Functional **description** (see "**Contractual parties assignment**" on page 249)

4.1.3 Contract subject / attachment

Contract subjects or attachments are used to specify additional information for a contract. Use these data to check which technical or commercial data are relevant.

A contract subject must be assigned to a contract. Like the contract, also the contract subject is a standardized object. Apart from cross-type fields which apply for all contract subject types, you can define your own fields for each type. Functional **description** (see "**Contract subjects / attachments**" on page 252)

4.1.4 Contractual parties

Use the *Contractual party* object to manage the master data of the contractual parties. You can assign multiple *contacts* and multiple *addresses* to one contractual party. You can categorize and evaluate contractual parties. *Examples for such categories are Debtors* or *Creditors*. In addition, possible *legal successions* can be mapped between contractual parties' objects. You can assign contractual parties to individual contracts.

4.1.5 Reference objects

A reference object is any object which can be referenced by a contract. The reference object is used to provide theme assignments, assets, projects, or other objects. Functional **description** (see "**Reference objects**" on page 270)

4.1.6 Status management

States are specified for the following objects in Spider Contract: *Contracts*, contract subjects / attachments, *contractual parties,* and *tasks*. The set status always shows the current condition (e.g., canceled, finished, etc.) of an object.

This bears the advantage that the objects can be evaluated anytime according to their status. Incomplete contracts or unfinished tasks are listed in an easy-to-understand way and thus will not be forgotten.

4.1.7 Status sequences

Status sequences are used to define a certain process sequence for the standardized *contract* and *contract subject* objects.

They are used to control the processing status or the life cycle of the contract and contract subject objects. Furthermore, they can be used for using certain automations in Spider Contract. Thus, you can save a rule for the contract status *Filed* which will send an e-mail to a predefined addressee each time a contract will reach this status. During the system configuration, the status sequences will be adapted according to the needs of the customer.

4.2 Contracts

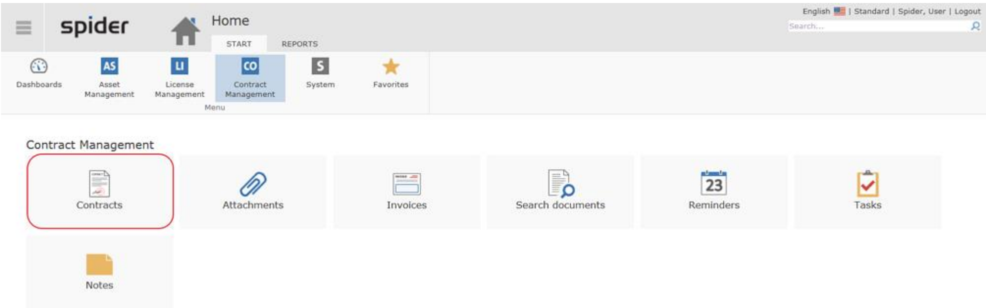
A contract is mapped via the contract structure in Spider Contract. The header data are maintained in the Contract object. These are, for example, contract title, status, duration, and termination data. Apart from the common fields which belong to each contract, the contract types can have additional type-specific fields. Additional contract data such as contractual parties or subjects are maintained in own objects which are subordinated. The **Contractual party's assignment** (on page 249) is used to specify which Contract partners are affected by the contract.

Depending on the complexity of the contract, further details are entered via subordinated or superior contracts. The contract structure comprises all objects and detail information belonging to a contract. Also, you can establish relationships to other contracts. The contract tree as a structural view offers a quick navigation within the contract structure.

4.2.1 Create contracts

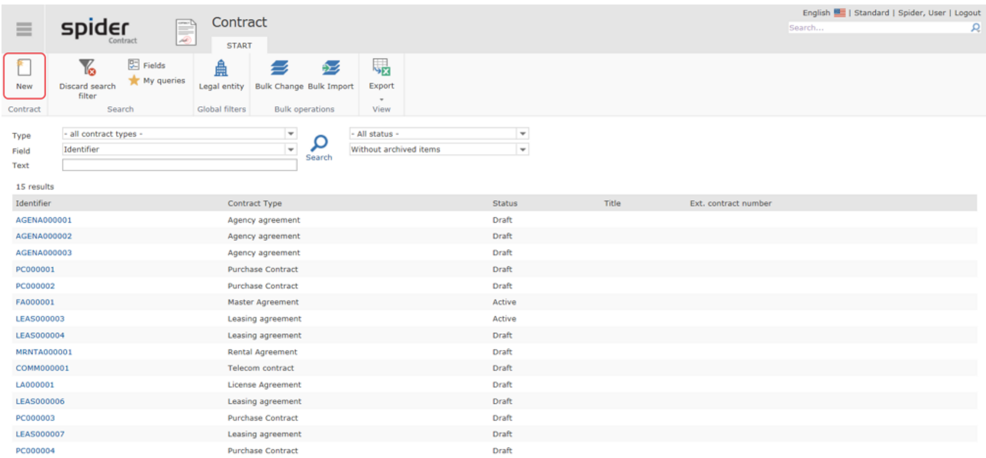
If you have the required permissions, you can create contracts.

➢ On the home page of Spider Contract, go to the menu area *Contract management* or to the **Backstage** (on page 35) and select the **Contracts** menu item.



Depending on the assigned roles and role permissions, the entered contracts are listed.

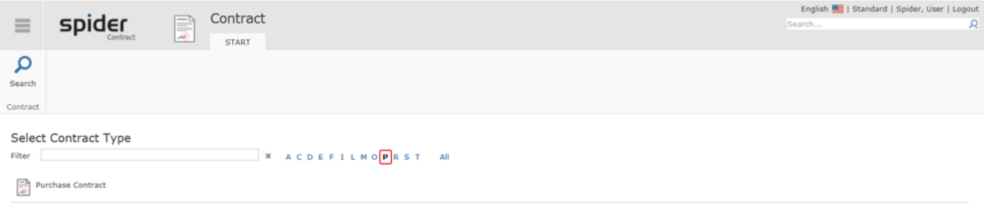
➢ To create a new contract, click on the **New** ribbon button.



Selecting the contract type

In the standard configuration of Spider Contract, you can select various contract types which have different configurations. Depending on the configuration, the selection may include other contract types.

➢ Select the required contract type, e.g., purchase contract, from the following list.

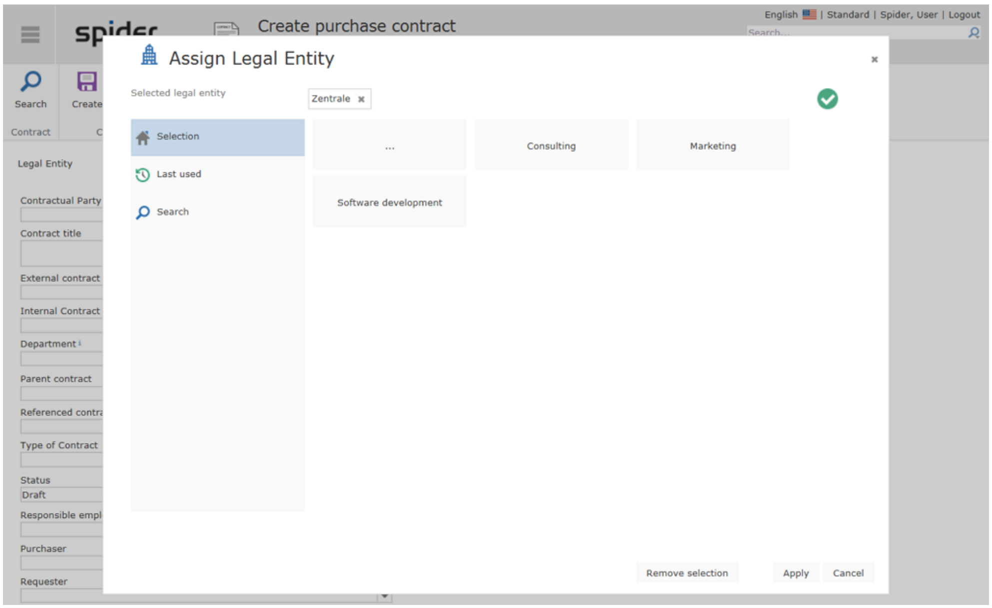


Note	A selected contract type cannot be changed anymore once the contract is created. If a wrong selection has been made, the contract must be deleted, and the data must be entered again selecting the correct contract type.

Assign legal entity (optional)

Using legal entities enables you to **restrict** (see "**Assign legal entity**" on page 69) the access rights, evaluations, etc. to the organizational structures of a company.

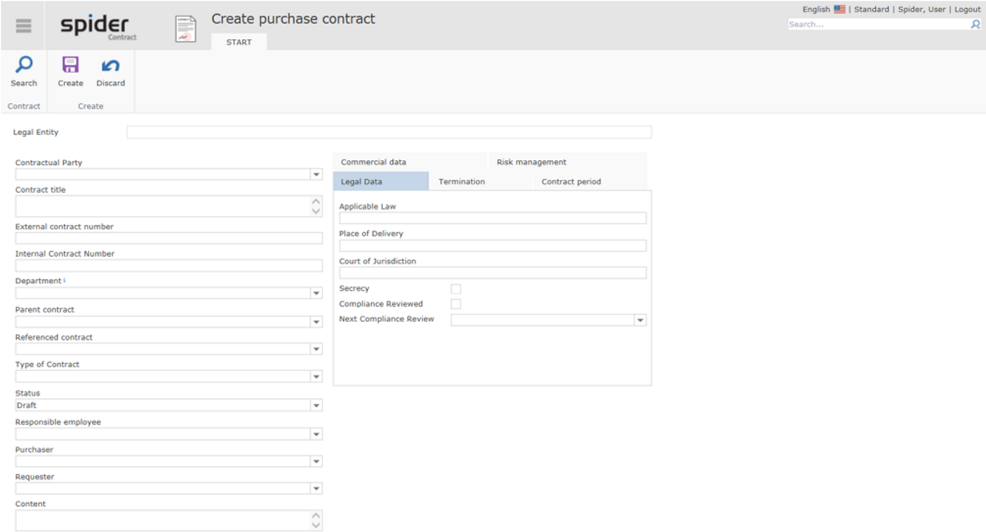
➢ The following step is optional. Spider allows you to assign a legal entity when you create a new contract. Select the corresponding legal entity and click on **Apply**.



➢ If you want to skip this step, click on **Cancel**.

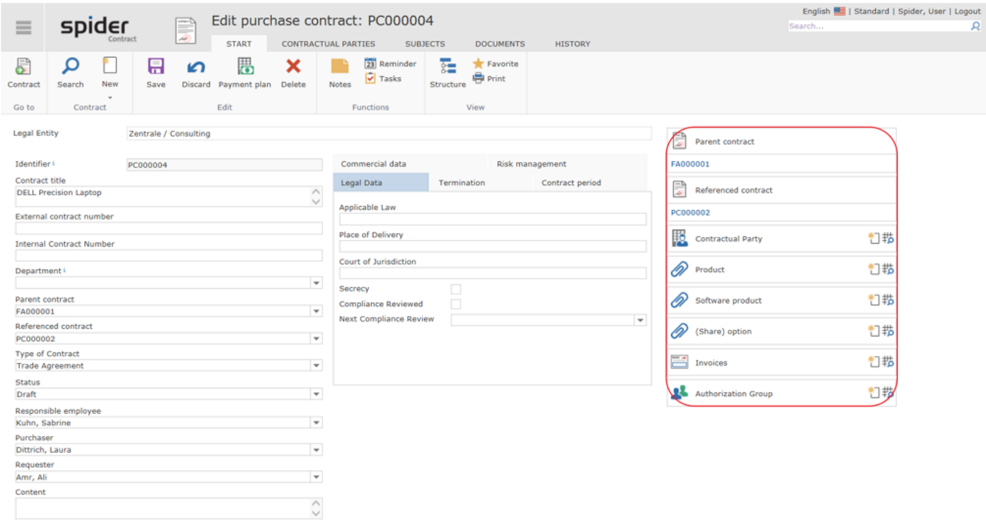
Note	The assignment of a legal entity can be executed later in the Edit form of a contract. Click into the Legal **entity** field.

After selection of the desired contract type, the related Create form will open.



➢ Enter the contract data in the corresponding fields and click on the **Create** ribbon button to save your input.

The Edit form for this contract will open. The ribbon shows functions and additional tabs. So, you can access contractors and items directly via the tabs. Depending on the configuration, the object listers shown on the right can be used to assign other objects to the contract (e.g., contract items, invoices, authorization groups, etc.). These additional objects are assigned to the contract by using the **New** icon in the corresponding object lister.



Note	The identifier is the system-integrated contract number which must be unique in such a way that a contract can be found by stating the identifier. Depending on the configuration, the identifier is given by the system or can be changed manually.

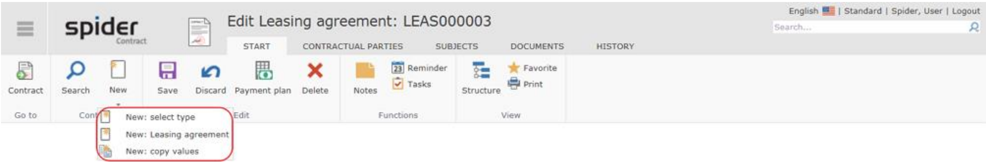
Duplicate contracts

You can create a new contract also in the Edit form of an existing contract. You can select whether:

a) you want to create a new contract of the same type,

b) you want to take over the field contents,

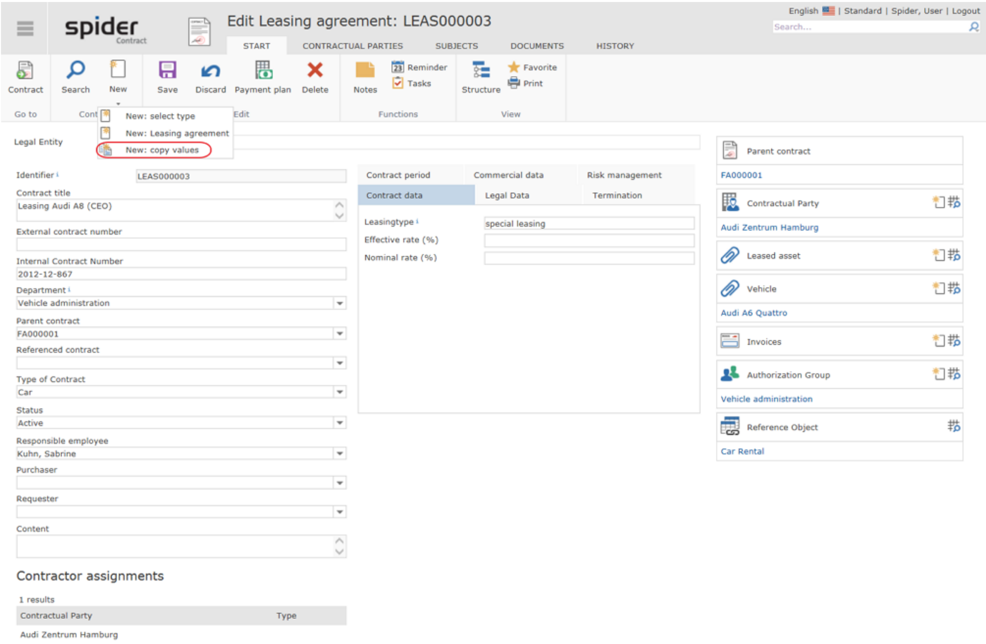
c) whether you want to select another contract type.



Use the **copy values** function to create an identical contract without assignments. By default, the contract fields are already filled in with the values of the original contract but can be edited if required.

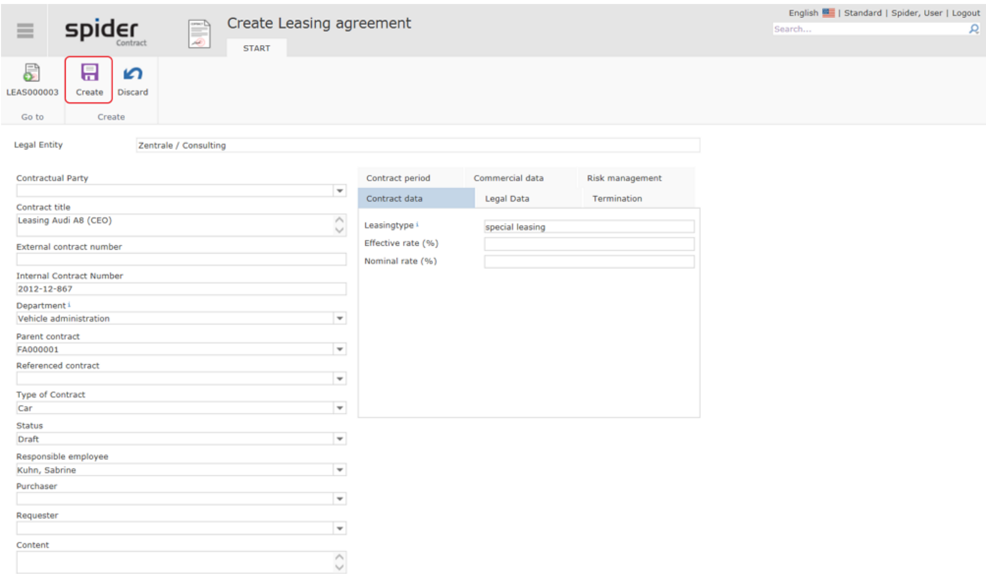
In the following example, a second car leasing contract shall be entered based on the template of an existing contract.

- Select the original contract to be duplicated.
- Click on the arrow below the **New** ribbon button and select the **New: copy values** option.



A new contract will be created with the same values as in the original contract.

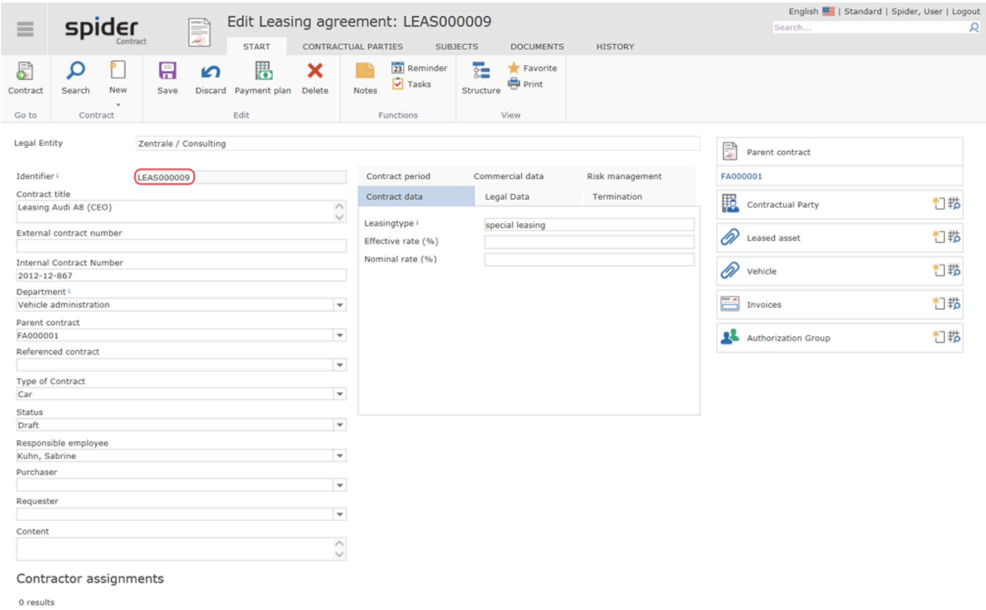
Note	However, the assignments of the original contract are not transferred.



If required, you can edit existing fields.

- Click then on the **Create** ribbon button to continue.

A new identifier is automatically assigned to the contract by the system. All other field values as e.g., the contract title, the contract type, the responsible staff, the leasing type, etc. have been accepted.



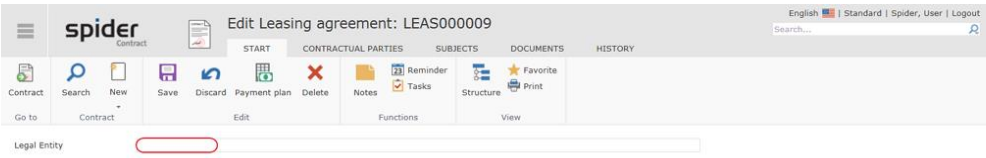
If required, the further editing of the contract is carried out as described in the section **Edit contracts** (on page 245).

4.2.2 Assign legal entity

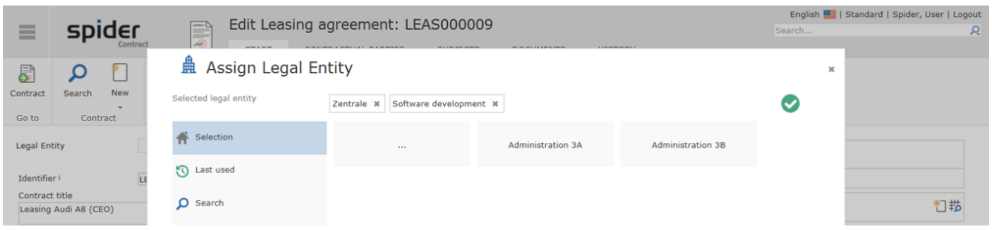
Contracts which have been assigned to a legal entity can only be viewed by users who possess a corresponding permission for this legal entity.

Users or roles have permissions for legal entities. That means that the access right is granted for a legal entity and all subordinated legal entities. This is like the permission in a file system. The legal entity can be selected directly when creating a contract. The assignment of the legal entity can be changed anytime in the Edit form of the contract.

➢ To assign a legal entity to a contract or to change the assignment, click into the **Legal Entity** field in the Edit form of the contract.



➢ Then you can select a legal entity or assign the recently used legal entities.



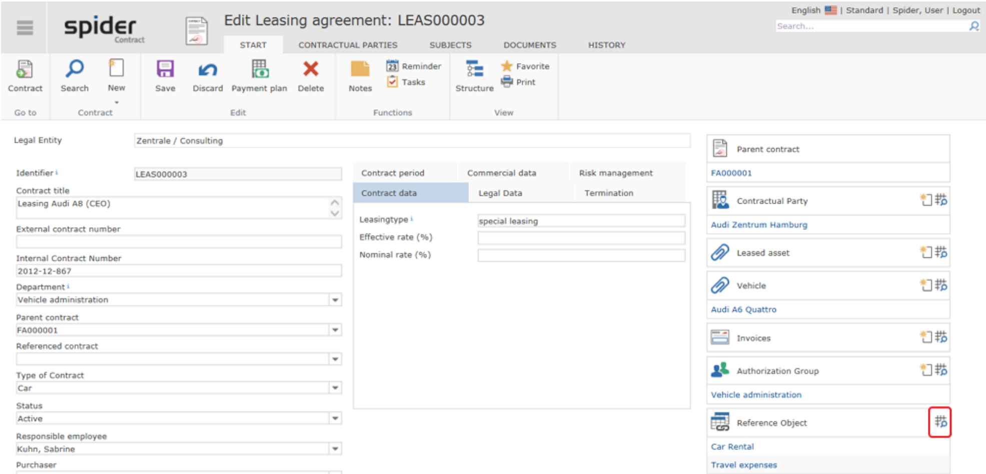
The path to the selected legal entity is displayed in the line *Selected legal entity*.

➢ If there are subordinated legal entities, they can be selected by clicking on the corresponding **tile**.

➢ By clicking on the **tile ...**, the superior level in the legal entity structure will open.

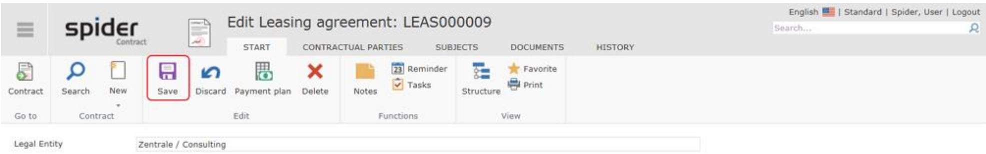
Note	The green tick confirms that a correct assignment is possible. If the user has no rights for a legal entity, he is not allowed to make an assignment (there is no green tick).

➢ Navigate through the structure and select the desired legal entity. For example, select the legal entity *Consulting*.



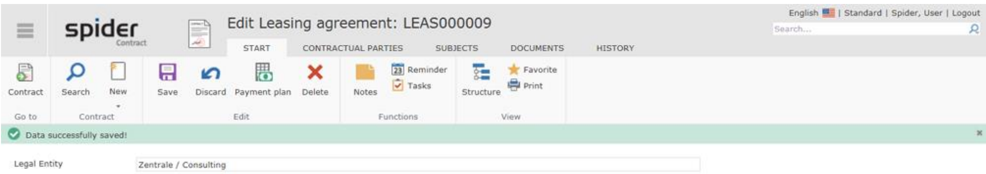
➢ Click on **Apply** to accept the selection.

In the Edit form of the contract, the complete path of the corresponding legal entity is shown.



➢ Click on the **Save** ribbon button.

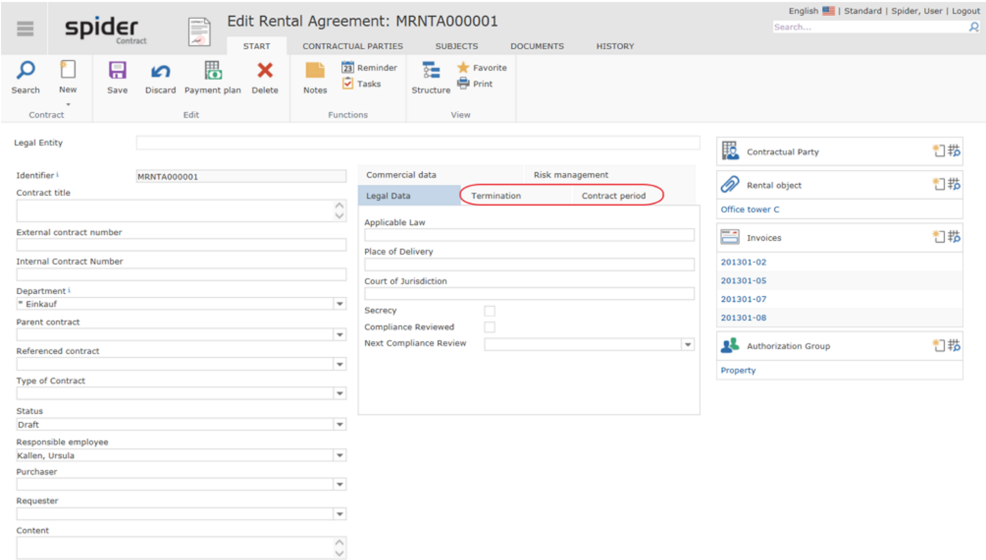
Attention	The assignment is only completed successfully after saving the change also in the Edit form of the contract.



4.2.3 Edit contracts

- On the home page of Spider Contract, go to the menu section *Contract management* or to the **Backstage** (on page 35) and select the **Contract** menu item.
- Select the contract to be edited in the search form by clicking on the identifier.

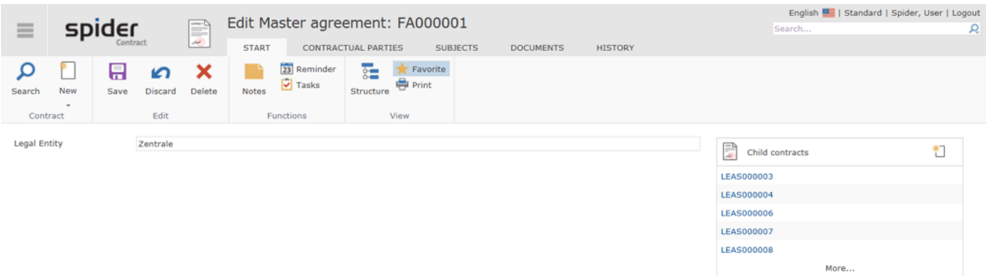
After the Edit form of the corresponding contract has opened, you can edit all entries except the fields with a gray background. The Rental Agreement, for example, offers various options in the *Contract period and Termination* tabs to save deadlines and to send reminder mails through the system on predefined dates.



Depending on the configuration, different termination rules can be saved for the contract.

Contract hierarchies

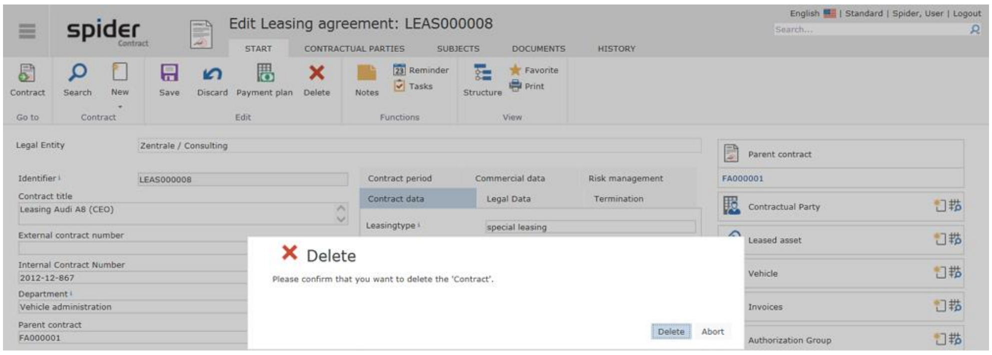
Parent contracts, *Referenced contracts* and *subordinated contracts* can be used to represent contract relations and dependencies. In the *Superior contract* and *Reference contract* data fields you can select one contract each. If the same superior contract is selected in various contracts, the superior framework contract will show all assigned subcontracts.



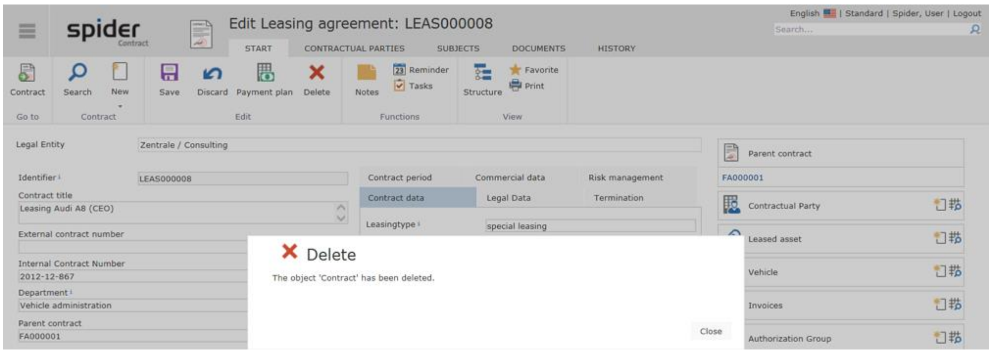
Viewed from the superior framework contract, all subcontracts are shown.

Delete contracts

The **Delete** ribbon button offers the possibility to delete contracts from Spider Contract. It is important to note that a contract can only be deleted if it has no relations to other contracts.



If the contract to be deleted still has dependencies, the deletion process will be interrupted with a message.



Note	Depending on the individualized configuration, certain permission roles may not have the deletion right.

4.2.4 Navigation

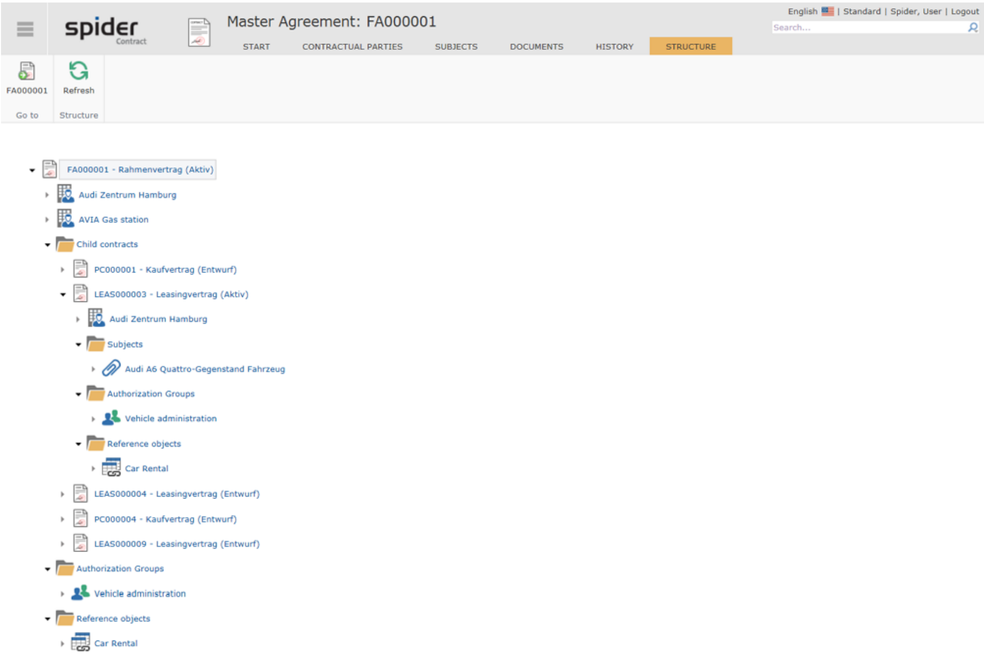
The ribbon offers you the following navigation options:

Ribbon group	Ribbon button	Function
Go to	Contract	Navigates directly to the superior contract. This ribbon group is only available if a superior contract exists.
Contract	Search	Navigates to the search across all contracts.
	New *	A new contract can be created.
View	Structure	You can go directly from the contract to the structure view. Click on Structure in the View ribbon group. The structure view shows all contract objects and allows for a quick naviga-tion within the structure view.

* If you click on the small triangle below the **New** ribbon button, you have the possibility to create a new contract of the same type with or without accepting the field contents. Alternatively, a new type can be selected.

4.2.5 Contract structure / Structure view

➢ To view the structure of a contract, click on the ribbon button **Structure** in the Edit form of the *contract* or the *contract subject*.



The *contract tree* shows the nested structure of a contract in which the calling object in the contract tree is shown with a gray background. The contract tree view can be adapted by showing or hiding the branches of the indicated fields. The contract tree is used to navigate directly to the various ob-jects. To jump back to the calling object, use the function *Go To* in the ribbon.

The following object relations are shown in the contract tree:

- Subordinated or superior contracts grouped by type.
- Assigned contractual parties per each contract.
- Subordinated attachments or contract subjects grouped by type for each contract.
- Authorization groups for each contract.

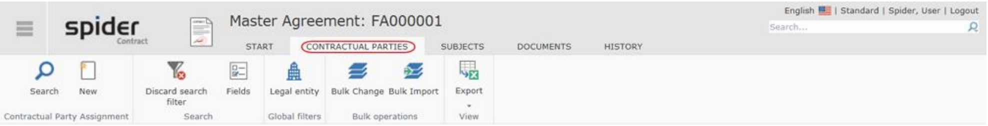
- Assigned invoices for each contract or attachment.

4.2.6 Contractual parties' assignment

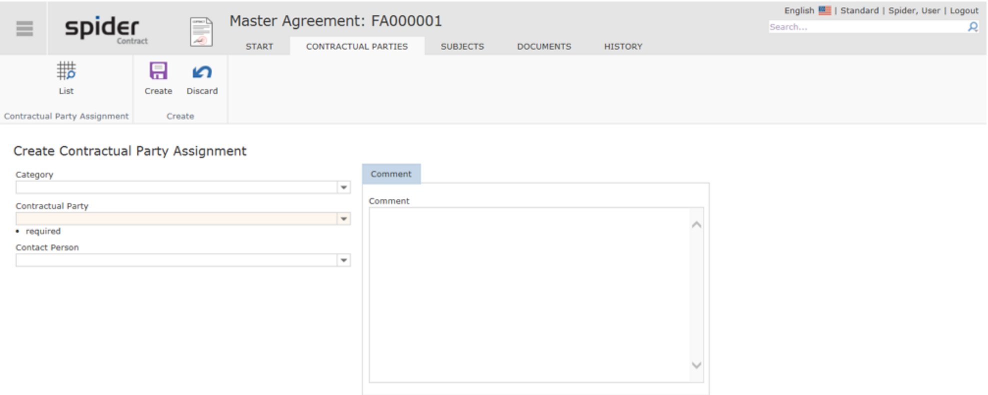
Use the *Contractual parties assignment* to map the relationship between the contract and its contractual party. The assignment of a contractual party to a contract may be specified in more detail by maintaining fields such as category (creditor/debtor) or contact.

Create contractual parties assignments

The contractual parties assignment can be created using the Edit form of a *contract* by selecting the **Contractual parties** ribbon or by using the **New** icon in the object lister.



➢ Click on the **New** button in the Contractual party assignment ribbon group or click on the **New** icon in the object lister *Contractual parties*.



➢ Select the **Contractual party** and enter the other values if required.

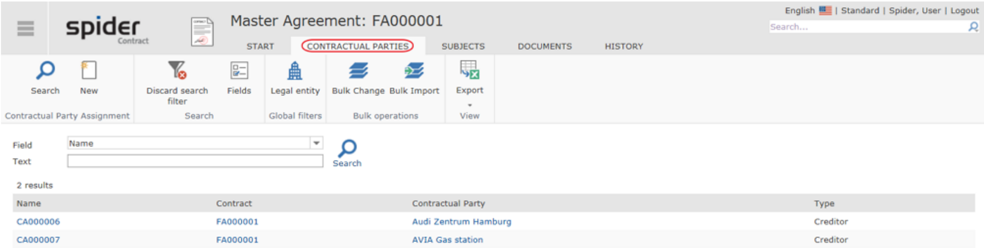
➢ Click on the **Create** ribbon button to save the contractual party assignment.

Note	Editing the contractual party assignment has no effect on the contractual party master data. No contractual party will be created, edited, or deleted. In fact, only the relation between the contract and the contractual party is created and described. Creating and editing contractual parties is **described** (see "**Contractual parties**" on page 260) in the section *Contractual parties*.

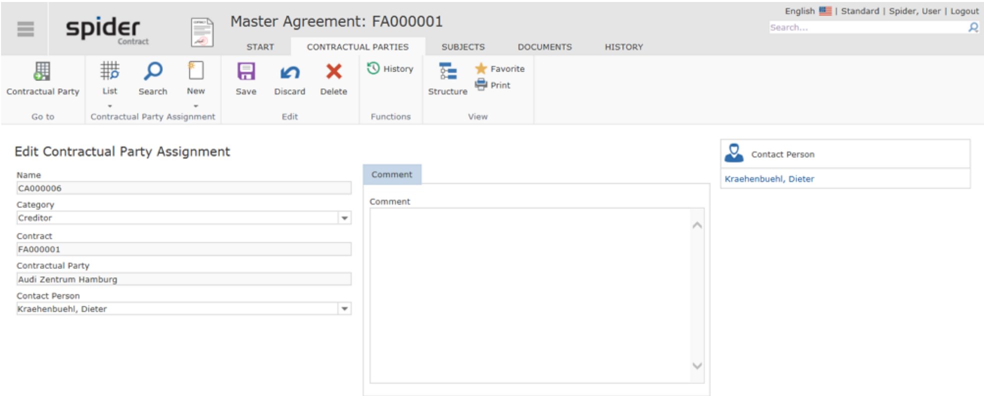
Edit / delete contractual parties assignments

You can change the assignment data by navigating to the *Contractual parties* ribbon in the Edit form of a **contract** or by clicking on the *List icon* in the object lister **Contractual parties**.

This will list the existing assignments.



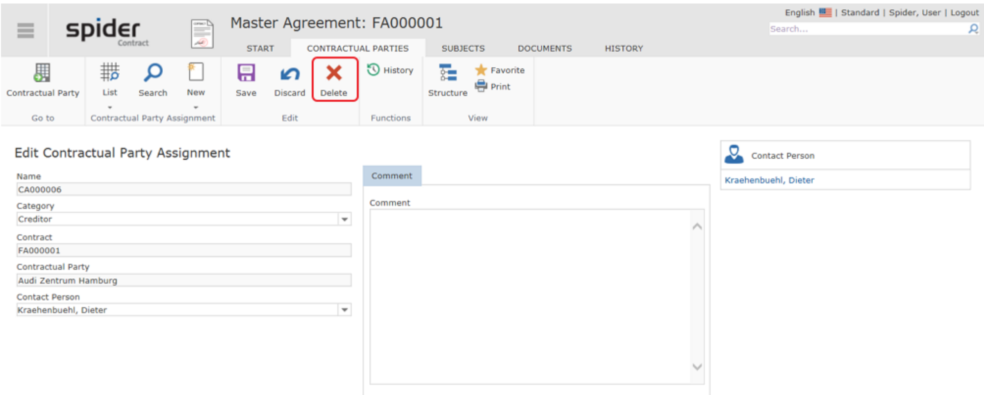
➢ In the **Name** column, click on the assignment to be edited.

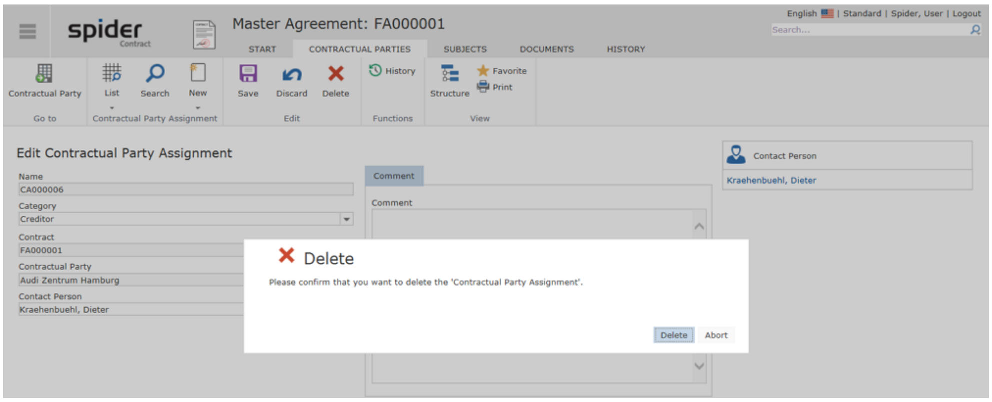


➢ After the change, click on the **Save** ribbon button to save your input.

Delete

Delete the contractual parties assignment by clicking on the **Delete** ribbon button (red cross).





Note	By confirming the deletion process, only the assignment to the contract will be deleted. The contractual party object will remain unchanged.

4.2.7 Contract subjects / attachments

Contract subjects or attachments are used to add and manage further detail information to the contract. A contract subject must be assigned to a contract. Examples for contract subjects are Vehicle, mobile phone, consultant, note or any other type of object or product you want to assign to a contract.

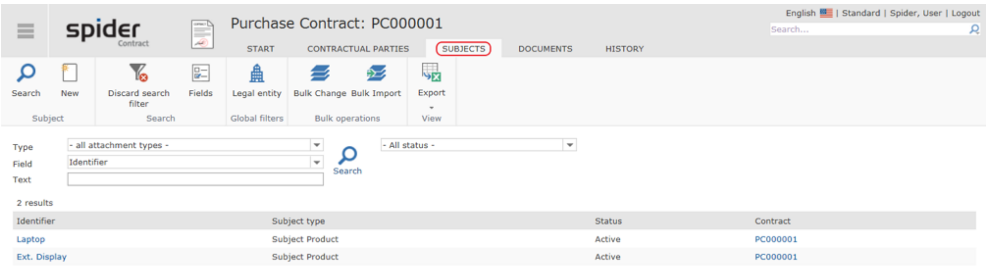
The following table lists some examples for contract subjects. These are available independent of the contract types. You can, for example, set up a "leasing subject" attachment for a leasing contract. For a purchasing contract, however, the "leasing subject" attachment will not be available. Instead, the following attachments are available: Product, software product, and option.

Contract type	Subject / attachment
Purchase contract	Product
	Software product
	Option
Leasing contract	Leasing item
	Vehicle
Framework contract	Item / additional agreement
Rental contract	Rental object
Communication contract	SIM card
	Mobile phone
	UMTS card
	Communication line
	Internet access

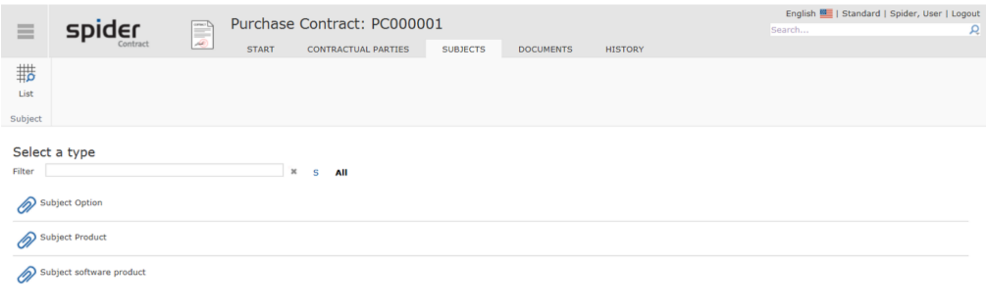
Depending on the configuration, the different contract types may have other subjects / attachments available.

Create contract subjects

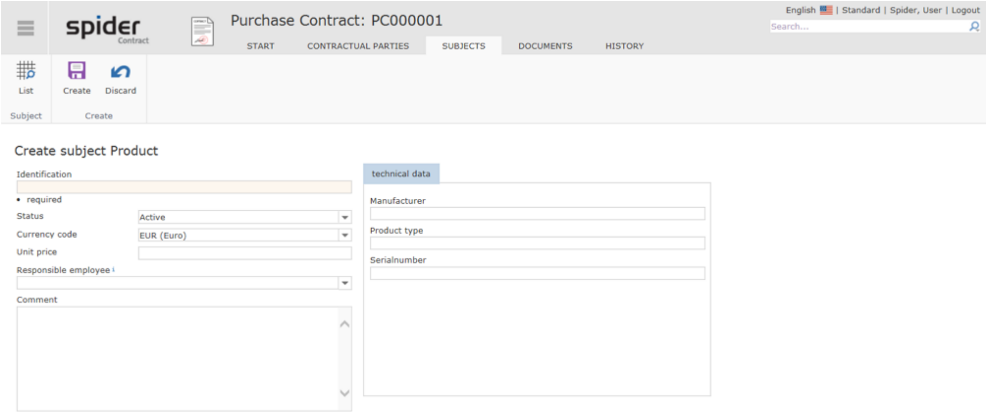
➢ Navigate to the *Subject* ribbon in the Edit form of a *contract* and click on the **New** button in the **Subject** ribbon group.



Only the subject types will be listed which are available for this contract type.



➢ Click on the corresponding type select it, e.g., Product.



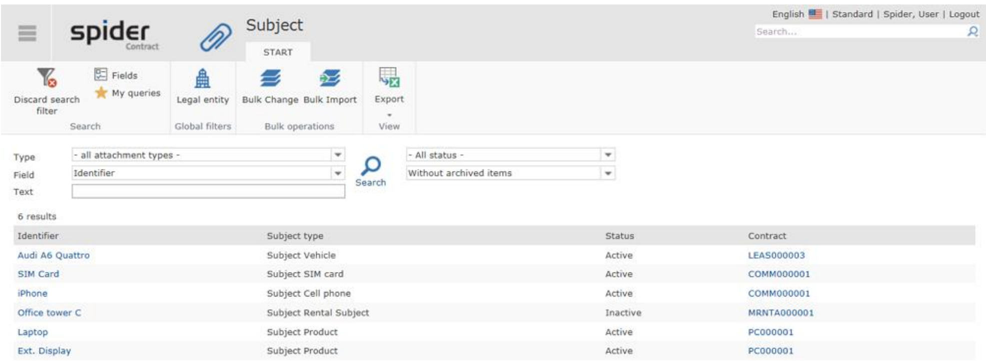
➢ Enter at least a value into the Description field and click on the **Create** ribbon button.

Note You also have the option to directly select the subject in the Edit form of a *contract* - Tab **Start** by clicking on the **New** icon in the corresponding object lister. Whether this option is available or not, depends on the configuration.

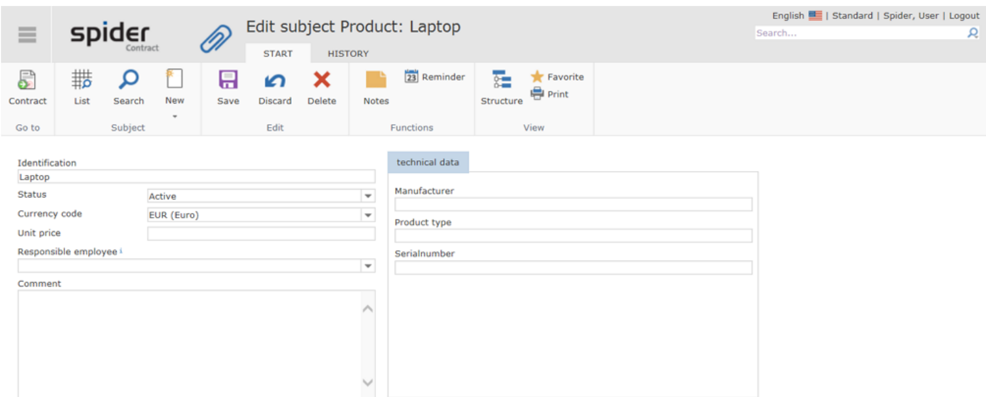
Edit contract subjects

➢ Starting on the Spider Contract **Home page**, click in the menu section *Contract management* or in the *Backstage (on page 35)* and select the **Attachments** menu item.

The entered subjects with their contracts are listed in the search form.

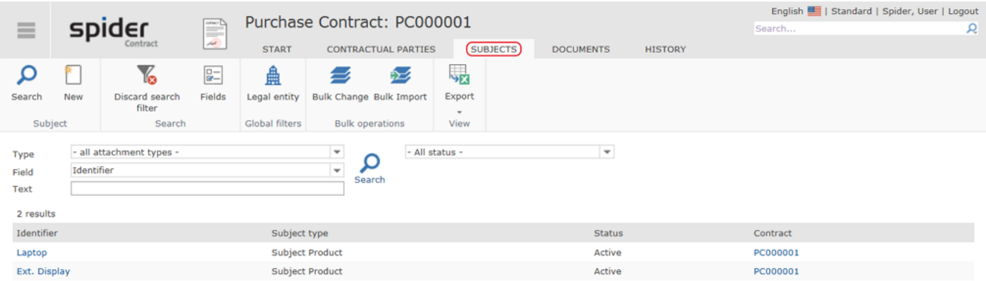


➢ Select the subject to be edited, e.g., Laptop.



➢ Enter values or edit the fields and click on the **Save** ribbon button to complete the change.

Alternatively, you can call up the subject from the Edit form of the contract by navigating to the **Subjects** ribbon.

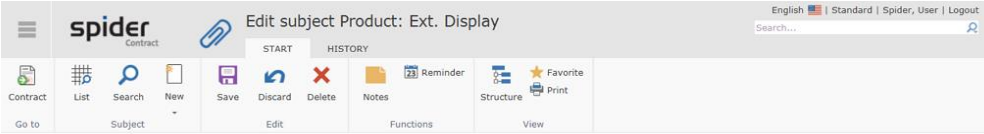


All subjects belonging to this contract are listed.

➢ Select the desired subject and make the change as described above.

Note	Another possibility to call up the Edit form of a subject is the object lister in the Edit form of the *contract*. Whether this option is available or not, depends on the configuration.

4.2.8 Navigation



The ribbon offers you the following navigation options:

Ribbon group	Ribbon button	Function
Go to	Contract	Navigates directly to the related contract.
Subject	Search	Navigates to the search across all contract items.
	List	Lists all items which are assigned to the same contract.
	New *	A new item can be created.
View	Structure	You can go directly from the contract subject to the structure view. Click on Structure in the View ribbon group. The structure view shows all contract objects and allows for a quick navigation.

* If you click on the small triangle below the **New** ribbon button, you have the possibility to create a new contract item of the same type with or without taking over the field contents. Alternatively, a new item type can be selected.

4.2.9 Tasks

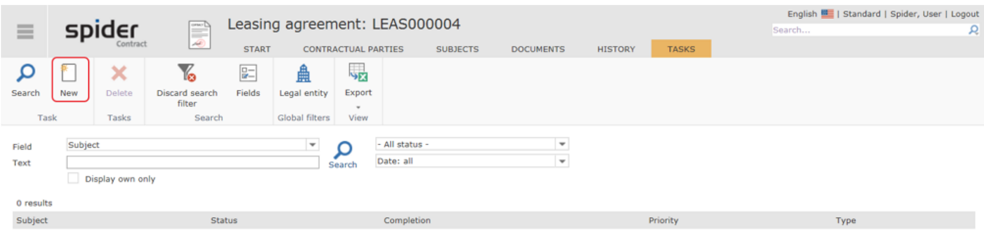
The *Task* object is used for the management of user tasks. Tasks allow for the organization of activities which are related to *contracts* or *contractual parties*.

Create tasks

Use the forms *Edit contract* (see "*Edit contracts*" on page 245) or *Edit contractual parties* (on page 262) to enter tasks.

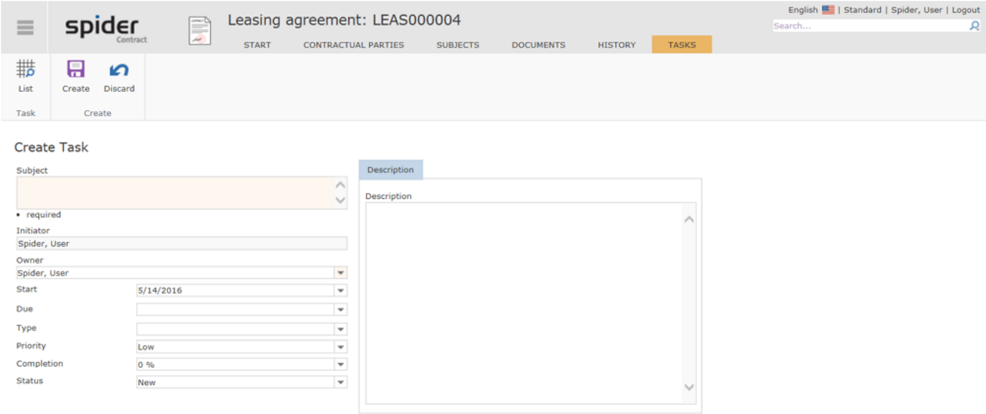
The following description is based on the contract. Like that, this procedure applies also for *Edit contractual parties.*

➢ Click on the button *Tasks* in the ribbon group *Functions* of the form **Edit contract**.



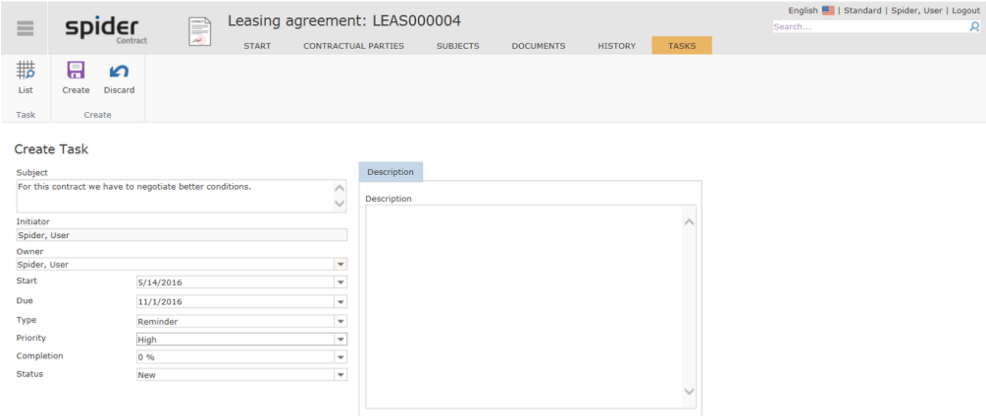
➢ Click on the **New** button in the *Task* ribbon group.

Then the *Create task* form will open.



- Enter the mandatory fields **Subject** and **Owner** and the other order parameters.

The field Initiator is automatically filled with the name of the creating user.



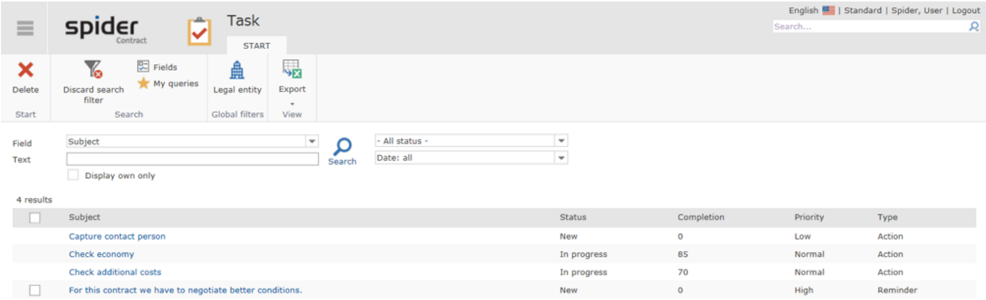
- Complete entering the task by clicking on the **Save** ribbon button.

Edit tasks

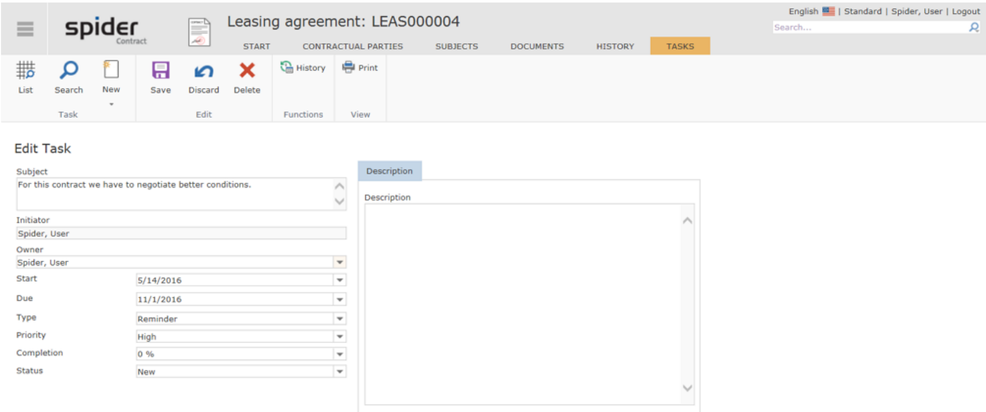
- Starting on the Spider Contract **Home page**, click in the menu section *Contract management* or in the *Backstage* (on page 35) on **Task**.

The entered tasks are listed in the search form.

Your own tasks are tasks where the initiator or owner corresponds to the logged-in user. All these tasks have a **checkbox** in the first column. You can select and delete your own tasks directly via the search.



- In the **Subject** column, click on the task to be edited.



- Edit / supplement the fields of the *Task* and complete the process by clicking on the **Save** ribbon button.

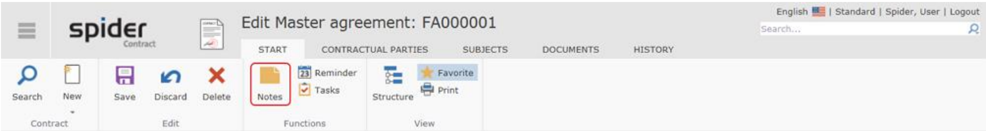
Note	If you want to create a new task at this point, click on the **New** button in the Task ribbon group.

4.2.10 Notes

You can create notes for the objects: *Contract*, *Contractual parties,* or *Subject*.

Create notes

Use the forms *Edit contract (see "Edit contracts" on page 245) or Edit contractual parties* (on page 262) or *Edit Subject* (see "*Contract subjects / attachments*" on page 252) to enter notes.



➢ In the corresponding Edit form of the main object (*Contract*, *Contractual parties,* or *Subject)*, click on the **Notes** button in the Functions ribbon group.

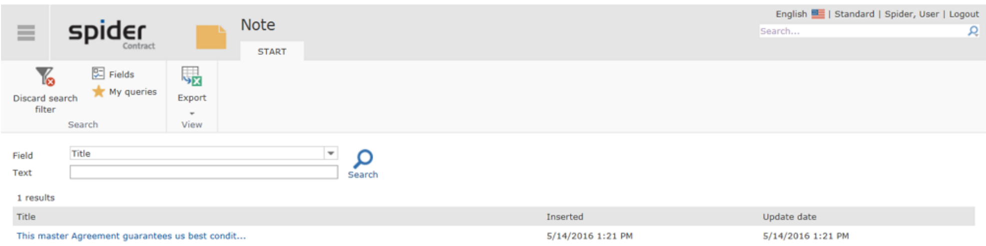
➢ Click on the **New** button in the Notes ribbon.

➢ Enter your note in the text field and complete the process by clicking on the **Create** ribbon button.

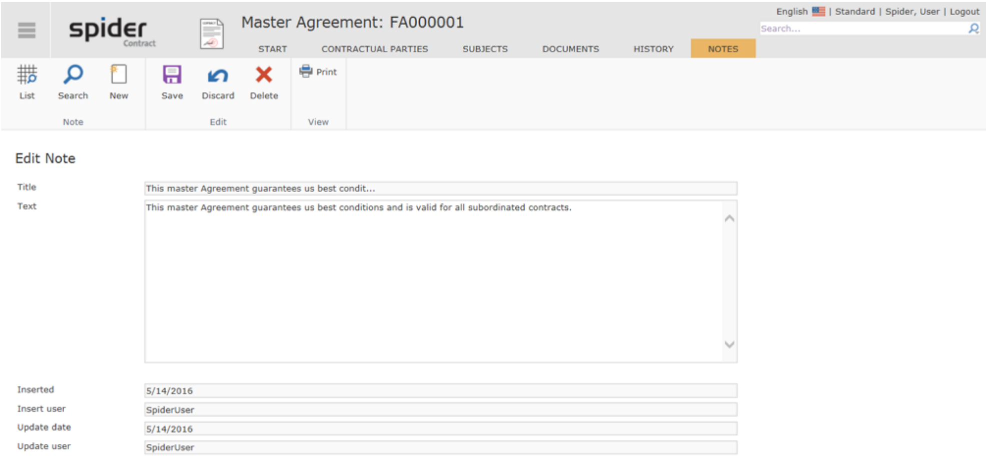
Edit notes

➢ Starting on the Spider Contract **Home page**, click in the menu section *Contract management* or in the *Backstage* (on page 35) on **Note**.

The entered notes are listed in the search form.



- In the **Title** column, click on the note to be edited.



Edit / supplement the *Note* and complete the process by clicking on the **Save** ribbon button.

Note	If you want to create a new note at this point, click on the **New** button in the Note ribbon group.

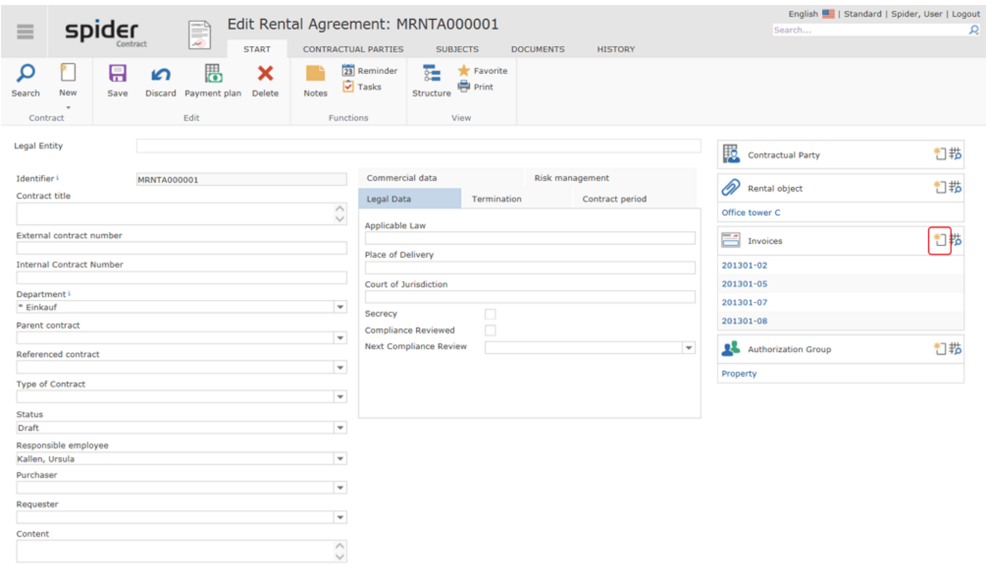
4.2.11 Invoices

Use the *Invoices object* to manage invoices related to the contract and to track, the context in which an invoice was made. Often, invoices do not have to be entered manually into the system but are imported via implemented mechanisms from ERP systems such as SAP into Spider Contract where they will be assigned automatically to the corresponding contracts. An invoice must be assigned to a contract or a contract subject.

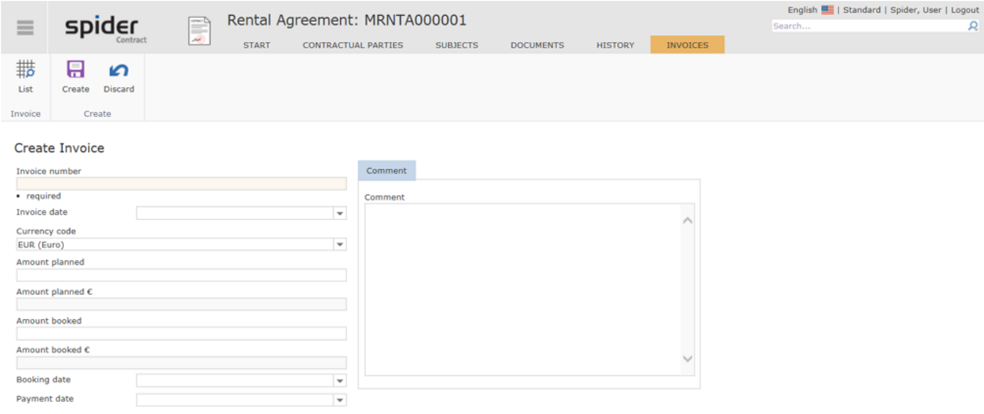
Create invoices

Use the *Edit contract* (see "*Edit contracts*" on page 245) form to create invoices.

- Click on the **New** icon in the object lister *Invoices* of the **Edit contract** form.



Then the *Invoice form will open.*

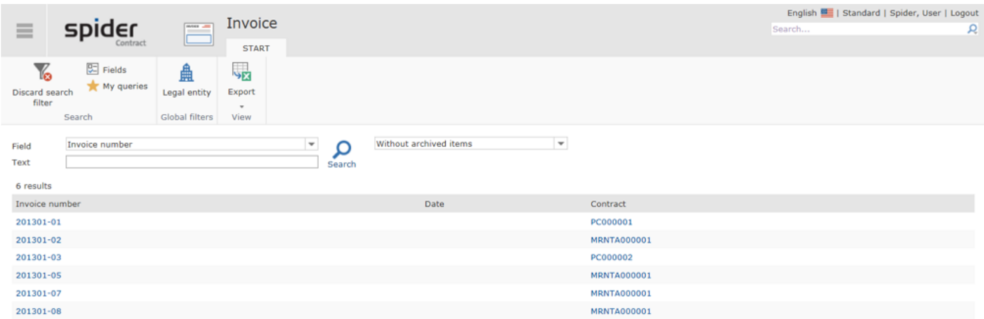


➢ Enter the **invoice number** and other data of the invoice and complete the process by clicking on the **Create** ribbon button.

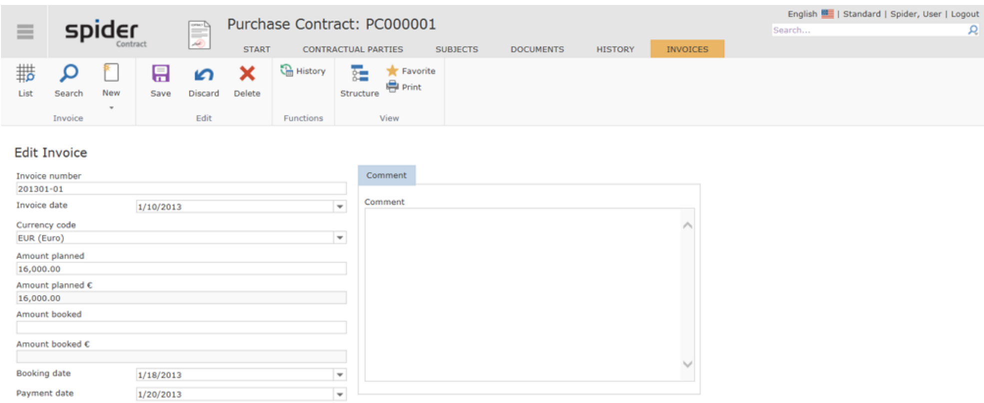
Edit invoices

➢ Starting on the Spider Contract **Home page**, click in the menu section *Contract management* or in the *Backstage* (on page 35) on **Invoice**.

The entered invoices are listed in the search form.



➢ Click on the **Invoice** to be edited in the *Invoice number* column.



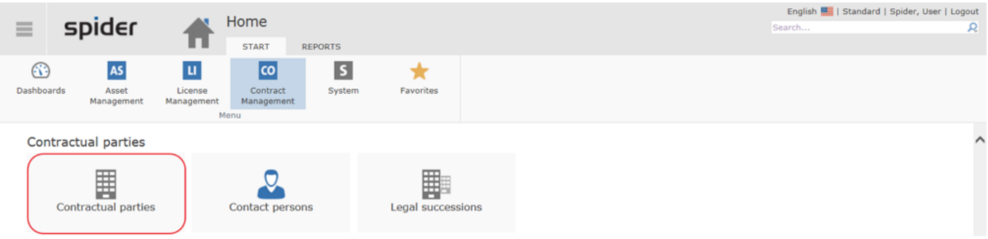
➢ Edit / supplement the invoice data and complete the process by clicking on the **Save** ribbon button.

4.3 Contractual parties

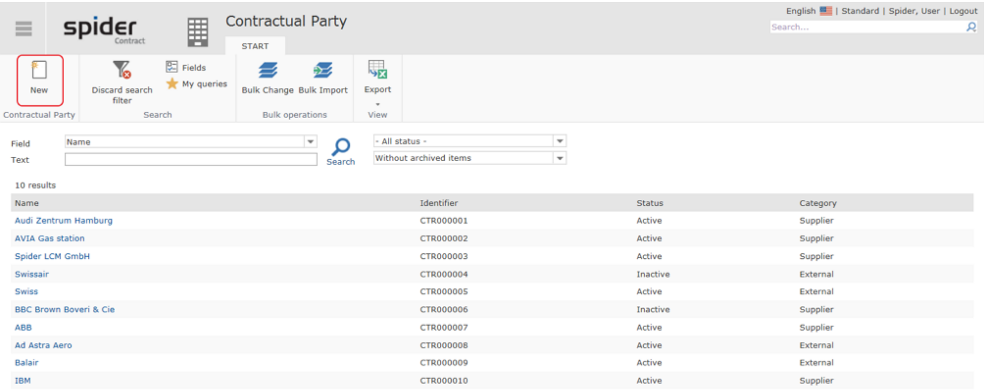
Use the *Contractual parties* object to manage the master data of the contractual parties. You can assign multiple *contacts* and multiple *addresses* to one contractual party. You can categorize and evaluate contractual parties. *Examples for such categories are Debtors* or *Creditors*. In addition, possible *legal successions* can be mapped between contractual parties objects. You can assign contractual parties to individual contracts.

4.3.1 Create contractual parties

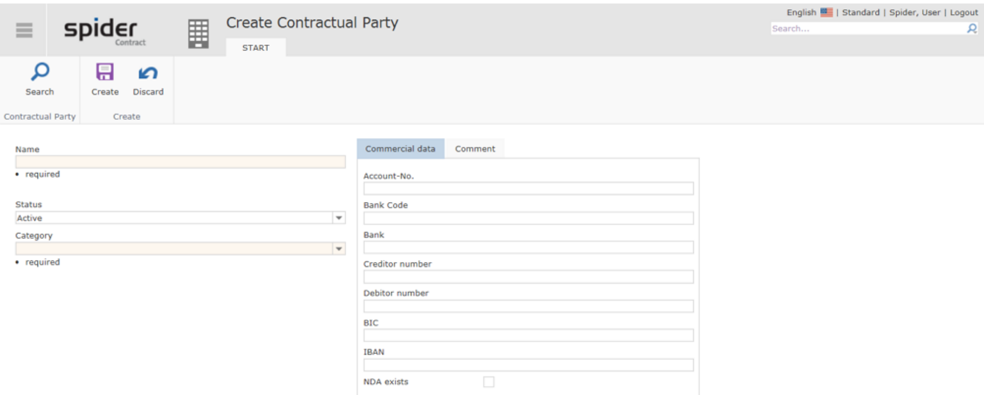
- On the home page of Spider Contract, go to the menu section *Contractual parties* or to the **Backstage** (on page 35) and select the **Contractual parties** menu item.



- To create a new contractual party, click on the **New** ribbon button in the *Contractual party* search.



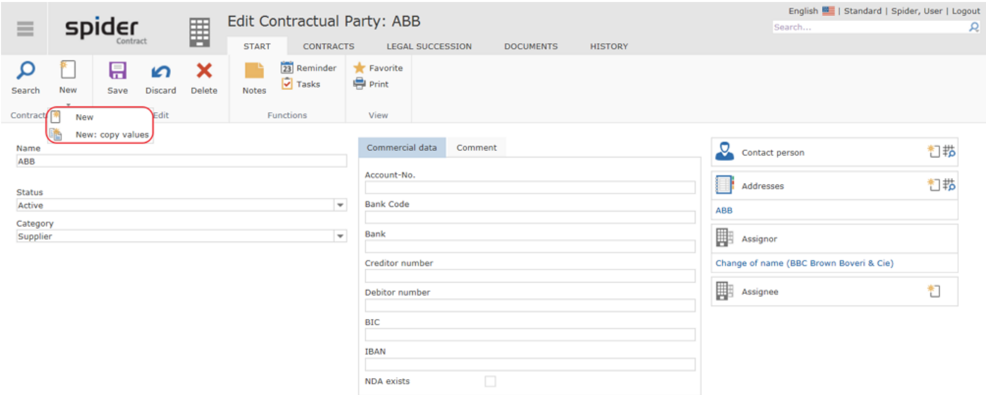
The creation form for the new contractual party will open.



- Enter at least the **Name** and **Category** of the contractual party and complete the input by clicking on the **Create** ribbon button.

Note Alternatively, a new contractual party can also be created in the *Edit contractual party* form.

➢ Click on the **New** ribbon button in the *Edit contractual party* form.

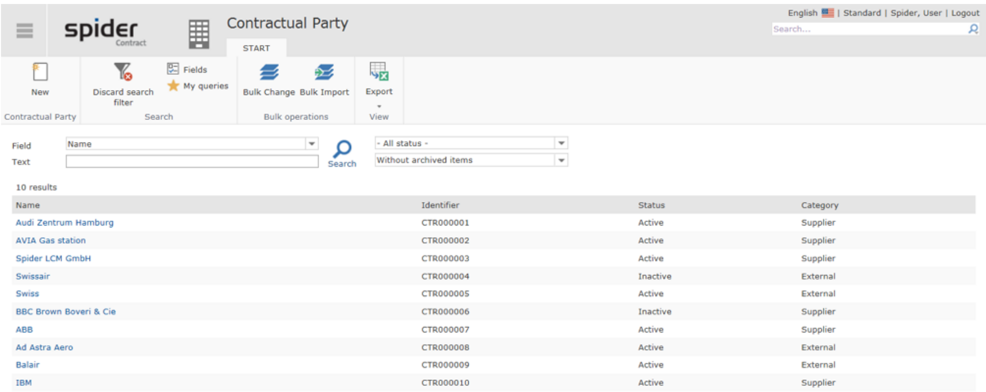


➢ By clicking on the **arrow** below the **New** button, you can select whether the field contents of the indicated contractual party should be taken over.

4.3.2 Edit contractual parties

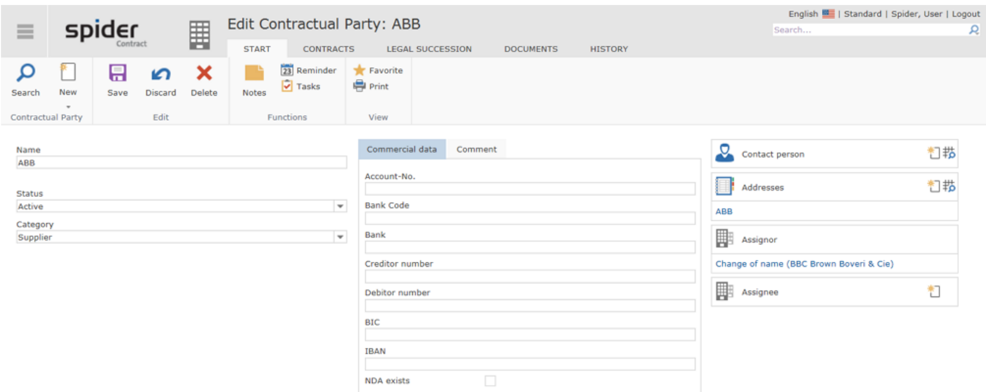
➢ Starting on the Spider Contract **Home page**, click in the menu section *Contractual parties* or in the *Backstage* (on page 35) on **Contractual parties**.

The Contractual party search will open.



➢ In the **Name** column, click on the contractual party to be edited.

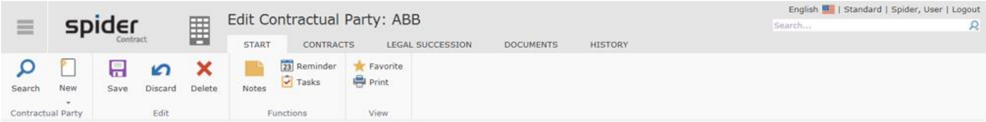
Then the form *Edit contractual party* will open.



➢ Edit / supplement the data of the contractual party and complete the process by clicking on the **Save** ribbon button.

Note	In the Edit contractual party form you can create *Notes* (see "*Create notes*" on page 258) as well as *Tasks* (on page 255) or *reminder* (on page 290).

4.3.3 Navigation



.

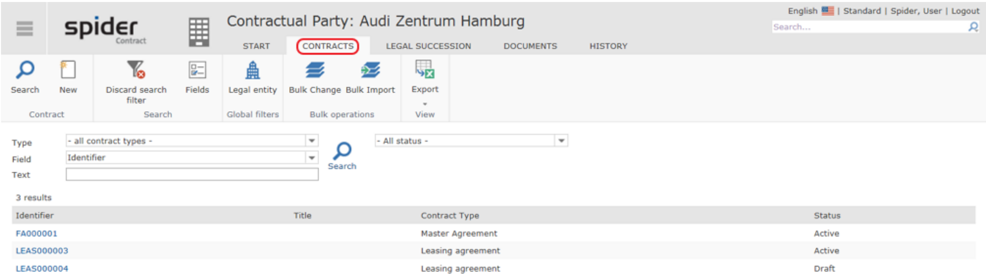
The ribbon offers you the following navigation options:

Ribbon group	Ribbon button	Function
Contractual party	Search	Navigates to the search across all contractual parties.
	New *	A new contractual party can be created.

* If you click on the small triangle below the **New** ribbon button, you have the possibility to create a new contractual party with taking over the field contents.

4.3.4 Contracts ribbon

➢ In the form *Edit contractual party* go to the **Contracts** ribbon**.**



A list of contracts of the current contractual party is shown. Use the filters to restrict the list. Like the search, you can select the shown columns via the field selection.

4.3.5 Legal succession

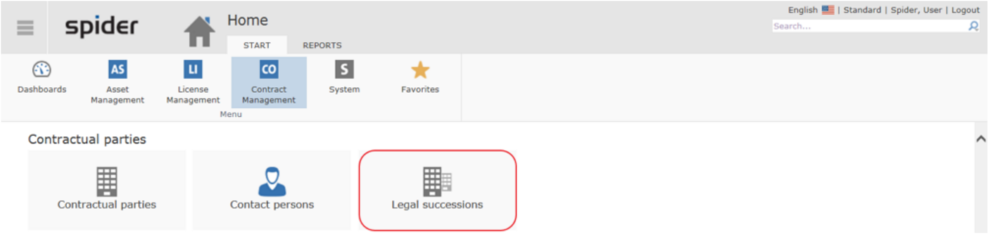
The *legal succession* is used to identify companies which have gone through a renaming process because of e.g., merging, overtaking or separation. A legal succession is expressed between two contractual parties. The first is considered the legal predecessor (Assignor) and the second is considered the legal successor (Assignee). The legal successions can be output and searched via a special overview.

➢ In the *Contractual party* form, go to the **Legal succession** ribbon.

A list of assignees to the current contractual party is shown.

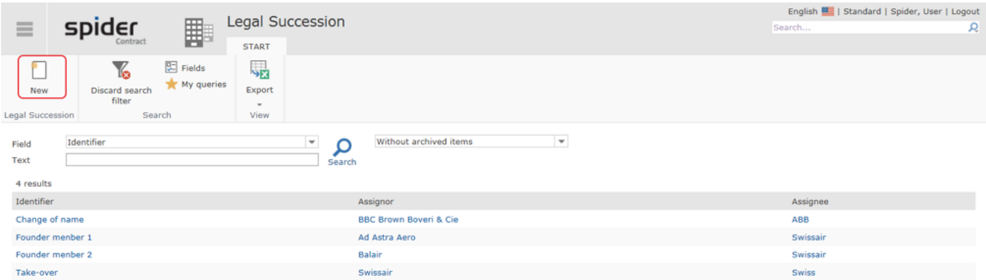
Create legal succession

- On the home page of Spider Contract, go to the menu section *Contractual parties* or to the **Back-stage** (on page 35) and select the **Legal succession** menu item.

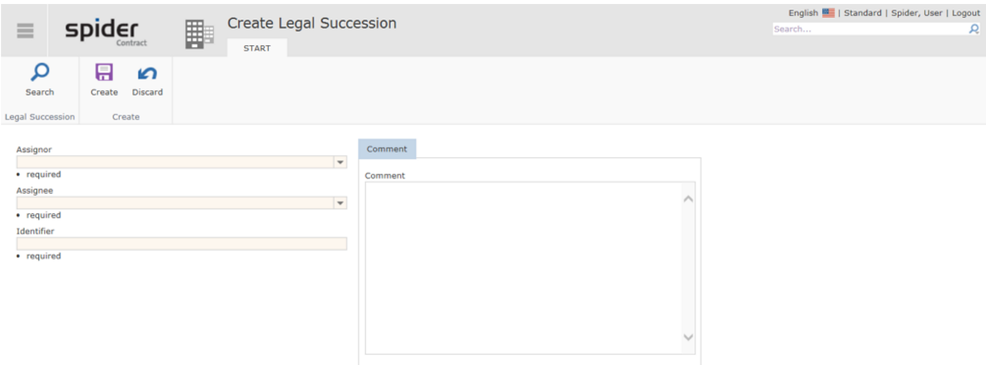


All legal successions entered in Spider Contract are listed.

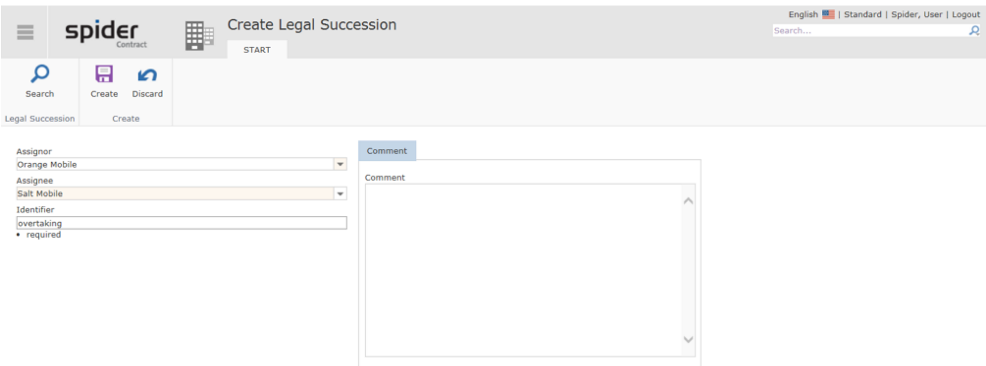
- To create a new legal succession, click on the **New** ribbon button in the *Legal succession search* form.



Then the *Legal succession form will open.*



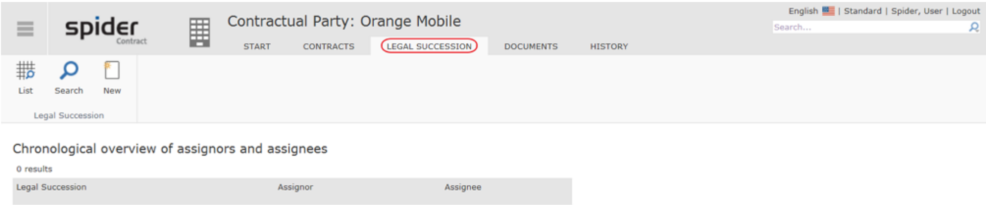
- Select the **Assignor** as well as the **Assignee** from the dropdown lists and name the legal succession.



- Complete the process by clicking on the **Create** ribbon button.

Note	Alternatively to the above-described process, you can also create a legal succession in the Edit form of the *contractual party*.

➢ Change to the ribbon *legal succession* and click on the **New** ribbon button.

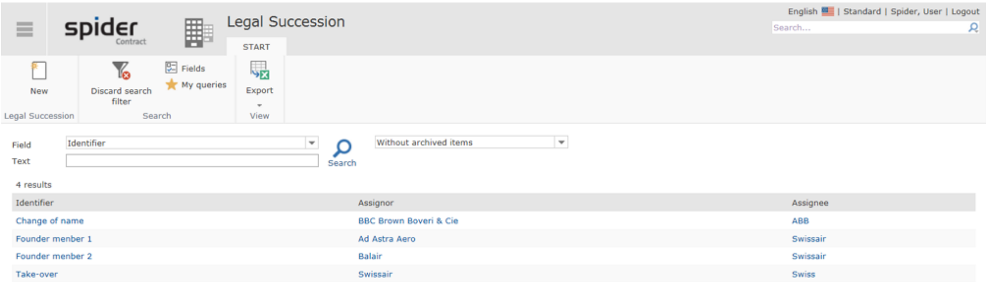


Then the *Legal succession form will open.*

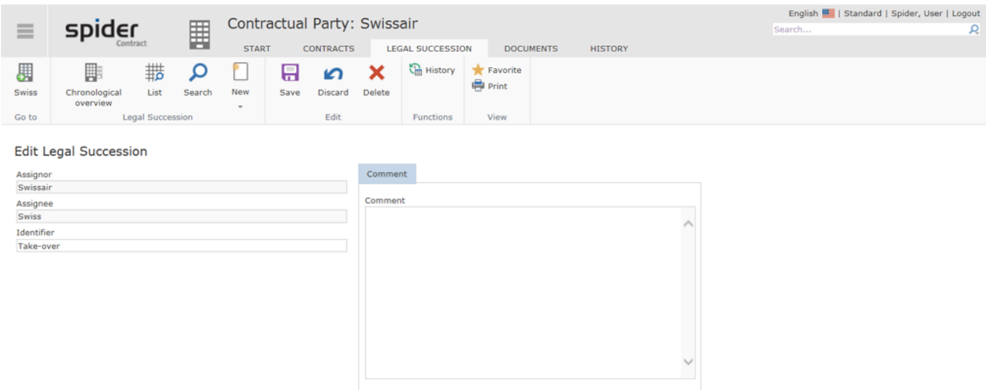
Edit legal succession

➢ Starting on the Spider Contract **home page**, click in the menu section *Contractual parties* or in the *Backstage* (on page 35) on **Legal succession**.

➢ In the *Legal succession search* form, click on the legal succession to be edited in the **Identifier** column.



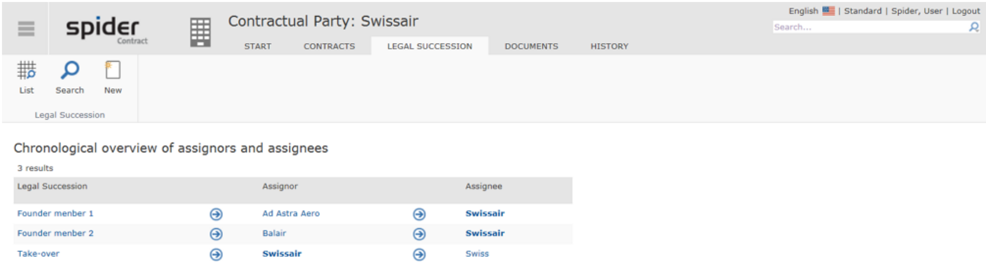
Then the *Edit legal succession* form will open.



➢ Edit / supplement the data of the legal succession and complete the process by clicking on the **Save** ribbon button.

Note	You can show a total overview of all Assignor and Assignee from the point of view of the selected contractual party in the Edit form of a legal succession.

➢ Click on the Chronological overview ribbon button.

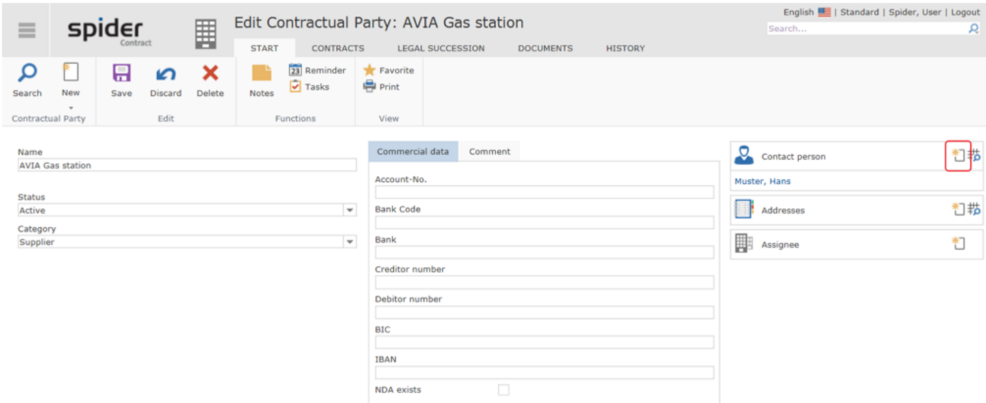


4.3.6 Contact

By means of the *Contact* object, the data of the contacts for the *contractual party* are managed. You can manage multiple contacts for one contractual party.

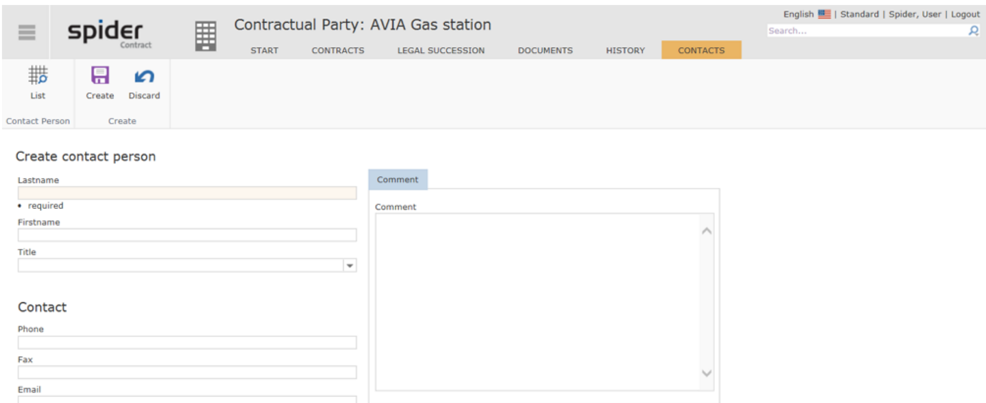
Create contact

Use the **Edit contractual party** (see "**Edit contractual parties**" on page 262) form to create contacts.



➢ Click on the **New** icon in the object lister *Contact person* of the *Edit contractual party* form.

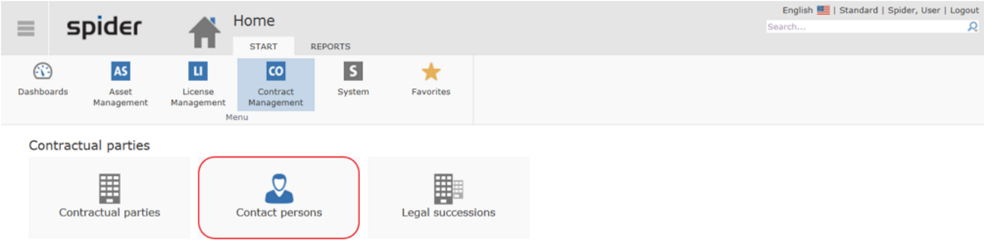
The creation form for the new contact person will open.



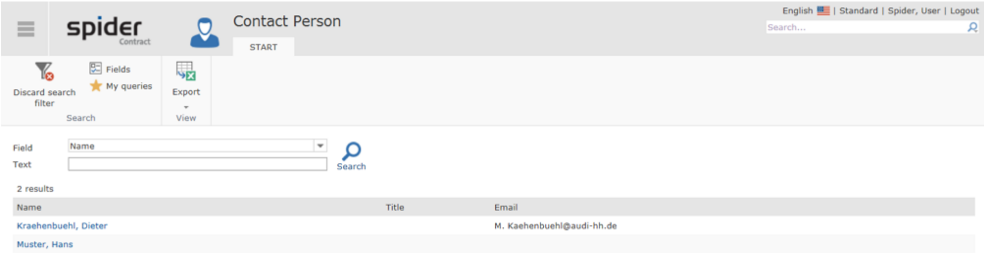
➢ Enter at least the last name and other data of the contact person and complete the input by clicking on the **Create** ribbon button.

Edit contact

- On the home page of Spider Contract, go to the menu section *Contractual parties* or to the **Back-stage** (on page 35) and select the **Contact person** menu item.



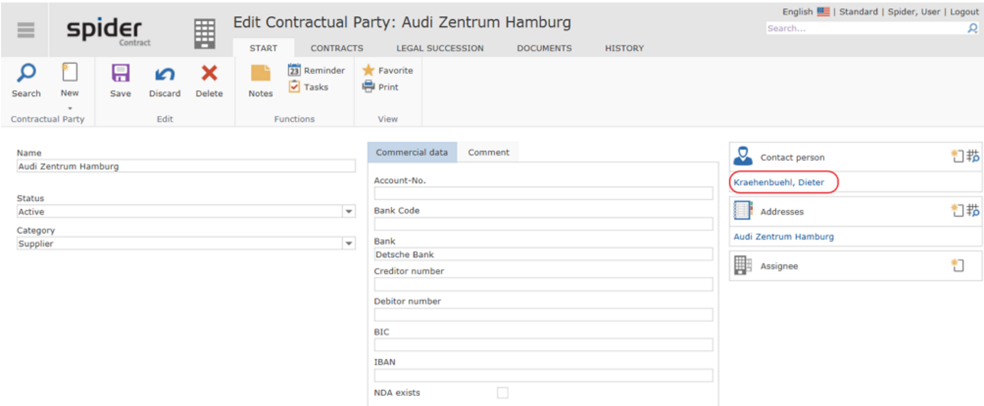
All contacts entered in Spider Contract are listed.



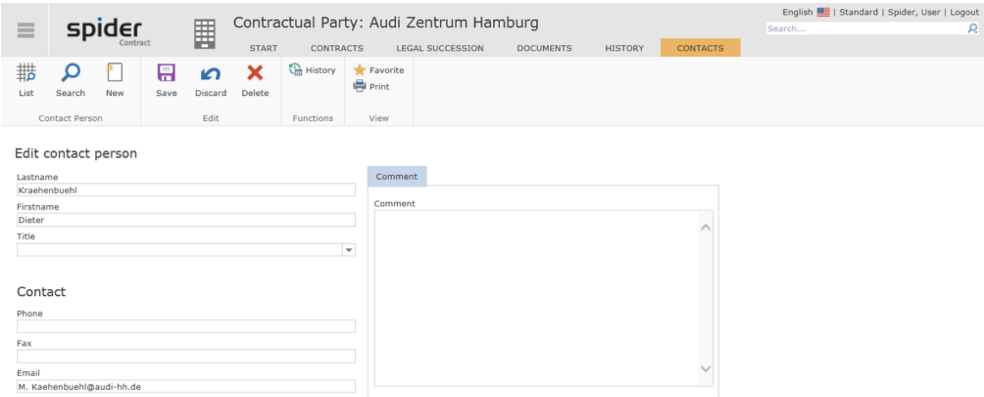
- Click on the desired contact in the **Name** column.

Alternatively, you can select the contact person on the **Edit contractual party** (see "**Edit contractual parties**" on page 262) form.

- Click on the corresponding link in the Contact object lister.



Then the *Edit contact person* form will open.



- Edit / supplement the data of the contact and complete the process by clicking on the **Save** ribbon button.

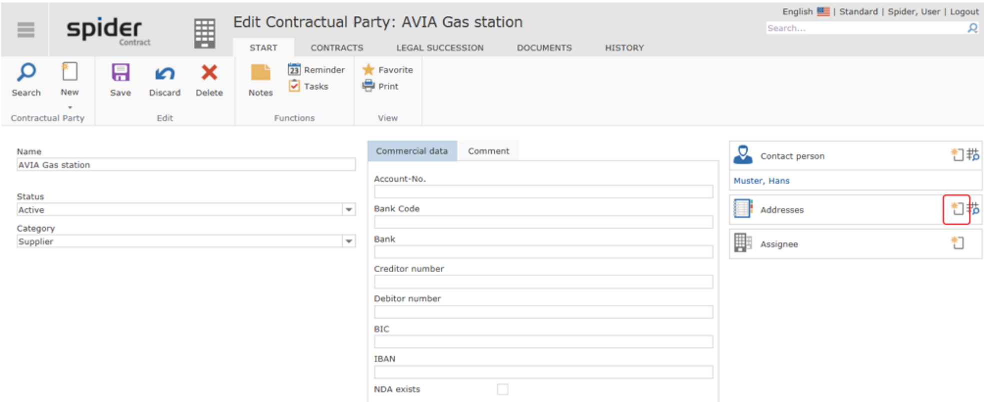
4.3.7 Addresses

The *Address* object is intended for the management of *contractual party addresses*. You can save multiple addresses for a contractual party. One address, however, will be considered as standard address.

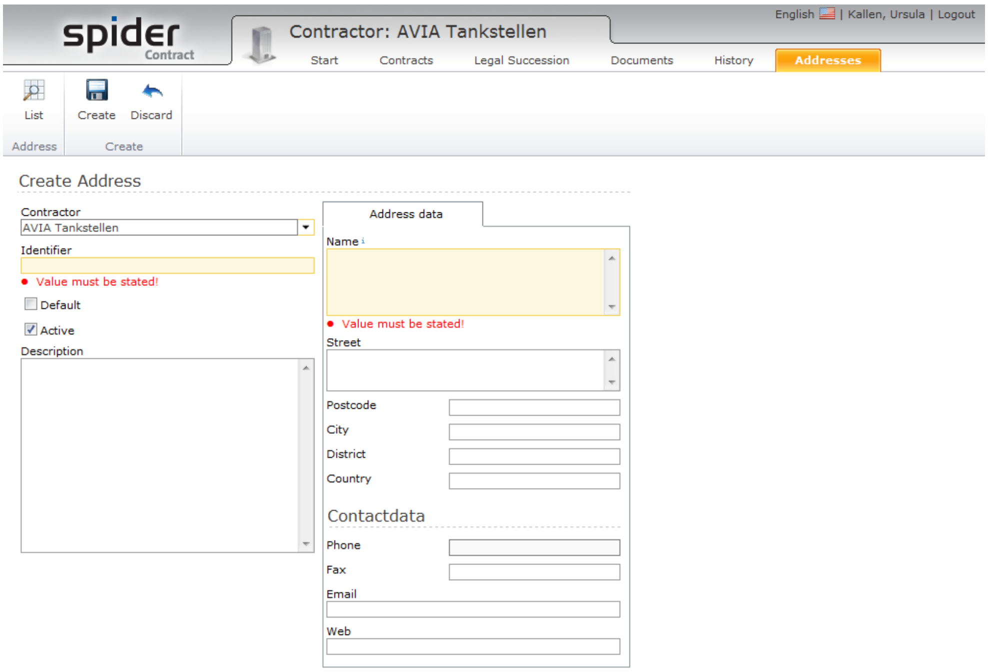
Create address

Use the **Edit contractual party** (see "**Edit contractual parties**" on page 262) form to create addresses.

➢ Click on the **New** icon in the Address object lister.



Then the form *Create address will open.*

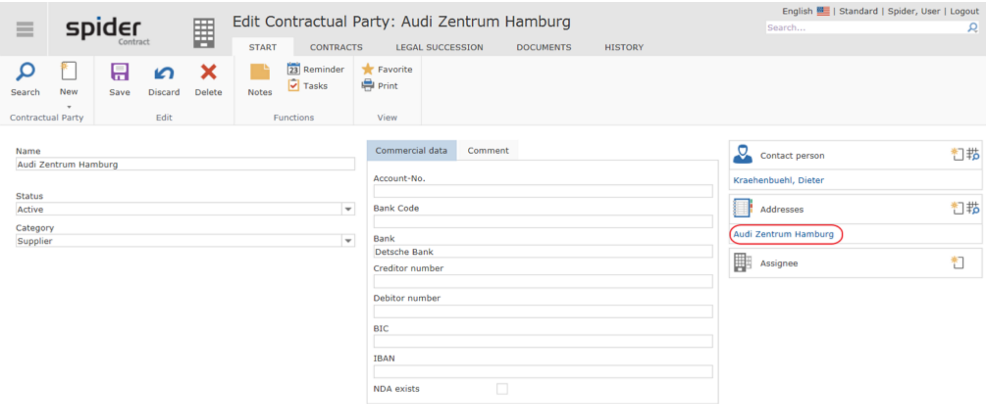


➢ Enter the identifier, name and address into the provided fields and complete the input process by clicking on the **Create** ribbon button.

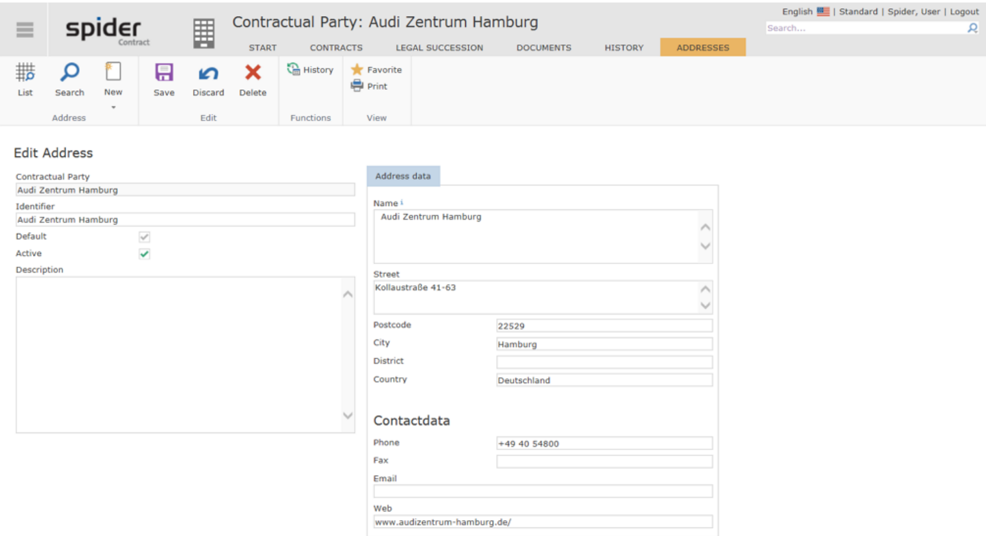
Edit address

Use the **Edit contractual party** (see "**Edit contractual parties**" on page 262) form to edit the related contacts.

➢ Click on the corresponding link in the Address object lister.



Then the form *Edit address will open.*



➢ Make the changes and complete the process by clicking on the **Save** ribbon button.

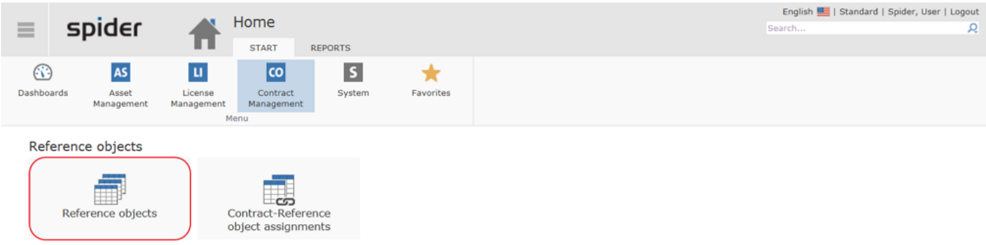
Note	The default address of a contractual party can be changed by setting *Default* for the desired address.

4.4 Reference objects

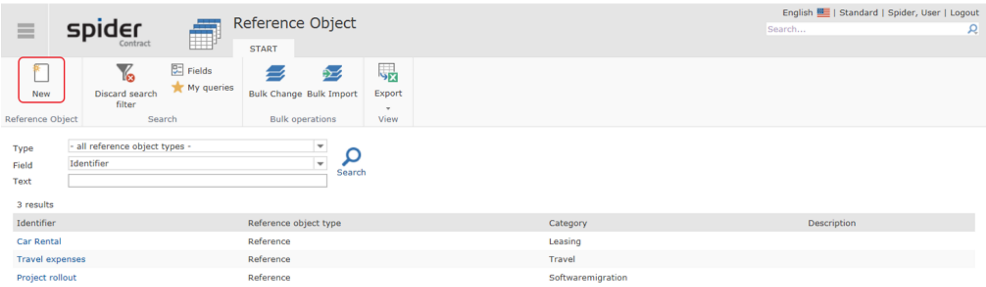
A *reference object* is used to assign various contracts to higher-level themes. Typical assignment objects are e.g., *projects*, reference objects such as *real estate, assets, etc.* Thus, you can combine contracts to theme groups as you wish. You can create groups of related contracts by assigning contracts to reference objects. A convenient evaluation of grouped contracts, for example for a project, is then possible.

4.4.1 Create reference objects

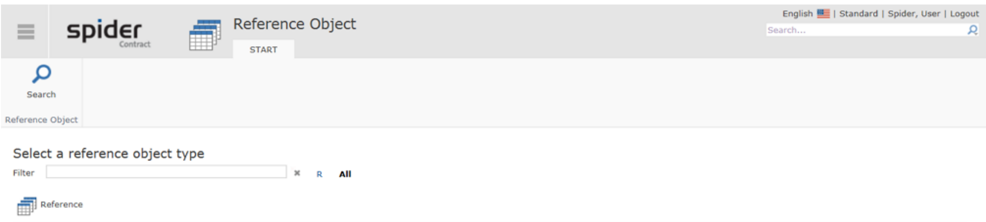
- On the home page of Spider Contract, go to the menu section *Reference objects* or to the **Backstage** (on page 35) and select the **Reference object** menu item.



- Click on the **New** ribbon button in the *Search in reference objects* form or in the *Edit form* of a reference object.



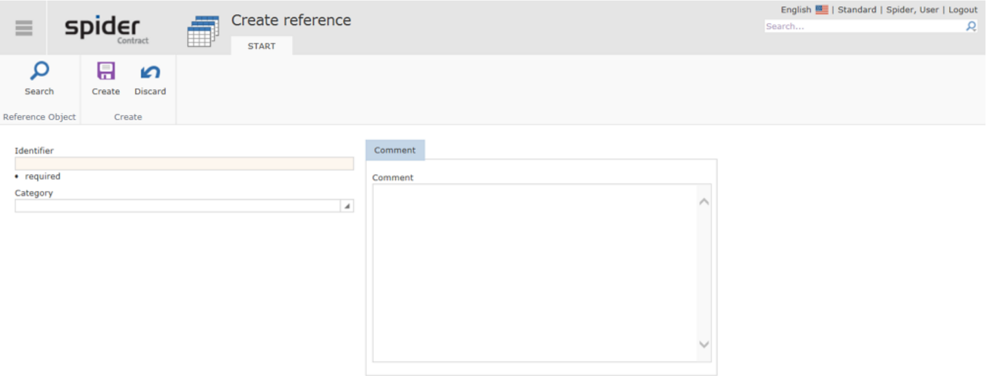
If - *all reference object types* - has been selected in the search filter type or *New: Select type* in the Edit form, the type selection is offered.



- Select the desired type if required.

Note	In the basic configuration, only the **Reference** type does exist.

The form for entering a *reference object* will open. In contrast to the contract objects, the reference object is a separate object which is created and managed independently of the contracts.

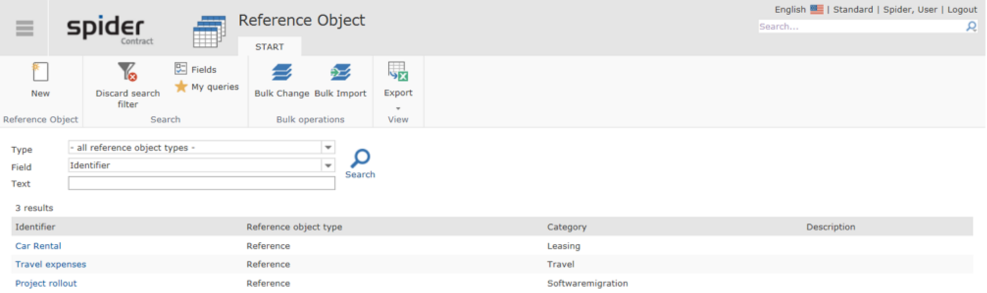


➢ Enter at least the identifier and click on the **Create** ribbon button to create the reference object.

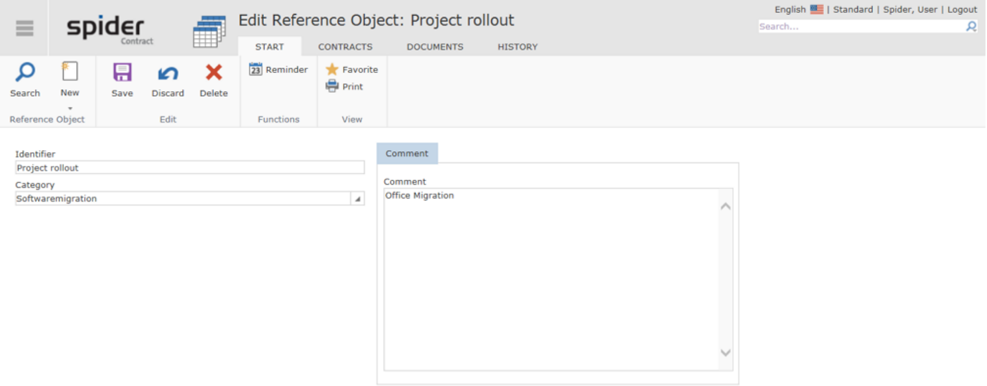
Note	As soon as the reference object is created, it may be assigned to *contracts*.

4.4.2 Edit / delete reference objects

➢ On the home page of Spider Contract, go to the menu section *Reference objects* or to the **Backstage** (on page 35) and select the **Reference object** menu item.



➢ In the Search form, click on the reference object to be edited in the column **Identifier**.



➢ After the change, click on the **Save** ribbon button to save your input.

Delete

Use the **Delete** ribbon button to delete a saved reference object. To avoid an unintended deletion of reference objects, a security message must be confirmed by the user beforehand.

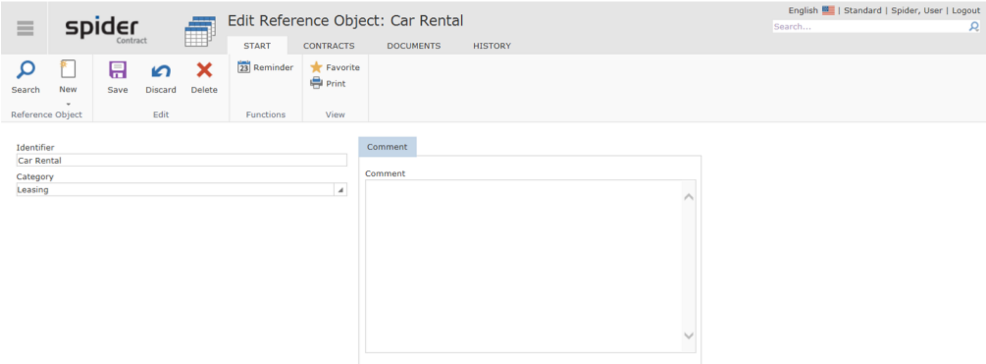
Note	A reference object is deleted after the confirmation even if it is still referenced in various contracts. This will enable you to cancel the combination of various contracts to one topic with one action.

4.4.3 Contract - Reference object assignment

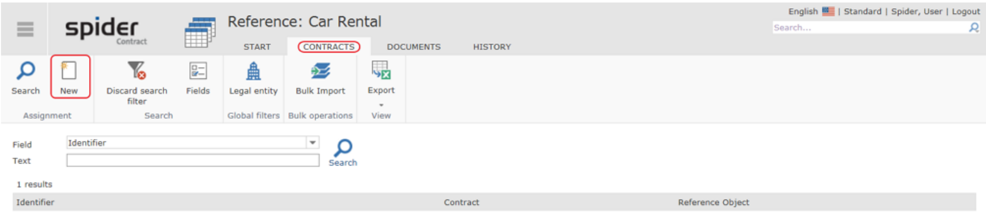
Use the *Contract - Reference object assignment* to create and manage the reference objects for a contract. You can create additional fields for the assignment to a reference object which describe the type and properties in more detail. This is an assignment of a contract to a reference object. This enables you to e.g., enter risk aspects.

Create Contract - Reference object assignments

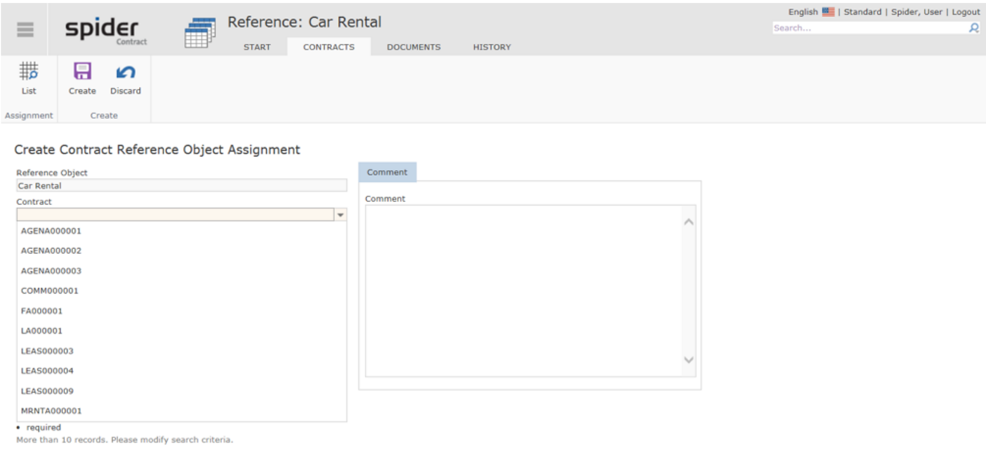
➢ Select a reference object or create a new one.



➢ Navigate to the Contracts ribbon. The list of contracts for the selected reference object is shown.

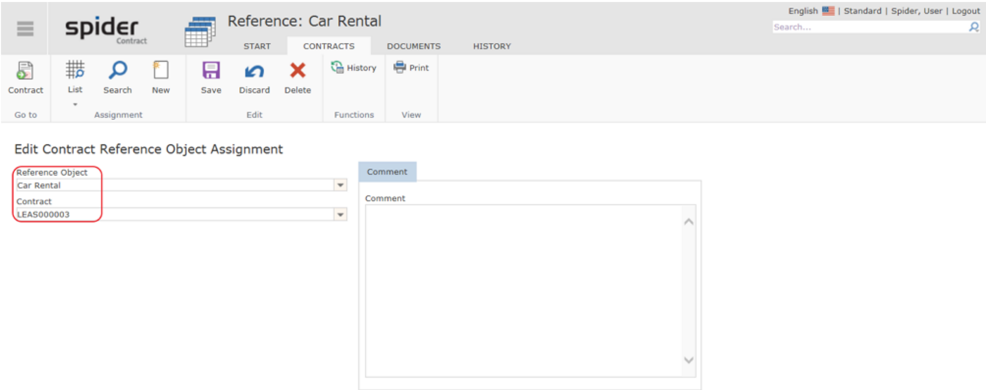


➢ Click on the **New** ribbon button.

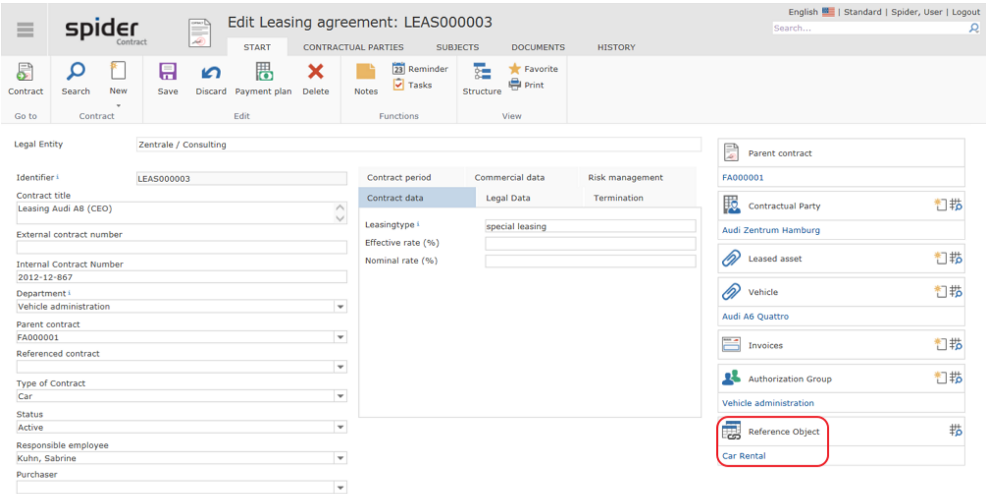


➢ Select the contract which is to be assigned to this reference object.

- Complete the process by clicking on the **Create** ribbon button.



The assigned reference objects are also shown in an object lister of the contract. This depends on the configuration.

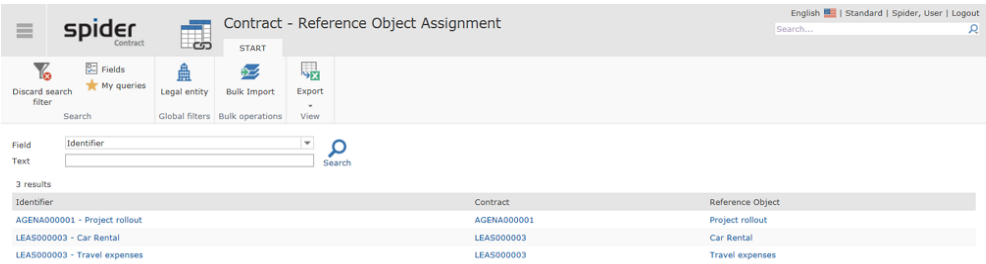


Depending on the configuration of the system, reference objects can be assigned directly to the contract.

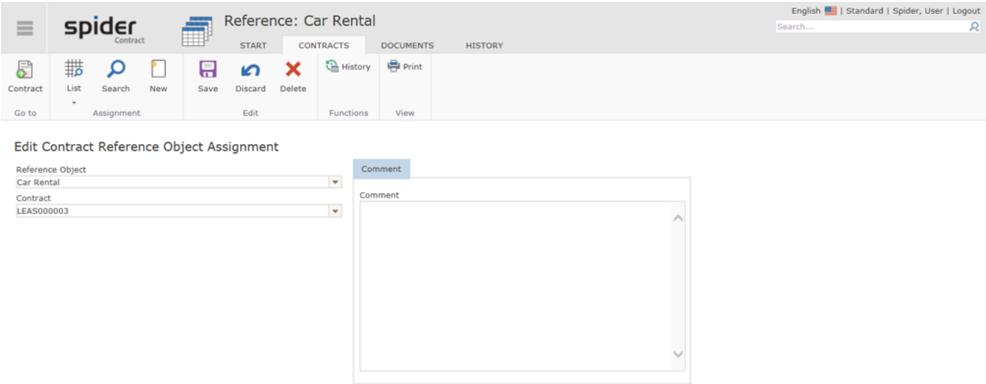
Edit Contract - Reference object assignments

- The assignments can be supplemented/changed later if you navigate on the **Start page** of Spider Contract to the menu section *reference object* or to the *Backstage (on page 35)* and select the menu item **Contract - Reference object assignment**.

The Search form of the *Contract - Reference object assignment* will open which lists all existing assignments.

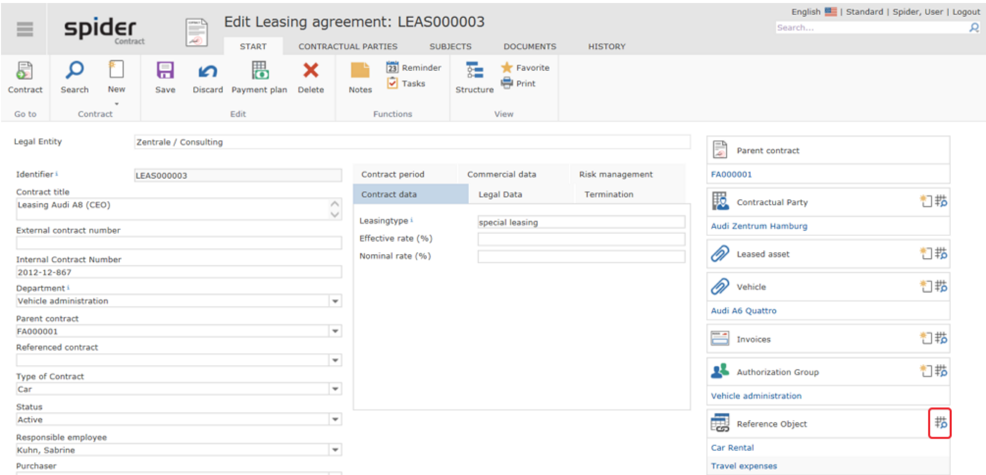


➢ Click in the **Identifier** column on the Contract - Reference object assignment to be edited.



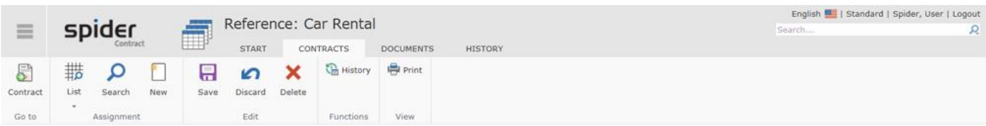
➢ Make the changes and complete the process by clicking on the **Save** ribbon button.

Another possibility to reach the Edit form of the *Contract - Reference object assignment* is the object lister of the contract (depending on the configuration).



➢ Click on the **List** icon in the object lister.

4.4.4 Navigation



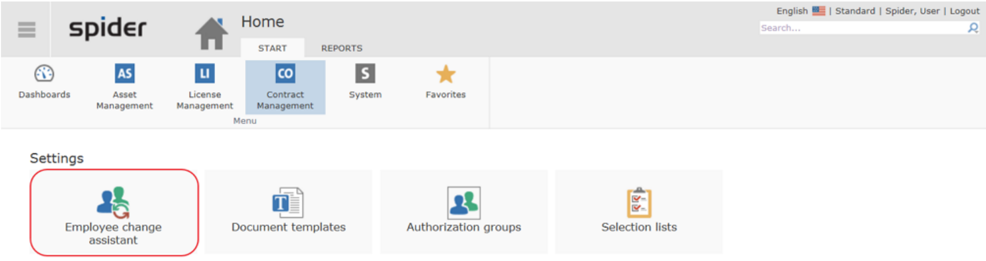
The ribbon offers you the following navigation options:

Ribbon group	Ribbon button	Function
Go to	Contract	Navigates directly to the related contract.
Assignment	List	Lists all assignments which exist for this reference object.
	Search	Navigates to the search across all Contracts - Reference object assignments.
	New	A new reference object can be created.

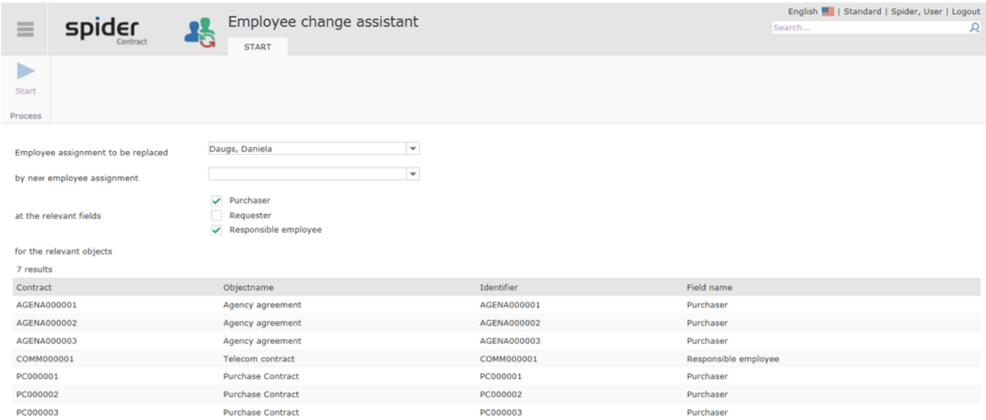
4.5 Employee Change Wizard

By means of the Employee Change Wizard, you can update employee assignments in the contract objects in a convenient way.

➢ On the home page of Spider Contract go to the menu section *Settings* or to the *Backstage (on page 35)* and select the **Employee change assistant** menu item.

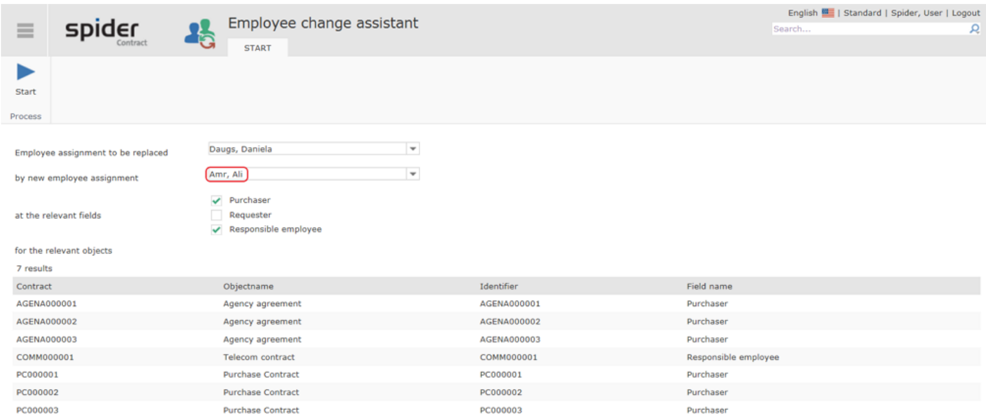


➢ Select the employee to be updated in the *Search employee* field.

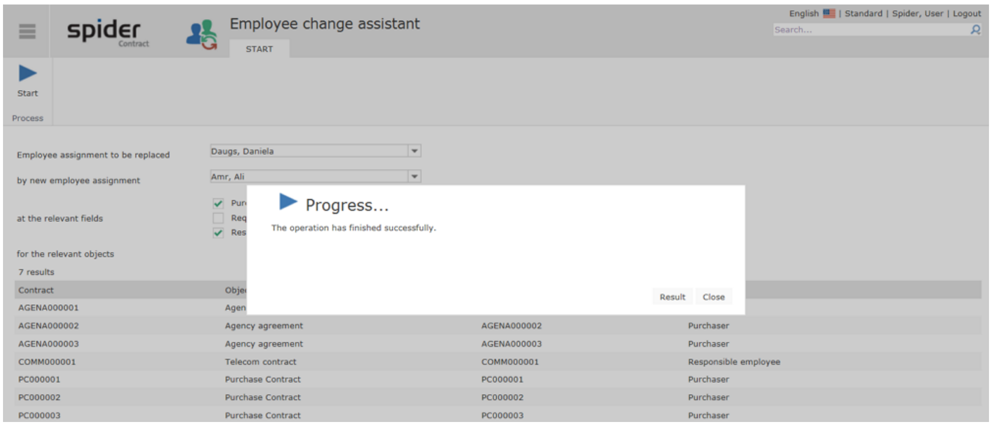


Depending on the two checkboxes *Purchaser* and *Employee in charge*, the contract objects are listed in which the searched employee is entered as purchaser or employee in charge.

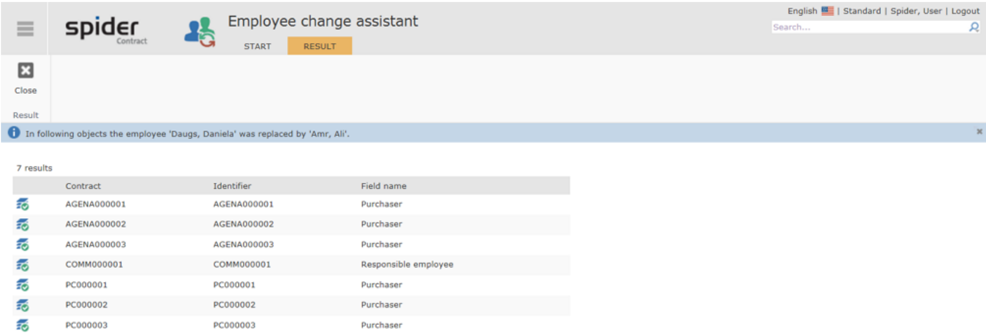
➢ Select the employee in the *Replace by employee* field who is to be assigned instead of the previous employee.



➢ Click on the **Start process** ribbon button to run the Employee Change Wizard.



The status is shown in the progress indicator and after successful processing, the result can be shown.



CHAPTER 5

General functions

Spider offers several general functions. In the following chapters, the handling of these functions is explained in detail.

General functions include:

- document files for managing documents for a Spider object,
- the different histories,
- reminders for e-mail-based recalls,
- automated E-mail reports and
- the print view.

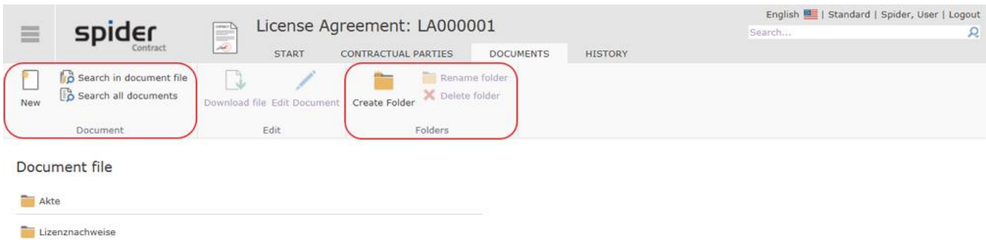
5.1 Document files

You can save and manage files (electronic documents) for a Spider object in a document file. Various file formats such as PDF, Office or graphic documents are supported. Extensive document files with many documents can be easier subdivided and structured using a folder structure. You can nest the folders to any depth you need. Files can be uploaded directly in a folder which has been previously selected. There are supplementary fields in Spider for the management of documents. Depending on the product licensing, more functions will be available such as a full text search or a version management of the file states.

➢ Open a Spider object. You will reach the document file by clicking on the **Documents** ribbon.

The visibility of the document file depends on the system configuration and your permissions. If you do not see the Documents tab, the functionality is not available for the Spider object.

The document file shows the folder structure with the saved documents. If neither documents have been uploaded nor any folder has been created yet, the document file will be empty. In the ribbon of the document file, there are several functions available for e.g., uploading a new file and adding a folder.



Ribbon group	Function	Description
Document	New	Use this function to upload files into the Spider system.
	* Search in document file	This function searches the documents within the selected document file (full text search).
	* Search all documents	This function carries out a full text search across all document files within a Spider module.
Folder	Create folder	You can create a new folder in the section document file.
	Rename folder	Renaming the currently selected folder.
	Delete folder	Deleting the currently selected folder if it does not contain documents.

* The advanced functions of the document management depend on the licensing for the Spider system. If there is no license, these functions are not available.

Note	If the documents are managed in a third-party system (document management system - DMS, ECS), the functionality of the document file is not available.

5.1.1 Manage folders

For big document files, folders can be created for a better structuring and overview.

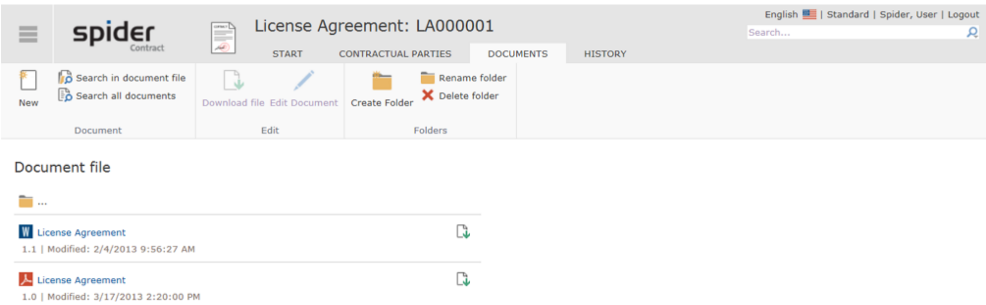
- ➢ For creating a new folder at the current position in the document file, click on the **Create folder** button in the Folders ribbon group.
- ➢ A dialog is opened. Fill in the desired name and confirm your entries with **Create**.

The folder will be shown in the navigation list of the document file. You can create other folders or select one folder.

- ➢ Go to a folder by selecting it in the document file using the mouse.

The folder will be opened. The included subfolders and possible documents are listed. For the current position in the document file (selected folder) please refer to the path string below the document file. Folders can be nested to any depth you need.

- ➢ To go up one folder level, click on the first folder ...
- ➢ Alternatively, you can select one folder from the path string of superior folders. If you want to go up more than one level, this way is recommended.



You can rename a folder. The folder names are not translated by Spider and will always be output with their original name.

- ➢ Navigate to the desired folder in the document file. Click on **Rename folder** in the Folder ribbon group.
- ➢ A dialog is opened. Change the folder name and confirm your entries with **Rename**.

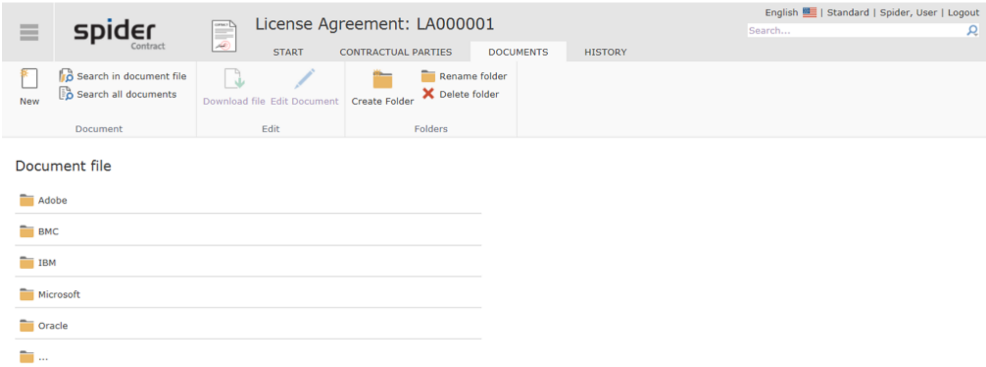
Only empty folders can be deleted. Subfolders or documents which are still in the folder must be deleted beforehand.

- ➢ Navigate to the desired folder in the document file. Click on **Delete folder** in the Folder ribbon group. Please note that only empty folders can be deleted.
- ➢ A dialog with a security prompt is opened. Confirm this prompt with **Delete**.

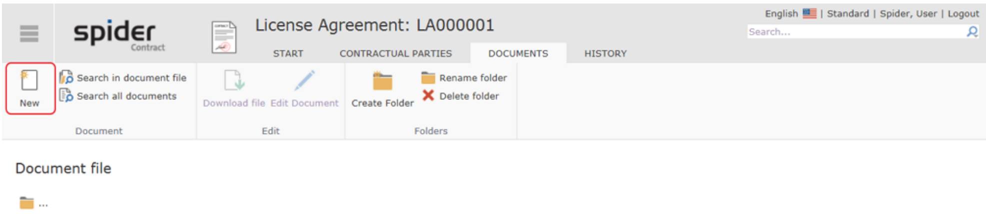
5.1.2 Upload documents

- ➢ To upload a file (electronic document) into the document file, please open the document file for a Spider object.

- Navigate to the folder in which you want to create the document. The folder must be selected before uploading the document.



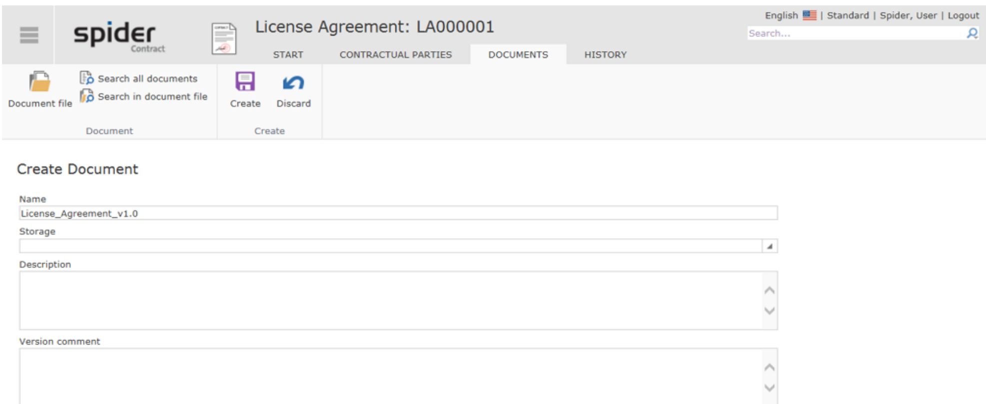
In the example, the Oracle folder is selected.



- Click on the **New** button in the Document ribbon group.

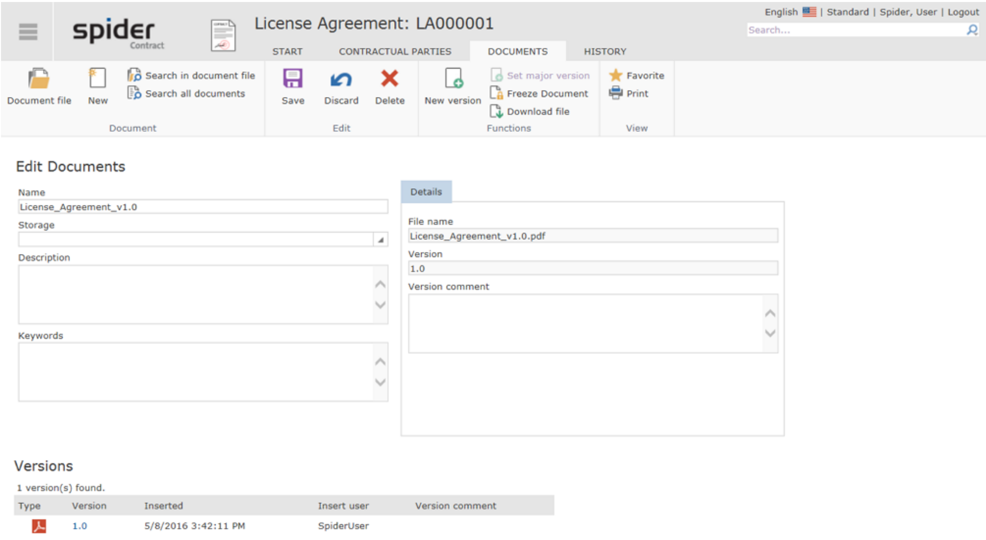
- Select the path to the document which is to be uploaded.

Note	The upload process starts automatically.



Before the document is saved, you can enter supplementary information. The available selection of the fields is determined in the system configuration. For example, you can enter the storage location of the original document or a description.

➢ Click on **Create** to complete the action.

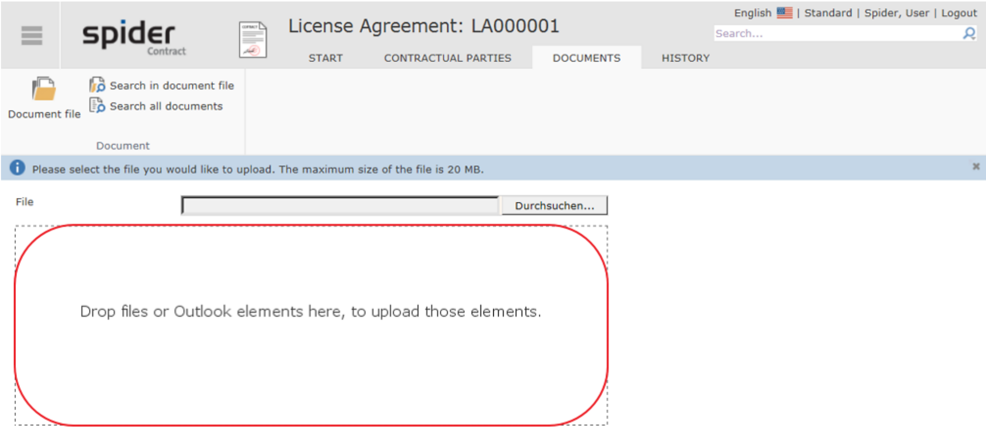


Note	Common file formats such as PDF, Office or graphic formats are supported. However, potentially hazardous contents such as JavaScript and EXE files cannot be uploaded. The scope of the supported file formats is determined in the system configuration.

5.1.3 Upload documents per Drag & Drop

Uploading documents per Drag & Drop is only available if the advanced document functions are licensed. As described in the section above, go to the ribbon **Documents** and navigate to the document file in which the document is to be uploaded.

➢ Click on the **New** button in the ribbon group Document.



If the Drag & Drop function is active, you will be prompted to drag the file into the marked area. Apart from loading files from the file system, also the direct receipt of e-mails or e-mail attachments from Microsoft Outlook is supported. Use the mouse to drag the desired files or Outlook elements directly to the framed drag & drop area. If a file should not be accepted, a corresponding message will be shown.

Note	The upload process starts automatically.

After a successful upload, other meta data must be entered or confirmed depending on the document. The process is identical to the already **described** (see "**Upload documents**" on page 278) process for the file upload.

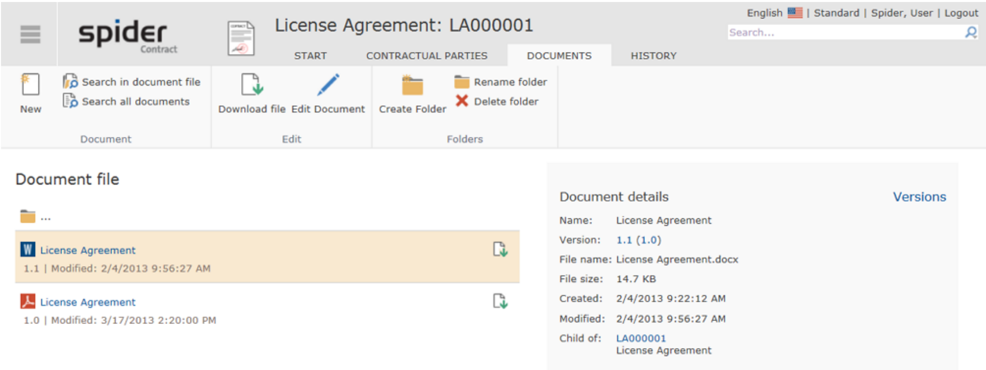
Note	If multiple files are to be uploaded with one Drag & Drop action, the meta data must be entered or confirmed for each file. After completion of the last file, the document file is shown.

5.1.4 Show documents

There are several display options for the documents:

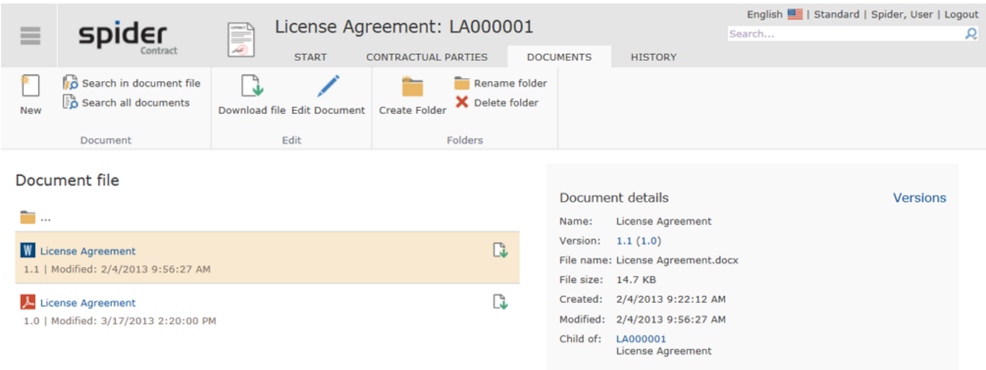
- To open the saved filed directly, click on the **green arrow** (right) in the document list of a folder. The file download starts automatically.
- Click on the document title to open the Edit form of the document. Here, you can edit fields or upload a modified file for the document.
- If you want to see details of the document without going to the Edit form of the document, you can select the document. As soon as you move the mouse above a document entry, it will be shown with a blue background. Click on the document entry in the list to select the document and highlight it in yellow. For the selection, you must not click on the document title (blue link) or on the download icon.

If the document is highlighted, details will be loaded and shown on the right side of the navigation bar. The name, the current version (in case of version management), the file size as well as the creation and editing date are shown.



5.1.5 Edit the document

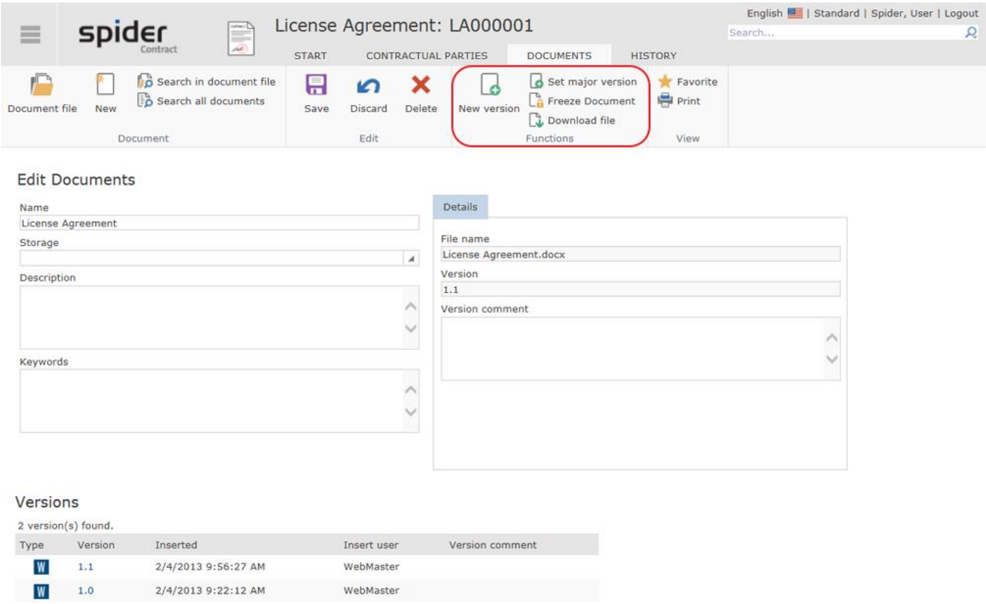
- Open the **Document file**, by clicking on **Documents** in the **Ribbon** of a Spider object.
- Select a **Document** by **navigating to a folder** if required.
- To edit a document, click directly on the document title.
- Or mark a document and click on **Edit Document** (pencil) in the ribbon group Edit.



The Edit form will open in which you can modify the document data. The scope of the fields is determined in the system configuration. These settings can be enhanced or modified.

Use **Keywords** to enter terms, which will be searched by the full text search. If the full text search is not enabled, input in this field is not possible.

The **Version comment** applies for the current file. If a new file is uploaded, the existent file and the version comment are moved to the version history. For older versions, you cannot modify the version comment anymore. The version management is a part of the enhanced document management functionality. If not enabled, input in this field is not possible.



➢ Click on the **Save** button to save your input.

In addition, the following functions are available:

Ribbon group	Function	Description
Functions	* New version	Uploads a new version. Select the file which is to be uploaded.
	* Set major version	Use this button to declare a version as major version.
	Freeze Document	The document is locked and cannot be modified anymore. You first must unlock the document before document fields can be modified or another file can be uploaded.
	Download file	Download of the current file version.
Editing	Save	Saving the modifications.
	Discard	Discard your entries.
	Delete	Deletes the document.

* The advanced functions of the document management depend on the licensing for the Spider system. If there is no license, these functions are not available.

5.1.6 Version management

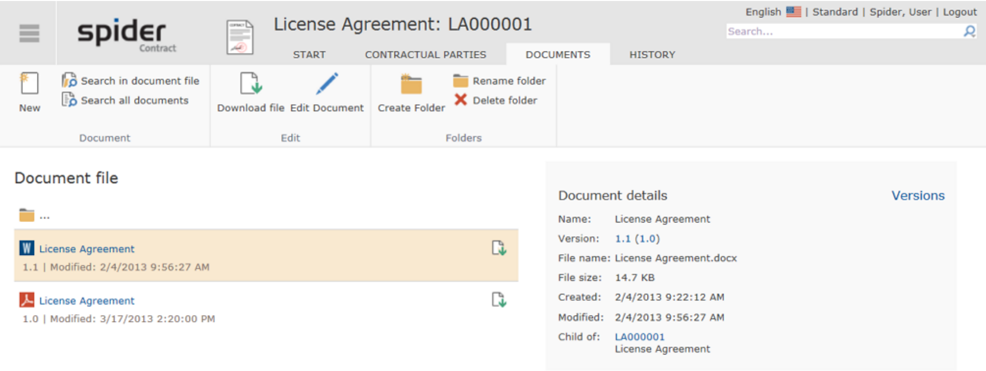
Different file states are called versions. The version management is a function of the advanced document management. You can upload the state of a file related to a document. Without version management, the file is overwritten. The version management protects the file against overwriting. When a new file is uploaded, the previous file will be moved to the version history. This function is available for each document. You have access to older versions at any time and can open the files.

A new version is only created if a modified file is uploaded for a document. The version counter automatically updated by Spider. The version consists of a major version and a minor version. The first file has always version 1.0. By default, the minor version is increased by 1 (1.1, 1.2, 1.3, etc.) with each modified file which is uploaded for a document.

When uploading a file, you can decide at once, whether a new major version shall be created. In this case, the next major version will be created (2.0, 3.0, etc.). A document which has been created as minor version (e.g., 1.3) can later be changed into a major version by using the **Set major version** function.

A version comment can be entered for the current version. Together with the file this comment will be moved to the version history and cannot be modified after that. Also, for the full text search only the current file versions will be considered.

If you execute the file download for a document, the most up-to-date file version will be returned. You can start the file download using the document, the document file, or the full text search. You have access to older versions only by using the version list.



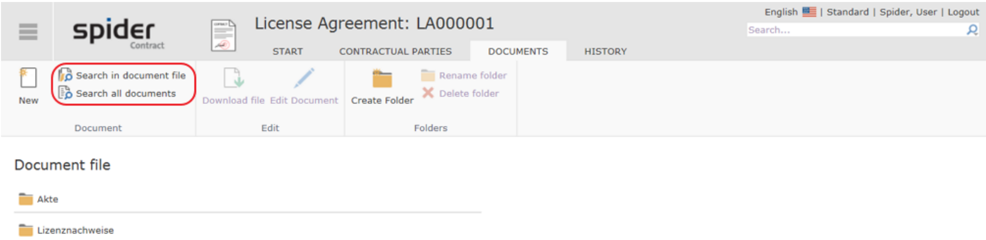
The document details give you direct access to the last major version if the current file version is a minor version. In the example, the version is currently 1.1 and version 1.0 is offered directly for download.

- By clicking on the **Versions** link in the upper right corner of the detail view, the versions of the selected document are shown. The shown files can be opened directly.

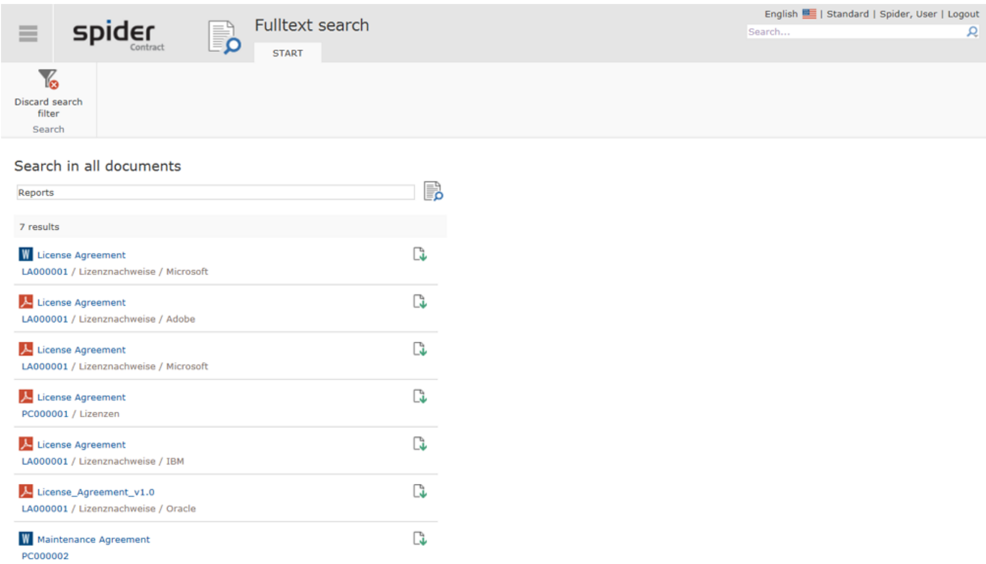
5.1.7 Full text search

Use the **Full text search** to search the content of the uploaded files. The full text search requires the advanced document management functionality and must be licensed. If this is missing or if the full text search is disabled, the function will not be displayed.

To use the full text search, the text content in the files must be searchable. This is the case for Office documents and many PDF files. An original PDF document with scanned content, however, cannot be searched if the pages are saved as pictures (images). To be searchable, the file must run through an OCR capture system and be converted into a searchable PDF document. This conversion is offered by some Scanners and special software. Also, image files (JPG, TIFF, etc.) cannot be searched by the full text search.
Furthermore, the file formats must be supported by the full text search. The scope of the supported file formats depends on the installation and the used systems. There are supplementary packages (filters) for some file formats to make them usable for the full text search. An administrative page (information about full text search) shows the currently searchable file types in the Spider system. If content cannot be searched, the preconditions must be checked: Is the file type supported by the full text search? Is the content searchable?



Using the full text search is very simple. Enter your full text query into a search field. Spider searches the documents and lists the results. The full text search can be executed in all documents of a Spider module or only for a selected document file. If the full text search is restricted to one document file, all searchable documents of the document file are searched. A cross-module full text search is not supported.



The following restrictions apply for the input of search terms:

- The individual search terms are linked with a logical "OR".
- The sequence of the individual search terms is not important. The content is checked for individual words.
- Search terms which have been put in quotation marks (") will be searched as expression. You can also enter several words or whole sentences. The sequence within the quotation marks is relevant for the search.
- Placeholders (*) can only be used in very limited way. The search must be put in quotation marks. Furthermore, the placeholder can only be used at the end of the expression. Otherwise, the character * will be searched.

Apart from the file contents, the full text search will also search the following fields of the documents:

- Name: Document title
- File name: Name of the original file
- Keywords: Specification of various keywords in the document

5.2 History

You can select among several adaptable history functionalities for the Spider objects. Histories will be written if an object is modified. The modifications will be logged and can be evaluated in different ways. In the object history, all fields are saved (object status) as soon as the object is modified. You can view them in a summary or in a comparison of 2 modification times. The history of an object can be archived for a certain, freely definable period. The definition of this period will be carried out during the system configuration and may therefore vary. For the history filing of field changes, the modifications of selected fields are logged.

Use the History ribbon to view the saved modifications.

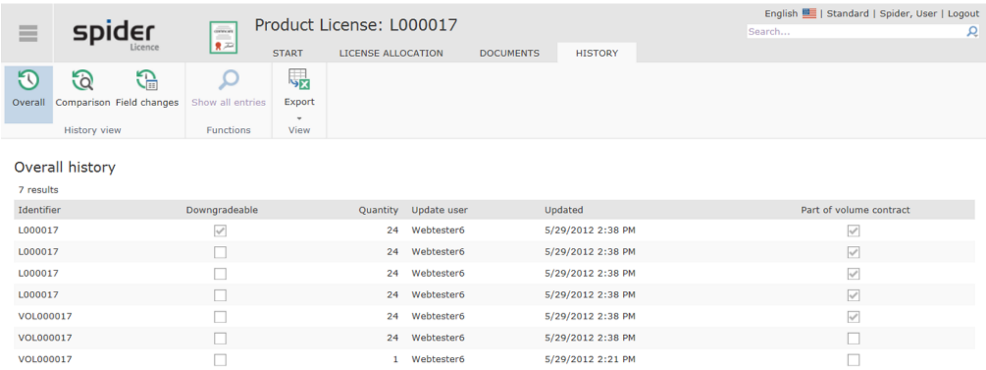
- To go to the history data, click on the **History** ribbon in the corresponding Spider object.

If the History ribbon is not shown, you either have no permission or no history has been set up for the object.

The history view of the selected Spider object will open. You can select from different views of the history data via the **History view** ribbon group. The options are described in the following sections.

5.2.1 Overall

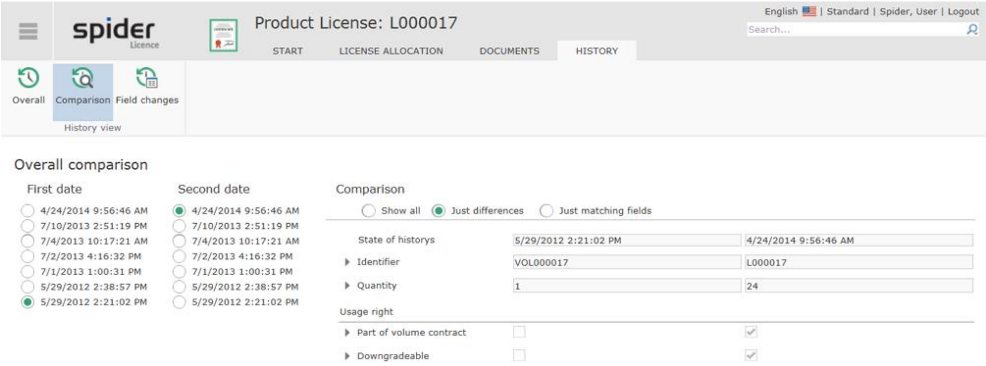
If an object is enabled in Spider for the history functionality, a history entry is written for each use of the save function. The overall view contains all columns which have been modified. Only those columns are displayed which you are authorized to see. You cannot use filters in the overall view. The results may be exported.



Example from Spider Licence.

5.2.2 Comparison view

In the comparison view, you can select two different change states from the history data for comparison.

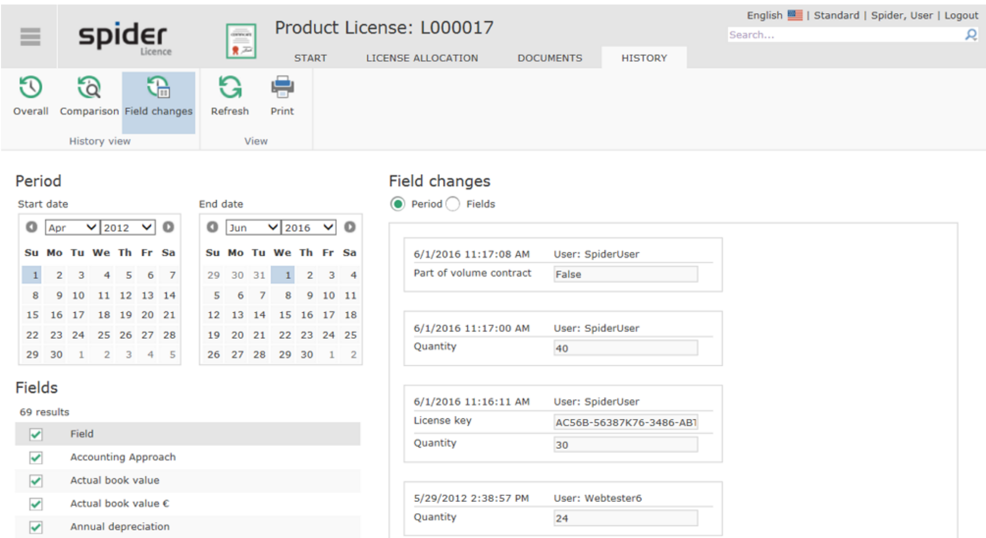


Use Comparison to view and compare the field contents of the two selected history states. Depending on the selection criterion, either **All** fields, **Just differences** or **Just matching fields** are shown with their values. You can see only the fields which you are authorized to see and which you also see in the Edit form. If two states are compared and all fields are indicated as identical, changes have been made to fields which you cannot access.

5.2.3 Field changes

The logging of field changes is another functionality which is totally different from the overall and comparison view. Use the system configuration to switch on or off the change logging per field. Usually, change logs for fields are required for evaluation purposes. Also, you can use the change logs to send automatic e-mail notifications as soon as fields are modified or predefined values are set, e.g., if a status is reached or a risk assessment is changed. The automatic e-mail notifications must be set up by an administrator.

You can retrieve the **Field changes as soon as** the logging for at least one field of the object has been enabled. This history view offers you the option to filter and view field-level changes for a defined period.

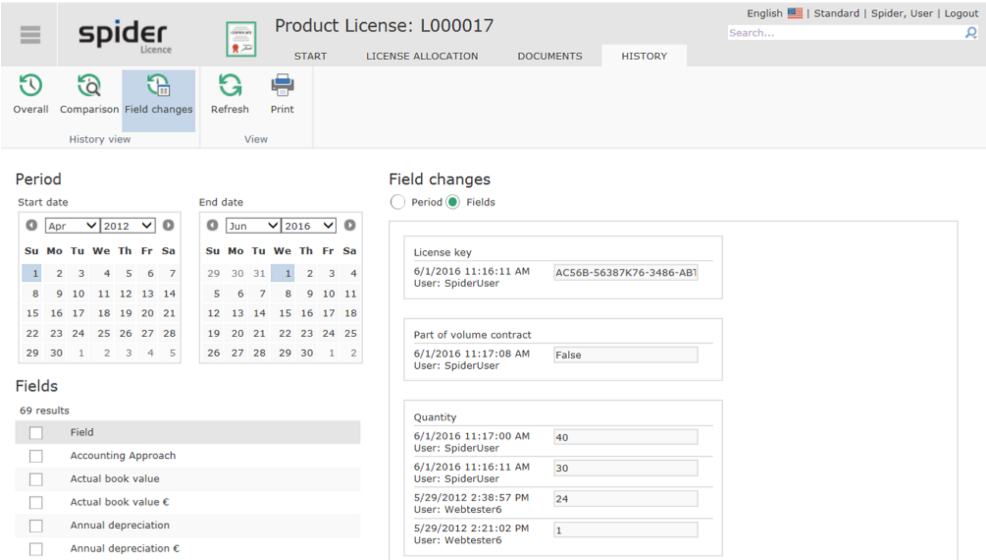


Under **Period**, enter the **Start** and **End date** for the period, which shall be checked for field changes.

Under **Fields** select the fields, for which you want to display field changes. By default, all fields are selected which have the logging turned on.

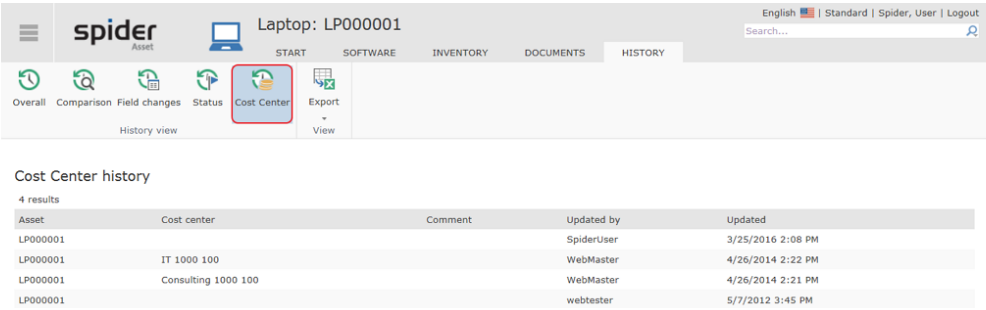
After you have made a new selection, press the **Refresh** ribbon button.

You can select two views for the output. The view per **period** shows the field changes for each change time. Switch to the **Fields** view to show the changes grouped by field.



5.2.4 Cost center history

The cost center history can be called in the Edit form of an asset or function unit object via the History ribbon, if the **Cost center** button can be selected in the History view ribbon group.



Asset	Cost center	Comment	Updated by	Updated
LP000001			SpiderUser	3/25/2016 2:08 PM
LP000001	IT 1000 100		WebMaster	4/26/2014 2:22 PM
LP000001	Consulting 1000 100		WebMaster	4/26/2014 2:21 PM
LP000001			webtester	5/7/2012 3:45 PM

All assignments of cost centers which have been made during the entire life cycle can be listed with indication of the change date and the name of the editor.

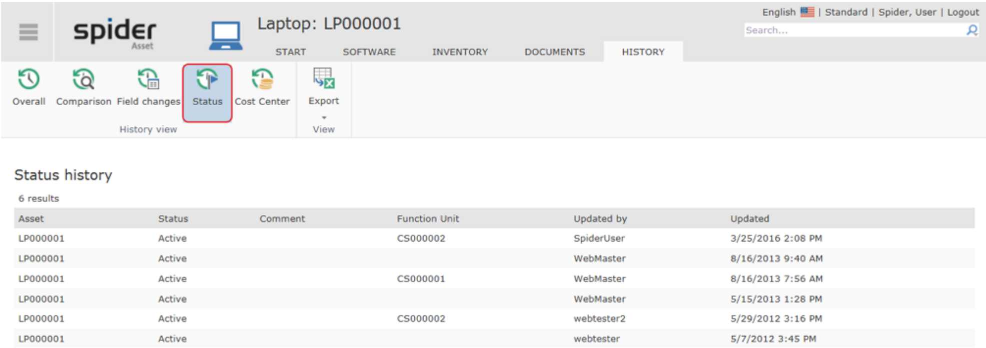
Note The history can be exported into an Excel or CSV file. Click on the desired button to start the corresponding export.

5.2.5 Status History

The status history can be called from various Spider objects. In Spider Asset, these are the following objects: *Asset* and *Function unit* and the following objects in Spider Contract: *Contract*, *Subject of the Contract* and *Contractual parties*.

➢ Navigate to the History ribbon in the corresponding Edit form.

➢ Click on the **Status** button in the *History view* ribbon group if available.



All status changes which have occurred during the entire life cycle are presented in chronological order. Furthermore, you can see the assigned user which has carried out the change as well as the corresponding change date.

Note	The history can be exported into an Excel or CSV file. Click on the desired button to start the corresponding export.

5.3 Reminder

The reminder allows the user to send a resubmission related to a Spider object as an e-mail at a certain point of time. For example, you can send recalls or delegated tasks by means of the reminder. Reminders are saved in Spider. Use the search function to filter, show and change reminders if required.

Reminders are a functionality which is available in each Spider module for defined objects such as **contracts**, **assets,** or **licenses**.

- ➢ To search for reminders belonging to a specific object, click on the **Reminder** (1) ribbon in the Functions ribbon group of the Spider object.
- ➢ To create reminders, click on the **Create Reminder** (2) ribbon in the Functions ribbon group of the corresponding Spider object.

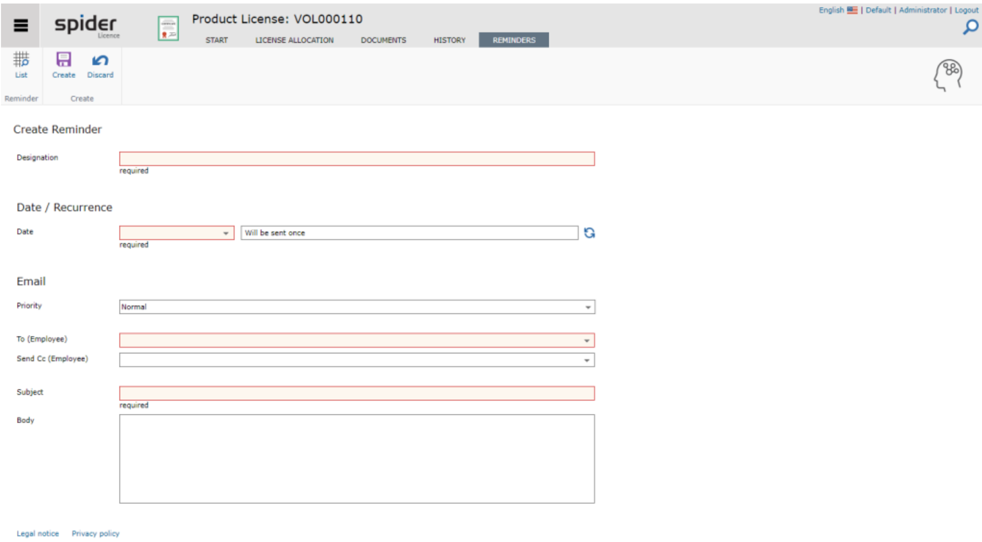
Note You can open the search function via the home page or via the **Backstage** (on page 35) by clicking on the menu item Reminders of the corresponding Spider module.

Reminders can be disabled in the system configuration for individual Spider objects. If you cannot open the Reminder function, you may not have the permission.

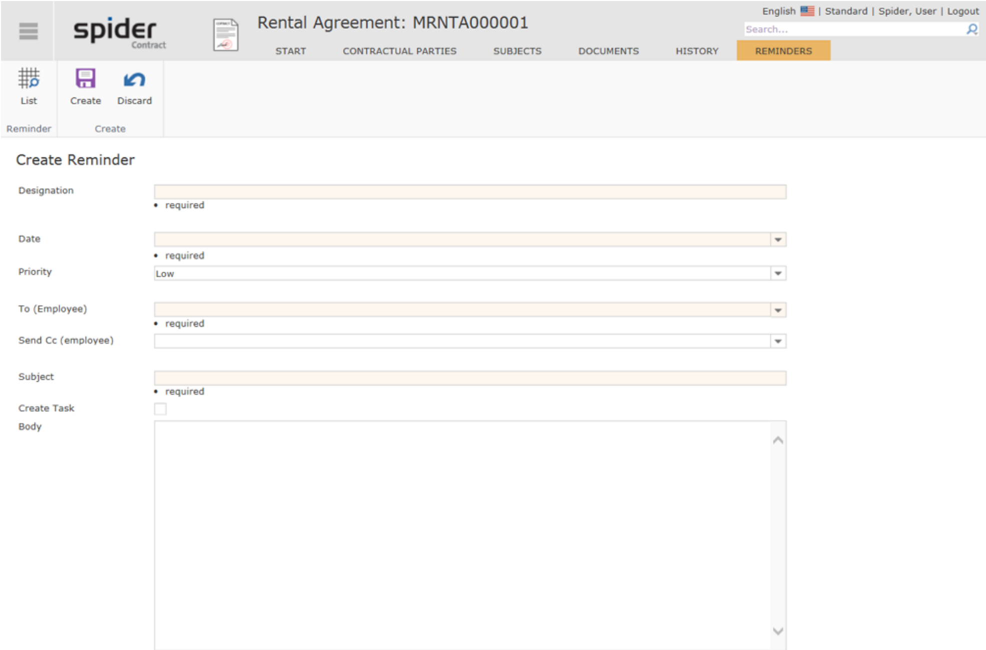
5.3.1 Create reminders

- ➢ To create a new reminder, open the desired Spider object, e.g., a license.
- ➢ In the **Functions** ribbon group, click on the **Create Reminder** (2) button.

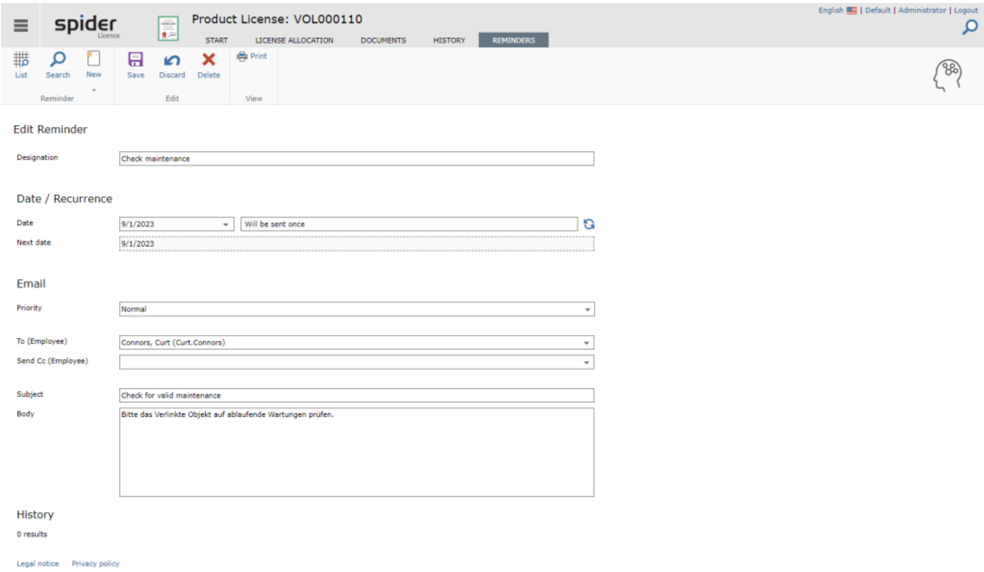
The form for creating a reminder will open.



Mandatory field	Description
Description	Title of the resubmission.
Date	At least the first date of the resubmission must be selected.
To (employee)	The recipient of the resubmission. **Important**: The selected employee must have a valid email address for a successful resubmission.
Subject	Text to be used in the subject line of the resubmission email.



➢ After filling in the form, click the **Create** ribbon button to save the new resubmission.

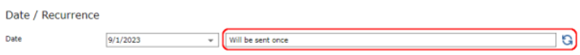


Spider automatically sends an e-mail to the set employees, with the message entered in the Content field. A hyperlink to the Spider object is added to the email body so that the recipient can navigate to Spider directly from the email.

The **Next date** field shows the calculated time when an email will be sent. If the field is empty, no message will be sent. In this case, check if the date of execution is in the future. This field becomes more important for resubmissions that are sent repeatedly. More about this in the next chapter.

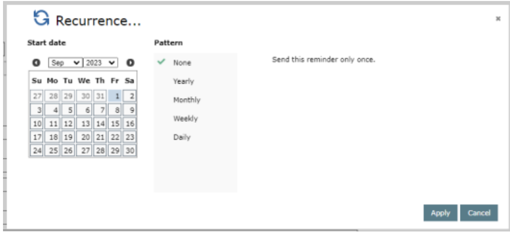
5.3.2 Create recurring reminders

Resubmissions can be sent multiple times in intervals. This requires a click in the Date/Recurrence area.



➢ Click on the text box or the blue arrows.

A dialog opens that offers multiple patterns on how frequently the mail is send.



Choose the desired interval and close the dialog with **Apply** to save the data or discard the dialog with **Cancel**. For more details about the interval patterns see the corresponding following chapters:

Pattern “None”

Used to send standard Reminders.

- Choose **None** from the pattern list.

No recurrence, the reminder is sent once on the **Start date**.

Pattern “Yearly”

Sends a message every X Years

- Choose **Yearly** from the pattern list.

More options appear on the dialog:

The sending date is derived from the **Start date**. Define if you want to receive a Message every year or wider intervals. Spider offers the option to bring forward the send date if the calculated send date would be a Saturday or Sunday. In this case the Reminder will be sent on the Friday before.

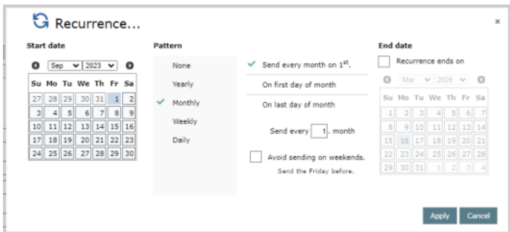
If you choose to define an End date, no Reminders will be sent after this day.

Pattern “Monthly”

Sends a message every X Months

- Choose **Monthly** from the pattern list.

More options appear on the dialog:



The sending date is derived from the **Start date,** but you can also choose the first or the last day of the month. Define if you want to receive a Message every month or wider intervals. Spider offers the option to bring forward the send date if the calculated send date would be a Saturday or Sun-day. In this case the Reminder will be sent on the Friday before.

If you choose to define an End date, no Reminders will be sent after this day.

Pattern “Weekly”

Sends a message every X Weeks

- Choose **Weekly** from the pattern list.

More options appear on the dialog:

The sending day is derived from the **Start date** day. Define if you want to receive a Message every week or wider intervals.

If you choose to define an End date, no Reminders will be sent after this day.

Pattern “Daily”

Sends a message every X Days

- Choose **Daily** from the pattern list.

More options appear on the dialog:

Sending begins with the **Start date**. Define if you want to receive a Message every day or wider intervals. Spider offers the option to bring forward the send date if the calculated send date would be a Saturday or Sunday. In this case the reminder will be sent on the Friday before.

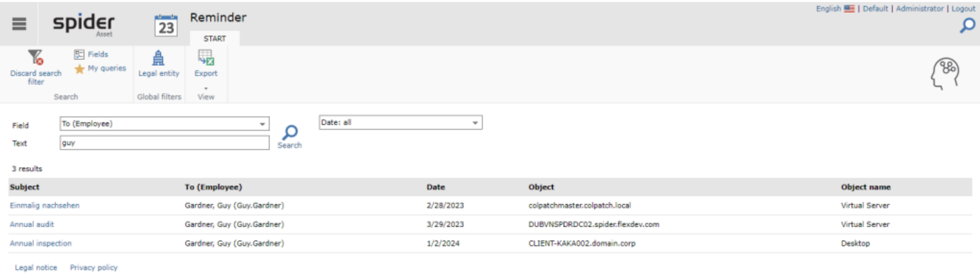
If you choose to define an End date, no Reminders will be sent after this day.

Note	The algorithm adds the Reminders to the Email-Queue only once a day.

5.3.3 Edit reminders

- To edit reminders, click on the **Reminders** (1) ribbon in the Functions ribbon group of the corresponding Spider object. The list of reminders for the selected object will open.
- You can start a search across all reminders in a Spider module by going to the home page of the Spider module and click on the menu item **Reminder**. Alternatively, you can select the corresponding Spider module in the **Backstage** (on page 35) and click on the menu item Reminder.

By means of the **Field search** you can search for certain reminders. Use the **Display filter** to restrict the search to your own reminders or to display all saved reminders - also those entered by other users. The **Date filter** allows you to filter for certain time periods such as last, current, or next quarter.



- Click on the reminder to be opened or edited.
- After editing the data, click on the **Save** ribbon button to save your entered data.

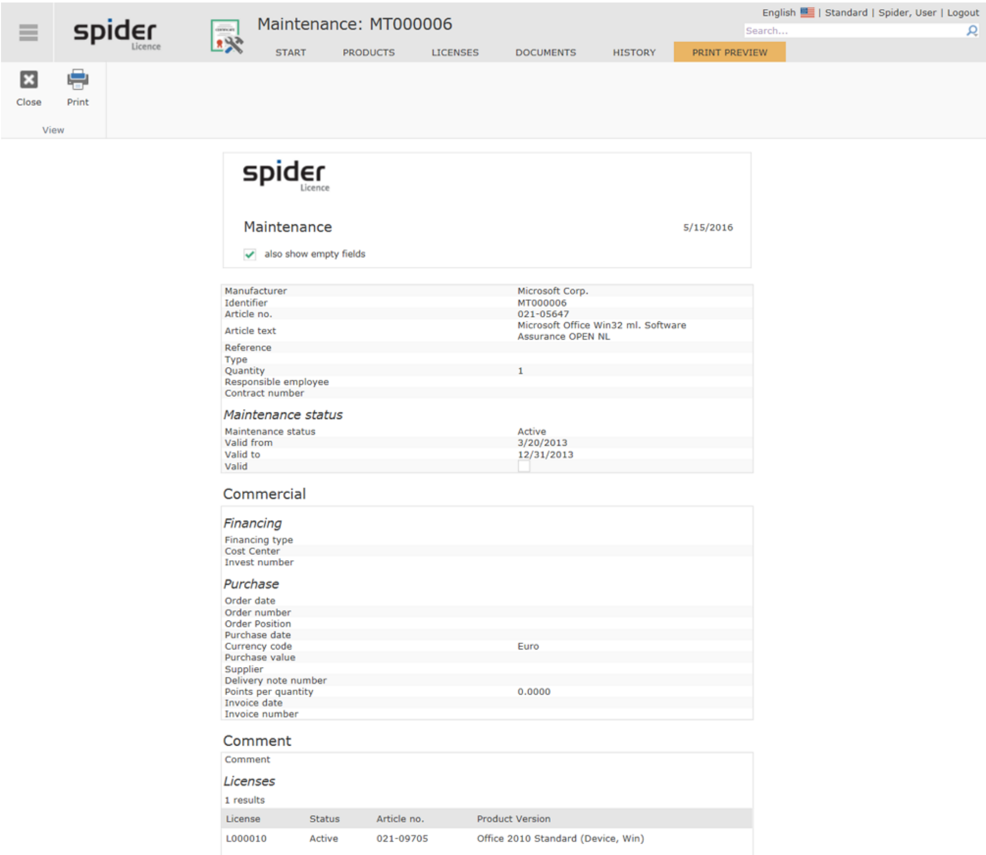
5.4 Print

By means of the **Print** function, you have the possibility to convert object forms into a printable format and make a printout. This function is available for nearly all Spider objects.

- To open the print preview, click on the **Print** button in the View ribbon group in the Edit form of an object.
- To start the print, click again on the **Print** ribbon button in the print preview.

The print preview opens. The contents of the Edit form are shown beneath each other.

- Use the **Print** ribbon button to open the Print dialog which enables you to select a printer and start the print.
- Use the **Close** ribbon button to exit the print preview and show the object form again.



5.5 Automated E-mail reports

Administrators or users with corresponding permissions can use the *Alert And Report System* function to save automatic e-mail reports which are then sent automatically to defined recipients at a predefined time and interval. For example, you can use this function to remind the employee in charge, to observe an expiration/renewal date.

In the following sample e-mail report, the employee in charge in notified that he must check validity date for the specified maintenances.

From: SpiderLicenceService@Spider-LCM.de [mailto:SpiderLicenceService@Spider-LCM.de]
Sent: Dienstag, 20. November 2012 10:00
To: Bluem, Martin
Subject: [Reminder]

Please check the following maintenance:

MaintenanceEdit

Manufacturer	Adobe Systems Inc.
Product	Acrobat Standard (Device, DE)
Type	Remote Access
Maintenance	MT000001
Quantity	60
Status	Aktiv
ArticleNo	09972502AA02A18
ArticleText	Adobe Acrobat Standard Win/Mac ger. Maintenance Renewal (16-18 Months remaining) CLP5
ValidFrom	09.05.2012 10:24:58
ValidTo	08.11.2013 00:00:00
RemainingPeriod	353
LegalEntityPath	Zentrale/Consulting

MaintenanceEdit

Manufacturer	Adobe Systems Inc.
Product	Acrobat 3D (Device, EN)
Type	On-S
Maintenance	MT000002
Quantity	25
Status	Aktiv
ValidFrom	26.05.2012 13:37:02
ValidTo	25.05.2013 00:00:00
RemainingPeriod	186

MaintenanceEdit

Manufacturer	XMind Ltd.
Product	XMind Pro (User)
Maintenance	MT000003
Quantity	100
Status	Aktiv
ValidFrom	29.05.2012 15:22:51
ValidTo	28.05.2013 00:00:00
RemainingPeriod	189
LegalEntityPath	Zentrale/Consulting

This email was sent automatically by Spider Licence Alert and Report System.

Note

When clicking on a link, the Edit form of the corresponding Spider object is opened directly. For access to the object in Spider you will need the required permissions.

CHAPTER 6

Report center

The report center provides several reports and query options within Spider.

➢ You will reach the report center by clicking on the **Reports** ribbon on the home page.

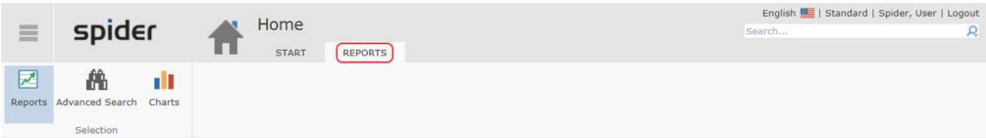
➢ Alternatively, you can select the Reports item in the **Backstage** (on page 35).

In the ribbon group Selection, three different sections are available: **Reports**, **Advanced Search** and **Charts**.

Use Reports to open predefined reports. These can be filtered and saved as report favorites. Report favorites save filters and settings of a report for later usage.

Use Advanced Search to create Ad-hoc queries within the installed Spider modules and save them for later usage.

Use Charts to compose individual charts from graphical reports.



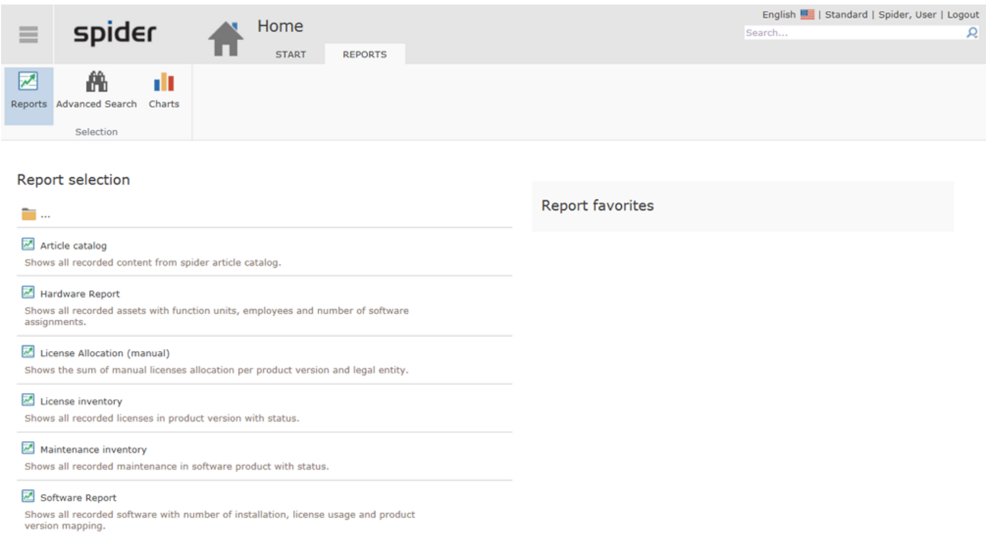
6.1 Reports

Use **Reports** to open predefined reports. These are shown in folders grouped by categories.

Reports can be based on several filter conditions. The functions such as adapting the displayed fields, the saving and loading of search queries and favorites are also available for reports.

➢ Open the report center by clicking on the Report ribbon on the home page or by selecting Reports in the **Backstage** (on page 35).

➢ Make sure that the **Reports** item is selected in the ribbon.



Reports are shown in folders grouped by **categories**. Click on a folder to open it and show the contained reports. Next to a name, a short description of the report is available. The selected folder is kept for a new start of the report center.

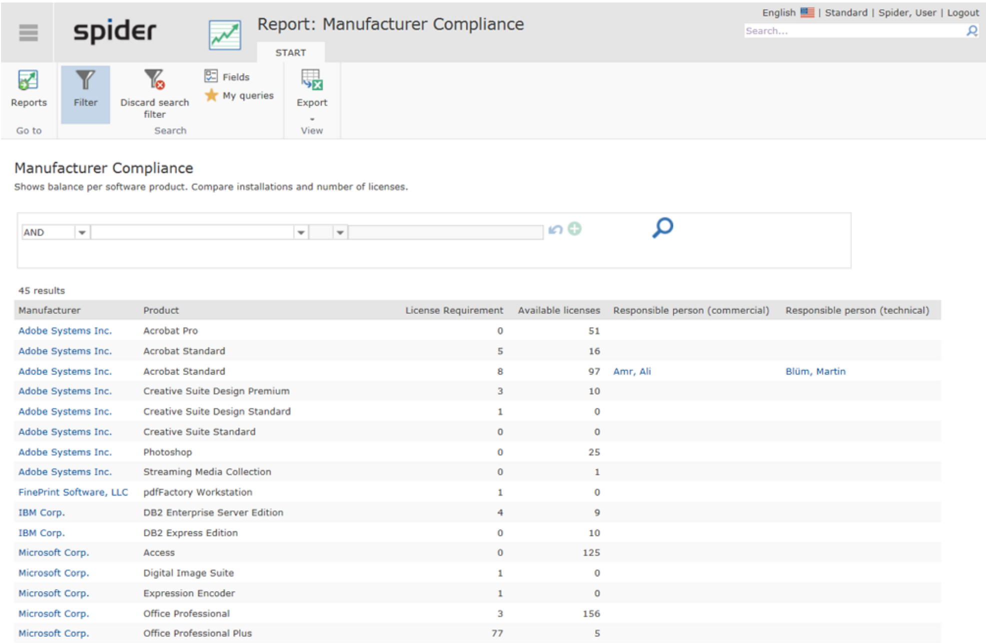
- Selecting the report to open it.
- To return to the overview, select the **Top Level**.

The right column shows your report favorites.

6.1.1 Show and filter reports

A report is a predefined query, the result of which is shown as a table. Furthermore, you can use filters and restrict the output fields to adapt the result according to your needs.

Depending on the report settings, it will be executed automatically when called, and the result will be shown. In case of larger reports, we recommend using filters for restricting the search result.



In addition, the following functions are available:

Function	Meaning
Reports	Navigates to the report selection which is used for viewing the reports or selecting other searches.
Filter	Shows/hides the filter section. In the filter section, you can create or modify additional filters.
Field Selection	Use the **Field selection** to decide which fields shall be displayed when the results are listed. For more information see chapter **Customize search results** (see "**Customize search results - Field selection**" on page 57).
My queries	Use **My queries** to save your filter settings. You will find a description of this function in the chapter **Save search** (see "**Save a search (My queries)**" on page 57).
Export	Use this button to export data into an Excel or CSV format. You will find information about the export in the chapter **Data export** (on page 57).

Note	If you are loading large reports the execution of which in the database will take longer time, a progress bar will be displayed.

Once a report is loaded, it will be kept saved via an integrated caching mechanism so that it can display faster. This applies for sorting or changing to another result page (paging). Only when making a new query or changing the filter conditions, the report is reloaded from the database.

6.1.2 Filter conditions

Use Filter conditions to further restrict the report result. Reports can be based on several filter conditions.

A filter condition consists of a link, the field to be filtered, a relational operator and the filter.

Link

Several filter conditions are linked by logical operators. The following logical operators are available: "AND" (logical and), "OR" (logical or), "AND NOT" (logical combination and not), "OR NOT" (logical combination or not).

Field

For each report, you can restrict the fields for which you are allowed to create filter conditions. This could be the reason why you do not see all fields in the field selection although they exist in the report result.

Relational operator

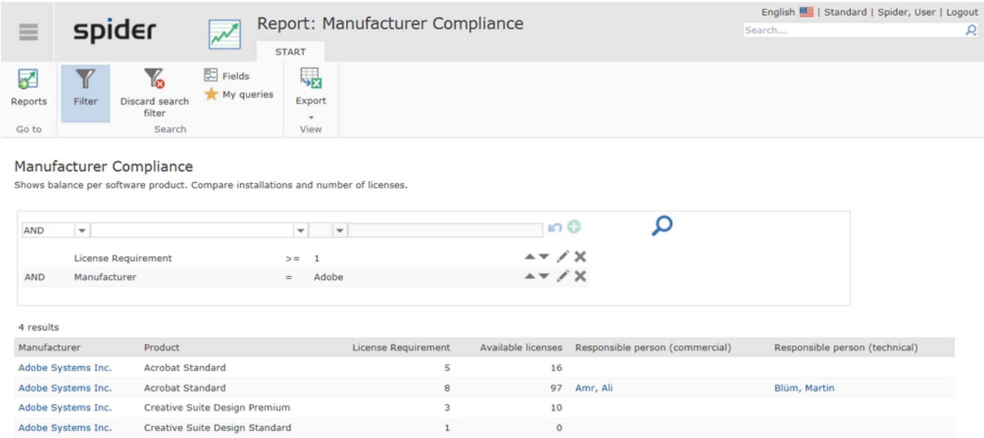
The following relational operators can be selected for a field: "=" equal, "<" less than, ">" greater than, "<=" less than or equal to, ">=" greater than or equal to "<>" unequal.

Filter

The filter options are predefined. You can either enter them by free text input or by selecting them from a list. When using the free text input, you can use placeholders such as the asterisk "*".

A filter can be created in a few steps:

- ➢ If a filter condition is existing already, please select at first a logical link (e.g., AND, OR etc.).
- ➢ Then open the dropdown list and click on the field to be used as filter (e.g., license requirement).
- ➢ Select the operator (e.g., =).
- ➢ Then enter the search criterion to be used as filter.
- ➢ Then click on the green arrow to add other search criterion or on the magnifying glass to execute the report.



If several filters have been set for the report, they will be shown beneath each other in the filter section. You can adapt or delete a filter condition or change the sequence of the filter conditions anytime.

Symbol	Meaning
	Accepting a filter condition: A new filter condition will be added. If an existing filter condition is changed, it will be updated.
	Canceling the changes for a filter condition. This function is only shown if an existing filter condition has been modified.
	Execute the report again by applying the filter conditions.
	Move a filter condition. The filter conditions are evaluated in the sequence of their indication. Use the arrows to easily change the sequence of the filter conditions.
	Editing a filter condition. After clicking on the condition, it will be shown in the upper section again for editing. The filter condition can be modified and confirmed again.
	Deleting a filter condition.

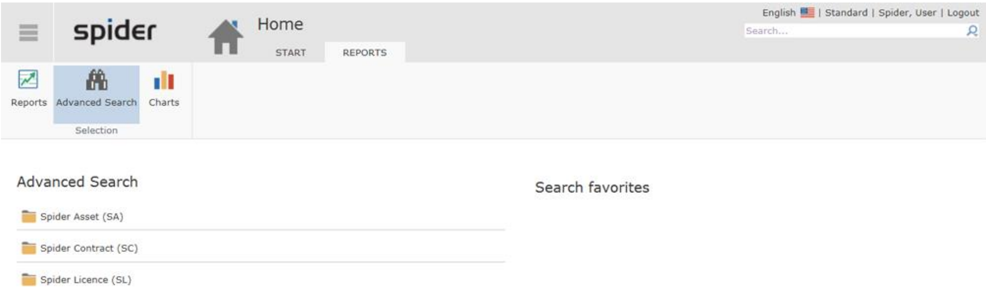
To adapt the sequence of the filter conditions.

- ➢ Click on the blue arrows next the filter conditions to move them up or down.

6.2 Advanced search

The advanced search is intended for cross-object search queries within a Spider module such as Spider Contract, Spider Licence or Spider Asset. The functionality can also be understood as ad-hoc query. A search query can consist of several conditions for different objects. You can save created queries and make them available for other users. Usually, the creation of an advanced search query is only suitable for advanced users since knowledge about the object model is required. By publishing search queries for other users, queries can be prepared by advanced users and made available for other users.

- To go to the Advanced Search, click on the **Reports** ribbon on the home page.
- In the **Selection** ribbon group, click on the item **Advanced Search**.

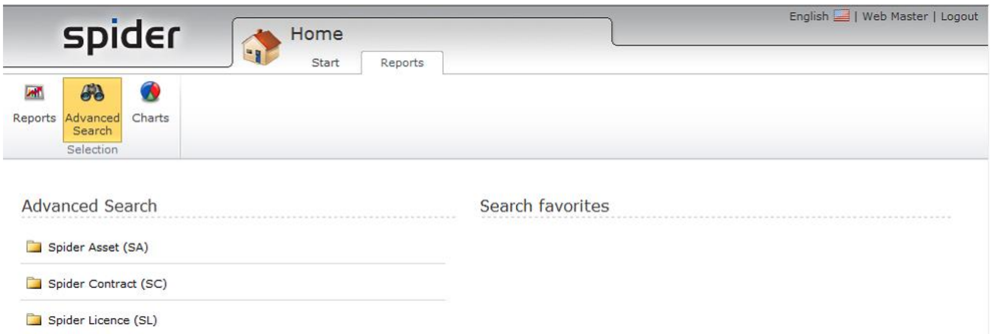


The left column shows the Advanced Search as folder per installed Spider module. The right column shows your search favorites from the advanced searches. If you do not have marked a search query as favorite, this list will be empty.

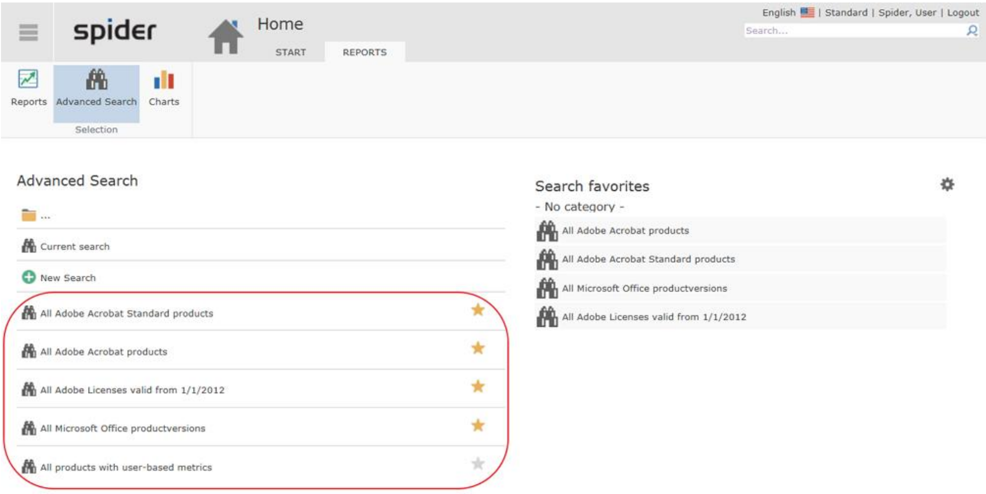
6.2.1 Loading a search query

You can load an advanced search via the summary page of the advanced searches in the report center. You can load all search queries which have been saved by you or another user and which you are authorized to use.

- Select a **module** for which you want to open the Advanced Search.



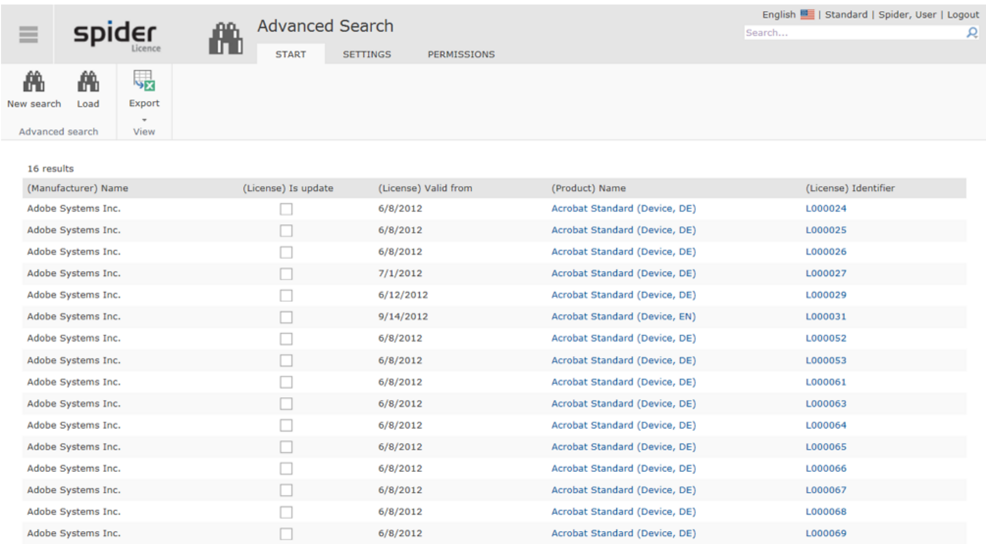
The search queries saved for the selected module are shown. Use the item **New Search** to start an ad-hoc query for the Spider module.



- ➢ Click on the desired query.
- ➢ By clicking on the Favorites icon of a query, you can add the query to your search favorites.

6.2.2 The search result

After you have loaded a search query, the result of the advanced search is displayed in table form. The search query provides the columns of the advanced search defined in the settings and offers the possibility to sort the search result. The result of an advanced search can look as below:



(Manufacturer) Name	(License) Is update	(License) Valid from	(Product) Name	(License) Identifier
Adobe Systems Inc.	☐	6/8/2012	Acrobat Standard (Device, DE)	L000024
Adobe Systems Inc.	☐	6/8/2012	Acrobat Standard (Device, DE)	L000025
Adobe Systems Inc.	☐	6/8/2012	Acrobat Standard (Device, DE)	L000026
Adobe Systems Inc.	☐	7/1/2012	Acrobat Standard (Device, DE)	L000027
Adobe Systems Inc.	☐	6/12/2012	Acrobat Standard (Device, DE)	L000029
Adobe Systems Inc.	☐	9/14/2012	Acrobat Standard (Device, EN)	L000031
Adobe Systems Inc.	☐	6/8/2012	Acrobat Standard (Device, DE)	L000052
Adobe Systems Inc.	☐	6/8/2012	Acrobat Standard (Device, DE)	L000053
Adobe Systems Inc.	☐	6/8/2012	Acrobat Standard (Device, DE)	L000061
Adobe Systems Inc.	☐	6/8/2012	Acrobat Standard (Device, DE)	L000063
Adobe Systems Inc.	☐	6/8/2012	Acrobat Standard (Device, DE)	L000064
Adobe Systems Inc.	☐	6/8/2012	Acrobat Standard (Device, DE)	L000065
Adobe Systems Inc.	☐	6/8/2012	Acrobat Standard (Device, DE)	L000066
Adobe Systems Inc.	☐	6/8/2012	Acrobat Standard (Device, DE)	L000067
Adobe Systems Inc.	☐	6/8/2012	Acrobat Standard (Device, DE)	L000068
Adobe Systems Inc.	☐	6/8/2012	Acrobat Standard (Device, DE)	L000069

Note Please note that in contrast to the object-related search, the result amount in the Advanced Search is unlimited.

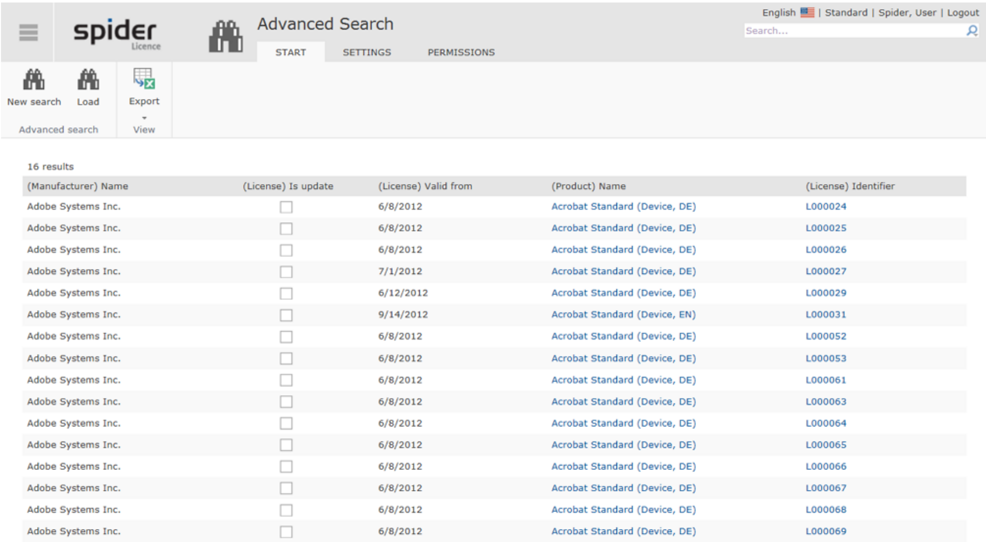
In addition to the field names, the column headers also contain the object name (in brackets prior to the field name). This is to enable the user to distinguish fields having the same field name in different objects.

According to the number of results, there will be perhaps more than one page. You can select the individual pages by clicking on the page number in the upper left corner of the table.

The sorting can be adapted by means of the number symbols. The sorting of the result is carried out like the sorting of a result of an object search. Refer to the section **Basics** (see "**Sort search results**" on page 57) for a detailed description. Use the hyperlinks in the result to directly navigate to a Spider object.

6.2.3 Settings ribbon - Customize search queries

The following could be a possible query: Show all Adobe Standard licenses with validity date as of 6/1/2012. The result of the advanced search should be shown as follows:

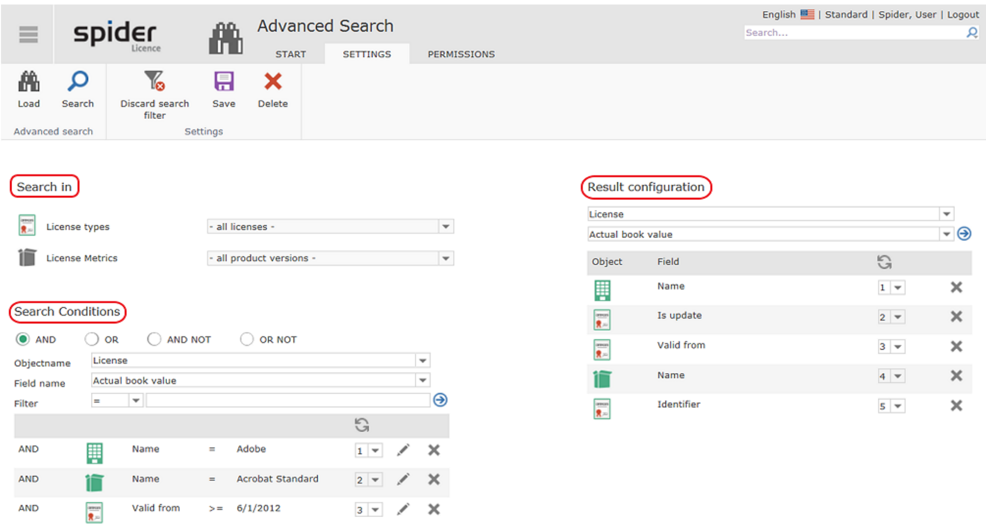


Note	This example refers to Spider Licence. In the products Spider Asset and Spider Contract, the functionality is designed in analog form and can therefore be transferred.

Advanced searches are carried out in the **Settings** ribbon.

➢ If you have loaded an advanced search, please select the **Settings** ribbon on the result page.

The form for editing advanced searches is divided into the sections **Search in**, **Search conditions** and **Result configuration**.



Display	Product	Meaning
Search in		Use this section to determine the search objects. As soon as the first search conditions are set, the selection cannot be changed anymore.

Display	Product	Meaning
	Search objects for Asset	**Asset types** determine whether to search for all or only for a certain asset type. **Function unit types** determine whether to search for all or only for a certain function unit type.
	Search objects for License	**License types** determine whether to search for all licenses or only within a certain license type. **License metrics** determine whether to search for all license metrics or only within a certain metric.
	Search objects for Contract	**Contract types** determine whether to search for all or only for a certain contract type. **Object types** determine whether to search for all or only for a certain object type.
Search conditions		Use search conditions for determining the search conditions for filtering the data by specifying the **Object name** and **Field name**. The individual search conditions are combined via search operators (AND, OR etc.).
Result configuration		The result configuration specifies the data fields which shall be shown as columns in the result. The content and the number of columns as well as their layout can be configured.

Search conditions

Each search condition of the advanced search consists of a Spider **Object**, the **Data field** to be searched, the **Operator** (<, >, =, ...) and the **Filter criterion**.

Creating a search condition

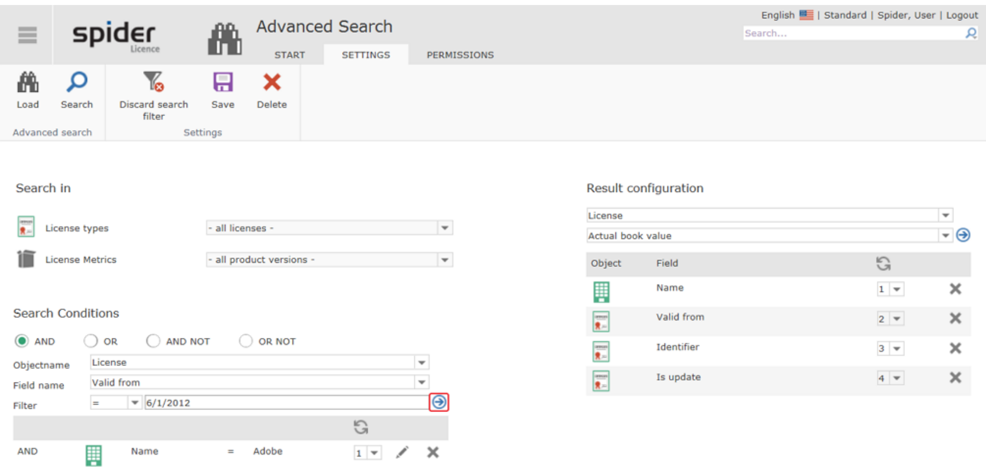
To create a new search condition, select the **Object name** and the **Field name** of the field to be filtered in the Search conditions section. Complete your input by specifying the **Operator** and the **Filter criterion**.

The filter criterion allows for the usage of placeholders. The placeholder "*" represents an arbitrary sequence of alpha-numeric characters, the placeholder "_" represents one arbitrary character.

➢ Confirm the creation of the search condition by pressing the button Add (blue arrow).

Then the search condition will be shown in the lower section of the search conditions.

Note Please note that data type and filter must match. For example, you cannot filter for a date with a text value.

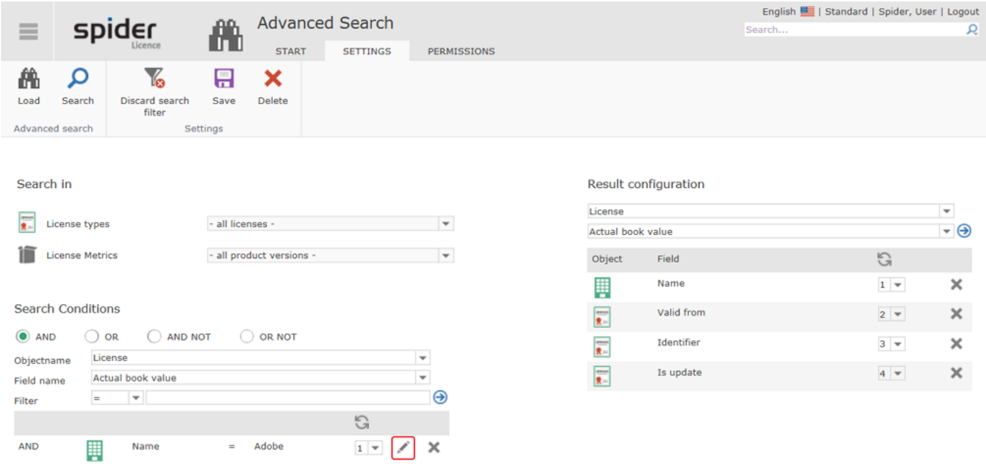


Now, you can add other search conditions. Use **AND** (logical "and"), **OR** (logical "or"), or **AND NOT** (logical combination "and not") to link to subsequent search conditions with each other. Enhance the result amount (**OR**) or restrict it by using (**AND**) or (**AND NOT**).

Editing a search condition

Existing search conditions are shown in the lower section of the search conditions. For editing, the search condition must be selected.

➢ Confirm the selection of the search condition by pressing the Edit button (pencil).



The search condition is now loaded into the fields which have used to create the search condition.

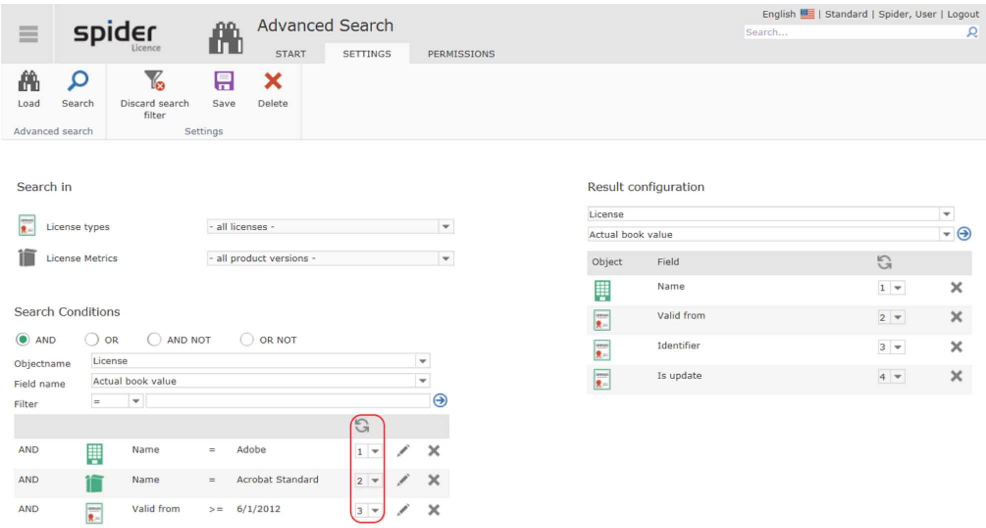
➢ After you have edited the field and/or the filter criteria of the search condition, you must confirm the changes by pressing the **green arrow**.

Sequence of search conditions

You are still able to modify the sequence of the search conditions. This is done by using the selection boxes in the existing search conditions.

If, for example, the number "**1**" is entered into a field, it will be placed automatically in first position and the field, which has had the number "**1**" so far, will be placed automatically in second position. Each other field will be moved by one position accordingly.

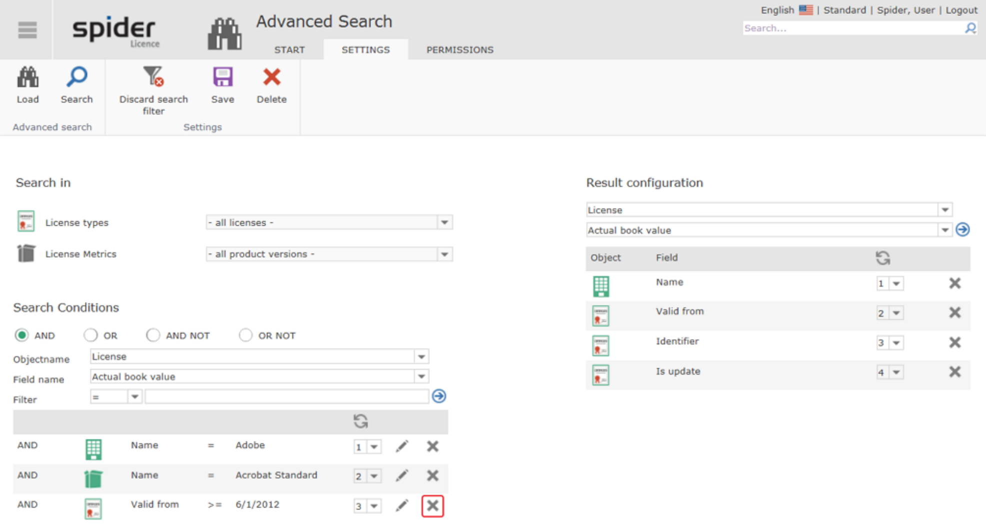
➢ To change the sequence of search conditions, select the desired rank in the selection box and confirm your input by pressing the **Update** button (green update icon).



Note	Changes to the sequence of the search conditions are only executed after the confirmation by pressing the Update button.

Deleting a search condition

➢ To delete a search condition, click on the **Delete** button (red X).



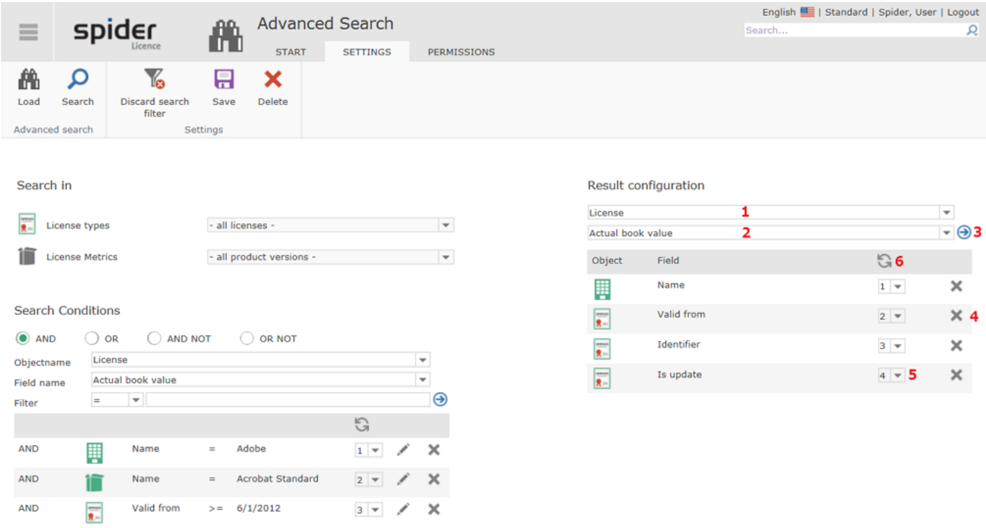
Note	The search conditions are deleted without further security prompts.

Determine visible fields

On the right side of the form, you can specify the fields to be shown in the **Results Configuration**. Then you can simply specify the **Object** and the related **Data field** which is to be output.

As you can see, Spider adds the first display fields to your search query directly after adding the search condition. Enhance or remove the already existing suggestions according to your needs.

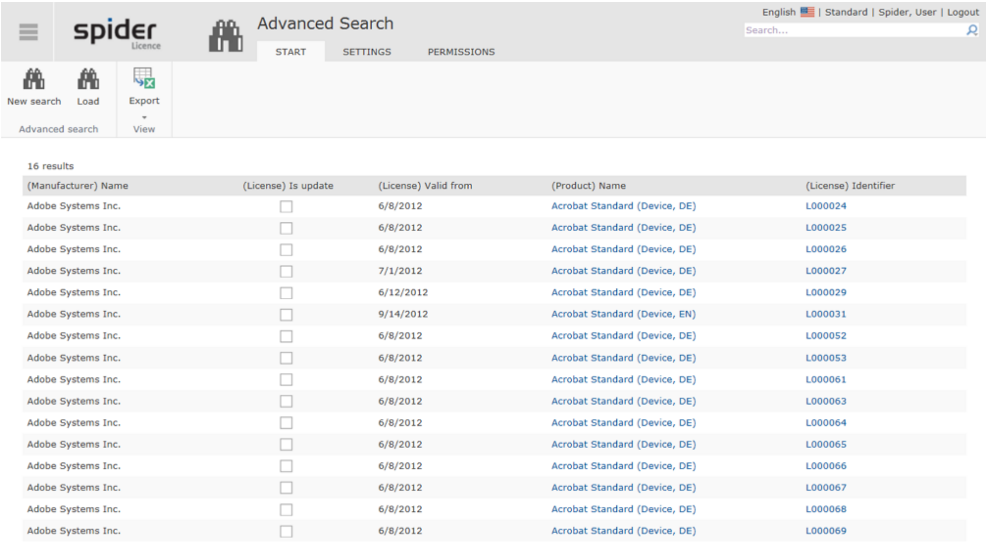
Note	Similar to the sequence of the search conditions, you can also change the sequence of the displayed columns. Changes to the column sequence will only take effect after pressing the **Update** button (6).



Number	Meaning
1	Object selection: Select from this dropdown box the object, which is to be displayed in the results.
2	Field Selection: Select from this dropdown box a field of the object selected above, which is to be displayed in the results.
3	Add: After clicking the Add icon, the requested selection will be added to the output list.
4	Delete: By using this red X icon you can delete entries from the list anytime.
5	Sequence: Please note that the data are output per column in the order of their input. The sequence can be determined and changed according to your needs by using the dropdown list in front of each field.
6	Update: If you have changed the sequence, click on this button to update the data.

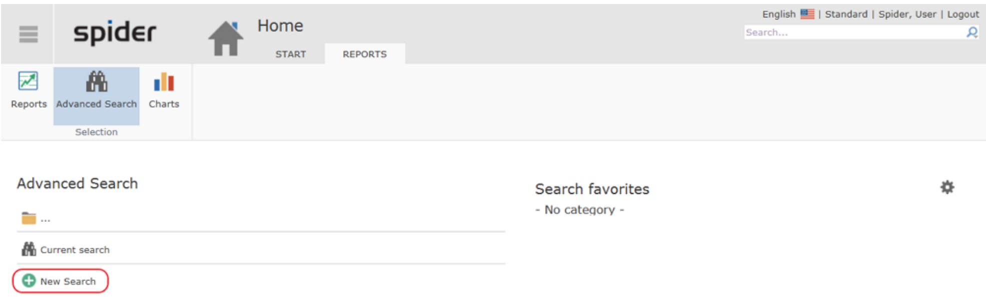
Execute the search

To execute a search query, click on **Search** in the ribbon. The search is executed, and the result is shown on the Start ribbon.

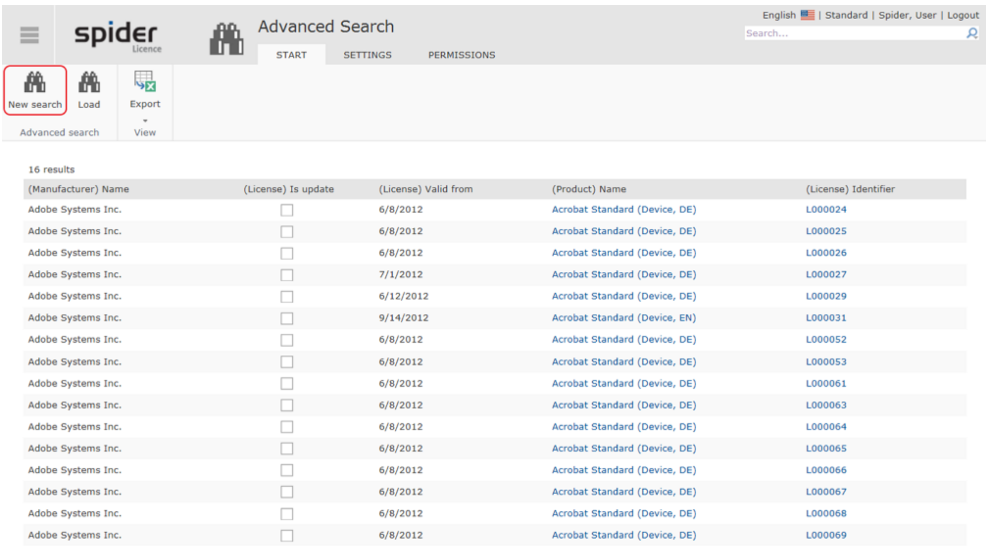


6.2.4 Creating new search queries

There are several possibilities to create new search queries (ad-hoc queries).



➢ Select a product in the advanced searches of the report center and click on **New Search**.



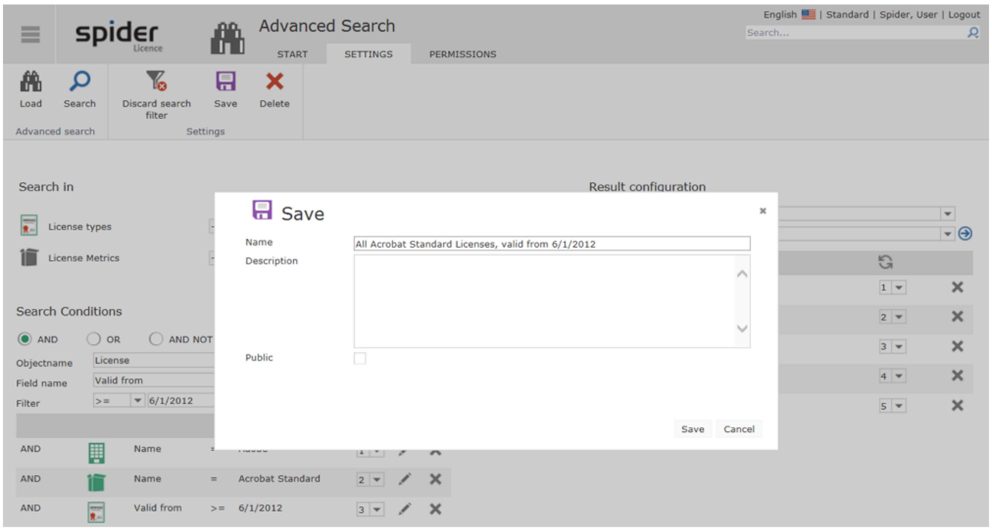
➢ If you have already loaded a search query, click on the **New search** button in the result view of the advanced search.

Note	The creation of advanced searches is done like the editing of advanced searches, therefore we do not describe the creation here in detail. For further information please refer to the section Editing search queries.

6.2.5 Saving search queries

A created or modified search query may be saved for later usage.

- You have created or modified an advanced search query.
- Select the **Settings** ribbon and click on the **Save** ribbon button.



To save the search query, you must specify a name. A description of the search query is optional. Name and description will be output on the summary page.

- Confirm your entered data with **Save**. Use **Cancel** to cancel the process.

For overwriting saved search queries, you will need the administrative permissions for the search query. If they are not available, the search can be saved under a new name. If the same name is stated for the search and if no administrative permissions are available, the search will be saved under a new name. This is done by increasing a number in brackets behind the name.

Note	Public search queries are available for all users.

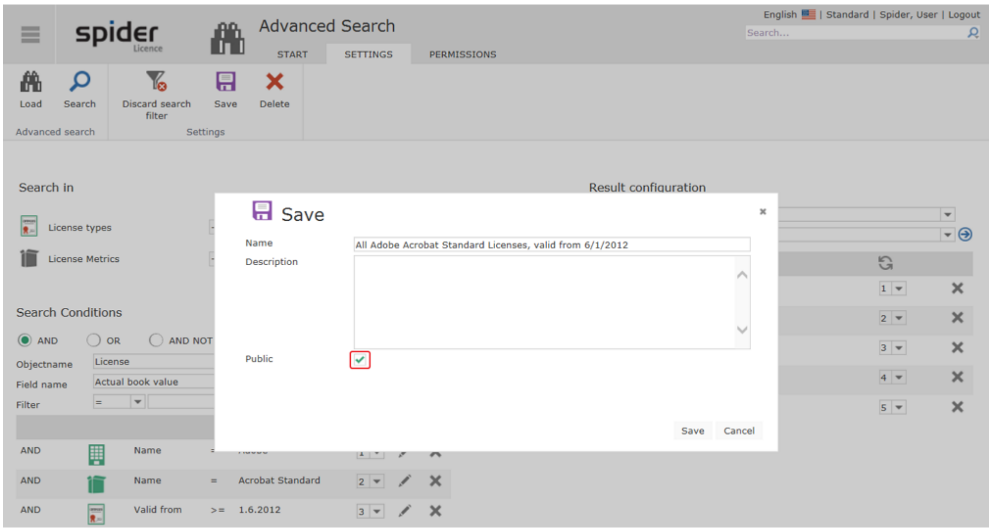
6.2.6 Publish and authorize search queries

Spider allows for granting the permission of search queries for individual roles and users. There are two options: read-only and administrative permissions.

Permission	Meaning
Read-only	The user is allowed to see the result of the search query. He can change the search settings but is then forced to save the search under a new name.
Administrative	In addition to the read-only permissions, the user can overwrite the search query. Furthermore, he may change the permissions of the advanced search (visibility and administrative permissions for other users). The deletion of advanced searches is also only possible for user roles and users with the corresponding administrative permissions.
Public	Public searches are visible for all users.

Public search queries

➢ To make a search query public, check the box **Public** in the Save dialog of the advanced search.

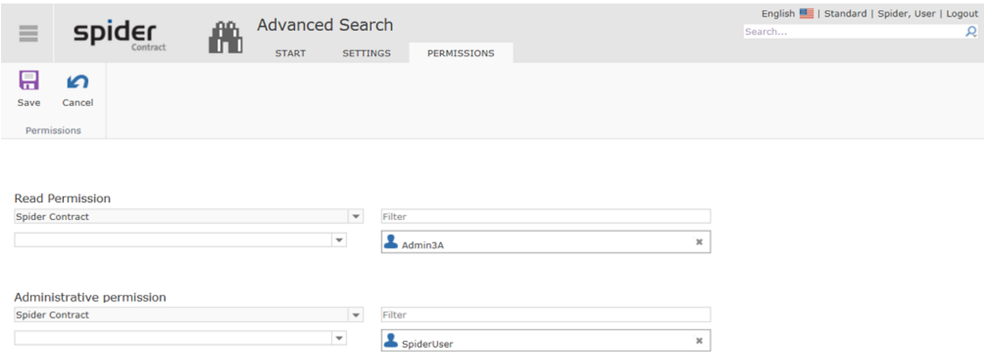


Note	Public search queries are visible for all users. The users and roles with administrative permissions may be determined in addition.

Authorize search queries

The change of the permission for a saved search query is carried out via the **Permissions** ribbon.

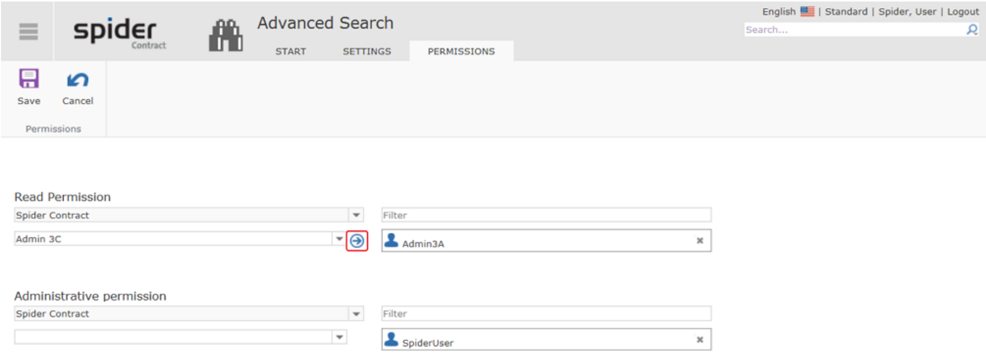
Note	Before you can grant permissions for advanced searches, the advanced search must be saved. When the advanced search is saved for the first time, the logged-in user is granted administrative rights to the advanced search.



The illustration shows a saved search for which the user Spider User has the administrative permission to edit the search. In addition, the user Admin 3A is granted a read permission for this advanced search.

Add permission

To authorize another user role or another user for the advanced search, select the user role or another user from one of the selection lists. Right to the selection box, the Authorize button is shown.

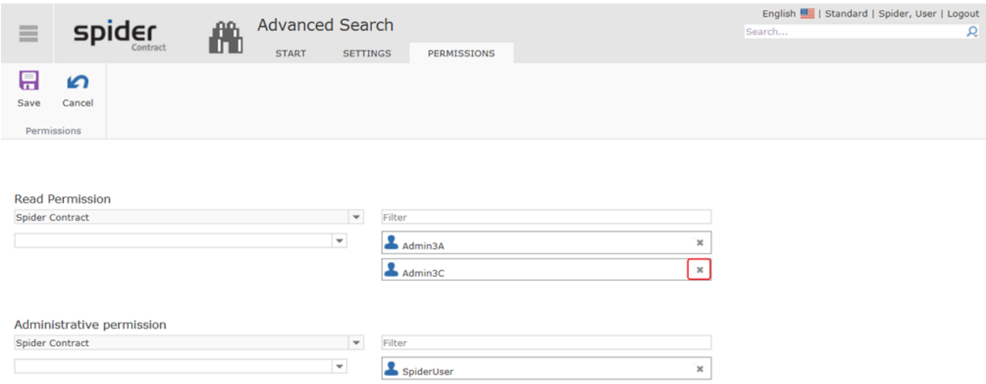


➢ Confirm the selection of the user role or of the user by pressing the **Authorize** button (blue arrow).

Deleting permissions

The deletion of a permission (read-only or administrative) is carried out by clicking on the gray X at the assigned user roles and user groups.

➢ To delete a permission, click on the **Delete** button (gray X).

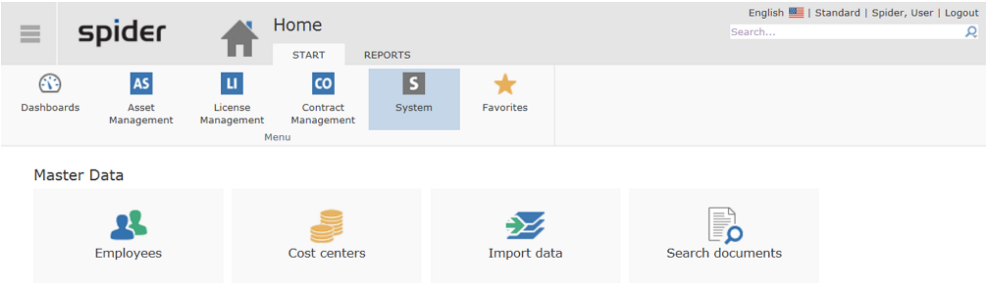


Note	At least one of the administrative permissions must be saved for the advanced search, otherwise editing the search will not be possible anymore. Therefore, Spider prohibits deleting the last administrative permission for a search query.

Master Data

Spider differentiates between cross-module and module-specific master data. Cross-module master data are maintained in the Spider Core system. You reach the master data via the **System** menu on the home page. You will find the module-specific master data in the corresponding menu such as Spider Licence, Spider Asset or Spider Contract.

- To reach the cross-system **Master data**, select the menu item **System** on the Spider home page or in the **Backstage** (on page 35).



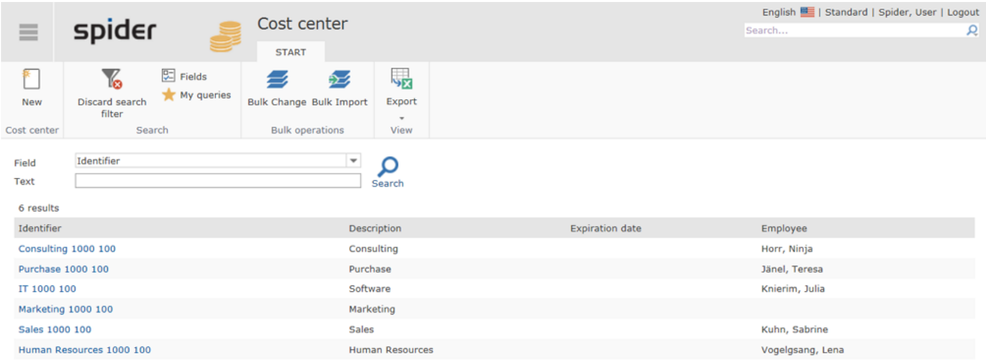
Note	Depending on your Spider Core version and configuration, the appearance and functionality as well as the handling of master data may be different.

7.1 Cost centers / Cost center master

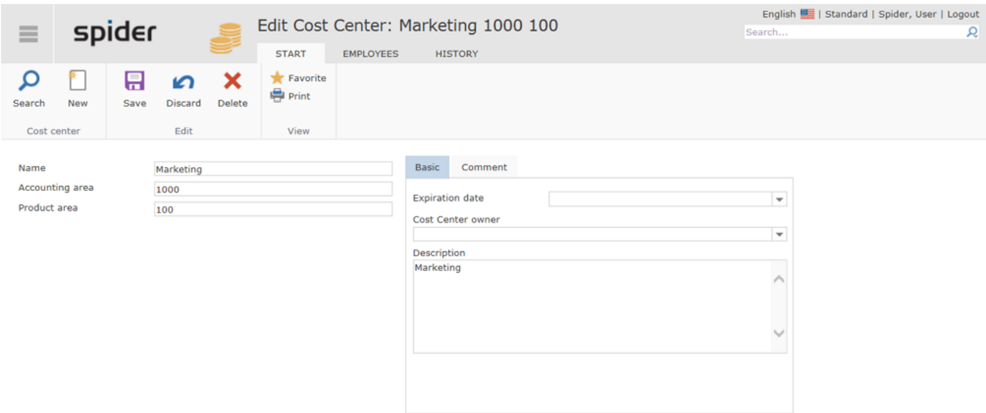
To be able to execute evaluations based on **Cost centers**, it will be necessary to manage some basic data from the **Cost center master** in Spider. Since most of the companies maintain their cost center master already in an ERP system, the continuous synchronization of these data is usually carried out via an **interface**. Therefore, the manual entering, and maintenance of the cost centers as described below is not used in Spider anymore.

7.1.1 Edit cost centers

- To make changes in the cost center section, select the **System** menu on the **home page**. Click on **Cost center** in the Master Data menu section.
- Alternatively, you can select System in the **Backstage** (on page 35) and click on the menu item Cost center.
- The cost center search opens. Select a cost center or search for a cost center via the **Filter** functions.



Define a cost center owner by selecting a name from the employee master data in the field **Cost center owner**.

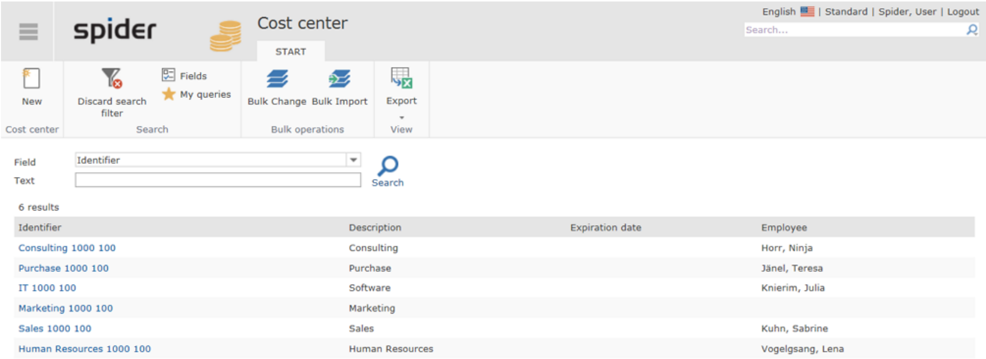


- After editing the data, click on the **Save** ribbon button to save your entered data.

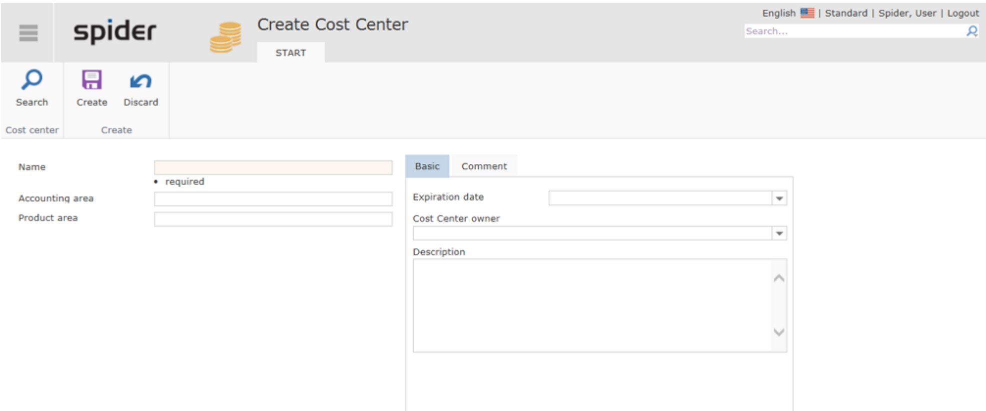
Note	If an expiration date is set for a cost center, this cost center will not be available for new assignments after the expiration date.

7.1.2 Create cost centers

- To create new cost centers, select the **System** menu on the **home page**. Click on **Cost center** in the Master Data menu section.
- Alternatively, you can select System in the **Backstage** (on page 35) and click on the menu item Cost center.



- Click on the **New** ribbon button in the cost center search or in the Edit form of a cost center to create a new cost center.
- The Create form for entering the cost center data will open. Fill in the corresponding fields and click on the **Create** button to save your entered data.

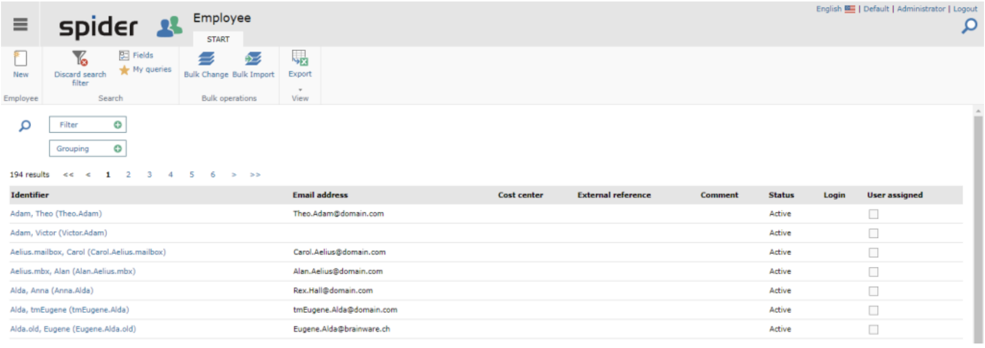


7.2 Employees / Employee master

Spider uses the employee data to map responsibilities and assignments or to assign recipients to automatically sent e-mail notifications. Usually, the employee data is synchronized with leading systems such as SAP or Active Directory (A) using an interface. Therefore, the manual maintenance of employee data as described below is not used in Spider anymore.

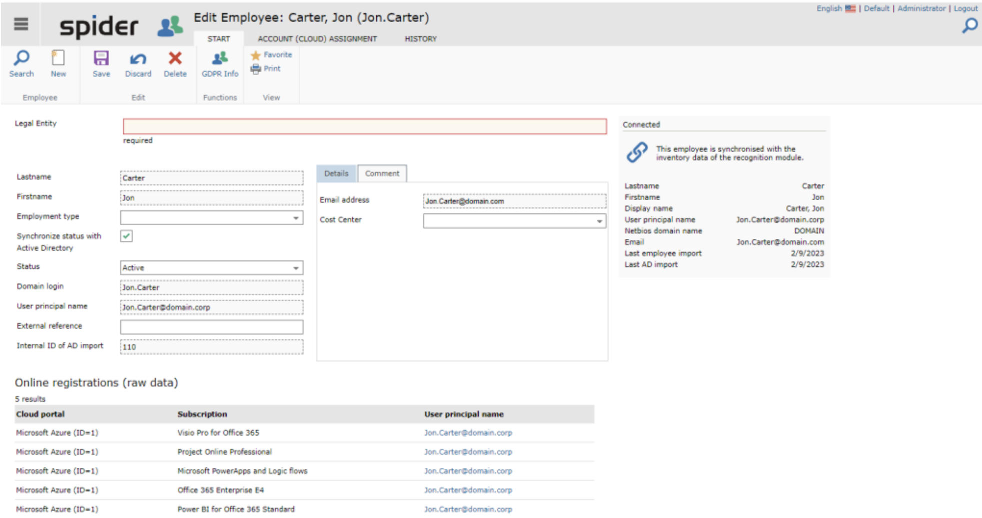
7.2.1 Edit employee object

- To make changes in the cost center section, select the **System** menu on the **home page**. Click on **Employee** in the Master Data menu section.
- Alternatively, you can select System in the **Backstage** (on page 35) and click on the menu item Employee.
- Search for an employee using the **Filter** functions and select him. The Edit form for this employee will open.



The relevant data for an employee are **First name, Last name** and **Domain login** or **E-mail address** because of uniqueness. The E-mail address is also required for **automatic notifications**. Additional data such as the **Employee cost center** or **legal entity** allow for finer selections and evaluations.

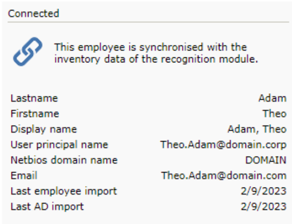
For software assignments to an employee resulting, for example, from a link to an online account, it is mandatory that the employee belongs to a legal entity. Only then can a software assignment inherit the employee's legal entity.



- After editing the data, click on the **Save** ribbon button to save your entered data.

Employees are created automatically if they are supplied by appropriate connectors. If the employee was created in this way or if a manually created employee was mapped uniquely to a supplied one, the employee is considered connected. Connected employees are automatically synchronized, which protects some fields in the form from changes.

The presence of the **Connected** tile indicates that the employee is connected to, for example, an Active Directory user. It shows the raw data coming from the Recognition module, as well as data about the actuality of the data.



Note If a user is no longer delivered from the Recognition module, for example because he is no longer listed in the connected directory, the employee is not deleted in Spider. Instead, he changes his status to an inactive status.

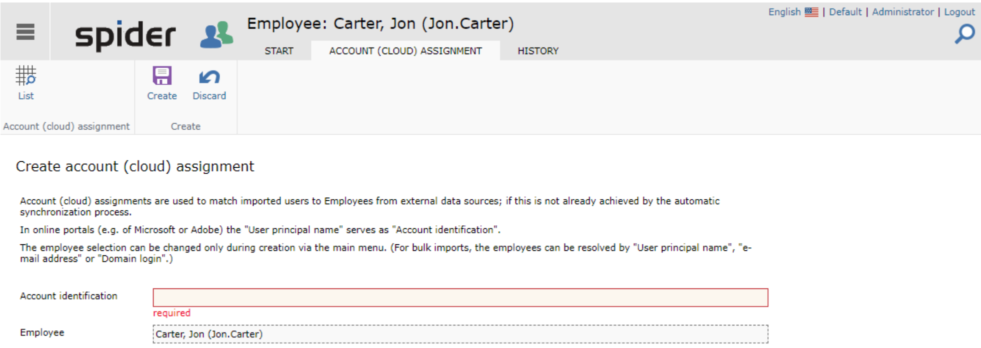
The tab "Account (Cloud) Assignment"

An employee can be mapped to one or more online accounts.

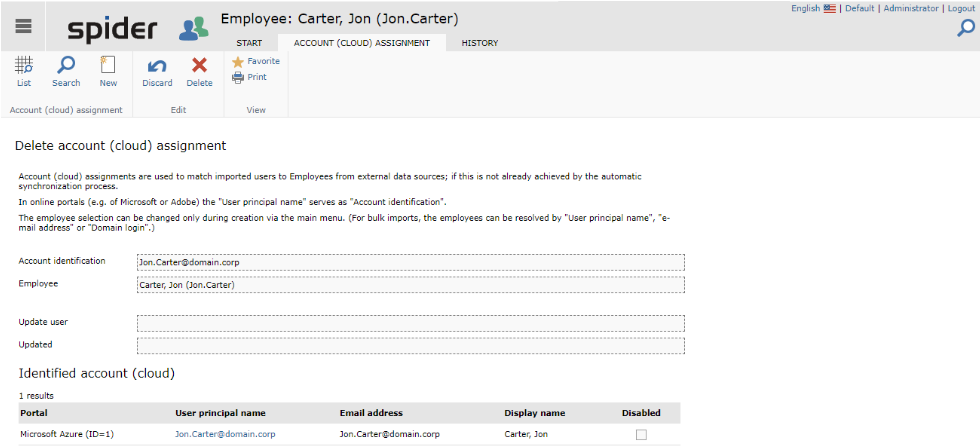
➢ To view, add or delete online accounts for an employee, click the tab in the Edit form.

In addition to the bulk operations, the export, and the standard search functions, it is also possible to configure a new portal connection via the **New** menu item. This is usually necessary in special cases only, since Spider tries to map employees and their online registrations automatically.

➢ To map a user account to an employee, click on the button in the ribbon menu.



➢ Enter the account identifier under which the user can be identified in the portal used. And click **Create** in the menu.



After creation, the manual mapping can be displayed. If accounts have already been identified, they will also be displayed. To allow the Recognition module to automatically map accounts again, the manual assignment must be deleted.

After a new run of the services that ensure synchronization with the Recognition module, the employee is linked to the online account and a table with the online registrations is displayed on the Employee Edit page.

Achtung	At this point, the system does not validate whether this account is known to the system. If the identifier has no equivalent in the account data of the recognition module, no software assignments will be created for this employee. Pay attention to the correct spelling. How to link an employee for an existing account is described in the chapter "Cloud Accounts" on page 111.

The "History" tab

The employee has standard functions for historization. Details can be found in the "History" chapter on page 286.

The dynamic "GDPR Info" tab

To provide information within the framework of the German Data Protection Regulation, this page helps to find out the data protection-relevant information about an employee that is known to the system.

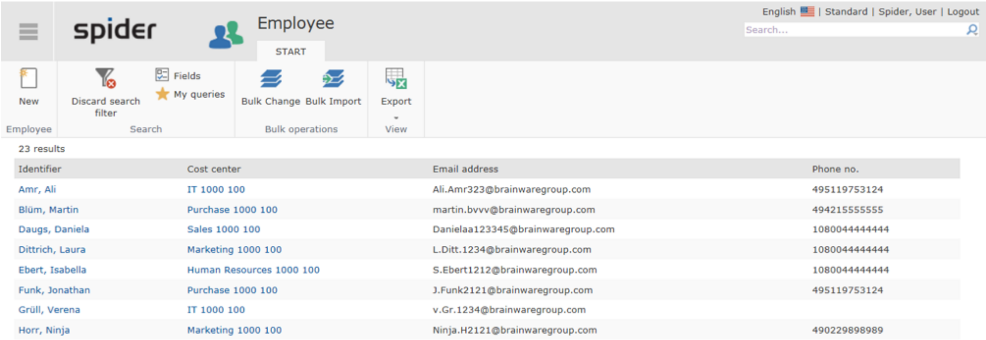
➢ Select an employee from the employee search. On the employee's Edit form, click the **GDPR Info** button.

The page is used exclusively for displaying and preparing the data for printing.

7.2.2 Create employee

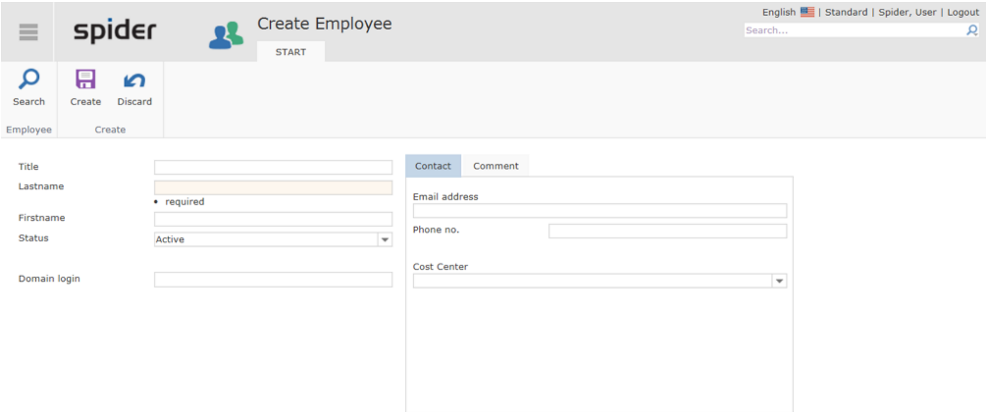
➢ To create a new employee, select the **System** menu on the **home page**. Click on **Employee** in the Master Data menu section.

➢ Alternatively, you can select System in the **Backstage** (on page 35) and click on the menu item Employee.



➢ Click on the **New** ribbon button in the employee search or in the Edit form of an employee to create an employee.

The form for entering the employee data will open.



➢ Here you can fill in the corresponding fields and click on the ribbon button **Create** to save your entered data.

7.3 Legal entities

The legal entity is used to map the hierarchy in a company. If objects such as assets, contracts or licenses are assigned to legal entities, all calculations and evaluations can be executed on the various hierarchy levels. Furthermore, data which have been assigned to a legal entity can only be viewed by users who possess a corresponding permission for this legal entity.

Users or roles have permissions for legal entities. That means that the access right is granted for a legal entity and all subordinated legal entities. This is like the permission in a file system.

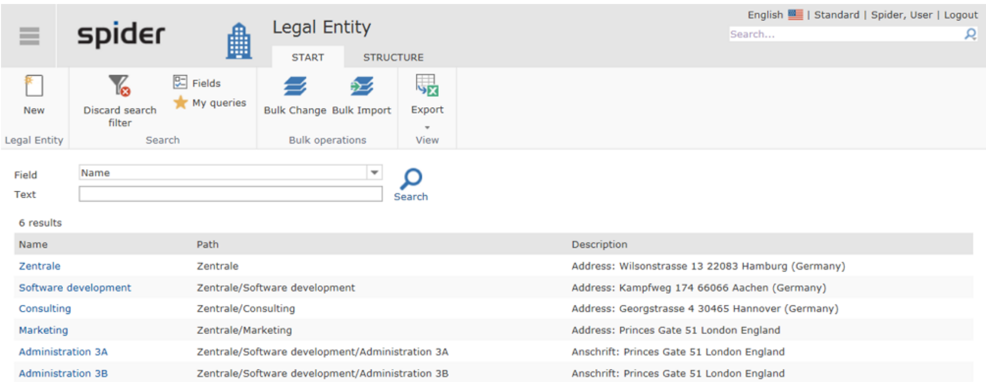
Authorized users can see all objects assigned to a legal entity and all subordinated legal entities.

In this configuration, assets, function units, licenses and contracts always must be assigned to their legal entities. Those objects which are not assigned to a legal entity are visible for all users. Special permissions are required for the assignment.

Note	The search results of all objects and reports are restricted to the authorized legal entities. Logged-in users can only see the objects which they are authorized to see.

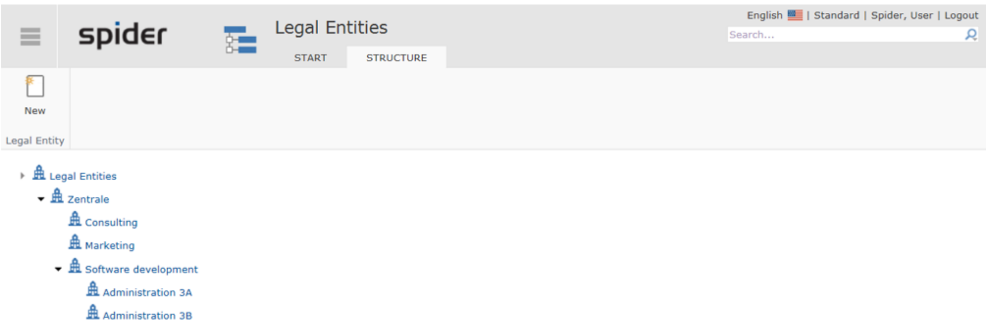
7.3.1 Edit legal entities

- For modifying entries in the section **Legal entities**, select the **System** menu on the **home page**. Click on **Legal entity** in the Administration menu area.
- Alternatively, you can select System in the **Backstage** (on page 35) and click on the menu item **Legal entity**.



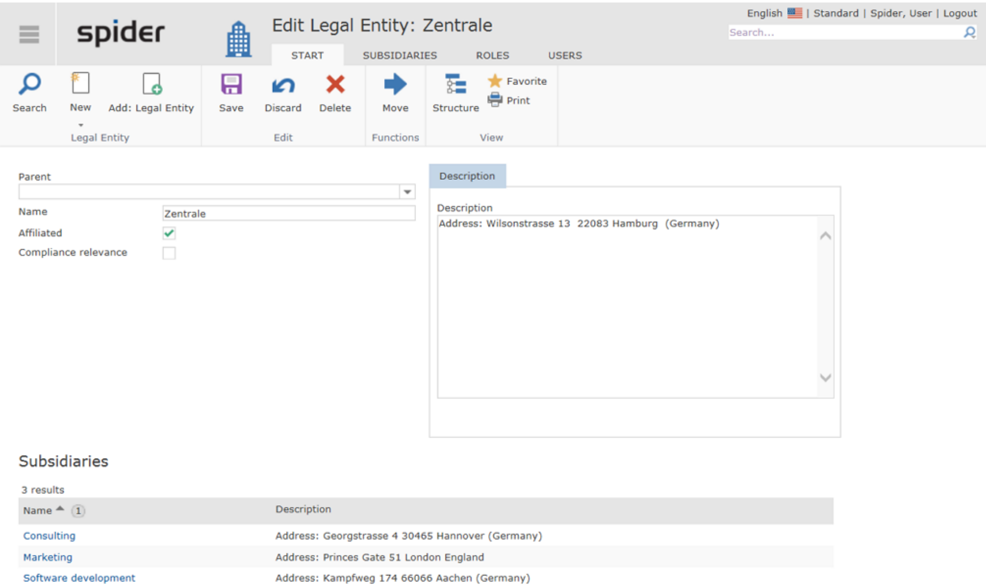
The list contains all legal entities incl. their paths. Use the filter function to further restrict the selection. A structure view is also available.

- To view the structure, click on the **Structure** ribbon.



- Select the legal entity from the list or structure view which is to be edited.

The Edit form of the corresponding legal entity will open. If you possess the required rights, you can now modify *Name* and *Description* as well as the settings *Affiliated* and *Compliance relevance*.



Use the check boxes *Affiliated* and *Compliance relevance* to make the following settings:

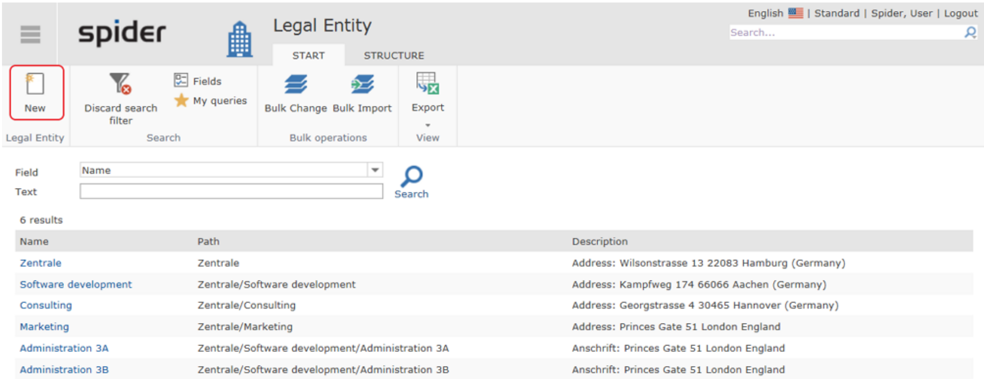
Field	Meaning
Affiliated	Specifies that a legal entity is considered as affiliated to the superior entity, i.e., there is a participation of >50%. This is important for the pooling distribution since it is carried out only among affiliated legal entities.
Compliance relevance	You can specify compliance relevance as a filter in compliance reports to limit the view to the relevant legal entities. Typically, there is a compliance relevance for all *top-level* legal entities and *all legal entities which are not affiliated*.

➢ After editing the data, click on the **Save** ribbon button to save your entered data.

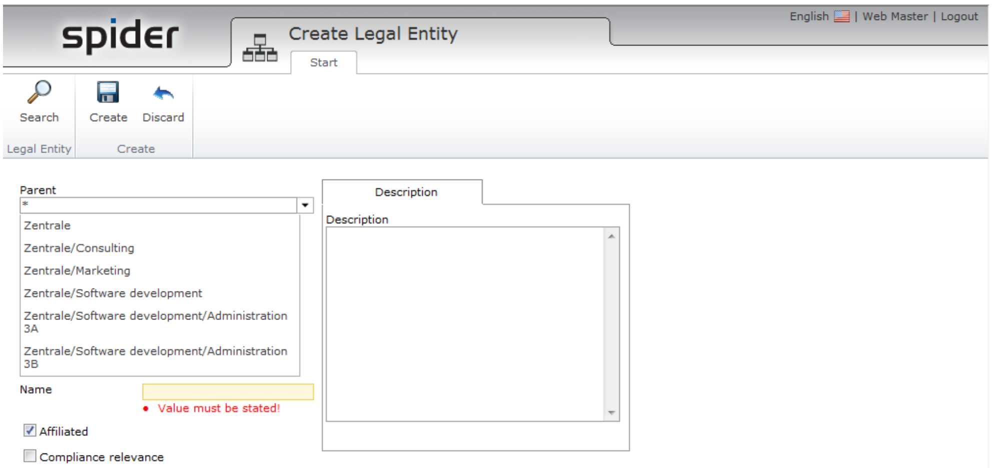
7.3.2 Create legal entities

Legal entities can be created on all levels.

- To create a new **Legal entity**, select the **System** menu on the **home page**. Click on **Legal entity** in the Administration menu area.
- Alternatively, you can select System in the **Backstage** (on page 35) and click on the menu item **Legal entity**.
- Click on the **New** ribbon button in the list or structure view to create a new legal entity.



The form for entering a legal entity will open.



- Select the legal entity from the drop-down list in the *Superordinated* field which shall be used as parent for the new legal entity.
- Enter the *name*< and other data referring to the new legal entity.
- Activate / deactivate the required check boxes and exit the process by clicking on **Create**.

Alternatively, to the procedure above, new legal entities may be created from the Edit form of an existing legal entity.

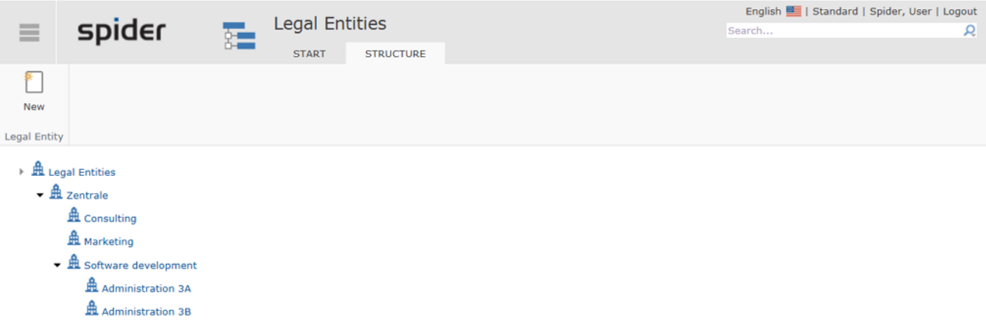
- In the Edit form, click on the ribbon button **Add: Legal entity** if the new legal entity is to be created underneath this legal entity.

or

- In the Edit form, click on the ribbon button **New** if the new legal entity is to be created on the same level.

7.3.3 Structure of legal entities

- To view the structure of legal entities, select the **System** menu on the **home page**. Click on **Structure of the legal entities** in the Administration menu area.
- Alternatively, you can select System in the **Backstage** (on page 35) and click on the menu item **Structure of the legal entities**.
- Navigate to the **Structure** ribbon.

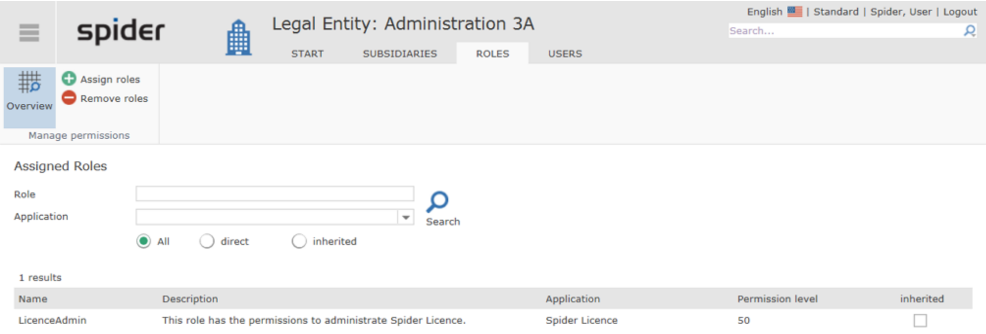


- If you click on a legal entity, its Edit form is displayed.

7.3.4 Authorize legal entities

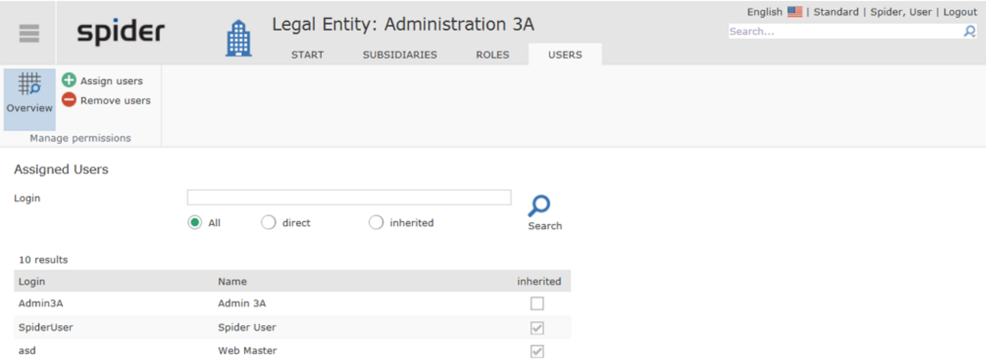
The permission for legal entities may be defined via roles or users.

- In the corresponding legal entity, go to the **Roles** or **Users** ribbons.



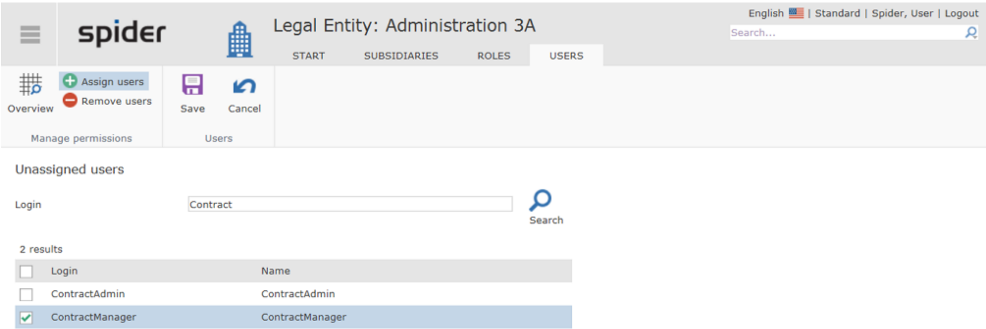
In this example, the role *LicenceAdmin* has permissions for the legal entity.

- Go to the **Users** ribbon to see which users also have permissions for this legal entity.



The direct as well as indirect permissions (permissions by inheritance) are listed.

➢ Click on the **Assign users** ribbon button if you want to add other users and have the correspond-ing permissions to do so.

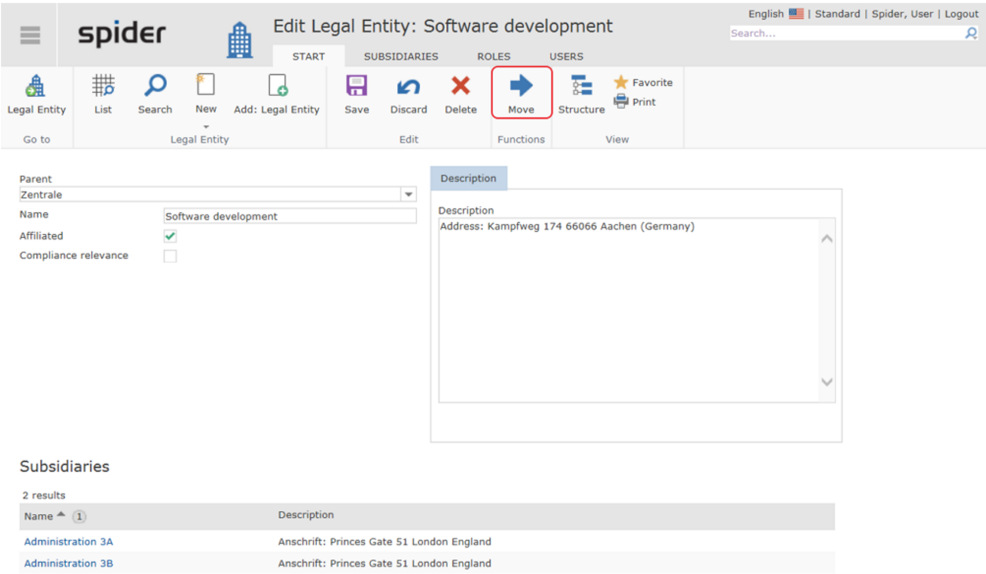


➢ Activate the check box of the user(s) which you want to add and click on **Save**.

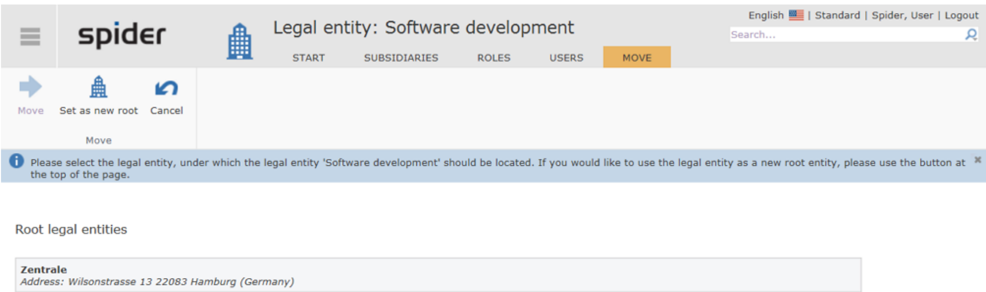
Note	The changes will only be accepted when pressing **Save**.

7.3.5 Move legal entities

In the Edit form of a legal entity, you have the possibility to move this legal entity and place it under-neath another legal entity.



➢ Click on the **Move** ribbon button.



➢ Please select the legal entity under which you want to move the legal entity.

- Click again on the **Move** button to execute the relocation.
- If you want to place a legal entity on the root level, please use the **Set as new root** ribbon button.

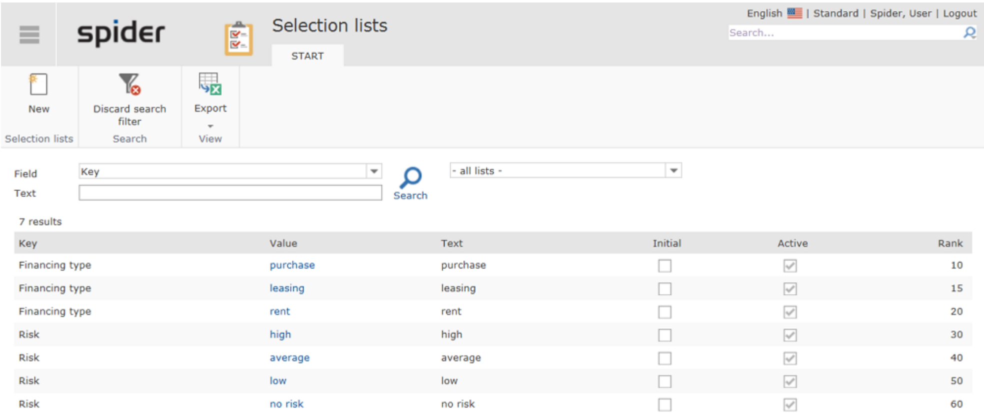
7.4 Selection lists

Spider can offer **combination fields** for many parameters and thus ensure the input of a "valid" value. The **selection lists** are assigned to a key word. For example, the keyword **risk** is assigned to a selection list with various risk levels.

Note The selection lists are module specific. In case of modifications / enhancements of the selection lists please ensure that the selection lists of the correct module are edited.

7.4.1 Search in selection lists

- Select the **selection lists** on the Spider home page in the menu section Settings.
- Alternatively, you can select the **selection lists** in the **Backstage** (on page 35).



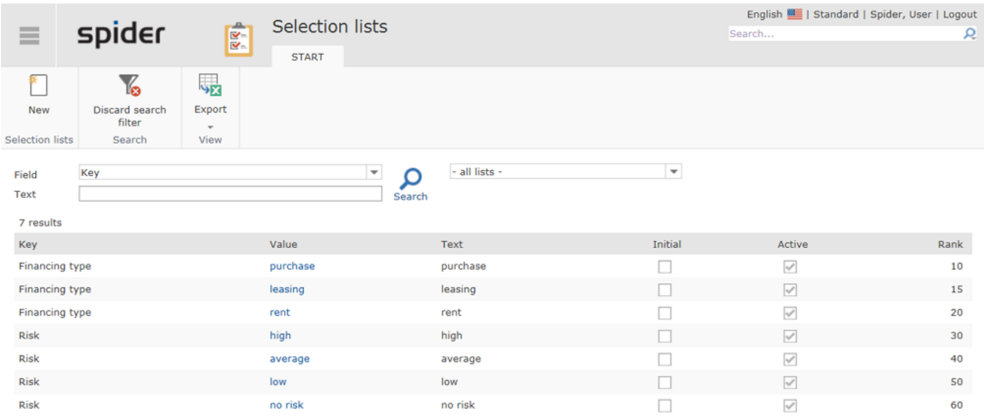
- Restrict the selection list by means of the field search or the selection list filter if required and click on the desired **entry** to view the form with detailed information.

Note It depends on the configuration which combination field uses which selection list, and this can only be changed by your administrator.

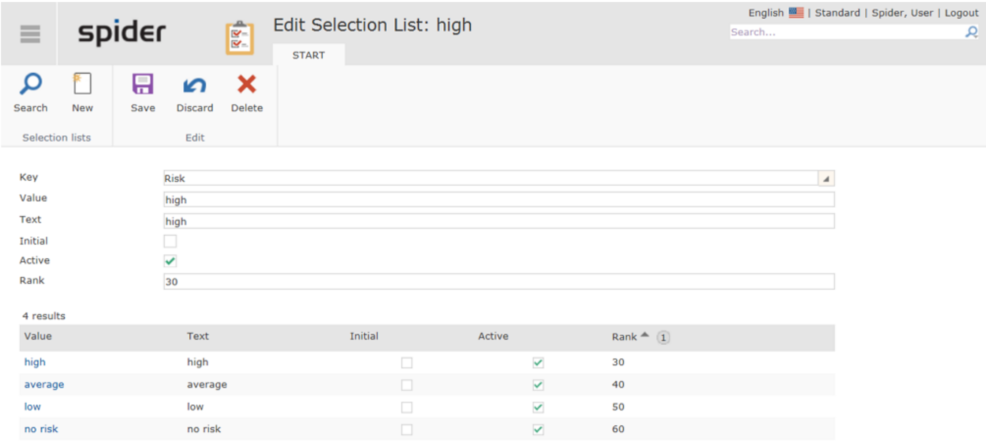
7.4.2 Edit entries for the selection list

You have the possibility to create new selection lists and to edit the corresponding keys.

- Select the **selection lists** on the Spider home page in the menu section Settings.
- Alternatively, you can select the **selection lists** in the **Backstage** (on page 35).



- Select a **value** from the list or search for an actual key by means of the **Field search**.



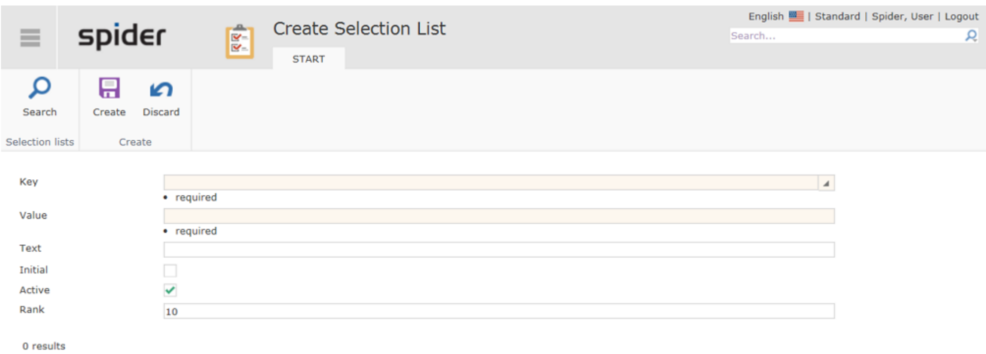
Display	Meaning
Key	Key name
Value	The field value contains the value, which is to be assigned and saved for the corresponding selected object.
Text	Enter the text to be output in the Text field.
Initial	By checking the box under Initial, you can define this value as initial value (available when objects are created).
Active	The Active field determines whether a value can be selected or not.
Rank	Use Rank to change the sorting of the list, i.e., if certain values are sorted alphabetically, you can adapt the sorting according to your personal requirements.

- After editing the data, click on the **Save** button to save your entered data.

7.4.3 Create entries for the selection list

You have the possibility to create new selection lists and to edit the corresponding keys.

- Select the **selection lists** on the Spider home page in the menu section Settings.
- Alternatively, you can select the **selection lists** in the **Backstage** (on page 35).
- Then, click on the **New** ribbon button to open the **Create selection list** form.



- Click on the **Save** button to save your input.

CHAPTER 7

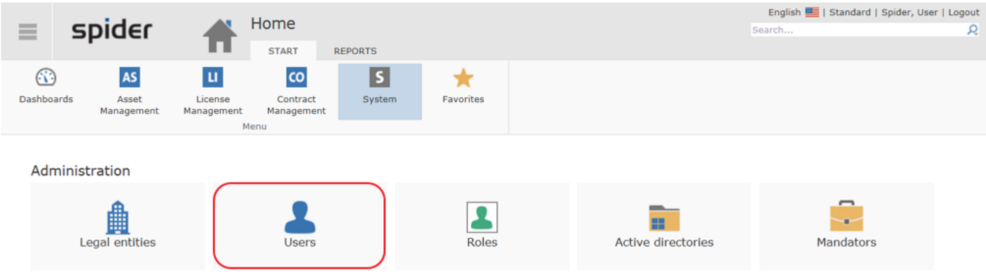
User management

8.1 Users

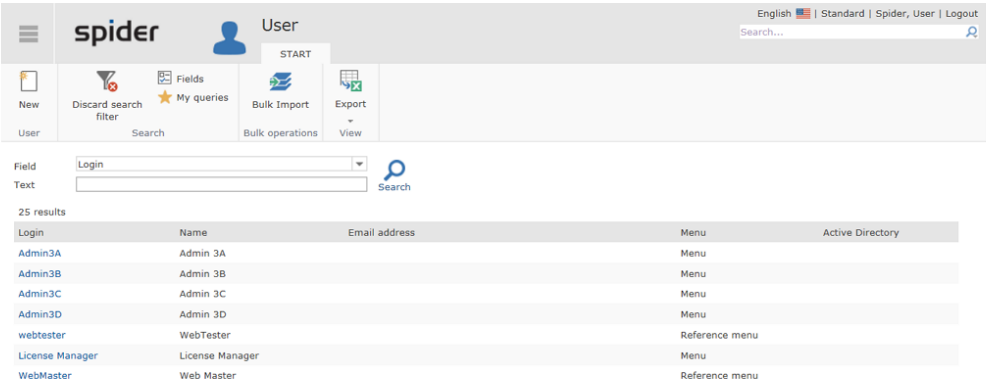
To be allowed to work with Spider, the corresponding person must be specified as user in Spider Core. If your company uses the Active Directory services (short: AD), it is recommended to link this to the user management of Spider. In Spider, the user roles are assigned to the specified users, or the users assigned from the AD which in turn have their role-specific rights.

8.1.1 Editing users

- On the home page of Spider System, go to the management menu area or click on the menu item **Users** (see "**Backstage**" on page 35) in the **Backstage**.

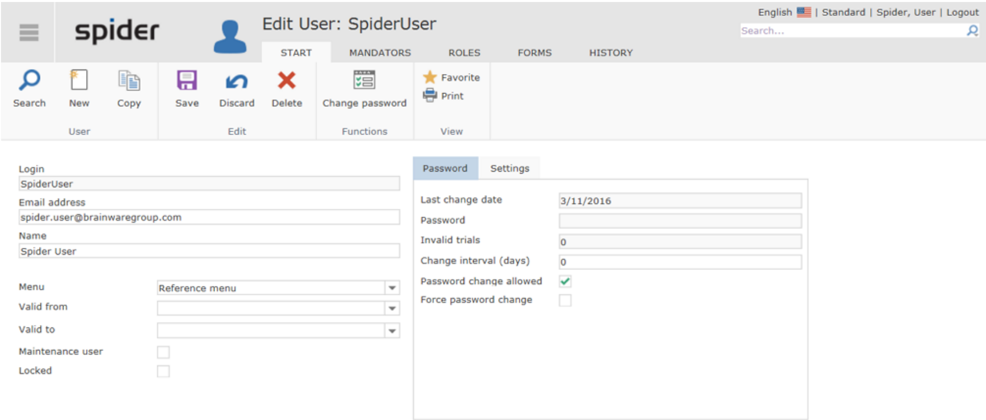


The entered users are listed in the search form.



If required, the search can be further limited by using the filter function.

- In the **Login** column, click on the user to be edited.

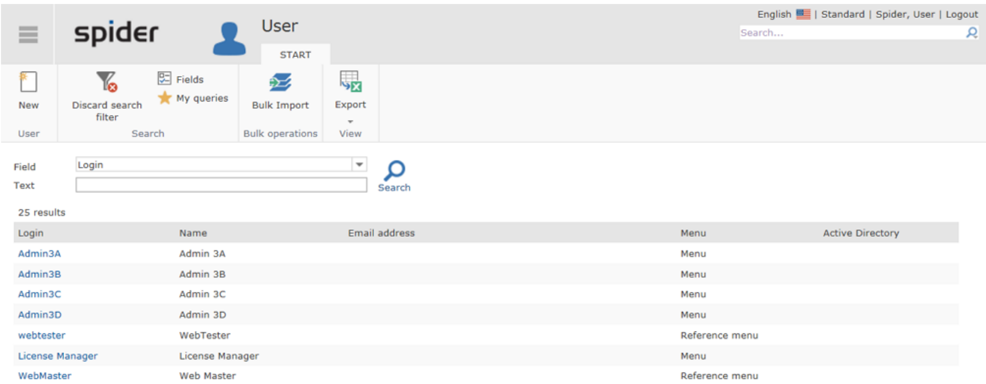


- Make the changes and complete the process by clicking on the **Save** ribbon button.

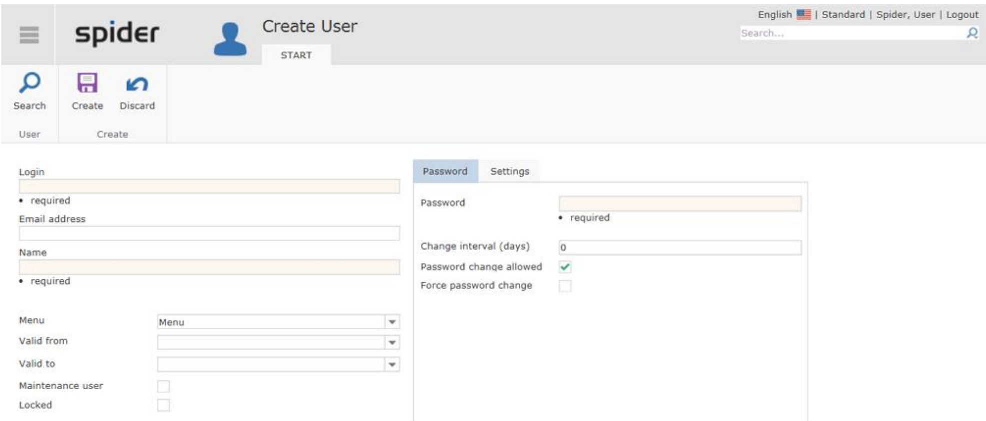
8.1.2 Create users

- To create a user entry, click on the menu item **Users** on the home page of Spider System in the management menu area or in the **Backstage** (on page 35).

The entered users are listed in the search form.



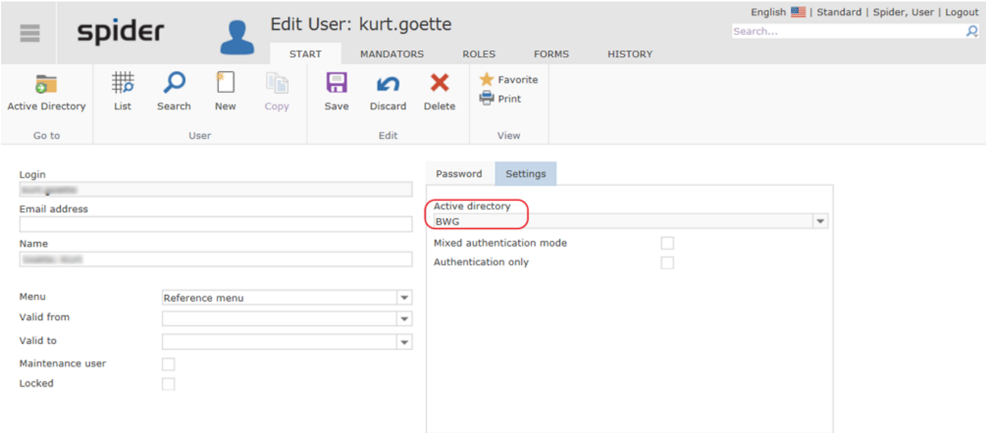
- To create a new user, click on the **New** ribbon button.



- Fill in at least the mandatory fields and complete the process by clicking on the **Create** ribbon button.

8.1.3 Assign Active Directory

If the new user also exists in the Active Directory, go to the Settings ribbon, and select the corresponding AD in the *Active Directory* field.

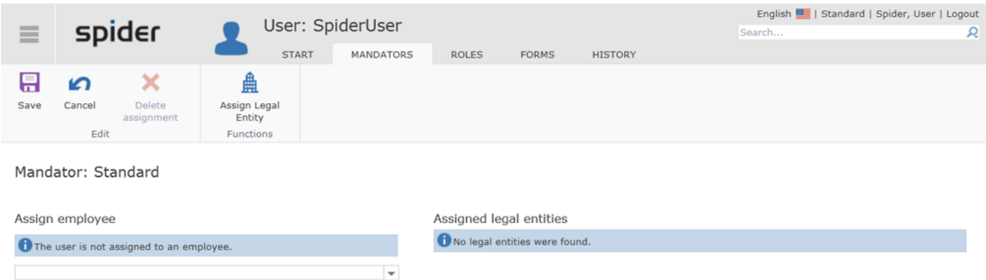


➢ Click on the **Save** ribbon button to complete the process.

Note	Users with AD-Connectivity may have a valid to date. These users can switch to an inactive state even if they are currently reported by AD-Connector

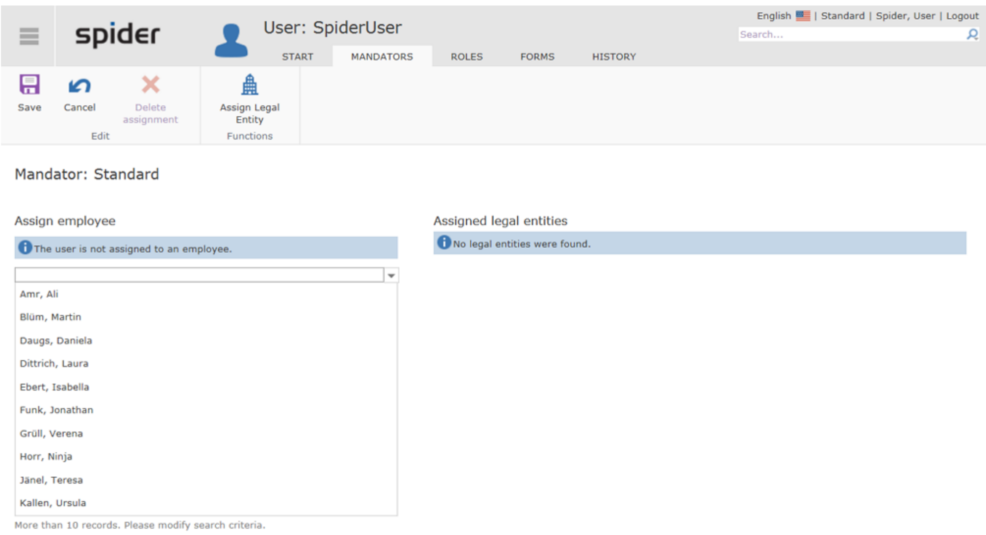
8.1.4 Mandators ribbon

➢ In the Edit form of the user, go to the **Mandators** ribbon.



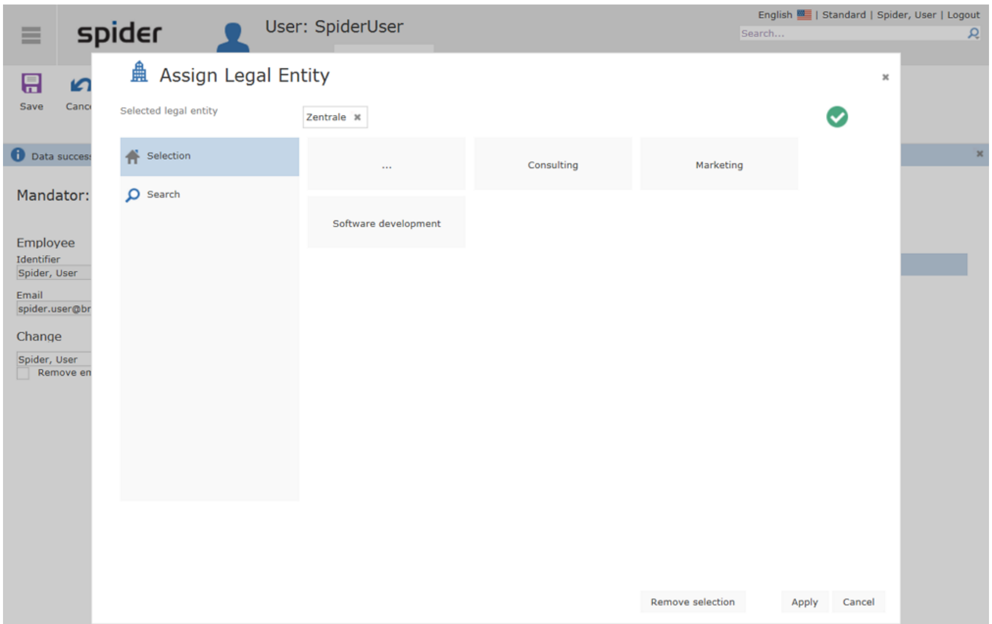
Employees and legal entities can be assigned for each mandator and user.

➢ Open the drop-down list to select an employee.



➢ Click on the **Save** ribbon button to complete the assignment.

➢ Click on the **Assign legal entity** ribbon button to assign a legal entity.



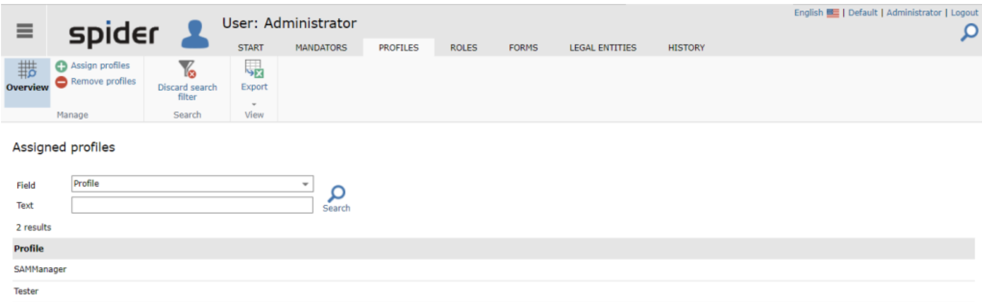
➢ Select the corresponding legal entity and complete the process by clicking on the **Apply** button.

Note	The green tick confirms that a correct assignment is possible. If the user has no rights for a legal entity, he is not allowed to make an assignment (there is no green tick).

8.1.5 Profiles ribbon

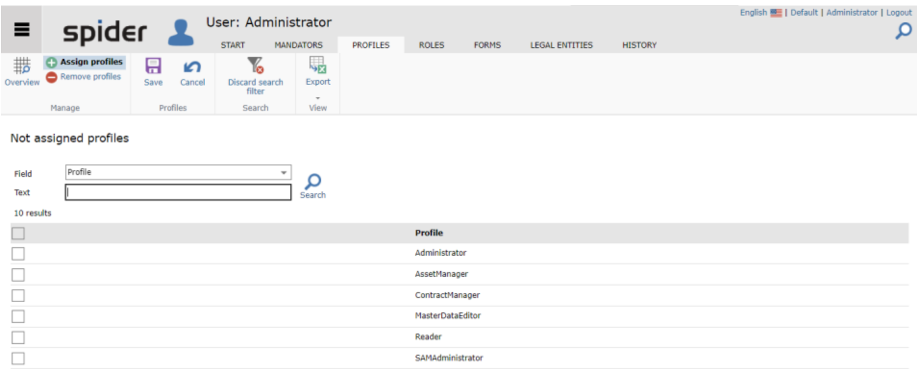
Users can be assigned to user profiles. User profiles group roles together and simplify user administration.

➢ Switch to the Profiles tab in the user's Edit form.



The user profiles that are assigned to the user are listed.

➢ To add more user profiles, click on the ribbon button **Assign profiles**.



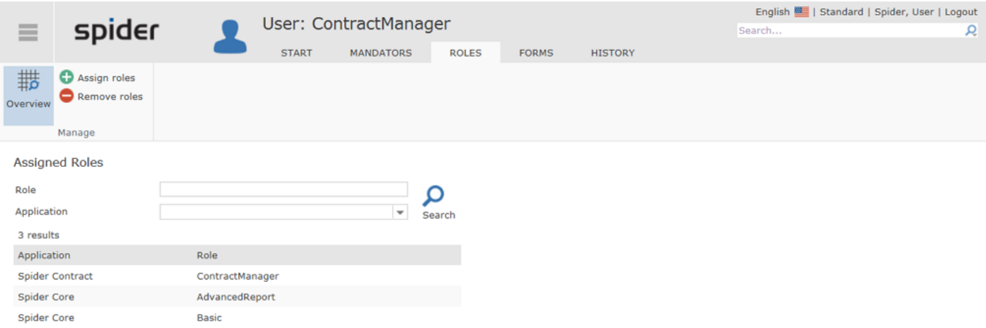
- By activating the checkbox, you select the profiles that are to be assigned to the user.
- Click the **Save** or **Cancel** ribbon button to complete the process.

The same procedure applies to remove user profiles:

- Click on the ribbon button **Remove** profiles, select the Profiles you want to remove by activating the checkbox and click **Save** or **Cancel** to complete the action.

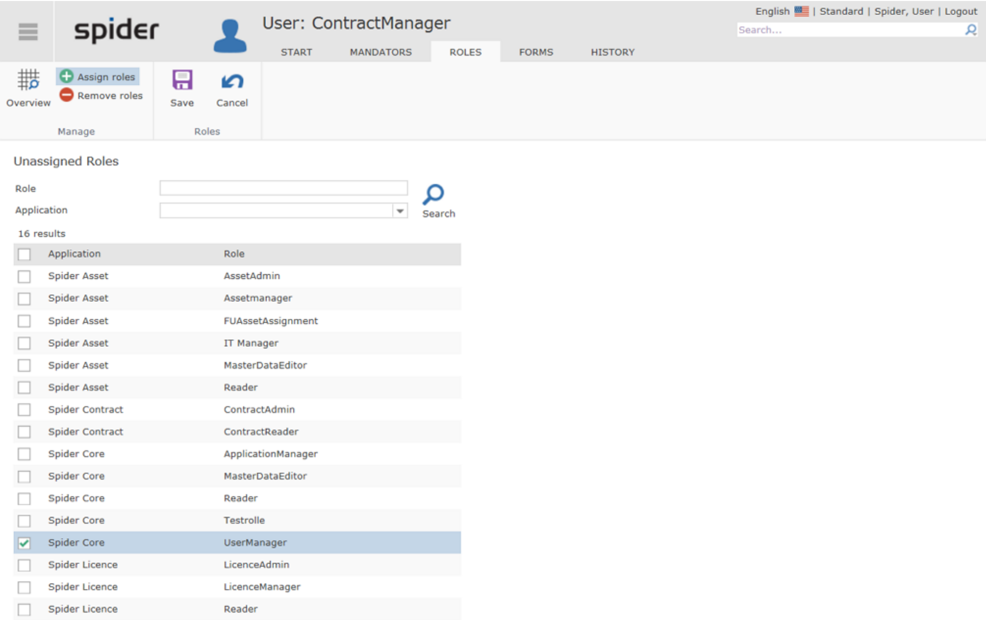
8.1.6 Roles ribbon

- In the Edit form of the user, go to the **Roles** ribbon.



All roles assigned to the user are listed.

- To add more roles, click on the **Assign roles** button.



- Select the roles which shall also be assigned to the user by activating the **check box**.
- Click on the **Save** or Cancel ribbon button to complete the process.

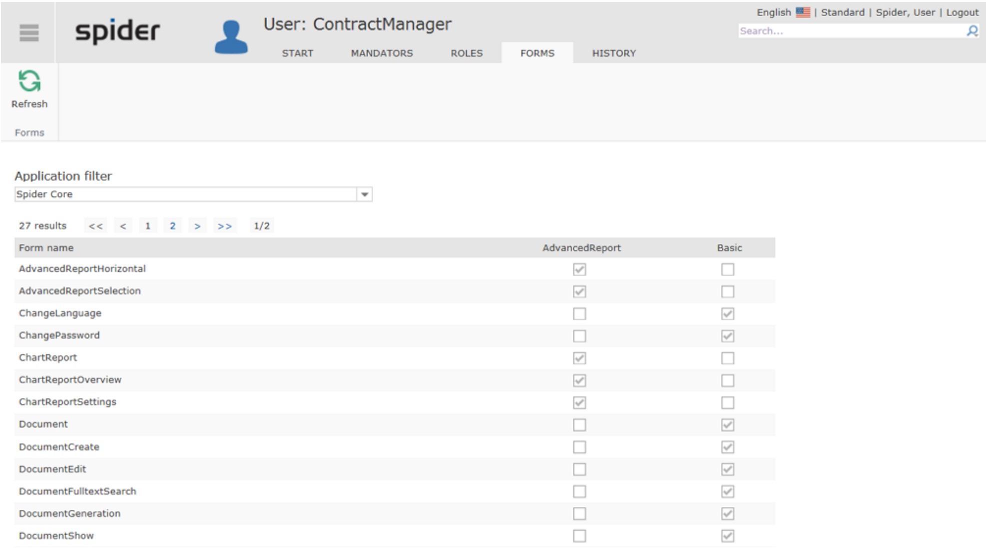
The same procedure applies also for removing roles.

- To do this, click on the **Remove roles** ribbon button.

8.1.7 Forms ribbon

To make available the web sites which the user needs for his work, the related forms are assigned to each role.

➢ Go to the **Forms** ribbon to see which forms are assigned to each role.



The forms are filtered by applications using the application filter.

8.2 Password rules

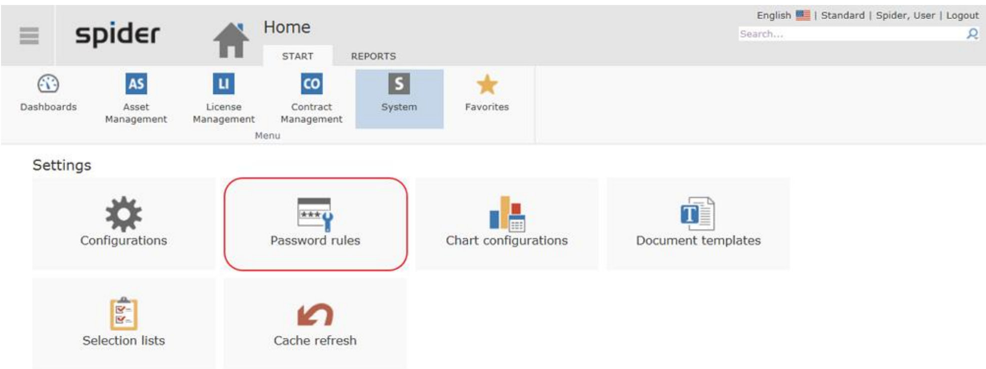
In Spider Core, you can configure password rules which define the complexity of the passwords used in Spider. Thus, the security of the data managed by Spider can be configured according to the company's security standards.

The password rules are defined according to regular expressions. If a new password does not fulfill all active password rules, the user will be requested to enter another password.

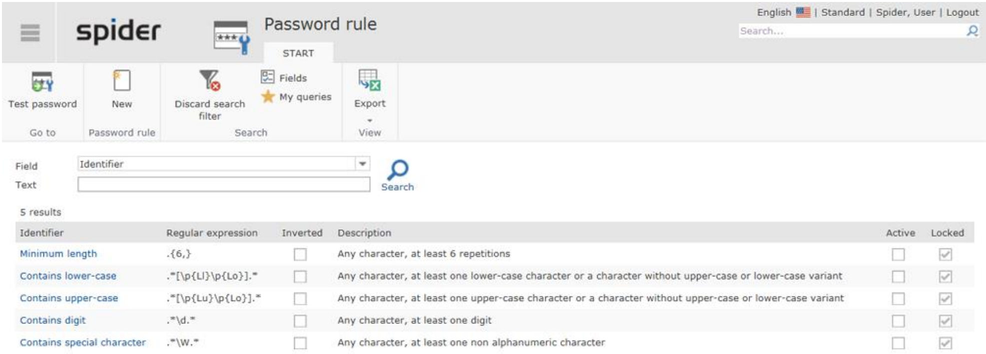
The default configuration of Spider Core already comprises 5 rules which may, but need not, be used. Therefore, the rules are not activated for the installation.

8.2.1 Edit password rules

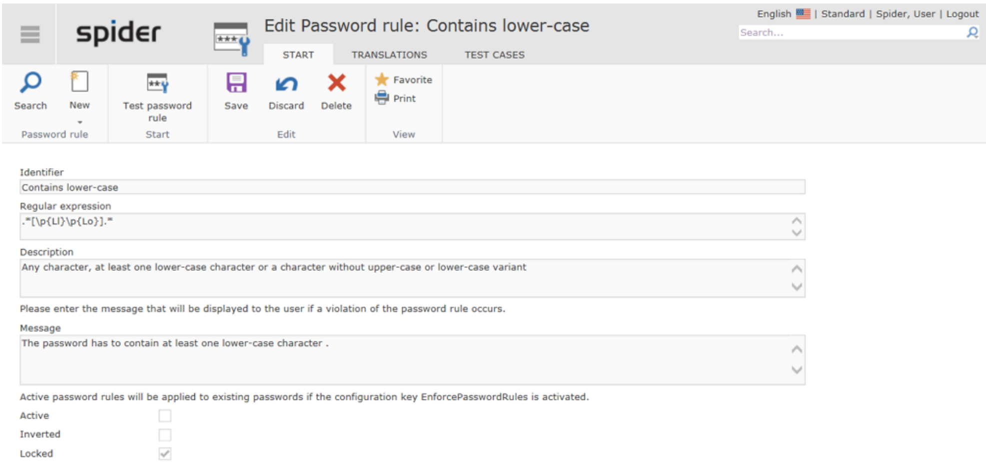
➢ On the home page of system, select the menu item **Password rule** in the *Administration* menu area or in the **Backstage** (on page 35).



The password rules are listed in the search form.



➢ Select a password rule or refine the search via the Filter function.

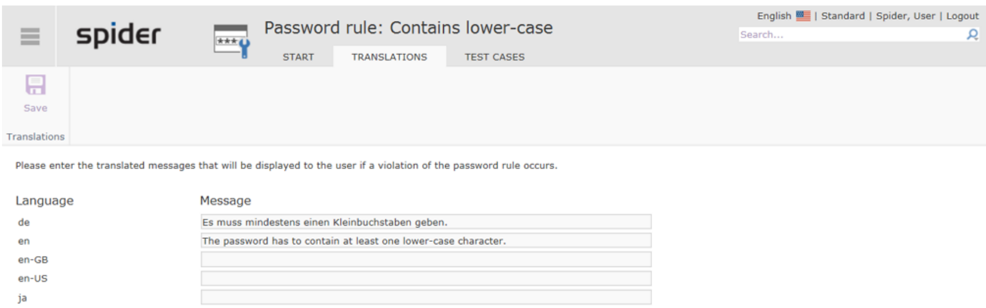


If you possess the required permissions, you can edit the password rule.

List of regular expressions, see https://msdn.microsoft.com/de-de/library/az24scfc(v=vs.110).aspx

8.2.2 Translations ribbon

➢ In the Edit form of the password rule, go to the **Translations** ribbon.



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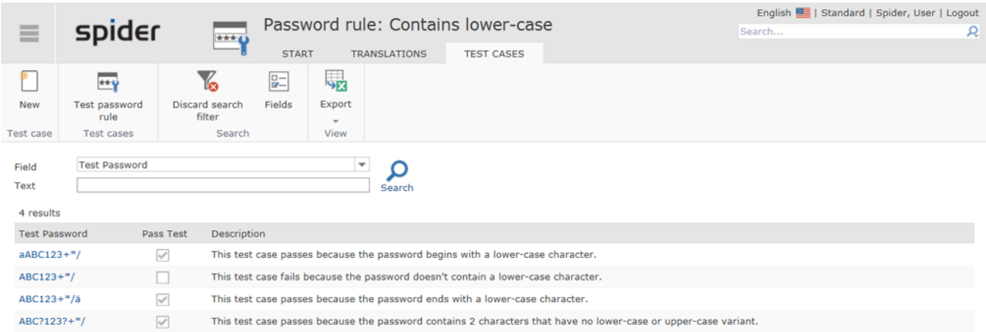
If you possess the required permissions, you can define here alternative message texts for different language settings.

8.2.3 Test cases ribbon

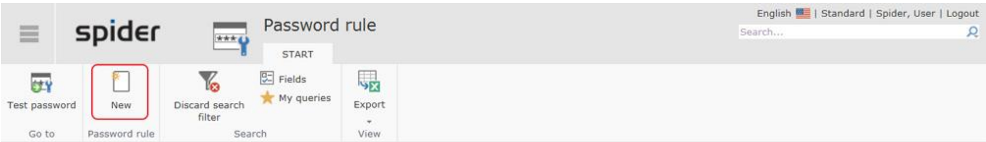
➢ To see which test cases are assigned to each password rule, go to the **Test cases** ribbon.



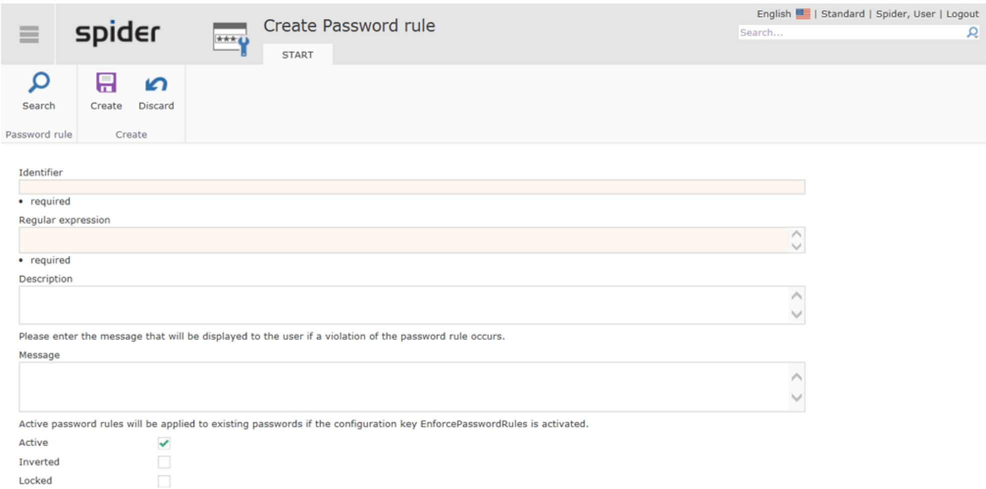
If you possess the required permissions, you can edit certain test cases, **create** (see "**Create password rules**" on page 334) new test cases and **test** (see "**Test password rules**" on page 336) all test cases using the password rule.

8.2.4 Create password rules

➢ Click on the **New** ribbon button in the password rule search to create a new password rule.



The form for entering the password rule data will open.



➢ Fill in the corresponding fields and click on the **Create** button to save your entered data.

The requested data fields are marked as mandatory fields.

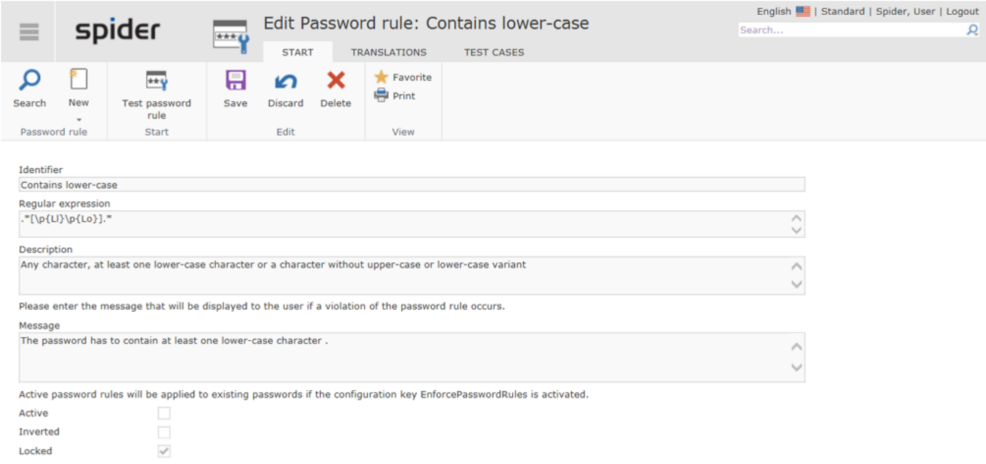
Duplicate password rule

You can create a new password rule also in the Edit form of an existing password rule.

You can select whether the values of the existing password rule should be used or whether a new password rule should be created without pre-filled fields.

➢ Click on the small arrow in the **New** ribbon button.

Use the Accept values function to create an identical rule without identifier. The pre-filled fields can be modified as required.

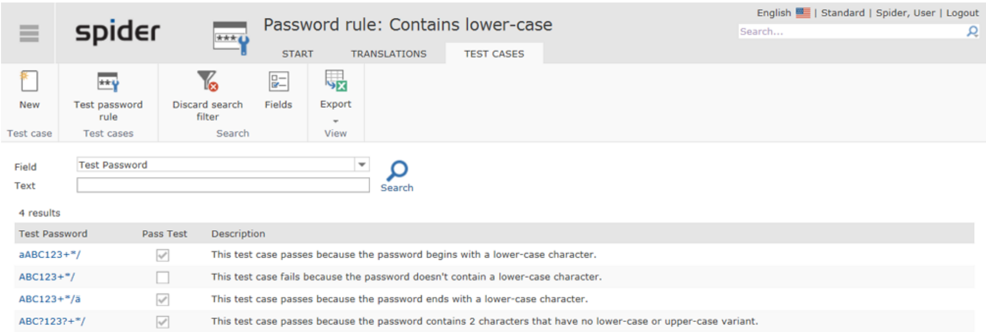


8.2.5 Test cases

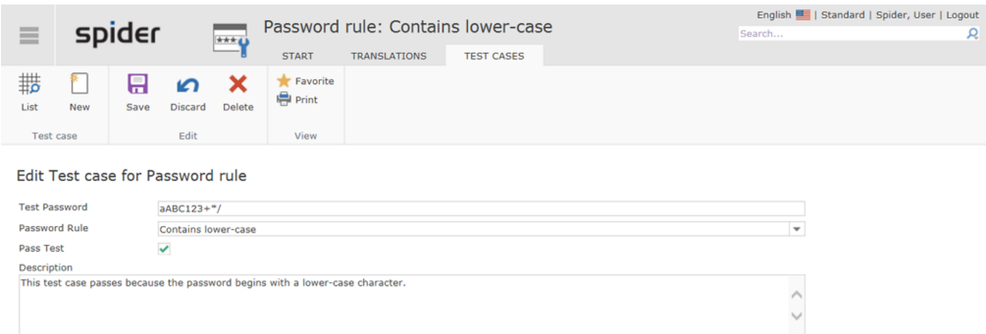
Test cases allow you to define sample passwords according to a password rule and to determine what test result is expected. To check whether your password rules work as desired, you can afterwards execute all test cases simultaneously.

8.2.6 Edit test cases

➢ In the Edit form of a password rule, select the **Test cases** ribbon to go to the test case search for this password rule.



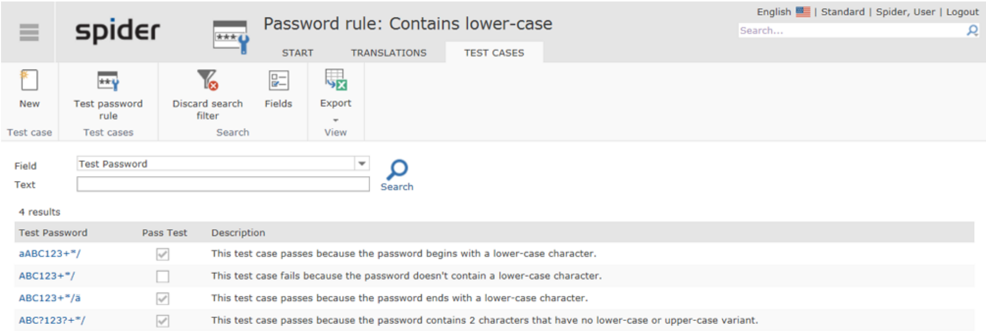
➢ Select a password rule or refine the search via the Filter function.



➢ Complete the editing of the fields, by clicking on the **Save** ribbon button.

8.2.7 Create test case

- Click on the **New** button in the test case search or in the Edit form of a test case to create a new test case.



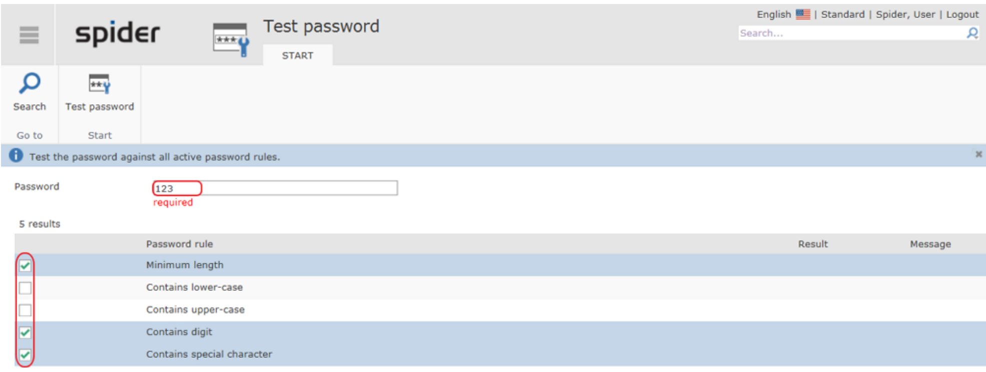
The form for entering the test case data will open.

- Fill in the corresponding fields and click on the **Create** button to save your entered data.

8.2.8 Test password rules

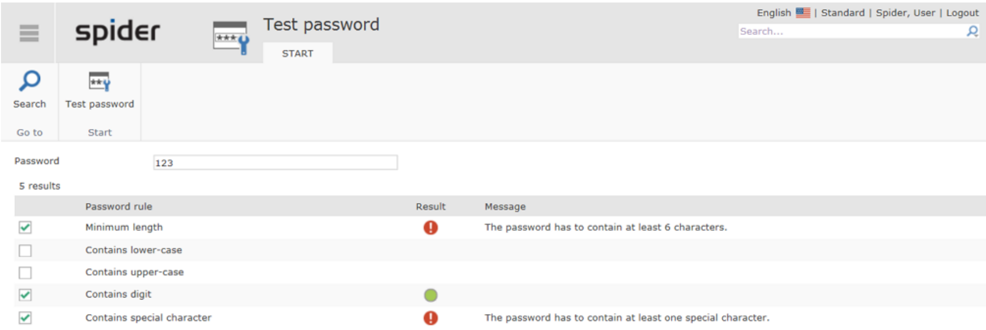
- Click on the **Test password** ribbon button in the search form *Password rule* or **Test password rule** in the form *Edit password*.

The test procedure depends on the source page. If you have used the *Password rule* search form, you will see a list of existing password rules and can select the password rules to be used for testing the entered password.



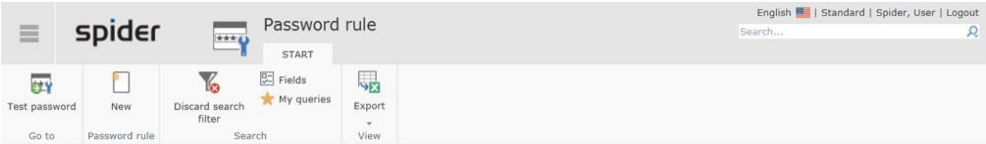
- Enter the password and enable the rules to be used for checking the password by activating the corresponding **check boxes**.
- Then, click on the **Test password** ribbon button.

If you have been within a certain password rule, the defined test cases and the entered password are tested using this password rule only.



8.2.9 Navigation

The ribbon offers you the following navigation options:



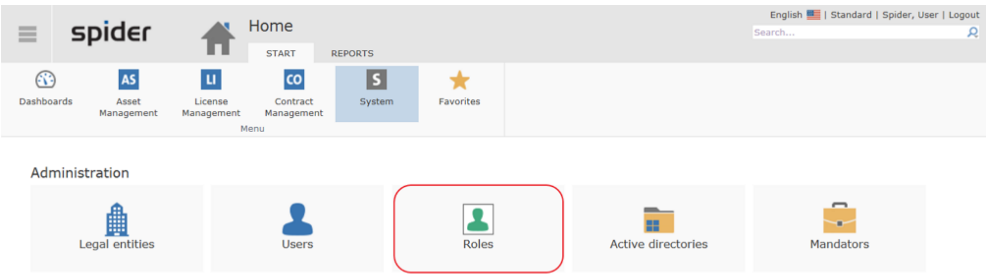
Ribbon group	Ribbon button	Function
Go to	Test password	Navigates directly to the page for testing passwords.

8.3 User Roles

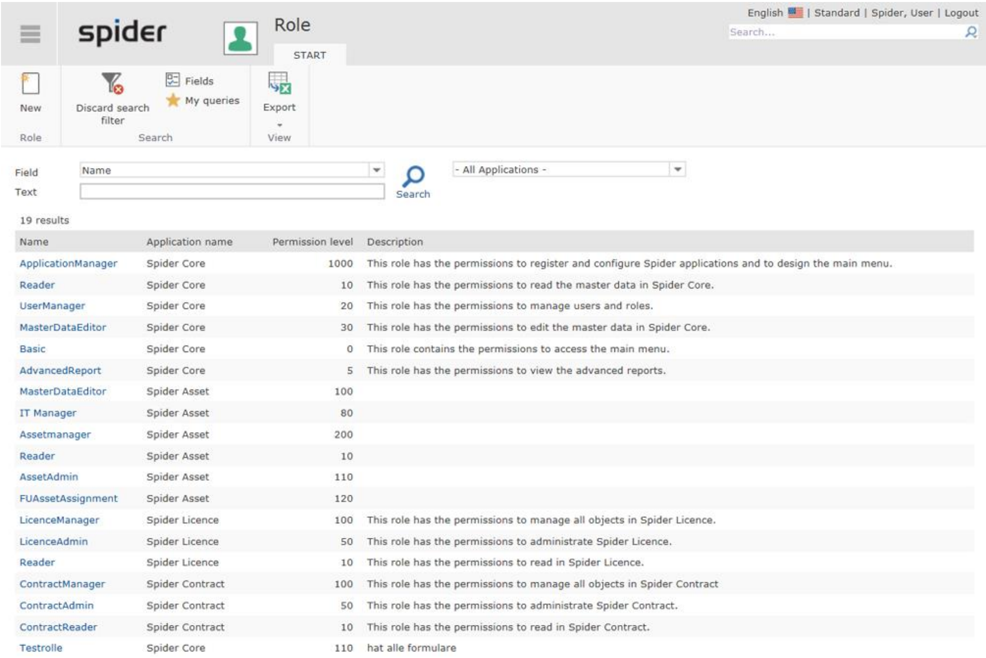
Use the User role object to define which rights are available for the corresponding role in a certain application.

8.3.1 Edit user roles

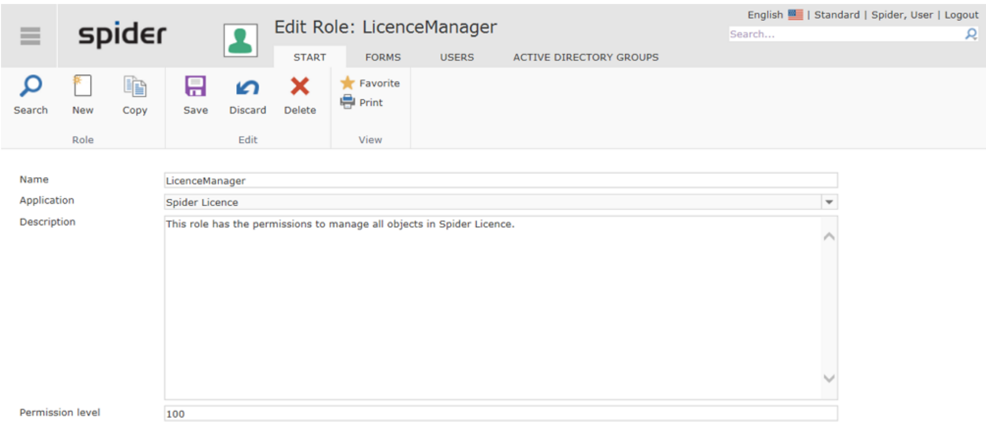
➢ On the home page of system, select the menu item **User roles** in the *Administration* menu area or in the **Backstage** (on page 35).



The search will list all available roles.



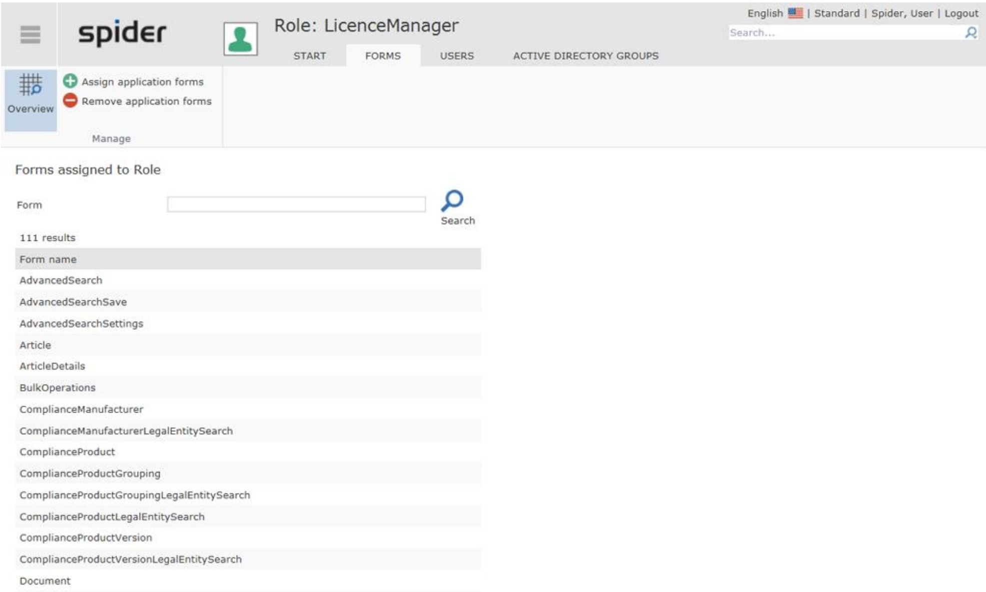
➢ Then click on the role you want to edit.



If you possess the required permissions, you can edit the user role.

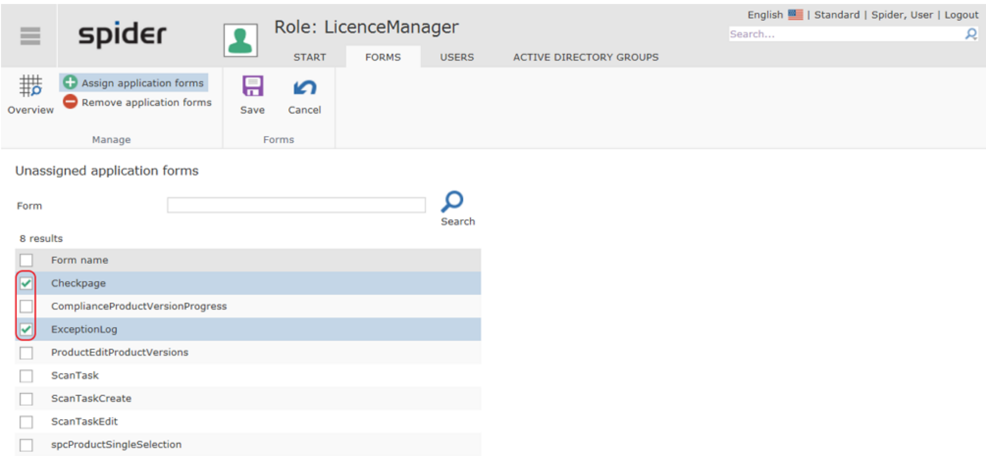
8.3.2 Forms ribbon

➢ In the Edit form of the user role, go to the **Forms** ribbon.



All forms which are assigned to this role are listed.

➢ Click on the **Assign application forms** ribbon button to add more forms.



➢ Activate the **check box** to select the forms which shall also be assigned to the role.

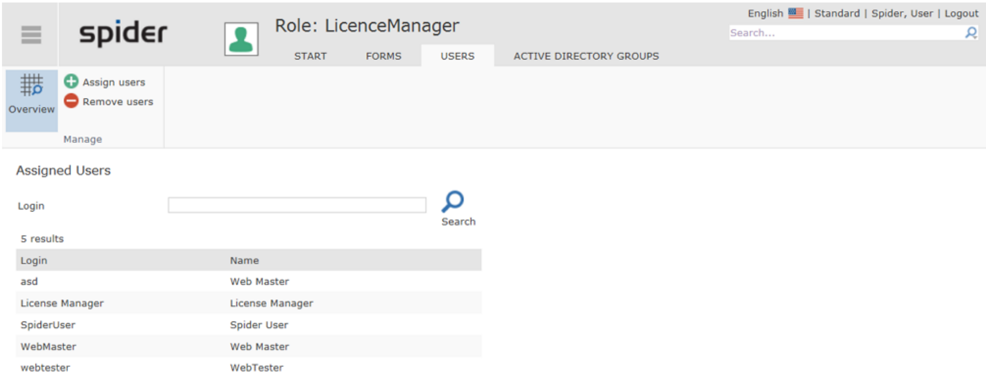
➢ Click on the **Save** or Cancel ribbon button to complete the process.

The same procedure applies also for removing forms.

➢ To do this, click on the **Remove application forms** ribbon button.

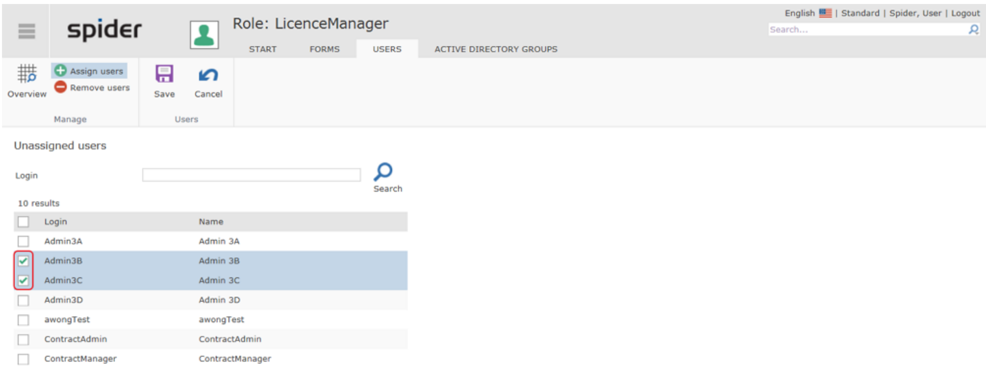
8.3.3 Users ribbon

- ➢ In the Edit form of the user role, go to the **Users** ribbon.



All users which are assigned to this role are listed.

- ➢ Click on the **Assign user** ribbon button to add more users to the role.



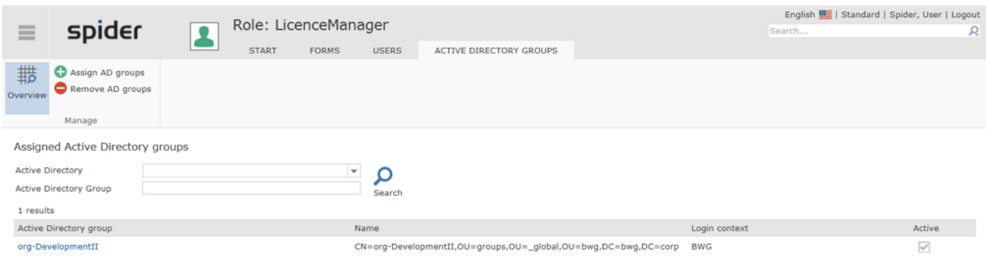
- ➢ Activate the **check box** to select the users which shall also be assigned to the role.
- ➢ Click on the **Save** or Cancel ribbon button to complete the process.

The same procedure applies also for removing users.

- ➢ To do this, click on the **Remove users** ribbon button.

8.3.4 Active Directory groups ribbon

- ➢ In the Edit form of the user role, go to the **Active Directory groups** ribbon.



The assigned Active Directory groups are listed.

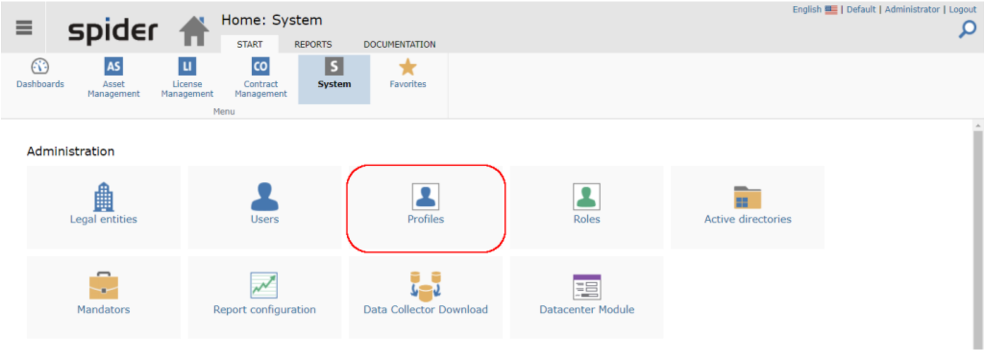
- ➢ Click on the **Assign AD groups** ribbon button to assign more groups.

8.4 Profiles

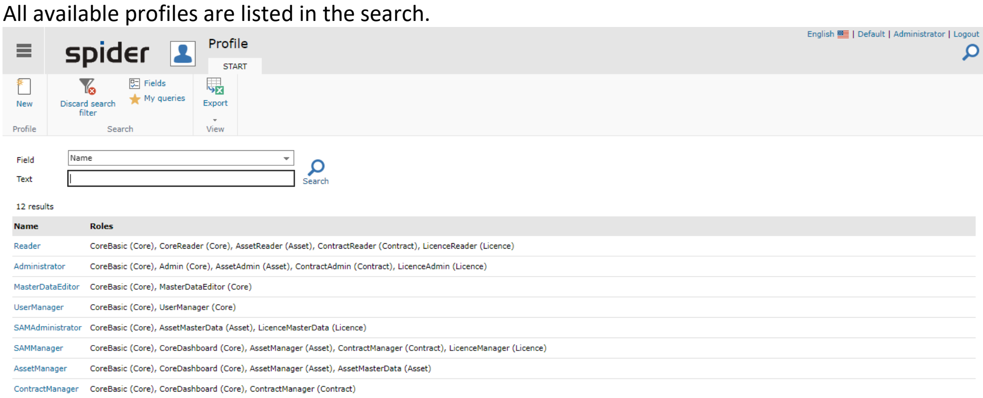
A user profile combines user roles across modules, so that users do not have to be assigned individual roles, but only one profile.

8.4.1 Edit Profiles

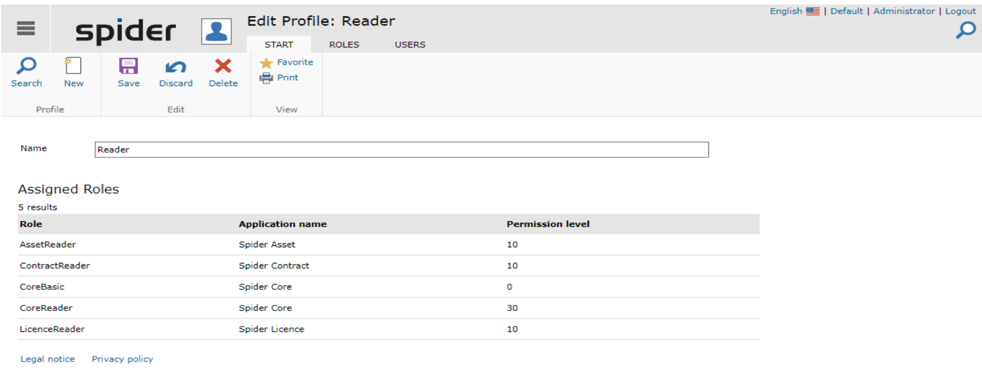
➢ On the Spider System page, click on the **Profiles** menu item in the *Administration* menu area or in **Backstage** (see "**Backstage**" on page 35).



All available profiles are listed in the search.



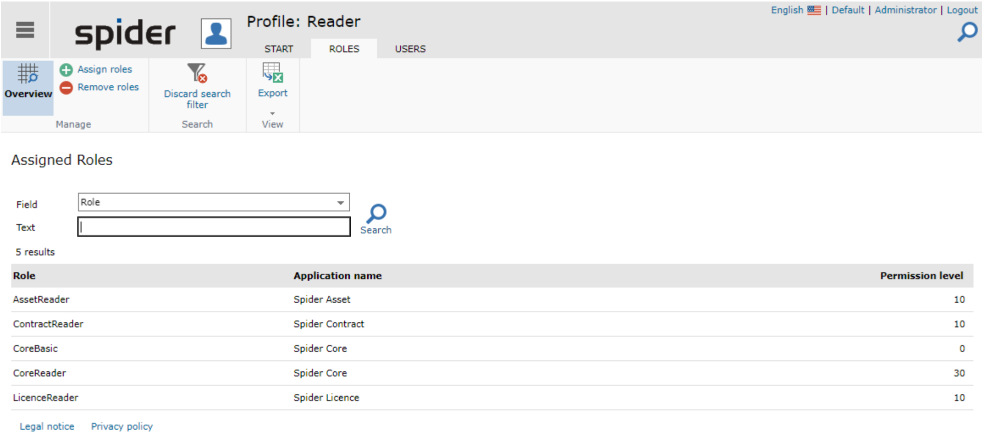
➢ Click the name of the profile you want to edit.



If you have the necessary permissions, you can edit the user profile.

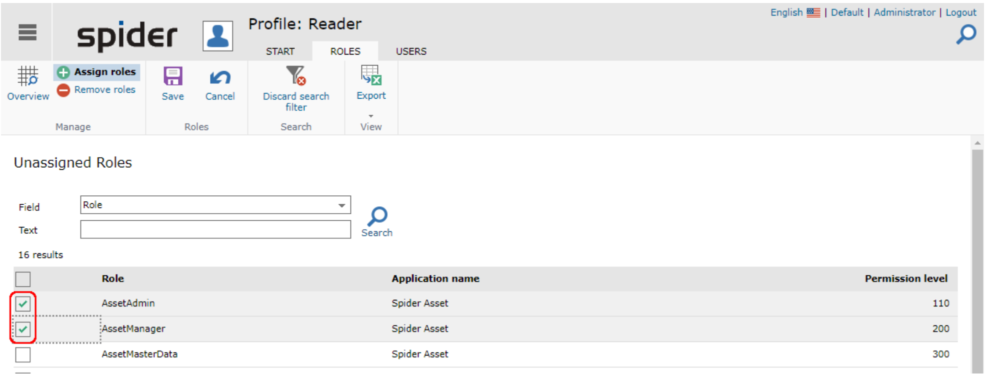
8.4.2 The “Roles” tab

➢ In the Edit form of the user profile, switch to the Roles tab.



All roles that are assigned to this profile are listed here.

➢ To assign more roles to the profile, click on the **Assign roles** ribbon button.



➢ By activating the checkbox, you select the roles that are to be assigned to the profile.

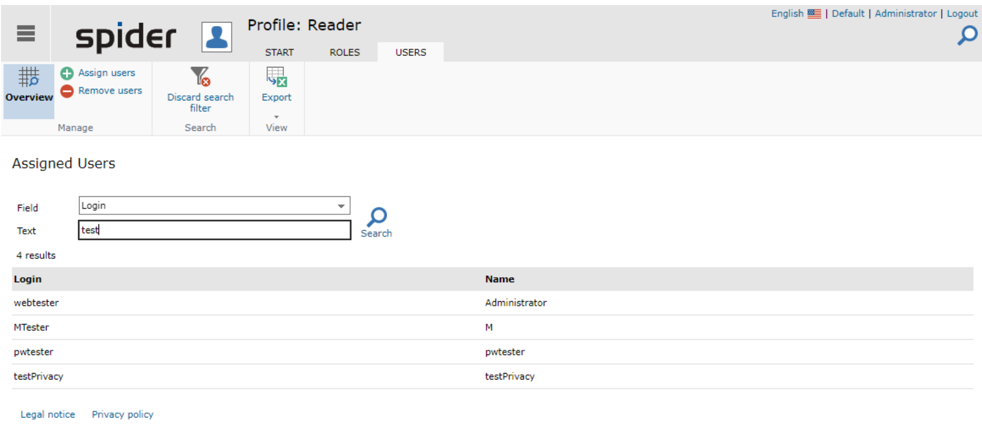
➢ Click the **Save** or **Cancel** ribbon button to complete the process.

The same procedure applies to remove roles:

➢ Click the **Remove roles** ribbon button, select the roles to be removed and complete the process by clicking **Save** or **Cancel**.

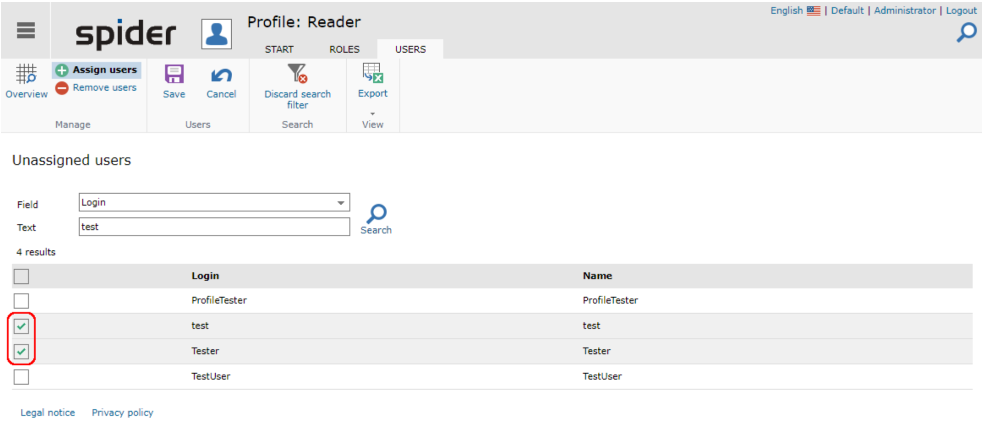
8.4.3 The “Users” tab

➢ In the Edit form of the user profile, switch to the Users tab.



All users assigned to this profile will be listed. Here the list is filtered and displays Logins with “test”.

➢ To assign further users to the profile, click on the ribbon button **Assign users**.



➢ By activating the checkbox, you select the users which should still be assigned to the profile.

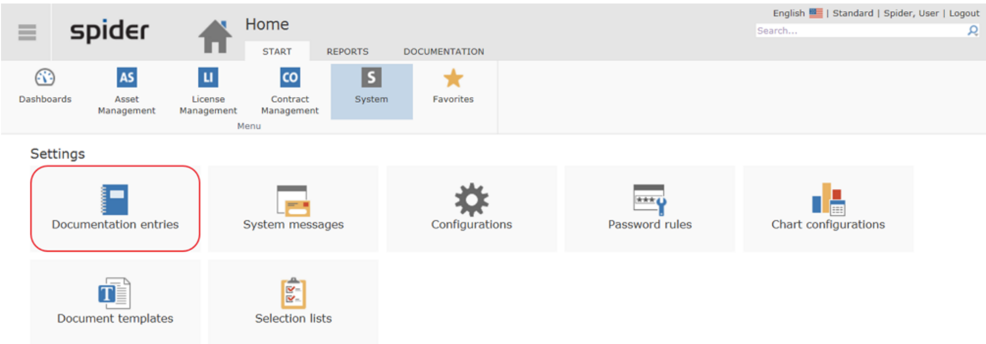
➢ Click the **Save** or **Cancel** ribbon button to complete the process.

The same procedure is used to remove users.

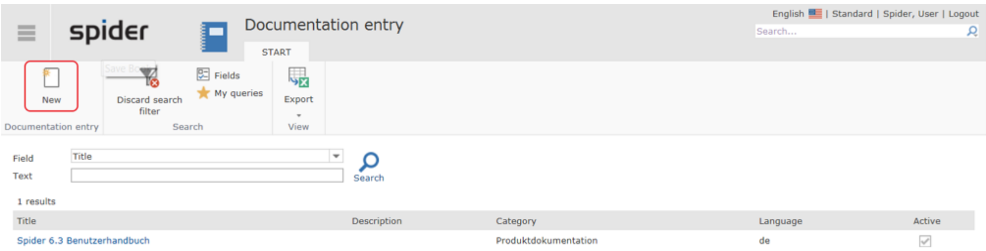
➢ Click on the ribbon button **Remove users**, select the users to be removed and complete the process by clicking **Save** or **Cancel**.

8.5 Documentation entries

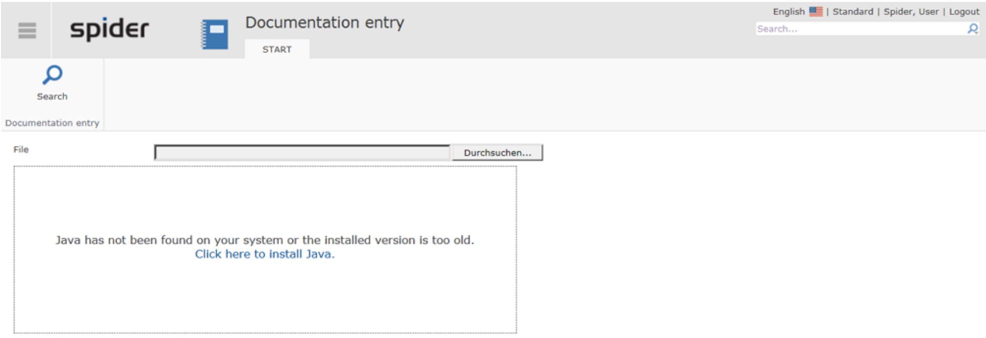
Use this function to embed documentation such as user manuals.



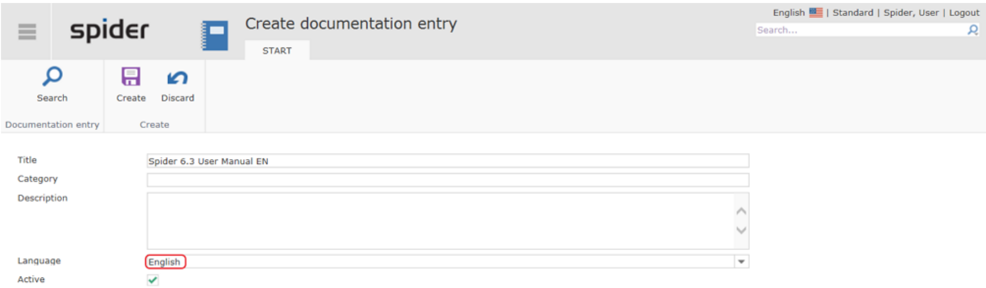
➢ On the home page of Spider System, go to the *Settings* menu area or click on the menu item **Documentation entries** in the **Backstage** (on page 35).



➢ To upload a documentation, click on the **New** ribbon button.



➢ After clicking on the **Search** button, select the document from the directory structure which is to be uploaded.



➢ Select the folder from the Category field which shall be used for saving the document or add a new category.

Note	If you select a language, the documentation will only be available for those uses, which operate their system in the corresponding language. If no language is selected, the documentation will be available regardless of the operating mode, e.g., DE or EN.

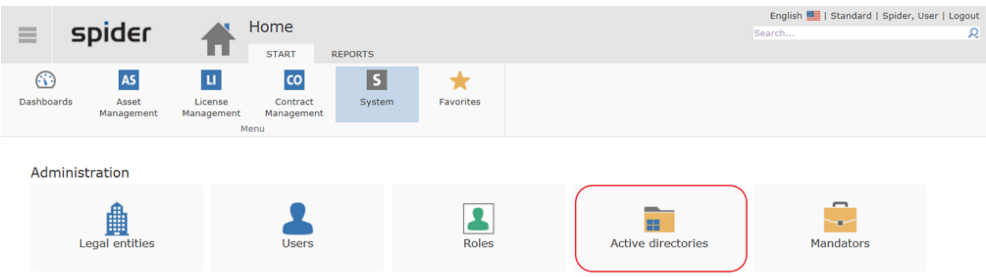
➢ Click on the **Create** ribbon button to complete the process.

8.6 Active Directory

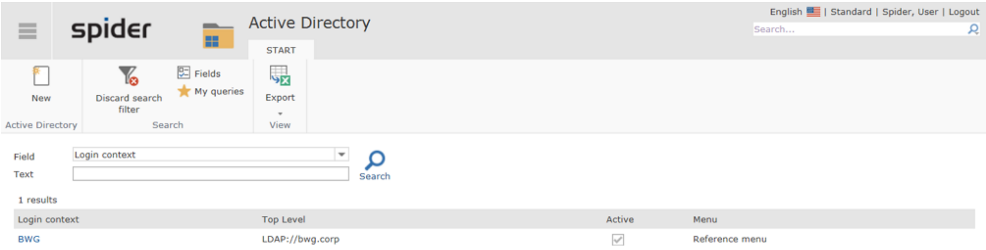
With the aim of an automatic access of *AD-Users* to Spider (Single Sign-on) and to determine which roles they are assigned to in Spider, the following assignments must be made.

8.6.1 Set up Active Directory

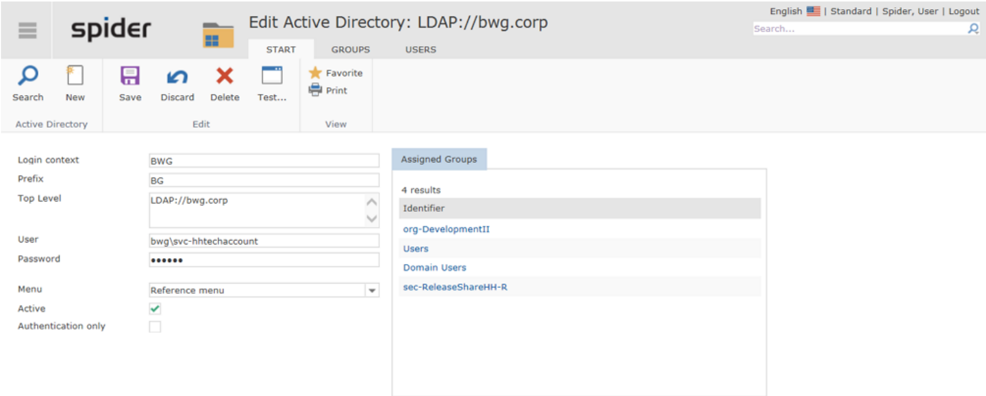
➢ On the home page of Spider System, click on the menu item **Active Directory** in the administration menu area or in the **Backstage** (on page 35).



If several Active Directories are available, they will be listed in the search form.



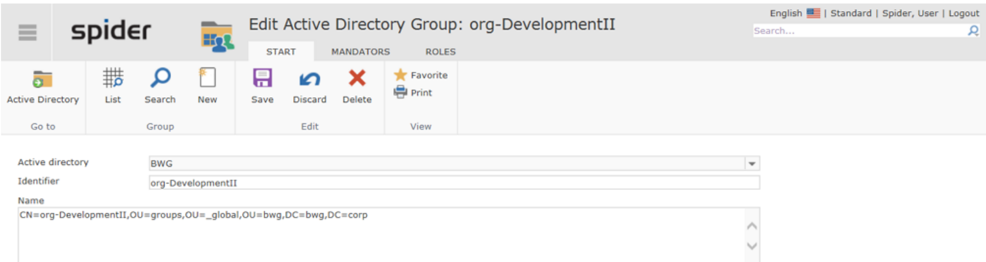
➢ In the **Login context** column, click on the Active Directory which shall be used to assign an AD group to a certain mandator.



The available groups are listed.

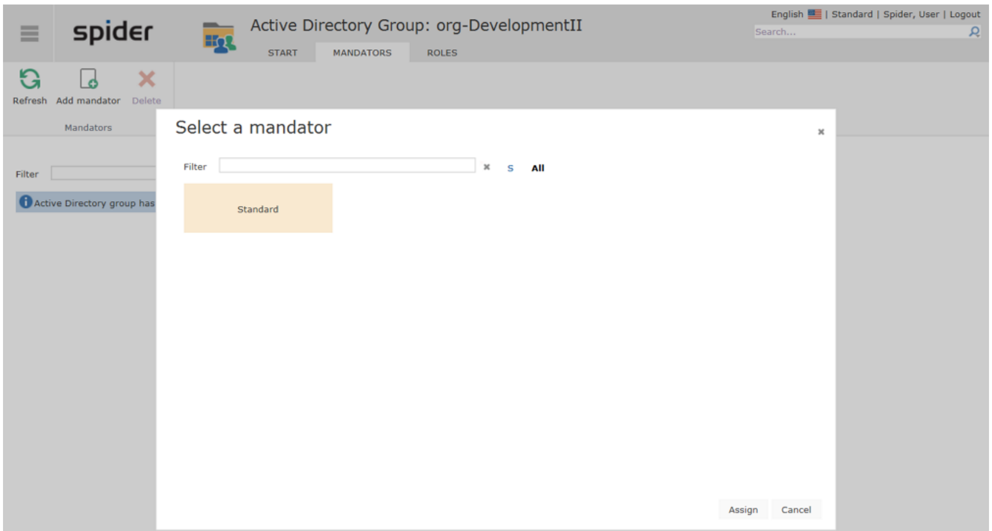
Note	If the desired AD group is not available, it must be assigned before.

➢ Click on the **Groups identifier** for which a mandator assignment is to be done.



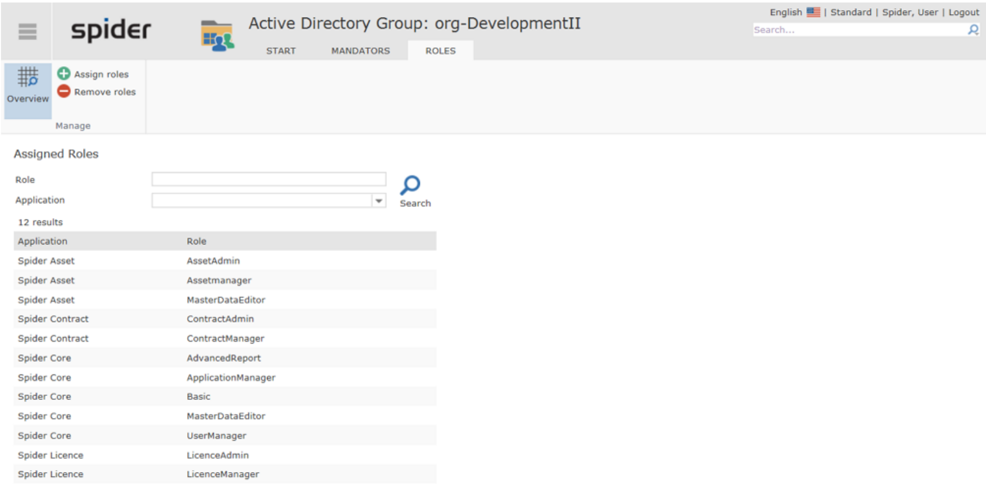
➢ Navigate to the **mandator** *ribbon.*

➢ Click on the **Add mandator** ribbon button.



➢ Select the mandator and accept the assignment by clicking on the **Assign** button.

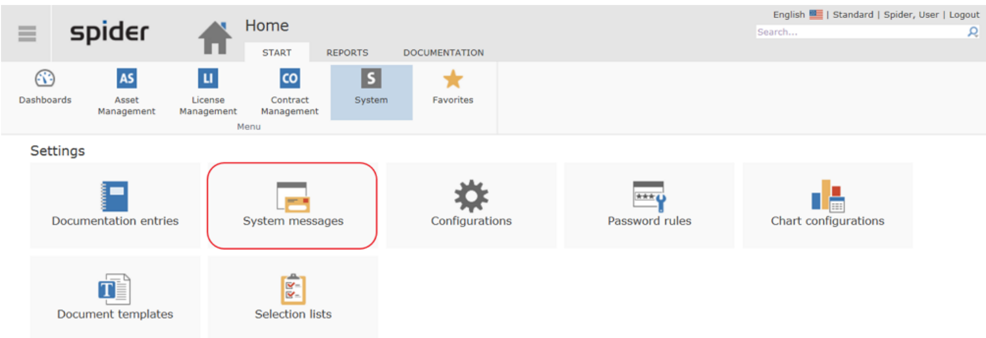
➢ Go to the **Roles** ribbon to assign the desired roles to the just assigned group.



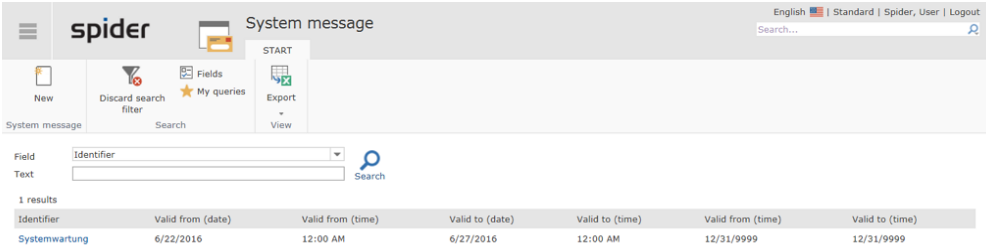
➢ To add more roles, click on the Ribbon button **Assign roles**.

8.7 System messages

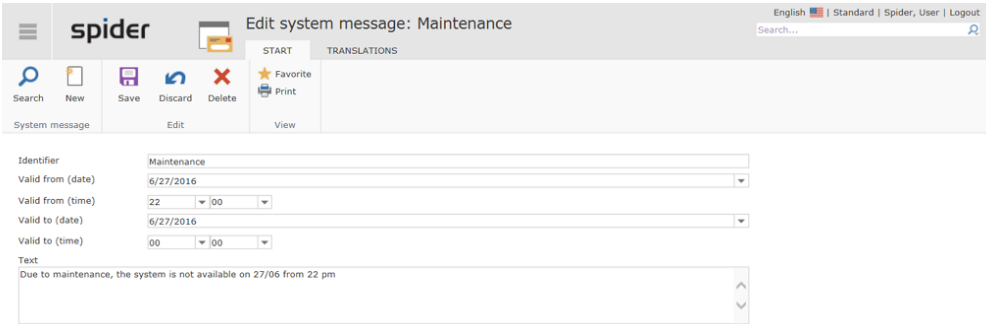
Use the System messages function to inform the users about scheduled events such as pending maintenance works.



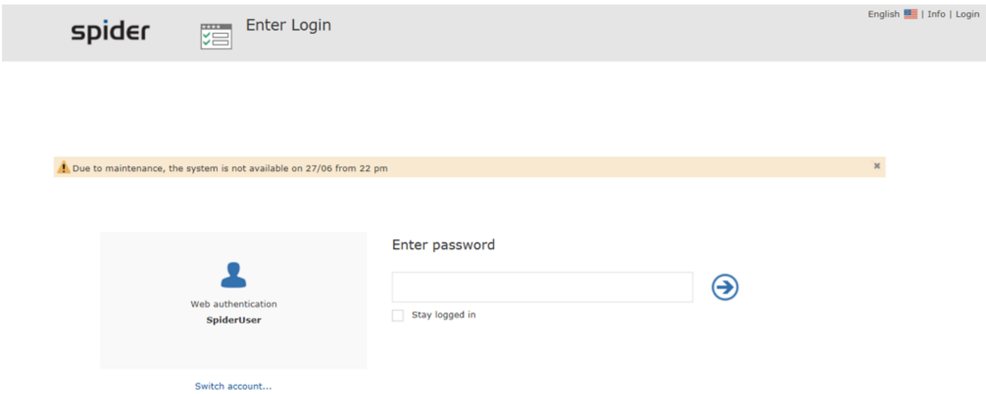
- On the home page of Spider System, go to the *Settings* menu area or click on the menu item **System messages** in the **Backstage** (on page 35).



- Click on the **New** ribbon button, to detect a new system message or click on the identification to edit an existing message.



- Complete the process by clicking on the **Save** ribbon button or on Discard.



Note	During the selected period, the system message is shown during each login.