

The new License Manager

Instructions

Target group: Portal users of the new License Manager
Aim: Display & explain functionality

ZEISS
IQS

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General Controls and search fields (1/3)



This section provides an overview of the general controls available in the License Update window. As a general rule, all contracts and machines assigned to you should be visible in this section. *Should you be missing any of the contracts, please refer to the 'Missing Contracts' section.*

1. To narrow down the list to specific contracts or machines, please use the **search box**. Please enter the serial number, dongle ID or contract number you are searching for in the search box.
2. Additionally, the list of machines can be sorted using the '**Group By**' function, which enables the grouping of all machines according to criteria such as 'City', 'Software Status' or 'Custom Groups' (*for further details on creating custom groups, please refer to the 'Custom Group' section*).

License Manager

Activate & Return License Update

The screenshot displays the License Manager interface. At the top, there are two tabs: 'Activate & Return' and 'License Update'. Below the tabs, there is a search bar with the placeholder text 'Search by Contract/Serial no./Dongle ID. or Note - separated by ";"' and a magnifying glass icon. To the right of the search bar is a 'Filter' dropdown menu. Below the search bar, there is a 'Group By' button with a hamburger menu icon. To the right of the 'Group By' button is a 'Manage Groups' link with a pencil icon. Below the 'Group By' button, there is a 'Request license update' button and a message box that says 'My contract is not displayed here'. At the bottom, there is a table header with the following columns: 'Machine Name', 'Identifier', 'CRM Serial Number', 'Contract Number', 'City', 'Note', and 'Software Status'. Each column has a dropdown arrow next to it.

General Controls and search fields (2/3)



This section provides an overview of the general controls available in the License Update window. As a general rule, all contracts and machines assigned to you should be visible in this section. *Should you be missing any of the contracts, please refer to the 'Missing Contracts' section.*

3. As an alternative, you can filter the list by country, software status or machine name, for example, using the 'Filter' function.
4. Should you simply wish to change the order in which items are displayed, you can always [click directly on any item](#) to sort it alphabetically or numerically in ascending or descending order.

License Manager

Activate & Return License Update

Search by Contract/Serial no./Dongle ID. or Note - separated by ";"

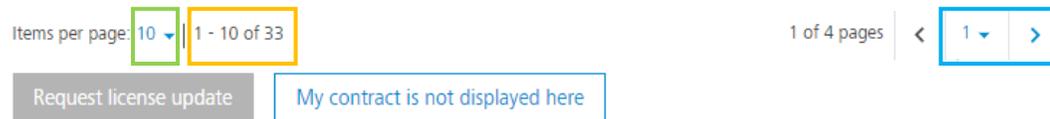
<input type="checkbox"/>	Machine Name	Identifier	CRM Serial Number	Contract Number	City	Note	Software Status
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General Controls and search fields (3/3)



This section provides an overview of the general controls available in the License Update window. As a general rule, all contracts and machines assigned to you should be visible in this section. *Should you be missing any of the contracts, please refer to the 'Missing Contracts' section.*

5. At the end of the page, you can select the **number of items to be displayed per page** (10, 20 or 50).
6. Furthermore, you can view the **number of items currently displayed out of the total number of items**.
7. You can either proceed to the **next page or select a specific page to view in the dropdown menu**.



Missing Contracts (1/2)



Should you notice any discrepancies in the mapping of your profile to the relevant contracts or machines, please be aware that this may have occurred due to an incorrect mapping. The updated License Manager offers a new function that simplifies the process for users to be added to the relevant contracts and machines.

1. Please click on 'My contract is not displayed here'.
2. You can now enter either one (or more) entitlement ID's of devices you are missing, or one (or more) contracts that you are missing.
3. Click on **Update**, to start the process. In the majority of cases, the mapping is completed automatically and should take approximately 30 minutes. Please allow sufficient time for the systems to update.

Items per page: 10 | 1 - 10 of 33

Request license update

My contract is not displayed here



Update SMA contract details

Please enter your EntitlementId or your Contract number that are missing in your overview.

Please enter Entitlement Id numbers separated by ","

Where & how to find the Entitlement Id? ⓘ

Please enter contract numbers separated by ","

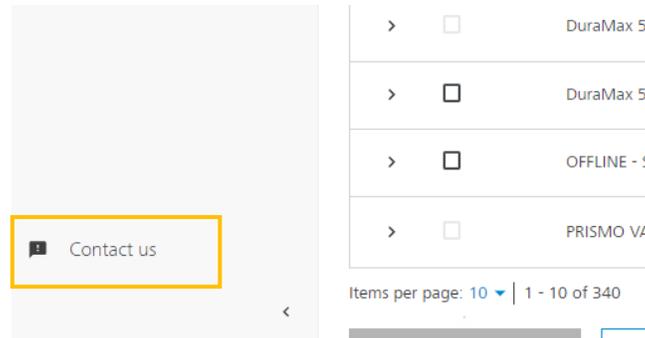
Once your request is verified, the contract will be added in your view.

Missing Contracts (2/2)



Should you notice any discrepancies in the mapping of your profile to the relevant contracts or machines, please be aware that this may have occurred due to an incorrect mapping. The updated License Manager offers a new function that simplifies the process for users to be added to the relevant contracts and machines.

3. In some cases, the contract cannot be mapped automatically. In this instance, you will see a message in the top right-hand corner of the screen stating, "Your request did not pass the validation step. Please contact us directly." Click on the link provided in the message and open a ticket to have your case resolved. Please provide information in the ticket regarding which machines or contracts you require access to. We will then take care of your request manually.
4. If other issues arise, as always, you are welcome to contact your ZEISS contact or open a ticket through the **Contact us** field at the bottom left of the page.



Update Machines (1/4)



This section provides guidance on the update process. It is possible to update one machine at a time or to select multiple machines for simultaneous updating.

1. In the overview, you can in the column “**Software Status**” at one glance which machine is able to receive an update.

Group By Manage Groups

Request license update My contract is not displayed here

<input type="checkbox"/>	Machine Name	Identifier	CRM Serial Number	Contract Number	City	Note	Software Status
> <input type="checkbox"/>	PRISMO VAST 09/15/07	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	— ↗	Update available
> <input type="checkbox"/>	OFFLINE - STATION	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	— ↗	Update available

Update Machines (2/4)

Update a specific machine



This section provides guidance on the update process. It is possible to update one machine at a time or to select multiple machines for simultaneous updating.

2. To update a specific machine, simply click on the relevant field to **expand** it. This provides further details, such as the **currently installed software version**, the **version to which it is going to be updated** and the **available options**.
3. To begin the update process for this particular machine, please click on **"Request license update"**. To confirm the update, click on the **"Update"** button in the information window. The email containing the license information would be sent to the individual who initiated the update process.

The screenshot shows a machine details page for 'PRISMO VAST 09/15/07'. The page includes fields for Machine Name, Identifier, and CRM Serial Number. Below these are license details: License Type (Dongle License), Entitlement ID, SMA Contract Owner, Contract Start (07/1/2016), and Contract End (12/31/2026). The software section is expanded, showing 'Software: ZEISS CALYPSO 7.4.2' with a link to 'Software Binaries: Download center'. Below this, an 'Update available' notification shows 'ZEISS CALYPSO 7.8'. At the bottom of the software section, there is a 'Request license update' button. Other fields include 'Last Update on', 'Updated by', 'Software Options' (SMA Fee CALYPSO CNC Base Dgl Lic), 'Quantity', and 'License Type' (Dongle License).



The 'Update Confirmation' dialog box displays the message: 'The systems with the following serial numbers can be updated'. It contains a table with the following data:

Serial Number	Software
[Redacted]	ZEISS CALYPSO 7.4.2 ● Update available - ZEISS CALYPSO 7.8

At the bottom of the dialog, there are two buttons: 'Cancel' and 'Update'.

Update Machines (3/4)

Update multiple machines



This section provides guidance on the update process. It is possible to update one machine at a time or to select multiple machines for simultaneous updating.

- To update multiple machines simultaneously, **select all the machines you wish to update**. Alternatively, you can select all available machines by checking **this checkbox**. *We recommend updating not more than 10 machines at once.*
- To begin the update process for the selected machines, please click on **"Request license update"** at the bottom of the result list. To confirm the update, click on the **"Update"** button in the information window. The email containing the entitlements information would be sent to the individual who initiated the update process.

<input type="checkbox"/>	Machine Name ▾	Identifier ⓘ	CRM Serial Number ⓘ
> <input checked="" type="checkbox"/>	PRISMO VAST 09/15/07	[REDACTED]	[REDACTED]
> <input checked="" type="checkbox"/>	OFFLINE - STATION	[REDACTED]	[REDACTED]

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Request license update

My contract is not displayed here



Update Confirmation

The systems with the following serial numbers can be updated

Serial Number	Software
[REDACTED]	ZEISS CALYPSO 7.6.4 ● Update available - ZEISS CALYPSO 7.8
[REDACTED]	ZEISS CALYPSO 7.6.4 ● Update available - ZEISS CALYPSO 7.8

Cancel

Update Machines (4/4)

Update not possible



This section provides guidance on the update process. It is possible to update one machine at a time or to select multiple machines for simultaneous updating.

4. Please note that in some cases, even though the software is not up to date, an **update is not possible** due to an expired SMA (Service Maintenance Agreement) contract. This will be **indicated by an "X" symbol on the results list and in the detailed view in the License Manager**.
5. To renew your SMA Contract, please contact your ZEISS contact person or click on **'Request Renewal'**. We will then contact you to renew your contract. Simply click on **'Request Renewal'** in the information window.

DuraMax 5/5/5 - VE

License Type: Dongle License

Entitlement ID: [Redacted]

SMA Contract Owner: [Redacted]

Contract Start: 01/1/2014

Contract End: 12/31/2021 ✘ Contract Expired Request Renewal

Software: ZEISS CALYPSO 7.2

Update available: ZEISS CALYPSO 7.8

Request license update



Request Renewal Confirmation

You are about to request renewal of the following SMA contract number:

[Redacted Contract Number]

Thank you for your interest! The ZEISS Team will contact you once the request has been reviewed.

Cancel Request Renewal

Troubleshooting (1/1)

Page loads endlessly



Should the license manager display the loading symbol for an extended period, we kindly request your patience. Please be aware that loading a significant number of machines may take up to two minutes. The license manager is equipped with an automatic timeout feature. In the event of an error, an error message will be displayed, preventing the user from becoming stuck on the loading animation. In the event that you encounter an error, we kindly request that you try the following steps:

1. Log off from the portal and close your browser.
2. Clear your browser cache or open the portal in an incognito tab.
3. Attempt the process again a couple of hours later, as there may be maintenance being carried out.
4. If the license manager still times out, or any other problems occur, please create a ticket by clicking on the "Contact us" button at the bottom left of the page. Alternatively, you can also always contact us through the other known channels.





Seeing beyond