Authorizations and possibilities of the new campus software distribution

With the changeover to the new software distribution system, we have also made some changes to the authorizations and general options in the campus software, which are largely based on feedback from the old system. In the following, we would like to provide an overview of the new structures and will explicitly point out changes to the old system.

1 Roles and their authorizations

The new system is based on organizational units, whereby each organizational unit stands alone. This means that higher organizational units (e.g. group area) have no influence on sub-organizational units. If this is desired, the roles of the sub-organizational units must be assigned accordingly.

The new system recognizes the following roles:

- Org leaders (sometimes referred to as managers in the matrix)
- Persons authorized to release commercial transactions
- Technically authorized persons
- Org user
- Persons responsible for licenses
- Position. Persons responsible for billing

1.1 Org leaders

The organization head is imported daily from tiss and can therefore not be set manually, but comes from the central administration system. If incorrect assignments are found here, this must be clarified with the tiss team. The head of the org has the right to set all other roles. It is important to note that the head of the organization must also assign the roles to him/herself, otherwise they will not be assigned; the head of the organization only receives the accounting information automatically.

If administration is carried out by the superordinate organization, the head of the org must authorize the relevant persons via the roles.

Furthermore, the head of the org has the option (and obligation) to enter a valid cost center for each portal category (e.g. campus software, hardware, ...). The cost center is automatically checked once a day. If no valid cost center is stored, the Org Manager will be informed by e-mail after the check.

1.2 Persons authorized to release commercial transactions

At least one person must be entered in this role. All persons in this role can decide whether an order or cancelation may be carried out. These persons are ultimately responsible for the decision made to ensure that the software is used correctly (e.g. that it is also uninstalled correctly after being canceled).

A new feature is that when placing an order, the customer selects a person authorized to issue commercial releases, who is automatically notified by e-mail. Furthermore, an order can be rejected in the new system. A rejection requires a written justification.

1.3 Technically authorized persons

This role is optional and has been introduced in the new system. For large departments/institutes, it can be advantageous if a technical necessity is clarified before the financial one. Therefore, technical decision-makers can optionally be added to this role. This decision is made before the commercial decision. If the person with technical approval authorization is also the person with commercial approval authorization, the approval applies to both steps at the same time.

1.4 Org user

Each Org unit automatically has an Org user. This is created automatically when the Org unit is created. This Org user is not a natural person, but offers the option of taking over licenses and hardware that cannot or should not be assigned to a natural person. This makes it possible to implement the long expressed wish to book licenses and devices to the org unit and not to attach them to an admin.

As Org users are not natural persons, no named licenses can be booked for the Org user.

Note: Until the 'Microsoft activation' is changed to a token-based solution, Org users cannot perform Microsoft activations as the current method is based on SSO authentication.

1.5   Persons responsible for licenses

The role of the person responsible for the license has been significantly expanded and thus up-graded as part of the new system. As before, persons responsible for licenses at SWD can see all products of the persons under their responsibility. This was introduced so that local administrators can carry out installations for other people without having to pass on passwords.

A new feature is the possibility for persons responsible for licenses to place orders and cancel orders on behalf of all persons under their responsibility. This means that the long expressed wish that the active cooperation of the persons concerned is no longer necessary, but that the person responsible for the license can carry out the entire ordering process on their behalf, has been implemented.

Persons responsible for licenses are therefore also a prerequisite for placing and managing orders for the Org user. Furthermore, persons responsible for licenses are required to be able to manage licenses of retired persons; the orphaned license status no longer exists in the new system.

1.6   Deputy persons responsible for billing

As before, people in this role receive the quarterly statements in addition to the head of the organization.

2   Product features

Every software product has a number of properties. Most of them provide information about what is required in operation (e.g. needs access to TUnet). However, some properties are also important for the ordering options. These include, among others:

- Named license:
   The order is only possible for natural persons (e.g. no org users)
- Maximum number per person:
   Some products have a limit on how many orders can be placed per product and person. This is the case, for example, with online account-based products.
- Some software cannot be provided automatically via the Empirum client or used via VDI. There may therefore be restrictions on the delivery options.
- Some software is not offered via the usual distribution channels, but must be obtained from external partners on your own responsibility.

3   Order process

- Each authorized person can send orders for themselves; persons responsible for licenses can also send orders on behalf of the persons they represent.
- For persons with multiple organizational affiliations, the correct organizational unit must be selected. This cannot be changed later (unlike the old system).
- Based on the selected organizational unit, an authorized person can be selected (if there is more than one).
- The output variant must then be selected. The file server variant (SWD) is always available for selection, a specific client only if TUclients are registered on the user. TUworkplace will be offered at a later date.
  If a client can be selected, the installation will start automatically a few minutes after release (if the client is available in the network).
  If it is indicated when ordering a client that an installation package is not yet available, the output can be delayed.
- Once the order has been placed, it goes through the approval process. The order is only ready for installation after commercial approval. The process can be traced in the purchase orders.

4   Changes

Each authorized person can make changes for themselves, persons responsible for licenses can also make changes on behalf of the persons they represent. Changes in the new system are **always** carried **out in self-service**; TU.it only needs to be involved via a ticket in special cases or in the event of an error.

All changes are made by canceling and reordering, as the variety of options (persons, org units, delivery types, end devices, ...) is too large to provide a simple 'rebooking system'. In order to avoid having to pay twice for a quarter in the event of such a change, a person's cancelations and new bookings are offset within a quarter so that this quarter is only charged once. Moving licenses between two people is no longer supported and counts as a separate cancellation and new order.

5   Billing details

A software product is invoiced in full in the quarter in which it is ordered (date of release) and must be paid for on a quarterly basis until the end of the quarter in which it is canceled (date of release) by means of internal cost allocation. If a product is canceled within a quarter (date of release), the product can still be used until the end of the quarter.

Graduated discounts - as in the old system - no longer exist.

6   Necessary interventions in the event of termination of employment or changes in membership of the organization

All orders are valid indefinitely. All licenses must therefore be actively canceled without exception. This can be done by the person concerned or by a person responsible for licenses in the paying organizational unit. Unused licenses will continue to be billed unchanged. It is the responsibility of the person responsible for the license to cancel in good time.