



# What's New in 5.9

**Guide to new features in Spider Impact 5.9**  
**Updated October 28<sup>th</sup>, 2026**

# Table of Contents

|             |                                                                           |           |
|-------------|---------------------------------------------------------------------------|-----------|
| <b>I.</b>   | <b>Your success is important to us!.....</b>                              | <b>5</b>  |
| <b>II.</b>  | <b>AI &amp; Automated Insights .....</b>                                  | <b>7</b>  |
|             | Scorecard Insights .....                                                  | 7         |
|             | Generating and refreshing insights .....                                  | 8         |
|             | Executive Summary .....                                                   | 9         |
|             | Performance in Key Strategic Areas .....                                  | 10        |
|             | Key Findings .....                                                        | 11        |
|             | Corrective Actions .....                                                  | 12        |
|             | Recommendations .....                                                     | 14        |
|             | Connect ChatGPT, Claude, and Microsoft 365 Copilot to Spider Impact ..... | 15        |
|             | Getting connected .....                                                   | 16        |
|             | Letting AI tools make changes.....                                        | 17        |
|             | Seeing and ending connections.....                                        | 17        |
|             | Turning it on .....                                                       | 17        |
|             | Choosing which datasets Impact Assistant can use .....                    | 18        |
|             | Impact Assistant in a floating panel .....                                | 19        |
|             | Faster Impact Assistant responses.....                                    | 20        |
| <b>III.</b> | <b>Scorecards &amp; Initiatives .....</b>                                 | <b>21</b> |
|             | Approve KPI values through up to four levels .....                        | 21        |
|             | Seeing where a value stands .....                                         | 22        |
|             | Earlier approvers hear about rejections .....                             | 24        |
|             | Assigning owners by level in bulk.....                                    | 24        |
|             | Owners show which level they belong to.....                               | 25        |
|             | Importing KPI equations .....                                             | 26        |
|             | The note and value cut-off dates now agree .....                          | 27        |
|             | Single Goal Number scoring type.....                                      | 27        |
|             | Minimum and maximum scores for each scoring type.....                     | 31        |
|             | Putting them together: scoring as a percent of the goal .....             | 33        |
|             | Arabic scorecard import templates are readable .....                      | 35        |
|             | New tasks land under the initiative you just created .....                | 35        |
| <b>IV.</b>  | <b>Forms.....</b>                                                         | <b>35</b> |
|             | Required fields are marked with a star .....                              | 36        |
|             | Pre-fill form variables from a link .....                                 | 36        |

|                                                                          |           |
|--------------------------------------------------------------------------|-----------|
| New data options for actions and conditions .....                        | 37        |
| Files .....                                                              | 38        |
| Calculated fields.....                                                   | 38        |
| Combining values from linked records .....                               | 39        |
| Suggestion Filters on Single Field widgets .....                         | 39        |
| Showing part of a list of linked records.....                            | 40        |
| Linking records through a connecting dataset .....                       | 40        |
| Record lists remember your search and sort.....                          | 41        |
| Record lists show up to 1,000 records.....                               | 41        |
| Record lists can show fields from linked records.....                    | 41        |
| Record list filters can use the form's variables.....                    | 42        |
| Left-aligned buttons come first in button settings.....                  | 42        |
| Date pickers go back to 1925 .....                                       | 43        |
| Performance improvements for forms.....                                  | 43        |
| View-only users can use navigation buttons .....                         | 44        |
| The cursor starts in the first field .....                               | 44        |
| Recording actions when you're logged in as someone<br>else .....         | 45        |
| <b>V. Dashboards &amp; Charts.....</b>                                   | <b>45</b> |
| More of the map responds when you hover or click.....                    | 45        |
| Saudi Arabia and the UAE drill down to their cities .....                | 46        |
| Canadian postal codes .....                                              | 48        |
| Maps recognize places the way your data names<br>them.....               | 50        |
| Text widget links can open in the same window .....                      | 51        |
| Drilldowns from a shared dashboard keep their field<br>and filters ..... | 51        |
| Shape widgets can count scorecard items.....                             | 51        |
| <b>VI. Datasets.....</b>                                                 | <b>53</b> |
| Filter values can come from linked datasets.....                         | 53        |
| Export large datasets to CSV.....                                        | 53        |
| Imports no longer collide with records you added by<br>hand .....        | 54        |
| Empty sums and averages show blank instead of<br>zero .....              | 55        |
| File fields can be used in equations .....                               | 55        |
| A clearer message while a rollup tree rebuilds.....                      | 55        |
| Rollup fields can be changed to linked fields .....                      | 56        |

|                                                                   |           |
|-------------------------------------------------------------------|-----------|
| <b>VII. Reports .....</b>                                         | <b>56</b> |
| Report headers stay put when you scroll .....                     | 56        |
| <b>VIII. Home, Files, Alerts &amp; Search .....</b>               | <b>57</b> |
| Search forgives typos and understands phrases .....               | 57        |
| The newest file revision is at the top.....                       | 58        |
| URLs in broadcast alerts become links.....                        | 59        |
| <b>IX. Apps .....</b>                                             | <b>59</b> |
| Drilldowns stay inside the App .....                              | 59        |
| Exporting from inside an App .....                                | 60        |
| <b>X. Import &amp; Export .....</b>                               | <b>61</b> |
| Organization template export and import.....                      | 61        |
| Importing spreadsheets from Microsoft 365 .....                   | 63        |
| Pagination in REST imports .....                                  | 67        |
| Rolling date ranges in REST imports.....                          | 68        |
| More date formats are understood on import .....                  | 69        |
| An API for nearly the whole application .....                     | 69        |
| For people .....                                                  | 70        |
| For machines.....                                                 | 73        |
| Spreadsheet imports survive rearranged sheets .....               | 73        |
| CSV exports of rollup fields can be re-imported .....             | 73        |
| Scheduled imports run at most every 30 minutes .....              | 73        |
| <b>XI. Security .....</b>                                         | <b>74</b> |
| One permission can cover thousands of record owners.....          | 74        |
| Report totals respect every View Records filter .....             | 75        |
| View Only users can keep bookmarks .....                          | 75        |
| A great deal more is audited.....                                 | 76        |
| KPI approvals and rejections .....                                | 76        |
| Where a KPI value came from.....                                  | 77        |
| What a note used to say .....                                     | 77        |
| Groups and permissions .....                                      | 78        |
| Dataset rollup trees .....                                        | 78        |
| Application configuration, scoring types, and outbound email..... | 79        |
| The User Permissions Audit no longer freezes the browser .....    | 79        |
| <b>XII. Admin.....</b>                                            | <b>79</b> |

|                                                              |           |
|--------------------------------------------------------------|-----------|
| Finding and quarantining stale organizations .....           | 79        |
| The version number is easier to find.....                    | 80        |
| <b>XIII. Under the hood .....</b>                            | <b>80</b> |
| A much more accessible application .....                     | 80        |
| Emoji import correctly .....                                 | 81        |
| Duplicate record IDs are impossible, not just unlikely ..... | 81        |
| Easier form troubleshooting .....                            | 81        |
| Quieter, more useful logs .....                              | 81        |

## Your success is important to us!

Spider Impact 5.9 puts an analyst inside your scorecards. Open the new "Insights" tab and Impact Intelligence reviews everything beneath it — scores, goals, trends, forecasts, and the initiatives behind each item — then writes a plain-language strategy audit: where you stand, which areas need attention, what patterns nobody has noticed, which red KPIs have no initiative behind them, and what to do next. Every number comes from Spider Impact's own calculations, not the AI, and every item it mentions is a link.

ChatGPT, Claude, and Microsoft 365 Copilot already connect to tools like Google Drive, Gmail, and Slack, and now they connect to Spider Impact too. Ask them about your scorecards, initiatives, and datasets in plain language, with answers drawn live from Spider Impact and limited to what each person is allowed to see. With an administrator's permission, they can even enter KPI values, add notes, and record initiative progress for you.

Approvals can now follow your real sign-off chain. A KPI value update can pass through up to four levels of owner approval, each with its own owners. Everyone can see how far a value has progressed, and earlier approvers are told if someone further up rejects it.

Getting data in and out reaches further. Import spreadsheets on a schedule straight from SharePoint, OneDrive, and Teams, including Microsoft's government clouds. REST imports now follow paginated APIs past the first page and can request rolling date ranges on their own. You can export an entire organization — scorecards, initiatives, dashboards, reports, datasets, Forms, and Apps — to a single file and rebuild it in another Spider Impact installation. And the API now covers nearly the whole application, with documentation built for both people and AI tools.

Beyond these, 5.9 sharpens much of what you use every day. Forms mark required fields, offer only the choices that fit each person, remember your place in a record list, and reach data they couldn't before. Maps work in more of the world and understand more of the ways people write place names. Search

forgives typos. Reports keep their headers on screen. Audit history captures far more. And Spider Impact's accessibility score rose from 64 to 95.

To help you get the most from Spider Impact, we offer free training videos on our website and functionality guides like this one, as well as paid training courses and consulting engagements. Learn more about all of our services at <https://www.spiderstrategies.com/services/>

# AI & Automated Insights

Impact Intelligence grows in two directions. Scorecards gain an analyst of their own that reads a whole strategy and writes up what it finds, and Impact Assistant gets a new home on screen. Both now run on the latest frontier AI models. And Spider Impact now connects directly to ChatGPT, Claude, and Microsoft 365 Copilot.

## Scorecard Insights

Scorecards have a new "Insights" tab next to "Overview" and "KPIs". Open it and Impact Intelligence reviews the whole scorecard (every KPI, goal, trend, forecast, and attached initiative) and writes a strategy audit in plain language. The audit appears immediately as it's written, section by section, so you don't wait for the finished document.

The screenshot displays the 'Mobileworld Balanced Scorecard' interface. On the left is a dark sidebar with a navigation menu. The main content area is titled 'Mobileworld Balanced Scorecard' and has three tabs: 'Overview', 'Measures', and 'Insights' (which is selected). Below the tabs, there's a 'Last Updated: A Few Seconds Ago' status and a 'Regenerate' button. A light blue box contains an AI-generated analysis. Below that is an 'Executive Summary' section with a gauge chart showing a score of 2.6 out of 10.0, with a red indicator for a -1.5 point change. The 'Measures' section lists various metrics with color-coded status indicators. The 'Performance in Key Strategic Areas' section provides a detailed analysis of the scorecard's performance across different perspectives.

**Mobileworld Inc. Example**

**Mobileworld Balanced Scorecard**

Overview Measures **Insights** Edit

Last Updated: A Few Seconds Ago [Regenerate](#)

This analysis was written by AI, and it's built on more than your raw numbers. Behind every scorecard item, Spider Impact is already doing the math. It forecasts where each item is headed, measures how reliable each trend is, and tests whether your initiatives are actually moving the items they're meant to fix. AI takes all of that data and tells the story behind it, showing where performance stands, what deserves your attention, and what you can do about it. Treat it as a well-informed first read, not the final word. Weigh its recommendations against what you know before acting on them.

### Executive Summary

The Mobileworld Balanced Scorecard is red, scoring 2.56 out of 10.0. It has fallen 1.71 points over the measurement window and is declining by about 0.08 per month with some variability. The forecast calls for 3.2 next month, but the range runs from 1.59 to 4.8, roughly 100% of the predicted value. That range is wide because a steadily improving Financial Perspective is pulling against a sharply declining Customer Perspective, and several Measures swing erratically between periods.

Profitability is holding up, but the customer base and sales engine that should sustain it are eroding. Churn, search visibility, telesales activity, and contract turnaround are all moving the wrong way with high confidence. Unless that changes, today's financial strength will be hard to keep.

### Measures

2 Green Measures 4 Yellow Measures 11 Red Measures 1 Measure needs updating 10 Downward trending Measures 6 Upward trending Measures

### Performance in Key Strategic Areas

Three Perspectives explain most of the overall picture. Customer and Organizational Capacity are dragging the scorecard down. Financial is the one area moving in the right direction, though its strength rests mostly on profit rather than revenue.

The tab is available on every item in the scorecard, and the audit always covers the whole scorecard, not just the branch you're on. Every audit is laid out the same way:

- **Executive Summary** — where the scorecard stands, and what that means
- **Performance in Key Strategic Areas** — the areas worth your attention, and the KPIs driving them
- **Key Findings** — cross-cutting observations that are easy to miss when you track KPIs one at a time
- **Corrective Actions** — red KPIs with no initiative behind them, and initiatives that aren't working
- **Recommendations** — specific things to do next

Every number in the report comes from Spider Impact's own calculations, not from the AI. Spider Impact computes the scores, values, trends, forecasts, and table rows; the AI decides what's worth pointing out and writes about it. Every scorecard item the report names is a link straight to that item.

A banner at the top of the tab says plainly that the analysis was written by AI. And because Insights uses the same AI service as Impact Assistant, the "Insights" tab appears only when "Enable Impact Assistant" is turned on in Application Administration.

### ***Generating and refreshing insights***

The first time anyone opens the "Insights" tab, the audit is generated and saved. After that, everyone sees the saved copy instantly, with a "Last updated:" timestamp showing its age. When you want a fresh analysis after a period's values come in or after modifying your scorecard, click "Regenerate".

# Mobileworld Balanced Scorecard



Overview

Measures

Insights

Edit

Last Updated: A Few Seconds Ago

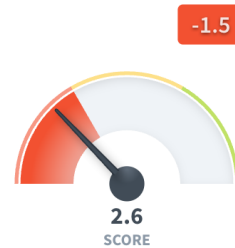
Regenerate

This analysis was written by AI, and it's built on more than your raw numbers. Behind every scorecard item, Spider Impact is already doing the math. It forecasts where each item is headed, measures how reliable each trend is, and tests whether your initiatives are actually moving the items they're meant to fix. AI takes all of that data and tells the story behind it, showing where performance stands, what deserves your attention, and what you can do about it. Treat it as a well-informed first read, not the final word. Weigh its recommendations against what you know before acting on them.

## Executive Summary

The Mobileworld Balanced Scorecard is red, scoring 2.56 out of 10.0. It has fallen 1.71 points over the measurement window and is declining by about 0.08 per month with some variability. The forecast calls for 3.2 next month, but the range runs from 1.59 to 4.8, roughly 100% of the predicted value. That range is wide because a steadily improving Financial Perspective is pulling against a sharply declining Customer Perspective, and several Measures swing erratically between periods.

Profitability is holding up, but the customer base and sales engine that should sustain it are eroding. Churn, search visibility, telesales activity, and contract turnaround are all moving the wrong way with high confidence. Unless that changes, today's financial strength will be hard to keep.



## Measures

2 Green Measures

4 Yellow Measures

11 Red Measures

1 Measure needs updating

10 Downward trending Measures

6 Upward trending Measures

## Executive Summary

The report opens with two short paragraphs: what has happened to performance, and what it means. Beside them is the familiar speedometer from the "Overview" tab, showing the current score.

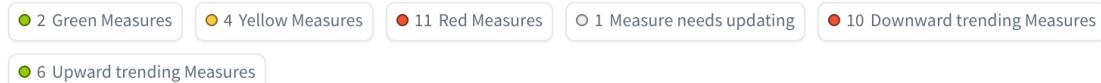
## Executive Summary

The Mobileworld Balanced Scorecard is red, scoring 2.56 out of 10.0. It has fallen 1.71 points over the measurement window and is declining by about 0.08 per month with some variability. The forecast calls for 3.2 next month, but the range runs from 1.59 to 4.8, roughly 100% of the predicted value. That range is wide because a steadily improving Financial Perspective is pulling against a sharply declining Customer Perspective, and several Measures swing erratically between periods.

Profitability is holding up, but the customer base and sales engine that should sustain it are eroding. Churn, search visibility, telesales activity, and contract turnaround are all moving the wrong way with high confidence. Unless that changes, today's financial strength will be hard to keep.



### Measures



Below the summary, a row of tags counts every KPI in the scorecard, including KPIs linked in from other scorecards: one for each color your KPIs score, one each for upward and downward trends, and one for KPIs that need updating. Click any tag to open a report listing exactly those KPIs. A color tag's report and the "KPIs need updating" report keep their filters, so you can save them and they stay current as your KPIs change.

## *Performance in Key Strategic Areas*

This section highlights the areas that most deserve attention — usually two, but sometimes up to four. On a scorecard with perspectives or key performance areas, those are the natural candidates; otherwise the analysis finds themes in the data, which can cut across branches of the tree.

Each area gets a short label explaining why it was chosen, a paragraph on how it's performing, and three figures: its current score, its trend (how much it's moving each period), and its projected value for the next period. A table below lists the KPIs driving it, with each one's score, goal, previous and current values, and projection. If nothing stands out, as on a small scorecard or one without much history, the section is left out.

#### PRIMARY AREA OF WEAKNESS

### Customer

This is the steepest and most reliable decline on the scorecard. Retention and online visibility are both deteriorating, and satisfaction results swing too widely to offer any comfort.

1.5 Trend ↓ 0.3 Projected 1.1

| HIGHLIGHTED MEASURES           | SCORE | GOAL | PREVIOUS              | CURRENT               | PROJECTED |
|--------------------------------|-------|------|-----------------------|-----------------------|-----------|
| 🔴 Customer Churn               | 0     | 1%   | 12.5%<br>Aug 31, 2026 | 15.7%<br>Sep 30, 2026 | 12.8%     |
| 🔴 Google Search Position       | 0     | 2    | 26<br>Aug 31, 2026    | 49<br>Sep 30, 2026    | 14.5      |
| 🟡 Customer Satisfaction Survey | 4.4   | 95%  | 16.7%<br>Aug 31, 2026 | 91.7%<br>Sep 30, 2026 | 54.8%     |

## Key Findings

Key findings are the insights that only appear when you look at everything at once: two areas that should move together but don't, an initiative that ran for a year and changed nothing, or unreliable data undermining every forecast.

Each finding is a card with:

- a severity badge, such as "CRITICAL"
- a title
- a short description of what the data shows
- a table of the key numbers behind it
- a note on why it matters

Cards are colored red, yellow, green, or neutral, so you can tell warnings from good news at a glance.

## Key Findings

These findings weigh trends with high reliability most heavily. Several Measures show abrupt jumps between 0% and 100% from one month to the next, so conclusions about those specific items are tentative.

### CUSTOMER EROSION IS STEADY AND PREDICTABLE

CRITICAL

The Customer Perspective has lost 4.43 points and is declining by 0.31 per month with high reliability. That is the most confident downward trend on the scorecard. Churn and search ranking both worsened again last month, and both sit far from goal.

Customer-facing activity is shrinking at the same time. Telesales volume is falling steadily, which leaves fewer touchpoints to win back or replace lost customers.

|                           |                  |
|---------------------------|------------------|
| Customer                  | 1.5              |
| Customer Churn            | 15.7% vs 1% goal |
| Google Search Position    | 49 vs 2 goal     |
| Telesales Calls Completed | 159              |

Because this decline is consistent rather than erratic, it is likely to continue without intervention. Losing customers while becoming harder to find online is a compounding problem that will eventually show up in revenue.

### PROFIT IS UP WHILE THE REVENUE BASE WEAKENS

TRADE-OFF

The Financial Perspective is improving, and Net Operating Profit is beating its goal. Underneath that, Device Sales and Subscription Revenue both miss target, and Service Revenue has lost \$8,880 over the window.

That leaves a gap of more than four points between Financial (5.24) and Customer (1.48). Margin is being protected while the customer and revenue base thins.

|                                   |                         |
|-----------------------------------|-------------------------|
| Financial                         | 5.2                     |
| Net Operating Profit (before tax) | \$78.6K vs \$75.4K goal |
| Subscription Revenue              | \$249K vs \$260K goal   |
| Device Sales Revenue              | \$441K vs \$465K goal   |

Profit can't keep outpacing revenue for long. Unless the customer decline is reversed, the Financial Perspective's improving trend is likely to stall.

### CLOUD MIGRATION LINKED TO A PROFIT TURNAROUND

BRIGHT SPOT

### SEVERAL MEASURES LOOK UNRELIABLE

DATA CONCERN

## Corrective Actions

Corrective Actions connects your scorecard to your initiatives. Unlike the rest of the report, it isn't written by the AI — both tables are built directly from your data.

"Red KPIs without Initiatives" lists every red KPI with no initiative behind it, along with its score, current value, goal, and period. Each one is a gap in your plan.

"Ineffective Initiatives" lists initiatives that don't seem to be helping the items they're attached to, rating each one's impact as "Negative", "Mixed", or "No Impact". These are the initiatives to fix or retire so their resources can go elsewhere. Several ineffective initiatives on the same item are grouped under it.

Each table lists its worst items first and shows up to ten, with a banner giving the full count when there are more. A table with nothing to show is left out, and if neither has anything, so is the whole section.

## Corrective Actions

Many red Measures have no Initiative behind them. They span customer retention, sales activity, contract speed, and revenue, which leaves most of the scorecard's problem areas without a formal plan. No existing Initiatives are flagged as ineffective, but with just one Initiative in place, the bigger issue is coverage rather than performance.

### Red Measures without Initiatives

When a Measure turns red, you can put an initiative in place to fix the problem. These are all of the Measures that are performing poorly but have no initiatives.

There are 11 red Measures without initiatives. These are the first 10.

| MEASURE                                                                                                                              | SCORE | CURRENT | GOAL   | PERIOD         |
|--------------------------------------------------------------------------------------------------------------------------------------|-------|---------|--------|----------------|
|  <a href="#">% Net Operating Profit</a>           | 0     | 0%      | 10%    | September 2026 |
|  <a href="#">Average time to contract in days</a> | 0     | 39      | 5      | September 2026 |
|  <a href="#">Campaign e-Mails Sent</a>            | 0     | 3,194   | 3,500  | September 2026 |
|  <a href="#">Contract management risk index</a>   | 0     | 0%      | 50%    | September 2026 |
|  <a href="#">Customer Churn</a>                   | 0     | 15.7%   | 1%     | September 2026 |
|  <a href="#">Employee satisfaction survey</a>     | 0     | 0%      | 85%    | September 2026 |
|  <a href="#">Google Search Position</a>           | 0     | 49      | 2      | September 2026 |
|  <a href="#">IT effectiveness index</a>           | 0     | 0%      | 98%    | September 2026 |
|  <a href="#">Subscription Revenue</a>             | 0     | \$249K  | \$260K | September 2026 |
|  <a href="#">Telesales Calls Completed</a>        | 0     | 179     | 400    | September 2026 |

## Recommendations

The report ends with three to five concrete next steps. Each is a card with a bold instruction and a short explanation backed by real numbers from your scorecard, and every item it mentions is a link.

### Recommendations

These recommendations put the confidently declining customer and sales Measures first, then address the data and governance issues that cloud the rest of the picture.

#### Launch a customer retention Initiative focused on churn.

[Customer Churn](#) is at 15.7% against a 1% goal, up from 12.5% last month and rising with moderate reliability. It has no Initiative attached. Assign an owner to analyze where and why customers are leaving, and stand up a formal retention program this quarter.

#### Recover search visibility before it compounds the churn problem.

[Google Search Position](#) has slid to 49 against a goal of 2, worsening by about 2.7 positions per month with high reliability. Commission an SEO review and set a monthly ranking target, so new customer acquisition doesn't erode alongside retention.

#### Rebuild sales throughput and contract speed together.

[Telesales Calls Completed](#) is at 179 against a 400 goal and falling by about 9 per month with high reliability. [Average time to contract in days](#) has stretched to 39 against a 5-day goal, rising by about 1.7 days per month.

Treat these as one pipeline problem. Review telesales staffing and capacity, and map the contracting process to find where deals stall.

#### Audit the Measures with suspicious swings.

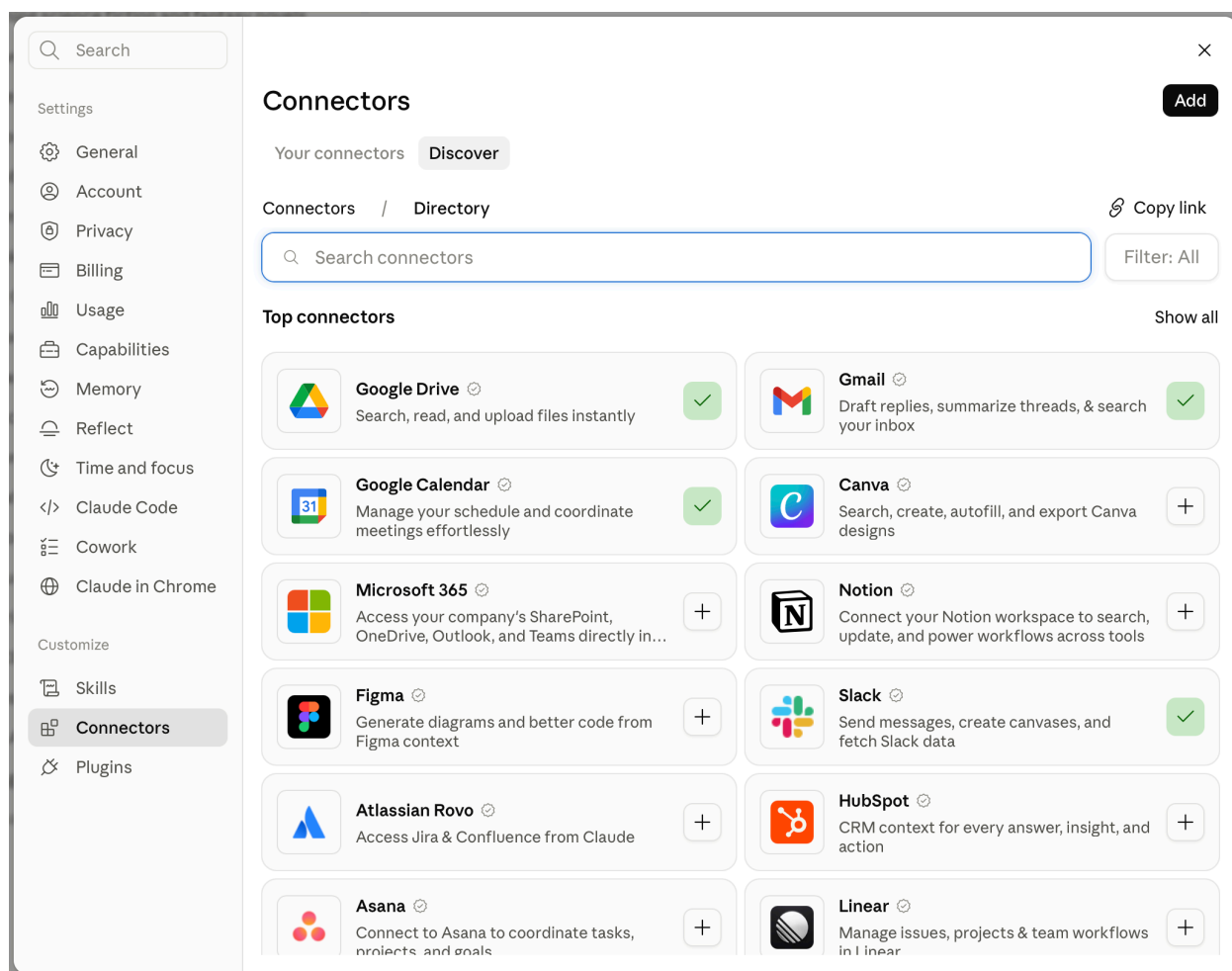
Verify the data behind [Employee satisfaction survey](#), [IT effectiveness index](#), [% Net Operating Profit](#), [Sales & General Admin](#), and [Customer Satisfaction Survey](#). Confirm whether the latest values are real before acting on the Organizational Capacity score or crediting the Financial Perspective's gains.

#### Close out or re-baseline the cloud migration.

The Migrate Servers to Cloud Initiative appears to be helping [Net Operating Profit](#), which sits at \$78,643 against a \$75,364 goal. However, it is nearly two years past its December 2024 due date. Decide whether to formally complete it or set a new due date with defined remaining scope, so its benefit is sustained and the work doesn't drift.

# Connect ChatGPT, Claude, and Microsoft 365 Copilot to Spider Impact

ChatGPT, Claude, and Microsoft 365 Copilot can already connect to much of the software people use at work, such as Google Drive, Gmail, Slack, and Microsoft 365, and use what's there to answer questions and get work done. In Claude, for example, they're listed under Connectors.

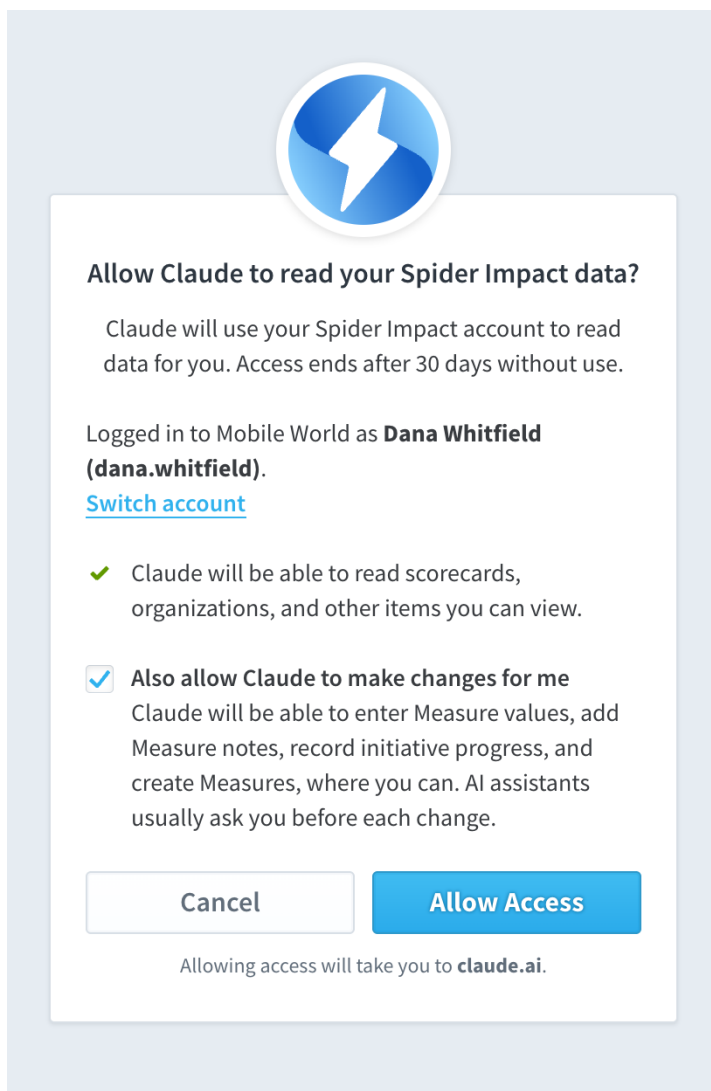


Now Spider Impact is one of those connections. Connect Spider Impact to any of these AI tools, or to another one that supports MCP, the standard these tools use to connect to other software. Then ask about your strategy in your own words: how a scorecard is doing, which initiatives are falling behind, what a dataset shows, or what's in the next briefing. The answers come straight from Spider Impact as you ask, so they're always current.

Each person connects with their own Spider Impact account, and the AI tool sees exactly what that person can see in Spider Impact and nothing more, because every request goes through the same permission checks as the browser. There's no shared login to manage and nothing to export.

### *Getting connected*

The "API Access" page under "Administration" shows your installation's MCP server URL. Add Spider Impact in ChatGPT, Claude, or Copilot using that URL, and you're sent to Spider Impact to log in as usual. A consent page then says exactly what the AI tool will be able to do, and nothing is shared until you click "Allow Access".



## Letting AI tools make changes

Connections start out read-only. If an administrator allows it, people can also let ChatGPT, Claude, or Copilot make changes for them by checking "Also allow Claude to make changes for me" (with the tool's own name) when they connect. It can then enter KPI values, add KPI notes, record initiative progress, and create KPIs, but only where that person could make the same change in Spider Impact. These tools usually ask before each change, every change is recorded under the person's name, and a KPI value entered this way shows "AI Connection" as its source.

## Seeing and ending connections

The "API Tokens" page is now called "API Access". Alongside your API tokens, it lists every AI tool you've connected, with when each one connected and when it was last used. Click a connection's delete icon to disconnect it, and it loses access immediately; you can reconnect at any time. Application administrators see everyone's connections and can disconnect any of them.

API tokens and MCP connections let other applications access Spider Impact on your behalf, with your permissions. Learn more in the [interactive API documentation](#).

To use your Spider Impact data in AI assistants like ChatGPT, Claude, or Microsoft 365 Copilot, add Spider Impact in the assistant using the MCP server URL <http://localhost:8100/impact/api/v1/mcp> and then log in to Spider Impact to approve access. The assistant gets read-only access to the items you can view.

| MCP CONNECTIONS FROM CHATGPT, CLAUDE, ETC. |                |              |              |         |
|--------------------------------------------|----------------|--------------|--------------|---------|
| ASSISTANT                                  | USER           | CONNECTED    | LAST USED    | ACTIONS |
| Claude Code                                | Full User      | Oct 27, 2026 | Oct 27, 2026 |         |
| Microsoft 365 Copilot                      | Full User      | Oct 27, 2026 | Oct 27, 2026 |         |
| Claude                                     | Marsha Mello   | Oct 27, 2026 | Oct 27, 2026 |         |
| Claude                                     | Dana Whitfield | Oct 27, 2026 | Oct 27, 2026 |         |
| ChatGPT                                    | Priya Shah     | Oct 27, 2026 | Oct 27, 2026 |         |

API TOKENS

Create API Token

| NAME                        | CREATED BY                  | CREATED      | ACTIONS |
|-----------------------------|-----------------------------|--------------|---------|
| Nightly data warehouse sync | Spider Impact Administrator | Oct 27, 2026 |         |
| Power BI refresh            | Spider Impact Administrator | Oct 27, 2026 |         |

## Turning it on

MCP connections are off until an administrator turns them on. In Application Administration, the "Impact Assistant" panel is now called "AI", with a new

"Allow MCP Connections From ChatGPT, Claude, Etc." setting. While that's on, a second setting, "Allow AI Connections To Make Changes", decides whether people may let those tools make changes. Turning either one off takes effect immediately, even for tools that are already connected.

The screenshot shows a settings panel with two sections. The first section is titled "Allow MCP Connections From ChatGPT, Claude, Etc." and has a dropdown menu set to "Yes". Below this is a light blue informational box stating: "This lets people use their Spider Impact data in AI assistants like ChatGPT, Claude, and Microsoft 365 Copilot. Each person logs in with their own Spider Impact account, and the assistant can read the items that person can view. The [API Access](#) page has the MCP server URL people need and lists every connection." The second section is titled "Allow AI Connections To Make Changes" and also has a dropdown menu set to "Yes". Below this is another light blue informational box stating: "People can also choose to let their AI assistant make changes for them when they connect it: entering Measure values, adding Measure notes, recording initiative progress, and creating Measures, only where that person could make the change in Spider Impact. AI assistants usually ask before each change, and every change is recorded under that person's name."

## Choosing which datasets Impact Assistant can use

Impact Assistant answers questions from your datasets, and until now it considered every dataset a user could see. If you keep test copies, training data, or near-duplicates alongside the real thing, an answer could come from the wrong one.

Each dataset now has a "Make this dataset available to Impact Assistant" checkbox on its "Edit" tab. Uncheck it and save, and Impact Assistant stops using that dataset immediately, even mid-conversation. Check it again and it's back right away.

## Customers

Customers

ExploreRecordsEdit

Name \*

Customers

Individual Records Track (Plural Noun) \*

Customers

Description

Type your description here

Record ID Column (From Source Data) \*

Customer ID

Defaults for Total Display

☒ Make this dataset available to Impact Assistant

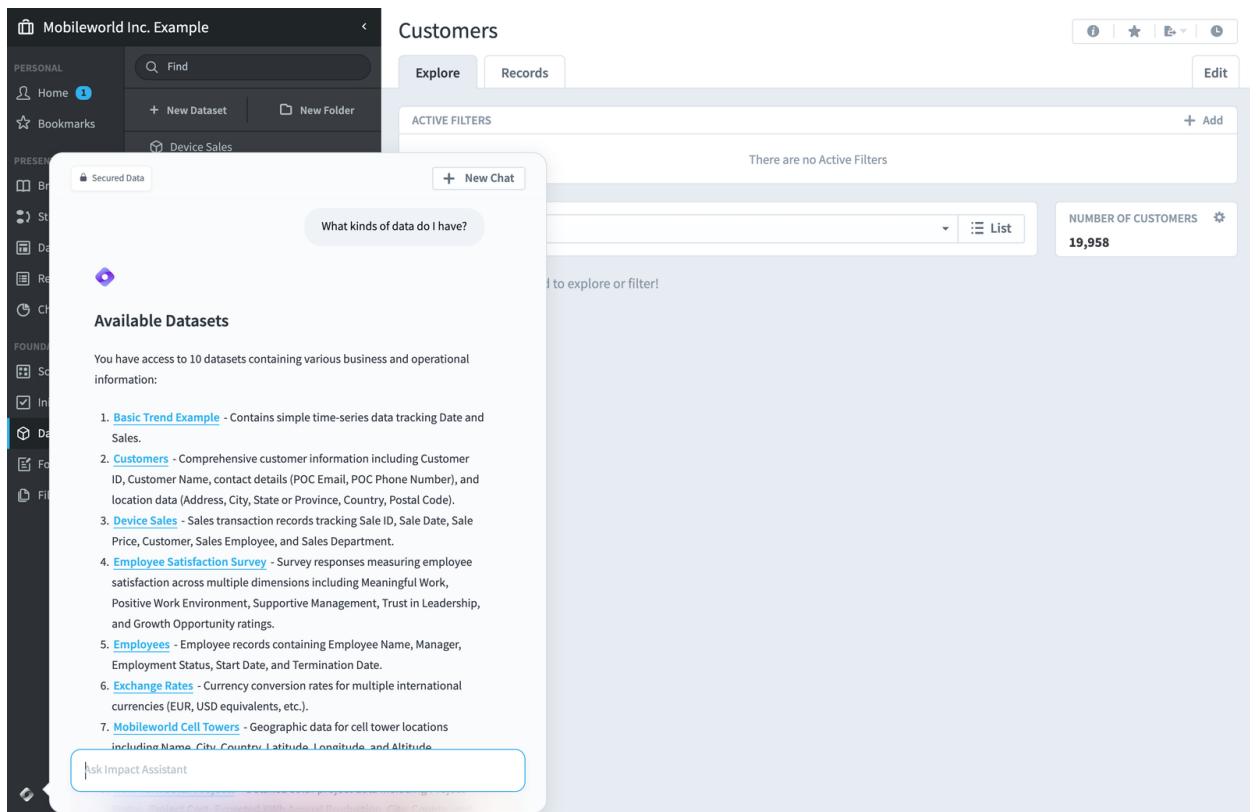
☐ Allow manually adding new records

A few things to know:

- Every dataset starts out available, so nothing changes until you exclude one.
- The checkbox appears only when Impact Intelligence is turned on.
- Your choices are kept even if Impact Intelligence is turned off and back on.
- An excluded dataset isn't described to the AI service at all, which also saves on AI costs.

## Impact Assistant in a floating panel

Impact Assistant now opens in a floating panel beside its icon at the bottom left of the screen, instead of a dialog you had to close before you could look at your data.



Click outside the panel to close it, like other panels in Spider Impact; your conversation is still there when you open it again. To start over, click "New Chat" in the panel's upper right.

## Faster Impact Assistant responses

Every question you ask Impact Assistant sends a lot of unchanging context along with it — instructions, the expected response format, and details of the datasets involved. Spider Impact now reuses that context instead of sending it fresh each time.

You'll notice it most on follow-up questions about the same datasets, and the larger your datasets, the more it saves in both response time and AI costs.

## Scorecards & Initiatives

### Approve KPI values through up to four levels

KPI value approval used to be a single step: an updater submitted a value and any owner could approve or reject it. Now you can build a sign-off chain of up to four levels.

An administrator sets the number of levels in Application Administration, under "Owner approval for KPI value updates". Each KPI then gets its own owners at each level, and a submitted value moves up the chain, needing approval at every level that has owners before it takes effect.

SCORECARDS

Owner Approval For Measure Value Updates

4 levels

Not required

1 level

2 levels

3 levels

4 levels

Threshold For Red Indicator On Measures Tab (Blank Is No Indicator)

3.3

Score

On each KPI, the "Owners" panel has a new "Approval Level" column for assigning each owner to a level. Here, a value from Dana Whitfield goes through four people, one at each level, before it takes effect.

| UPDATERS       |                          | UPDATE THRESHOLDS |
|----------------|--------------------------|-------------------|
| Add Updater... |                          |                   |
| Dana Whitfield | <input type="checkbox"/> |                   |

| OWNERS       | APPROVAL LEVEL   |
|--------------|------------------|
| Add Owner... |                  |
| Marsha Mello | Approval Level 1 |
| Priya Shah   | Approval Level 2 |
| Tom Becker   | Approval Level 3 |
| Elena Ruiz   | Approval Level 4 |

### *Seeing where a value stands*

A label such as "Approval 2 of 4" beside each pending value shows how far along it is. Approvers see it on the Home "Approve KPIs" page:

| MEASURE                                   | PERIOD      | <input checked="" type="checkbox"/> <input type="checkbox"/> | NEW VALUES         | OLD VALUES         | USER           |                        |
|-------------------------------------------|-------------|--------------------------------------------------------------|--------------------|--------------------|----------------|------------------------|
| MARKETING                                 |             |                                                              |                    |                    |                |                        |
| <a href="#">Telesales Calls Completed</a> | August 2026 | <input checked="" type="checkbox"/> <input type="checkbox"/> | Measure Value: 342 | Measure Value: 195 | Dana Whitfield | <b>Approval 2 of 4</b> |
| APPROVE/REJECT ALL NEW VALUES             |             | <input checked="" type="checkbox"/> <input type="checkbox"/> |                    |                    |                |                        |

Updaters see it too, on the Home "Update KPIs" page and next to their pending value when they open a KPI's update form, so they know the value is still working its way up the chain:

## Measure and Threshold Values: Edit Values

- To see more Measure values, choose a larger calendar in the calendar period selector.
- Some Measure values have not yet been approved. These values are indicated below in blue. These values will only show on update forms until they are approved. Changing a pending value resets the approval process from the start.

|             | N/A                      | Measure Value | Red | Goal |  |                 |
|-------------|--------------------------|---------------|-----|------|--|-----------------|
| August 2026 | <input type="checkbox"/> | 392           | 380 | 400  |  | Approval 1 of 4 |

Cancel

Save

Click it to see the whole chain in an "Approval Status" dialog: which levels have approved, who approved, and who's still to come. Approving and rejecting still happen on the "Approve KPIs" page.

## Approval Status for Telesales Calls Completed, August 2026

Submitted by Dana Whitfield on Sep 1, 2026

| APPROVAL        | OWNERS       | STATUS     | APPROVER     | DATE        |
|-----------------|--------------|------------|--------------|-------------|
| Approval 1 of 4 | Marsha Mello | ✓ Approved | Marsha Mello | Sep 1, 2026 |
| Approval 2 of 4 | Priya Shah   | Pending    | N/A          | N/A         |
| Approval 3 of 4 | Tom Becker   | Upcoming   | N/A          | N/A         |
| Approval 4 of 4 | Elena Ruiz   | Upcoming   | N/A          | N/A         |

Close

## *Earlier approvers hear about rejections*

If a value is rejected at a higher level, everyone who approved it earlier now gets an alert along with the original updater, explaining that their approval was overridden.

Measure values have been reviewed by Spider Impact Administrator

a month ago

 **Rejected**

August 2026

**Marketing**

Telesales Calls Completed

Changing Measure Value from 195 to 342 was rejected after you approved it





## *Assigning owners by level in bulk*

"Mass Edit Scorecard Items" now offers an owners field for each level, from "Approval Level 1 Owners" to "Approval Level 4 Owners", so you can assign owners to a level across many KPIs at once.

Field to Edit

| BASICS                    | MEASURES ONLY               |
|---------------------------|-----------------------------|
| T Name                    | 👤 Updaters                  |
| T Description             | T Data Type                 |
| 👤 Approval Level 1 Owners | # Decimal Precision         |
| 👤 Approval Level 2 Owners | T Aggregation Type          |
| 👤 Approval Level 3 Owners | T Template Rollup Equation  |
| 👤 Approval Level 4 Owners | T Missing Value Treatment   |
| T Tags                    | ✗ Are Higher Values Better? |
| % Weight                  | ✗ Is Yes Good?              |
| 📅 Start Date              | 💵 Currency                  |
| 📅 Archive Date            | T Units                     |
| T Scorecard Item Type     | T Equation                  |
|                           | # Default Threshold         |
|                           | T Scoring Type              |
|                           | T Update Type               |
|                           | 📅 Calendar                  |

Cancel

Done

### Owners show which level they belong to

Wherever a KPI's owners are listed together — the KPI's info dialog, scorecard reports, the "KPIs" tab, the KPIs Report, the Owner/Updater report, and Mass Edit — each owner now shows their level, like "Priya Shah (Level 2)" or "Marketing Team (Administrators, Level 1)".

## Measure Info

### BASIC INFO

|     |                           |
|-----|---------------------------|
| ID  | Name                      |
| 971 | Telesales Calls Completed |

### DETAILS

|         |        |               |          |           |                  |
|---------|--------|---------------|----------|-----------|------------------|
| Type    | Weight | Scoring Type  | Calendar | Data Type | Aggregation Type |
| Measure | 20%    | Goal/Red Flag | Monthly  | Number    | Sum              |

### FIELDS

|                     |                                   |                                   |
|---------------------|-----------------------------------|-----------------------------------|
| Measure Value       | Red Flag                          | Goal                              |
| Update Type: Manual | Update Type: Manual<br>Value: 380 | Update Type: Manual<br>Value: 400 |

### OWNERS

|                                                                                                            |                                                                                                          |                                                                                                          |                                                                                                            |
|------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------|
|  Marsha Mello (Level 1) |  Priya Shah (Level 2) |  Tom Becker (Level 3) |  Elena Ruiz (Level 4) |
|------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------|

### UPDATERS

\*Able to update scoring threshold values

|                                                                                                    |
|----------------------------------------------------------------------------------------------------|
|  Dana Whitfield |
|----------------------------------------------------------------------------------------------------|

## Importing KPI equations

Scorecard imports can now include KPI equations, so a scorecard and its calculations arrive together. Rolling out a structure full of calculated KPIs used to mean entering every equation by hand afterward — days of careful work on a large rollout.

Add an "Equation" column to the spreadsheet and write each equation using the KPI names in the same file, like "M(Web Orders) \* M(Average Order Value)". Spider Impact connects the references to the new KPIs as it imports them.

## Scorecard Item Import

This step allows you to choose what to import. The ignore checkboxes allow you to skip rows that you don't want to import, such as rows containing column headings.

### Available Column Labels

Perspective Objective Theme Measure Units Weight Is Yes Good? Are Higher Values Better? Description  
Start Date Archive Date Tags Threshold

| IGNORE                              | Objective           | Measure             | Calendar | Scoring Type  | Aggregation Type | Data Type | Equation                                               |
|-------------------------------------|---------------------|---------------------|----------|---------------|------------------|-----------|--------------------------------------------------------|
| <input checked="" type="checkbox"/> | Objective           | KPI                 | Calendar | Scoring Type  | Aggregation Type | Data Type | Equation                                               |
| <input type="checkbox"/>            | Grow Online Revenue |                     |          |               |                  |           |                                                        |
| <input type="checkbox"/>            |                     | Web Orders          | Monthly  | Goal/Red Flag | Sum              | Number    |                                                        |
| <input type="checkbox"/>            |                     | Average Order Value | Monthly  | Goal/Red Flag | Average          | Currency  |                                                        |
| <input type="checkbox"/>            |                     | Online Revenue      | Monthly  | Goal/Red Flag | Sum              | Currency  | $M(\text{Web Orders}) * M(\text{Average Order Value})$ |
| <input type="checkbox"/>            |                     | Revenue per Visit   | Monthly  | Goal/Red Flag | Sum              | Currency  | $M(\text{Online Revenue}) / M(\text{Site Visits})$     |
| <input type="checkbox"/>            |                     | Site Visits         | Monthly  | Goal/Red Flag | Sum              | Number    |                                                        |

Cancel

Back



Run Import

Threshold columns take equations too, so calculated thresholds come along. And "Send To" > "Scorecard Import File" writes every KPI's equations into the file by KPI name, so you can export a scorecard from one organization and import it into another with its calculations intact.

## The note and value cut-off dates now agree

A calendar's "Prevent KPI value updates after" and "Prevent note changes after" settings now lock on the same day. Notes used to lock a day earlier than values, so someone could add a value on the last day but not the note explaining it.

## Single Goal Number scoring type

Many KPIs have one number that really matters: the goal. The new "Single Goal Number" custom scoring type is built for them. You set the goal, and every other threshold is worked out from it, so a KPI with five color bands needs one number each period instead of four.

When you create the scoring type, you place each threshold as a share of the goal and pick its color. This "Revenue Target" type has five bands: red below a 2.5 score, then orange, yellow, and light green, and green once the KPI reaches its goal at 10.

## Edit Scoring Type

### Type

Standard

Custom

### Scoring Type Name \*

Revenue Target

### Measure Value Type



Multi-Threshold  
Number



Stabilize  
Number



Single Goal  
Number



Scored Text



Unscored Text

**Single Goal Number:** Set one goal value and Impact automatically calculates the other color thresholds from it. Best for straightforward Measures tracking toward a single target (e.g., set a \$150K profit goal and the green/yellow/red ranges are calculated automatically).

### Thresholds

| Score * | Goal                  |
|---------|-----------------------|
| 2.5     | <input type="radio"/> |
| 5       | <input type="radio"/> |
| 7.5     | <input type="radio"/> |
| 10      | <input type="radio"/> |

+ Add Threshold

On a KPI that uses it, the update form asks for only the value and the goal. Enter a \$40,000 goal and Spider Impact places the other thresholds at

\$10,000, \$20,000, and \$30,000 for you. With a "Multi-Threshold Number" type, you'd type all four every period.

### Measure and Threshold Values: Edit Values

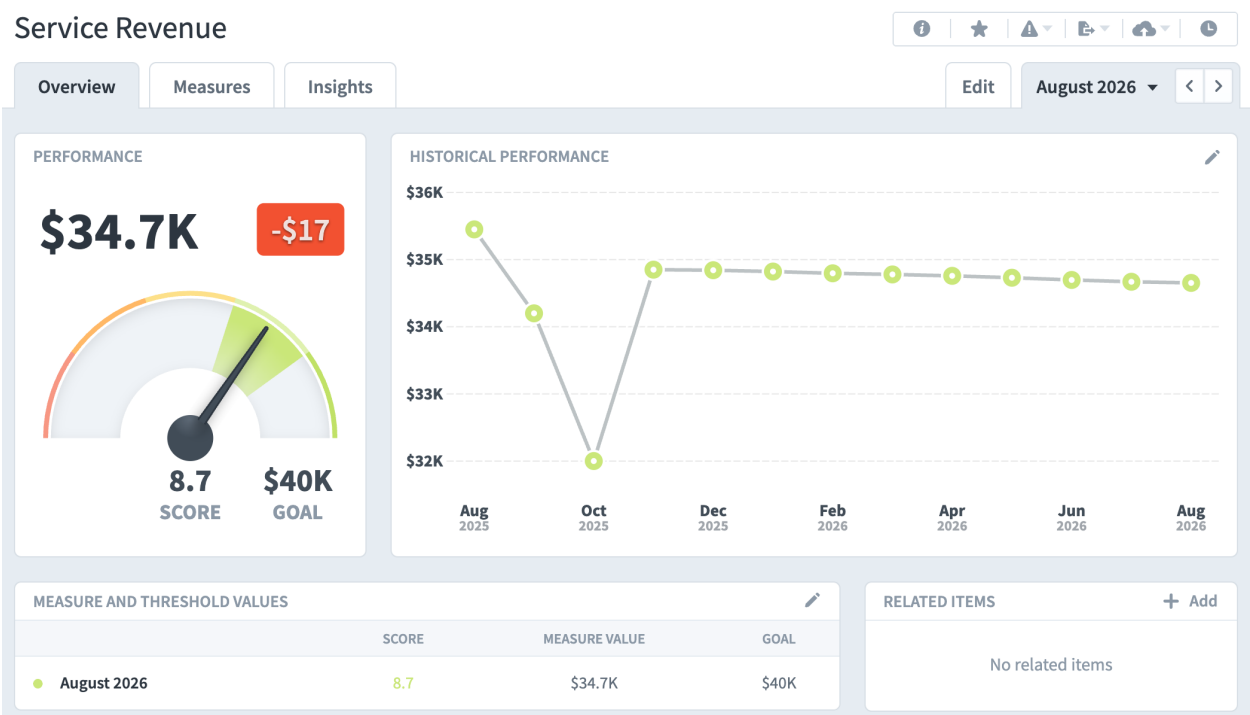
To see more Measure values, choose a larger calendar in the calendar period selector.

|             | N/A                      | Measure Value | Goal      |
|-------------|--------------------------|---------------|-----------|
| August 2026 | <input type="checkbox"/> | 34,653 \$     | 40,000 \$ |

Cancel

Save

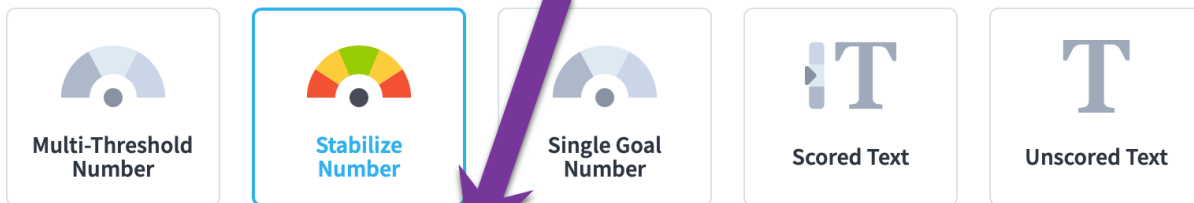
The KPI then scores by how close it gets to the goal, with zero as the worst result. Service Revenue came in at \$34.7K against its \$40K goal, a score of 8.7, in the light green band just short of the goal.



Because the scale runs from zero up to the goal, "Single Goal Number" is for KPIs where higher is better, and each goal must be greater than 0. For a KPI where lower is better, use "Multi-Threshold Number".

The other custom types have clearer names and descriptions too. "Number" is now "Multi-Threshold Number", and choosing any type shows a short description of when to use it.

#### Measure Value Type



**Stabilize Number:** Green sits in the middle, with yellow and red on both ends. Ideal for Measures where you want to hit a target range - neither too high nor too low.

## Minimum and maximum scores for each scoring type

Application Administration has always set the score range for the whole system (0 to 10 by default) and whether scores may go past it. Now each custom number scoring type can set its own limits as well.

The global settings decide which limits a scoring type can change. Here, scores may extend above 10 but not below 0:

SCORECARD SCORING

Show Scores As

Number

Percentage

Minimum Score \*

Maximum Score \*

0

10

Allow Scores To Extend Below 0

No

Allow Scores To Extend Above 10

Yes

So each custom number scoring type gets a "Maximum Score" field but no "Minimum Score" field, because nothing can score below 0 anyway. Allow scores below 0 as well and a "Minimum Score" field appears too. Leave a field blank for no limit, or set a cap. The "Revenue Target" type above caps scores at 15, so a KPI earns credit for beating its goal, up to 150%, without one runaway result distorting everything that rolls up above it.

## Thresholds

Score \* 2.5

Score \* 5

Score \* 7.5

Score \* 10

+ Add Threshold

Maximum Score 15

### *Putting them together: scoring as a percent of the goal*

These features work very well together when you want to enter a single goal, but score against it in a more nuanced way. For example, show scores as percentages for the entire application, then create a "Single Goal Number" type with the goal at 100%, yellow at 85%, orange at 70%, and red below 70%, capped at a 150% maximum. Updaters still enter only the goal each period.

## Edit Scoring Type

### Type

Standard

Custom

### Scoring Type Name \*

Percent of Goal

### Measure Value Type



Multi-Threshold  
Number



Stabilize  
Number



Single Goal  
Number



Scored Text



Unscored Text

**Single Goal Number:** Set one goal value and Impact automatically calculates the other color thresholds from it. Best for straightforward Measures tracking toward a single target (e.g., set a \$150K profit goal and the green/yellow/red ranges are calculated automatically).

### Thresholds

Score \*

70

%

Goal

Score \*

85

%

Goal

Score \*

100

%

Goal

+ Add Threshold

Maximum Score

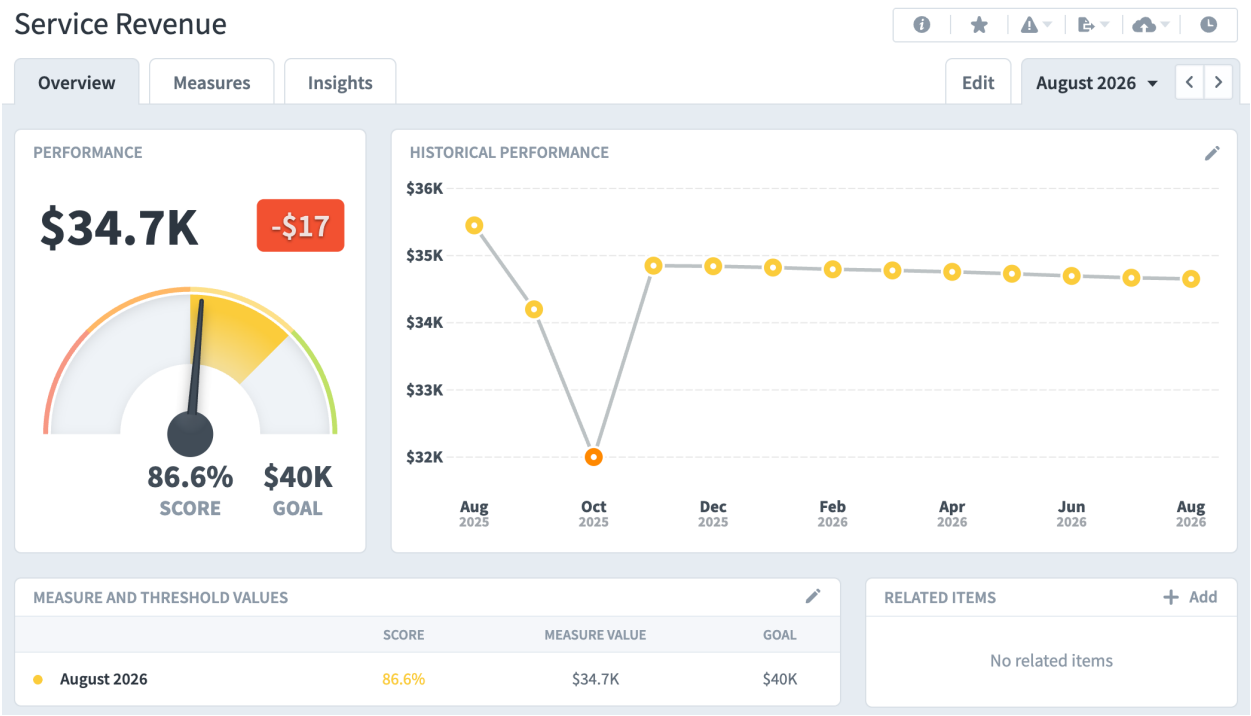
150

%

Cancel

Save

Service Revenue's \$34.7K against a \$40K goal now scores 86.6%, in the yellow band, and a \$70K month would score 150% rather than 175%. This is just one of many ways to combine them.



## Arabic scorecard import templates are readable

When you work in Arabic, the example file for a scorecard import now downloads as an Excel file, so the Arabic text displays correctly. The CSV version used to turn it into unreadable characters.

## New tasks land under the initiative you just created

Create an initiative and then a task or milestone, and the new item now goes under the initiative you just created, rather than the one you had selected before.

## Forms

Version 5.8 turned Forms into a platform for building applications, and 5.9 refines it. Forms now show which fields are required, can be pre-filled from a link, reach three new kinds of data in actions and conditions, narrow their

dropdowns and record lists to fit each person's earlier choices, and keep your place in record lists.

## Required fields are marked with a star

Required fields now show a blue star beside their label, so people know what to fill in before they press the button rather than after.

The stars keep up with the form: if an action makes a field required while someone is working, its star appears, and if an action relaxes the rule, the star goes away.

Your Name \*

Kyle Madison

Today's Date \*

10/23/2026



I prefer to submit this survey anonymously \*

No

### Meaningful Work

I can see myself working here in 5 years. \*

I find my work satisfying. \*

## Pre-fill form variables from a link

Form variables can now be filled in from the link you share, so every recipient can get their own version of the same form.

In the form editor, open "Set Variables". Every variable except a "Dataset Record" or "File" variable now has an "Allow this variable to be set from the URL" checkbox.

## Form Variables

Form variables are temporary values that exist alongside the "Current Record" values while the form is being used. They're useful for storing intermediate calculations, temporary selections, or data that doesn't need to be saved to your dataset.

When you enable "Allow this variable to be set from the URL," you can pre-fill that variable by including it in your shared form link. For example, <https://yourserver.example.com/forms/2401/shared/6532BCDA892BA2362?vehicleId=123> would set the vehicleId variable to 123. This is useful for sending customized form links, but only enable it for non-sensitive data since URL parameters are visible to anyone who sees the link.

FORM VARIABLES

Variable Name \*

vehicleId

Data Type

T Text

Default Value

☒ Allow this variable to be set from the URL

Cancel

Done

Turn it on, then add the variable to the form's shared link:

<https://yourserver.example.com/forms/2401/shared/6532BCDA892BA2362?vehicleId=123>

That link opens the form with "vehicleId" already set to "123", and any actions on that field run just as if the person had typed the value.

A few things to keep in mind:

- Use this only for values that aren't sensitive — anyone with the link can see and change them.
- Write dates as "2025-11-25", times as "14:30", and both together as "2025-11-25T14:30".
- Special characters such as "&", "+", "%", and "#" must be URL-encoded.

## New data options for actions and conditions

Forms use your data in two places — when a "Set a value" action copies a value:

Action

Value To Set \*

Set Value To \*

Set a value

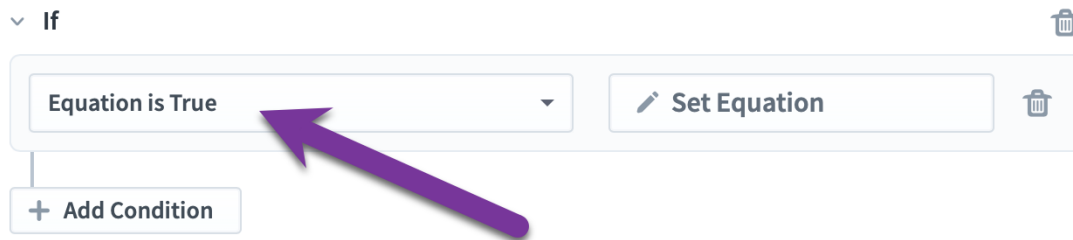
Employee Name

Result of Equation

Set Equation

+ Add Action

...and when a condition or equation tests one:

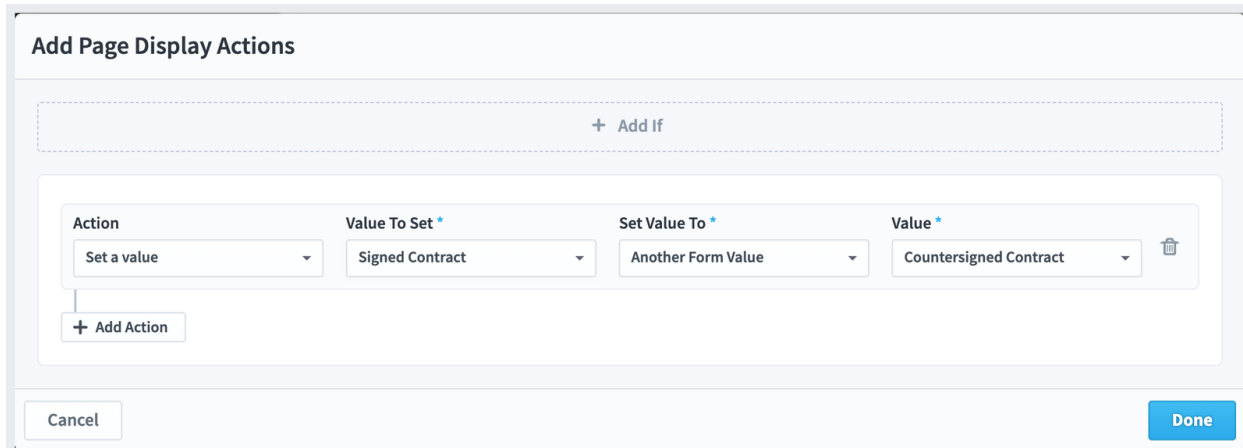


Both can now use three new kinds of data: files, calculated fields, and values from linked datasets.

## *Files*

Files now work like any other form value. A form variable can have the "File" data type, and a "Set a value" action can copy a file to or from the current record, a "Dataset Record" variable, or a linked dataset. Single Field widgets can also display a file held in a "Dataset Record" variable.

Since you can't type in a file, a file field can be set only to "Blank" or to "Another Form Value" — a file that already exists elsewhere on the form.



## *Calculated fields*

Calculated fields are now available wherever a form reads a value. Choose one under "Another Form Value" in a "Set a value" action to copy its result into a field or variable, whether the calculation lives on the form's own dataset or a linked one. Because a calculated field is a result, you can copy from it but not write to it.

**Add Page Display Actions**

+ Add If

| Action      | Value To Set * | Set Value To *     | Value *     |
|-------------|----------------|--------------------|-------------|
| Set a value | Tax Amount     | Another Form Value | Grand Total |

+ Add Action

Cancel Done

## *Combining values from linked records*

Conditions and equations can now test values from linked records, and "Set a value" actions can reach every kind of linked record. When a record links to several others, "Set a value" combines their values using the "Aggregation Type" you choose — "Sum", "Average", "Minimum", "Maximum", and more. If the linked values can't be combined into the field you're setting, the action editor tells you and suggests choosing a different source or target field.

**Add Page Display Actions**

+ Add If

| Action      | Value To Set * | Set Value To *     | Value *                   |
|-------------|----------------|--------------------|---------------------------|
| Set a value | Lifetime Value | Another Form Value | Sale Price (Device Sales) |

Aggregation Type \*

+ Sum

+ Add Action

Cancel Done

## Suggestion Filters on Single Field widgets

A Single Field widget that suggests existing values, or offers records from a linked dataset, used to offer everything the person could see. Its settings now have a "Suggestion Filters" panel, so the widget offers only values from records that match. A Salesperson field, for example, can offer only active employees.

The screenshot shows a form with three dropdown menus: 'Dataset \*' with 'Employees' selected, 'Field \*' with 'Sales Employee' selected, and 'Input Validation' with 'Input is Required' selected. Below these is a 'SUGGESTION FILTERS' section with a '+ Add' button. A light blue box contains the text 'Only suggest values from records that match these filters.' Below this, a filter is applied: 'Employment Status: is Active'.

A filter's value can also come from one of the form's variables, through "Add Equation". The suggestions then follow the person's earlier choices: once they pick a site, an audit question offers only the open cases at that site, and the list updates if they pick a different site.

### ***Showing part of a list of linked records***

When a Single Field shows the records that link to the current one, such as the evidence attached to an audit response, its Suggestion Filters also decide which of those records it shows. Put several of these widgets on one page, each filtered differently, and each shows its own slice, such as the evidence for each audit question. A record added with "New" starts out with the values its filters call for, so evidence added under a question is filed under that question.

### ***Linking records through a connecting dataset***

Some links need details of their own, such as the audit question a case was cited under. That takes a connecting dataset, such as a Case Links dataset that links a response to a case and records the question. A Single Field can now work through it directly. People pick existing cases, and each pick creates the connecting record with the question already filled in. Removing a case removes only that connection. Nobody types a case ID, so nobody can mistype one.

## Record lists remember your search and sort

Record lists now keep your search and your sort together. Sort a column and your search stays applied; run a search and your sort stays in place. Move to another page of the form, edit and save a record, and come back, and the list is still searched and sorted the way you left it.

| <input type="text" value="aiko"/> |                |               |                            |                |
|-----------------------------------|----------------|---------------|----------------------------|----------------|
|                                   | POC FIRST NAME | POC LAST NAME | POC EMAIL                  | COUNTRY TEXT ^ |
| <a href="#">Edit Customer</a>     | Aiko           | Buentello     | aiko.buentello@hotmail.com | United Kingdom |
| <a href="#">Edit Customer</a>     | Aiko           | Brazille      | abrazille@gmail.com        | United States  |
| <a href="#">Edit Customer</a>     | Aiko           | Cration       | aiko.cration@hotmail.com   | United States  |
| <a href="#">Edit Customer</a>     | Aiko           | Garcea        | aiko_garcea@garcea.org     | United States  |

## Record lists show up to 1,000 records

Record lists now show up to 1,000 records at a time instead of 100, so you can browse further without inventing search terms. Beyond 1,000 records, the list asks you to keep typing to narrow the results.

## Record lists can show fields from linked records

A Record List widget used to show only fields from the form's own dataset. "Add Column" now offers visible linked fields too, so a customer list can show each customer's sales and the salespeople who made them. When a column comes from the many side of a link, such as a customer's many sales, choose how to combine the values: "Sum" adds up the sale prices, and "List Unique Values" names each salesperson once. Columns from linked records are read-only and can't be sorted, but searching the list also searches any linked column that comes from a single record, such as each sale's customer.

| Find          |                |               |               |            |                                   |
|---------------|----------------|---------------|---------------|------------|-----------------------------------|
|               | POC FIRST NAME | POC LAST NAME | COUNTRY TEXT  | SALE PRICE | SALES EMPLOYEE                    |
| Edit Customer | Abby           | Willers       | United States | \$1,180.21 | Hollie Pennigton, Issac Bernhardt |
| Edit Customer | Adelaida       | Dossman       | United States | \$643.02   | Issac Bernhardt                   |
| Edit Customer | Adria          | Badour        | United States | \$541.35   | Delphine Calmes                   |
| Edit Customer | Adrian         | Kleck         | United States | \$916.83   | Odell Sheler                      |
| Edit Customer | Adrian         | Blagman       | United States | \$1,281.57 | Hollie Pennigton, Issac Bernhardt |
| Edit Customer | Agnus          | Petrick       | United States | \$2,148.97 | Hollie Pennigton, Issac Bernhardt |
| Edit Customer | Aiko           | Brazille      | United States | \$408.10   | Edmond Zehrbach                   |
| Edit Customer | Aisha          | Syta          | United States | \$498.82   | Odell Sheler                      |

## Record list filters can use the form's variables

A Record List widget's filters can now use the form's variables as values. Click "Add Equation" on a filter and choose a variable, and the list re-filters itself whenever that variable changes. Pick a country at the top of a page, and the Record List below it shows only that country's customers. If the variable is blank, the filter looks for blank values, so until someone picks a country, the list shows only customers with no country.

Country

Canada

| Find          |                |               |              |            |                                                  |
|---------------|----------------|---------------|--------------|------------|--------------------------------------------------|
|               | POC FIRST NAME | POC LAST NAME | COUNTRY TEXT | SALE PRICE | SALES EMPLOYEE                                   |
| Edit Customer | Aaron          | Meighan       | Canada       | \$716.71   | Hollie Pennigton                                 |
| Edit Customer | Abbey          | Geel          | Canada       | \$736.33   | Odell Sheler                                     |
| Edit Customer | Abbie          | Melito        | Canada       | \$954.53   | Delphine Calmes, Hollie Pennigton                |
| Edit Customer | Abbie          | Meranda       | Canada       | \$5,651.37 | Micheline Turkasz, Issac Bernhardt, Odell Sheler |
| Edit Customer | Adam           | Giggey        | Canada       | \$648.23   | Edmond Zehrbach                                  |
| Edit Customer | Adela          | Barberr       | Canada       | \$915.51   | Edmond Zehrbach, Micheline Turkasz               |

## Left-aligned buttons come first in button settings

In a Buttons widget's settings, "Left-Aligned Buttons" now comes before "Right-Aligned Buttons", matching the order you see them on the form.

The screenshot shows the 'Edit Buttons Widget' configuration window. It is divided into two main sections: 'BASIC' and 'WIDGET CONFIGURATION'. The 'BASIC' section has a 'Label' text field and a 'Description' text area. The 'WIDGET CONFIGURATION' section is further divided into 'Left-Aligned Buttons' and 'Right-Aligned Buttons'. Under 'Left-Aligned Buttons', there is a 'Button Text' field with the example 'Create New Customer', an 'Appearance' section with 'Primary' and 'Secondary' buttons, and a 'Set State & Actions' button. Below these are two '+ Add Button' buttons. The 'Right-Aligned Buttons' section also has a '+ Add Button' button. At the bottom of the 'WIDGET CONFIGURATION' section is a checkbox labeled 'Use As The Bottom Sticky Button Bar'. At the very bottom of the window are 'Cancel' and 'Done' buttons.

## Date pickers go back to 1925

The date picker used to stop at 2015. You can now pick any year back to 1925, which makes birth dates, hire dates, and other history easy to enter.

## Performance improvements for forms

Version 5.8 made large forms dramatically faster, and 5.9 speeds them up again. Large pages that used to keep people waiting now open almost immediately, and they're much faster on slow connections too.

- **Records open faster.** When a form checks which fields to show and which buttons to enable, Spider Impact now loads only what those checks need instead of the entire form.
- **Opening a record from a list is quicker.** Spider Impact now fetches the record, the page it opens on, and that page's rules together, instead of waiting for each in turn, which helps most on slow connections.

- **Pages with many rules open much faster.** A page now checks all of its show, hide, and enable rules together, instead of one group at a time.
- **Hidden fields wait until they're needed.** Fields that start out hidden are built only when they're shown, so pages full of conditional questions open faster.
- **Records with many files open much faster.** Pages full of attached files, such as library records, no longer slow the browser down with every file.
- **Large forms and dashboards load faster.** Spider Impact does much less work behind the scenes each time a page opens or checks its rules.
- **Fields appear and disappear more smoothly.** When an answer shows or hides other fields, the page responds more quickly.
- **Large linked-field widgets no longer freeze the browser,** including in Safari.
- **Record lists with many editable columns scroll more smoothly.**
- **Forms clean up after themselves.** Closing a record now frees the browser memory it used, so working through record after record no longer slows the browser down.
- **Going back is quicker.** Returning to a record list, or moving between sections of an App, takes fewer trips to the server.

## View-only users can use navigation buttons

Form buttons used to be disabled for anyone who couldn't modify the form's records, even a button that only goes back to a list. Now a button stays enabled for people who can only view records, as long as none of its actions saves a record, including the actions of any dialog it opens. Buttons that save still require permission to modify records.

## The cursor starts in the first field

When a form page opens, the cursor is already in its first field you can edit, so people can start typing right away. That's especially handy on shared forms and in Apps.

## Recording actions when you're logged in as someone else

Administrators can log in as another user to see exactly what that person sees. Until now, a form that recorded the user's name recorded only the person being impersonated.

The "User's Name" value now includes both — "Scott O'Reilly as Conor Crimmins" — so records show who actually made the change. Everything else on the form still behaves as it would for the user you're logged in as, so testing works exactly the same.

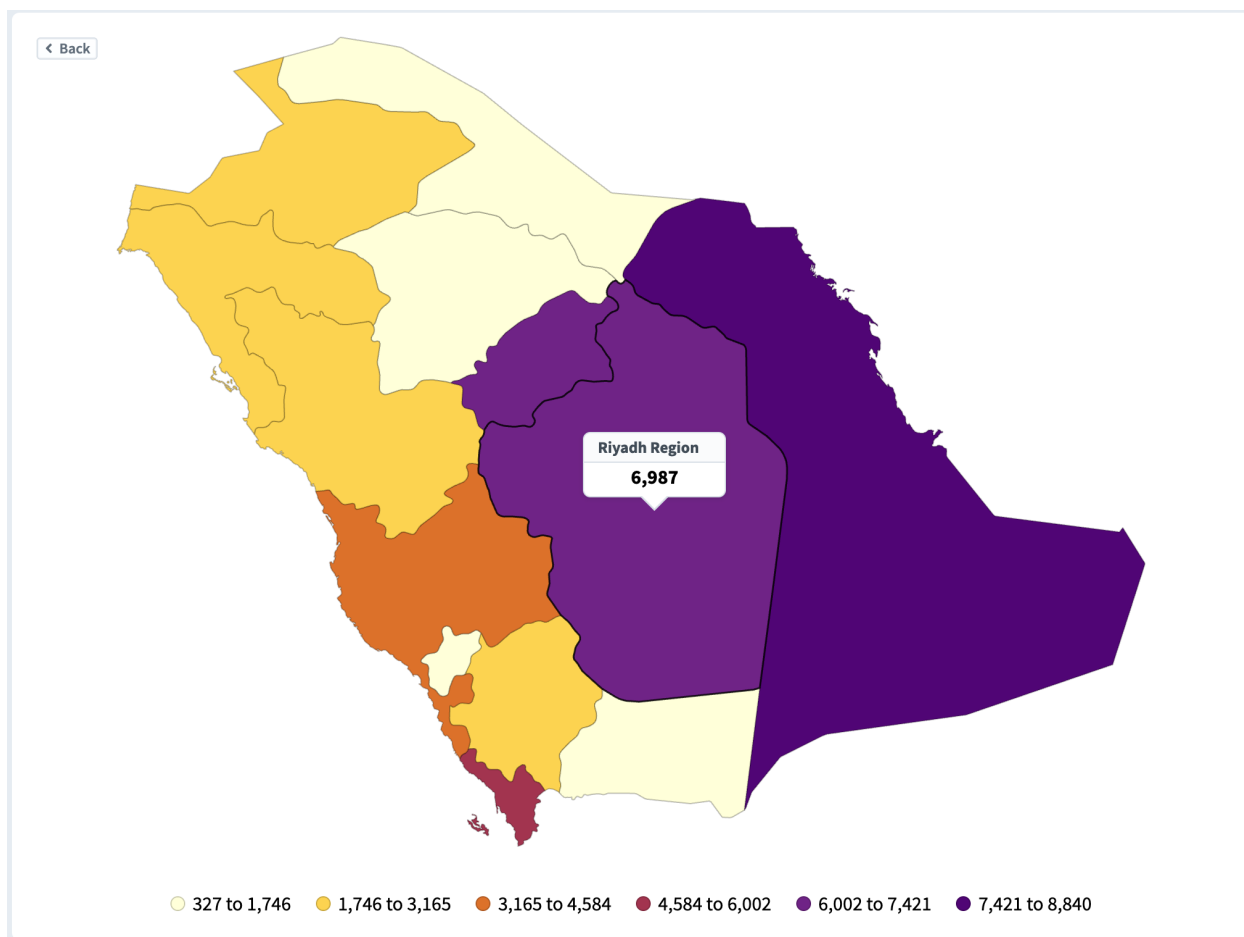
Submitted By

Spider Impact Administrator as Priya Shah

## Dashboards & Charts

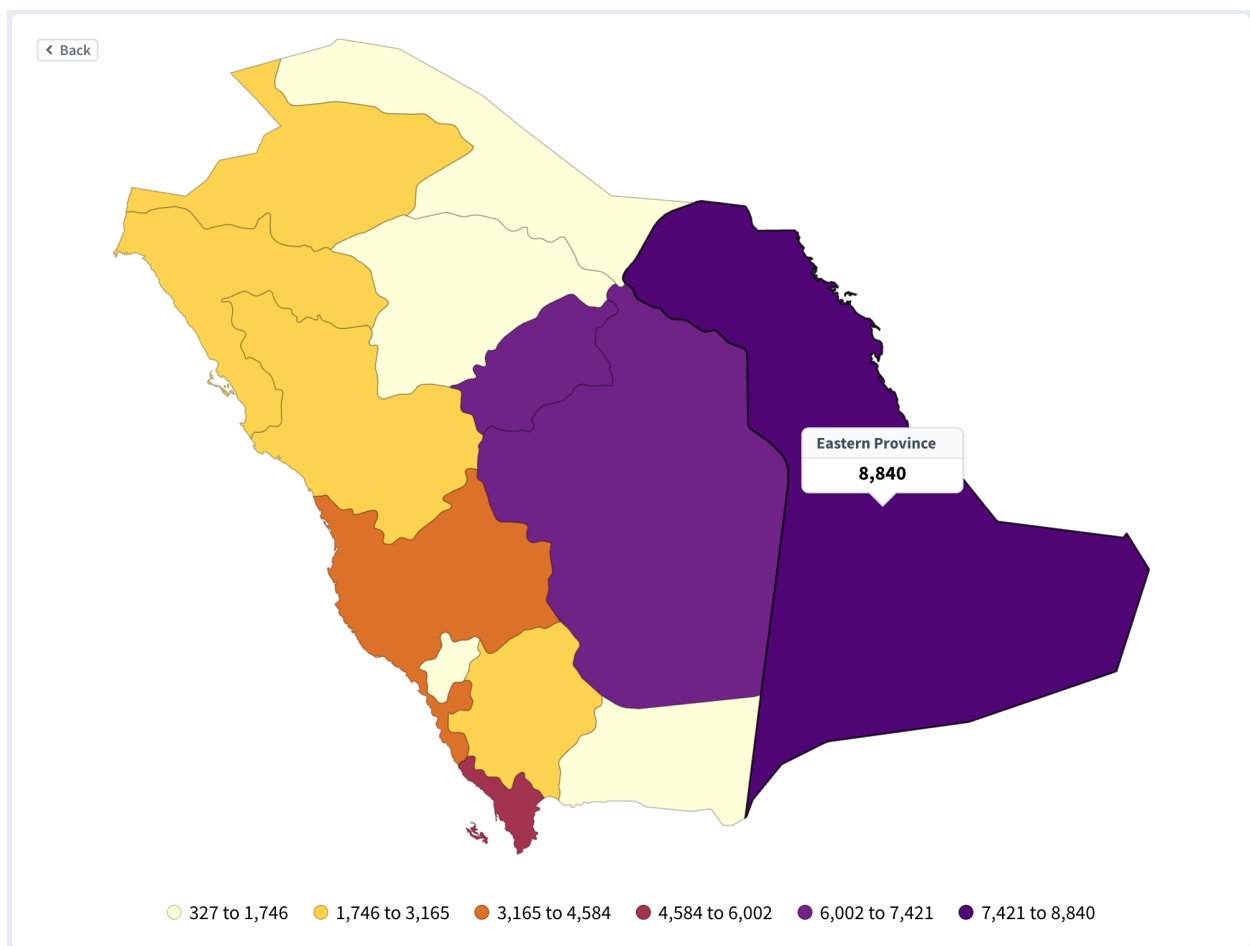
### More of the map responds when you hover or click

Hover over a French department, a Turkish province, or any of thousands of other places on a filled map and you'll now see its value. Where there's more detail underneath, a click takes you into it. Spider Impact only offers that click where the next level can actually be drawn, so you'll never drill into an empty map.

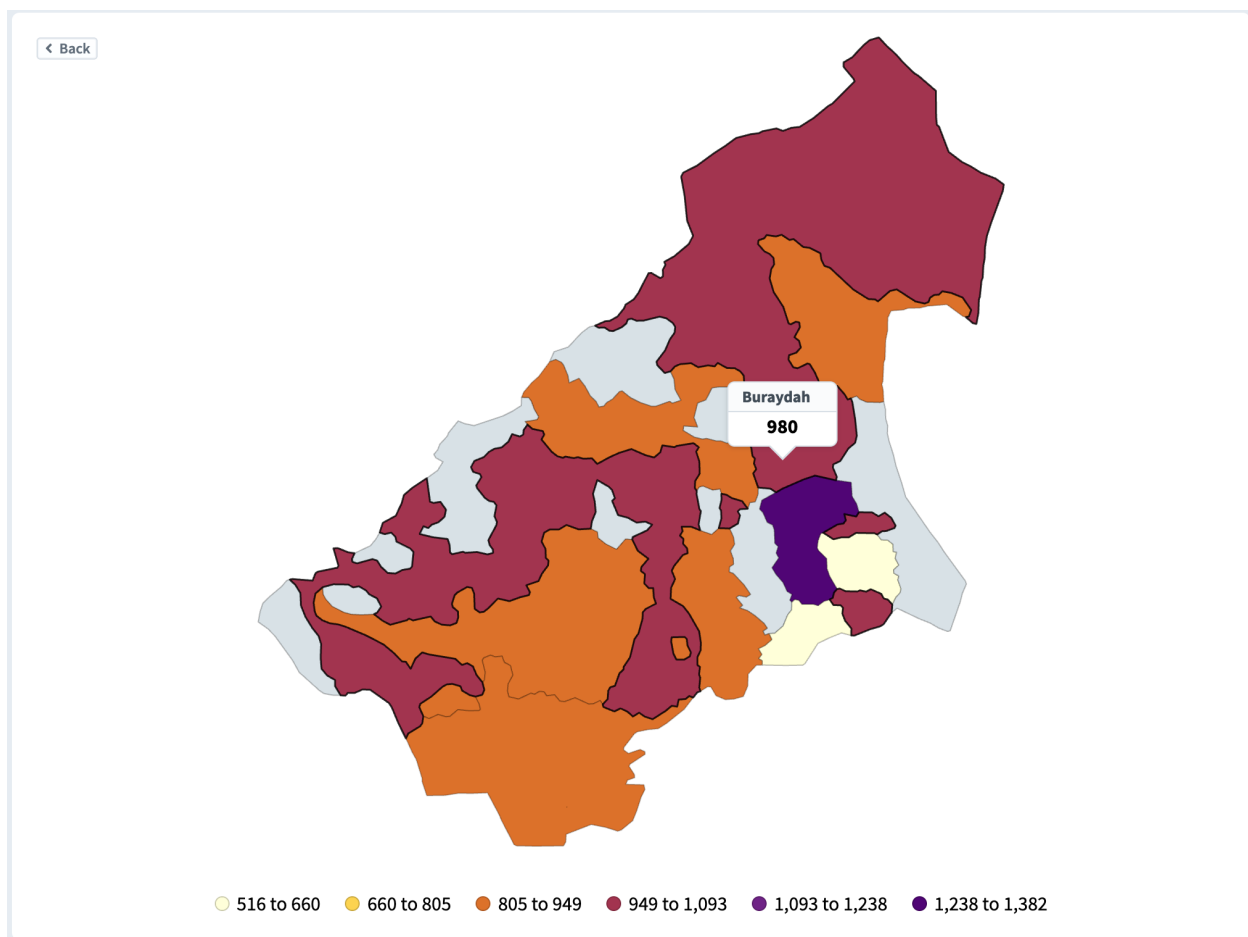


## Saudi Arabia and the UAE drill down to their cities

Maps of Saudi Arabia and the United Arab Emirates used to stop at the country border. Now you can click into any of Saudi Arabia's thirteen regions, on through its governorates, and down to individual cities — and into each emirate and straight on to its cities.



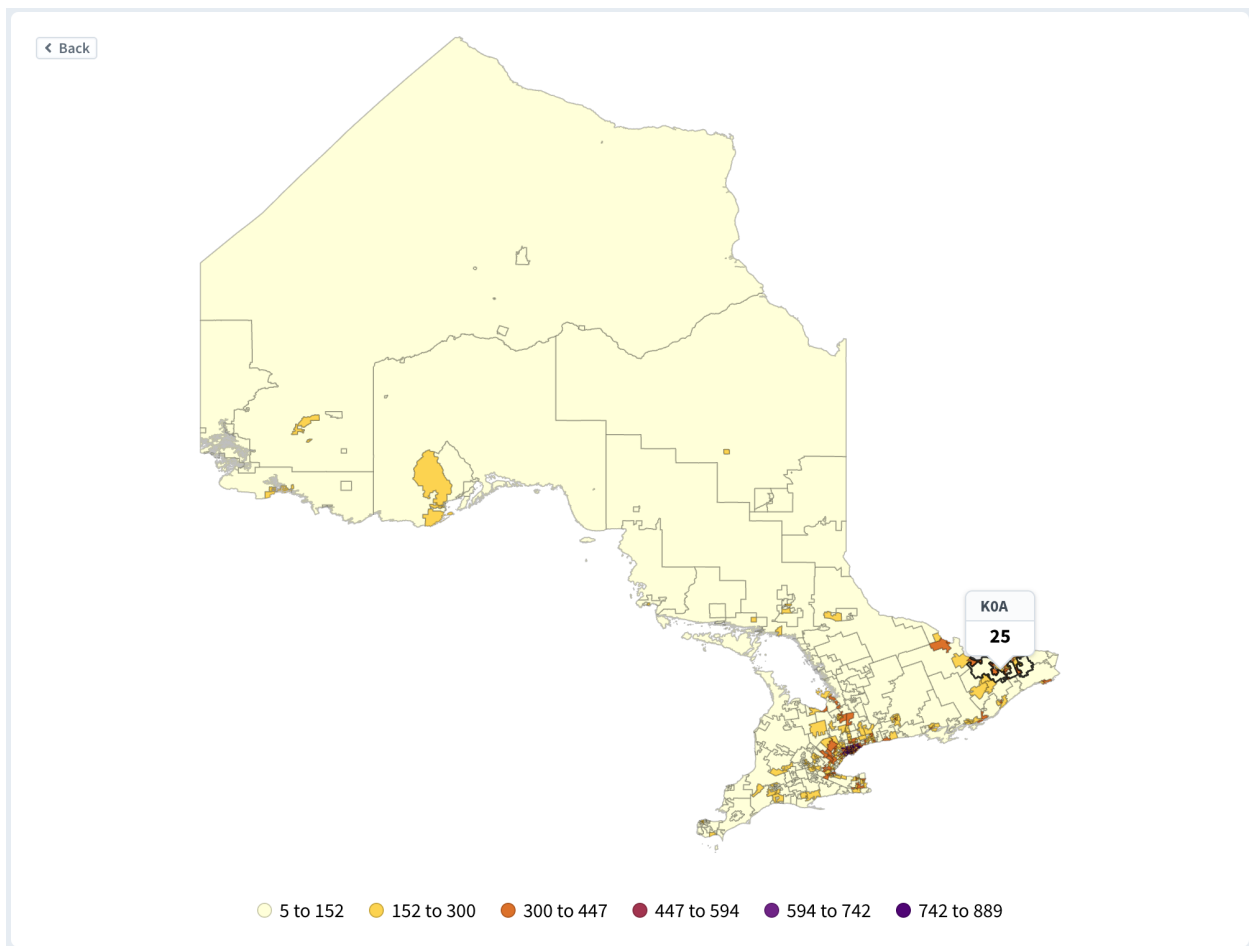
Click a region and its governorates are colored by your data too, each with its own value on hover.



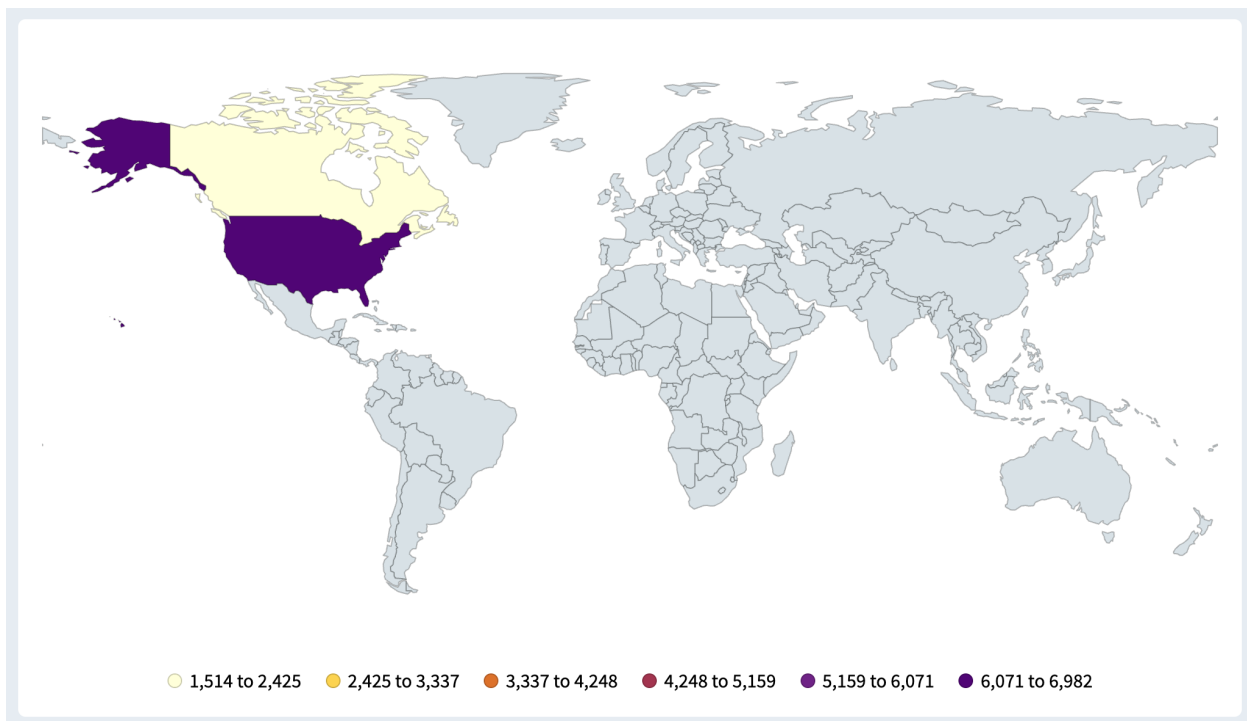
There are far more cities to land on, too: more than ninety in Saudi Arabia, up from four, and twenty-five in the UAE, up from one. Your data doesn't need a governorate column to reach them; a region and a city are enough.

## Canadian postal codes

You can now map Canadian postal codes. Drill into a province and each postal area is colored by your data, just as US ZIP codes are. Full six-character codes like "K1A 0B1" work as they are, with no need to trim them to their three-character area first.



With two countries to show, postal code maps can now start from the whole world. Turn on "2D Earth", "3D Earth", or "Continent" in "Map Levels" and the map opens with Canada and the United States colored in; click either one to drill down through its states or provinces to individual postal codes. New postal code maps start from the world view by default.



Canadian city maps are more detailed too, growing from about 800 cities to nearly 2,000.

## Maps recognize places the way your data names them

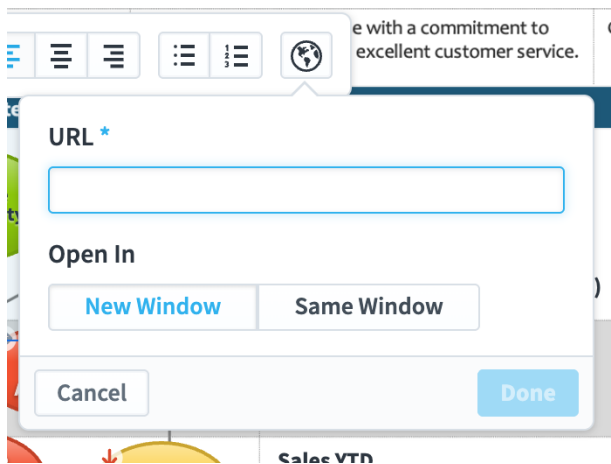
Spider Impact now recognizes far more of the ways people write place names, so more of your data lands on the map:

- **Countries** match their everyday name, official name, or three-letter code — "Germany", "Federal Republic of Germany", and "DEU" all work — plus unambiguous codes like "US", "CA", "UK", "KSA", and "UAE".
- **States and provinces** match their abbreviations, so "AZ" finds Arizona and "QC" finds Québec, and Canadian and Australian ones also match their everyday names, like "Quebec", "New Brunswick", and "New South Wales".
- **Saudi regions and the emirates** also match everyday English names and codes, like "Riyadh", "Sharjah", and "SA-01".
- **US counties** match without their suffix, so "Monroe" finds Monroe County in the right state.
- **Saudi governorates** match without accent marks, so "Khamis Mushayt" finds "Khamīs Mushayṭ".

- **Capitalization** never matters.

## Text widget links can open in the same window

Links in a text widget always used to open a new window, so a dashboard used as a home page left a trail of windows behind it. When you add or edit a link, you can now choose "Same Window" or "New Window". Use "Same Window" for links to other screens in Spider Impact, and "New Window" for everything else.

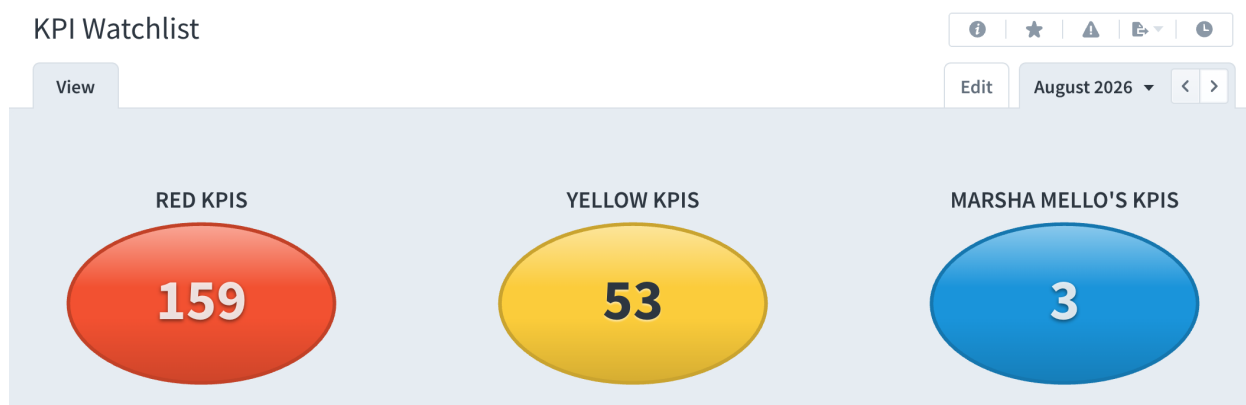


## Drilldowns from a shared dashboard keep their field and filters

Clicking a dataset value widget on a shared dashboard now takes you to the same field, with the same filters applied, as it does inside the application, so the number you land on matches the number you clicked. It works whether or not the viewer is signed in.

## Shape widgets can count scorecard items

A shape widget can now show a count of scorecard items instead of a single item's value — just what you need for a summary like "nine KPIs in this pillar, two of them red." Put a few side by side and you have an at-a-glance watchlist: how many KPIs are red, how many are yellow, and how many belong to a particular person.



In "Set Data Source", choose "Item Count" under "Value Or Count". Then pick which items to count using the same filters as scorecard item reports: by color, type, organization, and more.

### Set Data Source

Item Type

**Scorecard** Initiative Dataset None

Value Or Count

Single Item **Item Count**

FILTERS + Add

Specific Organizations: is any of the following: Mobileworld Inc. Example

Scorecard Item Type: is any of the following: Measure

CALENDAR Current Calendar

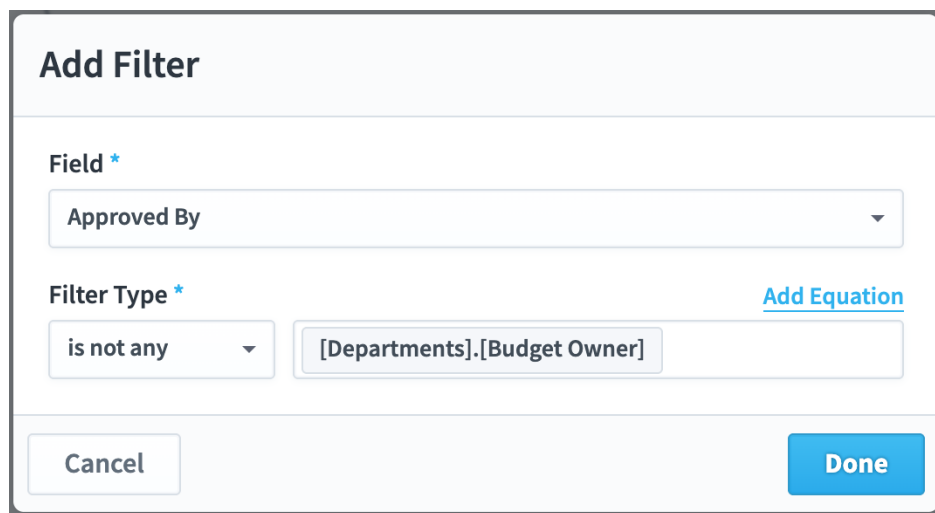
SHOW Current Period

Cancel Done

## Datasets

### Filter values can come from linked datasets

A dataset filter used to compare a field only against values you typed in. Now an "is any" or "is not any" filter can compare it against a field in a linked dataset. Click "Add Equation", switch the "Dataset" dropdown from the dataset you're filtering to a linked one, and choose a "Field" from it. Each record is then checked against its own linked values. For example, an Expenses dataset linked to Departments can show only the expenses approved by someone other than their department's budget owner, and the filter stays right as budget owners change.



**Add Filter**

Field \*

Approved By

Filter Type \*

is not any

[Add Equation](#)

[Departments].[Budget Owner]

Cancel Done

This works wherever you filter a dataset: the "Explore" and "Records" tabs, reports, charts, dashboard widgets, and Record List widgets on forms.

The "Dataset" dropdown lists every dataset you can reach through links, not just the ones linked directly, and if there's more than one way to reach it, "Choose Path to Dataset" lets you pick which links to follow. The "Field" dropdown offers only fields you can compare: text with text, and number, currency, and percentage fields with one another.

### Export large datasets to CSV

The "Records" tab can now export to CSV as well as Excel. CSV files are built on the server rather than in your browser, so even very large datasets export

without trouble. Small files download right away; for bigger ones, Spider Impact alerts you when the file is ready.

New York Solar Projects

Explore Records

ACTIVE FILTERS

There are no Active Filters

RECORDS (20,000 OF 115,543)

| \$ INCENTIVE | AFFORDABLE SOLAR | CITY      | COMMUNITY DISTRIBUTED GENERATION | CONTRACTOR                               | COUNTY        | DATE APPLICATION RECEIVED | DATE COMPLETED | ELECTRIC UTILITY           | EXPECTED KWH ANNUAL PRODUCTION |
|--------------|------------------|-----------|----------------------------------|------------------------------------------|---------------|---------------------------|----------------|----------------------------|--------------------------------|
| \$3,240      | No               | Fairport  | No                               | GreenSpark Solar (dba for Sustainable... | Monroe County | May 23, 2017              | Jun 13, 2017   | Rochester Gas and Electric | 8,732                          |
| \$3,163      | No               | Rochester | No                               | Geotherm Inc                             | Monroe County | Nov 5, 2015               | Apr 7, 2016    | Rochester Gas and Electric | 6,523                          |

Send To

- Briefing
- CSV
- Excel

Edit

Add

Spider Impact also warns you before an Excel export gets too big. For a large export it suggests CSV instead, though you can still continue with Excel. For one too large for Excel to handle, it points you straight to CSV.

GreenSpark Monroe

This export contains a large amount of data that may cause your browser to slow down or crash. We recommend using the CSV export option instead, which can handle larger datasets more reliably.

Cancel

Export to Excel

Operations Inc. County

Suffolk

## Imports no longer collide with records you added by hand

A dataset can hold both imported records and records entered by hand. If an import used a Record ID that already belonged to a manual record, the dataset used to fail to build. Now Spider Impact checks a spreadsheet before uploading it. If any Record IDs match records added by hand, it stops and lists them, so you can fix the file and upload it again:

*The file cannot be uploaded. These Record ID values match records that were added manually: 1041, 1042*

The same check runs when you upload a new revision of a spreadsheet on the "Files" page, and lists the conflicts for each dataset the file feeds.

Some conflicts can only be found while the dataset builds, such as linked and rollup Record IDs. Those rows are skipped, the rest of the file imports normally, and the "Edit" tab tells you which Record IDs were skipped:

*Some records from your last import were skipped because they have the same record IDs as records you created manually in the software: 1041, 1042. These records were not imported to prevent overwriting your manual entries.*

Records you enter by hand are never overwritten by an import.

## **Empty sums and averages show blank instead of zero**

When a "Sum", "Average", "Minimum", or "Maximum" has no records to work with, it now shows blank everywhere, rather than "0" in some places and blank in others. That includes form equations, calculated value widgets, calculated chart series, the "Explore" tab, and dataset reports.

Counts still show "0", since zero is a real answer to "how many."

## **File fields can be used in equations**

File fields now appear in the equation editor like any other field, so you can, for example, check whether a record has a file attached.

## **A clearer message while a rollup tree rebuilds**

After most changes, a dataset keeps showing its old data while it rebuilds. Changing a rollup tree is the exception, because the totals have to be recalculated first. The message you see in the meantime now explains exactly that:

*This dataset uses a rollup tree that was recently modified. It is currently being rebuilt to ensure correct aggregations before data can be displayed.*

## Rollup fields can be changed to linked fields

A rollup field's "Data Type" can now be changed to "Dataset Link", even after records have been added, as long as the dataset it links to uses a rollup field as its Record ID.

## Reports

### Report headers stay put when you scroll

Column headings now stay at the top of a report as you scroll, so you always know which column you're reading. That's true in the Reports section and in report widgets on dashboards, and it matches how the Datasets "Explore" tab, the scorecard "KPIs" tab, and dashboard dataset tables already work.

Measures by Organization

View

EditSeptember 2026

Organization: Caitlin Customer Support

Data Type: Number

| NAME                                      | MAY 2026      | JUNE 2026     | JULY 2026     | AUGUST 2026   | SEPTEMBER 2026 |
|-------------------------------------------|---------------|---------------|---------------|---------------|----------------|
|                                           | MEASURE VALUE | MEASURE VALUE | MEASURE VALUE | MEASURE VALUE | MEASURE VALUE  |
| Caitlin Calls Answered                    | 94            | 129           | 124           | 115           | 113            |
| Caitlin Calls Abandoned                   | 74            | 77            | 47            | 23            | 58             |
| Caitlin Average time to answer (seconds)  | 5             | 0             | 34            | 45            | 59             |
| Caitlin Average time to resolve (hours)   | 30            | 8             | 0             | 3             | 0              |
| Caitlin Calls Transferred                 | 0             | 9             | 0             | 29            | 66             |
| Caitlin Calls Requiring Tier 2 Escalation | 53            | 51            | 35            | 0             | 28             |

Data Type: Percentage

| NAME                          | MAY 2026      | JUNE 2026     | JULY 2026     | AUGUST 2026   | SEPTEMBER 2026 |
|-------------------------------|---------------|---------------|---------------|---------------|----------------|
|                               | MEASURE VALUE | MEASURE VALUE | MEASURE VALUE | MEASURE VALUE | MEASURE VALUE  |
| Caitlin % Calls answered      | 56%           | 62.6%         | 72.5%         | 83.3%         | 66.1%          |
| Caitlin % Calls abandoned     | 44%           | 37.4%         | 27.5%         | 16.7%         | 33.9%          |
| Caitlin First call resolution | 100%          | 100%          | 100%          | 100%          | 0%             |
| Caitlin Transfer rate         | 0%            | 7%            | 0%            | 25.2%         | 58.4%          |

Group headings stay put too, so in a grouped report you always know which group you're reading, even after "Group Again".

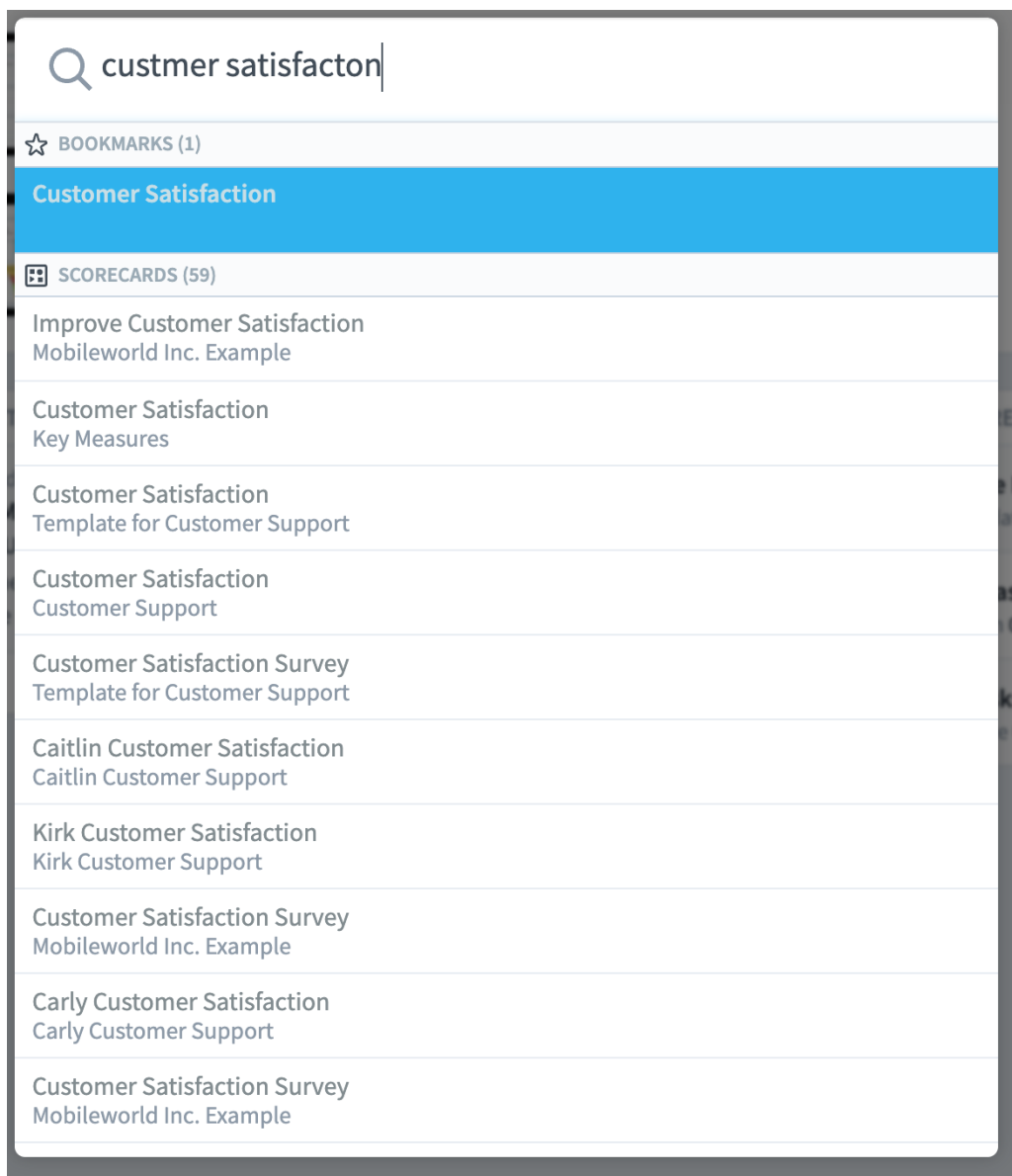
## Home, Files, Alerts & Search

### Search forgives typos and understands phrases

Search now works the way you expect a search box to:

- **Typos are forgiven.** Searching "custmer retention" finds Customer Retention.
- **Phrases are recognized.** Searching "customer retention" ranks "Improve Customer Retention" above items that merely contain one of those words.
- **Exact matches come first,** then names that start with what you typed, then close matches.

Search also looks inside datasets: type a field name, even with a typo, and the dataset containing it comes up.



## The newest file revision is at the top

A file's revision list now shows the newest revision first, so the one you almost always want is at the top instead of at the bottom of a long list.



### Spider Impact Logo

Sep 8, 2020 3:24:13 PM

Type Image (png)  
Size 89.78 KB  
Dimensions 900 x 900 px

**Download (89.78 KB)**



Drop a New Revision Here  
Or click to choose a file

#### REVISIONS

**impact-gradient-square-transparentback.png**

Sep 8, 2020 3:24:13 PM



**Logo.png**

Jun 19, 2019 2:43:38 PM



## URLs in broadcast alerts become links

Paste a URL into a broadcast alert and recipients now get a working link instead of plain text they have to copy into their browser.

## Apps

### Drilldowns stay inside the App

Apps are meant to be focused, standalone experiences, but a single click on a dashboard widget or a scorecard item used to open the full application in a new tab. Now, when the App has a place to show what you clicked, you go there inside the App, in the same tab. The full application opens only when the App has nowhere to show it.

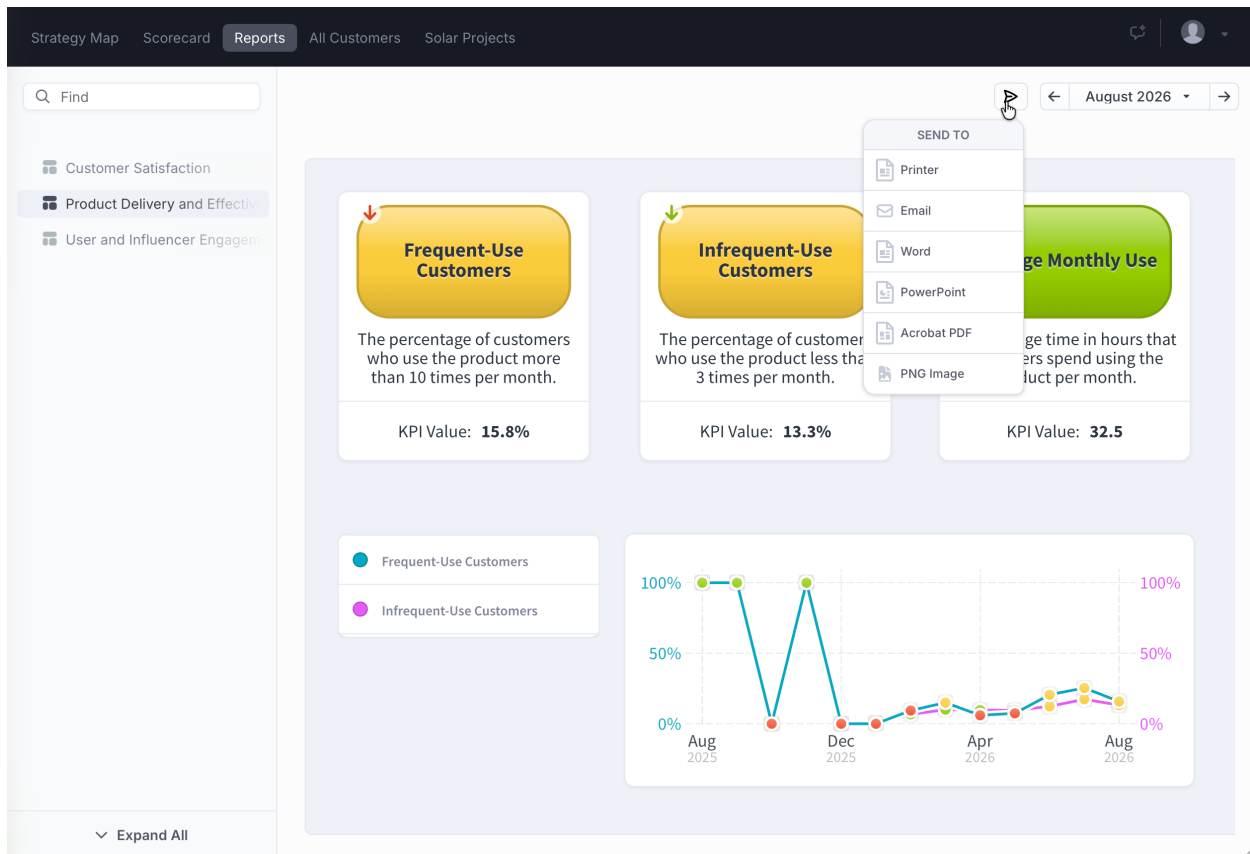
An App can show what you clicked if it has:

- a section for that specific item, or
- a section showing every item of that type for the item's organization — every dashboard for Sales, for example.

This works everywhere you can drill down in an App: dashboard widgets, scorecard items in reports, chart series, dataset and report drilldowns, and search results.

## Exporting from inside an App

The "Send To" button is now available inside Apps, so you can send a section to a printer, email, Word, PowerPoint, PDF, or PNG image. The other toolbar buttons stay hidden to keep Apps focused.

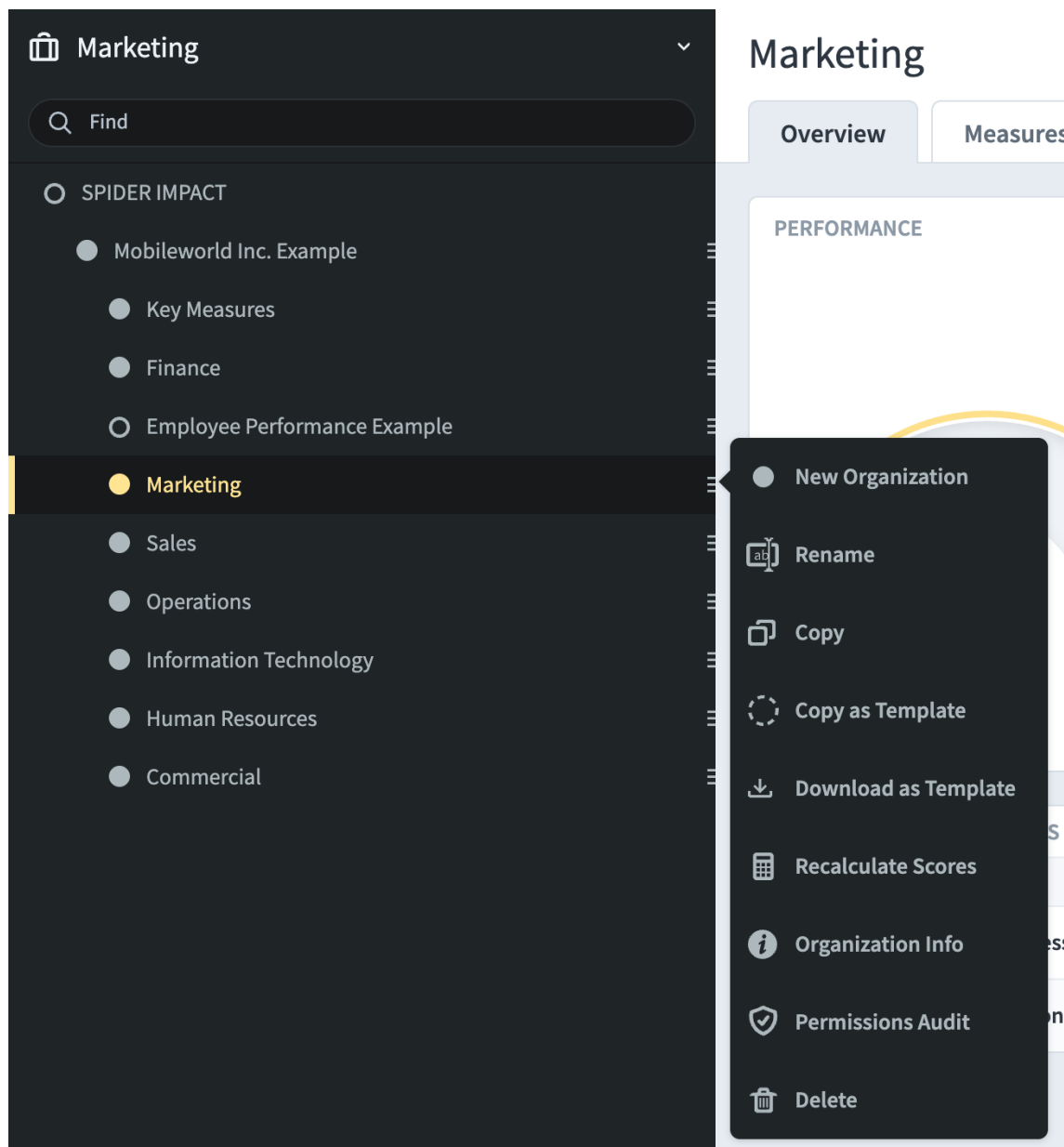


# Import & Export

## Organization template export and import

You can now export an entire organization from one Spider Impact installation and import it into another. Build in a test environment and deploy to production, share a working setup with another department, or keep a model organization you can copy again and again.

To export, put the organization tree in edit mode, click an organization, and choose "Download as Template".



Choose whether to include the organizations beneath it, and how much data to bring along: "KPI Values", "Initiative Values", "Threshold Values", "Notes", "Related Items", and "Dataset Records". Leave them all unchecked to export just the structure. Click "Download" to get a single ".orgtemplate" file.

### Export Organization: Example Organization

This will export this organization's scorecards, strategy maps, dashboards, reports, charts, datasets, forms, apps, files, initiatives, and briefings as a template file that can be imported into Spider Impact running this version or a newer one. Relationships and calculations between exported items are kept, but references to anything outside the export are removed.

Copy Option



Copy Only "Example Organization"



Copy "Example Organization" And Its Descendant Organizations

ALSO COPY

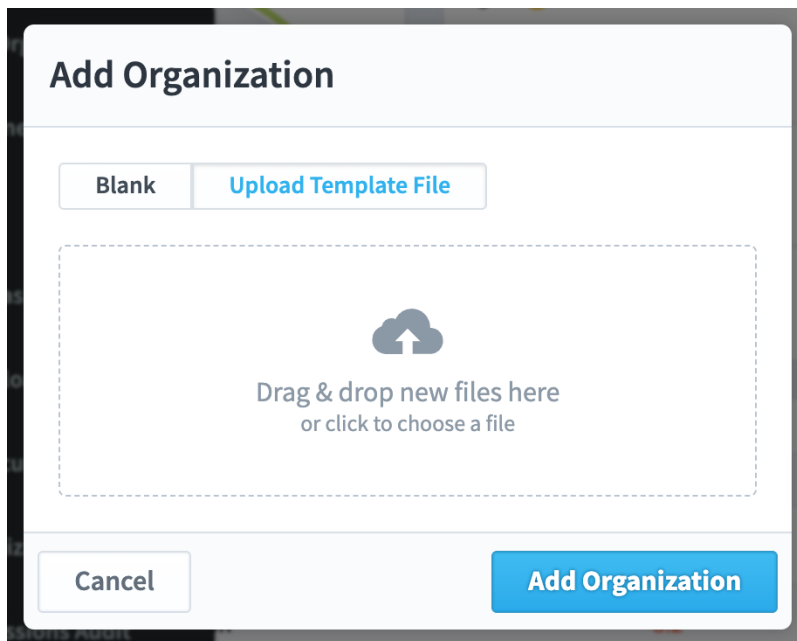
☐ KPI Values ☐ Initiative Values ☐ Threshold Values ☐ Notes ☐ Related Items ☐ Dataset Records

Cancel

Download

The template includes everything: scorecards, initiatives, dashboards, reports, charts, strategy maps, briefings, datasets, Apps, Forms, and the files they depend on, such as dashboard background images. When you include "Dataset Records", the files attached to those records come along too.

To import, put the organization tree in edit mode, create a new organization as usual, and choose "Upload Template File".



The new organization is built from the template, with all of its internal links pointing to the new copies. Scoring types aren't copied: each KPI uses the destination's scoring type of the same name, or "Goal/Red Flag" if there isn't one, and a KPI that pulls its values from a dataset outside the template becomes a manually entered KPI. Anything else that doesn't exist in the destination, such as a user or an item in another organization, is skipped.

You can import a template into the same version of Spider Impact or a newer one. If the destination can't take it, the import tells you which template versions it accepts.

## Importing spreadsheets from Microsoft 365

You can now import spreadsheets from SharePoint, OneDrive, and Teams on a schedule, just as you already can from FTP, Google Sheets, or an uploaded file. It works for every kind of spreadsheet import: KPI values, initiative status, scorecard and initiative structure, and datasets.

An administrator sets up a "Microsoft 365 Connection" once, using a "Tenant ID", a "Client ID", and a "Client Secret" or "Certificate" from an app registered in your Microsoft 365 account. Because the connection signs in as an application rather than a person, scheduled imports run with nobody logged in.

## Add Microsoft 365 Connection

For more information about setting up Microsoft 365 connections, see the [Importing Data from Microsoft 365](#) article in our online guide to using Spider Impact.

**Cloud Environment**

Commercial (standard Microsoft 365) ▼

**Tenant ID**

**Client ID**

**Authentication Type**

☒ Client Secret ☐ Certificate

**Client Secret**

1 — 2

After that, it's an ordinary import. Choose "Microsoft 365" as the data source.

## Choose KPI Value Data Source

**SPREADSHEET**

  
Upload A File

  
Spider Impact File

  
Google Sheets

  
Microsoft 365

  
(S)FTP

**DATABASE**

  
MySQL

  
Microsoft SQL Server

  
Oracle

  
DB2

  
SAP HANA

**OTHER**

  
Zapier

  
REST Web Service

  
Oracle NetSuite

Cancel

Back

✓ 2 3 4 5 6 7 8 9

Next

Pick the connection and paste the file's "Copy link" URL — the same link you'd send a colleague. It works with CSV and Excel files.

## Import KPI Values from a Spreadsheet

Choose the Microsoft 365 connection that should read the file, then paste the file's URL from SharePoint, OneDrive, or Teams (use Share, then Copy link). The URL must point to a CSV or Microsoft Excel file.

Choose Microsoft 365 Connection

[+ Add Microsoft 365 Connection](#)

Microsoft 365

File URL

https://spiderstrategies0.sharepoint.com/:x:/r/sites/spiderstrategies.com/Shared%20Documents/Gener

Cancel

Back

✓ ✓ 3 4 5 6 7 8 9

Next

From there it's like any other spreadsheet import: Spider Impact reads the file and shows you the data, and you map and schedule it as usual.

## Select Worksheet and Header Rows

Many spreadsheets have header data that you don't want to import in the first few rows, for example column labels or a spreadsheet title. If one of these rows contains your column labels, be sure to flip the switch on that row. You can also use the Ignore checkboxes to hide irrelevant data.

Worksheet \*

0: KPIs

EXAMPLE DATA FROM THE SPREADSHEET

| COLUMN LABELS                       | IGNORE                   | A                         | B            | C            | D            | E            | F            | G            |
|-------------------------------------|--------------------------|---------------------------|--------------|--------------|--------------|--------------|--------------|--------------|
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | KPI                       | Jan 31, 2026 | Feb 28, 2026 | Mar 31, 2026 | Apr 30, 2026 | May 31, 2026 | Jun 30, 2026 |
| <input type="checkbox"/>            | <input type="checkbox"/> | Monthly Revenue           | 1,250,000    | 1,310,000    | 1,395,000    | 1,442,000    | 1,503,000    | 1,571,000    |
| <input type="checkbox"/>            | <input type="checkbox"/> | New Customers             | 45           | 52           | 61           | 58           | 67           | 73           |
| <input type="checkbox"/>            | <input type="checkbox"/> | Customer Satisfaction     | 87           | 89           | 91           | 90           | 92           | 93           |
| <input type="checkbox"/>            | <input type="checkbox"/> | Support Tickets Closed    | 320          | 298          | 345          | 360          | 372          | 355          |
| <input type="checkbox"/>            | <input type="checkbox"/> | Avg Response Time (hours) | 4.2          | 3.8          | 3.5          | 3.1          | 2.9          | 2.7          |
| <input type="checkbox"/>            | <input type="checkbox"/> | Employee Engagement       | 78           | 79           | 81           | 83           | 82           | 85           |

Cancel

Back

✓ ✓ ✓ 4 5 6 7 8 9

Next

One connection covers SharePoint, OneDrive, and Teams alike, since Teams stores its files in SharePoint and OneDrive.

Government customers are covered too: the connection's "Cloud environment" setting offers "Commercial (standard Microsoft 365)", "GCC High (US Government)", and "DoD (US Department of Defense)". On-premises SharePoint Server isn't supported.

The setup on the Microsoft side, including the choice between the least-privilege "Sites.Selected" permission and "Files.Read.All", is covered step by step in the [Importing Data from Microsoft 365](#) article in our online guide.

## Pagination in REST imports

Many APIs return long results a page at a time, and a REST import used to stop after the first page. REST connections now have a "Pagination" setting that follows the pages for you, supporting the three patterns almost every API uses:

- "Offset/Limit" — each request asks for the next batch by position. You name the parameters your API uses, such as "offset" and "limit" or "skip" and "take". If your API counts from 1 instead of 0, set the "Starting Offset Value".
- "Cursor" — each response includes a token for the next page, and you tell Spider Impact where to find it.
- "Page Number" — each request asks for the next page number.

You also set a "Page Size" and a "Maximum Pages" limit, so an import can never run away. Existing imports behave exactly as before until you turn pagination on.

## Configure Pagination

Pagination allows you to retrieve data from APIs that return results across multiple pages. Choose the pagination type that matches your API's documentation.

**Pagination Type**

Offset/Limit - Uses offset and limit parameters

**Offset Parameter Name \***

offset

**Limit Parameter Name \***

limit

**Starting Offset Value \***

0

**Page Size \***

50

**Maximum Pages \***

20

Cancel Done

## Rolling date ranges in REST imports

Many APIs ask for a date range, and until now you had to type it into the connection and keep updating it by hand. Now you can put "[today]" anywhere in a REST import's URL, headers, or body, and it's replaced with the current date each time the import runs:

- "[today]" is the current date, like "2026-08-03"
- "[today-30]" and "[today+7]" shift it by days, so "from=[today-30]&to=[today]" always means the last thirty days
- "[today:yyyyMMdd]" formats the date however your API expects

- they combine, so "[today-30:yyyyMMdd]" is thirty days ago in compact form

An import that asks for the last thirty days keeps doing so, without anyone touching it.

#### URL Parameters

| Key  | Value      |                                                                                                                                                                         |
|------|------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| from | [today-30] |   |
| to   | [today]    |   |

## More date formats are understood on import

Spider Impact now understands several more common date formats on import, so fewer imports need a transformation or fail outright:

- "2023-01-01T10:30:00.000+0000", the format Jira uses
- compact dates and times such as "20220801" and "20220801T143000Z"
- email-style dates such as "Tue, 24 Oct 2023 00:00:01 +0000"
- Unix timestamps such as "1673789160"

## An API for nearly the whole application

Spider Impact's API used to cover only organizations and scorecard items. It now covers nearly the whole application — datasets, scorecards, initiatives, Forms, dashboards, charts, reports, imports, exports, files, Apps, alerts, and administration — with more than 470 operations in all.

Requests use a token you create under "Administration" › "API Access". A token has your permissions, so it can see and change exactly what you can, and nothing more.

The API also documents itself, for both people and AI tools.

## For people

The "API Access" page links to the "interactive API documentation", an API explorer built into your installation at `/api-docs`.

The screenshot shows the Spider Impact Administration interface. The left sidebar contains a navigation menu with sections: PERSONAL (Home, Bookmarks), PRESENTATION (Briefings, Strategy Maps, Dashboards, Reports, Charts), FOUNDATION (Scorecards, Initiatives, Datasets, Forms, Files), and API Access. The main content area is titled 'Administration' and has a sub-section 'API Access'. A purple arrow points from the 'API Access' menu item in the sidebar to the 'API Access' section in the main content area.

API tokens and MCP connections let other applications access Spider Impact on your behalf, with your permissions. Learn more in the [interactive API documentation](#).

To use your Spider Impact data in AI assistants like ChatGPT, Claude, or Microsoft 365 Copilot, add Spider Impact in the assistant using the MCP server URL `http://localhost:8100/impact/api/v1/mcp` and then log in to Spider Impact to approve access. The assistant gets read-only access to the items you can view.

MCP CONNECTIONS FROM CHATGPT, CLAUDE, ETC.

| ASSISTANT             | USER           | CONNECTED    | LAST USED    | ACTIONS |
|-----------------------|----------------|--------------|--------------|---------|
| Claude Code           | Full User      | Oct 27, 2026 | Oct 27, 2026 |         |
| Microsoft 365 Copilot | Full User      | Oct 27, 2026 | Oct 27, 2026 |         |
| Claude                | Marsha Mello   | Oct 27, 2026 | Oct 27, 2026 |         |
| Claude                | Dana Whitfield | Oct 27, 2026 | Oct 27, 2026 |         |
| ChatGPT               | Priya Shah     | Oct 27, 2026 | Oct 27, 2026 |         |

API TOKENS + Create API Token

| NAME                        | CREATED BY                  | CREATED      | ACTIONS |
|-----------------------------|-----------------------------|--------------|---------|
| Nightly data warehouse sync | Spider Impact Administrator | Oct 27, 2026 |         |
| Power BI refresh            | Spider Impact Administrator | Oct 27, 2026 |         |

The explorer lists every endpoint, grouped by the part of the product it belongs to.

# Spider Impact REST API

2.0.0OAS 3.1[./spec.json](#)

## Authentication

All API requests require Bearer token authentication. Get your token from [Administration > API Tokens](#).

Include your token in the Authorization header:

**Authorization: Bearer YOUR\_API\_TOKEN**

## Try It Out

1. Click **Authorize** above and paste your API token
2. Expand any endpoint and click **Try it out**
3. Fill in parameters and click **Execute**

Servers

/impact - Current server

Authorize



**Apps** Custom application management



**Audit History** Retrieve audit history for domain objects



**Authentication** User login and session management



**Bookmarks** User bookmarks and folders



**Briefings** Briefing books and presentations



**Charts** Chart designer and visualization management



**Chat** AI-powered chat and conversational analytics



**Dashboards** Dashboard and strategy map management



**Dataset Key Sets** Dataset rollup tree key set management



**Dataset Trees** Dataset rollup tree management



**Datasets** Dataset management and data retrieval



**Documents** Managed documents and file revisions



Open any endpoint to see its parameters, an example response, and the errors it can return. Paste your token into "Authorize" and you can try real requests against your own data right in the browser, without writing any code.

GET

/api/files/{documentId}



Parameters

Try it out

| Name                                      | Description                             |
|-------------------------------------------|-----------------------------------------|
| <b>documentId</b> <span>★ required</span> |                                         |
| integer(\$int32)<br>(path)                | <input type="text" value="documentId"/> |
| relatedItems                              | <input type="text" value=""/>           |
| boolean<br>(query)                        |                                         |
| grandchildren                             | <input type="text" value=""/>           |
| boolean<br>(query)                        |                                         |
| datasets                                  | Default value : false                   |
| boolean<br>(query)                        | <input type="text" value="false"/>      |
| imports                                   | Default value : false                   |
| boolean<br>(query)                        | <input type="text" value="false"/>      |

Responses

| Code | Description                                                                                                                                                                                                                                                                                                                                                     | Links    |
|------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------|
| 200  | Success                                                                                                                                                                                                                                                                                                                                                         | No links |
|      | <div>Media type</div> <div><input type="text" value="*/"/></div> <div>Controls Accept header.</div> <div>Example Value   Schema</div> <div><pre>{   "id": 1073741824,   "label": "string",   "parentId": 1073741824,   "depth": 1073741824,   "syncId": 1073741824,   "organizationId": 1073741824,   "revisions": [     {       "id": 1073741824, </pre></div> |          |

  || 401 | Authentication required | No links |
| 403 | Insufficient permissions | No links |
| 404 | Document not found | No links |
| 500 | Internal server error | No links |

## ***For machines***

Behind the explorer is a single file describing the entire API in the standard OpenAPI format, at `"/api-docs/spec.json"`. Give that URL to an AI agent or code generator and it has everything it needs to use the API correctly. Reading the file doesn't require a login, but the API itself still requires a token. To use Spider Impact from ChatGPT, Claude, or Copilot, you don't need a token at all; see [Connect ChatGPT, Claude, and Microsoft 365 Copilot to Spider Impact](#).

## **Spreadsheet imports survive rearranged sheets**

Dataset imports now find their worksheet by name rather than by position, whether the workbook comes from Google Sheets, Microsoft 365, FTP, or the "Files" page, so you can add, remove, or reorder sheets without breaking the import. If the worksheet is renamed, the error tells you exactly what happened and what to do:

*We couldn't find a worksheet named "Sales" in your spreadsheet.*

*The available worksheets are: Revenue, Costs. Use Edit Data*

*Source to pick a different worksheet.*

## **CSV exports of rollup fields can be re-imported**

CSV exports now write each rollup field's key instead of its display name, so an exported file imports back into Spider Impact cleanly.

## **Scheduled imports run at most every 30 minutes**

Scheduled imports can now run at most every 30 minutes, on both hosted and self-hosted installations, since imports that ran every minute put a heavy load on the server. You can still run an import by hand whenever you need fresher data.

**Import Schedule**

CHOOSE A TIME TO SCHEDULE

☒ Schedule Import

Every X Number of Minutes Minutes

30 30 ✓ 45

Cancel Save

## Security

### One permission can cover thousands of record owners

Some datasets are owned one record at a time: a thousand people each complete their own audit, or an import assigns each task to the person named on it. Limiting everyone to their own records used to mean adding and maintaining a separate permission for each person.

A new permission type, "User ID Field", does it in one step. Add it once, choose the field that holds a user's ID, and every signed-in user can reach exactly the records that name them. When an overnight import creates new records, the people named in them have access as soon as they log in.

PERMISSIONS

☒ Advanced Permissions

By User or Group

By Permission Filter

Advanced permissions mean only people who have explicitly defined permissions can view this dataset. The [Dataset Permissions Audit](#) shows an expanded view of these permissions.

Add User, Group, or Rollup Tree Group...

Spider Impact Administrator

User ID Field

Auditor User ID

You can add it more than once on a dataset, once for each field that names an owner, such as an auditor and a reviewer. It can grant viewing and modifying records, but not administering the dataset.

Users can't claim records that aren't theirs: someone whose only access comes from a "User ID Field" permission can't create a record that names someone else, or reassign one of their records to another person.

## Report totals respect every View Records filter

View Records filters control which records each user can see. Reports and dataset grids now apply those filters to linked datasets as well, so a total drawn from a linked dataset includes only the records the user is allowed to see — matching what forms already did.

For users with restrictive filters, some linked totals in reports and grids will be smaller after upgrading, and some may be blank. The new numbers are the correct ones.

## View Only users can keep bookmarks

A single permission used to cover bookmarks and display settings, alert subscriptions, and sending broadcast alerts. Because it included broadcast alerts, View Only users couldn't have it, so they couldn't bookmark anything either.

It's now three separate permissions:

- "Modify Bookmarks and Remember Display Settings"
- "Modify Alert Subscriptions and Settings"
- "Send Broadcast Alert"

View Only users can now be given the first, so they can bookmark the screens they use and keep their display settings.

European Corporate Sales: Actions
[Select default](#)
[Unselect all](#)

Members of this group will be able to perform the actions you choose below. Actions with an asterisk (\*) only apply to organizations that the group can view.

Users whose access is limited to View Only have additional restrictions regardless of the permissions selected below:

- They cannot use Send To to export, print, or email content.
- They cannot subscribe to alerts or be added to alert subscriptions.
- They cannot be selected as owners, updaters, or initiative assignees.
- They cannot access the Data Import & Export section in Administration.

|                                                                                          |                                     |
|------------------------------------------------------------------------------------------|-------------------------------------|
|  VIEW | <input type="checkbox"/>            |
| View All Organizations                                                                   | <input type="checkbox"/>            |
| Modify Bookmarks and Remember Display Settings                                           | <input checked="" type="checkbox"/> |
| Change Personal Profile                                                                  | <input checked="" type="checkbox"/> |

Cancel

Done

## A great deal more is audited

Audit history answers the question every regulated organization asks: who changed this, and what did it look like before? Version 5.9 records far more of those changes, in far more detail.

### *KPI approvals and rejections*

Approvals and rejections of KPI values are now audited, including who acted, who proposed the value, at which approval level, and which period it was for.

## Telesales Calls Completed History

You can choose to either see all events, or only the notes and Measure updates for the current period.

| EVENTS       |                                                                                                               | August 2026 Values & Notes                                     | All Events | Send To                       |
|--------------|---------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------|------------|-------------------------------|
| DATE         | USER                                                                                                          | ACTION                                                         |            | DESCRIPTION                   |
| Oct 31, 2025 |  Removed User                | Changed Measure Value                                          |            | to <b>195</b> for August 2026 |
| Sep 1, 2026  |  Marsha Mello                | Approved Proposed Measure Value from Dana Whitfield at Level 1 |            | for August 2026               |
| Sep 22, 2026 |  Spider Impact Administrator | Rejected Proposed Measure Value from Dana Whitfield at Level 2 |            | for August 2026               |

Close

### *Where a KPI value came from*

Audit history now records how each KPI value arrived — "Manual Entry", "Dataset Series", "Replication", "AI Connection", or the import or API call that brought it in — so you can trace an unexpected value to its source.

## Client Meetings History

You can choose to either see all events, or only the notes and Measure updates for the current period.

| EVENTS       |                                                                                                                 | August 2026 Values & Notes | All Events | Send To                                                    |
|--------------|-----------------------------------------------------------------------------------------------------------------|----------------------------|------------|------------------------------------------------------------|
| DATE         | USER                                                                                                            | ACTION                     |            | DESCRIPTION                                                |
| Oct 31, 2025 |  Removed User                | Changed Measure Value      |            | to <b>11</b> for August 2026                               |
| Sep 22, 2026 |  Spider Impact Administrator | Changed Measure Value      |            | from <b>11</b> to <b>64 (Manual Entry)</b> for August 2026 |

Close

### *What a note used to say*

When a scorecard item's or initiative's note is edited, audit history now shows the old and new wording side by side, so you can see exactly what changed.

## Total Revenue History

You can choose to either see all events, or only the notes and Measure updates for the current period.

| EVENTS      |                                                                                                               | August 2026 Values & Notes     | All Events                                                                                                                                                                                                                                                                                                                                 | Send To |
|-------------|---------------------------------------------------------------------------------------------------------------|--------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------|
| DATE        | USER                                                                                                          | ACTION                         | DESCRIPTION                                                                                                                                                                                                                                                                                                                                |         |
| Sep 1, 2026 |  Spider Impact Administrator | Added a Note for August 2026   | to Revenue came in slightly under target this month. The Q3 enterprise renewals slipped into September, so we expect this to recover next period.                                                                                                                                                                                          |         |
| Sep 1, 2026 |  Spider Impact Administrator | Changed a Note for August 2026 | from Revenue came in slightly under target this month. The Q3 enterprise renewals slipped into September, so we expect this to recover next period. to Revenue came in under target this month. Two Q3 enterprise renewals slipped into September. Finance has confirmed both have since closed, so we expect this to recover next period. |         |

Close

## Groups and permissions

These changes to groups are now recorded:

- members and administrators added or removed
- permissions granted or removed
- changes to which organizations the group can reach
- renaming
- group type changes, such as "View Only → Local Administrators"

## Dataset rollup trees

"Dataset Rollup Trees" in Administration now has a "History" button showing what changed and when, including changes to rollup tree groups, which control who sees which part of a dataset.

## Rollup Tree History

| EVENTS       |                                                                                                                 | Send To         |             |
|--------------|-----------------------------------------------------------------------------------------------------------------|-----------------|-------------|
| DATE         | USER                                                                                                            | ACTION          | DESCRIPTION |
| Sep 22, 2026 |  Spider Impact Administrator | Added Tree Node | Total       |

Close

## *Application configuration, scoring types, and outbound email*

Changes to Application Administration settings are recorded field by field, with sensitive values like keys and certificates masked. Changes to scoring types are audited, and outbound emails are recorded with their subject and recipients.

## The User Permissions Audit no longer freezes the browser

The User Permissions Audit now opens smoothly even for users with a great many permissions. For those users, it used to run for a long time and then crash the browser.

This User Permissions Audit lists everything that a specific user can see and do throughout the software. Advanced dataset permissions are listed separately because standard dataset permissions are already covered in Viewable Organizations.

USER

Marsha Mello

| ORGANIZATION PERMISSIONS |                                                                                                                             |                                                 |
|--------------------------|-----------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------|
| ORGANIZATIONS            | PERMISSION SOURCE                                                                                                           | ACTIONS                                         |
| All Organizations        |  <a href="#">Finance Team</a>              | View All Organizations, Change Personal Profile |
| All Organizations        |  <a href="#">Marketing Team</a>          | View All Organizations, Change Personal Profile |
| All Organizations        |  <a href="#">Project Management Team</a> | View All Organizations, Change Personal Profile |

## Admin

### Finding and quarantining stale organizations

Large installations collect organizations nobody uses anymore, and figuring out which ones are truly unused is hard: activity is spread across history, KPI values, and edits of every kind, and an organization that looks untouched may still feed a live dashboard.

"Stale Organization Quarantine", under "Advanced" in Administration, does that work for you. Choose a "Not modified since" date and a "Quarantine Organization" to hold the results, then click "Scan". Spider Impact lists the organizations with no activity since that date, along with how many organizations sit beneath each one. Review the list and move the ones you agree with into quarantine.

Nothing is deleted, and every move can be undone. A good rhythm is to quarantine, wait a month, and then delete the quarantine organization if nobody has objected.

The tool won't automatically move an organization when doing so could cause problems — one involved in replication, templates, or copies, for example, or a top-level organization. It tells you why, and you can still move it yourself.

Find organizations that have not been modified since a chosen date and move them under a quarantine organization to set them aside for later review. Every move is reversible, so you can restore an organization to its original place at any time.

QUARANTINE ORGANIZATION

Quarantine

NOT MODIFIED SINCE

09/01/2026

Scan

| ACTIONS         | ORGANIZATION                           | DESCENDANT ORGANIZATIONS | SCORECARD ITEMS | INITIATIVE ITEMS | DASHBOARDS | STRATEGY MAPS | CHARTS | REPORTS | BRIEFINGS | DATASETS | FILES | FORMS | APPS | LAST MODIFIED ON |
|-----------------|----------------------------------------|--------------------------|-----------------|------------------|------------|---------------|--------|---------|-----------|----------|-------|-------|------|------------------|
| <div>Move</div> | <a href="#">US</a>                     | 6                        | 98              | 0                | 28         | 0             | 0      | 14      | 0         | 0        | 0     | 0     | 0    | Oct 31, 2025     |
| <div>Move</div> | <a href="#">Additional Examples</a>    | 5                        | 55              | 1                | 2          | 0             | 0      | 6       | 1         | 0        | 0     | 0     | 0    | Oct 31, 2025     |
| <div>Move</div> | <a href="#">Operations</a>             | 0                        | 28              | 0                | 3          | 0             | 0      | 0       | 0         | 0        | 0     | 0     | 0    | Oct 31, 2025     |
| <div>Move</div> | <a href="#">Carly Customer Support</a> | 0                        | 16              | 3                | 5          | 0             | 0      | 3       | 0         | 0        | 0     | 0     | 0    | Oct 31, 2025     |
| <div>Move</div> | <a href="#">Kyle Customer Support</a>  | 0                        | 16              | 7                | 7          | 0             | 0      | 3       | 0         | 0        | 0     | 0     | 0    | Oct 31, 2025     |
| <div>Move</div> | <a href="#">Cathy Customer Support</a> | 0                        | 16              | 0                | 5          | 0             | 0      | 3       | 0         | 0        | 0     | 0     | 0    | Oct 31, 2025     |

## The version number is easier to find

The "General" panel of Application Administration now shows which version of Spider Impact you're running, so application administrators no longer need server administrator access to find it.

## Under the hood

### A much more accessible application

Spider Impact's Lighthouse accessibility score has risen from 64 to 95 across every page we audited — an important step for the many public-sector customers who need Section 508 compliance. Buttons and form controls throughout the application now have proper labels for screen readers, and decorative icons are no longer read aloud.

## Emoji import correctly

Data from tools like GitHub, Jira, and Zendesk often includes emoji, which used to be lost or make the import fail. Datasets now store the full range of Unicode characters, emoji included.

## Duplicate record IDs are impossible, not just unlikely

Spider Impact has always checked that each Record ID in a dataset is unique. The database now enforces that rule too, so a duplicate can't slip in by any route, and any problem is caught immediately rather than the next time the dataset rebuilds.

## Easier form troubleshooting

When a form doesn't behave as expected, the browser console now shows much more of what it's doing. Along with each action, it logs every time a variable is set, including defaults when the form opens, and every condition it evaluates, with whether it came out true or false.

## Quieter, more useful logs

Two sources of log noise are gone. Wide datasets no longer fill the log with harmless indexing errors every time they rebuild. And an installation missing its email settings no longer runs a CPU at full load retrying alerts.