KEYSTONE® web

Scalable. Streamlined. Simple.

User Guide

BEST

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1 Keystone Web—Getting Started

**THANK YOU FOR PURCHASING KEYSTONE WEB.
SCALABLE, STREAMLINED, SIMPLE, KEY MANAGEMENT.**

This User Guide provides step-by-step procedures for using the Keystone Web software.

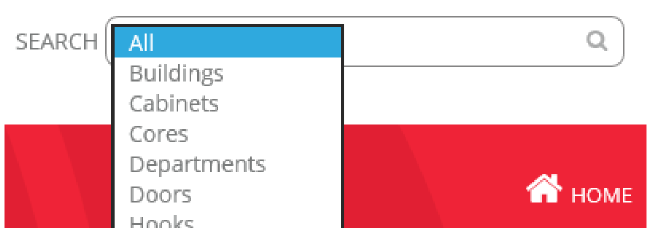
Getting Started: Searches and Primary Commands

This chapter describes the following commands:

- Global Search
- Sort and Filter
- Edit
- Delete
- Purge
- Details
- Tool Tips

Global Search

The Global Search will find any record in the database. Users can restrict the search to screens of specific records using the refinement drop-down menu at the left end of the search entry field or leave the refinement set to All, which is the default. Three characters are required for the search process to begin. As with any search, the more detail provided the better the search performs.



Step 1:
Enter information in the Global Search field. A drop-down list opens just beneath the search field, showing the results.

Step 2:
Select the record you seek from the list.

Step 3:
The Global Search results screen loads, showing the record selected from the results list. The record is presented with three columns:

Feature - The screen or area of Keystone Web where the record is located.

Feature Value - The particular detail of the record. In certain cases it will show data in greater detail than the drop-down list (for example, a serial number for a key in addition to the keymark).

Search Result - The result of the search as shown on the drop-down list. This result is also a hyperlink to the actual record (see step 4).

Note: The Global Search results screen will often provide only one result, but its purpose is to accommodate scenarios where the search result from the drop-down list would actually yield multiple records. For example, if the database has three records of John Smith, all three records will appear on the Global Search results screen.

Step 4:
Select the hyperlink in the right hand column from the search result field to open the desired record found in the Global Search.

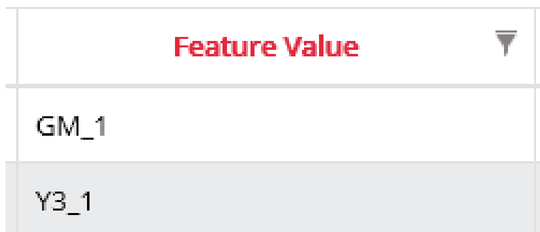
Sort and Filter

Screens in Keystone Web contain lists of records, with column headings relevant to each screen. To assist in the search process at the screen level, the column headings feature sort and filter capabilities.

Sort

Step 1:
Select a column heading label: **Feature Value** in this example. Data will sort by this column in smallest to largest order, or A to Z.

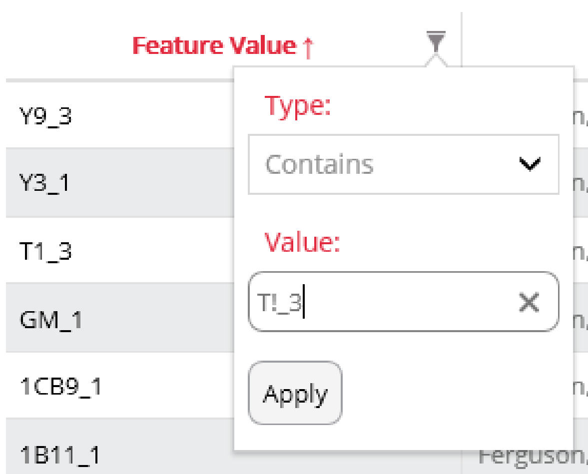
Step 2:
Select the same column a second time. Data will sort by this column in largest to smallest order, or Z to A.



Filter

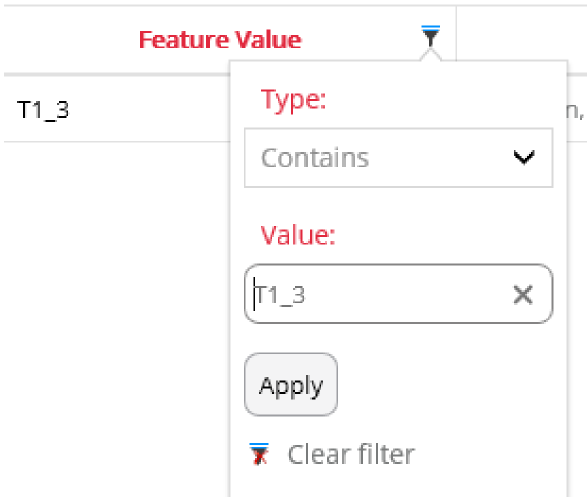
Step 1:
In any column heading, select the **Filter** icon.

Step 2:
Enter the search criteria in the value field and select the desired filter type (Contains, Equals, Starts With, Ends With). Note that Contains is the default filter type.



Step 3:
Select **Apply** to apply the filter based on your criteria.

Step 4:
To clear the filter, choose the same filter icon and select **Clear filter**.

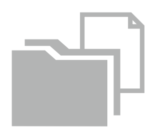


Action Icons

The following icons are found in the Action column of many of the tables and are used to modify or view the records of its row.

Edit

The edit command is indicated by the following icon. Edit allows the user to modify the primary information about a record.



Delete

The delete command is indicated by the following icon. Note that delete in Keystone Web moves a record to a deleted list. Although the deleted records do not appear in the active list for their category, they are still present in the database.

Purge

The purge command is indicated by the following icon. Note that purge in Keystone Web completely removes the record from the database. Warnings appear on the screen to alert the user when purge is selected.

Details

The details command is indicated by the following icon. Details allow the user to cross reference, perform transactions, make additions, and many other activities that individual records may require.

Tool Tips

The actionable buttons in Keystone Web feature tool tips that indicate the name and/or use of the button. The tool tips are visible by hovering over the button with the pointer.

2 Masterkey

Masterkey

This chapter describes the following actions:

Import Codes:

- New Systems
- System Extensions

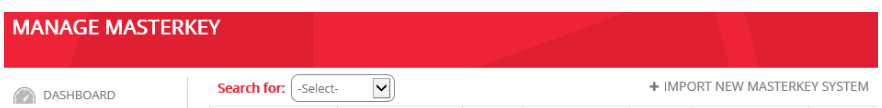
Manually Enter Codes:

- Start a New System
- Building the Hierarchy
- Adding Operating Codes
- Adding Selectivity

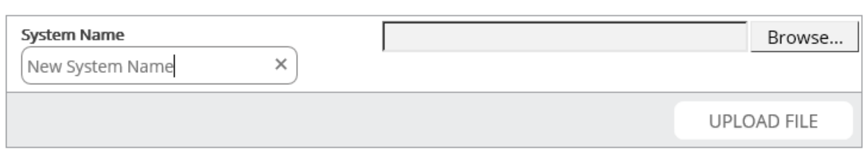
Import Codes: New Systems

Step 1:
From left menu bar or from the dashboard, select **Masterkey**.

Step 2:
Select **Import New Masterkey System** from the top of the Manage Masterkey screen.



Step 3:
Enter a system name that helps you identify the new masterkey system.



Step 4:
Select **Choose Files** or **Browse** (depending on web browser in use), in the Masterkey Import screen and navigate to where the 'import' file received from Keystone Web Support was saved and select it.

Step 5:
Select **Upload File**.

Step 6:
The confirmation message "Data processed successfully" appears.

Step 7:
Return to **Manage Masterkey screen**. The newly entered system is the first row in the table.

System	System Type	Pins	Keyway	Mark	Keystamp	Actions
UG Imported	A2	7	A	S		

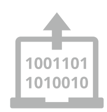
Import Codes: System Extensions

Step 1:
From left menu bar or from the dashboard, select **Masterkey**.

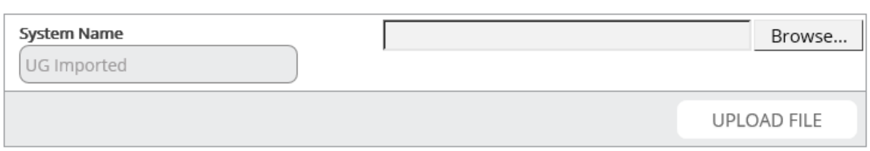
Step 2:
Find the masterkey system in the systems column to which the new code extensions will be appended.

System	System Type	Pins	Keyway	Mark	Keystamp	Actions
UG Imported	A2	7	A	S		

Step 3:
Select the **Append new codes** icon from the Actions column.

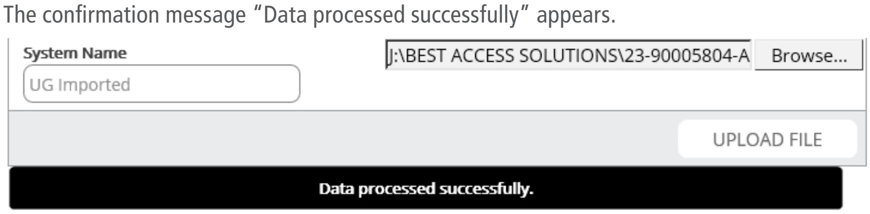


Step 4:
Select **Choose Files** or **Browse** (depending on web browser in use), in the Masterkey Import screen and navigate to where the 'import file' received from Keystone Web Support was saved.



Step 5:
Select **Upload File.**

Step 6:
The confirmation message "Data processed successfully" appears.



Step 7:
Return to the **Manage Masterkey** screen. The existing system with the newly appended codes is now the first row in the table.

Manually Enter Codes: Start a New System

Step 1:
From left menu bar or from the dashboard, select **Masterkey**.

Step 2:
Select **Add Masterkey System** from the top of the screen.

Step 3:
Complete the following fields in the New System window (* indicates a required field):

System*: Enter a name that helps you identify the new masterkey system.

System Type*: Found in the code records supplied by BEST Access Solutions: A2, A3, or A4. (See Appendix A for example code records.)

Pins*: Also called Pin Size. Found in the code records supplied by BEST Access Solutions.

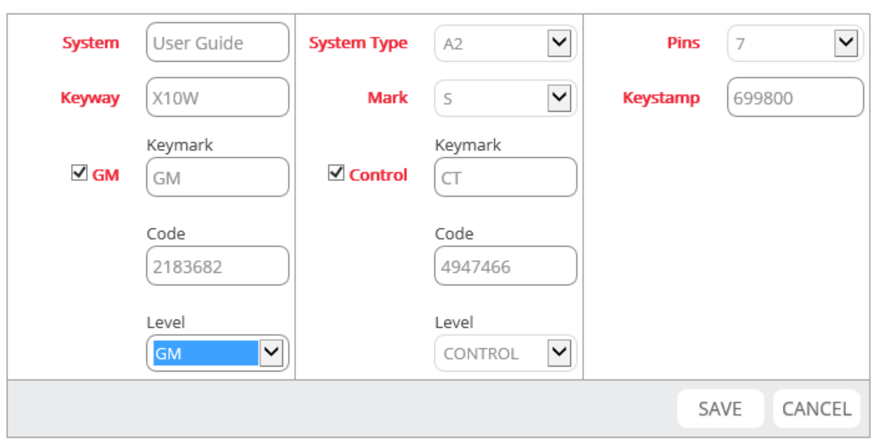
Keyway*: Found in the code records supplied by BEST Access Solutions.

Mark*: Also called mark on or mark on value. Found in the code records supplied by BEST Access Solutions. Select “S” if mark is side or “F” if mark is face.

Keystamp: Found in the code records supplied by BEST Access Solutions.

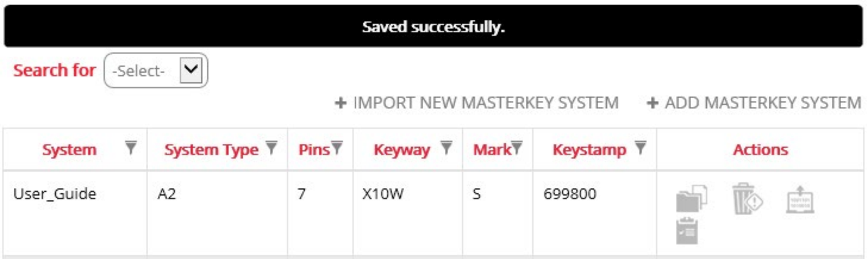
GM and Code*: Enter the Grandmaster marking name in the Keymark field and the Grandmaster code as found in the code records supplied by BEST Access Solutions.

Control and Code*: Enter the Control marking in the Keymark field name and the Control code as found in the code records supplied by BEST Access Solutions.



Step 4:
Select **Save** to complete the initial setup.

Step 5:
You will be returned to the Manage Masterkey screen where the confirmation message “Saved successfully” appears and the new system is now the first row in the table.



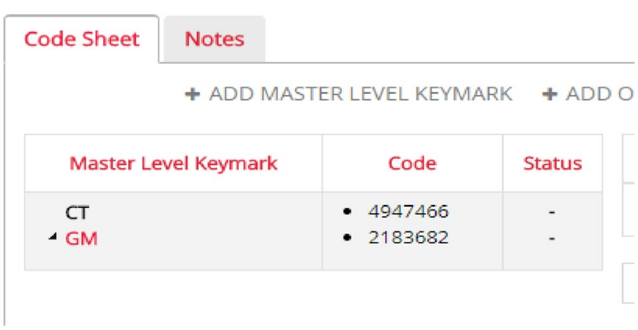
Manually Enter Codes: Building the Hierarchy

Step 1:
If you are not already at the Manage Masterkey screen, select **Masterkey** from the left menu bar or from the dashboard.

Step 2:
Find the previously created new masterkey system in the system column (It should be the first row) and highlight it.

Step 3:
Select the **Details of this system** icon from the **Actions** column.

Step 4:
The Control (CT) and Grandmaster (GM) keys established in the initial setup appear in the left column, called the hierarchy list. Highlight **Grandmaster** in the Master Level Keymark column by clicking on it. It will turn red and then select **Add Master Level Keymark**.

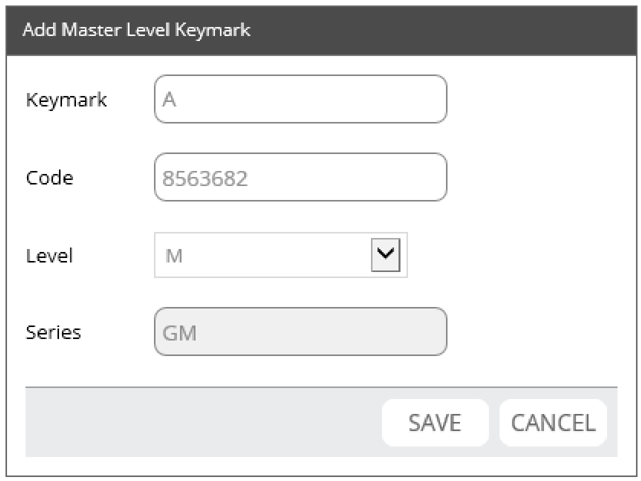


Step 5:
In the Add Master Level Keymark window, complete the following fields:

Keymark: This is the name of the master you are adding. Note that only the unique portion of the master name is required. For example, if the code records show "Master A" or "M'A," only "A" is required for entry in the Keymark field. Keystone Web will automatically prefix hierarchy levels for masters, submasters, etc.

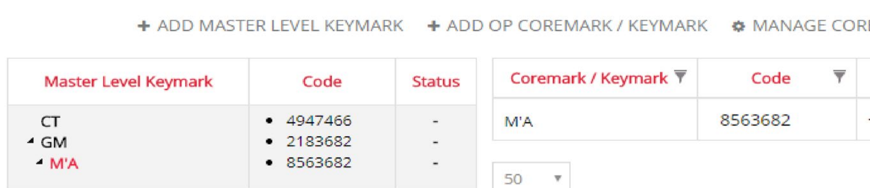
Code: This is the numeric string of key cuts for the master you are adding, as found in the code records supplied by BEST Access Solutions.

Note: Level and Series are completed automatically by Keystone Web.



Step 6:
The newly added master key (M'A) now appears under the grandmaster (GM) in the left hierarchy list and in the right table.

To add a submaster, highlight the parent master by clicking on it. The master that the submaster belongs under is the parent master (M'A in this example). It will turn red and then select **Add Master Level Keymark**.



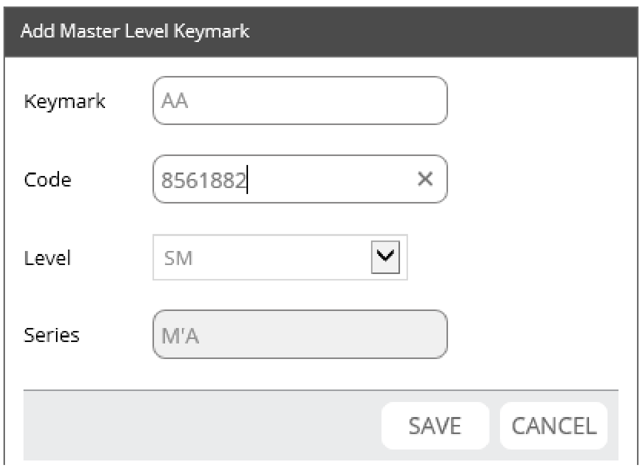
Step 7:
In the Add Master Level Keymark window, complete the following fields:

Keymark: This is the name of the submaster you are adding. Note that only the unique portion of the submaster name is required. For example, if the code records show "Submaster AA" or "SM'AA," only "AA" is required for entry in the Keymark field. Keystone Web will automatically prefix hierarchy levels for masters, submasters, etc.

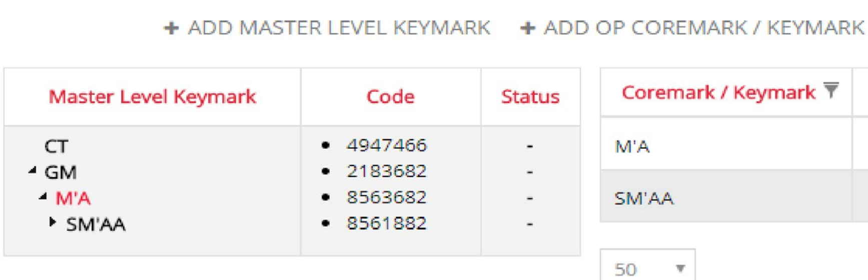
Code: This is the numeric string of key cuts for the master you are adding, as found in the code records supplied by BEST Access Solutions.

Note: Portions of the code will already be completed by Keystone Web based on the submasters association with the parent master. Complete the remaining key cuts of the code that are represented by dashes in the Code field.

Note: Level (submaster) and **Series** (parent master) are completed automatically by Keystone Web.



Step 8:
Select **Save**. The newly added submaster (SM'AA) now appears under the desired master in the left hierarchy list and in the right table.



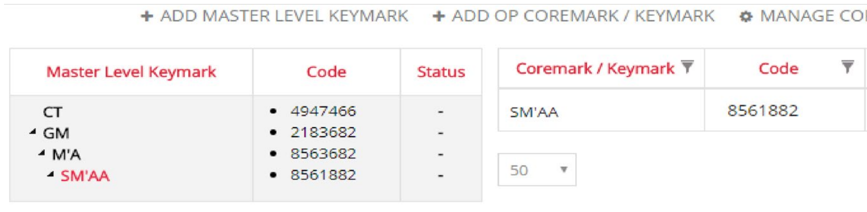
Manually Enter Codes: Adding Operating Codes

Step 1:
If you are not already at the Masterkey Details screen, select **MasterKey** from the left menu bar or from the dashboard and find the desired system.

Highlight the row and select the **Details of this system** icon from the Actions column.

Step 2:
Determine the master, submaster, or other hierarchy code under which the operating codes belong and highlight it. You may have to select the black triangle next to items higher up in the hierarchy to get items lower in the hierarchy to appear. In this example we will add operating codes to the submaster SM'AA so you may have to select M'A (or the triangle) to get SM'AA to appear.

Step 3:
Select **Add Op Coremark / Keymark**.



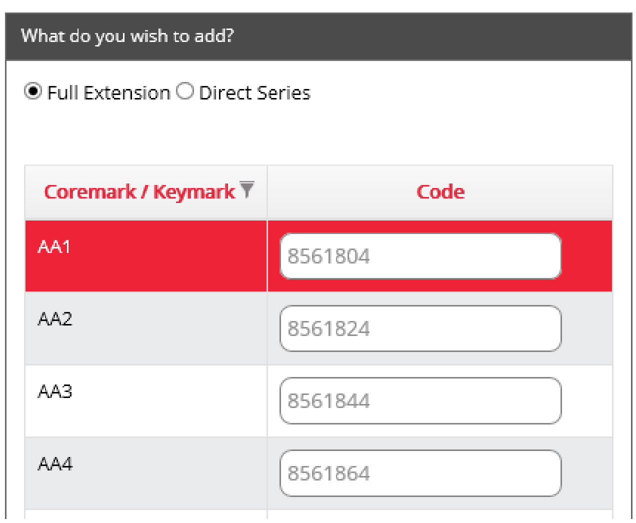
Step 4:
Note the two options at the top of the Add Op Coremark / Keymark window:

Full Extension: A series of operating codes that uses the full capacity of the master, submaster, etc. To add a full extension, go to Step 5.

Direct Series: A series of operating codes that uses only a portion of the capacity of the master, submaster, etc. To add a direct series, go to Step 7.

Step 5:
To add a full extension, select the Code field of the first Operating Coremark / Keymark and complete the code in the places represented by dashes. Use the Tab key to advance to the next Operating Coremark / Keymark. Only four of the 16 available in this series are shown here. The window will list all available.

Step 6:
When all the Code fields are complete, select **Save**. Note that if you only complete the codes of a portion of the Operating Coremark / Keymark series, only those completed codes will save. The remainder can be added later.

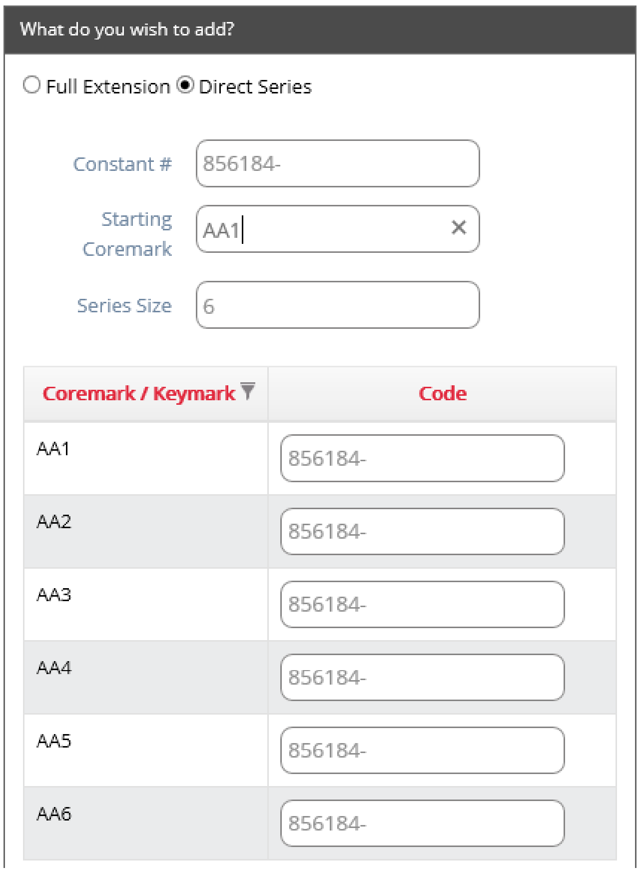


Step 7:
To add a direct series, select the **Direct Series** radio button and enter the following details:

Constant #: These are the key cuts of the series that are constant for all the codes in the series. Some key cuts will already be present in this field. Identify additional constant numbers in the code records provided by BEST Access Solutions and add them in the appropriate places represented by dashes. Note that this action will not remove all dashes. There must be at least one dash remaining in the Constant # field in order to successfully enter a direct series.

Starting Coremark: This field is already completed by Keystone Web.

Series Size: This is the total number of codes to be entered. The figure entered here should match the size of the series found in the code records supplied by BEST Access Solutions.



Step 8:
Once the direct series setup is ready, add the codes following Step 5 and Step 6.

Manually Enter Codes: Adding Selectivity

Selectivity is the modification of codes to allow multiple keys to operate when combined into a core. In the code records provided by BEST Access Solutions, selective codes will appear with additional numbers (key cuts) stacked on top of an existing code. The Coremarks of selective codes include a suffix (typically, "X") to indicate the presence of selectivity.

Coremark and Keymark creation is automated in Keystone Web, so if you have a selective code to enter, save it until you have entered the code series to which it belongs.

Step 1:
If you are not already at the Masterkey Details screen, select **MasterKey** from the left menu bar or from the dashboard and find the system to which the selective code belongs.

Highlight the row and select the **Details of this system** icon from the Actions column.

System	System Type	Pins	Keyway	Mark	Keystamp	Actions
User Guide	A2	7	X10W	S	699800	

Step 2:
In the Master Level Keymark column, open the system hierarchy and highlight the master, submaster, etc. under which the selective code appears in the code records supplied by BEST Access Solutions. It will turn red and the operating Coremark / Keymark series will appear on the right side of the screen.

Step 3:
Select the base Coremark / Keymark from the list. This is the code that is used to create the selective code. For example, a selective code called AA1X would have a base Coremark / Keymark called AA1.

Step 4:
With the base Coremark / Keymark highlighted, select **Manage Coremark** from the tool bar.

\+ ADD MASTER LEVEL KEYMARK   + ADD OP COREMARK / KEYMARK   MANAGE COREMARK

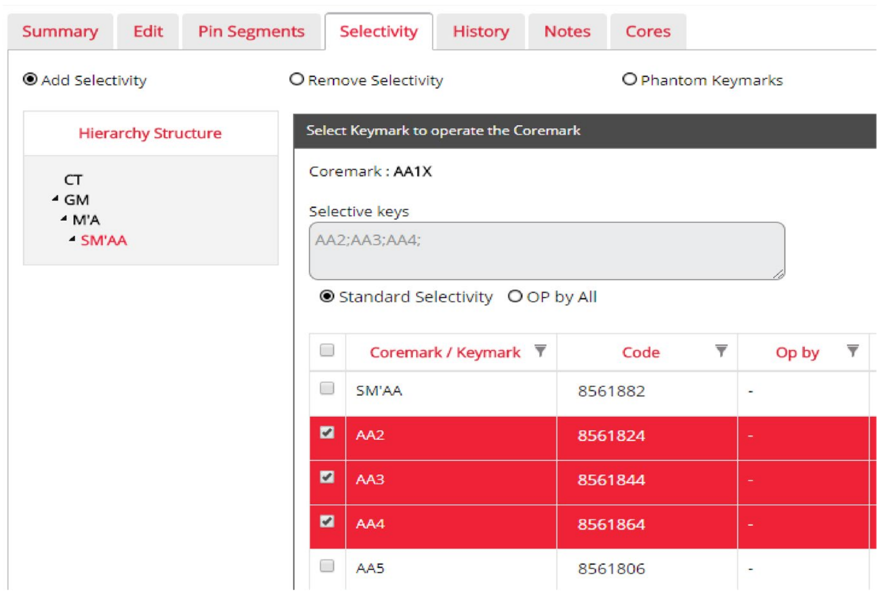
Master Level Keymark	Code	Status
CT	• 4947466	-
GM	• 2183682	-
M'A	• 8563682	-
SM'AA	• 8561882	-

Coremark / Keymark	Code	Op by
SM'AA	8561882	-
AA1	8561804	-
AA2	8561824	-
AA3	8561844	-

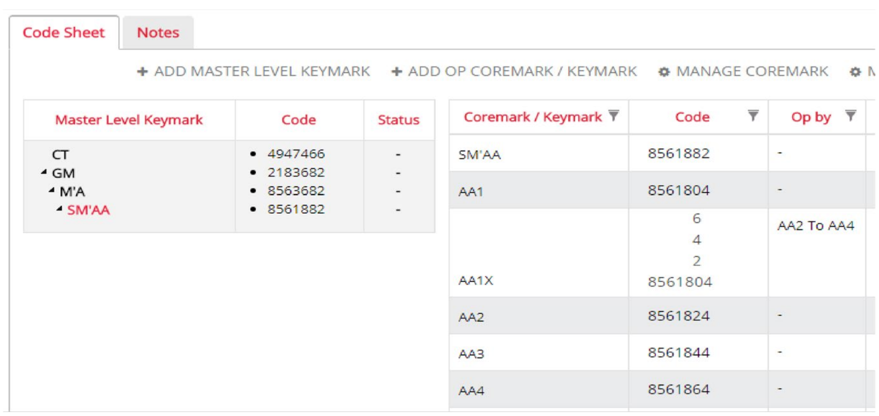
Step 5:
In the Coremark screen select the **Selectivity** detail tab.

Summary	Edit	Pin Segments	Selectivity	History	Notes	Cores

Step 6:
Open the system hierarchy and highlight the master, submaster, etc. under which the "operated by" codes appear. The code records supplied by BEST Access Solutions should list the additional codes that operate the selective code you are entering. Find each of the codes in the "operated by" list and select the box beside them to add a checkmark.



Step 7:
Select **Save** to complete the action. Keystone Web automatically creates a new Coremark / Keymark record for the selective code that appears below the base Coremark / Keymark in the Manage Masterkey list.



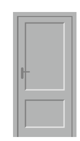
3 Doors and Cores

Doors and Cores

This chapter describes the following actions:

- Add a New Door and Building Record
- Install a Core
- Use a Self-Serve Door Import Template

Add a New Door and Building Record



Step 1:
From the left menu bar or dashboard, select the **Doors** icon.

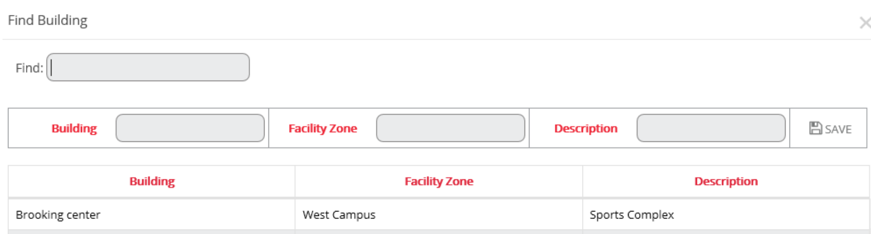
Step 2:
Select **Add Door**.

Step 3:
Enter information in the following fields in the Add Door window (*indicates a required field):

Door Number*: The name used to identify the door for the record you are creating.

Building*: The name of the building in which the door is located.

Note: When the Building field is selected, it will automatically display a list of existing building records in Keystone Web. You can select the appropriate building from the list or, if the building needed is not present, you can add the building record in the process of creating this door record. Enter the building name, the facility zone, and description and select **Save**. Only the building name is a required field.



Facility Zone: If your organization practices zone maintenance, this is the name of the zone in which the building is located. Note that this field is completed automatically with the selection of the building for the door record – it is not an independently entered field.

Description: Any distinct or notable features of the door.

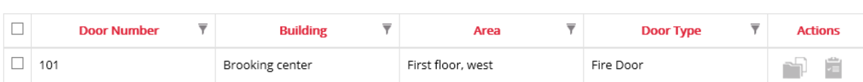
Area in Building: The area, or floor, in the building where the door is located.

Type: The construction material of the door (glass, metal, wood, etc.).

Step 4:
Select **Save** to complete the door record creation or select **Save and Add Another** if more door records are needed.

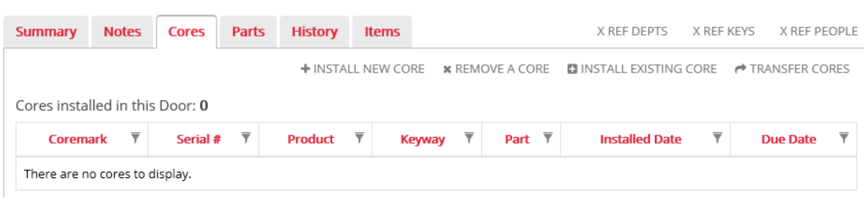
Install a Core in a Door

Step 1:
Select the **Doors** icon from the left menu bar. From the Manage Doors table, find the door record in which you want to install a core and select the **Details** icon from the Actions column.

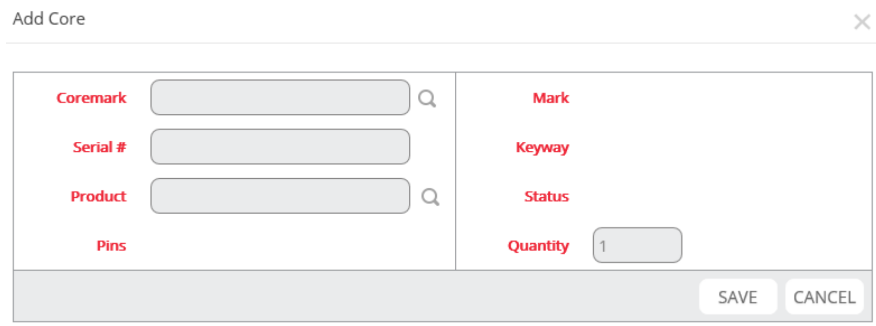


Step 2:
Select the **Cores** detail tab.

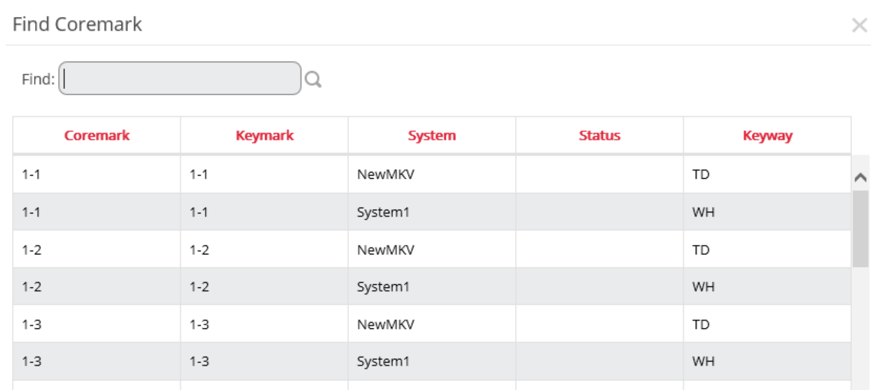
Step 3:
Select **Install New Core** if you need to create a new record for the core (the physical core you are installing does not currently have a record in Keystone Web).



Step 4:
Enter information in the following fields in the Add Core window:



Coremark field: Select the Coremark field and a window showing a list of coremarks in the database appears. Select the Coremark for the core you want to create.



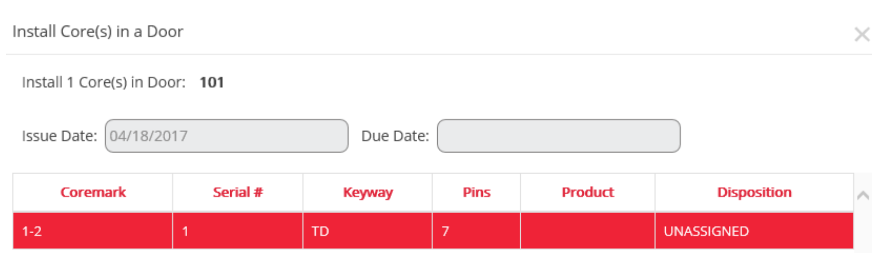
Serial #: Apply a serial number if needed. Serial numbers will be created automatically if the serialization configuration setup under the settings section specifies mandatory serialization for cores.

Product: Associate a product if needed. Note that when the product field is chosen it opens the Find Product window, showing all the products in the database. Once a product is selected it is added to the product field of the Add Core window.

Quantity: If needed, change the quantity from the default of 1.

Step 5:
Select **Save**.

Step 6:
The Install Core(s) in Door window appears. The issue date defaults to the current date. This date can be changed and a due date can be entered if needed.

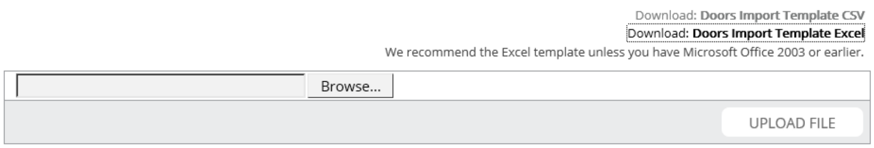


Step 7:
Select **Confirm Install** at the bottom right of the window to complete the core installation.

Self-Serve Door Import Template

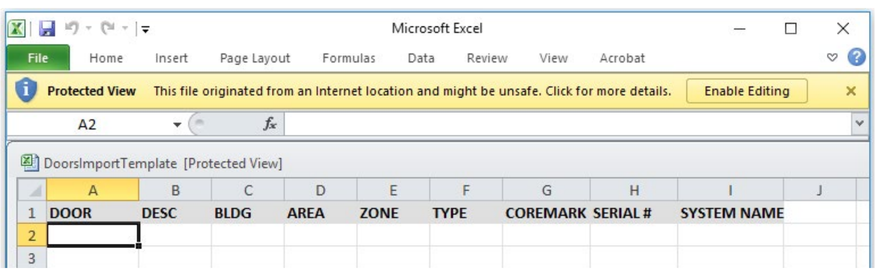
Step 1:
Select **Doors** from the left menu bar. From the Manage Doors screen, select **Import Doors**.

Step 2:
Select a link in the upper right hand corner to download a Doors Import Template. Note: For Microsoft Excel 2007 and later we recommend using “Doors Import Template Excel.”



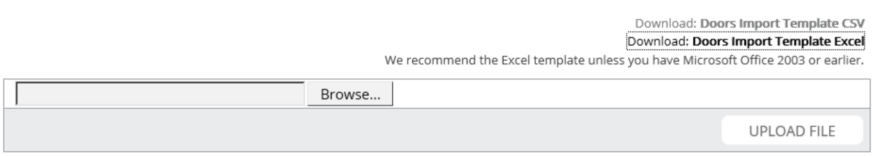
Step 3:
If necessary, select **Enable Editing** in the template and complete the template with all doors and door-related information as needed.

> **Note:** Only the required fields in an on-screen door record creation are required for successful template imports. Upon uploading the completed template, Keystone Web will create the building record (if it doesn’t already exist) and all the door records entered in the template.
>
> **Note:** If you enter into the coremark column coremarks that are present in your database, Keystone Web will create a core record and install cores for each door. The system name column is required if multiple masterkey systems in your database contain identical coremark names.



Step 4:
Save the template in your documents.

Step 5:
In the Import Doors screen, select **Choose Files** or **Browse** (depending on web browser in use), and navigate to where the import template has been stored.



Step 6:
Select **Upload File**.

Step 7:
A confirmation message “Data processed successfully” appears or errors are reported if the template contains insufficient data.

4 People and Keys

Adding People and Issuing Keys

This chapter describes the following actions:

- Add a New Person and Department Record
- Issue a Key to a Person
- Use a Self-Serve People Import Template

Add a New Person and a Department Record

Step 1:
From the left menu bar or the dashboard, select **People**.

Step 2:
Select **Add People**.

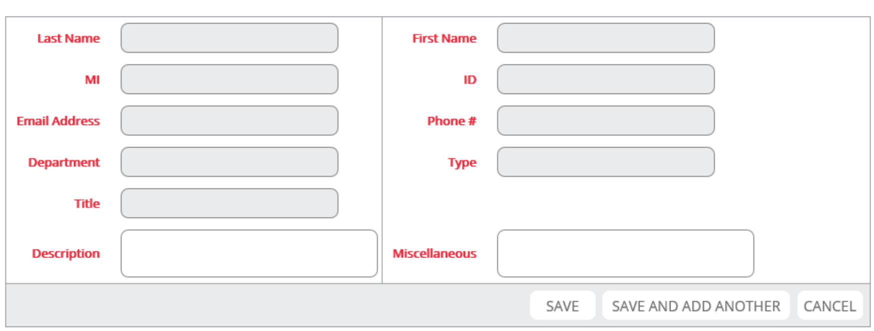
Step 3:
Complete the following fields in the Add People window (*indicates a required field):

Last Name*:

First Name*:

MI: Middle initial

ID: The person's identification number in your organization.

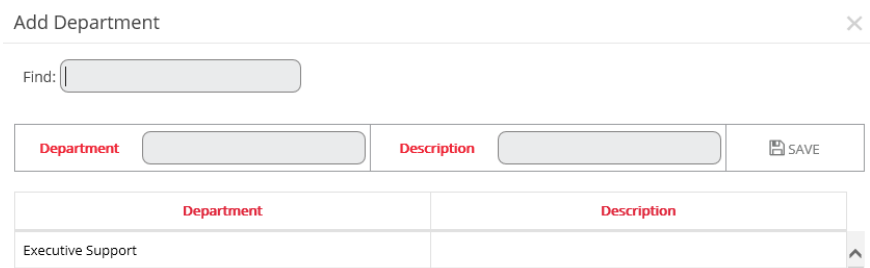


Email Address*:

Phone #:

Department: The department to which the person belongs.

Note: When the Department field is selected, it will automatically display a list of existing Department records in Keystone Web. You can select the appropriate Department from the list or, if the Department needed is not present, you can add the Department record in the process of creating this person's record. Enter the Department name and Description and select **Save**. Only the Department name is a required field.



Type: The role, or type, of the person in your organization (student, employee, contractor, full time, part time, etc.).

Title: The person's title in your organization.

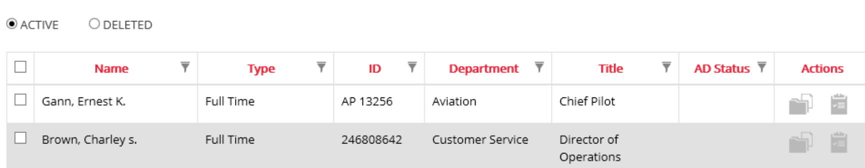
Description: Any distinct or notable information about the person.

Miscellaneous: Any additional information required for this person's record.

Step 4:
Select **Save** to complete the person record creation or select **Save and Add Another** if more People records are needed.

Issue a Key to a Person

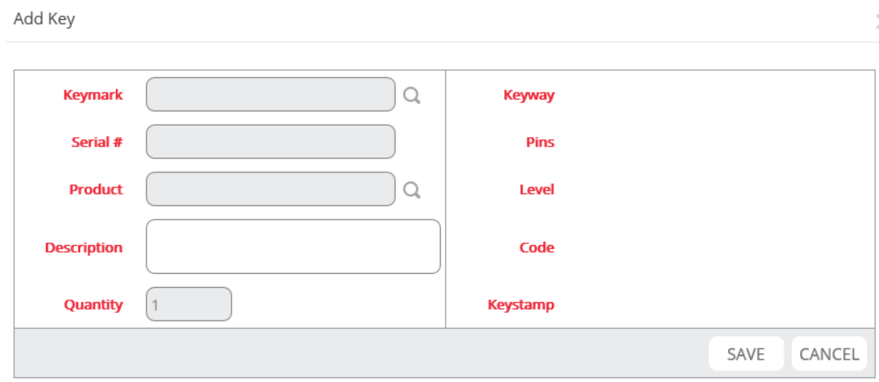
Step 1:
From the **Manage People** screen, find the person's record to whom you want to issue a key and select **Details** from the Actions column.



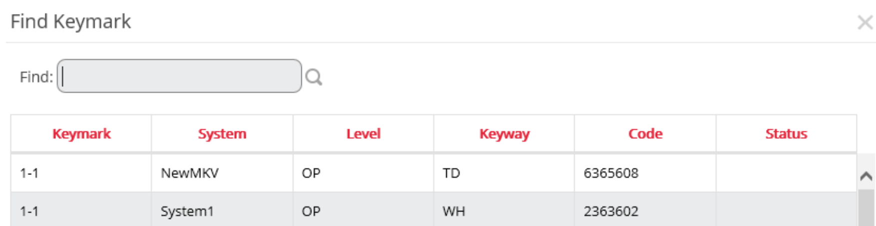
Step 2:
Select the **Keys** detail tab.

Step 3:
Select **Issue New Key** if you need to create a new record for the key (the physical key you are issuing does not currently have a record in Keystone Web).

Step 4:
Enter information in the following fields in the Add Key window:



Keymark: When selected, a list of keymarks in the database appears. Select the keymark for the key you want to create.



Keymark	System	Level	Keyway	Code	Status
1-1	NewMKV	OP	TD	6365608	
1-1	System1	OP	WH	2363602	

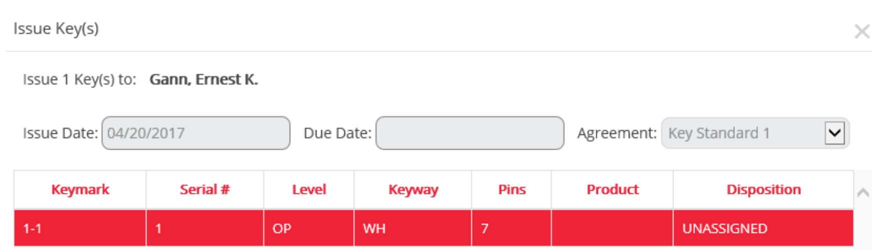
Serial #: Apply a serial number if needed. Serial numbers will be created automatically if the serialization configuration setup under the settings section specifies mandatory serialization for keys.

Product: Associate a product if needed. Note that when the product field is chosen it opens the Find Product window, showing all the products in the database. Once a product is selected it is added to the product field of the Add Key window.

Quantity: If needed, change the quantity from the default of 1.

Step 5:
Select **Save**.

Step 6:
The Issue Key(s) window appears. The issue date defaults to the current date. The issue date can be changed and a due date can be entered if needed.



Keymark	Serial #	Level	Keyway	Pins	Product	Disposition
1-1	1	OP	WH	7		UNASSIGNED

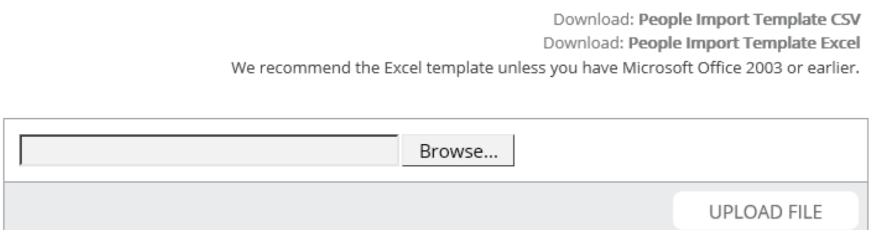
Step 7:
Select an agreement to print if needed or select **None** if no agreement is required. Agreements can be created from the settings section (Settings → Agreements) and a default agreement can populate during the key issue process by setting a default in the settings section (Settings → Agreement Defaults).

Step 8:
Select **Confirm Issue** to complete the key issuance.

Self-Serve People Import Template

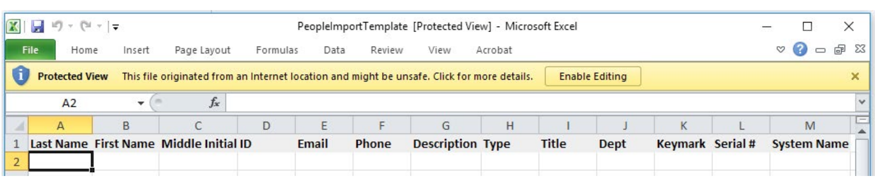
Step 1:
From the Manage People screen, select **Import People**.

Step 2:
Select a link in the upper right hand corner to download a People Import Template. Note: For Microsoft Excel 2007 and later we recommend using "People Import Template Excel."



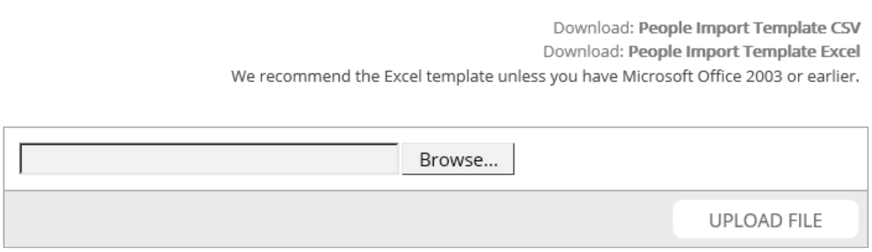
Step 3:
If necessary, select **Enable Editing** in the template and complete the template with all people and people-related information as needed and save it in your documents.

> **Note:** Only the required fields in an on-screen people record creation are required for successful template imports. Upon uploading the completed template, Keystone Web will create the department record (if added to the template and if it doesn't already exist in the database) and all the people records entered in the template.
>
> **Note:** If you enter into the keymark column keymarks that are present in your database, Keystone Web will create a key record and issue keys to each person. The system name column is required if multiple masterkey systems in your database contain identical keymark names.



Step 4:
Save the template in your documents.

Step 5:
Select **Choose Files** or **Browse** (depending on web browser in use), and navigate to where the import template was stored.



Step 6:
Select **Upload File**.

Step 7:
Confirmation message "Data processed successfully" appears or errors are reported if the template contains insufficient data.

5 Email Notifications

Connecting Keystone Web to the Email Server

For Keystone Web's email notification features to work the software must be connected to your organization's email server. This connection is typically made during the installation process (see the Keystone Web Getting Started Guide, page 7, step 5 in the "Installing Keystone Web Software" section).

If connection to the email server was not established during software installation, please see the embedded document called Keystone Web Configuration Setting on page 11 of the Getting Started Guide under the section entitled "Configuration Settings for Keystone Web Application."

Email Notifications Overview

Email notifications can be created for any Item and in three Categories. These terms are defined below.

Item: Keys, Cores, Keyrings, and Parts. Any trackable component of the mechanical access control system for which a record is kept in Keystone Web.

Category: The condition of the Item in terms of its use or disposition in Keystone Web: Issued, Returned, Due.

Notifications are sent only for Items associated with people. Items that are associated with records other than people are ineligible for notifications. For example, a core installed in a door does not produce an email notification.

If a person is being issued or is in possession of an Item, email notifications are sent to that person by default once the Email Notification is created. Additionally, distribution of the emails to other people can be configured. Other recipients of emails are organized in the following categories:

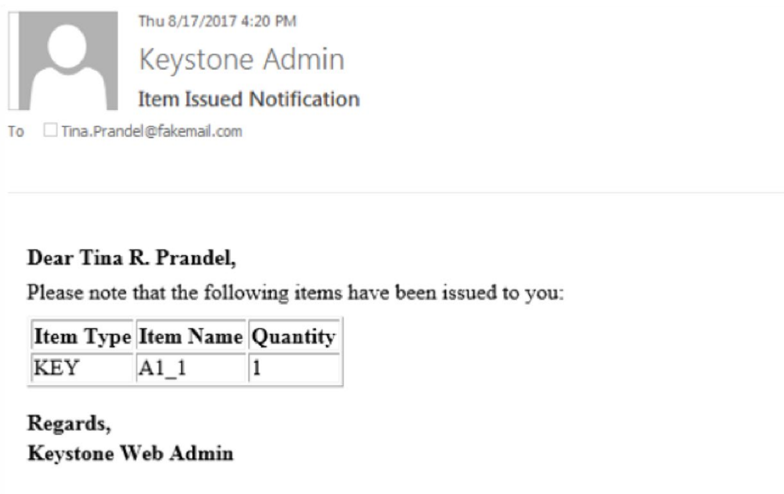
Other Keystone Web Users: People who have user accounts in Keystone Web.

Additional Recipients: People who need to receive some email notifications for the Item/Category in view, but not all. See below section: Configuring Email Notifications, for more information on Additional Recipients.

Myself: The Keystone Web user creating the Email Notification.

Security Personnel: People who are not Keystone Web users, but require notification for every occurrence of the Item/Category in view. See below section: Configuring Email Notifications, for more information on Security Personnel.

By default, notifications convey basic information about the Item/Category in view. Here is an example of the default content for Keys/Issued.


Thu 8/17/2017 4:20 PM

Keystone Admin

Item Issued Notification

To Tina.Prandel@fakemail.com

Dear Tina R. Prandel,

Please note that the following items have been issued to you:

Item Type	Item Name	Quantity
KEY	A1_1	1

Regards,
Keystone Web Admin

The user can create additional content for the email in the Body field. Any additional content appears between the grid identifying the item and the complimentary close.

Configuring Email Notifications

Email notifications are an Administrator-level permission in Keystone Web. Administrators access the email notifications configuration screens by the following path: **Settings > Email Notifications**.

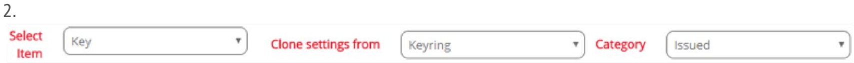
Step 1:
Select the Add Email Notification button to start a new email notification.

Step 2:
Select the Item (Key, Keyring, Core, or Part) for which you want to create the email notification.

Step 3:
If the new email notification is to be configured to match an existing notification, select the existing notification Item from the **Clone settings from** list. Doing so will cause a secondary field (**Category**) to appear, allowing for the choice of the Item's Category for the existing notification you intend to clone. For example, in the second image below the user is setting up a new email notification for Keys/Issued and this new notification will be cloned from the existing notification for Keyrings/Issued. With this action, all other fields and options in the configuration page will populate automatically. No further configuration (as described in steps 4 to 10 below) is required. Once saved, a new notification will have been created for Keys/Issued whose configuration is identical to the Keyrings/Issued notification already on record.

1.

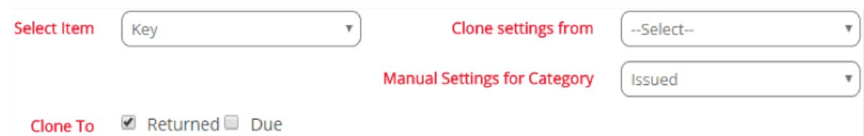
2.



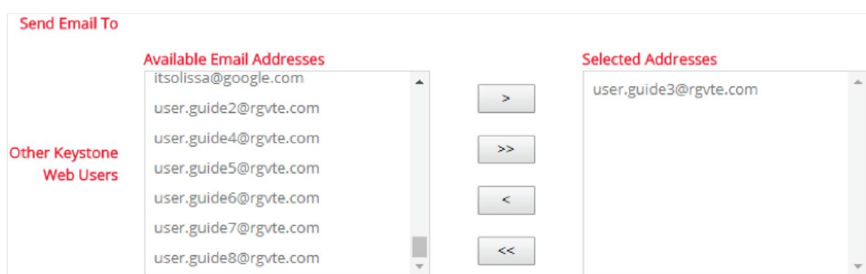
Step 4:
If the new email notification is not to be configured like an existing notification, use **Manual Settings for Category** to select the Category (Issued, Returned, Due) for the Item. Doing so will cause a secondary field (**Clone To**) to appear, allowing for the option to simultaneously create a second and third notification that will be configured exactly like the one currently being configured. The second and third notifications will be for the two Categories not selected in the **Manual Settings for Category** field. For example, in the second image below the user is manually setting up a new email notification for Keys/Issued and also wants to clone a notification for Keys/Returned. When complete, two new notifications will have been created (one for Keys/Issued, one for Keys/Returned) whose configuration will be identical.

1.

2.



Step 5:
If other Keystone Web users need to see the emails for the notification being created, choose them from the **Other Keystone Web Users** list. Highlight the appropriate email address in the **Available Email Addresses** list and select the single-right arrow button to move it to the **Selected Addresses** list. In the example below, Keystone Web User **user.guide3@rgvte.com** has been added to the distribution for this email notification. To add multiple addresses to the **Selected Addresses** field, select one address from **Available Email Addresses**, press the Ctrl key, and select additional addresses. When all the desired addresses are highlighted, select the single-right arrow button to move them to the **Selected Addresses** list.



The other arrow buttons work as follows:

Single-left arrow button: moves user addresses back to Available Email Addresses

Double-right arrow button: moves all user addresses from Available Email Addresses to Selected Addresses

Double-left arrow button: moves all user addresses from Selected Addresses to Available Email Addresses

Step 6:
Additional Recipients are people who need to receive some email notifications for the Item/Category in view, but not all. If this setting is chosen, during the Item/Category transaction a window appears, allowing the user to enter email addresses to receive notification, or to skip additional recipients. For example, if John Smith needs to be notified in some instances when a key is issued, but not for every key that is issued, the Additional Recipients setting should be chosen when creating the Keys/Issued notification. Thereafter, each time you issue a key to a person, a window will appear at the end of the

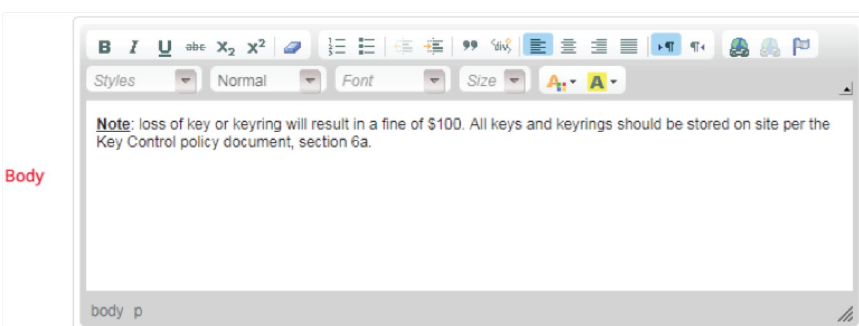
process, allowing the user to enter John Smith's email address. If John doesn't need to receive notification of the key being issued, the user simply chooses the Cancel button in the window to complete the key issuance.

To activate the Additional Recipients option, click to add a check to the box, per the image below.

Step 7:
If the Administrative user setting up the email notification wants to receive every email for the Item/Category in view, click to add a check to the box labeled **Myself**, per the image below.

Step 8:
The **Security Personnel** section is used for people who are not Keystone Web users, but require notification for every occurrence of the Item/Category in view. For example, if Lisa Jones and Adam Hull need to receive an email when keyrings are returned, but neither one is a Keystone Web user, their email addresses are entered in the Security Personnel field. This ensures that Lisa and Adam receive emails each time a keyring is returned. Enter all email addresses desired for the Security Personnel option into the field provided. Note that email addresses should be separated from each other by a comma, which is noted in the field, as seen in the first image below.

Step 9:
The **Body** field is used to specify additional content that should appear in the email for the Item/Category in view. See above section: Email Notifications Overview, for the default email content. In the example below additional content has been specified for Keys/Issued and Keyrings/Issued.



Step 10:
Select the **Save** button to complete the email notification.

Scheduling Email Notifications

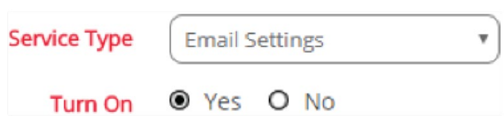
For most Item/Category combinations, email notifications are sent out immediately upon completion of the transaction and so no scheduling is required. However, for all Items combined with the Due Category, scheduling is required and configurable as an Administrator-level permission. The following table identifies when scheduling does and does not apply.

Item/Category	Email Scheduling Enabled?
Keys/Issued	No
Keys/Returned	No
Keys/Due	Yes
Cores/Issued	No
Cores/Returned	No
Cores/Due	Yes
Keyrings/Issued	No
Keyrings/Returned	No
Keyrings/Due	Yes
Parts/Issued	No
Parts/Returned	No
Parts/Due	Yes

Administrators access the Email Notifications Scheduler by the following path: **Settings > Email/AD Sync Scheduler**.

Step 1:
Select Email Settings from the **Service Type** field to begin email scheduling.

Step 2:
The **Turn On** radio button selection defaults to No after installing the software. Change it to Yes to start the activation process. Note that selecting the No radio button will cease distribution of emails for Keys/Due, Cores/Due, Keyrings/Due, and Parts/Due if you have created email notifications for these Items/Categories.



Step 3:
Once the **Service Type** is changed to Email Settings and the **Turn On** radio button is set to Yes, the **Frequency** field appears for selection. Select Daily, which is the only feasible option for Email Settings since email notifications may include Items/Due and such notifications should not occur later than the due date. Note that Items can be given a Due Date when they are issued.

Step 4:
The **Time** fields allow the user to specify the time of day email notifications for Items due will be sent. In the example below, notifications for Items due are scheduled to be sent at eight o'clock each morning. Note the following:

- If a person has multiple Items due on the same day that are of the same type, a single email will be sent listing all the items. For example, if Richard Franz has four keys due today, one email with all four keys listed will be sent this morning at eight o'clock.
- If a person has multiple Items due on the same day that are of different types, emails will be sent to address each type of Item due. For example, if Michelle King has a part and a keyring due today, two emails (one for the part, one for the keyring) will be sent this morning at eight o'clock.
- Emails for items due are only sent once. Items that are past due are administered in the Alerts screen.

Step 5:
Select the **Save** button to complete email scheduling.

6 Active Directory Synchronization

Setting Up Active Directory Synchronization

For Keystone Web's Active Directory synchronization (AD sync) features to work the software must be configured to align with your organization's AD settings. This configuration is typically performed during the installation process (see the Keystone Web Getting Started Guide, page 8, step 6 in the "Installing Keystone Web Software" section).

If AD configuration was not performed during software installation, please see the embedded document called Keystone Web Configuration Setting on page 11 of the Getting Started Guide under the section entitled "Configuration Settings for Keystone Web Application."

Active Directory Synchronization Overview

AD sync uses your organization's AD to facilitate the creation and maintenance of People records in Keystone Web. Some of the specific benefits include:

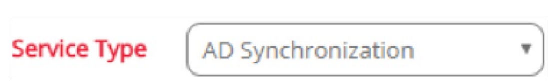
- Reducing data entry when manually adding new people
- Aligning the format of Keystone Web's People records with your organization's standard (e.g. Department names, use of Middle Initial, name spelling, etc.)
- Updating migrated Employee records from KS600n5 with important new fields like Email Address and Phone Number
- Continual updating of People records to reflect changes made in AD (e.g. individuals who leave the organization, name changes, etc.)

Note that the connection between AD and Keystone Web is unidirectional, i.e. AD updates Keystone Web, but Keystone Web does not update AD.

Active Directory Synchronization Scheduler

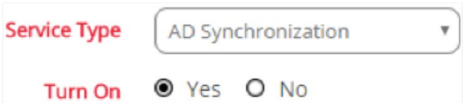
Keystone Web can automatically attempt to synchronize People records with your organization's AD records based upon a configurable recurrence established in the AD Sync Scheduler screen. Administrators access the AD Sync Scheduler by the following path: **Settings** > **Email/AD Sync Scheduler**.

Step 1:
Select AD Synchronization from the **Service Type** field to begin scheduling.

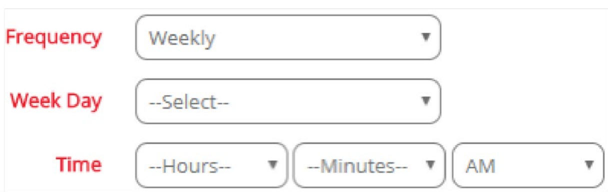


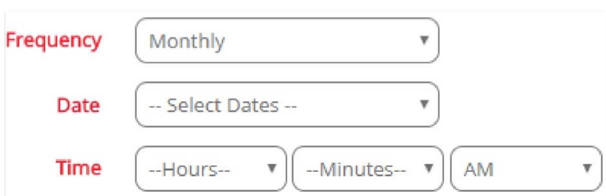
Step 2:
The **Turn On** radio button selection defaults to No after installing the software. Change it to Yes to activate scheduled AD Synchronization. Note that selecting the No radio button will cease automatic

synchronization of People records to AD.



Step 3:
Once the **Service Type** and **Turn On** settings are made the **Frequency** field should appear for selection. Choose Daily for common applications. Other options are Weekly and Monthly. As seen in the images below, available options are the **Time** of day, the day of the **Week**, or the **Date** in the month, depending on the choice made for **Frequency**.



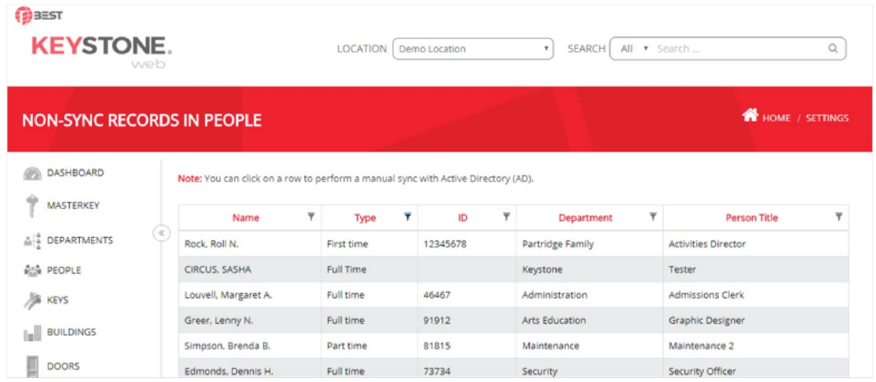


During the scheduled AD Sync activity, Keystone Web will attempt to connect and align your organization's AD records with People records in the Keystone Web database. Once a connection has been secured between a record in AD and a record in People, Keystone Web stores the AD Globally Unique Identifier (GUID) for the person. Because the GUID never changes for an AD object, it can then serve to ensure a connection between AD and Keystone Web for the person's record regardless of what other information about the person might change. For example, if Heather Sanderson has a record in People and a connection has been made to her AD record, when her last name changes to Lund in AD, the People record in Keystone Web will update during the next scheduled AD Sync activity and thereafter show Heather Lund.

The synchronization between AD and Keystone Web People records is based on the following rules:

- Last Name, First Name, and Middle Initial are used to confirm a connection between an AD record and a migrated Keystone Web record (also see the section below, "Synchronization and Data Migration from KS600n5").
- Matches will occur without Middle Initial, but only if the Middle Initial is absent from AD and the Keystone Web record.
- Information from the AD record will overwrite information in the People record where there are discrepancies between the two.
- Only exact matches based on the above criteria will result in a connection. In cases where there are no exact matches between AD and Keystone Web records, the affected People records will appear on the Non-Sync Records list (**Settings** > **AD Manual Sync**). The image below shows a list of records in the Non-Sync records list. See the section below, "Active Directory Synchronization: Daily Use," for information about manual synchronization.

- If there is more than one exact match, all affected People records will appear on the Non-Sync Records list (**Settings > AD Manual Sync**). The image below shows a list of records in the Non-Sync records list. See the section below, "Active Directory Synchronization: Daily Use," for information about manual synchronization.



Synchronization and Data Migration from KS600n5

When AD sync is active, Keystone Web will attempt to connect and align your organization's AD records with migrated records from the Employee card of KS600n5 (migrated into the People records of Keystone Web). See the above section ("Active Directory Synchronization Scheduler") for details about the method and rules in place for synchronization, which also apply to employee records migrated from KS600n5. Also, note the following:

- Information from the AD record will overwrite information in the People record where there are discrepancies between the two.
- Employee records migrated from KS600n5 can be used in Keystone Web even if a connection to an AD record is not secured, but fields like Email Address and Phone Number must be updated manually.
- Without Email Addresses, People records cannot be used with Email Notifications.

Synchronization and Imported People Records

The People screen provides a template that can be used to import multiple People records at one time. Once the import of People records is complete the records that have been added become part of AD Sync activity. Keystone Web will attempt to connect and align your organization's AD records with the newly imported Peo ple records following the same rules outlined in the above Section, "Active Directory Synchronization Scheduler."

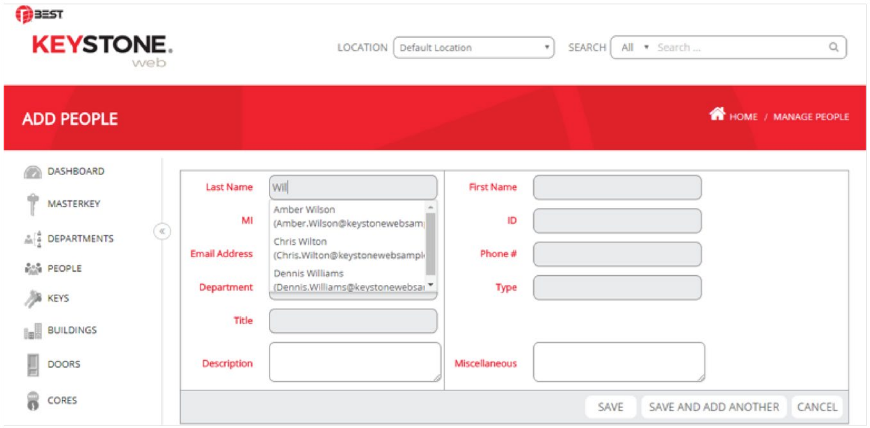
Active Directory Synchronization: Daily Use

Manually Adding People Records

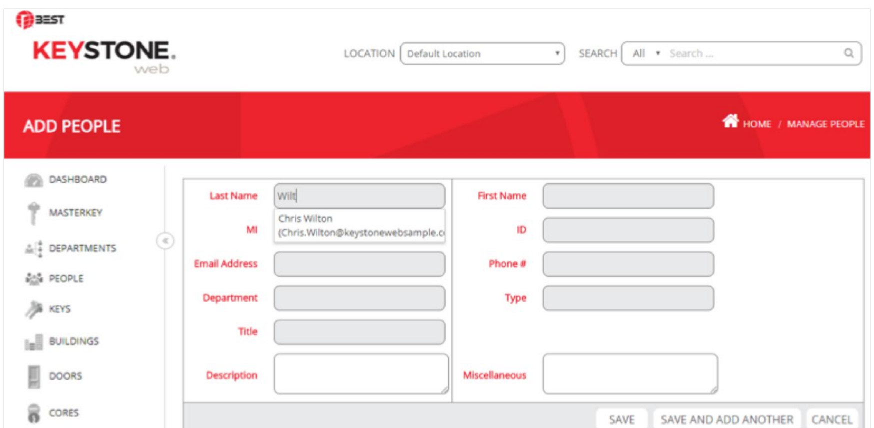
AD Sync can reduce the time spent manually entering People records during daily use. When a new person is added manually to the People list, AD sync attempts to find the person based on information the user types into the Last Name or First Name fields. When three characters have been entered in the Last Name or First Name fields, Keystone Web returns a list of matches from AD. The user can select one of the search results or continue to enter more characters to refine the results. Once a search result from AD is selected the rest of the People record fields populate automatically from the AD record of the selected person.

Step 1:
From the People screen, select **Add People**.

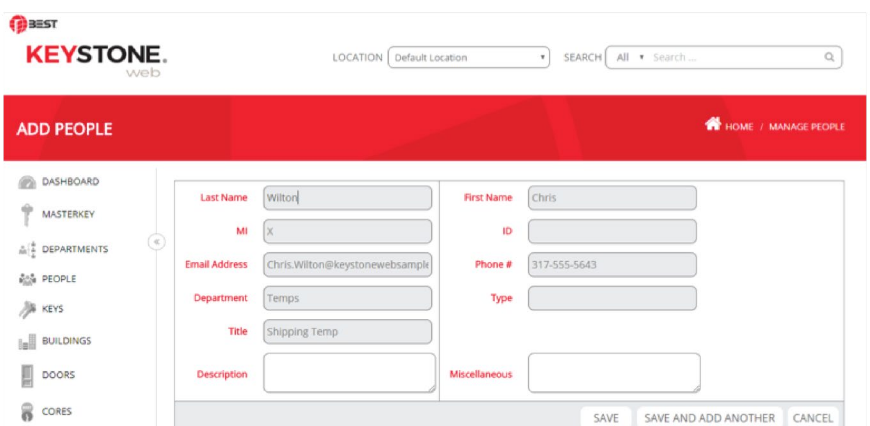
Step 2:
Enter at least three characters in the **Last Name** or **First Name** fields. In the example below, "Wil" has been entered in **Last Name**, producing three matches.



Step 3:
Refine the search (if desired) by entering more characters (list from AD updates automatically). In the example below, "Wilt" in **Last Name** refines the list to a single result.



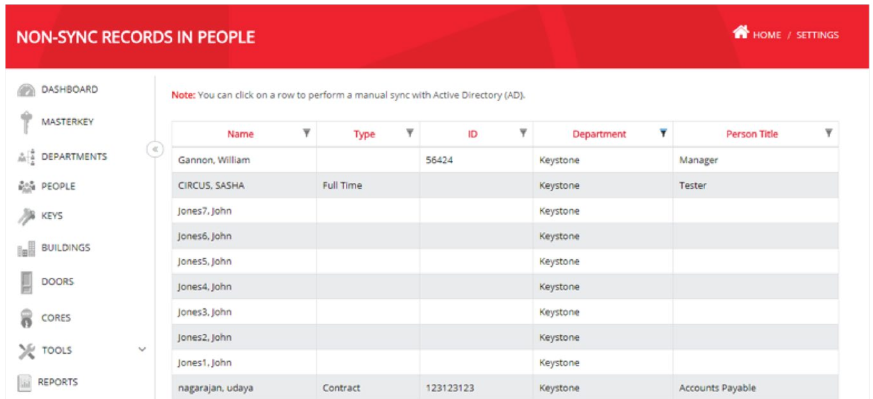
Step 4:
Select a search result to populate the rest of the AD information to the People record. In the example below, selecting the search result "Chris Wilton" populates **First Name, MI, Email Address, Phone #, Department,** and **Title** – all the fields that were configured during AD Sync setup.



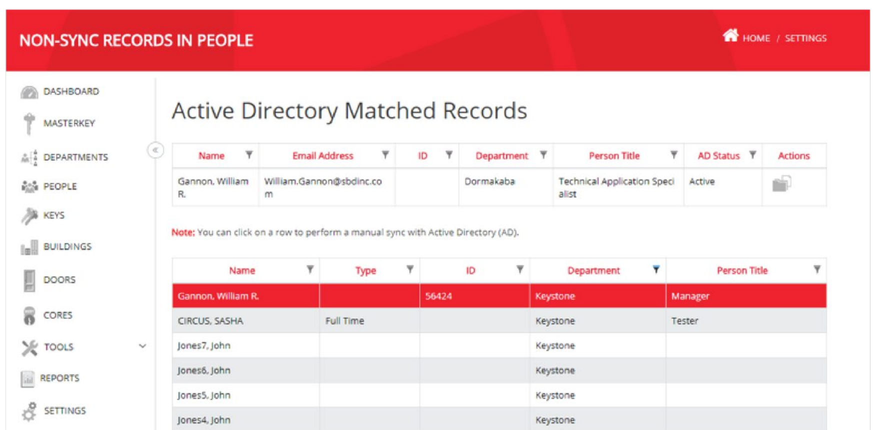
AD Manual Sync

Users can also manually synchronize People records to AD using AD Manual Sync (**Settings > AD Manual Sync**).

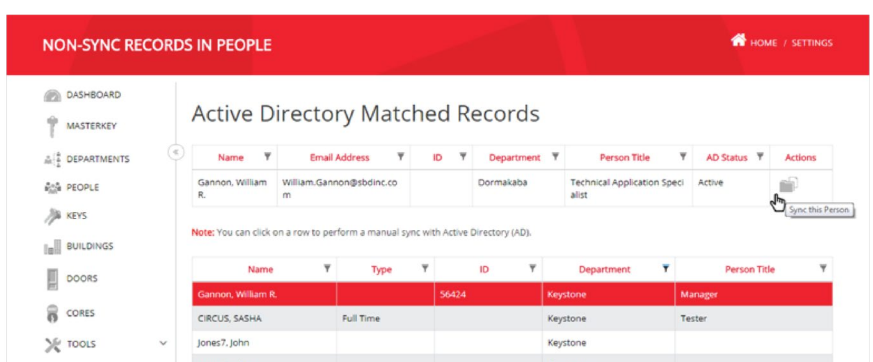
Step 1:
The AD Manual Sync (Non-Sync Records in People) screen displays all People records that do not have a connection to a record in AD.



Step 2:
When a record is selected from the list, a search is made for a match in AD and a new grid appears at the top of the screen called Active Directory Matched Records. If a match is found, the details of the matching record from AD will display, as shown in the example below. Note: If no match in AD is found for the selected People record, the grid displays the message, "There are no items to display."



Step 3:
In the **Actions** column of the Active Directory Matched Records grid, select the folder icon (**Sync this Person**) to synchronize the selected People record and the identified record from AD. Note that where there are discrepancies between the People record and AD, information from AD will overwrite previous information in the People record.



Active and Inactive AD Status

The People screen grid contains a column entitled AD Status. Here is a list of the values that may be found and what they signify.

Active: People records with this AD Status have been connected to an Active Directory record and are currently active in AD, i.e. they are actively part of the organization.

Inactive: People records with this AD Status have been connected to an Active Directory record, but the Active Directory record has been changed to an inactive status and is thus being reflected as such in Keystone Web.

[Blank]: People records with a blank AD Status have not been connected to an Active Directory record and so no status from Active Directory can be reported in Keystone Web.

Note: as with all columns in grids, the AD Status column can be filtered to see all records in a desired status. This may prove useful, for example, if users need to see people who have left their organization and are still in possession of keys or other items in Keystone Web.

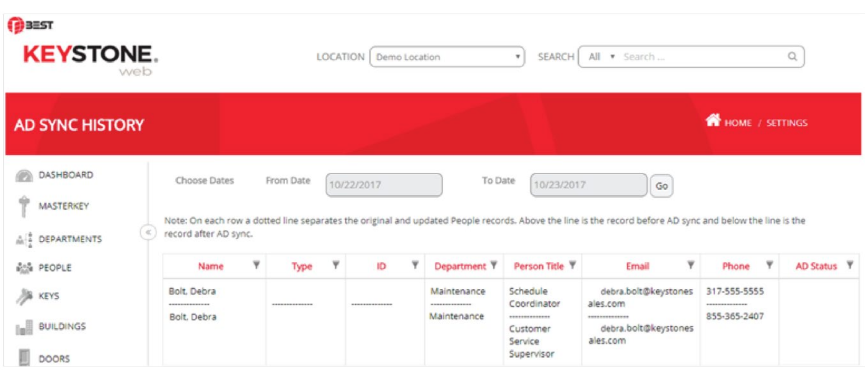
Active Directory Synchronization History

Keystone Web keeps a history of synchronization that shows changes made to the Keystone Web People records based upon updates from AD. Administrators access this history by the following path: **Settings** > **AD Sync History**.

Step 1:
Choose a range of dates for the desired period of history and then select **Go**.

Step 2:
As noted on the screen, on each row of the history results a dotted line separates the original and updated People records. Above the line is the record before AD Sync and below the line is the record after AD Sync. In the example below, Debra Bolt's **Phone Number** and **Title** changed during AD Sync during the selected time frame.

Note: AD Sync History only shows the most recent update. The record above the line is the information just prior to the last synchronization. If the record undergoes multiple updates over a long period, the information above the line will only show the most recent previous version of the record, not all previous versions.



7 Reports

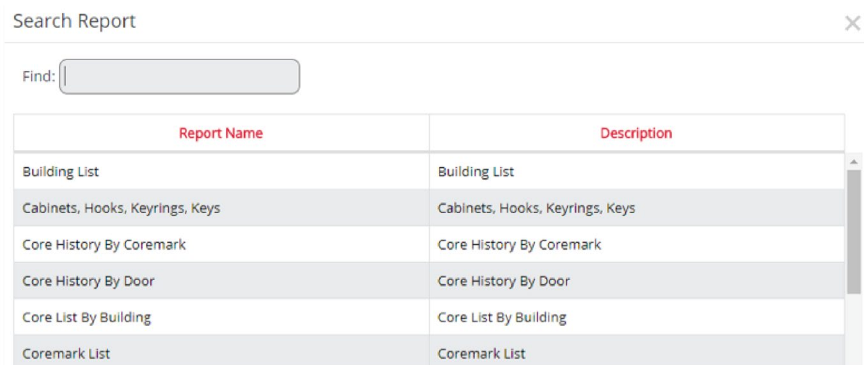
Reports Overview

Keystone Web generates reports from the data it stores based on the most common needs in key management environments. Users access Reports by the following path: **Home** > **Reports**. In the Reports screen are thirty-four base reports that can be formatted and saved in customized configurations. The Report Name serves as a description of the purpose each report serves, but the table below summarizes the number of reports based on the primary criteria.

Primary Criteria	Number of Reports	Report Names
Building Information	1	Building List
Cabinet Assets	1	Cabinets, Hooks, Keyrings, Keys
Core Information	4	Core History By Coremark Core History By Door Core List By Building Coremark List
Department Information	1	Department List
Door Information	6	Door List Door List By Area Door List By Building Door List By Coremark Door List By Description Doors and Cores By Building
Access Information	3	People With Access To Buildings People With Access To Doors People With Access To Doors Enhanced
People Information	5	People List People List By Department People List By Description People List By ID People List By Title
Key Information	4	Key History Key History By People Keymark List By Building Keys Due By Department
Key and Keyholder Information	6	Key and Keyholder By Key ID Key and Keyholder By Key Product Key and Keyholder By Keymark Key and Keyholder By Serial Number Key and Keyholder Deposits By Department Key and Keyholder Deposits By Key ID
Masterkey Information	2	Duplicate Masterkey Codes Keymark List With Codes
Physical Asset Control	1	Lost, Stolen, or Destroyed Items

The grid filter and sorting tools common to all lists in Keystone Web can be used to find a specific report, but the Reports screen also has a dedicated search feature, **Find Report**, located just above the Actions column.

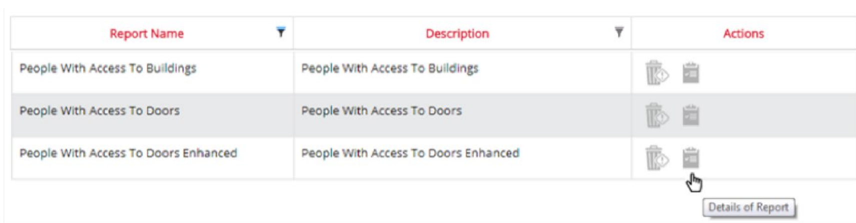
Selecting this feature will open a search window as shown in the image below. Enter a keyword to locate the desired report. Note that the search is for content in the Report Name column and that it functions as a "starts with" search.



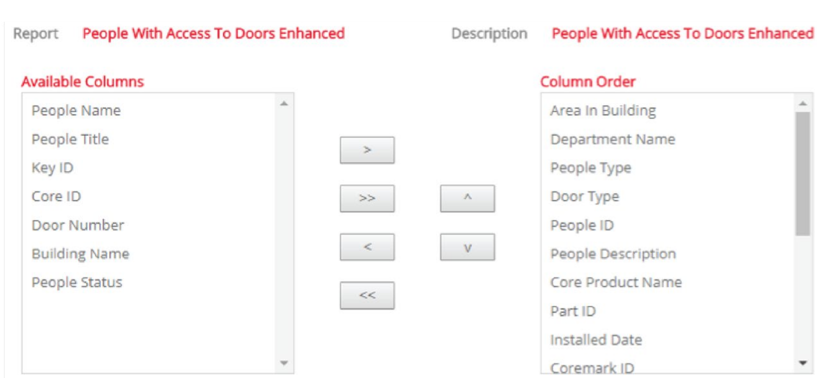
Building and Saving Custom Reports

As mentioned in the preceding section, base reports can be formatted according to the specific layout and constraints required for a user's reporting need. These formatted versions of base reports can be saved as new, custom reports. In this way, a user only needs to configure a report format once and thereafter can run the same report with the required frequency, saving time by not repeating report configuration steps.

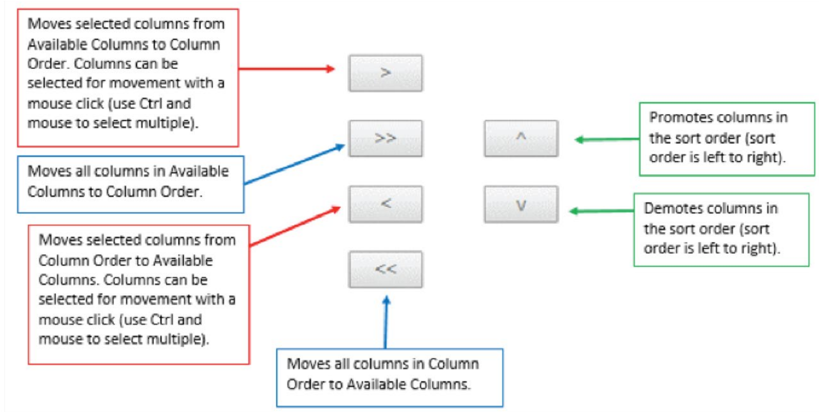
Step 1:
Select a base report that contains the data elements required and go into the Details of the report. For this instructional example, the base report "People With Access To Doors Enhanced" has been selected.



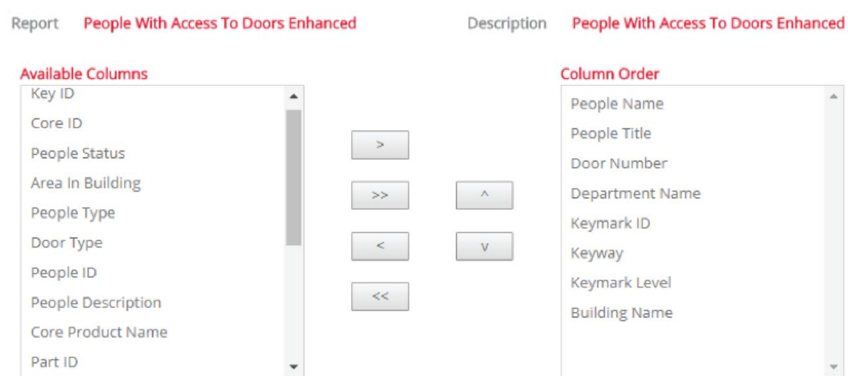
Step 2:
In the Report Details screen, select the columns and the order in which they appear. The **Available Columns** list on the left displays all the possible columns. The **Column Order** list displays the columns selected for inclusion in the report.



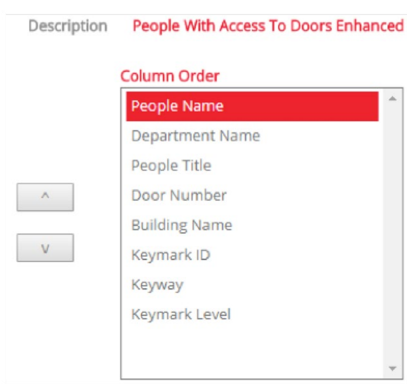
Step 3:
Note that when first entering Report Details, some columns may already be present in the **Column Order** list, but columns can be moved and removed using the arrow buttons located between the **Available Columns** and **Column Order** lists.



Step 4:
In the image below, all columns have been moved back to **Available Columns** and then the eight columns required for the report have been moved to **Column Order** using the left and right arrow and double-arrow buttons.



Step 5:
Once the desired columns are in the **Column Order** list, they can be organized by sort order, i.e. the order, from left to right, in which the columns should appear on the finished report. The image below shows the eight required columns arranged in the desired sort order using the up and down arrow buttons.



Step 6:

The Edit Report Constraints section is located at the bottom half of the Report Details screen. Report constraints allow users to limit to a designated "From/To" range what data will appear in the report. For example, if the sample report shown in step 5 above is needed for one building only, the building name can be added to both the **From** and **To** fields, as shown in the image below.

Edit Report Constraints

Field	From	To
Door Number		
Building Name	Fremont Hall	Fremont Hall
Area in Building		
Department Name		
Last Name		
First Name		
People Title		
People Type		

This configuration will generate a report that shows all the people with access to doors in Fremont Hall, as shown in the report preview below.

11/1/2017 11:03:18 AM

People With Access To Doors Enhanced

People Name	Department Name	People Title	Door Number	Building Name	Keymark ID	Keyway	Keymark Level
Edmonds, Dennis H.	Security	Security Officer	307	Fremont Hall	5-4	R	OP
Greer, Lenny N.	Arts Education	Graphic Designer	309	Fremont Hall	5-6	R	OP
Hui, Kwan L.	Security	Security Officer	306	Fremont Hall	5-3	R	OP
Jackson, Nathan E.	Maintenance	Maintenance 1	305	Fremont Hall	5-2	R	OP
Louvell, Margaret A.	Administration	Admissions Clerk	310	Fremont Hall	5-7	R	OP
McCarthy, Clay R.	Maintenance	Maintenance 1	301	Fremont Hall	4-3	R	OP
Mitchell, Rex P.	Maintenance	Maintenance 2	304	Fremont Hall	5-1	R	OP
Peterson, Oscar E.	Maintenance	Maintenance 2	302	Fremont Hall	4-4	R	OP
Simpson, Brenda B.	Maintenance	Maintenance 2	308	Fremont Hall	5-5	R	OP

Step 7:

Entire words are not required for report constraints. For example, if the sample report shown in step 5 above is needed for people whose last names range from "A" to "L," add the letter "A" to the **From** field and the letter "L" to the **To** field. This configuration will generate a report that shows all the people with access to doors whose last names range from "A" to "L," as shown in the report preview below.

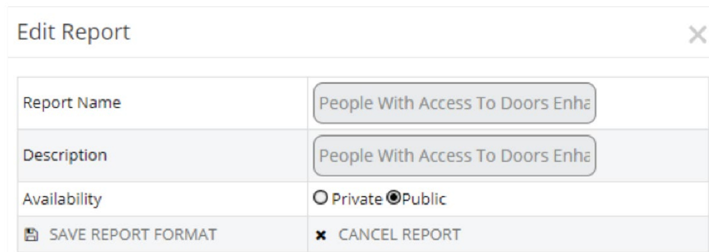
11/1/2017 11:22:00 AM

People With Access To Doors Enhanced

People Name	Department Name	People Title	Door Number	Building Name	Keymark ID	Keyway	Keymark Level
Adams, Jennifer S.	IT	Network Specialist	105	Brendley Hall	1-4	R	OP
Adams, Jennifer S.	IT	Network Specialist	106	Brendley Hall	1-4	R	OP
Anderson, Paul K.	Maintenance	Carpenter	206	Wexler Hall	3A1	R	OP
Barton, Clint E.	Administration	Sales	101	Brendley Hall	1-1	R	OP
Barton, Clint E.	Administration	Sales	104	Brendley Hall	1-1	R	OP
Beck, Kevin T.	Maintenance	Systems Engineer	105	Brendley Hall	1-4	R	OP
Beck, Kevin T.	Maintenance	Systems Engineer	106	Brendley Hall	1-4	R	OP
Doyle, Linda W.	Administration	Receptionist	202	Wexler Hall	2-5	R	OP
Edmonds, Dennis H.	Security	Security Officer	307	Fremont Hall	5-4	R	OP
Ferguson, Jason	Security		101	Brendley Hall	1-1	R	OP
Ferguson, Jason	Security		104	Brendley Hall	1-1	R	OP
Flemming, Henry A.	Operations	Shipping Clerk	203	Wexler Hall	2-6	R	OP
Fletcher, Bob S.	Maintenance	Janitor	204	Wexler Hall	2-7	R	OP
Greer, Lenny N.	Arts Education	Graphic Designer	309	Fremont Hall	5-6	R	OP
Henderson, Penelope V.	Class 2019	Student	208	Wexler Hall	3B1	R	OP
Himmes, Mary G.	Administration	Activities Director	102	Brendley Hall	1-2	R	OP
Holden, Henry A.	Maintenance	HVAC	101	Brendley Hall	1-1	R	OP
Holden, Henry A.	Maintenance	HVAC	104	Brendley Hall	1-1	R	OP
Hubert, Tom C.	Maintenance	Locksmith	209	Wexler Hall	4-1	R	OP
Hui, Kwan L.	Security	Security Officer	306	Fremont Hall	5-3	R	OP
Jackson, Nathan E.	Maintenance	Maintenance 1	305	Fremont Hall	5-2	R	OP
Jensen, Rick F.	IT	DBA	107	Brendley Hall	1-5	R	OP
Jones, Adam T.	Maintenance	Maintenance 1	205	Wexler Hall	2	R	M
Joyce, Mike J.	Arts Education	Choral Instructor	207	Wexler Hall	3A2	R	OP
Kelly, Robert L.	Finance	Financial Planner	103	Brendley Hall	1-3	R	OP
Klein, Naomi D.	Administration	Dean of Admissions	210	Wexler Hall	4-2	R	OP
Louvell, Margaret A.	Administration	Admissions Clerk	310	Fremont Hall	5-7	R	OP

Step 8:
Once the report is configured to meet the requirements it can be saved as a new, customized instance of the initial base report. The base report will continue to exist in its original state and the new report will appear in the list of available reports. Select Edit Report from the top of the Report Details screen.

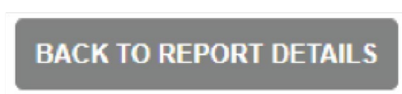
The Edit Report window appears. Change the **Report Name** field to give the configured report a unique name. The **Description** can be changed, though it is advisable to leave the base report name in this field to easily determine the base report that served as the template for the custom report. **Availability** can be **Public** or **Private** based on the radio button selection. A **Public** report is available to all users; a **Private** report is available to the user who creates it. Select **Save Report Format** to complete creation of the custom report. **Cancel Report** will close the Report Details screen and not save the configuration made.



Exporting and Printing Reports

Reports can be viewed or made available in the following ways. Selecting each action from the top of the Report Details screen will produce the results described below.

Print: Paper printout of the report. Note that paper printouts will not include grid lines separating rows and columns. Once the report prints (or the print command is canceled) the print version of the report completely occupies the browser page. The user returns to Keystone Web by selecting **Back to Report Details** in the upper-right corner of the page.



Print Preview: Opens the report in a separate window for review. This view-only window can be closed by selecting the "**X**" in the window's upper-right corner.

Export to PDF: Exports the report in PDF format.

Export to Excel: Exports the report to an Excel Workbook.

8 Cabinets and Hooks

Cabinets and Hooks

This chapter describes the following items and actions:

- Cabinets and Hooks Overview
- Creating Cabinets and Hooks
- Issuing New Items to Cabinets and Hooks
- Transferring Existing Items to Cabinets and Hooks
- Returning Items to Cabinets and Hooks

Cabinets and Hooks Overview

Cabinets in Keystone Web are storage locations for Cores, Keys, Keyrings, and Parts (collectively called Items). Hooks are individual storage areas within a Cabinet, identified by Hook Numbers or, if desired, a combination of Names and Hook Numbers. The structure is modeled on traditional key cabinets that commonly have panels of individually-numbered hooks on which keys or keyrings are stored. In Keystone Web, however, Cabinets and Hooks can be used to represent any organized storage space, where individual Items can be in the storage unit generally (i.e. the Cabinet) and specifically reside in an identifiable section of the storage unit (i.e. Hooks).

All Items stored in a Cabinet must reside on a Hook. The Cabinet is the collective storage space, but no Item can be stored simply within a Cabinet. Hooks do not have limits for storage. A cabinet can have one Hook with many Items stored on it or many hooks with one Item per Hook, all according to the organization required.

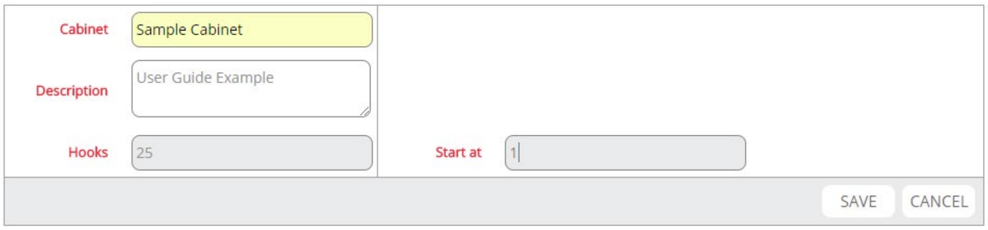
Creating Cabinets and Hooks

Hooks are subordinate to Cabinets, so a Cabinet must be created first. Users access Cabinets by the following path: Home > Tools > Cabinets.

Creating Hooks While Creating a Cabinet

Step 1:
From the Manage Cabinets screen, select Add Cabinet.

Step 2:
Enter the Cabinet name and a Description (if needed). This initial setup action allows for creation of all the Hooks in the cabinet. Enter the number of Hooks required in the Hooks field and the starting numerical ID (or, Hook Number) of the Hooks in the Start at field. Select Save to complete the Cabinet setup. Keystone Web will create the Cabinet record and a record for each Hook specified. The Hooks are numbered, starting with the Hook Number entered in the Start at field during Cabinet setup and continuing sequentially for the total number of Hooks. In the example below, twenty-five Hooks are required for the new Sample Cabinet, with a starting Hook Number of 1, so twenty-five Hooks will be created, individually named 1 to 25.



Note:

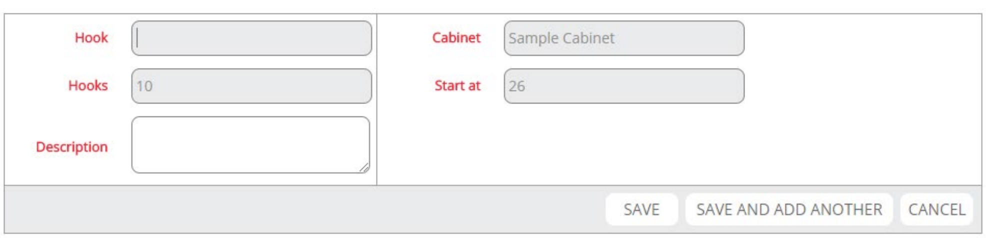
- Cabinets can be created without Hooks if the need arises, but at least one Hook must be added to the Cabinet later to store Items in the Cabinet.
- The Start at field accepts numbers only. If the Hooks need to include a name in addition to a number, see the next section: Creating Hooks After Creating a Cabinet.

Creating Hooks After Creating a Cabinet

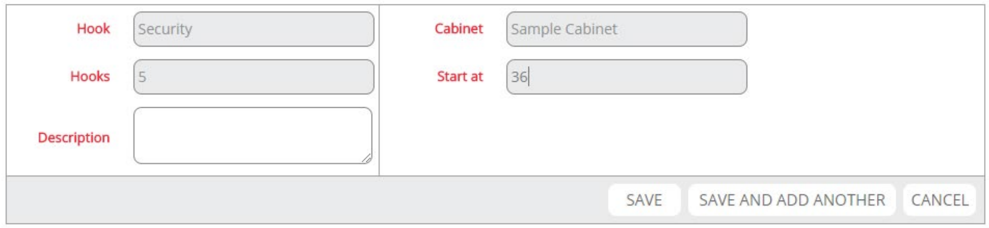
After a Cabinet has been set up, additional Hooks can be created from the Hooks screen. Users access the Hooks screen by the following path: Home > Tools > Hooks.

Step 1:
From the Manage Hooks screen, select Add Hook.

Step 2:
Adding Hooks from the Hook screen allows for a group name in addition to Hook Numbers for each Hook. If the new Hooks only need Hook Numbers to identify them, leave the Hook field blank (see step 3 below if a group name is needed). Select the Cabinet field to display a list of Cabinets on record and select a Cabinet from the list to populate the field. Enter into the Hooks field the total number of Hooks needed and enter the first Hook Number for the new Hooks in the Start at field. In the example below, ten new Hooks will be added to the Sample Cabinet and will be individually named 26 to 35.



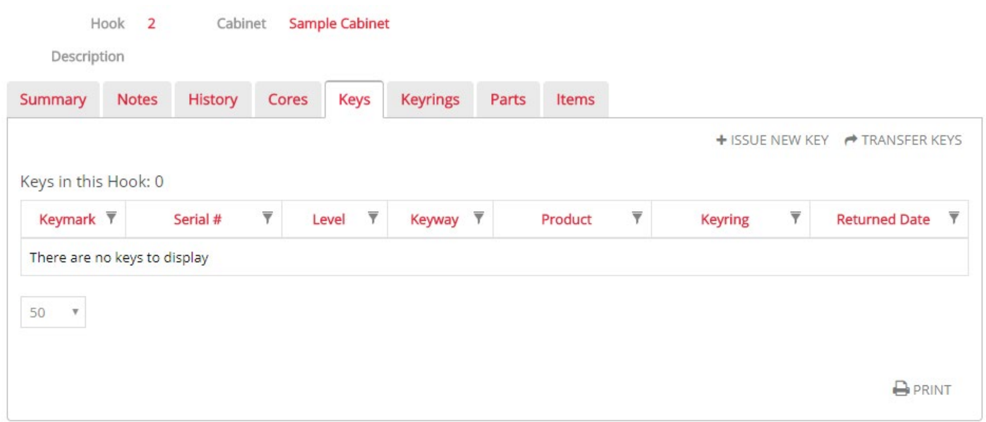
Step 3:
A group name can be created when adding Hooks from the Hook screen. The group name will precede each new Hook number. In the example below, five new Hooks will be added to the Sample Cabinet and will be individually named Security36 to Security40.



Issuing New Items to Cabinets and Hooks

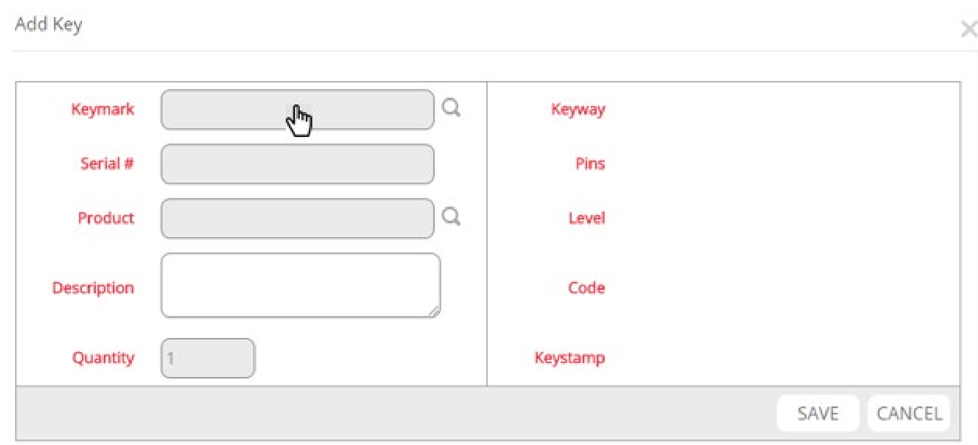
Items are issued for Cabinets only by means of a Hook in the Cabinet, so the process of issuing a new Item occurs at the designated Hook record in the Cabinet where the new Item will be stored.

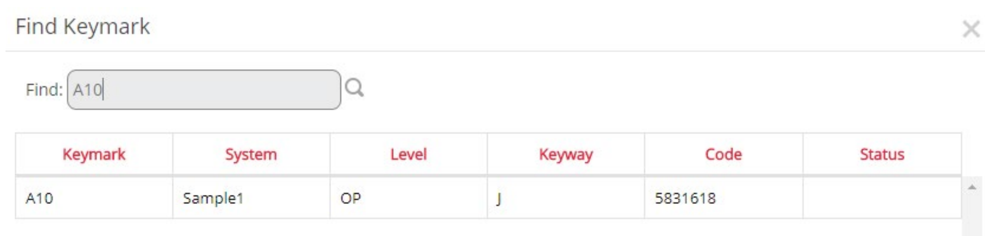
Step 1:
Navigate to the Hooks Screen (Home > Tools > Hooks) and select the detail tab for the correct Item type (Cores, Keys, Keyrings, Parts). In this example, the Keys detail tab has been selected.



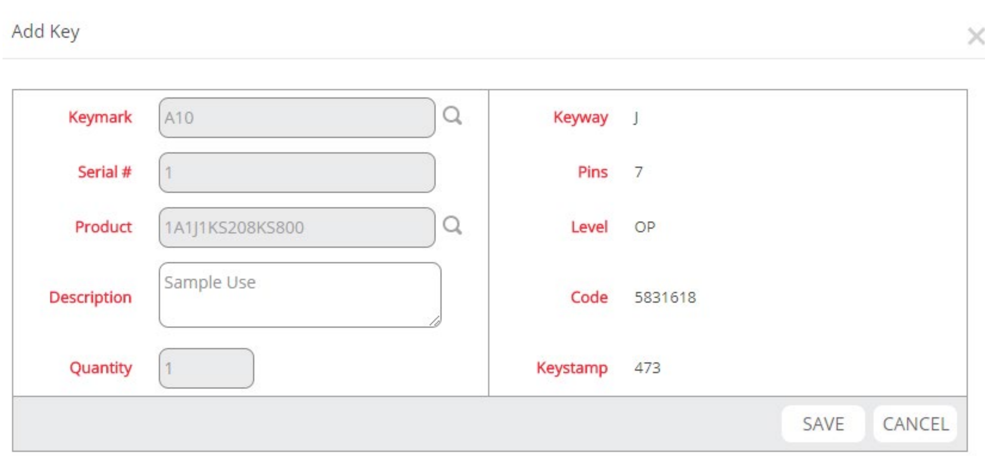
Step 2:
Select Issue New Key. Note that in every detail tab, the Item name changes for this command (Issue New Core, Issue New Keyring, Issue New Part).

Step 3:
The Add Key window appears. Select the **Keymark** field (first image below) to open the Find Keymark window (second image below) and enter the keymark of the intended new key and then press **Enter** to find the keymark. In the example below, keymark A10 was found. Selecting A10 in the search results grid populates it in the Add Key window (see Step 4).





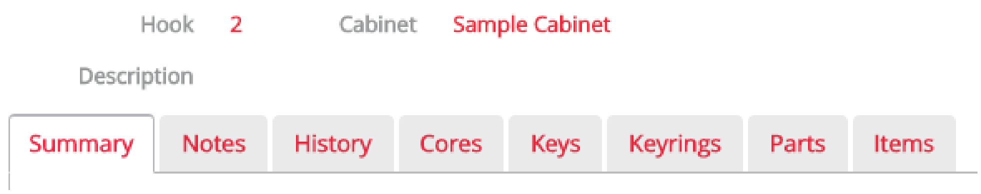
Step 4:
Returning to the Add Key window with A10 now populated in the **Keymark** field, the **Serial #** field will automatically populate with the correct serial number if key serialization has been set to Mandatory in the Serialization Config screen (**Home** > **Settings** > **Serialization Config**). See the Note under the image below for additional information about the **Serial #** field. Complete the **Product** field if required by selecting the field, locating the correct Product from the Find Product list, and selecting it. Complete the **Description** field if required and then change the **Quantity** field if more than one A10 key is required. In the example below, one A10 key will be created and stored on Hook 2. It will be serialized # 1, will have a Product association of "1A1J1KS208KS800," and will carry a description of "Sample Use."



> Note: Key serialization settings can be configured in the Serialization Config screen (Home > Settings > Serialization Config). If key serialization has been set to Always Blank, nothing appears in the Serial # field when a key is issued. If key serialization has been set to Optional the Serial # field will automatically populate with the next available serial number per Keymark, but it can be modified by clearing the number provided and entering a new one. If key serialization has been set to Mandatory, Keystone Web keeps track of the serial numbers per Keymark and the serial number of a key being issued cannot be modified.

Step 5:
Select Save to complete the new key creation and storage on Hook 2 in the Sample Cabinet.

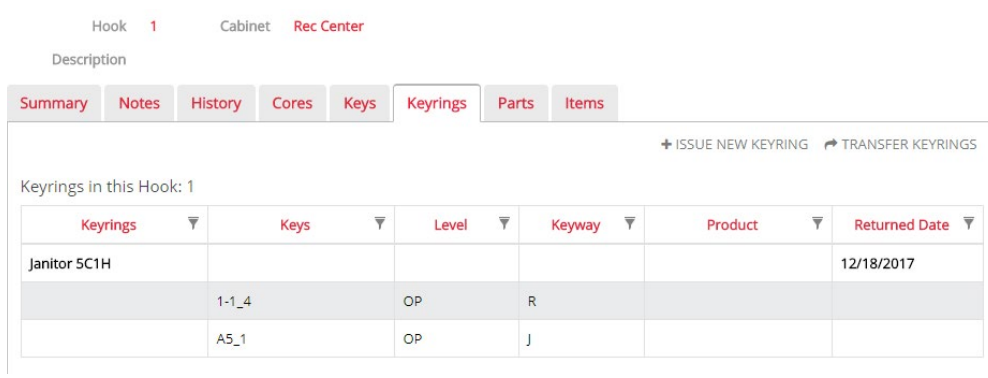
> Note: Other Items (Keyrings, Cores, Parts) can be created and stored on Hooks in Cabinets by following the steps above after selecting the appropriate detail tab of the Hook record.



Transferring Existing Items to Cabinets and Hooks

Items stored on Hooks in Cabinets are eligible for transfer. If items stored on Hooks in Cabinets need to be installed on a door or issued to a person, those actions are performed from the individual Door or People records. Transfers can be from one Hook to another inside the same Cabinet, to a new Hook and Cabinet, to the Unassigned screen, or to the Out of Service screen (comprised of the dispositions "Lost," "Stolen," and "Destroyed").

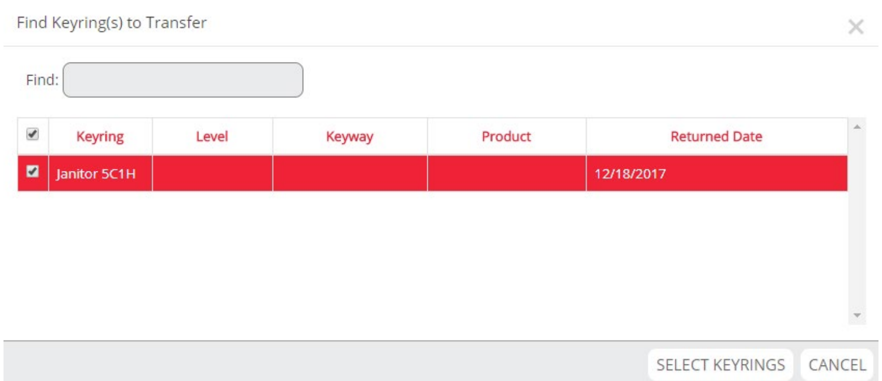
Step 1:
Navigate to the Hook where the item is currently stored. In this example, Hook 1 in the Rec Center Cabinet holds a Keyring called "Janitor 5C1H" with two keys attached (Key 1-1, serialized #4 and Key A5, serialized #1).



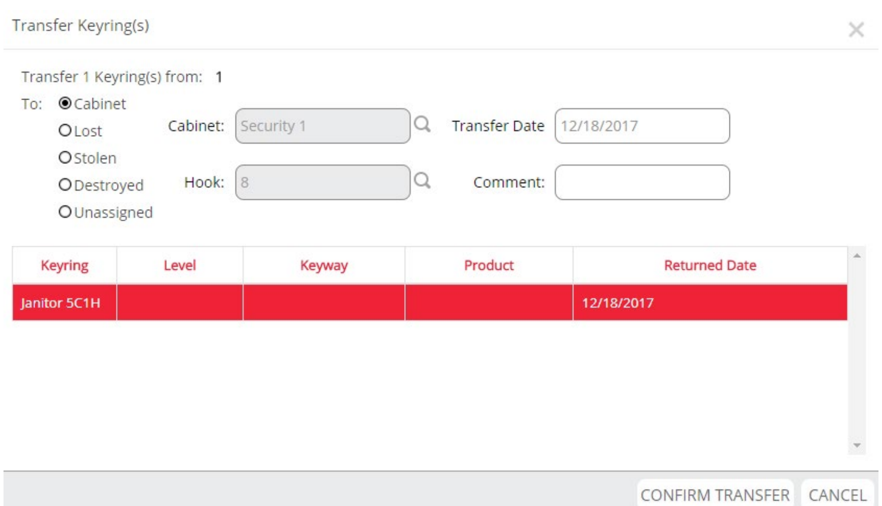
Keyrings	Keys	Level	Keyway	Product	Returned Date
Janitor 5C1H					12/18/2017
	1-1_4	OP	R		
	A5_1	OP	J		

Step 2:
Select Transfer Keyrings.

Step 3:
The "Find Keyring(s) to Transfer" window appears. If there is only one keyring on the Hook it will automatically be selected. If there are two or more keyrings on the Hook, select the keyring(s) intended for transfer. If needed, the keyring name can be entered in the **Find** field to narrow the list of keyrings. With the intended keyring(s) highlighted, select **Select Keyrings**.



Step 4:
Choose the new disposition intended for the Keyring with the radio button options in the "To" list. If the Cabinet radio button is selected, the **Cabinet** and **Hook** fields are required to designate the exact destination. In this example, Keyring "Janitor 5C1H" is being transferred to Hook 8 of the "Security 1" Cabinet. The **Transfer Date** field can be modified to a date in the past if required and a **Comment** can be added, which will be stored in the History of the Keyring.

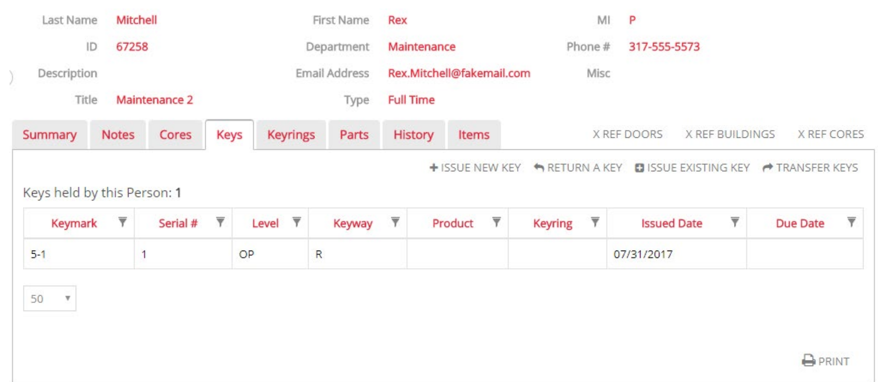


Step 5:
Select **Confirm Transfer** to complete the action.

Returning Items to Cabinets and Hooks

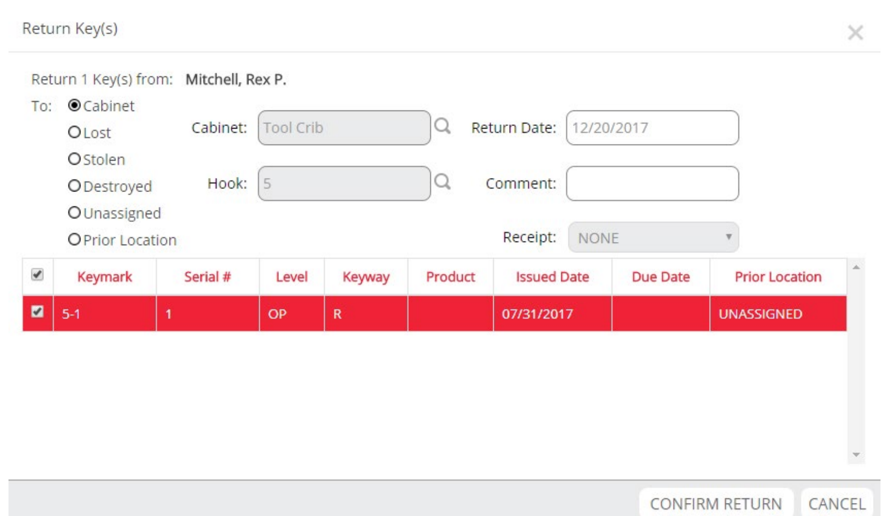
Items can be returned from Doors and People. Returned items are sent to the Unassigned screen, the Out of Service screen (comprised of the dispositions “Lost,” “Stolen,” and “Destroyed”), or to a Hook on a Cabinet.

Step 1:
Navigate to the Door or People record to which the item is currently assigned. In this example, the 5-1 Key, Serial # 1, is being returned from Rex Mitchell. Select Return A Key to start the return process.



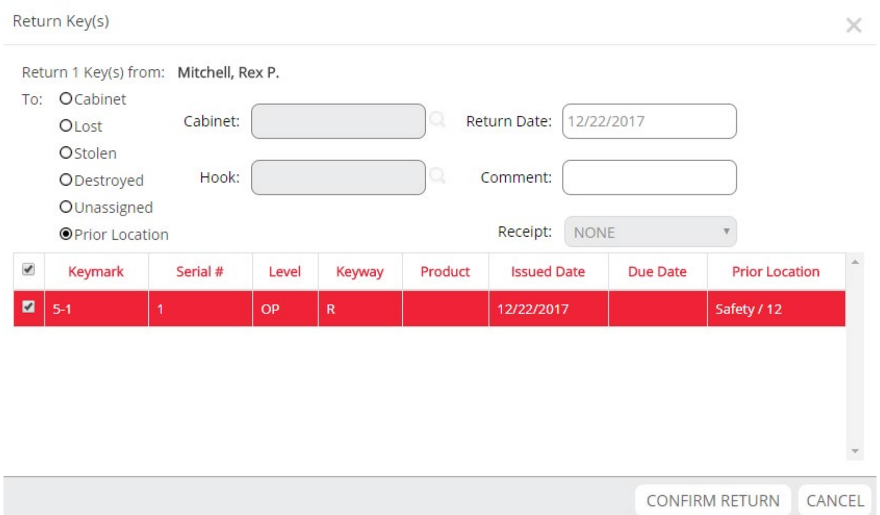
Step 2:
The Return Key(s) window appears. If there is only one key held by the person it will automatically be selected. If there are two or more keys, select the key(s) intended for return.

Step 3:
Choose the new disposition intended for the Keyring with the radio button options in the “To” list. If the Cabinet radio button is selected, the Cabinet and Hook fields are required to designate the exact destination. A Comment can be added about the return, which will be stored in the History of the key. A return Receipt can also be printed if required (see the Settings chapter in this User Guide for more details). In the example below, the 5-1 Key, Serial # 1 is sent to Hook 5 in the “Tool Crib” Cabinet.



Step 4:
Select Confirm Return to complete the action.

> Note: The Prior Location radio button option for returns will put the item in the place where it was stored immediately prior to the disposition from which it is currently being returned, which could be any eligible disposition, including a person. In the example below, the 5-1 Key, Serial # 1 had previously been on Hook 12 of the Safety Cabinet, so it will return to this disposition by choosing the Prior Location radio button, thus eliminating the need to choose the Cabinet radio button and then specify the Hook/Cabinet for return. Refer to the Prior Location column on the far right of the grid in this image and note that it is populated with the disposition to which the key will return if the Prior Location radio button is selected.



9 Keyrings

Keyrings

This chapter describes the following items and actions:

Keyrings Overview

Creating Keyrings

- From the Manage Keyrings Screen
- From a People Record
- From a Hook in a Cabinet

Issuing Keyrings

Transferring Keyrings

- Transferring Keyrings to People
- Transferring Keyrings to Hooks

Returning Keyrings

Modifying Keyrings

- Edit Keyring ID and Description
- Attach New Key
- Attach Existing Key

Keyrings Overview

Keyrings are devices that keys can be attached to so that the keys can be stored, issued, and used as a single unit. In Keystone Web, Keyrings are presented as a single record comprised of subordinate individual key records. The primary identification of a Keyring is the Keyring ID, a unique name applied to each Keyring record. Keyrings can be issued to People, stored on a Hook in a Cabinet, or stored in the Unassigned screen.

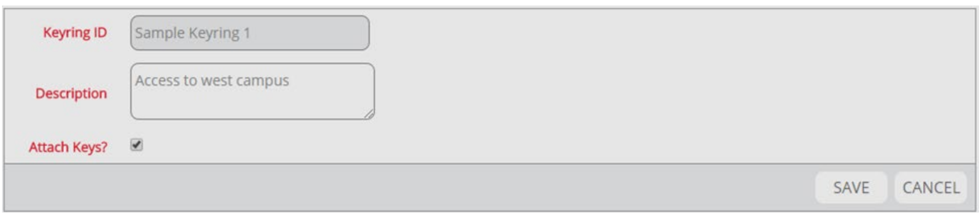
Creating Keyrings

Keyrings are created from the Manage Keyrings screen, from the People record of the person to whom the Keyring is issued, or from a Hook in a Cabinet.

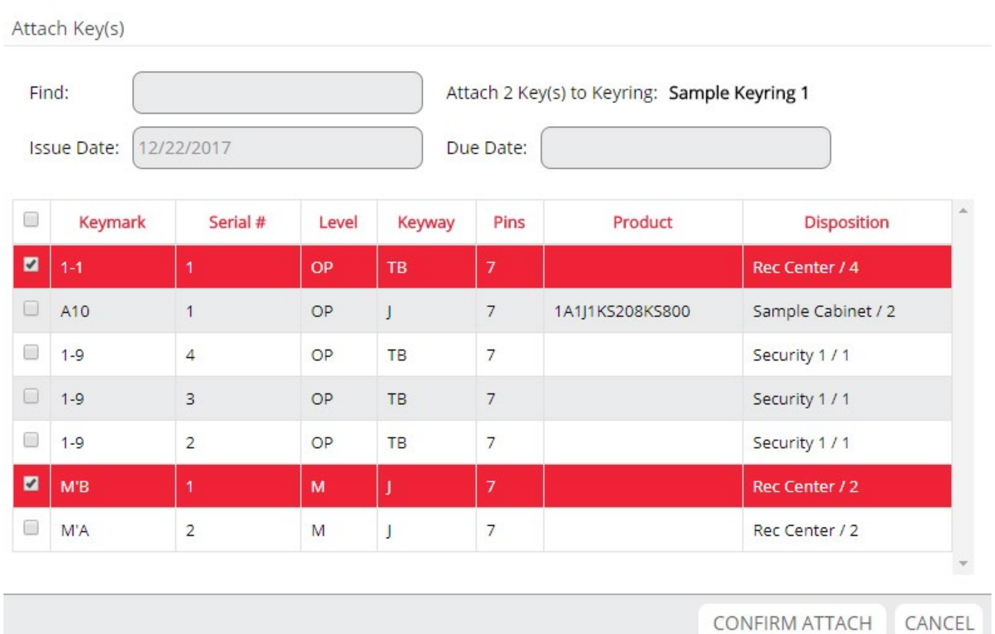
From the Manage Keyrings Screen

Step 1:
Navigate to the Manage Keyrings screen (Home > Tools > Keyrings) and select Add Keyring.

Step 2:
The Add Keyring screen appears. Enter a Keyring ID, which can be letters, numbers, and special characters. Add a Description if desired. Select the Attach Keys? checkbox to attach keys to the Keyring.



Step 3:
The Attach Key(s) window appears, showing a list of all keys that are eligible for attaching. Keys are eligible for attaching if they are in a disposition other than issued to a person (i.e. keys on a Hook in a Cabinet or in the Unassigned screen). Select the key(s) intended for attaching to the Keyring, using the Find field if needed. Multiple key selections can be made by selecting the checkbox of each key. If the required keys are listed without separation, select the first key, press and hold Shift, and select the last key in the sequence. This action will select the entire range of keys between the two that you selected. Lastly, the checkbox in the upper-left of the grid will select the entire list of keys. In the example below, one 1-1 key, serialized # 1 and one M'B key, serialized # 1 will be attached to Sample Keyring 1.



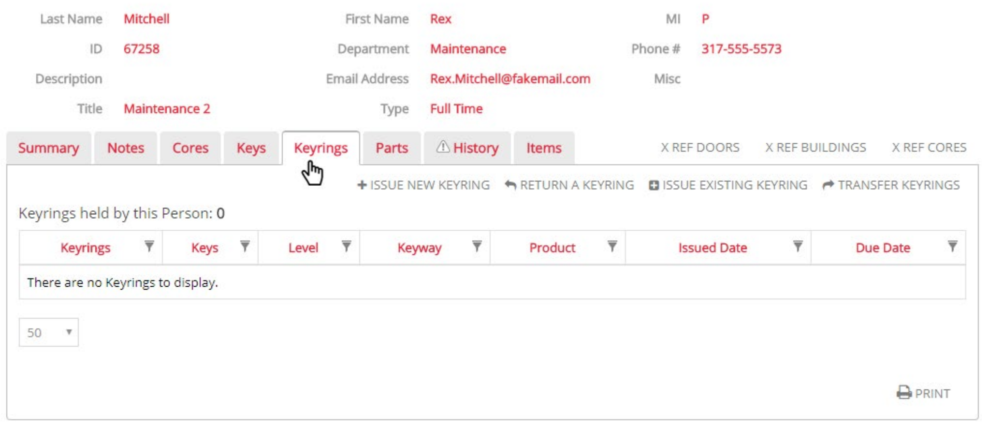
Keymark	Serial #	Level	Keyway	Pins	Product	Disposition
1-1	1	OP	TB	7		Rec Center / 4
A10	1	OP	J	7	1A1J1KS208KS800	Sample Cabinet / 2
1-9	4	OP	TB	7		Security 1 / 1
1-9	3	OP	TB	7		Security 1 / 1
1-9	2	OP	TB	7		Security 1 / 1
M'B	1	M	J	7		Rec Center / 2
M'A	2	M	J	7		Rec Center / 2

Step 4:
Select Confirm Attach to complete the action.

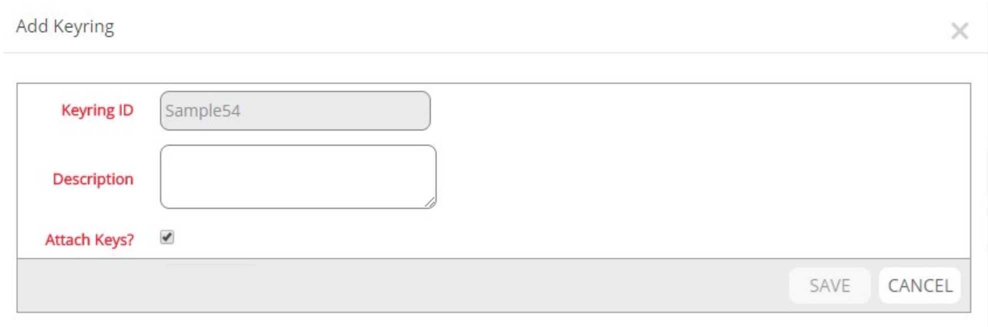
From a People Record

Step 1:
Navigate to the People record for the person to whom the Keyring will be issued and select the Details action button.

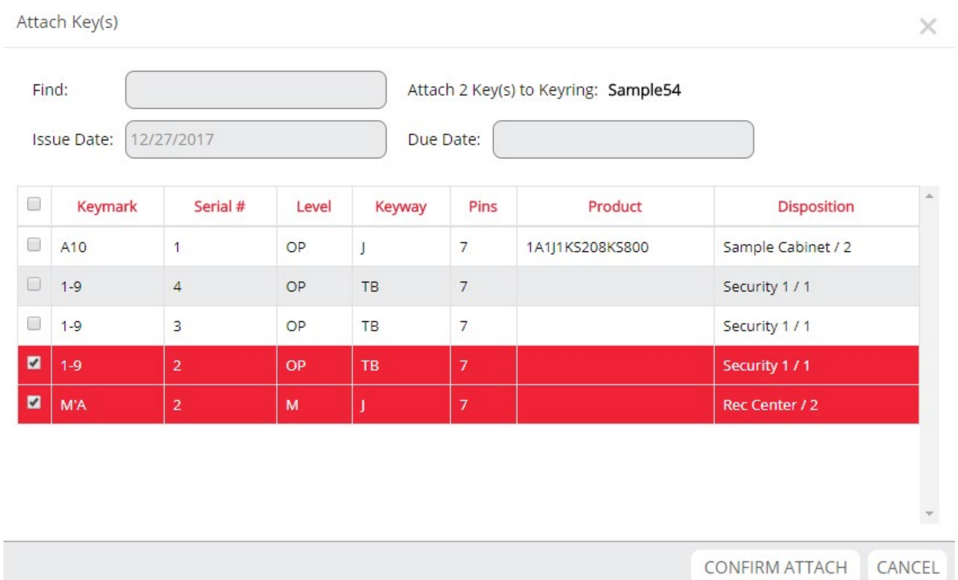
Step 2:
Once inside the correct People record, select the Keyrings detail tab and then select Issue New Keyring. In this example, a new Keyring will be created and simultaneously issued to Rex Mitchell.



Step 3:
The Add Keyring window appears. Enter the new Keyring ID and a Description (if desired) and then put a check in the Attach Keys? box.



Step 4:
The Attach Key(s) window appears, showing a list of all keys that are eligible for attaching. Keys are eligible for attaching if they are in a disposition other than issued to a person (i.e. keys on a Hook in a Cabinet or in the Unassigned screen). Select the key(s) intended for attaching to the Keyring, using the **Find** field if needed. In the example below, one 1-9 key, serialized # 2 and one M'A key, serialized # 2 will be attached to the Sample54 Keyring.

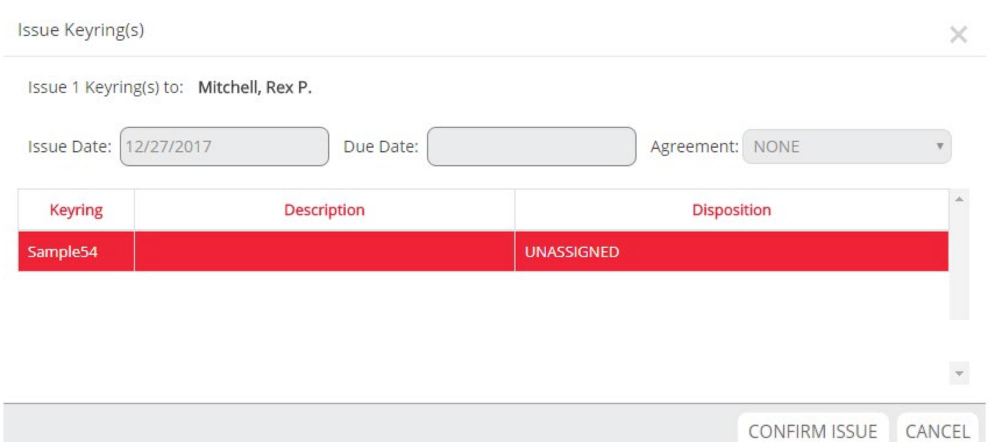


	Keymark	Serial #	Level	Keyway	Pins	Product	Disposition
☐	A10	1	OP	J	7	1A1J1KS208KS800	Sample Cabinet / 2
☐	1-9	4	OP	TB	7		Security 1 / 1
☐	1-9	3	OP	TB	7		Security 1 / 1
☑	1-9	2	OP	TB	7		Security 1 / 1
☑	M'A	2	M	J	7		Rec Center / 2

Step 5:
Select **Confirm Attach** to attach the selected keys to the new Keyring.

Step 6:
With the keys attached, the Add Keyring window reappears. Select **Save** to complete the creation of the Keyring.

Step 7:
The Issue Keyring(s) window appears, showing the newly-created Keyring and the person to whom it will be issued. If needed, change the **Issue Date** to a date in the past, add a **Due Date**, and select an **Agreement** for the use of the Keyring. Note that these modifications are not required.



Keyring	Description	Disposition
Sample54		UNASSIGNED

Step 8:
Select **Confirm Issue** to complete the action.

From a Hook in a Cabinet

Follow the steps in the above section, "From a People Record" to create a Keyring from a Hook in a Cabinet, noting the following differences:

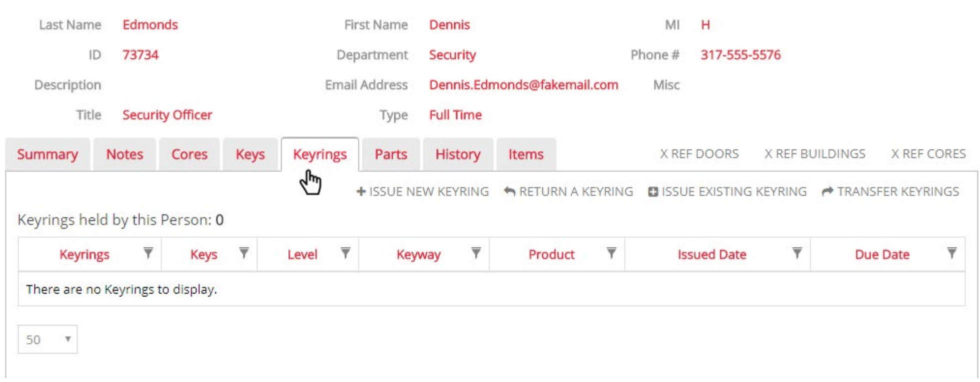
- Select an individual Hook in a Cabinet instead of a People record to initiate the process.
- No Agreement can be applied when creating a Keyring from a Hook in a Cabinet.

Issuing Keyrings

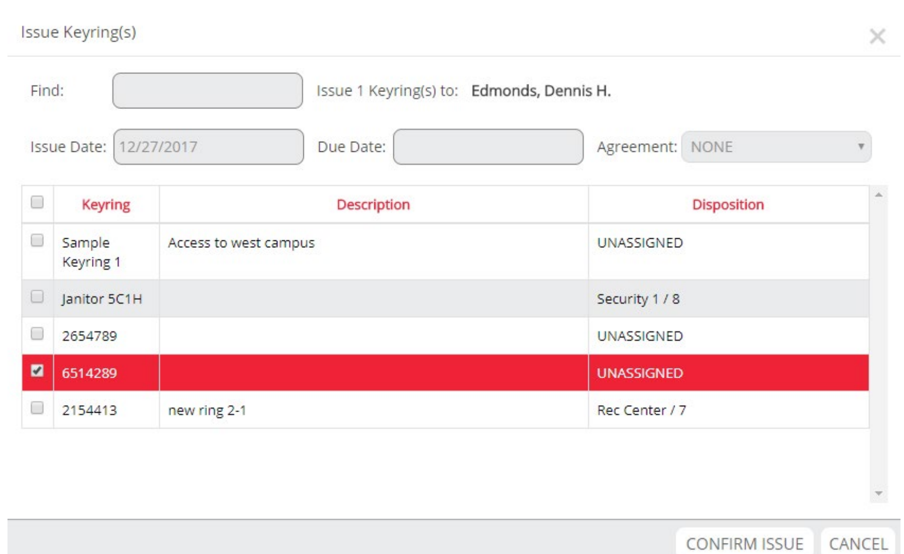
Existing Keyrings can be issued to People from the Unassigned screen or from a Hook in a Cabinet (new Keyrings can also be created during the process of issuing them to a person, as noted in the previous section, "Creating Keyrings").

Step 1:
Navigate to the People record for the person to whom the existing Keyring will be issued and select the Details action button.

Step 2:
Once inside the correct People record, select the Keyrings detail tab and then select Issue Existing Keyring. In this example, an existing Keyring will be issued to Dennis Edmonds.



Step 3:
The Issue Keyring(s) window appears, showing a list of all keyrings that are eligible for issue. Keyrings are eligible for issue if they are in a disposition other than issued to a person (i.e. keyrings on a Hook in a Cabinet or in the Unassigned screen). Select the keyring(s) intended for issue to the person, using the Find field if needed. In this example, Keyring 6514289 is selected for issue to Dennis Edmonds. If needed, change the Issue Date to a date in the past, add a Due Date, and select an Agreement for the use of the Keyring. Note that these modifications are not required.



Step 4:
Select Confirm Issue to complete the action.

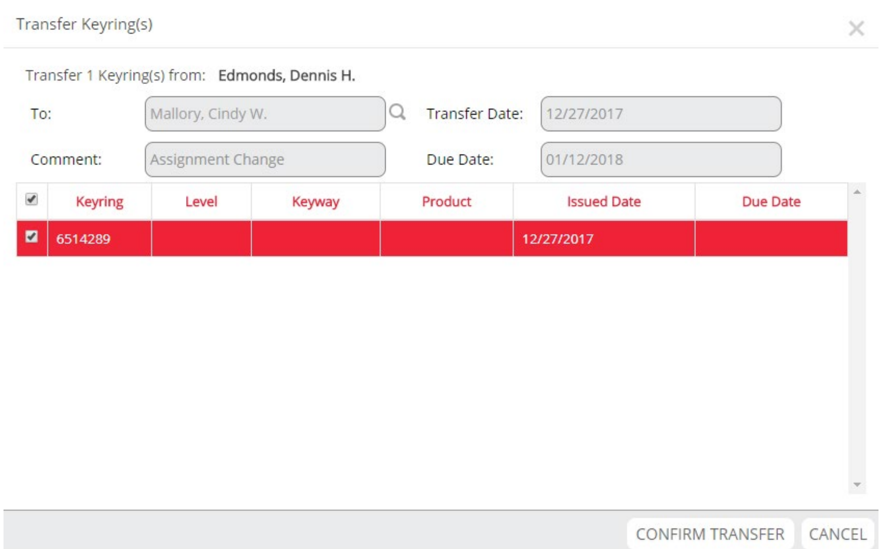
Transferring Keyrings

Transferring Keyrings to People

Step 1:
Navigate to the People record where the Keyring is currently located and select the Details action button.

Step 2:
Once inside the record, select the Keyrings detail tab and then select Transfer Keyrings.

Step 3:
The Transfer Keyring(s) window appears. Confirm that the intended Keyring is highlighted and select the Find field to locate the People record to whom the Keyring is being transferred. If desired, add a Comment, change the Issue Date to a date in the past, and add a Due Date. In the example below, Keyring 6514289 is being transferred from Dennis Edmonds to Cindy Mallory.



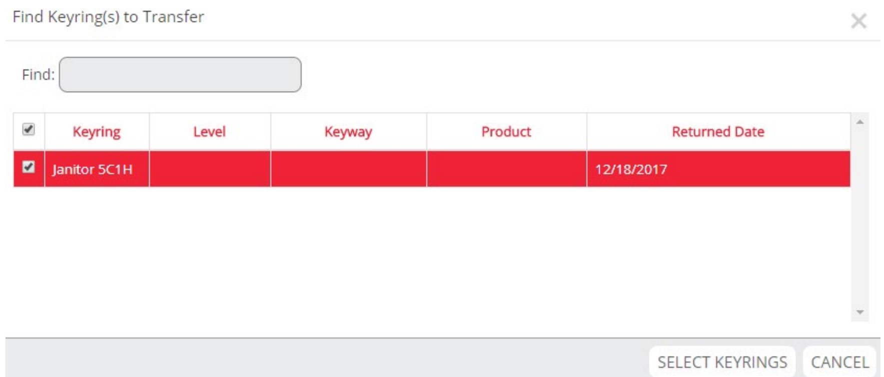
Step 4:
Select Confirm Transfer to complete the action.

Transferring Keyrings to Hooks

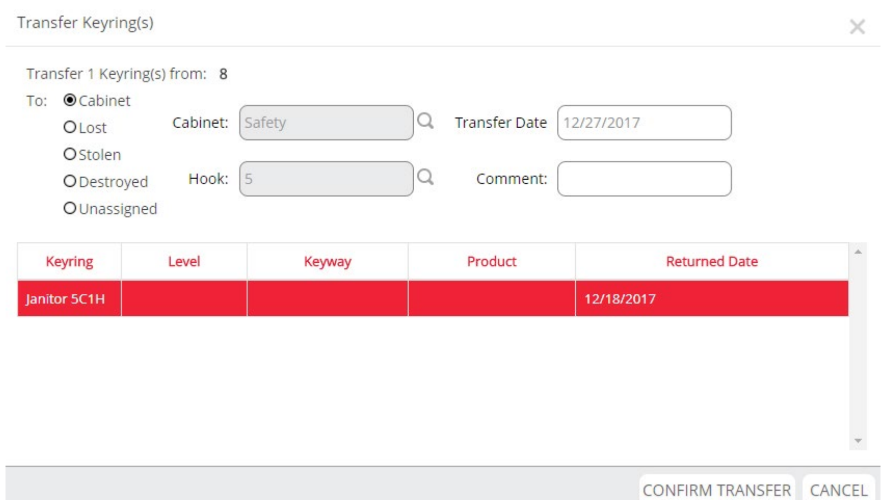
Step 1:
Navigate to the Hook record where the Keyring is currently located and select the Details action button.

Step 2:
Once inside the record, select the Keyrings detail tab and then select Transfer Keyrings.

Step 3:
The Find Keyring(s) to Transfer window appears. Confirm that the intended Keyring is highlighted, using the **Find** field if needed, and then select **Select Keyrings**. In this example, Keyring Janitor 5C1H is selected for transfer.



Step 4:
Choose the new disposition from the radio button options (Cabinet, Lost, Stolen, Destroyed, Unassigned). If desired, change the **Transfer Date** to a date in the past and add a **Comment**. In the example below, Keyring Janitor 5C1H is transferring to Hook 5 of the Safety Cabinet.



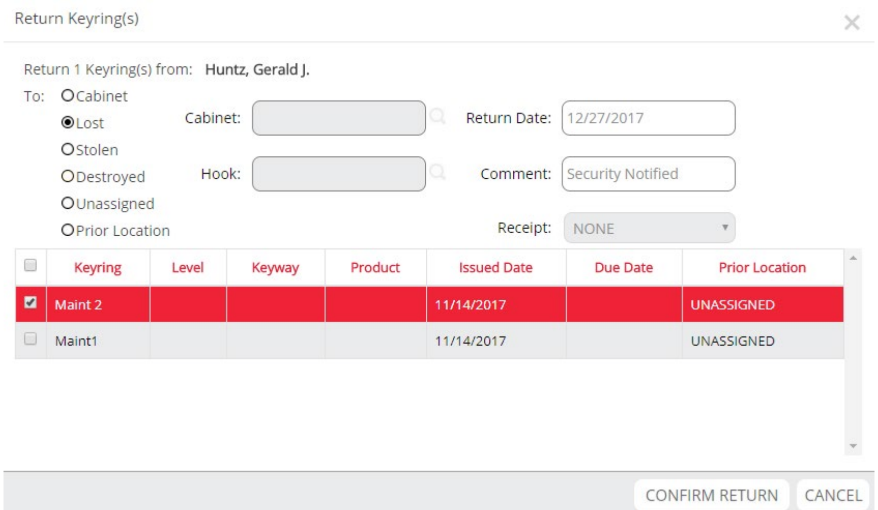
Note: The Transfer process described above is used to move Keyrings from a Hook to an Out of Service disposition (Lost, Stolen, Destroyed).

Returning Keyrings

Step 1:
Navigate to the People record where the Keyring is currently located and select the **Details** action button.

Step 2:
Once inside the record, select the **Keyrings** detail tab and then select **Return a Keyring**.

Step 3:
The Return Keyring(s) window appears. Select the Keyring(s) intended for return and then choose the new disposition from the radio button options (Cabinet, Lost, Stolen, Destroyed, Unassigned, Prior Location). If desired, change the Return Date to a date in the past, add a Comment, and select a Receipt for the transaction. In the example below, Keyring Maint 2 is being returned from Gerald Huntz and reported as lost, with a comment that the Security department has been notified.



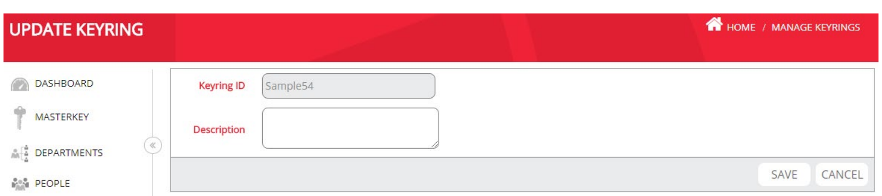
Step 4:
Select Confirm Return to complete the action.

Modifying Keyrings

Edit Keyring ID and Description

Step 1:
Navigate to the intended Keyring record and select the Edit action button.

Step 2:
The Update Keyring screen appears. Modify the Keyring ID and Description as needed. Select Save or Cancel to keep or discard changes.



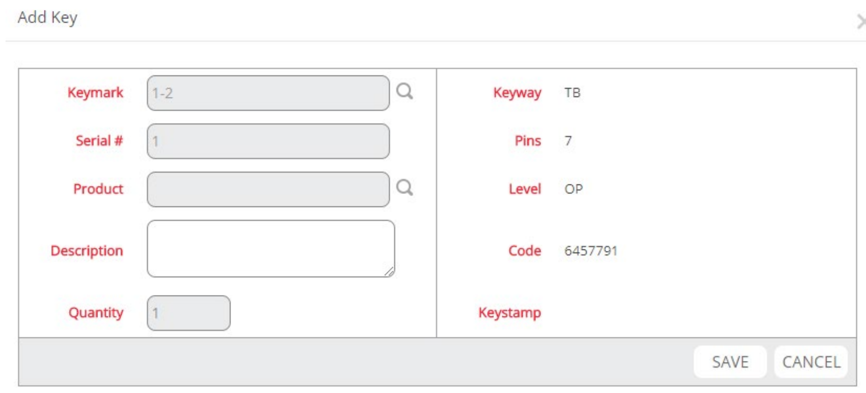
Attach New Key

Step 1:
Navigate to the intended Keyring record and select the Details action button.

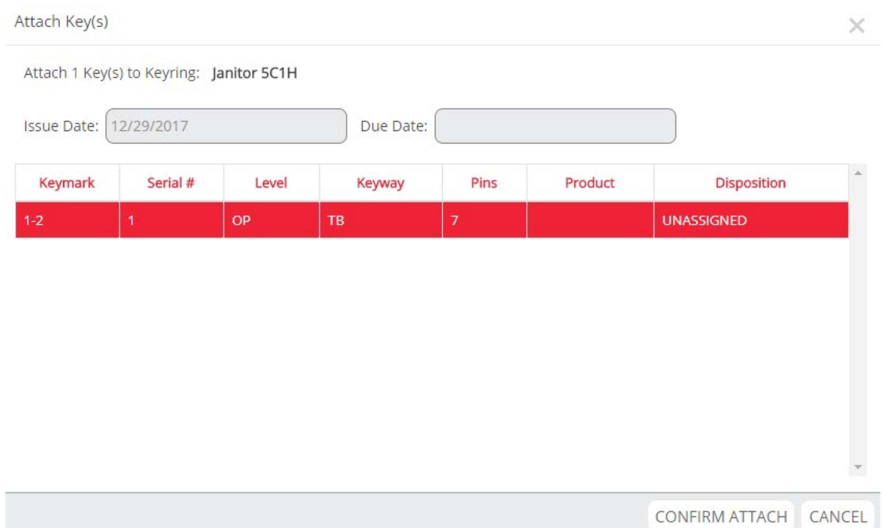
Step 2:
In the Keys detail tab, select the Attach New Key button.

+ ATTACH NEW KEY

Step 3:
The Add Key screen appears. Select the **Keymark** field and choose the Keymark of the new key. Modify the **Serial #**, **Product**, **Description**, and **Quantity** fields if needed and then select **Save**. In the example below, a 1-2 key, serialized # 1 is being added.



Step 4:
The Attach Key(s) screen appears. If desired, change the **Issue Date** to a date in the past and add a Due Date.



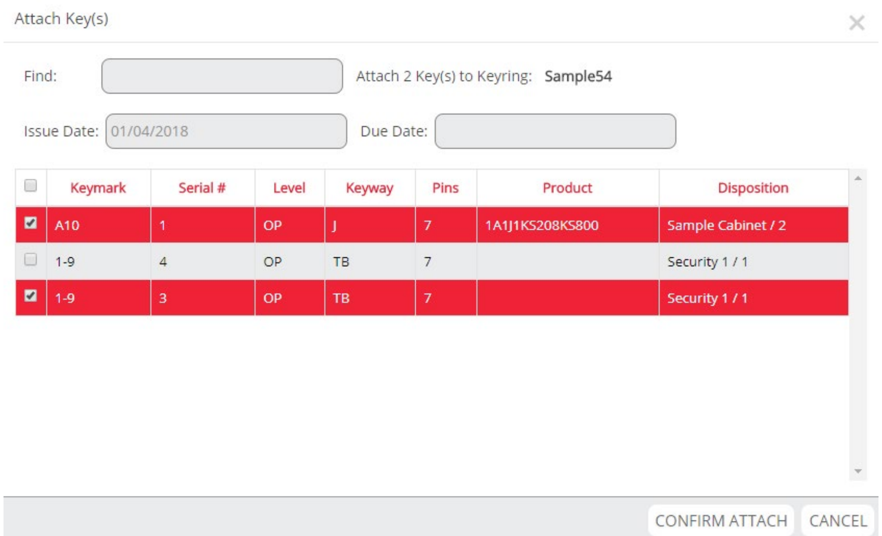
Step 5:
Select **Confirm Attach** to complete the action.

Attach Existing Key

Step 1:
Navigate to the intended Keyring record and select the **Details** action button.

Step 2:
In the Keys detail tab, select the **Attach Existing Key** button.

Step 3:
The Attach Key(s) window appears, showing a list of all keys that are eligible for attaching. Select the key(s) intended for attaching to the Keyring, using the **Find** field if needed. In the example below, one 1-9 key, serialized # 3 and one A10 key, serialized # 1 will be attached to the Sample54 Keyring.



Step 4:
Select **Confirm Attach** to complete the action.

10 Administration

Administration

This chapter describes the following items and actions:

- Administration Overview
- Activity Log
- Maintain List
- Manage Locations
- Manage Users
- Set Password Rule
- Alerts

Administration Overview

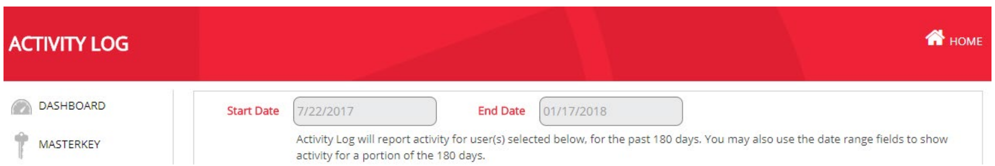
The Administration section of Keystone Web is comprised of five subsections: Activity Log, Maintain List, Manage Locations, Manage Users, and Set Password Rule. This section is only available to Administrative-level users ("Admins" in the software), as it provides configuration options for the entire application, along with viewing the activity of all users and creating new users. In addition to the Administration section, this chapter also describes the Alerts screen, where Administrative-level users can manage Items due.

Activity Log

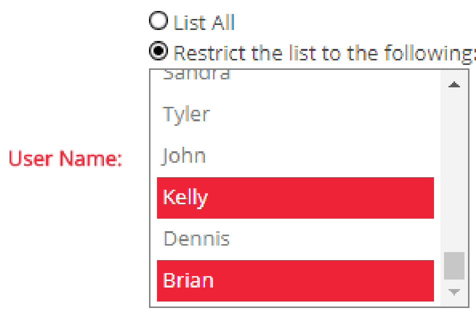
The Activity Log lists actions taken in the software by users. Activity Logs are generated by Location, so if a user has access to more than one Location an Activity Log for each Location would be necessary to account for all the activity of the user. Locations can be changed by selecting from the Location drop-down list in the top-center of the user interface.

Administrators access the Activity Log by the following path: Administration > Activity Log.

Step 1:
Select the Start Date and End Date to define the period for which activity data is required. Note that these fields will automatically populate to the maximum period of 180 days, but they can be adjusted to any period less than the maximum.



Step 2:
Select the User(s) whose activity should be included in the log by using the List All/Restrict radio button choices. The default selection is List All, which will generate the activity for all Keystone Web users. Restrict the list to the following allows for choosing one or many from the list of users. In the example below, Kelly and Brian are selected for the Activity Log by selecting Kelly and then selecting Brian while pressing the Ctrl key (the Shift key can be used to select a range of names).



Step 3:
Select Print, Export to Excel, or Cancel to complete the action. Print provides a paper print out of the data. Export to Excel populates a new spreadsheet with the data.

Maintain List

Keystone Web contains drop-down lists for common aspects of individual records, such as Door Types, Keyways, and Titles for People. These lists appear during the creation of individual records in various screens like People and Doors. The intent is to save time during new record creation by selecting data from the list rather than entering the data. Additionally, the lists can reduce variations of a single data point that naturally occur when multiple users enter information, for example the People Title "Finance Manager" might be entered as "Fin. Manager," "Finance Mgr.," etc., making some actions like filtering by Title or sorting reports by Title more difficult.

Lists can be built as data entry occurs. For example, if a user is adding a new Door and enters "Fiberglass" as the Door Type, Fiberglass will appear in the Door Type drop-down list for all subsequent Door record creation. Alternatively, the Maintain List submenu allows the Administrator to build content at one time for any of the drop-down lists. Administrators access the Maintain List submenu by the following path: Administration > Maintain List. Within the submenu are seven screens, one for each manageable List: People Types, People Titles, Door Types, Facility Zones, Keymark Status, Keyways, and Product Manufacturer.

There are three actions available in all seven screens: add a new entry, edit an existing entry, and purge an entry. Door Types will be used to illustrate how these actions are accomplished in all Maintain List screens.

Step 1:
To make a new entry, select Add Door Type. Enter the new Door Type and select Save.

Step 2:
To edit an existing record select Edit this Door type from the Actions column of the Manage Door Types screen on the row of the intended Door Type. Edit the Door Type and select Save.

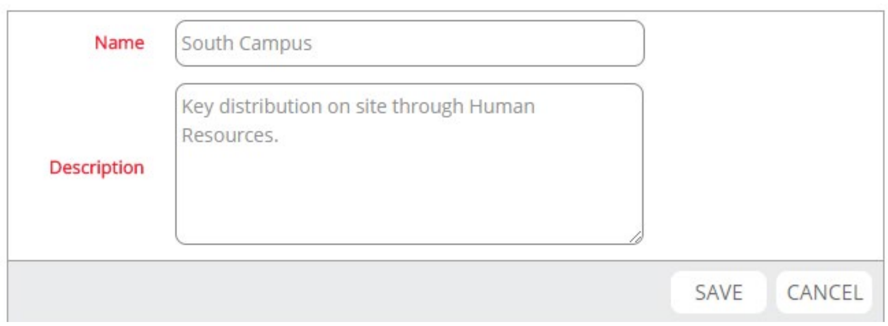
Step 3:
To purge a record select Purge this Door type from the Actions column of the Manage Door Types screen on the row of the intended Door Type. Note that Door Types cannot be purged if they are in use. Additionally, in some Maintain List screens, certain entries are static, i.e. read-only samples provided with the software, and cannot be purged.

Manage Locations

Locations are subsections of Keystone Web data that provide multi-site security management with independence between each site. See the next section ("Manage Users") for information about restricting users to specific Locations.

There are four actions available in Manage Locations: add a new Location, edit an existing Location, purge a Location, and access the details of a Location.

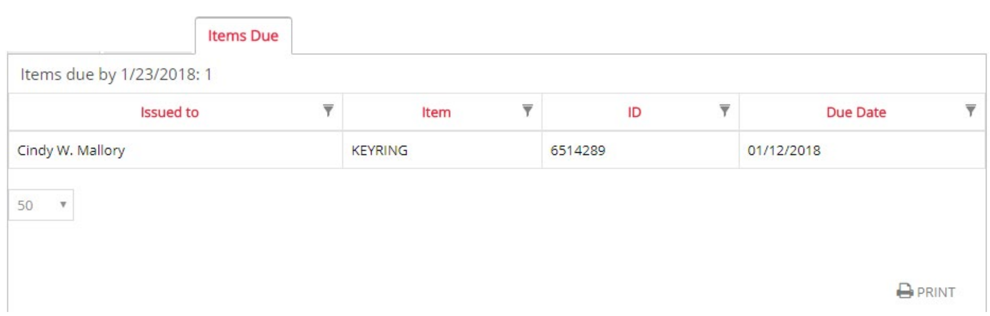
Step 1:
To add a Location select Add Location. Enter the new Location name and a Description if needed and then select Save.



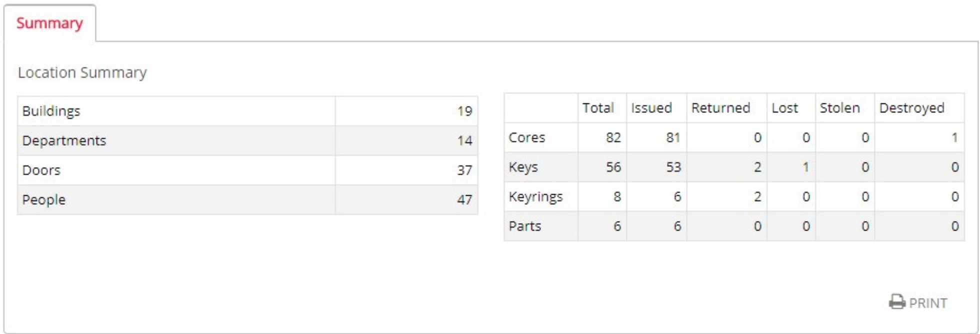
Step 2:
To edit a Location select Edit this Location from the Actions column of the Manage Locations screen on the row of the intended Location. Edit the Location name and Description as needed and select Save. Note that the Default and Demo Locations are not editable.

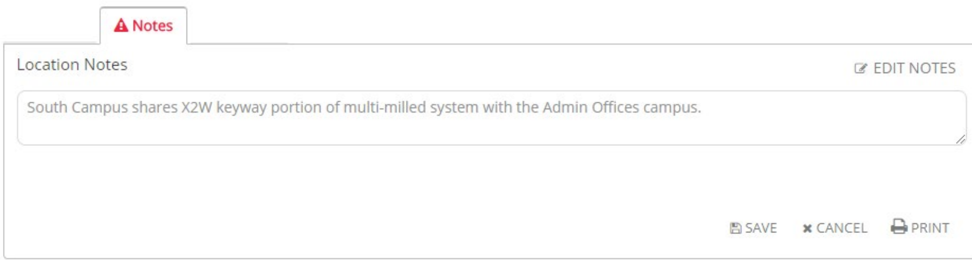
Step 3:
To purge a Location select Purge this Location from the Actions column of the Manage Locations screen on the row of the intended Location. Note that the Default and Demo Locations cannot be purged.

Step 4:
To access the details of a Location select Details of Location from the Actions column of the Manage Locations screen on the row of the intended Location. The Location Details screen shows Items Due for the Location and a Summary of the Items, Buildings, Departments, Doors, and People on record. Additionally, Notes for the Location can be added, reviewed, and edited. The following images show examples of Items Due, Summary, and Notes.



Note: See the "Alerts" section on page 65 for information on Items Due for all Locations



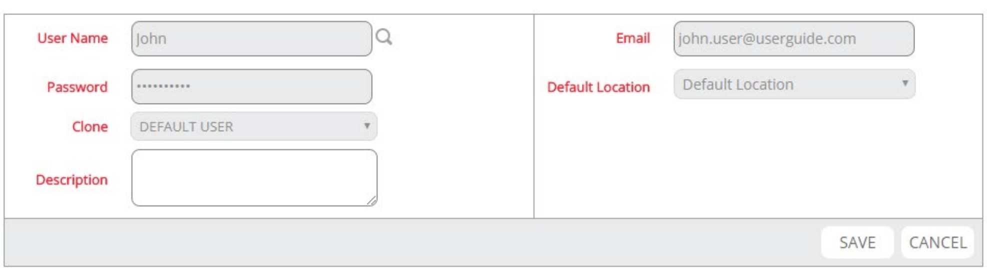


Manage Users

The Manage Users screen allows Administrators to add, edit, and remove users and define the permissions for each user, including which Locations they can access. Administrators access the Manage Users screen by the following path: Administration > Manage Users.

Add User

Step 1:
Select Add User.



Step 2:
Complete the User Name and Email fields for the new user. Note that User Name cannot include spaces.

Step 3:
The Password is subject to the following requirements, which also appear as on-screen error messages if the password doesn't meet the requirements.

- Must be 8 to 15 characters in length
- Cannot contain User Name
- Must contain at least one capital letter, one lower-case letter, one number, and one special character shown in the table below.

%	!	@	*	(	)
?	#	/	\	$	

Step 4:
Default Location is the Location which always appears first for the user when signing in. Configuring additional Location permissions is available after the initial user setup process.

Step 5:
Clone copies user permissions from an existing user to the new user to save time configuring detailed permission settings. In addition to specific users already set up, the Clone list contains Admin and Default User as options for permission cloning (see the "Permissions" section below for details about Admin and Default User).

Step 6:
Add a Description if needed and select Save to complete the transaction. In the example shown, John is being set up as a Default User with "Default Location" as his Default Location.

Permissions

Immediately upon creating a new user the Permissions configuration screen appears. The Admin can modify permissions for the newly-created user or return later to modify permissions.

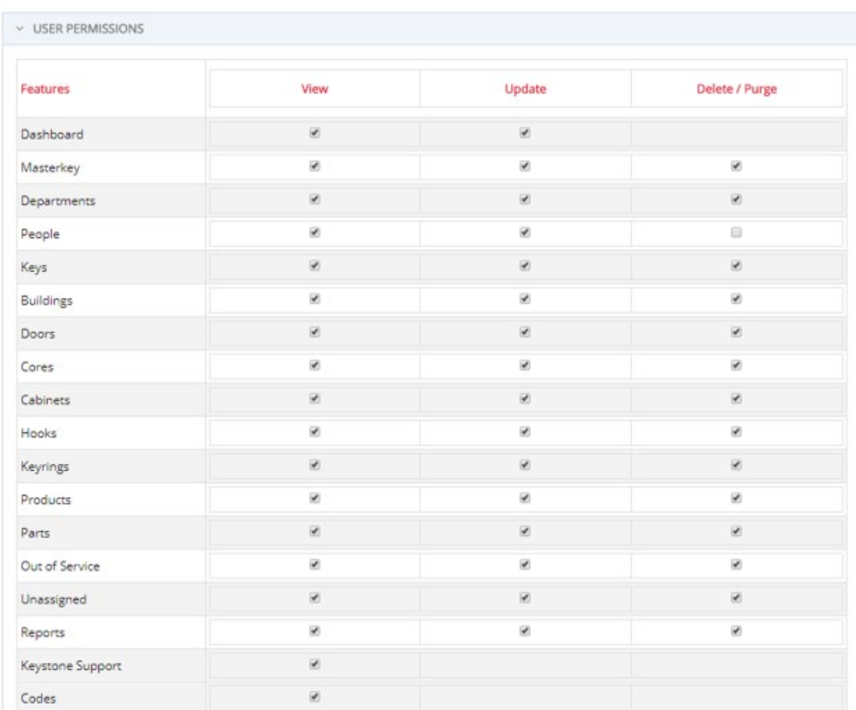
The Permissions configuration screen will vary based on whether the new user was set up with Admin permissions or a lower permissions level (Default User or cloned to an existing user). Administrators can reach the Permissions configuration screen at any time by the following path: Administration > Manage Users. Once in the Manage Users screen they can find the intended user record and select the Permissions button in the Actions column.

Step 1:
Permissions configuration for Admin users consists of a "Yes" or "No" radio button choice, indicating a change from Administrative-level permissions down to Default User permissions. After choosing the intended radio button, select Save to complete the action.

Step 2:
Permissions configuration for Default Users (including users cloned from other users) consists of the following settings: Administrative Permissions, User Permissions, Transaction Permissions, and Location Management. Selecting a row opens the configuration commands for each setting. Steps 3 to 6 explain the configuration options for these settings.

Step 3:
The Administrative Permissions setting is a “Yes” or “No” radio button choice, indicating a promotion to Administrative-level permissions. After choosing the intended radio button, select Save to complete the action.

Step 4:
User Permissions define the screens a user can view, along with the ability to update information and delete or purge data. Permissions are granted or removed by adding or removing the checkmark in each box. In the example below, user John is granted permission to see all the screens and to update information on all the screens, but he cannot delete or purge People records. Note that in addition to screens, View permissions can be configured for masterkey codes, shown as Codes on the list. If View permissions are removed for Codes, the Masterkey screen will be visible, but the codes for Coremarks/Keymarks will not. Select Save to retain updates to the User Permissions settings.


USER PERMISSIONS

Features	View	Update	Delete / Purge
Dashboard	✓	✓	
Masterkey	✓	✓	✓
Departments	✓	✓	✓
People	✓	✓	☐
Keys	✓	✓	✓
Buildings	✓	✓	✓
Doors	✓	✓	✓
Cores	✓	✓	✓
Cabinets	✓	✓	✓
Hooks	✓	✓	✓
Keyrings	✓	✓	✓
Products	✓	✓	✓
Parts	✓	✓	✓
Out of Service	✓	✓	✓
Unassigned	✓	✓	✓
Reports	✓	✓	✓
Keystone Support	✓		
Codes	✓		

Step 5:
Transaction Permissions define the activity related to Items (Keys, Cores, Keyrings, and Parts) that the user can perform. Permissions are granted or removed by adding or removing the checkmark in each box. In the example below, user John cannot perform any transactions related to keys in the People screen, but all other transactions are allowed. Select Save to retain updates to the Transaction Permissions settings.

TRANSACTION PERMISSIONS

Transactions	People	Doors	Hooks	Keyrings	Parts	Out of Service	Unassigned
Issue new key	☐		✔				
Return a key	☐						
Issue existing key	☐						
Transfer a key	☐		✔			✔	✔
Attach new key				✔			
Detach a key				✔			
Attach existing key				✔			
Install new core		✔			✔		
Remove a core		✔			✔		
Install existing core		✔			✔		
Transfer a core	✔	✔	✔			✔	✔
Issue new core	✔		✔				
Return a core	✔						
Issue existing core	✔						
Issue new keyring	✔		✔				
Return a keyring	✔						
Issue existing keyring	✔						
Transfer a keyring	✔		✔			✔	✔
Install new part		✔					
Remove a part		✔					
Install existing part		✔					
Transfer a part	✔		✔			✔	✔
Issue new part	✔		✔				
Return a part	✔						
Issue existing part	✔						

Step 6:
Location Management defines the Locations a user has access to and which of those Locations is the user's Default Location (the Location which always appears first for the user when signing in). Add or remove checkmarks to configure access to Locations and select the radio button of the Location intended as the Default Location. In the example below, John has access to the Locations called "South Campus" and "Main Campus" with "Main Campus" set as the Default Location. He does not have access to the "Community College Campuses" Location. Select Save to retain updates to the Location Management settings.

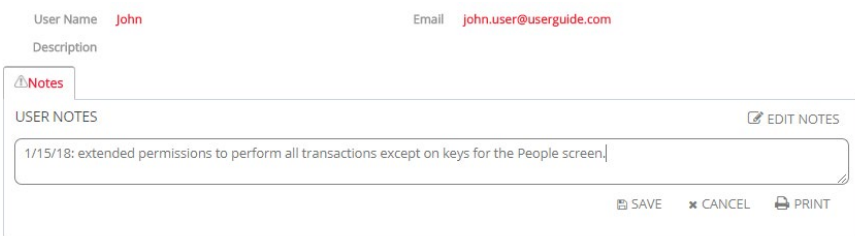
LOCATION MANAGEMENT

Location	Has Access?	Default Location
South Campus	✔	○
Main Campus	✔	◉
Community College Campuses	☐	○

SAVE CANCEL PRINT

Other Management User Screen Actions

Step 1:
User details can be accessed by selecting the **Details of User** button in the Actions column for the intended user. Inside the details, notes about the user can be reviewed, added or edited. Select the **Edit Notes** button to add or edit notes and select **Save** to keep the new notes.

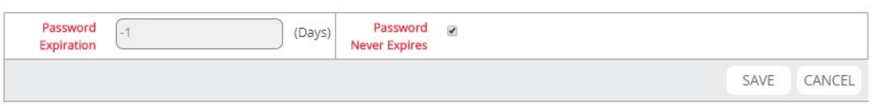


Step 2:
Users can be purged by selecting the **Purge this User** button in the Actions column for the intended user. Please note that purging will completely remove the user from the database. Note that Administrators cannot purge their own user record and the “BEST” user record cannot be purged.

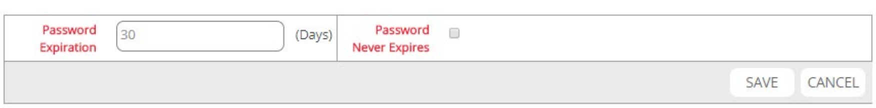
Step 3:
User information can be edited by selecting the **Edit this User** button in the Actions column for the intended user. The User Name, Email, Password, Default Location, and Description can all be changed in this action. Select **Save** to keep the modifications.

Set Password Rule

Administrators can set a time period after which all users must reset their passwords. The Set Password Rule screen is accessed by the following path: **Administration** > **Set Password Rule**. By default, Keystone Web’s password expiration period is set to “never expires,” as shown in the image below.



To update the password expiration time period, remove the checkmark from the **Password Never Expires** box and then enter the time period (in days) intended for password expiration. In the example below, users will be required to reset their passwords every thirty days. Select **Save** to retain the new password expiration rule.



Alerts

The Alerts screen stores and manages Items (Keys, Cores, Keyrings, and Parts) due for return. If a due date is specified when an Item is issued, the Item is visible in Alerts.

Alerts Icon

Administrators access the Alerts screen using the Alerts icon, located in the top-right of the Keystone Web user interface, between Change Password and Sign Out. The icon includes a number that indicates how many items are due on the current date or are past due. If no items are past due or due on the current date, zero appears as part of the icon. The Alerts screen manages items due for return by Location, so if more than one Location exists, any review of the Alerts screen should include moving to each Location to see items due for return in all Locations. Locations can be changed by selecting from the Location drop-down list in the top-center of the user interface. The first image below shows the Alerts icon with no items due/past due and the second image shows the icon with three items due/past due.

Choose Due Date

The Choose Due Date field defines the view of items due for return with reference to the time frame of the due dates. Choose to view items by the following conditions.

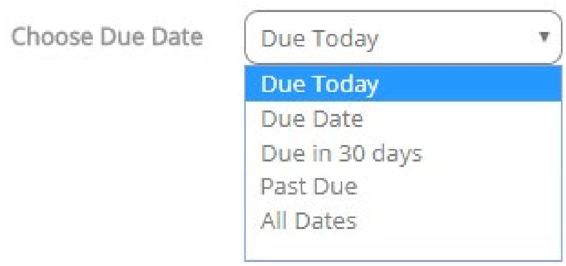
Due Today: Items due on the current date.

Due Date: Items due in a user-specified date range.

Due in 30 days: Items due in the past or next 30-day range from the current date.

Past Due: Items due prior to the current date.

All Dates: Items due on all dates past, present, and future.

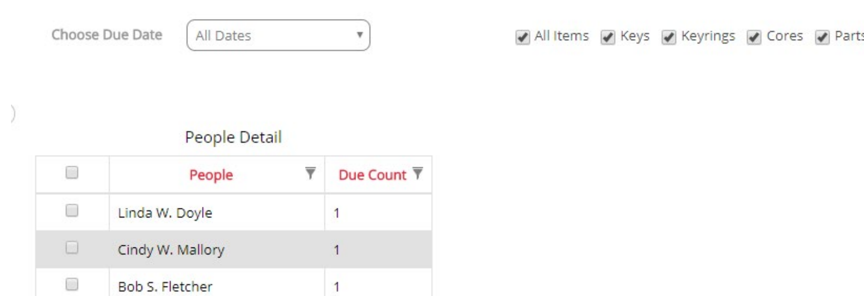


Item Type Refinement

The view of Items due can be refined to display one or more Item types. The selection of which Item types to display is controlled by the checkboxes located beside the Choose Due Date field. By default, All Items will display.

People Detail

Once Choose Due Date and Item type refinement have been configured, results populate in the People Detail grid. Each row contains the name of a person with an item due, along with the Due Count (how many Items due each person possesses). In the example below, All Items for All Dates have been searched and now display in People Detail. Note that the sort and filter features of all grids in Keystone Web are available for People Detail.



Each person's name is a hyperlink. Selecting a person's hyperlink will display the details of that person's Items due. In the example below, Bob Fletcher's name/hyperlink was selected and the Part that he holds is displayed, showing the Item type, the Item Name, and the Due Date.

Items held by **Bob S. Fletcher**

☐	Item	Item Name	Due Date
☐	PART	11-C Soldering Iron	02/08/2018

Print

A print option is available for the People Detail grid and the list of items held by each person. In the example below, the "Items held by Bob S. Fletcher" list has been printed.

02/21/2018 13:07 **Alerts**

Below is the list of items held by the person:Bob S. Fletcher

Item	Item Name	Due Date
PART	11-C Soldering Iron	02/08/2018

When the print activity is complete, use the Back To Alerts button in the upper-right of the print layout to return to the Alerts screen.

BACK TO ALERTS

Return Items

Items can be returned from the Alerts screen instead of using the standard return method from the screens of each Item type.

Step 1:
Select a person's name/hyperlink from the People Detail grid.

Step 2:
When the list of Items held by the selected person appears, select the Item intended for return by adding a checkmark to the checkbox on the row of the Item. In the example below, Keyring 6514289 is selected for return from Cindy Mallory.

Items held by **Cindy W. Mallory**

☑	Item	Item Name	Due Date
☑	KEYRING	6514289	01/12/2018

Step 3:
Select the Return Items button beneath the list of Items held. Using the current example, note that if Email Notifications have been configured for the return of Keyrings, an email will be sent by returning the Keyring from Alerts just as it would if the Item had been returned from the Keyrings screen.

Return Items

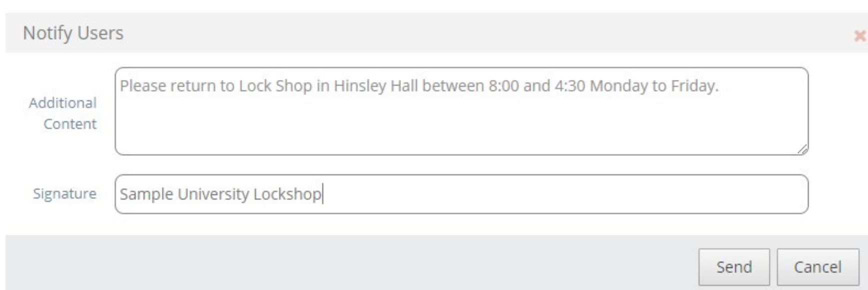
Notifying Users

Users with Items due can be notified by email from the Alerts screen. The separate feature under the Settings menu option called Email Notifications is where email forms can be configured to be sent automatically when an Item is Issued, Due, or Returned (see the separate chapter in this Guide entitled Email Notifications). Emails from the Alerts screen are created manually following the process outlined below and serve as a supplement to Email Notifications for Items Due. The intent of user notification from the Alerts screen is to send follow-up emails to selected people whenever an Administrator decides to take such action. Please note that an email form must be created in Email Notifications first for Items Due (Keys Due, Keyrings Due, Cores Due, and Parts Due) before an email can be sent from Alerts for a corresponding Item.

Step 1:
Select the intended person for notification from the People Detail grid.

Step 2:
Select the Notify Users button under the People Detail grid.

Step 3:
The Notify Users window appears. The email that is sent will already contain the item held by the person, along with a standard message (see example shown under step 4). Use the Additional Content field for any specific message necessary for the recipient and enter a name or group in the Signature field if needed. Select the Send button to send the email.



Step 4:
The email is sent to the recipient. Below is a sample of how the emails appear. Note that the Additional Content and Signature fields from step 3 have been added under the standard form content provided by Keystone Web.

Dear Kevin T. Beck,

This is to remind you that the following items were issued to you and they are due to be returned, please return them as soon as possible.

Item Type	Item Name	Quantity
KEY	2-5_1	1

Please return to Lock Shop in Hinsley Hall between 8:00 and 4:30 Monday to Friday.

Regards,
Sample University Lockshop

11 Dashboard

Dashboard

This chapter describes the following items and actions:

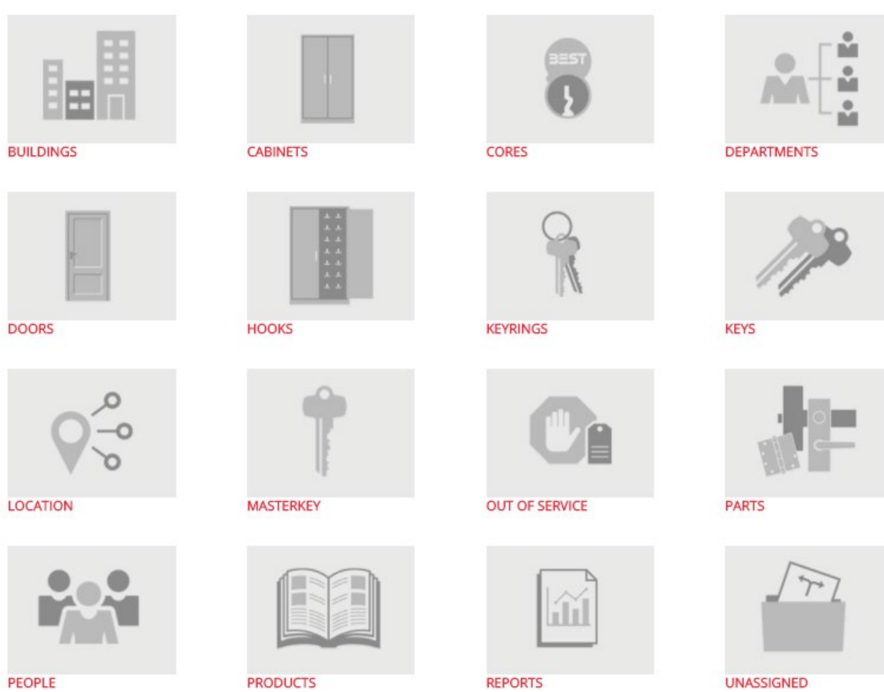
- Using the Dashboard
- Dashboard Configuration

Using the Dashboard

Keystone Web's Dashboard is a tile-based navigation feature. It also serves as the Home screen and can be reached in the following ways:

- Sign in
- Select Dashboard from the left menu
- Select the Home link located in the red header
- Select the Keystone Web logo

The sixteen most commonly used screens are represented by tiles, as seen in the image below. To navigate to a screen, select the screen's tile.



Dashboard Configuration

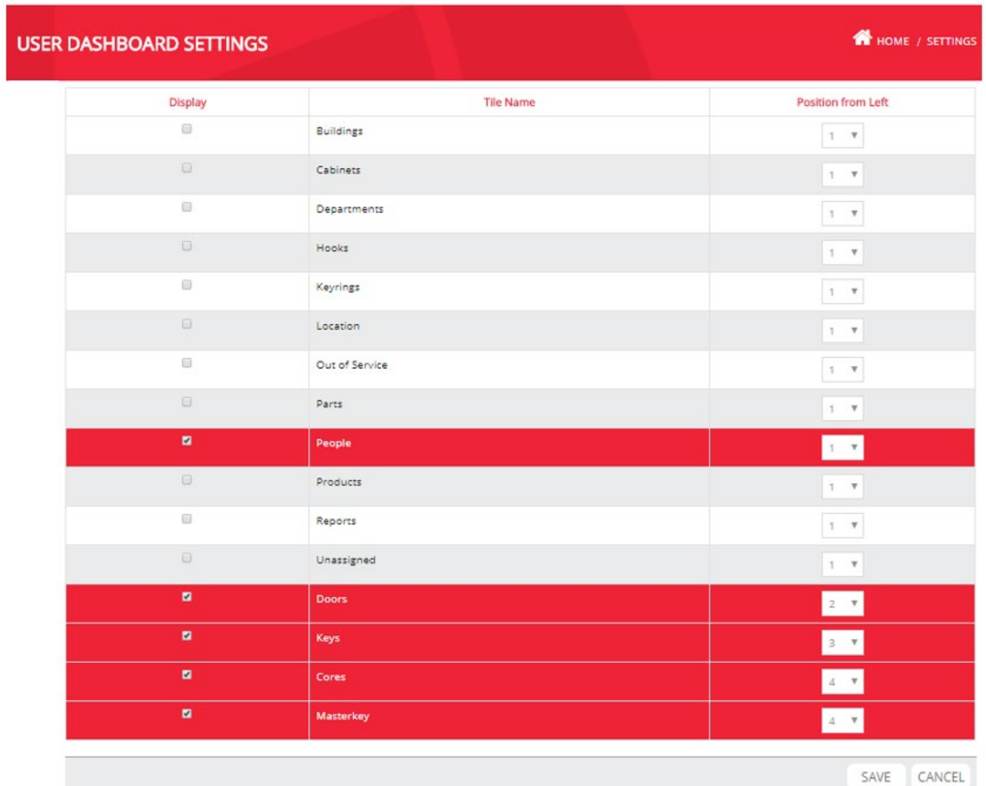
Users can configure the Dashboard to include as many or as few tiles as they require. By default, tiles for all the screens to which a user has access will display on the Dashboard. Screens that have been removed from a user's access will not be represented with a tile.

Users access the configuration screen by the following path: Home > Settings > Configure Dashboard. In the User Dashboard Settings screen, tiles can be included or excluded by adding or removing checkmarks in the Display column. Select the Save button to complete the configuration. In the example below, Kim was granted access to all sixteen of the possible tiles for her Dashboard, but has chosen to display only Cores, Doors, Keys, Masterkey, and People.

In addition to the display of tiles, users can configure the order in which the tiles appear on the screen. On the User Dashboard Settings screen, choose numbers in the drop-down boxes of the Position from Left column to reflect the sequence in which the tiles should appear. Note the following:

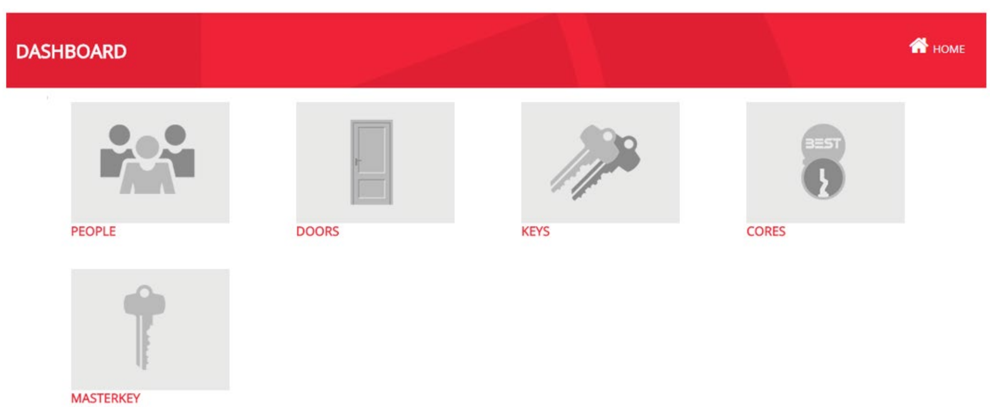
- The maximum number of tiles per row on the Dashboard is four.
- Numbers do not have to be unique. If two or more tiles have the same Position from Left sequence number, Keystone Web sorts them alphabetically.

In the example below, Kim has configured her tiles so that People appears first, followed by Doors, Keys, Cores, and Masterkey. Note that Cores and Masterkey share the same number in the Position from Left column. Based on the alphabetical sorting rule when two numbers match, the Cores tile will appear before Masterkey.



Display	Tile Name	Position from Left
☐	Buildings	1
☐	Cabinets	1
☐	Departments	1
☐	Hooks	1
☐	Keyrings	1
☐	Location	1
☐	Out of Service	1
☐	Parts	1
☑	People	1
☐	Products	1
☐	Reports	1
☐	Unassigned	1
☑	Doors	2
☑	Keys	3
☑	Cores	4
☑	Masterkey	4

Below is the resulting Dashboard display. Note the sorting of Cores first, followed by Masterkey.



12 Settings

Settings

1. Settings Overview
2. Serialization Config
3. Agreements
4. Return Receipts
5. Agreement Defaults
6. Detail Defaults
7. Maintain Filter
8. Configure People Required Fields
9. Set Time-Out

Settings Overview

The Settings section provides setup and configuration tools for the entire application and the individual user experience. Settings that impact the entire application are available only to Administrators, but all users can modify individual Settings.

Note that some of the features in Settings are explained in other chapters:

Feature	User Guide Chapter
Email Notifications	Email Notifications
Backup Database	Data Backups
Configure Dashboard	Dashboard
AD Manual Sync AD Sync History	Active Directory Synchronization
Email/AD Sync Scheduler	Email Notifications Active Directory Synchronization

Serialization Config

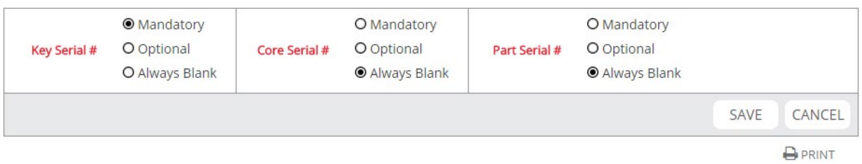
Serialization in Keystone Web is the practice of individually numbering Items that might otherwise be indistinguishable from each other. For example, if there are records for ten keys that are all cut to the "A12" Keymark code, a serial number applied to each of the keys provides a means of determining which one of the ten "A12" keys is in view.

Keys, Cores, and Parts are eligible for serialization. At the initial software installation, serialization is optional for all three eligible Items. Changes to these settings are made in the Serialization Config screen. Administrators access Serialization Config by the following path: **Home** > **Settings** > **Serialization Config**.

Step 1:
In **Key Serial #**, **Core Serial #**, and **Part Serial #**, select the radio button for the desired serialization setting.

Step 2:
Select **Save** to complete the configuration.

In the example below, **Key Serial #** has been set to Mandatory, while **Core Serial #** and **Part Serial #** have been set to Always Blank.



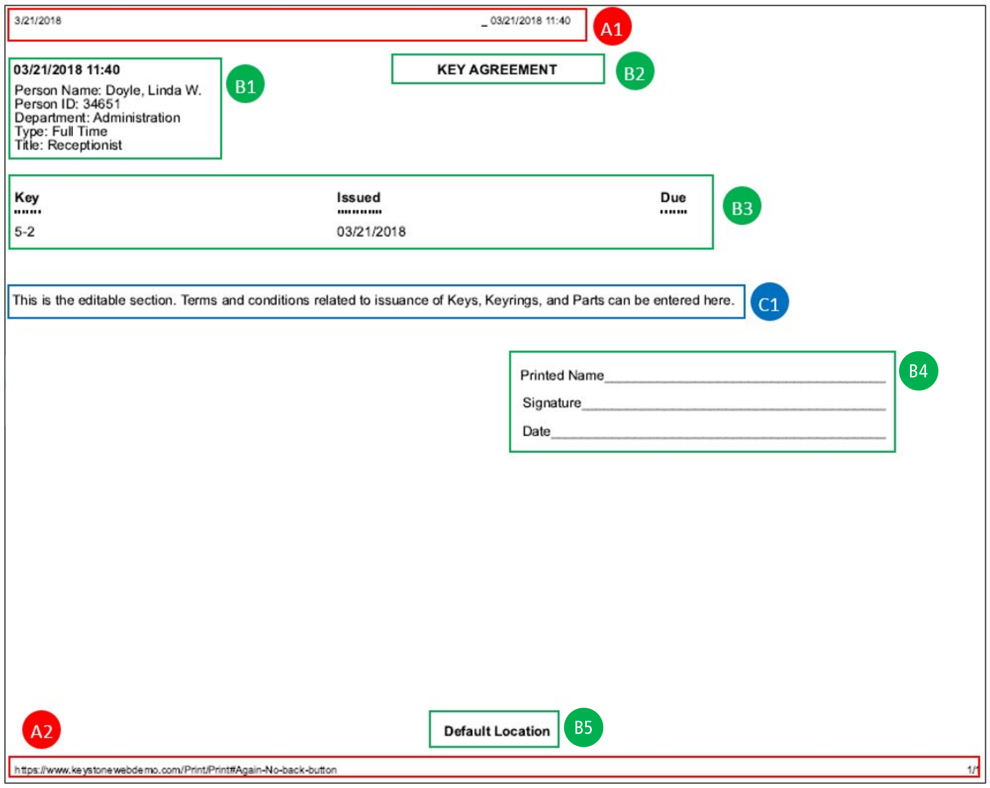
The table below explains each of the serialization options.

Option	Explanation	Notes
Mandatory	Items are automatically serialized as they are issued. Serialization is in numeric sequence, beginning with 1. Keystone Web keeps record of the next-in-sequence serial number.	Users cannot alter serialization numbers.
Optional	Items are automatically serialized as they are issued. Serialization is in numeric sequence, beginning with 1. Keystone Web keeps record of the next-in-sequence serial number.	Users can edit/replace the serialization numbers or remove the value from **Serial #** field if the Item does not require a serial number.
Always Blank	Items are not serialized.	Users cannot enter a value in the **Serial #** field.

Agreements

Agreements can be included as part of the issuing process when people receive Keys, Keyrings, or Parts. The Keystone Web database contains generic Agreements that are ready to use, or they can be cloned and modified to suit the specific terms and conditions required. Entirely new agreements can also be created.

The editable section of an Agreement is part of a structure that does not change. Below is a sample Agreement with descriptions of each part.



A1. Web browser-supplied header information (date, date/time)

A2. Web browser-supplied footer information (URL, pagination)

B1. Record information: automatically supplied by Keystone Web based on the person receiving Item(s)

B2. Agreement type: supplied by Keystone Web

B3. Item details: automatically supplied by Keystone Web based on item(s) issued

B4. Signature block: supplied by Keystone Web

B5. Location ID: supplied by Keystone Web; identifies the Keystone Web Location where the Item issuance originates

C1. Editable body section of Agreements

View Agreement

Administrators access Agreements by the following path: **Home** > **Settings** > **Agreements**. Keystone Web provides generic Agreement forms for Keys, Keyrings, and Parts, written to cover issuance to Employees, Contractors, and Security personnel. These Agreements are not editable, but they can be viewed, which is covered in this section. They can also be cloned, which is covered in the next section.

Step 1:
Go to the row of the Agreement to be viewed and select **Details of Agreement** from the Actions column.

Step 2:
This is a view-only display. The text in the **Content** field can be copied and pasted into an external source if needed. After viewing the Agreement, select **Cancel** at the bottom-right of the Agreement display or Manage Agreement from the breadcrumb to return to the main **Manage Agreements** screen.

Clone Agreement

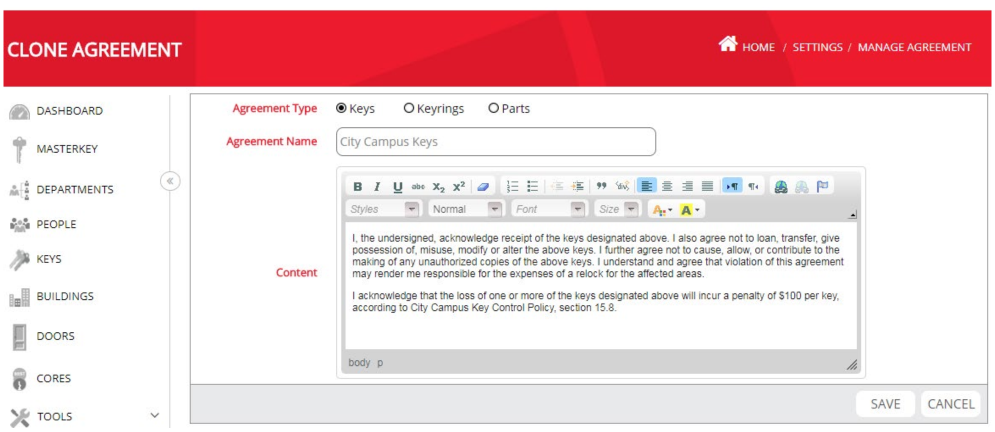
Step 1:
Go to the row of the Agreement to be cloned and select **Clone this Agreement** from the Actions column. In the example below, the generic Employee/Keys Agreement has been selected for cloning.

Step 2:
Change the **Agreement Type** radio button to reflect the type of Item intended for the new Agreement (note that it's best to clone an Agreement that matches the type of Item intended for the new Agreement, to save time in editing the **Content** field).

Step 3:
Add the **Agreement Name** for the new Agreement to help identify it from other available Agreements. In the example below, "City Campus Keys" has been entered for the **Agreement Name**.

Step 4:
Add additional text or edit existing text in the **Content** field. In the example below, a sentence has been added to document the penalty for lost keys. Note that text formatting is available using the formatting toolbar.

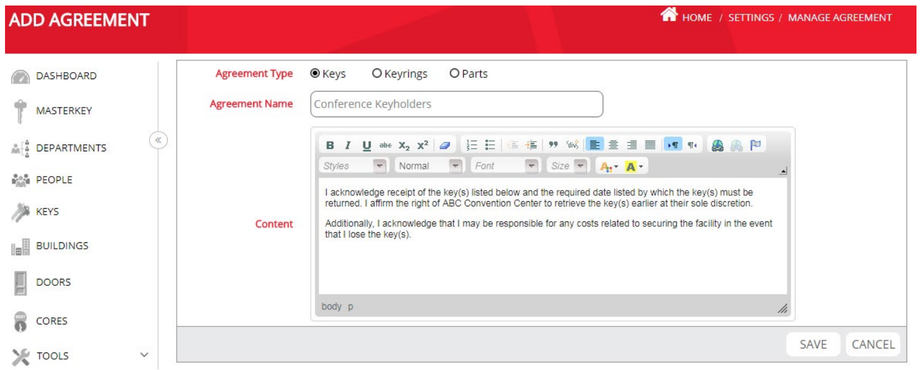
Step 5:
Select **Save** to complete the new Agreement.



Add New Agreement

Step 1:
Select **Add Agreement**

Step 2:
Choose the appropriate **Agreement Type** radio button (Keys, Keyrings, Parts), enter an **Agreement Name** and the required **Content**. In the example below, a new Key Agreement called "Conference Keyholders" is being created.



Step 3:
Select **Save** to complete the addition.

Edit an Agreement

Step 1:
From the Manage Agreements screen, go to the row of the intended Agreement and select **Edit this Agreement** from the Actions column.

Step 2:
Agreement Type, **Agreement Name**, and **Content** are available for editing. Make the necessary changes and select **Save** to complete the edit.

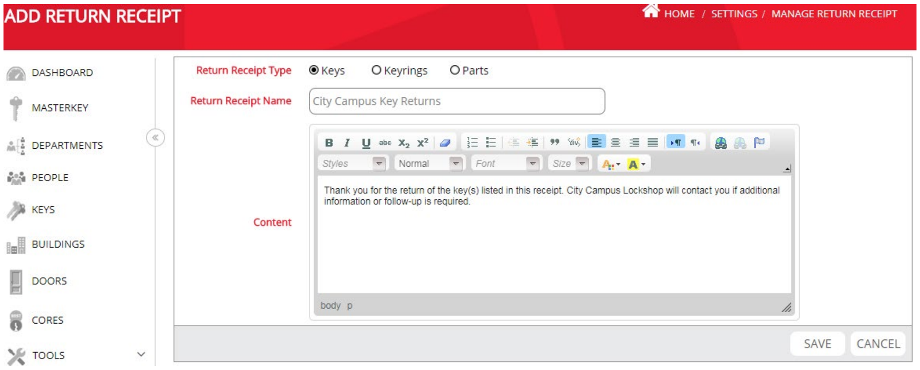
Return Receipts

Return Receipts can be issued to people upon the return of Keys, Keyrings, or Parts. After a Return Receipt has been created, it can be cloned to produce multiple receipts for different item types. The structure of Return Receipts, including the editable and permanent features, is modeled on the structure of Agreements. Please see the Agreements section for details on the structure.

Add a Return Receipt

Step 1:
Select Add Return Receipt

Step 2:
Choose the appropriate **Return Receipt Type** radio button (Keys, Keyrings, Parts), enter a **Return Receipt Name** and the required **Content**. In the example below, a Return Receipt has been created for Keys at the City Campus.

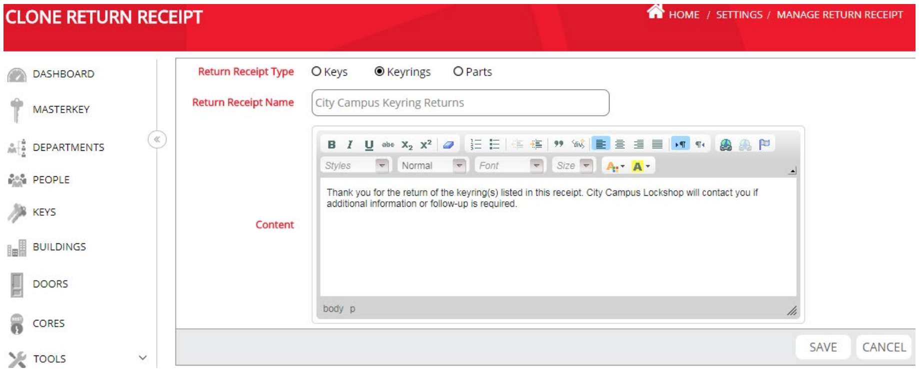


Step 3:
Select **Save** to complete the addition.

Clone a Return Receipt

Step 1:
Go to the row of the Return Receipt to be cloned and select **Clone this Return Receipt** from the Actions column.

Step 2:
Modify the **Return Receipt Type** radio button selection, add a new **Return Receipt Name**, and edit the **Content** to reflect the intended appearance of the new Return Receipt. In the example below, City Campus Key Returns was selected for cloning and edited for use with Keyrings.



Step 3:
Select **Save** to complete the clone.

View a Return Receipt

Step 1:
Go to the row of the intended Return Receipt and select **Details of Return Receipt** from the Actions column.

Step 2:
This is a view-only display. The text in the **Content** field can be copied and pasted into an external source if needed. After viewing the Return Receipt, select **Cancel** at the bottom-right of the Return Receipt display or **Manage Return Receipts** from the breadcrumb to return to the main Manage Return Receipts screen.

Edit a Return Receipt

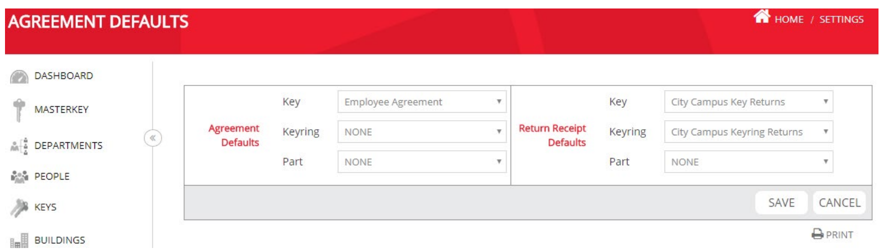
Step 1:
From the Manage Return Receipts screen, go to the row of the intended Return Receipt and select **Edit this Return Receipt** from the Actions column.

Step 2:
Return Receipt Type, **Return Receipt Name**, and **Content** are available for editing. Make the necessary changes and select **Save** to complete the edit.

Agreement Defaults

Agreements and Return Receipts can be selected each time an item is issued or returned. As a convenience, Keystone Web can default to a pre-selected Agreement or Return Receipt to save the time of selecting during each transaction. Administrators access Agreement Defaults by the following path: **Home** > **Settings** > **Agreement Defaults**.

Step 1:
For **Agreement Defaults** and **Return Receipt Defaults**, choose the intended default document from the drop-down list of each Item type. Note that Keystone Web defaults to None for all Item types in both Agreements and Return Receipts. In the example below, defaults have been selected for Key Agreements and Key and Keyring Return Receipts.

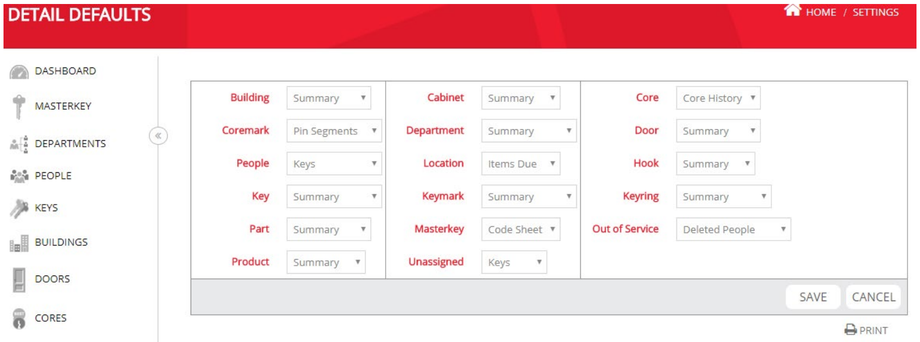


Step 2:
Select **Save** to complete the configuration.

Detail Defaults

All individual records in Keystone Web and some screens have Detail tabs that provide category-specific information about various aspects of the individual record or screen. The user can select each Detail tab to view information, perform transactions, or jump to corresponding records. As a convenience, users can select default Detail tabs per record or screen, saving the time of navigating to the Detail tabs that are most frequently used. Note that this configuration is user-specific. All users access Detail Defaults by the following path: **Home** > **Settings** > **Detail Defaults**.

Step 1:
For each record/screen listed, choose the intended default Detail tab from the drop-down list.



Step 2:
Select **Save** to complete the configuration.

Maintain Filter

Filters play a vital role in the search process in Keystone Web screens. By default, filters are set to clear each time a user leaves the grid list where a filter was applied. Users can configure Keystone Web to remember filter selections and retain them while they are working in each screen. All users access Maintain Filter by the following path: **Home** > **Settings** > **Maintain Filter**.

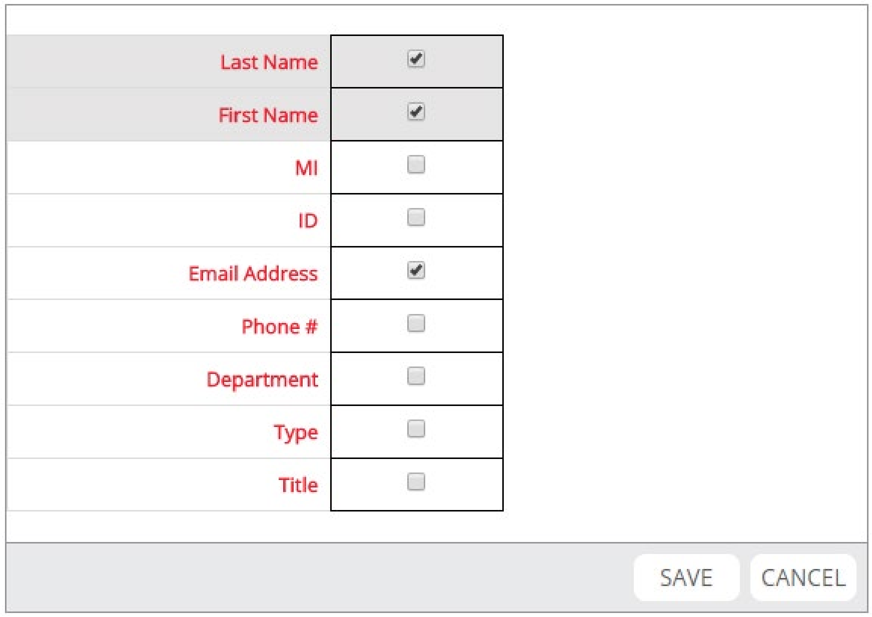
Step 1:
Select Yes from the **Maintain Filter** drop-down to remember filter selections and retain them while working in a screen. Note that this filter retention is only maintained when working continuously in a screen. For example, Holly sets Maintain Filter to Yes and then goes to the Doors screen and filters by Building so that only Administration building door records display. She then selects **Details of Door** for Door 101 and installs a core in the door. When she completes the core installation and returns to the Manage Doors screen (either by the selecting Doors from the left menu or by selecting Manage Doors from the breadcrumb), the list of doors will still be filtered to show only Administration building doors. However, if after installing the core in Door 101, Holly navigates to the People screen and subsequently returns to the Doors screen, the Administration filter in the Building column will have cleared.

Step 2:
If you choose “No”, all filters will be cleared with any action taken, even within the same screen. Note that this is the default selection for Maintain Filter.

Configure People Required Fields

Except for **Last Name** and **First Name**, the fields that comprise People records can be configured as required or optional. Administrators access Configure People Required Fields by the following path: **Home** > **Settings** > **Configure People Required Fields**.

The default required fields are **Last Name**, **First Name**, and **Email Address**. As noted above, **Last Name** and **First Name** are permanently required fields and cannot be configured. Add or remove checkmarks from any of the seven configurable fields (including Email Address) and select **Save** to complete the new configuration.



Set Time-Out

Keystone Web will time out after a period of inactivity and return users to the sign-in screen. The default time-out period is thirty minutes of inactivity. In the Set Time-Out setting, the time-out period can be increased or decreased by entering the number of minutes required and selecting **Save**. Administrators access Set Time-Out by the following path: **Home** > **Settings** > **Set Time-Out**.

13 Out of Service and Unassigned

Out of Service and Unassigned

1. Out of Service Overview
2. Viewing and Managing Items in Out of Service
3. Unassigned Overview
4. Viewing and Managing Items in Unassigned

Out of Service Overview

Out of Service is the management screen for Items (Cores, Keys, Keyrings, Parts) that are reported as Destroyed, Lost, or Stolen. For these critical security categories, Out of Service provides organization and visibility. In addition to data regarding Items, Out of Service also displays deleted Doors and People. Users access Out of Service by the following path: **Home** > **Tools** > **Out of Service**.

Viewing and Managing Items in Out of Service

Viewing Items

Step 1:
The Out of Service screen contains a summary table for each category.

Destroyed Items

Cores	1
Keyrings	0
Keys	0
Parts	0

Lost Items

Cores	0
Keyrings	0
Keys	1
Parts	0

Stolen Items

Cores	0
Keyrings	0
Keys	0
Parts	0

Deleted Items

Doors	26
People	0

Step 2:
There are detail tabs for each Item type (Cores, Keys, Keyrings, and Parts). To view details for an Item type, select a tab and the display refreshes with the selected details.

Step 3:
There is a detail tab for History. Any Item that has been in Out of Service and subsequently transferred to another disposition will appear on this list. The Disposition column shows the Item's disposition while in Out of Service and the Prior Disposition column shows the Item's disposition immediately before being sent to Out of Service. History for the Item before and after these two events can be viewed on the History detail tab of the Item itself.

Step 4:
The Items detail tab shows the details of all the Items in Out of Service. It combines in one list the details shown in the Cores, Keys, Keyrings, and Parts detail tabs.

Step 5:
The Keys with Products detail tab shows all the keys in Out of Service, with an added column for the Product assigned to each one. If no Products have been associated with keys in Keystone Web, this list will not provide any information not already available on the Keys detail tab.

Step 6:
Deleted People and Deleted Doors list all People and Door Records that have been deleted. Please note the following:

a. A deleted record remains in the Keystone Web database, but is moved to separate listing from the active records of its type. Only records that are purged are removed from the database.

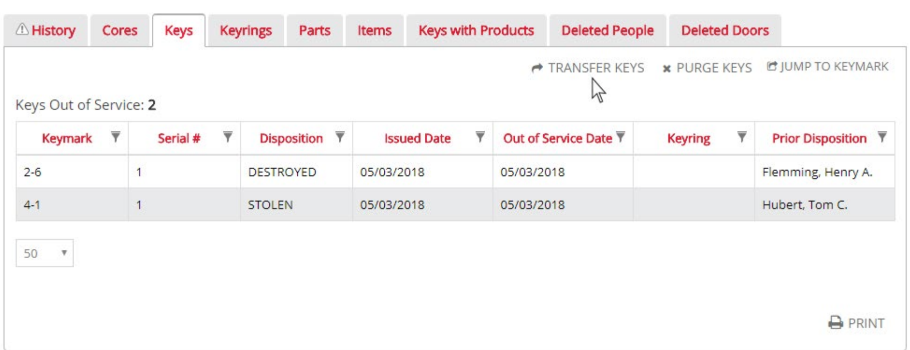
b. Deleted People and Door records can also be viewed in the People and Door screens by switching the radio button display to Deleted from Active. It is from the People and Door screens that deleted records are purged, so the Deleted People and Deleted Doors detail tabs in Out of Service are for reference only.

Step 7:
The "Jump To" feature is available for the Cores, Keys, Keyrings, Parts, Items, and Keys with Products detail tabs. This feature takes the user to the specific record of any Item selected from one of the detail lists. Select an individual record and then select Jump To from the upper-right of the detail tab display.

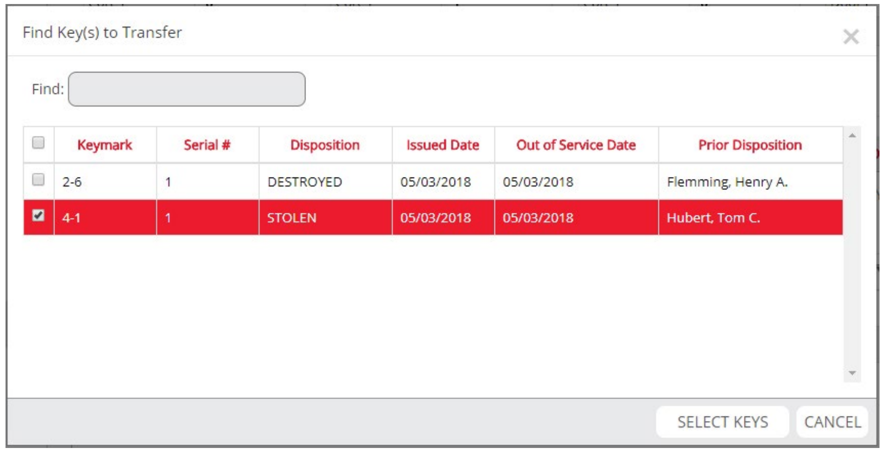
Transferring Items

Typically, an item that is sent to any of the Out of Service dispositions has made its final movement in Keystone Web. However, transfers can be made in the event of a mistake or a recovery of items that were Lost or Stolen.

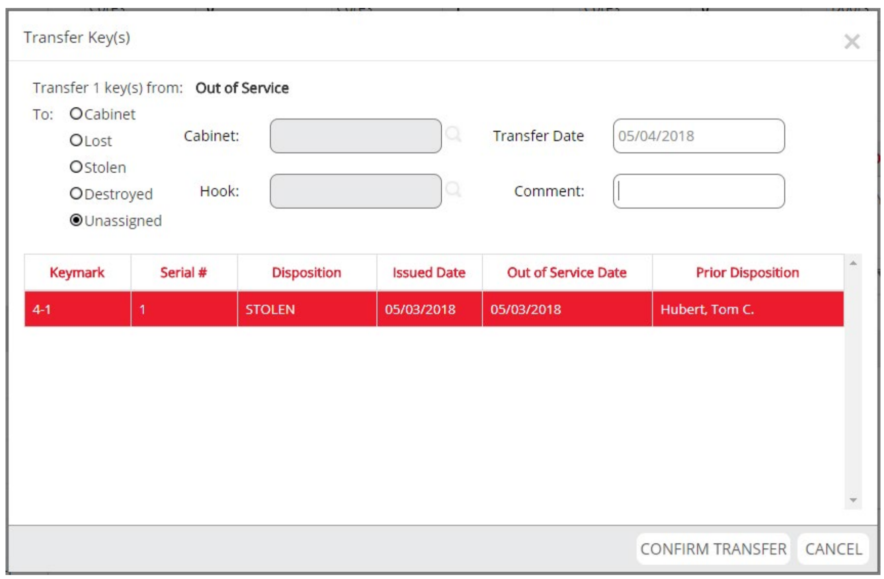
Step 1:
From the detail tab of the Item intended for transfer, select **Transfer**. Note that the **Transfer** action will always include the Item type. In the example below, Key 4-1, serial # 1 is intended for transfer, so **Transfer Keys** is selected to begin the process.



Step 2:
The Find Key(s) to Transfer window appears. Place a check mark in the box of the key(s) intended for transfer. Multiple keys can be selected using the **Shift** and **Ctrl** keys or by adding a check to the box of each key. All the keys on the list can be selected at once using the checkbox to the left of the column headings. Use the **Find** field if necessary to locate the intended key(s). **Select Keys** completes the selection.

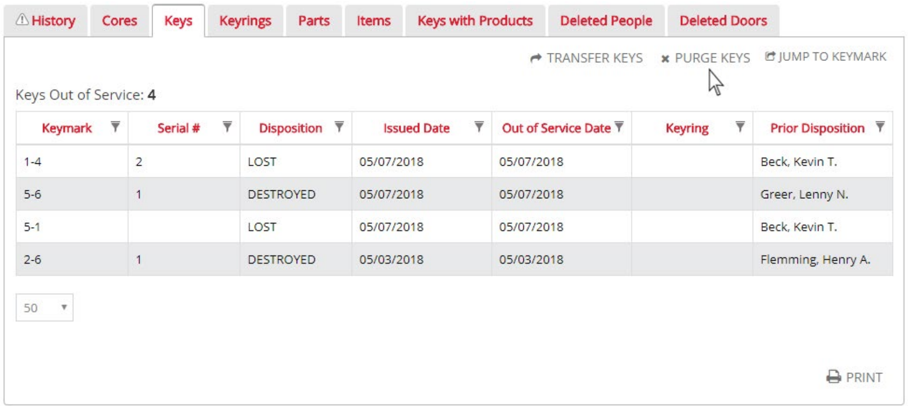


Step 3:
In the Transfer Key(s) window, select the destination of the transfer, using the search fields for Cabinet and Hook if a Cabinet is intended as the new disposition. The **Transfer Date** field can be modified to reflect when the transfer occurred (it defaults to the current date). Enter information in the **Comment** field as needed and select **Confirm Transfer**. In the example below, the selected key is being transferred to Unassigned.

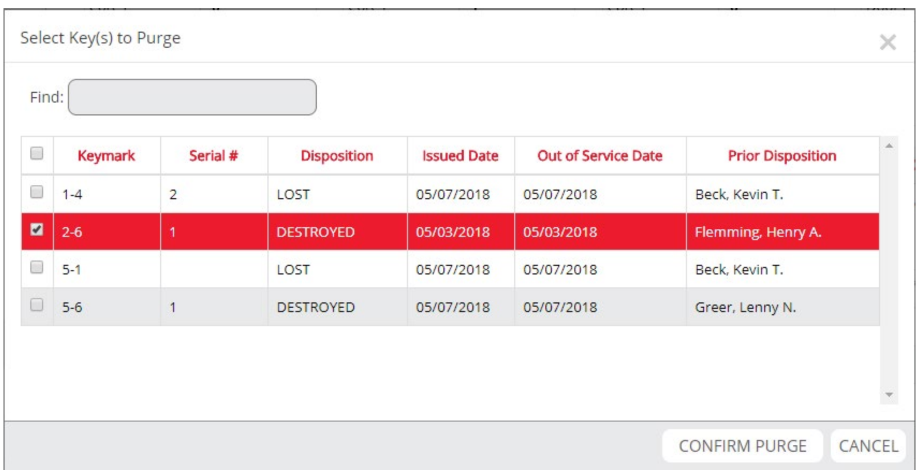


Purging Items

Step 1:
From the detail tab of the Item to be purged, select **Purge**. Note that the **Purge** action will always include the Item type. In the example below, Key 2-6, serial # 1 will be purged, so **Purge Keys** is selected to begin the process.



Step 2:
The Select Key(s) to Purge window appears. Place a check mark in the box of the key(s) to be purged. Multiple keys can be selected using the **Shift** and **Ctrl** keys or by adding a check to the box of each key. All the keys on the list can be selected at once using the checkbox to the left of the column headings. A confirmation window appears, noting that all history associated with the Item(s) will also be purged. Select **Yes** to confirm or **No** to cancel the purge.



Unassigned Overview

Unassigned is a storage area for Items. Each Item category (Cores, Keys, Keyrings, and Parts) is segmented and pertinent information about individual records is displayed. However, in contrast to Cabinets, Unassigned does not feature individualized storage locations like Hooks. Instead, Unassigned stores Items only by category. As such, it is a convenient way to keep small quantities of Items that are not installed in Doors or issued to People. Users access Unassigned by the following path: **Home** > **Tools** > **Unassigned**.

Managing Items in Unassigned

Viewing Items

Step 1:
The table at the top of the Unassigned screen shows a summary of Items by Category.

Unassigned Items

Cores	19
Keyrings	3
Keys	7
Parts	1

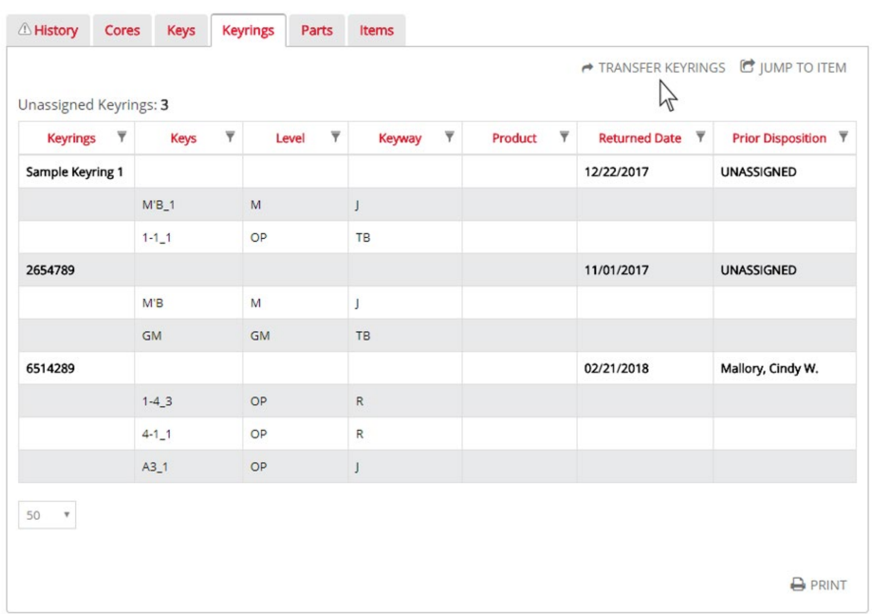
Step 2:
There are detail tabs for each Item type (Cores, Keys, Keyrings, and Parts), plus the Items detail tab shows a list of all Item types with general information. To view details for an Item type, select a tab and the display refreshes with the selected details.

Step 3:
There is a detail tab for History. Any Item that has been in Unassigned and subsequently transferred to another disposition will appear on this list. The Prior Disposition column shows the Item's disposition immediately before being sent to Unassigned. History for the Item before Prior Disposition and after being transferred from Unassigned can be viewed on the History detail tab of the Item itself.

Step 4:
The "Jump To" feature is available for all the detail tabs. This feature takes the user to the specific record of any Item selected from one of the detail lists. Select an individual record and then select Jump To from the upper-right of the detail tab display.

Transferring Items

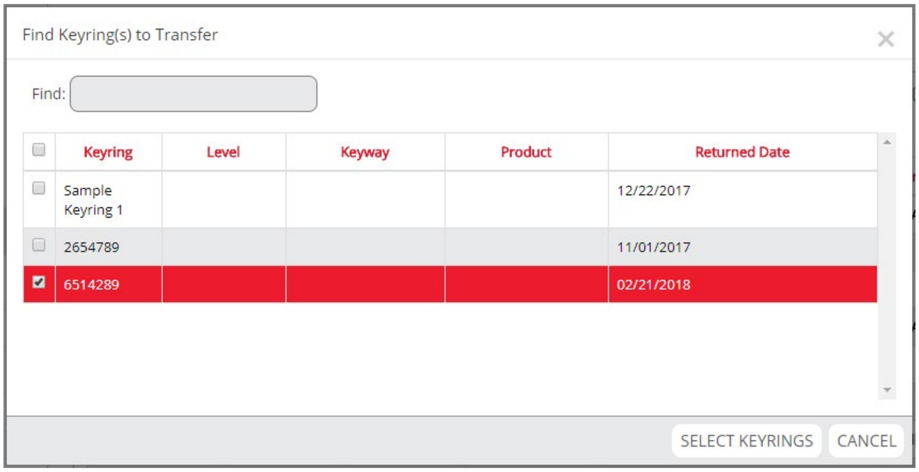
Step 1:
From the detail tab of the Item intended for transfer, select **Transfer**. Note that the **Transfer** action will always include the Item type. In the example below, Keyring 6514289 is intended for transfer, so **Transfer Keyrings** is selected to begin the process.



Keyrings	Keys	Level	Keyway	Product	Returned Date	Prior Disposition
Sample Keyring 1					12/22/2017	UNASSIGNED
	M'B_1	M	J			
	1-1_1	OP	TB			
2654789					11/01/2017	UNASSIGNED
	M'B	M	J			
	GM	GM	TB			
6514289					02/21/2018	Mallory, Cindy W.
	1-4_3	OP	R			
	4-1_1	OP	R			
	A3_1	OP	J			

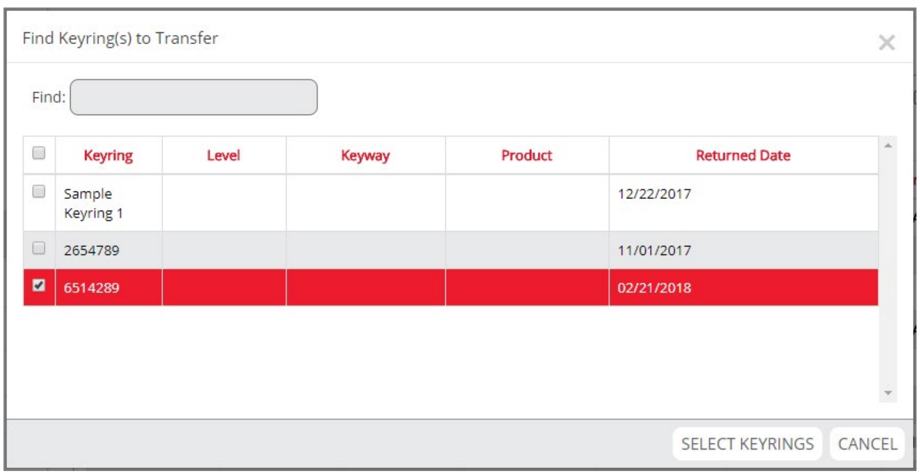
Step 2:

The Find Keyring(s) to Transfer window appears. Place a check mark in the box of the keyring(s) intended for transfer. Multiple keyrings can be selected using the **Shift** and **Ctrl** keys or by adding a check to the box of each keyring. All the keyrings on the list can be selected at once using the checkbox to the left of the column headings. Use the **Find** field if necessary to locate the intended keyring(s). **Select Keyrings** completes the selection.



Step 3:

In the Transfer Keyring(s) window, select the destination of the transfer, using the search fields for Cabinet and Hook if a Cabinet is intended as the new disposition. The **Transfer Date** field can be modified to reflect when the transfer occurred (it defaults to the current date). Enter information in the **Comment** field as needed and select **Confirm Transfer**. In the example below, the selected keyring is being transferred to Hook 9 of the Tool Crib cabinet.



14 Products and Parts

Products and Parts

Products and Parts Overview

Parts are items other than cores and keys that are used, managed, and tracked. Parts can range from door hardware, like hinges and locksets, to tools that are shared by a team of people. They can be installed on Doors, issued to People, and stored in Cabinets or in Unassigned. Additionally, they can be removed from active use and reported as Lost, Stolen, or Destroyed. Like cores and keys, Parts include a History detail tab to show all past movement and dispositions for each individual item.

Products are the source records for the creation of Parts. Like a catalog, Products contain the manufacturer and ordering nomenclature for any Part in use. Cores and Keys can also have a Product affiliation, but all Parts must be created from a Product record. Consider the following example.

> I have a catalog on my shelf for door closers. The door closer I use for all doors in my facility is called LC-875-TR-D in the manufacturer's catalog. When I place an order for 20 door closers, I provide the single nomenclature LC-875-TR-D and specify a quantity of 20. Last year I specified LC-875-TR-D with a quantity of 50. So, for this year and last year, I have received 70 door closers and installed them on doors, but I have done so with just one product nomenclature.

In Keystone Web, the nomenclature LC-875-TR-D is a Product record and the 70 door closers received are all Parts created from the single Product record. Each Part (in this example, door closers) will be issued or installed individually, will be tracked individually, and each will have its own history, but all of them correspond to a single Product that identifies what the Parts are and the source to procure more.

Managing Products

Keystone Web comes with thousands of BEST Access Solutions Products pre-loaded. Users can add an unlimited number of Products from any manufacturer. Both the pre-loaded and user-created Products can be viewed, edited, and purged. Users access Products by the following path: **Home** > **Tools** > **Products**.

Add Products

Step 1:
Select **Add Product** from the Manage Products screen.

Step 2:
Complete the **Product** and **Manufacturer** fields (note: **Product** is the only required field). Add a **Description** as needed. The **Type** field is a pre-populated list that defines the general category, or type, of Product. In the example below, a new hinge Product record is being added. Select **Save** to complete the addition.

Step 3:
Note that the Product **Type** called "Part" allows for specification of how many cores the Product uses, so this Type can be selected when creating a new lockset, padlock, or any other device that receives a core.

View, Edit, and Purge Products

Step 1:
To view a Product, select **Details of Product** from the Actions column on the row of the intended Product. The Summary, Notes, Items, and History detail tabs provide information related to the Product and how it is being used. Notes can be edited or amended. The Jump To feature is available to go to individual Part records from the Items and History tabs.

Step 2:
To edit a Product, select **Edit this Product** from the Actions column on the row of the intended Product. Changes can be made to the **Product**, **Manufacturer**, **Description**, and **Type** fields. Select **Save** to complete the edit.

Step 3:
To purge a Product, select **Purge this Product** from the Actions column on the row of the intended Product. A confirmation is required to complete the purge. Note that if Parts have been created from the Product the purge will not be successful. The Parts must be purged before the source Product can be purged.

Managing New Parts

Users access Parts by the following path: **Home** > **Tools** > **Products**.

Add New Parts (from the Manage Parts Screen)

Step 1:
Select **Add Part** from the Manage Parts screen.

Step 2:
Search for the Product from which the Part will be created in the **Product** field. The **Serial #** field will follow the configuration chosen for Part serialization by the Administrator (see the Serialization Config section in the Settings chapter for details). Add a **Description** if needed and change the default **Quantity** (1) if multiple Parts are intended. Note that the **Manufacturer** and **Number of Cores** fields will complete automatically based on the **Product** field choice. Select **Save** to complete the new Part addition.

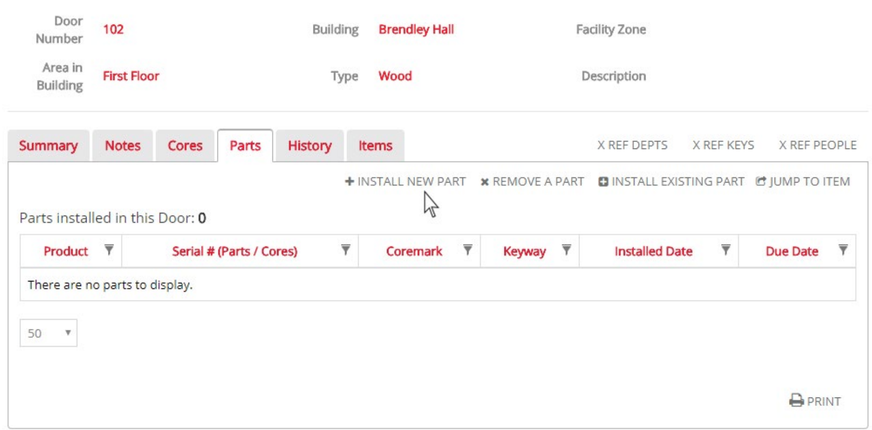
Step 3:
Note that Unassigned is the automatic disposition of Parts created from the Manage Parts screen.

Add New Parts (from Doors and People)

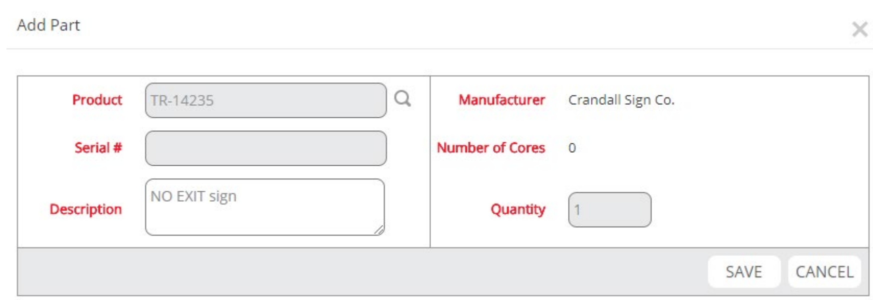
Step 1:
Select **Details of Door** or **Details of Person** from the Actions column on the row of the intended Door or Person.

Step 2:
Select the Parts detail inside the individual Door or People record.

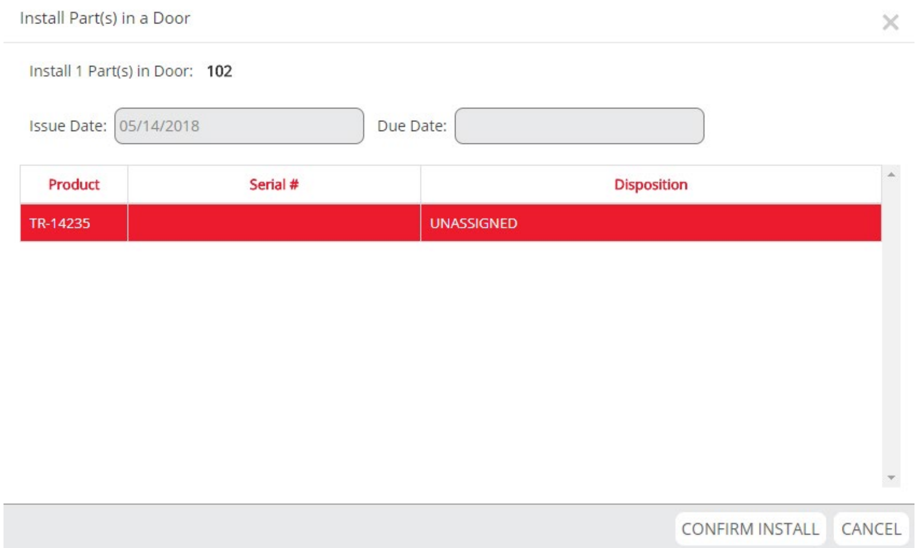
Step 3:
Select **Install New Part** (Doors) or **Issue New Part** (People). In the example below, a sign will be installed on Door 102 in Brendley Hall.



Step 4:
In the Add Part window, use the **Product** field to search the Product for the intended Part. The **Serial #** field will follow the configuration chosen for Part serialization by the Administrator (see the Serialization Config section in the Settings chapter for details). Add a **Description** if needed and change the default **Quantit**y (1) if multiple Parts are intended.



Step 5:
Change the **Issue Date** (defaults to the current date) and add a **Due Date** if needed. **Confirm Install** completes the installation. Note that when issuing a Part to a person, an Agreement can be printed for the Part holder to sign.



Managing Existing Parts

Existing Parts can be stored in Unassigned or in a Cabinet. When Parts are returned from a door or person, Unassigned or Cabinet choices are available, along with Out of Service, if the Part is Lost, Stolen, or Destroyed. Unassigned is the default disposition when a Part is created from the Manage Parts screen. Like all Items, existing Parts retain a History of past transactions and dispositions.

Existing Parts can be issued to People or installed in Doors following the steps in the Add New Parts (from Doors and People) instructions above. Instead of selecting **Install New Part** (Doors) or **Issue New Part** (People), choose instead **Install Existing Part** (Doors) or **Issue Existing Part** (People).

15 Icons

An image of each Keystone Web icon including a description of its function is provided below.

Activity Log

Displays activity (records updated or deleted, transactions performed, etc.) of a selected user.

AD Manual Sync

Lists people records that do not currently have a match to a record in the organization's Active Directory (AD). Users can select individual records and perform a manual synchronization with AD.

AD Sync History

Contains all records that have been updated by Active Directory (AD) synchronization. Records are displayed in a comparative layout, showing each record before and after synchronization.

Administration

The Administration sub-menu contains Activity Log, Maintain List, Manage Locations, Manage Users, and Set Password Rule.

Agreements

Content management for Agreements that can be printed for signature when items (keys, keyrings, etc.) are issued. Users can modify sample Agreements or create new ones.

Agreement Defaults

Selected Agreements can be configured to be the default when items (keys, keyrings, etc.) are issued. Default Agreements can be set per item type.

Alert

Indicates the presence of content in the Notes sections throughout Keystone Web.

Append New Codes

Appends new code records to an existing masterkey system using files provided by Keystone Support.

Backup Database

Creates a backup of the database for stand-alone and server installations of Keystone Web.

Buildings

Keeps record of buildings and their doors, along with the locks and door hardware installed on them. Cross references to Departments, People, and Keys.

Cabinets

Keeps record of security storage cabinets and their hooks, along with the keys, keyrings, and other assets stored in them.

Configure Dashboard

Customizes the appearance and sort order of tiles on the Dashboard.

Cores

Keeps track of all cores in use. Current disposition of each core is displayed and a history is stored for each core record as the core is installed and then removed from a door, stored in a cabinet, etc.

Dashboard

Tile-based navigation of Keystone Web, configurable by each user.

Delete

Deletes selected records and moves them to a deleted list. Although the deleted records do not appear in the active list for their category, they are still present in the database until purged.

Departments

Keeps record of departments and their people, along with the keys and other security assets issued to them. Cross references to Buildings, Doors, and Cores.

Details

Opens individual records for cross referencing, performing transactions, making additions, and other activities that are part of daily records management.

Details of This System

Opens a selected masterkey system for manual code additions, pin segment calculation, work slip printing, selectivity building, and other system maintenance activities.

Doors

Keeps record of all doors, along with the locks and door hardware installed on them. Cross references to Departments, People, and Keys.

Door Types

Creates a list of types (wood, glass, etc.) needed for door records so that they are available automatically during door record entry. Door types can also be added manually as part of each door record entry.

Edit

Modifies any record's primary information (the information entered when the record was first created).

Email / AD Sync Scheduler

Email: Schedules the time of day when emails are sent for items due.

AD Sync: Schedules the time for recurring synchronization with Active Directory in order to update people records.

Email Notifications

Creates email messages for distribution when items are issued, returned, or due for return. Configure recipients, add text, and clone one email setup for multiple conditions.

People Titles

Creates a list of titles needed for people records so that they are available automatically during people record entry. People titles can also be added manually as part of each person's record entry.

People Types

Creates a list of types needed for people records so that they are available automatically during people record entry. People types can also be added manually as part of each person's record entry.

Home

Returns users to the home screen of Keystone Web, which is also the Dashboard screen.

Hooks

Sequentially numbered storage hooks in a security cabinet designed to quickly locate a key, keyring, etc. Hooks may also be used to represent any identifiable/labeled storage space.

Keymark Status

Creates a list of statuses to populate the Status drop-down selection in Keymark records. Keymark statuses can also be added manually in Keymark records.

Keyrings

Keeps track of all keyrings in use. Current disposition of each keyring is displayed and a history is stored for each keyring record as the keyring is issued to people, returned, stored in a cabinet, etc.

Keys

Keeps track of all keys in use. Current disposition of each key is displayed and a history is stored for each key record as the key is issued, returned, stored in a cabinet, etc. Optional serialization helps to identify all keys, including multiple keys cut to the same code.

Keystone Support

Contact information for technical support.

Keyways

Creates a list of keyway names to populate the Keyway drop-down selection in Keymark records. Keymark statuses can also be added manually in Keymark records.

License Activation

Enter a license key provided by Keystone Support to activate a fully licensed version of Keystone Web.

Facility Zones

Creates a list of Facility Zones (Zone Maintenance Areas) to populate the Facility Zone drop-down selection in Building records. Facility Zones can also be added manually in Building records.

Maintain List

The Maintain List sub-menu contains People Types, People Titles, Door Types, Facility Zones, Keymark Status, Keyways, Product Manufacturer, Manage Locations, Manage Users, and Set Password Rule.

Manage Locations

Provides summary and details of items due per location, allows for addition of notes on locations and editing of each location's primary information (name and description).

Masterkey

Maintains all masterkey system records. Calculates pin segments and analyzes codes for phantom keys and duplicates. Cross references to Doors, People, Buildings, and Departments.

Notification

Displays items that are past due for return and sends reminder emails to recipients.

Out of Service

Organizes all items reported as lost, stolen, or destroyed.

Parts

Keeps track of all parts in use (locks, tools, signs, etc.). Current disposition of each part is displayed and a history is stored for each part record as the part is issued, installed, returned, or transferred.

Password

User-created password for secure access to Keystone Web with strong password requirements.

Set Password Rule

Configures password age (the time allowed before user passwords must be changed).

People

Keeps record of all the individuals in the organization, along with the items (keys, keyrings, etc.) issued to them. Cross references to Buildings, Doors, and Cores.

Print

Prints hard copies of screens, reports, etc.

Product Manufacturer

Creates a list of product manufacturers needed for part records so that they are available automatically during part record entry. Product manufacturers can also be added manually as part of each part's record entry.

Products

A resource list of parts (locks, hinges, cores, keys, etc.) and their manufacturer's part numbers. Parts used in the organization are created from this list to ensure continuity for reordering and maintenance requirements.

Purge

Entirely removes selected records from the database.

Reports

Generates customized, exportable reports on information and activity.

Restore Backup

Restores a backup of data into the database for stand-alone and server installations.

Return Receipts

Content management for receipts that can be printed when items (keys, keyrings, etc.) are returned.

Search

Returns records matching criteria entered by user. Searches can be across the entire database or refined to individual screens.

Serialize Config

Manages the serialization feature for items (Keys, Cores, and Parts). Serialization settings for each item type are Mandatory, Optional, or Always Blank.

Settings

The Settings screen provides access to Email Notifications, Serialize Config, Agreements, Return Receipts, Agreement Defaults, Backup Database, Configure Dashboard, Detail Defaults, AD Manual Sync, AD Sync History, and Email/AD Sync Scheduler.

Tools

The Tools sub-menu contains Cabinets, Hooks, Keyrings, Products, Parts, Out of Service, and Unassigned.

Unassigned

General storage location for items that don't have a defined disposition. Items are categorized by type (Keys, Cores, etc.).

Manage Users

Creates and edits user profiles, including purging users and modifying permissions.

User Name

Unique identification for each user. User Name and Password are the credentials necessary for access.

16 Glossary

A description of the terms used in the Keystone Web User Guide is provided below.

Backup A copy of all records from the Keystone Web database. Backups are commonly performed by IT departments on servers, so unless you have Keystone Web installed on a stand alone workstation, please check with your IT department before attempting a backup.

Cabinet Place where cores, keys, keyrings, and/or locks are stored. Cabinets, closets, file drawers, and other storage areas can be considered cabinets.

Core Interchangeable device that can be installed in a lock or door and operated by a key.

Coremark Sequence of letters and numbers that identifies a particular core.

Department Functional or other division of people at a facility. Using Keystone Web, people can be assigned to departments so Keystone Web can track access provided to each department.

Description Brief information you type when creating or editing a Keystone Web record. Descriptions can help identify people, places, and things in your records.

Destroyed One of three dispositions (in addition to lost and stolen) for an item that is out of service.

Disposition Location or condition of an item tracked by Keystone Web. An item can be:

- issued to a person
- installed in a lock (if the item is a core)
- installed in a door (if the item is a core or lock)
- attached to a keyring (if the item is a key)
- on a cabinet hook
- out of service (lost, stolen, or destroyed)
- unassigned

Door Access point in a facility. Doors, gates, and even drawers can be considered doors. A door can be assigned to a building or to an area of a building. Locks and cores can be installed in doors.

People ID Number, name, or sequence of letters and numbers used to identify a person.

Location An independent area with its own unique set of records. A location can have one or more masterkey systems. Keystone Web can manage one location or many locations.

Grandmaster	A Key that normally operates all locks in a masterkey system. However, a masterkey system might be designed so the grandmaster key does not operate selected locks, such as cash boxes, hazardous waste areas, or drug cabinets.
Hook	Place within a cabinet where cores, keys, keyrings, and locks are stored. Hooks, shelves, drawers, and storage boxes can be considered hooks.
Item	Cores, keys, keyrings, and parts.
Key	Device that operates a core or lock. A key or an electronic access device can be considered a key.
Key agreement	Document describing rules for a key issued to a person and often signed by a person. A key agreement might indicate how a person should treat the key, when the key must be returned, and what a person should do if the key is lost or stolen.
Code (Keycut)	Sequence of numbers indicating the depths to cut for a key. This code can be used to make a key for a keymark. The left-most number is the cut closest to the end of the key's blade.
Keymark	Sequence of letters and numbers that identifies a particular key.
Keymark level	Hierarchical position of a key or keymark in a masterkey system. Levels include control, grandmaster, master, submaster, and operating.
Keyring	Device that keys are attached to so that they can be carried or stored as a group.
Keystamp	Code number indicating the words stamped on all keys in a particular masterkey system. For example, "DO NOT DUPLICATE" or a company name can be keystamps.
Keyway	Letter or sequence of letters and numbers that indicates the configuration of the groove(s) along a key blade.
Lock	Security device that protects a door. In a BEST masterkey system, one or more interchangeable cores can be installed in a lock. Door locks, padlocks, cabinet locks, and other types of mechanical access control devices are considered locks.
Mark	Location of the coremark number stamped on cores in a particular masterkey system. An "F" indicates that coremarks are stamped on the face of the cores and an "S" indicates coremarks are stamped on the side of the cores.
Master	Key that operates a large group of cores or locks, such as all locks in a building, on a floor, or for a department.
Masterkey system	A complete hierarchical system provided by BEST Access Solutions. A system normally consists of keymarks and coremarks that lets a single key operate many cores, and also lets each core be operated by its own key.
Number of pins	The number of pins, or barrels in a core, or the number of cuts on a key. A BEST system is normally a 5, 6, or 7 pin system.
Operating key	Key that operates one lock or a group of locks keyed alike.
Password	Sequence of 8 to 15 characters chosen by each Keystone Web user to provide secure access to the Keystone Web system. A user must enter his or her password, in addition to his or her user name, to access Keystone Web. Normally a password should be known only by the Keystone Web administrator and the user.
Pin	Barrels in a core. The number of barrels in a core can vary, although standard Best lock cores have seven barrels.
Pin segment	Cylindrical-shaped part that fits into all barrels of a core. The sequence of varying length pin segments in a core is what permits a key to operate the core.

Report Summary of selected information in a facility's records. Keystone Web provides a variety of formatted reports. Reports can be viewed on the screen, exported to a spreadsheet or PDF, or printed.

Status Condition of a coremark, or keymark. The status of a coremark or keymark can be "IN USE," "NOT USED," "DO NOT USE," or "OTHER."

Submaster Key that operates part of a group of cores or locks operated by a related master key.

System, masterkey System comprised of keymarks and coremarks that lets a single key operate many cores, and also lets each core be operated by its own key.

System name The name of a masterkey system. The name can be any designator, such as "System A," or "BEST system."

System type The type of masterkey system, i.e. the rules and parameters that govern how codes are generated for a masterkey system. BEST system types are called A2, A3, and A4.

Unassigned A possible disposition for an item. If an item is not issued to a person, installed in a lock or door, attached to a keyring, on a cabinet hook, or out of service (destroyed, lost, or stolen), it is considered unassigned. When a core is installed in a lock and the lock is unassigned, the core is considered to be both installed in the lock and unassigned. When a key is attached to a keyring and the keyring is unassigned, the key is considered to be both attached to the keyring and unassigned. When a record is created for an item, the item is initially considered unassigned even if its disposition is immediately changed.

User A person who has access to Keystone Web.

User Name Name or number that identifies a person who uses Keystone Web. A user must type his or her user name, in addition to his or her password, to access Keystone Web.

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