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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.

<table>
<thead>
<tr>
<th>Feature</th>
<th>Feature Value</th>
<th>Search Result</th>
</tr>
</thead>
<tbody>
<tr>
<td>Doors</td>
<td>910</td>
<td>Dock Storage Cold and Frozen</td>
</tr>
</tbody>
</table>

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.

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.

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.

![Add Master Level Keymark](image)

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**.

![Add Master Level Keymark Table](image)
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.

![Add Master Level Keymark](image)

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.

![ADD MASTER LEVEL KEYMARK](image)

**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.

<table>
<thead>
<tr>
<th>System Type</th>
<th>Pins</th>
<th>Keymark</th>
<th>Mark</th>
<th>Keystamp</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>User Guide</td>
<td>A2</td>
<td>X10W</td>
<td>5</td>
<td>09080D</td>
<td></td>
</tr>
</tbody>
</table>

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.

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

<table>
<thead>
<tr>
<th>Door Number</th>
<th>Building</th>
<th>Area</th>
<th>Door Type</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>101</td>
<td>Brooking center</td>
<td>First floor, west</td>
<td>Free Door</td>
<td></td>
</tr>
</tbody>
</table>

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."

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

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.

**Add Department**

Find: □

<table>
<thead>
<tr>
<th>Department</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Executive Support</td>
<td></td>
</tr>
</tbody>
</table>

**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.
- **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.

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.

```
Dear Tina R. Prandel,
 Please note that the following items have been issued to you:

<table>
<thead>
<tr>
<th>Item Type</th>
<th>Item Name</th>
<th>Quantity</th>
</tr>
</thead>
<tbody>
<tr>
<td>KEY</td>
<td>A1_1</td>
<td>1</td>
</tr>
</tbody>
</table>

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.

```
Select Item
```

**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. 
```
Clone settings from
```
2. 
```
Select Item
```
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. **Manual Settings for Category**

2. **Select Item**

   Key

   **Clone settings from**

   Manual Settings for Category

   Issued

   **Clone To**

   Returned Due

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@rgyte.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.

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 keying 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 8:**
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 9:**
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.

<table>
<thead>
<tr>
<th>Item/Category</th>
<th>Email Scheduling Enabled?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Keys/Issued</td>
<td>No</td>
</tr>
<tr>
<td>Keys/Returned</td>
<td>No</td>
</tr>
<tr>
<td>Keys/Due</td>
<td>Yes</td>
</tr>
<tr>
<td>Cores/Issued</td>
<td>No</td>
</tr>
<tr>
<td>Cores/Returned</td>
<td>No</td>
</tr>
<tr>
<td>Cores/Due</td>
<td>Yes</td>
</tr>
<tr>
<td>Keyrings/Issued</td>
<td>No</td>
</tr>
<tr>
<td>Keyrings/Returned</td>
<td>No</td>
</tr>
<tr>
<td>Keyrings/Due</td>
<td>Yes</td>
</tr>
<tr>
<td>Parts/Issued</td>
<td>No</td>
</tr>
<tr>
<td>Parts/Returned</td>
<td>No</td>
</tr>
<tr>
<td>Parts/Due</td>
<td>Yes</td>
</tr>
</tbody>
</table>

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.
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.

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.

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 People 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.

```
Choose Dates From Date 10/22/2017 To Date 10/23/2017 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.
# 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.

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

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 Table]

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.

![People With Access To Doors Report]

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.

![People With Access To Doors Report]

![People With Access To Doors Report]
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.

EDIT REPORT

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.
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.

<table>
<thead>
<tr>
<th>Hook</th>
<th>Security</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hooks</td>
<td>5</td>
</tr>
<tr>
<td>Cabinet</td>
<td>Sample Cabinet</td>
</tr>
</tbody>
</table>

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.

| Hook 2 | Cabinet: Sample Cabinet |

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 "1A1JKS208KS800," 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).

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.

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.

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.

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.
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.

![Find Keyring(s) to Transfer](image)

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.

![Transfer Keyring(s)](image)

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.
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.

![Add Key Screen](image)

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.

![Attach Key(s) Screen](image)

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.

.Activity Log will report activity for periods selected below, for the past 180 days. You may also use the date range fields to show activity for a portion of the 180 days.
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.

ADD DOOR TYPE

<table>
<thead>
<tr>
<th>Door Type</th>
<th>Fiberglass</th>
</tr>
</thead>
</table>

SAVE CANCEL

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.

[Images of Location Details screen showing Items Due, Summary, and Notes]

Note: See the “Alerts” section on page 66 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.
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.

<table>
<thead>
<tr>
<th>TRANSACTIONS PERMISSIONS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Transactions</td>
</tr>
<tr>
<td>Issue new key</td>
</tr>
<tr>
<td>Return a key</td>
</tr>
<tr>
<td>Issue existing key</td>
</tr>
<tr>
<td>Transfer a key</td>
</tr>
<tr>
<td>Attach new key</td>
</tr>
<tr>
<td>Detach a key</td>
</tr>
<tr>
<td>Attach existing key</td>
</tr>
<tr>
<td>Install new core</td>
</tr>
<tr>
<td>Remove a core</td>
</tr>
<tr>
<td>Install existing core</td>
</tr>
<tr>
<td>Transfer a core</td>
</tr>
<tr>
<td>Issue new core</td>
</tr>
<tr>
<td>Return a core</td>
</tr>
<tr>
<td>Issue existing core</td>
</tr>
<tr>
<td>Issue new keyring</td>
</tr>
<tr>
<td>Return a keyring</td>
</tr>
<tr>
<td>Issue existing keyring</td>
</tr>
<tr>
<td>Transfer a keyring</td>
</tr>
<tr>
<td>Install new part</td>
</tr>
<tr>
<td>Remove a part</td>
</tr>
<tr>
<td>Install existing part</td>
</tr>
<tr>
<td>Transfer a part</td>
</tr>
<tr>
<td>Issue new part</td>
</tr>
<tr>
<td>Return a part</td>
</tr>
<tr>
<td>Issue existing part</td>
</tr>
</tbody>
</table>

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.

<table>
<thead>
<tr>
<th>LOCATION MANAGEMENT</th>
</tr>
</thead>
<tbody>
<tr>
<td>Location</td>
</tr>
<tr>
<td>South Campus</td>
</tr>
<tr>
<td>Main Campus</td>
</tr>
<tr>
<td>Community College Campuses</td>
</tr>
</tbody>
</table>
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

<table>
<thead>
<tr>
<th>Item</th>
<th>Item Name</th>
<th>Due Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>PART</td>
<td>11-C Soldering Iron</td>
<td>02/08/2018</td>
</tr>
</tbody>
</table>

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.

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.

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

<table>
<thead>
<tr>
<th>Item</th>
<th>Item Name</th>
<th>Due Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>KEYRING</td>
<td>6514289</td>
<td>01/12/2018</td>
</tr>
</tbody>
</table>

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.
**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.

![People Detail Grid]

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

![Notify Users Button]

**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.

![Notify Users Window]
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.

<table>
<thead>
<tr>
<th>Item Type</th>
<th>Item Name</th>
<th>Quantity</th>
</tr>
</thead>
<tbody>
<tr>
<td>KEY</td>
<td>2-3-1</td>
<td>3</td>
</tr>
</tbody>
</table>

Please return to Lock Shop in Hasley 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.

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

- **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.

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

- **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).

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

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.

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.

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.

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.

Keys
Keeps track of all keys in use. Current disposition of each key is displayed and a history is stored for each keying 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.

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.

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.

Keystones
Contact information for technical support.
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.

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.

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).

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.

Unassigned
General storage location for items that don’t have a defined disposition. Items are categorized by type (Keys, Cores, etc.).
A description of the terms used in the Keystone Web User Guide is provided below.

### Glossary

**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.