# ProMaster Key Manager

*by WH Software Limited*

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**About**

# Part

**1**

# 1 About

Welcome to ProMaster Key Manager version 7 and thank you for choosing ProMaster Key Manager.

ProMaster Key Manager is designed with the security conscious client in mind.  It is designed to assist you with the recording, monitoring and maintenance of your security access key system.  At any point, ProMaster Key Manager will be able to tell you the complete who, what, when and why of all your keys in your security system.

ProMaster Key Manager can be used as a standalone program which enables you to enter in your own key systems and have control of all your organisation's keys.   ProMaster Key Manager can also give you complete key ordering and issue control over restricted key systems that are maintained by your locksmith.  In the latter case, your locksmith will provide you with data whenever your system changes.

It can be used on a stand-alone machine or networked on a LAN (Local Area Network).

We are confident you will find it an easy and enjoyable program to use.  Any suggestions/comments for improvements in future versions are welcome, and may be addressed via email to support@whsoftware.com

**Copyright notice**

# Part

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# 2     Copyright notice

Copyright © 2016 WH Software Limited

All rights reserved.

Licensed material - program property of WH Software Limited. Law strictly prohibits unauthorised use, duplication or distribution.

ProMaster Key Manager™ is a trademark of WH Software Limited.

**Disclaimer**

**License**

Full license agreement: The ProMaster Key Manager installation program includes the full license agreement, which you must read and agree to in order to continue the installation. After installation, the license agreement may be read by clicking the menu Help then License on the main application window.

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**Contacting WH Software Limited**

# Part

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# 3     Contacting WH Software Limited

| | |
|---|---|
| Mailing address: | WH Software Limited<br>P.O. Box 300-655<br>Albany<br>Auckland 0752<br>New Zealand |
| Website: | WH Software Limited maintains an Internet site on the worldwide web.<br>The URL of this site is: http://www.whsoftware.com<br>This site has product information and product updates for download.<br>As with any Internet site, it changes frequently, so visit it often. |
| Email: | For sales and pre-sales related questions send email to sales@whsoftware.com<br>For technical questions send email to support@whsoftware.com |

**Introduction**

# Part 4

# 4 Introduction

## 4.1 Using this guide

This user guide covers the use of ProMaster Key Manager.

This guide is for anyone who installs, uses or administers ProMaster Key Manager.

It teaches you how to add and maintain your own key systems, work with key systems from your locksmith, order keys, issue and return keys, manage risk of lost keys and various other activities.

### Assumptions

The assumption is made that:

- All computers involved meet the hardware requirements

- The installer is familiar with and confident using Microsoft Windows

- The installer has administrator access on the computers where the installation is to be performed

## 4.2 Product editions

There are two editions of ProMaster Key Manager available. ProMaster Key Manager Premium gives a wealth of features and allows for multiple users in a networked environment. ProMaster Key Manager Basic gives a solid set of functionality for single user installations.

Throughout this documentation you will references to Premium and Basic to identify functionality and requirements specific to each edition.

**Installing**

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**5**

# 5 Installing

## 5.1 Architecture overview

### Basic edition overview

ProMaster Key Manager Basic edition is completely self contained on a single computer. It uses a Firebird database like the Premium edition, but operates with the database embedded engine rather than the client server engine.

No TCP/IP connectivity is used other than the initial internet access for product activation.

### Premium edition overview

ProMaster Key Manager Premium edition is a client-server application, with the back-end using a Firebird database and the Firebird database engine. Communication between the client processes and the server are performed using TCP/IP.

One machine is designated as the server, and this machine hosts the database and the Firebird database engine. All clients (both other computers running ProMaster Key Manager and also ProMaster Key Manager running on the server) communicate with the Firebird database engine via the TCP/IP networking protocol.

No direct communication with the database file is performed, so client machines do not need physical file access to the database.

The server must always be available so that the workstations are able to access your ProMaster Key Manager database. The server must be protected from unplanned restarts and power outages.

You should install ProMaster Key Manager on the server before you install ProMaster Key Manager on the workstations.

The ProMaster Key Manager program communicates with its processes running on your server on TCP port 30632 and TCP port 30633

> **Premium edition:** A common installation mistake is to assume that for ProMaster Key Manager to operate, the database on the server must be made accessible to the client machines by using a Windows Share. This is not correct. **Do not create a Windows Share to make the database file accessible to the client machines.** All communication is performed using the TCP/IP networking protocol to the Firebird database engine. The Firebird database engine, which resides on the server where the database is located performs all file operations on the database.

## 5.2 System requirements

### ProMaster Key Manager Premium hardware requirements

This product edition is installed on a single network server (which may for small installations be used also as a workstation) and a portion of the product can be installed on workstation computers for each user. All parts of the program and also the program database are located on the network server, and a portion of the program is located on each workstation.

**The minimum server computer hardware requirements are:**

| Requirement | Minimum | Preferred minimum |
|---|---|---|
| Windows version | Windows 7<br>Windows 8/8.1<br>Windows 10<br>Windows 2008/2008 R2<br>Windows 2012/2012 R2<br>Windows 2016 | Windows 2008/2008 R2<br>Windows 2012/2012 R2<br>Windows 2016<br>Servers should use a server operating system |

| CPU | Pentium, 2 cores minimum | i7 or XEON |
|---|---|---|
| RAM (available) | 2GB | |
| Hard disk drive space | 500MB | According to the size of your database and sufficient space to leave 14 days backup on the server. |
| Mouse or other pointing device | | |
| Display | 1024 x 600 24 bit colour | |

**The minimum workstation computer hardware requirements are:**

| Requirement | Minimum | Preferred minimum |
|---|---|---|
| Windows version | Windows 7 Windows 8/8.1 Windows 10 | |
| CPU | Pentium, 2 cores minimum | i5 |
| RAM (available) | 1GB | |
| Hard disk drive space | 100MB | |
| Mouse or other pointing device | | |
| Display | 1024 x 600 24 bit colour | 1920 x 1080 24 bit colour |
| Printer | Windows supported printer is required for reports | |

**ProMaster Key Manager Basic hardware requirements**

This product edition is installed on a single workstation and does not have any components installed on a network server. All parts of the program and also the program database are located on the workstation.

**The minimum workstation computer hardware requirements are:**

| Requirement | Minimum | Preferred minimum |
|---|---|---|
| Windows version | Windows 7 Windows 8/8.1 Windows 10 | |
| CPU | Pentium, 2 cores minimum | i5 |
| RAM (available) | 1GB | |
| Hard disk drive space | 500MB | According to the size of your database and sufficient space to leave 14 days backup on the server. |
| Mouse or other pointing device | | |
| Display | 1024 x 600 24 bit colour | 1920 x 1080 24 bit colour |
| Printer | Windows supported printer is required for reports | |

**Notes about hardware requirements**

- Ensure the most recent service pack for your operating system is installed.

- System requirements are minimum requirements and good performance depends on ensuring your hardware and networking reflect your usage style and resources required by other running applications.

**Networking protocol requirements (Premium edition only)**

ProMaster Key Manager Premium requires that the TCP/IP networking protocol be installed and functioning correctly.  Normally this is done as part of installing Windows.  If you do not have TCP/IP installed and correctly configured then you should install it before proceeding with the installation.  See your Windows documentation or systems support person for help installing TCP/IP.

**Firewall software (Premium edition only)**

Firewall software is increasingly popular to help protect from malicious computer attacks.  If you are running any type of firewall software you must ensure that it allows ProMaster Key Manager to communicate on TCP port 30632 and port 30633.

If ProMaster Key Manager is unable to communicate with its database (on the network server), try disabling your firewall software to identify the source of the problem.

# 5.3    Installing ProMaster Key Manager

**Before You Begin**

- Make sure your computer meet the minimum requirements

- Make sure you have your ProMaster Key Manager registration information

- Make sure you understand what type of installation you want to perform

- Make sure you have administrator or equivalent access to each computer

> When installing ProMaster Key Manager Premium edition, always install the server first.

**Starting ProMaster Key Manager Setup**

- Start your computer and log in if necessary.

- Insert your ProMaster Key Manager CD into your CD-ROM drive.

- If Windows automatically detects the CD then ProMaster Key Manager Setup will appear. Otherwise, click Start, and then Run. At the prompt, type the following command, replacing **d** with the letter assigned to your CD-ROM drive:

**d:\KM7Setup.exe**
**Press ENTER.**

- Follow the instructions that appear.

> You must choose the correct installation type (Premium or Basic) that matches your product license. The product license will not operate with the wrong type of installation.

# 5.4    File locations

The folder locations used by ProMaster Key Manager depend on a number of factors including:

- The type of installation that you performed.

- Any choices you made to change the default installation locations.

- The Windows operating system that you are running.

This topic describes the default locations.

For purposes of this illustration the following assumptions are made:

- The standard Windows locations are being used and that you are running an english language version of Windows.

- The login name of our user in this example is joebloggs.

For information on the files installed to each location see the topic Description Of Files Installed.

| Purpose Of Location | Installation Types | Folder Location |
|---|---|---|
| Main location of application | All | C:\Program Files\WH Software\KM7 (and various sub folders) |
| Shared settings, settings used by background processes, logs created by system and background processes | All | C:\ProgramData\WH Software\KM7 |
| User specific settings, user data cache, logs created by user processes, user dictionaries | All | C:\Users\joebloggs\AppData\Local\WH Software\KM7 |
| Database | Premium: Server Basic: Workstation | C:\ProgramData\WH Software\KM7\Data |
| Database engine | Premium: Server | C:\Program Files\WH Software\KM7\FB |
| Database engine | Basic: Workstation | C:\Program Files\WH Software\KM7\FBE |
| Database client connectivity | Premium: Workstation | C:\Program Files\WH Software\KM7\FB |

## 5.5 Description of files

During the installation process, various files are installed on your computer. The following explanation describes the most important files and in doing so assumes that the default locations were used during the installation. See the topic File locations$^{12}$ for an overview of folder locations and differences between folder location on various versions of Windows.

**Location: C:\Program Files\WH Software\KM7\Bin**

| File | Description |
|---|---|
| KM7.exe | The main application file for ProMaster Key Manager |
| KM7.icd | Configuration file |
| KM7Back.exe | Database backup program |
| KM7Upg.exe | Application upgrade helper |
| DelZip192.dll | Application support file |

**Location: C:\Program Files\WH Software\KM7\Data**

| File | Description |
|---|---|
| KM7.fdb | ProMaster Key Manager database |

**Location: C:\ProgramData\WH Software\KM7**

| File | Description | Notes |
|---|---|---|

| | | |
|---|---|---|
| KM7.ini | Application settings shared by all users and application settings for background processes (KM7Back) | This is where the database connections are configured. Other than configuring database connections, there should be no need to edit this file manually. |
| Log\KM7Back.log | Log file created when a database backup is run in "auto" mode. | Server only. |

**Location: C:\Users\joebloggs\AppData\Local\WH Software\KM7**

| File | Description | Notes |
|---|---|---|
| KM7.ini | Application settings specific to this user | All settings are configurable in KM7 so this file should not be edited manually. |
| Log\KM7.log | Log file created when this user performs a database upgrade. | This operation should only be performed on the server (central or remote), so the only place this file should be created is on your server. |
| Log\KM7Back.log | Log file created when this user runs a database backup. | This operation should only be performed on the central server, so the only place this file should be created is on your server. |
| Spell\Custom.adu | Custom spelling settings | |
| Spell\SuggestionLearn.adl | Custom spelling settings | |

**Using ProMaster Key Manager for the first time**

# Part

# 6

# 6 Using ProMaster Key Manager for the first time

## 6.1 Navigating

Throughout this guide the assumption is made that you are confident using Windows, selecting menu items, clicking buttons, tabbing between controls etc.

For the sake of simplicity, this guide uses concise ways to refer to various actions. Because there are many ways to use Windows, the user is expected to perform many of these tasks in the way that they feel most confident.

Here are some examples:

### Navigating menus

If this document says, Choose the menu option **System** then select **Orders,** you could do this in any of the following ways:

- Click your mouse on the menu **System** then when the drop down menu appears click your mouse on the menu **Orders**

Or

- Using your keyboard press **Alt-S** for the **System** menu then **O** for the **Orders** menu.

Or

- Press **Ctrl-J** because that is the short cut key to perform the Orders action.

### Navigating windows

### Moving around

The **Tab** key on your keyboard moves forward between fields.

### Buttons

Click a button means; Either click the button with your mouse, or **Tab** to the button so it is the active control and press the **Enter** key on your keyboard, or **Tab** to the button so it is the active control and press the **Space Key** on your keyboard, or if there is a hot key for the button you may press that key combination.

Now that's a whole lot of different ways to use that button, but the real point here being that while the documentation refers to clicking a button, often the better way is to use the keyboard, especially if it is only a couple of key presses away from where you are. You certainly would not want to read the previous paragraph over and over again!

### Check boxes

Checks boxes, may be referred to as flags or options throughout this document. They are called this because they are either on (they contain a tick or cross) or off (empty box). Tabbing onto them and using your **Space Key**, or clicking on them with your mouse changes check boxes.

### Drop down lists or combo boxes

Combo boxes, or drop down lists give you a list of choice for that field. A value may be selected using your mouse, or by tabbing onto the field and using your keyboard. The key combination Alt-Down Arrow makes the list drop down. Often the fastest way to make a selection is to tab onto the combo box and press the first letter of the selection.

### Default button

You may notice that many windows have one button that looks a little different to all other buttons. It may be a different colour or it may have a dark border around it. This button is called the **Default** button. The default

button is operated by the **Enter** key on your keyboard from wherever you are on the window, provided that the current control does not have a use for the **Enter** key.

> On some of the more complex windows with multiple buttons, you will notice that as you tab from one control to another the default button may change. The reason for this is to allow the Enter key to perform the most common action.

An example of this behaviour is all search windows.

As you tab between the criteria fields at the top of the window, the **Find** button is the default button. Pressing **Enter** actions the **Find** button.

After you action the **Find** button, and the results are displayed, you are positioned on the list so you can make your selection using the arrow keys on your keyboard. When you are on the list, the Find button is no longer the default button, but instead the **OK** button (or some other button) is now the default button.

This means that when you are on the list, pressing the **Enter** key will action the **OK** button and effectively choose that action on the highlighted item.

**Cancel button**

With few exceptions, when a window has a **Cancel** button, the **Escape** key on your keyboard will operate that button.

> Learning to navigate and make selections with your keyboard rather than your mouse will dramatically improve the speed with which you operate.

# 6.2 The administrator's first time

After installing ProMaster Key Manager, the first time you log in you must use the **admin** login.

The **default password** for any new user (unless domain based authentication is used), including admin is **password**.

The first thing you must enter is your ProMaster Key Manager registration information. This information is provided by your ProMaster Key Manager reseller when you make your purchase. The details must be entered exactly as they are shown on your registration sheet or the registration will not be accepted.

Proceed to configure ProMaster Key Manager by visiting these areas of the product:

- Company information 25
- Company logo for reports 25
- Application parameters 24
- Users 23
- Key holder categories 26

These are the "basics" for getting the product up and running.  Other configuration may be necessary for some users.

# 6.3 A user's first time

The first user who logs into ProMaster Key Manager will be required to activate the product.  See Activating ProMaster Key Manager 18

## 6.4 Licensing and product activation

### License Enforcement

ProMaster Key Manager maintains a record of the number of users connected. ProMaster Key Manager is licensed on a per-user basis. If you are unable to log into ProMaster Key Manager because you are attempting to use more connections than you have licenses, please contact your reseller to purchase additional licenses.

### Product Activation

ProMaster Key Manager requires **Product activation** before it becomes fully functional. Product activation is an anti-piracy technology designed to verify that the product has been legitimately licensed and thwart the spread of software piracy.

Activation is completed either directly via the Internet or by a telephone call to a customer service representative.

Activation on your server: Your ProMaster Key Manager installation is activated on and locked into your server. The first user to log into ProMaster Key Manager other than the ser must perform the activation.

Activation can be achieved in one of the following ways:

- Over the internet direct to the WH Software Limited activation server

- Via your web browser to the ProMaster Key Manager web site activation page

- By telephone to your reseller or to a ProMaster Key Manager representative

## 6.5 Activating ProMaster Key Manager

If your computer is internet connected, always choose the option to perform the activation automatically as this will allow you to perform the activation without waiting for assistance. If you are not internet connected, choose the manual option and call WH Software Limited while you are in front of your computer.

If the automatic activation is successful, you will be able to use ProMaster Key Manager immediately.

For a manual activation, the WH Software Limited customer service representative will ask you for the information presented by ProMaster Key Manager and on verification will read to you an activation code to enter into ProMaster Key Manager.

> The best option is to do the activation automatically. Manual (telephone) activation should be used only when automatic activation is not available.

# Administering ProMaster Key Manager

# Part

# 7

# 7 Administering ProMaster Key Manager

## 7.1 Database upgrades and backups

### 7.1.1 Database upgrades

Periodically, updates are made available for ProMaster Key Manager. These updates add new functionality and rectify anomalies.

Updates are always in the form of a setup program that installs a new version of the ProMaster Key Manager program and any necessary support files.

For the Premium edition, updates must be installed only on the server. During the update process other users must not be using ProMaster Key Manager. When workstations log into ProMaster Key Manager subsequent to the update they will be upgraded automatically.

When the update is installed, ProMaster Key Manager is run automatically and you are taken to the **Database Upgrade Wizard**. The tasks shown in the **Database Upgrade Wizard** vary depending on the version you have installed and the previous version that was in use.

You need to know the **Admin** password to apply database updates.

The database upgrade window may also be accessed from the **Tools** menu when you are not logged in. This is necessary only if for some reason the update does not complete during its installation.

> Both the installation of the update onto your server, and subsequent updates that are propagated to your workstations require administrator access to run as they write new versions of the program files on to your system.

### 7.1.2 Backing up your data

Regular backups are important. It is also very important that backups are transferred to CDROM or TAPE and then stored in a secure location away from your computer systems.

> Rule: If you don't backup it up, you have to be happy to lose it.

**Do Not Copy The Database**

Because the ProMaster Key Manager database may be used at any time by a ProMaster Key Manager user, you should never copy or backup the ProMaster Key Manager database directly unless you can be 100% certain that it will not be used while you are copying it.

The backup program provided with ProMaster Key Manager is more smart than a simple file copy. A backup created with ProMaster Key Manager backup program may be created while others are using ProMaster Key Manager.

Extending on this, do not backup the database file (the FDB file and any associated files) directly with a third party backup solution. Only ever use ProMaster Key Manager Backup to produce backups, then you may freely backup the resultant files.

**Producing Backups**

To produce a backup:

- Click the **Backup...** button.

- Select the **Environment** (most likely you have only the environment called Default)

- Alter the destination **Folder** if you wish.

- Click the **Start** button.

The file that the backup creates has a FBK file extension. Should then need arise, the backup program can be used to restore this file to reconstruct your database.

In the normal operation of ProMaster Key Manager, the option **Perform database maintenance during the backup** is an important part of maintaining a healthy and efficient database. The only times you should do a backup with this option turned off is if you plan to discard the original database and immediately restore your backup, or if you need the backup to be performed as fast as possible. This option, while important, does add a small amount of time to the backup process.

The **Verbose** option produces messages about the various stages of backup. Many messages are produced and the backup will therefore run measurably slower. There is no need to use this option unless instructed to by ProMaster Key Manager support staff.

A very large database may produce a backup file that is too large to be convenient, so the **Multi-File** backup option will split the backup into 1GB chunks. When you choose this option, an estimate is performed on the number of files needed, and because the exact size of the data in not known until the backup is complete, this may result in more backup files than required. You must not discard any files out of the backup set, even if you think they may be unrequired, as without a full set of backup files the database cannot be restored.

Backups can be configured to automatically zip the **FBK** file into a **ZIP** file. This is achieved by turning on the **Zip Backup** flag. Zipping a backup reduces the amount of disk storage required for the backup, but does use more disk space and time during the backup process. Be aware that there is a maximum file size for zip files, and therefore the backup of any large database must be split using the Multi-File option. Failure to do this may result in an unusable zip file.

### Copy The Backup To CDROM/DVD

Backup files (either those with a **FBK** file extension or the zipped backups with a **ZIP** file extension) should be copied off your computer onto permanent media such as to CDROM, DVD or TAPE. Backups should then be stored according to good business and computing practice to safeguard your data investment.

> The cost of producing permanent backups is extremely small compared to the cost of re-entering data.

### Restoring Databases

The process of restoring a backup to produce a working database will not overwrite an existing database. If it is your intention to replace your database by restoring a backup you must first locate your existing database and rename it (the existing FDB file and any associated .001, .002, .003 etc files.)

To restore a backup:

- Click the **Restore...** button.

- Click the **File...** button, and select the backup file (the FBK file). If you zipped the backup, you must first extract the backup files from the zip archive (using WinZip or similar), and if you produced a multi-file backup then all the backup files in the set must be placed in a single folder.

- Select the destination **Environment** (most likely you have only the environment called Default)

- Click the **Start** button.

The **Verbose** option produces messages about the various stages of restore. Many messages are produced and the restore will therefore run measurably slower. There is no need to use this option unless instructed to by ProMaster Key Manager support staff.

Do not use the option **Produce a multi-file restore** unless instructed to by ProMaster Key Manager support staff.

When the option **Produce a multi-file restore** is used, you must also be aware of the following restriction. With a single file database, the location of the database is not important other than that the ProMaster Key Manager configuration files point to the location of the database. Once you have created a multi-file database, the exact name and location of the database, including the drive letter and the folder in which the restore took

place become important. This is because the database files internally store a reference to where each of the database files is located.

## Configure Auto Backup

In the ideal world you would create daily backups.

ProMaster Key Manager Backup can be configured to:

- Backup multiple databases.

- Backup to one location and produce a copy of the backup at another location (e.g. another computer).

- Purge (delete) backups older than a given number of days (default 14).

To configure automatic backups:

- Click the **Configure...** button.

- Tick the **Environment**(s) to be backed up.

- Click the **Folder...** button to choose the destination folder for the backups. This must be on a local disk.

- If you wish, click the **Copy To Folder...** button and specify another destination where the completed backup files will be copied. Be aware that the backup process must have access to this location, so there is no point in choosing a remote folder that you can see when logged in as a user unless the scheduled backup process is also able to access that folder.

- Set the options. See the notes earlier about backup options.

- If you want an email notification sent when the schedule backup completes, fill in the SMTP details. All fields are mandatory. You must have an SMTP server available (and listening on the standard port 25). If your security does not allow SMTP email access you may need to make an exception rule on your email server so allow the backup program to send the email message.

| Option | Notes |
|---|---|
| Send and email notification after backup finishes | Turn this option on to enable the email to be sent |
| Server name or TCP/IP address | The same or address of your SMTP server |
| Sender's name | The name of the user used to sent the email |
| Sender's email address | The email address of the user used to sent the email |
| Recipient email address | One or more email addresses separated by a single semicolon. e.g. joe@bloggs.com;fred@bloggs.com |

- If you want to configure **Windows Scheduled Tasks** to start your backup each night, click the button **Schedule Auto Backup...**

- Finally, click **Save** to save your settings for **Auto Backups**.

## Configuring Windows Scheduled Tasks

If you wish, you may access **Windows Scheduled Tasks** via your Start button and schedule the program **KM7Back.exe** to run at a time of your bidding. If you do that, be sure to start **KM7Back.exe** with the command line parameter **-auto**

Or, take the easy way. When you click on the button **Schedule Auto Backup...**, ProMaster Key Manager Backup allows you to schedule the backup in your Windows Scheduled Tasks. To do this:

- Enter the Windows login of the user who will perform the backup. Usually on a domain this will be in the form of MYDOMAIN\Administrator.

- Enter the time each day that the backup is to run. This should be started at a time such that it will have completed before your off-site backup solution kicks in and backups the backup files produced by ProMaster Key Manager Backup.

- Turn on the flag to enable the backup.

- Click **OK** to save the schedule.

- You will be prompted for the password for the Windows user account. The password is verified against the computer or domain and on success the schedule is saved.

> If you wish to configure Windows Scheduled Tasks manually, consult your Windows documentation or Computer Consultant for information on how to configure your version of Windows for this task.
>
> **Your computer must remain on for Windows to be able to schedule tasks.**
>
> Here's a simple rule: **No power = No backup**.

Just like with a backup file that you create interactively, the backups produced when your schedule software starts the ProMaster Key Manager Backup program should be copied to CDROM, DVD or TAPE for safe keeping.

### Security

For security reasons, the ProMaster Key Manager Backup program will not allow you to backup a database located on another computer. i.e. In a network installation the backup must be performed on the server.

# 7.2 Configuring

## 7.2.1 Users

For each person who uses ProMaster Key Manager you should create a user account.

Each person then has their own login name and password, and ProMaster Key Manager tracks information about who performed changes and restricts individual user access to functionality based on the access rights that you have defined.

> Initially the admin user must configure user accounts, but you may (although not necessarily should!) give a user the ability to configure user accounts.

You may create as many user accounts as you wish. ProMaster Key Manager restricts the number of concurrent users allowed by your license, but not the overall number of users that you define.

Any user that has performed activities such as issuing keys is not able to be removed

### Getting started

- You must be logged in as the **admin** user or as a user who may configure user accounts

- From the **Setup and Admin** menu, select **Users**

### Making a change

- Use the **Add**, **Remove** and **Properties** buttons the set up your users.

### An explanation of the options

- Enter the user's **first names** and **last name**. These appear in various place and are fundamental to tracking activity on a user-by-user basis.

- Enter a unique **login name** for the user. How you chose the login will depend on the size of your organisation, but here are some examples: jb, joeb, joe.b, bloggs.j

- If you want the user to be authenticated against your Windows domain, enter the Windows Logon to which this ProMaster Key Manager logon corresponds.

> If you do not enter a **Windows Logon** then ProMaster Key Manager manages its own logon security. If you enter a **Windows Logon** for the user, then when you log onto ProMaster Key Manager the password you enter is authenticated with your Windows Security Provider as a match to the **Windows Logon** name. The format for the **Windows Logon** allows all the normal Windows syntaxes (e.g. JoeBloggs, MYDOMAIN\JoeBloggs, JoeBloggs@MYDOMAIN, JoeBloggs@MYDOMAIN.local etc). Because the **Windows Logon** is authenticated with your Windows Security Provider then any password policies you have in place will apply to the user.

- The after hours phone and email are optional.

- When you create a user, the **Active** flag should be on. You can disable a user at any time by editing that user and removing the Active flag.

**Security**

Several security flags control the functionality that is available to each user.

It is recommended that you do not give users the **Add and change users** flag, but instead that you log in as admin to perform this task.

It is recommended that you do not give users the **Remove systems** flag.  If a system must be removed, assign the right temporarily while the system is being deleted.

The **Convert locksmith systems to stand-alone systems** flag should not be granted.  On previous versions of ProMaster Key Manager, it played a role in fixing systems that had been exported and imported by your locksmith.  ProMaster Key Manager now handles this situation itself.  Grant this flag only temporarily when you decide that a system will no longer be used with a locksmith.

**System Security**

Available only in the Premium edition.  If you have set the Application Parameter[]24 "Restrict the systems that each user may access" to "Yes", then **System Security** tab will be available.  On the list, place a check mark against any systems the user is allowed access to.

**Key Cabinet Security**

If you have defined key cabinets, choose which key cabinets that the user may access by placing a check mark against the key cabinets.

> The admin user may not be altered or removed.

## 7.2.2     Application parameters

**Application Parameters** define some program behavioural characteristics that are set by the **admin** user and common to all users.

**Getting started**

- You must be logged in as the **admin** user

- From the **Setup and Admin** menu, select **Application parameters**

- Expand or collapse branches of the tree by clicking on the **[+]** or **[-]** buttons beside the folders.

- **Double Click** on the item that you want to change, make your change and click **OK**.

- When you have finished making changes, click **Save** to make them permanent.

**Notes**

- Items set to their default value are indicated by the empty page icon.

- Items that have been altered are indicated by the lined page icon.

- An item you have changed and is not yet saved is indicated with a disk icon.

- To reset an item to the default value, highlight the item and press Shift+Ctrl+Alt+Delete.

- Changes are not seen by other users until they log out then log in again.

- Right click on an item to see a menu of other functionality.

> Unless you know the application parameter you require, it is usually beneficial to search for some text in the parameter you are looking for. Use **Ctrl-F** to **Find** and **F3** to **Find next**.

## 7.2.3    Company information

Company information is displayed on the header or reports.

The company name is entered and fixed by your registration information, but you may enter address information and phone numbers.

**Getting started**

- You must be logged in as the **admin** user

- From the **Setup and Admin** menu, select **Company information**

**Editing company information**

- Enter a contact name, address, telephone and fax numbers.

- Click **OK** to save

## 7.2.4    Company logo for reports

You may include a small graphic in the top left corner of reports.

**Getting started**

- You must be logged in as the **admin** user

- From the **Setup and Admin** menu, select **Company logo for reports**

**Changing the logo**

- Click **Load logo** to select your graphic file.

- If you have a logo load and you no longer want to use it, clear it by clicking **Remove logo**.

- Click **OK** to save

**Notes**

- The logo must be a png file.  If you have a graphic in another format, you must first convert it (using a graphics editing application) to a png file.

- The logo is rendered on the reports in a 20mm x 20mm square.

- Because the logo is rendered in a square, you must ensure that your graphic is square (I.e. the height and width dimensions must be the same)

- The absolute number of pixels in your graphics file will determine the quality of the rendered image. Consider about 300 dpi to be satisfactory quality in which case the graphics file needs to be about 240 pixels high and 240 pixels wide.

> Making your graphics file excessive large will not result in a noticeable quality improvement, but will have an adverse impact on performance, particularly in printing speed and the size of any PDF files produced.

## 7.2.5    Key colours

Some locking systems support coloured key heads. Indeed some lock systems support more than one colour per key head. Where a key has more than one colour per key head, then each colour you define must also have a short name. For example, for the colour Fluro Yellow you may define a short name FlY.

When multiple colours exist on a key head, the short names are used to save space. Say you had a key with three colours: Fluro Yellow + Light Green + Black. That's rather verbose, so using the short names you define, The colour will appear something like this: Fly-LtG-Blk

### Getting started

- You must be logged in as the **admin** user

- From the **Setup and Admin** menu, select **Key colours**

### Making a change

Use the **Add**, **Remove** and **Properties** buttons to set up your colours.

Each colour name may appear only once.

> Each time a colour is used, it is referenced to the colours you define here. So, if you make a colour called Yellow, then use that colour on some keys, then later log in as admin and decide to be smart by changing the colour to Red, what you have done is alter every key that uses the colour. So to put it another way, then you click Properties to alter a colour, do so with the intention of fixing a spelling mistake or if applicable the **Short Name**, but not to completely change a colour.

### Locksmith systems

Colours required by systems imported from your locksmith are added automatically.

## 7.2.6    Key holder categories

Every key holder belongs to a key holder category.

Key holder categories help to group key holders in a logical manner, but they also allow you to define the default period to use when issuing a key, and text that will appear on reports and email messages when issuing and returning keys.

### Getting started

- You must be logged in as the **admin** user

- From the **Setup and Admin** menu, select **Key holder categories**

### Making a change

- Use the **Add**, **Remove** and **Properties** buttons to set up your key holder categories.

- Give your key holder categories meaningful names like "Permanent staff" and "Contract staff" so that it makes sense when you use them.

### An explanation of the options

The **Default issue period (day)** and **Default issue period (time)** let you define the default return time when issuing keys to key holders in the category.  Some standard choices can be set quickly by clicking the **Choose a pre-defined period** link and making a selection from the pursuing menu.

**Key Issue Text (printer)** appears on a Key Issue Responsibility Acceptance report when issuing keys.

**Key Return Text (printer)** appears on a Key Return Confirmation report when returning keys.

**Key Issue Text (email)** appears when an email is sent to the key holder when keys are issued.

**Key Return Text (email)** appears when an email is sent to the key holder when keys are returned.

**Overdue Keys Text (email)** appears when an email is sent to the key holder regarding overdue key issues.

**Key Pre-Issue Text (email)** appears when an email is sent to the key holder when keys are pre-issued. Premium edition only.

### Deposits and fees

Premium edition only.

| Data field | Description |
|---|---|
| Deposit amount | The default amount of deposit required per key and per key in a key bunch. If this value is entered then the deposit functionality will be used when issuing a key. |
| Deposit required | If the deposit amount is entered, this option controls if it may be zeroed out when issuing a key. |
| Deposit reference required | If a deposit is taken, this option determines if the deposit reference field (e.g. receipt number) must be entered. |
| Can change deposit amount | If the deposit amount is entered, this option controls if it may be altered to another value when issuing a key. |
| Can change refund amount | When returning keys, this option controls if the amount of the refund may be altered for keys that have a deposit. |
| Lost key fee | The default fee per key that has been lost. It is used when the key is marked as lost that it is on issue to a key holder. If this value is entered then the lost key fee functionality will be used when marking a key as lost. |
| Lost key fee required | If the lost key fee is entered, this option controls if it may be zeroed out when marking a key as lost. |
| Lost key fee reference required | If a lost key fee is taken, this option determines if the lost key reference field (e.g. receipt number) must be entered. |
| Can change lost key fee | If the lost key fee is entered, this option controls if it may be altered to another value when marking a key as lost. |
| Broken key fee | The default fee per key that has been broken. It is used when the key is marked as broken that it is on issue to a key holder. If this value is entered then the broken key fee functionality will be used when marking a key as broken. |
| Broken key fee required | If the broken key fee is entered, this option controls if it may be zeroed out when marking a key as broken. |
| Broken key fee reference | If a broken key fee is taken, this option determines if the broken key reference field (e.g. receipt number) must be entered. |
| Can change broken key fee | If the broken key fee is entered, this option controls if it may be altered to another value when marking a key as broken. |

### Mail-merge variables

The three email text messages allow for mail-merge functionality when then email message is generated. The parameters for the mail-merge appear in brackets. The following table shows the parameters available for each of the three purposes.

| Mail-merge variable | Description | Used by |
|---|---|---|

| [KEY_HOLDER_NAME] | Is replaced by the key holder name | Issue, Return, Overdue, Pre-Issue |
|---|---|---|
| [KEY_HOLDER_COMPANY] | Is replaced by the company | Issue, Return, Overdue, Pre-Issue |
| [KEY_HOLDER_EMPLOYEE_NUMBER] | Is replaced by the employee number | Issue, Return, Overdue, Pre-Issue |
| [PACKET] | Is replaced by the packet used when the keys are issued | Issue |
| [KEY_LIST] | Is replaced by a list of all keys and key bunches applicable to the operation | Issue, Return, Overdue, Pre-Issue |
| [DOOR_LIST] | Is replaced by a list of all doors applicable operated by keys in the operation | Issue, Pre-Issue |
| [ISSUE_TIME] | Is replaced by the issue time | Issue |
| [ISSUE_REASON] | Is replaced by the issue reason | Issue |
| [RETURN_BY_TIME] | Is replaced by the time the keys are due to be returned | Issue |
| [RETURN_TIME] | Is replaced by the time the keys were returned | Return |
| [RETURN_REASON] | Is replaced by the return reason | Return |

Premium edition only.

| Mail-merge variable | Description | Used by |
|---|---|---|
| [DEPOSIT] | Is replaced by the deposit amount and reference | Issue |
| [REFUND] | Is replaced by the refund amount, reference and details of the corresponding deposits | Return |
| [DEPOSIT_PER_KEY] | Is replaced by the deposit amount per key | Issue, Pre-Issue |
| [DEPOSIT_TOTAL] | Is replaced by the total deposit amount | Issue, Pre-Issue |

Be sure to use the mail-merge variables exactly as they appear here or they will not behave as expected.

## 7.2.7    Issue and return reasons

When keys are issued or returned, you may record a reason for the transaction.  As the same reasons are used frequently, you may setup the reasons you use so they are accessible at the time of key issue or return alleviating the need to type them each time.

**Getting started**

- You must be logged in as the **admin** user

- From the **Setup and Admin** menu, select **Issue and return reasons**

**Making a change**

- Use the **Add**, **Remove** and **Properties** buttons to set up your reasons.

Each reason is used for either issue or return as indicated by the **Type** that you select.

### 7.2.8          Issue authorise names

When keys are issued, you may record an authorising name for the transaction.  As the same names are used frequently, you may setup the names you use so they are accessible at the time of key issue alleviating the need to type them each time.

**Getting started**

- You must be logged in as the **admin** user

- From the **Setup and Admin** menu, select **Issue authorise names**

**Making a change**

- Use the **Add**, **Remove** and **Properties** buttons to set up your names.


### 7.2.9          System security

Available only in the Premium edition.  If you have set the [Application Parameter](#)□24 "Restrict the systems that each user may access" to "Yes", then this functionality will be available.

**Getting started**

- You must be logged in as the **admin** user or as a user who may configure user accounts

- From the **Setup and Admin** menu, select **Authorised users for systems**

- Select the system you want to configure

**Making a change**

- Place a check mark against all users who may access the system

- Click **OK** to save

> This window is similar in functionality to setting system security when adding users, viewed from a system selection rather from a user selection.


### 7.2.10          Signatory authentication

ProMaster Key Manager allows for key orders to your locksmith to be authenticated by each signatory used on the order.  To enable this functionality, the [Application Parameter](#)□24 "Use electronic order authorisation" must be set to "Yes".

When electronic authorisation is used, an order may be sent to the locksmith only after all signatories used by the order have entered their passwords.

The password authentication for a signatory is achieved by creating a user for each signatory and then associating each user with the corresponding signatory.

**Getting started**

- You must be logged in as the **admin** user

- From the **Setup and Admin** menu, select **Signatory authentication**

**Making a change**

- Select the signatory you want to configure

- Click the **Select user** button.

- Choose the corresponding user

- Click **OK** to save

## 7.2.11    Importing key issue holdings from a CSV file

If you have key issue data in a CSV file, it is possible to import this data to automatically issue keys to key holders.

This topic describes the process of importing a CSV key issue holding file.

Read the topic [Key issue holdings import (CSV) file format](#)[103] for more information on the file contents allowed.

**Getting started**

- You must be logged in as the **admin** user

- From the **File** menu, select **Import** then **Import key issue holdings**

**Importing**

A simple wizard steps you through the import process.

**Select the file to import**

- Click **Select file** to select the file you are importing

- Click **Next**

**File contents and operation**

The wizard shows you the first three lines of the file so that you can see how it has been parsed. From this you may determine if the file content is what you were expecting or not.

It is common for the first line of a CSV file to contain column headings. The wizard tries to determine if that is the case with the file you selected, and sets the options accordingly. If the option for the first line is not correct, be sure to check or un-check it as necessary.

Click **Next**

**Choose data columns**

The wizard looks at the column headings (if they are included in the file) and from these it attempts to determine what each column in the file is used for.

You may change the source column for each type of data. In each drop-down list, the column number, heading and first piece of data is shown.

Before proceeding you must correct any errors in the automatic column selection and also for each unassigned column make a selection for the source.

For all data types not contained in the import file the selection **Not available** must be made.

Click **Next**

**Data analysis**

A comprehensive data analysis is performed and any problems are reported.

If the analysis indicates that there are errors contained in the file, then you have the option to see the detail of those errors.

If there are errors, you must either fix the file and restart the import, of if you are happy to ignore the erroneous rows then then you can check the option to skip those rows.

Click **Next**

**Ready to finish**

A summary is displayed.

Click **Finish** to perform the import.

> If employee number is treated as the primary search field then employee number it is used for locating existing key holders, otherwise the combination of First names, last name and company is used for locating existing key holders.

# 7.3 Maintenance procedures

## 7.3.1 Make key holders with no recent activity inactive

As a periodic clean-up, you should make key holders inactive if they are no longer in use.

> Key holders with keys on issue will never be made inactive by this procedure

**Getting started**

- You must be logged in as the **admin** user
- From the **Tools** menu, select **Make key holders with no recent activity inactive**

**Key holder selection**

- There are 2 choices for the range of key holders to purge.
- Choose how recent activity will be considered for **not** making a key holder inactive.

## 7.3.2 Purge inactive key holders

As key holders leave your organisation, or possibly construction projects are completed so the contractors have left, you may wish to remove those key holders.

> Only key holders that are flagged as inactive are able to be purged.

**Getting started**

- You must be logged in as the **admin** user
- From the **Tools** menu, select **Purge inactive key holders**

**Key holder selection**

- There are 3 choices for the range of key holders to purge.
- There is an option to restrict the purging to those who have not had recent activity.  A good choice for this parameter is 3 months or more.
- Unless you turn off the flag **Do not purge key holders who have lost keys** then any key holder who has lost a key will **not** be removed.

> When you purge key holders, all history of key issue activity is lost.  If you want a permanent record you may want to consider producing reports before purging key holders.

## 7.3.3 Find and fix missing issues

In the rare event that key issues are missing, or key issues exist that should not, this is the process you need to run to fix the problem.

You may be asked to run this task if you seek technical support.

**Getting started**

- You must be logged in as the **admin** user

- From the **Tools** menu, select **Find and fix missing issues**

**Making a change**

- The first step is to choose the system you want to analyse or fix, then click **Next**.

There are three options for the operation that will be performed.

**Identify and report discrepancies but do not make any alterations**

This option reports any problems identified but does not make any changes to your data.  Please run this option before the second or third option so that you can see and understand what will happen before making any changes.

**Remove any key issues that should not exist provided they are not in use**

This option tries to remove any key issues that should not exist (various factors will prohibit the removal of the offending key issues), then any missing issues are created.

**Change the record for each key of the number of issues to be the number of issues that exist**

This option updates the key information to encompass the highest issue number found for each key, then any missing issues are created.

> The second option should fix most issues and should be used in preference to the third option which may not produce an accurate reflection of your key issues.

# Using ProMaster Key Manager

**Part**

**8**

# 8 Using ProMaster Key Manager

## 8.1 Concepts and terminology

**Terminology explained**

| Term | Description |
|------|-------------|
| User | A user is a person who uses ProMaster Key Manager.  Users must be created in ProMaster Key Manager and each time a user starts ProMaster Key Manager he or she must log in.  Users are granter permissions which restrict the activities they may perform. |
| System | A system, or key system or master key system is a logical grouping of keys and doors.  There are many different types of lock products manufactured, and even within those that look very similar there is no way that a key from one lock product will operate another.  Within a lock system, there is a relationship between all of the keys and the doors.<br>**Standalone system**: This is a system that you enter and maintain.  It works the same as a locksmith maintained system for issuing and returning keys, but all changes to the system (keys, doors, keying etc) are your responsibility.<br>**Locksmith maintained system**: This is a system that is maintained by your locksmith.  The integrity and accuracy of the system is performed using ProMaster Master Keying 7 software, and your locksmith updates ProMaster Key Manager by periodically supplying a data file which you import into ProMaster Key Manager. |
| Locksmith | Any party that uses ProMaster Master Keying 7 to maintain a master key system for you.  It may be a lock manufacturer or a locksmith. |
| Signatory | A person associated with a system who has the authority to authorise new keys to be ordered. |
| Key | Ok, it's a key.  But more importantly it is a concept.  It is important to distinguish between a key and a key issue.  A key is a **representation** of a little metal thing that opens a door, then when say 5 of them are manufactured, those 5 **real keys** are called keys issues.  so, if a system is designed with a key, and it is never manufactured, the key still exists, but there are no key issues so you cannot issue them to a key holder. |
| Door | Any locking product that is opened by keys in the system, be it a real door or a padlock. |
| Keying | The relationship between doors and keys. |
| Order | A request for keys to be manufactured.  When the keys are manufactured you then have more key issues. |
| Key issue | See the explanation of key.  A key issue is the actual key produced each time one is manufactured.  Typically a key issue is marked with the system number, key number and issue number, uniquely identifying it.  On low security systems and on legacy systems, some locksmiths choose to not mark the issue number. |
| Key bunch | A group of key issues that you make into a bunch.  This may be a real bunch, such as a key ring in prison security with the key issues secured to the ring, or it may be more of a virtual bunch, such as 20 issues of the same key that are made into a bunch so they can be issued and returned to cleaners in a single operation. |
| Key cabinet | A representation of the actual cabinet in which you store your key issues. Premium only: Multiple key cabinets may be created to represent multiple real key cabinets. |

| Key holder | A person to whom you issue keys. |
|---|---|
| Issue key | The process of giving a key issue (or key bunch) to a key holder. |
| Return key | The process of receiving back a key issue (or key bunch) from a key holder. |

**Searching for data explained**

All search screens in ProMaster Key Manager have a number search parameters at the top.

Searches are performed by entering any search information you have and clicking **Find** (Or pressing **Enter** as the **Find** button is the **default** button when you are entering the search parameters.)

Many search parameters have a search modifier that controls the way the search is performed.

> All search parameters you provide must be met for any item of data to be considered a match, so enter enough information to refine your search, but not so much that you exclude items you want to see.

After you perform the search, you are placed on the list of results where you can move up and down with the arrow keys then perform any action allowed on the selected item.

# 8.2 Logging in ProMaster Key Manager

To perform any tasks in ProMaster Key Manager, you must first log in by providing your login name and password. The environment option is available only for users who connect to more that one ProMaster Key Manager installation (it is normal to have only one choice for the environment)

# 8.3 Changing your password

Each time a user account is created, the user is assigned the default password which is password.

When a user logs in, the user is required to change their password.

> If you configure a user to use a Windows logon for authentication then the option to change the password is not available as all password security is performed by Windows or your Active Directory Domain Controller.

**Getting started**

- You must be logged in
- From the **Setup and Admin** menu, choose **Change password**.

**Changing your password**

- You must enter your old password then enter your new password twice.
- Click OK to save the new password.

# 8.4 Setting your preferences

Various characteristics of ProMaster Key Manager may be configured to the liking of the user.

**Getting started**

- You must be logged in
- From the **Setup and Admin** menu, choose **Preferences**.

**An explanation of preferences**

**For how many seconds should alert messages be displayed?**

Some areas of the program use repetitive procedures, such as adding keys or doors to a non-locksmith system. After each item is added, a message is displayed to alert you to the action that has just taken place. This option determines the duration for which these messages will be displayed.

**Show overdue keys and key bunches after you log in**

Provided you have the appropriate use permissions to view overdue key issues, you may have information about overdue key issues displayed each time you log in. This is a good option to have on as it reminds you to pursue the return of overdue keys.

**If you use a signature pad, what type is it?**

Premium edition only. When issuing keys, you may use a signature pad to capture a signature from the key holder. This setting determines the type of signature pad that you have connected. More signature pad models may be added in the future.

**Auto find**

Various areas in ProMaster Key Manager allow you to search for information. When each of these search windows is opened, whether or not all information is shown is controlled by each of the auto find options. On some search windows, particularly those where only a few items are displayed, having auto find on is useful, but when there are many items to be displayed, such as for doors and keys, is is better to leave auto find off and perform a search using criteria to identify the items you want to see.

**Email**

Three options are provided for how email messages will be delivered. Depending on what email application you are using and how it is configured you may determine that one option is better than the others. If you are using an SMTP server to deliver your email (rather than delivering it to your mail application) then you must provide the SMTP mail delivery settings.

# 8.5      Printer setup

ProMaster Key Manager remembers the printers you select and each time you print it automatically selects the correct printer.

**Getting started**

- You must be logged in

- From the **Setup and Admin** menu, choose **Printer setup**.

**Changing printers**

There are three printers that can be configured.

For each printer, choose the name of the printer then choose the paper tray which holds plain paper. If you have a printer with a single paper tray, or if all paper trays hold plain paper then you may leave the paper tray selection as **Default**.

**Standard printer**

This printer is used for almost everything, and for most users it will be the only printer used. If your printer supports duplexing, the option to print on both sides of the paper will be available.

**Large format printer**

This printer is used only for the doors report that uses the layout **Keying matrix - large format**.

**Label printer**

This printer is used when printing labels for packets.  This is available only in the Premium edition and is applicable only if you deliver issued keys to key holders in a packet.

# 8.6 Spelling preferences

ProMaster Key Manager includes a comprehensive spell checked with several dictionaries.

### Getting started

- You must be logged in

- From the **Setup and Admin** menu, choose **Spelling preferences**.

### Changing preferences

The options are self-describing and will be familiar to Microsoft Office users.  The second tab, **Language**, is where you choose the standard dictionary (E.g. English British) and where you may specify additional dictionaries including other languages, medical terms and technical terms.

# 8.7 Working with your locksmith

## 8.7.1 Systems created by your locksmith

This guide discusses a number if procedures, such as creating systems, keys and doors.  These procedures are applicable only for systems that you maintain yourself.  If you have a locksmith using ProMaster Master-Keying 7 do design and maintain your master key system, the way you work with those locksmith maintained systems is a little different.

Your locksmith can send you a data file from ProMaster Master-Keying 7 containing all the information about your system, which you can import into ProMaster Key Manager.

If you have upgraded from an older version of ProMaster Key Manager, some information required for ordering keys from ProMaster Master-Keying 7 is absent.  To update your data so that it is fully compatible with ProMaster Master-Keying 7, please ask your locksmith to send you all your ProMaster Key Manager systems from their ProMaster Master-Keying 7.  When you receive the updated files, import them all into ProMaster Key Manager.

Most likely your locksmith will send you this file by email.

You can view all aspects of the system e.g. signatories, keys, doors and keying matrix but you will not be able to alter this system at all.   Any changes to this system need to be carried out by your locksmith, after which he will send you a new data file for you to import.

The differences between systems you enter yourself and locksmith maintained systems are:

| Systems You Enter | Locksmith Maintained Systems |
|---|---|
| You create the system, enter doors, keys, keying and signatories. | Your locksmith provides you with a data file from ProMaster Master-Keying 7 that you import into ProMaster Key Manager. |
| Ordering keys is a formalisation of the process of receiving keys into ProMaster Key Manager | Ordering Keys is an essential step to receiving new keys.  After having entered an order, you may print it and give the printed and signed order to your locksmith, or alternatively enable electronic ordering, configure the signatories (as the "Admin" user), and after your signatories have authenticated the order, email your order to your locksmith.<br>Your locksmith will import your order directly into ProMaster Master-Keying 7. |

| | |
|---|---|
| Key issues are updated when you "receive" the keys into ProMaster Key Manager. | Key issues are updated when you import a data update (provided by your locksmith) into ProMaster Key Manager. |
| Signature change request is not applicable as you maintain the signatories. | A signature change request form is printed for you to submit to your locksmith. Your locksmith will keep the new signatures on file, or scan them into ProMaster Master-Keying 7 for order verification. |

## 8.7.2      Importing a system from your locksmith

### Getting started

- You must be logged in

- From the **File** menu, select **Import** then **Import from ProMaster Master-Keying**

### Importing

A simple wizard steps you through the import process.

- Click Choose files to select the file(s) you received from your locksmith.

- Click **Next**

An analysis will be performed on each file and a summary will be shown.  Any problems will be reported.

- Click **Next**

- Choose how door notes will be treated.  If you have made changes to the door notes and do not want this data updated by your locksmith, be sure to choose the option to "Do not import door notes"

- Choose how door hardware will be treated.  If you have made changes to the door hardware and do not want this data updated by your locksmith, be sure to choose the option to "Import door hardware only where you haven't changed the data"

- Choose if the files you are importing are to be removed after importing.

- Click **Finish** to perform the import.

> Another way to import a system from your locksmith is to drag the master key system file from the email message in Microsoft Outlook and drop it on the ProMaster Key Manager main window.  You must be logged in for this to work.

An import can take anywhere from a few seconds to several minutes depending on the size of the system and the speed of your computer, as well as and contributing factors such as network congestion.

### Key Cabinets

Premium edition only.  If you are using multiple key cabinets, keys must be assigned to a key cabinet before they may be issued.  This may happen automatically during the import if a default key cabinet has been assigned to the system or to the keys in the system, otherwise you must assign the key cabinet for each issue by opening the key cabinet and making the change there.

### 8.7.3 Ordering keys

*About signatories and authentication*

On a locksmith maintained system, the ordering of every key issue must be authorised by the appropriate signatories. When you have a master-key system maintained by your locksmith, you will have signatories recorded against the system. Each signatory may have access to order all keys, or only a selection of keys. Each key within the system will require one or more authorised signatories to approve the order. Both ProMaster master-keying 7, which your locksmith runs, and ProMaster Key Manager check to ensure the signatories selected for an order are sufficient to authorise the keys ordered.

*Finishing an order*

Finishing an order of a locksmith system is a little different to that of a standalone system.

After an order on a locksmith system is released, there is of course the print functionality, just like for standalone system orders.

Additionally, there is **Electronic authentication** (See Signatory authentication[29]), and also the facility to export the order to a file to send to your locksmith and to email it directly. These functions are accessed by **Send order** button.

The best way to send an order to your locksmith is by email.

> Talk to your locksmith about their preference for a signed confirmation of the order by facsimile, or if they would prefer you to use electronic authentication.

### 8.7.4 Signature change request

To change signatories on a locksmith maintained system, you must complete the paperwork for your locksmith. See Producing a signature change request form[86] for the process.

Signatory changes are made by your locksmith and appear when an update s imported from your locksmith. See Importing a system from your locksmith[38].

### 8.7.5 Receiving the order

When you receive keys ordered from your locksmith, re-open the order in ProMaster Key Manager, and click the **Receive** button.

Unlike orders for standalone systems, you have only one option and that is confirm that the order is received.

Flagging the order as received indicates that the order is not outstanding, but does not make the key issues available. The key issues are made available by importing a data update from your locksmith.

Your locksmith should provide you with a new data file to import into ProMaster Key Manager to update your key issues and synchronise your data with your locksmith's data.

> Ask your locksmith to send you a new data file via email each time they process an order for you.

## 8.8 Working with systems

### 8.8.1 Creating a new system and system details

If you are creating a new key system (not one that is maintained by your locksmith), this is how you get started.

*Getting started*

- You must be logged in

- From the **System** menu, select **New system**

## Creating a system

- The **System number** uniquely identifies a master key system, and therefore must be different to the system number of any existing systems.

- The **System description** should adequately describe the system

### Address and contact tab

- Address and contact details are optional.

### General tab

- The **Date installed** must be supplied.  For your own systems, this is only informational.  For locksmith maintained systems it becomes a useful piece of information to record the age of as key system (high security key systems have a patent on the keys etc and installation date is useful in tracking the life of a system)

- Signatory security determines how key orders are authenticated.  For your own key systems, this is generally not important, but systems provided by your locksmith may use settings here to control key ordering authorities.  Quantity per order is the default number of signatories that are required on a key order.  This may be overridden on a key by key basis.

| Type of security | Description |
| --- | --- |
| All keys require the system default number of signatories | The **Quantity per order** is the number of signatories required for each key.  Any active signatories may authorise any key.  Most key systems work like this. |
| Allow a different number of signatories required for each key | The **Quantity per order** is the number of signatories required for each key unless a key has a quantity of signatories set, in which case that quantity is used.  Any active signatories may authorise any key. |
| Individual signatory authorities + allow a different number of signatories required for each key | The **Quantity per order** is the number of signatories required for each key unless a key has a quantity of signatories set, in which case that quantity is used.  Only signatories linked to each key may authorise it being ordered.  See Key signatory authorities⌐58. |

- Colours per key turns on the ability to record 1, 2 or 3 colours per key head.  Pick the setting suitable for your key system.

- Premium edition only.  The **default key cabinet** is used when new key issues are created.  If a key does not have a default key cabinet set, the default key cabinet set for the system will be used.  If neither is set, new key issues are not placed in a key cabinet and hence may not be issued until they are moved into a key cabinet.

### Notes tab

- You may record any notes you require about the system.

### Locksmith tab

Only for locksmith maintained systems, shows the name of the locksmith for the system and allows you to set an email address for this system that will be used when key orders are created.  If an email address is not set, the default email address for the locksmith will be used.  Changing the email address can be useful when you use more than one branch of a locksmith company and some systems are maintained by one branch and others by another branch

### Design tab

Only for locksmith maintained systems, shows the system type used by the locksmith to create the key system.  This is informational only.

- Click **OK** to save the system.  The next steps are to add keys, doors and keying, then to create an order to reflect the quantity of each key that has been produced.

To modify the system later, from the **System** menu, select **System details**

> For locksmith maintained systems, the only editable fields are the default key cabinet, notes and email address for key orders.

## 8.8.2    Selecting a system

Search a system in the same manner that other ProMaster Key Manager searches are performed.

Pay attention to the **active** and **origin** settings.  Depending in where the system selection is being used, these settings may be pre-selected and unable to be altered.

## 8.8.3    Delete a system

If a system is no longer in use, you may delete it.

### Getting started

- You must be logged in

- From the **System** menu, select **Delete system**

### Deleting a system

- Select the system to be deleted

- Enter the confirmation sentence

- Click **OK** to remove the system

> System removable is irreversible.  All keys, key issues and key issue history associated with the system is removed.

# 8.9    Working with system documents

Any amount of documentation may be stored against a system.  Documentation or images or any number of supported document types (e.g. zip, rar, pdf, xps, msg, rtf, txt, doc, docx, xls, xlsx...).

Building plan documents that are PDF files are available to print when printing door reports (based on user permissions).

Alter the application parameter Default values for "System document type" selection to configure the default options for the document type.

Alter the application parameter System document type for "Plan" for the document type that defines building plans.  The default value "Plan" is a good choice but you may want to change it.  This is the parameter that controls which documents are available to print when printing door reports.

The user must have permissions to access documents - see Users[23] .

### Getting started

- You must be logged in

- From the **System** menu, select Documents

## 8.9.1      Storing documents

**Getting started**

- You must be logged in

- From the **System** menu, select **Documents**

- Search for documents in the same manner that other ProMaster Key Manager searches are performed.

**Using documents**

- Use the **Add**, **Remove** and **Properties** buttons to enter and alter documents.

When you add a document, you will be asked if you want to add a document or image.

If you are storing an image (from a file, your scanner), you will be presented with the image in the image editor where you can perform edits to the image to optimise it for readability and size.

You may drag a file from Windows Explorer or Microsoft Outlook and drop it onto the target instead of choosing a source and clicking OK to select the file. The file you drop must be one of the accepted document or image types and it must be a single file.

**Document properties**

- You must provide a **Type** for your document before you store it. The **Type** is used for easy identification of the document at a later time.

- The document description should be used to identify the document.  When printing doors by selecting an area, and choosing a document, the description is marched to the door area chosen.

The document properties may be edited at a later time, but once saved, the actual document (image, PDF, DOC etc) is immutable.

# 8.10      Working with signatories

## 8.10.1      Searching for signatories

Signatories are people who may authorise key orders.

**Getting started**

- You must be logged in

- From the **System** menu, select **Signatories**

**Using Signatories**

Search for Signatories in the same manner that other ProMaster Key Manager searches are performed.

Use the **Add**, **Remove** and **Properties** buttons to enter and alter signatories.  See

Right click on a signatory for more functionality.

Here's a few features worth noting (most are self explanatory so are not mentioned here):

| Menu choice | Description |
|---|---|
| Key authorities | Allows you to see and alter the keys that the signatory may authorise. Availability depends on the **type of security** set for the system.  See |

| Key authorities matrix | Allows you to see and alter the keys that all signatory may authorise in a matrix form.  Availability depends on the **type of security** set for the system.  See Signatory key authorities matrix 43 |
| Order history | Shows orders where the signatory has authorised the order.  See Signatory order history 43 |

For locksmith maintained systems, all information is read-only, and you may not add new signatories.

## 8.10.2    Entering signatories

See the topic Searching for signatories 42 to learn how to add signatories.

Adding signatories is a simple process, but here's a few pointers about how it works:

- Each signatory must have a unique name within the key system.

- Try to record as much information as possible as it makes locating and identifying key holders at a later time easier.

- You may save a photo of the signatory for identification.  This may be loaded from a file, captured from your scanner or pasted from the clipboard.  The image editor may be used to adjust the photo.  See Image editor 108

## 8.10.3    Signatory order history

The signatory order history shows you orders that the signatory has authorised.

See the topic Searching for signatories 42 to learn how access the signatory order history.

From this window you may open the order to see more.

## 8.10.4    Signatory key authorities

Allows you to see and alter the keys that a signatory may authorise.

See the topic Searching for signatories 42 to learn how access signatory key authorities.

**Making a change**

- Place a check mark on the keys that the signatory may order

- To duplicate the authorities from another signatory, click the link **Copy from another signatory**, then choose the other signatory

- Click **OK** to save

For locksmith maintained systems, all information is read-only

## 8.10.5    Signatory key authorities matrix

The signatory key authorities matrix shows you all keys and signatories in a system, indicating which keys may be ordered by each signatory.  For locksmith systems changes are not allowed, but on stand-alone systems you may use the signatory key authorities matrix to define which keys may be ordered by each signatory.

See the topic Searching for signatories 42 to learn how access the signatory key authorities matrix.

**Using the signatory key authorities matrix**

Click the options button to change:

- The orientation of keys and signatories

- What is shown for keys

- What is shown for signatories

- What is highlighted (e.g. Highlight unassigned keys and signatories)

Find signatory and Find key may be used to locate signatories and keys.

Right click on the matrix for more functions and to see keyboard shortcuts.

### Making a change

- Click on the intersection of a key and signatory to turn on or off check mark at that position.  Alternatively you may navigate the matrix with your keyboard and use the space key to make the change.

- Click **OK** to save

> For locksmith maintained systems, all information is read-only

## 8.11 Working with keys

### 8.11.1 Searching for keys

#### Getting started

- You must be logged in

- From the **System** menu, select **Keys**

#### Using keys

Search for keys in the same manner that other ProMaster Key Manager searches are performed.

On small systems, it is practical to find all keys then scroll down the list to the key you require.

Not so when you are working with hundreds or even thousands of keys, as this way of operating becomes terribly inefficient as it is very time inefficient to peruse a long list to isolate a particular key.

ProMaster Key Manager offers a broad range of search criteria from which you may enter as little or as much information as you require, then click the **Find** button to show keys that match your criteria.

Use the **Add**, **Remove** and **Properties** buttons to enter and alter keys.  See Entering keys[45]

Right click on a key for more functionality.

Here's a few features worth noting:

| Menu choice | Description |
|-------------|-------------|
| Issues | Shows the individual issues of the key.  Issues are added when you order and receive keys, or for locksmith maintained systems when you receive an update from your locksmith.  See Key issues[46] |
| Doors | Shows which doors the key operates.  See Key access[47].  To change keying, see Keying matrix[54] |
| Order history | Shows orders where the key has appeared on.  See Key order history[47] |
| Keying matrix | Allows you to see and alter the keys that operates each door in a matrix form.  See Keying matrix[54] |
| Bulk change | Allows many keys to be changes in a single operation.  See Bulk change keys[47] |
| Sort | Allows keys to be sorted into a different order.  See Sorting keys[48] |

For locksmith maintained systems, almost all information is read-only, and you may not add new keys

## 8.11.2     Entering keys

See the topic Searching for keys [44] to learn how to add keys.

Each key (but not each **Issue** of a key), has a unique key number.

### Explanation of data fields

| Data field | Description |
|---|---|
| Key number | The number that uniquely identifies this key within the master key system. Each key (but not each **Issue** of a key), has a unique key number. |
| Description | A description of the key to give it meaning beyond that attributed to the key number. |
| Category | Category allows you to perform basic grouping on keys. This information has no meaning beyond grouping keys together into a logical group and for searching purposes. |
| Key above | The key above specifies the key above this key in hierarchy. The top level key in a system will have no keys above. See the notes below on understanding key designations and hierarchy. |
| Designation | The key designation specifies the keys purpose. See the notes below on understanding key designations and hierarchy. |
| Head colour | If you have specified that the key head has colours (See Creating a new system and system details [39]) then 1, 2 or 3 drop down lists will be available for key head colour selection. See Key colours [26] to define the available colours. |
| Number of signatories required | If you have defined your system security to allow this (See Creating a new system and system details [39]), then you may enter a number of signatories required to order this key. |
| Risk | Premium edition only, and only if it has been enabled in the Application parameters [24]. May be altered for locksmith maintained systems as well as your own systems. Allows you to categories keys so that if they are lost you may produce more meaningful risk-related analysis. Used when reporting on compromised doors [85]. |
| Key cabinet | Premium edition only, and only if you have multiple key cabinets defined. May be altered for locksmith maintained systems as well as your own systems. This defines the key cabinet that key issues of this key will be added to when they are created. This value overrides any value set as the system default. |
| Notes | May be altered for locksmith maintained systems as well as your own systems. General notes about the key. |

### Understanding key designations and hierarchy

When entering your own system, **key above** and **designation** are not very important - they serve only to further document the master key system. On locksmith maintained systems they can form an important part of maintaining the system coding.

#### Key above

In a system, the top level key will not have a **key above**. All other keys should be assigned a **key above** that complies with the following rules.

- Any key that is a **key above** for another key must be designation **Master**.

- If key A is above key B, then key A must operate all doors operated by key B. Or put another way, key B must not operate any doors that are not operate by key A.

- If a key is not the **key above** another key, then it's designation must not be **Master**.

**Designation**

| Designation | Description |
|---|---|
| Master | A **Master** key fits into a pure hierarchal layout and is the **Key above** for one or more other keys |
| Change | A **Change** key is a bottom level key that fits into a pure hierarchal layout. A Change<br>key must not be the **Key above** for another key. |
| Selective | A **Selective** key does not fit into a pure hierarchal layout. A **Selective** key must not<br>be the Key Above for another key. |
| Construction | A Construction key is used on some master key  systems during building construction.  After construction is complete the key is no longer able to operate the doors. |
| Control | The Control key available only on interchangeable core, lock systems for disassembling the cylinder. |
| Hotel | The Hotel key is used in some Schlage systems to designate the hotel emergency override key. |

**Adding multiple keys**

When you are adding keys, click **Save and add another**.  ProMaster Key Manager will save your key, leaving the window open for another key to be added, and some fields will retain the values you entered (E.g. Colour, designation) while others (Key number, Description) are progressed automatically.  When adding a whole bunch of contiguously numbered keys, this is extremely useful.

## 8.11.3     Key issues

See the topic Searching for keys[44] to learn how to see the issues of a key.

All issues of the selected key are shown.  Right click on the list for options to restrict the view of key issues by status.

If the key issue has additional information (E.g. It is on issue), then that will be shown also.

Right click on the key to access a menu with more functionality.

Here's a few features worth noting:

| Menu choice | Description |
|---|---|
| Holding | If the key is on issue, this will show the holding.  See Key issue holding[59] and Key bunch holding[60] |
| Bunch | If the selected issue is a member of a key bunch, this will show the key bunch and other key issues on that bunch. |
| Key has been lost | Access the Lost and broken keys[61] wizard to record the selected key as lost. |
| Key has been broken | Access the Lost and broken keys[61] wizard to record the selected key as broken. |

### 8.11.4 Key access

See the topic [Searching for keys](#)⌐44 to learn how to see key access.

The key access window is available from various places in ProMaster Key Manager.

Key access shows the doors that a key will operate.

For each door you may see the keying (I.e. the keys that operate that door). See [Door keying](#)⌐51.

You may print a keys report for the key by clicking the **Print keys and doors** button.  See [Reporting on keys](#)⌐79.

### 8.11.5 Key order history

The key order history shows you orders that included the key.

See the topic [Searching for keys](#)⌐44 to learn how access the key order history.

From this window you may open the order to see more or print the key order history report (See [Reporting on key order history](#)⌐87)

### 8.11.6 Bulk change keys

Bulk changing is the process whereby you may apply the same change to a few or even many keys in a single operation. It is particularly useful for tasks such as changing the **Key Above** and **Designation** on a number of keys when you have entered them without this information or to rapidly fix data errors.

**Getting started**

- See the topic [Searching for keys](#)⌐44 to learn how to access keys

- Search for the keys you want to include in the bulk change operation

- Click on the link **More tasks** then choose the option **Bulk change**

**Notes**

Within this window, the selected change is applied only to items that are checked (in the far left column of each item)

- You can check and uncheck items individually, or use the **Select all** and **Deselect all** buttons.

- You can make as many different types of changes as you like within this window.

Changes are stored in memory, and are not saved until you click the OK button.

**Making a change**

The process of making a bulk change is very simple, just follow these steps.

- In the **Data type to change** drop down menu, choose what you want to change

- The options for what you may change depend on the selection made. Enter the information for your change (e.g. new value, selection, etc)

- Ensure that the correct keys are selected, selecting or unselecting them as necessary.

- Click the **Apply change** button.

Repeat these 4 steps as many times as you want.

- Click **OK** to save

## 8.11.7 Sorting keys

Key sorting is about getting the keys in your system to appear in the order that you want them. Everyone has different ideas about the order keys should appear – some people like all the master keys first while others like the change keys after each master.

When you create a system, ProMaster Key Manager stores the keys in the order you added them. If you later add another key, ProMaster Key Manager adds it at the end of the list.

> **Door** and **Key** sorting is available only for systems that you have entered. On systems maintained by your locksmith, your locksmith is responsible for the sorting.

### Getting started

- See the topic to learn how to access keys

- Click on the link **More tasks** then choose the option **Sort**

### Sorting

The process of sorting keys involves selecting the keys to sort then applying a sorting operation to those selected keys. The process may be repeated as many times as necessary.

Selection and sorting operations are accessible through the button bar at the top of the window, through a popup context menu (right click mouse) and through various hot-key combinations.

### Selecting keys for sorting

There are various ways to select keys. The help refers to key presses wherever possible, although you may choose to use the buttons or popup menu.

| Task | Procedure |
|---|---|
| Select all keys | Press **Ctrl+A** |
| De-select all keys | Press **Ctrl+N** |
| Select to the end | Click on a key to highlight it.<br>Right click your mouse and choose **Select to bottom**. |
| Select a range of keys | Click on the first key then drag to the last key.<br>or<br>Click on the first key, hold down the Shift key, click on the last key. |
| Select scattered keys | Click on the first key.<br>While holding down the Ctrl key, click on the other keys. |

### Sorting keys

The sorting operations are applied to the selected keys.

The sorting operations available are:

| Sort operation | Procedure |
|---|---|
| Move up | Press **Ctrl+Up**<br>Moves all the selected keys up one position. |
| Move down | Press **Ctrl+Down**<br>Moves all the selected keys down one position. |
| Move up half page | Press **Ctrl+PgUp**<br>Moves all the selected keys up half the height of the window. |
| Move down half page | Press **Ctrl+PgDn**<br>Moves all the selected keys down half the height of the window. |
| Bring together | Press **Ctrl+B** |

| | Brings all the selected keys together, positioning them under the topmost selected key. |
|---|---|
| Alpha sort | Press **Ctrl+S** Sorts the selected keys by treating the key number as pure text. I.e. A dictionary sort is performed. |
| Numeric sort | Press **Ctrl+M** Sorts the selected keys in logical numerical order. All selected keys must have a numerical component in the key number. Each key number is broken into multiple numerical components and these are compared for sorting purposes. A numeric sort will correctly produce the sequence 1.1, 1.2, ..., 1.9. 1.10, 1.11, 2.1, 2.2, ..., 2.9, 2.10 |
| USA sort | Press **Ctrl+U** Sorts the key according to the USA key naming convention. |

Select groups of keys and then sort them as you want.

- Click **OK** to save

## 8.11.8 Exporting keys to a CSV file

Keys may be exported to a text file in CSV format.  A simple wizard is used to gather your choices for the export.

This export produces a list of keys.

**Getting started**

- See the topic <u>Searching for keys</u><sup>☐44</sup> to learn how to access keys

- Click on the link **More tasks** then choose the option **Export to CSV file**

**Exporting data**

- Choose a file name for the export.

- Choose if column headings are required.

- Choose options for what to do after the export.

- Click **Finish** to make the export.

## 8.11.9 Key hierarchy

Many key systems, particularly large systems have a hierarchy of keys.  While the key hierarchy is not an absolute representation of the doors operated by each key, it does give a high level representation of the structure of the key system.

**Getting started**

- You must be logged in

- From the **System** menu, select **Key hierarchy**

You must choose a system.  The key hierarchy for the system is shown.

**Using key hierarchy**

You may expand or collapse and branches in the hierarchy by clicking in the **[+]** and **[-]** buttons.

Click the **Print** button to print the key hierarchy.  See <u>Reporting on key hierarchy</u><sup>☐89</sup>.

# 8.12 Working with doors

## 8.12.1 Searching for doors

**Getting started**

- You must be logged in

- From the **System** menu, select Doors

**Using doors**

Search for doors in the same manner that other ProMaster Key Manager searches are performed.

On small systems, it is practical to find all doors then scroll down the list to the door you require.

Not so when you are working with hundreds or even thousands of doors, as this way of operating becomes terribly inefficient as it is very time inefficient to peruse a long list to isolate a particular door.

ProMaster Key Manager offers a broad range of search criteria from which you may enter as little or as much information as you require, then click the **Find** button to show doors that match your criteria.

Use the **Add**, **Remove** and **Properties** buttons to enter and alter doors.  See Entering doors☐50

Right click on a door for more functionality.

Here's a few features worth noting:

| Menu choice | Description |
|---|---|
| Service | Allows you to see and record door servicing information.  See Door service☐53 |
| Keys | Shows which keys operate the door.  See Door keying☐51.  To change keying, see Keying matrix☐54 |
| Keying matrix | Allows you to see and alter the keys that operates each door in a matrix form.  See Keying matrix☐54 |
| Bulk change | Allows many doors to be changes in a single operation.  See Bulk change doors☐51 |
| Sort | Allows doors to be sorted into a different order.  See Sorting doors☐52 |

For locksmith maintained systems, almost all information is read-only, and you may not add new doors.

## 8.12.2 Entering doors

See the topic Searching for doors☐50 to learn how to add doors.

Each door, has a unique door number.

**Explanation of data fields**

| Data field | Description |
|---|---|
| Door number | The number that uniquely identifies this door within the master key system. Each door has a unique door number. |
| Stamping | The stamping is information that may be marked onto the cylinder during manufacturing. Sometimes this is the same as the door number, other times it is the lowest level key that operates the cylinder - it depends on who manufactured the system.  Stamping will be present locksmith maintained systems but generally you would leave this blank for your own systems. |

| Description | A description of the door to give it meaning beyond that attributed to the door number. |
|---|---|
| Area | The area is used to represent the physical location of the door. In a multi building project, the area should contain a reference to the building and to the level. You may type in a new area, or pick one used on another door within the system from the drop down list. |
| Construction keyed | Typically not used on user entered systems, but on locksmith maintained systems it indicates the cylinder has been assembled with construction keying components for the construction phase of a building. |
| Notes | May be altered for locksmith maintained systems as well as your own systems.  General notes about the door. |
| Hardware | May be altered for locksmith maintained systems as well as your own systems.  Allows for the recording of information about hardware on the door. |
|  |  |

**Adding multiple doors**

When you are adding doors, click **Save and add another**.  ProMaster Key Manager will save your door, leaving the window open for another door to be added, and some fields will retain the values you entered while others are progressed automatically.  When adding a whole bunch of contiguously numbered doors, this is extremely useful.

## 8.12.3      Door keying

See the topic Searching for doors☐50 to learn how to see door keying.

The door keying window is available from various places in ProMaster Key Manager.

Door keying shows the keys that will operate the door.

For each key you may see the key issues (See Key issues☐46) and doors that the key operates (See Key access☐47)

You may print a doors report for the door by clicking the **Print doors and keys** button.  See Reporting on doors☐80

## 8.12.4      Bulk change doors

Bulk changing is the process whereby you may apply the same change to a few or even many doors in a single operation. It is useful for changing a number of doors when you have entered them without this information or to rapidly fix data errors.

**Getting started**

- See the topic Searching for doors☐50 to learn how to access doors

- Search for the doors you want to include in the bulk change operation

- Click on the link **More tasks** then choose the option **Bulk change**

**Notes**

Within this window, the selected change is applied only to items that are checked (in the far left column of each item)

- You can check and uncheck items individually, or use the **Select all** and **Deselect all** buttons.

- You can make as many different types of changes as you like within this window.

Changes are stored in memory, and are not saved until you click the OK button.

### Making a change

The process of making a bulk change is very simple, just follow these steps.

- In the **Data type to change** drop down menu, choose what you want to change

- The options for what you may change depend on the selection made. Enter the information for your change (e.g. new value, selection, etc)

- Ensure that the correct doors are selected, selecting or unselecting them as necessary.

- Click the **Apply change** button.

Repeat these 4 steps as many times as you want.

- Click **OK** to save

## 8.12.5 Sorting doors

Door sorting is about getting the doors in your system to appear in the order that you want them.

When you create a system, ProMaster Key Manager stores the doors in the order you added them. If you later add another door, ProMaster Key Manager adds it at the end of the list.

> **Door** and **Key** sorting is available only for systems that you have entered. On systems maintained by your locksmith, your locksmith is responsible for the sorting.

### Getting started

- See the topic Searching for doors☐50 to learn how to access doors

- Click on the link **More tasks** then choose the option **Sort**

### Sorting

The process of sorting doors involves selecting the doors to sort then applying a sorting operation to those selected doors. The process may be repeated as many times as necessary.

Selection and sorting operations are accessible through the button bar at the top of the window, through a popup context menu (right click mouse) and through various hot-key combinations.

### Selecting doors for sorting

There are various ways to select doors. The help refers to key presses wherever possible, although you may choose to use the buttons or popup menu.

| Task | Procedure |
|---|---|
| Select all doors | Press **Ctrl+A** |
| De-select all doors | Press **Ctrl+N** |
| Select to the end | Click on a door to highlight it.<br>Right click your mouse and choose **Select to bottom**. |
| Select a range of doors | Click on the first door then drag to the last door.<br>or<br>Click on the first door, hold down the Shift key, click on the last door. |
| Select scattered doors | Click on the first door.<br>While holding down the Ctrl key, click on the other doors. |

### Sorting doors

The sorting operations are applied to the selected doors.

The sorting operations available are:

| Sort operation | Procedure |
|---|---|
| Move up | Press **Ctrl+Up**<br>Moves all the selected doors up one position. |
| Move down | Press **Ctrl+Down**<br>Moves all the selected doors down one position. |
| Move up half page | Press **Ctrl+PgUp**<br>Moves all the selected doors up half the height of the window. |
| Move down half page | Press **Ctrl+PgDn**<br>Moves all the selected doors down half the height of the window. |
| Bring together | Press **Ctrl+B**<br>Brings all the selected doors together, positioning them under the topmost selected door. |
| Alpha sort | Press **Ctrl+S**<br>Sorts the selected doors by treating the door number as pure text. I.e. A dictionary sort is performed. |
| Numeric sort | Press **Ctrl+M**<br>Sorts the selected doors in logical numerical order. All selected doors must have a numerical component in the door number. Each door number is broken into multiple numerical components and these are compared for sorting purposes. A numeric sort will correctly produce the sequence 1.1, 1.2, ..., 1.9. 1.10, 1.11, 2.1, 2.2, ..., 2.9, 2.10 |

Select groups of doors and then sort them as you want.

- Click **OK** to save

## 8.12.6 Door service

Door servicing may be recorded in ProMaster Key Manager.

**Getting started**

- See the topic Searching for doors⌐50 to learn how to access doors
- Right click on the door and choose option **Service**

All previous services for the door are displayed

**Making a change**

- Use the **Add**, **Remove** and **Properties** buttons to add and alter door service information.

Each service must have a time and description.

The description may be selected from the drop down list of previous service descriptions.

You may record notes about the service.

- Click **OK** to save

## 8.12.7 Exporting doors to a CSV file

Doors may be exported to a text file in CSV format.  A simple wizard is used to gather your choices for the export.

This export produces a list of doors.

**Getting started**

- See the topic Searching for doors$^{\Box 50}$ to learn how to access doors

- Click on the link **More tasks** then choose the option **Export to CSV file**

**Exporting data**

- Choose a file name for the export.

- Choose if column headings are required.

- Choose options for what to do after the export.

- Click **Finish** to make the export.

## 8.12.8   Finding doors

Sometimes, and especially on large sites with many systems, someone wants access to a door, they don't know exactly what the door is called, and have no desire to know what system it is on.  We need to find the door from just a little information, across all the systems.

**Getting started**

- You must be logged in

- From the **System** menu, select **Find door**

**Using find door**

- Fill in one or more of the search boxes with the information you know.

- Click **Find** to perform the search.

> The search on each piece of data is a **contains** type of search, so a system number **5AB151** will be considered a match to **B15**.  This way of searching allows you to find a door across systems using scraps of information.

**Other functionality**

You may see door information, record a door service and see the keys that operate the door.

Right click on the door for a menu with more functionality.

## 8.13   Working with keying

### 8.13.1   Keying matrix

The keying matrix shows you all keys and doors in a system, indicating which keys fit each door.  For locksmith systems changes are not allowed, but on stand-alone systems you may use the keying matrix to define which keys fit each door.

**Getting started**

- You must be logged in

- From the **System** menu, select **Keying matrix**

- Select which system you want to work with

**Using the keying matrix**

Click the options button to change:

- The orientation of keys and doors

- What is shown for keys

- What is shown for doors

- What is highlighted (e.g. Highlight unassigned keys and doors)

Find door and Find key may be used to locate doors and keys.

Right click on the keying matrix for more functions and to see keyboard shortcuts.

### Making a change

Click on the intersection of a key and door to turn on or off check mark at that position. Alternatively you may navigate the matrix with your keyboard and use the space key to make the change.

- Click **OK** to save

## 8.13.2 Exporting keying to a CSV file

Keying may be exported to a text file in CSV format. A simple wizard is used to gather your choices for the export.

This export produces a list of each key - door relationship. See also the html export Export keying to HTML⊓[95]

### Getting started

- See the topic Keying matrix⊓[54] to learn how to access the keying matrix

- Right click on the keying matrix and choose **Export to CSV file**

### Exporting data

- Choose a file name for the export.

- Choose if column headings are required.

- Choose options for what to do after the export.

- Click **Finish** to make the export.

## 8.14 Working with orders

## 8.14.1 Searching for orders

### Getting started

- You must be logged in

- From the **System** menu, select **Orders**

### Using orders

Search for orders in the same manner that other ProMaster Key Manager searches are performed.

Use the **Add**, **Remove** and **Properties** buttons to enter and alter orders. See Entering orders⊓[56]

> ProMaster Key Manager requires you to order your keys, which will update your key quantities. The process of ordering keys is how the key issues are created. It is the **key issues**, not the keys, which are given to key holders.

## 8.14.2　Entering orders

See [Searching for orders]▯55 to see how to access orders.

The order screen is divided into 4 tabs.

### Entering the order

#### Order tab

Enter your order number and confirm that the delivery details are correct.  The **Copy another address** link is provided to give you quick to the company address and system address.

When entering orders for a locksmith controlled system, the **Required by** and **Single delivery of this order is required** fields are important.

You will see the **Order status** shows **Entering**.  This will change once the order is released.

#### Signatories tab

Place a check mark against each signatory who will authorise the order.  The type of signatory security used by the system is show at the bottom of the window.

ProMaster Key Manager will validate that the signatories selected are appropriate for the order being placed.

Right click on a signatory to see which keys they may authorise (For systems restricted by signatory).  See [Key signatory authorities]▯58

#### Notes tab

On this tab you may enter any notes that you want your locksmith to see.  For orders on non locksmith maintained systems, notes does not serve much purpose.

#### Keys tab

The keys tab is where you enter your key order quantities.

Against each key you can enter the **Order** quantity required and optionally a Note for that line item on the order.

Right click on a key for a menu of more functionality.

| Menu choice | Description |
|---|---|
| Details | Shows information about the selected key. |
| Door access | Shows the doors that the key operates.  See [Door keying]▯51 |
| Apply filter | Filters the list of keys based on various filter conditions.  See [Filtering which keys you can see]▯57 |
| Remove filter | Removes the filter, thereby showing all keys. |
| Find | Search for a key by key number |
| Copy quantity to next key | Copies the quantity from the current key to the next key.  Learn and use the keyboard shortcut F12! |
| Copy quantity and notes to next key | Copies the quantity and notes from the current key to the next key.  Learn and use the keyboard shortcut Shift+F12! |
| Paste keys from clipboard | [Allows]▯91 you to copy a list of key numbers to the clipboard (e.g. from an email message), then shows you what will be ordered.  See [Paste keys into an order]▯58 |
| Print list of keys | Prints a list of the keys on the order.  Useful for checking your order before it is released.  See [Reporting on keys on an order]▯91 |

### Finishing the order

If you want to save your work on this order and return to it later, simply click the **OK** button.

To save the order and release it, click the **Release order** button.  The order status is changed to **Released** and the order may not be altered.

When you release an order, ProMaster Key Manager verifies that sufficient signatories have been selected to authorise all keys.  You will be notified of any problems and the order will not be released.

After releasing the order, the **Send order** button allows you to print the order (See Producing a key order report☐91), save an order file for your locksmith (See Save order for locksmith☐58 ) or send it to your locksmith by email.

#### Authorising an order

If you have configured ProMaster Key Manager for electronic signatory authorisation (see Signatory authentication☐29) then each signatory must authorise the order before it can be saved or emailed to your locksmith.

To authorise each signatory, right click on the signatory and select **Authorise**.  See Signatory authorisation☐58

## 8.14.3 Filtering which keys you can see

See the topic Entering orders☐56 to learn how to filter the list of keys.

- Use the filter conditions to assist readability by reducing the number of keys displayed.

- Click **OK** to apply the filter.

## 8.14.4 Receiving keys on your order

#### Getting started

When a key order is delivered, reopen the order and click the **Receive** button.

#### Locksmith maintained systems

Unlike orders for standalone systems, you have only one option and that is confirm that the order is received.  The key order is marked as **complete**.

Flagging the order as received indicates that the order is not outstanding, but does not make the key issues available.  The key issues are made available by importing a data update from your locksmith.

Your locksmith should provide you with a new data file to import into ProMaster Key Manager to update your key issues and synchronise your data with your locksmith's data.

#### Standalone systems

- Choose if you receiving all keys or only some of the keys that were ordered.

- If you are receiving only some keys, select the keys that have been received.

- Click **OK.**  The keys will be marked as received and the corresponding key issues will be created so that you may issue them to your key holders.

The key order is marked as **complete** when all keys have been received.

### 8.14.5     Paste keys into an order

See the topic Entering orders 56 to learn how to paste keys into an order.

- Each line of text on the clipboard is displayed.

- Lines containing a key number are indicated as correct and lines that do not contain a key number are shown as an error.

- Enter the quantity you want to order of each key and click **OK**

Any keys already on the order are not altered.

### 8.14.6     Signatory authorisation

If you have configured ProMaster Key Manager for electronic signatory authorisation (see Signatory authentication 29 ) then each signatory must authorise the order before it can be saved or emailed to your locksmith.

- To authorise each signatory, right click on the signatory and select **Authorise**

- The signatory must enter his or her password then click **OK**.

Repeat this process for each signatory on the order.

### 8.14.7     Key signatory authorities

For systems restricted by signatory, you may right click on a signatory in an order to see which keys the signatory may authorise.

### 8.14.8     Save order for locksmith

Normally it is desirable to email an order directly to your locksmith.  Some institutions restrict email access.

In this scenario, you may save the order file to a network location or memory stick and then use another computer to send the order file to your locksmith.

## 8.15     Working with key issues

### 8.15.1     Find issued keys by packet

Some institutions send issued keys in packets (identified by a label) to a central point for collection by the key holders.  When keys are issued there is an option to record a packet number and print a packet label.

If you later have such a packet and want to identify who it is for, the Find issued keys by packet feature will provide that information.

**Getting started**

- You must be logged in

- From the **Issues** menu, select **Find key issues by packet**

**Finding by packet**

- Enter the packed number and click **Find**

- Right click on the keys or key bunches to see more functionality.

### 8.15.2 Selecting a key issue

Search for key issues in the same manner that other ProMaster Key Manager searches are performed.

When the key issues are displayed, you may select more than one by placing a check mark on the key issues you want.

Right click on the list for more functionality.

Click **OK** to return with your selection of key issues.

### 8.15.3 Key issue holding

Key issue holding may be accessed from other places in ProMaster Key Manager.

Key issue holding shows you information about the key holder to whom the key issue is issued.

The information shown will always show who has the key issue, when it was issued, etc.

For the Premium edition, additional information may be shown about how the key holder signed for the key (e.g. Password, Signed on signature pad, Signed key issue confirmation and scanned back into ProMaster Key Manager)

## 8.16 Working with key bunches

### 8.16.1 Searching for key bunches

Some organisations have bunches of keys on key-rings that they issue to contractors, security staff etc. ProMaster Key Manager supports this by providing **Key Bunch** functionality. Once a key bunch is defined, it may be issued to and returned from key holders as a single unit.

**Getting started**

- You must be logged in
- From the **Issues** menu, select **Key bunches**

**Using key bunches**

Search for key bunches in the same manner that other ProMaster Key Manager searches are performed.

Use the **Add**, **Remove** and **Properties** buttons to enter and alter key bunches. See Entering key bunches 60

Right click on a key bunch for more functionality.

Here's a few features worth noting (most are self explanatory so are not mentioned here):

| Menu choice | Description |
|---|---|
| Door access | Shows the doors accessed by the key bunch. See Key bunch access 60 |
| Holding | If the bunch is on issue, shows information about the key bunch holding. See Key bunch holding 60 |
| Bunch history | Shows when keys were added to or removed from the key bunch. See Key bunch history 60 |
| Print key bunch | Prints a report of the keys in the bunch. See Reporting on key bunches 89 |
| Bunch has been lost | Takes you to Lost and broken keys 61 to record the key bunch as lost. |

| Replace broken key | Takes you to [Lost and broken keys](#)▯61 to replace a broken key in the key bunch. |

### 8.16.2    Entering key bunches

See the topic [Searching for key bunches](#)▯59 to learn how to add key bunches.

Adding key bunches is a simple process, but here's a few pointers about how it works:

- Each key bunch must have a unique name.  Try to use a descriptive name for each bunch.

- A key bunch may not be edited unless it is on-hook.

- Only keys that are on hook may be added to a bunch.

- A key bunch can contain keys from any number of systems – you are not restricted to keys from just one system.

- When selecting a key for the bunch, you need to select not only the system and key numbers, **but also the issue number**.  Be sure that the issue numbers you add to the bunch are those you select from your key cabinet when assembling the bunch.

- As you add keys to a key bunch or remove them, you alterations are indicated with + and - graphics, so you know what changes will be applied when you save the key bunch.

> Normally ProMaster Key Manager will stop you adding two of the same key to a key bunch.  For users where this is necessary (E.g. making a virtual bunch with many issues of the same key for cleaners), this restriction can be removed by altering the [Application parameter](#)▯24 "Allow bunches to contain multiple issues of the same key"

### 8.16.3    Key bunch access

See the topic [Searching for key bunches](#)▯59 to learn how to see key bunch access.  Key bunch access may be accessed from other places in ProMaster Key Manager also.

Key bunch access shows you which doors the bunch operates by taking into consideration all keys in the key bunch.

### 8.16.4    Key bunch history

See the topic [Searching for key bunches](#)▯59 to learn how to see Key bunch history.

Key bunch history shows when keys are added and removed from the key bunch.

If you have upgraded from a previous version of ProMaster Key Manager, the key bunch history will be incomplete as previous versions did not record key bunch changes.

### 8.16.5    Key bunch holding

See the topic [Searching for key bunches](#)▯59 to learn how to see Key bunch holding.  Key bunch holding may be accessed from other places in ProMaster Key Manager also.

Key bunch holding shows you information about the key holder to whom the key bunch is issued.

The information shown will always show who has the key bunch, when it was issued, etc.

For the Premium edition, additional information may be shown about how the key holder signed for the key (e.g. Password, Signed on signature pad, Signed key issue confirmation and scanned back into ProMaster Key Manager)

# 8.17 Working with lost and broken keys

## 8.17.1 Lost and broken keys

**Lost and broken keys** may be accessed from various places in the program, or from the main menu.

**Lost and broken keys** is a simple wizard that collects information before recording your changes.  When accessed from the main menu, all options are available (and that's what will be described here), but when accessed from a key holder, from a key or from a key bunch then because some of the information including the operation is already known it will be filled in for you and fewer choices will be required to complete the process.

### Getting started

- You must be logged in

- From the **Issues** menu, select **Lost and broken keys**

### Using lost and broken keys

The first step is to choose the operation - ProMaster Key Manager needs to know if you have lost a key, lost a key bunch, broken a key, or broken a key in a bunch that you want to replace.

#### A key has been lost

- You must select the key(s) that have been lost.  This is done by using the **Select keys** and **Select keys by key holder** links.  You may select multiple keys to be lost in a single operation.

- You will be asked verify the actions that are to happen before you may complete the operation.

#### A key has been broken

- You must select the key(s) that have been broken.  This is done by using the **Select keys** and **Select keys by key holder** links.  You may select multiple keys to be broken in a single operation.

- You will be asked verify the actions that are to happen before you may complete the operation.

#### A key bunch has been lost

- You must select the key bunch that has been lost.  This is done by using the **Select key bunch** and **Select key bunch by key holder** links.  Only one bunch may be lost at a time.

- You will be asked verify the actions that are to happen before you may complete the operation.

#### A key in a key bunch has been broken

- You must select the key bunch that has the broken key.  This is done by using the **Select key bunch** and **Select key bunch by key holder** links.

- The key bunch is shown.  Highlight the key that is broken and click **Next** to proceed.

- A list of key issues will be shown for the same key.  Highlight the key that you will be introducing to the key bunch.

- You will be asked verify the actions that are to happen before you may complete the operation.

> When you replace a broken key in a key bunch that is on issue, the broken key is returned and the new key is issued.  Be sure to physically add the replacement key to the key bunch.

**Fees**

Premium edition only.

If the key holder has paid a deposit on a key and the key is lost or broken, then the deposit is retained. Otherwise, the key holder's key holder category determines the amount of the lost key fee or broken key fee and if that fee amount may be altered Etc.

The fee amount is calculated per key and a total amount is shown. The operator must receive the key from the key holder before continuing.

## 8.17.2     Found lost keys

Keys or key bunches that have previously been marked as lost may be found again.

**Found lost keys** is a simple wizard that collects information before recording your changes.

**Getting started**

- You must be logged in

- From the **Issues** menu, select **Found lost keys**

**Using found lost keys**

The first step is to choose the operation - ProMaster Key Manager needs to know if you have found a key or found a key bunch.

**A key has been found**

- You must select the key(s) that have been found  This is done by using the **Select keys** links  You may select multiple keys to be lost in a single operation.

- You will be asked verify the actions that are to happen before you may complete the operation.

**A key bunch has been found**

- You must select the key bunch that has been found.  This is done by using the **Select key bunch** link. Only one bunch may be found at a time.

- You will be asked verify the actions that are to happen before you may complete the operation.

# 8.18     Working with key cabinets

## 8.18.1     Creating Key cabinets

Premium edition only.

You may define multiple key cabinets to model your use of multiple physical key cabinets.  If you don't define any key cabinets, the concept of a single global key cabinet is used.

Once key cabinets are defined, the application behaviour is changed in several areas.  Firstly, each user must be given access to a key cabinet in order that they can issue keys from that cabinet (this is done as part of the User setup 23).  Secondly, each key issue not only has a hook, defining its place within the cabinet, but also a cabinet.

From the key cabinets window there is functionality to bulk move key issues into cabinets.  See Moving keys into a key cabinet 63

Defining key cabinets then assigning them to users allows you to restrict the issues that each user can issue. The return of keys is not restricted by the key cabinet configuration.

**Getting started**

- You must be logged in

- From the **Setup and Admin** menu, select **Key cabinets**

***Making a change***

- Use the **Add**, **Remove** and **Properties** buttons to set up your cabinets.

Each key cabinet name may appear only once.

Click on the **More tasks** link then <u>Move keys into key cabinet</u>⬚63 to manipulate the key cabinet for key issues rapidly.

## 8.18.2 Moving keys into a key cabinet

This wizard allows you to select key issues based on selection criteria and move them into a key cabinet.

See the topic <u>Creating Key cabinets</u>⬚62 to learn how to access this wizard.

***Making a change***

**Source cabinet**

- Choose the option for how key issues will be selected.

- Click **Next**

**Systems**

- All systems that have key issues meeting your source cabinet selection are shown.  Deselect any systems you do not want to alter.

- Click **Next**

**Selected keys**

- All key issues that will be moved are shown, each indicating the current cabinet.

- You may select or deselect any key issues.  Only selected key issues will be moved.

- Click **Next**

**Destination cabinet**

- Choose the key cabinet to move the key issues into

- Click **Finish**

## 8.18.3 Using key cabinets

ProMaster Key Manager key cabinets are a representation of your physical key cabinet.  The Basic edition allows for only one key cabinet.  On the Premium edition you may define multiple key cabinets and apply user security to them.

The **key cabinet** window is where you may see the key issues that are currently on hook (I.e. not issued, not lost, not broken).

**Getting started**

- You must be logged in

- From the **Issues** menu, select **Key cabinet**

**Using the key cabinet**

Search for key cabinets in the same manner that other ProMaster Key Manager searches are performed.

- Right click on a key issue or click the **More tasks** link to access more functionality.

Here's a few features worth noting:

| Menu choice | Description |
|---|---|
| Issue | Issues the key or key bunch to a key holder. See <u>Issuing keys and key bunches</u>◻65 |
| Change hook | Allows you to change the hook or key cabinet for the key issue or key bunch. See <u>Changing the hook for a key</u>◻64 and <u>Changing the hook for a key bunch</u>◻64 |
| Order history | Shows the key order history for the selected key. See <u>Key order history</u>◻47 |
| Print key cabinet | Prints the key cabinet contents. See <u>Reporting on key cabinets</u>◻82 |

## 8.18.4    Changing the hook for a key

Each key issue may be assigned a hook (and key cabinet for the Premium edition with key cabinets defined)

See the topic <u>Using key cabinets</u>◻63 to learn how to access the key hook window.

**Making a change**

Links are available to show the key details and also all issues of the key.

- Select the **issue range** that you want to change. Choose between Only this key issue, All issues of this key in the same key cabinet and All issues of this key in any key cabinet.

- Choose the new key cabinet (Premium edition)

- Enter the hook name

- Click **OK** to make the change

## 8.18.5    Changing the hook for a key bunch

Each key bunch may be assigned a hook (and key cabinet for the Premium edition with key cabinets defined)

See the topic <u>Using key cabinets</u>◻63 to learn how to access the bunch key hook window.

**Making a change**

A links is available to show the key bunch details.

- Choose the new key cabinet (Premium edition)

- Enter the hook name

- Click **OK** to make the change

# 8.19    Working with key holders

## 8.19.1    Issuing, returning and reissuing keys

There are 4 operations associated with issuing and returning keys and key bunches.

| Operation | Description |
|---|---|

| | |
|---|---|
| Issuing keys and key bunches □65 | Issue one or more keys and/or key bunches to a key holder. |
| Reissue keys and key bunches □66 | Reissue one or more keys and/or key bunches to a key holder.  Internally the keys are returned and then issued again (with a new return-by date), but the whole process is handled as a single operation. |
| Return keys and key bunches □68 | Return one or more keys and/or key bunches from a key holder. |
| Return keys and key bunches and issue to another key holder □69 | Return one or more keys and/or key bunches from a key holder and immediately issue them to another key holder. |

#### 8.19.1.1    Issuing keys and key bunches

This procedure is used to issue one or more keys or key bunches to a key holder.

The issue keys wizard may be accessed from the main menu or from several other places where some information (e.g. Key holder or a key issue or a key bunch) is pre-selected.

**Getting started**

- You must be logged in

- From the **Issues** menu, select **Issue keys and key bunches**

**Issuing keys**

**Key holder**

- Use the key holder search to select the key holder you are issuing keys to.

- Premium edition only: You may right click the key holder and select **Documents** to access or add key holder documents.  See also Key holder documents □77.

- Click **Next**.

**Keys and key bunches**

- Add one or more keys or key bunches to the list of keys to be issued.

- Keys may be selected by choosing the **system**, entering the **key** number and **issue** number then clicking **Add to list**, or click **Select** to use the Select key issue window (see Selecting a key issue) □59 .

- Key bunches may be selected by choosing the bunch from the drop down list then clicking **Add to list**, or click **Select** to search for a key bunch (see Searching for key bunches) □59

- %PRODUCTVERSIONPREMIUM%> edition only: If you have used the pre-issue process to allocate key issues to a key holder and notify the key holder by email, then the pre-issued key group will be available for selection.  When using pre-issued keys, you may not mix them with ad hoc keys and bunches, and all keys in the pre-issued group must issued in a single operation.

- When all keys and key bunches being issued are added to the list, click **Next**.

**Return time and reason**

- The **issue time** defaults to the current time.

- Enter a **reason** or select one the drop down list (See Issue and return reasons □28 to define reasons).  The reason is optional.

- Enter a **authorised by** or select one the drop down list (See Issue authorise names □29 to define names). The authorised by name is optional.

- The return date and time is calculated from the settings for the corresponding [key holder category]⬜26. You may enter a date and time, choose permanent issue or click the **Choose a pre-defined period** link for a menu of standard choices.

- Click **Next**.

**Options**

- Choose if you want to print a key issue confirmation report (See [Producing a key issue responsibility acceptance report]⬜90). If you choose this option you have the choice to include an area for signing and the choice of multiple copies.

- If you deliver keys in a packet, you may enter a packet number so keys may be located by packet later (See [Find issued keys by packet]⬜58). If you choose to print a packet label, options become available [Change packet printing options]⬜73 and also to make a packet name based off the date and time.

- Choose if you want to notify the key holder by email. If you choose the email option, you may choose to show see the email window before sending, you may alter the key holder's email address (and choose to make the change permanent) and also change the email message. The default email message is determined by the [key holder category]⬜26.

**Authentication**

- Choose how the key holder will accept the keys. This option is available only for the Premium edition.

| Authentication | Description |
| --- | --- |
| No authentication will be recorded | As is says! |
| The key holder will sign the key issue confirmation and it will be scanned and stored | A key issue responsibility acceptance report will be produced (even if you did not choose it in the options), then you will later be required to scan it back into ProMaster Key Manager when it contains your key holder's signature. See [Authenticating key issue by signed form]⬜71 |
| The key holder will enter their password | The user will enter their password. Facility are provided for changing password. See [Authenticating key issue by password]⬜72 |
| The key holder will sign on a signature pad | Your signature pad will be used to acquire the key holder's signature for this transaction. See [Authenticating key issue by signature pad]⬜72 |

**Deposit**

Premium edition only.

The key holder's key holder category is used to determine if a deposit should be retained, the default amount of the deposit and if the amount may be altered Etc.

If a deposit is to be taken, the operator must take the deposit from the key holder before completing the key issue process.

The deposit is refunded when the key is returned and forfeited if the key is lost or broken.

**Ready to finish**

- Check the summary of information and actions then click **Finish** to perform the task.

**8.19.1.2     Reissue keys and key bunches**

This procedure is used to reissue one or more keys or key bunches to a key holder or to several key holders in the same key holder category.

The issue keys wizard may be accessed from the main menu or from several other places where some information (e.g. Key holder or a key issue or a key bunch) is pre-selected.

One place from where you may frequently call the reissue process is from the key cabinet (See <u>Using key cabinets</u>□63).

**Getting started**

- You must be logged in

- From the **Issues** menu, select **Reissue keys and key bunches**

**Reissuing keys**

**Operation**

- Choose if you are reissuing keys for a **key holder**, or to several key holders in a **key holder category** (this may be used if you need to reissue many keys to contractors on a job that needs an extended time to complete)

- Click **Next**.

**Key holder**

- Use the key holder search to select the key holder you are issuing keys to.

- Premium edition only: You may right click the key holder and select **Documents** to access or add key holder documents.  See also <u>Key holder documents</u>□77.

- Click **Next**.

**Key holder category**

- Choose a key holder category.

- Click **Next**.

**Keys and key bunches**

- Add one or more keys or key bunches to the list of keys to be reissued.

- Keys may be selected by choosing the key from the drop down list then clicking **Add to list**, or click **Select** to use the Select key issue window (see <u>Selecting key issues by key holder</u>□72 or for key holder categories see <u>Selecting key issues by key holder category</u>□73).

- Key bunches may be selected by choosing the bunch from the drop down list then clicking **Add to list**, or click **Select** to search for a key bunch (see <u>Selecting key bunches by key holder</u>□73 or for key holder categories see <u>Selecting key bunches by key holder category</u>□73)

- When all keys and key bunches being reissued are added to the list, click **Next**.

**Return time and reason**

- Enter a reissue **reason** or select one the drop down list (See <u>Issue and return reasons</u>□28 to define reasons).  The reason is optional.

- Enter a **authorised by** or select one the drop down list (See <u>Issue authorise names</u>□29 to define names). The authorised by name is optional.

- The return date and time is calculated from the settings for the corresponding <u>key holder category</u>□26.  You may enter a date and time, choose permanent issue or click the **Choose a pre-defined period** link for a menu of standard choices.

- Click **Next**.

**Options**

- Choose if you want to print a key issue confirmation report (See <u>Producing a key issue responsibility acceptance report</u>[90]).  If you choose this option you have the choice to include an area for signing and the choice of multiple copies.

- Choose if you want to notify the key holders by email. If you choose the email option, you may choose to show see the email window before sending, you may alter the key holder's email address by clicking on the **Change email** link (and choose to make the change permanent) and also change the email message.  The default email message is determined by the <u>key holder category</u>[26].

**Ready to finish**

- Check the summary of information and actions then click **Finish** to perform the task.

**8.19.1.3    Return keys and key bunches**

This procedure is used to return one or more keys or key bunches from a key holder.

The issue keys wizard may be accessed from the main menu or from several other places where some information (e.g. Key holder or a key issue or a key bunch) is pre-selected.

**Getting started**

- You must be logged in

- From the **Issues** menu, select **Return keys and key bunches**

**Reissuing keys**

**Operation**

Choose how you will select keys and key bunches for return.

- Choose to **return keys by selecting key issues** when you have the keys in your hand, and particularly when they are from multiple key holders.

- Choose to **return keys on issue to a key holder** when you know the key holder who is returning the keys.  This will allow selection only of the keys and key bunches on issue to that key holder.

- Click **Next**.

**Key holder**

- Use the key holder search to select the key holder who is returning keys.

- Premium edition only: You may right click the key holder and select **Documents** to access or add key holder documents.  See also <u>Key holder documents</u>[77].

- Click **Next**.

**Keys and key bunches (when returning by key holder)**

- Add one or more keys or key bunches to the list of keys to be returned.

- Keys may be selected by choosing the key from the drop down list then clicking **Add to list**, or click **Select** to use the Select key issue window (see <u>Selecting key issues by key holder</u>[72]).

- Key bunches may be selected by choosing the bunch from the drop down list then clicking **Add to list**, or click **Select** to search for a key bunch (see <u>Selecting key bunches by key holder</u>[73])

- When all keys and key bunches being returned are added to the list, click **Next**.

**Keys and key bunches (when returning by selecting key issues)**

- Add one or more keys or key bunches to the list of keys to be issued.

- Keys may be selected by choosing the **system,** entering the **key** number and **issue** number then clicking **Add to list**, or click **Select** to use the Select key issue window (see Selecting a key issue)⌐59 .

- Key bunches may be selected by choosing the bunch from the drop down list then clicking **Add to list**, or click **Select** to search for a key bunch (see Searching for key bunches)⌐59

- When all keys and key bunches being returned are added to the list, click **Next**.

**Return time and reason**

- Enter the time the keys were returned.  The **return time** defaults to the current time

- Enter a return **reason** or select one the drop down list (See Issue and return reasons⌐28 to define reasons).  The reason is optional.

- Click **Next**.

**Options**

- Choose if you want to print a key return confirmation report (See Producing a key return confirmation report⌐91 ).  If you have the choice of multiple copies.

- Choose if you want to notify the key holders by email. If you choose the email option, you may choose to show see the email window before sending, you may alter the key holder's email address by clicking on the **Change email** link (and choose to make the change permanent) and also change the email message.  The default email message is determined by the key holder category⌐26.

**Ready to finish**

- Check the summary of information and actions then click **Finish** to perform the task.

**8.19.1.4      Return keys and key bunches and issue to another key holder**

This procedure is used to return one or more keys or key bunches from a key holder and immediately issue them to another.

This procedure is useful when one staff member leaves and another takes over the role and requires the same keys.

**Getting started**

- You must be logged in

- From the **Issues** menu, select **Return keys and key bunches and issue to another key holder**

**Returning keys and issuing to another key holder**

**Current key holder**

- Use the key holder search to select the key holder who is returning keys.

- Premium edition only: You may right click the key holder and select **Documents** to access or add key holder documents.  See also Key holder documents⌐77 .

- Click **Next**.

**Keys and key bunches**

- Add one or more keys or key bunches to the list of keys to be returned.

- Keys may be selected by choosing the key from the drop down list then clicking **Add to list**, or click **Select** to use the Select key issue window (see Selecting key issues by key holder⌐72).

- Key bunches may be selected by choosing the bunch from the drop down list then clicking **Add to list**, or click **Select** to search for a key bunch (see Selecting key bunches by key holder[73] )

- When all keys and key bunches being returned are added to the list, click **Next**.

**New key holder**

- Use the key holder search to select the key holder you are issuing keys to.

- Premium edition only: You may right click the key holder and select **Documents** to access or add key holder documents.  See also Key holder documents[77].

- Click **Next**.

**Time and reason**

- Enter the time the keys were returned.  The **return time** defaults to the current time

- Enter a return **reason** or select one the drop down list (See Issue and return reasons[28] to define reasons).  The reason is optional.

- Enter a **authorised by** or select one the drop down list (See Issue authorise names[29] to define names). The authorised by name is optional.

- The **issue time** defaults to the current time.

- Enter a **reason** or select one the drop down list (See Issue and return reasons[28] to define reasons).  The reason is optional.

- The return date and time is calculated from the settings for the corresponding key holder category[26].  You may enter a date and time, choose permanent issue or click the **Choose a pre-defined period** link for a menu of standard choices.

- Click **Next**.

**Options - current key holder**

- Choose if you want to print a key return confirmation report (See Producing a key return confirmation report[91] ).  If you have the choice of multiple copies.

- Choose if you want to notify the key holder by email. If you choose the email option, you may choose to show see the email window before sending, you may alter the key holder's email address (and choose to make the change permanent) and also change the email message.  The default email message is determined by the key holder category[26].

**Options - new key holder**

- Choose if you want to print a key issue confirmation report (See Producing a key issue responsibility acceptance report[90]).  If you choose this option you have the choice to include an area for signing and the choice of multiple copies.

- If you deliver keys in a packet, you may enter a packet number so keys may be located by packet later (See Find issued keys by packet[58]).  If you choose to print a packet label, options become available Change packet printing options[73] and also to make a packet name based off the date and time.

- Choose if you want to notify the key holder by email. If you choose the email option, you may choose to show see the email window before sending, you may alter the key holder's email address (and choose to make the change permanent) and also change the email message.  The default email message is determined by the key holder category[26].

**Authentication**

- Choose how the key holder will accept the keys.  This option is available on ly for the Premium edition.

| Authentication | Description |
| --- | --- |

| No authentication will be recorded | As is says! |
|---|---|
| The key holder will sign the key issue confirmation and it will be scanned and stored | A key issue responsibility acceptance report will be produced (even if you did not choose it in the options), then you will later be required to scan it back into ProMaster Key Manager when it contains your key holder's signature.  See Authenticating key issue by signed form<sup>⌐</sup>71 |
| The key holder will enter their password | The user will enter their password.  Facility are provided for changing password.  See Authenticating key issue by password<sup>⌐</sup>72 |
| The key holder will sign on a signature pad | Your signature pad will be used to acquire the key holder's signature for this transaction.  See Authenticating key issue by signature pad<sup>⌐</sup>72 |

**Deposit refund**

Premium edition only.

If any of the keys have a deposit, regardless of the key holder's current category settings, the deposit refund is calculated.

The key holder's key holder category is used to if the refund amount per key may be altered Etc.

If a refund is to be given, the operator must refund the amount to the key holder after completing the key return process.

The amount of refund per key is editable only of the key holder category allows and only if the keys being returned all have the same deposit amount.

Keys from multiple key holders may not be returned in a single operation when deposits are involved.

**Ready to finish**

- Check the summary of information and actions then click **Finish** to perform the task.

**8.19.1.5      Authenticating key issue by signed form**

Premium edition only.

See the topic Issuing keys and key bunches<sup>⌐</sup>65 to learn how to use this form of key issue authentication.

After you finish issuing keys and key bunches, a key issue responsibility acceptance report will be printed (Even if you did not choose to print it in the key issue options).

> Get your key holder to sign the form in the space provided.

The **Store signed key issue responsibility acceptance window** is shown.

**Storing the document**

**Document source**

- Choose if ProMaster Key Manager is to capture the scanned document directly from your scanner or if you have already scanned the document in which case ProMaster Key Manager will load the file you have already produced.

**Capture from scanner**

- Select which scanner to use

- Your scanner software interface will appear.  You may need to consult your scanner software documentation for help using your scanner software.

- The image is displayed and you may modify it in the image editor by clicking the **Edit** button.  See Image Editor□ 108

- Click **Finish** to store the scanned document.

**Load from file**

- Select the file to load.  If you load a PDF file, no further action are available.  If you load a graphic (e.g. PNG, JPG), the image is displayed and you may modify it in the image editor by clicking the **Edit** button.  See Image Editor□ 108

- Click **Finish** to store the scanned document.

**8.19.1.6       Authenticating key issue by password**

Premium edition only.

See the topic Issuing keys and key bunches□ 65 to learn how to use this form of key issue authentication.

After you finish issuing keys and key bunches, the key issue text defined by the key holder's category is shown.  The key holder must enter their **password** and then click **OK**.

If the key holder has never set a password, the **Set password** window is shown, or you may change the password at any time by clicking the **Set a new password** link.  See Setting password for key issue authentication□ 72

**8.19.1.7       Setting password for key issue authentication**

To set a new password, the key holder must enter the new password twice, and the current ProMaster Key Manager user must enter their password to authenticate that the key holder setting the password is the correct person.

**8.19.1.8       Authenticating key issue by signature pad**

Premium edition only.

See the topic Issuing keys and key bunches□ 65 to learn how to use this form of key issue authentication.

After you finish issuing keys and key bunches, the key issue text defined by the key holder's category is shown.

Click the **Start** button to begin capturing a signature from the signature pad.

Click the **Clear** button if the key holder needs to try again.

Click **OK** when the signature is complete.

**8.19.1.9       Selecting key issues by key holder**

Search for key issues in the same manner that other ProMaster Key Manager searches are performed.

Key issues for only the **current key holder** are displayed.

When the key issues are displayed, you may select more than one by placing a check mark on the key issues you want.

Right click on the list for more functionality.

Click **OK** to return with your selection of key issues.

**8.19.1.10**     **Selecting key issues by key holder category**

Search for key issues in the same manner that other ProMaster Key Manager searches are performed.

Key issues for key holders in the **current key holder category** are displayed.

When the key issues are displayed, you may select more than one by placing a check mark on the key issues you want.

Right click on the list for more functionality.

Click **OK** to return with your selection of key issues.

**8.19.1.11**     **Selecting key bunches by key holder**

Search for key bunches in the same manner that other ProMaster Key Manager searches are performed.

Key bunches for only the **current key holder** are displayed.

When the key bunches are displayed, you may select more than one by placing a check mark on the key bunches you want.

Right click on the list for more functionality.

Click **OK** to return with your selection of key bunches.

**8.19.1.12**     **Selecting key bunches by key holder category**

Search for key bunches in the same manner that other ProMaster Key Manager searches are performed.

Key bunches for key holders in the **current key holder category** are displayed.

When the key bunches are displayed, you may select more than one by placing a check mark on the key bunches you want.

Right click on the list for more functionality.

Click **OK** to return with your selection of key bunches.

**8.19.1.13**     **Packet printing options**

Packet printing options are available if you choose to print a key issue packet (See <u>Issuing keys and key bunches</u>[65])

- Choose the label size you are using from the drop down list.

- Choose what to print on the label.

- Chick **OK** to save the choices.

**8.19.1.14**     **Pre-issue keys email**

Premium edition only.

This procedure is used to pre-issue one or more keys to a key holder and then notify the key holder by email.

The pre-issued keys will be available for selection when keys are issued.

**Getting started**

- You must be logged in

- From the **Issues** menu, select **Pre-issue keys email**

**Issuing keys**

**Key holder**

- Use the key holder search to select the key holder you are issuing keys to.

- Premium edition only: You may right click the key holder and select **Documents** to access or add key holder documents.  See also Key holder documents 77 .

- Click **Next**.

**Keys**

- Add one or more keys to the list of keys to be pre-issued.

- Keys may be selected by choosing the **system**, entering the **key** number and **issue** number then clicking **Add to list**, or click **Select** to use the Select key issue window (see Selecting a key issue) 59 .

- When all keys being pre-issued are added to the list, click **Next**.

**Options**

- Choose if you want to notify the key holder by email. If you choose the email option, you may choose to show see the email window before sending, you may alter the key holder's email address (and choose to make the change permanent) and also change the email message.  The default email message is determined by the key holder category 26 .

**Ready to finish**

- Check the summary of information and actions then click **Finish** to perform the task.


## 8.19.2    Searching for key holders

Key holders are the people who you issue keys to.  From the key holders search window you can add and alter key  holders, and also perform tasks like viewing the keys a key holder has (holdings) or printing reports of keys on issue.

**Getting started**

- You must be logged in

- From the **Issues** menu, select **Key holders**

**Using key holders**

Search for key holders in the same manner that other ProMaster Key Manager searches are performed.

Use the **Add**, **Remove** and **Properties** buttons to enter and alter key holders.  See Entering key holders 75

Right click on a key holder for more functionality.

Here's a few features worth noting:

| Menu choice | Description |
|---|---|
| Holdings | Shows you the keys on issue to the key holder, the doors the key holder may access and also keys previously issued to the key holder but now returned.  See Key holdings and door access 75 |
| Key issue report | Prints a key issue responsibility acceptance report.  See Producing a key issue responsibility acceptance report 90 |
| Key return report | Prints a key return confirmation reports.  See Producing a key return confirmation report 91 |

| Documents | Takes you to the Key holder documents[]77 to see documents stored against the key holder or add new documents.  This option is available only for the Premium edition. |
|---|---|
| Store scanned key issue responsibility acceptance form | Takes you to Store scanned key issue responsibility acceptance[]77 to select one or more keys and to scan the signed form that was produced when keys were issued and store it.  This option is available only for the Premium edition. |
| Lost and broken keys | Takes you to Lost and broken keys[]61 to record keys or the key bunch that are on issue to the key holder as lost or broken. |

## 8.19.3    Entering key holders

See the topic Searching for key holders[]74 to learn how to add key holders.

Adding key holders is a simple process, but here's a few pointers about how it works:

- Each key holder must have a **first name**, **last name** and **category**.  The category controls default issue durations and also the text that appears on reports and email messages.  See Key holder categories[]26

- **Area** allows you to classify key holders by arbitrary values.

- The more information you enter about a key holder, the easier it will be to contact the key holder in the future.

- The data fields are grouped together on several tabs.

- On the **notes** tab you record any amount of notes about the key holder.

- On the **photo** tab you may store a photo of the key holder.  Buttons are provided to open an image file, acquire from your scanner and paste an image from the clipboard.  The image editor is used when an image is loaded or if you later click the **Edit image** button.  See Image editor[]108 for more information.

**Adding multiple key holders**

When you add a key holder, you may click the **Save and add another** button to save your new key holder, then start adding another with many of the same values preserved from the previous key holder.  This is particularly useful when you are adding multiple staff.

Also, when you are adding a key holder, the **More tasks** link is available to access a menu.  The menu choice **Copy from another key holder** allows you to select another key holder from which many of the values are copied.

> A key holder may be made inactive by removing the check from the option **Key holder is active**.  A key holder with keys on issue may not be made inactive.  An inactive key holder may not be issued keys.

## 8.19.4    Key holdings and door access

**Key holdings and door access** shows the keys and key bunches currently on issue, the history or keys and key bunches that have previously been issued and returned and finally the doors that the key holder may access with the keys currently on issue.

See Searching for key holders[]74 to learn how to see **Key holdings and door access**.

- You may click on the titles of each of the lists to alter the display order.

- Right click on each of the lists to see a menu of more functionality, including the keyboard shortcuts (When you learn these, it's much faster than using your mouse)

## 8.19.5     Importing key holders from a CSV file

If you can get your key holders in a CSV file, a little manipulation of the file in Excel will allow you to import all your key holders in a single operation, removing the need to add them singularly.

This topic describes the process of importing a CSV key holder file.

Read the topic [Key holder import (CSV) file format](#)□ ¹⁰² for more information on the file contents allowed.

**Getting started**

- You must be logged in

- From the **File** menu, select **Import** then **Import key holders**

**Importing**

A simple wizard steps you through the import process.

**Select the file to import**

- Click **Select file** to select the file you are importing

- Click **Next**

**File contents and operation**

The wizard shows you the first three lines of the file so that you can see how it has been parsed. From this you may determine if the file content is what you were expecting or not.

It is common for the first line of a CSV file to contain column headings. The wizard tries to determine if that is the case with the file you selected, and sets the options accordingly. If the option for the first line is not correct, be sure to check or un-check it as necessary.

The **Operation** determines how the import is processed. Choose if you want new key holder, if you are updating existing key holders, or both.

Click **Next**

**Choose data columns**

The wizard looks at the column headings (if they are included in the file) and from these it attempts to determine what each column in the file is used for.

You may change the source column for each type of data. In each drop-down list, the column number, heading and first piece of data is shown.

Before proceeding you must correct any errors in the automatic column selection and also for each unassigned column make a selection for the source.

For all data types not contained in the import file the selection **Not available** must be made.

Click **Next**

**Data analysis**

A comprehensive data analysis is performed and any problems are reported.

If the analysis indicates that there are errors contained in the file, then you have the option to see the detail of those errors.

If there are errors, you must either fix the file and restart the import, of if you are happy to ignore the erroneous rows then then you can check the option to skip those rows.

Click **Next**

**Data remapping**

Each of the values found in the file for the field **Category** must be mapped to an existing **key holder category**. If the import values match, then the remapping will be completed automatically. Correct each import category value by selecting it, then selecting the correct key holder category from the **Use value** drop down list and clicking the **Set** button

Click **Next**

**Ready to finish**

A summary is displayed.

Click **Finish** to perform the import.

> If employee number is treated as the primary search field then employee number must be unique in the file (and it is used for locating existing key holders), otherwise the combination of First names, last name and company must be unique in the file (and they are used for locating existing key holders).

## 8.19.6     Store scanned key issue responsibility acceptance form

Premium edition only.

This procedure is used to store a signed key issue responsibility acceptance form that you may produce when keys are issued, but did not at that time choose to store (possibly the key holder was not present to sign it).

The store key issue responsibility acceptance form wizard is accessed from the key holders[74] window.

**Getting started**

- You must be logged in

- From the **Issues** menu, select **Key holders**

- Search for the key holder, then choose **Store scanned key issue responsibility acceptance form** after right clicking on the key holder.

**Authenticating keys**

**Keys and key bunches**

- Add one or more keys or key bunches to the list of keys.

- Keys may be selected by choosing the key from the drop down list then clicking **Add to list**, or click **Select** to use the Select key issue window (see Selecting key issues by key holder[72]).

- Key bunches may be selected by choosing the bunch from the drop down list then clicking **Add to list**, or click **Select** to search for a key bunch (see Selecting key bunches by key holder[73] )

- When all keys and key bunches to which the signed form for pertains are added to the list, click **Next**.

**Ready to finish**

- Check the summary of information and actions then click **Finish** to perform the task.

See Authenticating key issue by signed form[71] for information about the next step.

## 8.19.7     Key holder documents

Premium edition only.

You can store documents (e.g. letter of authorisation) against a key holder.

The key holder documents is accessed from the [key holders]^74 window, or when selecting a key holder when [Issuing keys and key bunches]^65 or [Return keys and key bunches]^68.

**Getting started**

- You must be logged in

- From the **Issues** menu, select **Key holders**

- Search for the key holder, then choose **Documents** after right clicking on the key holder.

# 8.20    Working with overdue issues

You should consider **Overdue issues** to be your to-do list. You should pursue the return of overdue issues, or reissue them if an extension is required.

**Getting started**

- You must be logged in

- From the **Issues** menu, select **Overdue issues**

**Using overdue issues**

The drop down list at the top of the window gives numerous choices to refine the range of overdue keys that are displayed.

On the list of overdue keys, you may click on the column headings to sort by each column.

Right click on a key for more functionality.

Here's a few features worth noting (most are self explanatory so are not mentioned here):

| Menu choice | Description |
| --- | --- |
| Door access | Shows the doors accessed by the [key]^47 or [key bunch]^60. |
| Email key holder | Generates an email to the key holder using the email template defined for the corresponding key holder category. |
| Reissue | Takes you to the Reissue keys window with the key holder already selected and the current key added to the list of keys to be reissues. You may reissue other overdue keys for the same key holder by selecting them for reissue. See [Reissue keys and key bunches]^66 |
| Print | Prints the overdue keys list. See [Reporting on overdue issues]^92 |

# 8.21    Reporting

## 8.21.1    Printer options

Every report allows you to access printer options by clicking on the **Printer options** link.

Printer options allow you to:

- Choose a different printer and paper tray for the report to be sent to.

- Print on both sides of the paper (if your printer supports duplexing)

- Print multiple copies

- Access the printer's advanced settings.

If you select the option to **Show advanced printer settings before you print**, the printer settings for your printer are displayed before the report is sent to the printer. This allows you to access printer specific

features such as printing multiple pages onto a single sheet of paper, selecting a different output bin or requesting the report be stapled.

## 8.21.2 Reporting on keys

### Getting started

- You must be logged in

- From the **Reports** menu, select **Keys**

### Range

The range specifies the set of data that will be included in the report. Here is an explanation of the range choices:

| Range | Description |
|---|---|
| Which keys do you want to include | **All keys**: All keys are printed.<br><br>**All keys in a system**: You must select a system. All keys in the system are printed.<br><br>**Keys issued to a key holder**: You must select a key holder. All keys issued to that key holder are printed.<br><br>**Keys issued to key holders in a category**: You must select a key holder category. All keys on issue to any key holders in that category are printed.<br><br>**A selection of keys**: You must select the keys to print by using the **Select keys** and **Remove key** links. |

### Options

Options modify the way the report appears, or the data included in the report. Here is an explanation of the option choices:

| Option | Description |
|---|---|
| Show door information | When selected, each key will be followed by the doors that it operates. |
| Key holder information | Choose if key holders are to be shown, and if yes then if key holder history (I.e. Returned keys) is to be shown also. |
| Include deleted keys | Available for some range choices, determines if deleted keys are to be included in the report. |

### Producing the report

### Output options

| Option | Description |
|---|---|
| Print | The report is printed to the printer you have selected. |
| Preview | The report is previewed on your screen. See <u>Previewing reports</u>[108] for more information. |
| Email | The report is sent via email as a PDF attachment. |

## 8.21.3    Reporting on doors

### Getting started

- You must be logged in

- From the **Reports** menu, select **Doors**

### Range

The range specifies the set of data that will be included in the report. Here is an explanation of the range choices:

| Range | Description |
|---|---|
| Which doors do you want to include | **All doors**: All doors are printed.<br><br>**All doors in a system**: You must select a system.  All doors in the system are printed.<br><br>**Doors accessible by a key holder**: You must select a key holder.  All doors accessed by keys issued to that key holder are printed.<br><br>**Doors accessible by key holders in a category**: You must select a key holder category.  All doors accessed by keys on issue to any key holders in that category are printed.<br><br>**Doors in an area**: You must select an area.<br><br>**A selection of doors**: You must select the doors to print by using the Select doors and Remove door links.<br><br>**Doors accessible by a selection of keys**: You must select the keys to print by using the Select keys and Remove key links. |

### Print building plans

When you have "Plan" PDF documents loaded, and the user has permissions (See Users□23) then the is a drop down list to select a building plan document and an associated print button.

See Working with system documents□41 for information about adding documents.

The application associated with PDF files on your computer is called to do the printing.

When you choose to print doors by area, and select an area, then if a document description matches the area it will be selected automatically.

### Options

Options modify the way the report appears, or the data included in the report. Here is an explanation of the option choices:

| Option | Description |
|---|---|
| Report layout | The report layout determines the type or report that will be printed and also what other options are available.<br><br>**Doors**: Produces a list of doors.<br><br>**Doors with keys**: Produces a list of doors, showing for each door the keys that operate the door. |

| | Keying matrix: Produces a grid with doors on the left and keys at the top, with indicators to show where a key operates a door.<br><br>Keying matrix - large format: Same as the keying matrix for formatted for A3 size paper.  See also Printer setup□36.<br><br>Doors with door hardware: Produces a list of doors and for each door the hardware that is recorded for the door. |
|---|---|
| Show door stamping | Choose if the door stamping is to be included in the door information shown. |
| Show door notes | Choose if any door notes are shown for each door. |
| Show key holders | Choose if key holders who have access to the door are shown for each door. |
| Include deleted keys | Layout: Doors with keys.  Choose if deleted keys are included or not. |
| Show door description | Layout: Keying matrix.  Choose if door descriptions are shown. |
| Show door area | Layout: Keying matrix.  Choose if door areas are shown. |
| Show keys that are not used by any doors | Layout: Keying matrix.  Choose if keys that do not access any of the included doors are displayed or not. |
| Include doors without hardware | Layout: Doors with door hardware.  Choose if the report displays only doors that have hardware recorded or if doors without hardware are shown also. |

**Producing the report**

**Output options**

| Option | Description |
|---|---|
| Print | The report is printed to the printer you have selected. |
| Preview | The report is previewed on your screen. See Previewing reports□108 for more information. |
| Email | The report is sent via email as a PDF attachment. |

## 8.21.4     Reporting on key holders

This is an important report for getting all information about key holders, what keys they hold, and the history of their key holdings and what doors they have access to.

**Getting started**

- You must be logged in

- From the **Reports** menu, select **Key holders**

**Range**

The range specifies the set of data that will be included in the report. Here is an explanation of the range choices:

| Range | Description |
|---|---|
| Which key holders do you want to include | **All key holders**: All key holders are printed.<br><br>**A single key holder**: You must select a key holder. |

| | **All key holders in a category**: You must select a key holder category. |
|---|---|
| | **All key holders who have keys for a system**: You must select a system. |

## Options

Options modify the way the report appears, or the data included in the report. Here is an explanation of the option choices:

| Option | Description |
|---|---|
| Show door information | Choose to show doors for each key holder that are currently accessible. |
| Include keys that have been returned | Choose if only keys currently on issue are shown or also those that have been returned. This choice affects which key holders are included in the range you selected. |
| Start a new page for each key holder | Forces each key holder to begin on a new page, making it easier to distribute portions of the report to each key holder. |
| Show key holder address | Choose to include the key holder address on the report. |

## Producing the report

### Output options

| Option | Description |
|---|---|
| Print | The report is printed to the printer you have selected. |
| Preview | The report is previewed on your screen. See [Previewing reports]<sup>108</sup> for more information. |
| Email | The report is sent via email as a PDF attachment. |

## 8.21.5    Reporting on key cabinets

This report shows keys currently in a key cabinet and is used to help check your key cabinets against the data recorded for them.

### Getting started

- You must be logged in

- From the **Reports** menu, select **Key cabinet**

### Range

The range specifies the set of data that will be included in the report. Here is an explanation of the range choices:

| Range | Description |
|---|---|
| System | Choose all systems or a single system |
| Cabinet | Choose all cabinets or a single cabinet. |

### Options

Options modify the way the report appears, or the data included in the report. Here is an explanation of the option choices:

| Option | Description |
|---|---|

| Layout | **By key**: Key bunches that fit the range are shown first, followed by every key that fits the range (with information about issue numbers) |
|---|---|
| | **By hook**: Each hook is shown followed by a list of key bunches, keys and corresponding issue numbers for keys on the hook. |

**Producing the report**

**Output options**

| Option | Description |
|---|---|
| Print | The report is printed to the printer you have selected. |
| Preview | The report is previewed on your screen. See <u>Previewing reports</u><sup>108</sup> for more information. |
| Email | The report is sent via email as a PDF attachment. |

## 8.21.6     Reporting on key quantities by status

This report shows each key and gives various totals for each key such as the quantity on issue, quantity on hook, quantity lost etc.

**Getting started**

- You must be logged in

- From the **Reports** menu, select **Key quantity by status**

**Range**

The range specifies the set of data that will be included in the report. Here is an explanation of the range choices:

| Range | Description |
|---|---|
| System | Choose all system or select a single system |

**Producing the report**

**Output options**

| Option | Description |
|---|---|
| Print | The report is printed to the printer you have selected. |
| Preview | The report is previewed on your screen. See <u>Previewing reports</u><sup>108</sup> for more information. |
| Email | The report is sent via email as a PDF attachment. |

## 8.21.7     Producing a lost key form

This report produces paperwork to document the loss of keys with a signature from the key holder.

**Getting started**

- You must be logged in

- From the **Reports** menu, select **Lost key form**.

**Range**

The range specifies the set of data that will be included in the report. Here is an explanation of the range

choices:

| Range | Description |
|---|---|
| Who has lost the keys | You must select the key holder who has lost the keys. Initially the key holder selection window is displayed, or you may access it again by clicking the **Choose key holder** link. |

## Options

Options modify the way the report appears, or the data included in the report. Here is an explanation of the option choices:

| Option | Description |
|---|---|
| Print all keys on issue | All keys on issue to the key holder are printer on the form. |
| Print selected keys | You must select which of the keys on issue to the key holder to print. |

**Producing the report**

**Output options**

| Option | Description |
|---|---|
| Print | The report is printed to the printer you have selected. |
| Preview | The report is previewed on your screen. See [Previewing reports]<sup>108</sup> for more information. |
| Email | The report is sent via email as a PDF attachment. |

## 8.21.8    Reporting on lost and broken keys

This report gives a list of keys that have been lost or broken, including information the key holder who made the loss. In the Premium edition you may specify the risk level to include.

**Getting started**

- You must be logged in

- From the **Reports** menu, select **Lost and broken keys**

**Range**

The range specifies the set of data that will be included in the report. Here is an explanation of the range choices:

| Range | Description |
|---|---|
| System | Choose all system or select a single system |

**Options**

Options modify the way the report appears, or the data included in the report. Here is an explanation of the option choices:

| Option | Description |
|---|---|
| Show lost keys | Choose to include lost keys. |
| Show broken keys | Choose to include broken keys. |
| Show key holder who lost each key | Shows the name of the key holder who lost each key. |

| | |
|---|---|
| Show user who authorised each key | Shows the name of the user who recorded the lost or broken key. |
| Show date that each key was lost or broken | Shows the date when the key was lost or broken. |
| Date range | Select the date range to be included in the report. Keys are included if the key was lost or broken in the specified date range. |
| Minimum risk level to include | Premium edition. If you have classified your keys with a risk level, this option allows you to specify a minimum risk level to include in the report, thereby allowing you to restrict the report to only the most risky key losses. |
| Include keys where he risk level has not been specified | Premium edition.  Allows you to include or exclude keys that do not have a risk level set. |

**Producing the report**

**Output options**

| Option | Description |
|---|---|
| Print | The report is printed to the printer you have selected. |
| Preview | The report is previewed on your screen. See <u>Previewing reports</u><sup>⌐108</sup> for more information. |
| Email | The report is sent via email as a PDF attachment. |

## 8.21.9     Reporting on compromised doors

This report lists doors that have been compromised by the loss of keys.  This report is complimentary to the lost and broken keys report, showing the impact on doors from the lost keys listed in the other report.

**Getting started**

- You must be logged in

- From the **Reports** menu, select **Compromised doors**

**Range**

The range specifies the set of data that will be included in the report. Here is an explanation of the range choices:

| Range | Description |
|---|---|
| System | Choose all system or select a single system |

**Options**

Options modify the way the report appears, or the data included in the report. Here is an explanation of the option choices:

| Option | Description |
|---|---|
| Minimum risk level to include | Premium edition. If you have classified your keys with a risk level, this option allows you to specify a minimum risk level to include in the report, thereby allowing you to restrict the report to only the most risky key losses. |
| Include keys where he risk level has not been specified | Premium edition.  Allows you to include or exclude keys that do not have a risk level set. |

**Producing the report**

**Output options**

| Option | Description |
|--------|-------------|
| Print | The report is printed to the printer you have selected. |
| Preview | The report is previewed on your screen. See <u>Previewing reports</u>[108] for more information. |
| Email | The report is sent via email as a PDF attachment. |

## 8.21.10    Producing a signature change request form

This report is used in conjunction with your locksmith to request signatory changes on a system.  It is applicable only to locksmith maintained systems.

No changes are made to your signatories.  Any changes you request are printed on the report for your locksmith who will then make the changes in their installation of ProMaster Master-Keying.  Changes will show in your system after importing a data update from your locksmith.

**Getting started**

- You must be logged in

- From the **Reports** menu, select **Signature change request form**

**Range**

The range specifies the set of data that will be included in the report. Here is an explanation of the range choices:

| Range | Description |
|-------|-------------|
| System | After selecting this report, you must choose a locksmith maintained system. |

**Specifying signatory changes**

A list of existing signatories is shown.

- Use the **Add**, **Remove** and **Properties** buttons to make changes

- To request that an inactive signatory is reactivated, use the **Make active** button.

- To discard changes to a signatory, use the **Undo changes** button.

**Producing the report**

**Output options**

| Option | Description |
|--------|-------------|
| Print | The report is printed to the printer you have selected. |
| Preview | The report is previewed on your screen. See <u>Previewing reports</u>[108] for more information. |
| Email | The report is sent via email as a PDF attachment. |

## 8.21.11    Reporting on orders by status

This report lists key orders with information about each order.

**Getting started**

- You must be logged in

- From the **Reports** menu, select **Orders by status**

**Range**

The range specifies the set of data that will be included in the report. Here is an explanation of the range choices:

| Range | Description |
|---|---|
| System | Choose all system or select a single system |

**Options**

Options modify the way the report appears, or the data included in the report. Here is an explanation of the option choices:

| Option | Description |
|---|---|
| Which job status do you want to include | Use these 4 options to control the job status that will be included in the report. |

**Producing the report**

**Output options**

| Option | Description |
|---|---|
| Print | The report is printed to the printer you have selected. |
| Preview | The report is previewed on your screen. See <u>Previewing reports</u> 108 for more information. |
| Email | The report is sent via email as a PDF attachment. |

## 8.21.12   Reporting on key order history

This report lists keys and each time the key is ordered.

**Getting started**

- You must be logged in

- From the **Reports** menu, select **Key order history**

**Range**

The range specifies the set of data that will be included in the report. Here is an explanation of the range choices:

| Range | Description |
|---|---|
| Which keys do you want to include | **All keys**: All keys are printed.<br><br>**All keys in a system**: You must select a system.  All keys in the system are printed.<br><br>**A selection of keys**: You must select the keys to print by using the **Select keys** and **Remove key** links. |

**Producing the report**

**Output options**

| Option | Description |
| --- | --- |
| Print | The report is printed to the printer you have selected. |
| Preview | The report is previewed on your screen. See [Previewing reports](#)▯108 for more information. |
| Email | The report is sent via email as a PDF attachment. |

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## 8.21.13 Reporting on key issue activity

This report gives you a look at "what's been going on".

**Getting started**

- You must be logged in

- From the **Reports** menu, select **Key issue activity**

**Range**

The range specifies the set of data that will be included in the report. Here is an explanation of the range choices:

| Range | Description |
| --- | --- |
| Which keys do you want to include | **All keys**: All keys are printed.<br><br>**All keys in a system**: You must select a system.<br><br>**Keys issued to a key holder**: You must select a key holder.  All keys issued to that key holder are printed.<br><br>**Keys issued to key holders in a category**: You must select a key holder category.  All keys on issue to any key holders in that category are printed.<br><br>**A selection of keys**: You must select the keys to print by using the **Select keys** and **Remove key** links.<br><br>**Keys issued or returned by a user**: You must select the user. |

**Options**

Options modify the way the report appears, or the data included in the report. Here is an explanation of the option choices:

| Option | Description |
| --- | --- |
| Date range | Select the date range to be included in the report. Activity is included if the key issue time or the key return time is in the specified date range. |

**Producing the report**

**Output options**

| Option | Description |
| --- | --- |
| Print | The report is printed to the printer you have selected. |
| Preview | The report is previewed on your screen. See [Previewing reports](#)▯108 for more information. |

| | |
|---|---|
| Email | The report is sent via email as a PDF attachment. |

## 8.21.14    Reporting on key hierarchy

See the topic [Key hierarchy]□⁴⁹ to learn about accessing this report.

### Options

The range specifies the set of data that will be included in the report. Here is an explanation of the range choices:

| Option | Description |
|---|---|
| Show key description | When selected, key number and key description will be shown on the report and fewer columns will be used. |

### Producing the report

### Output options

| Option | Description |
|---|---|
| Print | The report is printed to the printer you have selected. |
| Preview | The report is previewed on your screen. See [Previewing reports]□¹⁰⁸ for more information. |
| Email | The report is sent via email as a PDF attachment. |

## 8.21.15    Reporting on key bunches

See the topic [Searching for key bunches]□⁵⁹ to learn about accessing this report.

### Options

The range specifies the set of data that will be included in the report. Here is an explanation of the range choices:

| Option | Description |
|---|---|
| Show keys in the bunch | Lists the keys in the key bunch |
| Show doors accessed by the bunch | Lists the doors operated by the keys in the key bunch |

### Producing the report

### Output options

| Option | Description |
|---|---|
| Print | The report is printed to the printer you have selected. |
| Preview | The report is previewed on your screen. See [Previewing reports]□¹⁰⁸ for more information. |
| Email | The report is sent via email as a PDF attachment. |

## 8.21.16    Producing a list of key bunches

### Getting started

- You must be logged in

- From the **Reports** menu, select **Key bunch list**

---

**Range**

The range specifies the set of data that will be included in the report. Here is an explanation of the range choices:

| Range | Description |
|---|---|
| Status | Choose the key bunch status you want to report on. |
| Key | You may choose a key and only those key bunches containing the key will be printed. |

**Producing the report**

**Output options**

| Option | Description |
|---|---|
| Print | The report is printed to the printer you have selected. |
| Preview | The report is previewed on your screen. See [Previewing reports]108 for more information. |
| Email | The report is sent via email as a PDF attachment. |

## 8.21.17     Producing a key issue responsibility acceptance report

This report is produced when issuing keys, or see the topic [Searching for key holders]74 to learn about accessing this report at other times.

The text printed on this report is set by the [key holder category]26 that is assigned to the key holder.

**Range**

The range specifies the set of data that will be included in the report. Here is an explanation of the range choices:

| Range | Description |
|---|---|
| What date range do you want included | Choose when the keys were issued |

**Options**

Options modify the way the report appears, or the data included in the report. Here is an explanation of the option choices:

| Option | Description |
|---|---|
| Show area for signature | Included an area on the report for the key holder to sign |

**Producing the report**

**Output options**

| Option | Description |
|---|---|
| Print | The report is printed to the printer you have selected. |
| Preview | The report is previewed on your screen. See [Previewing reports]108 for more information. |
| Email | The report is sent via email as a PDF attachment. |

### 8.21.18 Producing a key return confirmation report

This report is produced when returning keys, or see the topic <u>Searching for key holders</u>[]74 to learn about accessing this report at other times.

The text printed on this report is set by the <u>key holder category</u>[]26 that is assigned to the key holder.

#### Range

The range specifies the set of data that will be included in the report. Here is an explanation of the range choices:

| Range | Description |
| --- | --- |
| What date range do you want included | Choose when the keys were returned |

#### Producing the report

#### Output options

| Option | Description |
| --- | --- |
| Print | The report is printed to the printer you have selected. |
| Preview | The report is previewed on your screen. See <u>Previewing reports</u>[]108 for more information. |
| Email | The report is sent via email as a PDF attachment. |

### 8.21.19 Producing a key order report

This report is produced when from an order, or see the topic <u>Entering orders</u>[]56 to learn about accessing this report.

#### Producing the report

#### Output options

| Option | Description |
| --- | --- |
| Print | The report is printed to the printer you have selected. |
| Preview | The report is previewed on your screen. See <u>Previewing reports</u>[]108 for more information. |
| Email | The report is sent via email as a PDF attachment. |

### 8.21.20 Reporting on keys on an order

This report is produced when from an order, or see the topic <u>Entering orders</u>[]56 to learn about accessing this report.

#### Producing the report

#### Output options

| Option | Description |
| --- | --- |
| Print | The report is printed to the printer you have selected. |
| Preview | The report is previewed on your screen. See <u>Previewing reports</u>[]108 for more information. |
| Email | The report is sent via email as a PDF attachment. |

## 8.21.21 Reporting on overdue issues

This report shows each key holder with overdue keys and a list for each key holder of those keys and key bunches.

See the topic Working with overdue issues[78] to learn about accessing this report.

**Range**

The range specifies the set of data that will be included in the report. Here is an explanation of the range choices:

| Range | Description |
|---|---|
| Choose which overdue keys to show | The drop down list gives numerous choices to refine the range of overdue keys that are included in the report.  The default value offered is that previously selected in Working with overdue issues[78] |

**Producing the report**

**Output options**

| Option | Description |
|---|---|
| Print | The report is printed to the printer you have selected. |
| Preview | The report is previewed on your screen. See Previewing reports[108] for more information. |
| Email | The report is sent via email as a PDF attachment. |

## 8.21.22 Reporting on fees

Premium edition only.

This report shows fees taken and refunded.

**Getting started**

- You must be logged in

- From the **Reports** menu, select **Fees**

**Range**

The range specifies the set of data that will be included in the report. Here is an explanation of the range choices:

| Range | Description |
|---|---|
| Which keys do you want to include | **All keys**: All keys are printed.<br><br>**All keys in a system**: You must select a system.<br><br>**Keys issued to a key holder**: You must select a key holder.  All keys issued to that key holder are printed.<br><br>**Keys issued to key holders in a category**: You must select a key holder category.  All keys on issue to any key holders in that category are printed.<br><br>**A selection of keys**: You must select the keys to print by using the **Select keys** and **Remove key** links. |

| | Keys issued or returned by a user: You must select the user. |
|---|---|

### Options

Options modify the way the report appears, or the data included in the report. Here is an explanation of the option choices:

| Option | Description |
|---|---|
| Date range | Select the date range to be included in the report. |
| Date range application | Determines if the date range is applied to the date the fee was taken or when it was refunded (if applicable) |
| Show only fees not refunded | If the date range is applied to the date the fee was taken, then gives the ability to exclude fees that have been refunded. |
| Include lost key fees | If the date range is applied to the date the fee was taken, then includes fees for lost keys. |
| Include broken key fees | If the date range is applied to the date the fee was taken, then includes fees for broken keys. |

### Producing the report

### Output options

| Option | Description |
|---|---|
| Print | The report is printed to the printer you have selected. |
| Preview | The report is previewed on your screen. See Previewing reports[]108 for more information. |
| Email | The report is sent via email as a PDF attachment. |

## 8.21.23    Reporting on pre-issue emails

Premium edition only.

This report shows pre-issue emails sent.

### Getting started

- You must be logged in

- From the **Reports** menu, select **Pre-issue keys emails**

### Range

The range specifies the set of data that will be included in the report. Here is an explanation of the range choices:

| Range | Description |
|---|---|
| Which pre-issues do you want to include | **All pre-issue email**: All items are printed.<br><br>**Pre-issues to a key holder**: You must select a key holder.  All pre-issues to that key holder are printed.<br><br>**Pre-issues to a key holders in a category**: You must select a key holder category.  All pre-issues to any key holders in that category are printed.<br><br>**Pre-issues by a user**: You must select the user. |

**Options**

Options modify the way the report appears, or the data included in the report. Here is an explanation of the option choices:

| Option | Description |
|---|---|
| Date range | Select the date range to be included in the report. |

**Producing the report**

**Output options**

| Option | Description |
|---|---|
| Print | The report is printed to the printer you have selected. |
| Preview | The report is previewed on your screen. See [Previewing reports]108 for more information. |
| Email | The report is sent via email as a PDF attachment. |

# 8.22 Exporting data

## 8.22.1 Export data for all key issues

A simple wizard is provided to export information about every key issue.  The export file produced may then be used in other applications or with Microsoft Excel to perform further analysis.

This data dump allows you to perform specialist reporting in other tools.

**Getting started**

- You must be logged in

- From the **File** menu, choose **Export** then **Export data for all key issues**

**Exporting data**

- Choose a file name for the export.

- Choose a system or all systems.

- Choose if column headings are required.

- Choose options for what to do after the export.

- Click **Finish** to make the export.

## 8.22.2 Export keys on issue data

A simple wizard is provided to export information about all keys currently on issue, the associated key holder and the issue time etc.  The export file produced may then be used in other applications or with Microsoft Excel to perform further analysis.

This data dump allows you to perform specialist reporting in other tools.

**Getting started**

- You must be logged in

- From the **File** menu, choose **Export** then **Export keys on issue data**

**Exporting data**

- Choose a file name for the export.

- Choose a system or all systems.

- Choose if column headings are required.

- Choose options for what to do after the export.

- Click **Finish** to make the export.

## 8.22.3      Export keying to HTML

A simple wizard is provided to export door, key and keying information for a system to an html file.  The export file produced may then viewed in a web browser to allow people not using ProMaster Key Manager to see the system.

### Getting started

- You must be logged in

- From the **File** menu, choose **Export** then **Export keying to HTML**

### Exporting data

- Choose a file name for the export.

- Choose a system.

- Choose all doors, or select one or more door areas

- Choose options for what to do after the export.

- Click **Finish** to make the export.

**Appendix**

# Part

# 9

# 9      Appendix

## 9.1      Diagnostic functions

### 9.1.1      Diagnosing a bad connection

If you are unable to connect to the ProMaster Key Manager database, you may gain some insight into the problem by running the Diagnose connection routines.

#### Getting started

- On the main ProMaster Key Manager window, select the Environment you are unable to connect to.

- From the **Tools** menu, select the item **Diagnose database connection**

At the top your connection details are shown, so the first thing you should determine is if this information is correct.

#### Running a test

Depending on the edition you are running, there will be one or more tests available.  To perform a test, first highlight the test that you want, then click the **Test** button. The results of the test are displayed at the bottom of the window, and when a test is completed successfully the test is flagged with a check mark.

#### The tests - Basic edition

**Test database connection**

This test attempts to connect to the database and reports any errors that occur.

#### The tests - Premium edition

**Resolve host**

This test takes the host name and resolves it to an IP Address. If the host name is already an IP Address (e.g. 127.0.0.1) then the Resolve host test will indicate that the host name does not need to be resolved. In all other cases, the test should resolve the host name to the IP Address of the machine that is hosting the database. If the name cannot be resolved, first check that the host name is correct, then address the name resolution issue with your computer network support person.

**Ping host**

This test attempts to ping the host. While a successful outcome for this test is useful in knowing that communication is possible, a failed test does not necessarily indicate a problem as the host machine may be configured to not respond to ping requests, or another network appliance may be blocking the ping (ICMP) requests.

**Resolve service port**

This test is offer only if the Server name contains a service port reference.  This test looks up the name port name specified and expects to resolve it to a port number.

**Test port**

This test attempts to open a socket on the host machine on on the port specified in the Server name, or that resolved from the service port name if a service port name was specified. This test must succeed otherwise there is a problem. The success of this test does not however indicate that the Firebird database engine is the process that responded to the test, and in rare cases the socket connection request may be answered by another process that has hijacked the database port on the host machine.

**Test database connection**

This is the definitive test. If this test passes then ProMaster Key Manager should connect to the database, whereas if this test fails then ProMaster Key Manager will fail to operate. Any error messages returned from this test are indicators of the source of any problems.

## 9.1.2 Fixing internal numbering

Internally, ProMaster Key Manager tracks and identified data in a way that is not visible to the user.

If the need arises during a technical support incident, you may be asked to perform the following operation.

**Getting started**

- You must be logged in as the **admin** user

- From the **Tools** menu, select **Synchronize internal numbering**

- Click the **OK** button to proceed.

The operation may take a small amount of time, dependent on the amount of data in your database.

> Never run this process while other users are using ProMaster Key Manager. Run this process only if you are asked to by WH Software Limited support staff.

# File formats used by ProMaster Key Manager

**Part**

**10**

# 10 File formats used by ProMaster Key Manager

## 10.1 CSV file format definition

Wherever data may be imported into ProMaster Key Manager from a Comma Separated File (CSV), the contents expected within the file vary according to the type of data and that is discussed in the applicable topic. This topic discusses the physical structure of a CSV file and therefore this section forms an integral part of the learning for any CSV import.

### File Format

The CSV file follows standard CSV file conventions with regard to its physical structure.

That is:

- Each line in the file contains a single record.
- Each line in the file is terminated by a Carriage Return and Line Feed pair of characters.
- Within each record (line) fields are delimited (separated) by using a single comma.
- A delimiting comma must not appear after the final field in each line.
- Each line must contain the same number of fields.
- Any field that contains a comma (,) or quotation mark (") must be quoted according to standard quoting rules (The field is prefixed and suffixed with a quotation mark, and any quotation mark is repeated)

### File Names

CSV files should always be supplied with:

- A file name that clearly describes the file contents
- The file extension being .csv

### Headings

It is common when using CSV files for the first line in the file to contain field or column heading that describe the data on the subsequent lines.

ProMaster Key Manager will accept a file with or without the first line containing headings, however it is strongly recommended that the file does contain these headings as it effectively documents the data that is contained within the file and also ProMaster Key Manager will read these headings to automatically determine the contents of each field. This is particularly important as ProMaster Key Manager does not mandate the order in which fields appear in the CSV file.

Omitting the headings means that the person importing the data into ProMaster Key Manager will do so with less certainty about the fields being imported.

## 10.2 Key holder import (CSV) file format

ProMaster Key Manager provides a wizard for importing key holder data that is supplied in a comma separated values (CSV) file. This topic explains the file contents required.

For information about the physical structure of a CSV file, read the topic CSV file format definition[102]

### Headings

The table below shows one heading that ProMaster Key Manager will accept for automatically determining the contents of each field. For each field there are several variations that are checked.

For example, to determine the field containing the **Last name** from the heading, the following headings are matched: last, lastname, last name, surname, family, familyname, family name

Additionally, headings are matched in a case insensitive manner.

**Fields**

The order of the fields within the CSV fields is not important as the ProMaster Key Manager key holder import (CSV) wizard provides a powerful interface for selecting the source of each item of data.

The following table list all the fields that ProMaster Key Manager will accept for this import.

| Field Name | Type/ Max Len | Reqd | Heading | Notes |
|---|---|---|---|---|
| First names | Character (50) | Yes | FirstName | |
| Last name | Character (50) | Yes | LastName | |
| Employee No | Character (30) | No* | EmployeeNo | Required if employee number is treated as the primary search field |
| Area | Character (100) | No | Area | |
| Category | Character | Yes | Category | Length is not important as the value provided gets mapped onto existing key holder category values. |
| Company | Character (50) | No | Company | |
| Address 1 | Character (30) | No | Address1 | |
| Address 2 | Character (30) | No | Address2 | |
| Address 3 | Character (30) | No | Address3 | |
| City | Character (30) | No | City | |
| State | Character (5) | No | State | |
| Post code | Character (10) | No | PostCode | |
| Country | Character (30) | No | Country | |
| Business ph | Character (20) | No | BusinessPh | |
| Mobile ph | Character (20) | No | MobilePh | |
| Home ph | Character (20) | No | HomePh | |
| Fax | Character (20) | No | Fax | |
| Email | Character (200) | No | Email | |
| Card no | Character (30) | No | Card | |
| Proximity | Character (30) | No | Proximity | |
| Access code | Character (30) | No | AccessCode | |
| Alarm code | Character (30) | No | AlarmCode | |

If employee number is treated as the primary search field then employee number must be unique in the file, otherwise the combination of First names, last name and company must be unique in the file.

## 10.3 Key issue holdings import (CSV) file format

ProMaster Key Manager provides a wizard for importing key issue holding data that is supplied in a comma separated values (CSV) file. This topic explains the file contents required.

For information about the physical structure of a CSV file, read the topic

**Headings**

The table below shows one heading that ProMaster Key Manager will accept for automatically determining the contents of each field. For each field there are several variations that are checked.

For example, to determine the field containing the **Last name** from the heading, the following headings are matched: last, lastname, last name, surname, family, familyname, family name

Additionally, headings are matched in a case insensitive manner.

### Fields

The order of the fields within the CSV fields is not important as the ProMaster Key Manager key issue holding import (CSV) wizard provides a powerful interface for selecting the source of each item of data.

The following table list all the fields that ProMaster Key Manager will accept for this import.

| Field Name | Type/ Max Len | Reqd | Heading | Notes |
|---|---|---|---|---|
| First names | Character (50) | Yes | FirstName | |
| Last name | Character (50) | Yes | LastName | |
| Employee No | Character (30) | No* | EmployeeNo | Required if employee number is treated as the primary search field |
| Company | Character (50) | Yes* | Company | Required if employee number is not treated as the primary search field |
| System number | Character (20) | Yes | SystemNumber | |
| Key number | Character (20) | Yes | KeyNumber | |
| Issue number | Integer | Yes | IssueNumber | 1 or greater.  The combination of System Number, Key Number and Issue Number must represent a key that exists, is on hook and is not part of a key bunch. |
| Issue time | Date / Time | Yes | IssueTime | Must contain a valid date and time when the key was issued |
| Issue reason | Character (100) | Yes | IssueReason | Field is required in the import but may contain a blank value |
| Return by time | Date / Time | Yes | ReturnByTime | Must contain a valid date and time when the key is to be returned by or may be blank for permanent issue |
| Authorised by | Character (100) | Yes | AuthorisedBy | Field is required in the import but may contain a blank value |
| Deposit amount | Numeric (5,2) | No | DepositAmount | Premium edition only.<br>If importing a deposit amount, blank or 0 will not record a deposit.  Valid values for a deposit are 0.01 to 999.99 |
| Deposit time | Date / Time | No | DepositTime | Premium edition only.<br><br>Meaningful only if Deposit Amount field is specified and Deposit Amount is valid.  Then, if the Deposit Time column is specified it must have a valid value.<br><br>If the Deposit Time field is not specified, then any deposits will use the Issue Time. |

| Deposit reference | Character (100) | No | DepositReference | Premium edition only.<br><br>Meaningful only if Deposit Amount field is specified and Deposit Amount is valid. |
|---|---|---|---|---|

**Miscellaneous information**

# Part

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# 11    Miscellaneous information

## 11.1    Previewing reports

For many reports you may do a screen preview rather than sending them to your printer. This is useful for checking that the report is producing the results that you expect before you commit to printing it.

### Zooming

The buttons provide three zoom settings (Whole page, Zoom to page width, Zoom to 100%) or you may enter a specific zoom value in the edit box.  Additionally, the zoom setting can be altered by holding the ctrl key down and using your mouse wheel.

### Navigating

For multi-page reports, buttons are available for moving between pages, or use standard keyboard navigation (Ctrl+PgDn, Ctrl+PgUp, Ctrl+Home, Ctrl+End) or the mouse wheel.

## 11.2    Forgotten admin password

If you have forgotten your admin password, you may reset it by entering your registration code.

### Getting started

- On the main ProMaster Key Manager window, select the Environment you are unable to connect to.

- From the **Tools** menu, select the item **Reset Admin password**

### Resetting password

Enter your registration code then click **OK**.

If the details are correct then the admin password will be reset to password.

> You should immediately login as **admin** (with password **password**) and then change the password to a secure one.

## 11.3    Unlocking the console

If ProMaster Key Manager has been configured in the Application Parameters to lock the console after a time of inactivity, then one of two things will happen.

- If ProMaster Key Manager is at the main window, then you will be logged out.

- If you have a window open where you may be performing a task, then ProMaster Key Manager locks the console. To unlock the console, the user who is logged in must enter their password, or alternatively, the holder of the admin password may perform an admin unlock.

> The admin unlock is useful for times where the user has disappeared, and the admin wishes to unlock the ProMaster Key Manager and log the user out.

## 11.4    Image editor

ProMaster Key Manager includes an image editor that allows you to tweak pictures. The image editor is not a drawing tool.

The image editor is used for signatory photos, key holder photos and scanning a signed key acceptance (Premium edition only)

### Invoking the image editor

There are several ways in which the image editor is invoked:

- After you **load** a picture it is displayed in the image editor.

- After you **acquire** an image from your scanner it is displayed in the image editor.

- After you **paste** an image from the clipboard it is displayed in the image editor.

- After you click an **Edit image** button.

### Resize image

When the image editor is loaded as a result of a new image being loaded (load, scanner or paste from clipboard), the size of the image is checked.

If the image dimensions exceed the preferred size preset for that image purpose then you are presented with the **Resize Image** dialog. As you will not be allowed to save the image unless it is within the maximum allowed dimensions, then you should proceed with the image resize.

**Options are provided to:**

- Allow the width and height to be set.

- Allow the width and height to be set independently (The image will be stretched in one direction) .

- Quickly set the **Preferred size**.

Specify the interpolation algorithm to use when resizing the image (Generally the default is best).

The status bar at the bottom of the image editor shows you the image dimensions, the storage required and the image format.

### Menu options

| Menu Item | Description |
|---|---|
| Edit \| Undo | Undo the last change you made to the picture. |
| Edit \| Revert to original | Undo all changes you have made to the picture, reverting to the picture you started with. |
| Edit \| Clear selection | Clear the area you have selected with your mouse. |
| Edit \| Crop to selection | Crop the picture, leaving just the area you have selected with your mouse. |
| Edit \| Save as... | Save the picture as a file so you can use it else where. |
| Image \| Rotate left 90 | Rotate the picture left by 90 degrees. |
| Image \| Rotate right 90 | Rotate the picture right by 90 degrees. |
| Image \| Flip horizontal | Flip the picture horizontally. |
| Image \| Flip vertical | Flip the picture vertically. |
| Image \| Increase brightness | Increase the brightness of the picture. |
| Image \| Decrease brightness | Decrease the brightness of the picture. |
| Image \| Increase contrast | Increase the contrast of the picture. |
| Image \| Decrease contrast | Decrease the contrast of the picture. |
| Image \| Gamma | Alter the picture gamma. |
| Image \| Resize... | Open the dialog for resizing the picture. |
| Image \| Colour depth... | Change the colour storage of the picture. Generally you should leave this as True Colour. |
| Image \| Image format | Change the format used to store the picture |
| Effects \| Blur | Blur the picture. |
| Effects \| Blur softly | Blur the picture. |

| Effects \| Blur more | Blur the picture. |
|---|---|
| Effects \| Sharpen | Sharpen the picture. |
| Effects \| Sharpen less | Sharpen the picture. |
| Effects \| Sharpen more | Sharpen the picture. |
| Effects \| De-speckle | Remove speckles from the picture. |
| Effects \| Edge enhance | Sharpen the edges of the picture. |
| View \| Zoom full size | Show the picture at 100% resolution. |
| View \| Zoom to fit | Show the picture sized to fit the window |
| View \| Zoom to selection | Show the picture with the area you have selected with your mouse taking the whole window. |
| View \| Zoom in | Show the picture larger. |
| View \| Zoom out | Show the picture smaller. |

**About image formats**

Generally, JPG is the best format for photos, giving the best compromise between quality and storage size. BMP and TIFF and PNG are all better than JPG for line drawings as they are loss-less formats, although of these three PNG is the most efficient.

**General use**

More often than not, the tasks you will be performing in the Image Editor are:

- Crop To Selection (For pictures where you want to remove the surrounding white space)

- Image Format (To ensure that the storage is not large)

- Resize (To ensure the picture is the preferred size)

When you have finished your changes, click **OK** to save the picture.

# 11.5    Disassociate system from locksmith

There are two types of systems in ProMaster Key Manager.  Standalone systems, which you create and over which you have full control, and locksmith systems which are provided and maintained by your locksmith.

If you wish to maintain a system yourself and never again get an update from your locksmith, you can achieve this by using the procedure to disassociate a system from a locksmith.

> In previous versions of ProMaster Key Manager, if the system had transferred between locksmiths or the locksmith had export and then imported the system (e.g. to work on it in another location) it was necessary to disassociate the system from the locksmith before importing it to rectify the internal discrepancies. This is no longer necessary with the latest version of ProMaster Key Manager BECAUSE THE IMPORT HANDLES THE SITUATION CORRECTLY.  **DO NOT DISASSOCIATE A SYSTEM FOR THIS PURPOSE.**

**Getting started**

- You must be logged in as the **admin** user

- From the **System** menu, select **Disassociate system from locksmith**

*Making a change*

Select the system to change.

You will be asked to verify the change, then click OK to make the change.

# 11.6      Data interface service

Premium edition only.

### Overview

The data interface service ("KM7IF") runs as a Windows service, and will import key holder information from a CSV file and also key system updates from your locksmith.

KM7IF may be run as an application for testing and configuration, but should be installed as a service to use it outside of testing (this ensures it is not closed unintentionally).

A data interface service is provided as a no-charge interface to Premium edition.  The free interface service requires that your ProMaster Key Manager registration be current for support and maintenance and that it is activated.

The program file is called KM7IF.exe and is located with the main program on your server.

KM7IF may be run in several modes.  If it is installed as a service, it starts and stops the same way any other service does.

If it is run as a program with the command line option -app then it runs as an application.  This is useful for testing as the program windows shows what is happening.  In the app mode there is a link to enter the setup screen.  If you wish to enter the setup screen without giving the program a chance to begin its normal function then you may start it with the command line options -app -setup

You may make shortcuts to run in the -app and also in the -app -setup modes.

You should use the -app -setup link for your initial setup, prior to running the program as an app or installing it as a service.

The program supports command line options for installing itself as a service.  See Command line options for more information.

When it is run as a service, make sure the user who launches the service (typically "system") has permissions to the folders you have configured.

### *Command line options*

| Option | Description |
|---|---|
| -help or -? | Shows command line help |
| -install | Install the program as a service.  The service is not started by this operation. You need so start it from services control panel applet or using the SC command.<br>When you run the program with the -install option from a CMD window to install it as a service, you MUST run the CMD window as Administrator otherwise the program will not have the necessary permissions to install as a service.<br>Do not try to use the SC command to install the program as a service as the internal service name MUST match that passed to the SC command and if you get it wrong the the service will be unable to start |
| -uninstall | Uninstall the service.  You should stop the service before attempting to uninstall it.<br>See the note above about the CMD window and administrator access.  The same applies to uninstalling. |
| -app | Runs as an application instead of as a service. |
| -setup | Used with -app, starts the setup screen immediately. |

### *General information*

When the program runs it verifies various settings and if the verification fails then it does not begin its tasks.

The various folders for each task must exist.

It connects to and validates the ProMaster Key Manager database.

The tasks run in order after each other when the time elapsed meets the setting "How many seconds to sleep between processing operations".

If the program is stopped while a task is running, the program will recognise this condition and whenever possible it will abort the task.

A single instance of the program is allowed.  You will not be able to start the service if the program is running as an app, and if it is running as a service then you will not be able to run it as an app.

The app mode is for testing and debugging.  App mode requires you to be logged into the computer.  For production use it should be run as a service.

### Configuration overview

The setup requires you to choose the ProMaster Key Manager environment (typically "Default").

On the Timing tab there are values for when the processing starts and how frequently it is performed.

On the Email tab there are settings for SMTP email delivery that are used if any tasks are configured to send email messages.

For each of the tasks, choose the folders that will be used.  For the csv imports, you may restrict the files examined by specifying the starting characters of files to look for (the default is "KH").

See each of the tasks below for task specific configuration information.

### Key Holder import

The file(s) that the program imports must start with the characters specified in the setup (if any) and end with ".csv".

Each line in the file must contain all data fields, even if they are empty.

> The EmployeeNo field is mandatory.  The data import will match only on the EmployeeNo and not on the names.

### File format

The first line of the file is must contain the header exactly as shown below:

```
FirstName,LastName,EmployeeNo,Area,Category,Company,Address1,Address2,Address3,City,State,PostCo
```

The order of the data fields in the file must match the header.

Example:

```
FirstName,LastName,EmployeeNo,Area,Category,Company,Address1,Address2,Address3,City,State,PostCo
Joe,Bloggs,100,,Full time employee,Bloggs Ltd,,,,,,,,,,,joe@bloggs.com,Yes
```

See CSV file format definition<sup>102</sup> for a general description of CSV files.

The ActiveFlag is checked for various Yes values (Y, Yes, T, True) and various No values (N, No, F, False)

The Category must match a key holder category that is already defined.

> IMPORTANT: Because the import will commence when a file is found, the process writing the file must not create it then keep it open while writing to it.  Often the best way to operate is to create the file with ".tmp as the file extension then when you have finished writing to it then rename it to the ".csv" file extension.

### log file

A log file in XML format is created in the folder you choose in the setup and is named according to the date and time. The file has error information, a summary and detailed information about any key holders where the active flag in the file is "No" but the key holder still has keys on issue.

The log file contains:

- A summary (Node Summary)

- Any error information (Node: Errors)

- Information about key holders that you specified as inactive but could not be deactivated (Node: DeactivateKeysOnIssueError)

- Information about key holders that were deactivated because they were not present in the import file (Node: DeactivateNotPresent)

- Information about key holders that were not present in the import file but could not be deactivated (Node: DeactivateNotPresentError)

**Options**

The option "Enable this task" must be checked for key holder files to be imported.

The option "Deactivate key holders that have an employee number if key holder is not present in the import file" determines what to do about key holders that are not in the import file. If this option is left unchecked then adding and updating key holders is performed only on the entries in your import file. If this option is checked, then after processing your import file, all key holders that have an employee number, and were not in the import file are considered for deactivating.

A key holder will not be deactivated if it has keys on issue. This rule is irrespective of whether you specify the key holder is inactive in the import file or whether it is considered for deactivation because it is not present in the import file (see previous paragraph).

Options are provided to generate email messages and restrict the email message delivery to only when a processing error occurs.

**System import**

This import process imports system data files from your locksmith, much as you would do using the ProMaster Key Manager user interface.

This import is useful if you have a mechanism to deliver update files from your locksmith to a folder on your ProMaster Key Manager server.

The files must be named starting PMKM_ and end with ".pm4". This is how they will be named when they are received from your locksmith.

**Restrictions**

There are some differences in how these files are processed by the data interface service compared to using the ProMaster Key Manager user interface.

- New systems will not be imported, only updates to systems that already exist in your ProMaster Key Manager.

- The system must be in its normal state, and not disassociated from the locksmith, and not transferred to another locksmith.

- The import file must be newer than the previous import file.

If any of the above conditions exist, you must import the system yourself using the ProMaster Key Manager user interface before the data interface service will accept update files for the system.

**Options**

The option "Enable this task" must be checked for system files to be imported.

Options are provided to generate email messages and restrict the email message delivery to only when a processing error occurs.

### Keys on issue export

This export process writes a csv file containing information about keys on issue that are due for return.

**Options**

The option "Enable this task" must be checked for keys on issue to be exported.

You can choose what hour of the day the export is to run.

If "Include keys that are not yet due" is not checked then only keys that have reached their due date and time will be written to the export file.

If "Include keys that are not yet due" is checked then the cut off date for keys that are "due soon" is determined by the value you set for "Number of days to include for keys to soon expire"

# ProMaster Key Manager version numbers

**Part**

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# 12    ProMaster Key Manager version numbers

The following table shows the various file format versions used in each product release version.

| Product | Database | ProMaster Master-Keying system update | ProMaster Master-Keying order |
|---|---|---|---|
| 7.5102.0.0 | 7002 | 7000 | 7000 |
| 7.5201.0.0 | 7002 | 7000 | 7000 |
| 7.5202.0.0 | 7002 | 7000 | 7000 |
| 7.5401.0.0 | 7002 | 7000 | 7000 |
| 7.5402.0.0 | 7002 | 7000 | 7000 |
| 7.5501.0.0 | 7002 | 7000 | 7000 |
| 7.5601.0.0 | 7002 | 7000 | 7000 |
| 7.5701.0.0 | 7002 | 7000 | 7000 |
| 7.5702.0.0 | 7002 | 7000 | 7000 |
| 7.5703.0.0 | 7002 | 7000 | 7000 |
| 7.5704.0.0 | 7002 | 7000 | 7000 |
| 7.5705.0.0 | 7003 | 7000 | 7000 |
| 7.5801.3.0 | 7003 | 7000 | 7000 |
| 7.5901.0.0 | 7003 | 7000 | 7000 |
| 7.6001.1.0 | 7003 | 7000 | 7000 |
| 7.6201.0.0 | 7003 | 7000 | 7000 |
| 7.6202.0.0 | 7003 | 7000 | 7000 |
| 7.6301.1.0 | 7003 | 7000 | 7000 |
| 7.6401.0.0 | 7003 | 7000 | 7000 |
| 7.6601.0.0 | 7003 | 7000 | 7000 |
| 7.6701.0.0 | 7003 | 7000 | 7000 |
| 7.6801.0.0 | 7003 | 7000 | 7000 |
| 7.6802.0.0 | 7003 | 7000 | 7000 |
| 7.6901.0.0 | 7003 | 7000 | 7000 |
| 7.7001.0.0 | 7003 | 7000 | 7000 |
| 7.7002.1.0 | 7003 | 7000 | 7000 |
| 7.7101.0.0 | 7003 | 7000 | 7000 |
| 7.7102.0.0 | 7004 | 7000 | 7000 |
| 7.7201.0.0 | 7005 | 7000 | 7000 |
| 7.7301.0.0 | 7005 | 7000 | 7000 |
| 7.7302.0.0 | 7005 | 7000 | 7000 |
| 7.7401.0.0 | 7005 | 7000 | 7000 |
| 7.7601.0.0 | 7005 | 7000 | 7000 |
| 7.7901.0.0 | 7005 | 7000 | 7000 |
| 7.8001.1.0 | 7005 | 7000 | 7000 |
| 7.8002.0.0 | 7005 | 7000 | 7000 |
| 7.8201.0.0 | 7005 | 7000 | 7000 |
| 7.8701.0.0 | 7005 | 7000 | 7000 |

| | | | |
|---|---|---|---|
| 7.9101.0.0 | 7005 | 7000 | 7000 |
| 7.9102.0.0 | 7005 | 7000 | 7000 |
| 7.9201.0.0 | 7005 | 7000 | 7000 |
| 7.9501.0.0 | 7005 | 7000 | 7000 |
| 7.9502.0.0 | 7005 | 7000 | 7000 |
| 7.9601.0.0 | 7005 | 7000 | 7000 |
| 7.9801.0.0 | 7005 | 7000 | 7000 |
| 7.9802.0.0 | 7005 | 7000 | 7000 |
| 7.10001.0.0 | 7005 | 7000 | 7000 |
| 7.10101.0.0 | 7005 | 7000 | 7000 |
| 7.10401.0.0 | 7006 | 7000 | 7000 |
| 7.10501.2.0 | 7006 | 7000 | 7000 |
| 7.10503.0.0 | 7006 | 7000 | 7000 |
| 7.10801.0.0 | 7007 | 7000 | 7000 |
| 7.10901.4.0 | 7007 | 7000 | 7000 |
| 7.11201.0.0 | 7007 | 7000 | 7000 |
| 7.11301.0.0 | 7007 | 7000 | 7000 |
| 7.11302.0.0 | 7007 | 7000 | 7000 |
| 7.11801.0.0 | 7007 | 7000 | 7000 |
| 7.12601.0.0 | 7008 | 7000 | 7000 |
| 7.12701.2.0 | 7008 | 7000 | 7000 |
| 7.12702.0.0 | 7008 | 7000 | 7000 |
| 7.12801.3.0 | 7008 | 7000 | 7000 |
| 7.12802.0.0 | 7008 | 7000 | 7000 |
| 7.12901.3.0 | 7009 | 7000 | 7000 |
| 7.13001.1.0 | 7009 | 7000 | 7000 |
| 7.13101.0.0 | 7009 | 7000 | 7000 |
| 7.13201.1.0 | 7009 | 7000 | 7000 |
| 7.13401.0.0 | 7009 | 7000 | 7000 |
| 7.14001.0.0 | 7009 | 7000 | 7000 |
| 7.14101.0.0 | 7009 | 7000 | 7000 |
| 7.14201.0.0 | 7009 | 7000 | 7000 |
| 7.15201.0.0 | 7009 | 7000 | 7000 |
| 7.15501.0.0 | 7009 | 7000 | 7000 |
| 7.16001.0.0 | 7009 | 7000 | 7000 |

# Summary of changes in ProMaster Key Manager updates

# Part

# 13

# 13      Summary of changes in ProMaster Key Manager updates

### Version 7.16001.0.0

### Orders

Sometimes not all order information was displayed when opening an existing job.  Fixed.

### Version 7.15501.0.0

### CSV Export

Some exports were using the wrong quote character - fixed.

### Version 7.15201.0.0

### System documents

Added the ability to save documents against a key system.

When printing door reports, if the user has the required permissions then building plan pdf documents will able to be printed.

### Version 7.14301.0.0

### Lost and broken keys

Premium edition only, tightened the security regarding key cabinets and systems that the user has permissions to as per key return, reissue, return/issue.

### Import from ProMaster Master Keying

Improvements importing non-ASCII characters in hardware associated with doors.

### Version 7.14201.0.0

### Key return, reissue, return/issue

Premium edition only, added an application parameter to restrict key return, reissue and return/issue to key cabinets and systems that the user has permissions to.  Turning this parameter on makes the same security restrictions that exist when issuing keys.  The parameter is called "Restrict key return by key cabinet and system (Premium edition only)"

### Orders

When searching for orders, the system "(All)" is now available, thereby allowing you to search for all orders for all systems that meet other conditions such as the order status.  When "(All)" is selected, other functions such as key selection or adding an order are not available.

### Version 7.14101.0.0

### Keys On Issue Export

Added 4 columns, Email1...Email4 to contain the first 4 email addresses in the Email column when multiple email addresses have been entered for a key holder (semi-colon separated).

### Data Interface

Premium edition only, added a new feature to the data interface service to export keys on issue data every 24 hours.

### Version 7.14001.0.0

### Key issue email - key bunches

Fixed an issue where under some circumstances the email notification would not be generated when issuing multiple key bunches.

**Version 7.13401.0.0**

**Customer specific changes**

Customer specific changes.

**Data Interface**

Premium edition only.

Fixed an issue in the data import service which stopped signatory updates being imported.

**Version 7.13201.1.0**

**Internal changes**

Internal changes for future compatibility issues.

**Version 7.13101.0.0**

**Customer specific changes**

Customer specific changes.

**Key cabinet**

Improved the "Is not deleted" search to also exclude disabled keys.

**Version 7.13001.1.0**

**Key cabinets**

Premium edition only, allowed key cabinets to be removed when lost or broken key issues are in that cabinet. After the key cabinet removal, the lost or broken key issues are not in a cabinet.

Premium edition only, added the ability to move lost keys into a key cabinet. This is necessary only if you have a lost key that is not in a cabinet and you have found the key (if the key is not in a key cabinet then it is not allowed to be found).

**Version 7.12901.3.0**

**Deposits and lost key fees**

Premium edition only, support for key deposits and lost key fees.

**Key pre-issue email**

Added ability to generate emails to key holders to advise of pending key issue.

**Version 7.12802.0.0**

**Door search**

Fixed an anomaly regarding the selection of door area.

**Version 7.12801.3.0**

**Customer specific changes**

Customer specific changes.

**Data Interface**

Premium edition only, data import service.

**Version 7.12702.0.0**

**Key issue email**

Added a merge field [DOOR_LIST] that may be used in key issue and key reissue email messages. The field produces a list of doors that the issued keys or key bunches operate.

**Door area**

Change the door area search field to allow entry of text as well as selecting from the list.

## Version 7.12701.2.0

**Security hardening**

Internal changes for hardening of user security.

**System import**

Resolved an error that may on rare occasions stop multiple systems from being imported in a single operation when the systems are from more than one locksmith. The condition would on rare occasions stop a system from being imported but caused no harm and the system from the second locksmith could be imported separately.

**Key Cabinet**

Performance improvements on large systems.

## Version 7.12601.0.0

**Internal changes**

Internal changes for future compatibility issues.

**Customer specific changes**

Customer specific changes.

## Version 7.11801.0.0

**Key Holder report**

Added an option to show the key holder address.

## Version 7.11302.0.0

**Translation**

Messages changes for translated versions.

## Version 7.11301.0.0

**Translation**

Messages changes for translated versions.

## Version 7.11201.0.0

**Key holders report**

Fixed an issue with some history information being omitted.

## Version 7.10901.4.0

**Internal changes**

Internal changes for future compatibility issues.

**Translation**

Messages changes for translated versions.

**Version 7.10801.0.0**

**Customer specific changes**

Customer specific changes.

**Version 7.10503.0.0**

**Key holder documents**

Added the capability to store documents against key holders.  This is accessible from the key holders window and also while issuing and returning keys.

**Version 7.10501.2.0**

**Windows versions**

Added support for Windows 10.

Dropped support for Windows XP and Windows Server 2003.  ProMaster Key Manager will continue to operate on these retired operating systems for some time but are not officially supported.

Added an email notify option within the backup program.

**Version 7.10401.0.0**

**System import**

Recorded the time-stamp of the file being imported, then on subsequent imports warn if an older file from your locksmith is being imported.

**Version 7.10101.0.0**

**System import**

Altered the way the import works regarding key and door notes and added an option to preserve user entered notes.

**Version 7.10001.0.0**

**Appearance**

Updated the application appearance to a cleaner crisper look.

**Version 7.9802.0.0**

**Keying matrix report, Doors report with keys**

When reporting by a selection of keys, fixed selection of keys included to be that of all keys operating the selected doors rather than just those used for the selection.

**Version 7.9801.0.0**

**Key data CSV export**

Added columns to the export for lost/broken time and lost/broken key holder.

**Version 7.9601.0.0**

**Key holders**

When adding key holders, the company name may be picked from a drop down list of company names used previously.

**Version 7.9502.0.0**

**Doors CSV export**

Added a column to the csv export that shows the number of issues of the lock.  Not meaningful for normal locks but use for doors that represent padlocks or cabinet locks that may have been ordered and manufactured multiple times.

**Version 7.9501.0.0**

**Keying matrix report**

Fixed some error messages when reporting by a selection of keys or key holders.

**Version 7.9201.0.0**

**Key orders**

Fixed a problem where some signatory names were being truncated on the printout.

**Key holders**

Fixed a problem on some scanners when scanning a photo of the key holder.

**Key hierarchy**

Added an option to print the key description as well as the key number.

**Version 7.9102.0.0**

**Key holders CSV import**

Fixed an issue when updating key holder information from a CSV file when the employee number was treated as the primary key.

**Version 7.9101.0.0**

**Key cabinets**

Improved the wizard for moving keys into a key cabinet.  Now you may select and deselect individual key issues after the list that will be moved is generated and displayed.

**Version 7.8701.0.0**

**Translation**

Messages changes for translated versions.

**Version 7.8201.0.0**

**Translation**

Various minor layout issues addressed for translated versions.

**Version 7.8002.0.0**

**Licensing**

Premium edition - worked around a problem with a Windows anomaly.

**Version 7.8001.1.0**

**Licensing**

Improved Premium edition licensing engine to be more tolerant of changing user licenses in busy installations.

**Version 7.7901.0.0**

**Keys report**

Resolved an issue where the keys report with key holders and without history could show additional data about returned keys if other key holder data med certain conditions.

### Version 7.7601.0.0

**Keying matrix**

Fixed an error message that sometimes appeared when saving changes.

### Version 7.7401.0.0

**Documentation changes**

Various documentation improvements.

### Version 7.7302.0.0

**Internal changes**

Internal changes for future compatibility issues.

### Version 7.7301.0.0

**Reissuing Keys Email**

Fixed an incorrect message in the email subject.

**Custom Release Specific**

Fixed an error when emailing an order in the Omega custom release.

### Version 7.7201.0.0

**Importing From ProMaster Master Keying**

Added optimisations that dramatically improve the system import time when huge systems are imported from ProMaster Master Keying for the first time after upgrading from ProMaster Key Manager version 4 or 5 to ProMaster Key Manager version 7.

### Version 7.7102.0.0

**Key Issues**

Added the ability to store the name of a person who authorised a key to be issued.

### Version 7.7101.0.0

**Doors Report**

Fixed an issue when multiple systems exist that showed door areas in the selection list for only the last selected system.  Now all door areas are displayed.

### Version 7.7002.1.0

**Windows 8**

Added support for Windows 8.

### Version 7.7001.0.0

**Company Name**

Extended the maximum length of registered company name.

### Version 7.6901.0.0

**Found Lost Keys**

Fixed an error message when attempting to select multiple lost keys.

**Key Issue Searching**

Remember the state of the "Include Deleted" option so it reverts to your last selected choice.

### Version 7.6802.0.0

**Signature Pad**

Fixed an issue with Topaz signature pads.

### Version 7.6801.0.0

**Exports**

For keys on issue, added the name of the issuing person to the exports.

### Version 7.6701.0.0

**Keying Matrix**

Reduced memory usage when viewing the keying matrix for large locksmith systems.  Fixed some related error messages that sometimes appeared.

### Version 7.6601.0.0

**Export Data For All Key Issues**

Added key holder category and separate fields for first and last names to the data in this export (previously had full name of key holder only)

### Version 7.6401.0.0

**Entering Keys**

Fixed an anomaly with selecting the 'key above' when entering your own systems.

**Key Hierarchy**

Visual adjustments and ability to resize columns.

### Version 7.6301.1.0

**Internal Changes**

Internal changes for future compatibility issues.

**Visual Changes**

Fixed several minor visual anomalies.

### Version 7.6202.0.0

**Orders**

Fixed a problem which resulted in an error message that could occur when saving orders.

### Version 7.6201.0.0

**Installation**

Small change to the installation process to support some corporate environments.

### Version 7.6001.1.0

**Export Keys On Issue**

Added separate fields for first and last names (previously had full name of key holder only) to the data in this export is able to be used for importing key holders into another database.

**Returning Keys**

Allowed deleted keys to be selected when returning keys.

**Import Key Issue Holdings**

Added an admin function to import key issue holdings from a CSV file.  This allows customers with multiple databases to merge their data into a single database.  Contact WH Software Limited if you require guidance as this is not a simple process.

**Version 7.5901.0.0**

**Upgrade From ProMaster Key Manager Version 5**

Fixed another issue that blocked a key manager 5 database from being upgraded with some non-English characters.

**Version 7.5801.3.0**

**Emailing Job**

Fixed an error caused by MAPI mail on Windows 7 where the Outlook message gets stuck behind ProMaster Key Manager.

**Orders**

When an order is released for a locksmith maintained system and electronic order authorisation is turned on, you are now prompted to authorise the order.

**Lost And Broken Keys**

Improved the behaviour when selecting multiple keys to make it consistent with other areas of the program where multiple selections can be made.

**Lost And Broken Keys**

Improved the ability to mark deleted or disabled keys as broken through the lost and broken keys wizard. Previously deleted keys needed to be lost or broken one at a time.

**Import From Locksmith**

Fixed an error when importing systems from a locksmith on some lock system types.  The error related to key head colours.

**Lost And Broken Keys**

Changed the default search status when recording lost and broken keys from "Hook or Issued".

**Store Scanned Key Responsibility Acceptance**

Added the capability to scan and store a signed key issue responsibility acceptance form subsequent to issuing keys.  Previously the scanning the document immediately after issuing keys was the only option.  Premium only.

**Key Issues**

Added the ability do get details about a lost or broken key to see when the event occurred and who authorised it.

**Import From Locksmith**

Fixed a problem relating to importing the Key Above information.

**Version 7.5705.0.0**

**Key Head Colours**

Fixed an error message related to key head colours that contained non-English characters.

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**Version 7.5704.0.0**

**Lost And Broken Keys Report**

Added options to show the lost/broken date on the report and to run the report for a specified date range. Altered the page layout to fit more keys per page.

**Version 7.5703.0.0**

**Upgrade From ProMaster Key Manager Version 5**

Fixed an issue that blocked a key manager 5 database from being upgraded with some non-English characters.

**Version 7.5702.0.0**

**Delete Key Bunch**

Fixed an issue that stopped key bunches from being removed.

**Version 7.5701.0.0**

**Delete System**

Some systems were unable to be deleted.  Fixed.

**Version 7.5601.0.0**

**Key Holders**

The search for key holders when search by "Company name containing" was incorrect.  Fixed.

**Lost And Broken Keys**

Changed the default search status when recording lost and broken keys from "Hook" to "Issued" and there is a much greater probability that a lost or broken keys is on issue rather than being in your key cabinet.

**Version 7.5501.0.0**

**Company Information**

Fixed an issue that stopped company information from being saved sometimes.

**Version 7.5402.0.0**

**Bunches**

Fixed an issue related to duplicate keys in a bunch.

**System Import**

Improved the progress display when importing large systems so that does not position itself over other applications.

**Issue And Return Keys**

Added options on the issue, return, reissue and return and issue key wizards to allow the wizard to run again automatically.  This will benefit organisations that batch process key activity.

**Key Bunches Report**

Added a report to list all key bunches.

**Version 7.5401.0.0**

**Scheduled Backups**

Fixed an issue stopped scheduled backups from starting sometimes.

**Version 7.5202.0.0**

**Upgrade From ProMaster Key Manager Version 5**

Fixed an issue that blocked a key manager 5 database from being upgraded if it had not been keep up to date with ProMaster Key Manager Version 5 updates.

**Version 7.5201.0.0**

**Key Issue Activity Report**

Resolved an issue where date range was not respected when reporting on all systems.

**Version 7.5102.0.0**

Initial release of ProMaster Key Manager 7.