

ProMaster Key Manager

by WH Software Limited

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About

Part



1

1 About

Welcome to ProMaster Key Manager version 8 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.

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

2

2 Copyright notice

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Although WH Software Limited has used its best efforts to eliminate inaccuracies from this user guide, it could contain technical inaccuracies and typographical errors. Changes made from time to time to the information contained in this user guide will be incorporated in later editions of this user guide.

Product manufacturers do not authorise the information contained in ProMaster Key Manager. Manufacturer names are used for identification purposes only.

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

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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 system requirements
- The installer and users are familiar with and confident using Microsoft Windows
- The installer has administrator access on the computers where the installation is to be performed

4.2 Understanding concepts

This topic is a reference for a number of concepts and terminologies used in ProMaster Key Manager, gathered into one place for reference. References are made to the topics that relate to each item here.

Concepts related to installation

Premium edition: Server computer

The server computer is where everything is installed. The parts needed by the server, the parts needed by the client, and the database.

If you are operating on a single computer then your computer plays the roll of the server and client.

See [System requirements](#)¹² for hardware requirements.

Premium edition: Workstation computer

If you are in multi-computer environment, one computer (Hopefully one with good quality hardware, UPS, backup solutions and fast SSD storage) is the server (see above).

Every computer where a user sits to operate ProMaster Key Manager is a client computer or workstation.

See [System requirements](#)¹² for hardware requirements, and [Architecture overview](#)¹² for more about the architecture.

Database

The database is the most important file used by ProMaster Key Manager. Generally it is called KM8.fdb.

If you lost everything, but still have this file then you are in a happy place. Ok, you may need some help reinstalling and reconfiguring ProMaster Key Manager, but that is all easy stuff.

In the topic [Backing up your data](#)²⁸ we give plenty of advice about backing up. Please take this seriously.

Concepts related to using ProMaster Key Manager

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 granted 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. See [Systems](#)⁵⁶.

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.

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 8 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 8 to maintain a master key system for you. It may be a lock manufacturer or a locksmith. See [Your locksmith](#)⁵⁴

Signatory

A person associated with a system who has the authority to authorise new keys to be ordered. See [Signatories](#)⁵⁹

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. See [Keys](#)⁶²

Door

Any locking product that is opened by keys in the system, be it a real door or a padlock. See [Doors](#)⁶⁹

Keying

The relationship between doors and keys. See [Keying matrix](#)⁷⁵

Order

A request for keys to be manufactured. When the keys are manufactured you then have more key issues. See [Orders](#)⁸⁰

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 edition: Multiple key cabinets may be created to represent multiple real key cabinets. See [Key cabinets](#)⁴¹

Key holder

A person to whom you issue keys. See [Key holders](#)⁹²

Issue key

The process of giving a key issue (or key bunch) to a key holder. See [Issue keys and key bunches](#)⁹⁵

Return key

The process of receiving back a key issue (or key bunch) from a key holder. See [Return keys and key bunches](#)⁹⁸

Concepts related to terminology

System number

The system number is the system identifier. The system number is a unique value in your database.

Key number

The key number is the key identifier. The key number is unique within each system.

Door number

The door number is the door identifier. The door number is unique within each system.

Door stamping

The door stamping is the information that is marked on the cylinder.

4.3 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 see references to Premium and Basic to identify functionality and requirements specific to each edition.

Installing

Part



5

5 Installing

This section describes the architecture of ProMaster Key Manager, and the installation options available. It describes the installation process and components that are installed onto your computer.

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 ProMaster Key Manager 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 30650 and TCP port 30651.

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

The product 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 8.1	Windows 2019

	Windows 10 Windows 11 Windows 2012/2012 R2 Windows 2016 Windows 2019 Windows 2022	Servers should use a server operating system
CPU	Core i5, 2 cores minimum	Core i7 or XEON
RAM (available)	2GB	
Hard disk drive space	200MB	According to the size of your database and sufficient space to leave 14 days backup on the server.
Mouse or other pointing device		
Display	1680 x 1050 24 bit colour	

The minimum workstation computer hardware requirements are:

Requirement	Minimum	Preferred minimum
Windows version	Windows 8.1 Windows 10 Windows 11	Windows 10
CPU	Core i5, 2 cores minimum	Core i7
RAM (available)	1GB	
Hard disk drive space	100MB	
Mouse or other pointing device		
Display	1680 x 1050 24 bit colour	1920 x 1200 32 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 8.1 Windows 10 Windows 11	Windows 10
CPU	Core i5, 2 cores minimum	Core i7
RAM (available)	2GB	4GB
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	1680 x 1050 24 bit colour	1920 x 1200 32 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.

On versions of Windows prior to Windows 10, to achieve correct presentation you must use 100% font size in your display settings. On Windows 10 the font size may be set larger (125% or 150% for example) and ProMaster Key Manager will display correctly. On Windows 10 you may benefit from changing the compatibility settings for "High DPI scaling override" to "System (Enhanced)".

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.

If you are on a PC without a network connection (i.e. No LAN and no WIFI) then you will need to ensure that TCP/IP is available despite not having a network connection. This is because the database connection uses TCP/IP.

On Windows 10, this is how you install a loop-back adaptor, however you must seek professional advice before making any such change as it is not something that WH Software Limited can help you with.

- (a) Run "Device Manager"
- (b) Select the computer node at the top
- (c) From the "Action" menu choose "Add legacy hardware"
- (d) Click Next
- (e) Choose "Install the hardware that I manually select", Click Next
- (f) Choose "Network adaptors", Click Next
- (g) On the left list, choose "Microsoft"
- (h) On the right list, choose "Microsoft KM-Test Loopback Adaptor", Click Next, Next, Finish

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 30650 and port 30651.

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

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 in a network environment, always install the server first.

Starting ProMaster Key Manager setup

- Start your computer and log in.

- Run the setup program **KM8Setup.exe**
- Follow the instructions that appear.

Upgrading from ProMaster Key Manager 7, 5

During the setup you are asked if you are performing a new installation or if you are upgrading from ProMaster Key Manager 7 or 5.

Later in the installation, the ProMaster Key Manager Database Creator is launched.

For an upgrade it requires you to select the database file(s) from your previous version that will be upgraded.

The old database files are not modified. If you select a database, it is copied before it is read. If you select a database upgrade, it is restored to a temporary file before it is read. After a temporary copy of the database file to upgrade is made, that temporary copy may be modified, then the data is read from it and pumped into a new ProMaster Key Manager database. On completion the temporary files are removed.

Make sure you are not running tight on disk space - this needs about 3 times more space than that used by the old database(s).

Be aware that the upgrade process will take a long time for a large database so plan around this.

New data, new user permissions

User permissions are created on groups, not individual users. The best way is to not create security groups for each user (this is a choice during the upgrade) but to do it yourself after upgrade. Regardless of your choice, there are many new permissions in ProMaster Key Manager 8 that do not map to permissions in previous versions because tasks previously performed by the "admin" user are now performed by users according to their permissions.

Upgrading from ProMaster Key Manager 4, 3, 2

There is no automatic process to upgrade from ProMaster Key Manager 4, 3 or 2.

This is a lengthy multi-step process and requires assistance from WH Software Limited.

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 (32 bit or 64 bit) that you are running. Paths shown here are for 64 bit Windows.

This topic describes the default locations.

For purposes of this illustration the following assumptions are made:

- The standard 64 bit Windows locations are being used and that you are running an English language version of Windows.

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 (x86)\WH Software\KM8 (and various sub folders)
Shared settings, settings used by background processes, logs created by	All	C:\ProgramData\WH Software\KM8

system and background processes		
User specific settings, user data cache, logs created by user processes, user dictionaries	All	C:\Users\ <user>\AppData\Local\WH Software\KM8 Where <user> is the user name you have use to log into Windows.</user>
Database	Premium: Server Basic: Workstation	C:\ProgramData\WH Software\KM8\Database
Database engine	Premium: Server Basic: Workstation	C:\Program Files (x86)\WH Software\KM8\FB3
Database client connectivity	Premium: Workstation Basic: Workstation	C:\Program Files (x86)\WH Software\KM8\FB3

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](#)¹⁵ for an overview of folder locations and differences between folder location on various versions of Windows.

Location: C:\Program Files (x86)\WH Software\KM8\Bin

File	Description
KM8.exe	The main application file for ProMaster Key Manager
KM8Back.exe	Database backup program
KM8Upg.exe	Application upgrade helper

Location C:\ProgramData\WH Software\KM8\Database

File	Description
KM8.fdb	ProMaster Key Manager database

Location: C:\ProgramData\WH Software\KM8

File	Description	Notes
KM8.ini	Application settings shared by all users and application settings for background processes (KM8Back)	This is where the database connections are configured. Other than configuring database connections, there should be no need to edit this file manually.
Log\KM8Back.log	Log file created when a database backup is run in "auto" mode.	Server only.

Location: C:\Users\\AppData\Local\WH Software\KM8

File	Description	Notes
KM8.ini	Application settings specific to this user	All settings are configurable in KM8 so this file should not be edited manually.

Log\KM8.log	Log file created when this user performs a database upgrade.	This operation should only be performed on the server, so the only place this file should be created is on your server.
Log\KM8Back.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 Spell\SuggestionLearn.adl Spell\Autocorrect.adl	Custom spelling settings	

5.6 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.

Premium: 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 admin user 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

Getting started

Part

6

6 Getting started

6.1 Logging into 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 than one ProMaster Key Manager installation (it is normal to have only one choice for the environment)

6.2 The administrator's first time

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

1. Log in as **admin**. You will know the password, you created it during the installation process.
2. Enter your registration information.
3. Go to users and security groups and get that stuff configured as you want. See [Users](#)⁴² and [Security groups](#)⁴³.
4. Log out and log in as a normal user.
5. Perform the product activation. See [Activating ProMaster Key Manager](#)²⁰.

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

[Company information](#)³²

[Logo for reports](#)³²

[Application parameters](#)³³

[Key holder categories](#)³⁶

[Security groups](#)⁴³

[Users](#)⁴²

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](#)²⁰

See [Setting your preferences](#)²¹ for help configuring ProMaster Key Manager to behave the way you work.

See [Printer setup](#)²³ to decide where your reports will be sent.

6.4 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.

6.5 Changing your password

If your user account is configured to integrate with Windows or Active Directory security then passwords are not controlled by ProMaster Key Manager and this topic is not applicable to you.

At any time after logging in, the user may change their password.

Getting started

- You must be logged in.
- From the **USER SETTINGS** menu, choose **Change password**.

Making a change

You must enter your old password then enter your new password twice.

6.6 Setting your preferences

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

Getting started

- You must be logged in.
- From the **USER SETTINGS** menu, choose **Preferences**.

An explanation of the preferences

Key holders

Choose how you want key holders sorted.

Overdue keys

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.

Keying matrix

You can adjust the mouse sensitivity for the Keying Matrix if you are entering your own systems.

Keys

The DHI setting makes ProMaster Key Manager follow DHI (North America) numbering convention for keys when entering your own systems.

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

Premium: 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.

System updates

Turn this option on if you are using the publishing service to transfer system updates from your locksmith and want ProMaster Key Manager to check automatically for available updates. If updates are available you will be notified by a banner at the bottom of the main window. You can then choose to download and install the updates. Note that the updates are **not** downloaded and installed automatically or without your decision to do so.

Program updates

Turn this option on if you want ProMaster Key Manager to periodical check for and notify you of program updates.

If you use a proxy server to access the internet, enter the proxy server name or IP address and the proxy server port number. Leave these values blank if you do not use a proxy server.

Auto find

Various areas in ProMaster Key Manager allow you to search for information. When each of these search windows are 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, it 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.

The capabilities of email vary depending on the delivery method.

MAPI: Email is always sent as plain text. Any content from key holder categories will be converted to plain text for sending and images, tables and other complex elements will be lost.

Outlook: Email is always sent as HTML text, preserving fonts, colours, images etc.

SMTP: Either plain text or HTML depending on the setting "Send email as HTML instead of plain text".

The MAPI option sends email using your windows default MAPI mail client. To use this you must have a mail application installed correctly and configured as the MAPI client.

The Outlook option automates Outlook to send the email. You must have the 32bit version of Outlook installed.

The SMTP option sends the mail message direct to a mail server and several settings are required - see below.

Normally when Outlook is used, an add-in called "Outlook Security Manager" is used to make Outlook more cooperative. You can disable use of the Outlook Security Manager if it is problematic.

Email - SMTP settings

You may need to check with your mail administrator for the settings, and as there is a variety of mail servers in use, each with different characteristics, you may need to experiment a bit to get it right.

Option	Description
SMTP server	The name or IP address of your mail server.
Port	The port on your mail server that receives the email.
SMTP login name	If your mail server uses login based authentication, enter your mail login name.

SMTP password	If your mail server uses login based authentication, enter your mail login password.
Encryption	Choose if you use an unencrypted mail connection and how the encryption works.
Sender's name	The name of the person to appear as the sender.
Sender's email	The email address of the person to appear as the sender. Some mail servers require the sender email to be the same as the SMTP login name if SMTP login name is used.
CC email to	If you put an email address in this field, it will be added as a CC recipient to each email message. This is useful for including yourself as a recipient.
Read receipt email	If you put an email address in this field, the email message will be flagged as requesting a read receipt and using this email address (usually your own) as the receipt recipient.
Send email as HTML instead of plain text	Chooses if the email message is delivered in HTML format or plain text. Unless you have issues sending HTML email, it is a better option.
Send test message	Sends a test message using the current settings. Useful for testing before saving.

Email - SMTP settings - notes about Office 365

If you are using Office 365 as your mail provider, you will need to have it configured to provide the SMTP capability, and there are a number of settings you will need to get correct.

If you choose not to use encryption, Office 365 will need to be configured to use your external IP address as an authorised sender. In this case, the port is likely to be 25. This is not the preferred way to send to Office 365.

If you use encryption, the SMTP server is smtp.office365.com, the port is 587 and the encryption is StartTLS. This is the normal way to do it for Office 365.

Regardless of what you put in the sender's name and email address, Office 365 may override this with the name associated with the "SMTP login name".

A word of warning about Office 365 SMTP. It is slow sending. Very slow. When very large messages take a long time to send, or sometimes fail, this is outside of our control. It has been slowed down deliberately by Microsoft. That said, unless your messages are huge you may never notice a problem

Report stretching

For each type of information on reports, a pre-determined width is allocated. This gives the best balance between the various pieces of information shown. If the information cannot fit in the allocated space, in most places it will automatically stretch down the report. You may use these options to determine for each type of data if it will be allowed to stretch on the reports. If stretching is disabled for a type of data and it is not able to fit then it will be truncated on the report. Generally some types of data (e.g. System number, Door number, Lock part code) should always be allowed to stretch as truncating them makes little sense, while other types would be ok to truncate.

6.7 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 **USER SETTINGS** menu, choose **Printers**.

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 keying matrix report using large format.

Label printer

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

6.8 Spelling preferences

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

Getting started

- You must be logged in.

From the **USER SETTINGS** menu, choose **Spelling**.

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.

6.9 Navigating and usage tips

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 **Keys**, you could do this in any of the following ways:

- Click your mouse on the menu **SYSTEM** then on the button **Keys**

Or

- Using your keyboard press **Alt-S** for the **SYSTEM** menu then click on the button **Keys**

Or

- Press **Ctrl-K** because that is the short cut key to perform the Keys 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

Check 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 to 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.

Convert case

Various data entry fields support the key press **Shift-F3** that cycles case between lower-case, upper-case and title-case. This works on the whole entry if nothing is selected, or just the selected text if you have made a selection.

6.10 Searching for data

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.)


Search field modifier


After many search fields there is a modifier to control how the search is performed. It is indicated by a small graphic after the search field and the options on any particular search field may be cycled through by clicking on the image. The option for each field is enabled when the field contains something to search for, and your setting for each search modifier is remembered for future searches.

Here are the 4 search modifiers and a description:

 Search starting. The search on the field matches data that starts with the value you entered.

 Search containing. The search on the field matches data that contains with the value you entered, but not necessarily at the start.

 Search exact match. The search on the field matches data that exactly matches the value you entered.

 Search all values. The search on the field must contain each of the words you entered. The words must all exist in the matched value, but may appear in any order.

Notes

- All search parameters you enter 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.
- See [Setting your preferences](#)²¹ for information about auto find.

Administering ProMaster Key Manager

Part

7

7 Administering ProMaster Key Manager

This section covers topics related to administering ProMaster Key Manager, but not when using it for day-to-day operations. Some of the items described are specific to the **admin** user, but many items are applicable to users with appropriate permissions to perform the tasks. The topics are separated from those in [Using ProMaster Key Manager](#)¹⁵⁴, which relate to day-to-day operations.

7.1 Database upgrades and backup

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 (KM8Update.exe) that installs a new version of the ProMaster Key Manager program and any necessary support files.

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 separate media 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 smarter than a simple file copy. A backup created with ProMaster Key Manager backup program may be produced 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 using a third party backup solution.

The ProMaster Key Manager backup program does another task that is vitally important to the health of the database while the backup is running. It is responsible for "garbage collection" in the database which eliminates old unnecessary data and therefore controls database performance and bloat. It is responsible also for recalculating index quality which is vital for maintained performance.

WARNING: Live backups made with ShadowProtect or similar when the database is in use are of limited use. The reason why is that they make a point in time snapshot of the database, but do not capture a read-consistent view of the data. If a backup made with ShadowProtect or similar is restored, there is a very good chance that it will be corrupt, and look to the database engine very much like someone pulled the power cord out of the wall. Consider this to be a expensive exercise to repair the database. **ALWAYS** run the ProMaster Key Manager backup program. The backup files produced by the ProMaster Key Manager backup can be captured safely by ShadowProtect etc.

Producing Backups

To produce a backup:

- Click the **Backup** button.
- Select the **Database to backup** (most likely you have only the database called Default)
- Alter the destination **Folder** if you wish. You may choose to have the backup copied to a second folder. The backup folder must be a local drive on the server. The second folder is accessed by the backup program rather than the database engine, and may be located on a network share.
- Click the **Save settings and run backup** 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.

Backups can be configured to automatically zip the **FBK** file into a **ZIP** file. This is achieved by turning on the **Compress the 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. Failure to do this may result in an unusable zip file. Unless disk space is critically low, it is not recommended to use this option as it makes backups significantly slower and the backup file must be extracted in the event that it is to be restored.

The **Output additional progress and diagnostic messages** 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.

Copy the backup to somewhere else

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 separate media. 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.

To restore a backup:

- Click the **Restore** button.
- Click the **Select** button, and select the backup file (the FBK file). If you zipped the backup, you must first extract the backup file from the zip archive (using WinZip or similar).
- Select the destination **Database to restore** (most likely you have only the environment called Default)

- Click the **Save settings and run restore** button.

The **Output additional progress and diagnostic messages** 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.

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

To configure automatic backups:

- Click the **Settings** button.
- Tick the **Database environment(s)** to be backed up.
- Click the **Select folder** button to choose the destination folder for the backups. This must be on a local disk.
- If you wish, check the option **After the backup is created, copy it to the folder below** and click the corresponding **Select folder** button to choose the destination folder copy the backup to. 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.
- There is one additional option for the auto backup - **Recalculate index selectivity**. This option should be left on as it is responsible for maintaining database optimisation. It adds a small amount of time to the backup.
- Choose how long you want to keep backups. There are separate settings for the backup folder and the "copy to" folder. It is highly recommended that you keep a reasonable number of backups, perhaps 14 days. If you don't have enough disk space, get more.

Email

If you want an email notification after the scheduled backup has run, use the settings on the Email tab.

You may need to check with your mail administrator for the settings, and as there is a variety of mail servers in use, each with different characteristics, you may need to experiment a bit to get it right.

Option	Description
Server	The name or IP address of your mail server.
Port	The port on your mail server that receives the email.
Login name	If your mail server uses login based authentication, enter your mail login name.
Password	If your mail server uses login based authentication, enter your mail login password.
Encryption	Choose if you use an unencrypted mail connection and how the encryption works.
Sender's name	The name of the person to appear as the sender.
Sender's email	The email address of the person to appear as the sender. Some mail servers require the sender email to be the same as the SMTP login name

	if SMTP login name is used.
Sent to	Put in the email recipients, one per line.
Test	Sends a test message using the current settings. Useful for testing before saving.

Email - notes about Office 365

If you are using Office 365 as your mail provider, you will need to have it configured to provide the SMTP capability, and there are a number of settings you will need to get correct.

If you choose not to use encryption, Office 365 will need to be configured to use your external IP address as an authorised sender. In this case, the port is likely to be 25. This is not the preferred way to send to Office 365.

If you use encryption, the SMTP server is smtp.office365.com, the port is 587 and the encryption is StartTLS. This is the normal way to do it for Office 365.

Regardless of what you put in the sender's name and email address, Office 365 may override this with the name associated with the "Login name".

Run

If you want to run a program after the backup completes, turn on the "Run" option and select the program to run.

The name of the file created from the backup (fbk or zip) is passed to the program as the first parameter.

Schedule

- If you want to configure **Windows Scheduled Tasks** to start your backup each night, click the button **Schedule Auto Backup...**
- If you want to add the scheduled task yourself, the command to run is shown in the yellow area at the bottom of the settings.
- 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 **KM8Back.exe** to run at a time of your bidding. If you do that, be sure to start **KM8Back.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 external media for safe keeping.

SCHEDULED TASK USER ACCOUNT

It is strongly recommended that you create a Windows user specifically for running the backup and use that user for no other purpose. The user will need to have permissions to log on to run a batch job, and will need permissions to the folders where the backup files are produced (including delete permissions so old backups can be removed). If you do this, make sure the account password is secure and never expires. It is all too common for users to configure scheduled tasks with an account, such as their own login then at some time in the future change their password. After that the backups will not run as scheduled task no longer has permissions to run.

Security

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

Always test your scheduled backup by opening your Windows Scheduled Tasks and choosing to run the task immediately and verify that the backup files are produced. Check the task options to ensure that they make sense and that the task will run even if a user is not logged in.

7.2 Configuring

7.2.1 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

- From the **SETTINGS** menu, select **Company information**

Editing company information

- Enter an address, contact name, email, telephone and fax numbers.
- Click **OK** to save.

7.2.2 Logo for reports

You may include a small graphic in the top left corner of reports, or replace the entire company portion of report headers with a full width logo.

Getting started

- From the **SETTINGS** menu, select **Logo for reports**
- Choose the **Standard Image** tab for small graphic in the top left corner of reports or the **Full Width Image** tab for the logo that replaces the entire company portion of report headers.

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 small logo is rendered on the reports in a 25mm x 25mm square.
- The full width logo is rendered on the report 190mm wide for portrait reports and 277mm wide for landscape reports.
- Because the small 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.
- Change the [Application parameters](#)³³ **Report header style** under **Reports** to specify no logo, small log or full width logo.

Making your graphics file excessively 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.

7.2.3 Application parameters

Application Parameters define some program behavioural characteristics that are set by the **admin** user or a user with the permission **Setup application parameters** and are common to all users.

See [Description of application parameters](#)³³ for information about each parameter.

Getting started

- From the **SETUP** menu, select **Application parameters**
- Expand or collapse branches of the tree by clicking on the [**>**] button beside the folders.
- **Double click** the item that you want to change (or click **Edit**), make your change and click **OK**.

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.
- To reset an item to the default value, choose **Remove**.
- 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**.

7.2.3.1 Description of application parameters

Parameter	Location	Editio n	Description
Length of confirmation prompts for critical delete operations	Application	All	

Minutes after last use to lock console	Application	All	The amount of time of no activity after which ProMaster Key Manager will log you out if possible, or if not possible then the program is locked requiring you to enter your password to continue. Set this to 0 to disable the functionality.
Restrict key issue by key cabinet permitted for each key holder category	Application	Premium	Turns on restrictions between the key cabinet and key holder category to control the issue of keys. See Key holder category key cabinets ³⁹ .
Restrict the systems that each user may access	Application	Premium	Turns on restrictions between users and systems to control which users may access each system. See User systems ⁴⁵ .
Use electronic order authorisation	Application	All	Turns on order authentication. See Signatory authentication ⁴⁶ , Signatory authorisation ⁸³ .
Use fee recording	Application	Premium	Turns on the functionality to record key issue fees and lost/broken key fees. See Key holder categories ³⁶ , Issue keys and key bunches ⁹⁵ , Return keys and key bunches and issue to another key holder ⁹⁹ , Key issue responsibility acceptance ¹²³ , Key return confirmation ¹²⁴ , Lost key ⁸⁷ , Broken key ⁸⁸ , Report - Fees ¹²¹ .
Use packet for key issue	Application	Premium	Turns on packets during key issue. See Issue keys and key bunches ⁹⁵ , Finding issued keys by packet ⁸⁵ .
Use pre-issue keys email	Application	Premium	Turns on the functionality to pre-issue keys and notify the key holder by email. See Pre-issue keys email ¹⁰⁴ .
Use risk categories for evaluating lost key risk	Application	Premium	Turns on the functionality to record and evaluate the risk when keys are lost. See Entering keys ⁶³ , Report - Lost and broken keys ¹¹⁶ , Report - Compromised doors ¹¹⁷ .
Allow bunches to contain multiple issues of the same key	Bunches	All	Turns on the ability to have multiple key issues of the same key in a bunch. See Entering key bunches ⁸⁶ .
Default values for "Key holder document type" selection	Documents	All	A CSV list of document types that will be offered when adding a document for a key holder. See Key holder documents ⁹⁴ .
Default values for "System document type" selection	Documents	All	A CSV list of document types that will be offered when adding a document for a system. See Storing documents ⁷⁹ .
System document type for "Plan"	Documents	All	The document type that identifies a PDF building plan.

			See Documents ⁷⁹ , Report - Doors ¹⁰⁸ , Report Keying matrix ¹⁰⁹ .
Allow email notification to key holder when keys are issued	Issues	All	Turns on the functionality to send email messages to key holders when keys are issued, returned etc. See Key holder categories ³⁶ , Issue keys and key bunches ⁹⁵ .
Allow key issue time to be in the future	Issues	All	Allows the key issue time to be set in the future when issuing keys. See Issue keys and key bunches ⁹⁵ .
Restrict key return by key cabinet	Issues	Premium	Turns on the functionality to restrict user access to key cabinets when keys are being returned. The default behaviour is to restrict key cabinet access when issuing keys but not for returning keys.
Subject for email confirmation of overdue keys	Issues	All	The email subject used when sending an email message to a key holder about overdue keys. See Key holder categories ³⁶ , Overdue key issues ⁹¹ .
Subject for email confirmation of returned keys	Issues	All	The email subject used when sending an email message to a key holder about returned keys. See Key holder categories ³⁶ , Return keys and key bunches ⁹⁸ .
Subject for email notification of issued keys	Issues	All	The email subject used when sending an email message to a key holder about issued keys. See Key holder categories ³⁶ , Issue keys and key bunches ⁹⁵ .
Subject for email notification of reissued keys	Issues	All	The email subject used when sending an email message to a key holder about reissued keys. See Key holder categories ³⁶ , Reissue keys and key bunches ⁹⁶ .
Treat Employee No as the primary search field	Key Holders	All	Turns on the functionality to treat the employee number as a primary search field. When this is on the search screens are altered and also CSV key holder imports match on this field rather than the names and company name.
Subject for email notification of pre-issued keys	Pre-Issue Notification	Premium	The email subject used when sending an email message to a key holder about pre-issued keys. See Key holder categories ³⁶ , Pre-issue keys email ¹⁰⁴ .
Font Name for Company on reports	Reports\ Customisation	All	Allows you to choose a different font for the company name display on reports.
Message for footer of reports	Reports\ Customisation	All	Allows you to set a message that will appear in the footer of all reports.

	ion		
Allow reports to be cancelled while printing	Reports	All	Allows reports to be cancelled while they are printing.
Character encoding for PDF reports	Reports	All	Allows you to specify that PDF reports will use only ASCII. Not a good idea to do this as any non-ASCII characters will not be rendered correctly.
Paper Size	Reports	All	Allows you to choose your paper size A4 or Letter. You must get this correct.
Protect PDF files from alteration by using encryption	Reports	All	Normally PDF reports are protected from changes. If you want PDF reports to not be encrypted then you can turn this off.
Report header style	Reports	All	Determines how the report header will be rendered. See Logo for reports ³² .

7.2.4 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

- From the **SETTINGS** menu, select **Key holder categories**

Making a change

- Use the **Add**, **Remove** and **Edit** 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 button and making a selection from the drop-down menu.

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.
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 unless the key has a deposit recorded, then the deposit is not refunded and the lost key fee is not charged.
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 unless the key has a deposit recorded, then the deposit is not refunded and the broken key fee is not charged.
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 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 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.

Key issue text

This is the text that appears on a Key issue responsibility acceptance report when issuing keys.

Key return text

This is the text that appears on a Key return confirmation report when returning keys.

Email key issue text

This is the text used for the email message when an email is sent to the key holder when keys are issued. It may contain merge fields.

Email key return text

This is the text used for the email message when an email is sent to the key holder when keys are returned. It may contain merge fields.

Email overdue keys text

This is the text used for the email message when an email is sent to the key holder regarding overdue key issues. It may contain merge fields.

Email pre-issue keys text

This is the text used for the email message when an email is sent to the key holder when keys are pre-issued. It may contain merge fields. Premium edition only.

Merge fields

The four email text messages allow for merge functionality when the email message is generated.

The parameters for the merge appear in brackets. You may right click on the editor where you want the merge field and choose **Insert field** from the menu for a list of choices.

The following table shows the parameters available for each of the four purposes.

Merge variable	Replaced by	Used by
[Company_Name]	Your company name.	Issue, Return, Overdue, Pre-Issue
[Company_Postal_Address]	Your company postal address. See Company information ³² .	Issue, Return, Overdue, Pre-Issue
[Company_Physical_Address]	Your company physical address. See Company information ³² .	Issue, Return, Overdue, Pre-Issue
[Company_Contact_Name]	Your company contact name. See Company information ³² .	Issue, Return, Overdue, Pre-Issue
[Company_Phone]	Your company phone. See Company information ³² .	Issue, Return, Overdue, Pre-Issue
[Company_Email]	Your company email. See Company information ³² .	Issue, Return, Overdue, Pre-Issue
[User_Name]	The name of the user logged into ProMaster Key Manager	Issue, Return, Overdue, Pre-Issue
[Key_Holder_Name]	The key holder name.	Issue, Return, Overdue, Pre-Issue
[Key_Holder_Employee_Number]	The key holder employee number.	Issue, Return, Overdue, Pre-Issue
[Key_Holder_Company]	The key holder company name.	Issue, Return, Overdue, Pre-Issue
[Key_List]	A list of all keys and key bunches applicable to the operation	Issue, Return, Overdue, Pre-Issue
[Key_List2]	A list of all keys and key bunches applicable to the operation with additional information.	Overdue
[Packet]	The packet used when the keys are issued.	Issue
[Issue_Time]	The key issue time.	Issue
[Issue_Reason]	The key issue reason.	Issue
[Return_By_Time]	The time the keys are due to be returned.	Issue
[Door_List]	A list of all doors applicable operated by keys in the operation	Issue, Pre-Issue
[Deposit]	The deposit amount and reference. Premium edition only.	Issue
[Deposit_Reference]	The deposit reference. Premium edition only.	Issue
[Deposit_Per_Key]	The deposit amount per key. Premium edition only.	Issue
[Deposit_Total]	The total deposit amount. Premium edition only.	Issue

[Return_Time]	The time the keys were returned.	Return
[Return_Reason]	The key return reason.	Return
[Refund]	The refund amount, reference and details of the corresponding deposits. Premium edition only.	Return

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

7.2.4.1 Key holder category key cabinets

Premium edition only. If you have set the [Application parameter](#)³³ "Restrict key issue by key cabinet permitted for each key holder category" to "Yes", then this functionality will be available.

Once that parameter is turned on and you have key cabinets defined, key holder categories must be granted access to each key cabinet that is permitted before key holders may be issued keys.

Getting started

- From the **SETTINGS** menu, select **Key holder category key cabinets**

Making a change

- Place a check mark against all key holder categories who may be issued keys for each key cabinet.

Various functions are available from the menu to change more than one entry at a time, to undo changes to a key holder category or to a key cabinet and to filter the key holder categories and key cabinets that are displayed.

- Click **OK** to save.

7.2.5 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

- From the **SETTINGS** menu, select **Reasons**

Making a change

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

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

7.2.6 Authorisation 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

- From the **SETTINGS** menu, select **Authorisation names**

Making a change

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

7.2.7 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 FIY.

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

- From the **SETTINGS** menu, select **Key colours**

Making a change

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

Each colour name may appear only once.

Each time a colour is used on a key, 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 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 Edit to alter a colour, do so with the intention of fixing a spelling mistake or if applicable the **Short colour**, but not to completely change a colour.

Locksmith systems

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

Fixing duplicate colours

You may do a lovely job of setting up your colours, then one day you import a system from another locksmith who has defined the colours differently. ProMaster Key Manager does not have any magic linguistic powers, so it creates any colours required by the import rather than applying rules to detect misspelt colours. Now for example you have Yello and Yellow, and you really don't want the misspelt Yello. Here's what you do:

- Select the colour that is the erroneous duplicate.
- Click **Replace colour**.
- Select the correctly spelt colour from the list provided.
- Enter the confirmation requested, pausing to ensure you have selected the correct colour for the replacement.
- Click **OK** to apply the change. Everywhere that the replaced colour is used is changed to the replacement colour, then the replaced colour is removed.

This affects every key in every system using the replaced colour. If you do something stupid like replacing "red" with "yellow" there is no going back.

Replace colour is disabled when the colour is not used.

7.2.8 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. **Each user must be given access to a key cabinet in order that they can issue keys from that cabinet** (See [User key cabinets](#)⁴⁵). Each key issue not only has a hook, defining its place within the cabinet, but also a cabinet. After a key cabinet is created, any key that is not in a key cabinet is not able to be accessed by any user until put into a key cabinet.

To bulk move keys into a key cabinet see [Move keys into key cabinet](#)⁴¹.

Defining key cabinets then assigning them to users allows you to restrict the issues that each user can issue.

The [Application parameter](#)³³ **Restrict key return by key cabinet** determines if the return of keys is restricted by the key cabinet configuration.

Getting started

- From the **SETTINGS** menu, select **Key cabinets**

Making a change

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

Each key cabinet name may appear only once.

You may add a location and notes to each key cabinet if needed.

You can sort the key cabinets so they always display in your preferred order.

7.2.8.1 Move keys into key cabinet

Premium edition only.

After a key cabinet is created, any key issue that is not in a key cabinet is not able to be accessed by any user until put into a key cabinet.

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

Getting started

- From the **SETTINGS** menu, select the drop down below **Key cabinets** and choose **Move keys into key cabinet**.
- It is also available from the **ISSUES** menu then select the drop down below **Key cabinet** and choose **Move keys into key cabinet**.

Making a change

Current key cabinet

Choose the option for how key issues will be selected based on their current key cabinet (or not in a key cabinet)

System

You can choose a single system or all systems.

Lost and broken keys

You can choose how lost and broken keys are treated.

- Click **Next**

System selection

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

- Click **Next**

Key cabinet assignment

Set a new cabinet for the keys.

Keys that are ticked will be set to the new cabinet.

Right click on the list of keys to see options for bulk selecting and deselecting keys.

The new cabinet for each key is shown with a flag indicating when it is a change.

If you have several key cabinets that you are assigning to various keys you will need to make multiple selections to assign the new key cabinets.

- Click **Next**

A summary is shown.

Enter the confirmation requested.

Click **Finish** to save the changes.

7.3 Security

7.3.1 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 is not able to be removed (but can be made inactive).

Getting started

- From the **SECURITY** menu, select **Users**

Making a change

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

An explanation of the options

Enter the user's **first names** and **last name**. These appear in various places 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

Each user belongs to a security group. Security groups control the activities that a user can perform. See [Security groups](#)^[43], [User systems](#)^[45] and [User key cabinets](#)^[45] for more information.

7.3.2 Security groups

Security groups control the permissions, or what is allowed for each user. Each user belongs to a single security group. While it is possible to create separate security groups for each user, it is more manageable to create security groups around classes of user and use each security group for any applicable users.

The security group **All** is pre-defined and not editable. It has all permissions, so be sure to use it carefully!

Getting started

- From the **SECURITY** menu, select **Security groups**

Making a change

- Use the **Add**, **Remove** and **Edit** buttons to set up your security groups.

An explanation of the options

- Select the permissions that the members of the security group are allowed.

Permissions are grouped by program area (Setup, Admin etc).

Description of permissions

Note that in some situations, ProMaster Key Manager checks more than one permission and often in conjunction with application parameters and license options. Some tasks may be permitted by more than one permission and others may require a combination of permissions.

Permission	Description
Group: Setup	

Setup company and associated data	Allows setup of company information and company logo on reports. Allows the publishing service to be configured.
Setup users and user security	Allows setup of users, security groups and user restrictions (system and key cabinet)
Setup general administrative settings	Allows setup key colours.
Setup application parameters	Allows application parameters to be altered.
Convert locksmith systems to user maintained systems	Allows a system to be converted from a locksmith system to a stand alone system.
Group: Admin	
Setup key issue and return reasons	Allows setup of key issue and return reasons.
Setup key issue authorise names	Allows setup of key issue and return authorise names.
Setup key holder categories	Allows setup of key holder categories and key holder category/key cabinet restrictions.
Print admin reports	Allows printing of admin reports.
Design reports	Allows design of custom reports if you have this feature licensed.
Print custom admin reports	Allows printing of custom admin reports if you have this feature licensed.
Group: System	
Create and edit systems	Allows systems to be created, altered and associated data such as keys and doors to be altered.
Delete systems	Allows systems to be removed.
Import systems from locksmith	Allows systems to be imported from your locksmith.
Export system information to CSV files	Allows door, key and keying data to be exported to CSV file.
Create and edit system documents	Allows system documents to be added and edited.
Print documents when printing door reports	Allows documents to be printed when printing doors or keying matrix.
Create and edit signatories	Allows signatories to be created and altered.
Print system reports	Allows system reports to be printed (Doors, keys etc)
Print custom system reports	Allows printing of custom system reports if you have this feature licensed.
Group: Key issues	
Create and edit key holders	Allows key holders to be created and altered.
Order keys to be manufactured	Allows orders to be created.
Receive ordered keys	Allows orders to be received.
Issue keys to key holders	Allows keys to be issued to key holders.
Return keys from key holders	Allows keys to be returned from key holders.
Email key holders about overdue key issues	Allows emailing to key holders about overdue key issues.
Create and edit key bunches	Allows setup of key bunches.
Record lost keys	Allows keys to be recorded as lost.
Record broken keys	Allows keys to be recorded as broken.
Record lost keys that have been found	Allows keys to be recorded as found.
Record broken keys that were not broken	Allows keys to be recorded as un-broken.

Create and edit key cabinets	Allows setup of key cabinets.
Find and fix missing key issues	Allows access to fix key issue problems.
Bulk change key holders to inactive	Allows access to bulk change key holders to inactive.
Bulk delete inactive key holders	Allows access to bulk change remove inactive key holders.
Import key holders from CSV files	Allows key holders to be imported from a CSV file.
Import key issue holdings from CSV files	Allows key issue holdings to be imported from a CSV file.
Import key issue stamping from CSV files	Allows key issue stamping to be imported from a CSV file if you have this feature licensed.
Export key holder and key issue data to CSV files	Allows various key holder and key issue CSV exports.
Print key issue reports	Allows printing of key issue related reports.

7.3.3 User systems

Premium edition only. If you have set the [Application parameter](#)³³ "Restrict the systems that each user may access" to "Yes", then this functionality will be available.

Once that parameter is turned on, users must be granted access to each system that is permitted.

Getting started

- From the **SECURITY** menu, select **User systems**

Making a change

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

Various functions are available from the menu to change more than one entry at a time, to undo changes to a system or to a user and to filter the systems and users that are displayed.

- Click **OK** to save.

7.3.4 User key cabinets

Premium edition only. If you have defined key cabinets (See [Key cabinets](#)⁴¹), then you must use this functionality to assign key cabinet access to appropriate users.

Getting started

- From the **SECURITY** menu, select **User key cabinets**

Making a change

- Place a check mark against all users who may access each key cabinet.

Various functions are available from the menu to change more than one entry at a time, to undo changes to a key cabinet or to a user and to filter the key cabinets and users that are displayed.

- Click **OK** to save.

7.3.5 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](#)^{D33} "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

- From the **SECURITY** menu, select **Signature authentication**

Making a change

- Select the signatory you want to configure.
- Click the **Edit** button.
- Choose the corresponding user.
- Click **OK** to save.

Repeat for each signatory.

7.4 Maintenance operations

7.4.1 Fix missing key 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

- From the **TOOLS** menu, select **Fix missing key 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

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

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.

7.4.2 Deactivate key holders

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

- From the **TOOLS** menu, select **Deactivate key holders**

Making a change

Key holder selection

Choose all key holders, or a single category.

Choose how recent activity will be considered for **not** making a key holder inactive. This allows you to choose a date and any key holder with key activity more recent than that date will not be made inactive.

Key holders

The matching key holders are shown and you can deselect any that you do not want to make inactive.

Ready to finish

A summary is displayed

Enter the confirmation requested.

Click **Finish** to deactivate the key holders.

7.4.3 Remove 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 removed.

Getting started

- From the **TOOLS** menu, select **Remove key holders**

Making a change

Key holder selection

There are 3 choices for the range of key holders to remove.

Choose how recent activity will be considered for **not** removing key holders. This allows you to choose a date and any key holder with key activity more recent than that date will not be removed. A good choice for this parameter is 3 months or more.

Unless you turn off the flag **Do not remove key holders who have lost keys** then any key holder who has lost a key will not be removed.

Key holders

The matching key holders are shown and you can deselect any that you do not want to remove.

Ready to finish

A summary is displayed

Enter the confirmation requested.

Click **Finish** to remove the key holders.

When you remove key holders, all history of key issue activity is lost. If you want a permanent record you may want to consider producing reports before removing key holders. The report is produced for each key holder that has activity and skipped for any key holders that have no activity.

7.5 Publishing services

General

ProMaster Key Manager Publishing services allow you to receive system updates from your locksmith who is running ProMaster Master-Keying 8 and also using the publishing service to send updates to you.

The publishing server is hosted and available to users of ProMaster Key Manager as a no-cost service that is available while ProMaster Key Manager support and maintenance is current. Additionally your locksmith must maintain current Support and Maintenance on their ProMaster Master-Keying 8 to be eligible to use the publishing service.

Architecture

The publishing service is implemented as a web HTTPS service. ProMaster Key Manager communicates with the publishing server from each workstation, so to use the service the workstation must have internet access to the publishing server permitted.

Your ProMaster Key Manager is configured and associated with your locksmith's ProMaster Master-Keying 8 using a handshake process during which a pairing code must be entered into ProMaster Key Manager and the pairing code is used to retrieve and decrypt an encryption key specific to your installation.

Whenever system updates are sent to you, they are encrypted to the individual encryption key of the pairing to your locksmith.

During the pairing process the encryption key is passed through the publishing server, but is itself encrypted and unable to be decrypted other than by the user retrieving the encryption key with the pairing code.

For this reason your locksmith must read the pairing code to you over the phone, not send it by email.

The only system information stored in plain text on the publishing server for each system is the system number, number of keys in the system and number of doors in the system. This information is used only in the case of technical problems that require us to aid you.

Put another way, the system description, address, client name, job details, key names, door names, keying etc are all stored encrypted to an encryption key specific to your installation.

Furthermore, if your locksmith generates a new encryption key and pairing code for you, then you will be unable to communicate with the server to retrieve system data until the new pairing code is entered and even then, existing systems will be unreadable because the encryption has changed, and in this case your locksmith must re-publish the system(s) to you.

User permissions

There are 2 permissions that apply to publishing services.

Setup company and associated data: This permission allows the publishing service to be configured. See [Configuring publishing](#)⁴⁹.

Setup company and associated data OR Import systems from locksmith: Either of these permissions allows the publishing service to be paired to your locksmith. See [Configure publishing data](#)⁵⁰.

Support and maintenance

The publishing server is available to users of ProMaster Key Manager as a no-cost service that is available while ProMaster Key Manager support and maintenance is current.

When your support and maintenance expires, publishing services are no longer available until support and maintenance is renewed and the new registration information applied to ProMaster Key Manager.

Technical information

The URL of the publishing server is pmpublish01.whsoftware.com

Data is transmitted using HTTPS and operates on the standard port 443.

7.5.1 Configure publishing

To start using the publishing service you must first configure publishing. To perform this process your computer must have internet access.

Configuring publishing, and indeed all publishing services, is available only when your registration support and maintenance is current.

When a new registration is entered (See [Change registration](#)⁵¹), you will be prompted to update the publishing information.

If the registration information in your ProMaster Key Manager database is not the same as that on the publishing server then publishing is disabled until you perform **Configure publishing** again.

Getting started

- From the **SETTINGS** menu, select **Configure publishing**

Configuration status

The configuration status reports the current status of the publishing configuration for your database.

Some examples are:

Message	Description
OK	Publishing is configured and may be used.
Not configured	Publishing has not been configured. To use publishing you must perform the configure publishing process.
Reconfiguration required	The registration information last sent to the publishing server is different to your registration. To use publishing you must perform the configure publishing process.
Maintenance and support expired	Support and maintenance for your ProMaster Key Manager license has expired, and publishing services are unavailable until support and maintenance is renewed. To use publishing you renew support and maintenance, apply your new registration code to ProMaster Key Manager and then perform the configure publishing process.

Publishing status

The publishing status reports the current status of the publishing configuration on the publishing server.

Some examples are:

Message	Description
OK	Publishing is configured and may be used.
Maintenance and support expired	Support and maintenance for your ProMaster Key Manager license has expired, and publishing services are unavailable until support and maintenance is renewed. To use publishing you renew support and maintenance, apply your new registration code to ProMaster Key Manager and then perform the configure publishing process.
Publishing service not contactable	The publishing service could not be contacted. Most likely this means that your computer does not have internet access or that your firewall or security services are prohibiting access to the publishing server. It is possible, but rare that this may result from the publishing server being unavailable due to maintenance requirements.
Publishing service remote failure	Communication with the publishing server failed. This is not an expected condition and you should seek support.
Publishing service remote registration mismatch. Seek support.	There has been an unexpected condition where your publishing data is not consistent with that on the publishing server and this needs support intervention to be resolved.
Not registered with publishing service	Publishing has not been registered on the publish server. To use publishing you must perform the configure publishing process.
Publishing service remote registration requires updating	The registration information last sent to the publishing server is different to your registration. To use publishing you must perform the configure publishing process.
Publishing is disallowed	The publishing server has disallowed your access. This may result from tampering or unreasonable use or abuse of the publishing service.

Publishing settings

Option	Description
Allow publishing service to be used	This must be on for publishing to be available. If you turn this option off then publishing will not be available in ProMaster Key Manager.

7.5.2 Configure publishing data

Publishing data configuration is about registering your ProMaster Key Manager with a pairing code generated by you locksmith. To perform this process your computer must have internet access.

Configuring publishing data is available only when your registration support and maintenance is current.

You may have multiple pairings, but normally you would have only one pairing with each locksmith with whom you work. In the situation where you have multiple key systems with a locksmith and those are not held on a single client record by the locksmith then you will need multiple pairings with that locksmith.

Getting started

- From the **SETTINGS** menu, select **Configure publishing data**

Making a change

- Use the **Add** and **Remove** buttons to set up your publishing data.

When adding a pairing, a 12 digit pairing code is read over the telephone to you by your locksmith and you enter it into the **Add Publishing Data** window.

Other functionality

Right click a Publishing data and choose **Refresh** to re-read the description if it has been changed by your locksmith. Normally it would be called "Default" and only when you have multiple pairings with the same locksmith would a different description be used.

7.6 Change registration

Your registration information contains the license details for features, users etc.

Registration information is changed when you purchase additional features or users, and also when you renew support and maintenance.

Getting started

- You must be logged in as the **admin** user
- From the **SETTINGS** menu, select **Change registration**

Making a change

- The **Current registration** tab shows details of the registration currently being used by the database.
- Paste your new registration into the **Enter registration** tab.
- After pasting your new registration, the **Preview** tab is available to see the contents of the new license.
- Click **OK** to save.

Using ProMaster Key Manager

Part

8

8 Using ProMaster Key Manager

8.1 Your locksmith

8.1.1 Systems created by your locksmith

This guide discusses a number of 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 8 to 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 8 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 8 may be absent. To update your data so that it is fully compatible with ProMaster Master-Keying 8, please ask your locksmith to send you all your ProMaster Key Manager systems from their ProMaster Master-Keying 8. 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 they will send you a new data file for you to import.

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

System you create	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 8 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, and after your signatories have authenticated the order, email your order to your locksmith. Your locksmith will import your order directly into ProMaster Master-Keying 8.
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 8 for order verification.

8.1.2 Importing a system from your locksmith

Getting started

- From the **SYSTEM** menu, select **Import system**

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.

8.1.3 Import system from publishing service

ProMaster Key Manager Publishing services allow you to receive system updates from your locksmith who is running ProMaster Master-Keying 8 and also using the publishing service to send updates to you.

See [Publishing services](#)⁴⁸.

Getting started

- From the **SYSTEM** menu, select **Import system from publishing service**

A list of systems available on the publishing server is shown.

You may select the systems you want to download and import.

If a system is not available (e.g. You do not have permissions to the system) then the reason is shown and you may not select that system.

Importing

- Select one or more systems.
- Click Download and import.

The system data is downloaded and then the **Import Systems From ProMaster Master-Keying** wizard is run. See [Importing a system from your locksmith](#)⁵⁴

After the system is imported, the publishing service is notified and the system is removed from the list available for download (Until such time that the locksmith sends it again).

8.1.4 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 8, 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 for a locksmith system is a little different to that for a standalone system.

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

Additionally, there is **Electronic authentication** (See [Signatory authentication](#)⁴⁶), 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.

8.1.5 Signature change request

To change signatories on a locksmith maintained system, you must complete the paperwork for your locksmith. See [Signature change form](#)¹¹⁹ for the process.

Signatory changes are made by your locksmith and appear when an update is imported from your locksmith. See [Importing a system from your locksmith](#)⁵⁴.

8.1.6 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 will 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.

8.2 Systems

8.2.1 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

- 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 tab

- Address and contact details are optional.

System details 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. The quantity 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 signatory security	Description
All keys require the system specified number of signatories	The quantity set for Key order signatory quantity is required to order any key. Any active signatories may make up the required number of signatories - but read also about mandatory signatories. See Entering signatories ⁵⁹
Allow a different number of signatories required for each key	The quantity set for Key order signatory quantity is required to order any key, but each key may be given an overriding number of signatories required for just that key. Any active signatories may make up the required quantity of signatories - but read also about mandatory signatories. See Entering signatories ⁵⁹
Individual signatories permitted and allow different number of signatories required for each key	The quantity set for Key order signatory quantity is required to order any key, but each key may be given an overriding quantity of signatories required for just that key. Each key must be assigned the signatories who are allowed to authorise that particular key. Any active signatories from those assigned to each key may make up the required number of signatories for that key - but read also about mandatory signatories. See Entering signatories ⁵⁹

For locksmith systems, there may be door ordering security defined also. This is maintained by the locksmith and shown in ProMaster Key Manager for information purposes only as ProMaster Key Manager orders are for keys only, not for doors.

- **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 then 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

- 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.

8.2.2 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 on where the system selection is being used, these settings may be pre-selected and unable to be altered.

8.2.3 Deleting a system

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

Deleting a system removes the system, all doors, keys, keying, jobs, key issues, keys on issue, key issue history etc.

Getting started

- From the **SYSTEM** menu, select **Delete system**.

Making a change

- Select the system to be deleted.
- Enter the confirmation requested.
- Click **OK** to delete the system.

There is no undo. When you type the confirmation text and click **OK**, the system is gone.

8.3 Signatories

Signatories are people who may authorise key orders.

Getting started

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

Making a change

- Use the **Add**, **Remove** and **Edit** buttons to set up your system signatories.
- See [Entering signatories](#)⁵⁹ for information on signatories.

Other functionality

Option	Description
Key authorities	Change which keys this signatory may order. Available when the type of key signatory security is "Individual signatories...". See Key authorities ⁶⁰ .
Key authorities matrix	Open a matrix of signatories and keys where you may alter an authority. Available when the type of key signatory security is "Individual signatories...". See Key authorities matrix ⁶⁰ .
Jobs authorised	Shows jobs that this signatory authorised. See Job history for signatory ⁵⁹ .

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

8.3.1 Entering signatories

Getting started

See [Signatories](#)⁵⁹.

Explanation of data fields

The **Name** is required, and must be unique within this system. All other values are optional, but you may benefit in maintaining control over the system by gathering a full set of details.

The **Active** flag is used to deactivate a signatory in the future, while still maintaining a history of the signatory activity.

The **Mandatory signatory** flag indicates that the signatory must be included on every order, or if individual key authorities are assigned to a key then must be on every order for that key.

Photo

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](#)¹⁴² may be used to adjust the photo.

8.3.2 Job history for signatory

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

See the topic [Signatories](#)⁵⁹ to learn how access the jobs authorised.

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

8.3.3 Key authorities

Available only if **Type of key signatory security** is set to **Individual signatories permitted and allow different number of signatories required for each key**.

Key authorities is one of several ways you may see and alter the keys that a signatory is permitted to order.

Getting started

See [Signatories](#)⁵⁹.

Making a change

- A list of keys is shown.
- Check any keys that the signatory is permitted to order.
- Right click the key list for more options.
- To copy the authorities from another signatory, click the **Options** button then **Copy from another signatory**.
- Click **OK** to save

For locksmith maintained systems all information is read-only

8.3.4 Key authorities matrix

Available only if **Type of key signatory security** is set to **Individual signatories permitted and allow different number of signatories required for each key**.

Key authorities matrix is one of several ways you may see and alter the keys that a signatory is permitted to order. The key authorities matrix is a matrix of all active signatories and all keys (other than disabled and replaced) so that you may get an overview of permissions and make rapid changes.

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

Getting started

See [Signatories](#)⁵⁹.

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

An explanation of the options

Option	Description
Find key	Search for keys. Keys that start with the text you enter are indicated with a purple arrow. If there is a key that is a full match for the text you entered then that key is selected as well as the purple arrow.
Key details	Shows information about the current key.

Find signatory	Search for signatories. Signatories that start with the text you enter are indicated with a purple arrow. If there is a signatory that is a full match for the text you entered then that signatory is selected as well as the purple arrow.
Signatory details	Shows information about the current signatory.
Toggle authority	Toggles the authority for the selected cells.
Authority on	Turns authority on for the selected cells.
Authority off	Turns authority off for the selected cells.
This key Key on	Turns authority on for the selected key for all signatories.
This key Key off	Turns authority off for the selected key for all signatories.
This key Undo changes to this key	Undoes all changes to the selected key, reverting it to the authorities it had when you opened the window.
This signatory Signatory on	Turns authority on for the selected signatory for all keys.
This signatory Signatory off	Turns authority off for the selected signatory for all keys.
This signatory Undo changes to this signatory	Undoes all changes to the selected signatory, reverting it to the authorities it had when you opened the window.

Other functionality

Right click on the matrix for other option. Some options on this pop-up menu are the same as the toolbar (however you can learn the shortcut keys by looking at the pop-up menu), but the new options are listed here.

Option	Description
Change orientation	Swaps the location of signatories and keys in columns/rows.
Show indicator for unassigned signatories and keys	Turn on to show a warning graphic by each key that does not have signatories assigned and by each signatory that does not have keys assigned.
Find next ...	Navigates from the current location to other authorities in each direction.

Notes

A green + graphic indicates each authority added and a red - graphic indicates each authority removed.

8.3.5 Door authorities

Available only if **Type of door signatory security** is set to **Individual signatories permitted and allow different number of signatories required for each door**.

For locksmith systems, there may be door ordering security defined also. This is maintained by the locksmith and shown in ProMaster Key Manager for information purposes only as ProMaster Key Manager orders are for keys only, not for doors.

When door ordering security is defined by your locksmith, this is the equivalent of [Key authorities](#)⁶⁰ for keys.

Getting started

See [Signatories](#)⁵⁹.

8.3.6 Door authorities matrix

Available only if **Type of door signatory security** is set to **Individual signatories permitted and allow different number of signatories required for each door**.

For locksmith systems, there may be door ordering security defined also. This is maintained by the locksmith and shown in ProMaster Key Manager for information purposes only as ProMaster Key Manager orders are for keys only, not for doors.

When door ordering security is defined by your locksmith, this is the equivalent of [Key authorities matrix](#)⁶⁰ for keys.

Getting started

See [Signatories](#)⁵⁹.

8.4 Keys

Getting started

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

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 find 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.

While all the search options are clearly worded, there are some more complex options that can help you refine your key search and it is worthwhile having a look at some of the options like "Key above" so that you are familiar with them should the need arise.

Making a change

- Use the **Add**, **Remove** and **Edit** buttons to set up your keys.
- See [Entering keys](#)⁶³ for information on keys.

Other functionality

Option	Description
Door access	Show the doors operated by the key. See Door access ⁶⁵ .
Keying matrix	Open the keying matrix with the initial view set to the current selection of keys. See Keying matrix ⁷⁵ .
Issues	Show 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 ⁸⁴ .
History	Shows a list of jobs where the key was ordered. See Key order history ⁶⁵ .
Signatory authorities	Show and alter the signatories permitted to order the key. See Key signatory authorities ⁶⁵ .
Signatory authorities matrix	Open the signatory key authorities matrix. See Key authorities matrix ⁶⁰ .
Bulk change	Open the bulk changer with the current selection of keys. See Bulk change keys ⁶⁷ .
Export	Export keys to a CSV file. See Exporting keys to a CSV file ⁶⁷ .
Print	Open the key report window with the highlighted door selected for printing. See the report Keys ¹⁰⁶ .
Import CSV	Import keys from a CSV file. See Importing keys from a CSV file ⁶⁸ .
Move up / Move down	Change the order of the keys. This is available <u>only</u> if the search has returned all keys, including replaced keys. See also Sorting keys ⁶⁵ .

Sort	Open the key sorter. See Sorting keys ⁶⁵ .
Find the key above this key	Perform a new search based on the key hierarchy of the current key.
Find keys below this key	
Find keys with the same key above as this key	

For locksmith maintained systems, almost all information is read-only, and you may not add new keys, make changes to keys, sort keys etc.

8.4.1 Entering keys

Getting started

See [Keys](#)⁶².

Explanation of data fields

Data field	Description
Key	The number that uniquely identifies this key within the 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 Understanding key designations and hierarchy ⁶⁴ .
Designation	The key designation specifies the keys purpose. See Understanding key designations and hierarchy ⁶⁴ .
Head colour	If you have specified that the key head has colours (See Creating a new system and system details ⁵⁷) then 1, 2 or 3 drop down lists will be available for key head colour selection. See Key colours ⁴⁰ to define the available colours.
Signatory quantity required	If you have defined your system security to allow this (See Creating a new system and system details ⁵⁷), then you may enter a number of signatories required to order this key. The system default is shown, and if you enter a value for Signatories quantity required then it will take precedence when validating a job with this key.
Risk	Premium edition only, and only if it has been enabled in the Application parameters ³³ . May be altered for locksmith maintained systems as well as your own systems. Allows you to categorise keys so that if they are lost you may produce more meaningful risk-related analysis. Used when reporting on compromised doors.
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.
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Saving the key

When you have finished entering your key information, either click **OK** if you have no more keys to add, or click **Save / Add another** to save this key then continue adding keys. When you click **Save / 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.

When you use **Save / Add another** to add multiple keys, ProMaster Key Manager indicates at the bottom of the window the key that was most recently added. This will assist you in not omitting any keys when entering them from a list.

Save / Add another is available when adding keys, but not when modifying an existing key.

Editing keys

If you edit a key that has been ordered, the **Key number** will be protected from change. The **Edit key number** button allows you to make this field editable.

Notes

In the top right of this window, **Issues** indicates the number of times this key has been ordered.

8.4.2 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 and must 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 operated by key A.
- If a key is not the **Key above** another key, then its **designation** must not be Master.

Designation

Designation	Description
Master	A Master key fits into a pure hierarchy 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 hierarchy layout. A Change key must not be the key above for another key.
Selective	A Selective key does not fit into a pure hierarchy layout. A selective key must not 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. Only for locksmith maintained systems.
Control	The Control key available only on some locking products is for disassembling the cylinder.

8.4.3 Door access

Door access is one of several ways to see keying. This method allows you to select a single key and see the doors that it operates.

Getting started

See [Keys](#)⁶².

About door access

The **Door access for key** window shows the doors that the key operates.

For each door you may see the keying (I.e. the keys that operate that door). See [Key access](#)⁷¹.

You may print a keys report for the key by clicking the **Print key and doors** button. See the report [Keys](#)¹⁰⁶.

8.4.4 Key order history

Key history allows you to see the orders that included the key.

Getting started

See [Keys](#)⁶².

A list of orders is displayed.

You may click **Details** to open the highlighted order.

You may click **Print** to open to access the [Key order history](#)¹¹⁹ report.

8.4.5 Key signatory authorities

Available only if **Type of key signatory security** is set to **Individual signatories permitted and allow different number of signatories required for each key**.

Authorised signatories for key is one of several ways you may see and alter the keys that a signatory is permitted to order.

Getting started

See [Keys](#)⁶².

Making a change

A list of signatories is shown.

Check any signatories that are permitted to order the key.

8.4.6 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.

Generally, keys are added after the selected key when adding from the keys window, otherwise at the end of the key 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

- From the **SYSTEM** menu, select the drop down below **Keys** and choose **Sort keys**.

Making a change

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 pop-up context menu (right click mouse) and through various hot-key combinations.

Selecting keys

Keys may be selected using mouse/keyboard, including shift-clicking to select a range and ctrl-clicking to select dis-contiguous keys, or various menu options such as:

- Select all
- Select none
- Select keys with the same category (The currently highlighted key must have a category)
- Select to bottom (Selects from the currently highlighted key to the end)
- Select keys with the same key above
- Select the key above this key
- Select keys below this key

Sorting keys

The sorting operation is applied to the selected keys.

Option	Description
Move up	Moves all selected keys up one position.
Move down	Moves all selected keys down one position.
Move up page	Moves all the selected keys up half the height of the window.
Move down page	Moves all the selected keys down half the height of the window.
Bring together	Brings all the selected keys together, positioning them under the topmost selected key.
Sort key number as text	Sorts the selected keys by doing a text comparison on their key numbers.
Sort key number	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
Sort USA	Sorts the selected keys according to the USA key naming convention.
Sort by description	Sorts the selected keys by their descriptions.

Finally, to save your changes click the **OK** button.

8.4.7 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 useful for changing a number of keys when you have entered them without this information or to rapidly fix data errors.

Getting started

- From the **SYSTEM** menu, select the drop down below **Keys** and choose **Bulk change keys**.
- Alternatively, initiate the bulk change from the keys window after having searched for a range of keys. See [Keys](#)⁶².

Making a change

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

- Ensure that the correct keys are selected, selecting or deselecting them as necessary.
- In the **Data type** list, 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)
- Click the **Apply change** button.

Repeat these 4 steps as many times as you want.

Finally, to save your changes click the **OK** button.

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 **Clear selection** buttons. Right click on the list for more selection options.

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.

Keys that have been changed are indicated by a pencil graphic next to the key selection. You may undo changes to keys by right clicking and choosing **Undo**. Right click and choose **Show changed values** so see a graphic indicator of the individual values that have been altered.

8.4.8 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.

Getting started

See [Keys](#)⁶².

Alternatively, see [Export doors and keys](#)¹³¹ to export doors, keys and keying at the same time.

Exporting data

A simple wizard steps you through the process of choosing where the data will be written, choosing which data to export and choosing export options.

- Choose the file name for the export.
- The system will be selected to match the keys you are viewing.

- You may choose to include inactive data (e.g. keys that have been marked as deleted or disabled)
- Choose if you want headings in the export (highly recommended)
- Click **Finish** to perform the export.

8.4.9 Importing keys from a CSV file

If you have a CSV file with key information you can import this data.

Read the topic [Key import \(CSV\) file format](#)¹³⁸ for more information on the file contents allowed.

The **key** field in the import is matched to existing values to determine if the key is new (and therefore will be added) or existing (and therefore will be updated to the new information).

Getting started

See [Keys](#)⁶².

Importing data

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 four 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 items, if you are updating existing items, 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 any 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, or if you are happy to ignore the erroneous rows 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.

8.4.10 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

- From the **SYSTEM** menu, select **Keys hierarchy**
- You must select a system. The key hierarchy for the system is shown.

Other functionality

From the **Options** menu choose **Print**. See the report [Key hierarchy](#)¹⁰⁷.

8.5 Doors

Getting started

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

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 find 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.

Making a change

- Use the **Add**, **Remove** and **Edit** buttons to set up your doors.
- See [Entering doors](#)⁷⁰ for information on doors.

Other functionality

Option	Description
Key access	Show the keys that operate the door. See Key access ⁷¹ .
Keying matrix	Open the keying matrix with the initial view set to the current selection of doors. See Keying matrix ⁷⁵ .
Door service	Record door servicing information. See Door service ⁷¹ .
Bulk change	Open the bulk changer with the current selection of doors. See Bulk change doors ⁷³ .
Export	Export doors to a CSV file. See Exporting Doors to a CSV file ⁷⁴ .

Print	Open the door report window with the highlighted door selected for printing. See the report Doors ¹⁰⁸ .
Import CSV	Import doors from a CSV file. See Importing doors from a CSV file ⁷⁴ .
Move up / Move down	Change the order of the doors. This is available <u>only</u> if the search has returned all doors. See also Sorting doors ⁷² .
Sort	Open the door sorter. See Sorting doors ⁷² .
Signatory authorities	Show the signatories permitted to order the door. See Door signatory authorities ⁷² . Locksmith systems only.

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

8.5.1 Entering doors

Getting started

See [Doors](#)⁶⁹.

Explanation of data fields

Data field	Description
Door	The number that uniquely identifies this Door within the system. Each Door has a unique key 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 in 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.
Stage	While normally not used, the stage allows you to record doors by stage in large ongoing building projects.
Different keying side 2	Turn this on for doors with a double cylinder that are keyed differently on the inside. If the internal keying is the same as the external keying, do not turn this on.
Construction keyed	Not available 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.
Height, Width, Thickness	The dimensions of the door. Useful if you have this information and wish to record it so you have it available later to assist in determining appropriate products.
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.

Saving the door

When you have finished entering your door information, either click **OK** if you have no more doors to add, or click **Save / Add another** to save this door then continue adding doors. When you click **Save / 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 (Door number, Description) are progressed automatically. When adding a whole bunch of contiguously numbered doors, this is extremely useful.

When you use **Save / Add another** to add multiple doors, ProMaster Key Manager indicates at the bottom of the window the door that was most recently added. This will assist you in not omitting any doors when entering them from a list.

Save / Add another is available when adding doors, but not when modifying an existing door.

8.5.2 Key access

Key access is one of several ways to see keying. This method allows you to select a single door and see the keys that operate it.

Getting started

See [Doors](#)⁶⁹.

About key access

The **Door keying** window shows the keys that operate the door.

For each key you may see the doors that the key can access. See [Door access](#)⁶⁵.

For each key you may see the issues of the key, including to whom each key is issued. See [Key issues](#)⁸⁴.

You may print a keys report for the key by clicking the **Print door and keys** button. See the report [Doors](#)¹⁰⁸.

8.5.3 Door service

Door servicing may be recorded in ProMaster Key Manager.

Getting started

See [Doors](#)⁶⁹.

- Right click on the door and choose option **Service**.

Making a change

- Use the **Add, Remove** and **Edit** 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.

8.5.4 Door signatory authorities

Available only if **Type of door signatory security** is set to **Individual signatories permitted and allow different number of signatories required for each door** and only for locksmith maintained systems.

Authorised signatories for door is one of several ways you may see the doors that a signatory is permitted to order.

This is maintained by the locksmith and shown in ProMaster Key Manager for information purposes only as ProMaster Key Manager orders are for keys only, not for doors.

Getting started

See [Doors](#)⁶⁹.

A list of signatories is shown.

8.5.5 Sorting doors

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

Generally, doors are added after the selected door when adding from the doors window, otherwise at the end of the door 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

- From the **SYSTEM** menu, select the drop down below **Doors** and choose **Sort doors**.

Making a change

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 pop-up context menu (right click mouse) and through various hot-key combinations.

Selecting doors

Doors may be selected using mouse/keyboard, including shift-clicking to select a range and ctrl-clicking to select dis-contiguous doors, or various menu options such as:

- Select all
- Select none
- Select doors with the same area (The currently highlighted door must have an area)
- Select doors with the same stage (The currently highlighted door must have a stage)
- Select to bottom (Selects from the currently highlighted door to the end)

Sorting doors

The sorting operation is applied to the selected doors.

Option	Description
Move up	Moves all selected doors up one position.
Move down	Moves all selected doors down one position.
Move up page	Moves all the selected doors up half the height of the window.

Move down page	Moves all the selected doors down half the height of the window.
Bring together	Brings all the selected doors together, positioning them under the topmost selected door.
Sort door number as text	Sorts the selected doors by doing a text comparison on their door numbers.
Sort door number	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
Sort by description	Sorts the selected doors by their descriptions.

Finally, to save your changes click the **OK** button.

8.5.6 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

- From the **SYSTEM** menu, select the drop down below **Doors** and choose **Bulk change keys**.
- Alternatively, initiate the bulk change from the doors window after having searched for a range of doors. See [Doors](#)⁶⁹.

Making a change

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

- Ensure that the correct doors are selected, selecting or deselecting them as necessary.
- In the **Data type** list, 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)
- Click the **Apply change** button.

Repeat these 4 steps as many times as you want.

Finally, to save your changes click the **OK** button.

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 **Clear selection** buttons. Right click on the list for more selection options.

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.

Doors that have been changed are indicated by a pencil graphic next to the door selection. You may undo changes to doors by right clicking and choosing **Undo**. Right click and choose **Show changed values** so see a graphic indicator of the individual values that have been altered.

8.5.7 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.

Getting started

See [Doors](#)⁶⁹.

Alternatively, see [Export doors and keys](#)¹³¹ to export doors, keys and keying at the same time.

Exporting data

A simple wizard steps you through the process of choosing where the data will be written, choosing which data to export and choosing export options.

- Choose the file name for the export.
- The system will be selected to match the doors you are viewing.
- Choose if you want headings in the export (highly recommended)
- Click **Finish** to perform the export.

8.5.8 Importing doors from a CSV file

If you have a CSV file with door information you can import this data.

Read the topic [Door import \(CSV\) file format](#)¹³⁹ for more information on the file contents allowed.

The **door** field in the import is matched to existing values to determine if the door is new (and therefore will be added) or existing (and therefore will be updated to the new information).

Getting started

See [Doors](#)⁶⁹.

Importing data

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 four 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 items, if you are updating existing items, 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 any 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, or if you are happy to ignore the erroneous rows 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.

8.5.9 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

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

Using find door

- Fill in one or more of the search fields with the information you know.
- Click **Find** to perform the search.

Other functionality

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

8.6 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

- From the **SYSTEM** menu, select **Keying matrix**
- You must select a system.

Also accessible from doors search window and keys search window

An explanation of the options

When the keying matrix is opened, all doors and keys are loaded, however there are options to restrict the view to a subset of keys or doors to make it easier to understand.

Option	Description
Find key	Search for keys. Keys that start with the text you enter are indicated with a purple arrow. If there is a key that is a full match for the text you entered then that key is selected as well as the purple arrow.
Key details	Shows information about the current key.
Key display	<p>Show all keys: All keys are shown.</p> <p>Show selection: This option is available if you invoke the keying matrix from the keys search window and restricts the keys displayed to those returned in the key search window.</p> <p>Hide masters: Master keys are not shown but all other keys are shown. This can be use for for large hierarchical, particularly in conjunction with the propagation options, to simplify the display.</p> <p>Changed keys: This option shows keys where keying has been added or removed, and is useful for checking your changes before saving. This option makes the keying matrix read-only.</p>
Find door	Search for doors. Doors that start with the text you enter are indicated with a purple arrow. If there is a door that is a full match for the text you entered then that door is selected as well as the purple arrow.
Door details	Shows information about the current door.
Door display	<p>Show all doors: All doors are shown.</p> <p>Show selection: This option is available if you invoke the keying matrix from the doors search window and restricts the doors displayed to those returned in the door search window.</p> <p>Changed doors: This option shows doors where keying has been added or removed, and is useful for checking your changes before saving. This option makes the keying matrix read-only.</p>
Propagation	<p>Add keys above: With this option on, then when you turn keying on for a key, all keys <u>above</u> that key are turned on also.</p> <p>Remove keys above: With this option on, then when you turn keying off for a key, all keys <u>above</u> that key are turned off also.</p> <p>Remove keys below: With this option on, then when you turn keying off for a key, all keys <u>below</u> that key are turned off also.</p>
Toggle keying	Toggles the keying when a single cell selected or a valid selection (green highlight, horizontal, vertical or diagonal).
Keying on	Turns keying on when a single cell selected or a valid selection (green highlight, horizontal, vertical or diagonal).
Keying off	Turns keying off when a single cell selected or a valid selection (green highlight, horizontal, vertical or diagonal).
Selection on	Turns keying on for all cells in a selection, regardless of the shape of the selection. Propagation does not apply.

Selection off	Turns keying off for all cells in a selection, regardless of the shape of the selection. Propagation does not apply.
This key Key on	Turns keying on for the selected key for all doors.
This key Key off	Turns keying off for the selected key for all doors.
This key Undo changes to this key	Undoes all changes to the selected key, reverting it to the keying it had when you opened the window.
This door Door on	Turns keying on for the selected door for all keys.
This door Door off	Turns keying off for the selected door for all keys.
This door Undo changes to this door	Undoes all changes to the selected door, reverting it to the keying it had when you opened the window.

Other functionality

Right click on the keying matrix for other option. Some options on this pop-up menu are the same as the toolbar (however you can learn the shortcut keys by looking at the pop-up menu), but the new options are listed here.

Option	Description
Export keying to CSV file	See Exporting keying to a CSV file ⁷⁷
Import keying from CSV file	See Importing keying from a CSV file ⁷⁸ .
Change orientation	Swaps the location of doors and keys in columns/rows.
Use condensed layout	Turn on for a compressed layout. Changed keyings are not shown and less information for each door and key is shown, but many more doors and keys will be visible without scrolling.
Show indicator for unassigned doors and keys	Turn on to show a warning graphic by each key that does not have doors assigned and by each door that does not have keys assigned.
Show indicator for doors with the same stamping	Turn on to show a blue arrow graphic by each door that has the same stamping as the current door. This operates on the same side of each door (I.e. either external or internal, but not both at the same time)
Find next ...	Navigates from the current location to other keyings in each direction.

Notes

In normal layout (not condensed), a green + graphic indicates each keying added and a red - graphic indicates each keying removed.

Changes are not saved until you click **OK**.

8.6.1 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.

Getting started

See [Keying matrix](#)⁷⁵.

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

Alternatively, see [Export doors and keys](#)¹³¹ to export doors, keys and keying at the same time.

Exporting data

A simple wizard steps you through the process of choosing where the data will be written, choosing which data to export and choosing export options.

- Choose the file name for the export.
- The system will be selected to match the doors you are viewing.
- Choose if you want headings in the export (highly recommended)
- Click **Finish** to perform the export.

8.6.2 Importing keying from a CSV file

If you have a CSV file with keying information you can import this data.

Read the topic [Keying import \(CSV\) file format](#)¹⁴⁰ for more information on the file contents allowed.

The **key** field in the import is matched to existing values to determine if the key is new (and therefore will be added) or existing (and therefore will be updated to the new information).

Getting started

See [Keying matrix](#)⁷⁵.

Right click the keying matrix and choose **Import keying from CSV file**.

Importing data

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 four 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.

Propagation: This option allows the keying you import to be propagated to associated keys. Use with caution. The safe option is **No keying propagation**.

- 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 any 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, or if you are happy to ignore the erroneous rows 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.

Notes

The imported keying is stored in the keying matrix. To save it, you must now click **OK** in the keying matrix. If the keying imported was not what you expected, click **Cancel** in the keying matrix to discard all changes.

8.7 Documents

Any amount of documentation may be stored against a system. Documentation or images may be 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](#)¹³³ **Default values for "System document type"** selection to configure the default options for the document type.

Alter the [Application parameter](#)¹³³ **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. See [Doors](#)¹⁰⁸.

The user must have permissions to access documents - see [Security groups](#)⁴³.

Getting started

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

8.7.1 Storing documents

Getting started

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

Making a change

- Use the **Add**, **Remove** and **Edit** buttons to enter and alter your 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](#)¹⁴² 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 matched 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.

8.8 Orders

Getting started

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

Making a change

- Use the **Add**, **Remove** and **Edit** buttons to enter and alter orders.
- See [Entering orders](#)⁸⁰ for information on orders.

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.

Other functionality

Option	Description
Email order	Emails to the order to your locksmith for them to import into ProMaster Master-Keying 8. Available on locksmith systems when the order is released.
Save order to file	Saves the order to a file for your locksmith for them to import into ProMaster Master-Keying 8. You must get the file to your locksmith. You can use this option instead of Email order if the machine you work on does not have email access. Available on locksmith systems when the order is released.
Print order	Print the order. Available on all systems when the order is released.
Receive	Receive the keys from the order (locally maintained system) or acknowledge the order as complete (locksmith systems). See Receiving keys from your order ⁸³
Print list	Prints the list of orders.

8.8.1 Entering orders

Getting started

See [Orders](#)⁸⁰.

An explanation of the options

The **Order** window is comprised of five tabs.

Order tab

Enter your order number and confirm that the delivery details are correct. The **Copy from** address links give you quick access 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.

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 shown 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 authorities](#)⁶⁰

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 order the keys.

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

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

Option	Description
Find key	Search for a key by key number
Key details	Shows information about the selected key.
Show all keys Show ordered keys Show unordered keys Show keys not previously ordered More key display choices	Restrict the keys that are displayed. See Filtering which keys you can see ⁸²
Door access	Shows the doors that the key operates. See Door access ⁶⁵ .
History	Shows previous orders for the key.
Copy quantity to next	Copies the quantity from the current key to the next key.
Copy quantity and note to next	Copies the quantity and notes from the current key to the next key,
Order all keys	Order all keys that have not previously been ordered. You will be asked for the quantity of each.
Order keys from list	See Ordering keys from a list ⁸²

To remove a key from the order, change its quantity to 0.

At times you have a pile of keys to order, and they are all the same quantity. There's an easier way to do this. After entering the quantity (and possibly a note) for the first key, press F12 to copy the quantity to the next line, or press Shift-F12 to copy the quantity and note down to the next line.

Documents tab

The documents tab allows you to store documents for the system (see [Documents](#)⁷⁹), but rather than being general document they will be associated with the job.

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 **Order complete** 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 **Email order** button is available to send the order to your locksmith. See [Orders](#)⁸⁰.

Authorising an order

If you have configured ProMaster Key Manager for electronic signatory authorisation (see [Signatory authentication](#)⁴⁶) 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](#)⁸³.

8.8.2 Filtering which keys you can see

It is possible to restrict the keys displayed in the order. This may be useful when there are many keys in a system.

Getting started

See [Orders](#)⁸⁰.

Choose the filter conditions.

Click **OK** to apply the filter.

8.8.3 Ordering keys from a list

If you receive a list of keys (perhaps via email) that need to be ordered, this process makes the keys to the order easier.

Getting started

See [Orders](#)⁸⁰.

Making a change

- Right click on the keys in your job and select **Order keys from list**
- Copy the list of keys to the clipboard
- Paste the keys into the space provided in the **Order Keys From List** window.
- Enter the quantity you require and any other options.

The list is checked and reports an error if any keys are duplicated or do not exist.

Click **OK** to add the keys to the order.

8.8.4 Signatory authorisation

If you have configured ProMaster Key Manager for electronic signatory authorisation (see [Signatory authentication](#)⁸⁰) then each signatory must authorise the order before it can be saved or emailed to your locksmith.

Getting started

See [Orders](#)⁸⁰.

Authenticating

- To authorise each signatory, right click on the signatory and select **Authorise**
- The signatory must enter their password then click **OK**.

Repeat this process for each signatory on the order.

8.8.5 Receiving keys from your order

Getting started

See [Orders](#)⁸⁰.

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.

8.8.6 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.

Getting started

See [Orders](#)⁸⁰.

8.9 Key issues

Getting started

See [Keys](#)⁶².

About key issues

All issues of the selected key are shown. There are 4 filter buttons for restricting the view of the 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.

Other functionality

Option	Description
Holding	If the key is on issue, this will show the holding. See Key issue holding ⁸⁴ and Key bunch holding ⁸⁷ .
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
Lost / broken details	If the key issue is lost or broken, this will show the details about the key loss or key breakage.
Hook	Allows you to change the hook and key cabinet for the key issue or key bunch. See Change the hook for a key ⁹⁰ and Change the hook for a key bunch ⁹⁰ .
Key has been lost	Access the Lost key ⁸⁷ wizard to record the selected key as lost.
Key has been broken	Access the Broken key ⁸⁸ wizard to record the selected key as broken.

8.9.1 Selecting a key issue

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

The key issue status for the search may be restricted depending on where the key issue is to be used. E.g. For issuing a key the status must be "Hook".

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.

8.9.2 Key issue holding

Getting started

See [Key issues](#)⁸⁴.

About 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)

8.9.3 Finding 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

- From the **ISSUES** menu, select **Find packet**

The exact packet number must be entered

Other functionality

Option	Description
Key holder	Show the key holder to whom the key was issued.
Key	Show the key information.
Key bunch	If the item is a key bunch, show the keys in the bunch.
Door access	Show the doors operated by the key or key bunch.

8.10 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

- From the **ISSUES** menu, select **Key bunches**

Making a change

- Use the **Add**, **Remove** and **Edit** buttons to set up your key bunches.
- See [Entering key bunches](#)^[86] for information on key bunches.

Other functionality

Option	Description
Door access	Shows the doors accessed by the key bunch. See Door access ^[86]
Holding	If the bunch is on issue, shows information about the key bunch holding. See Key bunch holding ^[87]

History	Shows when keys were added to or removed from the key bunch. See Key bunch history ⁸⁶
Bunch has been lost	Takes you to Lost keys ⁸⁷ to record the key bunch as lost.
Replace broken key	Takes you to Broken keys ⁸⁸ to replace a broken key in the key bunch.
Print	Prints a report of the keys in the bunch. See the report Key bunch ¹¹⁵ .
Print list	Prints the list of key bunches. See the report Key bunch list ¹¹⁴ .

8.10.1 Entering key bunches

Getting started

See [Key bunches](#)⁸⁵.

Notes

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](#)³³ "Allow bunches to contain multiple issues of the same key"

8.10.2 Door access

Getting started

See [Key bunches](#)⁸⁵.

About door access

The **Key bunch access** window shows the doors that the key bunch operates by taking into consideration all keys in the key bunch

8.10.3 Key bunch history

Getting started

See [Key bunches](#)⁸⁵.

About key bunch history

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

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

8.10.4 Key bunch holding

Getting started

See [Key bunches](#)⁸⁵.

About key bunch holding

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

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 bunch (e.g. Password, Signed on signature pad, Signed key issue confirmation and scanned back into ProMaster Key Manager)

8.11 Lost and broken keys

8.11.1 Lost key

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

Lost 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

- From the **ISSUES** menu, select **Lost key**

Using lost keys

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

A key has been lost

- You must select the keys that have been lost. This is done by using the **Select keys** and **Select keys by key holder** buttons. 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 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** buttons. 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.

Fees

Premium edition only.

If the key holder has paid a deposit on a key and the key is lost, then the deposit is retained. Otherwise, the key holder's key holder category determines the amount of the lost 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.

8.11.2 Found lost key

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

- From the **ISSUES** menu, select the drop down below **Lost key** and choose **Found lost key**.

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** button. You may select multiple keys to be found 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** button. 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.

8.11.3 Broken key

Broken keys may be accessed from various places in the program, or from the main menu.

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

- From the **ISSUES** menu, select **Broken key**

Using broken keys

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

A key has been broken

- You must select the keys that have been broken. This is done by using the **Select keys** and **Select keys by key holder** buttons. 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 in a key bunch has been broken

- You must select the key bunch that has a broken key. This is done by using the **Select key bunch** and **Select key bunch by key holder** buttons.
- 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 as a replacement.
- 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 broken, then the deposit is retained. Otherwise, the key holder's key holder category determines the amount of the 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.

8.11.4 Unbreak key

If you have marked a key as broken (See [Broken key](#)¹⁸⁸) there are 2 reasons why you may want to change the key to being not broken.

1. You made an error and marked the key as broken when it was not broken
2. Your locksmith has manufactured the same key issue to replace the broken key issue.

Generally it is unwise to re-manufacture a broken or worn key with the same issue number. When a key is re-manufactured with the same issue number there is no record that the key was replaced, and you have no way of tracing how often keys need to be replaced, who is repeatedly breaking keys etc. Better practice is to mark the key issue as broken and have a new key issue manufactured by your locksmith.

Un-break keys is a simple wizard that collects information before recording your changes.

Getting started

- From the **ISSUES** menu, select the drop down below **Broken key** and choose **Unbreak key**.

Using un-break keys

- You must select the key(s) that are to be "un-broken". This is done by using the **Select keys** button. You may select multiple keys to be un-broken in a single operation.
- You will be asked verify the actions that are to happen before you may complete the operation.

8.12 Key cabinet

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

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

Using the key cabinet

Option	Description
Issue	Issues the key or key bunch to a key holder. See Issue keys and key bunches ⁹⁵
Hook	Allows you to change the hook and key cabinet for the key issue or key bunch. See Change the hook for a key ⁹⁰ and Change the hook for a key bunch ⁹⁰ .
Door access	Shows the doors that the key or key bunch opens.
Keying matrix	Shows the doors that the key or key bunch opens in the keying matrix.
Issues	Shows all issues of the same key.
History	Shows the key order history for the selected key. See Key order history ⁶⁵
Print	Prints the key cabinet contents. See the report Key cabinet ¹¹³

8.12.1 Change the hook for a key

Getting started

See [Key cabinet](#)⁹⁰.

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

Making a change

Select the key issue you want to change and click **Hook**.

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.

8.12.2 Change the hook for a key bunch

Getting started

See [Key cabinet](#)⁹⁰.

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

Making a change

Select the key bunch you want to change and click **Hook**.

Choose the new **Key cabinet** (Premium edition).

Enter the **Hook** name.

Click **OK** to make the change.

8.13 Overdue key issues

You should consider **Overdue keys** to be your to-do list. You should pursue the return of overdue issues, or reissue them if an extension is required.

ProMaster Key Manager may be configured to show overdue keys each time you log in. See [Setting your preferences](#)²¹.

Getting started

- From the **ISSUES** menu, select **Overdue keys**

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.

Other functionality

Option	Description
Details	Shows information about the holding. See Key issue holding ⁸⁴
Key holder	Shows information about the key holder,
Email key holder	Generates an email to the key holder using the email template defined for the corresponding key holder category ³⁶ .
Key	Shows information about the key.
Key bunch	If the item is a key bunch, shows the key bunch.
Reissue keys	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 reissued. You may reissue other overdue keys for the same key holder by selecting them for reissue. See Reissue keys and key bunches ⁹⁶
Return keys	Takes you to the Return keys window with the key holder already selected and the current key added to the list of keys to be returned. You may return other keys for the same key holder by selecting them for return. See Return keys and key bunches ⁹⁸
Lost key	Takes you to the Lost keys or Lost key bunch window with the key issue or key bunch already selected.
Broken key	Takes you to the Broken keys window with the key issue already selected.
Print	Prints the overdue keys list. See the report Overdue keys ¹¹⁵ .

8.14 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 (i.e. Holdings) or printing reports of keys on issue.

Getting started

- From the **ISSUES** menu, select **Key holders**

Using the key cabinet

Option	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 ⁹³
Key issue report	Prints a key issue responsibility acceptance report. See the report Key issue responsibility acceptance ¹²³ .
Key return report	Prints a key return confirmation reports. See the report Key return confirmation ¹²⁴ .
Documents	Takes you to the Key holder documents ⁹⁴ to see documents stored against the key holder or add new documents. Premium edition only.
Store scanned key issue responsibility acceptance form	Takes you to Store scanned key issue responsibility acceptance ⁹³ to select one or more keys and to scan the signed form that was produced when keys were issued and store it. Premium edition only.
Key holder has lost a key	Takes you to Lost keys ⁸⁷ to record keys or the key bunch that are on issue to the key holder as lost.
Key holder has broken a key	Takes you to Broken keys ⁸⁸ to record keys that are on issue to the key holder as broken.

8.14.1 Entering key holders

Getting started

See [Key holders](#)⁹².

Explanation of data fields

The more information you enter about a key holder, the easier it will be to contact the key holder in the future.

Data field	Description
First name, last name	Each key holder must have a first name and last name
Area	The area allows you to classify key holders.
Description	A description to help you remember who the key holder is.
Category	Specified the key holder category for the key holder, which then sets various values used for issuing and returning keys for the key holder. See Key holder categories ³⁶
Notes tab	On the notes tab you record any amount of notes about the key holder.
Photo tab	On the photo tab you may store a photo of the key holder. Buttons are provided to open an image file, acquire from your camera 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 Take photo ¹⁴³ and Image editor ¹⁴² .
Documents tab	Allows you to store documents for the key holder. Premium edition only.

Also, when you are adding a key holder, the **Options** button 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 tick 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.

Saving the key holder

When you have finished entering your key holder information, either click **OK** if you have no more key holders to add, or click **Save / Add another** to save this key holder then continue adding key holders. When you click **Save / Add another**, ProMaster Key Manager will save your key holder, leaving the window open for another key holder to be added, and some fields will retain the values you entered while others (First name, last name, employee no) are cleared. This is particularly useful when you are adding multiple staff.

Save / Add another is available when adding key holders, but not when modifying an existing holder.

8.14.2 Key holdings and door access

Key holdings and door access shows the keys and key bunches currently on issue, the history of 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.

Getting started

See [Key holders](#)⁹².

Using 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.

8.14.3 Store scanned key issue responsibility acceptance

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).

Getting started

The store key issue responsibility acceptance form wizard is accessed from the key holders window.

See [Key holders](#)⁹².

Authenticating keys

Choose keys

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](#)¹⁰²).

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](#)¹⁰³)

When all keys and key bunches to which the signed form 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](#)¹⁰¹ for information about the next step.

8.14.4 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](#)⁹² window, or when selecting a key holder when doing [Issue keys and key bunches](#)⁹⁵ or [Return keys and key bunches](#)⁹⁸.

Getting started

See [Key holders](#)⁹².

Making a change

- Use the **Add**, **Remove** and **Edit** buttons to enter and alter your 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](#)¹⁴² 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.

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

8.15 Issuing and returning keys

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

Operation	Description
Issuing keys and key bunches ⁹⁵	Issue one or more keys and/or key bunches to a key holder.
Reissue keys and key bunches ⁹⁶	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 ⁹⁸	Return one or more keys and/or key bunches from a key holder.
Return keys and key bunches and issue to another key holder ⁹⁹	Return one or more keys and/or key bunches from a key holder and immediately issue them to another key holder.

8.15.1 Issue 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 is pre-selected.

Getting started

- From the **ISSUES** menu, select **Issue keys**

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](#)⁹⁴.

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](#)⁸⁴).

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 [Key bunches](#)⁸⁵)

Premium 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 Add pre-issued keys to list selection will be available. When using pre-issued keys, you may not mix them with other 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 from the drop down list (See [Issue and return reasons](#)³⁹). The reason is optional.

Enter an **authorised by** name or select one from the drop down list (See [Authorisation names](#)³⁹). The authorised by name is optional.

The return date and time is calculated from the settings for the corresponding [Key holder category](#)³⁶. 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 the report [Key issue responsibility acceptance](#)¹²³). 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 [Finding issued keys by packet](#)⁸⁵). If you choose to print a packet label, options become available [Packet printing options](#)¹⁰³ 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 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](#)³⁶.

Authentication

Choose how the key holder will accept the keys. Premium edition only.

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 ¹⁰¹
The key holder will enter their password	The user will enter their password. An option is provided for changing password. See Authenticating key issue by password ¹⁰²
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 ¹⁰²

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.

8.15.2 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 reissue keys wizard may be accessed from the main menu or from several other places where some information is pre-selected.

Getting started

- From the **ISSUES** menu, select **Reissue keys**

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 reissuing 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](#)⁹⁴.

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 [Selecting key issues by key holder](#)¹⁰² or for key holder categories see [Selecting key issues by key holder category](#)¹⁰²).

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](#)¹⁰³ or for key holder categories see [Selecting key bunches by key holder category](#)¹⁰³).

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 from the drop down list (See [Issue and return reasons](#)³⁹). The reason is optional.

Enter an **authorised by** name or select one from the drop down list (See [Authorisation names](#)³⁹). The authorised by name is optional.

The return date and time is calculated from the settings for the corresponding [key holder category](#)³⁶. 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 the report [Key issue responsibility acceptance](#)¹²³). 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 holder by email. If you choose the email option, you may choose to show 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](#)³⁶.

Ready to finish

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

8.15.3 Return keys and key bunches

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

The return keys wizard may be accessed from the main menu or from several other places where some information is pre-selected.

Getting started

- From the **ISSUES** menu, select **Return keys**

Returning 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 you are returning keys from.

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](#)⁹⁴.

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 [Selecting key issues by key holder](#)¹⁰²).

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](#)¹⁰³)

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](#)⁸⁴)

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 [Key bunches](#)⁸⁵)

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 from the drop down list (See [Issue and return reasons](#)¹³⁹). The reason is optional.

Click **Next**.

Options

Choose if you want to print a key return confirmation report (See the report [Key return confirmation](#)¹²⁴).

Choose if you want to notify the key holders by email. If you choose the email option, you may choose to show the email window before sending, you may alter the key holder's email address and also change the email message. The default email message is determined by the [key holder category](#)³⁶.

Ready to finish

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

8.15.4 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

- From the **ISSUES** menu, select **Return and issue keys**

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](#)⁹⁴.

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](#)¹⁰²).

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](#)¹⁰³).

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](#)⁹⁴.

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 from the drop down list (See [Issue and return reasons](#)¹³⁹). The reason is optional.

Issue time and reason

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

Enter a return **reason** or select one from the drop down list (See [Issue and return reasons](#)¹³⁹). The reason is optional.

Enter an **authorised by** name or select one from the drop down list (See [Authorisation names](#)¹³⁹). The authorised by name is optional.

When must the keys be returned

The return date and time is calculated from the settings for the corresponding [Key holder category](#)¹³⁶. 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 the report [Key return confirmation](#)¹²⁴).

Choose if you want to notify the key holders by email. If you choose the email option, you may choose to show the email window before sending, you may alter the key holder's email address and also change the email message. The default email message is determined by the [key holder category](#)¹³⁶.

Options - new key holder

Choose if you want to print a key issue confirmation report (See the report [Key issue responsibility acceptance](#)¹²³). 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 [Finding issued keys by packet](#)⁸⁵). If you choose to print a packet label, [Packet printing options](#)¹⁰³ become available an option 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 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](#)¹³⁶.

Authentication

Choose how the key holder will accept the keys. Premium edition only.

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 ¹⁰¹
The key holder will enter their password	The user will enter their password. An option is provided for changing password. See Authenticating key issue by password ¹⁰²
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 ¹⁰²

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.

8.15.5 Authenticating key issue by signed form

Premium edition only.

See the topic [Issuing keys and key bunches](#)¹⁹⁵ 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](#)¹⁴²

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

Load from file

Select the file to load. If you load a PDF file, no further actions 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](#)¹⁴²

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

8.15.6 Authenticating key issue by password

Premium edition only.

See the topic [Issuing keys and key bunches](#)⁹⁵ 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](#)¹⁰²

8.15.7 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.

8.15.8 Authenticating key issue by signature pad

Premium edition only.

See the topic [Issuing keys and key bunches](#)⁹⁵ 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.

8.15.9 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.

8.15.10 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.

8.15.11 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.

8.15.12 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.

8.15.13 Packet printing options

Packet printing options are available if you choose to print a key issue packet (See [Issuing keys and key bunches](#)⁹⁵)

- Choose the label size you are using from the drop down list.
- Choose what to print on the label.
- Click **OK** to save the choices.

Designing your own label layout

You may use the label designer to create a label layout of your own and to match your label size.

- Click **Design labels**
- The **Custom Reports: Packet label** window is shown
- Use the **Add, Remove** and **Edit** buttons to set up your labels.

First steps

Measure your labels accurately. You need the width and height.

On your windows printer driver, define a paper size with the exact dimensions you measured. If you do not do this then Windows will not align the data correctly when printing.

Adding a label layout

- Click **Add**

- Enter a **description** for your label layout then click **Edit report**.

The report designer is shown.

Setting the paper size

- Choose **File** then **Page setup**.
- Set the paper size and margins correctly.
- Click **OK**
- Now set the height of the detail band to be 0.1mm less than the label height - the top margin - the bottom margin. The 0.1mm is important to ensure that pages are not overrun resulting in endless labels being printed.

Testing the paper size and margins

Before creating the label layout we will test that the margins are ok.

Drop a shape (leave it as a rectangle) in the detail band and move/size it to fill the entire detail band but no more.

Preview the label (Preview tab) and print a single page.

If all edges of the rectangle print correctly then you can continue with your label layout, otherwise you will need to adjust the margins and try again.

When the margin test is done, delete the rectangle from the report.

Laying out the label

Place Label and DBText elements on the label, and for each adjust the size, location font size etc.

For DBText elements, use the drop-down (next to the "Pipe" dropdown) to choose the data field for the DBText to display

Finishing

Close the label layout editor.

Click **OK** to save the custom label, then select it from the list of label sized and click **OK** to save the options.

8.15.14 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

- 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.

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](#)⁸⁴).

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 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](#)³⁶.

Ready to finish

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

8.15.15 Remove pre-issue keys

Premium edition only.

This procedure is used to remove pre-issue key emails that have not been issued (e.g. More than several weeks old so you are removing the pre-issue authority).

Getting started

- From the **ISSUES** menu, select the drop down below **Pre-issue keys email** and choose **Remove pre-issue keys**.

Making a change

Pre-issue keys selection

There are choices for how the key holders will be selected and for the date range to include.

Pre-Issue keys

The matching pre-issue keys emails are shown and you can deselect any that you do not want to remove.

Ready to finish

A summary is displayed

Enter the confirmation requested.

Click **Finish** to remove the pre-issue key emails.

8.16 Reporting

8.16.1 Printer options

Most reports allows you to access printer options by clicking on the **Printer options** link on the bottom left of the report options screen.

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 printing**, 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.

8.16.2 Keys

Getting started

- From the **REPORTS** menu, choose **Keys**.

Range

The range specifies the set of data that will included in the report. Here is an explanation of the range choices:

Range	Description
Which keys do you want to include?	<p>All: All keys are printed.</p> <p>All keys in a system: You must select a system. All keys in the system are printed.</p> <p>Keys issued to a key holder: You must select a key holder. All keys issued to that key holder are printed.</p> <p>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.</p> <p>A selection of keys: You select the keys to be included on the report.</p>

Options

Option	Description
Show doors	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

See [Printer options](#)¹⁰⁵ for printer specific choices.

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 ¹⁴³ for more information.
Email	The report is sent via email as a PDF attachment.

8.16.3 Key hierarchy

Getting started

- From the **REPORTS** menu, select the drop down below **Keys** and choose **Key hierarchy**.

Range

The range specifies the set of data that will included in the report. Here is an explanation of the range choices:

Range	Description
Which system do you want to include?	You must select a system. All keys in the system are printed.

Options

Option	Description
Show key descriptions	When selected, each key will be followed by its description.

Producing the report

See [Printer options](#)¹⁰⁵ for printer specific choices.

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 ¹⁴³ for more information.
Email	The report is sent via email as a PDF attachment.

8.16.4 Signatory key authorities

Getting started

- From the **REPORTS** menu, select the drop down below **Keys** and choose **Signatory key authorities**.
- If you have multiple systems you will now be asked to select one.

Range

The range specifies the set of data that will included in the report. Here is an explanation of the range choices:

Range	Description
Which information do you want to include in this report	<p>All: All keys and active signatories are printed.</p> <p>A selection of signatories: You select the signatories to include in the report. All keys are shown.</p> <p>A selection of keys: You select the keys to be included on the report. All active signatories are shown.</p>

Options

Option	Description
--------	-------------

Show keys that are not used by any signatories	Determines if unassigned keys are shown. If you are using the report to gather information on permissions then likely you want this on, however if the report is to convey information about the current permissions then having this off may be useful in reducing the amount of information shown.
Show signatories that are not used by any keys	Determines if unassigned signatories are shown. Particularly useful in reducing the size of the report when only a few keys are selected for the report.
Show signatory title	Includes the signatory title after each signatory. This results in fewer signatories per page.

Notes

Large systems may require a number of pages to be joined together sideways as well as vertically. When you preview the report, one vertical section is shown at a time.

Producing the report

See [Printer options](#)¹⁰⁵ for printer specific choices.

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 ¹⁴³ for more information.
Email	The report is sent via email as a PDF attachment.

8.16.5

Doors

Getting started

- From the **REPORTS** menu, choose **Doors**.

Range

The range specifies the set of data that will included in the report. Here is an explanation of the range choices:

Range	Description
Which doors do you want to include in this report	<p>All doors: All doors are printed.</p> <p>All doors in a system: You must select a system. All doors in the system are printed.</p> <p>A selection of doors: You must select the doors to print by using the Select doors and Remove door links.</p> <p>Doors in an area: You must select an area.</p> <p>Doors that fit a selection of keys: You select one or more keys and all doors that are operated by any of those keys are included on the report.</p> <p>Doors accessible by a key holder: You must select a key holder. All doors accessed by keys issued to that key holder are printed.</p>

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.

Print building plans

When you have "Plan" PDF documents loaded, and the user has permissions (See [Security groups](#)¹⁴³) then there is a drop down list to select a building plan document and an associated print button.

See [Documents](#)⁷⁹ 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

Option	Description
Layout	<p>The layout determines the type of report that is produced.</p> <p>Doors: Shows doors and associated information, but not keys.</p> <p>Doors with keys: Shows doors and associated information, and after each door shows the keys that operate the door.</p> <p>Doors with door hardware: Shows doors and for each door the hardware that is recorded for the door.</p>
Show door stamping	Shows door stamping on the report.
Show door notes	Shows notes associated with each door.
Show key holders	Shows key holders who have access to each door.

Producing the report

See [Printer options](#)¹⁰⁵ for printer specific choices.

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 ¹⁴³ for more information.
Email	The report is sent via email as a PDF attachment.

8.16.6 Keying matrix

This report shows a matrix of doors and keys, with intersection points indicating the keys that operate each door.

Getting started

- From the **REPORTS** menu, select the drop down below **Doors** and choose **Keying matrix**.

Range

The range specifies the set of data that will included in the report. Here is an explanation of the range

choices:

Range	Description
Which doors do you want to include in this report	<p>All doors: All doors are printed.</p> <p>All doors in a system: You must select a system. All doors in the system are printed.</p> <p>A selection of doors: You select the doors to be included on the report.</p> <p>Doors in an area: Select an area. Doors in that area are included on the report.</p> <p>Doors that fit a selection of keys: You select one or more keys and all doors that are operated by any of those keys are included on the report.</p> <p>Doors accessible by a key holder: You must select a key holder. All doors accessed by keys issued to that key holder are printed.</p> <p>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.</p>

Print building plans

When you have "Plan" PDF documents loaded, and the user has permissions (See [Security groups](#)⁴³) then there is a drop down list to select a building plan document and an associated print button.

See [Documents](#)⁷⁹ 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

Option	Description
Show door description	Shows the door description - results in fewer doors per page.
Show door area	Shows the door area - results in fewer doors per page.
Show key description	Shows the key description - results in fewer keys per page.
Show key category	Shows the key category - results in fewer keys per page.
Include deleted keys	Choose if deleted keys are included or not.
Show keys not used by selected doors	Shows all keys instead of only those required for the doors being printed.
Show unkeyed indicator	Shows a warning graphic next to each door and key that is not assigned any keying.
Print on large paper	Prints more doors and keys per page. Useful if you have a large format printer. The other thing is that many modern printers will automatically resize A3 content to A4 if the printer does not support the larger paper - the result if this is more doors and keys per page and somewhat smaller writing which is agreeable only to younger eyes!

Notes

Large systems may require a number of pages to be joined together sideways as well as vertically. When you preview the report, one vertical section is shown at a time.

Producing the report

See [Printer options](#)¹⁰⁵ for printer specific choices.

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 ¹⁴³ for more information.
Email	The report is sent via email as a PDF attachment.

8.16.7 Signatory door authorities

Getting started

- From the **REPORTS** menu, select the drop down below **Doors** and choose **Signatory door authorities**.
- If you have multiple systems you will now be asked to select one.

Range

The range specifies the set of data that will included in the report. Here is an explanation of the range choices:

Range	Description
Which information do you want to include in this report	<p>All: All doors and active signatories are printed.</p> <p>A selection of signatories: You select the signatories to include in the report. All doors are shown.</p> <p>A selection of doors: You select the doors to be included on the report. All active signatories are shown.</p>

Options

Option	Description
Show doors that are not used by any signatories	Determines if unassigned doors are shown. If you are using the report to gather information on permissions then likely you want this on, however if the report is to convey information about the current permissions then having this off may be useful in reducing the amount of information shown.
Show signatories that are not used by any doors	Determines if unassigned signatories are shown. Particularly useful in reducing the size of the report when only a few doors are selected for the report.
Show signatory title	Includes the signatory title after each signatory. This results in fewer signatories per page.

Notes

Large systems may require a number of pages to be joined together sideways as well as vertically. When you preview the report, one vertical section is shown at a time.

Producing the report

See [Printer options](#)¹⁰⁵ for printer specific choices.

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 ¹⁴³ for more information.
Email	The report is sent via email as a PDF attachment.

8.16.8 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

- From the **REPORTS** menu, choose **Key holders**.

Range

The range specifies the set of data that will included in the report. Here is an explanation of the range choices:

Range	Description
Which key holders do you want to include	<p>All key holders: All key holders that have keys on issue are printed.</p> <p>A selection of key holders: You select the key holders to be included on the report.</p> <p>All key holders in a category: You must select a key holder category.</p> <p>All key holders in a company: You must select a company name.</p> <p>All key holders who have keys for a system: You must select a system.</p>

Options

Option	Description
Show door information	Shows doors that are currently accessible for each key holder.
Include keys that have been returned	As well as showing keys currently on issue, this choice includes keys 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 the key holder phone	Shows the key holder phone on the report.
Show the key holder address	Shows the key holder address on the report.
Show the key holder security card	Shows the key holder security card on the report.

Producing the report

See [Printer options](#)¹⁰⁵ for printer specific choices.

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 ¹⁴³ for more information.
Email	The report is sent via email as a PDF attachment.

8.16.9 Key cabinet

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

- From the **REPORTS** menu, choose **Key cabinet**.

Range

The range specifies the set of data that will included in the report. Here is an explanation of the range choices:

Range	Description
System	Choose all systems or select a single system.
Cabinet	Choose all key cabinets or select a single key cabinet.

Options

Option	Description
Layout	<p>By key: Key bunches that fit the range are shown first, followed by every key that fits the range (with information about issue numbers)</p> <p>By hook: Each hook is shown followed by a list of key bunches, keys and corresponding issue numbers for keys on the hook.</p>

Producing the report

See [Printer options](#)¹⁰⁵ for printer specific choices.

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 ¹⁴³ for more information.
Email	The report is sent via email as a PDF attachment.

8.16.10 Key quantity 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

- From the **REPORTS** menu, select the drop down below **Key cabinet** and choose **Key quantity by status**.

Range

The range specifies the set of data that will included in the report. Here is an explanation of the range choices:

Range	Description
System	Choose all systems or select a single system.

Notes

Large systems may require a number of pages to be joined together sideways as well as vertically. When you preview the report, one vertical section is shown at a time.

Producing the report

See [Printer options](#)¹⁰⁵ for printer specific choices.

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 ¹⁴³ for more information.
Email	The report is sent via email as a PDF attachment.

8.16.11 Key bunch list

Getting started

- From the **REPORTS** menu, choose **Key bunches**.
- This report can be accessed from [Key bunches](#)⁸⁵ also.

Range

The range specifies the set of data that will 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

See [Printer options](#)¹⁰⁵ for printer specific choices.

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 ¹⁴³ for more information.

	more information.
Email	The report is sent via email as a PDF attachment.

8.16.12 Key bunch

See the topic [Key bunches](#)⁸⁵ to learn about accessing this report.

Range

The selected key bunch is the one included in the report.

Options

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

See [Printer options](#)¹⁰⁵ for printer specific choices.

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 ¹⁴³ for more information.
Email	The report is sent via email as a PDF attachment.

8.16.13 Overdue keys

This report shows each key holder with overdue keys and a list for each key holder of those keys and key bunches.

Getting started

- From the **REPORTS** menu, choose **Overdue keys**.
- This report can be accessed from [Overdue key issues](#)⁹¹ also.

Range

The range specifies the set of data that will included in the report. Here is an explanation of the range choices:

Range	Description
System	Choose all systems or select a single system.
Cabinet	Choose all key cabinets or select a single key cabinet.
Time	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 Overdue key issues ⁹¹ when accessed from that screen.

Producing the report

See [Printer options](#)¹⁰⁵ for printer specific choices.

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 ¹⁴³ for more information.
Email	The report is sent via email as a PDF attachment.

8.16.14 Lost and broken keys

This report gives a list of keys that have been lost or broken, including information on the key holder who made the loss. In the Premium edition you may specify the risk level to include.

Getting started

- From the **REPORTS** menu, choose **Lost and broken keys**.

Range

The range specifies the set of data that will included in the report. Here is an explanation of the range choices:

Range	Description
System	Choose all systems or select a single system.
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.

Options

Option	Description
Show lost keys	Shows lost keys on the report.
Show broken keys	Shows broken keys on the report
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.
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 the 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

See [Printer options](#)¹⁰⁵ for printer specific choices.

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 ¹⁴³ for more information.
Email	The report is sent via email as a PDF attachment.

8.16.15 Lost key form

This report produces paperwork to document the loss of keys with a signature from the key holder.

Getting started

- From the **REPORTS** menu, select the drop down below **Lost and broken keys** and choose **Lost key form**.

Range

The range specifies the set of data that will 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 (They must have keys on issue). Initially the key holder selection window is displayed, or you may access it again by clicking the Select button.

Options

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.
Date and time lost	You may enter this information, if known, to pre-populate this field on the form.
Where was the key lost	You may enter this information, if known, to pre-populate this field on the form.

Producing the report

See [Printer options](#)¹⁰⁵ for printer specific choices.

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 ¹⁴³ for more information.
Email	The report is sent via email as a PDF attachment.

8.16.16 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

- From the **REPORTS** menu, choose **Compromised doors**.

Range

The range specifies the set of data that will included in the report. Here is an explanation of the range choices:

Range	Description
System	Choose all systems or select a single system.

Options

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

See [Printer options](#)¹⁰⁵ for printer specific choices.

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 ¹⁴³ for more information.
Email	The report is sent via email as a PDF attachment.

8.16.17 Orders by status

This report lists key orders with information about each order.

Getting started

- From the **REPORTS** menu, choose **Orders**.

Range

The range specifies the set of data that will included in the report. Here is an explanation of the range choices:

Range	Description
System	Choose all systems or select a single system.

Options

Option	Description
Which job status do you want to	Use these 4 options to control the job status that will be included in the report.

Producing the report

See [Printer options](#)¹⁰⁵ for printer specific choices.

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 ¹⁴³ for more information.
Email	The report is sent via email as a PDF attachment.

8.16.18 Signature change 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

- From the **REPORTS** menu, select the drop down below **Orders** and choose **Signature change form**.
- If you have multiple systems you will now be asked to select one. 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

See [Printer options](#)¹⁰⁵ for printer specific choices.

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 ¹⁴³ for more information.
Email	The report is sent via email as a PDF attachment.

8.16.19 Key order history

This report lists keys with information about each order.

Getting started

- From the **REPORTS** menu, choose **Key order history**.

Range

The range specifies the set of data that will included in the report. Here is an explanation of the range choices:

Range	Description
Which keys do you want to include	<p>All keys: All keys are printed.</p> <p>All keys in a system: You must select a system. All keys in the system are printed.</p> <p>A selection of keys: You must select the keys to print.</p>

Producing the report

See [Printer options](#)¹⁰⁵ for printer specific choices.

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 ¹⁴³ for more information.
Email	The report is sent via email as a PDF attachment.

8.16.20 Key issue activity

This report gives you a look at "what's been going on".

Getting started

- From the **REPORTS** menu, choose **Key issue activity**.

Range

The range specifies the set of data that will included in the report. Here is an explanation of the range choices:

Range	Description
Which keys do you want to include	<p>All keys: All keys are printed.</p> <p>All keys in a system: You must select a system.</p> <p>Keys issued to a key holder: You must select a key holder. All keys issued to that key holder are printed.</p> <p>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.</p> <p>A selection of keys: You must select the keys to print.</p> <p>Keys issued or returned by a user: You must select the user.</p>
Date range	Select the date range to be included in the report.

Producing the report

See [Printer options](#)¹⁰⁵ for printer specific choices.

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 ¹⁴³ for more information.
Email	The report is sent via email as a PDF attachment.

8.16.21 Fees

Premium edition only.

This report shows fees taken and refunded.

Getting started

- From the **REPORTS** menu, choose **Fees**.

Range

The range specifies the set of data that will included in the report. Here is an explanation of the range choices:

Range	Description
Which keys do you want to include	<p>All keys: All keys are printed.</p> <p>All keys in a system: You must select a system.</p> <p>Keys issued to a key holder: You must select a key holder. All keys issued to that key holder are printed.</p> <p>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.</p> <p>A selection of keys: You must select the keys to print.</p> <p>Keys issued or returned by a user: You must select the user.</p>
Date range	Select the date range to be included in the report.

Options

Option	Description
Date is	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

See [Printer options](#)¹⁰⁵ for printer specific choices.

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 ¹⁴³ for more information.
Email	The report is sent via email as a PDF attachment.

8.16.22 Pre-issue emails

Premium edition only.

This report shows pre-issue emails sent.

Getting started

- From the **REPORTS** menu, choose **Pre-issue keys emails**.

Range

The range specifies the set of data that will included in the report. Here is an explanation of the range choices:

Range	Description
Which pre-issues do you want to include	<p>All pre-issue email: All items are printed.</p> <p>Pre-issues to a key holder: You must select a key holder. All pre-issues to that key holder are printed.</p> <p>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.</p> <p>Pre-issues by a user: You must select the user.</p>
Date range	Select the date range to be included in the report.

Producing the report

See [Printer options](#)¹⁰⁵ for printer specific choices.

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 ¹⁴³ for more information.
Email	The report is sent via email as a PDF attachment.

8.16.23 Custom reports

Premium edition only. Separately licensed feature.

This is where you print reports that you have designed yourself.

Getting started

- From the **REPORTS** menu, choose **Your reports** then
- **Your system reports** for reports where a system selection is required (e.g. a report about keys).
- **Your admin reports** for reports where a system selection is not required (typically summary or administration reports).

Range

The range specifies the set of data that will included in the report. Here is an explanation of the range choices:

Range	Description
System	Select a single system (for system reports, not for admin reports)

Select the report that you want to print.

See [Design custom reports](#)¹²³ for information about creating reports.

Producing the report

See [Printer options](#)¹⁰⁵ for printer specific choices.

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 ¹⁴³ for more information.
Email	The report is sent via email as a PDF attachment.

8.16.23.1 Design custom reports

Premium edition only. Separately licensed feature.

This is where you design your own reports.

Getting started

- From the **REPORTS** menu, choose **Your reports** then
- **Design custom system reports** to design reports where a system selection is required (e.g. a report about keys).
- **Design custom admin reports** to design reports where a system selection is not required (typically summary or administration reports).

Making a change

- Use the **Add**, **Remove** and **Edit** buttons to set up your reports.

8.16.24 Key issue responsibility acceptance

This report is produced when issuing keys, or see the topic [Key holders](#)⁹² to learn about accessing this report at other times.

The text printed on this report is set by the key holder category that is assigned to the key holder.

Range

The range specifies the set of data that will included in the report. Here is an explanation of the range choices:

Range	Description
Date range	Choose when the keys were issued.

Options

Option	Description
Show area for signature	Includes an area for the report to be signed by the key holder.
Show key description	Shows the description of each key.
Show reason	Shows the reason recorded for the key issue.
Show authorised by	Shows the name of the authorising person recorded for the key issue.
Show key bunch keys	When a bunch is issued, shows the keys in the bunch.
Show card no. and proximity	Shows the card number and proximity card number assigned to the key holder.
Show key holder email	Shows the key holder email address.
Show fee	Premium edition only. Shows the fee taken for each key.

Producing the report

See [Printer options](#)¹⁰⁵ for printer specific choices.

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 ¹⁴³ for more information.
Email	The report is sent via email as a PDF attachment.

8.16.25 Key return confirmation

This report is produced when returning keys, or see the topic [Key holders](#)⁹² to learn about accessing this report at other times.

The text printed on this report is set by the key holder category that is assigned to the key holder.

Range

The range specifies the set of data that will included in the report. Here is an explanation of the range choices:

Range	Description
Date range	Choose when the keys were returned.

Options

Option	Description
Show key description	Shows the description of each key.
Show reason	Shows the reason recorded for the key return.
Show overdue description	Shows information about the key being overdue.
Show key bunch keys	When a bunch is returned, shows the keys in the bunch.
Show key holder email	Shows the key holder email address.
Show fee	Premium edition only. Shows the fee taken for each key.
Show refund authorisation	Premium edition only. Includes an area for the refund of key deposits to be authorised.

Producing the report

See [Printer options](#)¹⁰⁵ for printer specific choices.

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 ¹⁴³ for more information.
Email	The report is sent via email as a PDF attachment.

8.16.26 Key holder signing

This report is produced by clicking on the **Print** link below the key issue text in the [Key issue holding](#)⁸⁴ window.

The text and signature for the signing is printed, along with the keys associated with the signing.

Producing the report

See [Printer options](#)¹⁰⁵ for printer specific choices.

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 ¹⁴³ for more information.
Email	The report is sent via email as a PDF attachment.

8.16.27 Key order

This report is produced from an order. See the topic [Entering orders](#)⁸⁰ to learn about accessing this report.

Producing the report

See [Printer options](#)¹⁰⁵ for printer specific choices.

Output options

Option	Description
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Print	The report is printed to the printer you have selected.
Preview	The report is previewed on your screen. See Previewing reports ¹⁴³ for more information.
Email	The report is sent via email as a PDF attachment.

8.17 Importing data

8.17.1 Import key holders

If you have a CSV file with key holder information you can import this data.

Read the topic [Key holder import \(CSV\) file format](#)¹³⁸ for more information on the file contents allowed.

If employee number is treated as the primary search field (See [Application parameters](#)³³) 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).

Getting started

- From the **FILE** menu, select **Import** then **Import key holders**.

Importing data

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 four 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 items, if you are updating existing items, 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 any 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, or if you are happy to ignore the erroneous rows then you can check the option to skip those rows.

Data remapping

Values for **Key holder category** in the import file need to be matched to the key holder categories in your database.

Any values that match existing information are mapped automatically and you will see on those lines the **Value from database** will be completed. For all lines where the **Value from database** is blank, you must: Click the line then choose the correct value from the **Use value** drop down list, then click the **Set** button to set that value for the line you are working on. Repeat this process for all incomplete lines. If you make a mistake simply repeat the process on the erroneous line to alter it.

- Click **Next**

Ready to finish

A summary is displayed.

Click **Finish** to perform the import.

8.17.2 Import keys on issue

If you have a CSV file with key issue holding information you can import this data.

Read the topic [Keys on issue import \(CSV\) file format](#)¹³⁷ for more information on the file contents allowed.

If employee number is treated as the primary search field (See [Application parameters](#)³³) then employee number is used for locating key holders, otherwise the combination of First names, last name and company is used for locating key holders).

Getting started

- From the **FILE** menu, select **Import** then **Import keys on issue**.

Importing data

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 four 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 any 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, or 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.

8.17.3 Import key issue stamping

Premium edition only. Key issue stamping is a separately licensed feature.

If you have a CSV file with key issue stamping information you can import this data.

Read the topic [Key issue stamping import \(CSV\) file format](#)¹⁴¹ for more information on the file contents allowed.

Getting started

- From the **FILE** menu, select **Import** then **Import key issue stamping**.

Importing data

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 four 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 any 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, or 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.

8.18 Exporting data

8.18.1 Export key holders

Key holders may be exported and imported via csv files.

Getting started

- From the **FILE** menu, select **Export** then **Export key holders**.

Exporting data

A simple wizard steps you through the process of choosing where the data will be written, choosing which data to export and choosing export options.

- Choose the file name for the export.
- You may choose a key holder category, or all.
- You may choose to include only active key holders.
- You may choose to include only key holders with keys currently on issue
- Choose if you want headings in the export (highly recommended)
- Click **Finish** to perform the export.

8.18.2 Export keys on issue

Information about all keys on issue including the key holder and issue time etc may be exported.

The export file produced may then be used in other applications or with Microsoft Excel to perform further analysis.

Getting started

- From the **FILE** menu, select **Export** then **Export keys on issue**.

Exporting data

A simple wizard steps you through the process of choosing where the data will be written, choosing which data to export and choosing export options.

- Choose the file name for the export.
- You may choose a system, or all.
- You may choose how to handle keys that are in a bunch.
- Choose if you want headings in the export (highly recommended)
- Click **Finish** to perform the export.

Notes

The fields exported depend on the product edition (Premium or Basic) and a variety of [Application parameters](#)³³.

8.18.3 Export key bunches on issue

Information about all key bunches on issue including the key holder and issue time etc may be exported.

The export file produced may then be used in other applications or with Microsoft Excel to perform further analysis.

Getting started

- From the **FILE** menu, select **Export** then **Export key bunches on issue**.

Exporting data

A simple wizard steps you through the process of choosing where the data will be written and choosing export options.

- Choose the file name for the export.
- Choose if you want headings in the export (highly recommended)
- Click **Finish** to perform the export.

8.18.4 Export key holder door access

Information about all doors that can be accessed by key holders may be exported. Optionally, key issue information may be included.

The export file produced may then be used in other applications or with Microsoft Excel to perform further analysis.

Getting started

- From the **FILE** menu, select **Export** then **Export key holder door access**.

Exporting data

A simple wizard steps you through the process of choosing where the data will be written, choosing which data to export and choosing export options.

- Choose the file name for the export.
- You may choose a system, or all.
- You may choose if you want just door-key holder information or if you want the information about each key issue included.
- Choose if you want headings in the export (highly recommended)
- Click **Finish** to perform the export.

Notes

The fields exported depend on the product edition (Premium or Basic) and a variety of [Application parameters](#)³³.

8.18.5 Export data for all key issues

Information about all key issues may be exported.

The export file produced may then be used in other applications or with Microsoft Excel to perform further analysis.

Getting started

- From the **FILE** menu, select **Export** then **Export data for all key issues**.

Exporting data

A simple wizard steps you through the process of choosing where the data will be written, choosing which data to export and choosing export options.

- Choose the file name for the export.
- You may choose a system, or all.
- Choose if you want headings in the export (highly recommended)
- Click **Finish** to perform the export.

Notes

The fields exported depend on the product edition (Premium or Basic) and a variety of [Application parameters](#)³³ and if you have [Key cabinets](#)⁴¹ configured.

8.18.6 Export doors and keys

Doors, keys and keying information may be exported.

Getting started

- From the **FILE** menu, select **Export** then **Export doors and keys**.

Exporting data

A simple wizard steps you through the process of choosing where the data will be written, choosing which data to export and choosing export options.

- Choose the file name for the export.
- You must choose a system.
- Choose the types of exports you want (Doors, keys, keying)
- You may choose to include inactive data (e.g. keys that have been marked as deleted or disabled)
- Choose if you want headings in the export (highly recommended)
- Click **Finish** to perform the export.

8.18.7 Export key issue stamping

Premium edition only. Key issue stamping is a separately licensed feature.

Key issue stamping may be exported and imported via csv files.

Getting started

- From the **FILE** menu, select **Export** then **Export key issue stamping**.

Exporting data

A simple wizard steps you through the process of choosing where the data will be written, choosing which data to export and choosing export options.

- Choose the file name for the export.
- You may choose a system, or all.
- You may choose to include only key issues without a key issue stamping.
- Choose if you want headings in the export (highly recommended)
- Click **Finish** to perform the export.

Appendix

Part



9

9 Appendix

9.1 Diagnostic functions

9.1.1 Diagnose database 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

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

Resolve host

Premium edition only. 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

Premium edition only. 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.

Test port

Premium edition only. This test attempts to open a socket on the host machine 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. This is the only test for the Basic edition.

Test license server port

Premium edition only. This test attempts to open a socket on the host machine on the port used for the license server. This test must succeed otherwise there is a problem.

9.1.2 Fixing internal numbering

Internally, ProMaster Key Manager tracks and identifies 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 **Internal synchronize**
- 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.

9.2 File formats used by ProMaster Key Manager

This section gives an overview of the CSV file format and describes each of the CSV files that are used for importing data.

9.2.1 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)
- Additionally, each line must contain the same number of fields as the first line of the file. Exercise caution using programs like Excel that will modify a perfectly readable csv file and remove trailing delimiters thereby making a different number of fields on each line. Before saving from Excel, the addition of a column containing arbitrary data (e.g. a single letter) as the rightmost column avoids this problem in Excel and when importing the data file into ProMaster Key Manager that rightmost column can be ignored just like any other column that you do not require.

ProMaster Key Manager is Unicode capable and will detect the file format being imported if it includes the standard preamble characters to designate the file as UTF-8, UTF-16BE or UTF16LE. If the preamble characters are not present for one of these three formats then the data file will be treated as an ASCII file.

ProMaster Key Manager exports CSV data in UTF-8 format (including the preamble) unless the export is for a specific purpose where only ASCII would be possible.

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.

9.2.2 Key holder data file formats

9.2.2.1 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](#)¹³⁵.

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 file is not important as the ProMaster Key Manager CSV import 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 (100)	No*	company	Required if employee number is not treated as the primary search field
Description	Character (200)	No	description	
Address 1	Character (30)	No	address1	
Address 2	Character (30)	No	address2	
Address 3	Character (30)	No	address3	
Address 4	Character (30)	No	address4	
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 (250)	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	
Active	Boolean, False being one of 'F', 'False', '0', 'N', 'No' and True being one of 'T', 'True', '1', 'Y', 'Yes'	No	active	

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.

9.2.2.2 Keys on issue 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 [CSV file format definition](#)¹³⁵.

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 file is not important as the ProMaster Key Manager CSV import 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*	employeeeno	Required if employee number is treated as the primary search field.
Company	Character (100)	No*	company	Required if employee number is not treated as the primary search field.
System	Character (20)	Yes	system	
Key	Character (20)	Yes	key	
Issue number	Numeric 1..10000000	Yes	issuenumbr	The combination of System, Key and Issue number must represent a key that exists, is on hook and is not part of a key bunch.
Issue time	Data / time	Yes	issuetime	Must contain a valid date and time when the key was issued.
Issue reason	Character (200)	Yes	issuereason	Field is required in the import but may contain a blank value.
Return by time	Data / 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. 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	Data / time	No	deposittime	Premium edition only. 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. 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. Meaningful only if Deposit amount field is specified and Deposit amount is valid.

9.2.3 System data file formats

9.2.3.1 Key import (CSV) file format

ProMaster Key Manager provides a wizard for importing key 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](#)¹³⁵.

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 file is not important as the ProMaster Key Manager CSV import 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
Key	Character (20), upper case	Yes	keynumber	Unique.
Description	Character (200)	No	keydescription	
Category	Character (50)	No	category	
Key above	Character (20), upper case	No	keyabove	Must be the key number of a master key that already exists within this system, or is in the file being imported.
Designation	Character (1)	No	designation	Must be one of the following values: M = Master Key S = Selective Key C = Change Key Z = Control
Colour 1	Character	No	colour1	Length is not important as the value provided gets mapped onto existing key holder category values.
Colour 2	Character	No	colour2	Length is not important as the value provided gets mapped onto existing key holder category values.
Colour 3	Character	No	colour3	Length is not important as the value provided gets mapped onto existing key holder category values.
Signatories	Numeric, 0..999	No	signatories	
Risk category	Numeric 0..5	No	risk	Premium edition only.
Default key cabinet	Character	No	keycabinet	Premium edition only. Length is not important as the value provided gets mapped onto existing key holder category values
Notes	Character (200)	No	notes	

9.2.3.2 Door import (CSV) file format

ProMaster Key Manager provides a wizard for importing door 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](#)¹³⁵.

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 file is not important as the ProMaster Key Manager CSV import 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
Door	Character (20), upper case	Yes	doornumber	Unique.
Stamping	Character (20), upper case	No	stamping	
Description	Character (200)	No	doordescription	
Area	Character (200)	No	area	
Stage	Character (50)	No	stage	
Door height	Character (20)	No	doorheight	
Door width	Character (20)	No	doorwidth	
Door thickness	Character (20)	No	doorthickness	
Signatories	Numeric, 0..999	No	signatories	
Notes	Character (200)	No	notes	
Different keying side 2	Boolean, see above	No	differentkeyingside2	Defaults to false

9.2.3.3 Keying import (CSV) file format

ProMaster Key Manager provides a wizard for importing keying 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](#)¹³⁵.

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 file is not important as the ProMaster Key Manager CSV import 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
Key	Character (20), upper case	Yes	keynumber	
Door number	Character (20), upper case	Yes	doornumber	
Position	Character (1)	No	positiontype	If not used, defaults to E for external. Values allowed are: E = External I = Internal External is the normal keying for a door. Internal keying is permitted only when the door is flagged as having different internal keying.

9.2.3.4 Key issue stamping import (CSV) file format

Premium edition only. Key issue stamping is a separately licensed feature.

ProMaster Key Manager provides a wizard for importing key issue stamping 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](#)¹³⁵.

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 file is not important as the ProMaster Key Manager CSV import 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
System	Character (20), upper case	Yes	systemnumber	Combination of System + Key + Issue number must be unique.
Key	Character (20), upper case	Yes	keynumber	
Issue number	Numeric 1..10000000	Yes	issuenummer	
Key issue stamping	Character (20), upper case	Yes	stamping	

9.3 Miscellaneous information

9.3.1 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 lock photos and document images.

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 pre-set for that image purpose then you are prompted to resize them image. 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. The image aspect ratio is maintained.
- Quickly set the **Preferred size**.

The status bar at the bottom of the image editor shows you the image dimensions and the image format.

Toolbar options

Option	Description
Editing Undo	Undo the last change you made to the picture.
Editing Redo	Reapply the last undo you made to the picture.
Editing Reload	Undo all changes you have made to the picture, reverting to the picture you started with.
Select Select all	Selects the whole image
Select Select none	Removes the selection
Select Select rectangle tool	Use the mouse to make a selection on the image.
Select Select ellipse tool	Use the mouse to make a selection on the image.
Select Select lasso tool	Use the mouse to make a freehand selection on the image.
Select Select magic wand tool	Use the mouse to make a selection on the image. This tools works best with pictures with clearly defined areas.
Image Flip horizontal	Flip the picture horizontally.
Image Flip vertical	Flip the picture vertically.
Image Rotate left 90	Rotate the picture left by 90 degrees.
Image Rotate right 90	Rotate the picture right by 90 degrees.
Image Decrease brightness	Decrease the brightness of the picture.
Image Increase brightness	Increase the brightness of the picture.
Image Decrease contrast	Decrease the contrast of the picture.

Image Increase contrast	Increase the contrast of the picture.
Image Sharpen	Sharpen the picture.
Image Blur	Blur the picture.
Image Crop	Crop the picture, leaving just the area you have selected with your mouse.
Image Clear selection	Clears the area you have selected with your mouse.
Zoom Full size	Show the picture at 100% resolution.
Zoom Fit to screen	Show the picture sized to fit the window
View Zoom in	Show the picture larger.
View Zoom out	Show the picture smaller.

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)
- Resize (To ensure the picture is the preferred size)

When you have finished your changes, click **OK** to save the picture.

9.3.2 Take photo

The signatory photo may be captured from a web cam (as well as being able to be loaded from an image file).

To take a photo while editing the signatory, click on the **Photo** tab then on **Camera**.

The **Camera** and **Size** lists show attached cameras and suitable size resolutions offered by the camera.

When you **Connect** to the camera the live camera view is shown. Click **OK** to take the photo when ready.

If you want to change **Size** or **Camera**, you must first **Disconnect**.

9.3.3 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.

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.

Page layout

Four buttons are available to change the way the pages are presented (Single page, Two pages side-by-side, Continuous and Two pages side-by-side continuous). The side-by-side layouts are useful for seeing two pages at a time on a larger display. In the continuous views the mouse wheel scrolls down the page(s) instead of jumping between pages as it does for a single page view.

9.3.4 Sending reports by email

Many reports may be sent by email rather than sending them to your printer.

When reports are sent by email, they are first generated as Adobe PDF files, then sent as attachments on the email.

There is an [Application parameter](#)³³ that determines if PDF files are generated using Unicode. Unicode is the default behaviour and should be changed only with a very good reason. Changing this parameter to ANSI will produce smaller PDF files, but any non-ASCII characters will then not appear correctly in the PDF.

By default, PDF files are encrypted to disallow changes to them. There is an [Application parameter](#)³³ that turns off encryption.

9.3.5 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

Enter the new password you want and confirm it by repeating it.

Click **OK**.

The registration code must be for the product registration used in this database. It does not have to be the current registration code (e.g. You have renewed support and updates, but not entered the new registration code), but it must be the same product registration that is in use for the database.

9.3.6 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, or a user with the permission 'Convert locksmith systems to user maintained systems'.

Premium edition, you must be running ProMaster Key Manager on the server, not from a workstation.

This feature may be unavailable if it is prohibited by your registration.

- From the **TOOLS** menu, select the item **Disassociate system from locksmith.**

Making a change

- Select the system to change.
- Enter the confirmation requested.
- Click **OK** to make the change.

9.3.7 Data interface service

Premium edition only.

Overview

The data interface service ("KM8IF") runs as a Windows service, and will import key holder information from a CSV file and also key system updates from your locksmith.

KM8IF 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 KM8IF.exe and is located with the main program on your server.

KM8IF 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 "local system") has permissions to the folders you have configured.

Command line options

Option	Description
<code>-help</code> or <code>-?</code>	Shows command line help
<code>-install</code>	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. When you run the program with the <code>-install</code> 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.

	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. 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, Address4, City, Sta
```

The order of the data fields in the file must match the header.

Example:


```
FirstName,LastName,EmployeeNo,Area,Category,Company,Address1,Address2,Address3,Address4,City,State,Zip,IsActive,Joe,Bloggs,100,,Full time employee,Bloggs Ltd,,,,,,,,,,,,,joe@bloggs.com,,Yes
```

See [CSV file format definition](#)¹³⁵ 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 ".km8". 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"

Version numbers

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10 Version numbers

The following table shows the various file format versions used in each product release version.

Product	Database	System Export/Import	Key order export
8.21301.0.0	8083	8000	8000
8.21001.0.0	8083	8000	8000
8.20802.0.0	8083	8000	8000
8.20801.0.0	8083	8000	8000
8.19902.1.0	8003	8000	8000
8.19901.0.0	8003	8000	8000
8.19701.0.0	8003	8000	8000
8.19601.0.0	8003	8000	8000
8.19401.0.0	8003	8000	8000
8.19201.0.0	8003	8000	8000
8.19103.0.0	8003	8000	8000
8.19102.0.0	8003	8000	8000
8.19101.1.0	8003	8000	8000
8.18702.0.0	8003	8000	8000
8.18701.0.0	8003	8000	8000
8.18502.0.0	8003	8000	8000
8.18501.0.0	8003	8000	8000
8.18305.0.0	8003	8000	8000
8.18304.0.0	8003	8000	8000
8.18303.0.0	8003	8000	8000
8.18302.1.0	8003	8000	8000
8.18301.0.0	8003	8000	8000
8.18201.1.0	8003	8000	8000
8.17601.0.0	8003	8000	8000
8.17501.0.0	8003	8000	8000
8.17401.0.0	8003	8000	8000
8.17201.0.0	8003	8000	8000
8.17102.0.0	8003	8000	8000
8.17101.0.0	8003	8000	8000
8.17003.0.0	8003	8000	8000
8.17002.0.0	8003	8000	8000
8.17001.0.0	8003	8000	8000

Summary of changes in updates

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11 Summary of changes in updates

Version 8.21301.0.0

Added access to "Lost keys" and "Broken keys" from the overdue keys window.

Fixed a minor issue in overdue keys where the next key issue was not correctly selected after returning or reissuing a key.

Version 8.21001.0.0

Fixed a problem recording lost and broken keys by key holder when the user logged in has no permissions to any key cabinets.

Version 8.20802.0.0

Added the ability to return a key from the Overdue Key window (if the user has the applicable permissions).

Added access to key holder details and key issue history from the Lost Key and Lost Bunch windows.

Added access to key holder details and key issue history from the Key Issue, Key Return and Key Issue And Return windows.

Version 8.20801.0.0

Added settings to the user preferences for using a proxy server with the publishing service when getting system updates from your locksmith.

Fixed a problem displaying a key holder mobile phone number on the key issue responsibility acceptance report.

Added email address to key issue responsibility acceptance report and key return confirmation report with an option on the report settings.

Added the ability to edit the key hook and cabinet from the Key Issues window when appropriate.

Version 8.19902.1.0

Premium edition only: When keys have been pre-issued, they may now not be issued to another key holder, or pre-issued to another key holder. This applies if the pre-issue is active - i.e., it has not been issued and has not expired (1 year from creation). This behaviour may be turned off by a new corresponding application parameter but this is not recommended as the new behaviour is an improvement.

Version 8.19901.0.0

Added an CSV export for "Key holder door access".

Version 8.19701.0.0

Fixed an issue on the key holder report when selecting key holders and printing multiple reports.

Version 8.19601.0.0

Fixed an issue acquiring a signatory acceptance form from a scanner.

Version 8.19401.0.0

Fixed an issue related to issuing a key bunch when there are restrictions between key cabinet and key holder category.

Version 8.19201.0.0

Improve system import to handle removed keys when they have previously been issued and returned.

Version 8.19103.0.0

Changed download updates, registration and associated calls to use TLS 1.2

Version 8.19102.0.0

Changed publishing protocol to use TLS 1.2

Version 8.19101.1.0

Improvements to the license service (Premium edition) to better tolerate network errors.

Keying matrix report can now show the key category.

Keying matrix report now has lines and keying indicators a little darker.

Small layout changes to accommodate language translations.

Version 8.18702.0.0

Product activation improvement on older Windows versions.

Updated system requirements, Windows 7 and 8 dropped, Windows 11 and 2022 added.

Version 8.18701.0.0

Improved handling when importing systems with poor key colour or lock information from locksmiths.

Key cabinet - key category is now displayed in the search.

Updated database engine (3.0.10).

Activation improvements to always use https.

Version 8.18502.0.0

Fixed some quirky behaviour when entering times (e.g. when issuing a key).

Fixed some menu graphics that were not displaying correctly.

Added the ability to find and remove unused pre-issue key emails.

Version 8.18501.0.0

Saving a job for sending to a locksmith could be saved with the wrong file extension. Fixed.

Keys report for the range "A selection of keys" now allows deleted and disabled keys to be selected. This makes it easier to print a concise report for recovering deleted or disabled keys from key holders.

Version 8.18305.0.0

Rolled the database back to version 3.0.8 as the 3.0.9 release introduced unacceptable poor performance.

Version 8.18304.0.0

Updated database engine (3.0.9).

Version 8.18303.0.0

Fixed incorrect message on one screen.

Fixed flashing button in the image editor.

Version 8.18302.1.0

Updated database engine (3.0.8).

Version 8.18301.0.0

Improvements to the wizard that moves keys into the key cabinet to handle broken keys.

Version 8.18201.1.0

On the "Select Key issue" window when searching for a key to issue, the system selection (All) has been added so that a key number may be searched for across all systems.

Added the capability to duplicate a key holder category.

Keys on issue export - added key bunch description as an additional column.

Keys on issue export - added options to choose how keys in a bunch are handled.

Added an export for key bunches on issue.

Version 8.17601.0.0

Improved downloading and installing updates from the publishing server.

Version 8.17501.0.0

Fixed a problem with the configuration of system-user security and key cabinet-user security when 2 key holders have the same name.

Version 8.17401.0.0

Fixes to doors report when using some selection options.

Fixes to keying matrix report when using some selection options.

Key holder category setup for overdue email - added merge field [Key_List2] which includes additional information.

Added two application parameters for controlling additional margins on reports for printing on letterhead paper.

Version 8.17201.0.0

Fixed an error when adding a key bunch when there are no key cabinets configured.

Version 8.17102.0.0

Fixed an error message that could occur when performing activation by telephone.

Version 8.17101.0.0

Key holders report - added selection option for "Key holders in a company".

Searching for keys - the category drop down list now shows categories only for the selected system.

Searching for doors - the area drop down list now shows areas only for the selected system.

Version 8.17003.0.0

Security restrictions were preventing some drop down lists of key categories and door areas showing - fixed.

Version 8.17002.0.0

Improvements to download program updates.

Version 8.17001.0.0

Initial release of ProMaster Key Manager 8.