



# User Manual

The screenshot shows the Key Organizer software interface. The window title is "Key Organizer - Key Management (C) 2003 - 2008 J. Rosenthal Software". The menu bar includes File, Edit, Handing over, View, Sort, Extra windows, Window, Language, Help, and Info. The main toolbar contains icons for Buildings, Doors, Cylinders, Keys, Cabinets, Employees, Handing over, and Deac. The left sidebar shows a "List of keys" with a search term "all master key systems". The selected key is "GK Warehouse Entry doors" under the "Warehouse" category. The main area displays key details: Key: GK Warehouse Entry doors, Key System: Warehouse, Type: SMK, Lock No.: [empty], Quantity: 9 Available of a total of 12 Pieces, Cabinet: Cabinet 1. Below this is a "Notes" field. At the bottom, there is a table of key holders:

Holder	Qty	ID	Issued on	Deadline	Notes
Stewart, Steve	1		25.10.2005		
Collins, Susan	1		25.10.2005		
Wright, Sandra	1		25.10.2005		

Buttons at the bottom include "Show person", "Return", "Lost", and "Found".

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# INSTALLATION AND SYSTEM REQUIREMENTS

## **System Requirements**

PC running Windows® 8, 7, Vista, XP or Windows Server (32 and 64 bit)

Optional: To view the instruction as PDF-file, you will need to have Adobe® Reader installed on your computer.

Optional: To print individually designed receipts (optionally with your company logo), you will need to have Microsoft® Word 2000 or later installed on your computer (e.g. in Office 2000 ... Office 2013).

## **Install KEY ORGANIZER**

1. Insert the installation CD-ROM into the CD/DVD drive of your computer or use the downloaded installation program.
2. The CD contains a file named "Setup.exe". Double-click this file.
3. Click "OK" to confirm the program installation.

Once the installation is complete, you will find shortcuts (symbols) for the KEY ORGANIZER on the desktop and in the program menu. Clicking these shortcuts will start the program.

If you plan to use the KEY ORGANIZER program in a network with more than one workstation, please also read the chapter "Network Use".

## **Software License**

Unless otherwise agreed with the developer/originator, you will need an individual license to use the KEY ORGANIZER program for each workstation. All intellectual property rights remain with Rosenthal Software Development, Jörg Rosenthal, Lippstadt, Germany.

To use the program, every user must agree to the program's license agreement.

# BASIC PROGRAM FUNCTIONS

Any data entry into the KEY ORGANIZER is based on the same principle:

You will find a command bar above the entry fields. Depending on the available actions, this bar contains different administrative functions (e.g. New, Edit, Save, Cancel, Delete, Issue, etc.)

**1** "New" will create a new data record and requires the entry of a new data set entry. "Edit" will set the selected entry to the editing mode that allows you to change existing data.

For easy identification of the editing mode, the entry fields of a data record that is in the editing mode are displayed in yellow.

You can save the edited data record or cancel the action without saving changes (also by pressing the ESC-key).

Caution: To avoid unintentional changes, a data record can only be changed if it is set to the editing mode with "New" or "Edit" and then saved / confirmed! For detailed information about filling in fields and the correct entry order please see the information pages dealing with the individual index cards.

"Delete" will remove the selected data record. Removed records will not be contained in lists any longer and cannot be used for new assignments and actions once they have been deleted. For some entries you will have to remove the link to other data records before you can delete the entry.

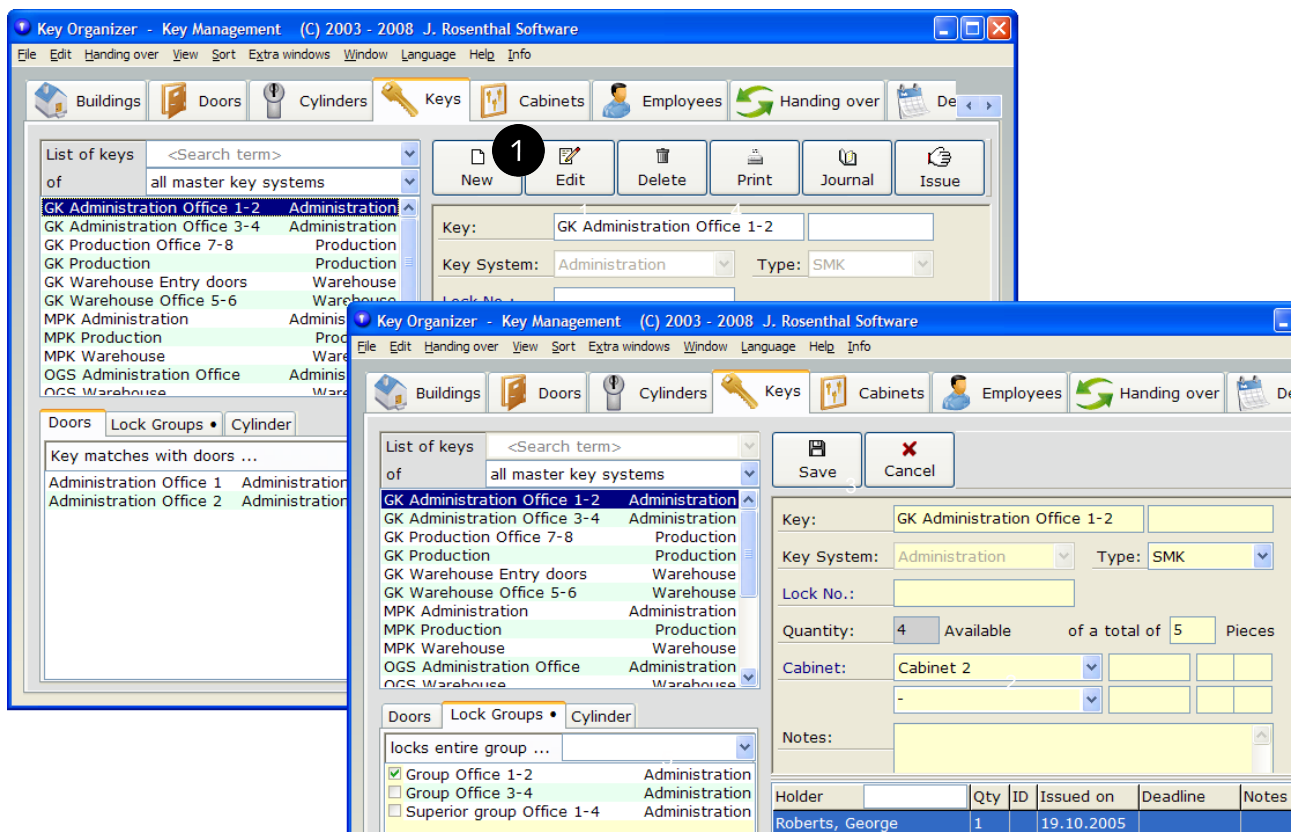
Marker (behind "Lock Groups"):  
A group that is locked with the entry (in this case a specific key) has been directly assigned to the entry. Depending on the index card, the marker can also be placed behind the tab "Doors", "Cylinders", "Lock Groups", "Sub Groups" or on the button "Ground Plan".

A marker always indicates that a link was set manually. You can display and edit these links using the functions "Change" and "Edit".

## Extended Search With CTRL+F

To open the extended search, select "Extended search" under "Edit" or press CTRL+F. "Extended search" will carry out a simultaneous full-text search of the following fields:

**EMPLOYEES Index Card:** Name, Notes, Department, Number | **BUILDINGS Index Card:** Name, Address, Notes | **DOORS Index Card:** Name, Cylinder Properties, Notes, Room, Floor | **KEYS Index Card:** Name, Key Type, Notes.



# DATA BACKUP

## Change Data Path

The folder containing the KEY ORGANIZER database with all your entries is called "Data" and is by default stored on your local hard disk in the directory C:\Program Files\KeyOrganizer\Data

If required, you can create another directory for the folder "Data", e.g. on a server, by selecting "Settings" under "Edit" in the program menu.

**CAUTION:** Changing the directory will not automatically copy existing data to the new directory. The folder "Data" must be manually moved to the new directory.

## Define Backup Frequency

To determine whether and when to perform backups of your data, select "Edit" under "Settings" in the program menu. Since the backup files are very small, we recommend to perform a backup "daily after use" and to untick the checkbox in front of the entry "Ask user before each backup".

Of course, it is up to you if you want to backup your data less frequently or not at all. But please keep in mind that you are responsible for the preservation of your data and that e.g. a hard disk defect might damage your data. For an optimum data protection, we recommend you to save your data externally (e.g. on CD-ROM) regularly in addition to the automatic program backup.

## Determine Backup Path

To determine the backup path, select "Directories" under "Edit" > "Settings" in the program menu. By clicking "Change" you can select a folder. The folder can also be stored on another computer as part of a network (e.g. a server). This additionally increases the data security.

## Restore Existing Data Backup

Only take the following steps if you want to replace (defect) data with backed-up data. Do not restore data if not necessary as this will completely replace existing data with older data. You will have to copy some data manually.

1. Close the KEY-ORGANIZER.
2. Use the Windows Explorer to open the data path where the program data is stored. The path can usually be found on your local hard drive in the folder C:\Program Files\KeyOrganizer\Data. The directory path can be found on the tab "Settings" under "Edit" in the program menu.
3. Move the file "Data.ada", which is contained in this directory, to a safe place and store it there. This file contains your latest database information.
4. Use the Windows Explorer to open the backup directory assigned to the KEY ORGANIZER under "Settings". There you will find two types of files: The first type starts with the word "data", the second type starts with the word "Log". The "Data"-files contain the database and their name also contains the creation date (in the format YYYY-MM-DD).
5. From this directory, take the latest "Data"-file and copy it to the program data directory (from which you have removed the file "Data.ada"). Rename the copied file as "Data.ada" (i.e. delete the date specification incl. blank).
6. In addition, copy all "Log"-files from your backup folder to the directory. It is not necessary to rename the "Log"-files.
7. When you relaunch the KEY-ORGANIZER, the program will be reset to the latest backup status.

# PRINTING OF RECEIPTS

Issuance and return receipts are a documentary proof of key transfers.

To edit the settings for the printing of receipts, select "Define texts for print-outs" under "Edit" in the program menu.

## Printing Of Receipts As RTF-Files

KEY ORGANIZER uses "Rich Text Files" (RTF) as standard templates for the printing of receipts. These templates can be found in the folder "Forms" in the program directory.

You can adapt these files to your requirements. The texts contain wild cards that will be replaced automatically with the relevant data when being printed.

RTF-files are slightly limited as regards their design flexibility and do not offer the possibility to use tables or images. If you have installed Microsoft Word on all of your KEY ORGANIZER workplaces, you can save the RTF-files as .DOC to use tables and images.

## Printing Of Receipts As Word-Documents

Alternatively to above-mentioned RTF-files, you can also use an individually created Word-document as print template for your receipts. This gives you the possibility to create your own receipts to the greatest possible extent, e.g. with your own texts and your company logo.

As a technical requirement, the word processor Microsoft® Word 2000 or later (e.g. Office 2000, Office XP, Office 2003 or 2007) must be installed on your PC.

You will have to enter wild cards into the Word-documents you wish to use as receipts. The KEY-ORGANIZER will automatically fill these wild cards with the relevant data. As template for the creation of your documents please use the RTF-files stored in the folder "Forms". These files are stored in the KEY-ORGANIZER program directory (by default on your hard disk in the folder C:\Program Files\KeyOrganizer).

You can rename your receipt templates and store them in a different folder. In this case, you have to specify the file names of your Word-documents in the KEY ORGANIZER program to divert the print-outs. To specify the file names, select "Define texts for print-outs" under "Edit" in the program menu. Select the Word-file you created for the required form type by clicking "Search". Closing the window will save your settings.

If the field "Print Preview" in the KEY ORGANIZER is activated, your documents will be displayed in the Microsoft® Word print preview. To print the documents, please also use the print function of Microsoft Word.

## Wild Cards In Templates

You can use the following wild cards in your RTF- or Word-documents. Most of the wild cards are already contained in the provided RTF-templates.

Caution: Please adhere strictly to the exact spelling - without umlauts and without blanks between word and hashes.

You do not have to use all wildcards, e.g. you can leave out enclosures or notes if you do not need them.

### #Key#

Name of the issued or returned key

### #System#

Key system the key belongs to

### #Notes1#

Display of the notes field from key master data. The multiline note field is displayed as one combined line

### #Notes2#

Note entered in the handing over form when the key was issued or returned

### #Date#

Date of issuance or return of the key

### #User#

Logged-in user who handed over the key

### #Person#

Key recipient (key holder)

### #PersonDept#

Field "Department" of key holder

### #PersonNumber#

Field "Number" of key holder

### #KeyCount#

Number of keys

### #KeyType#

Type of key

### #LockNumber#

Lock number of the key

### #Cabinet#

Key cabinet of the key

### #Hook#

Hook number in the key cabinet

### #Doors#

Multiline listing of doors that can be locked with the key

### #ActionVerb#

Type of transaction

### #SeqNumber#

Sequential number of receipts / documents

### #Subscriber#

Database client

### #Branch#

Branch number of client

# IMPORT AND EXPORT OF DATA, DATABASE CLEAN-UP, "SANDBOX" (PART 1)

To ease the transfer of already existing master data, the KEY ORGANIZER imports and exports data records as lists in the file formats .csv (Text), .xls (Excel) or .ods (OpenOffice).

This enables you to import and export e.g. data for the index cards "Persons/Employees", "Keys" and "Doors". Please also take notice of the corresponding information given in the help function of the program.

If you already use a key system management program, it will probably be possible to transfer your existing data to the KEY ORGANIZER using individual import filters. In most of the cases, it is also possible to import digital data of the manufacturer of your key system. If you wish to import this kind of data, please contact us by e-mail.

## Important Security Notes

Since it is impossible to undo an import, we recommend you to back up your database prior to an import. To back up your database, select "Perform Data Backup" under "File" in the program menu.

In addition, we strongly recommend you to make use of the "**Sandbox Mode**" (see next page). In the sandbox mode, you can check the result of an import **without any effects on your original data**.

## Import List

To import data, take the following steps:

1. Convert your existing data into a tabular format, e.g. with Excel. Arrange the columns exactly as shown in the KEY ORGANIZER import window.
2. Export the table you created as text or CSV-file. You can export these formats with a spreadsheet, e.g. Microsoft® Excel. Save the table as file type "CSV (Comma Separated Value) (\*.csv)" or "Text (Tab Separated Value) (\*.txt)".
3. In the KEY ORGANIZER, select "Import" under "File" and then choose the data type you wish to import, i.e. doors, keys or employees. Click the button "Open File" in the import window.

Check or uncheck the selection box to determine if the first row of your table contains titles. In the displayed table element you can then check if the columns of your table were assigned to the correct fields in the KEY ORGANIZER program.

4. If the table preview shows that the values were assigned correctly, click the button "Perform import" and your table data will be transferred to the master data.

**Important Note:** Prior to any import, we generally recommend to use the "**Sandbox Mode**" to check the import result (see next page). If the import does not produce the desired results, close the "Sandbox Mode" by pressing F10 or by logging out under "File" in the program menu. Try to import your data again with modified specifications in a new "Sandbox Session". Your original database will remain unchanged.

If the final import into your original database (i.e. *without* "Sandbox Mode") did not produce the desired results, please read the information on "Data Backup" to recover your data.

# IMPORT AND EXPORT OF DATA, DATABASE CLEAN-UP; "SANDBOX" (PART 2)

## Re-Import List / Update Data Records

You can re-import an updated list. To import an updated list, the first field of each line, i.e. the description, must be exactly the same as the name stored in the program. For this data record, all fields that were created beforehand will be overwritten.

Caution: All manual changes in the KEY ORGANIZER that have been done in the meantime will get lost at any rate!

## Import Lock Plan Model

With our standard import spreadsheet, you can collect data in Excel cells and import the data into the KEY-ORGANIZER. In many cases, this is much faster than gathering data manually, because the data records are automatically linked.

You can adapt this spreadsheet according to your requirements. Please download the file from [www.key-organizer.net](http://www.key-organizer.net) under "Download". The file contains a functional description and application information.

## Database Clean-UP

To clear-up your database after an unsuccessful import or in any other case, select "Special functions" under "Edit" > "Settings" in the program menu. There you will have the following options:

- Delete persons without keys
- Delete all persons
- Delete all keys
- Delete all doors
- change key system assignments
- assign specific keys of a key system to a key cabinet
- create cylinders from door data (if cylinder lengths and positions were defined in the index card "Doors").

## "Sandbox"

In the IT industry, the term "Sandbox" describes a simulated environment where actions can be taken without any effect.

The KEY ORGANIZER offers a "Sandbox" function, e.g. to check if the import of an Excel locking plan will be successful before importing the data to the original database. None of the changes done during a "Sandbox Session" will affect your original database.

To open the Sandbox function, select "Sandbox" under "File" in the program menu and confirm the action. The program will then change to the login section, where you can choose a copy of your original database named "Sandbox". Select this entry and log in anew. The "Sandbox" mode is marked with an easily identifiable red border.

You can now test any action, e.g. a data import.

To exit the "Sandbox" mode, select "File" > "Logout" in the program menu. You can then re-login to your unaltered original database.



# NETWORK USE

The KEY ORGANIZER is fully network-compatible, so that you can access a shared data stock from several workstations at the same time. For security reasons, a data record (e.g. a key data entry) can not be edited by more than one user at the same time.

Please note that the network use of the KEY-ORGANIZER program requires the purchase of additional licenses.

## Technical Requirements

To use the KEY ORGANIZER program in a network, you only need a shared directory on one of your computers that can be accessed by all PC-workstations that have the KEY ORGANIZER installed.

The shared directory is generally set up on a central server, but any "normal" PC with a correspondingly shared folder is absolutely sufficient. This network use has been successfully tested by us on a PC running Windows and also on a PC running Linux with the Samba-FileServer. The KEY ORGANIZER program itself, however, is a pure Windows application.

## Configuring For Network Use

By default, the KEY ORGANIZER setup installs a single workstation, i.e. the folder containing the data can usually be found on the hard disk in the program directory C:\Program Files\KeyOrganizer\Data\ This data path has to be modified for network use. Please take the following steps:

1. Close the KEY ORGANIZER.
2. Use the Windows Explorer to move the complete folder named "Data" to the server. The folder "Data" contains your latest database and can be found in your KEY ORGANIZER program directory.
3. After having moved the folder, check the authorization rights for the folder "Data". All Windows users who are supposed to use the KEY-ORGANIZER must have read AND write access to the "Data" folder, even if a user is not supposed to have an authorization to make changes in the KEY ORGANIZER (see Index Card USERS).

In the KEY ORGANIZER, the program users and the corresponding user rights are stored in a central database, so that you have to create a new user only once and centrally.

4. Launch the KEY ORGANIZER. On the settings-page ("Edit" > "Settings"), select the path to your server and to the folder "Data" as new data path.

5. The program will be closed automatically. Relaunch the program. From now on, the KEY-ORGANIZER will access your shared data stock via the network.

### CAUTION:

The program directory containing the .exe-file should remain on the local PC in any case and should be locally started from there! Therefore, the shortcuts on the desktop and in the start menu will remain valid and active. The use via a terminal server is an exception. Here, the program will only be installed once and centrally.

## Troubleshoot Potential Network Use Problems

In the case of error messages being displayed due to missing write access when using the KEY-ORGANIZER in a network (although write access to the folder was correctly set up), the reason might be that a client was unable to finish a save operation (e.g. due to a Windows system crash).

In this case, simply relaunch the KEY ORGANIZER of the respective client. This should solve the problem. If you do not know which is the correct client computer, you can check the file authorizations under Windows NT or Linux/Samba (using the Server Manager or SWAT) and read off the user of the file Data.wpf. This client then has to log on to its local KEY ORGANIZER again via the network (program restart while connected to the network).

# STEP-BY-STEP INSTRUCTION

## Correct data entry order

The KEY ORGANIZER gives you several possibilities to collect your data. This facilitates, for example, an easy on-the-fly entry of keys, doors and employees during each key issuance. This way, you can enter your data bit by bit.

For users with a larger amount of keys, we would, however, recommend the more clear-cut and more professional key management using lock groups and cylinders. In this case, specific master data should be created systematically to save time. We recommend to take the following steps.

The respective main aspects will be explained in the same order on the following pages.

## Notes On The Simplification of Data Collection

In addition to the manual data collection described below, you can also collect your data in Excel cells with our standard import table and import the list into the KEY-ORGANIZER. In many cases, this is much faster than gathering data manually, because the data records are automatically linked. However, this process is not available to every customer and usually also requires manual revision. Please simply download the table from [www.key-organizer.de](http://www.key-organizer.de) under "Download".

### 1 USERS Index Card > Page 11

- 1.1. Create users
- 1.2 Assign passwords
- 1.3 Determine authorizations

### 2 BUILDINGS Index Card > Page 12

- 2.2 Create buildings / parts of buildings

### 3 (KEY) CABINETS > Page 13

- Index card > Page 16
- 3.1 Create key cabinet
  - 3.2 Assign users with access authorization

### 4 DOORS Index Card > Page 14

- 4.1 Specify door description
- 4.2 Assign building

### 5 (LOCK) GROUPS Index Card > Page 16

- 5.1 Create groups
- 5.2 If you plan to work with nested groups: Create sub-groups first, then create main groups; then assign sub-groups to main groups

### 6 CYLINDERS Index Card > Page 17

- 6.1 Create cylinders
- 6.2 Assign cylinder to door / doors in which the cylinder is mounted
- 6.3 If the cylinder belongs to a key system and is part of a lock group, i.e. if the cylinder is locked not only with single keys but also with group keys: assign cylinder to a group

### 7 EMPLOYEES Index Card > Page 18

- 7.1 Create employees: Last name, First name
- 7.2 Enter additional fields according to template (see above)

### 8 KEYS Index Card > Page 19

- 8.1 Create keys
- 8.2 Select key system
- 8.3 Select key type  
(optional, but one single master key (SMK) MUST be defined as master passkey (MPK) and will then automatically lock all cylinders of the system)
- 8.4 Enter total number of keys
- 8.5 Select key cabinet
  
- 8.6.1 Single key: Assign cylinders
- 8.6.2 Sub-master key: Assign lock group
  
- 8.7 Save key
- 8.8 Combine keys in bunches or distribute to several cabinets
- 8.8 Issue key to employee

# USERS Index Card

Users are those persons authorized to use the program. The entire index card "Users" only requires the entry of one explicit name. The remaining fields are optional.

## Password

For security reasons, we recommend to protect the program with passwords.

Caution: A user, whose option "User + User Rights" is set to "Yes" is authorized to issue user passwords and can therefore grant him- / herself all rights. If you want to avoid this, set this option to "No" for the relevant user.

## Determine Authorizations

Specify the users' rights. You can determine authorizations for different key cabinets, e.g. a key cassette in the office and a key cabinet in the janitor's room.

## Journal

For security reasons, all changes are recorded in the user administration. This journal cannot be changed retrospectively. Open the journal by clicking the button top right or by opening the index card "Journal".

## Both User And Key Holder?

If a user is also a key holder, the user must be created twice in the program, i.e. as "Employee" and as "User".

Section	Field	Value
Change master data	Persons	Yes
	Keys	for all key cabinets
	Doors	Yes
	Buildings / Master key systems	Yes
	Users + User rights	Yes
Handing over	Issue key	for all key cabinets
	Return key	for all key cabinets
	Lost / Found	for all key cabinets
	Defect / Subseq. deliveries	for all key cabinets
Other	Change settings	Yes
	Configure printouts	Yes
	Print/export lists	Yes

# BUILDINGS Index Card

On the index card BUILDINGS, you can create all buildings or parts of buildings.

## **Name & Name Affix**

Two fields are provided to enter a "Name": In the first and longer field, please enter only one short name (that will only be used once). In the second field, you can optionally enter e.g. an object number or the key system that is used. This description will be displayed in square brackets behind the name in the list view (e.g. [BKS]).

## **Assign Key System**

If you govern key systems with the KEY-ORGANIZER, you can assign a key system to a (part of a) building here. "-" means that no system has been assigned. The selection "own key system" is of no relevance to the latest program versions. It is only still included for compatibility reasons and should not be used when creating new (parts of) buildings. Therefore, please select "-" for "no key system assigned" or select and specify the correct key system here.

Caution: You can only assign one key system to one entry in the category "Buildings / Parts of Buildings". If more than one key system is installed in one building, please enter the building data as parts of buildings, e.g. "Storeroom 1st Floor" and "Storeroom 2nd Floor" or similar.

## **List of Doors**

This window displays the doors assigned to a building. Please assign doors to buildings later on the index card DOORS. Double-clicking one of these doors will directly open the entry for this door on the index card DOORS

# CABINETS Index Card

The KEY ORGANIZER gives you the possibility to create different key cabinets and assign corresponding rights to the program users. For example, a member of the administration department can be granted authorization to govern the keys contained in the cabinet "Till" while not being authorized to govern the keys in the cabinet "Janitor's Room".

## Cabinet Name

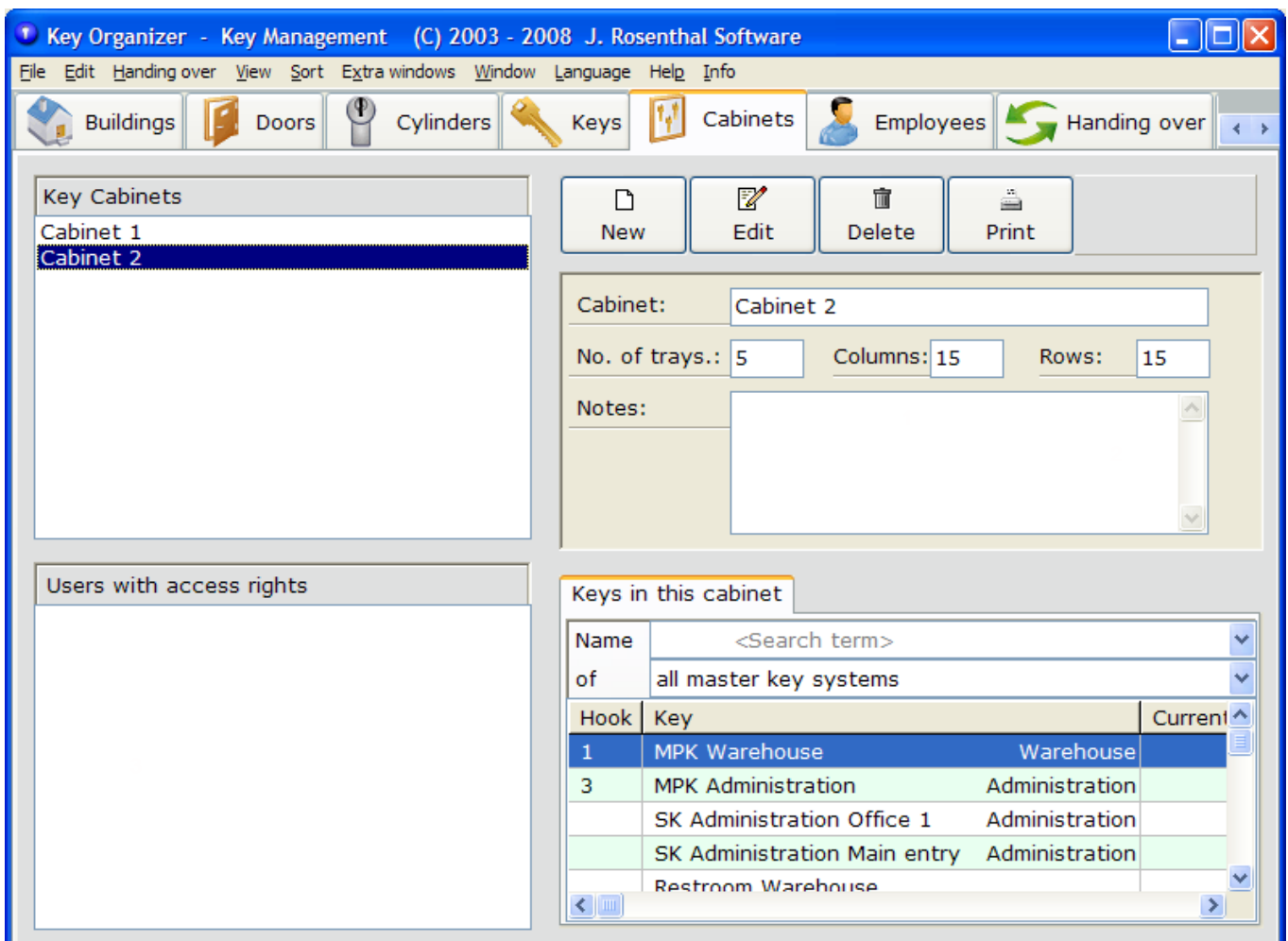
A name may not be assigned more than once.

## Number of Trays, Columns, Rows

The program does not (yet) evaluate this data. This information is reserved for a graphical display in future versions.

## Specify Users with Access Authorization

You need to be authorized to execute this command (see index card "Users").



# DOORS Index Card (Part 1)

On this index card, you can create doors and assign buildings, key systems and cylinders to these doors.

## Specify Door Name

A name may not be assigned more than once per building.

## Assign building

Here you can determine which building or part of building the door belongs to. Building data is entered on the index card "Buildings".

## Select the Cylinder's Key System

If you wish to work with cylinders, select the cylinder's key system here. The selection "of building" is of no relevance to the latest program versions. It is only still included for compatibility reasons. Here, please select either "-" for "no key system assigned" or select and specify a key system.

## Select Cylinders

If you have defined cylinders or if you wish to work with specific cylinders, you can select the cylinder corresponding to the door here. This approach has the advantage that you do not have to specify once more for each key separately that it (un)locks the corresponding door on the index card "Keys".

## (Un)Locking Keys and Persons

Highlighting a door will display a list of results at the bottom. The list shows which keys (un)lock the door and which employees have such a key. Double-clicking will directly open the relevant key entry on the index card "Keys".

## Door Search According To Key Systems

From this list, select for which key system the doors shall be displayed. If you enter a text into this field, the complete door database will be searched for entries containing the text entered as a part of their name.

## Door Search According to Buildings

From the list, select for which building or for which part of a building the door shall be displayed.

## Floor and Room

When entering a floor, please make sure to always use exactly the same spelling to guarantee that the field can be correctly evaluated.

For example, always enter "Floor 1" and not once "Floor 1" and then "Floor-1".

## Import Doors

You can let the KEY-ORGANIZER automatically take over your existing data by selecting "Import" under "File" in the program menu.

>> Continue reading on the next page

List of doors	<Search term>	<input type="button" value="New"/> <input type="button" value="Edit"/> <input type="button" value="Delete"/> <input type="button" value="Print"/>	
in	All buildings	Door:	Administration Office 1
Administration Main entrance	Administration Building	Building:	Administration Building
Administration Office 1	Administration Building	Floor:	1st <input type="button" value="Floor Plan"/> Pos.: <input type="text"/>
Administration Office 2	Administration Building	Room no.:	<input type="text"/> Room: Office 1
Administration Office 3	Administration Building	Notes:	<input type="text"/>
Administration Office 4	Administration Building	Key System:	Administration Cyl Pos.: 010
Administration Plant room	Administration Building	Cylinder:	C_Administration Office 1
Administration Restroom	Administration Building	Lock No.:	<input type="text"/> Length: 35/35
Administration Server room	Administration Building		
Production I	Production Hall		
Production II	Production Hall		
Production Office 7	Production Hall		
Production Office 8	Production Hall		
Production Restroom	Production Hall		
Warehouse Main entrance	Warehouse		
Warehouse Office 5	Warehouse		
Warehouse Office 6	Warehouse		
Warehouse Restroom	Warehouse		
Warehouse Side entrance	Warehouse		
Matching keys		Inventory	Persons with access authorisation
GK Administration Office 1-2		Administration	4 / 5 Roberts, George
MPK Administration		Administration	7 / 10 Henderson, Timothy; Adams, Barbara

# DOORS Index Card (Part 2)

## Store Ground Plan

On the index card "Doors", the KEY ORGANIZER supports the use of images as ground plans. You have the possibility to store an image for each floor of a building or for each part of a building.

The black marker indicates that a ground plan is stored. If there is no marker, no ground plan is linked to the data.

## Supported image formats

If you use Windows XP or Vista, you can use ground plan images in the common file formats JPG, GIF, PNG, BMP and TIF. If you use an older Windows version, you can only use BMP or some JPG file types. If your ground plans are only available in other file formats, you will have to export your images from your program and convert them into a supported format. The program does currently not support links to other file types as e.g. AutoCAD drawings.

The selected file will be automatically copied to the KEY ORGANIZER's data directory. This means that you may rename, move or delete your selected original file later without any effects on the display in the KEY-ORGANIZER.

## How to embed the correct size

The Key Organizer will take over the JPG image file at a ratio of 1:1 and will not change its size (width and height in pixels). Therefore, please select the size of your images in advance and set them to the scale they shall be displayed later on the screen when displayed at 100%.

Current monitors support a resolution of 1024x768 pixels or more.

## Embed an image file

To embed a ground plan, select a door in the KEY ORGANIZER for which a building or a part of a building has been selected and for which the field "Floor" has been filled in correctly.

Clicking the button "Ground Plan" will then display the information on the left side of the screen that no ground plan has yet been stored. Under this information, the button "File" offers the option to "Add ground plan" when being clicked. Then you can select an image file from your hard disk. This image file will then be assigned to the building's floor.

## For which doors will the ground plan be displayed?

An assigned ground plan will be displayed for EVERY door that is on the same floor of the same building or part of a building. This means that the text entered in the field "Floor" must be identical for all doors drawn in on one ground plan.

As soon as one door is assigned to the same building / part of a building and floor, the ground plan will be displayed for this door. This means that you only have to assign the ground plan once.

# LOCK GROUPS Index Card

If required, you can create and govern your lock groups on this index card.

This time-saving feature is particularly recommendable if you want to display your locking plan in the KEY ORGANIZER or if you wish to professionally manage a large number of keys and cylinders. For example, the index card offers the possibility to assign a key to a lock group without having to separately assign cylinders or doors that are (un)locked by this key.

However, if you wish to work with lock groups, the manufacturer of your key system should have provided you with relevant data (locking plan or importable data). The benefit of a subsequent search for complex lock group data does in many cases not justify the effort.

## **Names of Groups**

A name may not be assigned more than once per key system.

## **Assign Key System**

One lock group can only refer to one key system, since sub-master keys always belong to one individual key system.

## **Assign Keys**

Specify which keys belong to this group, i.e. which keys (un)lock the cylinders assigned to this group.

## **Assign Cylinders**

Here, please assign the corresponding cylinders to the lock group. The marker on the tab indicates that entries are stored. You can also assign the relevant cylinders to a group by using the index card "Cylinders".

## **Assign Sub-Groups**

Here you can assign already created lock groups as "sub-group". A sub-group may again contain its own sub-groups and so on. As soon as you have assigned a cylinder to a group, a key that (un)locks this cylinder can also (un)lock all sub-groups. This means that you can define a large number of interdependent lockings in only one work step. A missing marker on the tab indicates that no sub-groups were assigned here.

## **Multiple Assignment / Confusion**

Particularly when no clear data is available, a program user might tend to create a multiple assignment of keys, groups, cylinders, etc. via different index cards.

The KEY-ORGANIZER will treat these multiple assignments without error messages and exactly as you entered them. This means that you can work on a completely independent basis and that you can hardly go wrong with this. All links are "additive", which means that the locking possibilities add up.

Redundant multiple assignments can, however, lead to a lack of clarity and considerable additional acquisition effort. The best way to avoid this will be an elaborate and consistent data recording strategy.



# LOCK CYLINDERS Index Card

On this index card, you can govern your doors' lock cylinders. The creation of cylinders is particularly recommendable if you want the KEY ORGANIZER to professionally display a key system and a locking plan. Here, assign to your cylinders specific doors in which they are installed. You can additionally assign every cylinder to one or more lock group.

## **Name & Additional Name**

Enter a lock name. A name may not be assigned more than once per key system. The entry of an additional name is optional.

## **Key System**

Select the key system the lock cylinder belongs to. Prior to this, you can specify the key systems with the menu: Edit > Key Systems.

## **Position**

This entry typically refers to the sorting order in the locking plan. Fill in this field if you have corresponding data in hand and if these are of importance to you.

## **Type, Coloring, Locking, Form**

These fields are only supposed to be a memory aid for you and will not be automatically evaluated by the program. The field "Type" refers to single lockings ("E"), additional lockings ("I" / "M") and central lockings ("Z") and is in particular filled with corresponding data when importing KWD-data, provided that the KEY-ORGANIZER supports the relevant KWD-format.

## **Doors**

Specify in which doors this cylinder has been installed. If you have not yet entered any doors, you will have to specify doors first by using the index card "Doors". The marker on the tab indicates that a door has been assigned manually. If there is no black marker, the KEY ORGANIZER will automatically create the entries from existing links.

## **Lock Groups**

Here you can determine which lock groups this cylinder belongs to if you want to work with lock groups. If you have not yet entered any lock groups, you will have to specify corresponding groups first by using the index card "Groups".

## **Disposition**

Here you find discarded cylinders. You can discard cylinders by clicking the 1st data field under "Disposition" using the right mouse button and making your entries.

## **Quantity ... available**

Enter the number of cylinders manually. The program will automatically calculate the number of available cylinders from the total quantity less the installed cylinders less the defect or discarded cylinders.

# EMPLOYEES Index Card

Govern "Employees", "Tenants", "Holders", "Customers" or "Persons" here. By selecting "Settings" under "Edit" in the program menu, you can determine which term to be used by the KEY ORGANIZER.

## Extended Search With CTRL-F

The "Extended Search" under "Edit" will search the following fields of the EMPLOYEES index card: Name, Notes, Department, Number. At the same time, this command will search the index card BUILDINGS (Name, Address, Notes), the index card DOORS (Name, Cylinder Properties, Notes, Room, Floor) and the index card KEYS (Name, Key Type, Notes).

## Name

A name may not be assigned more than once. Because of the alphabetical order, we recommend the entry variant "Last name, First name".

## Department

The term entered will automatically be taken over to the selection list (3), so that you can execute a quick search according to departments. You can change the lettering of this field in "Identifier" or "Customer no." in the "Department" settings (program menu at the head of the screen).

## Search Specification / Search Entry Field

From this list, select for which department the employees shall be displayed.

If you enter a text into this field, all entries from the list of employees (5) that contain the text you entered as part of their name will be displayed cross-departmentally.

## Search In Buildings

From this list, select for which building the employees shall be displayed (if assigned).

## Key Result List

The highlighted employee has the following key(s). Caution: You can only issue a key by creating this key first on the index card "Keys" and then passing it on to an employee.

## Access Result List

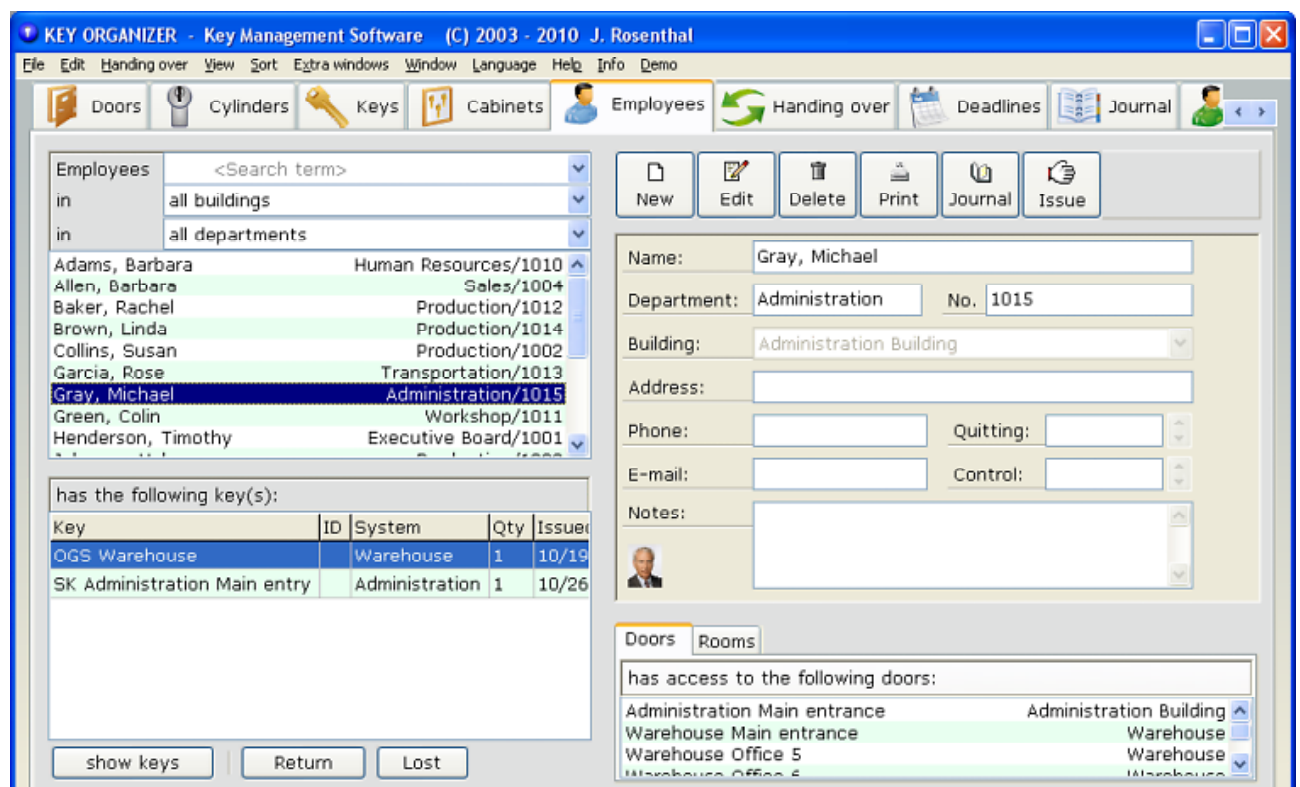
With the key displayed on the left, the employee can (un)lock the following doors. The tab "Rooms" displays a summary of the room names belonging to the doors that can be (un)locked (please make the corresponding entries on the index card "Doors").

## Journal

Click this button to open the index card "Journal" and to display all undeletably recorded transactions for a specific employee (e.g. create user, key issuance and return, etc.).

## Insert Pictures Of Employees

Here you can store pictures of employees. Clicking them will enlarge the pictures. The maximum final size of the pictures is 229 x 285 pixels. If your pictures are larger, the KEY-ORGANIZER will automatically downsize them. Since all pictures will be copied to the program database, your original files will not be required any more afterwards (however, we recommend you to backup your image files anyway). Click the small symbol using your right mouse button to change and insert a picture.



# KEYS Index Card (Part 1)

This index card is one of the KEY ORGANIZER's essential and central points. If you want to link keys to specific doors, cylinders, buildings or lock groups or if you want to issue these keys, it is necessary to record their master data beforehand. Please also note the processing sequence as described on the page "Step-By-Step Instruction".

## Key description

Use the first field to enter a key name. In case of need, the second field can for example be used for another distinguishing feature. The second field's content will be displayed in square brackets in the list view. The key name, which is a combination of both fields, may only be used once per key system.

## Assign key system

Here you can assign a key to a key system. "-" means that no system has been assigned (e.g. for a car key).

## Key type

This entry is optional and will not be evaluated. Only a passkey which (un)locks all cylinders of a key system MUST be defined as "GGMK".

You can make the following assignments:

- CK Change Key / individual key
- SMK Sub-Master Key
- MK Master Key
- GMK Grand Master Key
- GGMK Great Grand Master Key
- EK Emergency Key
- "I" and "M" (additional locking)

## Quantity

When creating a key entry, enter the total amount of all of a key's copies, i.e. the total number of all available and issued original keys and duplicates. This figure will later change automatically when you re-order keys. It is also possible to change the number of keys at a later date. This will then be recorded in the journal. If you click the command "Inventory" using the right mouse button in the field "available" on the left, you can also change this field.

## Assign Lock Group

If you work with lock groups (see index card "Groups"), this is where you can define the lockings very easily without having to separately assign a cylinder or a door to the key. When a lock group has been assigned, the key automatically (un)locks the cylinders contained in this group and the doors where these cylinders are installed as well as the related sub-groups.

## Assign Cylinders

This is where you can assign those cylinders to a key that are (un)locked by it. When creating a sub-master key and working with lock groups, you should not assign the key directly and manually, but assign the sub-master key to a lock group (see 5).

## Assign Doors

This is where you can assign a specific door to a key that is (un)locked by it. Use this function only when you NEITHER work with cylinders NOR with lock groups, because otherwise this would imply an additional acquisition effort. When you assign a key directly and manually, a marker will be displayed on this tab indicating the direct assignment.

*Note: Overlapping lock groups, cylinders and doors can be assigned to a key without any difficulties or malfunction; all locking options will be added up. This, however, involves the risk that you lose track of the lockings and might not be able to reconstruct the creation context and relations of a locking. Therefore, we recommend a systematic and well-structured approach!*

>> Continue reading on the next page

The screenshot shows the KEY ORGANIZER software interface. The title bar reads "KEY ORGANIZER - Key Management Software (C) 2003 - 2010 J. Rosenthal". The menu bar includes File, Edit, Handling over, View, Sort, Extra windows, Window, Language, Help, Info, and Demo. The main toolbar contains icons for Buildings, Doors, Cylinders, Keys, Cabinets, Employees, Handling over, and Deadlines. Below the toolbar, there are buttons for New, Edit, Delete, Print, Journal, and Issue. The central area is divided into a list of keys on the left and a form for editing a key on the right. The list of keys includes entries like "GK Administration Office 1-2 Administration", "GK Warehouse Entry doors Warehouse", and "MPK Administration Administration". The form on the right shows fields for Key (GK Warehouse Entry doors), Key System (Warehouse), Lock No., Type (SMK), Quantity (9 available of a total of 12 pieces), Cabinet (Cabinet 1), and Notes. At the bottom, there is a table with columns for Holder, Qty, ID, Issued on, Expiry, and Notes, containing entries for Stewart, Steve, Collins, Susan, and Wright.

Holder	Qty	ID	Issued on	Expiry	Notes
Stewart, Steve (Product	1		10/25/2005		
Collins, Susan (Product	1		10/25/2005		
Wright, Sandra (Product	1		10/25/2005		

## KEYS Index Card (Part 2)

Here you will find further information about the functions provided by this index card. Please also read the preceding page.

### **Issuance Lists**

Double-click an entry to change to this entry on the corresponding index card.

### **Search Function**

Entering a term will initiate a search of the key list for the character string you entered. Entries matching your search term will be displayed or hidden during the search process. Your search term can be found at any point in the list.

The program also offers automatically created search criteria, e.g. for key systems that have been created. You can select one of these search criteria in the pull-down list.

### **Issuance, Return, Loss**

Click these buttons to change directly to the index card "Handing Over".

### **Important Notes on Program Modifications**

1. Since mid-2007, the list of key holders also contains a list of defect keys.
2. To guarantee an auditing acceptability, the total number of keys will not be reduced if there are defect copies.

# Use Bunches of Keys

From Version 11/2006, the KEY ORGANIZER program supports the administration of bunches of keys. A bunch is based on the connection of single keys, i.e. the keys of one bunch must be individually created beforehand. The program will treat the bunches as individual keys.

## 1. Create Bunch Of Keys

Select the index card "Keys" to create a new bunch of keys. On the index card, do NOT select the button "NEW", because this will create only individual keys. Instead, select "New bunch of keys" under "Edit" in the program menu. In the input mask, enter the name of the bunch of keys. The name should start with "bunch" to provide an easy identification and differentiation from individual keys at first glance.

In the KEY-ORGANIZER, one bunch cannot occur more than once (therefore, the entry of a quantity is deactivated here), i.e. if required, several identical bunches will have to be created individually.

Different from individual keys, it is not possible to create direct links between bunches and doors, lock cylinders or lock groups. Instead of these direct links, the bunch's locking options automatically result from the lockings of the contained single keys.

Since creating a new bunch will not define the bunch's single keys, save the newly created bunch data record after having entered a name.

## 2. Add Key To A Bunch Of Keys

Keys are added to a bunch with the issue / return mechanism similar to the mechanism used for the transfer of keys to persons.

Select the key you want to add to a bunch. Press [Ctrl]+[m] to add the key to the marked list. Repeat this action to add more keys to the marked list if you want to attach more keys to the bunch.

When the marked list contains all keys you want to add, select the bunch to which you want to add the keys. In the marked list, highlight all keys and click the button "Issue". You will then be asked if you want to issue the keys to a person or to the selected bunch. Confirm this message by clicking the button "Bunch".

The program will now open the index card "Handing Over". On this index card, you will have to confirm the transfer one more time. This transaction does not contain the option to print a receipt. Delete the keys from the marked list to complete the transaction.

## 3. Take Key From A Bunch Of Keys

To take one individual key from a bunch at a later date, select the respective key in the list of keys and search for the bunch of keys in its list of holders. Click "Return".

## 4. Issue Bunches Of Keys To Persons

Bunches of keys are issued and returned to key holders exactly in the same manner as single keys are issued and returned.

To issue a bunch, first select a person, then select an available bunch of keys. Click "Issue".

To return a key, select the bunch of keys, then select its holder and click "Return".

# HANDING OVER Index Card

This card contains the functions "Issue and Return", "Lost and Found" and "Defect and Repeat Order". This index card is normally opened from another index card, e.g. from the index card "Keys". Then the last activated key is already selected.

## **Help Texts**

When working with the KEY ORGANIZER, please take note of the individual detailed help texts for your program version. These texts will offer you any required additional information on the individual program functions and transactions.

## **Specify Quantity**

Enter how many copies of a key you e.g. want to issue or take back.

## **Old Stock and New Stock**

The program calculates these figures automatically. To guarantee an auditing acceptability, these figures cannot be altered.

## **Printing of Receipts**

To create your own texts, select "Define texts for print-outs" under "Edit" in the program menu at the head of the screen.

## **Specify Return Deadline and Notes**

Values entered here can be changed by selecting the respective employee (list down right) for the relevant key.

Right-click the entry to select the command "Edit deadline + notes" and / or "Edit details".

## **Multiple Issuance of Several Keys to One Person**

Open the index card "Keys" and select "Bookmarked Data Records" in the program menu at the head of the screen. This will open a separate window. On the index card, select the key you want to issue to a person and add it to the selection window "Bookmarked Data Records" by clicking the button "Add" or pressing the keys CTRL-M. To issue more keys to the same person, repeat this action.

In the selection window "Bookmarked Data Records", select the keys you want to issue and click the button "Issue" to confirm. All keys will be issued simultaneously and will be listed on the issue receipt.

# DEADLINES Index Card

This index card will help you to keep an overview of when which user must return which key(s).

## **Deadlines Result List**

If the return of a key or more keys is due, this list will be displayed every time the program is launched.

## **Show Missed Return Deadlines**

Select:

"to this day"

"for the next 7 days"

"for the next 30 days"

and confirm your selection by clicking "Find".

## **Switch to Key / Switch to Holder**

Change directly to a key or a user from an entry, e.g. to return the key.

## **Edit Deadline**

To change a deadline you determined when a key was issued, select the respective employee (list down right) for the relevant key on the index card "Keys". Right-click the entry to select the command "Edit deadline + notes".

# JOURNAL Index Card

The KEY ORGANIZER's journal function is intended to be used for the monitoring of the program operation and for revisions. Therefore, journal entries cannot be deleted or changed in retrospect.

The easiest way to open journal entries is to select a data record on the index card "Employees", "Users" or "Keys" and to click the button "Journal" top right.

## **Search Field**

To search the list, either select an entry in the list or enter a sequence of letters. To display all entries, leave the field blank and click "Search".

## **Use the "Time Travel Function" To See Data Of An Earlier Point In Time**

In addition to journalizing important transactions (e.g. issuance or return of a key, changes in quantities, etc.) it may be necessary to display the state of the entire key management as it was at a specific point in time in the past.

However, doing such an analysis with a journal list is not very practical. For this reason, a new function was added to the KEY ORGANIZER in March 2007. Now it is possible to display the state of the entire key management system as it was at a specific point in time in the past - including all existing links, keys, employees etc. of the desired date.

When using the "Time Travel Function", you can use the KEY ORGANIZER as normal without changing your original database.

## **Using the "Time Travel Function"**

In the journal, select an entry, e.g. a key issuance or return, and click the button "Time Travel" at the bottom of the screen.

This will open a new KEY ORGANIZER window highlighted with a yellow-orange frame. This window displays the state of the database as it was at the point in time of the selected journal entry.

Unfortunately, it is not possible to go back to a date earlier than March 2007, since the "Time Travel Function" requires an internal storage of additional points in time, which could only be created for the first time together with the existence of this function.