InstaKey Security Systems

Key Audit Tutorial
Release 4.0.3 – 9/26/2019

Making KeyControl® simple.

1. Login is the same as SecurityRecords credentials.

SR Key Audit

Username	BetaTestUser
Protected ID	••••••••
Password	••••••••••

Login

Forgot: Username / ProtectedID / Password

G Sign in

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2. Summary page allows users to pick from Existing Audits, or to create a "New Audit"

New Audit ←

Existing Audits (0)

Audit Name	Customer	Open Runs	Start Date	Frequency	Last Run	Next Run	Sharing	Created By	Create Date
No records to display.									

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3. To start a new audit, input a name for the audit. If the user has access to more than one customer, select the name of the customer you are auditing.

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Security Systems

4. Choose either "Private" (for audits only you can see) or "Public" (for audits that will be shared). Select "Create".

SR Key Audit
Test User   **Logout**

New Audit

Master Key Weekly Audit

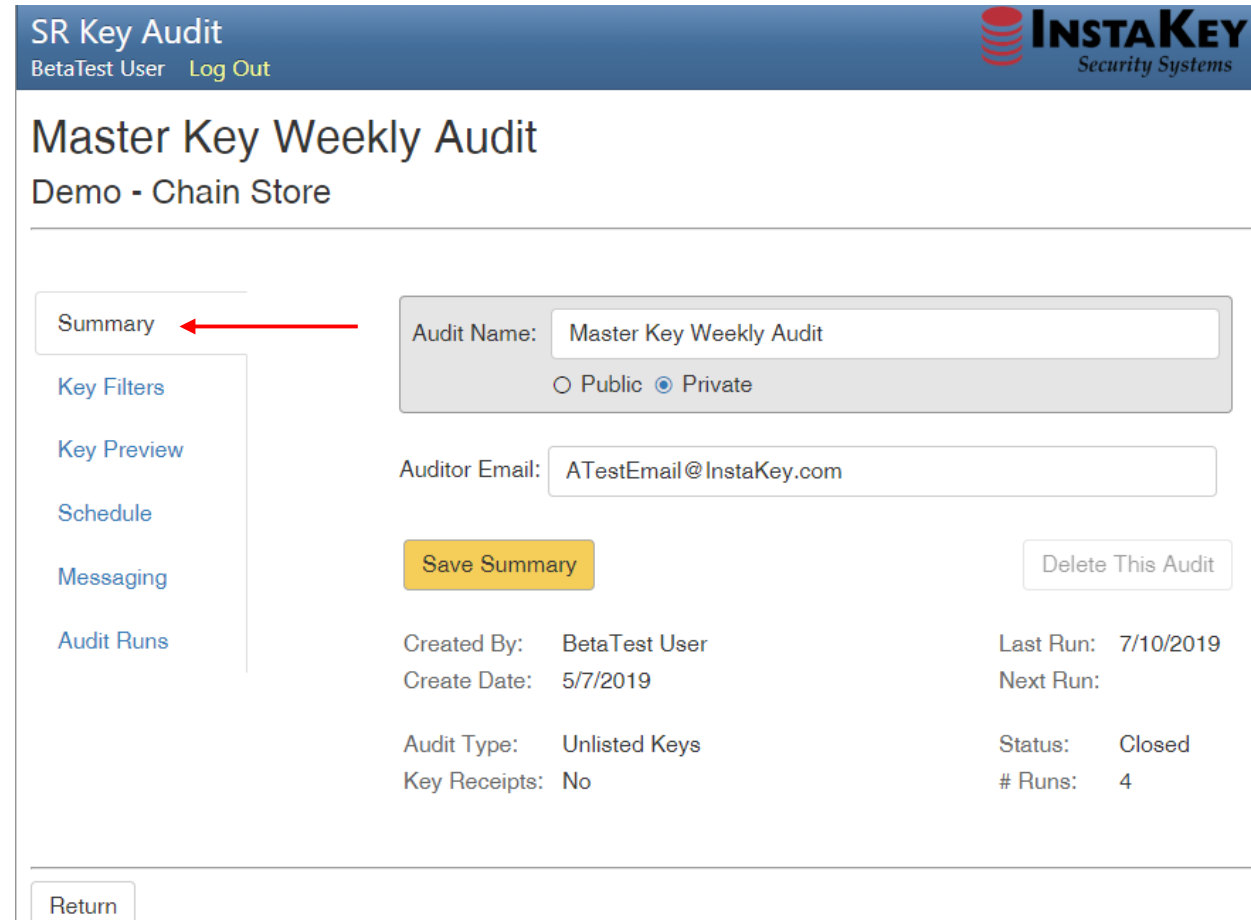Demo - Chain Store ▼

⦿ Private ○ Public   **Create**   Cancel   ←

Existing Audits (0)

Audit Name	Customer	Open Runs	Start Date	Frequency	Last Run	Next Run	Sharing	Created By	Create Date
No records to display.									

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5. Go down the tabs from "Summary" through "Messaging" to customize your audit.
Utilize the Auditor Email field to change ownership of the audit as needed.
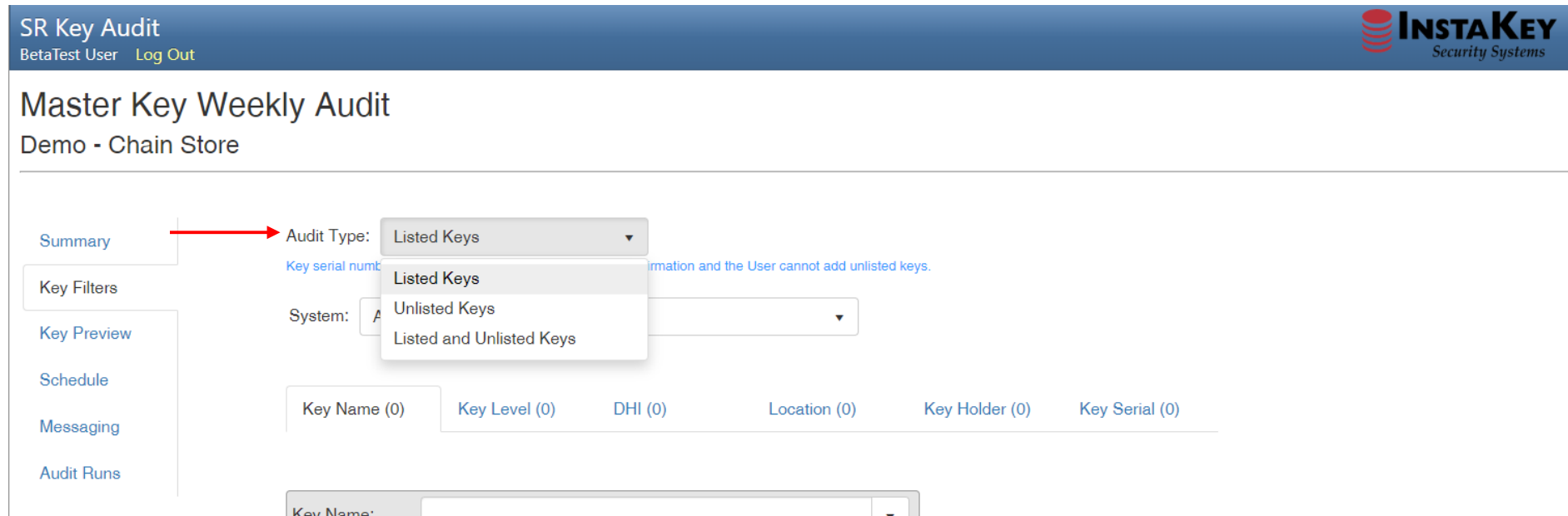
6. Audit Type determines *how* the keys on audit are requested:

- Listed - Key serial numbers are provided in the audit request for confirmation and the User cannot add unlisted keys.
- Unlisted - No serial numbers are provided to the key holder, instead key holders are sent a request to provide the key serial number(s) they have in their possession. *May only be used with Key Holder filter option.*
- Listed & Unlisted - Key Serial numbers are provided in the audit request for confirmation, but the key holder can provide serial numbers for additional keys.

7. Filters allow a variety of ways to narrow the keys being audited. The "Key Name" field can be defined by selecting the "Key Definition" option under the "Keys" tab in Security Records.

SR Key Audit
Test User   Logout

Master Key Weekly Audit
Demo - Chain Store

Summary	Key Name (0)	Key Level (0)	DHI (0)	Location (0)	Key Holder (0)	Key Serial (0)

Key Filters

Key Preview

Schedule

Messaging

Audit Runs

Key Name: [▼]

Associate Only
Cash Drop Box Only
Cash Office Only
Cashier Only
Compactor Only

Selected:
0

Clear

▼ Items 1-19 out of 19

Save Key Filters

☐ **Exclude recently updated keys**

Skip keys updated within

[▼] [▼]

of Audit Run

Return

8. "Key Level" filtering is based upon the type of key it is.

9. "DHI" filtering is based upon the specific keyset but does not filter locations.
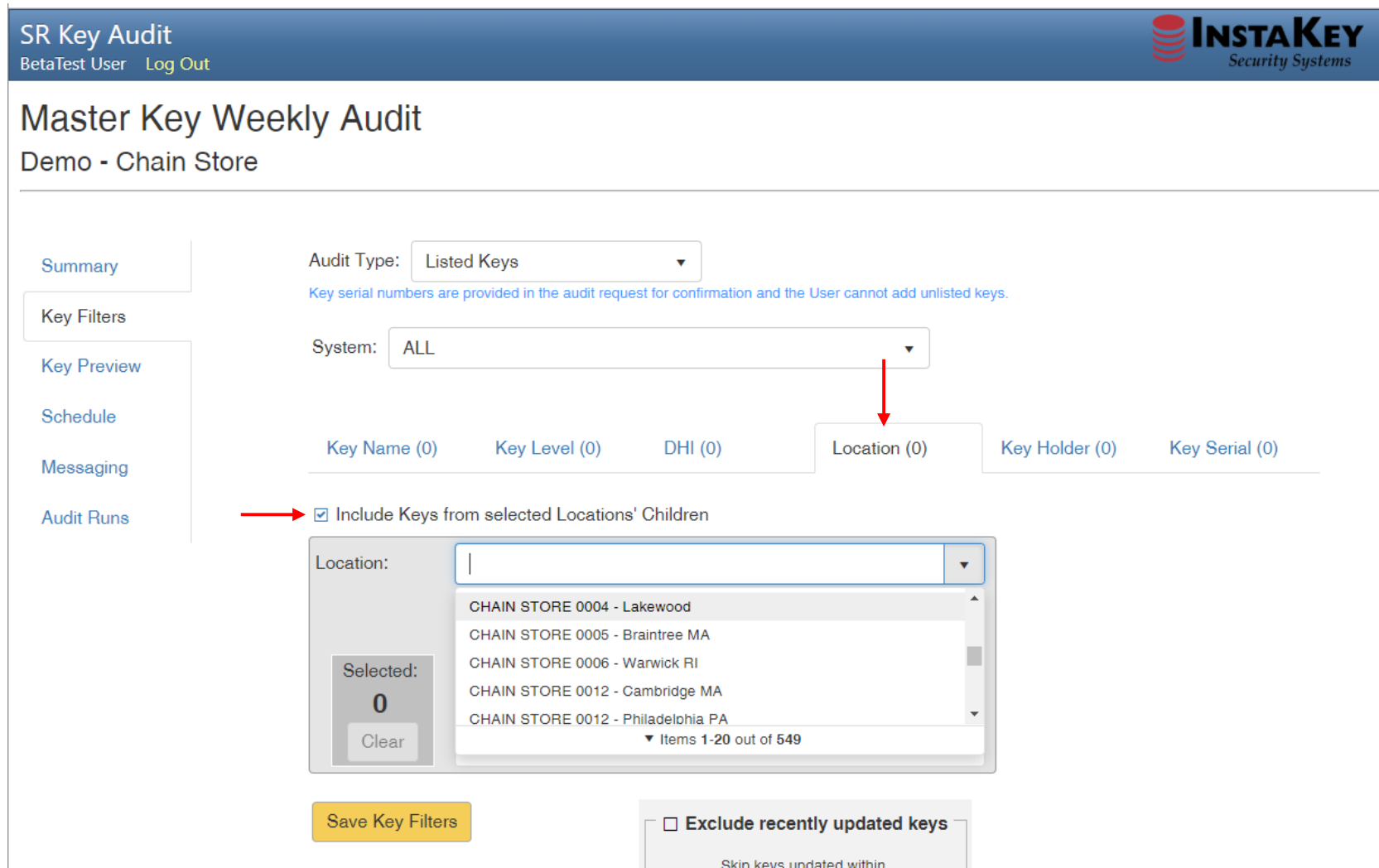
10. Filtering by "Location" is a great way to survey entire groups of keys based on the location(s) selected. Select "Include Keys from selected Locations' Children" to quickly select groups by parent.
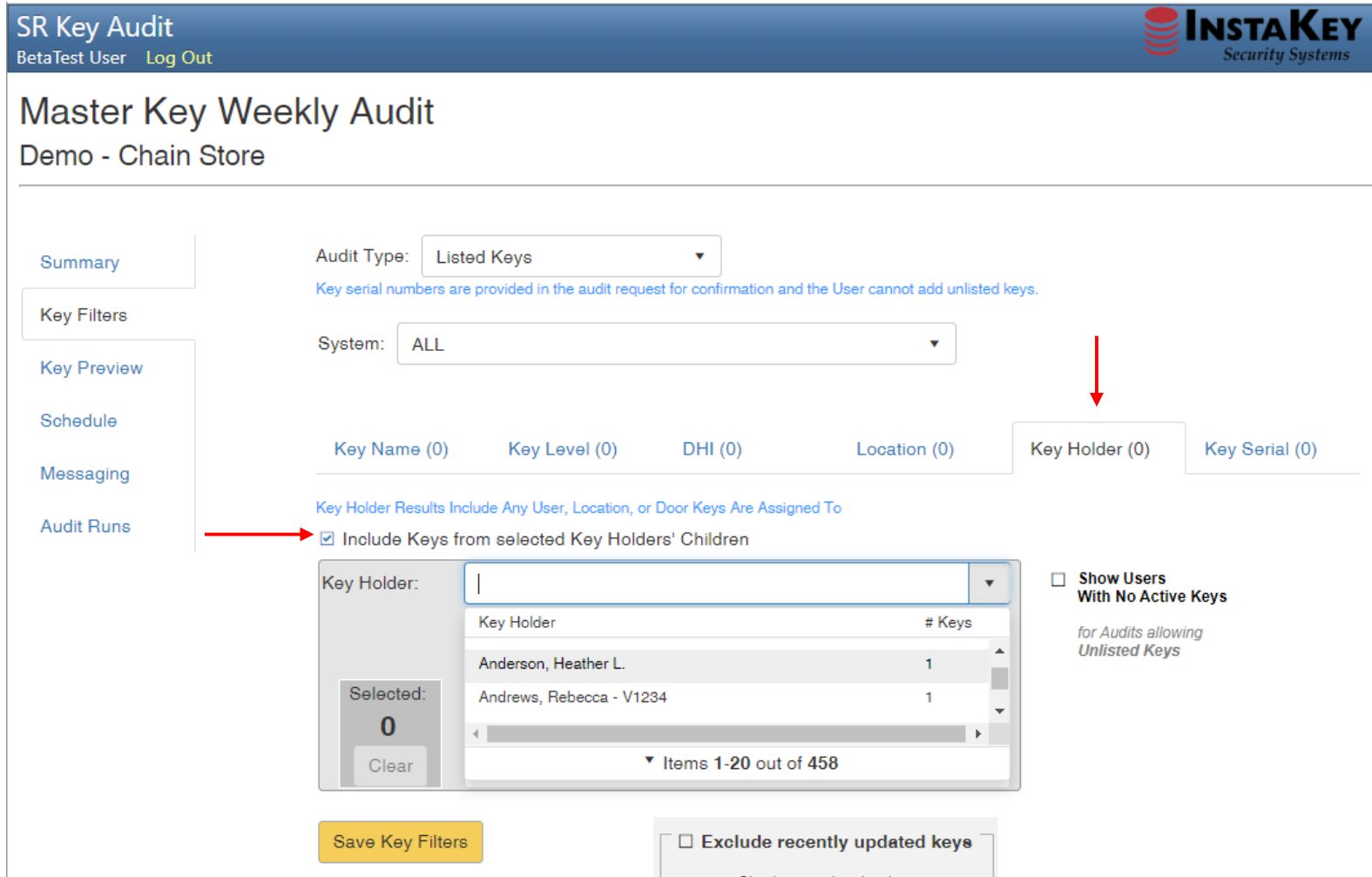
11. Filter by "Key Holder" allows the auditor to be very specific about the keys on audit. Select "Include Keys from selected Key Holders' Children" to quickly select groups by parent.

12. Filtering by "Key Serial" number is the most specific type of filter and allows the user to pinpoint exactly which keys are being audited.

SR Key Audit
Test User   Logout

Master Key Weekly Audit
Demo - Chain Store

| Key Name (0) | Key Level (0) | DHI (0) | Location (0) | Key Holder (0) | Key Serial (0) |

Summary

Key Filters

Key Preview

Schedule

Messaging

Audit Runs

Key Serial:

Key Serial	Key Holder	Status
F2110889	Test, Joseph	Issued
F2219907	Abelia, Janice	Issued
F2219908	Smith, Amanda	Issued

▼ Items **1-1039** out of **1039**

Selected:
0
Clear

Save Key Filters

☐ **Exclude recently updated keys**
Skip keys updated within
▼   ▼
of Audit Run

Return

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13. This particular audit will be for all Master Keys, so only the Level needs to be selected, and all other filters left blank.

14. "Key Preview" shows all keys that will be included in the audit. Keys may be marked "Critical" as needed. Email and Phone information is based off the information listed in SecurityRecords. For any keys without contact information, or to overwrite existing, any/all keys may be selected and updated using the "Email" and or "Phone" fields. *Note that email/phone updates made in audit are for the audit only and do not change Records information.*

SR Key Audit
Test User   Logout

Master Key Weekly Audit
Demo - Chain Store

Summary

Key Filters

Key Preview

Schedule
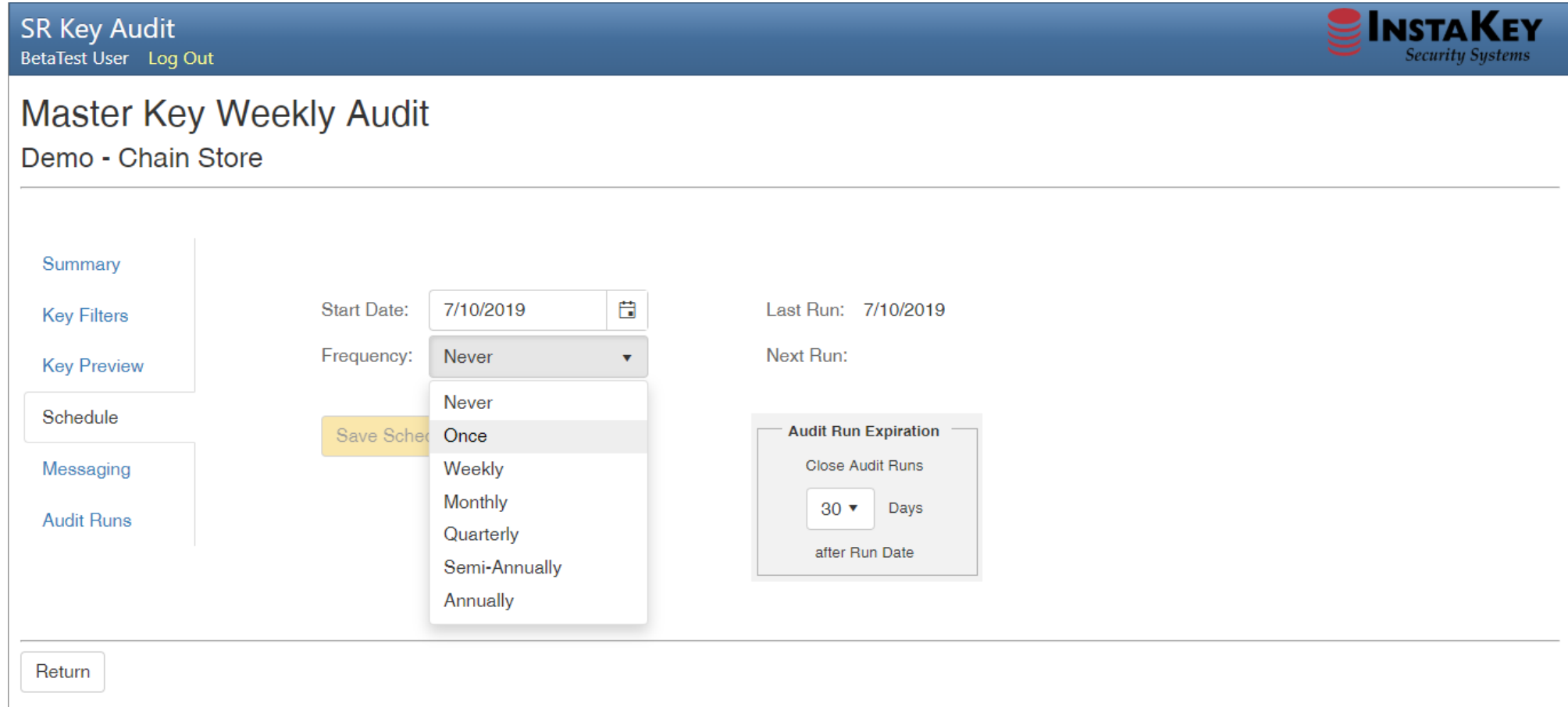
Messaging

Audit Runs

Keys
68

Email ☐   Phone ☐   Critical ☐
Update Selected Keys: [   ] [   ] [Yes ▼] [Save]

(Overridden values are in green.)

☐	Serial #	DHI	System	Key Level	Key Name	Critical	Assigned To	Email	Phone	Key Status	Last Updated
☐	D757368	AA.5	Chain Store Inc. 6-Pin MK (F01)	Master	Store Master		CHAIN STORE 0200 - New York NY			Fire Box	9/14/2008
☐	D757342	AB.2	Chain Store Inc. 6-Pin MK (F01)	Master	Store Master		CHAIN STORE 0784 - New York			Issued	9/14/2008
☐	D757341	AB.2	Chain Store Inc. 6-Pin MK (F01)	Master	Store Master		CHAIN STORE 0784 - New York			Issued	9/14/2008
☐	D757340	AB.2	Chain Store Inc. 6-Pin MK (F01)	Master	Store Master		CHAIN STORE 0784 - New York			Issued	9/14/2008
☐	D757339	AB.2	Chain Store Inc. 6-Pin MK (F01)	Master	Store Master		CHAIN STORE 0784 - New York			Issued	9/14/2008
☐	D869430	AB.2	Chain Store Inc. 6-Pin MK (F01)	Master	Store Master		CHAIN STORE 0784 - New York			Issued	8/25/2004
☐	D869429	AB.2	Chain Store Inc. 6-Pin MK (F01)	Master	Store Master		CHAIN STORE 0784 - New York			Issued	8/25/2004

Return

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15. "Schedule" determines how often the audit will be run. This allows the auditor to build a variety of different audits that run on an automated schedule and can occur as often as needed, with the option to signify when the audit will end.

SR Key Audit
BetaTest User   Log Out

Master Key Weekly Audit
Demo - Chain Store

- Summary
- Key Filters
- Key Preview
- Schedule
- Messaging
- Audit Runs

Email Reminder to Auditor   [Save]

[1 ▼] day(s) before Audit Run

Audit Message

Subject: InstaKey Audit - Please Confirm Keys

Body: Use the link provided in this message to confirm the status of keys under audit.

List Keys: ☐ (applies to Email Only)
Send Type: ☑ Email   ☐ Phone (text message)
Reply Options: ☐ Key Receipt

Escalate Message

[3 ▼] day(s) after Audit Run

Subject: OVERDUE InstaKey Audit - Attention Required

Body: Your confirmation for the status of keys under audit is overdue. Use the link provided in this message to confirm the status of keys under audit.

List Keys: ☐ (applies to Email Only)
Send Type: ☑ Email   ☐ Phone (text message)
Reply Options: ☐ Key Receipt

Copy Message to Supervisor   **Copy Message to Auditor**

[1 ▼] day(s) after Audit Run   [3 ▼] day(s) after Audit Run

16. The "Messaging" screen allows the auditor to customize the message(s) communicated to key holders. All verbiage may be changed in both the subject and body fields. The days before and after can be designated as well for an email reminder to the Auditor (see Summary tab) as well as the escalation messages.

If the User Hierarchy is in use in SecurityRecords, the Copy Message to Supervisor toggle may be utilized. This function will send an escalation to the key holder's direct supervisor prior to the auditor receiving notice of non-compliance.

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17. "Audit Runs" shows the history of times the Audit has been utilized and a high-level summary of the result. Selecting a Run Date will display additional

Master Key Weekly Audit
Demo - Chain Store

Summary

Key Filters

Key Preview

Schedule

Messaging

Audit Runs

Audit Runs (4)

Run Date	Audit Type	Close Date	Expire Date	Listed Keys						Unlisted Keys			
				# Keys	# Confirmed	% Confirmed	Custody: Yes	Custody: No	% Custody	# Users	# Replied	% Replied	Add-On Keys
From / To		From / To	From / To										
7/10/2019	Unlisted Keys	7/31/2019	10/8/2019	-	-	-	-	-	-	1	0	0%	0
7/10/2019	Unlisted Keys	7/10/2019	10/8/2019	-	-	-	-	-	-	1	0	0%	0
7/10/2019	Unlisted Keys	7/10/2019	10/8/2019	-	-	-	-	-	-	1	0	0%	0
7/10/2019	Listed Keys	7/10/2019	10/8/2019	15	0	0%	0	0	0%	-	-	-	-

Return

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18. Selecting any Run Date brings the details of the run, along with the "Message Log" and the option to "Close Audit Run" (or Open if audit is closed).

Audit Run Keys	Message Log	No Custody Keys	Recommendations

				Listed Keys						Open Audit Run
Run Date	Audit Type	Close Date	Expire Date Save	# Keys	# Confirmed	% Confirmed	Custody: Yes	Custody: No	% Custody	
7/10/2019	Listed Keys	7/10/2019	10/8/2019	15	0	0 %	0	0	0 %	

Update Selected Keys:

Email	Phone	Key Status	Critical	Custody		
					Save	✓ Saved

	Serial #	Assigned To	Location	Email	Phone	DHI	Key Name	Key Status	Critical	Last Updated	Last Email	Last Text
										From / To	From / To	From / To
	D1000042	Bailey, Sharon	Chain Store Dept D01 - Ontario	ATestEmail@InstaKey.com		2AA.1	Cashier Only	Issued	No	6/13/2016	7/10/2019	
	D1000064	Alderson, Tami	Chain Store Dept D01 - Ontario	ATestEmail@InstaKey.com		10CA.1	LP Office Only	Issued	No	7/8/2016	7/10/2019	
	D2911793	Myers, Ken	Chain Store Dept D01 - Ontario	ATestEmail@InstaKey.com		CA.4C	Master Control	Issued	No	3/31/2015	7/10/2019	
	D1000066	Bailey, Sharon	Chain Store Dept D01 - Ontario	ATestEmail@InstaKey.com		10CA.1	LP Office Only	Issued	No	6/14/2016	7/10/2019	
	D1000065	Clark, Carolyn	Chain Store Dept D01 - Ontario	ATestEmail@InstaKey.com		10CA.1	LP Office Only	Issued	No	9/12/2016	7/10/2019	
	D2911795	Bailey, Sharon	Chain Store Dept D01 - Ontario	ATestEmail@InstaKey.com		CA.4	Store Master D01	Issued	No	7/10/2019	7/10/2019	
	D2911798	Keller, Kim - 88874	Chain Store Dept D01 - Ontario	ATestEmail@InstaKey.com		CA.4	Store Master D01	Issued	No	3/31/2015	7/10/2019	
	D2911796	Russell, Lisa	Chain Store Dept D01 - Ontario	ATestEmail@InstaKey.com		CA.4	Store Master D01	Issued	No	3/31/2015	7/10/2019	

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19. The new audit is now available to view in Existing Audits

New Audit

Existing Audits (1)

Audit Name	Customer	Open Runs	Start Date	Frequency	Last Run	Next Run	Sharing	Created By	Create Date
Master Key Weekly Audit	Demo - Chain Store		2/8/2019	Daily		2/8/2019	Private	Test User	02/07/2019

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20. Once the audit is started, a notice will go to the Auditor to remind them it has started. Additional notifications will be sent when the audit is closed.

Fri 2/8/2019 9:21 AM

K

InstaKey Audit Started

To   ⊞ _TestEmail

The following Key Audit has started, and key confirm requests have been sent.

Customer:	Demo - Chain Store
Audit Name:	Master Key Weekly Audit
# of Keys:	68
Run Date:	2/8/2019
Frequency:	Daily
Expire Date:	2/15/2019
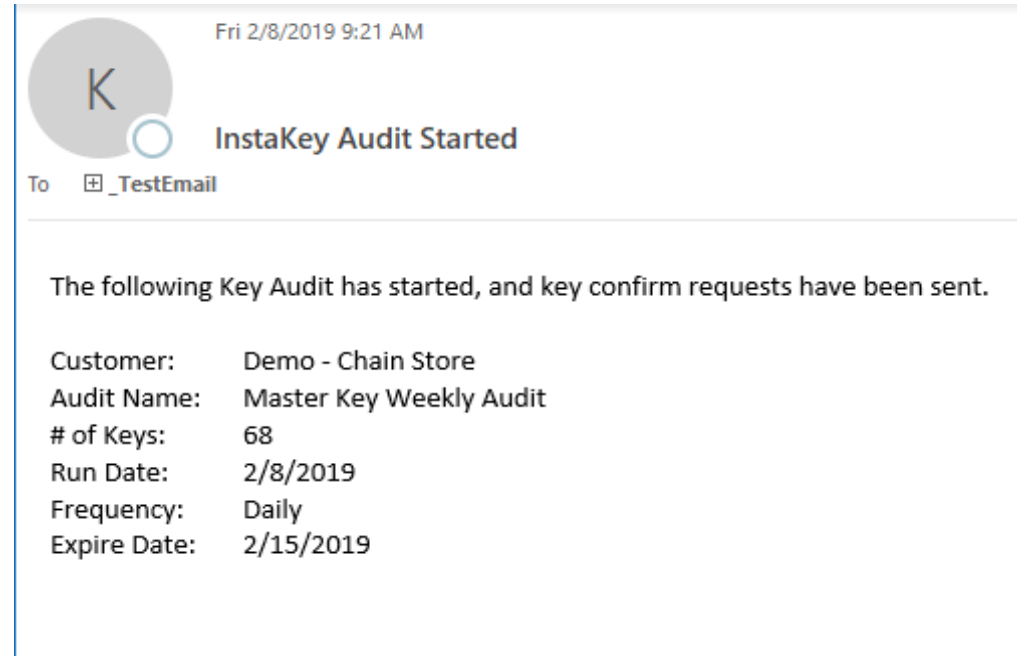
21. All contacts with Email / Phone values on the audit will be sent a notification with a link to update keys.

Fri 2/8/2019 2:45 PM

K

InstaKey Audit - Please Confirm Keys

To   ⊞ _TestEmail

Use the link provided in this message to confirm the status of keys under audit.

Customer:	Demo - Chain Store
Audit Name:	Master Key Weekly Audit
# of Keys:	68
Run Date:	2/8/2019

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22. This is an example message to the Auditor with the scheduled run date approaching. This may be modified in the Messaging tab.

Thu 2/14/2019 12:08 PM

K

InstaKey Audit - Message From Key Holder

To   ⊞ _TestEmail

A personal message has been sent to you regarding the following Key Audit.

Key Holder Contact:
Keys Requested:

Customer:	Demo - Chain Store
Audit Name:	User Specific Audit w/System Filter
# of Keys:	11
Run Date:	2/14/2019
Frequency:	Once

------- Message From KeyHolder -------

Test

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23. After selecting the email link, a key can be updated and confirmed. Keys that need further review may be left blank, and after any key has been confirmed, a Key Receipt option becomes available (see step 24). Should communication to the Auditor be necessary (email recipient is unavailable to participate in audit, has questions, etc.) they can use the Message box to contact the auditor.

D869425		No (Stolen) ▾
D882583		No (Lost) ▾
D869430	CHAIN STORE 0784 - New York	Yes ▾
D869429	CHAIN STORE 0784 - New York	Yes ▾

Confirm Key Custody

Send Message to Auditor (optional)

Send Message

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24. After a key is confirmed a Key Receipt option becomes available. Keys may
be signed for individually, or all at once if All Keys Confirmed is displayed.

Left panel

Please Confirm Your Custody of the Keys Below   Keys Confirmed: 0 of 1

Serial #	Assigned To	In Custody?	☐ Key Receipt
D1000058	User, BetaTest - 00001	Yes ▼	

Confirm Key Custody

Send Message to Auditor (optional):

Are you in possession of any keys not listed above? If so, please list below.

Send Message

Right panel

All Keys Confirmed   Keys Confirmed: 1 of 1

Serial #	Assigned To	In Custody?	☑ Key Receipt
D1000058	User, BetaTest - 00001	Yes ▼	☑

Confirm Key Custody   **Sign Key Receipt**

Send Message to Auditor (optional):

Are you in possession of any keys not listed above? If so, please list below.

Send Message

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25. Selecting "Sign Now" brings up an electronic signature box, after signing, a final preview will be made available before submitting.

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![InstaKey Security Systems logo]

26. In this final step, the receipt may be reviewed for accuracy before submitting. Selecting "Cancel" will return to the signature page. Key Receipts may be customized to include a company logo by providing a hi-res jpg, png, or pdf to CustomerSupport@InstaKey.com

Key Receipt

Key Serial Number(s): D1000058

X_____

BetaTest User   03/21/2019

Assigned By: George W

Cancel   Approve

Digital KeyHolder Update

Sucess!

The Key Receipt for BetaTest User was Successfully Saved.

Close

Sign Now

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27. KeyAudit includes multiple tools for managing progress during and post-audit. "Message Log" is used for reviewing sent requests to confirm messages are going the right way to the right people. This also shows errors for bad numbers if phone requests are being used, helping to identify possible updates to be made for the next scheduled run.

Audit Run Keys	Message Log	No Custody Keys	Recommendations			

Send Date	Message Type	Send Method	Send To	Status	Keys Requested	Keys Confirmed
From / To						
7/10/2019 10:09:56 AM	Audit Run Closed	Email	BetaTestEmail@InstaKey.com	OK		
7/10/2019 9:35:52 AM	Key Confirm Request (Standard)	Email	BetaTestEmail@InstaKey.com	OK	15	
7/10/2019 9:35:51 AM	Audit Run Started	Email	BetaTestEmail@InstaKey.com	OK		

28. "Add-On Keys" (Unlisted & Hybrid Audits Only) allows the auditor to view both the keys confirmed as well as key serial numbers submitted that do not match anything in Records. Updates may be made to valid serial numbers while the invalid serials may be reviewed further. The "Add-On Keys" tab is converted to "No Custody Keys" on Listed audits and displays keys assigned to a key holder confirming they no longer have that key.

Audit Run Keys | Message Log | **Add-On Keys** | Recommendations

Submitted Keys - Valid Key Serial Number (2)

Assign To ● Users ○ Locations ○ Doors   Key Status
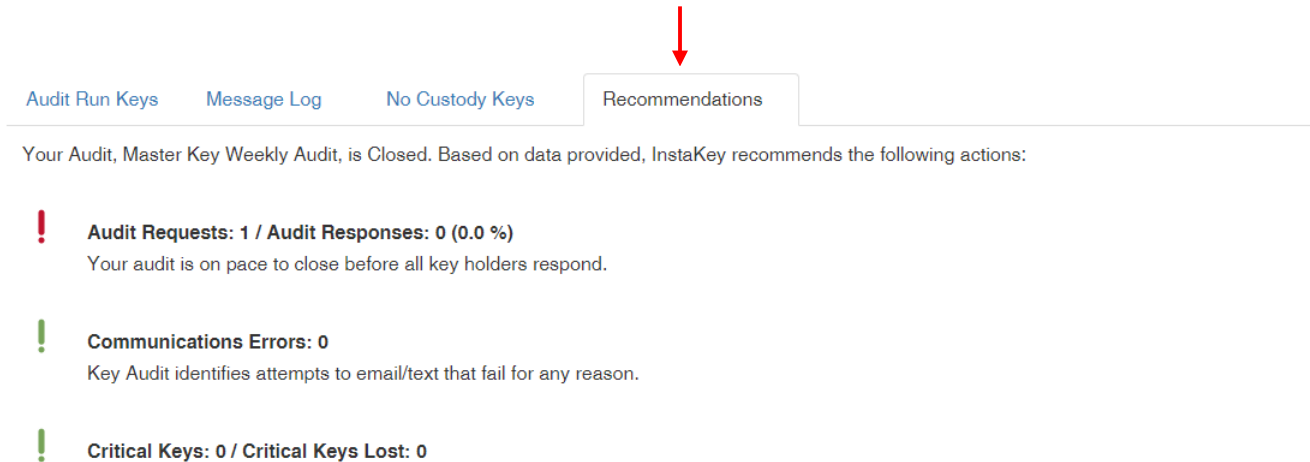
Update Selected Keys: Save

	Serial #	Submitted By	Submitted From	Submit Date	Assigned To	Key Status	Last Updated	Update User
				From / To			From / To	
☐	d1000039	User, BetaTest - 00001		7/29/2019	User, BetaTest - 00001	Issued	8/6/2019	
☐	d1000058	User, BetaTest - 00001		7/29/2019	User, BetaTest - 00001	Issued	3/19/2019	User, BetaTest - 00001

Submitted Keys - Invalid Key Serial Number (2)

Serial #	Submitted By	Submitted From	Submit Date
			From / To
d1000038	User, BetaTest - 00001		7/29/2019
1000039	User, BetaTest - 00001		7/29/2019

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29. "Recommendations" are updated in real time and allow auditors to gauge various progress/hinderance areas. Each field provides both a high-level summary as well as InstaKey feedback on possible actions needed.

Audit Run Keys   Message Log   No Custody Keys   **Recommendations**

Your Audit, Master Key Weekly Audit, is Closed. Based on data provided, InstaKey recommends the following actions:

! **Audit Requests: 1 / Audit Responses: 0 (0.0 %)**
Your audit is on pace to close before all key holders respond.

! **Communications Errors: 0**
Key Audit identifies attempts to email/text that fail for any reason.

! **Critical Keys: 0 / Critical Keys Lost: 0**

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