

INSTAKEY Security Systems

Digital KeyHolder Update Tutorial Release 4.0.1 - 3/29/2019





Digital KeyHolder Update Instructions

There are 3 available options for logging in, see below:

- Log In via Email Access Pages 3 17
- Log In via Certification Authentication Pages 18 31
- Log In via SecurityRecords Credentials Pages 32 42





Digital KeyHolder Update Instructions

• Log In via Email Access

7456 W. 5th Ave, Lakewood CO 80226 P: 800-316-5397 www.instakey.com Making KeyControl[®] simple.



 To begin, Key Holders will navigate to: <u>https://www.securityrecords.com/srdigitalkeyholder/mainsite/login.aspx</u>
 For first time access, press the "Register New User" link at the bottom of the page.

Key Holder Update			
Login Name:			
ProtectedID			
Login Password:			
	Forgot Password / ProtectedID / Change Email		
	Login		
(Register New User		





2. Once clicked, an email verification page will ask to input First Name, Last Name and email address. **User must input their work email.** Any email address must be from a verified domain or an error message will appear.



Use the following form to request access to the Digital Key Holder Update Program. Upon Submitting the form, you will be sent an email with a link to complete your registration.

First Name:	BetaTest
Last Name:	User
Email Address:	BetaTestEmail@InstaKey.co
V I'm not a robot	reCAPTCHA Privacy - Terms
Register	





3. An email will be sent with a link. It's important to note that if your IT department has not white listed InstaKey.com, this email may end up in your junk folder. Click on the link provided to be sent to the registration page.



Tue 3/19/2019 10:32 AM CustomerSupport@instakey.com Digital KeyHolder Update Verification

To 🗄 **TestEmail**

In order to use InstaKey's Digital KeyHolder Update program, you must verify receipt of this message. Verification allows you to register for the program.

Follow the link below to verify your email.

Digital KeyHolder Update Verification

If you have any problems, or need help, please contact InstaKey Customer Support at 800-316-5397

InstaKey Customer Support





4. At the registration page, search for yourself via employee ID. If found, the First Name, Last Name and email address fields will be prepopulated. Fill out all fields and press Register. This will send an additional email with a protected ID.

EINSTAKE Security System	Y Ins			
Employee ID:	Lookup			
irst Name:	BetaTest	Last Name:	User	
Choose Login Name:	BetaTestUser			
hoose Password:		Password Again:		
mail Address:	BetaTestEmail@InstaKey.com	Confirm Email:	BetaTestEmail@InstaKey.com	
ecurity Juestion:	Name of favorite pet	Security Response:	Fido	

Making KeyControl[®] simple.



5. Once registered you will be brought back to the Login Screen. On the login screen, enter login name, protected ID (supplied via email) and password.

Digital KeyHolder Update				
Login Name:	BetaTestUser]		
ProtectedID:]		
Password:	•••••			
Forgot: UserName / Password / ProtectedID				
Login				
Register New User				
Feedback / Suggestions				
©InstaKey Security Systems Powered By Security F		Powered By SecurityRecords.com		

7456 W. 5th Ave, Lakewood CO 80226 P: 800-316-5397 www.instakey.com Making <mark>KeyControl®</mark> simple.



6. Select a Key. Keys are ordered by serial number and displays who currently owns the key.







7. Search by Employee ID allows quick access by ID. Upon hitting search, the employee name with ID will appear below.



D1000058-Store Master D01-Chain Store Dept D01 - Ontario

- Search By Employee ID
- Assign To Location
- Search Employees
- Add User

Search by Employee ID:

Search





8. To Assign a Key back to the location, select "Assign to Location".

Digital KeyHo	older Update	Demo - Chain Store
	Y	Log Out
Location Name	Chain Store Dept D01 - Ontario	Name: BetaTest User Email: BetaTestEmail@InstaKey.com Location: Chain Store Dept D01 - Ontario
(and	Select from Available Keys: (Serial Number - Name - Status - Assigned To - Employee ID)	Feedback / Suggestions
W.	D1000058-Store Master D01-Chain Store Select Key (s)	
D1000058-Stor	re Master D01-Chain Store Dept D01 - Ontario	

Dioooso-store master Dor-chain store Dept

- Search By Employee ID
- Assign To Location
- Search Employees
- Add User

Search for a Location

Clear Search







9. Only keys assigned to employees of the store/branch will show in the initial dropdown. By typing in a name it will search the entire company directory.



Search By Employee ID

Assign To Location

Search Employees

Add User

Search for an Employee

Clear Search

You must remove all text and type in a value to search entire employee directory

▼







10. One or many keys may be updated simultaneously. Before pressing "Submit Key Log Update", to obtain a key receipt for the keys select, click "E-Sign"

Digital KeyHolder Update Demo - Chain Store BetaTestEmail@InstaKey.com Email: Location: Chain Store Dept D01 - Ontario Select from Available Keys: Feedback / Suggestions (Serial Number - Name - Status - Assigned To - Employee ID) • Select Key (s) Select Key Search By Employee ID Keys to Be Assigned: 1 Assign To Location Serial Issue To E-Signature Remove Search Employees Number(s) Add User × User, BetaTest -D1000058 E-Sign User, BetaTest - 00001 Ŧ 00001 Clear Search You must remove all text and type in a value to search entire Submit Key Log Update employee directory

Add Key(s) >





11. A signature request may be sent via text or email to users not on site, or, by pressing "Sign Now" an Esignature pad will allow the key holder to sign for the key on site.







12. Once signed, select to preview the Key Receipt.

Digital KeyHolder Update	Demo - Chain Store
× BT. User	Log Out
Submit Clear Cancel Text Number Send Text	
Request Digital signature by email Email Address OR	
Sign Now Previous Page	

Making KeyControl[®] simple.



13. This signature will be attached to a PDF and will display in the Key Receipt below. Click Approve to attach the key receipt to the User in SecurityRecords. A copy will also be sent both to the key holder and person assigning the key.

	Company	Demo - Chain Store	Digital KeyHolder Update Sucess!
Key Receipt			The Key Receipt for User, BetaTest - 00001 was Successfully Saved.
Key Serial Number(s): D1000058		7	Close
BT. User			
X			•
Assigned By: BetaTest User		Tue 3/19/2019 3:: CustomerSup Digital Key Rece To ⊡_TestEmail Cc ⊡_TestEmail	ao PM oport@InstaKey.com ipt
	Approve	User_BetaTest - 0000	1_3-19-2019_15_30_25.pdf _
		Please find the attached	copy of the Key Receipt for your recent key reassignment.





14. Once all keys are signed for press Submit Keys to see a list of newly assigned keys & all keys belonging to this store/branch. Log Out if complete, or start back at the Select Keys dropdown for another assignment.

Digital KeyHo	lder Update						Demo - Chain Store
							Log Out
Location Name	hain Store Dept D01 - Onta	rio				Name: Email:	BetaTest User BetaTestEmail@InstaKey.com
and a	Select from Available Ke (Serial Number - Name	eys: · Status - Assigned To -	Employee ID)			Location Feedbac	n: Chain Store Dept D01 - Ontario k / Suggestions
N.	Select Key		▼ Select Ke	y (s)			
✓ 1 key has just been updated. Reset Form							
Key DHI	Key Name	Serial Number	Assigned To	Key Status	Step		

BetaTest User

BetaTest User

5

1

Issued

Issued

CA

BB1

Store Master D01

D1000058

D1000058





Digital KeyHolder Update Instructions

• Log In via Certification Authentication

Making <mark>KeyControl®</mark> simple.



1. To begin, Key Holders will navigate to: https://www.securityrecords.com/srdigitalkeyholder/mainsite/login.aspx For return users, press the "Register New User" link at the bottom of the page.

Key Holder Update				
Login Name:				
ProtectedID				
Login Password:				
(Forgot Password / ProtectedID / Change Email			





2. Once clicked, an email verification page will ask to input First Name, Last Name and email address. **User must input their work email.** Any email address must be from a verified domain or an error message will appear.



Use the following form to request access to the Digital Key Holder Update Program. Upon Submitting the form, you will be sent an email with a link to complete your registration.

First Name:	BetaTest
Last Name:	User
Email Address:	BetaTestEmail@InstaKey.co
V I'm not a robot	reCAPTCHA Privacy - Terms
Register	





3. An email will be sent with a link. It's important to note that if your IT department has not white listed InstaKey.com, this email may end up in your junk folder. Click on the link provided to be sent to the registration page.



Tue 3/19/2019 10:32 AM CustomerSupport@instakey.com Digital KeyHolder Update Verification

To 🗄 **TestEmail**

In order to use InstaKey's Digital KeyHolder Update program, you must verify receipt of this message. Verification allows you to register for the program.

Follow the link below to verify your email.

Digital KeyHolder Update Verification

If you have any problems, or need help, please contact InstaKey Customer Support at 800-316-5397

InstaKey Customer Support





4. As a returning user, selecting the link in the email sent directs to the store select page.



You have been granted one day access to the Digitial Key Holder Update program.

To Continue, enter the Store Number for which you wish to update keys, including any leading zeros if they exist.

Store Number



Submit





6. Select a Key. Keys are ordered by serial number and displays who currently owns the key.







7. Search by Employee ID allows quick access by ID. Upon hitting search, the employee name with ID will appear below.



D1000058-Store Master D01-Chain Store Dept D01 - Ontario

- Search By Employee ID
- Assign To Location
- Search Employees
- Add User

Search by Employee ID:

Search





8. To Assign a Key back to the location, select "Assign to Location".

Digital KeyHo	older Update	Demo - Chain Store
	Y	Log Out
Location Name	Chain Store Dept D01 - Ontario	Name: BetaTest User Email: BetaTestEmail@InstaKey.com Location: Chain Store Dept D01 - Ontario
(and	Select from Available Keys: (Serial Number - Name - Status - Assigned To - Employee ID)	Feedback / Suggestions
W.	D1000058-Store Master D01-Chain Store Select Key (s)	
D1000058-Stor	re Master D01-Chain Store Dept D01 - Ontario	

Dioooso-store master Dor-chain store Dept

- Search By Employee ID
- Assign To Location
- Search Employees
- Add User

Search for a Location

Clear Search







9. Only keys assigned to employees of the store/branch will show in the initial dropdown. By typing in a name it will search the entire company directory.



Search By Employee ID

Assign To Location

Search Employees

Add User

Search for an Employee

Clear Search

You must remove all text and type in a value to search entire employee directory

▼







10. One or many keys may be updated simultaneously. Before pressing "Submit Key Log Update", to obtain a key receipt for the keys select, click "E-Sign"

Digital KeyHolder Update Demo - Chain Store BetaTestEmail@InstaKey.com Email: Location: Chain Store Dept D01 - Ontario Select from Available Keys: Feedback / Suggestions (Serial Number - Name - Status - Assigned To - Employee ID) • Select Key (s) Select Key Search By Employee ID Keys to Be Assigned: 1 Assign To Location Serial Issue To E-Signature Remove Search Employees Number(s) Add User × User, BetaTest -D1000058 E-Sign User, BetaTest - 00001 Ŧ 00001 Clear Search You must remove all text and type in a value to search entire Submit Key Log Update employee directory

Add Key(s) >





11. A signature request may be sent via text or email to users not on site, or, by pressing "Sign Now" an Esignature pad will allow the key holder to sign for the key on site.







12. Once signed, select to preview the Key Receipt.

Digital KeyHolder Update	Demo - Chain Store
× BT. User	Log Out
Submit Clear Cancel Text Number Send Text	
Request Digital signature by email Email Address OR	
Sign Now Previous Page	

Making KeyControl[®] simple.



13. This signature will be attached to a PDF and will display in the Key Receipt below. Click Approve to attach the key receipt to the User in SecurityRecords. A copy will also be sent both to the key holder and person assigning the key.

	Company Logo	Demo - Chain Store	Digital KeyHolder Update Sucess!
Key Receipt			The Key Receipt for User, BetaTest - 00001 was Successfully Saved.
Key Serial Number(s): D1000058		7	Close
BT. User			
XUser, BetaTest - 00001 03/19/2019			
Assigned By: BetaTest User		To ⊕_TestEmail	pport@InstaKey.com ipt
Cancel	Approve	User_BetaTest - 0000 19 KB	1_3-19-2019_15_30_25.pdf _
		Please find the attached	copy of the Key Receipt for your recent key reassignment.





14. Once all keys are signed for press Submit Keys to see a list of newly assigned keys & all keys belonging to this store/branch. Log Out if complete, or start back at the Select Keys dropdown for another assignment.

Digital KeyHo	lder Update						Demo - Chain Store
	r						Log Out
Location Name	Chain Store Dept D01 - Onta	rio				Name: Email:	BetaTest User BetaTestEmail@InstaKey.com
and a	Select from Available Keys: (Serial Number - Name - Status - Assigned To - Employee ID)				Location Feedbac	Location: Chain Store Dept D01 - Ontario Feedback / Suggestions	
N.	Select Key Select Key Select Key (s)						
🗹 1 key has j	ust been updated.	(Reset Form				
Key DHI	Key Name	Serial Number	Assigned To	Key Status	Step		

BetaTest User

BetaTest User

5

1

Issued

Issued

CA

BB1

Store Master D01

D1000058

D1000058





Digital KeyHolder Update Instructions

• Log In via SecurityRecords Credentials





 To begin, Key Holders will navigate to: <u>https://www.securityrecords.com/srdigitalkeyholder/mainsite/login.aspx</u>
 Users with SecurityRecords.com credentials may log in without registering.

Key Holder Update



Login Name:	
ProtectedID	
Login Password:	

Forgot Password / ProtectedID / Change Email







2. Select a Key. Keys are ordered by serial number and displays who currently owns the key.







3. Search by Employee ID allows quick access by ID. Upon hitting search, the employee name with ID will appear below.



D1000058-Store Master D01-Chain Store Dept D01 - Ontario

- Search By Employee ID
- Assign To Location
- Search Employees
- Add User

Search by Employee ID:

Search

Location: Chain Store Dept D01 - Ontario





4. To Assign a Key back to the location, select "Assign to Location".

Digital KeyHo	older Update	Demo - Chain Store	
	Y s	Log Out	
Location Name	Chain Store Dept D01 - Ontario	Name: BetaTest User Email: BetaTestEmail@InstaKey.com	
000	Select from Available Keys: (Serial Number - Name - Status - Assigned To - Employee ID)	Location: Chain Store Dept D01 - Ontario Feedback / Suggestions	
W.	D1000058-Store Master D01-Chain Store		
D1000058-Stor	e Master D01-Chain Store Dept D01 - Ontario		

- Search By Employee ID
- Assign To Location
- Search Employees
- Add User



7456 W. 5th Ave, Lakewood CO 80226 P: 800-316-5397 www.instakey.com





5. Only keys assigned to employees of the store/branch will show in the initial dropdown. By typing in a name it will search the entire company directory.



Search By Employee ID

Assign To Location

Search Employees

Add User

Search for an Employee

Clear Search

You must remove all text and type in a value to search entire employee directory

▼







6. One or many keys may be updated simultaneously. Before pressing "Submit Key Log Update", to obtain a key receipt for the keys select, click "E-Sign"

Digital KeyHolder Update Demo - Chain Store BetaTestEmail@InstaKey.com Email: Location: Chain Store Dept D01 - Ontario Select from Available Keys: Feedback / Suggestions (Serial Number - Name - Status - Assigned To - Employee ID) • Select Key (s) Select Key Search By Employee ID Keys to Be Assigned: 1 Assign To Location Serial Issue To E-Signature Remove Search Employees Number(s) Add User × User, BetaTest -D1000058 E-Sign User, BetaTest - 00001 Ŧ 00001 Clear Search You must remove all text and type in a value to search entire Submit Key Log Update employee directory

Add Key(s) >

Making

KeyControl[®]

simple.



7. A signature request may be sent via text or email to users not on site, or, by pressing "Sign Now" an Esignature pad will allow the key holder to sign for the key on site.







8. Once signed, select to preview the Key Receipt.

Digital KeyHolder Update	Demo - Chain Store
× BT. User	Log Out
Submit Clear Cancel Text Number Send Text	
Request Digital signature by email Email Address OR	
Sign Now Previous Page	

Making KeyControl[®] simple.



9. This signature will be attached to a PDF and will display in the Key Receipt below. Click Approve to attach the key receipt to the User in SecurityRecords. A copy will also be sent both to the key holder and person assigning the key.

	Company Logo	Demo - Chain Store	Digital KeyHolder Update Sucess!
Key Receipt			The Key Receipt for User, BetaTest - 00001 was Successfully Saved.
Key Serial Number(s): D1000058			Close
BT. User			
XUser, BetaTest - 00001 03/19/2019			•
Assigned By: BetaTest User		To ETestEmail	apport@InstaKey.com #ipt
Cancel	Approve	User_BetaTest - 0000)1_3-19-2019_15_30_25.pdf
		Please find the attached	d copy of the Key Receipt for your recent key reassignment.





10. Once all keys are signed for press Submit Keys to see a list of newly assigned keys & all keys belonging to this store/branch. Log Out if complete, or start back at the Select Keys dropdown for another assignment.

Digital KeyHol	lder Update						Demo - Chain Store
	r						Log Out
Location Name	hain Store Dept D01 - Onta	rio				Name: Email:	BetaTest User BetaTestEmail@InstaKey.com
Con la	Select from Available Ko (Serial Number - Name	eys: • Status - Assigned To -	Employee ID)	_		Location Feedbac	። Chain Store Dept D01 - Ontario k / Suggestions
N.	Select Key		▼ Select Ke	ry (s)			
🗹 1 key has ji	ust been updated.	I	Reset Form				
Key DHI	Key Name	Serial Number	Assigned To	Key Status	Step		

5

1

Issued

Issued

BetaTest User

BetaTest User

D1000058

D1000058

CA

BB1

Store Master D01





INSTAKEY Security Systems

Digital KeyHolder Update Tutorial Release 4.0.1 - 3/29/2019

