

**SecurityRecords.com<sup>®</sup>**

***VERSION 3.7***

***SOFTWARE RELEASE  
NOTIFICATION***

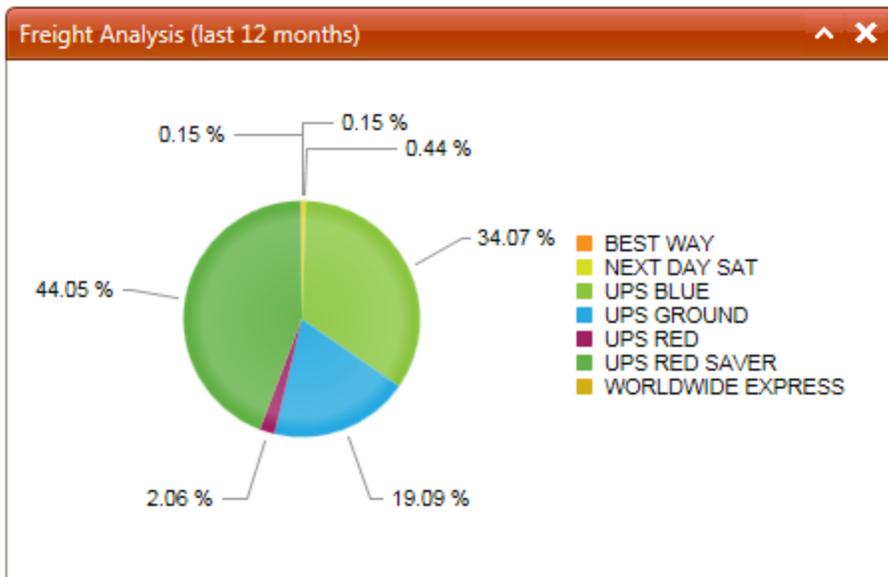
**Making  
KeyControl<sup>™</sup>  
Simple.**

## KeyControl® Dashboard – Freight Analysis

The **Freight Analysis** chart reflects percentages of specific Ship Methods processed in the previous twelve (12) month period. To receive a detailed report of the specific orders Ship Method, click on the pie chart selection that corresponds to the method and the chart will prompt the numeric quantity and the detailed Orders report for further evaluation. Additional filtering can also be filterable by clicking on the legend to add/remove freight types.

The detailed **Freight Analysis** drill-down report reflects the Order Number, Ship Date, Receiving Location, Order Type, and Ship Method used. If a specific Order is in question, click on the Order Number and SecurityRecords.com® will be redirected to the Order Detail page for the particular Order's history. This report can also be easily revised by date and queried for export to Excel.

### Example:



**Freight Analysis**  
Demo - Chain Store

Start Month:  

End Month:  

Filter Order Type:

Filter Ship Method:

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Page size: All 2 items in 1 pages

Order Number	Close Date	Send To	Order Type	Ship Method
<a href="#">430</a>	12-15-2014	Chain Store Dept D01 - Ontario	Rekey Kit(s) - Std.	UPS GROUND
<a href="#">416</a>	08-12-2014	CHAIN STORE 0012 - Philadelphia PA	Lock Hardware	UPS GROUND

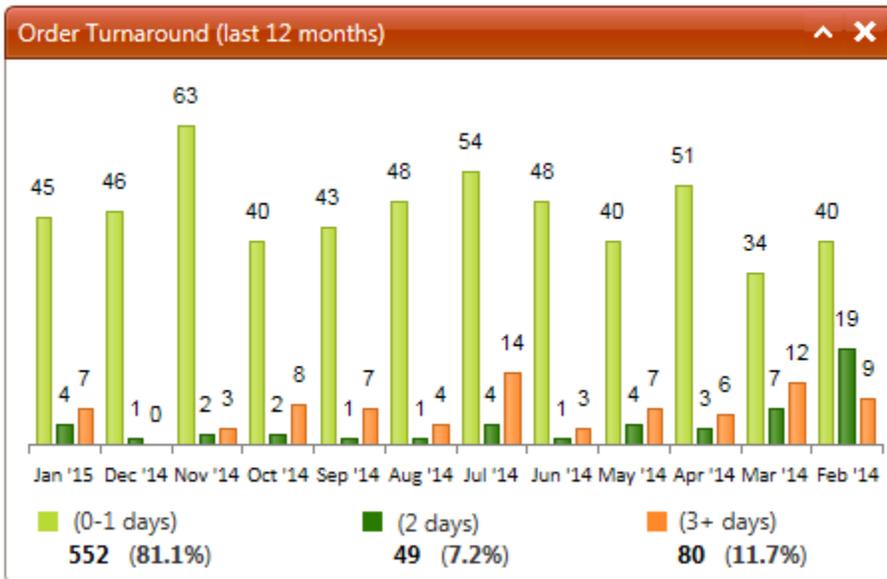
Page size: All 2 items in 1 pages

## KeyControl® Dashboard – Order Turnaround Time

The **Order Turnaround** chart provides a quick overview of the order fulfillment turnaround of Orders processed in SecurityRecords.com®. From the time the Order is entered, to the time the Order is closed and shipped, the graph displays the Orders in three (3) categories: 0-1 Days, 2 Days, 3+ days. To receive a detailed monthly report of the order fulfillment events, click on the chart's bar that corresponds to the month/selection in question.

The detailed **Order Turnaround** drill-down report reflects which orders were fulfilled within the timeframe selected. For further evaluation, just click on the Order Number in question for additional details regarding that particular material order request. This report can also be easily revised by date and queried for export to Excel.

### Example:



### Order Turnaround

Demo - Chain Store

Start Month:

End Month:

Filter Order Speed:

**Expedited: 2 (100.0%)**     
 **Standard: 0 (0.0%)**     
 **Overdue: 0 (0.0%)**     
 **Total: 2**  
0 - 1 days      2 days      3+ days

Order Number	Shipped To	Create Date	Close Date	# Days	Order Speed
432	Chain Store Dept D04 - Riverside	1/8/2015	1/8/2015	0	Expedited
433	Chain Store Dept D04 - Riverside	1/16/2015	1/16/2015	0	Expedited

## Key Detail – Key Name Addition

The **Key Name Definition** has been added to the Key Detail page. If a Key Name has been created, it will now be displayed on this page. With the ability to view this information on the Key Detail page, the End User has more visibility of the key type that is being issued/updated.

Please contact InstaKey Customer Support if you would like more information on how to assign Key Names in your database.

### Example:

#### Key Detail

<b>Key:</b> D1000066	<b>Key Actions</b> <a href="#">Update Key</a> <b>Reports</b> <a href="#">Cylinder / Key Report</a> <a href="#">View Key History</a> <b>Other Functions</b> <a href="#">Add User</a> <a href="#">Attachments (0)</a>
<b>Key Name:</b> LP Office Only	
<b>System:</b> Chain Store CSD 5X5 MK (D04)	
<b>Step/Type:</b> 1	
<b>From Order:</b> <a href="#">377</a>	
<b>Door Association:</b> <a href="#">10CA</a>	
<b>Currently Assigned To:</b> Doe, Jane	
<b>Status:</b> Issued <input type="button" value="v"/>	
<b>Reassign Key:</b> <input checked="" type="radio"/> User <input type="radio"/> Location <input type="radio"/> Door <input type="text" value="type here to filter list"/> <input type="button" value="v"/>	
Last Updated by: Wulf, Ashley on 1/7/2015 1:14:27 PM	

## Cylinder/Key Report – Show All Button

A **Show All** button has been added to the Cylinder/Key Report page, so the End User is able to filter for all cylinders and keys associated to the door or location. Having the visibility of all associated cylinders and keys provides the historical tracking of cores/keys that have been deactivated or are not currently in use.

The Cylinder/Key Report will continue to default to the **Show Active Only** representation.

### Example:

#### Show Active Only

**Cylinder/Key Report**

**Location Name**  
[CHAIN STORE 0029 - Manhasset NY](#)

**Cylinders:** 12 (7 Active)

**System:** Chain Store Stores SKD (FJ,FK)  Show Active Only  Show All

Records: 4 page: 1 of 1

Cylinder DHI	Door Name	Keyway	# Cylinder	# Active
SKD6	<a href="#">0029: Cash Wraps(2)</a>	FJ	2	2
SKD6	<a href="#">0029: Back Door Panic Bar</a>	FJ	4	1
SKD6	<a href="#">0029: Front Doors(4)</a>	FJ	5	4

#### Show All

**Cylinder/Key Report**

**Location Name**  
[CHAIN STORE 0029 - Manhasset NY](#)

**Cylinders:** 12 (7 Active)

**System:** Chain Store Stores SKD (FJ,FK)  Show Active Only  Show All

Records: 4 page: 1 of 1

Cylinder DHI	Door Name	Keyway	# Cylinder	# Active
SKD6	<a href="#">0029: Cash Wraps(2)</a>	FJ	2	2
SKD6	<a href="#">0029: Back Door Panic Bar</a>	FJ	4	1
SKD6	<a href="#">0029: Front Doors(4)</a>	FJ	5	4
SKD6	<a href="#">0029: Outer Exit Door</a>	FJ	1	0

## Order Type – Additional Selection

Additional selections have been added to the Order Detail screen's Order Type drop-down menu. **Add Core(s)** and **Master Key(s)** are now available options in the Order Type menu. These additions allow for further differentiation and classification of the Order's contents.

By using the Order Type field selection accurately, the KeyControl® Dashboard results display more detailed information.

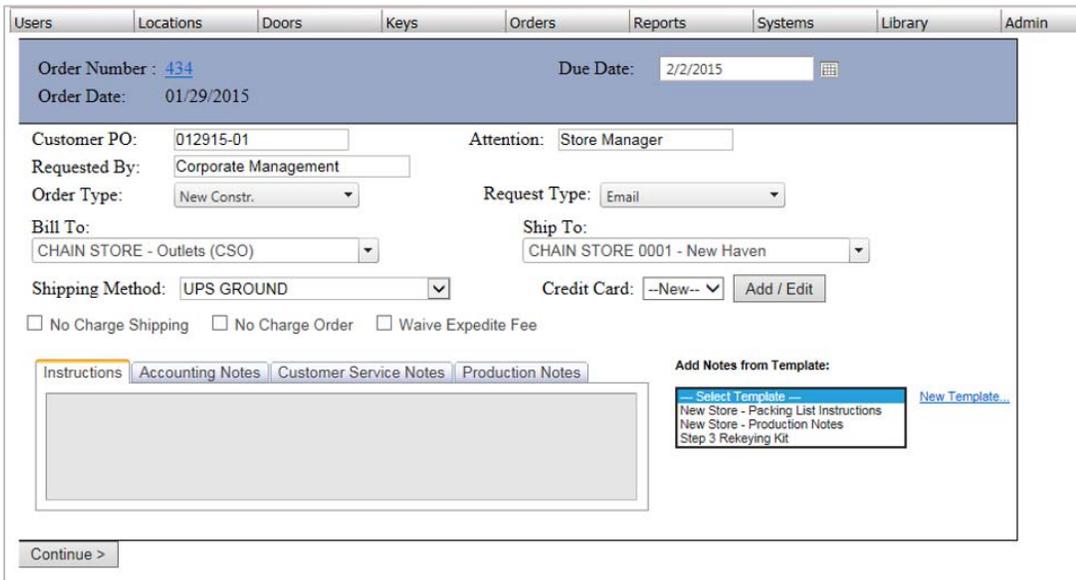
### Example:

The screenshot displays the 'Order Detail' screen for Order Number 434. The interface includes fields for Order Date (01/29/2015), Due Date (2/2/2015), Customer PO (012915-01), and Requested By (Corporate Management). The 'Order Type' dropdown menu is open, showing a list of options: Add. Key(s), Control Key, Fire Key, Labor, Lock Hardware, Master Key(s) (highlighted with a red circle), New Constr., Recore, Rekey Kit(s) - Emgcy, Rekey Kit(s) - Std., Relocate, Remodel, Repl. Key(s), Return, Store Conversion, and Warranty. Other fields include Attention (Store Manager), Request Type (Email), Ship To (CHAIN STORE 0001 - New Haven), and Shipping Method (Labor). The 'Add Notes from Template' section is also visible.

## Order Instructions – Add Notes from Templates

An **Add Notes from Template** feature has been added to the Order Detail screen, allowing the End User to quickly add common template notes and instructions for more efficient order processing. These new templates can be created for commonly used Instructions and Notes provided on each Packing List. Once created, the templates can be named, used, modified, and placed in the desired notes fields for quick, uniform order processing.

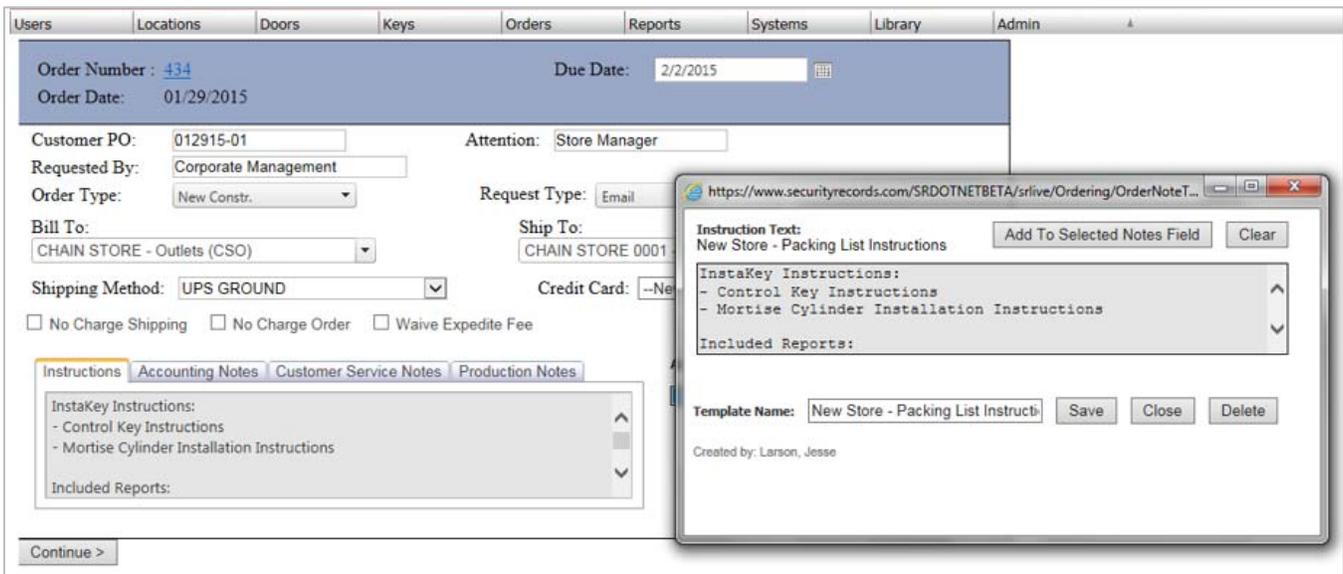
### Example:



The screenshot shows the 'Order Detail' screen for Order Number 434. The 'Add Notes from Template' section is highlighted, showing a dropdown menu with the following options:

- Select Template
- New Store - Packing List Instructions
- New Store - Production Notes
- Step 3 Rekeying Kit

There is also a 'New Template...' link next to the dropdown.



The screenshot shows the 'Order Detail' screen with the 'Add Notes from Template' dialog box open. The dialog box contains the following information:

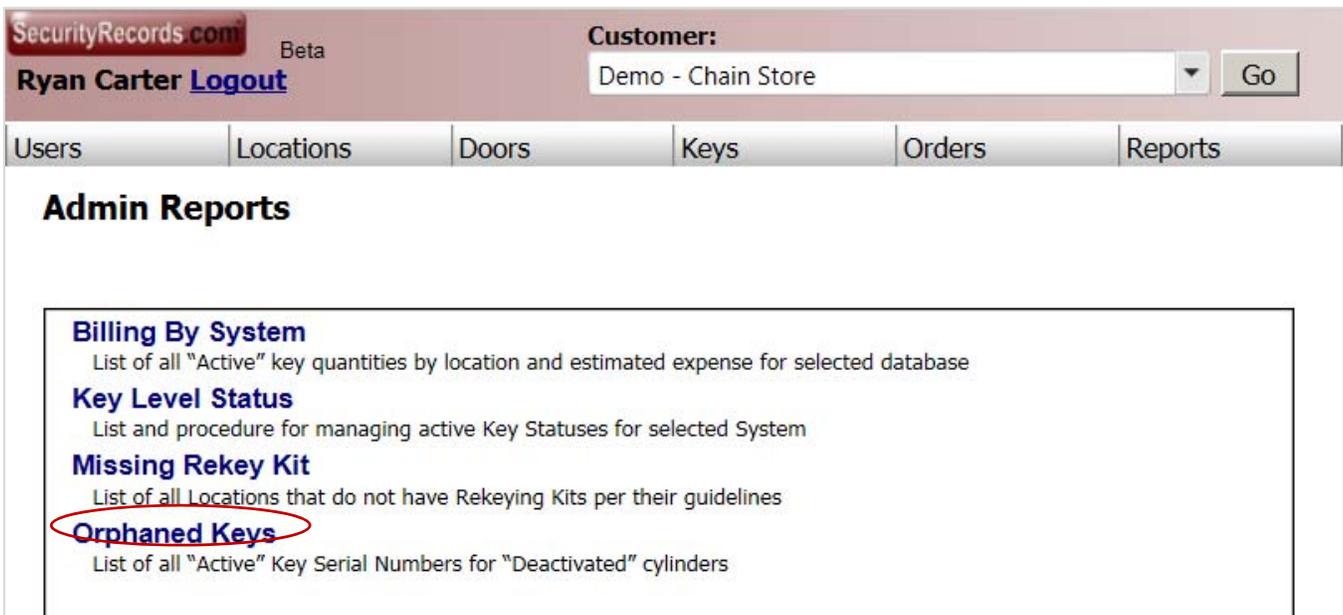
- Instruction Text:** New Store - Packing List Instructions
- InstaKey Instructions:**
  - Control Key Instructions
  - Mortise Cylinder Installation Instructions
- Included Reports:**
- Template Name:** New Store - Packing List Instructi
- Buttons:** Add To Selected Notes Field, Clear, Save, Close, Delete
- Created by:** Larson, Jesse

## Reports – Orphaned Keys – Toggle Update

A new **Toggle Update** feature has been added to the Orphaned Keys report for improved data management. An Orphaned key is an active key that does not have any active cylinders to operate (closed stores, removed cores, etc.). While reviewing this report that identifies keys that no longer have a cylinder to function, the End User can quickly select all of them and update in a single click, providing much more efficiency for data cleansing.

Please contact InstaKey Customer Support if you would like more information on Orphaned Keys in your database.

### Example:



SecurityRecords.com Beta Customer: Demo - Chain Store  
 Ryan Carter Logout Go

Users Locations Doors Keys Orders Reports

### Admin Reports

- Billing By System**  
List of all "Active" key quantities by location and estimated expense for selected database
- Key Level Status**  
List and procedure for managing active Key Statuses for selected System
- Missing Rekey Kit**  
List of all Locations that do not have Rekeying Kits per their guidelines
- Orphaned Keys**  
List of all "Active" Key Serial Numbers for "Deactivated" cylinders

**Orphaned Keys** Deactivated  Update Key Status

Active Keys that do not operate any Active Cylinders

Key Serial Number	Keyway	Issued To	Key Status	System	DHI	Step / Type	<input checked="" type="checkbox"/>
D796831	FJ	CHAIN STORE 0099 - Staten Island NY	Issued	Chain Store Stores SKD (FJ,FK)	SKD16	2.S	<input checked="" type="checkbox"/>
D796832	FJ	Remedios, Monica	Issued	Chain Store Stores SKD (FJ,FK)	SKD16	2	<input checked="" type="checkbox"/>
D796833	FJ	Kiefer, Steven	Issued	Chain Store Stores SKD (FJ,FK)	SKD16	2	<input checked="" type="checkbox"/>
D796834	FJ	Principato, Julieanne	Issued	Chain Store Stores SKD (FJ,FK)	SKD16	2	<input checked="" type="checkbox"/>
D796835	FJ	Smith, John	Issued	Chain Store Stores SKD (FJ,FK)	SKD16	2	<input checked="" type="checkbox"/>
D811656	FJ	Carter, Ryan	Issued	Chain Store Stores SKD (FJ,FK)	SKD16	2.C	<input checked="" type="checkbox"/>

## Reports – Printable Hierarchy by Location – Export to Excel

The Printable Hierarchy (By Location) report has been enhanced to allow for Excel export. By identifying the selection of information and clicking the Excel icon at the top of the screen, the information can be exported to Excel for additional data manipulation (sorting, filtering, modifying, etc.).

The most recent (un-manipulated) data can always be reviewed in SecurityRecords.com® by running the report and viewing the real-time data.

### Example:

The screenshot shows the SecurityRecords.com web interface. The 'Printable Hierarchy (by Location)' report is displayed for the 'Public Housing Agency' location, filtered by 'AMP 01 - Small Falls Village' and 'Robin Street'. The report lists 18 doors with their respective DHI codes and cylinder statuses. An Excel export dialog box is open, showing the file 'PrintableHierarchyByLocation.xls (1.25 KB)' and options to 'Open', 'Save', or 'Cancel'.

The screenshot shows an Excel spreadsheet with the following data:

lvlo	lvl	EntryPointName	DHI	qty	CylinderStatusName	
1	Robin Street	Robin Street	AMP 01: 1501 Robin Street	1AA	2	Installed
2	Robin Street	Robin Street	AMP 01: 1503 Robin Street	2AA	2	Installed
3	Robin Street	Robin Street	AMP 01: 1505 Robin Street	3AA	2	Installed
4	Robin Street	Robin Street	AMP 01: 1507 Robin Street	4AA	2	Installed
5	Robin Street	Robin Street	AMP 01: 1509 Robin Street	5AA	2	Installed
6	Robin Street	Robin Street	AMP 01: 1511 Robin Street	6AA	2	Installed
7	Robin Street	Robin Street	AMP 01: 1513 Robin Street	7AA	2	Installed
8	Robin Street	Robin Street	AMP 01: 1515 Robin Street	8AA	2	Installed
9	Robin Street	Robin Street	AMP 01: 1517 Robin Street	9AA	2	Installed
10	Robin Street	Robin Street	AMP 01: 1519 Robin Street	10AA	2	Installed
11	Robin Street	Robin Street	AMP 01: 1521 Robin Street	11AA	2	Installed
12	Robin Street	Robin Street	AMP 01: 1523 Robin Street	12AA	2	Installed
13	Robin Street	Robin Street	AMP 01: 1525 Robin Street	13AA	2	Installed
14	Robin Street	Robin Street	AMP 01: 1527 Robin Street	14AA	2	Installed
15	Robin Street	Robin Street	AMP 01: 1529 Robin Street	15AA	2	Installed
16	Robin Street	Robin Street	AMP 01: 1531 Robin Street	16AA	2	Installed
17	Robin Street	Robin Street	AMP 01: 1533 Robin Street	17AA	2	Installed
18	Robin Street	Robin Street	AMP 01: 1535 Robin Street	18AA	2	Installed