

HandyTrac Hawk

Key Control For Windows

USERS GUIDE



It's Easy!
I'll Help!



2/8/2001

INTRODUCTION

Welcome to HandyTrac Key Control for Windows. This software was designed using all of the standard windows controls to make using this program as simple as possible. It is an easy and reliable way to perform the following:

- * Tracks, controls, reports key usage by who, why, when and where
- * Supplies detailed activity status for non returned key sets
- * Access to keys immediately, via touch pad
- * Limits access to authorized persons
- * Generates management reports for audit and legal purposes
- * Password security for all menu options
- * Stores key usage history by employee and location

All of the key control information is easily entered and accessed at your computer, and downloaded to the Key Cabinet Touch Pad at the touch of a button. Your system has been delivered with software and data loaded.

This guide is divided into two sections. The Windows User's Guide will guide you through the activities performed in the Windows program on the computer. The Data Log Section will guide you through the activities performed on the Data Log at the Key Cabinet.

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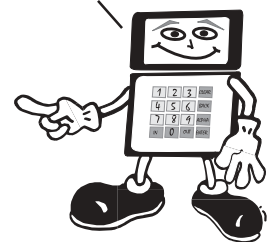
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Overview

Experienced Windows users will no doubt recognize many of the buttons and commands in this program. Those who are a little less experienced will pick it up with very little effort.

Navigation Buttons: These are used to move through a list quickly and easily. Click on First to go to the first record in a list. Last takes you to the last record. Next or Previous moves you forward or backward one record at a time.

Pointing your mouse arrow at any button will reveal a "Tool Tip" to describe what that button does.



Hot Keys: If you prefer to use the key board instead of the mouse, you can select buttons by holding the ALT key and pressing the underlined letter on the button label. Then press enter to "push" the button. For example: to press the Previous Button, hold ALT, press P, then press Enter.

Tab or mouse click to move through the fields and type in the appropriate information as needed.

IMPORTANT:

Any changes made on the computer WILL NOT be reflected at the Touch Pad until the End of Period function is performed. For example if you change a key tag you must do the End of Period function before the touch pad will recognize the new tag.

Log In

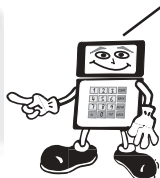
This program was installed on your C Drive. Click on the Start Menu, Go to the Program Files Folder, Go to the HandyTrac Folder, and Click the HandyTrac ICON to start the program. In a few seconds, the introductory, or "splash" screen will appear.



It will be replaced by the Log In screen. As prompted, enter the last 4 digits of your badge #, then enter your PIN# and hit {ENTER} or click OK.



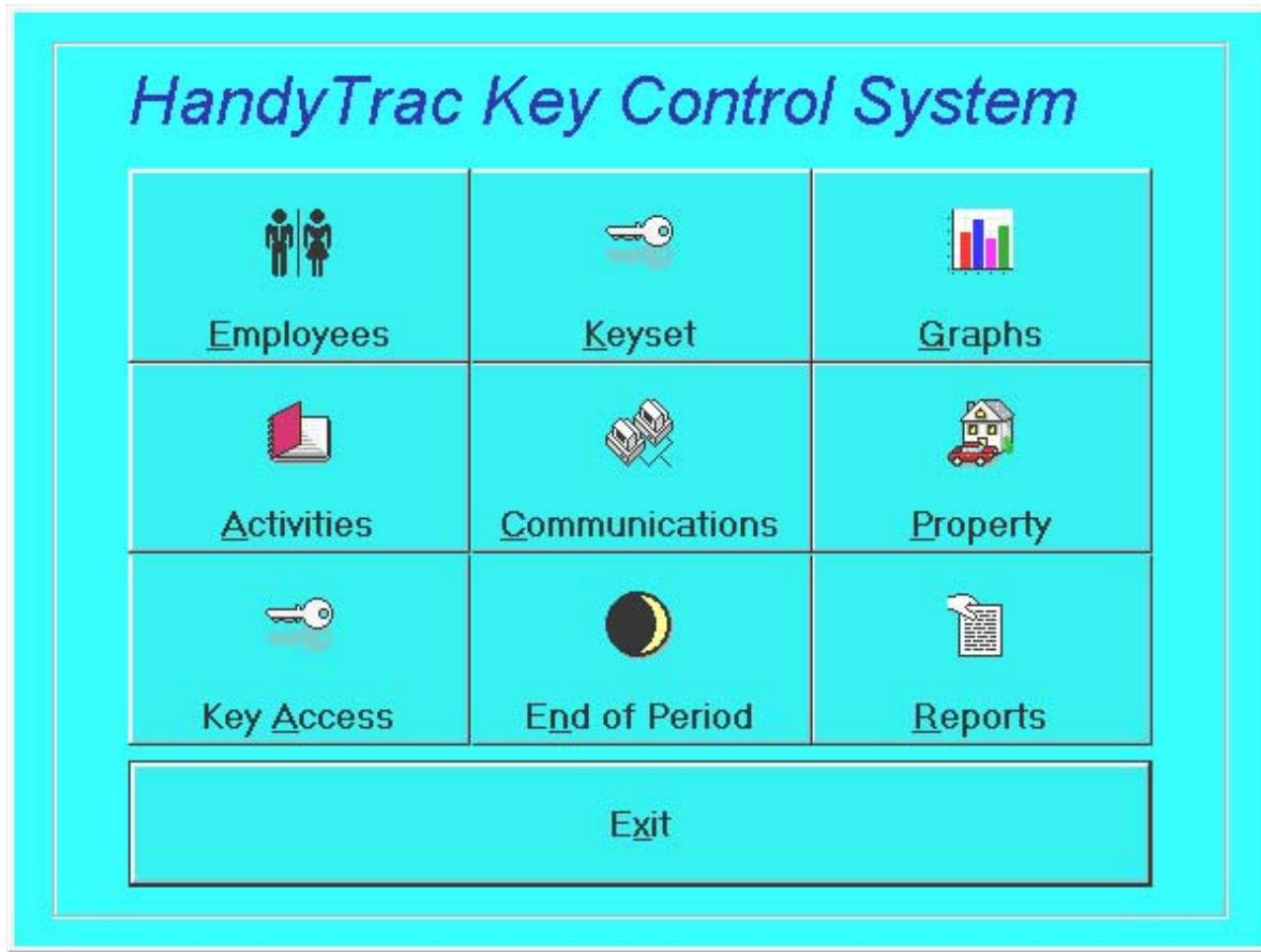
All badges start with 15, enter the last 4 digits!



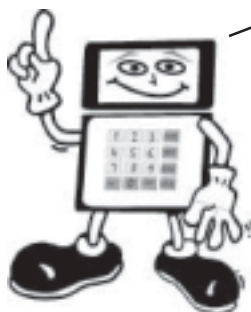
Main Menu

From the Main Menu screen, you can access all of the system functions. Simply click on the function you want, or use the Hot Key command to select the button and ENTER.

The remaining pages of this manual will guide you through each function, one at a time.



You can access everything in this system from this screen!





Employees

Review, add or change employee information on this screen. You can easily scroll through the employee list using the First, Previous, Next, or Last buttons, or find a specific employee by using the find function and selecting the employee's name. Tab or mouse click through the fields and type in the appropriate information. To add an employee click the ADD button to obtain a blank record.

First Name:	B	Find
Last Name:	Milhoan	
SSN:	111-11-4193	
Badge No:	154193	PIN: ****
Access:	Administrator	
Hire Date:	03/03/99	Active: ☒

First	Previous	Next	Last
Cancel	Add	Save	Close

SSN - Any combination of 9 digits will do, but they must be unique to that employee and there must be 9 digits.

BADGE - Enter the number on the employee badge.

PIN - Enter a unique 4 digit PIN # - Can't be sequential.

ACCESS - There are 3 levels of access listed on the pull down list. Select the right one based upon the following criteria.

- Administrator:** Can perform all functions.
- Supervisor:** Cannot access the property screen, print a key map, or change an employee's access level.
- User:** Can only use the Key Access screen to pull keys.
(To be used ONLY in the event of a Data Log

malfunction emergency.)

HIRE DATE - This field will automatically default to the date the new record was opened.

ACTIVE/INACTIVE - Click this box off to change an employee's status to Inactive when an employee is terminated or resigns. The inactive date will appear. This prevents that employee from accessing this program on the computer, and will also prevent access to the touch pad once the End of Period function is performed. *NOTE: You cannot delete employees... you can only make them inactive. This is so you can still go back and pull reports on the activities of former employees.*



Keyset

Review, add or change keys and tags on this screen. Scroll through the list using the First, Previous, Next, or Last buttons. The DELETE button will delete the tag displayed at the time. The ADD button will create a blank record. Enter the unit number and the tag number in the appropriate fields, and save your changes before proceeding.

To find a specific key tag, select the FIND button and select the unit number from the drop down list.

To replace a key tag, select the REPLACE TAG function, enter the old tag number on the left... the new tag number on the right, and click the REPLACE TAG button. Use this function when a tag is lost or damaged.



Graph

This function will produce a vertical bar graph of the 10 most used activities. Simply select the "from" and "to" date ranges. Select GRAPH IT to view the graph on the screen, or Print to print the graph. CLOSE takes you back to the Main Menu. *NOTE: The system defaults to the first day of the month as "From" and today's date as "To"*



To change the date ranges, click on the small arrow beside the date. The monthly calendar will appear. Simply click on the date you want. *NOTE: you can move forward or backward one month at a time by clicking on the small arrows on the upper right and left of the calendar... OR, you can click on the month at the top and select a month from the list, OR click on the year to reveal up and down arrows to move forward or back a full year at a time.*



The Graph function displays the 10 most often accessed functions, from left to right in order of use frequency. Click on the PRINT button to print the graph.

Activities

Activities #10 through #99 can be customized to suit the needs of your property. (#1 through #9 are locked system functions) The system comes with the most commonly used activities programmed in.

The image shows a window titled "HandyTrac Key Control System" for customizing activities. It has a blue border. Inside, there is a "No:" label and a dropdown menu showing "10*". To the right is a "Description:" label and a text box containing "Show Unit". Below these are four buttons: "First", "Previous", "Next", and "Last". At the bottom are two buttons: "Save" and "Close".

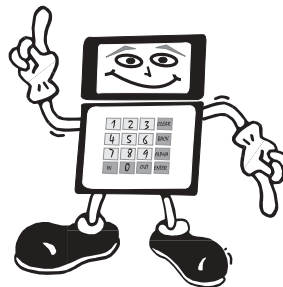
Click on the arrow beside the activity number to select the activity number you want to customize. Type the activity description in the description window. Save your changes. *NOTE: Activity numbers with an asterisk* beside them already have a description attached. You may change the existing description, or add on to an unused number. Only activities with a description and asterisk will appear on the Activities List Report. To print a "New Activities Sheet" once changes have been made, turn to the "Reporting Function" on page 13.*

Communications



The Communications function will rarely be used. This is where the settings for communicating between the Touch Pad and your computer are determined. It was set up correctly when your system was installed. Changing it will effect the way your system operates. We recommend against it!

It's not a good idea to change either of these screens!



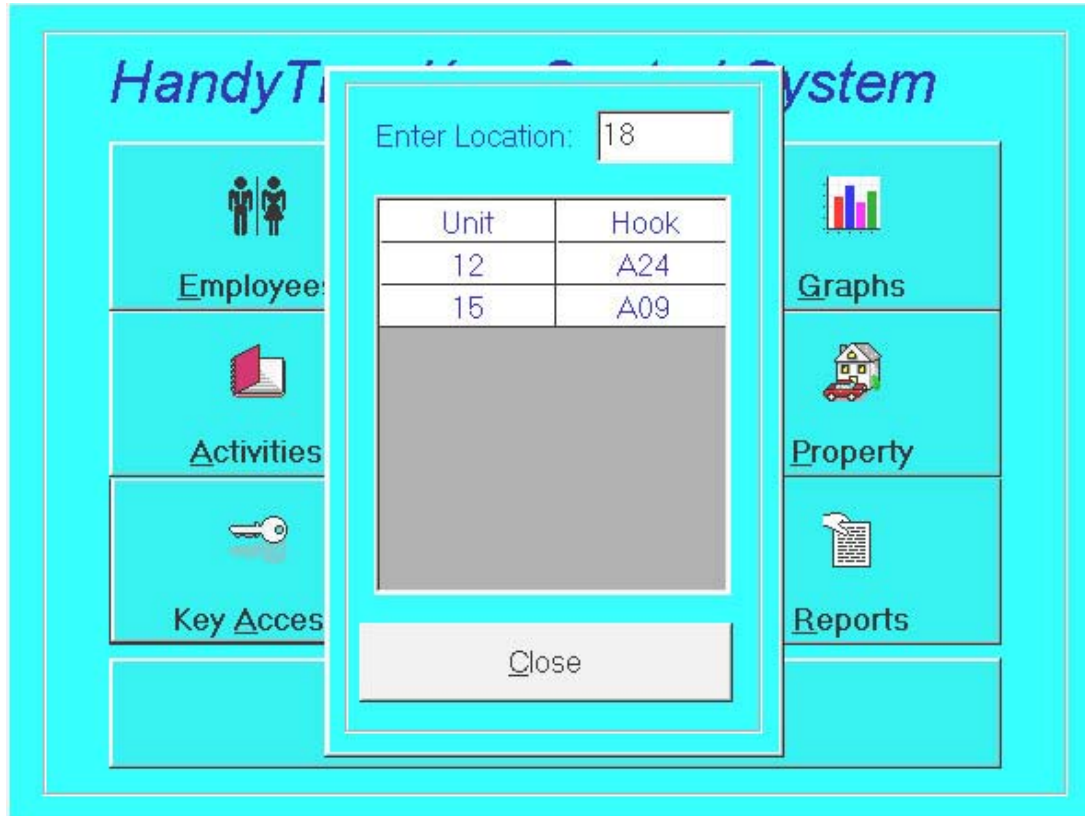
Property

The Property was also set up correctly when your system was installed. You will need to access it only if the name of your property is changed or to back up the system. We recommend that you back up the system daily. To back up the system insert disk and press "Backup Database".

Key Access

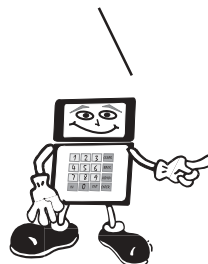
This screen is very rarely used. It is an emergency back up procedure in the event of a problem with the Data Log. It is a manual method for recording key use.

NOTE: All keys checked using this method will appear as an exception on the reports as a PC Key Pull.



Enter the unit number and press return. The screen will reveal the location of the key. Click OUT to return to the main menu.

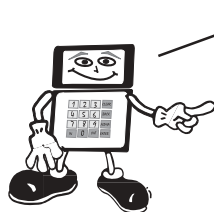
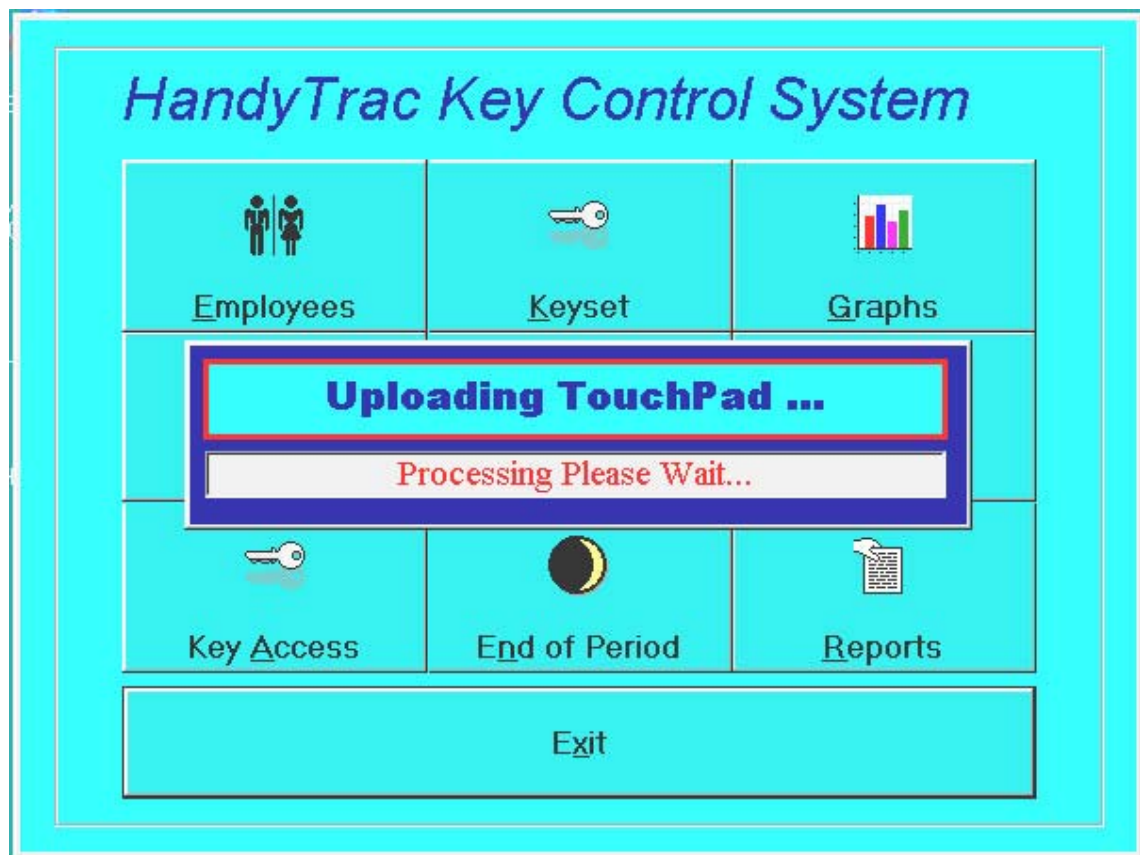
Remember to scan all your keys back in after the Data Log problem is resolved!





End of Period (EOP)

The End of Period (EOP) function performs several important tasks simultaneously. When you run the EOP, your computer communicates with the touch pad. It retrieves all of the activity information from the Data Log and updates the computer data base. It also sends updated system information such as employee status and key tag changes to the Data Log.



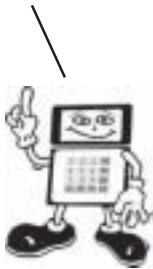
IMPORTANT: Changes made at the computer will not take effect at the Data Log until the EOP is run. For Example, assume an employee is terminated under suspicious circumstances and you want to immediately remove his/her access to keys. You must 1) use the employee screen to change the employees status to "Inactive" AND 2) run the EOP procedure to send that status change to the Data Log.



Reports

There are 9 different report types available. Some reports require the user to define criteria such as the date ranges and the specific information to be included. Some have already established criteria and will run simply by accessing the appropriate report button.

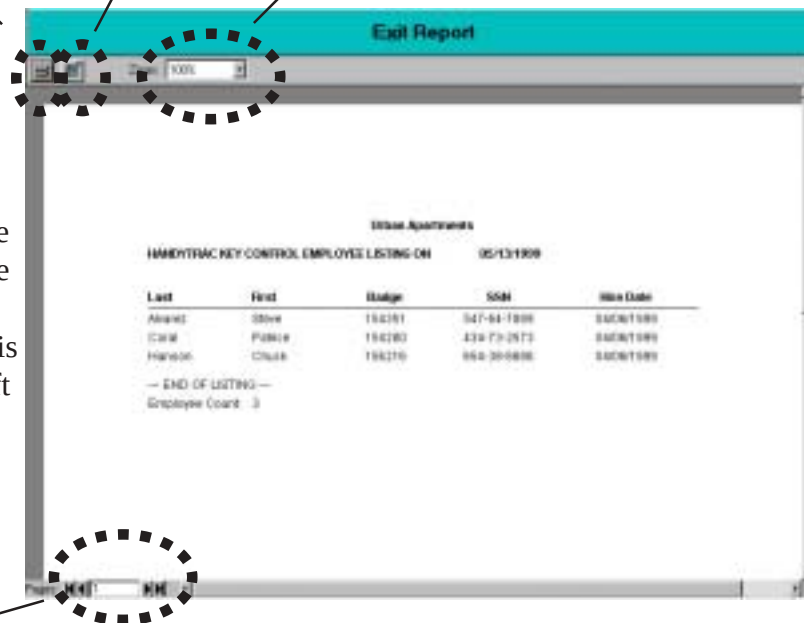
The check boxes on the Employee List and the Report By Employee lets you choose between active and inactive employees. Click it off to print inactive employee info.



Printing Reports

In all cases, the report will appear on the screen for previewing prior to printing. You can zoom in or out using the Zoom feature at the top of the screen, and scroll through multiple page reports using the page selector at the bottom of the screen. Once the report is run, click the print Icon in the upper left corner of the screen to print the report. The Export function is an advanced activity used to export the data in different formats to other programs.

Print Export Zoom



Page

Automatic Reports

Active Employees List

Activity Codes List

Exit Map

Keys Out Report

Exception

Transactions

Report by Unit

Report by Active Employee

Report by Activity

Done

Employee List

If you left the check box on, it prints a list of all currently active employees. If you clicked it off, it prints inactive employees.

Exit Report

Urban Apartments

HANDYTRAC KEY CONTROL EMPLOYEE LISTING ON 05/13/1999

Last	First	Badge	SSN	Hire Date
Alvarez	Steve	154251	547-56-7889	04/06/1988
Coral	Patricia	154280	434-75-2573	04/06/1988
Hansen	Chuck	156218	654-30-8888	04/06/1988

— END OF LISTING —
Employee Count: 3

Exit Report

Urban Apartments

HANDYTRAC KEY CONTROL ACTIVITY LISTING ON 05/13/1999

Return Key
Change Activity Code

No.	Description
02	LOCATE LOCK FOR KEY SET
03	LAST TRANSACTION
04	KEY ROTATION
06	REVIEW KEYS OUT
10	SHOW UNIT
11	SHOW UNIT
12	SHOW UNIT
13	SHOW UNIT
14	MANAGEMENT INSPECTION
15	OWNER INSPECTION
16	LENDER INSPECTION
17	SAFETY INSPECTION
18	RESIDENT LOCK OUT
19	MOVE IN

Activity List

Prints a list of all activity codes and their description. Post an activity list near the key cabinet for employee reference when pulling keys.

Automatic Reports

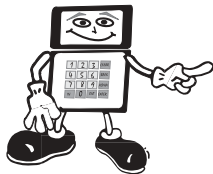
Automatic Reports menu options:

- Active Employees List
- Activity Codes List
- Key Map
- Exit Report
- Report by Active Employees
- Report by Activity

Key Map

Prints a list of all unit numbers, hook numbers and key tag numbers. This report is an important part of your emergency back up procedures. It must be kept up to date. Print this list every time you make changes to key tags or locations.

It is essential to the security of your system that the Key Map be kept in a secure location such as the safe!



Exit Report

Zone: 1001

KeyMap: Confidential
Keep in SAFE Or Other SECURE Place

Urban Apartments Write Replacement Tags As Needed

Unit Number	Hook	Tag	Tag	Tag	Tag	Tag	Tag
1	A15	6886					
1	A15	0027					
10	A10	0541					
10	A10	0080					
11	A08	6118					
11	A08	0057					
12	A24	6178					
12	A24	0887					
13	A02	6818					
13	A02	0082					
14	A19	0288					
14	A19	0038					
15	A09	6682					
15	A09	0047					

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Keys Out Report

Prints a list of all keys checked out of the system at the time the report is run.

Exit Report

Zone: 1001

Urban Apartments

HANDYTRAC KEY CONTROL REPORT ON 05/13/1999

THESE KEYS ARE OUT:

Employee	Unit	Activity	Date	Time
Alonso, Elmo	1	1	05/07/1999	11:07:58
Alonso, Elmo	19	1	05/07/1999	11:08:25
Casal, Patricia	22	1	05/07/1999	16:25:48
Alonso, Elmo	8	1	05/07/1999	11:08:38

— END OF REPORT —
Record Count: 4

Page: 1/1

Criteria Sensitive Reports

These reports require the user to determine the information to be included in the report. When accessing one of these reports, a dialog box will appear. Set the criteria before running the report.

Exception Report

Prints a list of errors and procedural violations within the date ranges defined in the dialog box.

Employee	Unit	Activity	Description	Exception	Date	Time
Hansen, Chuck	04	01		E	04/05/1999	1:00:12 PM
Hansen, Chuck	04	01		E	04/05/1999	1:00:25 PM
Hansen, Chuck	7	01	Return Key	W	04/05/1999	1:00:33 PM
Hansen, Chuck	10	01	Return Key		04/05/1999	1:00:45 PM
Hansen, Chuck	4	01	Return Key		04/05/1999	1:00:50 PM
Hansen, Chuck	1	01	Return Key		04/05/1999	1:00:54 PM
Hansen, Chuck	7	01	Return Key	W	04/05/1999	1:17:40 PM
Hansen, Chuck	7	01	Return Key	W	04/05/1999	1:17:40 PM
Hansen, Chuck	3	01	Return Key	W	04/05/1999	1:17:40 PM
Hansen, Chuck	1	01	Return Key		04/05/1999	1:17:47 PM
Hansen, Chuck	3	01	Return Key		04/05/1999	1:17:47 PM
Hansen, Chuck	3	01	Return Key		04/05/1999	1:17:47 PM
Hansen, Chuck	10	01	Return Key		04/05/1999	1:17:50 PM
Hansen, Chuck	10	01	Return Key		04/05/1999	1:17:50 PM
Hansen, Chuck	10	01	Return Key		04/05/1999	1:17:50 PM

Transaction Report

Prints a list of all transactions within the date ranges defined in the dialog box.

Employee	Unit	Activity	Description	Exception	Date	Time
Hansen, Chuck	04	01	RETURN KEY	W	04/05/1999	0:47:39 AM
Hansen, Chuck	8	01	Return Key		04/07/1999	0:57:18 AM
Hansen, Chuck	12	01	Return Key		04/07/1999	0:57:18 AM
Hansen, Chuck	10	01	Return Key		04/07/1999	0:57:14 AM
Hansen, Chuck	4	01	Return Key		04/07/1999	0:57:11 AM
Hansen, Chuck	11	01	Return Key		04/07/1999	0:57:39 AM
Hansen, Chuck	10	01	Return Key	W	04/07/1999	0:57:39 AM
Hansen, Chuck	8	10	RETURN UNIT: Sue		04/07/1999	0:58:48 AM
Hansen, Chuck	10	10	RETURN UNIT: Sue		04/07/1999	0:58:59 AM
Hansen, Chuck	10	10	RETURN UNIT: Sue		04/07/1999	0:58:13 AM
Hansen, Chuck	11	10	RETURN UNIT: Sue		04/07/1999	0:58:59 AM
Hansen, Chuck	12	10	RETURN UNIT: Sue		04/07/1999	0:58:22 AM
Hansen, Chuck	4	10	RETURN UNIT: Sue	W	04/07/1999	0:58:25 AM
Hansen, Chuck	11	01	Return Key	T	04/07/1999	0:58:34 AM

The screenshot displays the 'Active Employees List' report. The report title is 'Active Employees List'. The report is generated by the 'HRMS' system. The report shows a table with columns for Employee ID, Name, Department, and Status. The 'Status' column is highlighted in red. The report includes a 'Print' button. The report is generated by the 'HRMS' system.

Set the date ranges at the top. Select the Units to be included by clicking in the check boxes beside the desired units. When all the desired units are checked, click the Move button to move them to the list on the right. Remove units from the list by reversing the process and clicking the Remove button. Click OK to run the report.

Exit Report						
Missed Appointments						
EMERGENCY KEY CONTROL REPORT BY UNIT OR				DOOR ID#		
Date Range: All Dates						
Employee	Unit	Activity	Description	Exception	Date	Time
Hansen, Chad	10	01	Return Key		04/09/1000	4:11:30 PM
Hansen, Chad	10	01	Return Key	M	04/07/1000	8:50:53 AM
Hansen, Chad	11	01	Return Key		04/09/1000	4:18:41 PM
Hansen, Chad	11	01	Return Key		04/07/1000	8:21:08 AM
Hansen, Chad	11	01	Return Key	T	04/07/1000	8:22:08 AM
Hansen, Chad	11	00	3-DOOR LOST - Sub		04/07/1000	8:20:58 AM
Hansen, Chad	11	01	Return Key		04/07/1000	8:31:08 AM
Hansen, Chad	12	01	Return Key		04/09/1000	4:11:21 PM
Hansen, Chad	12	01	Return Key		04/07/1000	8:00:48 AM
Hansen, Chad	12	00	3-DOOR LOST - Sub		04/07/1000	8:35:22 AM
Hansen, Chad	12	01	Return Key		04/07/1000	8:21:18 AM
Hansen, Chad	13	01	Return Key	M	04/09/1000	4:10:20 PM
Hansen, Chad	13	01	Return Key		04/09/1000	4:12:47 PM

Set the date ranges at the top. Select the employees to be included by clicking in the check boxes beside the desired employees. When all the desired Employees are selected, click the Move button to move them to the list on the right. Remove Employees from the list by reversing the process and clicking the REMOVE button. Click OK to run the report.

Exit Report



Date:

11:46:46 AM 10/10/2010

11:46:46 AM 10/10/2010

EMPLOYEE KEY CONTROL REPORT BY EMPLOYEE ID

10/10/2010

Date Range: All Dates

Employee	Unit	Activity	Description	Exception	Date	Time
Harrison, Chuck	00			E	10/05/00	1:00:52 PM
Harrison, Chuck		00		E	10/05/00	1:00:53 PM
Harrison, Chuck	7	01	Return Key	08	10/05/00	1:00:51 PM
Harrison, Chuck	10	01	Return Key		10/05/00	1:00:45 PM
Harrison, Chuck	8	01	Return Key		10/05/00	1:00:58 PM
Harrison, Chuck	3	01	Return Key		10/05/00	1:00:54 PM
Harrison, Chuck	7	01	Return Key	08	10/05/00	1:17:45 PM
Harrison, Chuck	7	01	Return Key	08	10/05/00	1:17:45 PM
Harrison, Chuck	7	01	Return Key	08	10/05/00	1:17:45 PM
Harrison, Chuck	3	01	Return Key		10/05/00	1:17:47 PM
Harrison, Chuck	3	01	Return Key		10/05/00	1:17:57 PM
Harrison, Chuck	7	01	Return Key		10/05/00	1:17:57 PM
Harrison, Chuck	10	01	Return Key		10/05/00	1:17:50 PM
Harrison, Chuck	10	01	Return Key		10/05/00	1:17:55 PM
Harrison, Chuck	10	01	Return Key		10/05/00	1:17:50 PM

The screenshot shows the 'New Report' dialog box in SAP. The left pane contains a tree view with the following items:

- # Active Employees List
- Activity Coded List
- Etc Map
- Key Out Report

The right pane displays a preview of the selected report, showing a table with two columns: 'Exception' and 'Transactions'. Below the table are three rows of data:

Exception	Transactions
Report by Unit	
# Report By Active Employee	
Report by Activity	

At the bottom of the dialog, there is a 'Done' button.

Set the date ranges at the top. Select the Activities to be included by clicking in the check boxes beside the desired activities. When all the desired Activities are selected, click the Move button to move them to the list on the right. Remove Activities from the list by reversing the process and clicking the Remove button. Click OK to run the report.

☐ Select All Dates

From: 04/01/1999 To: 04/20/1999

☐ 10 - SHOW UNIT- Suc
☐ 11 - SHOW UNIT- Par
☐ 12 - SHOW UNIT- Bll
☐ 13 - SHOW UNIT
☒ 14 - MANAGEMENT II
☐ 15 - OWNER INSPEC
☐ 16 - LENDER INSPEC
☐ 17 - SAFETY INSPEC
☐ 18 - RESIDENT LOCK

Move >

Move All >>

< Remove

<< Remove All

☐ 01 - Return Key
☐ 02 - LOCATE HOOK FO
☐ 03 - LAST TRANSACTIO
☐ 04 - KEY ROTATION
☐ 06 - REVIEW KEYS OU

OK Cancel

Exception Codes

Code: Meaning:

- Employees who frequently make errors or fail to follow procedures should be counseled and trained on proper system procedures.***

Troubleshooting

1) During EOP Procedure - "Unable to connect to touch pad" Error message

Solution- Check the red communications cable connections at the back of your computer and at the touch pad. Make sure all other Window's applications are shut down and the tool bar is clear.

2) Some of the main menu function buttons are gray and won't work.

Solution - These buttons are disabled based upon the access status of the user. Check with your system administrator.

3) Activity Codes not on the active list appear on the reports

Solution - User error. The user selected an inactive code, remind them to be more careful.

4) "Not enough data to Graph" Error message

Solution - Check the date ranges to make sure they are set correctly.

5) "You must pick the (Units/employees/activities) you want included in the report" Error message.

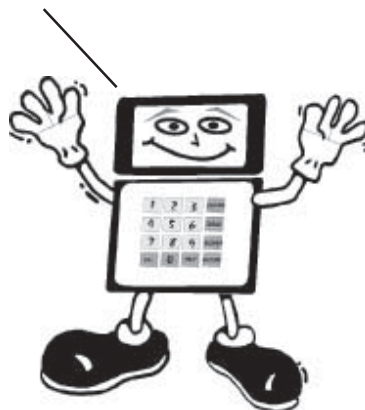
Solution - After Selecting the report criteria click MOVE to add them to the report list.

6. How do I get technical support?

There is no charge for up to 5 hours of telephone tech support while your system is still under warranty (1 year), and extended warranties are available. After your warranty has expired, there will be a charge for tech support.

Call HandyTrac for more information: **1-888-458-9994** (toll free)

Don't Worry... Be Happy!
I've got all the answers



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ACTIVITY CODES

IN	Return Key Set	25	Maintenance Punch Out
CLEAR	Change Activity Code	30	Pest Control
02	Locate Hook for Key Set	31	Pest Control
03	Last Transaction	35	Utilities: Gas
06	Audit Keys Out	36	Utilities: Electric
10	Show Unit	40	Media/Cable
11	Show Unit	50	Work Order
12	Show Unit	51	Work Order: HVAC
13	Show Unit	52	Work Order: Plumbing
14	Management Inspection	53	Work Order: Appliance
15	Owner Inspection	54	Work Order: Electrical
16	Lender Inspection	55	Work Order: Carpentry
17	Safety Inspection	56	Work Order: Interior
18	Resident Lock Out	57	Work Order: Paint
19	Resident Move In	60	Security Check
20	Unit Lock Change	61	Utilities: Gas/Elec.
21	Turnkey	89	Preventative Maintenance
22	Paint Unit	90	Employee In
23	Clean Unit	91	Employee Out
24	Carpet Unit	99	Exception

Using the Key Control for Windows program, Activity Codes 10 – 98 may be customized, and unassigned codes may be assigned by user.

Don't worry... I've already programmed these in!

