# KEYper electronic key management system

## KEYper GO Web & Mobile guide

Key management simplified

## Introduction

This user guide has been prepared to assist with the administration of KEYper electronic systems connected to the internet or local area network that can be managed from a web browser-based or mobile application. Therefore, it explains features available to administrators only. It assumes you have sufficient knowledge with regards to using and managing KEYper systems and carrying out such activities as logging in by using a variety of different methods such as PIN, fingerprint scan, proximity (prox) card, and fob as well as removing (checking out) and returning (checking in) keys.

This guide is also intended as a complement to the in-depth product training you will have received from one of our experienced technicians after your KEYper cabinets and KEYper GO/KEYper GO Web have been installed and commissioned. We understand that you will not remember everything from your product training, so please keep this guide handy for those times when you need to remember how to import keys to your system, set up an access group, or create an asset reservation.

## KEYper GO vs. KEYper GO Web

KEYper provides a secure, cloud-based application for SaaS subscribers, designed to simplify and enhance asset management. The application is available in two formats: KEYper GO (mobile) and KEYper GO Web (desktop). Both versions integrate seamlessly with the KEYper key management system, enabling users to manage assets, inventory, reservations, and user permissions directly from their smartphone or computer. With streamlined workflows and robust functionality, KEYper GO and KEYper GO Web offer features such as transaction history, user and permission management, asset reservations, transfers, and more.

This guide explains how to use KEYper GO and KEYper GO Web. Features available within KEYper GO only are notated with the icon, and features available within KEYper GO Web are notated with the icon.

***Notes:***

- *Occasionally, this guide will reference features available only within the classic (on-prem) KEYper Web Administration Application, also known as the Web Admin. These features will be notated with the icon.*
- *This guide will also reference features for admins only. These features will be notated with the icon.*

## Terms to know

KEYper uses a number of proprietary terms to refer to components of our hardware and software. Their meanings are as follows:

1. **Fob**
   The fob is at the heart of any KEYper key management system. Depending on the type of panel in your electronic system, it twists or locks into the socket on the panel. It contains a microchip with a unique identification number allowing the KEYper system to identify the key(s) attached. The types of fobs are as follows:
   - **Sturdifob**: The Sturdifob attaches to keys and twists into non-lock-in panels.
   - **iFob**: The iFob attaches to keys and locks into lock-in panels.
   - **Dealer Plate iFob**: The Dealer Plate iFob attaches to dealer plates and locks into lock-in dealer plate panels.
2. **Smart Tag**
   The Smart Tag is a reusable label that correlates to the fob serial number once configured using fob labeling. KEYper electronic systems feature random return for added security, meaning any asset may be returned to any open socket position in the appropriate panel to avoid any user memorizing asset positions. The Smart Tag attaches to the fob with a split ring and is intended to remain with the fob once assigned to it.
3. **Tamper seal**
   The tamper seal is used to attach the key to the Sturdifob. Once the seal is locked, the only way to detach the key from the fob is to cut the tamper seal using a cutter tool.
4. **Cable seal**
   The cable seal is used to attach the key to the iFob. Once the seal is locked, the only way to detach the key from the fob is to cut the cable seal using a cutter tool.

*Fig. 1 – Sturdifob and key bunch example*

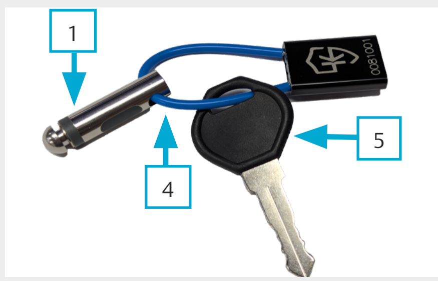

*Fig. 2 – iFob and key bunch example*

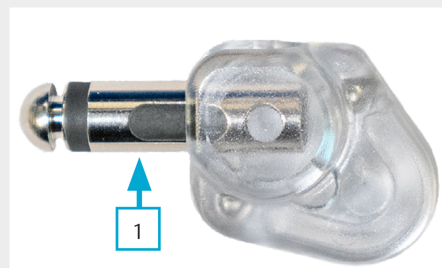

*Fig. 3 – Dealer Plate iFob example*

5. **Asset**
   An asset is an item that you want to keep track of within the cabinet by attaching it to the fob that is tracked by our software. The term "asset" is frequently used interchangeably with "key," but can also be used to refer to dealer plates, cards and card holders, etc.
6. **Panel**
   Panels are components inside the cabinet that contain positions, also called sockets, for holding assets. There are several types of panels, each designed for specific uses. Non-lock-in panels, shown in ***Fig. 4***, secure Sturdifobs by allowing them to twist into the socket. Lock-in panels, as shown in ***Fig. 5***, secure iFobs by locking them into place, and lock-in dealer plate panels, shown in ***Fig. 6***, are designed specifically to secure Dealer Plate iFobs using a similar locking mechanism. The non-lock-in panel, lock-in panel, and lock-in dealer plate panel all feature LED lights that guide users to the correct asset within the cabinet, making transactions more efficient. Depending on the model, a cabinet may include only one type of panel or a combination of different panel types to support various asset management needs.


*Fig. 4 – Non-lock-in panel*

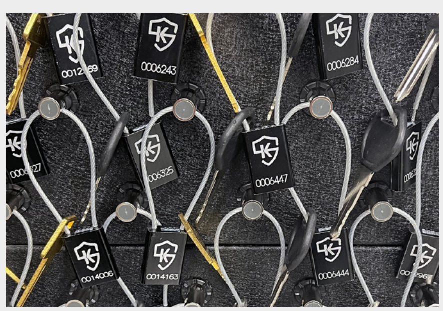
*Fig. 5 – Lock-in panel*


*Fig. 6 – Lock-in dealer plate panel*

7. **Kiosk cabinet**
The kiosk cabinet is the main cabinet within the system that has the touchscreen computer in it. It is the "brain" of the system. It is where all transactions at the cabinet take place for single cabinet systems and systems with add-on cabinets.

8. **Fob reader**
The fob reader is used to scan fobs and plays a role in the process of adding, identifying, and deleting assets in KEYper electronic systems. There are two types of fob readers for the different types of fobs: a Sturdifob reader and an iFob reader. A desktop version of the fob reader is included with your purchase of an electronic system.

   ***Note:*** *An additional fob reader can be purchased separately and installed on your kiosk cabinet.*

9. **Biometric reader**
The biometric (finger) reader allows you to log in by scanning your fingerprint.

10. **Proximity (prox) card reader**
The proximity (prox) card reader allows you to log in by scanning your proximity (prox) card.

   ***Note:*** *A proximity card reader can be purchased separately and installed on your kiosk cabinet.*

11. **Pod**
The pod is attached to the kiosk cabinet and houses the touchscreen computer, biometric and prox card readers, and the other electronics that drive the KEYper cabinet(s).

   ***Note:*** *The pod is available for HS systems only.*

12. **Add-on cabinet**
An add-on cabinet is a cabinet within the system without a touchscreen computer. Its transactions are controlled by the system's kiosk cabinet. You may have up to seven add-on cabinets networked with and run by a single kiosk cabinet.

13. **System**
A system consists of all cabinets networked together at an individual location, as well as the software that runs and allows the administration of the cabinets. A single system can consist of a single kiosk cabinet or up to eight cabinets total (one kiosk cabinet and up to seven add-on cabinets).

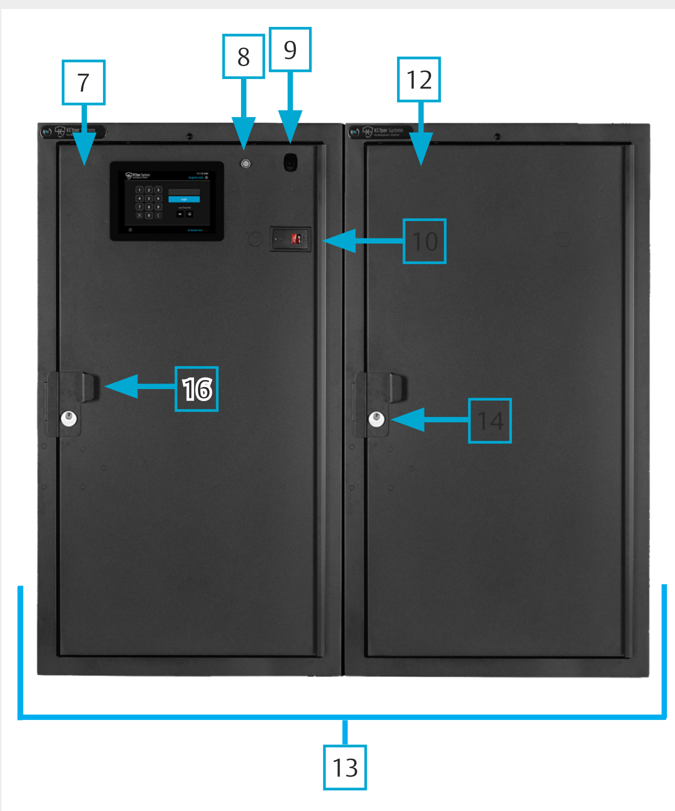


*Fig. 7 – MX system with one kiosk cabinet and one add-on cabinet*

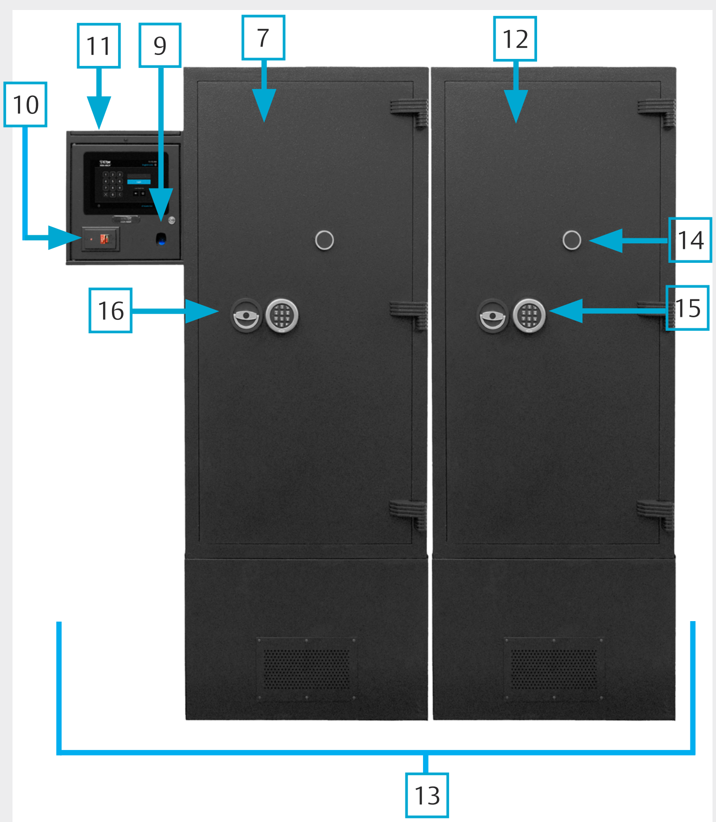


*Fig. 8 – HS system with one kiosk cabinet and one add-on cabinet*

14. **Hard override cylinder/lock**
The hard override cabinet keys you received with your electronic system may be used on the override cylinder (MX, MXi, MI, MD, and DP), shown in ***Fig. 9***, or override lock (HS), shown in ***Fig. 10***, to unlock your cabinet in the event of a power outage or if you wish to unlock the cabinet without logging in.

*Fig. 9 – Override cylinder on MX cabinet*

*Fig. 10 – Override lock on HS cabinet*

15. **Night lock**
The night lock is unlocked by an admin at the beginning of each business day. It remains unlocked for the duration of business and is locked at the end of the night when the business is closed. Depending on your region, your HS cabinet will come with a different type of night lock: a keypad night lock (EU/UK), also known as a keypad lock, or a keyed night lock (US). The keypad night lock is shown in ***Fig. 11*** and the keyed night lock is shown in ***Fig. 12***.

***Note:*** *The night lock is available on HS systems only.*

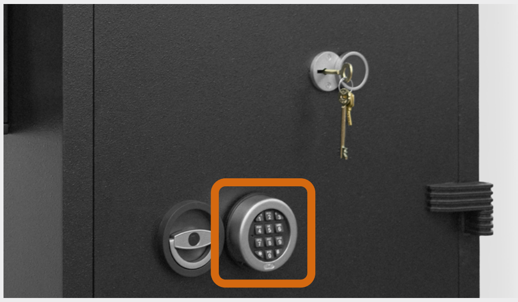

*Fig. 11 – Keypad night lock (HS EU/UK)*

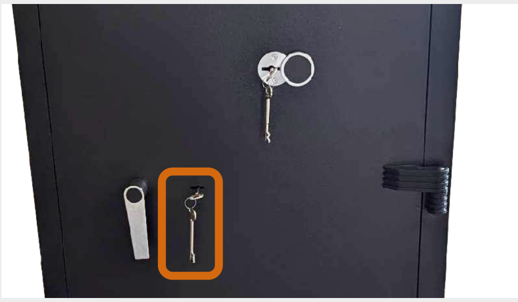

*Fig. 12 – Keyed night lock (HS US)*

16. **Handle/day lock**
The system unlocks the handle when you log in at the kiosk and initiate a transaction. All of the electronic systems except the HS have the handle shown in ***Fig. 13***. The HS has a handle that is also known as a day lock. Depending on your region, your HS cabinet will come with a different type of day lock: a ring handle (EU/UK), as shown in ***Fig. 14*** or an L-shaped handle, as shown in ***Fig. 15***. Despite the difference in appearance, the day locks work similarly. Turn the day lock clockwise to open the cabinet once unlocked. Turn the day lock counter-clockwise to lock the cabinet when you are finished with your transaction.

***Note:*** *The day lock is available on HS systems only.*

*Fig. 13 – Handle*

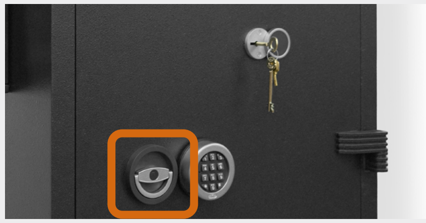

*Fig. 14 – Ring handle day lock (HS EU/UK)*

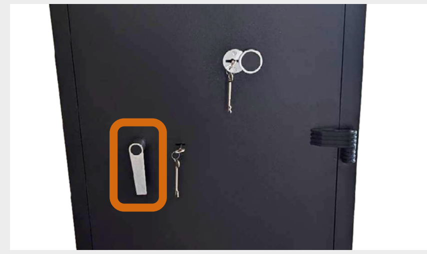

*Fig. 15 – L-shaped handle day lock (HS US)*

## Quick start

To get quickly started using KEYper GO and KEYper GO Web to set up users, register assets, and create access groups, see the following sections:

- **Add user**
- **Add assets**
- **Add access group**

***Note:*** *The layout of the screens in your instance of KEYper GO/KEYper GO Web may differ slightly from what is shown in this guide depending on the configuration of your system. If you have any questions about your specific setup, contact Support.*

## Connect to KEYper GO and KEYper GO Web

The following sections will show you how to connect to KEYper GO and KEYper GO Web as a new user.

***Note:*** *When setting up a new system, you must first log in to the Web Admin with the default admin credentials and set up an admin account that can be used to log in to KEYper GO or KEYper GO Web. Once you have created an admin account, proceed with the following steps. For more information on the Web Admin, see the* ***Electronic System Manual****.*

### 1. Connect to KEYper GO

You can access KEYper GO from a smartphone or tablet. To connect to KEYper GO, do the following:

1. Install KEYper GO from your device's app store.
   - KEYper GO is available for iOS and Android.

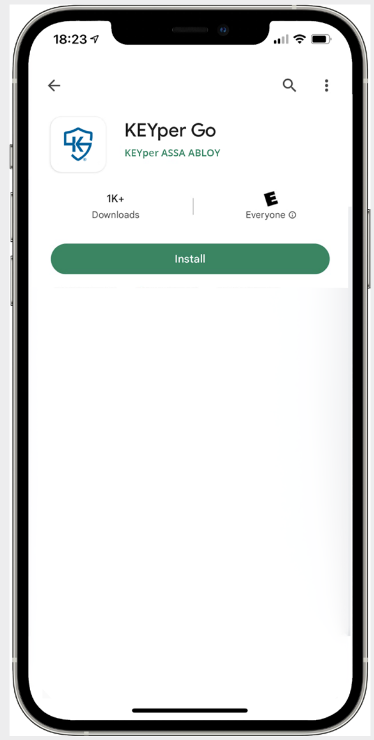


*Fig. 16 – Install KEYper GO*

2. Launch KEYper GO.
   - The first time you launch the app, you are prompted to register by scanning the mobile registration code provided to you. You can find the mobile registration code in the kiosk application and the Web Admin.
   - In the kiosk application, the mobile registration code is located on the **System Info** screen, shown in *Fig. 17*. For information on navigating to this screen, see the **Electronic System Manual**.

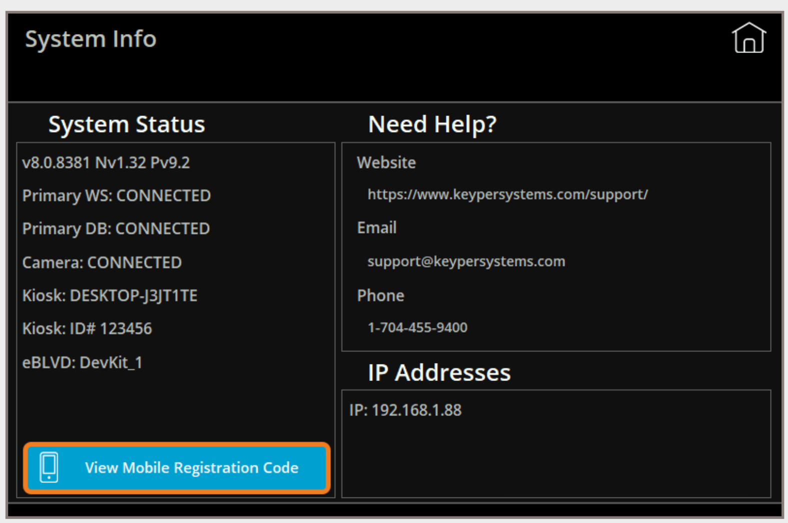


*Fig. 17 – Kiosk application with mobile registration code indicated*

- In the Web Admin, the mobile registration code is located on the **Login** screen, shown in *Fig. 18*. For information on accessing the Web Admin, see the Electronic System Manual.

3. Once you have located the mobile registration code, tap **Scan Mobile Registration Code** in KEYper GO and scan the mobile registration code.

- When you scan the mobile registration code, a pop-up appears indicating that registration was successful.

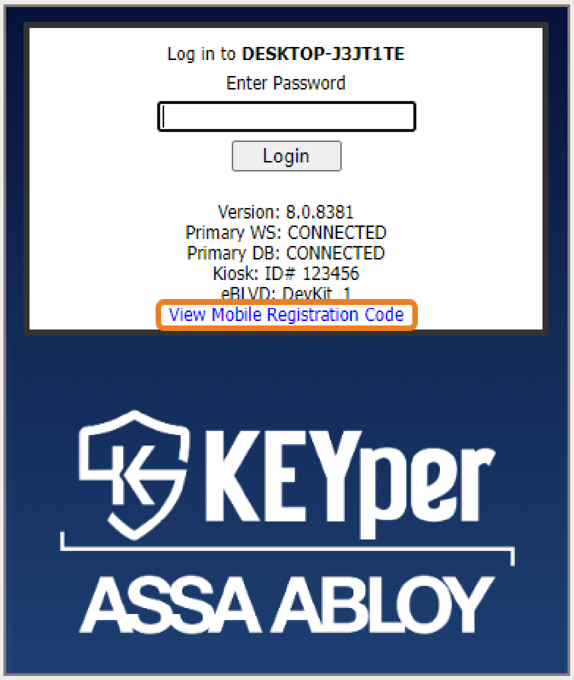

*Fig. 18 – Web Admin with mobile registration code indicated*

4. On the **Login** screen, shown in *Fig. 19*, do the following depending on the status of your system:

- If you are a new SaaS customer using KEYper GO or KEYper GO Web for the first time, log in with the admin email and password that were created in the Web Admin. For details on creating users and configuring account credentials in the Web Admin, refer to the Electronic System Manual.
- If an admin has already completed the initial system setup and added you as a user or admin in KEYper GO or KEYper GO Web, log in using the email and password they set for you.

5. Tap **Login**.

6. The first time you log in, you must acknowledge a number of legal documents to proceed.

- Swipe through the pages to read the agreements.
- The documents include the following:
  - SaaS Terms of Service
  - End User License Agreement
  - Product Privacy Notice

*Fig. 19 – Login screen*

## 2. Connect to KEYper GO Web

You can open KEYper GO Web in a web browser, such as Internet Explorer, Microsoft Edge, Google Chrome, etc. To connect to KEYper GO Web, do the following:

1. Launch a browser window on your computer, tablet, or mobile device.
2. Enter the unique URL provided to you by KEYper, generally **keypergo.com/CustomerName**.
3. On the **Login** screen, shown in ***Fig. 20***, do the following depending on the status of your system:
   - If you are a new SaaS customer using KEYper GO or KEYper GO Web for the first time, log in with the admin username (email) and password that were created in the Web Admin. For details on creating users and configuring account credentials in the Web Admin, refer to the **Electronic System Manual**.
   - If an admin has already completed the initial system setup and added you as a user or admin in KEYper GO/KEYper GO Web, log in using the username (email) and password set for you.
4. Click **Login**.

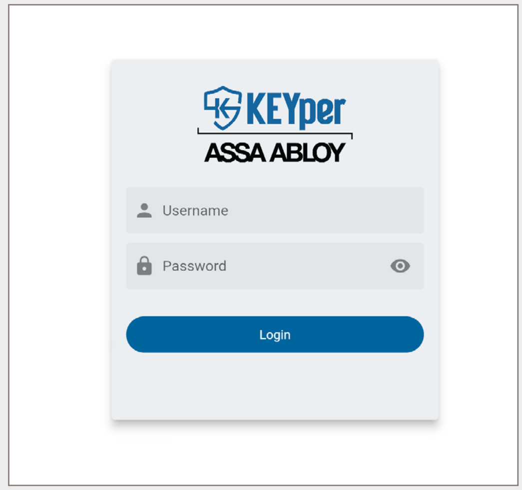


*Fig. 20 – Login screen*

5. The first time you log in, you must acknowledge a number of legal documents to proceed, as shown in ***Fig. 21***.
   - Use the navigation buttons to zoom in/out and scroll through the pages to read the agreements.
   - The documents include the following:
     - SaaS Terms of Service
     - End User License Agreement
     - Product Privacy Notice

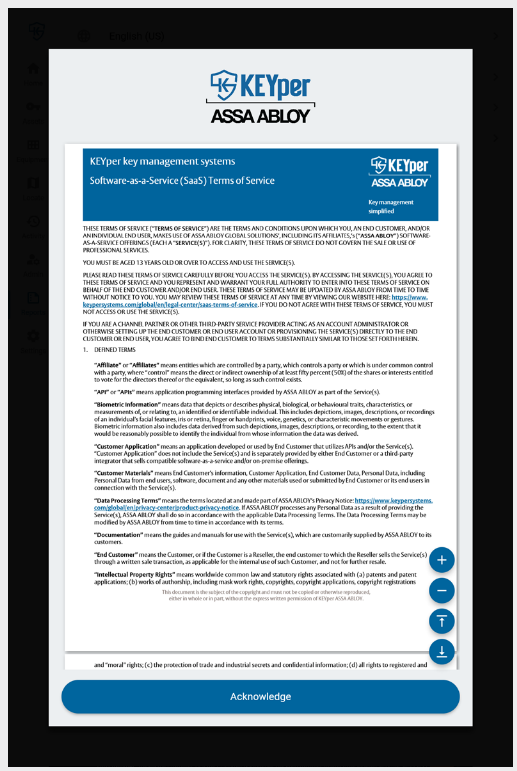


*Fig. 21 – Acknowledge the agreements to proceed*

## Biometric authentication

KEYper GO supports biometric authentication so that you may quickly log in to the app via facial recognition or fingerprint. The following sections will show you how to use biometric authentication.

### 1. Enable biometric authentication

To enable biometric authentication, do the following:

1. On the KEYper GO **Login** screen, type your username (email) and password into the appropriate fields.
2. Tap **Biometric Authentication**, shown in ***Fig. 22***.


*Fig. 22 – Login screen with Biometric Authentication button indicated*

3. On the window that appears, tap **Yes**, shown in ***Fig. 23***, to enable biometric authentication after you log in.

4. Tap **Login**.

   - Your facial scan or fingerprint will be registered with KEYper GO.

   - At next login, tap the **Biometric Authentication** button, shown in ***Fig. 22***, to log in with facial recognition or fingerprint.

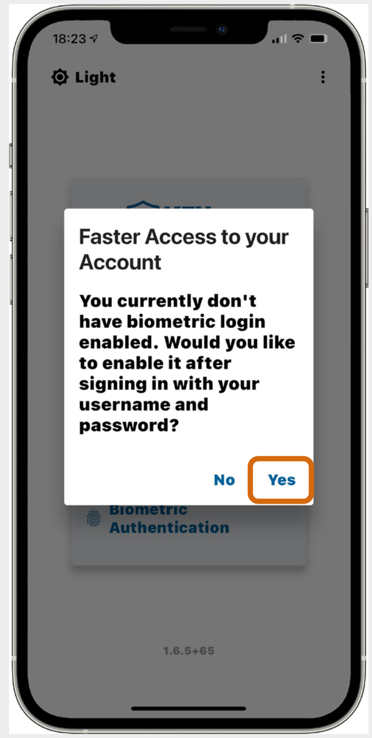


*Fig. 23 – Biometric authentication window with Yes button indicated*

## 2. Disable biometric authentication

To disable biometric authentication, do the following:

1. In KEYper GO, select **Profile** , shown in ***Fig. 24***, and select your name from the menu that appears.

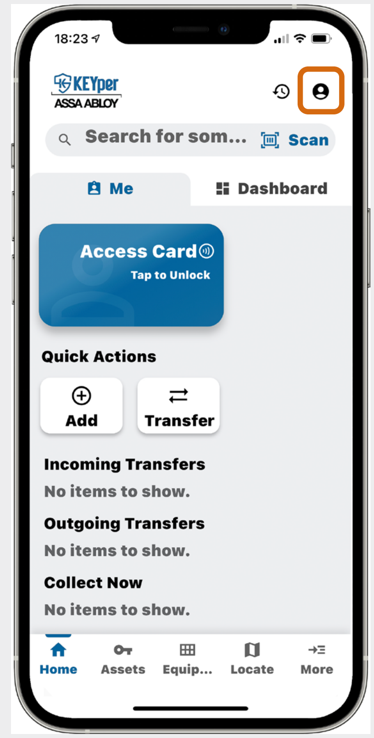


*Fig. 24 – Home screen with Profile button indicated*

2. On the **Profile** screen, navigate to the **Sign In Preferences** section and toggle the **Biometric Login** option off, as shown in ***Fig. 25***.
3. Select the **back arrow** to exit the **Profile** screen with your changes saved.

If you wish to enable biometric authentication again, follow the steps in **Enable biometric authentication**.

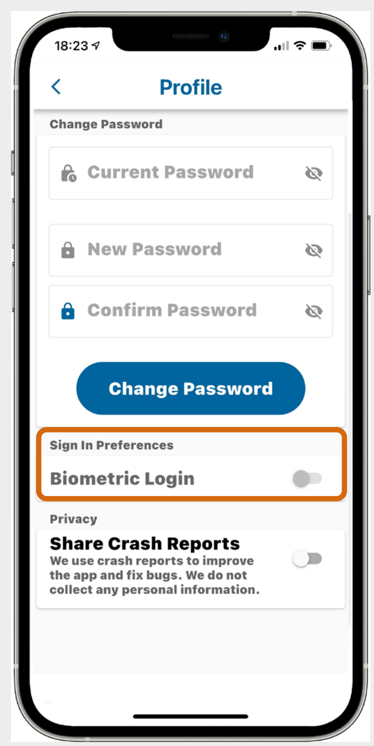


*Fig. 25 – Profile screen with Biometric Login toggled off*

## SAML support

KEYper GO and KEYper GO Web support SAML authentication for secure single sign-on. If you are interested in enabling this feature, contact Support for assistance. Once SAML is enabled, you will see the **SAML Login** button, shown in ***Fig. 26***, on the **Login** screen.

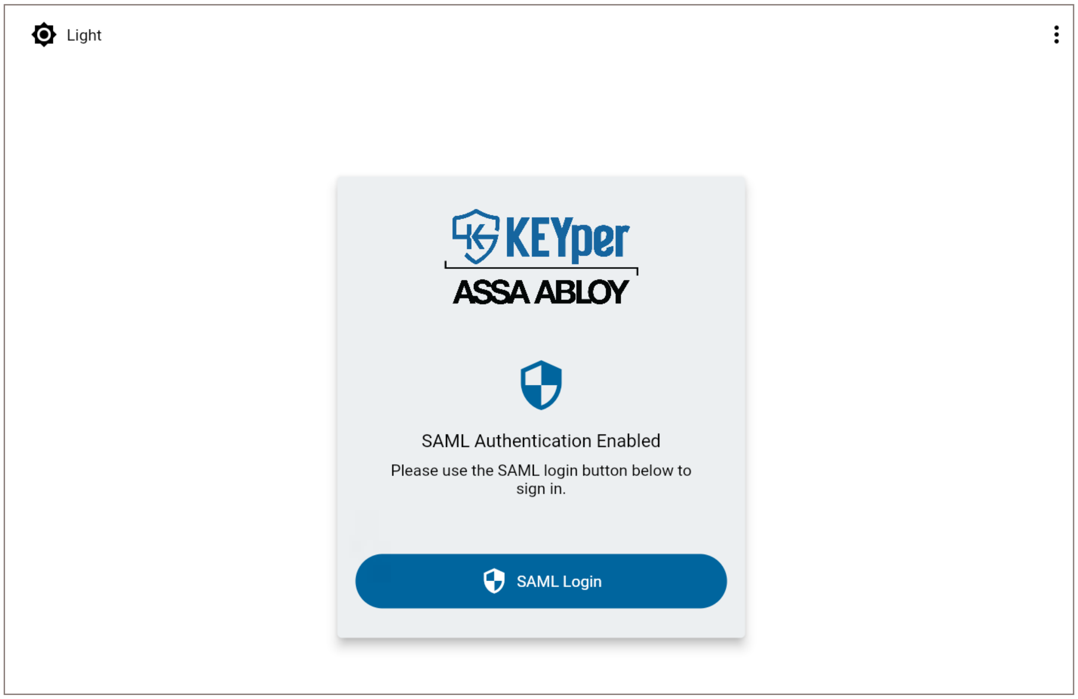


*Fig. 26 – SAML Login button*

## Navigation

The following sections will provide an overview of the major navigational elements in KEYper GO and KEYper GO Web. More detailed instructions of how to use these elements will be provided throughout this guide.

### 1. KEYper GO

The navigation buttons and menu for KEYper GO are shown in *Fig. 27* and *Fig. 28*. The content of each screen is blurred to focus on the navigational elements.

The navigation options will change depending on where you are in KEYper GO. Here are the possible elements you may encounter:

1. **Activity** button
2. **Profile** button
3. **Search** bar / **Search** button
4. **Scan** button
5. Access Card button
6. **Add** button
7. **Transfer** button

The menu at the bottom of the screen provides access to all other screens in KEYper GO. Many of these screens include tabs at the top that allow you to navigate between sub-screens. Regardless of where you are in the app, the bottom menu remains visible. The navigation options available in this menu include the following:

8. **Home**
9. **Assets**
10. **Equipment**
11. **Locate**
12. More (stores the **Admin** , **Reports** , and **Settings** buttons).


Fig. 27 – Home screen with navigational elements indicated (KEYper GO)

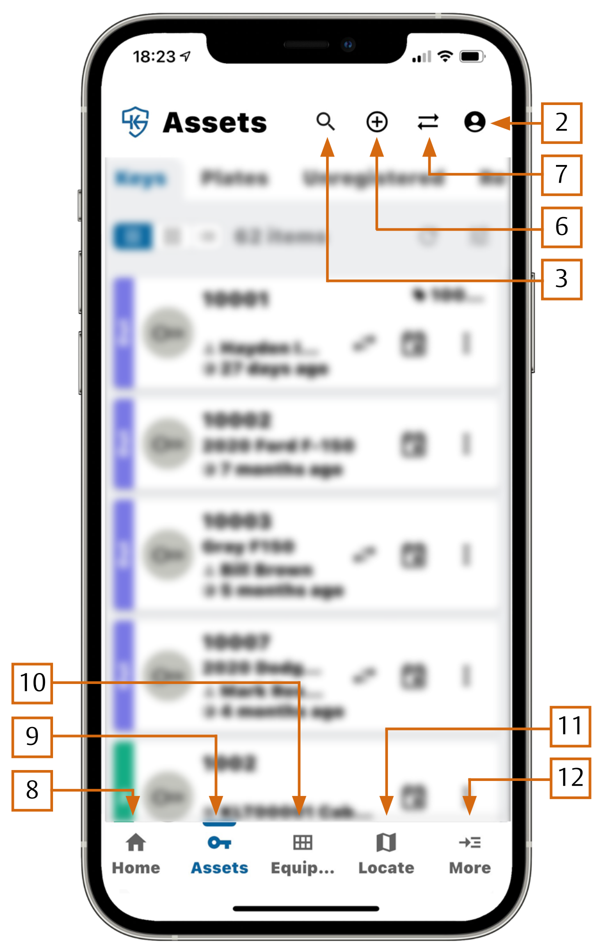


Fig. 28 – Assets screen with navigational elements indicated (KEYper GO)

## 2. KEYper GO Web

The navigation menus for KEYper GO Web are shown in ***Fig. 29***. The content of the screen is blurred to focus on the menus themselves. The menus located along the side of the screen provide navigation to all other screens. Click on the tabs at the top of each screen to navigate to the various sub-screens within. These menus appear on the screen no matter where you are in KEYper GO Web. The navigational elements that appear along every screen include the following:

1. **Search** bar
2. **Switch to the classic Web Admin** button
3. **Add** button
4. **Transfer** button
5. **Profile** button
6. **Home**
7. **Assets**
8. **Equipment**
9. **Locate**
10. **Activity**
11. **Admin**
12. **Reports**
13. **Settings**

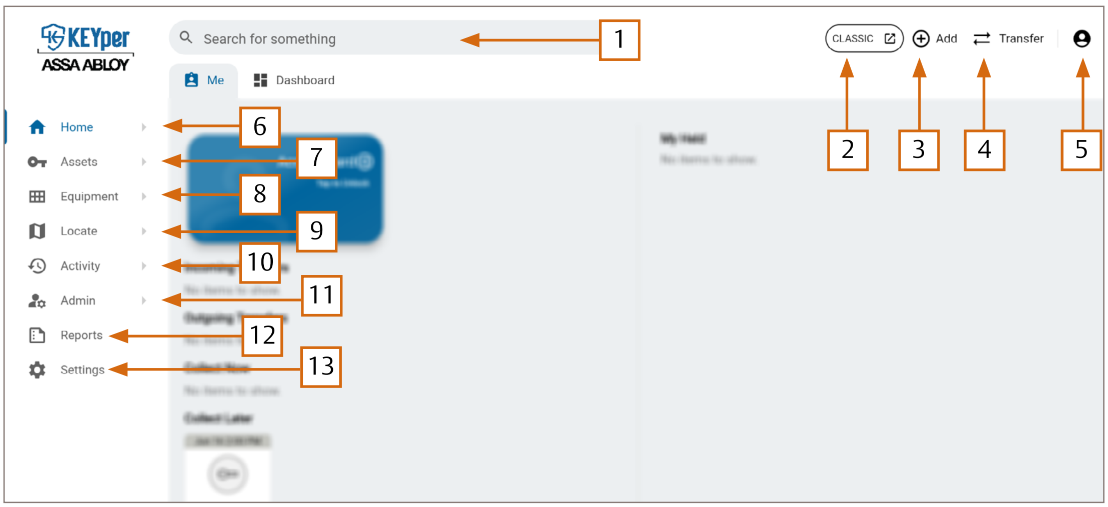


*Fig. 29 – Home screen with navigational elements indicated (KEYper GO Web)*

## Search

Selecting the **search bar** / **search** button in KEYper GO or the search bar in KEYper GO Web opens the Search screen, as shown in *Fig. 30* and *Fig. 31*. Much like with browser searches, you may enter a partial term to search across all areas of the platform. The screen also displays recently viewed items and your recent search history.

Additionally, you carry out searches using scan functionality. In KEYper GO, you can scan a Smart Tag or asset label to search for an asset. In KEYper GO Web, you may use a connected fob reader to scan a fob and display the information associated with that fob. The following sections will provide detailed instructions on how to use these features.

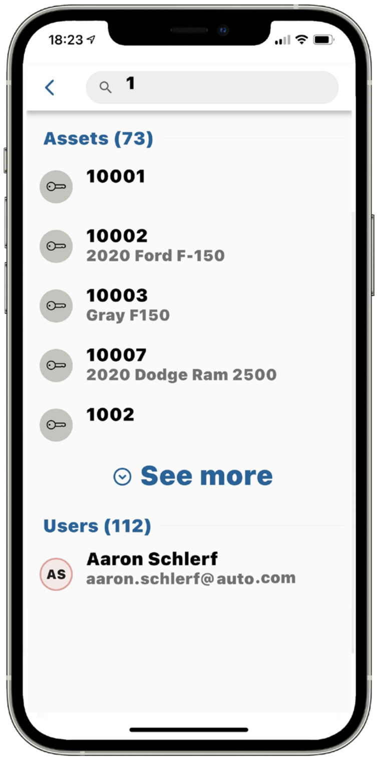

*Fig. 30 – Search screen (KEYper GO)*

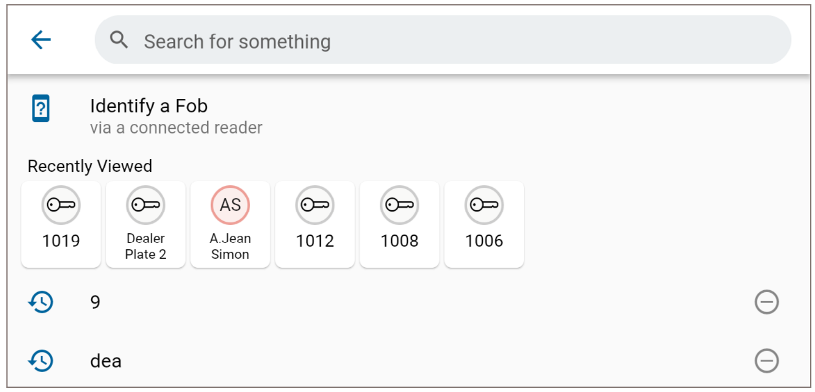

*Fig. 31 – Search screen (KEYper GO Web)*

## 1. Search for an asset record by scanning a QR code or barcode

You can scan the QR code on a Smart Tag or the barcode on an asset label to quickly retrieve information about an asset or the associated fob. To do this, follow these steps:

1. In KEYper GO, tap the **search bar** or **search** button.
2. On the Search screen, tap **Scan QR Code**.
3. Scan the QR code on the Smart Tag, shown ***Fig. 32***, or the barcode on the asset label, shown in ***Fig. 33***.
4. When the asset is identified, tap the asset name to go to the **Asset details screen**.


*Fig. 32 – Sturdifob with a Smart Tag QR code indicated*

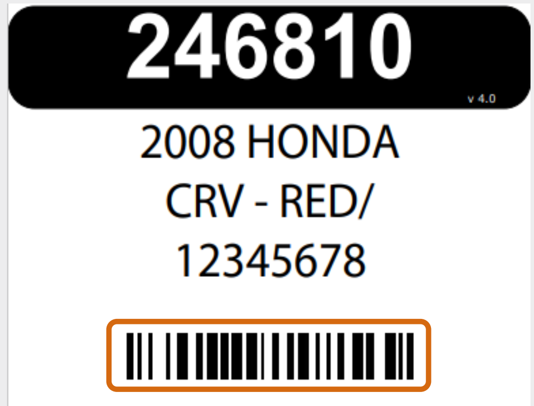


*Fig. 33 – Asset label with barcode indicated*

## 2. Identify a fob

***Note:*** *This feature is only available if you access KEYper GO Web from a browser on a desktop computer, as it requires the use of a fob reader connected via USB.*

Sometimes, you may have an empty fob or a set of keys that you need to identify. A quick way of finding out details about the fob or asset is to use the **Identify a Fob** feature on the **Search** screen. This feature may also be used to add a new asset (see **Add assets**).

### *2.1 Set up the fob reader*

To identify a fob using a connected fob reader, you will first need to set up your fob reader by doing the following:

1. Open the desktop fob reader package, as shown in ***Fig. 34***.
   - The Sturdifob reader package contains a Sturdifob reader, RJ11 to USB adapter, and a mounting bracket.
   - The iFob reader package contains an iFob reader and the RJ11 to USB adapter.


*Fig. 34 – Desktop fob reader package*

- The desktop Sturdifob reader is shown ***Fig. 35***.

*Fig. 35 – Desktop Sturdifob reader*

- The desktop iFob reader is shown in ***Fig. 36***.

*Fig. 36 – Desktop iFob reader*

2. Insert the RJ11 **male connection** into the RJ11 receiver on the USB adapter, as shown in ***Fig. 37***.

*Fig. 37 – RJ11 male connection inserted into the USB adapter*

3. If you are using a Sturdifob reader, you may wish to make it easier to read fobs by using the mounting bracket, as shown in ***Fig. 38***.
    - Affix the mounting bracket to a clean, dry, non-porous surface using the double-sided 3M tape on the mounting bracket.
    - Insert the fob reader into the mounting bracket to hold it in place.
    - If you do not have a Sturdifob reader or do not wish to use the mounting bracket, proceed to the next step.
4. Use the USB adapter on the desktop fob reader to connect the fob reader to the computer you wish to use to read fobs.

*Fig. 38 – Mounted Sturdifob reader*

5. Log in to KEYper GO Web.
6. Click the **search bar** at the top of the screen.
7. Click **Identify a Fob**.
8. If you have not yet installed a fob reader, you are prompted to download the software, as shown in ***Fig. 39***. Click the **Download the Fob Reader Installer** link and run the installer.

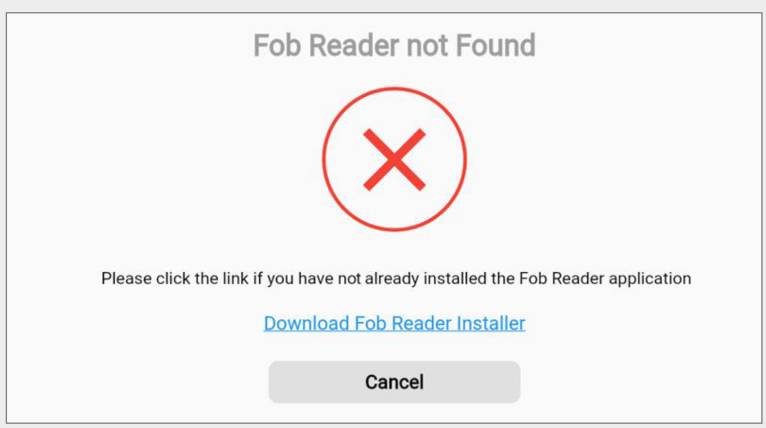


*Fig. 39 – Download the fob reader software if prompted*

### 2.2 *Identify a fob with the fob reader*

To identify a fob with the fob reader, do the following:

1. On a desktop computer with a connected USB fob reader, log in to KEYper GO Web.
   - See **Set up the fob reader** for instructions on setting up the fob reader.
2. Click the **search bar** at the top of the screen.
3. Depending on the type of fob you have, do one of the following:

*Fig. 40 – A Sturdifob on the Sturdifob reader*

*Fig. 41 – An iFob in the iFob reader*

   - **Sturdifob**: Press and hold the silver touch button on the bottom of the Sturdifob to the silver touch button on the base of the desktop Sturdifob reader, as shown in ***Fig. 40***.
   - **iFob**: Insert the rounded end of the iFob into the desktop iFob reader until you hear a click, as shown in ***Fig. 41***.

4. Click **Identify a Fob**.
   - The Asset Name and other details display identifying the fob in your possession, as shown in ***Fig. 42***.

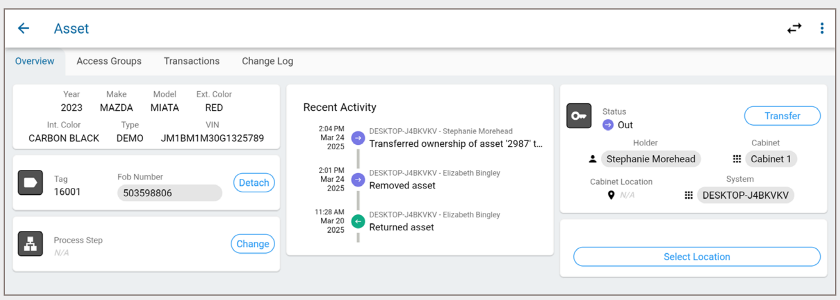


*Fig. 42 – Asset details screen displayed by using the fob reader*

## Switch to the classic Web Admin

While the functionality of KEYper GO and KEYper GO Web continues to be built upon, there are certain tasks that can only be managed within the classic web application known as the Web Admin. Customers with an on-premise solution who are not subscribed to SaaS will continue to use the classic Web Admin to administer their systems. Features available within the classic Web Admin only are notated within this guide with the icon.

If you reach a feature that is only available in the Web Admin, KEYper GO and KEYper GO Web prompt you to open the classic site, as shown in ***Fig. 43***. To switch to the classic Web Admin from within KEYper GO or KEYper GO Web, do the following:

1. Select the button to launch the Web Admin in a new browser window.
   - In KEYper GO Web, you may also click **Classic** at the top of the screen to launch the Web Admin at any time.
2. Log in to the Web Admin to continue your experience there.
   - See the **Electronic System Manual** for more information.

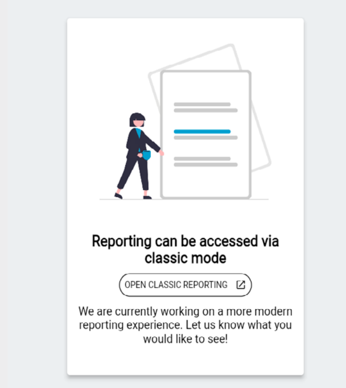


*Fig. 43 – Prompt for the Web Admin*

## Add

You can quickly add assets, reservations, inventory scans, users, and access groups from within KEYper GO and KEYper GO Web. To do this, select **Add** ⊕ to expand the menu.

In KEYper GO, **Add** ⊕ can be found on **Me** tab of the **Home** screen, as shown in ***Fig. 44***. On the **Assets**, **Equipment**, and **Locate** screens, **Add** ⊕ can be found in the upper right corner, as shown in ***Fig. 45***.

In KEYper GO Web, **Add** ⊕ can be found in the upper right corner, as shown in ***Fig. 46***.


*Fig. 44 – Home screen with Add button indicated (KEYper GO)*

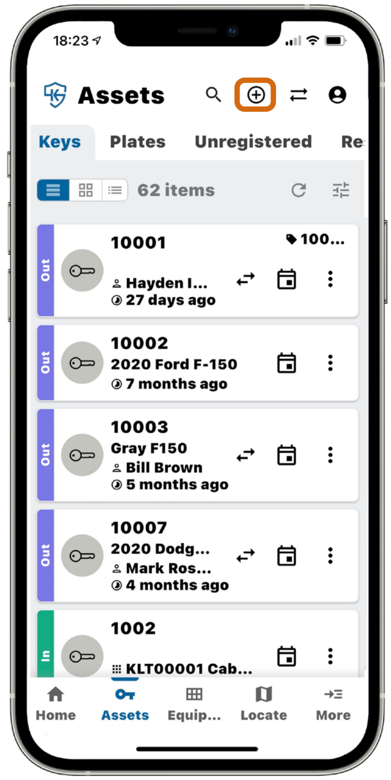


*Fig. 45 – Assets screen with Add button indicated (KEYper GO)*

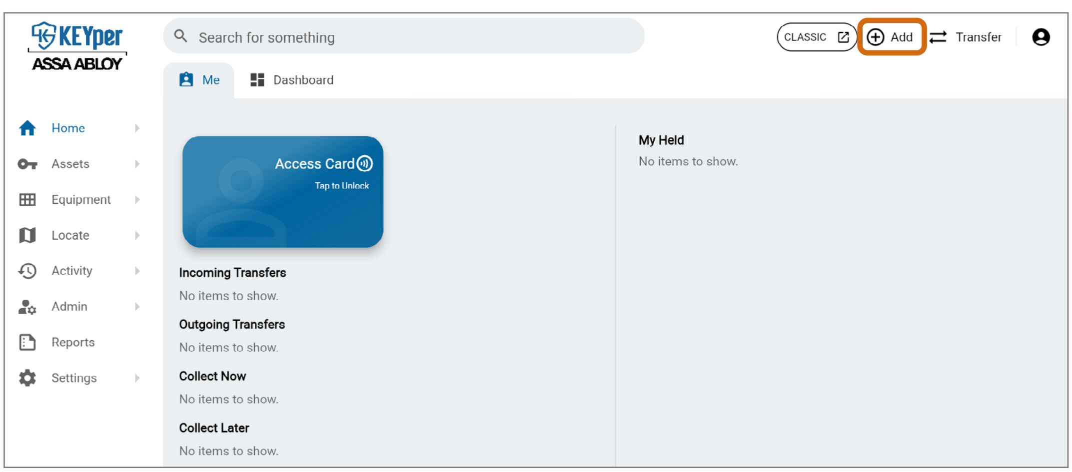


*Fig. 46 – Home screen with Add button indicated (KEYper GO Web)*

After you expand the menu, shown in ***Fig. 47*** and ***Fig. 48***, you can select what you want to add from the list of options:

- **Add assets**
- **Add reservations**
- **Add inventory scan**
- **Add user**
- **Add access group**

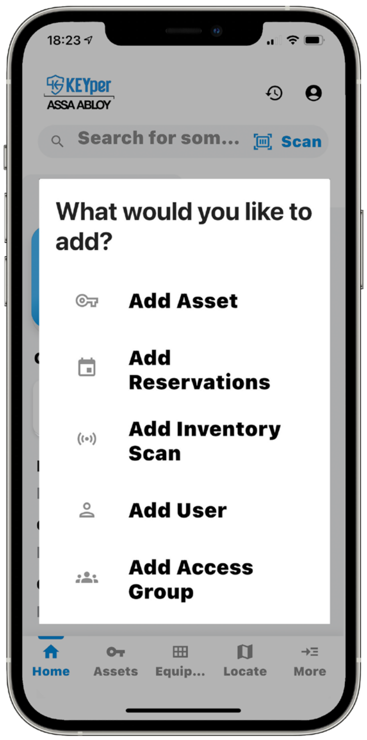


*Fig. 47 – Add menu (KEYper GO)*

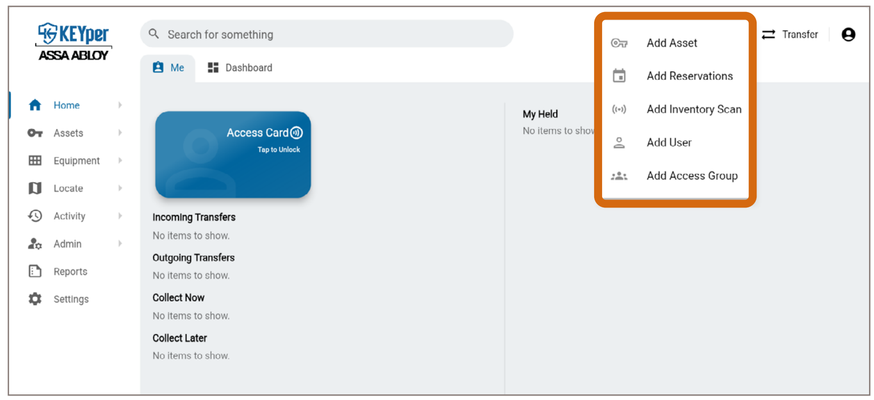


*Fig. 48 – Home screen with Add Menu indicated (KEYper GO Web)*

## 1. Add assets

***Note:*** *Only admins may add assets. See our comprehensive* ***Asset Registration and Fob Labeling Guide*** *for further information.*

Your cabinet arrives without assets attached to the fobs, meaning all fobs in the cabinet are available to be attached to a key or dealer plate. You may register individual assets or use the **Import** feature to register larger quantities of assets.

Registering an asset means inputting the asset attributes and assigning that information to a particular Sturdifob or iFob, depending on which system you have. Once an asset is registered and assigned to a fob, attach the key and optional Smart Tag to the fob.

There are four preferred methods for assigning assets to fobs:

1. **Add assets using blank fobs stored in the cabinet**
2. **Add assets using empty fobs**
3. **Add assets using the Import feature**
4. **Add assets using DMS Import and Smart Tags**

### *1.1 Add assets using blank fobs stored in the cabinet*

Individual assets can be registered on an as-needed basis by adding new assets from unregistered assets (**unused fobs without keys attached that are stored in the cabinet**). Unregistered assets associated with blank fobs that begin with "U-" and can be edited using the **Identify Asset** feature or by locating the unregistered asset on the **Unregistered Assets** tab.

#### *1.1.1 With KEYper GO Web's Identify Asset feature*

Check out unregistered assets from the kiosk as needed to add new assets to the system using the **Identify Asset** feature. This method requires the use of a desktop fob reader. See **Set up the fob reader** for installation instructions. To add an asset using a blank fob with the **Identify Asset** feature, do the following:

1. Log in to the kiosk application as an admin.
2. Tap **Admin**, as shown in ***Fig. 49***.

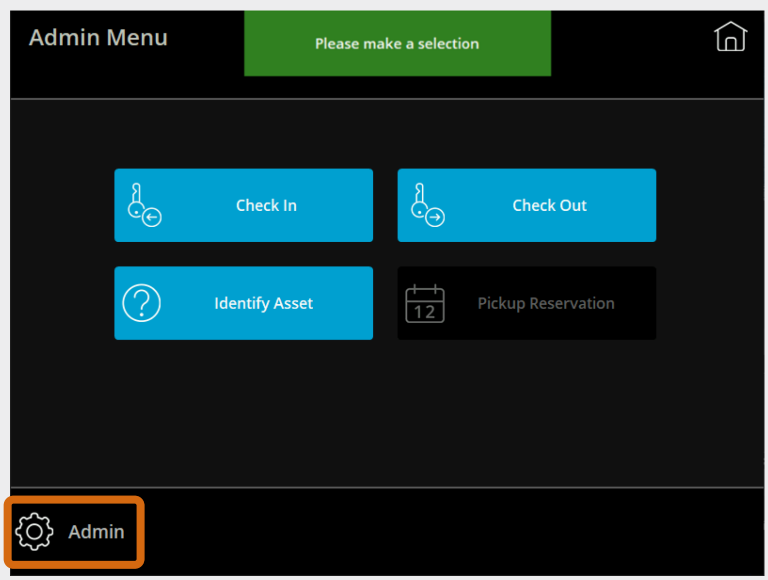


*Fig. 49 – Kiosk Admin menu screen*

3. Tap **Unregistered Assets** shown in ***Fig. 50*** to display a list of all the blank fobs currently in the cabinet.

***Note:*** *These instructions assume there are blank, unregistered fobs in the cabinet. If that is not the case, stop here and fill the cabinet with fobs. This allows the fobs to be recognized and their status set to Unregistered.*

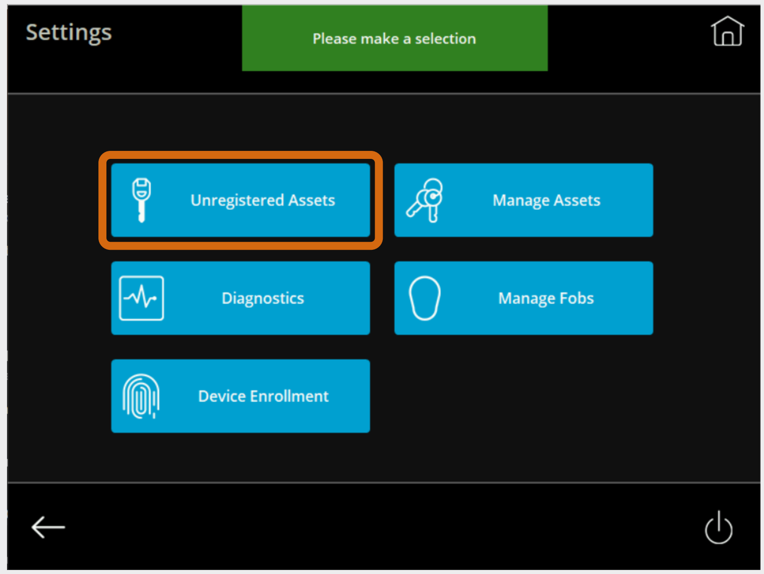


*Fig. 50 – Kiosk admin Settings screen*

4. Select as many entries as needed and tap **Check Out**, as shown in ***Fig. 51***.
   - The cabinet door unlocks. Remove the blank fob(s) indicated by the ring(s) of light. For more information, see the [Electronic System Manual](#).
   - The fobs light up sequentially after each fob is removed until all the fobs selected are retrieved.

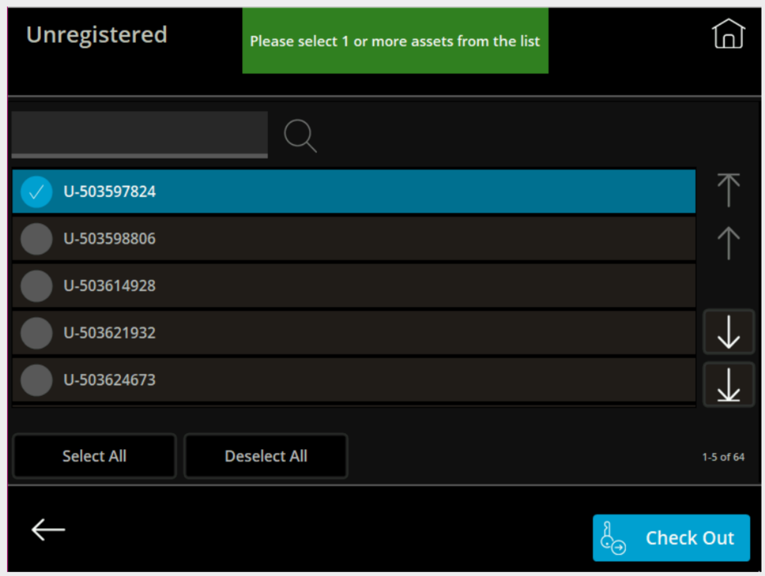


*Fig. 51 – Kiosk Unregistered assets list*

5. Log in to KEYper GO Web from a desktop computer with a connected fob reader.
6. Click the **search bar**, as shown in ***Fig. 52***.
7. Hold the Sturdifob flush against the bottom of the connected desktop Sturdifob reader or insert the iFob into the desktop iFob reader until you hear a click. See ***Fig. 40*** and ***Fig. 41***.
8. Click **Identify a Fob**, as shown in ***Fig. 52***.

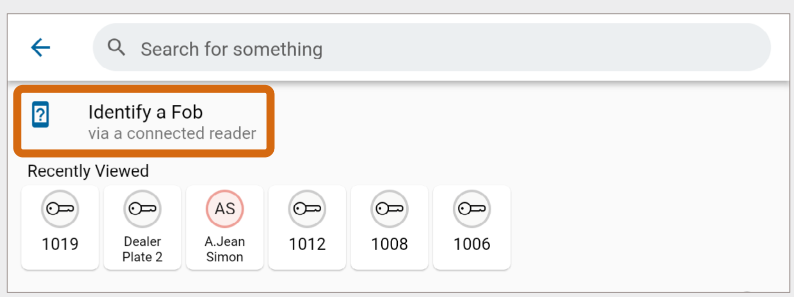


*Fig. 52 – Search screen with Identify a Fob indicated*

9. When the unregistered asset is found, click the **quick action menu** ⋮ in the upper right of the **Asset details** screen, as shown in ***Fig. 53***.
10. Click **Edit** to open the **Edit Asset** screen.

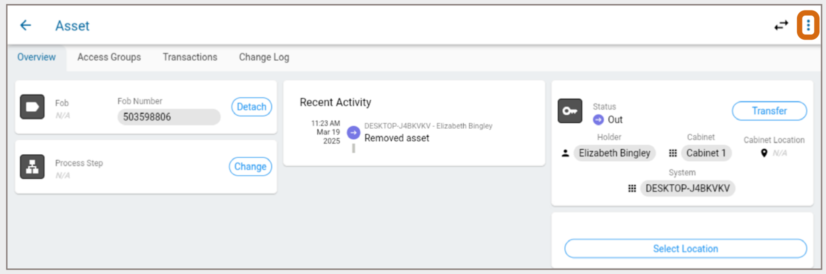

*Fig. 53 – Unregistered asset Overview tab*

11. Fill in the **Asset Details**, as shown in ***Fig. 54***:
    - **Asset Type**: This field is read-only.
    - **Asset Name**: Replace the name of the unregistered asset with an identifier, such as the stock number.
    - **Description**: Enter a description for the asset (e.g., 2011 Jeep Compass).
    - **Registered**: Always toggle the switch on. Doing so ensures the asset can be checked out.

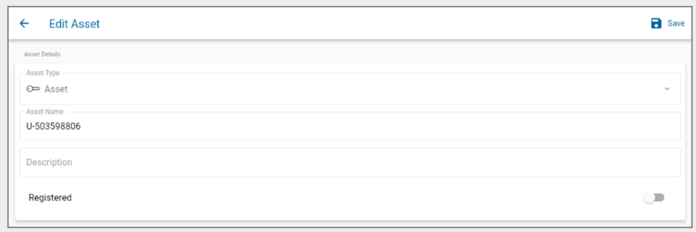

*Fig. 54 – Edit Asset screen – Asset Details*

12. Fill in the **Asset Attributes**, if desired, as shown in ***Fig. 55***, by selecting a value from the dropdown menus.
    - If your desired value does not appear in the dropdown menu, you may manually enter a value.

***Note:*** *The default asset attributes (Make, Model, etc.) are set for the automotive industry. Asset attributes are configurable for your industry within the Web Admin . For more information, see the* ***[Electronic System Manual](#)***.

- Type in the vehicle's VIN.

*Fig. 55 – Edit Asset screen – Asset Attributes*

13. Fill in the **Asset Settings**, as shown in ***Fig. 56***.
    - **Lot Location Group**: If using **Lot Location**, choose the lot location group. Selecting a lot location group determines the options available in the **Lot Location** dropdown menu. If unknown, leave blank. For more information, see **Lot Location**.
    - **Lot Location**: If using **Lot Location**, choose the lot where the asset is parked. If unknown, leave blank. For more information, see **Lot Location**.
    - **Parking Space:** If using **Lot Blocking**, select the parking space where the vehicle is parked. If unknown, leave blank. For more information, see the Web Admin guide in the **[Electronic System Manual](#)**.
    - **Checkout Requires 2nd Authenticator**: If toggled on, this user must be verified by another user (authenticator) to log in.

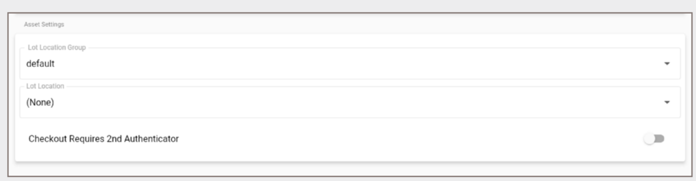

*Fig. 56 – Edit Asset screen – Asset Settings*

- **Total Mileage**: If you have the optional **Mileage Tracking** feature enabled, enter the total mileage for the vehicle. For more information, contact Support.
- **Mileage This Month**: If you have the optional **Mileage Tracking** feature enabled, enter the vehicle's mileage for this month. For more information, contact Support.

14. Click **Save** to commit your changes and return to the **Overview** tab.

15. Click the **Access Groups** tab, as shown in ***Fig. 57***.
16. Select the access groups for the asset using the **Enabled** column.
    - The members of the selected access groups are the only users able to check out this asset. Admins are automatically made members of all access groups and thus have no restrictions on the assets they may check out.
    - The asset is automatically assigned to the default access group. Uncheck the box if that does not apply.

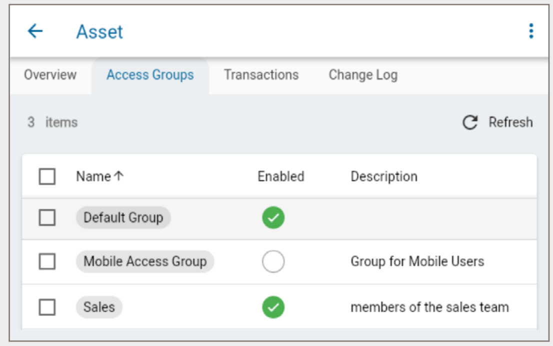


*Fig. 57 – Asset screen – Access Groups tab*

***Note:*** *If an asset is assigned to multiple access groups, the broadest permissions will override the more restrictive permissions in place for a bespoke access group. For example, if you have an access group for Maintenance employees with permissions restricted to specific hours or the assets within the Maintenance process step, those restrictions are overridden by the broader, non-restricted access afforded by the default access group. To utilize the parameters of the more restricted access group, you* ***must*** *remove the asset from the default access group.*

17. Click the **back arrow** to save your changes.
18. Physically attach the key to the fob as described in the Kiosk guide in the **Electronic System Manual**.
19. Check in the asset using the kiosk application.

### *1.1.2 From the Unregistered tab of the Assets screen*

You may also add assets directly to blank fobs listed within KEYper GO or KEYper GO Web. To add an asset using a blank fob found on the **Unregistered** tab of the **Assets** screen, do the following:

1. Log in to KEYper GO or KEYper GO Web.
2. Select **Assets**, then **Unregistered**, as shown in ***Fig. 58*** and ***Fig. 59***.

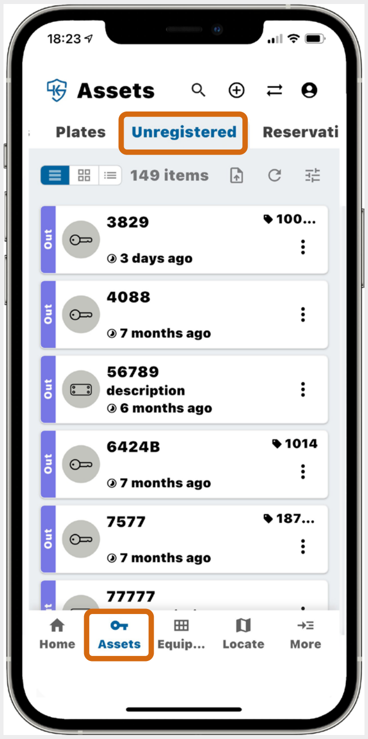


*Fig. 58 – Tap Assets and Unregistered (KEYper GO)*

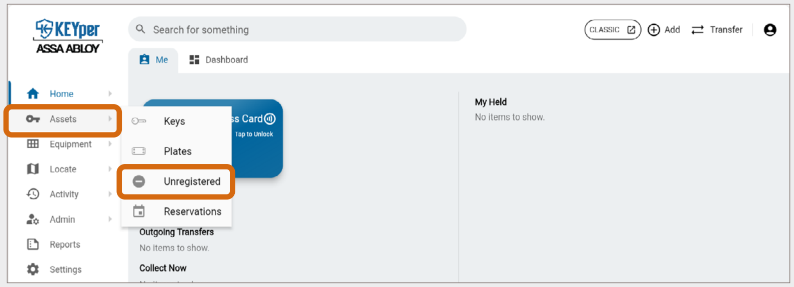


*Fig. 59 – Click Assets and Unregistered (KEYper GO Web)*

3. Choose an **unregistered asset** from the list to navigate to the **Asset Overview** screen, as shown in ***Fig. 60***.

   All unregistered assets in your system are displayed in a **List** view ( button) by default. Select **Grid** ( button) or **Table** ( button) to change the view, if desired.

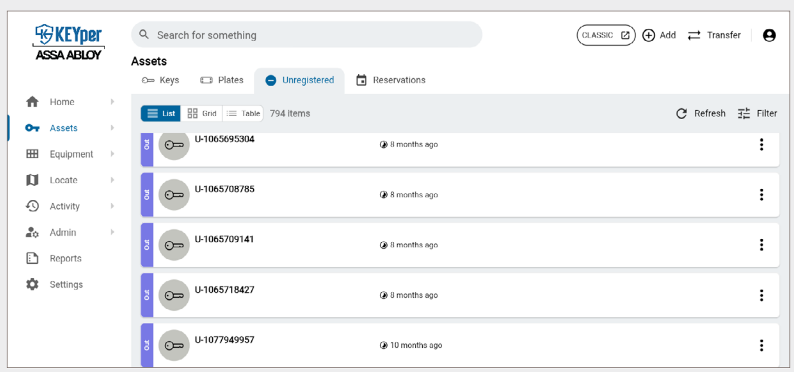


*Fig. 60 – Select an unregistered asset*

4. Select the **quick action menu** ⋮ in the upper right of the Asset details screen, as shown in ***Fig. 61***.

5. Select **Edit** to open the **Edit Asset** screen.

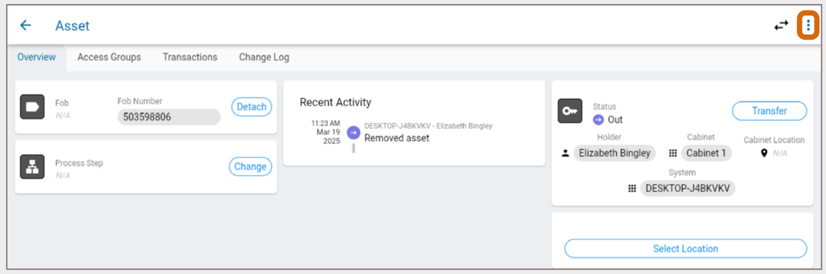


*Fig. 61 – Unregistered asset found*

6. Fill in the **Asset Details**, as shown in ***Fig. 62***:
   - **Asset Type**: This field is read-only.
   - **Asset Name**: Replace the name of the unregistered asset with an identifier, such as the stock number.
   - **Description**: Enter a description for the asset (e.g., 2011 Jeep Compass).
   - **Registered**: Always toggle the switch on. Doing so ensures the asset can be checked out.

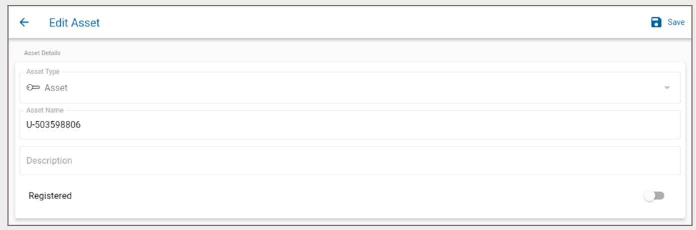


*Fig. 62 – Edit Asset screen – Asset Details*

7. Fill in the **Asset Attributes**, if desired, as shown in ***Fig. 63***, by selecting a value from the dropdown menus.
   - If your desired value does not appear in the dropdown menu, you may manually enter a value.

***Note:*** *The default asset attributes (Make, Model, etc.) are set for the automotive industry. Asset attributes are configurable for your industry within the Web Admin. For more information, see the Web Admin guide in the* ***Electronic System Manual****.*

   - Enter the vehicle's VIN.


*Fig. 63 – Edit Asset screen – Asset Attributes*

8. Fill in the **Asset Settings**, as shown in ***Fig. 64***.
   - **Lot Location Group**: If using **Lot Location**, choose the lot location group. Selecting a lot location group determines the options available in the **Lot Location** dropdown menu. If unknown, leave blank. For more information, see **Lot Location**.
   - **Lot Location**: If using **Lot Location**, choose the lot where the asset is parked. If unknown, leave blank. For more information, see **Lot Location**.
   - **Parking Space:** If using **Lot Blocking**, select the parking space where the vehicle is parked. If unknown, leave blank. For more information, see the Web Admin guide in the **Electronic System Manual**.
   - **Checkout Requires 2nd Authenticator**: If toggled on, this user must be verified by another user (authenticator) to log in.

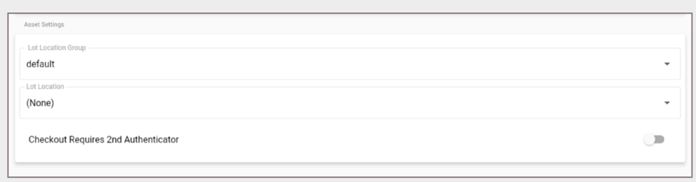


*Fig. 64 – Edit Asset screen – Asset Settings*

- **Total Mileage**: If you have the optional **Mileage Tracking** feature enabled, enter the total mileage for the vehicle. For more information, contact Support.
- **Mileage This Month**: If you have the optional **Mileage Tracking** feature enabled, enter the vehicle's mileage for this month. For more information, contact Support.

9. Select **Save** to commit your changes and return to the **Overview** tab.
10. Select the **Access Groups** tab, as shown in ***Fig. 65***.
11. Select the access groups for the asset using the **Enabled** column.
    - The members of the selected access groups are the only users able to check out this asset. Admins are automatically made members of all access groups and thus have no restrictions on the assets they may check out.
    - The asset is automatically assigned to the default access group. Uncheck the box if that does not apply.

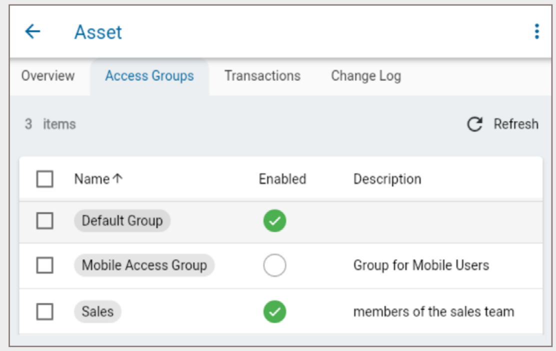


*Fig. 65 – Asset screen – Access Groups tab*

***Note:*** *If an asset is assigned to multiple access groups, the broadest permissions will override the more restrictive permissions in place for a bespoke access group. For example, if you have an access group for Maintenance employees with permissions restricted to specific hours or the assets within the Maintenance process step, those restrictions are overridden by the broader, non-restricted access afforded by the default access group. To utilize the parameters of the more restricted access group, you* ***must*** *remove the asset from the default access group.*

12. Select the **back arrow** to save your changes.
13. Check out the asset at the kiosk cabinet.

***Note:*** *If you do not see the new asset, try restarting the kiosk application.*

14. Physically attach the key to the fob as described in the Kiosk guide in the **Electronic System Manual**.
15. Check in the asset using the kiosk application.

## 1.2 *Add assets using empty fobs*

Use this method to register individual assets on an as-needed basis by creating a new asset record. **This method only applies to empty fobs – those that have never been inserted into the cabinet or whose unregistered asset record has been deleted.** This method requires the use of a desktop fob reader. See **Set up the fob reader** for installation instructions.

This section shows you how to add three types of assets using blank fobs: assets (keys), dealer plates, and spare keys.

### 1.2.1 *Add an asset (key, dealer plate, spare key) using an empty fob*

To add an assets using an empty fob, do the following:

1. Log in to KEYper GO Web from a desktop computer with a connected fob reader.
2. Click **Add** ⊕, then click **Add Asset**, as shown in ***Fig. 66***.

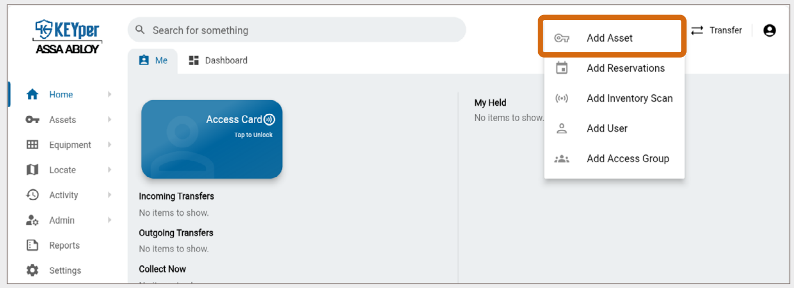


*Fig. 66 – Select Add Asset from the Add menu*

3. Fill in the **Asset Details**, as shown in ***Fig. 67***:
   - **Asset Type**: Choose **Asset** (key), **Dealer Plate**, or **Spare Key** from the dropdown menu.
     - If you choose **Spare Key**, a new field appears called **Parent Asset**. You should only create a spare key after you have created its parent asset, or main key.
   - **Asset Name**: Give the asset an identifier, such as the stock number.
     - This field is auto-populated and read-only for spare keys. Spare keys share the name of the parent asset with an –X appended.
   - **Description**: Enter a description for the asset (e.g., 2011 Jeep Compass).
   - **Registered**: Ensure the switch is toggled on. Doing so ensures the asset can be checked out.

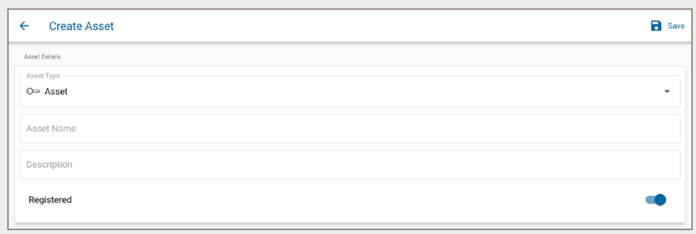


*Fig. 67 – Create Asset screen – Asset Details*

4. Fill in the **Asset Attributes**, if desired, as shown in ***Fig. 68***, by selecting a value from the dropdown menus.
   - If your desired value does not appear in the dropdown menu, you may manually enter a value.

   ***Note:*** *The default asset attributes (Make, Model, etc.) are set for the automotive industry. Asset attributes are configurable for your industry within the Web Admin. For more information on asset attributes, see the Web Admin guide in the* ***Electronic System Manual***.

   - Type in the vehicle's VIN.
   - Asset attributes are auto-populated with the details from the parent asset for spare keys.
   - These fields are not necessary for dealer plates.

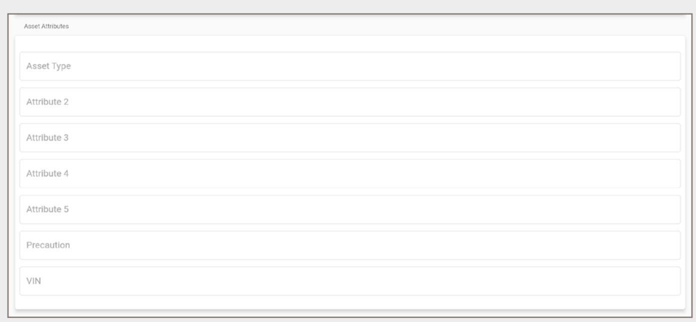


*Fig. 68 – Create Asset screen – Asset Attributes*

5. Fill in the **Asset Settings**, as shown in ***Fig. 69***.

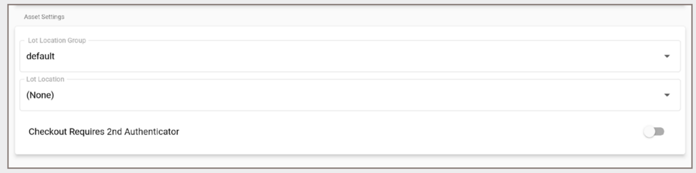


*Fig. 69 – Create Asset screen – Asset Settings*

- **Lot Location Group**: If using **Lot Location**, choose the lot location group. Selecting a lot location group determines the options available in the **Lot Location** dropdown menu. If unknown, leave blank. For more information, see **Lot Location**.
- **Lot Location**: If using **Lot Location**, choose the lot where the asset is parked. If unknown, leave blank. For more information, see **Lot Location**.
- **Parking Space:** If using **Lot Blocking**, select the parking space where the vehicle is parked. If unknown, leave blank. For more information, see the Web Admin guide in the **Electronic System Manual**.
- **Checkout Requires 2nd Authenticator**: If toggled on, this user must be verified by another user (authenticator) to log in.
- **Total Mileage**: If you have the optional **Mileage Tracking** feature enabled, enter the total mileage for the vehicle. For more information, contact Support.
- **Mileage This Month**: If you have the optional **Mileage Tracking** feature enabled, enter the vehicle's mileage for this month. For more information, contact Support.

6. Click **Save**.
   - You are redirected to the **Access Groups** tab as shown in ***Fig. 70***.
7. Select the access groups for the asset.
   - The members of the selected access groups are the only users able to check out this asset. Admins are automatically made members of all access groups and thus have no restrictions on the assets they may check out.
   - The asset is automatically assigned to the default access group. Uncheck the box if that does not apply.

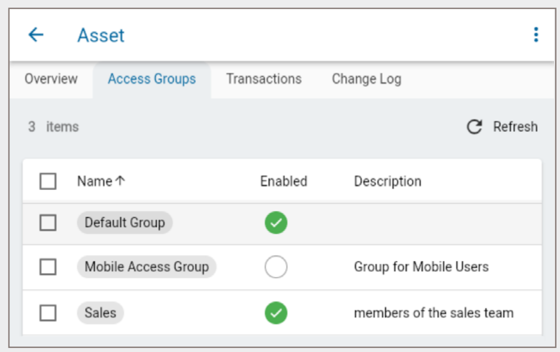


*Fig. 70 – Asset screen – Access Groups tab*

***Note:*** *If an asset is assigned to multiple access groups, the broadest permissions will override the more restrictive permissions in place for a bespoke access group. For example, if you have an access group for Maintenance employees with permissions restricted to specific hours or the assets within the Maintenance process step, those restrictions are overridden by the broader, non-restricted access afforded by the default access group. To utilize the parameters of the more restricted access group, you* ***must*** *remove the asset from the default access group.*

8. Click the **quick action menu** ⋮ in the upper right of the Asset details screen, as shown in ***Fig. 71***.
   - Click **Attach Fob** to open the **Identify a Fob** screen.
9. Hold the Sturdifob flush against the bottom of the desktop Sturdifob reader or insert the iFob into the desktop iFob reader until you hear a click. See ***Fig. 40*** and ***Fig. 41***.
   - Click **Identify a Fob**, as shown in ***Fig. 52***.
   - A success message reading "Fob attached successfully" displays when the asset has been assigned to the fob.
10. Physically attach the key to the fob as described in the Kiosk guide in the **Electronic System Manual**.
11. Check in the asset using the kiosk application.

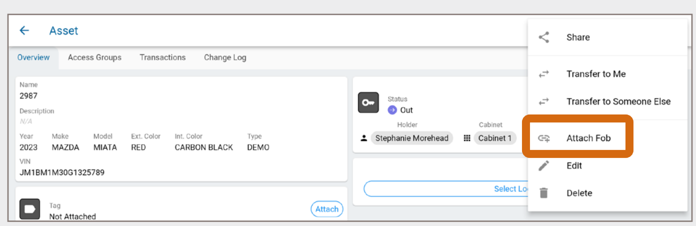


*Fig. 71 – Select Attach Fob from the quick action menu*

### 1.3 *Add assets using the Import feature*

The **Import** feature allows you to import asset information to the system and then assign assets to fobs. This feature is especially useful during the initial installation of the system as it facilitates rapid asset registration by populating the asset attribute databases.

To successfully import assets, the following requirements must be met:

- You must create a CSV file containing the information for the assets you wish to import.
- The asset information in the CSV file must be in the format shown below, including the header row.
- The easiest way to create a CSV file is by using Excel, but other methods are acceptable.

| A | B | C | D | E | F | G | H | I | J | K | L | M |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Name | Year | Make | Model | Ext. Color | Int. Color | Type | VIN | Fob Number | Asset Type | Registration Status | Spare Key | Description |
| Sample Asset 1 | value for Year | value for Make | value for Model | value for Ext. Color | value for Int. Color | value for Type | value for VIN | 101234567 | Asset | Registered | TRUE | Description text 1 |
| Sample Asset 2 | another value for Year | another value for Make | another value for Model | another value for Ext. Color | another value for Int. | another value for Type | another value for VIN | 101234568 | Asset | Unregistered | FALSE | Description text 2 |

*Fig. 72 – Asset import format with header row*

To import assets in KEYper GO or KEYper GO Web, do the following:

1. Log in to KEYper GO or KEYper GO Web.
2. Select **Assets**.
3. On the **Assets** screen, select **Import** , shown in ***Fig. 73*** and ***Fig. 74***.

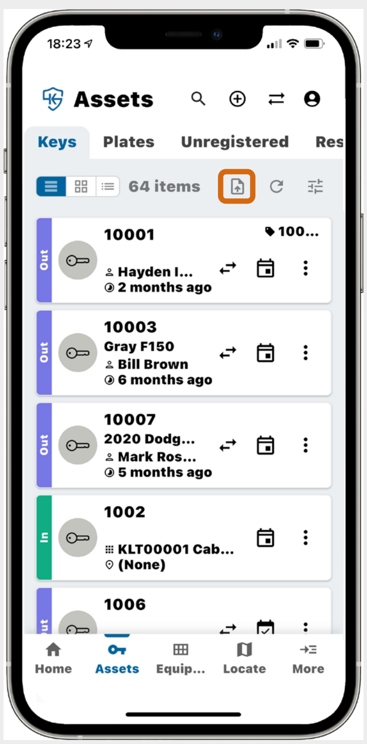


*Fig. 73 – Assets screen with Import button indicated (KEYper GO)*

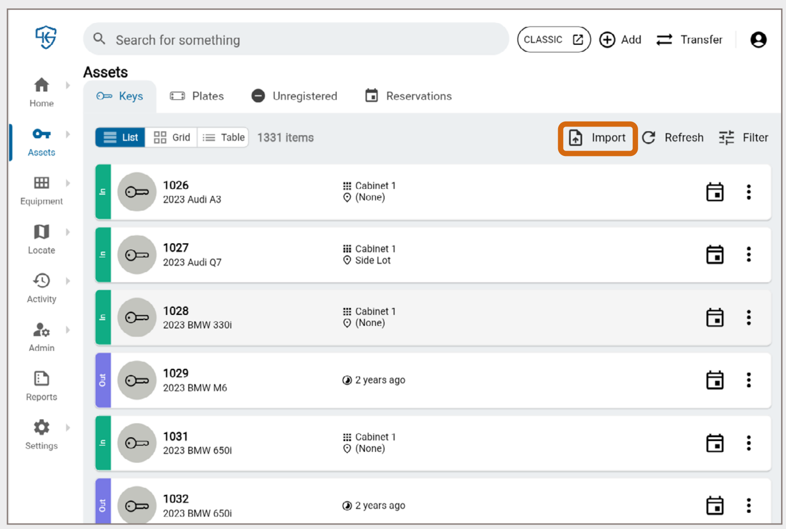


*Fig. 74 – Assets screen with Import button indicated (KEYper GO Web)*

4. Create a CSV file with the information for the assets you wish to import.

Your CSV should have a header row and each asset that you wish to import should its own row formatted as follows (* indicates required information):

***Note:*** *This format is for systems using default automotive attributes. If your system uses custom attributes, contact Support.*

- **Name**:* The name or unique identifier for the asset (e.g., stock number).
- **Year**: The vehicle's model-year.
- **Make**: The vehicle's brand/manufacturer.
- **Model**: The vehicle's model.
- **Ext. Color**: The color of the vehicle's exterior.
- **Int. Color**: The color of the vehicle's interior.
- **Type:** The condition of the vehicle. Enter "New" or "Used."
- **VIN:** The vehicle's VIN.
- **Fob Number**: The serial number for the fob you wish to assign to the asset.

***Note:*** *If you import an asset without a fob number, you must go to the* ***Asset details screen*** *for the asset after import and attach a fob using the quick action menu (see* ***Quick action menu****). Otherwise, the asset cannot be checked out.*

- **Asset Type**: The type of asset you are importing. Enter "Asset" for primary vehicle keys, "Dealer Plate," or "Spare Key."
- **Registration Status**: The asset's registration status. Enter "Registered" or "Unregistered."

***Note:*** *If you import an unregistered asset, you must go to the* ***Asset details screen*** *for the asset after it has been successfully imported, edit the asset (see* ***Quick action menu****), and toggle on the* ***Registered*** *field. Otherwise, the asset cannot be checked out.*

- **Spare Key**: Indicates if the asset has a spare key. If yes, enter the fob number or "True." If no spare key exists, enter "False." Leaving this blank means no spare key will be associated. Spare keys are imported with "- X" added to the end of the parent asset's name.

***Note:*** *If you import an unregistered asset that has a spare key, you must go to the* ***Asset details screen*** *for the spare key after import, edit the spare key (see* ***Quick action menu****), and toggle on the* ***Registered*** *field. Otherwise, the spare key cannot be checked out.*

***Note:*** *After import, you must go to the* ***Asset details screen*** *for the spare key and attach a fob using the quick action menu. Otherwise, the spare key cannot be checked out.*

- **Description**: Enter a description for the vehicle.

***Note****: You can view the CSV format and access a template by clicking* ***Sample CSV****. In the* ***Sample CSV*** *window (shown in* ***Fig. 75****), select* ***Copy*** *to copy the template. If you are using KEYper GO Web, click* ***Download*** *to download an Excel version. When finished, select* ***Close****.*

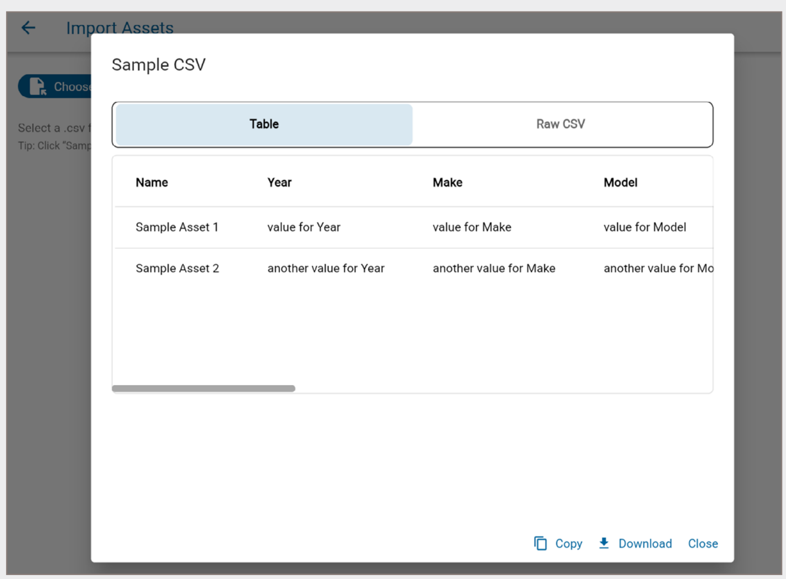


*Fig. 75 – Sample CSV window (assets)*

5. When you have finished creating the CSV file, select **Choose CSV** on the **Import Assets** screen and select your CSV file.
6. Select the CSV delimiter from the dropdown menu.
   - The delimiter separates values in the CSV file. The default is a comma, but you can choose **Semicolon**, **Tab**, **Pipe**, or select **Custom** and enter your own delimiter.
7. When you are ready to import the assets, select **Upload CSV**, shown in ***Fig. 76***.
8. On the **Confirm Import** window, select **Continue**.

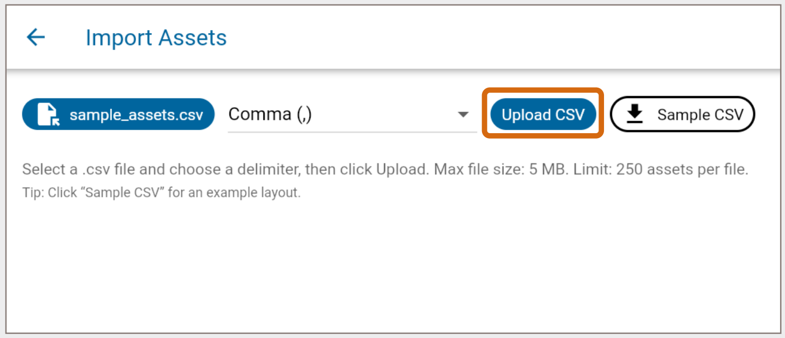


*Fig. 76 – Import Assets screen with Upload CSV indicated*

   - When the import is finished, you will see the number of assets that were successfully imported and if any assets were skipped (as shown in ***Fig. 77***). Additionally, you can review warnings about issues in the CSV file that may have prevented assets from being imported by expanding the **Warnings** list.
   - Each successfully imported asset will now have its own asset record accessible from the **Assets** screen or via search.

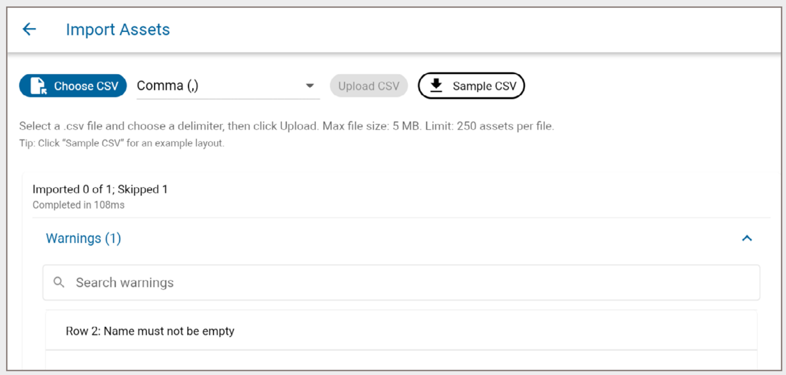


*Fig. 77 – Import results*

9. If you imported an asset without a fob number, you must go to the **Asset details screen** and attach a fob using the **quick action menu** (see **Quick action menu**). All spare keys also require you to attach a fob after import. Assets and spare keys without a fob number cannot be checked out.
10. If you import an unregistered asset, you must go to the **Asset details screen** for the asset after it has been successfully imported, edit the asset (see **Quick action menu**), and toggle on the **Registered** field. Otherwise, the asset cannot be checked out. If the unregistered asset was imported with a spare key, repeat this process for the spare key as well.
11. Physically attach the key to the fob as described in the Kiosk guide in the **Electronic System Manual**.
12. Check in the asset using the kiosk application.

### 1.4 *Add assets using DMS Import and Smart Tags*

You can quickly add multiple assets to your system using the **DMS Import** feature in the Web Admin and Smart Tags. This method streamlines setup and allows you to assign keys to fobs using their unique codes, without needing a fob reader.

The following sections will show you how to add assets using **DMS Import** and Smart Tags.
***Note****: In the EMEIA region, your system will arrive with the fobs already physically attached to the Smart Tags, and the Smart Tags will be pre-registered. As a result, you can skip* ***Physically attach and register Smart Tags*** *when setting up your system. However, if you add more fobs or Smart Tags after installation, you will need to follow the steps in* ***Physically attach and register Smart Tags****.*

#### *1.4.1 Physically attach and register Smart Tags*

First, you will physically attach the Smart Tags to the fobs and register them at the kiosk cabinet using the **Batch Specify** feature. For instructions on this process, see "Register tags at the kiosk cabinet" in the **Asset Registration and Fob Labeling Guide**.

#### *1.4.2 Delete unregistered assets and import new assets*

Next, you will delete the unregistered assets created automatically by the system and import your assets by doing the following:

1. Remove the fobs from the cabinet(s).
   - These fobs are considered unregistered assets and should be removed by following the steps in the Kiosk guide in the **Electronic System Manual**.
   - After removal be sure to store the fobs securely.
2. Log in to the Web Admin and navigate to the **Assets** tab.
3. On the **Asset Count** screen, delete the unregistered assets.
   - To do this, you can click the checkbox in the header row to select all the unregistered assets, then click **Delete Selected**, shown in *Fig. 78*. On the message that appears, click **OK** to confirm you wish to delete the unregistered assets.
   - The Smart Tag will remain associated to the fob via the fob's serial number.

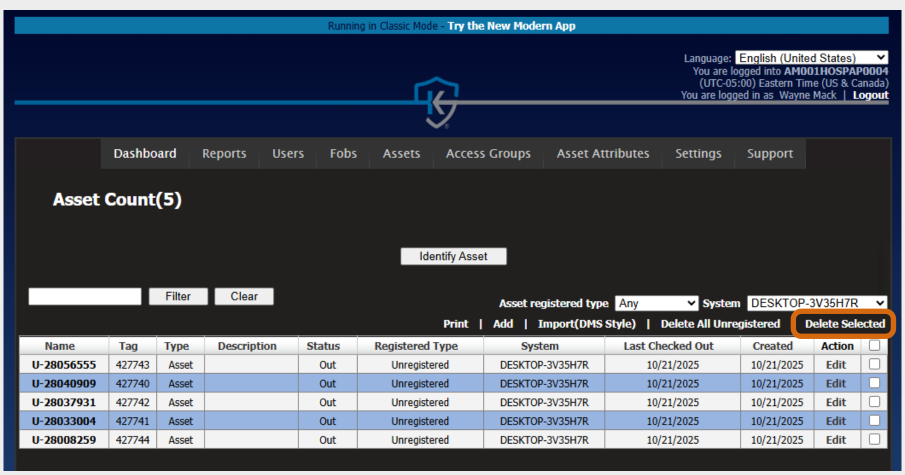


*Fig. 78 – Web Admin Asset Count screen with Delete Selected indicated*

4. To import assets, **click Import(DMS Style)**, shown in ***Fig. 79***.
   - *Customers in the EMEIA region may also choose to import assets prior to the Smart Tag registration in production. Your specific workflow and system configuration will be reviewed during the system purchase process.*

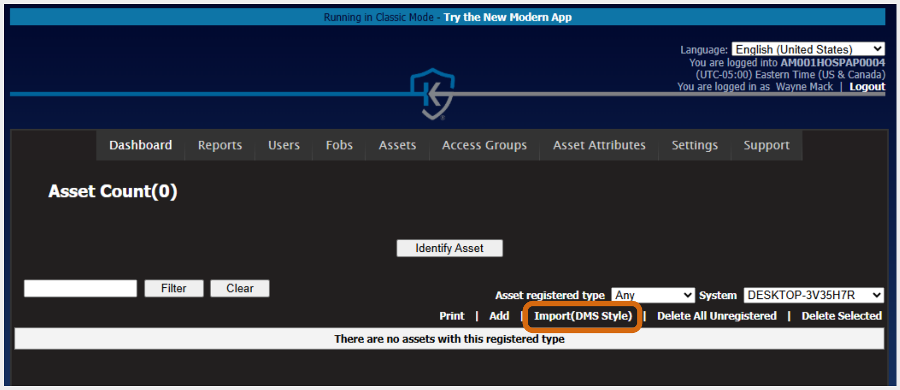


*Fig. 79 – Asset Count screen with Import(DMS Style) button indicated*

5. Create a CSV file that adheres to the format shown in the **Example** link the Web Admin. For more information, see the **Electronic System Manual**.
6. Click **Choose File** and upload the CSV file.
7. Once the file has been uploaded, click **Import**.

A table with an entry for each imported asset will display. The **Status** and **Description** fields will show if the asset imported successfully. See ***Fig. 80***.

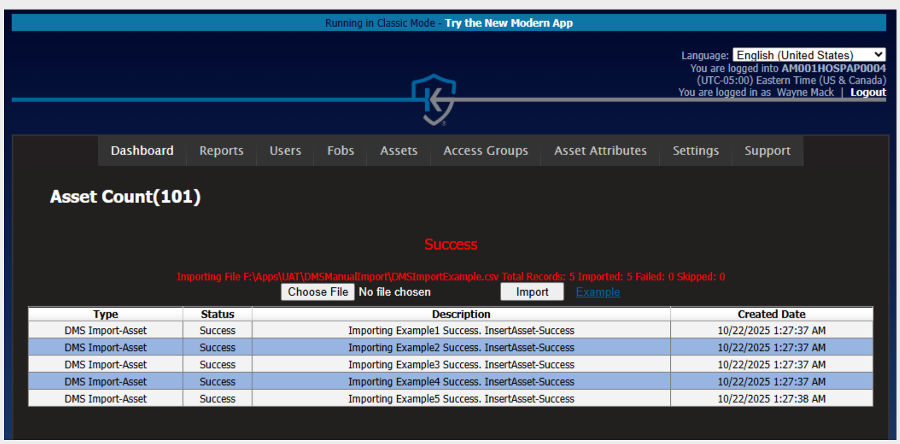


*Fig. 80 – Successful DMS Import*

### 1.5 Digitally attach Smart Tags to assets

Once you have attached and registered the Smart Tags and deleted the unregistered assets, you must digitally attach the Smart Tags to the assets. The following sections will show you how to digitally attach Smart Tags to assets using KEYper GO or KEYper GO Web.

#### 1.5.1 Digitally attach Smart Tags to assets with KEYper GO

This section will show you how to digitally attach Smart Tags to your imported assets using KEYper GO. You may repeat these steps for each imported asset. However, you are not required to handle every asset at once. Instead, you may digitally attach Smart Tags to assets as needed.

***Note:*** *You can also digitally attach Smart Tags to assets using KEYper GO Web. However, this process differs slightly. For more information, see* ***Digitally attach Smart Tags to assets with KEYper GO Web***.

To digitally attach Smart Tags to assets with KEYper GO, do the following:

1. Log in to KEYper GO.
2. Search for an imported asset.
   - You can do this by entering the asset name/stock number in the **search bar**, as shown in ***Fig. 81***.
   - From the search results, tap the asset name/stock number for the asset you wish to access.


*Fig. 81 – Search for an imported asset*

3. On the Asset details screen, tap **Attach**, shown in *Fig. 82*.
4. On the screen that appears, tap **Scan QR Code**.
5. Scan the QR code on the Smart Tag.
6. Once the Smart Tag is identified, tap **Submit.**

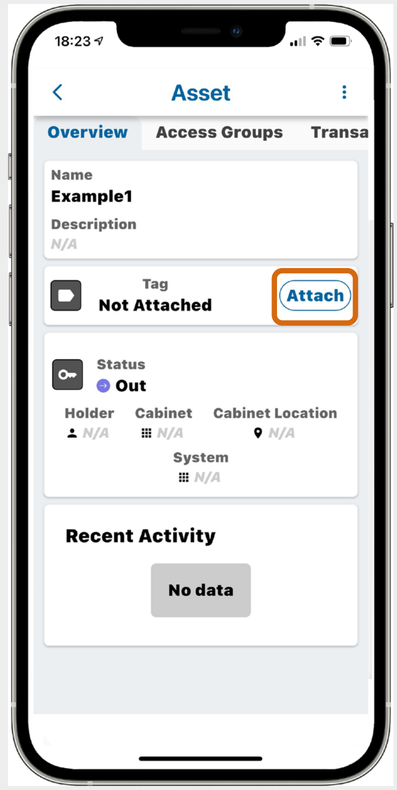


*Fig. 82 – Asset details screen with Attach button indicated*

You will be brought to the Asset details screen with the digitally attached tag number (**Tag**) and fob serial number (**Fob Number**) listed. See *Fig. 83*.

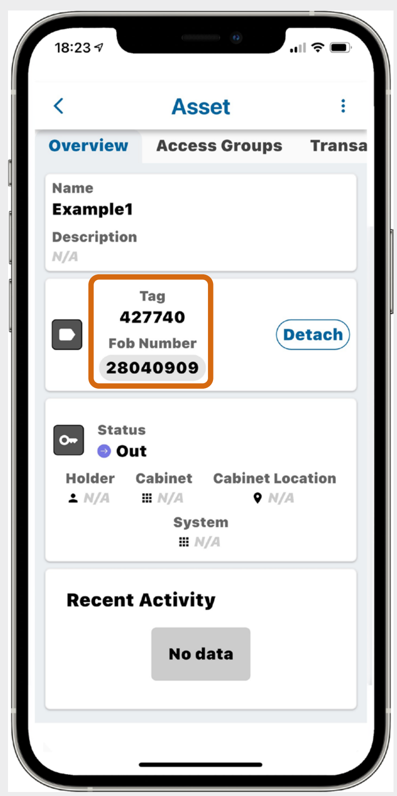


*Fig. 83 – Asset details screen with attached Smart Tag and fob information indicated*

7. On the Asset details screen, tap the **quick action menu** ⋮, shown in ***Fig. 84***, then select **Edit**.

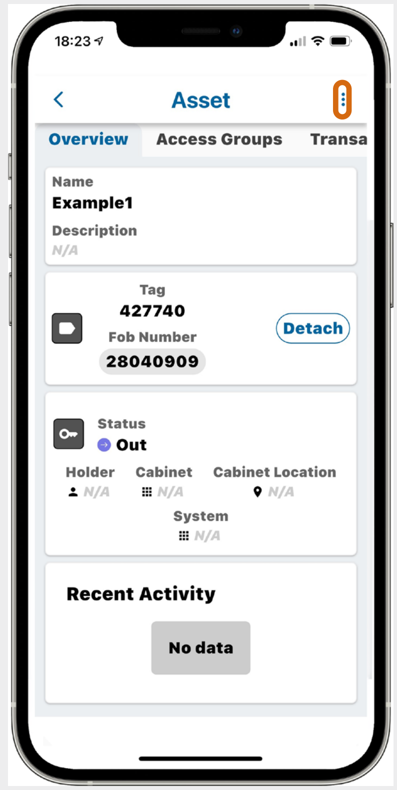


*Fig. 84 – Asset details screen with quick action menu indicated*

8. In the **Asset Details** area of the **Edit Asset** screen, toggle on the **Registered** field, shown in ***Fig. 85***.
9. Tap **Save**.

   You will be brought to the Asset details screen when you have successfully registered the asset.

10. Physically attach the key to the fob as described in the Kiosk guide in the [Electronic System Manual](#).
11. Check in the asset using the kiosk application.

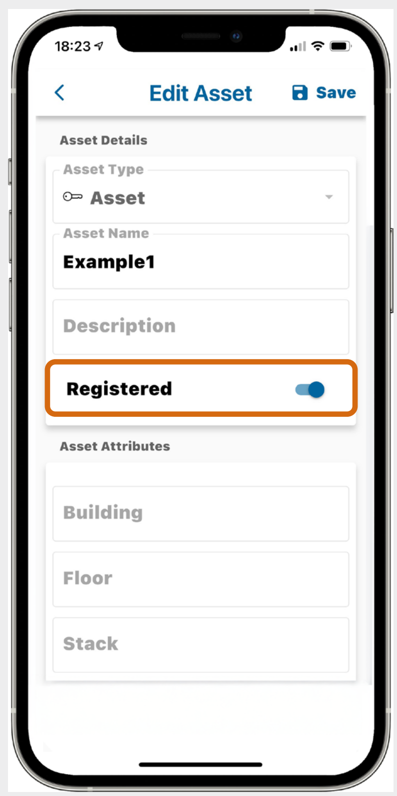


*Fig. 85 – Edit Asset screen with Registered toggle indicated*

### 1.5.2 Digitally attach Smart Tags to assets with KEYper GO Web

This section will show you how to digitally attach Smart Tags to your imported assets using KEYper GO Web. You may repeat these steps for each imported asset. However, you are not required to handle every asset at once. Instead, you may digitally attach Smart Tags to assets as needed.

***Note:*** *You can also digitally attach Smart Tags to assets using KEYper GO. However, this process differs slightly. For more information, see* ***Digitally attach Smart Tags to assets with KEYper GO***.

To digitally attach Smart Tags to assets with KEYper GO Web, do the following:

1. Log in to KEYper GO Web.
2. Search for an imported asset.

   You can do this by entering the asset name/stock number in the search bar, as shown in ***Fig. 86***.
3. From the search results, click the asset name/stock number for the asset you wish to access.

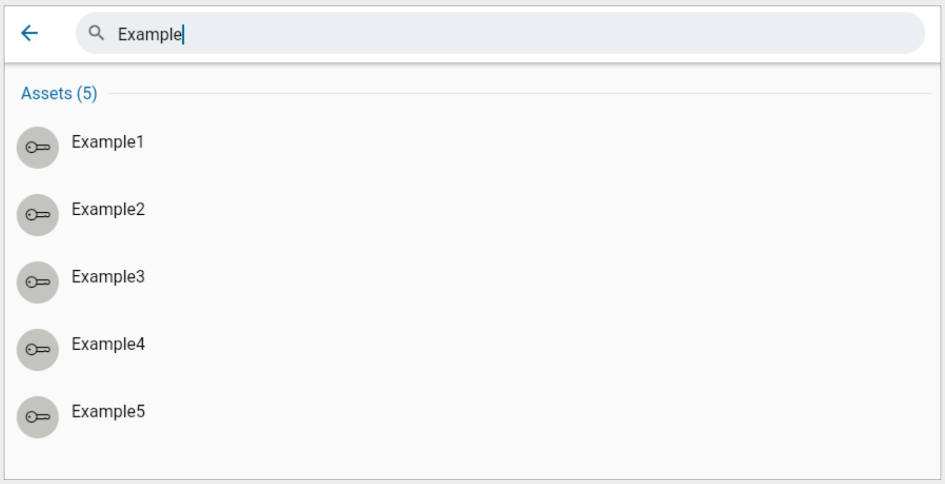


*Fig. 86 – Search for an imported asset*

4. On the Asset details screen, click the **quick action menu** ⋮ , shown in ***Fig. 87***, and select **Attach Fob**.

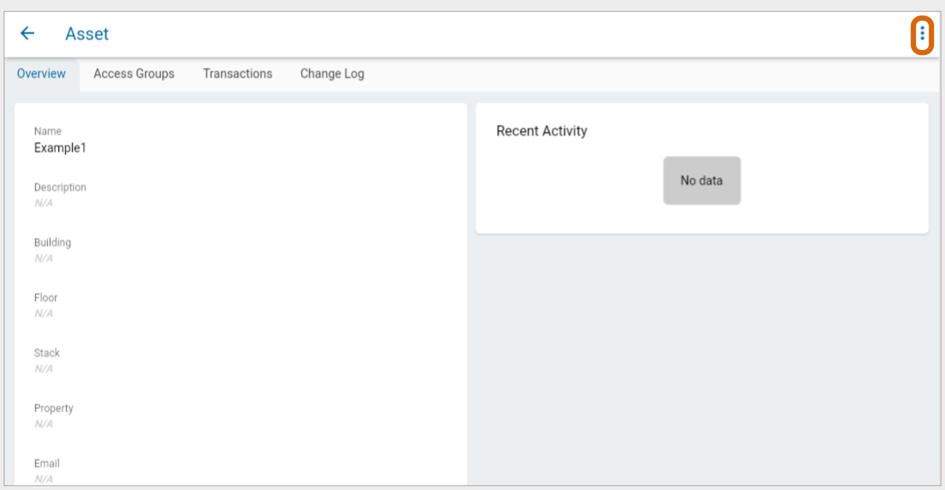


*Fig. 87 – Asset details screen with quick action menu indicated*

5. On the screen that appears, search for the tag number for the Smart Tag that you wish to digitally attach to the asset, as shown in ***Fig. 88*** and ***Fig. 89***.
6. Click the correct tag number from the search results.
7. On the window that appears, click **Yes** to confirm you wish to digitally attach the fob to the Smart Tag.


*Fig. 88 – Smart Tag with tag number indicated*

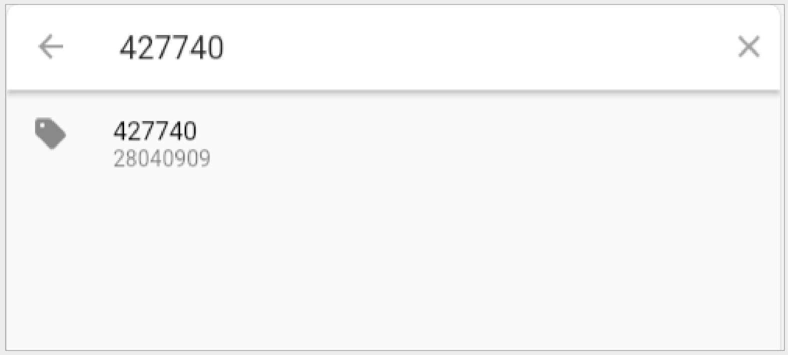


*Fig. 89 – Search for the tag number*

You will be brought to the Asset details screen with the digitally attached fob serial number (**Fob Number**) and tag number (**Tag**) listed. See ***Fig. 90***.

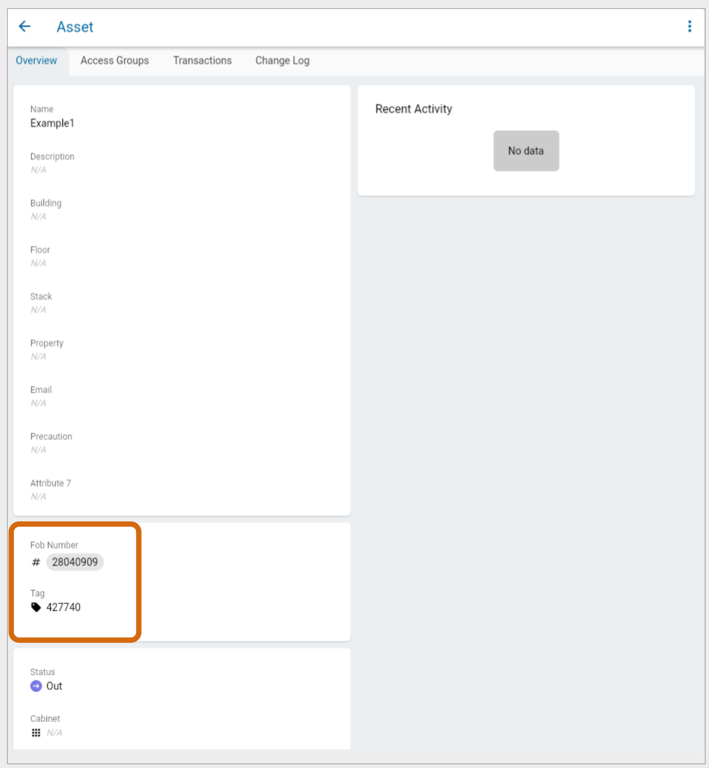


*Fig. 90 – Asset details screen with attached Smart Tag and fob information indicated*

8. On the Asset details screen, click the **quick action menu** ⋮, then select **Edit**.
9. In the **Asset Details** area of the **Edit Asset** screen, toggle on the **Registered** field, shown in ***Fig. 91***.
10. Click **Save**.

    You will be brought to the Asset details screen when you have successfully registered the asset.

11. Physically attach the key to the fob as described in the Kiosk guide in the [**Electronic System Manual**].
12. Check in the asset using the kiosk application.

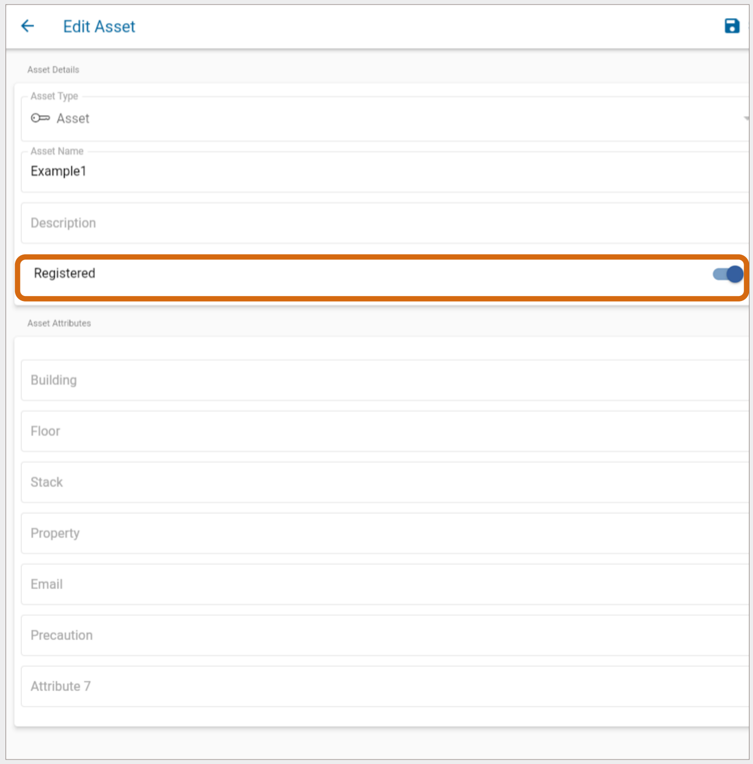


*Fig. 91 – Edit Asset screen with Registered toggle indicated*

## 2. Add reservations

You may reserve an asset so that it will be available to check out at a scheduled date and time. For information on picking up reserved assets, see the Kiosk guide in the Electronic System Manual. To add an asset reservation, do the following:

1. Log in to KEYper GO Web or KEYper GO.
2. Select **Add** ⊕ , then select **Add Reservations** as shown in *Fig. 92*.
   - In KEYper GO, the **Add** button is available from the **Quick Actions** area of the **Home** screen or from the upper right area of the **Assets**, **Equipment**, and **Locate** screens. See *Fig. 27* and *Fig. 28*.
   - In KEYper GO Web, the **Add** button is in the upper right area of the screen, as shown in *Fig. 29*.

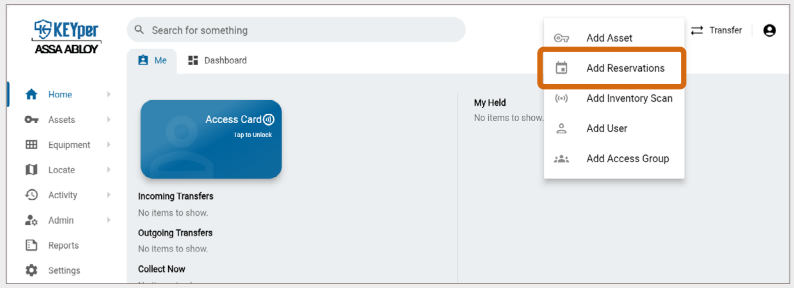


*Fig. 92 – Add menu with Add Reservations indicated (KEYper GO Web)*

3. On the **Create Reservation** screen, shown in *Fig. 93*, select the user who will pick up the reserved asset.
   - When a user is selected, a list of available assets to reserve is displayed. This list is determined by the settings in the access group(s) to which the user belongs.
4. Select the asset(s) you wish to reserve from the list.
   - To add multiple assets, begin typing to display the list after the first asset is added.

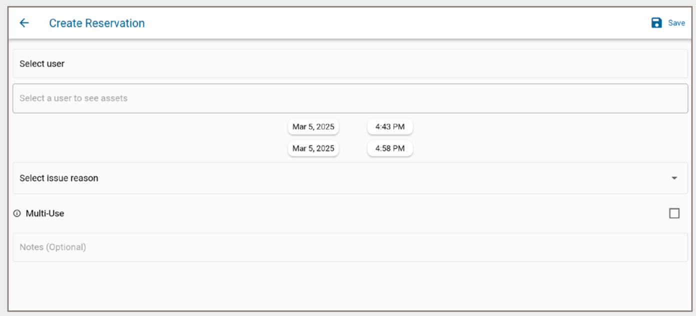


*Fig. 93 – Create Reservation screen*

5. Select the reservation's start date and end date.
6. Select the reservation's start time and end time.
   - If your system has **Reservation Blocking** enabled, then you are prohibited from creating overlapping reservations.
     - *For example, if Reservation A is for 8:00 AM - 8:30 AM, a new reservation cannot be made for 7:45 AM - 8:15 AM or 8:30 AM - 9:00 AM for the same asset. The earliest time the next reservation can be scheduled is at 8:31 AM.*
7. Select the reason you wish to reserve the asset(s) from the **Select issue reason** dropdown menu.
   - Issue Reasons may be configured within the classic Web Admin. See the Electronic System Manual for more information.
8. Check the box for **Multi-Use** to allow the asset to be checked in and out of the system multiple times during the reservation window. If left unchecked, the reservation is considered ended when the asset is checked back into the cabinet, regardless of whether time remains in the reservation window.
9. Provide any notes about the asset reservation (optional).
10. Select **Save**.
    - The **Create Reservation** screen closes and a success message is displayed.
    - Reservations can be seen in the **Reservations** tab of the **Assets** screen.

## 3. Add inventory scan

With KEYper GO's advanced scan technology and asset labeling, you can quickly and accurately conduct inventory sessions across your lot. The system offers multiple scanning options using either your mobile device's camera or an external Bluetooth scanner to streamline asset identification and improve overall inventory accuracy. Whether you are scanning your entire inventory or focusing on a specific group such as your pre-owned vehicles, simply scan each asset label to efficiently locate and verify assets.

***Note**: It is possible to create an inventory scan session in KEYper GO and KEYper GO Web. However, to begin the session, you must use KEYper GO.*

To add an inventory scan session, do the following:

1. Log in to KEYper Go or KEYper GO Web.
2. Select **Add** ⊕ .
   - In KEYper GO, the **Add** button is in the **Quick Actions** area of the **Home** screen or in the upper right area of the **Assets**, **Equipment**, or **Locate** screens. See *Fig. 27* and *Fig. 28*.
   - In KEYper GO Web, the **Add** button is in the upper right area of the screen, as shown in *Fig. 29*.

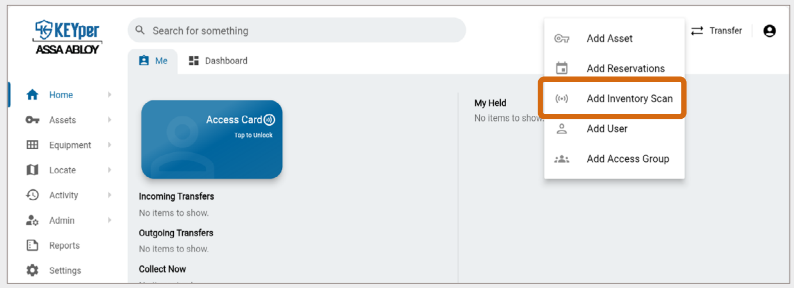


*Fig. 94 – Add menu with Add Inventory Scan indicated (KEYper GO Web)*

3. Select **Add Inventory Scan** from the list of options, as shown in *Fig. 94*.

4. On the **Create Inventory Scan** screen, complete the following fields:
   - **Name**: Enter a name for the inventory scan. For example, "Weekly Inventory Scan 12/16."
   - **Notes**: Provide any notes you wish to include.
   - **Systems**: Select the checkbox for each system you wish to include.

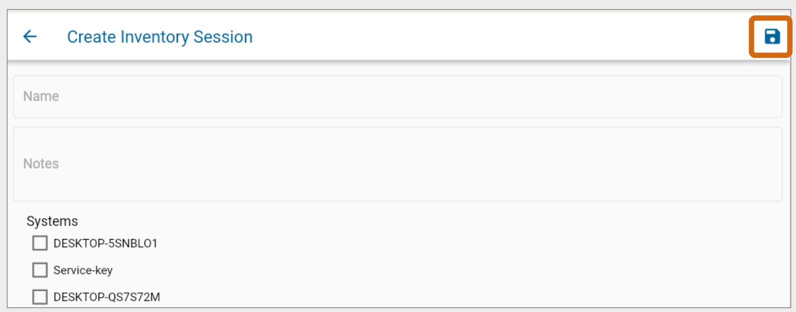


*Fig. 95 – Create Inventory Scan screen*

5. Select **Save** to save the session, shown in *Fig. 95*.
   - You are taken to the **Scan** screen, which displays the information you entered along with additional details, such as the date the inventory scan session was created, the date it ended, the session's status, and a list of assets to be scanned.
   - If you created the inventory scan session from KEYper GO Web, a notification will appear at the top of the screen prompting you to use KEYper GO to begin scanning assets, as shown in *Fig. 96*.

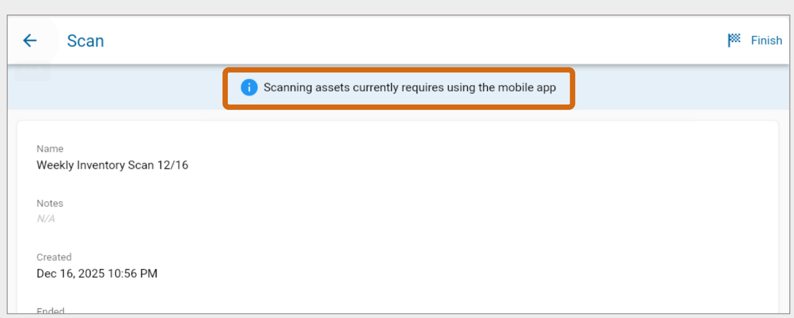


*Fig. 96 – Create Inventory Scan screen with notification indicated (KEYper GO Web)*

### 3.1 *Complete an inventory scan session*

Once the inventory scan session has been created, you are brought to the **Scan** screen to begin scanning. If you have navigated away from the **Scan** screen and need to return to it, you can do so by navigating to the **SCAN Audit tab** on the **Locate** screen, and selecting the inventory scan session from the list.

Once you have reached the **Scan** screen for the desired inventory scan session, do the following:

1. Tap **Start** to open the camera, as shown in ***Fig. 97***.
   - Alternatively, you may select **Bluetooth** to connect your bluetooth scanner.
2. Scan the asset labels affixed to each vehicle using either your device's camera or the connected Bluetooth scanner.
   - When an asset is successfully scanned, a confirmation notification will appear.
   - If you scan the same asset twice, you will receive a notification indicating that it has already been scanned.
   - If you scan an asset that is not a part of the scan session, such as an asset from another system, you will a receive notification that the inventory scan was invalid.
3. On the notification that appears, select **Scan Another** to continue your scan session.
4. Repeat Step 2 and Step 3 until all the vehicles have been scanned.
5. When you are finished, select the **back arrow** to return to the **Scan** screen with your progress saved.

***Note****: It is not necessary to complete the entire inventory scan session at once. You may use the* ***back arrow*** *to return to the* ***Scan*** *screen at any time during the scan session. Your progress will be saved and viewable from the* ***SCAN Audit tab*** *on the* ***Locate*** *screen.*

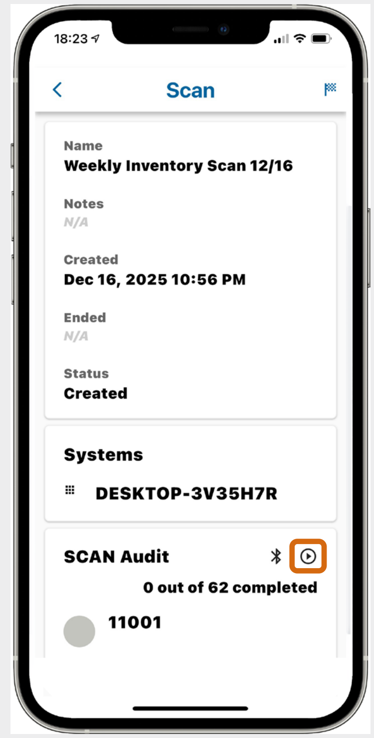


*Fig. 97 – Scan screen with Start button indicated (KEYper GO)*

6. Once every asset has been accounted for, as indicated by the green status bubbles, finish the inventory scan session by tapping the **Flag** .
7. On the **Finish Inventory Session** window, select **Yes** to confirm you wish to complete the session.

The inventory scan session's status updates to **Finished**, shown in *Fig. 98*.

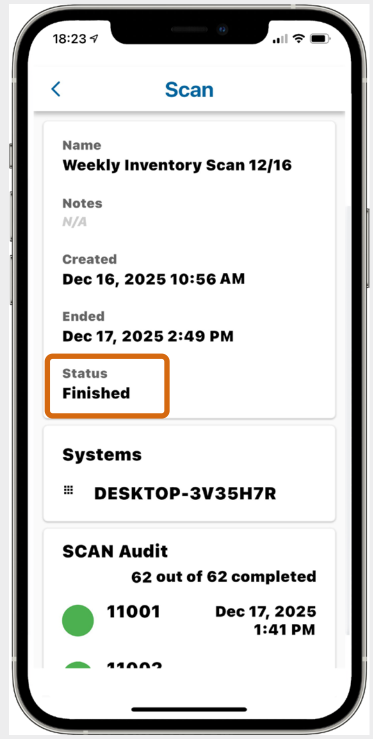


*Fig. 98 – Finished inventory scan session (KEYper GO)*

# 4. Add user

***GDPR Statement (for European markets only):*** *All organisations using KEYper products supported by Traka should be mindful of their obligations under GDPR (General Data Protection Regulations) in the UK and the EU, and any similar legislation in other jurisdictions that relate to personal data. The organisation should have determined its lawful basis for holding and using personal data, including a separate determination for any "special" categories of data. Where data is used on the basis of "consent," this consent must be given freely (i.e., there is a genuine alternative), must be recorded, and must be capable of being withdrawn. Data backups should be stored securely for as long as necessary (but no longer), and then destroyed securely. Any hardware containing personal data (E.g., KEYper cabinets and lockers or servers holding user databases) should have the data securely destroyed once the data is no longer needed in that hardware.*

***Note:*** *When setting up a new system, it is recommended that you add just essential system administrators, also known as admins, then decide on the need for additional access groups. Creating additional groups (Sales, Vendors, etc.) enables easier access group assignment when adding users. There is no need to create an access group for essential system administrators as they are not restricted in any way.*

## *4.1 Admin vs. user – know the difference*

**Admins**

- By default, can access KEYper GO, KEYper GO Web, and the Web Admin
- Override all access group restrictions
- Have access to the admin functions of the kiosk, KEYper GO and KEYper GO Web, and the Web Admin

**Users**

- By default, cannot access the Web Admin, but an admin can grant any user such access with permissions
- Adhere to assigned access group restrictions
- Can only check in, check out, and identify keys at the kiosk

### *4.1.1 User roles*

User access permissions are further split into **None**, **Limited**, and **Full**:

- **None**: These users may only check assets in or out at the kiosk. They have no permissions within KEYper GO Web, KEYper GO, or the Web Admin.
- **Limited**: These users may view and transfer assets, view and create quick reservations, and view scan sessions within KEYper GO Web, KEYper GO, and/or the Web Admin.
- **Full**: These users may additionally edit assets, reservations, and scan sessions.

## *4.2 Add user*

Only admins may create new users. To add a new user, do the following:

1. Log in to KEYper GO Web or KEYper GO.
2. Select **Add**, then select **Add User**, as shown in *Fig. 99*.
   - In KEYper GO, the **Add** button is in the **Quick Actions** area of the **Home** screen or in the upper right area of the **Assets**, **Equipment**, or **Locate** screens. See *Fig. 27* and *Fig. 28*.
   - In KEYper GO Web, the **Add** button is in the upper right area of the screen, as shown in *Fig. 29*.

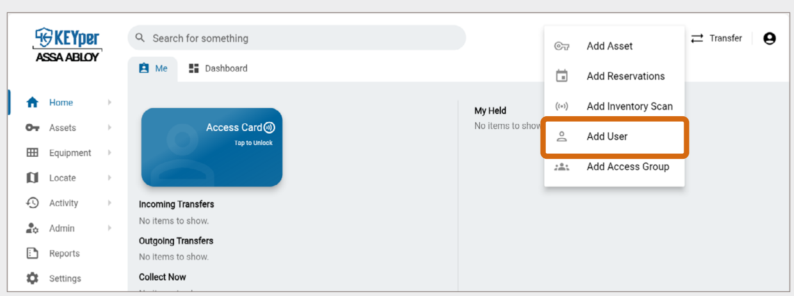


*Fig. 99 – Home screen with Add User indicated (KEYper GO Web)*

3. On the **Create User** screen, fill in the **User Information**, as shown in ***Fig. 100***:

   - **First Name**
   - **Last Name**
   - **Description**
     - A description of the user (e.g., position or title).
   - **Email**
     - The email address used to log in to KEYper GO and KEYper GO Web.
     - This field is required if you wish to have the user receive email notifications.
   - **New Password/Confirm Password**
     - Must contain a minimum of seven alphanumeric characters with at least one special character.
     - Used for logging into KEYper GO/KEYper GO Web and the Web Admin.
     - Can be the same as other users' passwords.
   - **PIN/Confirm PIN**
     - Must contain a minimum of four numeric digits.
     - Only required if the user requires cabinet access, as the PIN is used to log in at the kiosk cabinet.
     - Must be unique from other users' PINs.
   - **Preferred Locale**
     - Select the user's preferred language. This ensures the kiosk software is automatically set to the user's preferred language when they log in at the cabinet.
   - **Phone Number**
     - For SMS notifications.
     - SMS notifications are only supported in the US (+1), Canada ( +1), and Mexico (+52).
   - **Time Zone**
     - Ensure you enter the time zone where the user is located, not that of the admin inputting the user's information, if they differ.


*Fig. 100 – Create User screen – User Information*

4. Set the **User Permissions**, as shown in ***Fig. 101***:

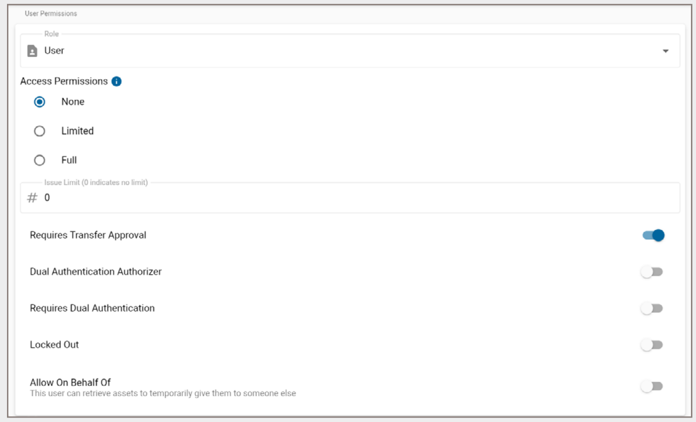


*Fig. 101 – Create User screen – User Permissions*

**Role**

- Set to **Admin** or **User**. See Admin vs. user – know the difference.

**Access Permissions**

- **None**: These users may only check assets in/out at the kiosk. They have no permissions within KEYper GO, KEYper GO Web, or the Web Admin
- **Limited**: These users may additionally view/transfer assets, view/create quick reservations, and view scan sessions within the KEYper GO.
- **Full**: These users may additionally edit assets, reservations, and scan sessions within KEYper GO, KEYper GO Web, or the Web Admin.

**Issue Limit**

- The number of keys this user may have checked out of the key system at any given time. Zero indicates no limit.

**Requires Transfer Approval**

- If toggled on, the user is required to have admin approval before transferring a key. By default, **Requires Transfer Approval** is toggled on.

**Locked Out**

- If toggled on, the user has been locked out after too many failed login attempts. An admin must restore access by toggling the switch off.

**Allow On Behalf Of**

- Toggle on to allow a user to check out an asset and then hand it over to another party without formally transferring it into their possession. One such use case may be a one-time, temporary handover of a key to a third party contractor who is not set up as a user in the system. If using this feature, the user who checked out the asset is ultimately responsible for it.

5. Configure the **User Settings**, as shown in ***Fig. 102***:

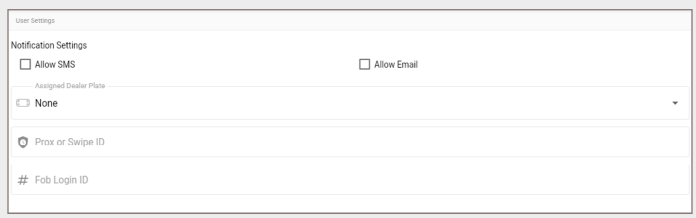


*Fig. 102 – Create User screen – User Settings*

**Notification Settings**

- Check to allow notifications regarding reservations and alerts (admins only) via SMS text message, email, or both.
- SMS notifications are only supported in the US (+1), Canada ( +1), and Mexico (+52).

**Assigned Dealer Plate**

- If a user is assigned a specific dealer plate, select it from the dropdown menu.

**Prox or Swipe ID**

- For systems incorporating a proximity card reader. If the number is known, it may be entered at the time the user is added to the system. This field is auto-filled when the user's card is read during device enrollment. See the Kiosk guide in the Electronic System Manual.

**Fob Login ID**

- Use this field to scan a fob that the user can log in to the kiosk application with. See the Kiosk guide in the Electronic System Manual.

6. Select **Save**.
    - You are redirected to the **Access Groups** tab as shown in ***Fig. 103***.
7. Select the access groups to which the user belongs.
    - The user is automatically assigned to the default access group. Uncheck the box if that does not apply.
    - Admins are automatically made members of all access groups and thus have no restrictions on the assets they may check out.

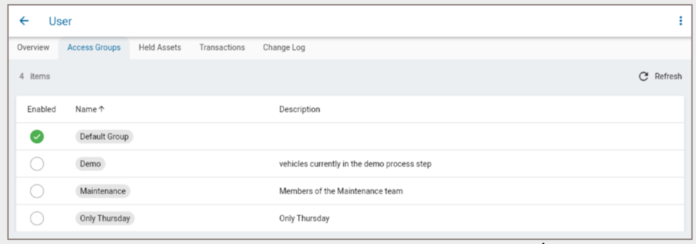

*Fig. 103 – User screen – Access Groups tab*

***Note:*** *Creating access groups before entering users is helpful. Otherwise, for access groups created after users have been entered into the system, a user's access group membership must be edited through the user's profile or by editing the user list for individual access groups. For more information on access groups, see the* ***Electronic System Manual***.

8. Select the **back arrow** to return to the **Users** tab of the **Admin** screen with your changes saved.

***Note****: It is possible to add multiple users at once by importing a user list. For more information, see* ***Import users***.

## 5. Add access group

Access groups allow admins in your organization to set parameters surrounding groups of users' permissions and access. Admins may enable or disable members of the group and customize access times, set which assets group members may check in and out, and set which cabinets group members have permission to use. Common access groups align with the departments within a business, such as Service, Maintenance, and Sales, but it is not necessary to set them up in this way. Access groups are especially useful when used in tandem with the **Process Steps** feature. To learn more about the **Process Steps** feature and access groups, see the **Electronic System Manual**.

It is recommended that you create access groups that suit your business before you begin to import assets and users into your database.

To create a new access group, do the following:

1. Log in to KEYper GO Web or KEYper GO.
2. Select **Add** ⊕ , then select **Add Access Group**, as shown in *Fig. 104*.
   - In KEYper GO, the **Add** button is in the **Quick Actions** area of the **Home** screen or in the upper right area of the **Assets**, **Equipment**, or **Locate** screens. See *Fig. 27* and *Fig. 28*.
   - In KEYper GO Web, the **Add** button is in the upper right area of the screen, as shown in *Fig. 29*.

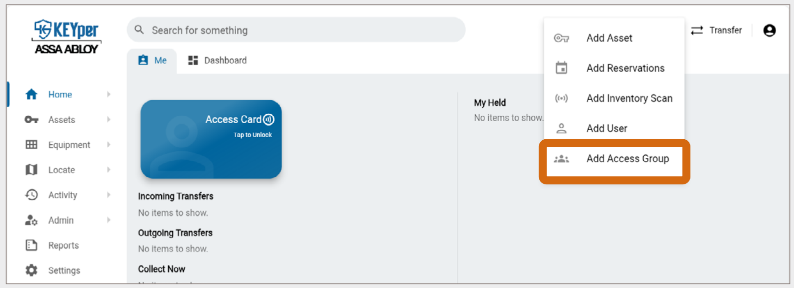

*Fig. 104 – Home screen with Add Access Group indicated (KEYper GO Web)*

3. On the **Create Access Group** screen, enter the desired **Name** for the access group (e.g., Managers), as shown in *Fig. 105*.
4. Enter an optional **Description** for the access group (e.g., 3rd Shift Manager Access).
5. Select the **Access Group Type**.
   - The default access group type is Standard, which is used for all access groups not associated with a particular process step.
   - A **Process Step** access group is used to give access to keys only when they are in a particular process step. See the Electronic System Manual for more information.

*Fig. 105 – Create Access Group screen*

6. Set the desired **Issue Limit** for the group.
   - Issue limit is the number of keys each user in the group may have checked out of the system at any given time.
   - If the limit is 10, each user in the group may have up to 10 keys checked out at any given time.
   - Zero indicates there is no specified limit.
7. Set the desired **Out Duration** time limit.
   - The time limit can be set using the **Days**, **Hours**, and **Minutes** fields.
   - Once a key has been checked out past the set time limit, the asset's status changes from **Out** to **Overdue**, and an alert is sent to all recipients on the Out Duration Exceeded alert list.
   - Zero indicates there is no specified limit.
8. Select **Save**.
   - You are returned to the **Overview** tab on the **Access Group** screen which a success message indicates that the group is added into the system and the final settings can be configured, as described in the following sections.

## 5.1 User list

To edit the user list for a selected access group, do the following:

1. Select the **Users** tab, as shown in ***Fig. 106***.
2. Select the **Enabled** bubble beside each user you want to assign to the access group.
3. Navigate away from the tab to automatically save your changes.

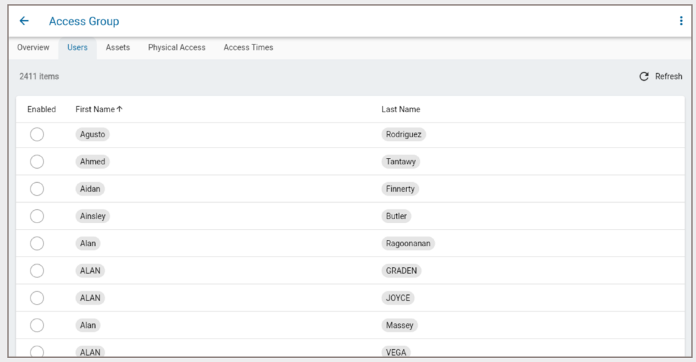


*Fig. 106 – Access Group screen – Users tab*

## 5.2 Asset list

To edit the asset list for a selected access group, do the following:

1. Select the **Assets** tab, as shown in ***Fig. 107***.
2. Select the **Enabled** bubble beside each asset you want to assign to the access group.
3. To commit mass changes, select the box in the column header to Select All or check the box beside all assets that you want to add to or remove from this group.
   - Select **Add** to add new assets to the group.
     - A message appears asking you to confirm that you want to add the selected assets to the access group.
   - Select **Remove** to remove unwanted assets from the group.
     - A message appears asking you to confirm that you want to remove the selected assets from the access group.
4. Navigate away from the tab to automatically save your changes.

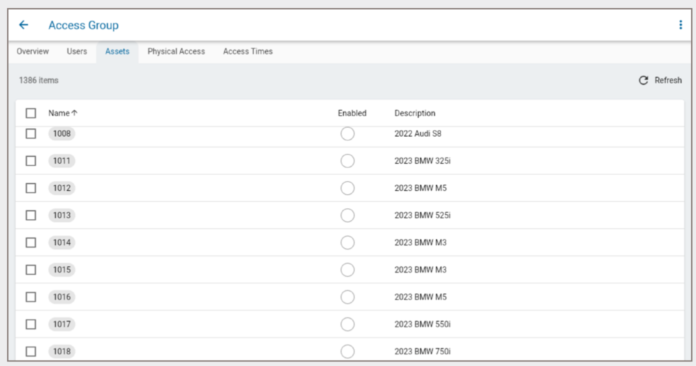


*Fig. 107 – Access Group screen – Assets tab*

### 5.3 *Physical access list*

To edit the physical access list for a selected access group, do the following:

1. Select the **Physical Access** tab, as shown in ***Fig. 108***.
   - The system map displays.
2. Select the check box next to all locations, systems, and cabinets that are to be included in this group.
3. Select **Save** to commit your changes.
   - A success message appears when your changes have been saved.

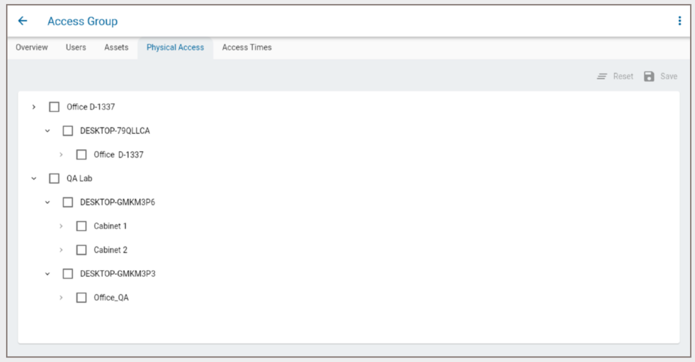


*Fig. 108 – Access Group screen – Physical Access tab*

### 5.4 *Access times*

To edit access times for a selected access group, do the following:

1. Select the **Access Times** tab, as shown in ***Fig. 109***.
2. Select **Add** to open the **Create Access Time** screen.

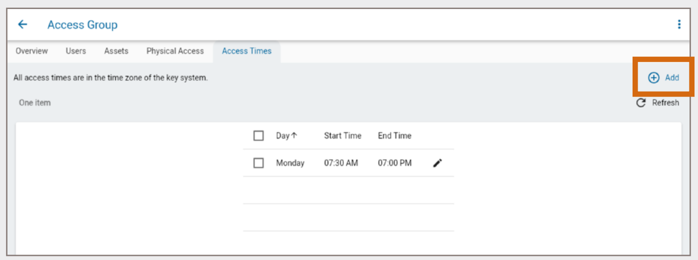


*Fig. 109 – Access Group screen – Access Times tab*

3. Select the desired **Day of Week**, then enter the **Start Time** and **End Time** for the access window, as shown in ***Fig. 110***.
   - You may have multiple access times per day, if desired. For example, if you want to restrict access during lunch hours, you may restrict access to a block of time in the morning and a second block of time in the afternoon.
4. Select **Save**.
5. Follow the same steps for each day of the week during which users in the access group are allowed to access the system.

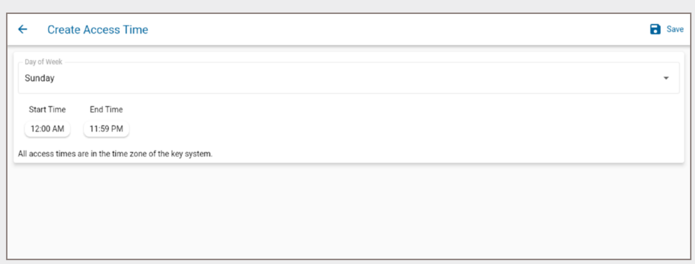


*Fig. 110 – Create Access Time screen*

6. If there are existing access times for a given day, you may select **Edit** to make changes, as shown in ***Fig. 111***.
7. If there are existing access times for a day on which you do not wish to allow access, check the box next to the time you wish to remove, then select **Delete** to remove the entry.
8. Navigate away from the tab to automatically save your changes.

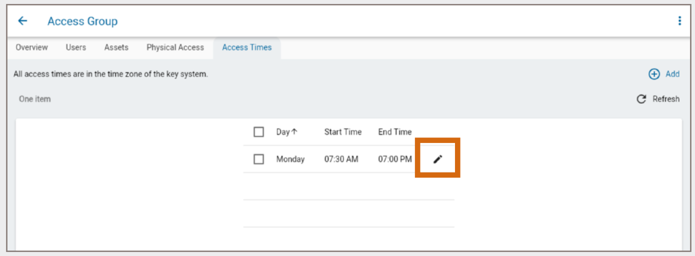

*Fig. 111 – Edit existing access times*

## Transfer

Allow authorized staff to transfer ownership of assets in the field without returning them to the cabinet. In KEYper GO and KEYper GO Web, both users validate the transaction, and the system retains a complete chain-of-custody record to maintain accountability for keys in and out of the cabinet.

There are four methods by which you may transfer an asset from one user to another while maintaining the audit trail without ever returning to the cabinet:

- If you know who has the keys you need, you can **Search for the Current Holder**.
- If you know the asset you need but not who currently has it, you can **Search for the Asset**.
- If you currently hold an asset and want to transfer it to someone else, you can use the **Transfer an asset I'm holding** feature.
- If you want to transfer an asset using the QR code/barcode, you can use the **Transfer an asset using QR code or barcode** feature.

### 1. Search for the Current Holder

To transfer an asset from a user currently holding the asset without returning to the cabinet, do the following:

1. Log in to KEYper GO Web or KEYper GO.
2. Select **Transfer** .
   - In KEYper GO, the **Transfer** button is in the **Quick Actions** area of the **Home** screen or in the upper right area of the **Assets**, **Equipment**, or **Locate** screens. See *Fig. 27* and *Fig. 28*.
   - In KEYper GO Web, the **Transfer** button is in the upper right area of the screen, as shown in *Fig. 112*.

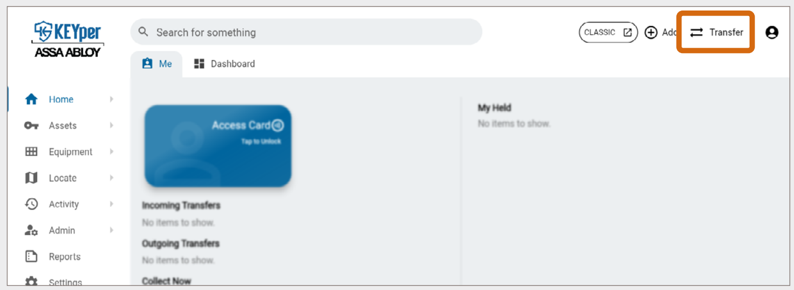


*Fig. 112 – Home screen with Transfer button indicated (KEYper GO Web)*

3. On the **Transfer** screen, if you know the user who currently holds the asset, select **Search for the Current Holder**, as shown in *Fig. 113*.
4. Type the full or partial name of the user and select their name from the displayed list.
   - The asset(s) that the user currently has are displayed in a list.
5. Select the asset you wish to transfer.

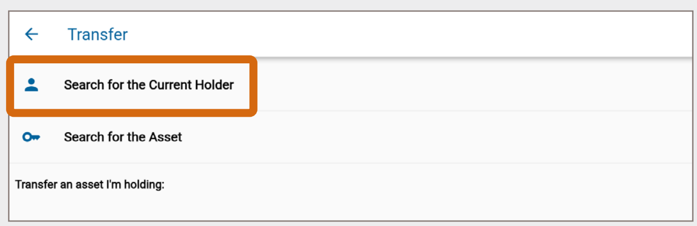


*Fig. 113 – Transfer screen – Search for the Current Holder*

6. If you have permission to transfer on behalf of someone else, you may search for the new user by typing their name in the search bar and select their name from the results, as in Step 4.
   - See **Add user** for further information about user permissions.
7. Alternately, you may choose to transfer ownership of the asset to yourself by selecting **Take Ownership Myself**, as shown in *Fig. 114*.

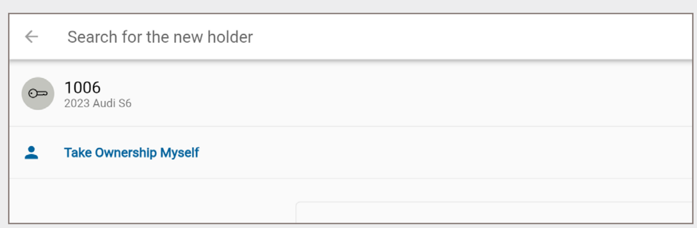


*Fig. 114 – Transfer screen – Search for the new holder*

8. Select a reason for the transfer from the **Reason** dropdown menu, as shown in ***Fig. 115***.
9. Add any comments, if desired (optional).
10. Select **Submit for Approval**.

    The new holder receives an alert to approve the transfer. Upon acceptance, the asset is now in the digital possession of the new holder.

11. Admins may alternately select **Complete Now** to skip the approval step and immediately transfer possession of the asset to the new holder.
12. Ensure the asset is physically handed over to the new holder to maintain the consistency of the audit trail and the location of the asset.

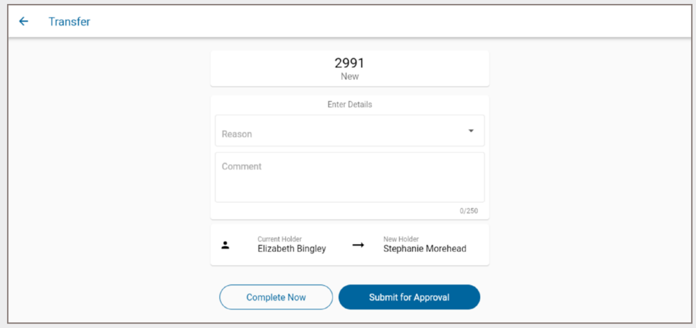

*Fig. 115 – Transfer screen – Fill in transfer details and submit*

## 2. Search for the Asset

To find a specific asset to transfer without returning to the cabinet, do the following:

1. Log in to KEYper GO Web or KEYper GO.
2. Select **Transfer** .
   - In KEYper GO, the **Transfer** button is in the **Quick Actions** area of the **Home** screen or in the upper right area of the **Assets**, **Equipment**, or **Locate** screens. See *Fig. 27* and *Fig. 28*.
   - In KEYper GO Web, the **Transfer** button is in the upper right area of the screen, as shown in *Fig. 116*.

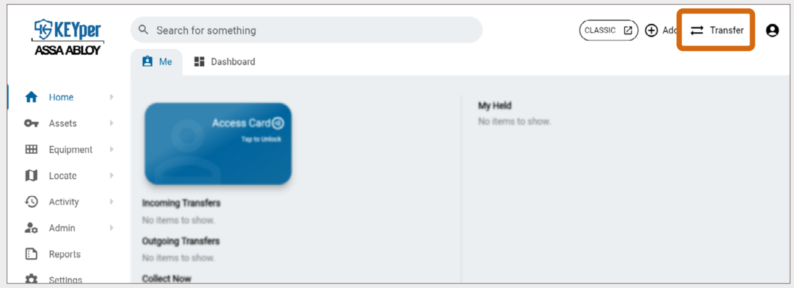


*Fig. 116 – Home Menu with Transfer button indicated (KEYper GO Web)*

3. On the **Transfer** screen, if you know the asset you need but not who currently has it, select **Search for the Asset**, as shown in *Fig. 117*.
4. Type the full or partial name of the asset and select the asset you wish to transfer from the displayed list.

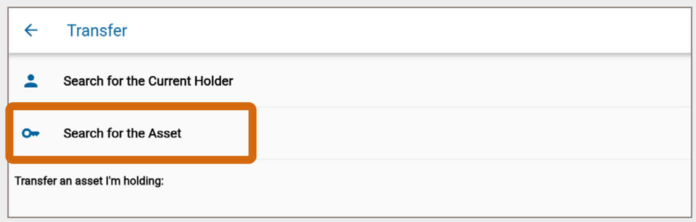


*Fig. 117 – Transfer screen – Search for the Asset*

5. If you have permission to transfer on behalf of someone else, you may search for the new user by typing their name in the search bar and select their name from the results.
   - See **Add user** for further information about user permissions.
6. Alternately, you may choose to transfer ownership of the asset to yourself by selecting **Take Ownership Myself**, as shown in *Fig. 118*.

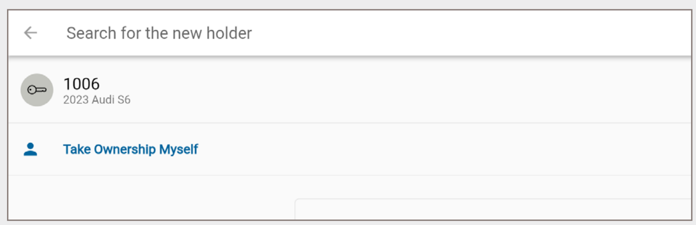


*Fig. 118 – Transfer screen – Search for the new holder*

7. Select a reason for the transfer from the **Reason** dropdown menu, as shown in *Fig. 119*.
8. Add any comments, if desired (optional).
9. Select **Submit for Approval**.
   - The new holder receives an alert to approve the transfer. Upon acceptance, the asset is now in the digital possession of the new holder.
10. Admins may alternately select **Complete Now** to skip the approval step and immediately transfer possession of the asset to the new holder.

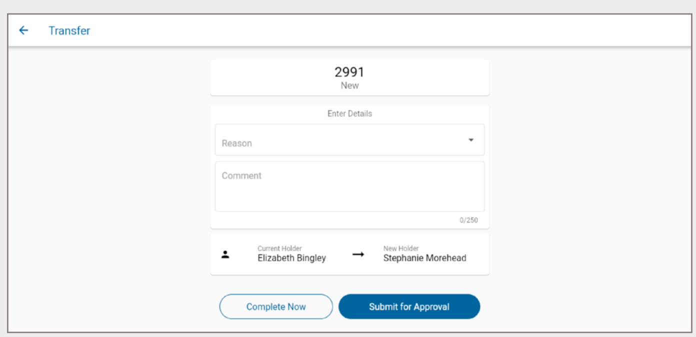


*Fig. 119 – Transfer screen – Fill in transfer details and submit*

11. Ensure the asset is physically handed over to the new holder to maintain the consistency of the audit trail and the location of the asset.

## 3. Transfer an asset I'm holding

To transfer an asset you are currently holding directly to another user, do the following:

1. Log in to KEYper GO Web or KEYper GO.
2. Select **Transfer** .
   - In KEYper GO, the **Transfer** button is in the **Quick Actions** area of the **Home** screen or in the upper right area of the **Assets**, **Equipment**, or **Locate** screens. See *Fig. 27* and *Fig. 28*.
   - In KEYper GO Web, the **Transfer** button is in the upper right area of the screen, as shown in *Fig. 120*.

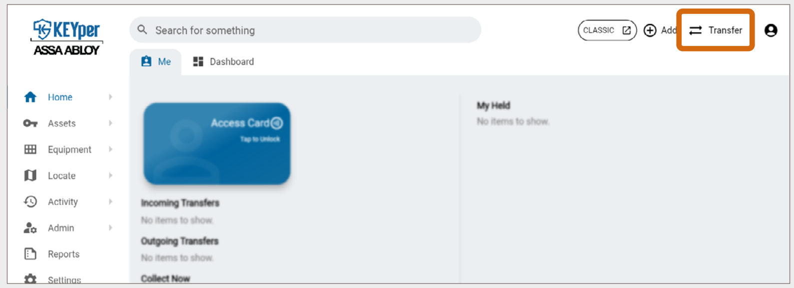


*Fig. 120 – Select Transfer from the navigation menu*

3. On the **Transfer** screen, if you have a key or dealer plate and want to transfer it to another user, select the key or dealer plate from the **Transfer an asset I'm holding** list, as shown in *Fig. 121*.

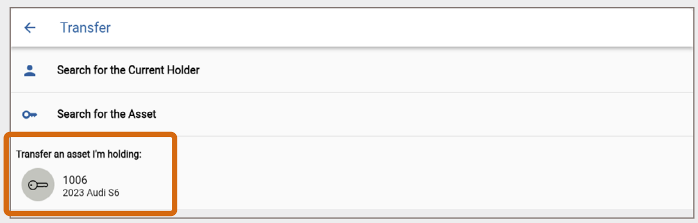


*Fig. 121 – Transfer screen – Transfer an asset I'm holding*

4. Search for the new user by typing their name in the search bar and selecting their name from the results.

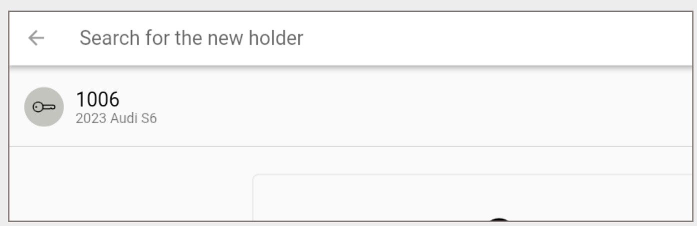


*Fig. 122 – Transfer screen – Search for the new holder*

5. Select a reason for the transfer from the **Reason** dropdown menu, as shown in *Fig. 123*.
6. Add any comments, if desired (optional).
7. Select **Submit for Approval**.
   - The new holder receives an alert to approve the transfer. Upon acceptance, the asset is now in the digital possession of the new holder.
8. Admins may alternately select **Complete Now** to skip the approval step and immediately transfer possession of the asset to the new holder.
9. Ensure the asset is physically handed over to the new holder to maintain the consistency of the audit trail and the location of the asset.

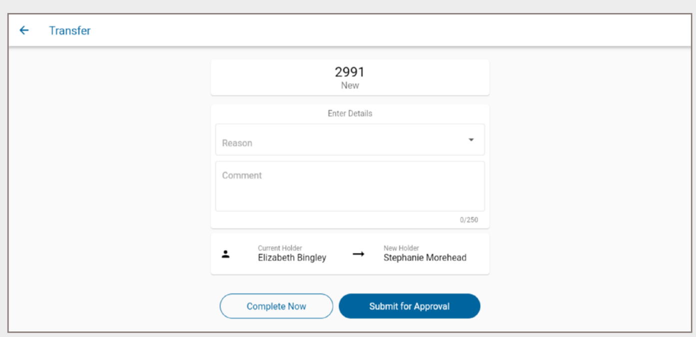


*Fig. 123 – Transfer screen – Fill in transfer details and submit*

## 4. Transfer an asset using QR code or barcode

To transfer an asset using the QR code on its Smart Tag or the barcode on its asset label, do the following:

1. Log in to KEYper GO.
2. Select **Transfer** .

   In KEYper GO, the **Transfer** button is in the **Quick Actions** area of the **Home** screen or in the upper right area of the **Assets**, **Equipment**, or **Locate** screens. See *Fig. 27* and *Fig. 28*.
3. On the **Transfer** screen, select **Scan QR Code**, as shown in *Fig. 124*.

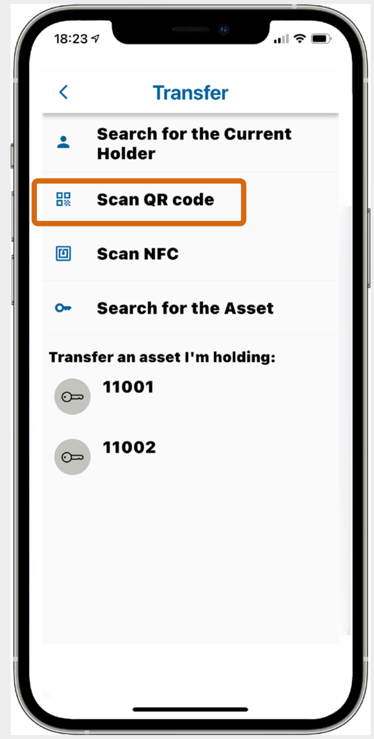


*Fig. 124 – Transfer screen with Scan QR code indicated*

4. Scan the QR code on the Smart Tag or the barcode on the asset label for the asset to be transferred.
5. On the **Assets found for scanned value** notification, tap the asset name, as shown in *Fig. 125*.

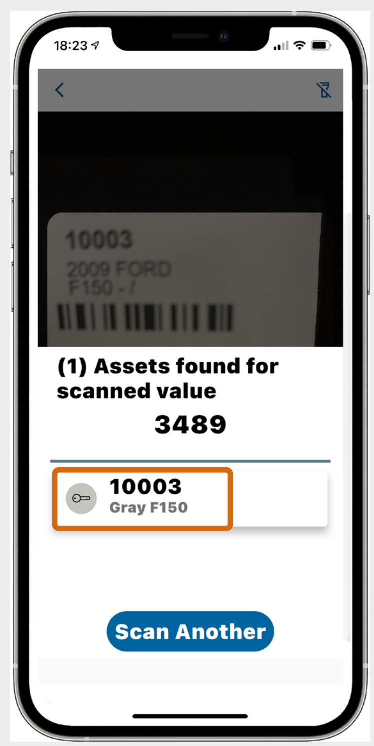


*Fig. 125 – Assets found for scanned value notification with asset name indicated*

6. If you have permission to transfer on behalf of someone else, you may search for the new user by typing their name in the search bar and selecting their name from the results.

   See **Add user** for further information about user permissions.

7. Alternately, you may choose to transfer ownership of the asset to yourself by selecting **Take Ownership Myself**, as shown in *Fig. 126*.

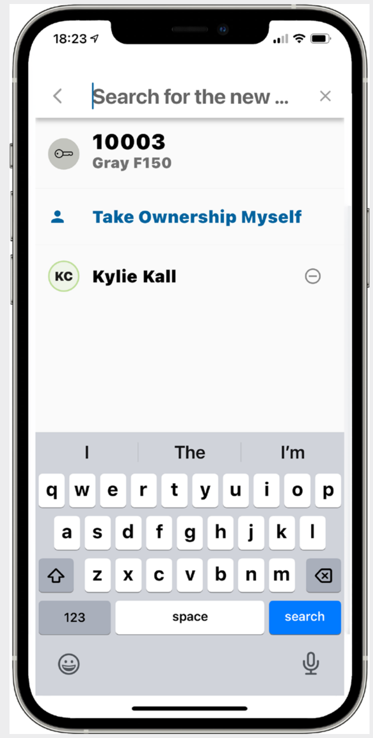


*Fig. 126 – Transfer screen – Search for new holder*

8. Select a reason for the transfer from the **Reason** dropdown menu, as shown in *Fig. 127*.
9. Add any comments, if desired (optional).
10. Select **Submit for Approval**.

    The new holder receives an alert to approve the transfer. Upon acceptance, the asset is now in the digital possession of the new holder.

11. Admins may alternately select **Complete Now** to skip the approval step and immediately transfer possession of the asset to the new holder.
12. Ensure the asset is physically handed over to the new holder to maintain the consistency of the audit trail and the location of the asset.

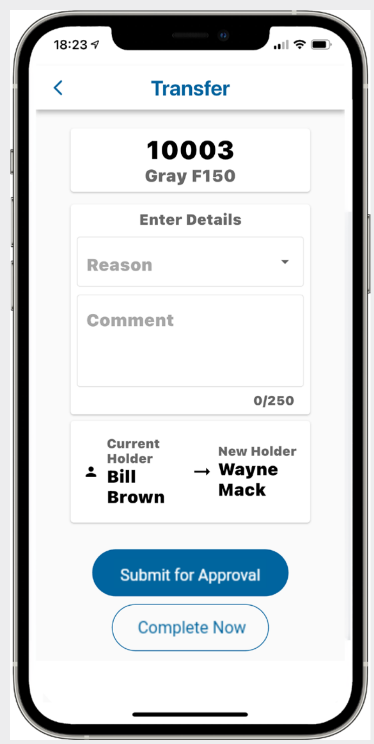


*Fig. 127 – Transfer screen – Fill in transfer details and submit*

# Profile

From the **Profile** menu, accessed by selecting , as shown in ***Fig. 128***, you can change your password, language, and theme. You can also review the user agreements and check the version of the software you are using.

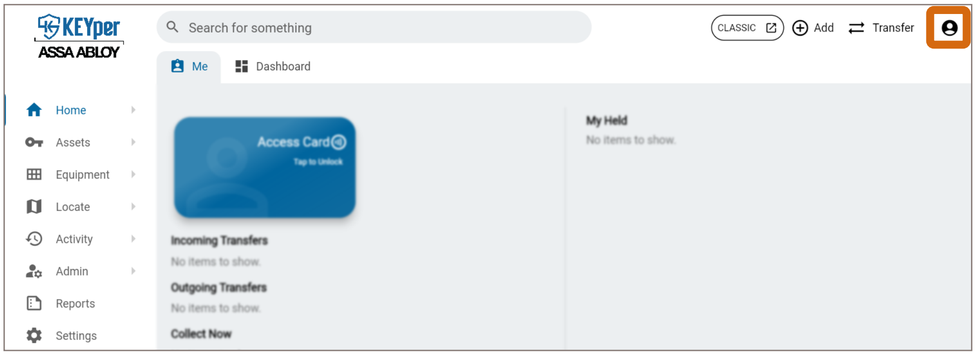


*Fig. 128 – Profile button*

## 1. Change password

Selecting your name opens the **Profile** screen, where you can change your password.

To change your password, do the following:

1. Log in to KEYper GO Web or KEYper GO.
2. Select **Profile** , then select your name, as shown in ***Fig. 129***.

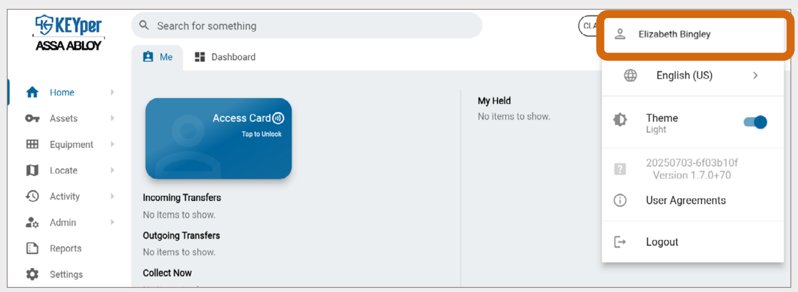


*Fig. 129 – Select your name from the Profile menu*

3. On the **Profile** screen, type your current password in the **Current Password** field, as shown in ***Fig. 130***.
   - Toggle the **show/hide** button to view your entry.
4. Type a **new password** in the **New Password** field.
   - By default, the new password must contain a minimum of seven alphanumeric characters and at least one special character. Contact Support to configure these requirements to suit your needs.
5. Retype the new password in the **Confirm Password** field.
6. Select **Change Password** to save your new password.
7. Select the **back arrow** to return to the previous screen.

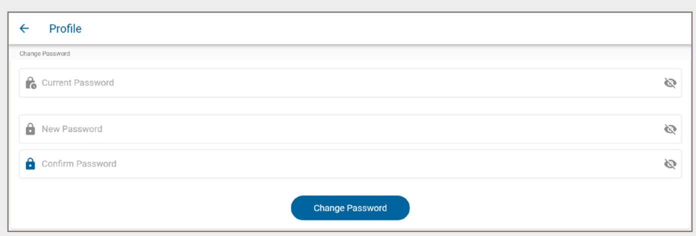


*Fig. 130 – Profile screen – change password*

## 2. Privacy settings

The following sections provide an overview of the privacy settings in KEYper GO and KEYper GO Web that you can adjust from your profile.

### 2.1 *Share Crash Reports*

**Share Crash Reports** may be toggled on and off from the **Profile** screen. If toggled on, KEYper GO will use crash reports to improve the app and fix bugs. Your personal information will not be collected. By default, **Share Crash Reports** is toggled off.

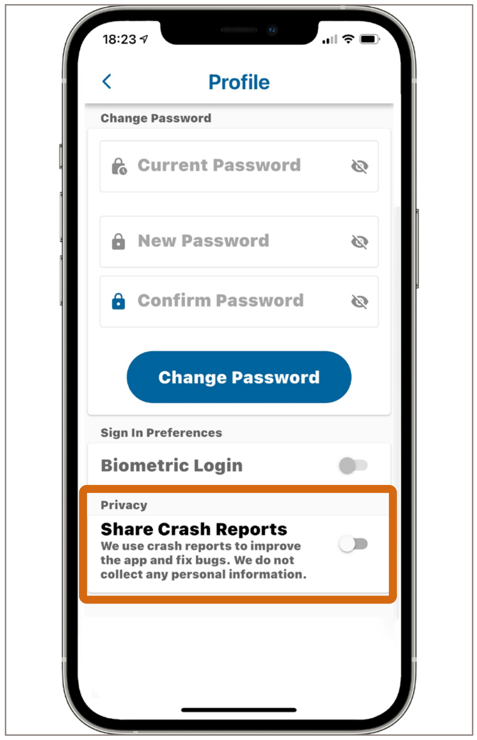


*Fig. 131 – Profile screen with Share Crash Reports option indicated (toggled off)*

## 2.2 Cookie Settings

KEYper GO and KEYper GO Web use cookies to remember your preferences, such as language settings, and to ensure the site/application works properly. You can read the Cookie Notice and set your cookie preferences from the banner on the **Login** screen, as shown in *Fig. 132*. Selecting **Accept All Necessary** allows only essential cookies required for core functionality. Selecting **Accept All** enables all cookies, including optional ones used for personalization, analytics, and performance improvement.

Cookie preferences can also be controlled from your profile, as shown in the following sections.

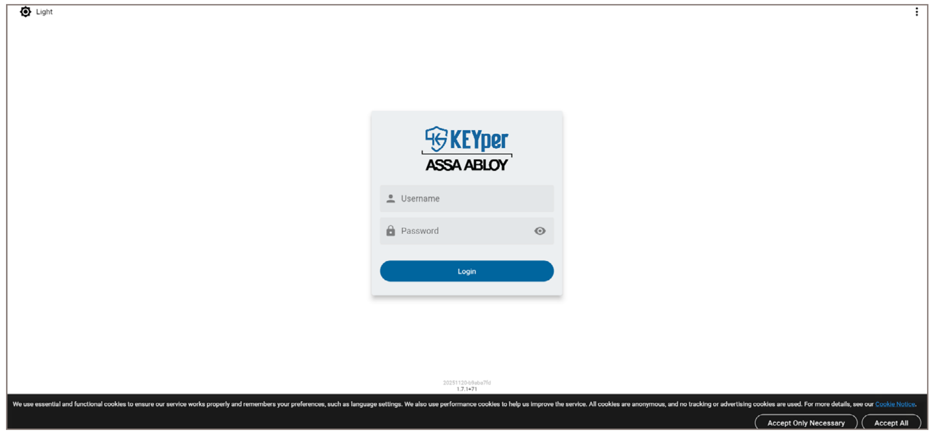


*Fig. 132 – Login screen with cookie banner*

### 2.2.1 Enable optional cookies

To enable optional cookies, do the following:

1. Log in to KEYper GO or KEYper GO Web.
2. Select **Profile** , then select your name.
3. On the **Profile** screen, locate **Cookie Settings** under **Privacy**.
4. Toggle on the **Cookie Settings** option, as shown in *Fig. 133*.

***Note**: Under **Cookie Settings**, there is a link to the **Cookie Notice**. Read this for more information on how cookies are used.*

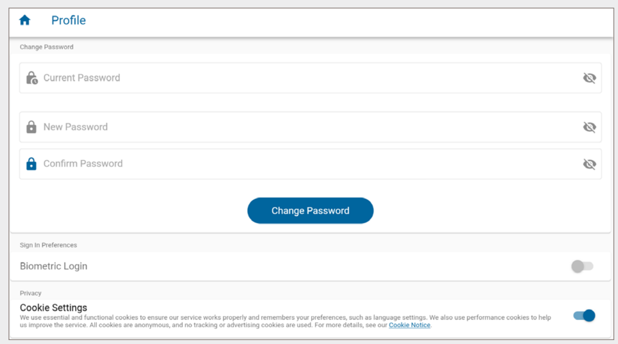


*Fig. 133 – Cookie Settings option toggled on*

### 2.2.2 Disable optional cookies

To disable optional cookies, do the following:

1. Log in to KEYper GO or KEYper GO Web.
2. Select **Profile** , then select your name.
3. On the **Profile** screen, locate **Cookie Settings** under **Privacy**.
4. Toggle off the **Cookie Settings** option, as shown in *Fig. 134*.

***Note**: This toggle turns off optional cookies only. Essential cookies cannot be turned off because they are required for the site/application to function properly. Under **Cookie Settings**, there is a link to the **Cookie Notice**. Read this for more information on how cookies are used.*

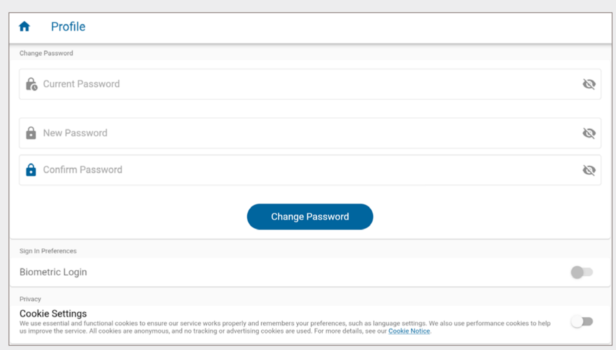


*Fig. 134 – Cookie Settings option toggled off*

## 3. Set language

Your preferred language is set during user registration. This setting determines which language you use to interact with the kiosk application and the Web Admin. Currently, KEYper GO and KEYper GO Web default to English (US), no matter which language is chosen during user registration. You may update this preference within the **Profile** menu.

To change your preferred language for KEYper GO and KEYper GO Web, do the following:

1. Log in to KEYper GO or KEYper GO Web.
2. Select **Profile** , then select the current language, as shown in ***Fig. 135***.

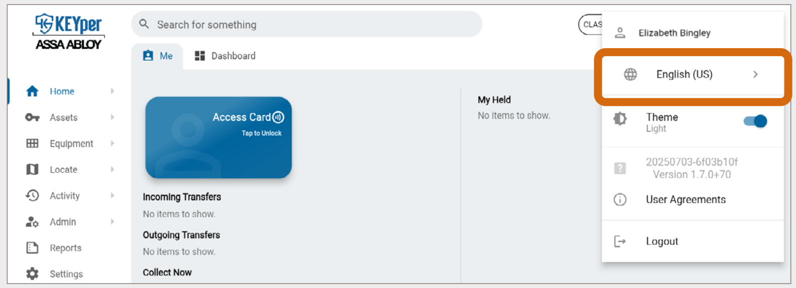


*Fig. 135 – Select the current language from the Profile menu*

3. In the **Select Language** window, select your preferred language from the list, as shown in ***Fig. 136***.

***Note:*** *New language options are continually being added. To request a specific language, contact Support.*

4. If the change is not immediately effective, exit and reopen KEYper GO or reload the page in KEYper GO Web.

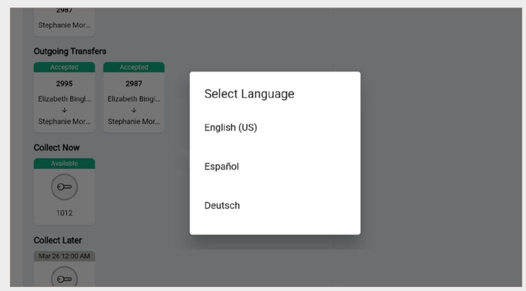


*Fig. 136 – Select your preferred language from the list*

## 4. Set theme

KEYper GO and KEYper GO Web are offered in light theme by default. To change to dark theme, do the following:

1. Log in to KEYper GO or KEYper GO Web.
2. Select **Profile** , then click or tap to toggle the **Theme**, as shown in ***Fig. 137***.
   - If currently in light theme, dark theme is enabled.
   - If currently in dark theme, light theme is enabled.

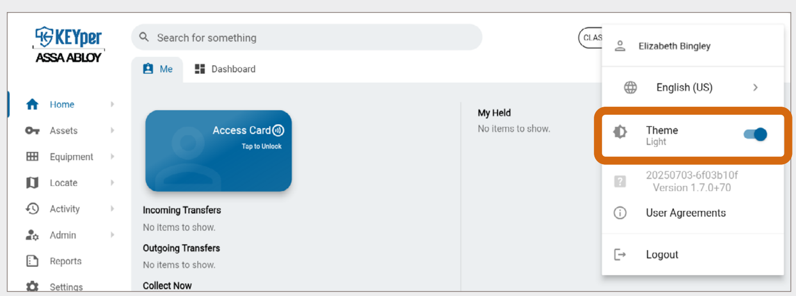


*Fig. 137 – Toggle light and dark theme in the Profile menu*

## 5. Software version

New versions of KEYper GO and KEYper GO Web will become available as updates are made. Occasionally, the Support team may ask you to verify which version of the software you are using. To check the version you are currently running, do the following:

1. Log in to KEYper GO or KEYper GO Web.
2. Select **Profile** .

   The read-only software version is displayed, as shown in ***Fig. 138***.

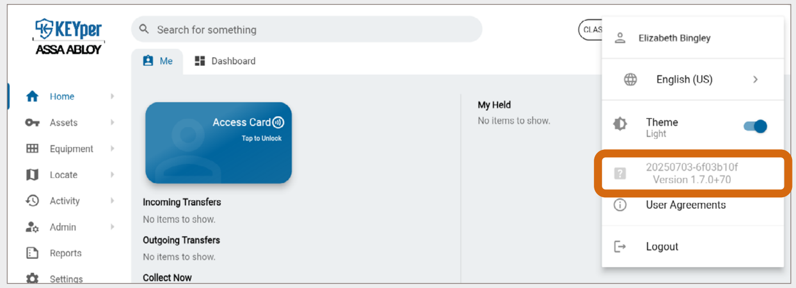


*Fig. 138 – View the current software version in the Profile menu*

## 6. Review user agreements

The first time you connect to KEYper GO or KEYper GO Web, you are prompted to acknowledge a number of user agreements. To review these agreements and refresh your memory on their contents, do the following:

1. Log in to KEYper GO or KEYper GO Web.
2. Select **Profile** , then select **User Agreements**, as shown in ***Fig. 139***.

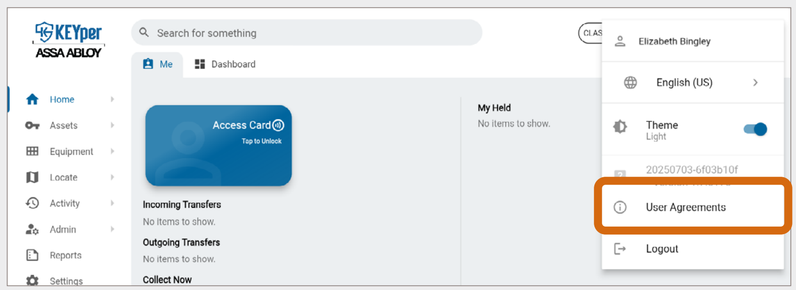


*Fig. 139 – Select User Agreements from the Profile dropdown menu*

3. On the **User Agreements** screen, click or tap to review the **Privacy Policy**, **Terms and Conditions, End User License Agreement,** and **Cookie Notice** tabs, as shown in ***Fig. 140***.

   Use the **zoom in/out** and **scroll up/down** buttons to navigate the document.
4. Select the **back arrow** to return to the previous screen.

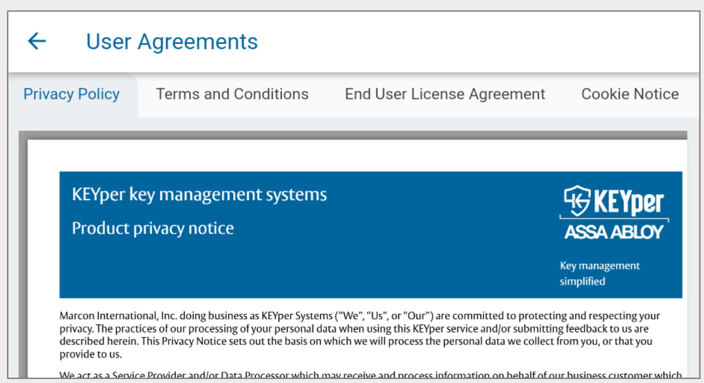


*Fig. 140 – User Agreements screen*

## 7. Logout

You are automatically logged out of KEYper GO Web after a period of inactivity. However, for your and your company's security, it is best practice to log out of KEYper GO and KEYper GO Web at the end of each session. To log out, do the following:

1. Select **Profile**, then select **Logout**, as shown in *Fig. 141*.

   You are returned to the **Login** screen.

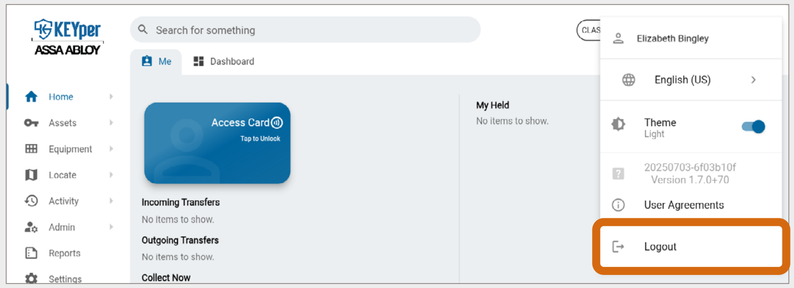


*Fig. 141 – Select Logout from the Profile dropdown menu*

# Home

The **Home** screen of KEYper GO and KEYper GO Web provides an at-a-glance view of the assets you hold, transfer requests, and reservations on the **Me** tab, as well as an overview of the status of your assets and the activity of your users over the last 120 days on the **Dashboard** tab.

## 1. Me tab

In addition to the navigation menus that appear on most screens (see **Navigation**), the **Me** tab of the **Home** screen provides a quick view of information regarding your assets – which ones you have in your possession, which ones are being transferred to or from you, and whether you have any reserved, as shown in ***Fig. 142*** and ***Fig. 143***.


*Fig. 142 – Me tab on the Home screen (KEYper GO)*

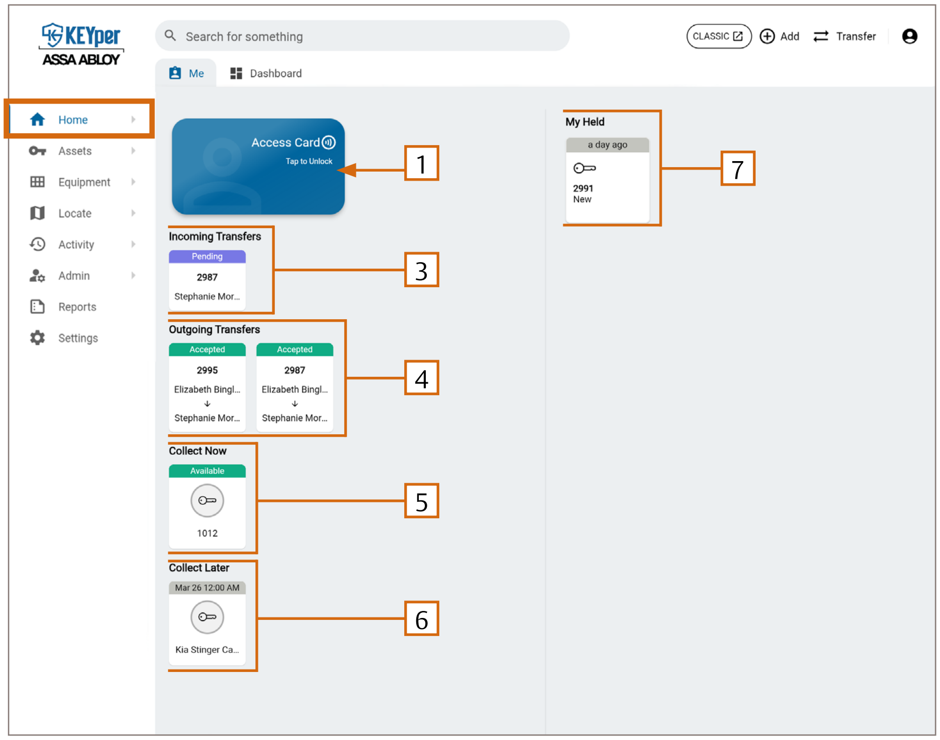


*Fig. 143 – The Me tab on the Home screen (KEYper GO Web)*

The **Me** tab is organized as follows:

1. **Access Card (for KEYper LT customers only)**
2. **Quick Actions**
3. **Incoming Transfers**
4. **Outgoing Transfers**
5. **Collect Now**
6. **Collect Later**
7. **My Held**

***Note:*** *If you do not see these areas in KEYper GO, try swiping to scroll down the* ***Me*** *tab.*

### *1.1 Access Card (for KEYper LT customers only)*

The Access Card is used in KEYper GO to unlock a KEYper LT cabinet, our semi-electronic key storage solution. The Access Card is only visible for customers who have at least one KEYper LT cabinet in their system. Access Card functionality is not currently supported for KEYper GO Web. Selecting the Access Card displays a message to this effect. For further information regarding the KEYper LT cabinet, contact Sales.

### 1.2 *Incoming Transfers*

Incoming transfers are assets that another user holds and wants to transfer to your possession. Unless an admin performs an immediate transfer, you must accept a transfer request for the asset to officially move into your digital possession. This is required to maintain an accurate chain-of-custody record for the asset. Incoming transfers are useful when another user has a key or dealer plate that you need to use but you don't want to have to return to the cabinet to do it. They hand you the asset and then perform the transfer within KEYper GO or KEYper GO Web. See **Transfer** for further information.

Details about incoming transfers include the following:

- The top bar shows the status of the transfer request: Pending, Accepted, or Declined, as shown in ***Fig. 144***.
- The line in bold is the name of the asset to be transferred.
- The **name** is the requester of the transfer, which is either the current holder of the asset or an admin.

***Note:*** *Admins may request a transfer on behalf of any user. Full or Limited users may only request transfers on their own behalf. See* **Add user** *for further information about user roles and their permissions.*

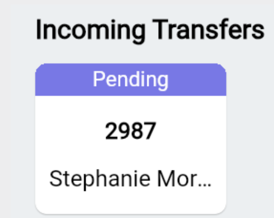


*Fig. 144 – Incoming transfers card*

1. Select the **transfer card** to open the **Review Transfer** screen and view the details.
2. If the transfer is pending, select to **Accept** or **Decline** the transfer, as shown in ***Fig. 145***.
3. Select the **back arrow** to return to the **Home** screen.

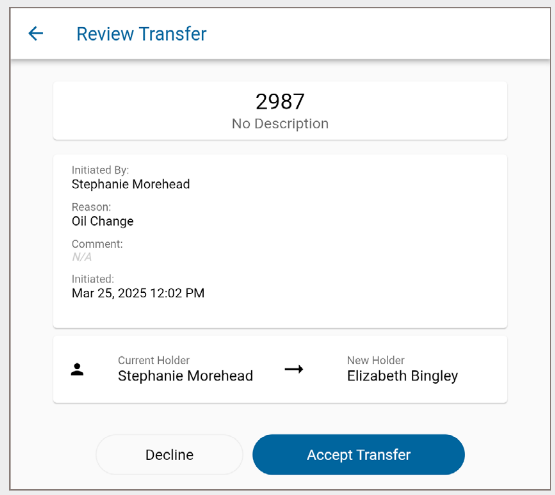


*Fig. 145 – Review Transfer screen – incoming transfer*

### 1.3 *Outgoing Transfers*

Outgoing transfers are assets that you currently hold and want to transfer to another user. Unless an admin performs an immediate transfer, the receiver must accept the transfer request for the asset to officially move into their digital possession. This is required to maintain an accurate chain-of-custody record for the asset. Outgoing transfers are useful when you have a key or dealer plate that another user needs to use but you don't want to have to return to the cabinet to do it. They hand you the asset and then perform the transfer within KEYper GO or KEYper GO Web. See **Transfer** for further information.

Details about incoming transfers include the following:

- The top bar shows the status of the transfer request: Pending, Accepted, or Declined, as shown in ***Fig. 146***.
- The line in bold is the name of the asset to be transferred.
- The first name is the requester of the transfer, which is either the current holder of the asset (you) or an admin.

***Note:*** *Admins may request a transfer on behalf of any user. Full or Limited users may only request transfers on their own behalf. See* ***Add user*** *for further information about user roles and their permissions.*

- The second name is the receiver of the transfer, or the person to whom you are handing the key or dealer plate.

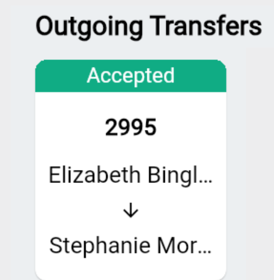


*Fig. 146 – Outgoing transfers card*

1. Select the **transfer card** to open the **Review Transfer** screen and view the details.
   - The status of the transfer is displayed at the top of the screen, as shown in ***Fig. 147***.
2. Select **Close** to return to the **Home** screen.

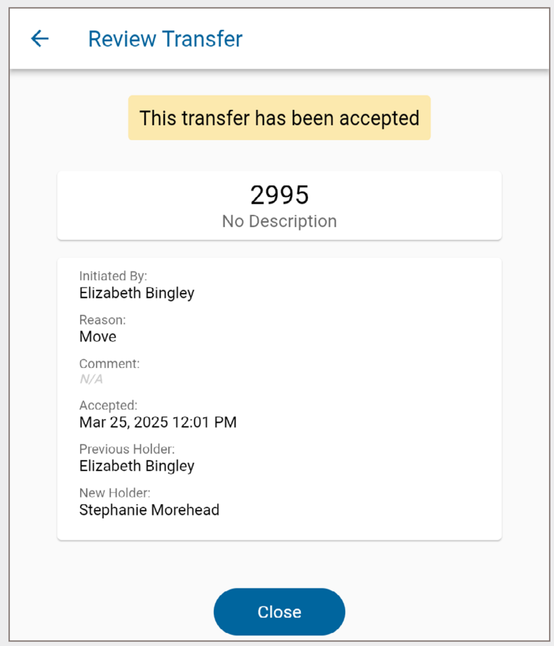


*Fig. 147 – Review Transfer screen – outgoing transfer*

### 1.4 Collect Now

If you are within the reservation window for an asset reserved for your use, it appears in the **Collect Now** area of the **Home** screen.

Details about current reservation cards include the following:

- The top bar shows the status of the asset. Since you have the asset reserved, it should show Available, as shown in ***Fig. 148***.
  - If the status bar displays any other status indicating that your reserved asset is not available, contact your admin.
- The icon shows the type of asset reserved:
  - Key 
  - Spare key 
  - Dealer plate 
- The text at the bottom of the card shows the name of the reserved asset.

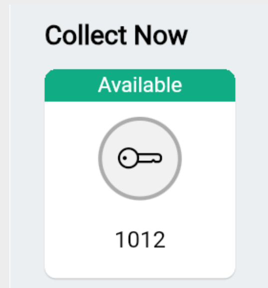


*Fig. 148 – Collect now card*

1. Select the **reservation card** to open the Asset details screen and view details about the asset.
   - During an active reservation window, the Asset details screen displays a green calendar with a check mark in the  upper-right corner of the screen, as shown in ***Fig. 149***.

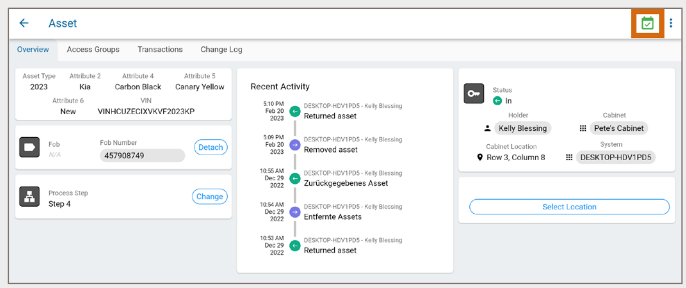


*Fig. 149 – Asset details screen – currently reserved asset*

### 1.5 Collect Later

If you have future reservations for one or more assets, they appear in the **Collect Later** area of the **Home** screen.

Details about current reservation cards include the following:

- The top bar shows the time and date of the reservation, such as Mar 26 12:00 AM, as shown in ***Fig. 150***.
- The icon shows the type of asset reserved:
  - Key
  - Spare key
  - Dealer plate
- The text at the bottom of the card shows the name of the reserved asset.

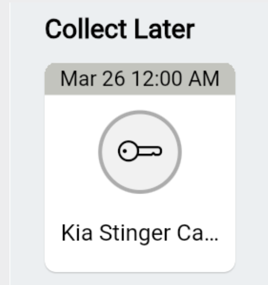


*Fig. 150 – Collect later card*

1. Select the **reservation card** to open the Asset details screen and view details about the asset, as shown in ***Fig. 151***.

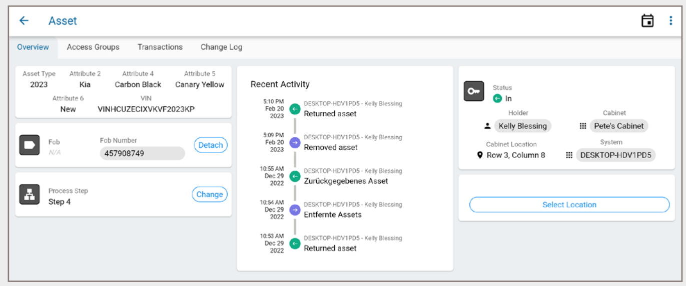


*Fig. 151 – Asset details screen – asset with upcoming reservation*

## 1.6 My Held

Any assets you have checked out of the cabinet and currently hold appear in the **My Held** area of the **Home** screen.

Details about held asset cards include the following:

- The top bar displays when you took possession of the asset, such as a day ago, as shown in ***Fig. 152***.
- The icon displays the type of asset you have checked out:
  - Key 
  - Spare key 
  - Dealer plate 
- The text at the bottom of the card shows the Smart Tag number (if any), asset name, and asset description.

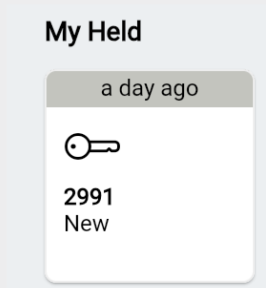


*Fig. 152 – My held card*

1. Select the **asset card** to open the Asset details screen and view details about the asset, as shown in ***Fig. 153***.

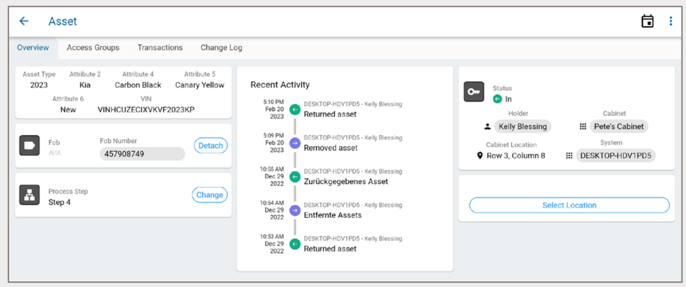


*Fig. 153 – Asset details screen*

## 2. Dashboard tab

In addition to the navigation menus that appear on most screens (see **Navigation**), the **Dashboard** tab on the **Home** screen provides an at-a-glance overview of the status of your assets and the activity of your users over the last 120 days, as shown in ***Fig. 154*** and ***Fig. 155***.

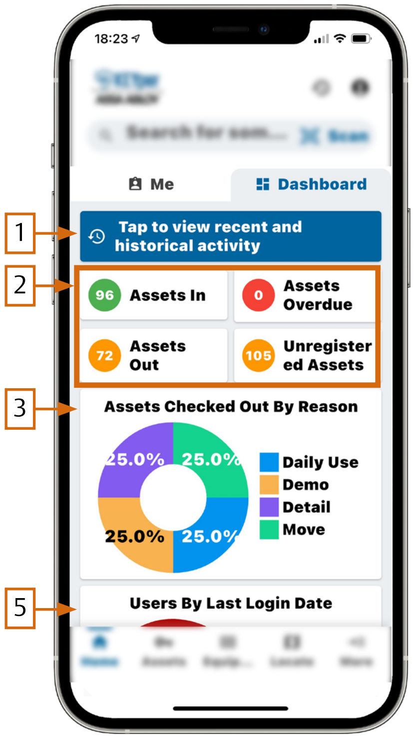


*Fig. 154 – Dashboard tab of Home screen (KEYper GO)*


*Fig. 155 – Dashboard tab in Home screen (KEYper GO Web)*

The **Dashboard** tab is organized as follows:

1. Tap to view recent and historical activity

***Note:*** *This button appears in KEYper GO only. It opens the* ***History*** *screen, where you can view recent system events. The* ***History*** *screen is also available in KEYper GO Web, but it is displayed as a tab under* ***Activity****. For details on navigating this screen, see* ***History****.*

2. Asset count by status
3. Assets Checked Out By Reason
4. Illegal Activity Last 30 Days
5. Users By Last Login Date
6. Keys Not Checked Out

***Note:*** *If you do not see these areas in KEYper GO, try swiping to scroll down the* ***Dashboard*** *tab.*

### *2.1 Asset count by status*

The top bar of the **Dashboard**, indicated by 2 in ***Fig. 154*** and ***Fig. 155***, allows you to quickly check all assets in your system according to their status. A real-time count of the assets in each of the following categories is available:

- **Assets In**: Number of assets currently checked into the cabinet(s) in your system
- **Assets Overdue**: Number of assets checked out past the window allowed by the parameters of the access group
- **Assets Out**: Number of assets currently checked out of the cabinet(s) in your system
- **Unregistered Assets**: Number of unused fobs without keys or dealer plates attached that are stored in the cabinet(s) in your system

### *2.2 Assets Checked Out By Reason*

The **Assets Checked Out By Reason** area of the **Dashboard**, indicated by 3 in ***Fig. 154*** and ***Fig. 155***, provides a visual breakdown of the reasons the keys and dealer plates currently checked out were issued. Only those issue reasons that have been selected appear in this donut chart. Issues reasons may be customized within the classic Web Admin. See the **Electronic System Manual**.

### *2.3 Illegal Activity Last 30 Days*

The **Illegal Activity Last 30 Days** area of the **Dashboard**, indicated by 4 in ***Fig. 155***, provides a visual breakdown of the illegal activity on the system within the past 30 days. Only those activities that have taken place appear in this donut chart. In the example in ***Fig. 154***, the entirety of the unauthorized activity in the past 30 days consisted of removing fobs without properly checking them out (illegal fob removal). Other illegal activities include illegal door opening.

### *2.4 Users By Last Login Date*

The **Users By Last Login Date** area of the **Dashboard**, indicated by 5 in ***Fig. 154*** and ***Fig. 155***, provides a visual breakdown of the percentage of users who have logged into the system within the past 30, 60, 90, and 120 days. Any time periods that lack data will not appear in this donut chart. In the example in ***Fig. 154***, only 0.1% of registered users have logged in within the last 30 days. 98.1% of users have not logged in within the past 120 days. This information is useful for getting an idea of how your system is being used or as a reminder to remove users who are not actively using the system. It is recommended to audit your users periodically according to this donut chart and other reports and remove inactive users for the security of your system. If you do not want to delete users that may become active again in the future, you may toggle the inactive users as locked out of the system. This would require an admin to unlock their permissions so they can log into the system if they were to try. See **Add user** for further information about this setting.

### *2.5 Keys Not Checked Out*

The K**eys Not Checked Out** area of the **Dashboard**, indicated by 6 in ***Fig. 155***, provides a visual breakdown of the percentage of keys that have not been checked out within the past 30, 60, 90, and 120 days. Any time periods that lack data do not appear in this donut chart. This is useful to know at a glance which of your assets are not being used. If you are in the automotive industry, this can mean these vehicles are not being shown to customers.

# Assets

From the **Assets** screen, you can easily view the details of and manage your various assets and reservations, as shown in *Fig. 156* and *Fig. 157*. Select any of the tabs to quickly see the status of your assets organized into a variety of views.

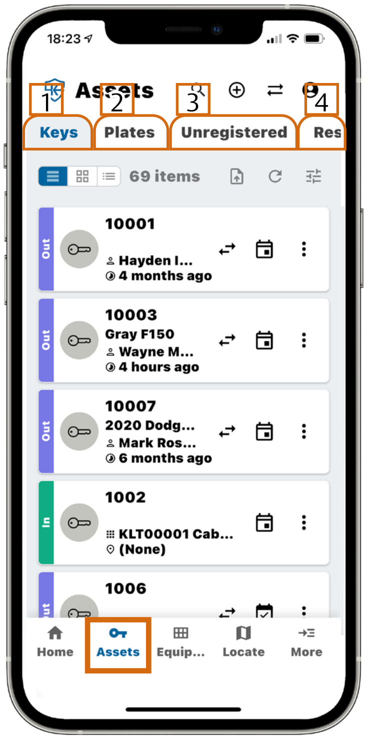


*Fig. 156 – The default view of the Assets screen (KEYper GO)*

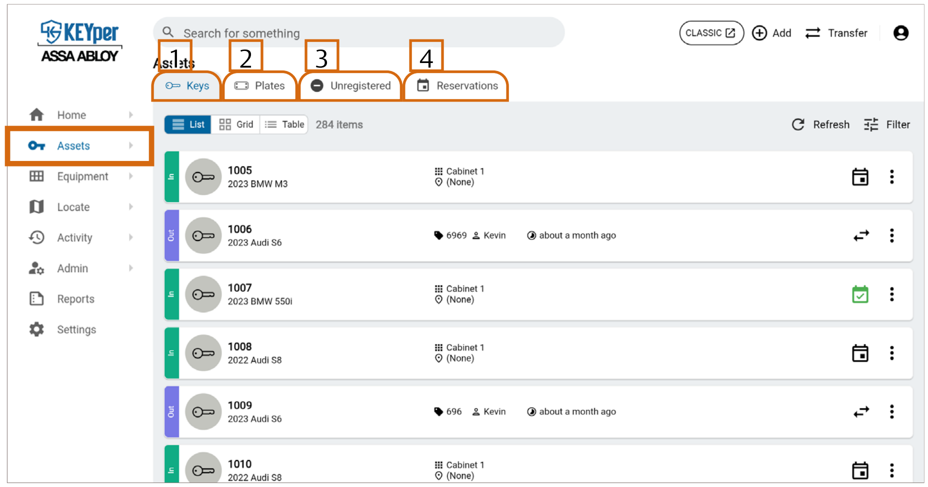


*Fig. 157 – The default view of the Assets screen (KEYper GO Web)*

The **Assets** screen is organized as follows:

1. **Keys tab**
2. **Plates tab**
3. **Unregistered tab**
4. **Reservations tab**

## 1. Keys tab

The **Keys** tab shows all registered keys and spare keys in your system, as well as details about each. From this tab, you can view an asset's details, edit or delete the asset, reserve the asset for check-out, or transfer the asset to yourself or another user.

### *1.1 List view*

By default, your keys and spare keys are displayed in a list view that continually loads as you scroll. Select an entry to open the **Asset details screen**.

The information displayed in the list view of the **Keys** tab includes the following, as shown in ***Fig. 158***:


*Fig. 158 – Asset screen – Keys tab – list view*

1. **Status**: The colored bar indicates the status of the key.
   - In indicates that the asset is checked into a cabinet.
   - Out indicates the asset is checked out of a cabinet.
   - Overdue indicates the asset has been checked out past the time allowed by the asset's or user's access group permissions.
2. **Type of asset**
   - The icon indicates whether the asset is a key or a spare key.
3. **Name and description**: The bold text next to the asset icon indicates the name of the asset. The optional description appears below the asset's name.
4. **Tag**: If there is a Smart Tag attached to the fob, the number is displayed. For further information about Smart Tags, see the section on fob labeling in the **Asset Registration and Fob Labeling Guide**.
5. **Current holder or cabinet**:
   - If the key's status is In, the center text displays the name of the cabinet where the key is housed.
     - If either **Lot Blocking** or **Lot Location** is enabled, the parking spot or parking lot where the vehicle is parked is also displayed.
   - If the key's status is Out, the center text displays the current holder of the key and how long ago they checked it out.
6. **Reserve or transfer**:
   - If the key's status is In and is not currently reserved, the **black calendar** indicates that you can select the calendar to quick reserve the key for the next 15 minutes only. You can also select the **black calendar** to set a custom reservation for later in the day, regardless of whether key is checked out or currently reserved. See **Add reservations** for more information.
     - The **green calendar** indicates that the key is already reserved.
   - If the key's status is Out, you may select **Transfer** to quickly take possession of or transfer the key to another user. See **Transfer** for more information.
7. **Quick action menu**: Select **menu** to open the **quick action menu**, which allows limited users to share or open the full asset record.
   - Full users and admins may additionally reserve, edit, or delete the asset.
8. **Import:** It is possible for admins to import batches or lists of assets using the **Import** button. This feature is especially useful during the initial installation of the system as it facilitates rapid asset registration by populating the asset attribute databases. For more information, see **Add assets using the Import feature**.
9. **Refresh**: Select **Refresh** to refresh the asset list to show new changes.
10. **Filter**: Select **Filter** to filter the list of assets by System, Cabinet, Status, Year, Make, or Model. See **Filter** for more information.

***Note:*** *The asset attributes that appear in the* ***Filter*** *menu are configurable to your industry. For more information on how to configure asset attributes in the Web Admin, see the* ***Electronic System Manual****.*

### 1.2 Grid view

To organize your keys and spare keys into a grid view that continually loads as you scroll, select the **Grid** button at the top of the screen. Select an asset card to open the **Asset details screen**.

The information displayed in the grid view of the **Keys** tab includes the following, shown in ***Fig. 159***:

1. **Status**: The colored bar indicates the status of the key.
   - In indicates that the asset is checked into a cabinet.
   - Out indicates the asset is checked out of a cabinet.
   - Overdue indicates the asset has been checked out past the time allowed by the asset's or user's access group permissions.
2. **Type of asset:**
   - The icon indicates whether the asset is a key or a spare key.

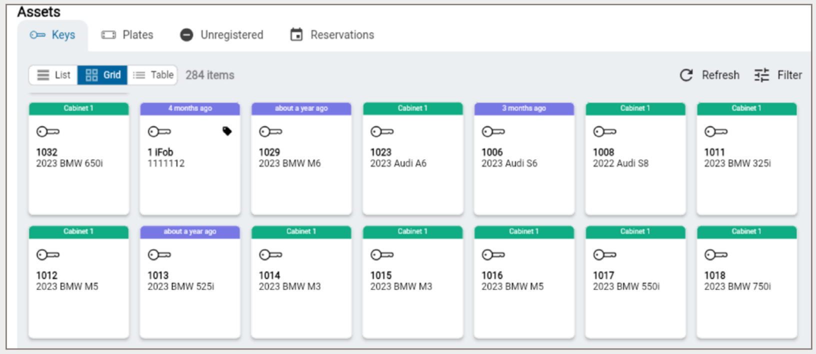

*Fig. 159 – Asset screen – Keys tab – grid view*

3. **Tag**: If there is a Smart Tag attached to the fob, the number is displayed. For further information about Smart Tags, see the section on fob labeling in the **Asset Registration and Fob Labeling Guide**.
4. **Name and description:** The bold text under the asset icon indicates the name of the asset. The optional description
5. **Refresh**: Select **Refresh** to refresh the asset list to show new changes.
6. **Filter**: Select **Filter** to filter the list of assets by System, Cabinet, Status, Year, Make, or Model. See **Filter** for more information.

***Note:*** *The asset attributes that appear in the* ***Filter*** *menu are configurable to your industry. For more information on how to configure asset attributes in the Web Admin, see the* ***Electronic System Manual****.*

## 1.3 Table view

To organize your keys and spare keys into a table view, select the **Table** button at the top of the screen. Assets are arranged into pages of 10 records each. Navigate the pages by using the arrows at the bottom of the screen. Each column can be sorted into ascending or descending order.

The information displayed in the table view of the **Keys** tab includes the following, shown in ***Fig. 160***:

1. **Name**: The name of the asset is displayed within a gray bubble. Click or tap to open the **Asset details screen**.
   - Selecting the box next to an asset's name allows admins to select and delete one or more assets using the **Delete** button.
   - Alternatively, selecting the box next to an asset's name allows admins and users to print asset labels for one or more assets using the **Print Labels** button.

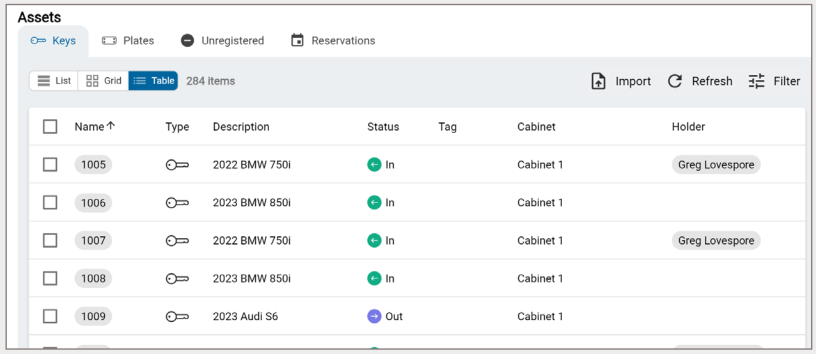


*Fig. 160 – Asset screen – Keys tab – table view*

2. **Type of asset**: The icon indicates whether the asset is a key or a spare key.
3. **Description**: The asset's optional description is displayed.
4. **Status**: The colored circles show quickly whether the asset is checked in or checked out of the cabinet.
   - indicates the asset is checked into a cabinet.
   - indicates the asset is checked out of a cabinet.
5. **Tag**: If there is a Smart Tag attached to the fob, the number is displayed. For further information about Smart Tags, see the section on fob labeling in the **Asset Registration and Fob Labeling Guide**.
6. **Cabinet**: The name of the cabinet the key is checked into or was last checked out from is displayed.
7. **Holder**: If the key is checked out, the name of the user who holds it is displayed. The holder is not necessarily the same person as the one who checked it out of the cabinet if a transfer in the field has occurred.
8. **Import:** It is possible for admins to import batches or lists of assets using the **Import** button. This feature is especially useful during the initial installation of the system as it facilitates rapid asset registration by populating the asset attribute databases. For more information, see **Add assets using the Import feature**.
9. **Refresh**: Select **Refresh** to refresh the asset list to show new changes.
10. **Filter**: Select **Filter** to filter the list of assets by System, Cabinet, Status, Year, Make, or Model. See **Filter** for more information.

***Note:*** *The asset attributes that appear in the* ***Filter*** *menu are configurable to your industry. For more information on how to configure asset attributes in the Web Admin, see the* ***Electronic System Manual****.*

### 1.4 *Filter*

By default, the **Assets** tab displays all assets in all connected systems.

Select **Filter** to filter the list of assets according to the following choices, shown in ***Fig. 161***:

1. **Systems**: If you have multiple systems, view the assets in a particular system by selecting **System** then choosing the system(s) whose assets you want to display.
   - A system is one or more cabinets controlled by a single kiosk cabinet with a touchscreen computer.
2. **Cabinets**: View the assets in a particular cabinet by selecting **Cabinets** then choosing the name of the cabinet(s) whose assets you want to display.
   - Each system consists of between one and  individual cabinets, depending on your setup.
3. **Asset Status Type**: Select **Asset Status Type** then choose **In**, **Out**, and/or **Overdue** to display only those assets that match the chosen status type.
4. **Year**, **Make**, **Model**: These are asset attributes configured for your business. By default, they are set up for the automotive industry, but they are customizable with the help of Support. They allow you to search and filter by such attributes as Year, Make, and/or Model of the asset's vehicle.
   - Select one of the attributes, such as **Year**, then choose one or more years from the list to display only those assets that match the chosen year(s).
5. After making your selections, select **Apply** to view the filtered list.
   - Select **Cancel** if you wish to exit the filter screen without applying any filters.
   - Select **Reset** if you wish to clear your selection(s).

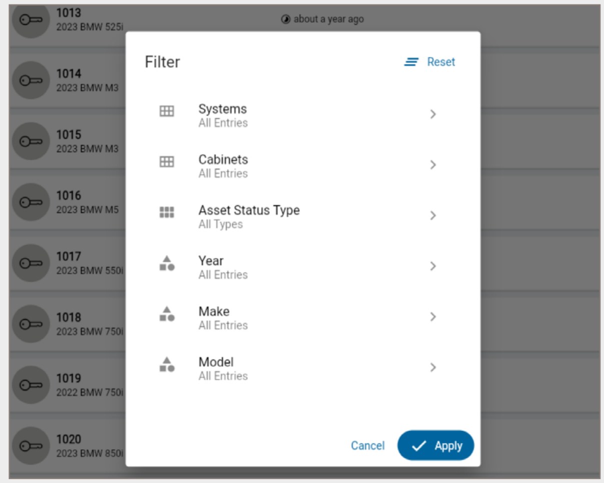


*Fig. 161 – Assets screen – filter options*

## 2. Plates tab

The **Plates** tab shows all registered dealer plates in your system, as well as details about each. From this tab, you can view an asset's details, edit or delete the asset, reserve the asset for check-out, or transfer the asset to yourself or another user.

### *2.1 List view*

By default, your dealer plates are displayed in a list view that continually loads as you scroll. Select an entry to open the **Plates** tab.

The information displayed in the list view of the **Plates** tab includes the following, as shown in ***Fig. 162***:

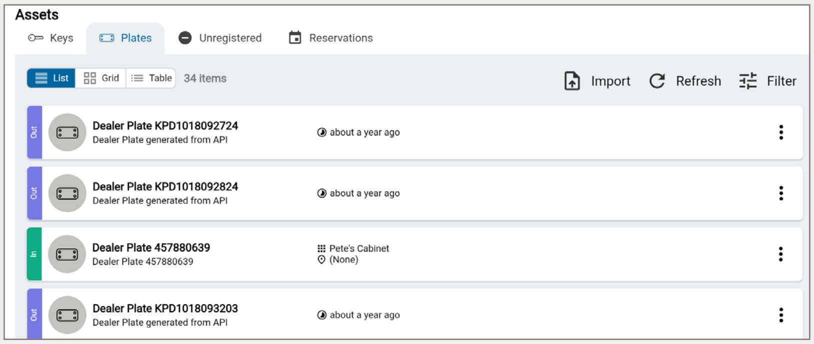


*Fig. 162 – Assets screen – Plates tab – list view*

1. **Status**: The colored bar indicates the status of the key.
   - In indicates that the asset is checked into a cabinet.
   - Out indicates the asset is checked out of a cabinet.
   - Overdue indicates the asset has been checked out past the time allowed by the asset's or user's access group permissions.
2. **Type of asset**: The asset type should always be dealer plate.
3. **Tag**: If there is a Smart Tag attached to the fob, the number is displayed. For further information about Smart Tags, see the section on fob labeling in the **Asset Registration and Fob Labeling Guide**.
4. **Name and description**: The bold text next to the asset icon indicates the name of the asset. The optional description appears below the asset's name.
5. **Current holder or cabinet**:
   - If the dealer plate's status is In, the center text displays the name of the cabinet where the plate is housed.
   - If the dealer plate's status is Out, the center text displays the current holder of the plate and how long ago they checked it out.
6. **Quick action menu**: Select **menu** to open the **quick action menu**, which allows limited users to share or open the full asset record.
   - Full users and admins may additionally edit or delete the asset.
7. **Import:** It is possible for admins to import batches or lists of assets using the **Import** button. This feature is especially useful during the initial installation of the system as it facilitates rapid asset registration by populating the asset attribute databases. For more information, see **Add assets using the Import feature**.
8. **Refresh**: Select **Refresh** to refresh the asset list to show new changes.
9. **Filter**: Select **Filter** to filter the list of assets by System, Cabinet, Status, Year, Make, or Model. See **Filter** for more information.

***Note:*** *The asset attributes that appear in the* ***Filter*** *menu are configurable to your industry. For more information on how to configure asset attributes in the Web Admin, see the* ***Electronic System Manual****.*

## 2.2 Grid view

To organize your dealer plates into a grid view that continually loads as you scroll, select the **Grid** button at the top of the screen. Select an asset card to open the **Plates** tab.

The information displayed in the grid view of the **Plates** tab includes the following, shown in ***Fig. 163***:

1. **Status**: The colored bar indicates the status of the key.
   - In indicates that the asset is checked into a cabinet.
   - Out indicates the asset is checked out of a cabinet.
   - Overdue indicates the asset has been checked out past the time allowed by the asset's or user's access group permissions.
   - The text within the colored bar indicates the location of the asset (if checked in) or how long ago it was checked out.

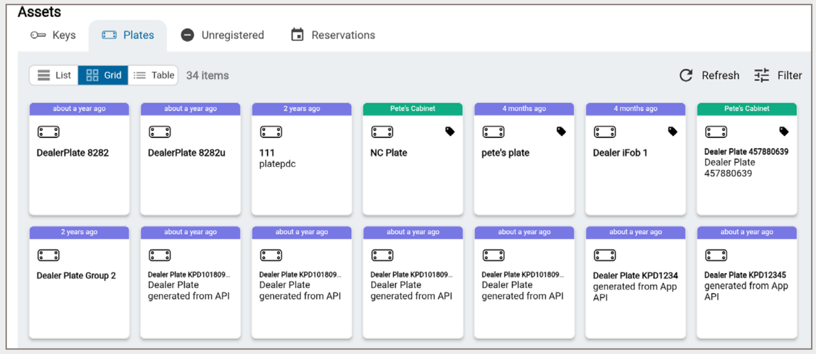


*Fig. 163 – Assets screen – Plates tab – grid view*

2. **Type of asset**: The asset type should always be dealer plate.
3. **Tag**: If there is a Smart Tag attached to the fob, the number is displayed. For further information about Smart Tags, see the section on fob labeling in the **Asset Registration and Fob Labeling Guide**.
4. **Name and description**: The bold text under the asset icon indicates the name of the asset. The optional description appears below the asset's name.
5. **Refresh**: Select **Refresh** to refresh the asset list to show new changes.
6. **Filter**: Select **Filter** to filter the list of assets by System, Cabinet, Status, Year, Make, or Model. See **Filter** for more information.

***Note:*** *The asset attributes that appear in the **Filter** menu are configurable to your industry. For more information on how to configure asset attributes in the Web Admin, see the **Electronic System Manual**.*

### 2.3 Table view

To organize your dealer plates into a table view, select the **Table** button at the top of the screen. Assets are arranged into pages of 10 records each. Navigate the pages by using the arrows at the bottom of the screen. Each column can be sorted into ascending or descending order.

The information displayed in the table view of the **Plates** tab includes the following, shown in ***Fig. 164***:

1. **Name**: The name of the asset is displayed within a gray bubble. Select to open the **Asset details screen**.
   - Selecting the box next to an asset's name allows admins to select and delete one or more assets using the **Delete** button.
   - Alternatively, selecting the box next to an asset's name allows admins and users to print asset labels for one or more assets using the **Print Labels** button.

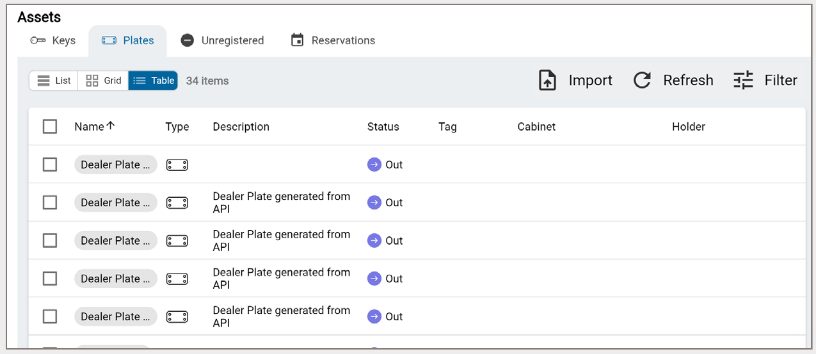


*Fig. 164 – Assets screen – Plates tab – table view*

2. **Type of asset**: The asset type should always be dealer plate.
3. **Description**: The asset's optional description is displayed.
4. **Status**: The colored circles show quickly whether the asset is checked in or checked out of the cabinet.
   - indicates the asset is checked into a cabinet.
   - indicates the asset is checked out of a cabinet.
5. **Tag**: If there is a Smart Tag attached to the fob, the number is displayed. For further information about Smart Tags, see the section on fob labeling in the **Asset Registration and Fob Labeling Guide**.
6. **Cabinet**: The name of the cabinet the dealer plate is checked into or was last checked out from is displayed.
7. **Holder**: If the dealer plate is checked out, the name of the user who holds it is displayed. The holder is not necessarily the same person as the one who checked it out of the cabinet if a transfer in the field has occurred.
8. **Import:** It is possible for admins to import batches or lists of assets using the **Import** button. This feature is especially useful during the initial installation of the system as it facilitates rapid asset registration by populating the asset attribute databases. For more information, see **Add assets using the Import feature**.
9. **Refresh**: Select **Refresh** to refresh the asset list to show new changes.
10. **Filter**: Select **Filter** to filter the list of assets by System, Cabinet, Status, Year, Make, or Model. See **Filter** for more information.

***Note:*** *The asset attributes that appear in the* ***Filter*** *menu are configurable to your industry. For more information on how to configure asset attributes in the Web Admin, see the* ***Electronic System Manual****.*

## 3. Unregistered tab

The **Unregistered** tab shows all unregistered assets, blank fobs without keys or plates attached, stored in your system, as well as details about each. From this tab, you can view a fob's details, attach or detach an asset, or transfer the asset to yourself or another user.

### *3.1 List view*

By default, your unregistered assets are displayed in a list view that continually loads as you scroll. Select an entry to open the **Asset details screen**.

The information displayed in the list view of the **Unregistered** tab includes the following, as shown in ***Fig. 165***:

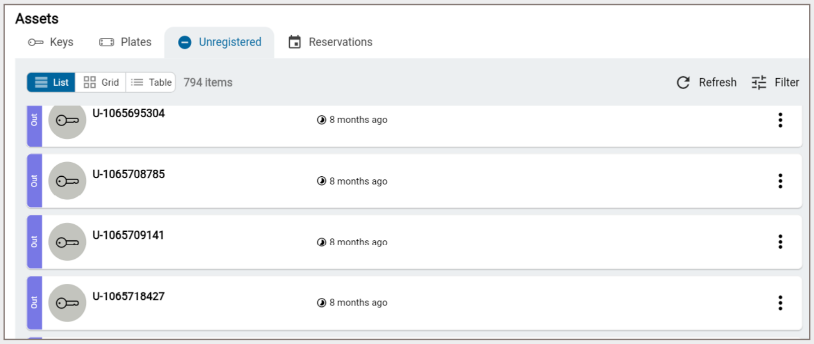


*Fig. 165 – Assets screen – Unregistered tab – list view*

1. **Status**: The colored bar indicates the status of the key.
   - In indicates that the asset is checked into a cabinet.
   - Out indicates the asset is checked out of a cabinet.
2. **Type of asset**: The default asset type for an unregistered asset is a key.
3. **Name and description**: The bold text next to the asset icon indicates the name of the asset. The optional description appears below the asset's name.
4. **Tag**: If there is a Smart Tag attached to the fob, the number is displayed. For further information about Smart Tags, see the section on fob labeling in the **Asset Registration and Fob Labeling Guide**.
5. **Current holder or cabinet**:
   - If the key's status is In, the center text displays the name of the cabinet where the key is housed.
6. **Reserve or transfer**:
   - If the fob's status is In and is not currently reserved, the **black calendar** indicates that you can select the calendar to quick reserve the key for the next 15 minutes only. You can also select the **black calendar** to set a custom reservation for later in the day, regardless of whether key is checked out or currently reserved. See **Add reservations** for more information.
     - The **green calendar** indicates that the fob is already reserved.
   - If the fob's status is Out, you may select **Transfer** to quickly take possession of or transfer the fob to another user. See **Transfer** for more information.
7. **Quick action menu**: Select **menu** to open the **quick action menu**, which allows limited users to share or open the full asset record.
   - Full users and admins may additionally edit the asset details to add a new asset or delete the unregistered asset to remove any information from the fob, making it an empty fob.
8. **Import:** It is possible for admins to import batches or lists of assets using the **Import** button. This feature is especially useful during the initial installation of the system as it facilitates rapid asset registration by populating the asset attribute databases. For more information, see **Add assets using the Import feature**.

***Note:*** *If you import an unregistered asset, you must go to the* ***Asset details screen*** *for the asset after it has been successfully imported and toggle on the* ***Registered*** *field. Otherwise, the asset cannot be checked out.*

9. **Refresh**: Select **Refresh** to refresh the asset list to show new changes.
10. **Filter**: Select **Filter** to filter the list of assets by System, Cabinet, Status, Year, Make, or Model. See **Filter** for more information.

***Note:*** *The asset attributes that appear in the* ***Filter*** *menu are configurable to your industry. For more information on how to configure asset attributes in the Web Admin, see the* ***Electronic System Manual***.

### 3.2 *Grid view*

To organize your unregistered assets into a grid view that continually loads as you scroll, select the **Grid** button at the top of the screen. Select an asset card to open the **Asset details screen**.

The information displayed in the grid view of the **Unregistered** tab includes the following, shown in ***Fig. 166***:

1. **Status**: The colored bar indicates the status of the key.
   - In indicates that the asset is checked into a cabinet.
   - Out indicates the asset is checked out of a cabinet.
   - Overdue indicates the asset has been checked out past the time allowed by the asset's or user's access group permissions.
   - The text within the colored bar indicates the location of the asset (if checked in) or how long ago it was checked out.

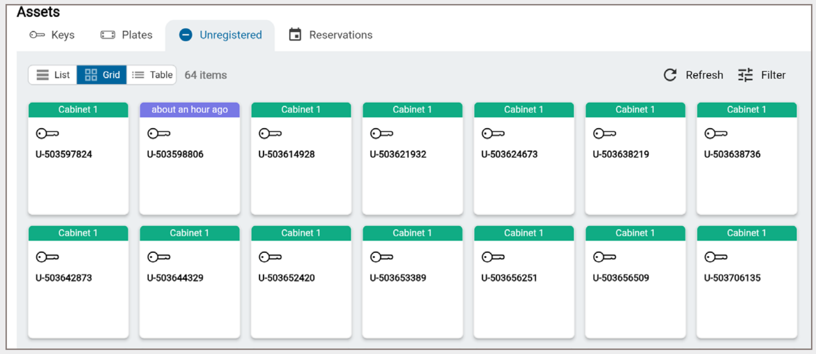


*Fig. 166 – Assets screen – Unregistered tab – grid view*

2. **Type of asset**: The default asset type for an unregistered asset is a key.
3. **Tag**: If there is a Smart Tag attached to the fob, the number is displayed. For further information about Smart Tags, see the section on fob labeling in the **Asset Registration and Fob Labeling Guide**.
4. **Name**: The bold text under the asset icon indicates the name of the asset. Unregistered asset names begin with a U- prefix.
5. **Refresh**: Select **Refresh** to refresh the asset list to show new changes.
6. **Filter**: Select **Filter** to filter the list of assets by System, Cabinet, Status, Year, Make, or Model. See **Filter** for more information.

***Note:*** *The asset attributes that appear in the* ***Filter*** *menu are configurable to your industry. For more information on how to configure asset attributes in the Web Admin, see the* ***Electronic System Manual****.*

### 3.3 Table view

To organize your unregistered assets into a table view, select the **Table** button at the top of the screen. Assets are arranged into pages of 10 records each. Navigate the pages by using the arrows at the bottom of the screen. Each column can be sorted into ascending or descending order.

The information displayed in the table view of the **Unregistered tab** includes the following, shown in ***Fig. 167***:

1. **Name**: The name of the asset is displayed within a gray bubble.
   - Click or tap to open the **Asset details screen**.
   - Selecting the box next to an asset's name allows admins to select and delete one or more assets using the **Delete** button.
2. **Type of asset**: The default asset type for an unregistered asset is a key.
3. **Description**: Unregistered assets do not typically have descriptions.

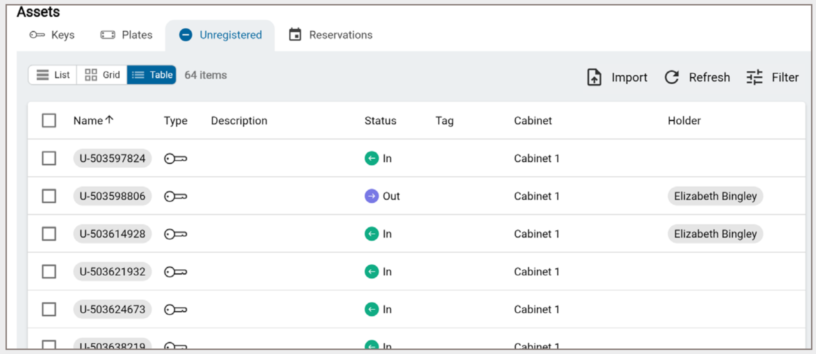


*Fig. 167 – Assets screen – Unregistered tab – table view*

4. **Status**: The colored circles show at a glance whether the asset is checked into or checked out of the cabinet.
   - indicates the asset is checked into a cabinet.
   - indicates the asset is checked out of a cabinet.
5. **Tag**: If there is a Smart Tag attached to the fob, the number is displayed. For further information about Smart Tags, see the section on fob labeling in the **Asset Registration and Fob Labeling Guide**.
6. **Cabinet**: The name of the cabinet the key is checked into or was last checked out from is displayed.
7. **Holder**: If the key is checked out, the name of the user who holds it is displayed. The holder is not necessarily the same person as the one who checked it out of the cabinet if a transfer in the field has occurred.
8. **Import:** It is possible for admins to import batches or lists of assets using the **Import** button. This feature is especially useful during the initial installation of the system as it facilitates rapid asset registration by populating the asset attribute databases. For more information, see **Add assets using the Import feature**.

*__Note:__ If you import an unregistered asset, you must go to the __Asset details screen__ for the asset after it has been successfully imported and toggle on the __Registered__ field. Otherwise, the asset cannot be checked out.*

9. **Refresh**: Select **Refresh** to refresh the asset list to show new changes.
10. **Filter**: Select **Filter** to filter the list of assets by System, Cabinet, Status, Year, Make, or Model. See **Filter** for more information.

*__Note:__ The asset attributes that appear in the __Filter__ menu are configurable to your industry. For more information on how to configure asset attributes in the Web Admin, see the __Electronic System Manual__.*

## 4. Reservations tab

The **Reservations** tab shows all reserved assets organized into a calendar view, as shown in ***Fig. 168***. A number in a bubble on a date indicates the number of reservations for that day, if there are any.

To view, edit, or delete a reservation, do the following:

1. Select a date with one or more reservations to display the reservation details, as shown in ***Fig. 168***.
   - The bold name is the user who has reserved the asset.
   - The date and time of the reservation are displayed below the user.
   - The type of asset is indicated by the icon (key, spare key, or dealer plate).
   - The name of the asset and its attributes (typically Year, Make, Model, etc.) are displayed.

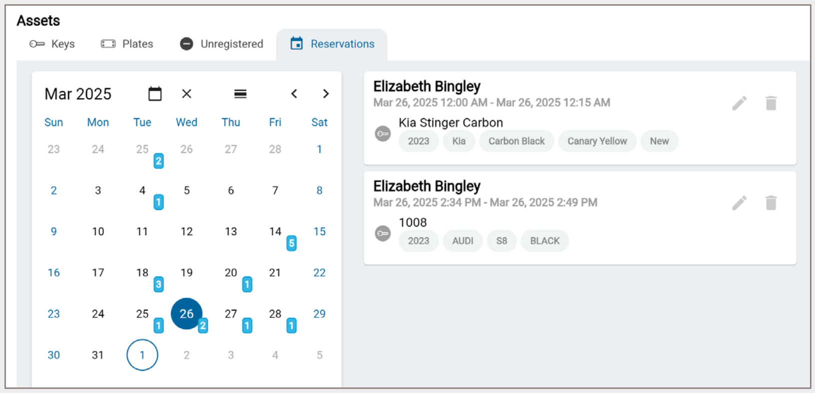


*Fig. 168 – Assets screen – Reservations tab – reservation details*

2. Select **edit** to make changes to the reservation details.
3. Select **delete** to delete the reservation.
4. Select the **calendar** to jump to today's date.
5. Select **clear** to clear any dates you have selected.

***Note:*** *Selecting* ***clear*** *does not delete reservations. It simply closes the reservation details panel.*

6. Select **switch calendar format** to toggle between month view, 2-week view, and 1-week view.
7. Select **back** and **forward** to move backwards or forwards in time.

## 5. Asset details screen

When you open an asset record, you are taken to the Asset details screen, shown in ***Fig. 169***. On the Asset details screen, you can view important information about the asset, including the fob it is assigned to, its current process step, recent activity, its location within the system or the lot, the access groups it belongs to, and more. With the proper permissions, you also have the ability to manage the asset from this screen. Available actions include attaching or detaching a fob, attaching or detaching a Smart Tag, editing the asset details, and reserving, transferring, or deleting an asset.

The Asset details screen is organized as follows:

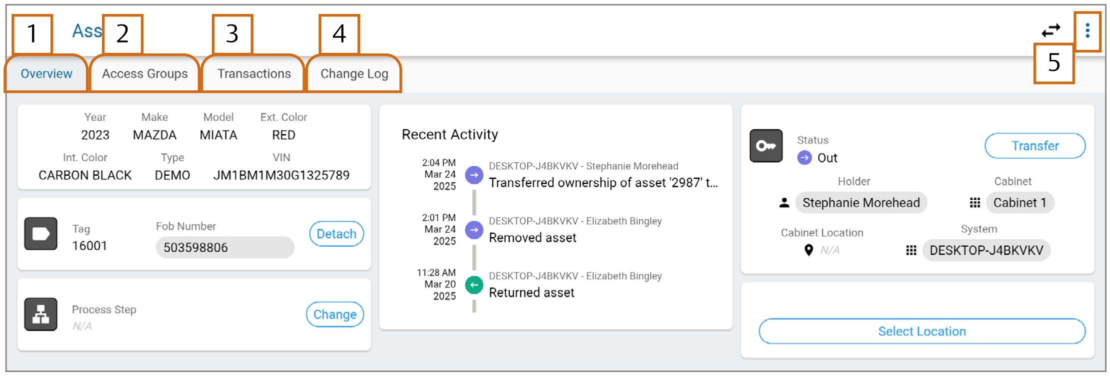


*Fig. 169 – The Overview tab of the Asset details screen*

1. **Overview tab**
2. **Access Groups tab**
3. **Transactions tab**
4. **Change log tab**
5. **Quick action menu**

### 5.1 *Overview tab*

The **Overview** tab allows all users to view the asset's details and activity. Full users and admins may additionally reserve and transfer assets, attach and detach Smart Tags and fobs, edit asset details, and delete assets. For further information about Smart Tags, see the section on fob labeling in the **Asset Registration and Fob Labeling Guide**.

#### *5.1.1 Asset attributes*

The asset attributes area of the **Overview** tab, shown in ***Fig. 170***, includes the following information:

- The asset attributes your company has chosen appear in this area of the asset overview. This example, set for the automotive industry, shows Year, Make, Model, Exterior Color, Interior Color, Type, and VIN.
- To learn more about how to configure your asset attributes in the classic Web Admin, see the **Electronic System Manual**.

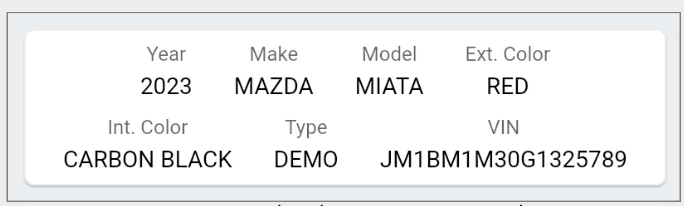


*Fig. 170 – Asset details screen – asset attributes*

### 5.1.2 Fob labeling

The fob labeling area of the **Overview** tab displays the number of the Smart Tag attached to the fob and the serial number of the fob to which the asset is assigned. For detailed information about fob labeling, see the **Asset Registration and Fob Labeling Guide**.

To attach a fob and/or edit the Smart Tag number, do the following:

1. If there is no fob attached to the asset, select **Attach** then scan a fob using the fob reader. See **Identify a fob**.

***Note:*** *The example has a fob attached, so the button says* ***Detach****.*

2. Select the **Fob Number** bubble to open the **Fob Overview** screen, as shown in ***Fig. 171***.

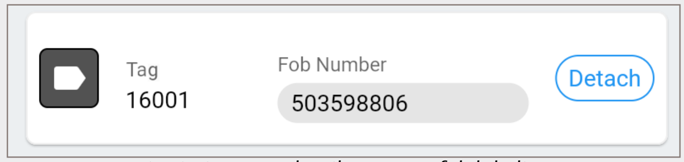


*Fig. 171 – Asset details screen – fob labeling*

3. Select the **quick action menu** ⋮ , then select **Edit** to open the **Edit Fob** screen, as shown in ***Fig. 172***.

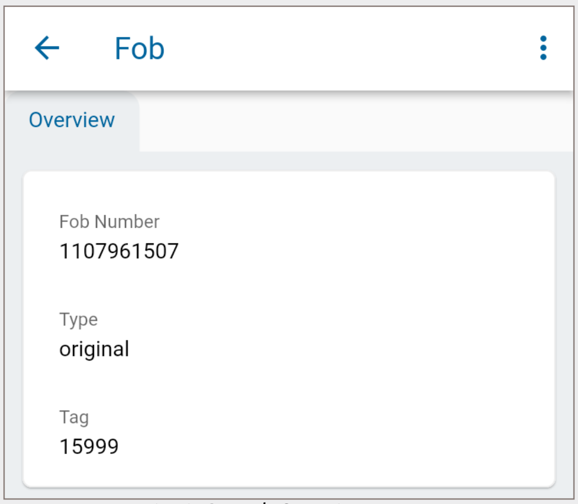


*Fig. 172 – Fob Overview screen*

4. Type the **number** of the Smart Tag you wish to attach to the fob, as shown in ***Fig. 173***.

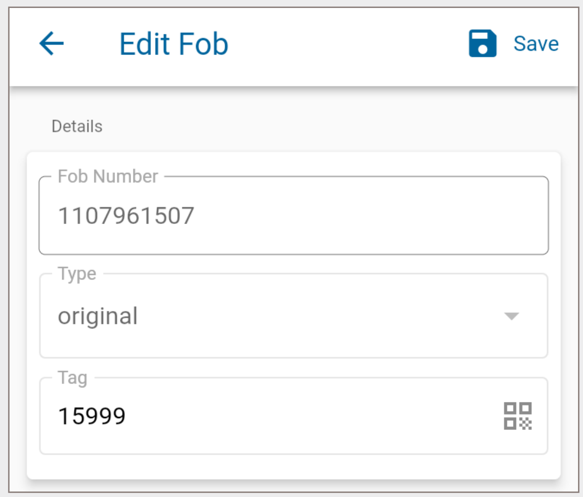


*Fig. 173 – Edit Fob screen*

***Note:*** *Scan functionality, which allows you to scan the Smart Tag to read its number, is currently only supported in KEYper GO. To scan a Smart Tag, tap* .

5. Select **Save**.

### 5.1.3 Process step

The process step area of the **Overview** tab, shown in ***Fig. 174***, displays the current process step the asset is in, if any. Currently, an asset's process step may only be changed during the check-in process. For more information, see the **Electronic System Manual**.

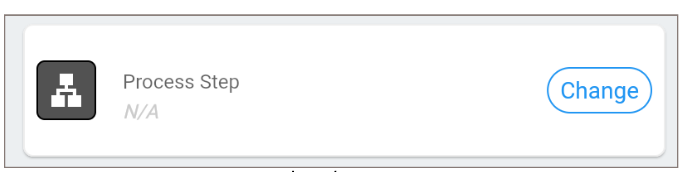


*Fig. 174 – Asset details screen – process step*

### 5.1.4 Recent activity

The recent activity area of the **Overview** tab displays recent transactions involving this asset's movement in and out of the cabinet and between holders, as shown in ***Fig. 175***.

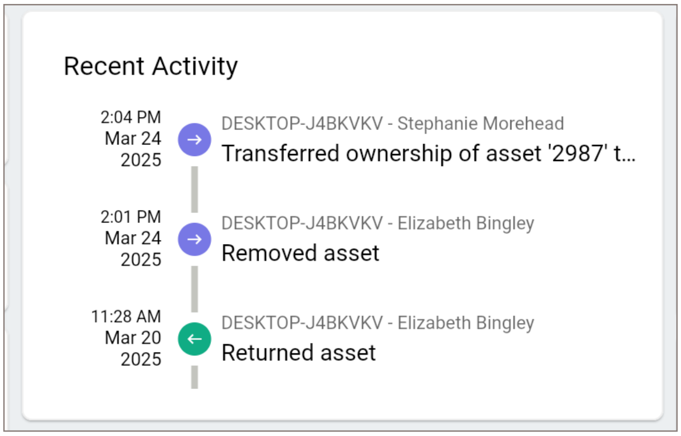


*Fig. 175 – Asset details screen – recent activity*

### 5.1.5 Status

The status area of the **Overview** tab, shown in ***Fig. 176***, displays information about the current status and location of the asset, including the following:

1. **Status**: Indicates the status of the asset within the system.
   - In indicates the asset is checked into a cabinet in the system.
   - Out indicates the asset is checked out of the system and a user is holding it.
2. **Transfer**: If the asset is checked out, you can transfer the asset to another user by selecting **Transfer**. See **Transfer** for further instructions.
3. **Holder**: The user who last had possession of the asset.

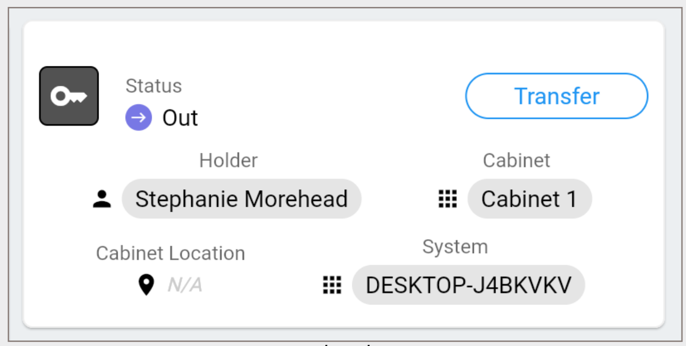


*Fig. 176 – Asset details screen – status*

***Note:*** *The holder is not necessarily the user who checked the asset out of the cabinet, as a user may check an asset out and then transfer it to another user in the field. See* ***Transfer*** *for more details.*

4. **Cabinet**: The name of the cabinet in your system where the asset was last checked into or out of.
   - Select the **cabinet name** to open the Socket Map screen, which displays a real-time view inside the cabinet. See **Equipment**.
5. **Cabinet Location**: The location of the asset within the cabinet, if available.
   - If the asset is checked in to the cabinet, the precise location of the asset within the cabinet is displayed, such as Row 18, Column 8.
   - If the asset is checked out of the system, this field displays ***N/A***.
6. **System**: The name of the system that the asset was last checked into or out of. Each system can consist of up to eight cabinets. This information is especially useful when you manage multiple systems.

### 5.1.6 Lot Location

The lot location area of the **Overview** tab, shown in ***Fig. 177*** and ***Fig. 178***, displays the following information:

1. **Lot Location**: The area where the vehicle is parked. To change the lot location, select **Select Location**, and choose from the list of available lots.
2. **GPS**: The GPS coordinates for the area where the vehicle is parked. To update the vehicle's GPS location, tap **Update Location from GPS** while next to the vehicle. The vehicle's GPS location is used to mark its location on the **LIVE Map tab** and on the map on the Asset details screen.

***Note:*** *A vehicle's GPS location is visible in KEYper GO and KEYper GO Web. However, to update the GPS location, you must use KEYper GO.*

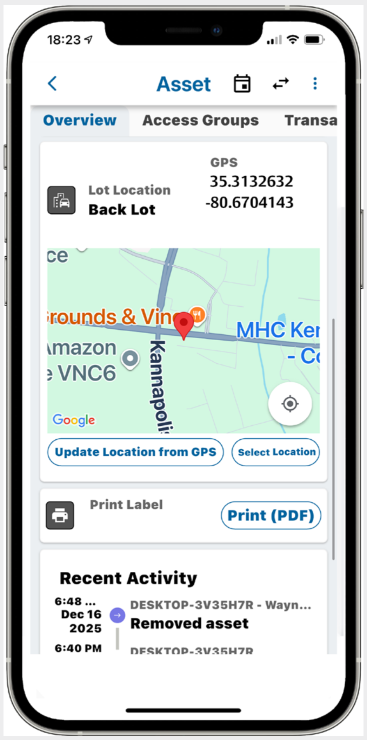


*Fig. 177 – Asset details screen – lot location (KEYper GO)*

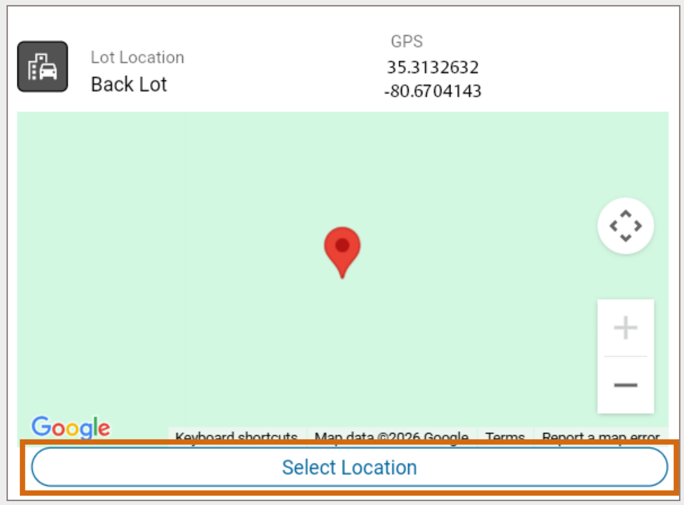


*Fig. 178 – Asset details screen – lot location (KEYper GO Web)*

### 5.1.7 Print Label

The print label area of the **Overview** tab, shown in ***Fig. 179***, allows you to generate and print asset labels. Asset labels help you manage assets more efficiently as they can be attached to the tamper seal or placed on the windshield of the vehicle and display information, such as the vehicle's stock number, make, model, etc. In KEYper GO, asset labels are particularly helpful when doing inventory scans.

To print asset labels, select **Print (PDF)**. A pop-up window will appear with the asset labels ready for print.


*Fig. 179 – Asset details screen – Print label*

***Notes:***

- *Use the KEYper Zebra Printer to print ready-to-go, adhesive asset labels. For assistance setting up your KEYper Zebra Printer, follow the instructions that come with the Zebra Printer or contact Support. If you do not have the KEYper Zebra Printer, you may use your own printer.*
- *If using a Zebra Printer, be sure to set your printer preferences/printer properties so that the page width is four inches and the height is five inches, as shown in **Fig. 180**.*

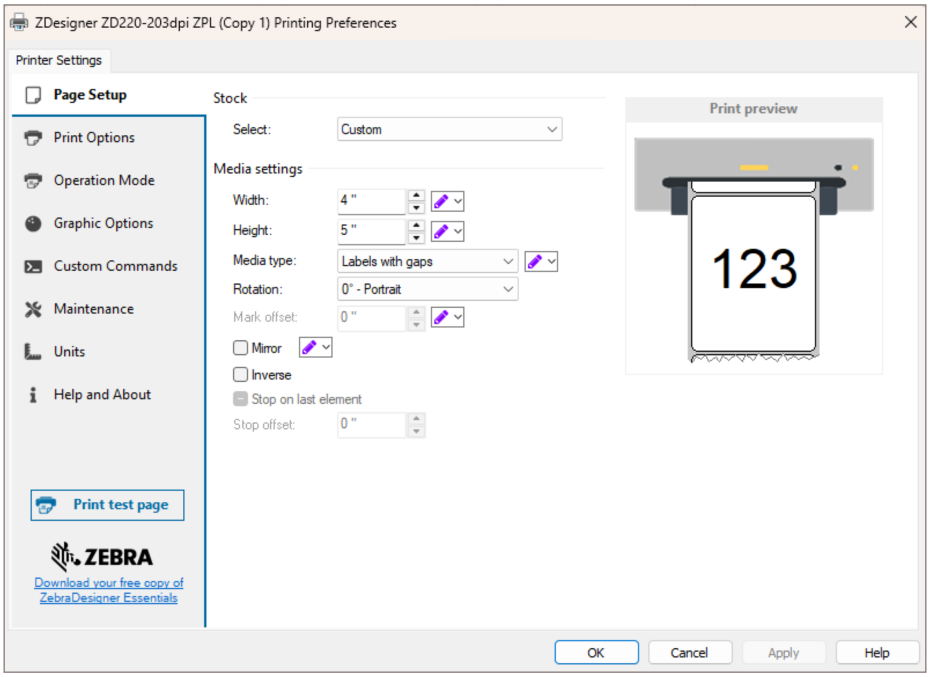


*Fig. 180 – Zebra Printer settings*

Once the labels are printed, you may begin using them. The asset labels printed for one vehicle are as follows:

- The large label can be put on the vehicle's windshield. This is indicated as "1" in *Fig. 181*.
- The two labels on the upper right side can be put on navigation discs, owner's manuals, or other vehicle accessories. These are indicated as "2" in *Fig. 181*.
- The two labels on the upper left side can be put on the front and back of the tamper seal attached to the vehicle's keys and associated fob. These are indicated as "3" in *Fig. 181*.

***Note:*** *The KEYper Zebra Printer is required for the asset labels to print in the correct sizes.*

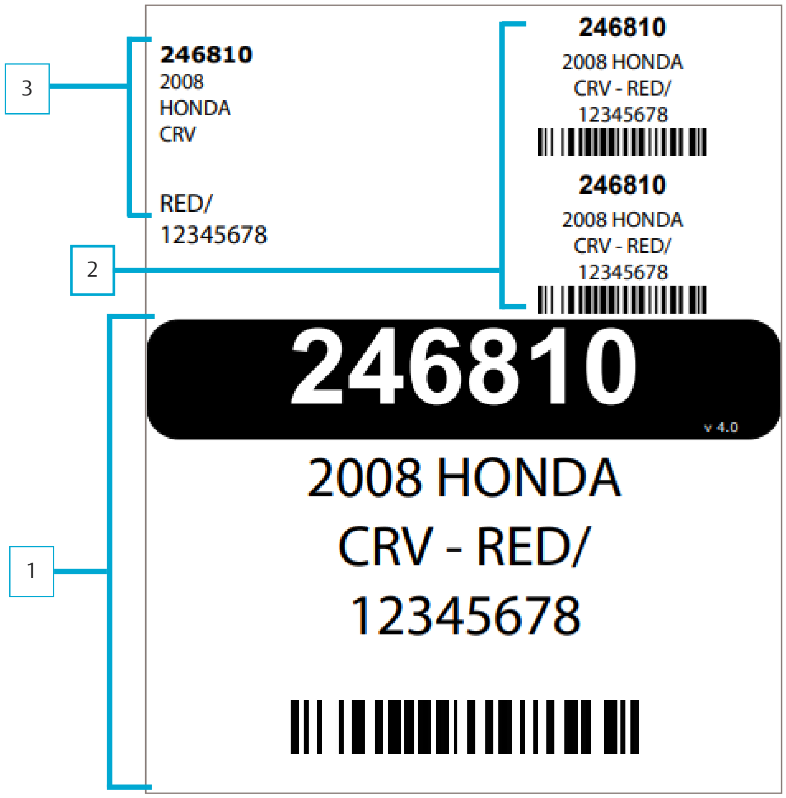


*Fig. 181 – Asset labels*

## 5.2 Access Groups tab

The **Access Groups** tab displays the access groups to which the asset belongs, as shown in ***Fig. 182***. Admins may edit the asset's access groups by checking or unchecking **Enabled** next to each access group. See **Add access group** and the **Electronic System Manual** for further information.

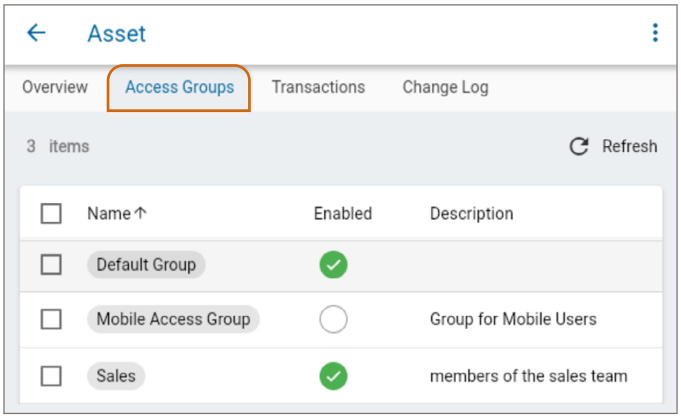


*Fig. 182 – The Access Groups tab of the Asset details screen*

## 5.3 Transactions tab

The **Transactions** tab displays the transactions involving the selected asset, including check-outs and check-ins with time stamps and the user who took or returned the asset, as shown in ***Fig. 183***. If an asset is transferred in the field without returning to the cabinet, this is logged as two check-out events back to back.

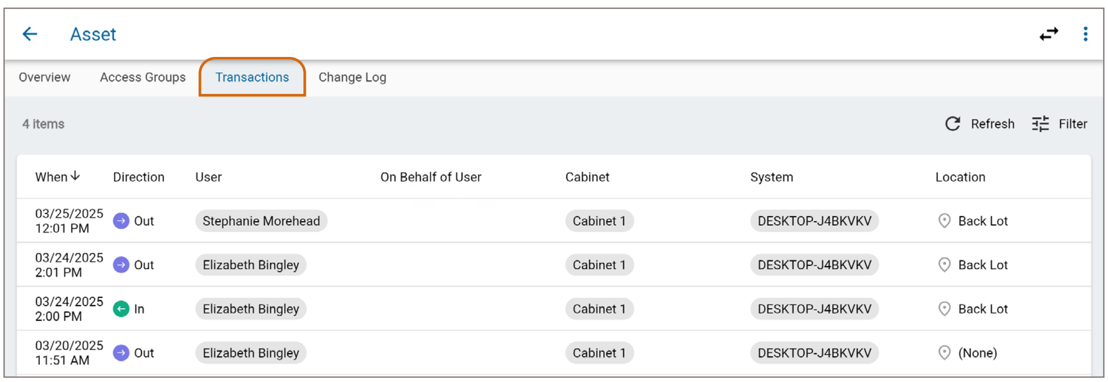


*Fig. 183 – The Transactions tab of the Asset details screen*

## 5.4 Change log tab

The **Change Log** tab displays a log of the changes made to the asset record, including any transfers of ownership, as shown in ***Fig. 184***. Select **Filter** to filter the log by date, registration status, user, or any particular term that you type in, such as "transfer."

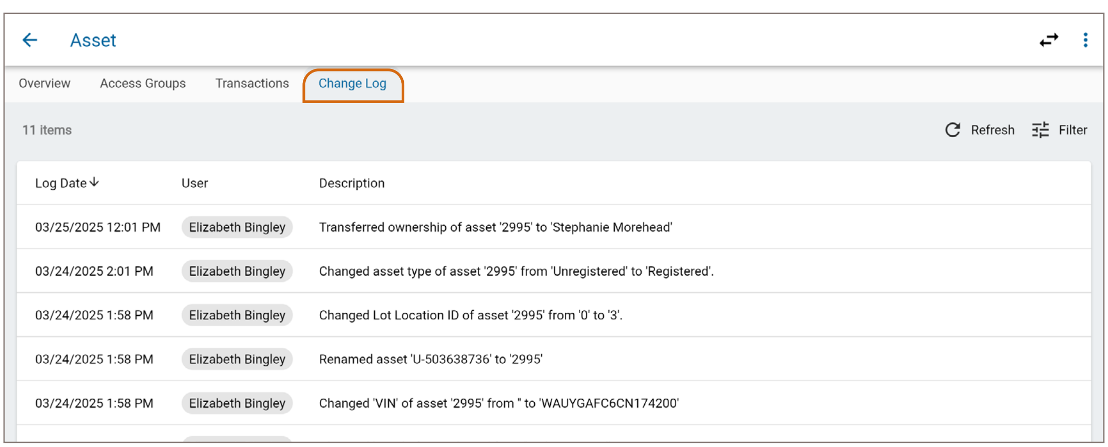


*Fig. 184 – The Change Log tab of the Asset details screen*

### 5.5 *Quick action menu*

Selecting **menu** ⋮ from any of the tabs on the Asset details screen opens the **quick action menu**, as shown in ***Fig. 185***. The quick actions you can take are as follows:

1. **Share**: Select to copy a link to the asset record to your clipboard. This link may be shared with other users of KEYper GO KEYper GO Web.
2. **Transfer to Me / Transfer to Someone Else** (if checked out): Select to open the **Transfer** screen. See **Transfer** for further information.
3. **Create Reservation** (if checked in): Select to open the **Create Reservation** screen. See **Add reservations** for further information.
4. **Attach / Detach Fob**: Select to attach a fob (if there is not one currently attached) or detach a fob (if there is one attached that you want to remove). See **Fob labeling** for further information.
5. **Edit**: Select to open the **Edit Asset** screen. See **Asset details screen** for further information.
6. **Delete**: Select to delete the asset. This function is only available to admins.

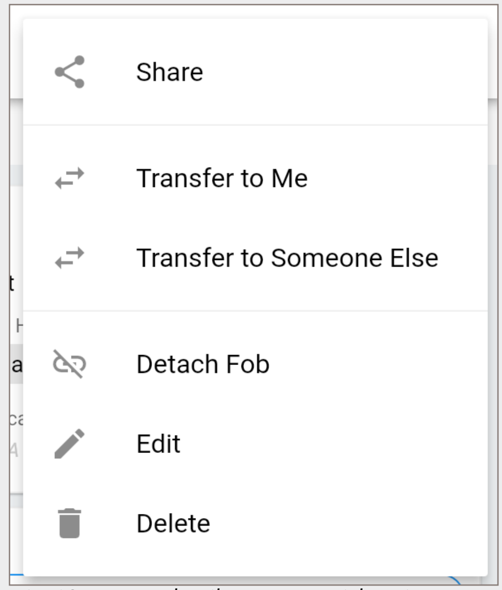

*Fig. 185 – Asset details screen – quick action menu*

# Equipment

The **Equipment** screen shows your active KEYper equipment, including your cabinets, systems, and fobs, as shown in *Fig. 186* and *Fig. 187*.

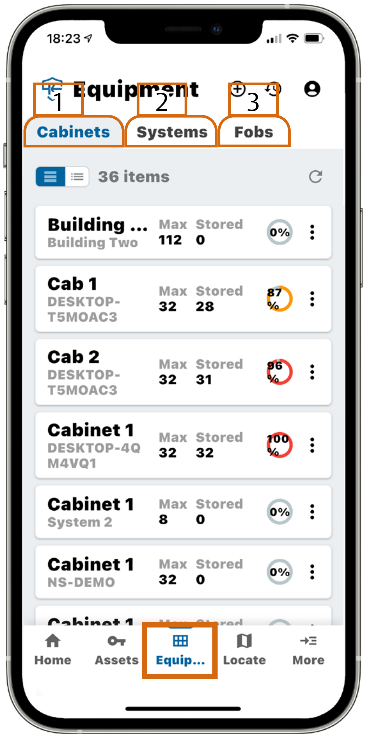


*Fig. 186 – The default view of the Equipment screen (KEYper GO)*

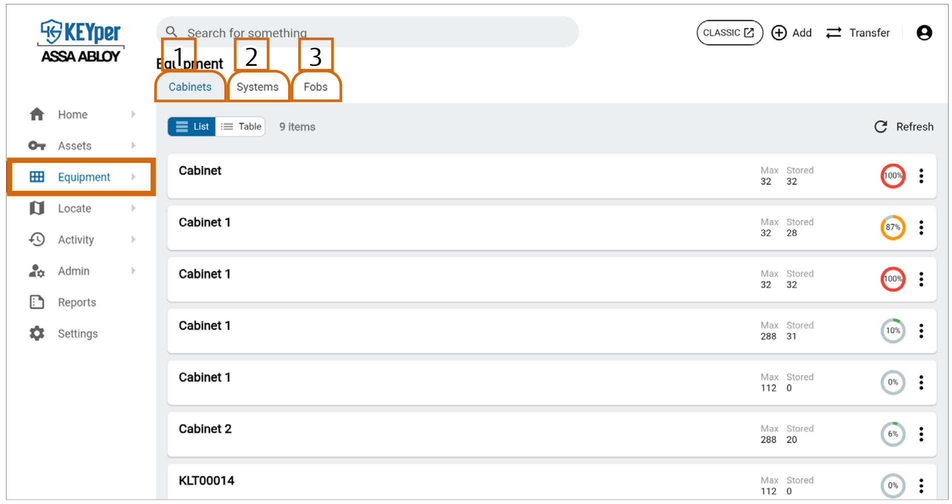


*Fig. 187 – The default view of the Equipment screen (KEYper GO Web)*

The **Equipment** screen is organized as follows:

1. **Cabinets tab**
2. **Systems tab**
3. **Fobs tab**

## 1. Cabinets tab

The **Cabinets** tab, shown in ***Fig. 188***, provides an at-a-glance overview of the active cabinets in your system(s). The default display is the list view, which continually loads more cards as you scroll. Table view provides the same information as list view, though the cards are loaded into pages of 40 cards each. Additionally, in table view, the columns are sortable by name, system, maximum asset capacity, and number of assets stored.

The information displayed in the **Cabinets** tab is as follows:

1. **Cabinet name**: The name of the cabinet is displayed in bold type on the leftmost side of the card.
2. **Max**: The maximum number of assets that the cabinet can hold. This number is static and is set during the commissioning of your system.
3. **Stored**: The number of assets that are currently checked into the cabinet. This number changes according to user activity.
4. **Percentage full**: The colored circles reveal at a glance how close to capacity the cabinet currently is based on percentage.
5. Select **menu** ⋮ or anywhere on a card to open the Socket Map shown in ***Fig. 189***.

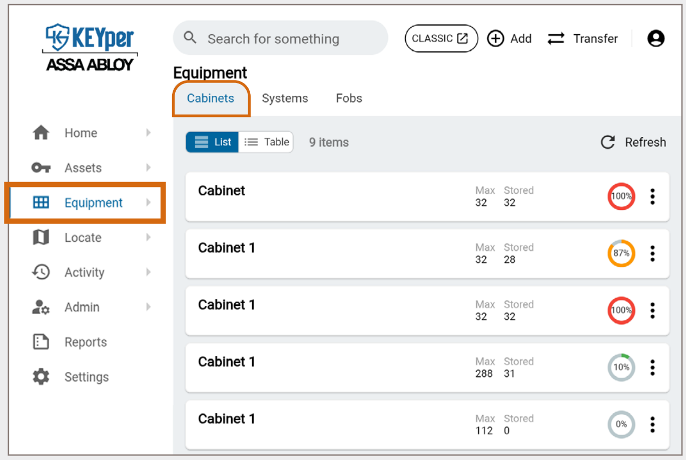

*Fig. 188 – Equipment screen – Cabinets tab*

### *1.1 Socket map*

The socket map provides a visual representation of the fobs inserted into the sockets in your cabinet, as shown in ***Fig. 189***. The information displayed is as follows:

1. indicates that an asset of the type shown (key, spare key, or dealer plate) is checked into that position in the cabinet.
   - The name of the asset is displayed below the socket.
2. indicates that the type of asset shown (key, spare key, or dealer plate) was last checked out of that position. The socket is empty.
   - The name of the asset is displayed below the socket.
3. indicates that the type of asset shown (key, spare key, or dealer plate) was last checked out of that position and the asset is overdue. The socket is empty.
   - The name of the asset is displayed below the socket.
4. indicates that no fob is inserted in that position. The socket is empty.
5. Select a **socket** with a named asset to open the Asset details screen. See **Asset details screen**.
6. Select the **back arrow** to return to the previous screen.

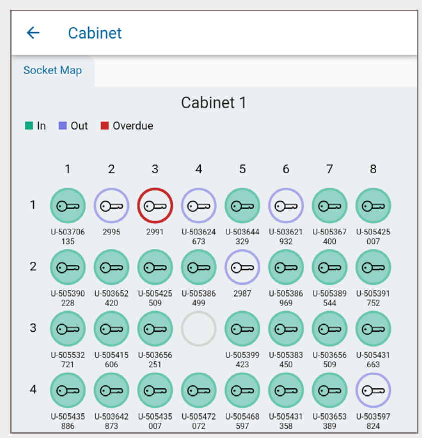

*Fig. 189 – Cabinet Socket Map screen*

## 2. Systems tab

The **Systems** tab, shown in ***Fig. 190***, provides an at-a-glance overview of your active system(s). The default display is the list view, which continually loads more cards as you scroll. Table view provides the same information as list view, though the cards are loaded into pages of 40 cards each. Additionally, in table view, the columns are sortable by name, number of cabinets in each system, maximum asset capacity, and number of assets stored.

The information displayed in the **Systems** tab is as follows:

1. **Status**: The current status of the system's connectivity to the server.
   - indicates the system is online.
   - indicates the system is offline.
   - indicates there is no recent information for the system's status or that it is not connected to the server.
2. **System name**: The name of the system is displayed in bold type on the leftmost side of the card.
3. **Max**: The maximum number of assets that the cabinet(s) in the system can hold. This number is static and is set during the commissioning of your system.
4. **Stored**: The number of assets that are currently checked into the cabinet(s) in the system. This number changes according to user activity.
5. **Percentage full**: The colored circles reveal at a glance how close to capacity the cabinet currently is based on percentage.
6. Select **menu** or anywhere on a card to open the System details screen shown in ***Fig. 191***.

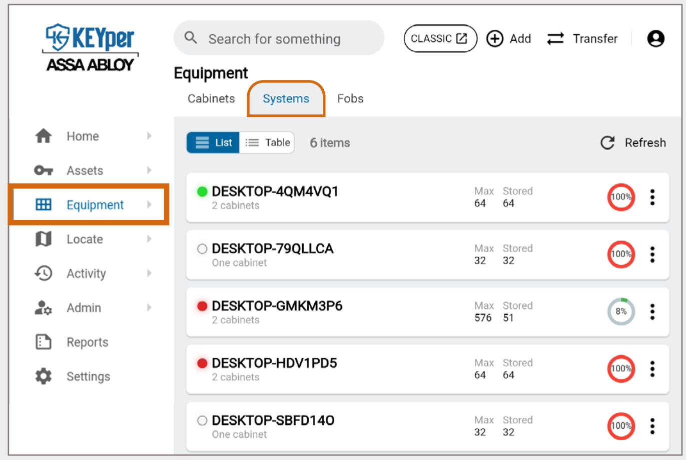


*Fig. 190 – Equipment screen – Cabinets tab*

### 2.1 System details screen

When you select a system card, you are taken to the System details screen **Overview** tab, as shown in ***Fig. 191***. From here, you can view information about the system, such as the name and status of the system and the cabinets within the system. The **Transactions** tab displays information about the recent transactions at each of the cabinets within the system.

#### 2.1.1 Overview tab

Information displayed on the **Overview** tab of the System details screen is as follows:

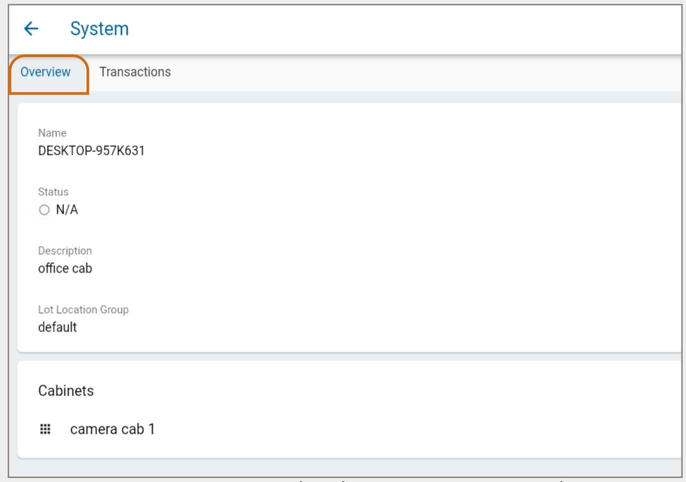


*Fig. 191 – System details screen – Overview tab*

1. **Name**: The name of the system.
2. **Status**: The current status of the system
   - Online The system is connected and working as expected.
   - Offline The system is disconnected. It is either powered off or experiencing an error. The length of time that the system has been offline is displayed.
   - N/A No information is currently available about the status of this system. It either has not been connected to the server or it is a semi-electronic KEYper LT cabinet, which does not connect to the server.
3. **Description**: An optional description for the system, such as its location or building number.
4. **Lot Location Group:** The system's assigned lot location group. See **Settings** .
5. **Cabinets**: A list of all cabinets contained within the system.
   - Select the name of a cabinet to open the socket map for that cabinet. See **Socket map**.
6. Select the **Transactions** tab to open the transactions screen for the cabinet(s) within the system, shown in ***Fig. 192***.

### *2.1.2 Transactions tab*

Transactions at each of the system's cabinets are displayed in a table view with 100 entries per page, as shown in ***Fig. 192***. Each of the columns on the screen can be sorted to better view specific information as needed. Information displayed on the **Transactions** tab of the system details screen is as follows:

1. **When**: Indicates the date and time when the transaction took place. By default, transactions are sorted by date and time with the most recent transaction first.
   - Select to change to ascending order, with the transactions farthest in the past displayed first.
2. **Asset Name**: Indicates the name of the asset involved in the transaction.
   - Select to order transactions according to the name of the asset. Click or tap once for descending order (A-Z). Click or tap twice for ascending order (Z-A).
   - Select an asset to open the **Asset details screen**.
3. **Direction**: Indicates whether the transaction was a check-in or check-out.
   - Select to order transactions according to direction.
4. **User**: Indicates the name of the user that initiated the transaction.
   - Select to order transactions according to the name of the user. Click or tap once for descending order (A-Z). Click or tap twice for ascending order (Z-A).
   - Select a user to open the **User details screen**.

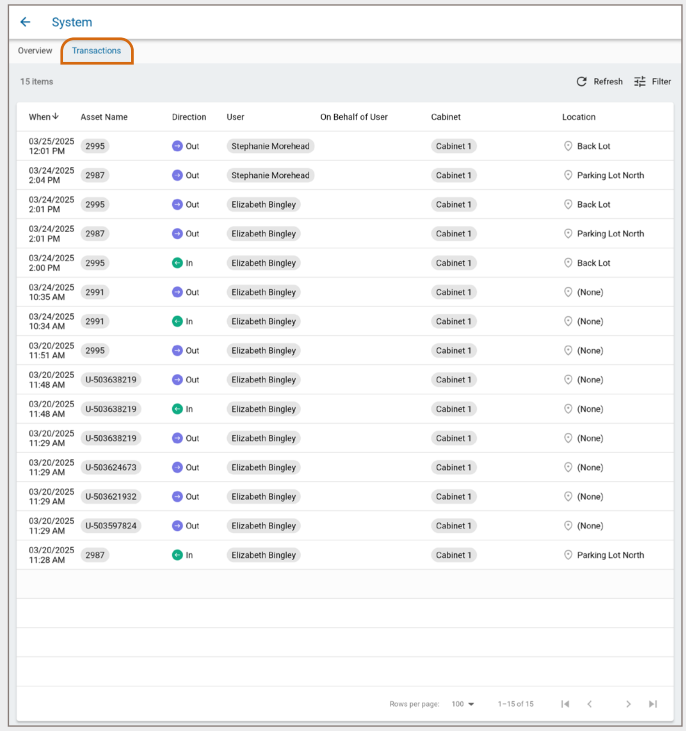


*Fig. 192 – System details screen – Transactions tab*

5. **On Behalf of User**: If the person named in the User column initiated the transfer of an asset on behalf of another user, their name appears in this column. See **Add user** for further information about user permissions.
   - Select to order transactions according to the name of the user who actually received the asset, if it applies. Click or tap once for descending order (A-Z). Click twice for ascending order (Z-A).
6. **Cabinet**: Indicates the name of the cabinet where the transaction took place.
   - Select to order transactions according to the name of the cabinet. Click once for descending order (A-Z). Click or tap twice for ascending order (Z-A).
   - Select a cabinet to open the **Socket map**.
7. **Location**: Indicates the name of the lot (if **Lot Location** is enabled) or the parking space (if **Lot Blocking** is enabled) where the vehicle is parked. For more information on **Lot Location** and **Lot Blocking**, see the **Electronic System Manual**.
   - Select to order transactions according to the location of the vehicle. Click or tap once for descending order (A-Z). Click or tap twice for ascending order (Z-A).
8. **Refresh**: Select **Refresh** to refresh the list of transactions and show any new transactions in real time.
9. **Filter**: Select **Filter** to filter results by a specific date range, cabinet, status, user, or lot location.
10. Select the **back arrow** to return to the previous screen.

## 3. Fobs tab

The **Fobs** tab, shown in ***Fig. 193***, provides an at-a-glance overview of all the fobs in your database, regardless of which cabinet or system they are housed. The default display is the list view , which continually loads more cards as you scroll. Table view provides the same information as list view, though the cards are loaded into pages of 100 cards each. Additionally, in table view, the columns are sortable by fob type, fob number, tag number, and asset name.

The information displayed in the **Fobs** tab is as follows:

1. **Tag number**: Select to open the Fob details screen. See **Fob labeling** for further information.
   - indicates that there is no Smart Tag assigned to the fob.
   - 9876 indicates the number of the Smart Tag assigned to the fob.
2. **Fob number**: The fob number is displayed in bold type.
3. **Fob type**: The type of fob is displayed under the fob number.
   - Original: A standard non-lock-in Sturdifob, used in MX, HS, MD, and MI systems, or a standard lock-in iFob, used in MXi and MI systems.
   - HC: A specialized SmartFob exclusively for the Residential industry, used in HC systems.
   - NFC: An NFC-enabled, all-in-one fob and Smart Tag exclusively used in LT systems.

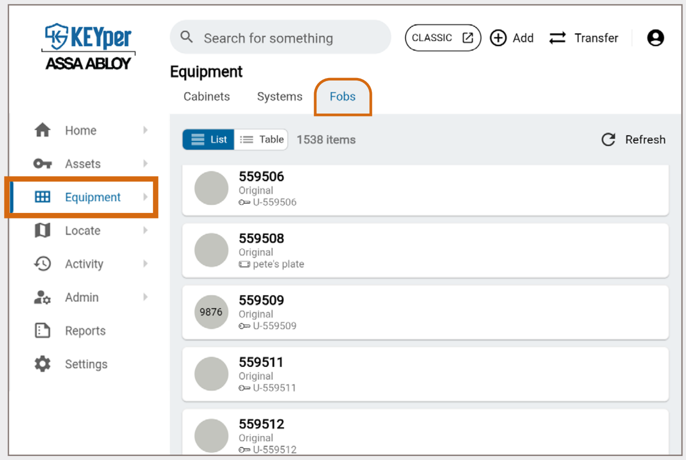


*Fig. 193 – Equipment screen – Fobs tab*

4. **Asset type and name**: An icon indicates the type of asset assigned to the fob, if any. The text indicates the name of the asset assigned to the fob.
   - indicates the asset is a key.
   - indicates the asset is a spare key.
   - indicates the asset is a dealer plate.

# Locate

The **Locate** screen, shown in ***Fig. 194*** and ***Fig. 195***, helps you keep track of the location of assets as well as inventory scan sessions.

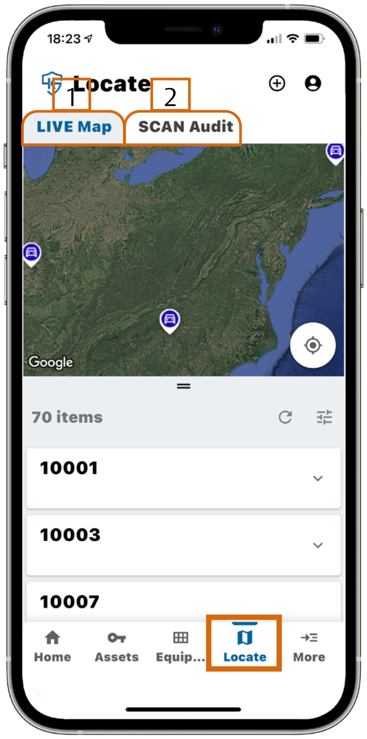


*Fig. 194 – The default view of the Locate screen (KEYper GO)*

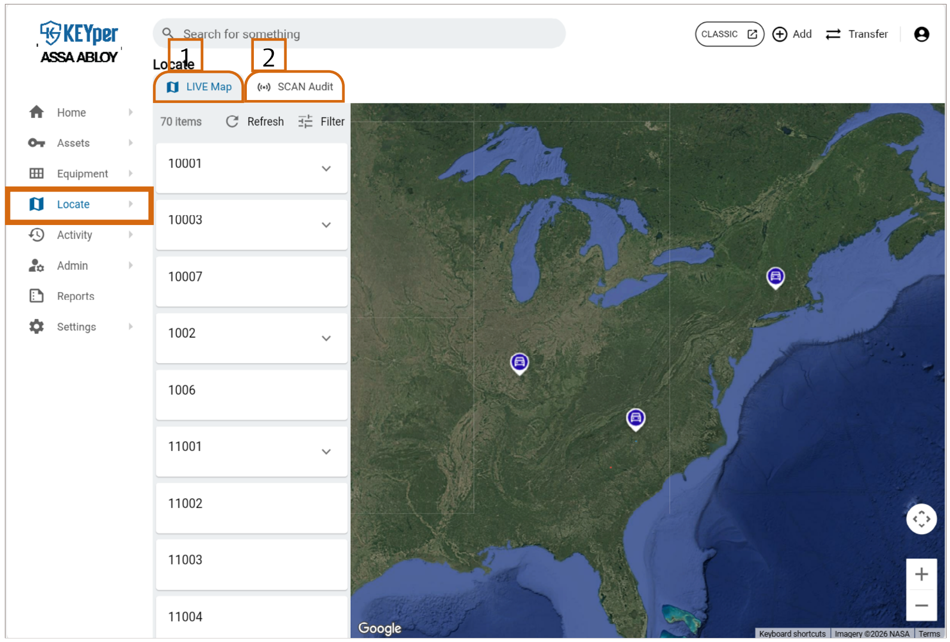


*Fig. 195 – The default view of the Locate screen (KEYper GO Web)*

The **Locate** screen is organized as follows:

1. LIVE Map tab
2. SCAN Audit tab

## 1. LIVE Map tab

The **LIVE Map** tab, as shown in ***Fig. 196***, provides the ability to see the location of your vehicles represented on a map.

***Note: Lot Location** must be enabled to use this feature. For more information, contact Support.*

The layout of the **LIVE Map** tab is as follows:

1. **Asset Name:** The Asset Name is displayed for each asset in the list.

   ***Note:** If certain asset attributes (i.e., Make, Model, and Type) have been provided for the vehicle, those display as well.*

2. **Parking Location:** If a GPS location has been specified for the vehicle using KEYper GO (see **Asset details screen**), then a dropdown icon displays that you can select to reveal the **Parking Location** button. Select the **Parking Location** button to jump to the vehicle's location on the map, which is indicated by a pin.

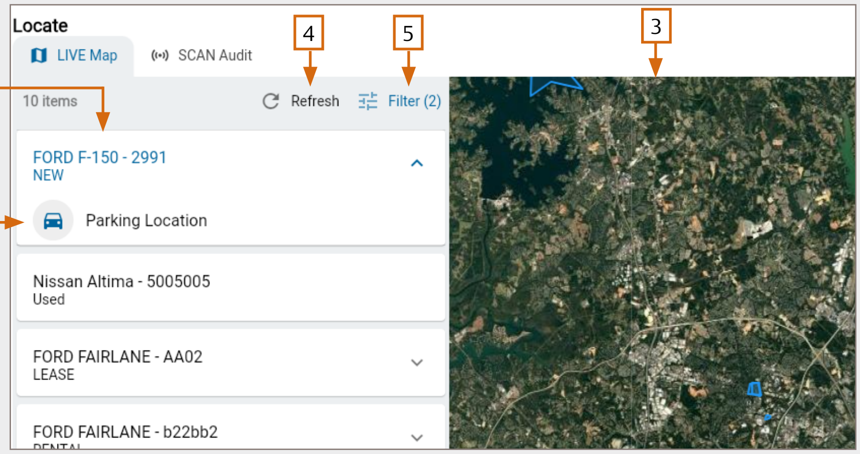


*Fig. 196 – Locate screen - LIVE Map tab*

3. **Map:** On the map, you will see the following:
   - **Pins:** The map displays vehicle locations indicated by pins, as shown in ***Fig. 196***. When you select a pin, a menu appears that allows you to view asset details (see **Asset details screen**) or return to the **LIVE Map** tab. To have a pin on the map, a vehicle must have a GPS location. For instructions on how to add a GPS location, see **Lot Location**.
   - **Zones:** A zone shows the boundaries of a lot location, as shown in ***Fig. 197***. Zones must be configured in **Settings**.
4. **Refresh:** Select **Refresh** to pull the latest location of each vehicle and update the map.
5. **Filter:** Select **Filter** to narrow down the vehicles displayed in the list and on the map. You may filter vehicles by what system or cabinet the vehicle's key is in, the asset's status, and asset attributes. Changes to filters will reposition the map to ensure all pins are in frame.

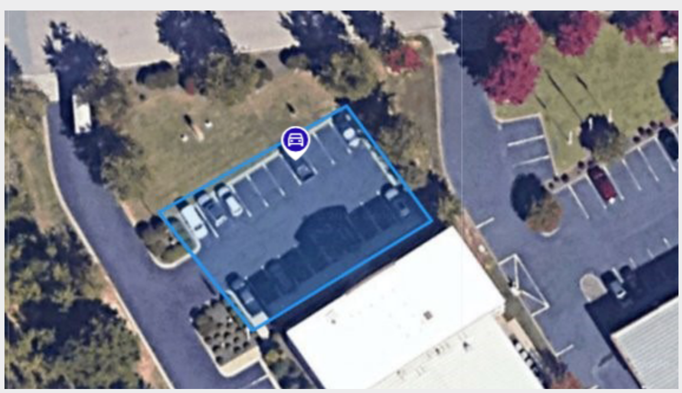

*Fig. 197 – Vehicle pin inside a zone*

## 2. SCAN Audit tab

The **SCAN Audit** tab, as shown in ***Fig. 198***, shows the inventory scan sessions created for your system(s). Inventory scan sessions make it easy to take inventory of vehicles on your lot. Simply scan each asset label to efficiently locate and verify assets. You may perform a scan of all or a subset of the assets in your inventory, such as the vehicles in your pre-owned car lot. For instructions on creating and completing inventory scan sessions, see **Add inventory scan** and **Complete an inventory scan session**.

***Note****: It is possible to create an inventory scan session in KEYper GO and KEYper GO Web. However, to begin the session by scanning assets labels, you must use KEYper GO.*

### *2.1 List view*

The default display is the list view, which continually loads more cards as you scroll. Selecting a session from the list will bring you to the **Scan** screen, which has additional details about the session. See **Inventory scan session details**. The layout of the **SCAN Audit** tab list view is as follows:

1. **Inventory scan session name:** Each inventory scan session has its own card with its name in bold.
2. **Inventory scan session notes:** If provided, notes for the inventory scan session are displayed below the inventory scan session's name.
3. **Inventory scan session status:** A status displays for each inventory scan session in the list as follows:
   - indicates that the inventory scan session has not started.
   - indicates that the inventory scan session is in progress.
   - indicates the inventory scan session is finished.
4. **Refresh:** Select **Refresh** to update the list of inventory scans.
5. **Quick action menu:** Select **menu** to open the **quick action menu**, which allows you to view or delete inventory scan sessions.

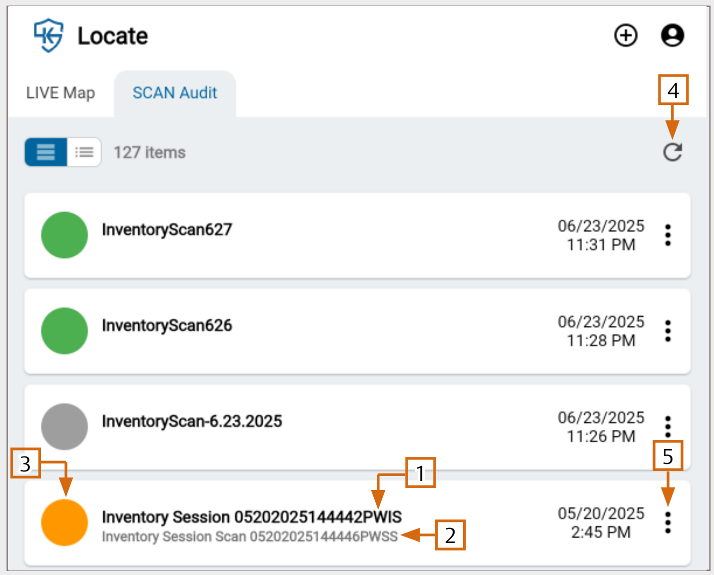


*Fig. 198 – Locate screen – SCAN Audit tab – List view*

***Notes:***

- *Alternately, you may view an inventory scan session by selecting its card in the list.*
- *If you choose to delete an inventory scan session, you will be asked to confirm you wish to delete the inventory scan session by selecting **Delete** again. Otherwise, you can select **Cancel** to return to the **SCAN Audit** screen.*

## 2.2 *Table view*

To organize the inventory scan sessions in a table, select the **Table** button at the top of the screen. Selecting a session from the table will bring you to the **Scan** screen, which has additional details about the session. See **Inventory scan session details**.

The layout of the **SCAN Audit** tab table view, shown in ***Fig. 199***, is as follows:

1. **Status:** This column displays whether the inventory scan sessions have been created, are in progress, or are finished. Selecting this column will sort the inventory scan sessions by status.
2. **Name:** This column displays the name of the inventory scan sessions. Selecting this column will display the inventory scan sessions in alphabetical order.
3. **Started:** This column displays the dates and times the inventory scan sessions were created. Selecting this column will sort the inventory scan sessions by date.
4. **Refresh:** Select **Refresh** to update the table.

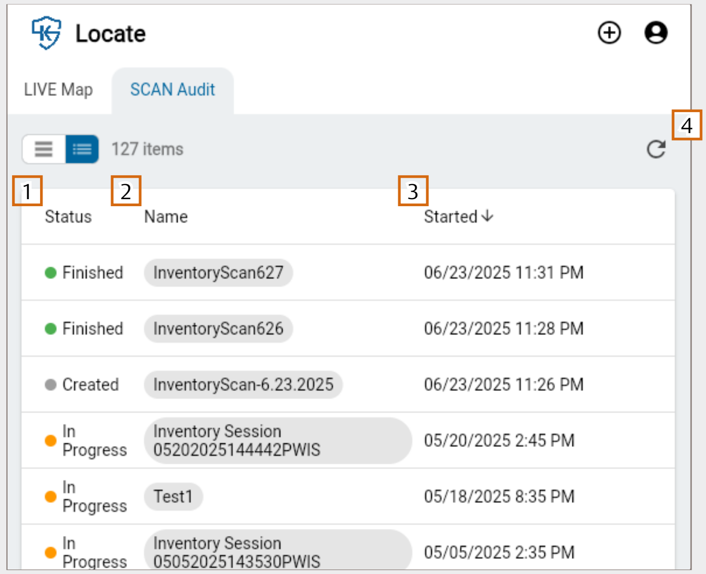


*Fig. 199 – Locate screen – SCAN Audit tab – Table view*

### 2.3 *Inventory scan session details*

If you select an inventory scan session record from the table or list view, the details of the inventory scan session display on the **Scan** screen, as shown in ***Fig. 200***.

The layout of the **Scan** screen is as follows:

1. **Name:** Displays the name of the inventory scan session.
2. **Notes:** If notes were provided when creating the inventory scan session, they are displayed here.
3. **Created:** The date and time that the inventory scan session was created.
4. **Ended:** The date and time that the inventory scan session finished. If the inventory scan session is not finished, this reads ***N/A***.
5. **Status:** Displays whether the inventory scan session has been created, is in progress, or is finished.
6. **Systems:** The system(s) selected for the inventory scan session.
7. **SCAN Audit:** A list of the vehicles that are a part of the inventory scan session. Scanned vehicles appear at the top of the list along with the date and time that they were scanned. Unscanned vehicles appear at the bottom. Each vehicle has one of the following statuses:

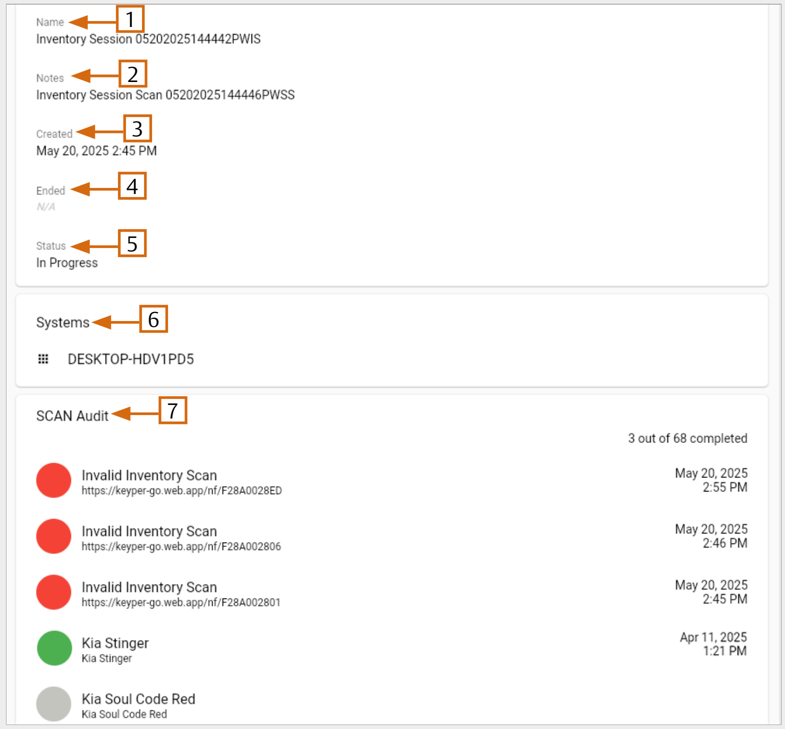


*Fig. 200 – Scan screen with inventory scan session details*

- The vehicle was successfully scanned.
- An invalid vehicle (e.g., a vehicle not a part of the inventory scan) was scanned. The vehicle's scan record will also read "Invalid Inventory Scan."
- The vehicle has not been scanned.

## Activity

You can use the **Activity** feature in both KEYper GO and KEYper GO Web to track events occurring in your system(s). Activity is available to full users and admins; however, full users only see events related to the assets or systems they have access to through their assigned access groups.

In KEYper GO, you can view activity by tapping the **Activity** button at the top of the screen, as shown in **Navigation**, and choosing either the **History** screen or the **Change Log** screen, as shown in ***Fig. 201***.

In KEYper GO Web, you access activity differently. Click the **Activity** option in the navigation menu, as shown in ***Fig. 202***. From there, you can select the **History** tab or the **Change Log** tab.

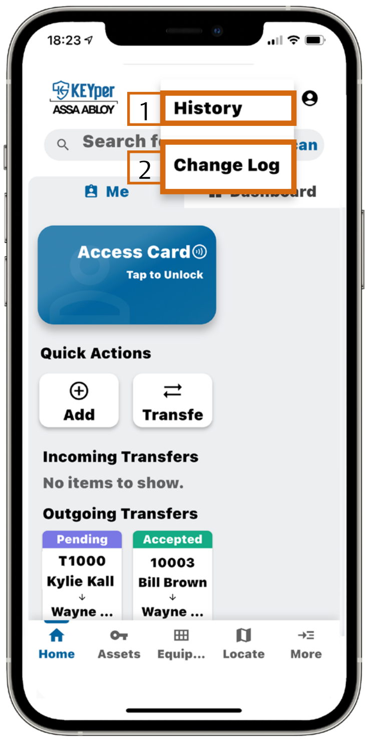


*Fig. 201 – Choose whether to view the History screen or Change Log screen (KEYper GO)*

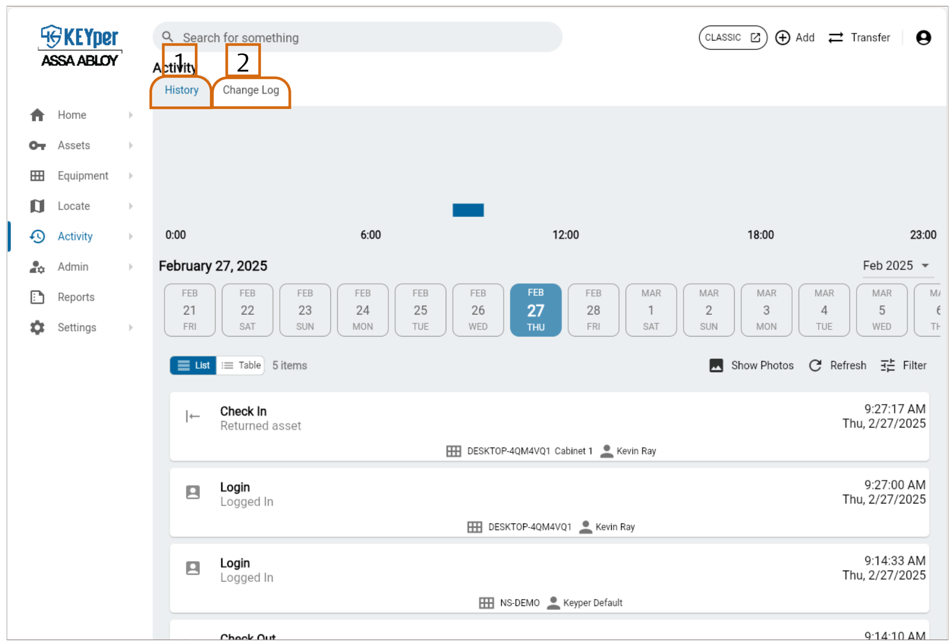


*Fig. 202 – The default view of the Activity screen*

## 1. History

The **History** screen (KEYper GO) or tab (KEYper GO Web) displays events that occurs at your system(s), such as the following:

- Login
- Logout
- Login failure
- Login time exceeded
- Login rejected
- Check-in
- Check-out
- Lot location entered
- Parking space entered
- Process step entered
- Issue reason entered
- Ownership transfer
- Identify asset
- Identify fob
- Illegal fob removal
- Illegal fob opening
- Access denied
- Power loss
- Communication loss
- Exit application
- Attached
- Detached

### *1.1 List view*

The default display is the list view, shown in ***Fig. 203*** and ***Fig. 204***, which continually loads more cards as you scroll.

The layout of the **History** list view is as follows:

1. **Chart:** The bar chart at the top of the **History** list view displays the total asset transactions (e.g., check-in/check-out) in blue for every hour of the day. Selecting a bar shows you the exact number of transactions that occurred.
2. **Date selector timeline:** The date selector timeline allows you to show the events that occurred on a specific day. Change the date by choosing the month and year from the dropdown menu and then selecting the desired date from the timeline. The selected date will be highlighted in blue.
3. **List/Table view:** Select to switch between displaying the history as a list or as a table.
4. **Event:** Each event has its own card in the list. The following information is displayed for each event:
   a) **Image/Icon:** The photo that the KEYper cabinet took during the event (e.g., login) is displayed here. If photos have been toggled off or a photo was not taken for an event, an icon displays instead.
   b) **Event Type:** The type of event that occurred (e.g., login, check-out, etc.).
   c) **Event Detail:** A description of the event that occurred. For example, the event details for check-in are "returned asset."
   d) **System:** The system affected by the event.
   e) **Cabinet:** The cabinet affected by the event (if available).
   f) **User:** The user responsible for the event (if available).
5. **Show Photos:** Select **Show Photos** to turn photo visibility on and off.
6. **Refresh:** Select **Refresh** to update the list with the latest events.
7. **Filter:** Select **Filter** to filter the list by systems, cabinets, event types, users, and whether or not the event includes a photo.

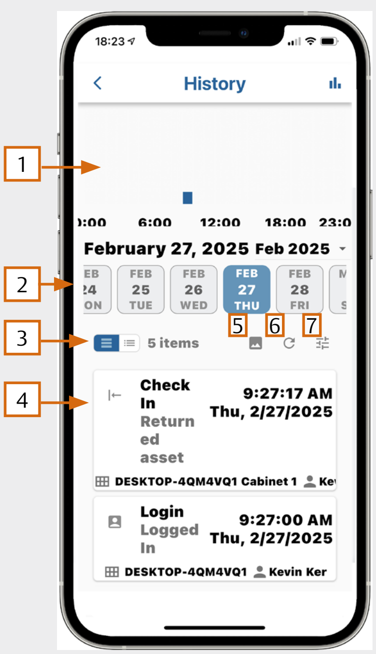


*Fig. 203 – History screen (KEYper GO)*

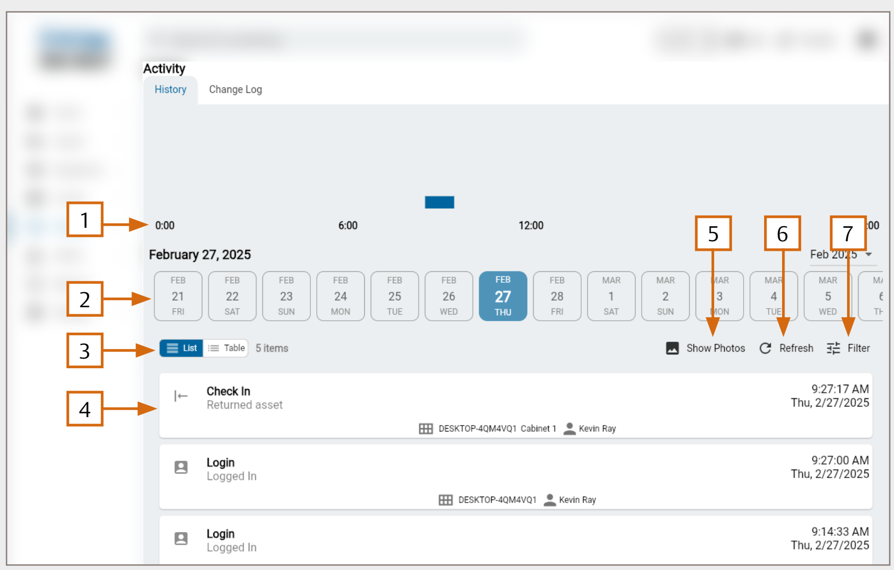


*Fig. 204 – Activity screen — History tab*

## 1.2 Table view

You can display the list of events that occur at your system(s) in a table by selecting the **Table** button .

The layout of the **History** table view, shown in ***Fig. 205***, is as follows:

1. **Chart:** The bar chart at the top of the **History** list view displays the total asset transactions (e.g., check-in/check-out) in blue for every hour of the day. Hovering over a bar shows you the exact number of transactions that occurred.
2. **Timeline:** Allows you to show the events that occurred on a specific day. Change the date by choosing the month and year from the dropdown menu and then selecting the desired date from the timeline.
3. **List/Table view:** Select to switch between displaying the history as a list or as a table.

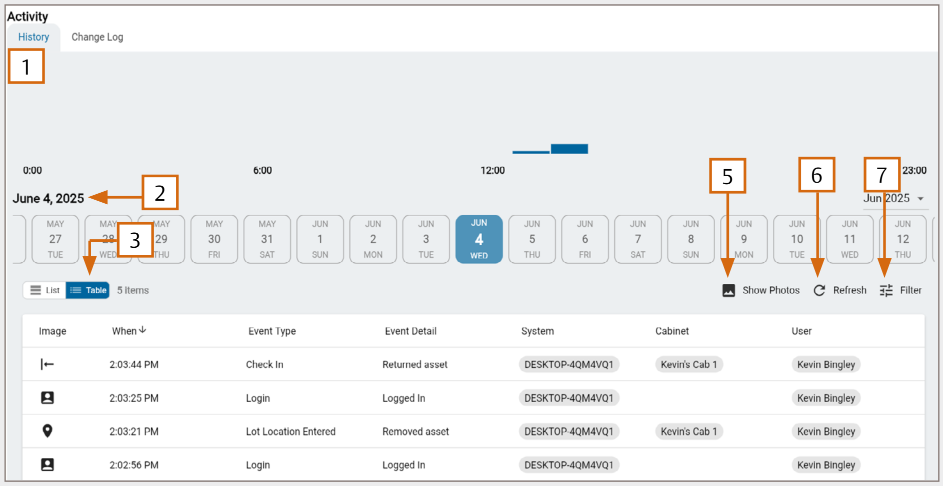


*Fig. 205 – Activity screen – History tab (table view)*

4. **Event:** Each event has its own row in the table. The following information is displayed for each event:
   a) **Image/Icon:** The photo that the KEYper cabinet took during the event (e.g., login) is displayed here. If photos have been toggled off or a photo was not taken for an event, an icon displays instead.
   b) **When:** The time the event occurred.
   c) **Event Type:** The type of event that occurred (e.g., login, check-out, etc.).
   d) **Event Detail:** A description of the event that occurred. For example, the event details for check-in are "returned asset."
   e) **System:** The system affected by the event. Selecting the system opens the System details screen.
   f) **Cabinet:** The cabinet affected by the event (if available). Selecting the cabinet opens the Socket Map (see **Socket map**).
   g) **User:** The user responsible for the event (if available). Selecting the user opens the **User** screen.
5. **Show Photos:** Select **Show Photos** to turn photo visibility on and off.
6. **Refresh:** Select **Refresh** to update the table with the latest events.
7. **Filter:** Select **Filter** to filter the table by systems, cabinets, event types, users, and whether or not the event includes a photo.

## 2. Change Log

The **Change Log** tab shows the changes made to assets, fobs, users, and access groups on a specific day.

The layout of the **Change Log tab**, shown in ***Fig. 206*** and ***Fig. 207*** is as follows:

1. **Timeline:** Allows you to show the changes that occurred on a specific day. Change the date by choosing the month and year from the dropdown menu and then selecting the desired date from the timeline.
2. **Change:** Each change has its own row in the change log. The following information is displayed for each change:
   a) **Log Date:** The date and time the change was made.
   b) **Type:** The type of change that was made, including Asset, Fob, User, and User Access Group.
   c) **Item:** Links to the asset, fob, user, or user access group that was changed.
   d) **Actionee:** The user responsible for the event (if available). Selecting the user opens the User details screen.
   e) **Description:** A description of the change made.
3. **Refresh:** Select **Refresh** ⟳ to update the change log with the latest changes.
4. **Filter:** Select **Filter** to filter the change log by type (i.e., Asset, Fob, User, and User Access Group).

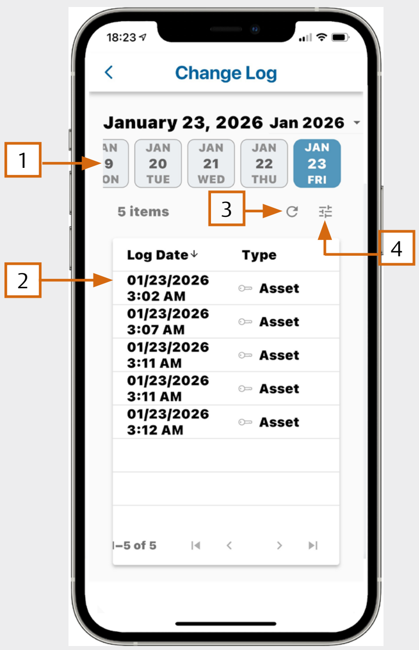


*Fig. 206 – Activity screen – Change Log (KEYper GO)*

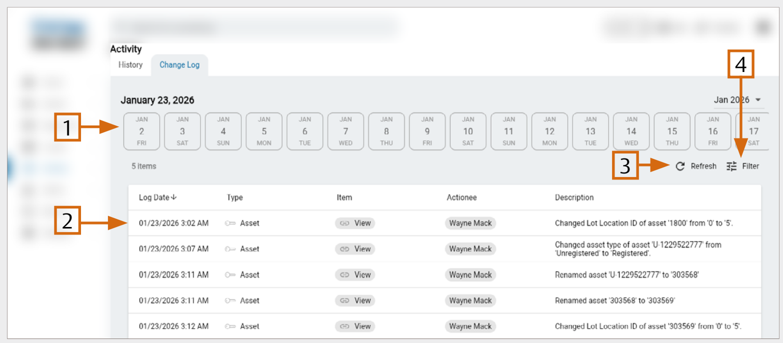


*Fig. 207 – Activity screen – Change Log tab (KEYper GO Web)*

# Admin

The **Admin** screen, is only available to admins. From here, admins may access and edit the full list of registered users and all access groups.

In KEYper GO, the **Admin** screen is accessible from the **Admin** option in the **More** menu, shown in ***Fig. 208***. In KEYper GO Web, the **Admin** screen is accessible from the **Admin** option in the navigation menu, shown in ***Fig. 209***.

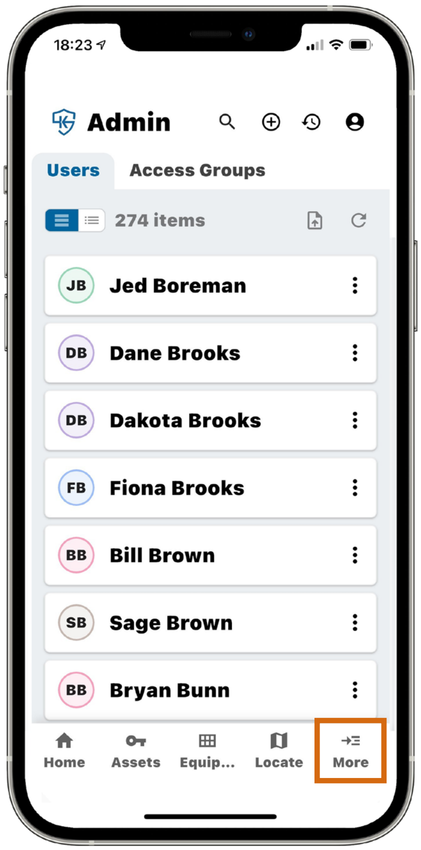


*Fig. 208 – Admin screen with More option indicated (KEYper GO)*

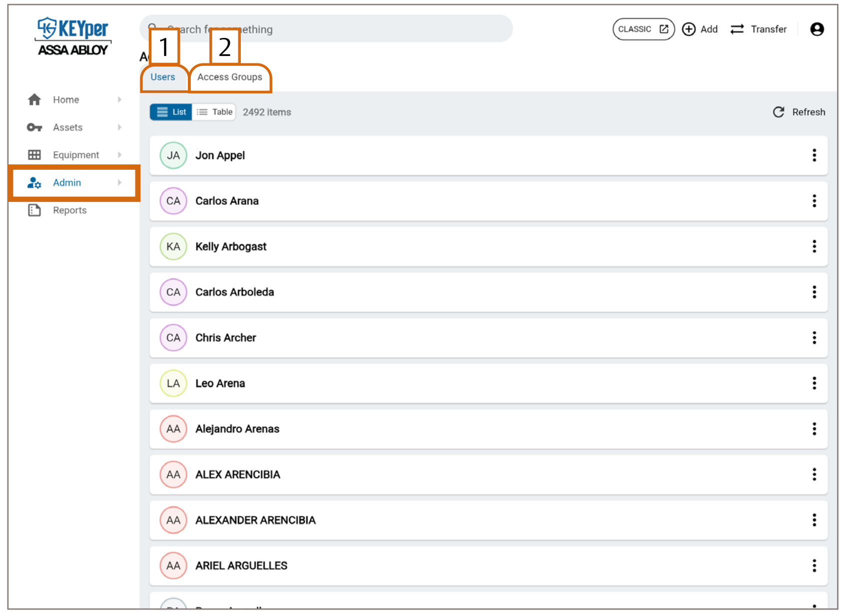


*Fig. 209 – The default view of the Admin screen (KEYper GO Web)*

The **Admin** screen is organized as follows:

1. **Users tab**
2. **Access Groups tab**

# 1. Users tab

The **Users** tab, shown in ***Fig. 210***, provides an at-a-glance overview of the active users in your database. From here, admins may edit and delete users. To add new users, see **Add user**.

## *1.1 List view*

The default display is the list view, which continually loads more cards as you scroll.

The information displayed in the list view of the **Users** tab is as follows:

1. **User initials**: The user's initials are displayed in a colored circle. Though users are sorted by last name by default, the initials are colored according to first name.
2. **User name**: The user's name is displayed in bold type, sorted A-Z by last name.
3. **Quick action menu**: Select **menu** ⋮ to open the **quick action menu** shown in ***Fig. 211***.

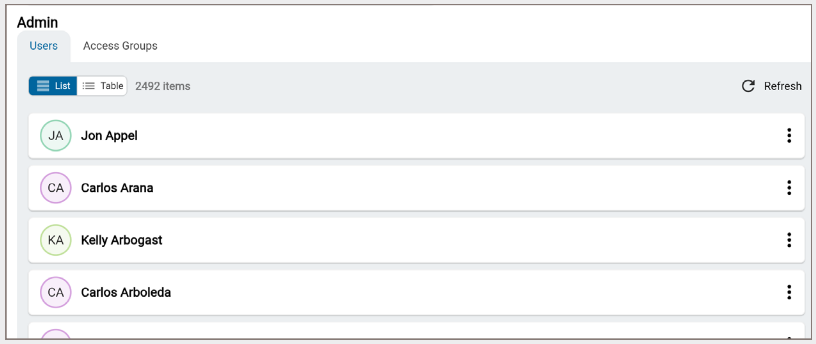


*Fig. 210 – Admin screen – Users tab – list view*

## *1.2 Users quick action menu*

Selecting **menu** ⋮ on the **Users** tab of the **Admin** screen opens the **quick action menu**, as shown in ***Fig. 211***.

The quick actions you can take are as follows:

1. **View**: Select to open the **User details screen**.
2. **Share**: Select to copy a link to the user record to your clipboard. This link may be shared with other users of KEYper GO Web.
3. **Edit**: Select to open the Edit User screen. See **User details screen** for further information.
4. **Delete**: Select to delete the user. To delete multiple users at a time, see **Table view**.

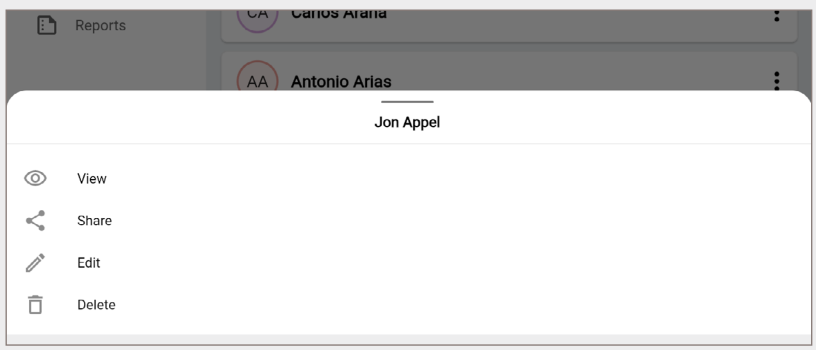


*Fig. 211 – Admins screen – Users tab – quick action menu*

### 1.3 Table view

To organize your users into a table view, select the **Table** button at the top of the screen. Users are arranged into pages of 100 records each, shown in ***Fig. 212***. Navigate the pages by using the arrows at the bottom of the screen. Each column can be sorted into ascending or descending order.

The information displayed in the table view of the **Users** tab includes the following:

1. **First Name**: The user's first name is displayed within a gray bubble.
   - Select to open the **User details screen**.
2. **Last Name**: The user's last name is displayed within a gray bubble. Users are sorted by last name by default, ascending A-Z.
   - Select to open the **User details screen**.
3. **Description**: The user's optional description is displayed.

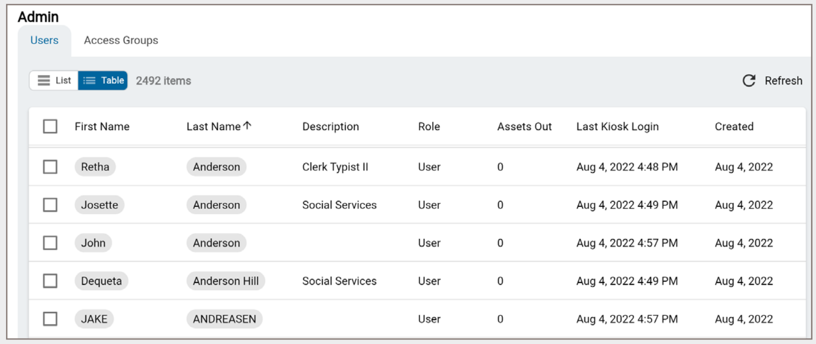


*Fig. 212 – Admin screen – Users tab – table view*

4. **Role**: Either **User** or **Admin**.
   - The specifics of the user's level of permissions at the cabinet, on KEYper GO and KEYper GO Web, and on the classic Web Admin is determined by their role, chosen during user registration. See **Add user**.
5. **Assets Out**: The number of assets the user currently has checked out.
6. **Last Kiosk Login**: The date and time of the user's last login at the kiosk cabinet is displayed.
7. **Created**: The date that this user was registered.
8. **Refresh**: Select **Refresh** to refresh the user list to show new changes.
9. To delete a user, select the checkbox next to their name. To delete multiple users at once, select the checkboxes for each user you want to remove.
   - Select **Delete** to select the user(s) or **Cancel** to clear the selection. These buttons appear in place of **Import** and **Refresh** after selecting one or more boxes.

## 1.4 Import users

It is possible to import a group or list of users into KEYper GO and KEYper GO Web. Except for biometric registration, this process eliminates the need to individually add users to the system.

In order for the users to be imported, the following requirements must be met:

- You must create a CSV file containing the information for the users you wish to import.
- The user information in the CSV file must be in the format described below. The easiest way to create a CSV file is by using Excel, but other methods are acceptable.

To import users in KEYper GO and KEYper GO Web, do the following:

1. Log in to KEYper GO or KEYper GO Web.
2. Select **Admin**.
3. On the **Users** tab of the **Admin** screen, select **Import**, as shown in *Fig. 213*.
4. Create a CSV file with the information for the users you wish to import.
   - Each user that you wish to import should have a row formatted as follows (* indicates required information):
     - **First Name:*** The user's first name.
     - **Last Name:*** The user's last name.
     - **Description**: The user's job title.
     - **PIN**: A four-digit PIN the user can use to log in to the kiosk application.

*__Note__: A PIN must not be a continuous sequence (e.g., "1234" or "4321").*

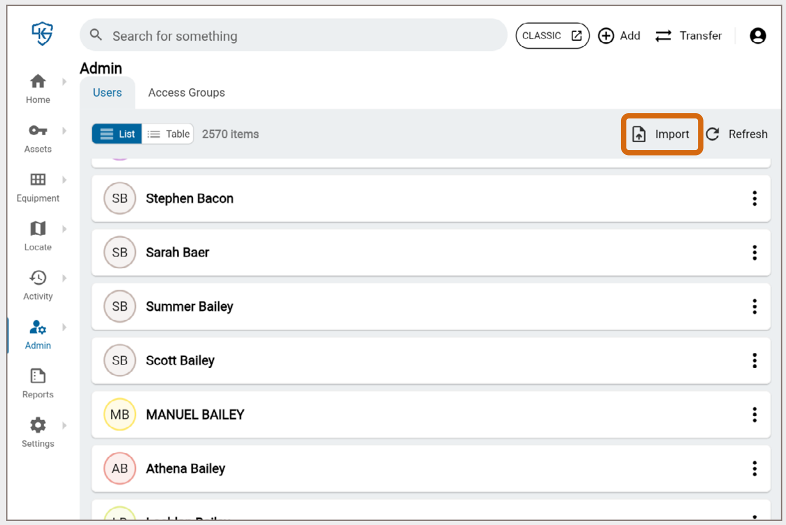


*Fig. 213 – Users tab with Import button indicated*

- **Role**: The user's permissions. Options include **Admin**, **Limited**, **Full**, or **None**. See **Add user**.
- **Prox ID**: The proximity card ID (for systems with a proximity card reader only).
- **Email**:* The user's email.
- **Phone**: The user's phone number.

*__Note__: You can view the CSV format and access a template by selecting __Sample CSV__. In the __Sample CSV__ window (shown in Fig. 214), select __Copy__ to copy the template. In KEYper GO Web, click __Download__ to download an Excel version. When finished, click __Close__.*

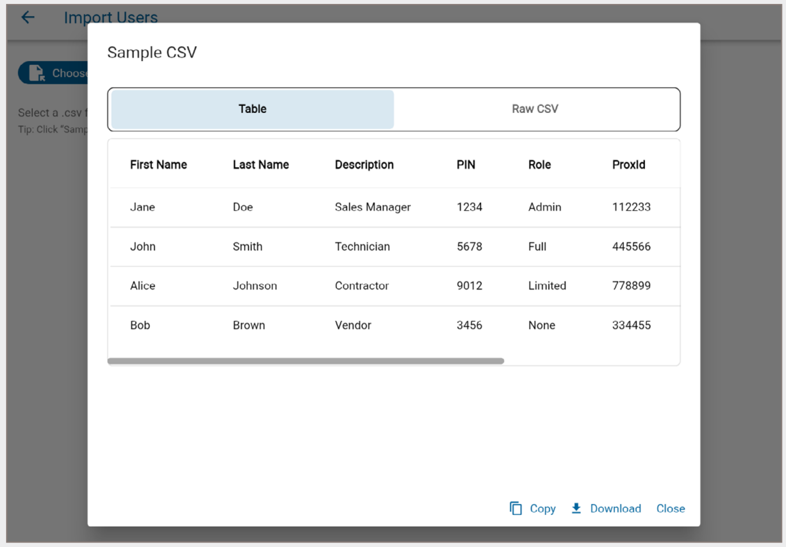


*Fig. 214 – Import Users screen with Upload CSV button indicated*

5. When you have finished creating the CSV file, select **Choose CSV** on the **Import Users** screen and select your CSV file.
6. Select the CSV delimiter from the dropdown menu.
   - The delimiter separates values in the CSV file. The default is a comma, but you can choose **Semicolon**, **Tab**, **Pipe**, or select **Custom** and enter your own delimiter.
7. When you are ready to import the assets, select **Upload CSV**, shown in *__Fig. 215__*.
8. On the **Confirm Import** window, select **Continue**.

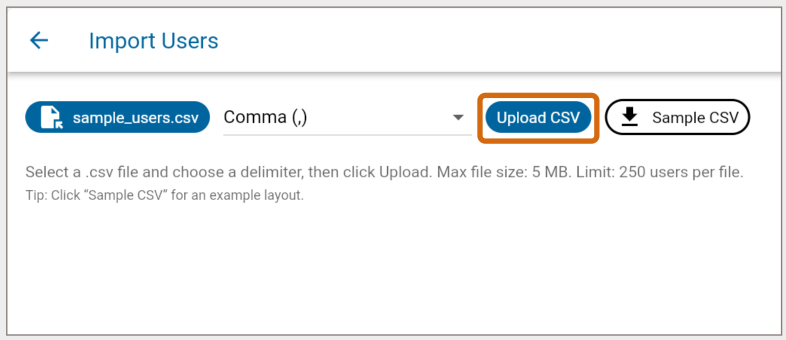


*Fig. 215 – Import Users screen with Upload CSV button indicated*

- When the import is finished, you will see the number of users that were successfully imported and if any users were skipped (as shown in *__Fig. 216__*). Additionally, you can review warnings about issues in the CSV file that may have prevented some users from being imported by expanding the **Warnings** list.
- Each successfully imported user will now have their own user record accessible from the **Users** tab on the **Admin** screen or by using the **search** feature.

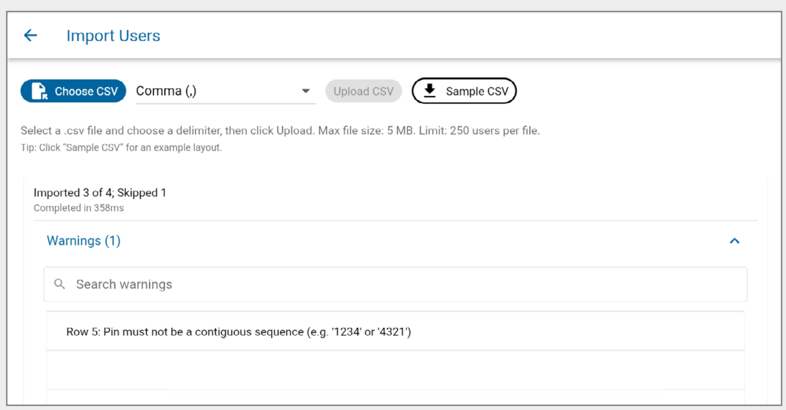


*Fig. 216 – Import results*

## 2. User details screen

When you select a user card, you are taken to the User details screen **Overview** tab, as shown in ***Fig. 217***. From here, you can view information about the user.

Admins may additionally edit the user’s details or permissions or delete the user entirely.

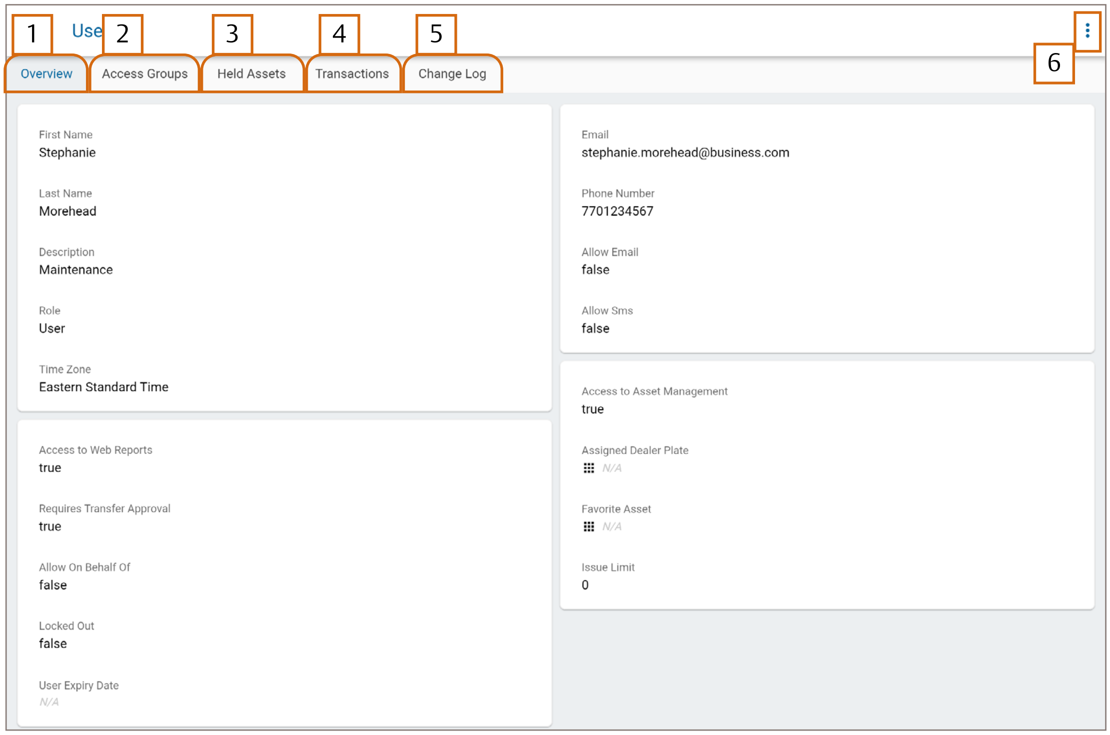


*Fig. 217 – The Overview tab of the User details screen*

The User details screen is organized as follows:

1. **Overview tab**
2. **Access Groups tab**
3. **Held Assets tab**
4. **Transactions tab**
5. **Change log tab**
6. **Quick action menu**

## 2.1 Overview tab

The **Overview** tab allows admins to view the user's details and permissions.

### 2.1.1 Demographics

The demographics area of the **Overview** tab, shown in ***Fig. 218***, includes the following information:

1. **First Name**: The user's first name is displayed.
2. **Last Name**: The user's last name is displayed.
3. **Description**: The optional user description is displayed.
4. **Role**: The user's role is displayed. It is either **User** or **Admin**.
5. **Time Zone**: The user's local time zone is displayed.

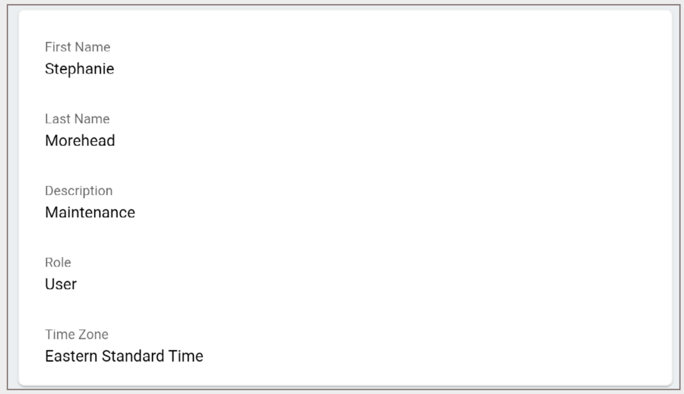


*Fig. 218 – User details screen – demographics*

### 2.1.2 User permissions

The user permissions area of the **Overview** tab, shown in ***Fig. 219***, includes the following information:

1. **Access to Web Reports**: This determines whether or not the user may access the reporting function of KEYper GO, KEYper GO Web, and the Web Admin. The available values are either **true** or **false**.
2. **Requires Transfer Approval**: This determines whether or not the user must have a transfer request approved before it is completed. The available values are either **True** or **False**.
3. **Allow On Behalf Of**: This determines whether the user may transfer assets on behalf of another user. The available values are either **true** or **false**.
4. **Locked Out**: This reveals whether or not a user is locked out of logging into the kiosk cabinet. The available values are either **true** or **false**.
5. **Time Zone**: The user's local time zone is displayed.
6. **User Expiry Date**: This is the date that the user's access is set to expire, if one was set during the user's registration. Typically, this value is ***N/A***.

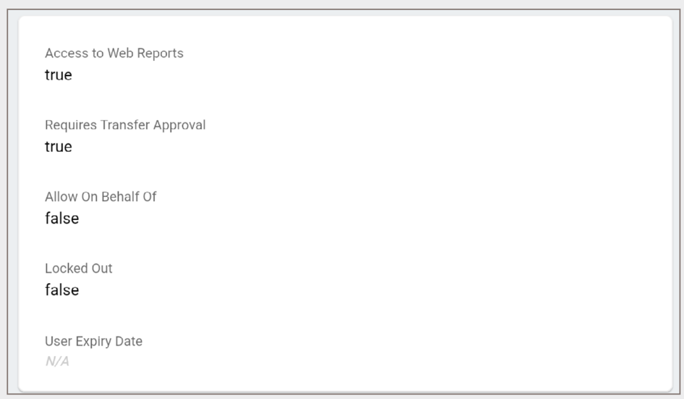


*Fig. 219 – User details screen – user permissions*

### *2.1.3 Contact information*

The contact information area of the **Overview** tab, shown in ***Fig. 220***, includes the following information:

***Note:*** *SMS notifications are only supported in the US (+1), Canada ( +1), and Mexico (+52).*

1. **Email**: The user's email address. This email address is used to log in to KEYper GO, KEYper GO Web, and the Web Admin. If allowed, this email address is also where the user may receive alerts.
2. **Phone Number**: The user's 10-digit phone number. If SMS alert messages are enabled, a phone number must be provided.
3. **Allow Email**: This determines whether the user receives email alerts. The available values are either **true** or **false**.
4. **Allow SMS**: This determines whether the user receives text message alerts. The available values are either **true** or **false**.


*Fig. 220 – User details screen – contact information*

### *2.1.4 Physical access*

The physical access area of the **Overview** tab, shown in ***Fig. 221***, includes the following information:

1. **Access to Asset Management**: This determines whether the user has permission to add, edit, and delete assets. The available values are either **true** or **false**.
2. **Assigned Dealer Plate**: If a user is a assigned a specific dealer plate, it is displayed. If a dealer plate is assigned, select it to open the Asset details screen. If no dealer plate is assigned, the value is ***N/A***.
3. **Favorite Asset**: Typically used for Fleet management, the **Favorite Asset** field is tied to the **Mileage Tracking** feature. If you have the system configured to restrict check-out to the vehicle with the least amount of miles on it, this field overrides that functionality and allows a user to check out the asset specified in this field. If no favorite asset is assigned, the value is ***N/A***.
4. **Issue Limit**: The number of keys this user may have checked out of the key system at any given time. Zero indicates no limit.


*Fig. 221 – User details screen – physical access*

## 2.2 Access Groups tab

The **Access Groups** tab displays the access groups to which the user belongs, as shown in *Fig. 222*. Admins may edit the user's access groups by checking or unchecking **Enabled** next to each access group. See **Add access group** for further information.

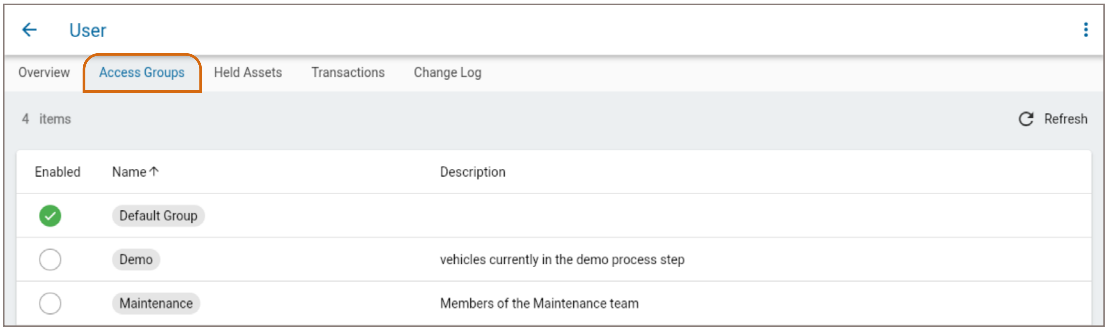


*Fig. 222 – The Access Groups tab of the User details screen*

## 2.3 Held Assets tab

The **Held Assets** tab displays all assets the user currently has checked out and in their possession, as shown in *Fig. 223*. You may **Transfer** the asset or open the **Asset details screen** from this tab.

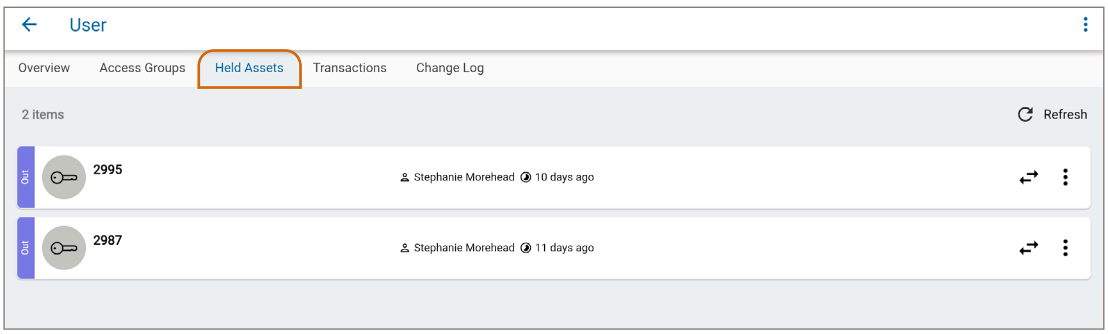


*Fig. 223 – The Held Assets tab of the User details screen*

## 2.4 Transactions tab

The **Transactions** tab displays the transactions at the cabinet involving the selected user, including logins, logouts, check-outs, and check-ins with time stamps, as shown in *Fig. 224*. The system the user logged into, logged out of, took the asset from, or returned the asset to is displayed in the **System** column. The type of transaction is displayed in the **Type** column. By default, transactions are sorted by date and time, with the most recent transactions first.

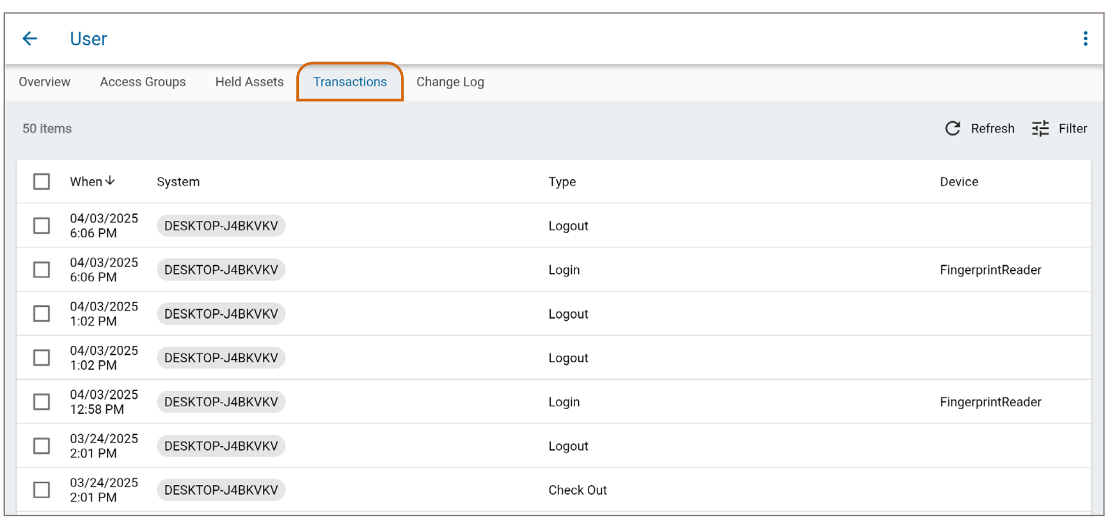


*Fig. 224 – The Transactions tab of the User details screen*

### 2.5 *Change log tab*

The **Change Log** tab displays a log of the changes made to the user record, as shown in ***Fig. 225***. Select **Filter** to filter the log by date, description, user, or any particular term that you type in, such as "transfer."

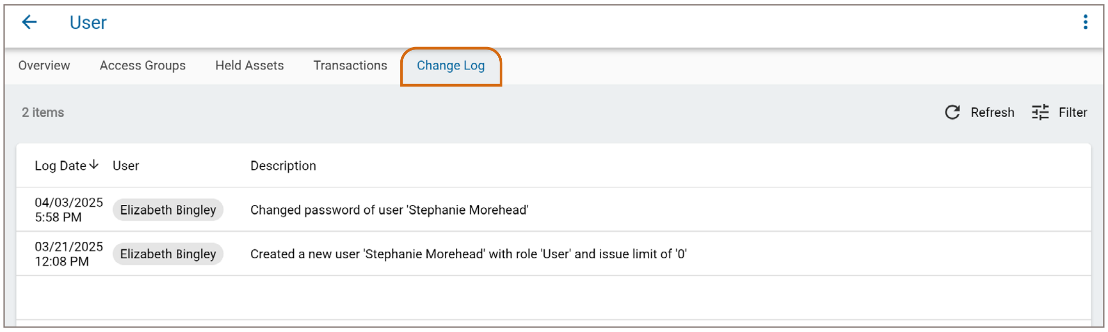


*Fig. 225 – The Change Log tab of the User details screen*

### 2.6 *Quick action menu*

Selecting **menu** from any of the tabs on the User details screen opens the **quick action menu**, as shown in ***Fig. 226***.

The quick actions you can take are as follows:

1. **Share**: Select to copy a link to the user record to your clipboard. This link may be shared with other users of KEYper GO Web.
2. **Edit**: Select to open the **Edit User** screen. See **Add user** for further information.
3. **Delete**: Select to delete the user.

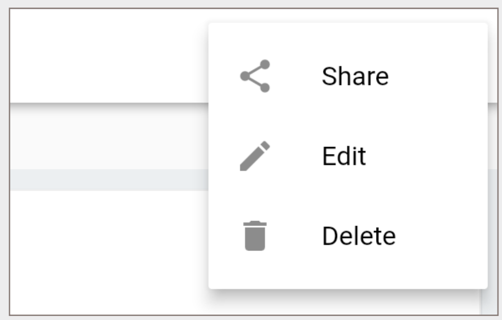


*Fig. 226 – User details screen – quick action menu*

## 3. Access Groups tab

The **Access Groups** tab provides an at-a-glance overview of the access groups in your database. From here, admins may edit and delete access groups. To add new access groups, see **Add access group**.

### *3.1 List view*

The default display is the list view, shown in ***Fig. 227***, which continually loads more cards as you scroll.

The information displayed in the list view of the **Access Groups** tab is as follows:

1. **Access group icon**: Click or tap one or more **icons** to select and delete the access group(s).
   - When selected, the icons change to a check.
   - Select **Delete** to delete the access group(s) or **Cancel** to clear the selection. These buttons appear in place of **Refresh** and **Filter** after selecting one or more boxes.

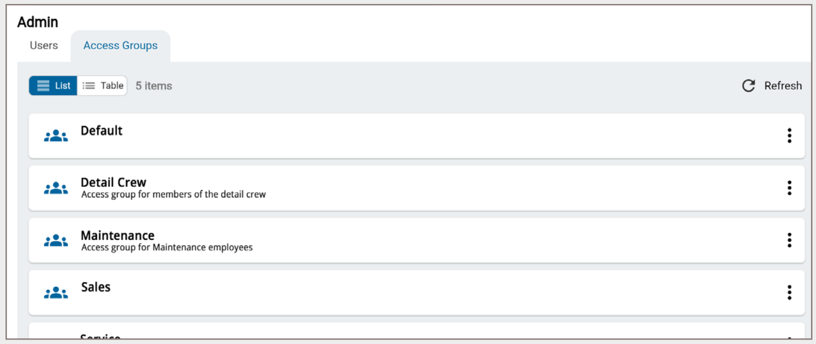


*Fig. 227 – Admin screen – Access Groups tab – list view*

2. **Access group name**: The name of the access group is displayed in bold type, sorted A-Z.
   - The optional group description appears below the name.
3. **Quick action menu**: Select **menu** to open the **quick action menu** shown in ***Fig. 228***.

### *3.2 Access groups quick action menu*

Selecting **menu** on the **Access Groups** tab of the **Admin** screen opens the **quick action menu**, as shown in ***Fig. 228***.

The quick actions you can take are as follows:

1. **View**: Select to open the **Access group details screen**.
2. **Edit**: Select to open the **Edit Access Group** screen. See **Access group details screen** for further information.
3. **Delete**: Select to delete the user. To delete multiple users at a time, see **Table view**.

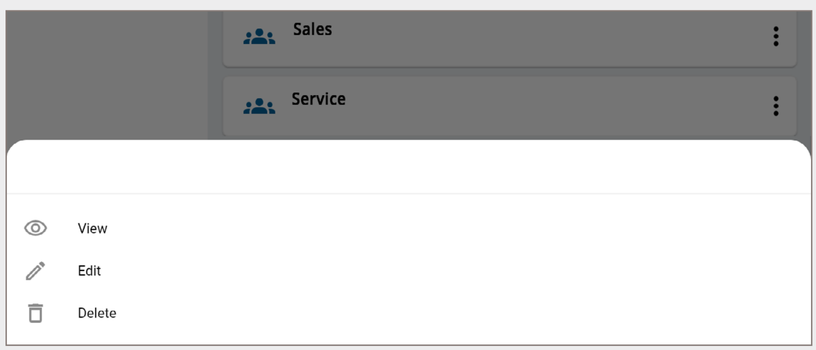


*Fig. 228 – Admins screen – Access Groups tab – quick action menu*

### 3.3 *Table view*

To organize your access groups into a table view, select the **Table** button at the top of the screen. Access groups are arranged into pages of 100 records each, shown in ***Fig. 229***. Navigate the pages by using the arrows at the bottom of the screen. Each column can be sorted into ascending or descending order.

The information displayed in the table view of the **Access Groups** tab includes the following:

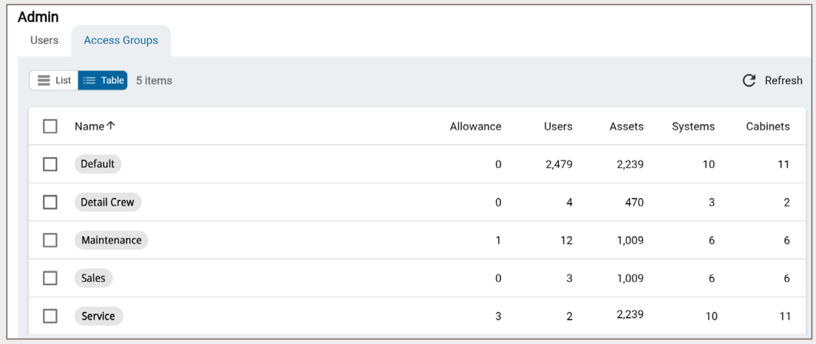


*Fig. 229 – Admin screen – Access Groups tab – table view*

1. **Name**: The name of the access group is displayed within a gray bubble. Access groups are sorted by default, ascending A-Z.
   - Select to open the **Access group details screen**.
2. **Allowance**: The maximum number of assets the members of the access group may have checked out at any one time is displayed. Zero indicates no limit.
3. **Users**: The number of users that are members of this access group.
4. **Assets**: The number of assets that are enrolled in this access group.
5. **Systems**: The number of systems that are enrolled in this access group.
6. **Cabinets**: The number of cabinets that are enrolled in this access group.
7. To delete one or more access groups, check the box(es) next to the access group name(s).
   - Select **Delete** to delete the access group(s) or **Cancel** to clear the selection. These buttons appear in place of **Refresh** and **Filter** after selecting one or more boxes.

## 4. Access group details screen

When you select an access group card, you are taken to the Access Group details screen **Overview** tab, as shown in ***Fig. 230***. From here, you can view information about the access group. Admins may additionally edit the access group's details or permissions or delete the access group entirely.

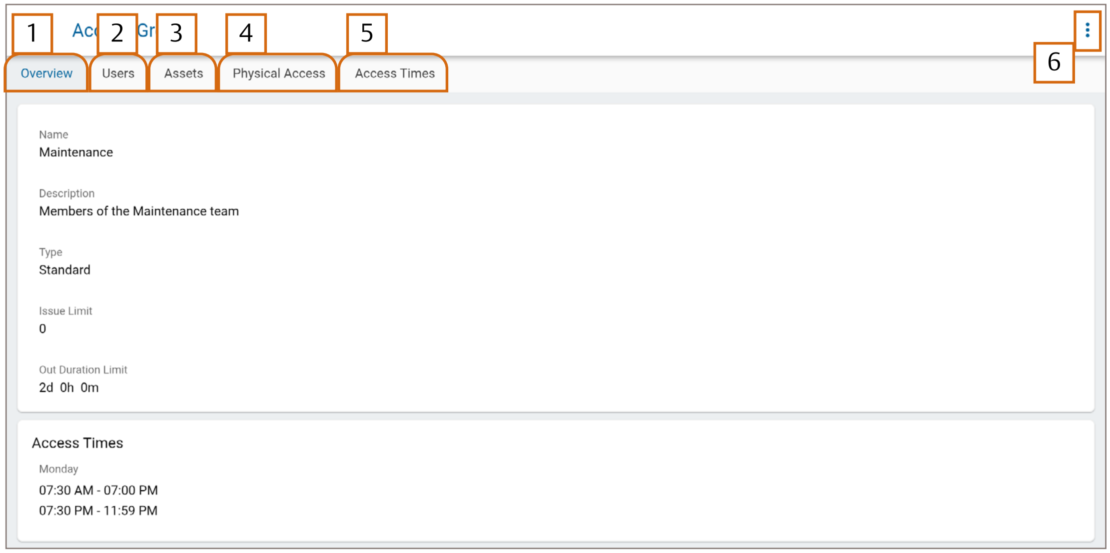


*Fig. 230 – The Overview tab of the Access Group details screen*

The Access Group details screen is organized as follows:

1. **Overview tab**
2. **Users tab**
3. **Assets tab**
4. **Physical Access tab**
5. **Access Times tab**
6. **Quick action menu**

### 4.1 Overview tab

The **Overview** tab allows admins to view the access group's details and settings.

#### 4.1.1 Settings

The settings area of the **Overview** tab, shown in ***Fig. 231***, includes the following information:

1. **Name**: The name of the access group.
2. **Description**: The optional description of the access group.
3. **Type**: The type of access group. The available values are either **Standard** or **Process Step**.
   See **Add access group** for further information.
4. **Issue Limit**: The number of keys users in this access group may have checked out of the key system at any given time. Zero indicates no limit.
5. **Out Duration Limit**: The length of time users in this access group may have assets checked out of the key system before they become overdue.

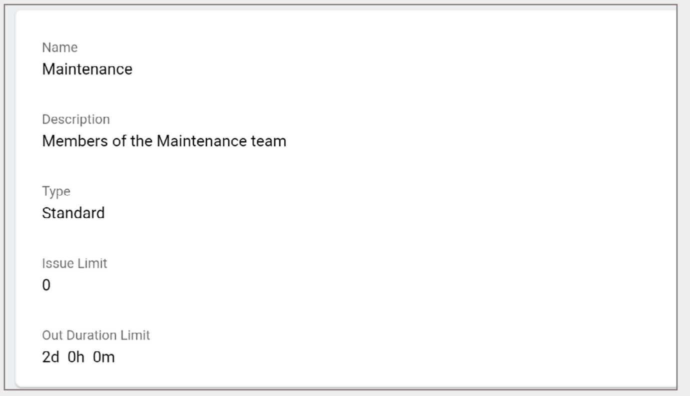


*Fig. 231 – Access group details screen – settings*

#### 4.1.1 Access Times

The access times area of the **Overview** tab, shown in ***Fig. 232***, includes the following information:

1. The times that members of the access group may check assets in and out of the cabinet are listed by day and block of time. See **Add access group** for further information.


*Fig. 232 – Access group details screen – Access Times*

## 4.2 Users tab

The **Users** tab displays the users that are members of this access group, as shown in ***Fig. 233***. Admins may edit the access group's members by checking or unchecking **Enabled** next to each user.

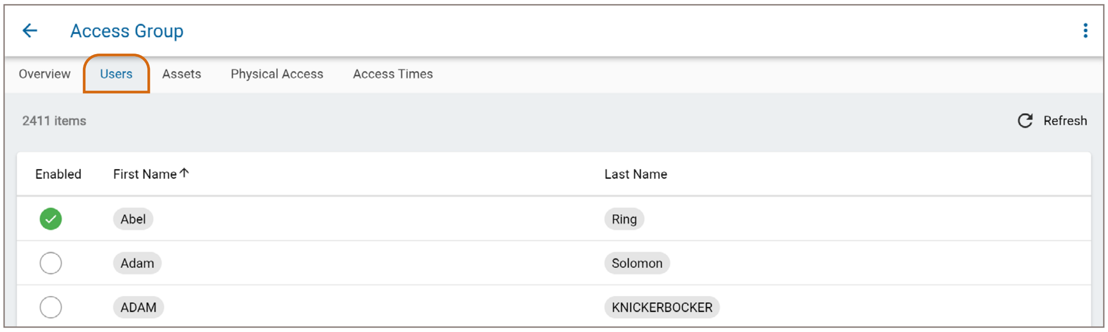


*Fig. 233 – The Users tab of the Access Group details screen*

## 4.3 Assets tab

The **Assets** tab displays all assets this access group's permissions apply to, as shown in ***Fig. 234***. Select the bubble in the **Enabled** column for the asset you wish to add to the access group. The bubble turns green and displays a check mark when the asset has been added. If you wish to unassign a single asset from an access group, select the check mark in the **Enabled** column for that asset. The bubble becomes blank and the asset is removed from the access group. To add or remove multiple assets to the access group at once, use the check boxes beside the assets and select **Add** or **Remove** . Select **Cancel** to clear the selection.

***Note:*** *Assets for process step access groups may not be modified within this screen. See the* ***Electronic System Manual*** *for further information.*

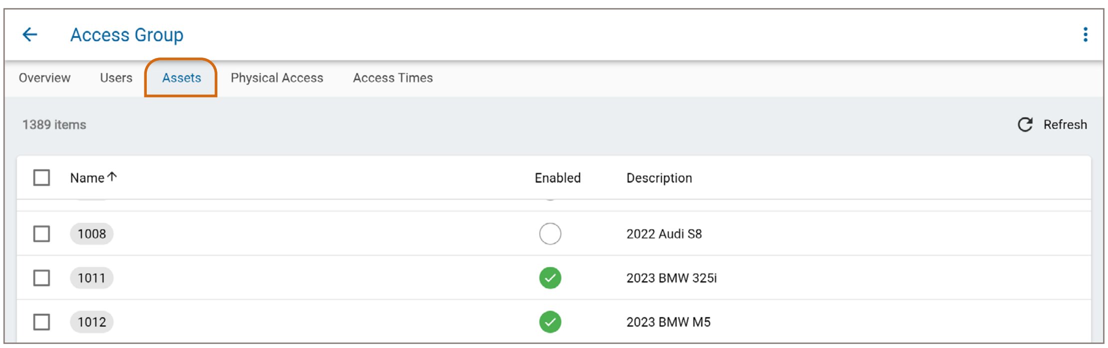


*Fig. 234 – The Assets tab of the Access Group details screen*

## 4.4 Physical Access tab

The **Physical Access** tab displays the system(s) and cabinet(s) the access group's permissions apply to, as shown in ***Fig. 235***. Check or uncheck the box next to a system or cabinet to allow or disallow access to members of this access group.

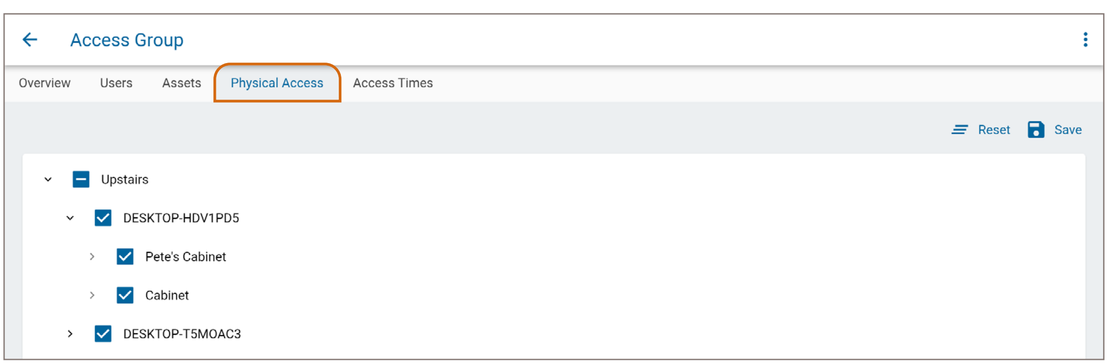


*Fig. 235 – The Physical Access tab of the Access Group details screen*

### 4.5 *Access Times tab*

The **Access Times** tab displays the times that members of the access group can log in to the kiosk cabinet and check keys in and out, as shown in ***Fig. 236***. Select **Add** to add a new access time. Select the **box** next to an access time to reveal the delete button. Select **Delete** to remove the selected access time(s). Select **Edit** to change an existing access time. See **Add access group** for further information.

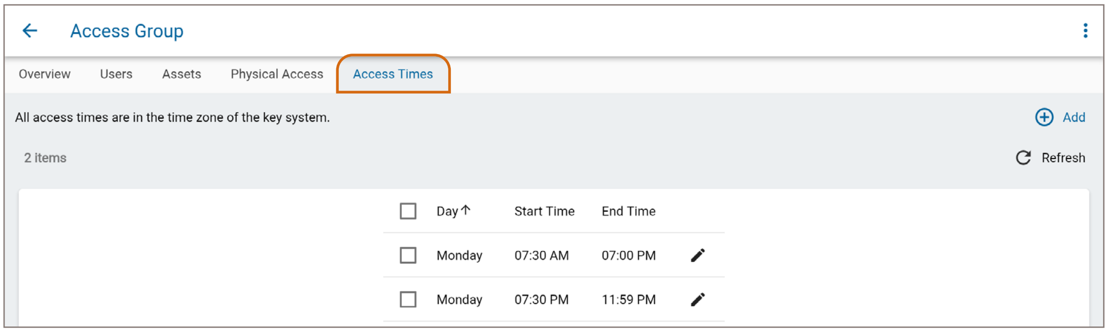


*Fig. 236 – The Access Times tab of the Access Group details screen*

### 4.6 *Quick action menu*

Selecting **menu** from any of the tabs on the Access Group details screen opens the **quick action menu**, as shown in ***Fig. 237***. The quick actions you can take are as follows:

1. **Edit**: Select **Edit** to open the **Edit Access Group** screen. See **Add access group** for further information.
2. **Delete**: Select **Delete** to delete the access group.

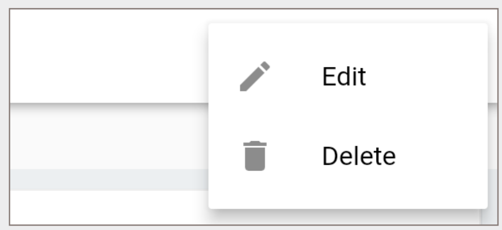


*Fig. 237 – Access Group quick action menu*

## Reports

There are a number of reports about your key management system available to you right out of the box. KEYper's software allows you to track a variety of metrics regarding the use of your system, as well as the ability to create custom reports tailored to your business.

Currently, reports are only available on the classic Web Admin, as shown in ***Fig. 238***. Select **OPEN CLASSIC REPORTING** to launch the Web Admin in a new tab.

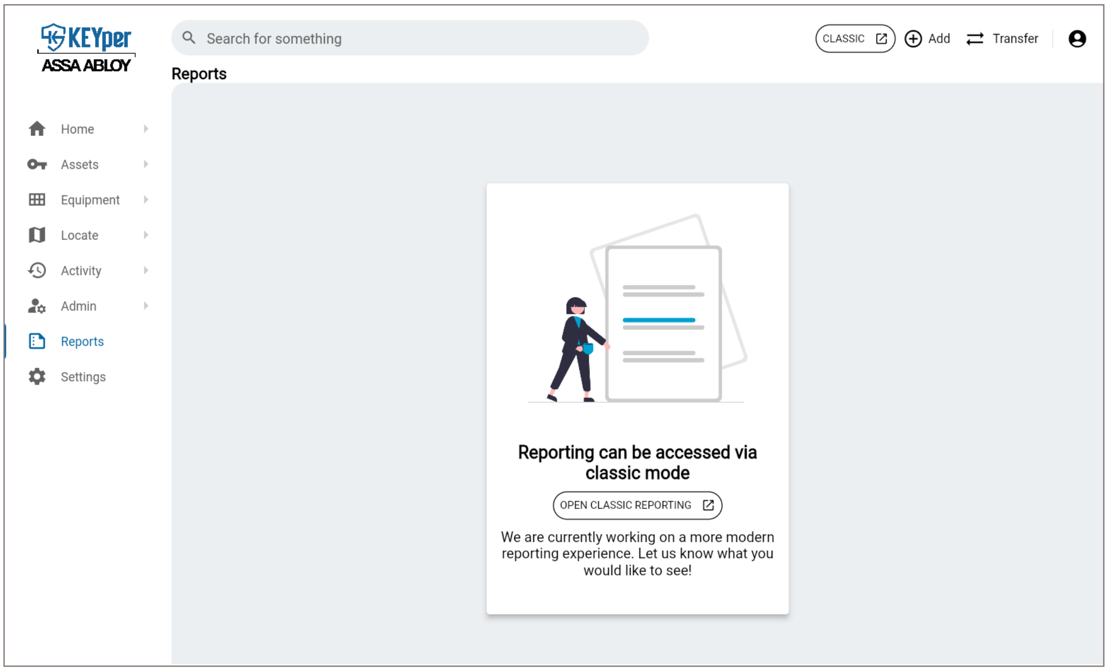


*Fig. 238 – The Reports screen*

## Settings

The **Settings** screen is shown in ***Fig. 239*** and ***Fig. 240***.

In KEYper GO, the **Settings** screen is accessible from the **Settings** option in the **More** menu. In KEYper GO Web, the **Settings** screen is accessible from the **Settings** option in the navigation menu.

On the **Settings** screen, there is the **General** tab.


*Fig. 239 – The default view of the Settings screen (KEYper GO)*


*Fig. 240 – The default view of the Settings screen (KEYper GO Web)*

# 1. General tab

## 1.1 Lot Location

The **Lot Location** feature allows you to set the current location of your vehicle. Lot locations must be assigned to lot location groups. The default lot location group comes already configured and lot locations in this group can be used by all systems. However, it is possible to add lot location groups to limit the access to certain lot locations to specific systems. From **Settings**, you can add, edit, and delete lot locations and lot location groups.

***Note: Lot Location** is an add-on feature available at an extra cost. For more information, contact Sales.*

### *1.1.1 Create a lot location group*

To create a lot location group, do the following:

1. Go to **Settings**.
   - In KEYper GO, the **Settings** option is available from the **More** menu. See ***Fig. 239***.
   - In KEYper GO Web, the **Settings** option is available from the main navigation menu at the bottom of the screen. See ***Fig. 240***.
2. Select **Edit Lot Locations**.
3. On the **Edit Lot Location Groups** screen, select **Add** .

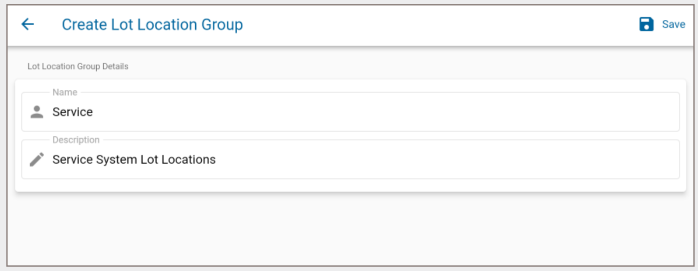


*Fig. 241 – Create Lot Location Group screen*

4. On the **Create Lot Location Group** screen, complete the following fields, shown in ***Fig. 241***, for the new lot location group:
   - **Name:** Enter a name for the lot location group (e.g., Service).
   - **Description:** Enter a short description for the lot location group (e.g., Service System Lot Locations).
5. Select **Save**.
   - Your lot location group has been created successfully.

### *1.1.2 Add a lot location to a lot location group*

To add a lot location to a lot location group, do the following:

1. Go to **Settings**.
   - In KEYper GO, the **Settings** option is available from the **More** menu. See ***Fig. 239***.
   - In KEYper GO Web, the **Settings** option is available from the main navigation menu at the bottom of the screen. See ***Fig. 240***.
2. Select **Edit Lot Locations**.
3. Select the lot location group you wish to add a lot location to.
4. On the **Lot Location Group Details** screen, select **Add Lot Location**, as shown in ***Fig. 242*** and ***Fig. 243***.
5. On the **Create Lot Location** screen, complete the following fields for the new lot location:
   - **Name:** Enter a name for the lot location (e.g., Side Lot).
   - **Description:** Enter a short description for the lot location.
6. Select **Save**.
   - The new lot location is added to the items list on the **Lot Location Group Details** screen.
   - If you need to edit a lot location's name and/or description, select the **quick action menu** next to the lot location's name and select **Edit**. When you are finished, select **Save**.
   - If you need to delete a lot location, select the **quick action menu** next to the lot location's name and select **Delete**. Then confirm that you wish to delete the lot location from the pop-up that appears.

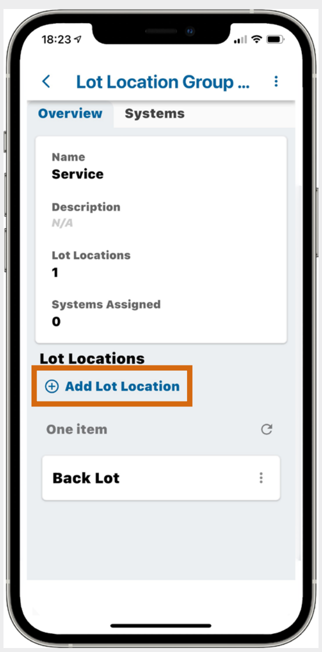


*Fig. 242 – Lot Location Details Group screen (KEYper GO)*

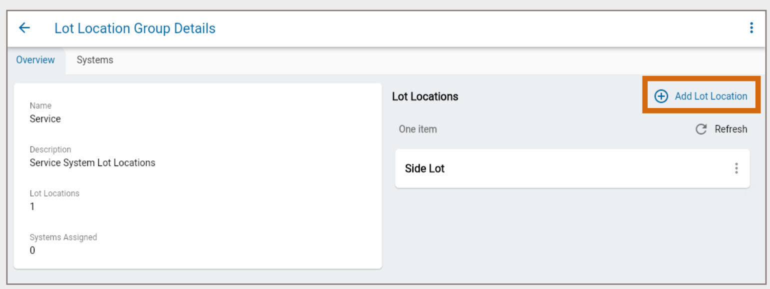


*Fig. 243 – Lot Location Details Group screen (KEYper GO Web)*

### 1.1.3 *Create a zone for a lot location*

You can define where a lot location is by creating boundaries known as a zone. Zones appear on the LIVE Map (see **LIVE Map tab**), as shown in ***Fig. 196***. To create a zone for the lot location, do the following:

1. Go to **Settings**.
   - In KEYper GO, the **Settings** option is available from the **More** menu. See ***Fig. 239***.
   - In KEYper GO Web, the **Settings** option is available from the main navigation menu at the bottom of the screen. See ***Fig. 240***.
2. Select **Edit Lot Locations**.
3. Select appropriate lot location group.
4. From the items list, select the lot location you wish to create a zone for, as shown in ***Fig. 244***.

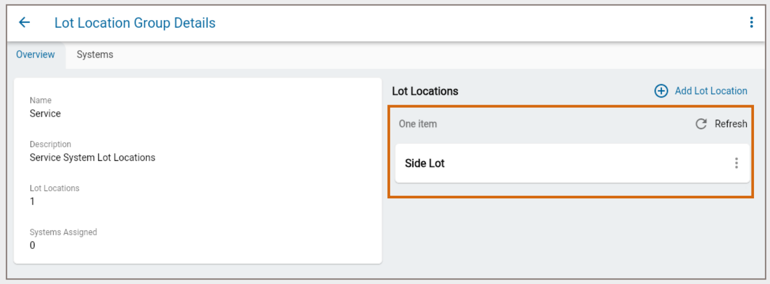


*Fig. 244 – Lot Location Details Group screen with items list indicated*

5. On the **Lot Locations Details** screen, select the **pencil** icon on the map to reveal the map editor, as shown in ***Fig. 245***.
6. Use ctrl + scroll or pinch zoom to find where you wish to place the zone on the map. To have the map snap to your current location, select the current location icon.
7. Click or tap on the map to create points that form the boundaries of the zone. You may drag the points to adjust them as necessary.
   - Additionally, you may select the **back arrow** icon to undo changes or the **trashcan** icon to delete the entire zone.
8. When you are satisfied with the zone you have created, select the **Save** icon.
   - The zone is added to the map view.
   - Alternately, if you wish to exit the map editor without saving the zone, select the **Exit** icon.


*Fig. 245 – Map view with editor open*

### *1.1.4 Assign a system to a lot location group*

Systems can only be assigned to one lot location group at a time. So, systems will need to be reassigned from their existing lot location group (i.e., the default group or a custom lot location group). To assign a system to a lot location group, do the following:

1. Check what lot location group the system is already assigned to (i.e., the default group or a custom lot location group).
   - To check what lot location group a system is assigned to, go to **Equipment,** then **Systems** (see **Equipment**) and select the desired system. The System details screen that appears will list the system's assigned lot location group, as shown in ***Fig. 191***.

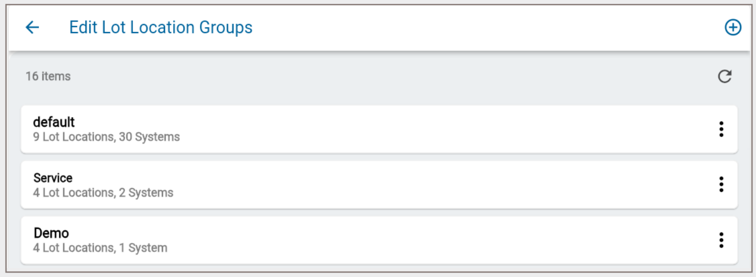


*Fig. 246 – List of lot location groups*

2. Once you know the system's assigned lot location group, navigate to that lot location group by going to **Settings**, then **Edit Lot Locations**.
   - In KEYper GO, the **Settings** option is available from the **More** menu. See ***Fig. 239***.
   - In KEYper GO Web, the **Settings** option is available from the main navigation menu at the bottom of the screen. See ***Fig. 240***.
3. Select the lot location group from the list of lot location groups that appears, as shown in ***Fig. 246***.

4. On the **Lot Location Group Details** screen, select the **Systems** tab.
5. Select the **checkbox(es)** for the system(s) you wish to reassign.
   - If you need to deselect a system, select the **checkbox** again.
   - If you need to select all systems, select the **checkbox** in the header row.
   - If you need to deselect all systems select **Cancel** ✕ .

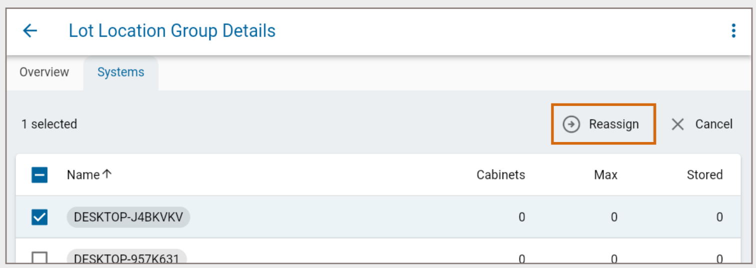


*Fig. 247 – Reassign system to a new lot location group*

6. Once you have the desired systems selected, select **Reassign** , as shown in ***Fig. 247***.
7. From the pop-up that appears, select the lot location group to assign the systems to.
   - The system is now reassigned to the new lot location group.

### 1.1.5 Edit a lot location group

To edit a lot location group, do the following:

1. Go to **Settings**.
   - In KEYper GO, the **Settings** option is available from the **More** menu. See ***Fig. 239***.
   - In KEYper GO Web, the **Settings** option is available from the main navigation menu at the bottom of the screen. See ***Fig. 240***.
2. On the **General** tab, select **Edit Lot Locations**.
   - The **Edit Lot Location Groups screen** appears with a list of the existing lot location groups.

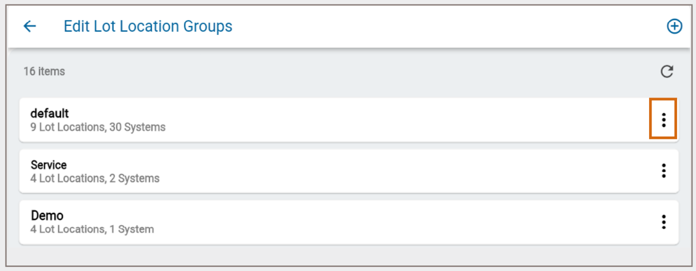


*Fig. 248 – The quick action menu*

3. Select the **menu** ⋮ for the lot location group you wish to edit, as shown in ***Fig. 248***.
4. From the pop-up that appears, select **Edit**.
5. Make any desired changes to the lot location group's name or description.
6. Select **Save** .
   - The lot location group is updated with your changes.

### 1.1.6 Delete a lot location group

To delete a lot location group, do the following:

***Note:*** *You may not delete a lot location group if it has systems assigned to it. Be sure to reassign the system(s) before attempting to delete the lot location group. For more information, see* ***Assign a system to a lot location group****.*

1. On the **General** tab of the **Settings** screen, select **Edit Lot Locations**.
   - The **Edit Lot Location Groups** screen appears with a list of the existing lot location groups.
2. Select the **menu** ⋮ for the lot location group you wish to delete, as shown in ***Fig. 248***.
3. From the pop-up that appears, select **Delete**.
4. From the pop-up that appears that asks you to confirm you wish to delete the lot location group, select **Delete**, as shown in ***Fig. 249***.
   - The lot location group is deleted.

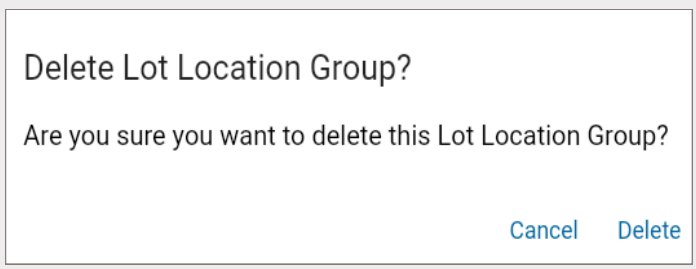


*Fig. 249 – Delete lot location group pop-up*

### 1.1.7 Update the vehicle’s lot location

You can update the vehicle’s lot location from the Asset details screen. For more information, see **Lot Location**.