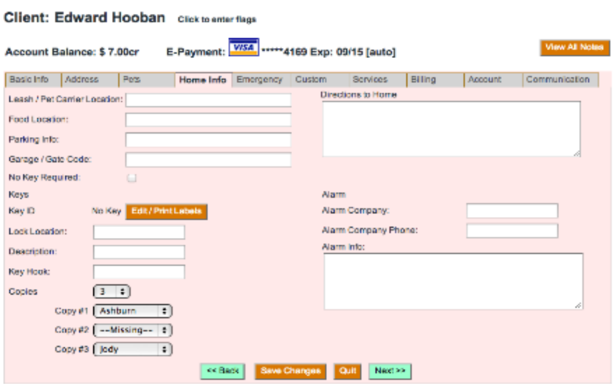
Tutorial: Key Management

Key Management is woven seamlessly into LeashTime. As your business grows larger, the need for a fully-integrated key management system becomes essential to smooth operations. With LeashTime key management you can track where all your keys are at any given time, how many keys you have for each client, who needs keys for upcoming visits, and when you need those keys.

In order to get started with key management, you first need to tell the system how many keys you have and where they are. To do this, you would do the following:

(1) Go to the client's profile, then to the **Home Info** tab



(2) In the **Copies** dropdown, tell LeashTime how many copies of a key your business has (includes copies in the office and with sitters).

(3) After you tell LeashTime how many copies of a key you have, the appropriate number of **Copy #** dropdowns will appear below.

(4) For each key copy, you will tell LeashTime the location

(5) If you know you have a copy of a key but do not know where it is, choose the --**Missing**-- option

(6) If the client does not require a key for entry (e.g. garage code or doorman), check the **No Key Required** box in the **Home Info** tab.

(7) Click the **Save Changes** button.

In the **Copy #** dropdown lists there may be an option that says **Key Safe #1**. If this is the case, you will want to go to **KEYS** > **Key Safe Manager** and give one or more safe locations a label. The key safe represents a physical location (such as an office) where you store keys that are not distributed to an individual sitter.

There are additional fields to describe more attributes of the client's keys, but *they are not required*. The purpose of the fields is as follows:

- **Lock Location**: text description of any specific issues with using the key with a lock

- **Description**: IF YOU ARE SWITCHING FROM ANOTHER SYSTEM AND HAVE KEY IDS PUT THAT INFORMATION HERE. Otherwise, this is free text field for anything else about the key.

- **Key Hook**: This field is designed to be used to track where you store you keys in the office. Many times people use labeled key hooks in a secure closet to organize keys. This does not have to be an actual key hook but some other compartment, folder, or labeled place in an organized system for storing keys.

If you are getting started with key management, you can and should take incremental steps. In LeashTime, it is not essential that you organize all your keys over a short period of time. Obviously, the more complete and accurate your key location data is, the more utility you will derive from the key management system.

Once you have logged information about the number and location of your keys, you will start to see the real benefits of the key management system and the reporting that LeashTime provides to help you manage your keys.

In the next couple of months, we will be addressing additional key management issues and best practices. This will include:

- Creating labels for your keys
- Using a bar code scanner with LeashTime key labels
- Reports and secure display options

Go ahead and get started tracking your keys!

Table 1 - Key Management

Type of Key Report	Location in System
Notification of Keys Needed	Home Page Keys Needed Report Key icon will appear next to visits Week-at-a-Glance Calender View Sitter Visit List Client Services tab visit list Sitter login on Web Notification of keys needed in future No Key for specific visits Sitter login on Mobile Email notification of visits
Key Reports	Sitter Keys - show all keys held by sitter and keys needed Key Location Report - show all keys by client