Access

Planon Software Suite

Version: L105

Planon

Building Connections

About this Document

Intended Audience

This document is intended for *Planon Software Suite* users.

Contacting us

If you have any comments or questions regarding this document, please send them to: support@planonsoftware.com.

Document Conventions

Bold
Names of menus, options, tabs, fields and buttons are displayed in bold type.

Italic text
Application names are displayed in italics.

CAPITALS
Names of keys are displayed in upper case.

Special symbols

	Text preceded by this symbol references additional information or a tip.
	Text preceded by this symbol is intended to alert users about consequences if they carry out a particular action in Planon.

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About Access

Access is a TSI in Planon ProCenter that enables an organization to manage which individuals have access to which of its properties, spaces and assets. The **Access** functionality includes two categories:

- Functionality to add an organization's keys and locks to the system
- Functionality to keep track of keys that are issued to or returned by personnel and visitors.

Access TSI allows security managers and similar staff in an organization to add key definitions, lock definitions, keys and locks. By linking keys to key definitions, locks to lock definitions and key definitions to lock definitions, they are able to create an access plan for properties, spaces and assets.

Additionally, **Access** includes functionality for HRM departments and reception desks, enabling them to keep track of keys that are issued to personnel or visitors and keys that have been returned.

Access - Concepts

This section describes the concepts available in the **Access** TSI and how they interact with each other.

Autocoding

A setting you can make in **Field definer** to enable the automatic generation of codes for lock and key definitions. This setting is activated by default.

Assets

Items of value owned by an organization such as furniture, computer hardware etc. to which access can be granted or denied by locks and keys.

In **Access** assets can be selected and viewed at the Components > Assets selection step.

Issued keys and key sets

Keys and key sets that are not in their storage location, but are instead in the possession of individuals. Key sets can be issued to both personnel and visitors. Single keys can be issued to personnel only.

The issuing of key sets or keys can be done either from **Personnel** or **Access** .

Key

A device used to open a lock, thereby granting access to a property, space or asset. In *Planon ProCenter*, the data associated with a physical key is added to an element that represents that key.

Key definition

The general attributes of a key, which are also inherited by all copies of that key. Each key added to Planon ProCenter must be linked to a key definition. Key definitions can be linked to lock definitions, which implies that all keys belonging to the key definition are compatible with all locks linked to the lock definition.

Key set

A group of keys that can be issued to a person or a visitor in Planon ProCenter. Once a key is part of a key set, its storage location must always be that of the key set and it can no longer be issued separately. To issue a single key to a visitor, a key set must be created containing just that key.

Lock definition

The general attributes of a lock, which are also inherited by all copies of the lock. Each lock added to Planon ProCenter must be linked to a lock definition. Lock definitions can be linked to key a definition, which implies that all locks belonging to the lock definition are compatible with all keys linked to the key definition.

Lock

A device, which when opened by a key permits access to a property, space or asset. In Planon ProCenter, the data associated with a physical lock is added to an element that represents that lock.

Personnel

The internal staff belonging to an organization.

Individuals that are part of an organization's internal staff are added in **Personnel** .

Property

A physical building to which access can be granted or denied by locks and keys.

Returned keys and key sets

Keys and key sets that were previously issued to individuals that are now returned to their storage location.

Space

A room in a physical building to which access can be granted or denied by locks and keys.

Key storage

The location where keys and locks are stored when they are not in use. You can specify a storage location for each lock and each key. However, once a key becomes part of a key set, its individual storage location is automatically that of the key set.

Visitor

An individual visiting an organization. Visitors are added in **Personnel** .

Working with Access

Access enables an organization to manage which individuals have access to which of its properties, spaces and assets. **Access** functionality includes two categories:

- Functionality to add an organization's keys and locks to the system
- Functionality to keep track of keys that are issued to or returned by personnel and visitors.

Access allows individuals belonging to an organization (such as security managers) to add key definitions, lock definitions, keys and locks. They can then link keys to key definitions, locks to lock definitions and key definitions to lock definitions to create an access plan for properties, spaces and assets. Additionally, **Access** includes functionality for HRM departments and reception desks that enables them to keep track of keys that are issued to personnel or visitors and keys that have been returned.

Adding key definitions

Procedure

1. Go to Components > Key definitions.
2. On the action panel, click Add.
3. In the data section, complete the relevant fields.
4. Click Save.

Adding keys

To add one or more keys to a key definition.

Procedure

1. Go to Components > Key definitions.
2. Select the key definition to which you want to add a key.
3. Go to Locks and keys > Keys selection step.
4. On the action panel, click Add.
5. In the data section, complete the relevant fields. For field descriptions, go to Keys - fields.
6. Click Save.

   A key is added to the key definition.

Activating / deactivating autocoding for key or lock definitions

You can activate or deactivate the automatic generation of a code for key or lock definitions. Autocoding is activated by default.

In Field Definer > Business objects, select either the **Key definitions** business object or the **Lock definitions** business object.

Procedure

1. On the action panel, set the status of Key definitions or the status of Lock definitions to Under construction.

2. On the action panel, click Business object settings.

   Depending on which business object was selected, either the **Key definition settings** or the **Lock definition settings** dialog box opens.

3. Click Yes to activate autocoding or click No to deactivate autocoding.

4. Click Save.

5. Click Exit.

6. On the Business objects selection level, select the Completed status on the action menu.

Depending on which business object was selected and which option was selected, autocoding is now activated/deactivated for either **Key definitions** or **Lock definitions**.

Issuing keys

You can register if keys have been issued to or returned by personnel.

> ⚠️ It is not possible to issue a single key to a visitor. If you want to issue a single key to a visitor, you have to create a key set with only one key.

Procedure

1. At Lock and keys > Keys, select a key.

2. At Matching locks/keys > Issued and returned keys, click Issue, on the action panel,

3. In the data section, complete the relevant fields.

   For a description of these fields, refer to Key issuing - fields.

4. Click Save.

You have now issued a key to the selected person.

Returning keys

Procedure

1. Go to Matching locks/keys > Issued and returned keys.
2. Select the issued key that is about to be returned.
3. On the action panel, click Return.
4. The Returned on field is populated with the current date-time.

You have now registered that the key has been returned.

⚠️ After a key has been returned, it may take up to a maximum of 60 seconds before this same key can be issued again.

Adding key sets

Procedure

1. On the Components > Key sets action panel, click Add.
2. In the data section, complete the relevant fields.

   For a description of these fields, refer to Key sets - fields.

3. Click Save.

You have added a key set.

Issuing and returning key sets

You can register key sets that have been issued to or returned by personnel or visitors.

Procedure

1. Go to Components > Key sets.
2. Select a key set.
3. Go to Locks and keys.
4. To issue a key set to a person or visitor, select the Issued and returned key sets selection step.
5. On the action panel, click Issue.
6. In the data section, complete the relevant fields.

   For a description of these fields, refer to Issuings of key sets - fields.

7. Click Save.

You have now issued a key set to the selected person or visitor.

To return key sets:

1. At the Locks and keys > Issued and returned key sets selection step, select the issued key set that is about to be returned.
2. On the action panel, click **Return**.
3. The **Returned on** field is populated with the current date-time.

   You have now registered that the key set has been returned.

> ⚠️ After a key set is returned, it may take up to a maximum of 60 seconds before this same key set can be issued again.

Adding lock definitions

To add a lock definition in **Access Management**.

Procedure

1. On the Lock definitions action menu, click Add.
2. In the data section, complete the relevant fields.

   For a description of these fields, refer to Lock definitions - fields.

3. Click Save.

Adding locks

You can add one or more locks to a lock definition.

Procedure

1. Go to Locks and keys > Locks.
2. Select the lock definition to which you want to add a lock.
3. Go to the Locations > Properties selection step and select the property to which you want to add the lock.
4. Select the Locks selection level.
5. On the Locks action panel, click Add.
6. In the data section, complete the relevant fields.

   For a description of these fields, refer to Locks - fields.

7. Click Save.

Adding key storage locations

You can add storage locations for locks and keys.

Procedure

1. Go to Locations > Key storage.
2. On the action panel, click Add.
3. In the data section, complete the relevant fields.

   For a description of these fields, refer to Key storage locations - fields.

4. Click Save.

If you go from the **Key storage** selection step to Locks and keys > Keys, all keys stored in that location are displayed (including those linked to a key set).

Linking key definitions to lock definitions

To link a key definition to a lock definition.

Procedure

1. Go to Components > Key definitions.
2. Select the key definition you want to link to a lock definition.
3. On the action panel, click the Lock definitions link.

   The **Lock definitions** dialog box appears.

4. In Available, select one or more relevant lock definitions.
5. Click the right arrow button.

   The selected lock definitions are now transferred to **In use**.

> ℹ️ To unlink lock definitions, select them in **In use** and click the left arrow button, thus transferring them back to **Available**.

6. Click OK.

The key definition is now linked to the selected lock definitions. Consequently, all keys belonging to this key definition are linked to the locks that belong to the selected lock definitions.

Linking lock definitions to key definitions

To link a lock definition to a key definition.

1. Go to Components **>** Lock definitions.
2. Select the lock definition you want to link to a key definition.
3. On the Links action panel, click Key definitions.

   The **Key definitions** dialog box appears.

4. In Available, select one or more relevant key definitions.
5. Click the right arrow button.

   The key definitions are now transferred to **In use**.

> ℹ To unlink the key definitions, select them in **In use** and click the left arrow button, thus transferring them back to **Available**.

6. Click OK.

The lock definition is now linked to the selected key definitions. Consequently, all locks belonging to this lock definition are linked to the keys that belong to the selected key definitions.

Linking keys to key sets

You can link a key to a key set.

Procedure

1. Go to Locks and keys **>** Keys.
2. Select the key you want to link to a key set.
3. In the Key set field, open the Key set dialog box.
4. Select a relevant key set.
5. Click OK.

The key is now linked to the selected key set.

Displaying all key definitions or lock definitions

You can display all key definitions or lock definitions on the **Components** selection level, regardless whether they are linked to a property. By default, at the **Key definitions** or **Lock definitions** selection steps, the only key definitions or lock definitions displayed in the elements list are those linked to properties selected at the Locations > Properties selection step.

The **Display unlinked key definitions** and the **Display unlinked lock definitions** buttons are available on the toolbar. When you click **Display unlinked key definitions** or **Display unlinked lock definitions**, all key/lock definitions are displayed.

Displaying the key sets of a selected property

You can display the key sets that belong to the selected property.

Procedure

1. On the Locations > Properties selection step, select a property.
2. On the Components > Key sets selection step, only those key sets are shown that contain at least one key whose key definition is related to a lock definition that has at least one lock in the selected property.
   If no property is selected at the Locations level, all key sets are shown.

Archiving locks and keys

Locks and keys that are no longer used can be transferred to the digital archive.

Procedure

1. Go to the Locks and keys selection level.
2. Select the lock or key that you want to archive.
3. On the action panel, click Transfer to archive.

To archive multiple selected locks and keys, use Action on selection.

4. Click Refresh list.

   The selected locks or keys are moved to the archive.

Archived locks and keys can be viewed in the elements list by clicking the **Show archived items** button. The data can only be viewed, not modified. If you want to use or modify archived locks and keys, you have to retrieve them from the archive.

> ℹ️ If a key is issued, it cannot be archived. Similarly, you cannot issue an archived key.

Access – Field Descriptions

Key definitions - fields

Field	Description
Code	Depending on your autocoding settings, a code must either be entered manually in this field, or the field is populated with an auto generated code consisting of code segments that are entered in the **Code 1 – 5** fields.
Display type	Open the dialog box via this field to select a display type for the key definition. The selected display type determines which data fields are displayed.
Description	Enter a description of the key definition.
Brand	Enter the brand of keys that belong to this key definition.
Code 1 to Code 5	If autocoding is activated in **Field Definer**, use these fields to enter up to five different code segments which together form the complete key definition code. This generated code is displayed in the **Code** field. The individual code segments are separated by a dot.
Supplier	Open the dialog box via this field to select the supplier of the keys belonging to this key definition.

Keys - fields

Field	Description
Code	Displays the automatically generated code of the key.
Description	Enter a description of the key.
Sequence number	A number automatically assigned to a key in order to differentiate between several keys belonging to the same key definition. The sequence number increments by one each time a new key is added to the same key definition. A sequence number can be manually overwritten.

Field	Description
Additional description	If required, enter an additional description of the key.
Issued	Displays whether the key has been issued or not.
Key definition	Displays the key definition to which the key belongs. You can select another key definition in the dialog box available via this field.
Key set	If relevant, select the key set to which the key belongs in the dialog box available via this field. Once a key set is selected in this field, no value can be entered in **Storage location**, since the storage location of a key belonging to a key set is that of the key set.
Key storage	Select a storage location for the selected key in the dialog box that is available in this field. Once a key or key set is issued, you can select the location to which the key or key set must be returned.
Issued on	This insert-only field displays the date-time on which the key was issued in the Personnel TSI.
Issued to (personnel)	This read-only field displays the name of the person from the **Personnel** selection level in the Personnel TSI to whom the key was issued.
Issued to (visitor)	This read-only field displays the name of the visitor from the **Visitors** selection level in the Personnel TSI to whom the key was issued.
Requested return date-time	This read-only field displays the date-time on which the key must be returned.

Key issuing - fields

Field	Description
Key	Select a key from the dialog box in this field.
Person	Select the person to whom the key is going to be issued.
Visitor	Displays the visitor to whom the key is issued.
Issued on	Displays the date on which the key is issued.
Requested return date	Enter the date on which the key should be returned.

Field	Description
Returned on	When the key is actually returned (by clicking the **Return** option on the action panel), this field is populated with the current date-time. The date-time can also be entered manually.
	Use the CTRL+D shortcut keys to quickly enter the current date-time.
Comment on issuing of key	Enter a comment on the issuing of the key as required.
Comment on return of key	Enter a comment on the returned key as required.
Property	Displays the property to which the key gives access.
Space	Displays the space to which the key gives access.
Asset	Displays the asset to which the key gives access.

Key sets - fields

Field	Description
Code	Enter a code for the key set.
Description	Enter a description of the key set.
Storage location	Select the storage location of the key set in the dialog box that is available via this field.
Issued	This field indicates whether or not the key set is issued.

Issuings of key sets - fields

Field	Description
Issued on	Displays the date on which the key set is issued.
Requested return date	Enter the date on which the key set should be returned.
Returned on	When the key set is actually returned (by clicking the **Return** option on the action panel), this field is

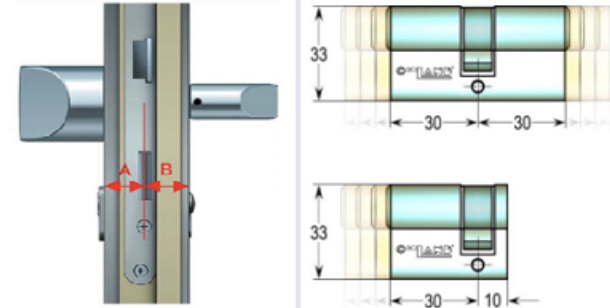| Field	Description
	populated with the current date-time. The date-time can also be entered manually.
	ℹ️ Use the CTRL+D shortcut keys to quickly enter the current date-time.
Note on issuing	If required, enter a comment on the issuing the key set.
Note on return	If required, enter a note on the returned key set.
Key set	This field displays the selected key set. If required, you can select another key set from the dialog box that is available in this field.
Person	Select the person to whom you want to issue the key set from the dialog box that is available in this field.
Visitor	Select the visitor to whom you want to issue the key set from the dialog box that is available in this field.
Property	Displays the property to which the key set gives access.
Space	Displays the space to which the key set gives access.
Asset	Displays the asset to which the key set gives access.

Lock definitions - fields

Field	Description
Code	Depending on your autocoding settings, a code must either be entered manually in this field, or it is populated with an autogenerated code consisting of the code segments entered in the **Code 1 – 5** fields.
Description	Enter a description for the lock definition.
Category	Enter the category to which the lock definition belongs.
Brand	Enter the brand of locks that belong to this lock definition.
Code 1 up to and including Code 5	If autocoding is activated in **Field Definer**, use these fields to enter up to five different code segments

Field	Description
	which together form the complete lock definition code. This generated code is displayed in the **Code** field. The individual code segments are separated by a dot.
Supplier	Select the supplier of the locks belonging to this lock definition.

Locks - fields

Field	Description
Code	Displays the auto-generated code of the lock.
Description	Enter a description for the lock.
Sequence number	A number automatically assigned to a lock in order to differentiate between several locks belonging to the same lock definition. The sequence number increments by one each time a new lock is added to the same lock definition. A sequence number can be manually overwritten.
Additional description	If required, enter an additional description of the lock.
Lock definition	Displays the lock definition to which the lock belongs. You can also select a different lock definition from the list.
Property	Select a relevant property from the list to link the lock to a property.
Space	Select a relevant space from the list to link the lock to a space.
Asset	Select a relevant asset from the list to link the lock to an asset.
Storage location	Select the storage location of the lock from the list.
Type	Enter the lock's type. For example, cylinder lock with rotary knob.
Coloring	Enter the lock's color.
Length A	Enter a numerical value (in mm) that specifies one of the dimensions of the locking cylinder.

Field	Description
Length B	Enter a numerical value (in mm) that specifies the other dimension of the locking cylinder. See the image below:

Field	Description
Locking mechanism	Select the type of locking mechanism used in this specific lock. For example, cylinder lock, padlock or electronic lock.
Additional installation location	Enter the lock's location. For example, a room can have multiple doors which can contain a lock (cylinder).

Key storage locations - fields

Field	Description
Code	Enter a code for the key storage.
Description	Enter a description of the key storage.
Property	Select a property to link the storage location to a property.

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