Kensington®

Register & Retrieve™

STEP-BY-STEP HOW TO GUIDE
for Kensington Register & Retrieve

www.kensington.com/registerandretrieve

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Contents

STEP BY STEP HOW TO GUIDE

Register & Retrieve allows you to manage your Locks and order replacement keys.

You start by creating a Group. Store A for example.

You can then add the Locks that are needed to protect **Store A** to the **Store A Group**. You can allocate Locks to locations or to individuals – we'll call them Key Holders. Example locations might be Customer Service Desk, Manager's Office or Checkout 6.

If you have spare Locks you can also store those within the **Store A Group** as unallocated Locks. When the time comes to allocate the Lock to a holder or a Key Holder you can do so.

Should you ever need to move a Lock to a different group, Store B for example, you can do that too. Administration can be shared amongst trusted users and you can even order replacement keys direct from the system. If you allocate a Lock to an individual (a Key Holder) you can send that person an email to let them know to register or double check their key code and update their details. You can even allow that Key Holder to order replacement keys directly or with your approval.

Our business is protecting yours.

A. Create an Administrator Account

Go to: www.kensington.com/registerandretrieve and click the Register & Retrieve tab

1. Click **Create New Account**
2. Enter the details requested.

Note: The email address you enter will be your login name. An email address can only be registered once.

3. A link to activate your account will be emailed to the registered email address.
4. Open your email and click the link.
5. Set your personal password.
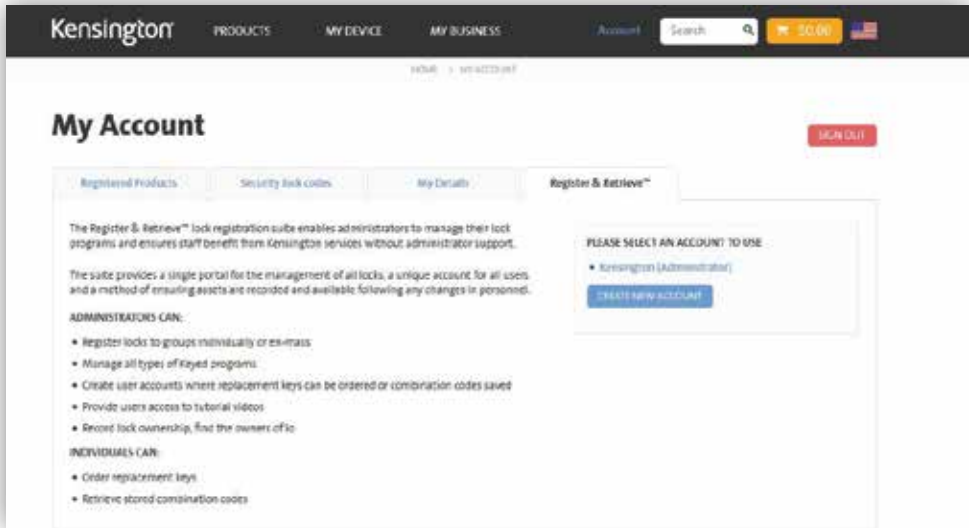
How do I change my password or name?

1. Login
▶ 2. Click **My Account > My Details**
3. Click **EDIT**
▶ 4. Make your changes and click **UPDATE**
5. Click **Log out**
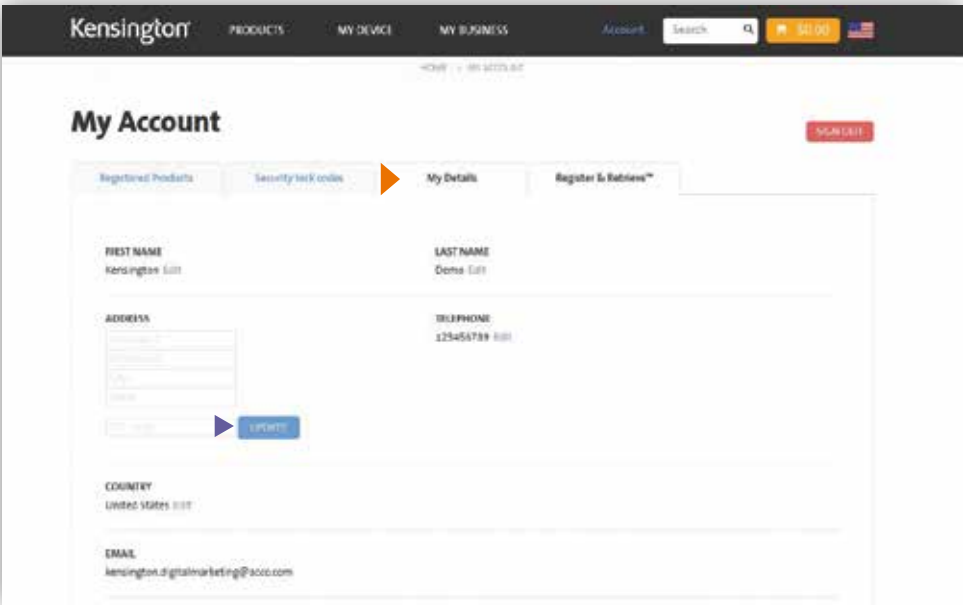
B. How do I share my Account?

You can share your account with other administrators. Other administrators will have full access to your account and the same permissions. Each account must always have at least one administrator.

1. Login
2. Click **Administrators**
▶ 3. Click **ADD ADMINISTRATOR**
4. Enter details
▶ 5. Click **ADD ADMINISTRATOR**
6. An email will be sent to the additional administrator with login instructions

Note: If a user already has an Account they will maintain their existing password and be prompted to select the Account they wish to administer/manage at login. Data is not merged or shared or consolidated across a user 's multiple accounts.
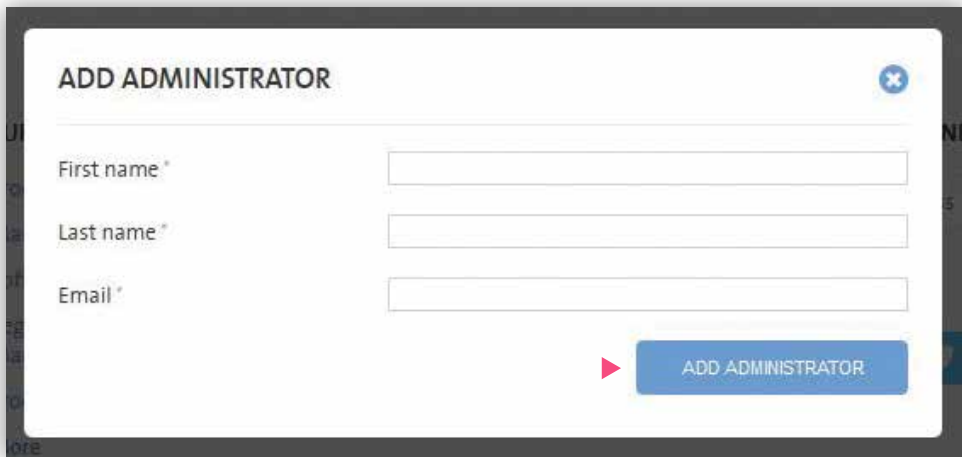
C. How do I delete an Administrator?

1. Login
2. Click **Administrators**
3. Click **Delete** next to the account you wish to delete from the account you have logged into.
4. Click **OK** to confirm

Note: The deleted account is NOT sent an email notification that their access to this account has been removed.

D. How do I register my Locks?

First you need to decide how you want to manage your Locks.

What is a Group?

Register & Retrieve allows you to manage your Locks in Groups. You can give each Group its own name. You can have as many different Groups as you need. A Group can be created before you have your Locks (excluding preset locks).

Once a Group is created you can add your Locks to that Group.

IMPORTANT: Locks can be added to a Group individually or en-mass using a bulk CSV upload tool. If you wish to use the CSV tool you must do this when the Group is first created. If you do not use the CSV upload functionality when the Group is created you may only add Locks to the Group individually at a later date. If you would like to use the CSV tool at a later date we recommend that you create a new group once you have prepared your CSV upload file.

Key Holders and Locations

Locks are registered to Key Holders (they must have an email address) and to Locations (these do not need to have an email address).
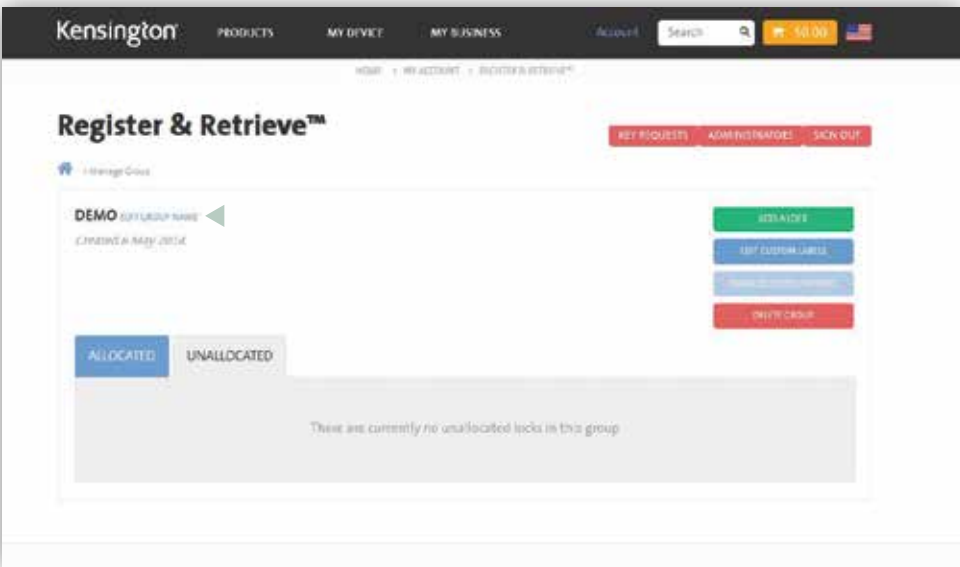
E. How do I create a Group?

1. Login
▶ 2. Click **CREATE GROUP**
3. Give your Group a name (you can edit this at a later date)
▶ 4. Click **CREATE GROUP**

Note: Your Group is now created. You can return to your administration home to create another Group by clicking the home icon or add Locks to your Group. If you want to log out click Log out.
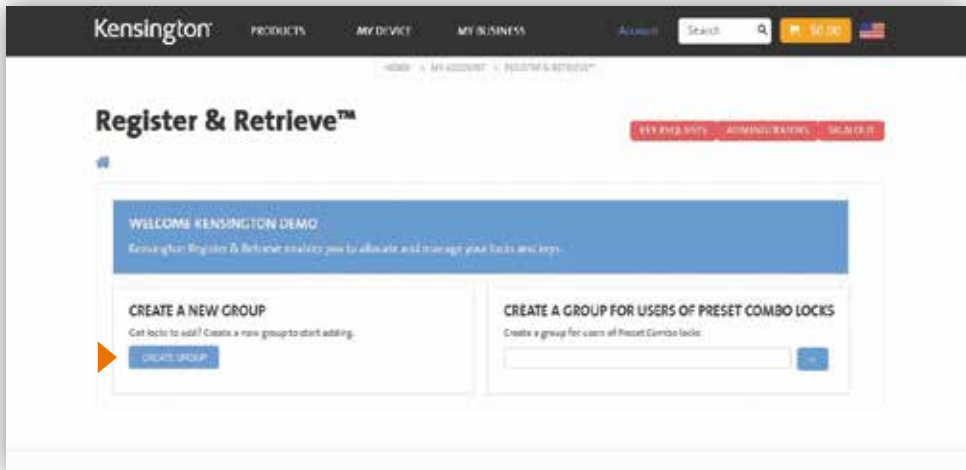
F. How do I change the name of my Group?

1. Log in
▶ 2. Select the Group you wish to edit in the **MANAGE LOCKS** drop down
▶ 3. Click the blue arrow button
▶ 4. Click **EDIT GROUP NAME**
5. Edit the name field
6. Click **UPDATE**
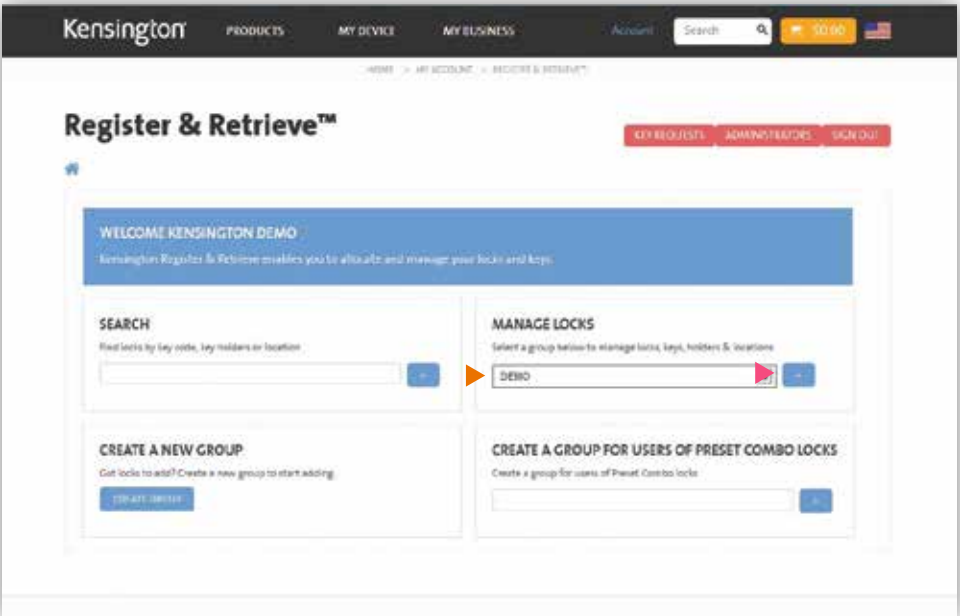
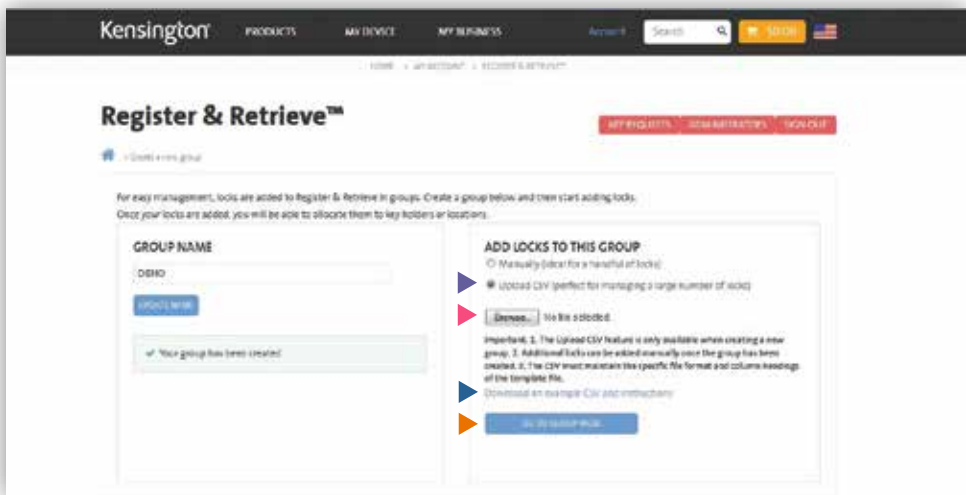## G. How do I add Locks to a Group using the CSV upload tool?

1. **See How do I create a Group?**
▶ 2. After creating your Group click the **Upload CSV button**
▶ 3. Click **Choose File**
4. Select your file
5. Click **Open**
▶ 6. Click **GO TO GROUP**

IMPORTANT: Your CSV file must be in a specific format. You can download an example template to populate by clicking ▶ Download an example CSV and instructions

H. How do I populate the CSV upload template?

IMPORTANT: Your CSV file must be in a specific format. You can download an example template to populate by clicking ▶ **Download an example CSV and instructions**

1. **See How do I create a Group?**
2. After creating your Group click **Download an example CSV and instructions**
3. Open the CSV template
4. Populate your data

You can store the following data against each Lock

Key Code — this is noted on the key and is needed to identify the right key for the right Lock. You can use this field to store Lock combination codes also.

Master Code — some Locks are part of a Master or Custom Program. You can use this field to store the Master Code that this individual Lock belongs to.

Sku — this is the manufacturers Lock part number. This field is mandatory. Check www.kensington.com for a full list of security lock skus.

First Name — this can be used to store the first name of the person the Lock is allocated to

Last Name — this can be used to store the last name of the person the Lock is allocated to

Email — this is the email address of the person the Lock is allocated to

IMPORTANT: Administrators can send email notification to users that a Lock has been allocated to them. Make sure that the email address is accurate. Key Holders will use this email address to log in to their Key Holder account. Key Holders with multiple Locks will be able to see them all — with the Group Names that the Locks belong to under the same account log in.

Telephone — can be used to store a telephone number

Mobile — can be used to store a mobile number

Employee Number — can be used to store an employee number

Location — is used to store the location name of the Lock

**Address 1, Address 2, Town/City, Region, Postcode** — are address fields that can be used

Cost Code — can be used to store an organizations' cost code unique to a particular Lock

Should you wish to add additional data to a Lock to help you manage and identify them you may use the custom1 and custom2 columns. You can change the name of these columns.

IMPORTANT: You can enrich the data you load at a later date but this must be populated individually per Lock.

How do I add Locks to a Group manually?

1. **See How do I create a Group?**
▶ 2. After creating your Group click the **Manually** button
▶ 3. Click **GO TO GROUP**
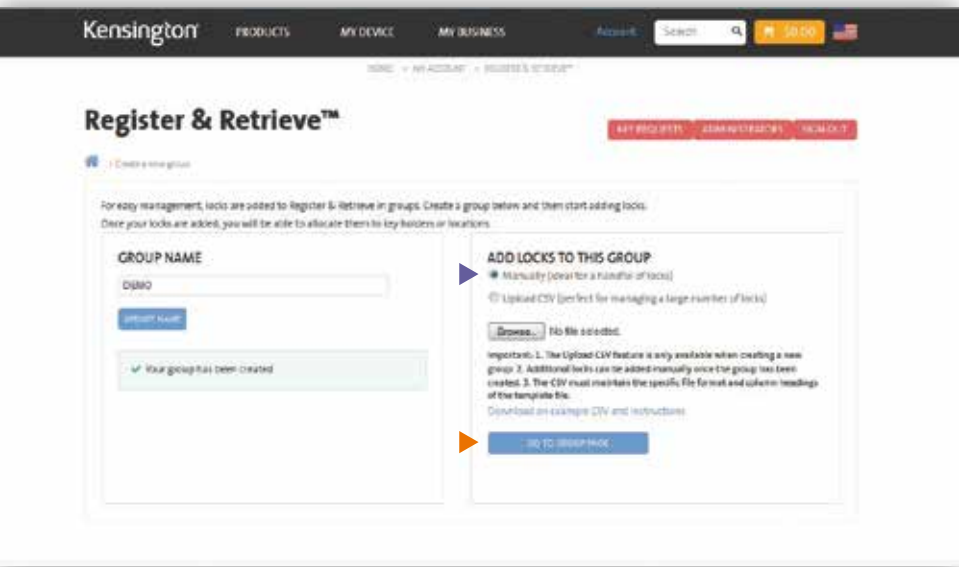
I.   How do I add a Lock to an existing Group?

1. Log in
2. Select the Group you wish to edit in the **MANAGE LOCKS** drop down
▸3. Click the **blue arrow** button
▸4. Click **ADD A LOCK**
5. Enter Lock details
6. You must now select to allocate the Lock to:
    HOLDER – an individual with an email address
   **LOCATION** – a physical location

You can change whether a Lock is allocated to a holder or a location at a later date. If you do not wish to allocate the Lock to a holder or a location you can add it to the Group as an **UNASSIGNED** Lock.

TIP: You can use the UNASSIGNED option for keeping track of spare Locks. Each Group can contain Locks allocated to Holders, Locations and unassigned Locks.
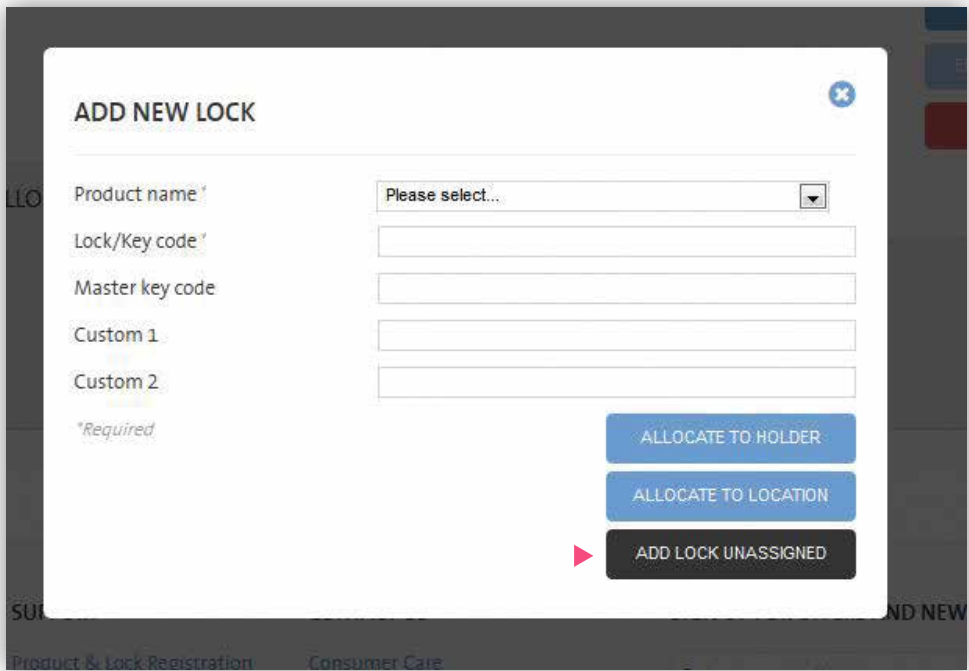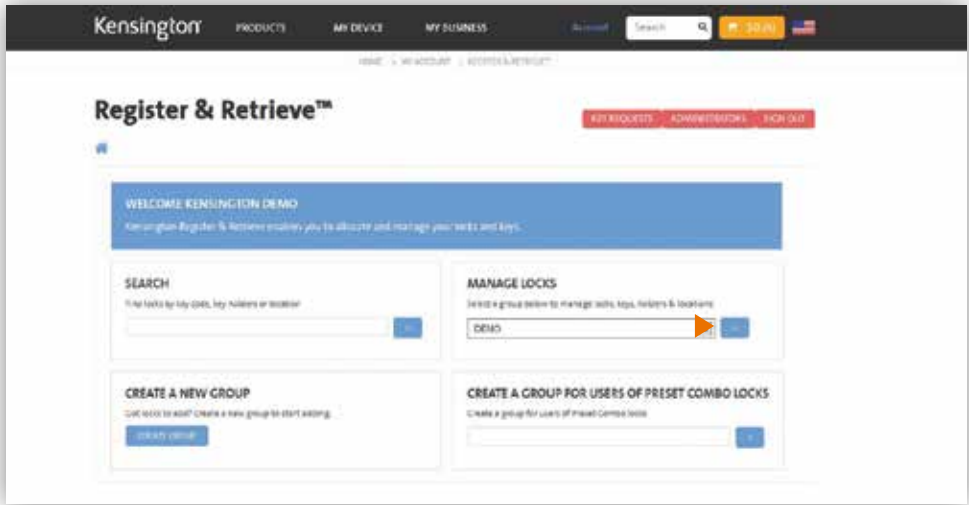
J.   How do I allocate a Lock to a Holder?

1. Log in
2. Select the Group you wish to edit in the **MANAGE LOCKS** drop down
3. Click the **blue arrow** button
4. Click **ADD A LOCK**
5. Enter Lock details
▸6. Click **ALLOCATE TO HOLDER**
7. Enter the Holders details
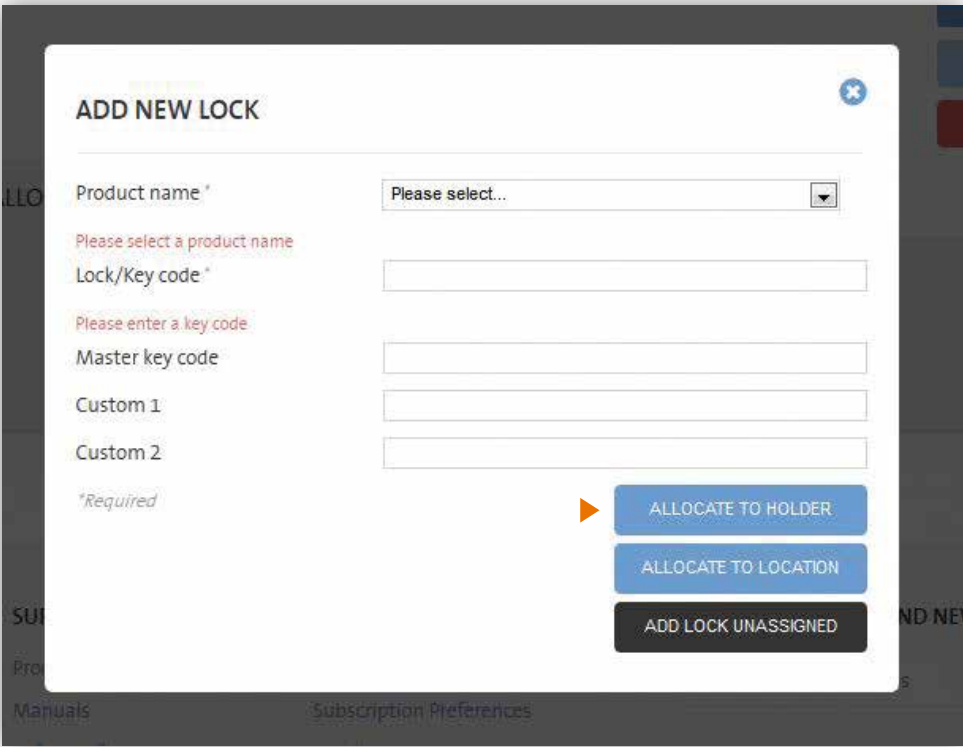
IMPORTANT: Lock Holders can request replacement keys. If you would like an Administrator to approve the request before it is sent to Kensington click the ▸**Require approval for replacement keys**

▸8. Click **NEXT**
9. You can now send an email to the Lock Holder. You can edit the email if you wish. The email will contain a link to Kensington Register & Retrieve and the user's account. If you would not like to send an email to the user at this time click ▸**Do not send holder email**. The email can be sent or resent at a later date. The email will be sent from do-not-reply@ kensingtonregisterandretrieve.com
10. Click **ALLOCATE LOCK TO HOLDER**

You will now see that the Lock has been Allocated.

K. How do I allocate a Lock to a Location?

1. Log in
2. Select the group you wish to edit in the **MANAGE LOCKS** drop down
3. Click the **blue arrow** button
4. Click **ADD A LOCK**
5. Enter Lock details
▶ 6. Click **ALLOCATE TO LOCATION**
7. Enter the Location details

IMPORTANT: Lock Holders can request replacement keys. If you would like an Administrator to approve the request before it is sent to Kensington click the ▶ **Require approval for replacement keys**

▶ 8. Click **ALLOCATE** (You will now see that the Lock has been Allocated)

L. How do I edit Lock Information like key code?

1. Log in
2. Select the group you wish to edit in the **MANAGE LOCKS** drop down
3. Click the **blue arrow** button
4. Click **VIEW/EDIT** next the Lock you wish to edit
▸ 5. Click **EDIT** next to **LOCK INFORMATION**
6. Update the details
▸ 7. Click **UPDATE**
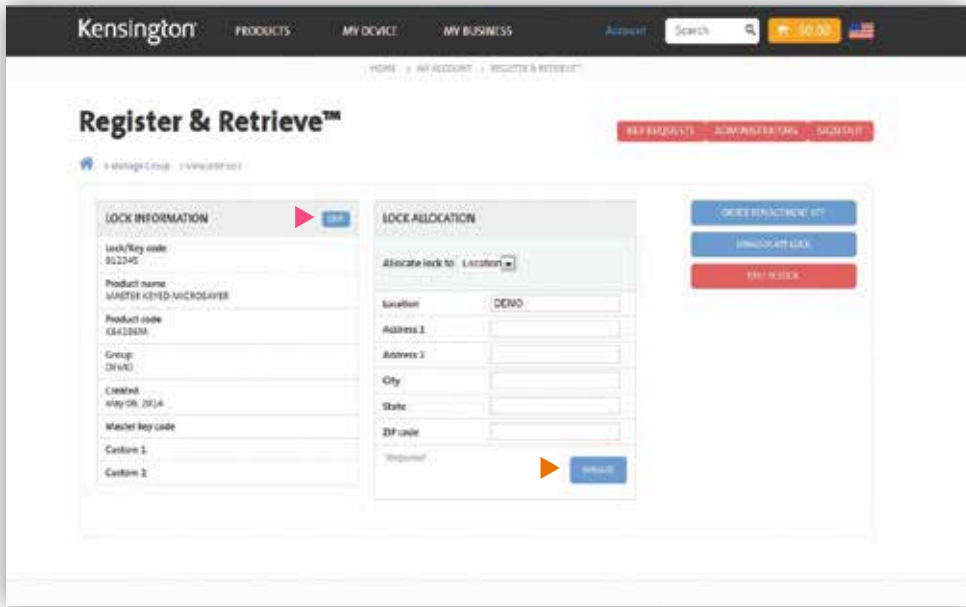
M. How do I edit a Lock Location?

1. Log in
2. Select the Group you wish to edit in the **MANAGE LOCKS** drop down
3. Click the **blue arrow** button
▶ 4. Click **VIEW/EDIT** next the Lock you wish to edit
5. Click **EDIT** next to **LOCK ALLOCATION**
6. Update the details
▶ 7. Click **UPDATE**

NOTE: If you want to edit the email that is sent to a Key Holder first update the Lock Holder information and click UPDATE. You can then select EDIT EMAIL TEXT

N. Lock Allocated to Location

O. Lock Allocated to Holder

P. How do I allocate a Lock from a Holder to a Location and vice versa?

1. Log in
2. Select the group you wish to edit in the **MANAGE LOCKS** drop down
3. Click the **blue arrow** button
4. Click **VIEW/EDIT** next the Lock you wish to edit
5. Click **EDIT** next to **LOCK ALLOCATION**
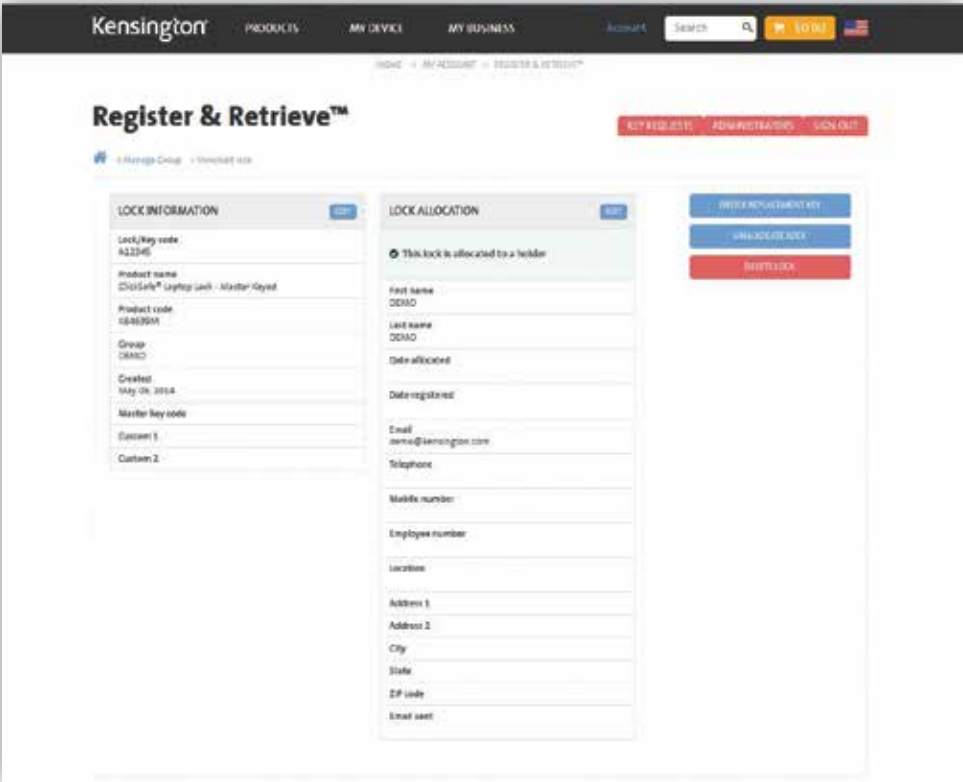▶ 6. Update the details
7. Click **UPDATE**

Q. How do I unallocate a Lock?

1. Log in
2. Select the group you wish to edit in the **MANAGE LOCKS** drop down
3. Click the **blue arrow** button
4. Click **VIEW/EDIT** next the Lock you wish to edit
▶ 5. Click **UNALLOCATE LOCK**
▶ 6. Confirm your selection
▶ 7. Your lock is now unallocated and available in the **UNALLOCATED** Tab
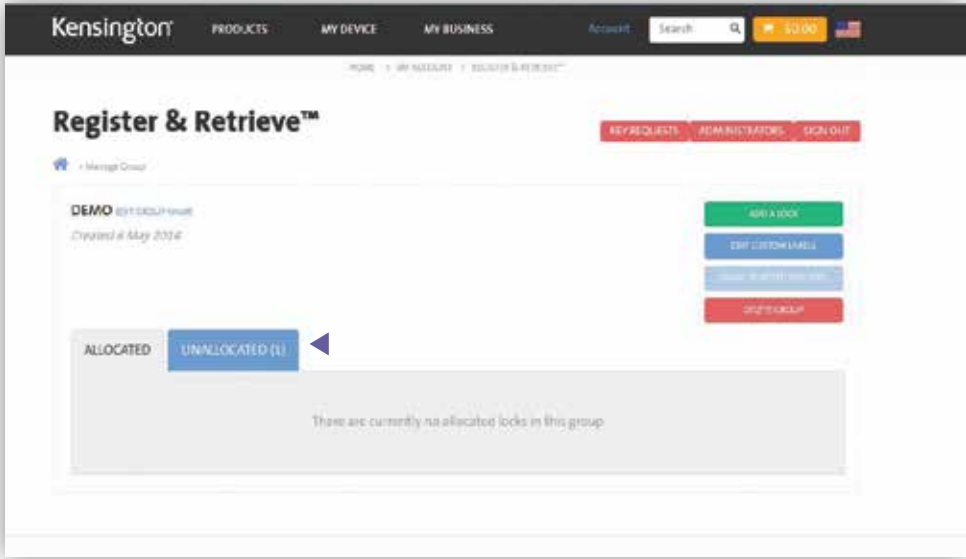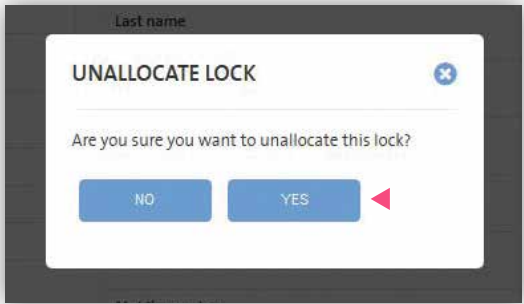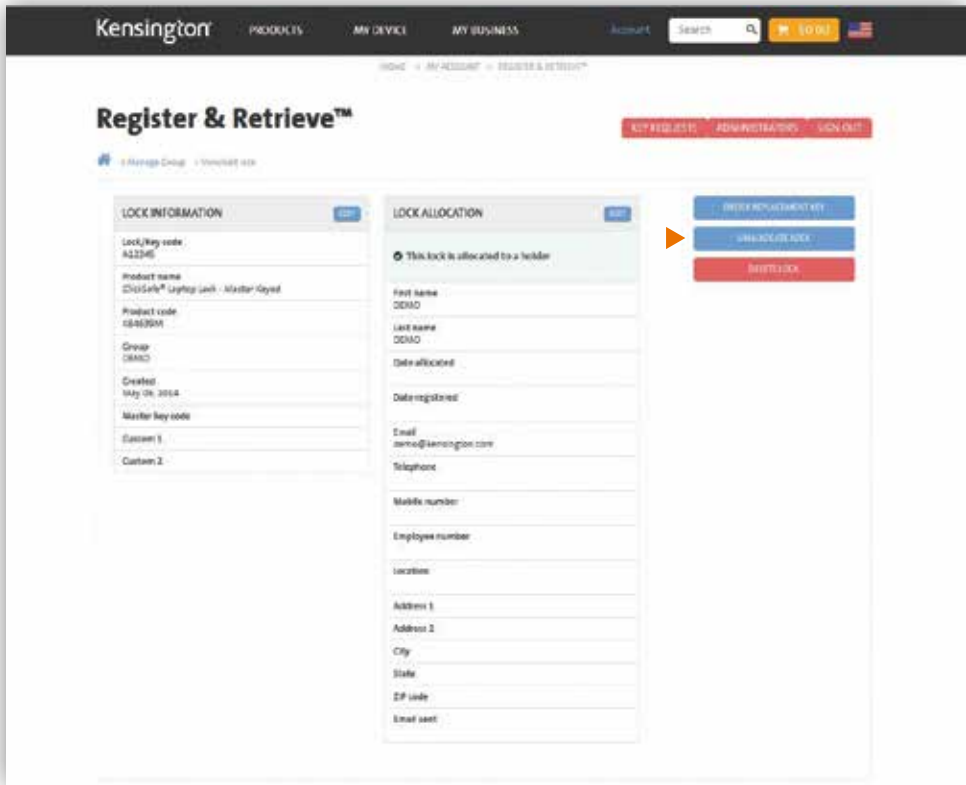
R. How do I move a Lock to a different Group?

A Lock can be moved from one Group to another. When moving a Lock it retains the information associated to it such as Location details and Key Code. A Lock can only be moved to a Group that already exists.

Scenario: You have decided to create a Group for each of your sales teams. A field sales person moves from TEAM A to TEAM B. You can use the MOVE Lock feature to move the Lock from GROUP TEAM A to GROUP TEAM B while retaining the setup information.

Alternatively you may have a group of spare unallocated Locks that you keep and allocate to new users as they join your business. You can register all the Lock Key Codes using the CSV tool and move the Lock, adding the Key Holders details, when you issue their Lock.

1. Log in
2. Select the group you wish to edit in the **MANAGE LOCKS** drop down
3. Click the **blue arrow** button
▸ 4. Click **VIEW/EDIT** next to the Lock you wish to move
▸ 5. Click **MOVE LOCK**
6. Select the Group that you wish to move the Lock to from the drop down
▸ 7. Click **MOVE**
8. Click **MANAGE THE GROUP** you have moved the Lock to or **BACK TO CURRENT GROUP**
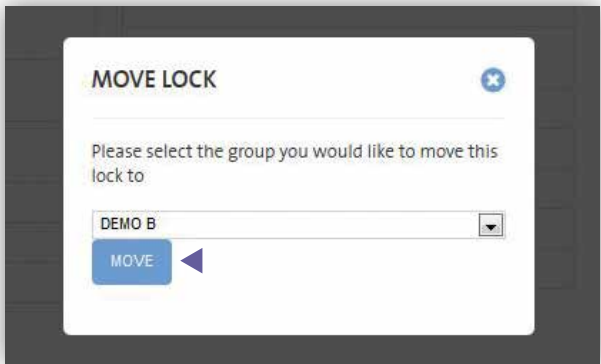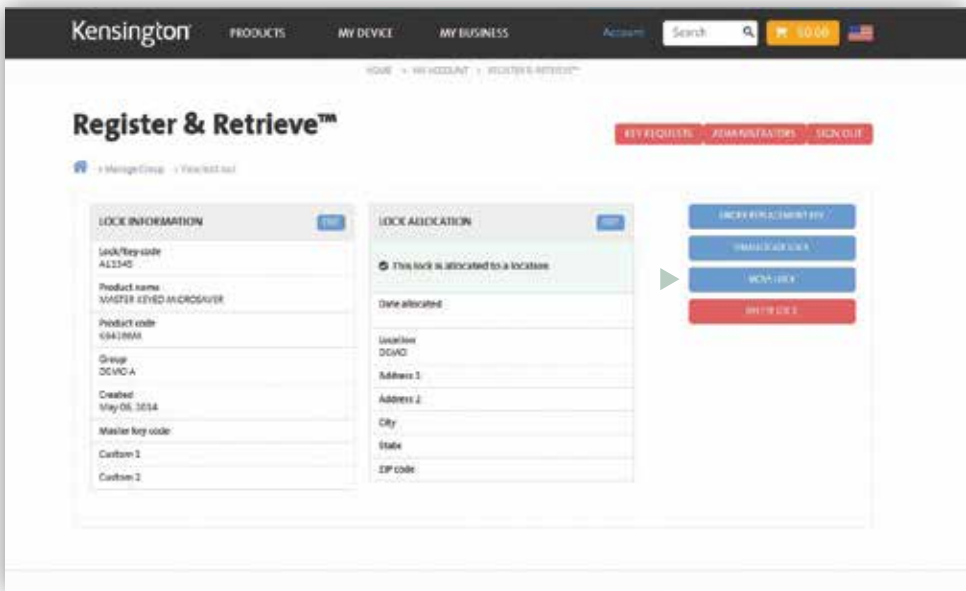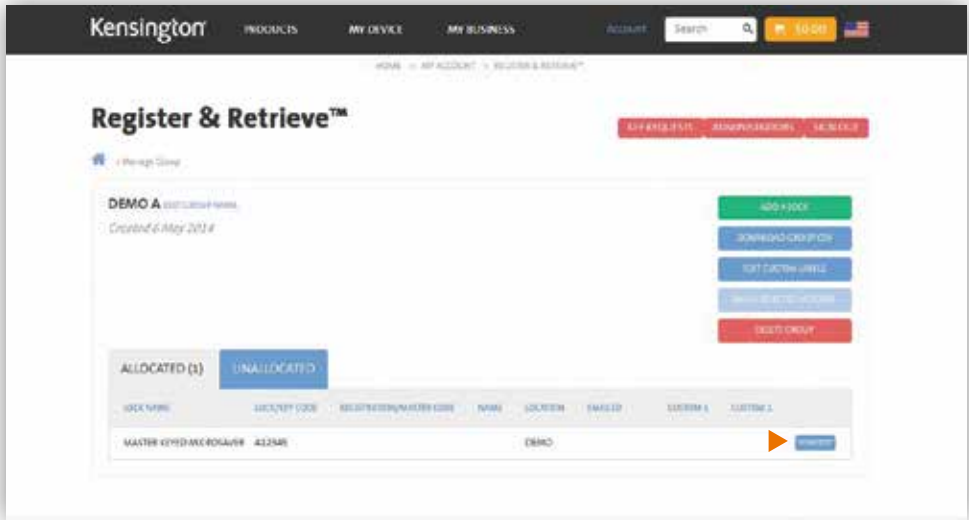
S. How do I edit the Custom labels in a Group?

1. Log in
2. Select the Group you wish to edit in the **MANAGE LOCKS** drop down
3. Click the **blue arrow** button
▶ 4. Click **EDIT CUSTOM LABELS**
5. Enter new label name/s
▶ 6. Click **UPDATE CUSTOM LABELS**

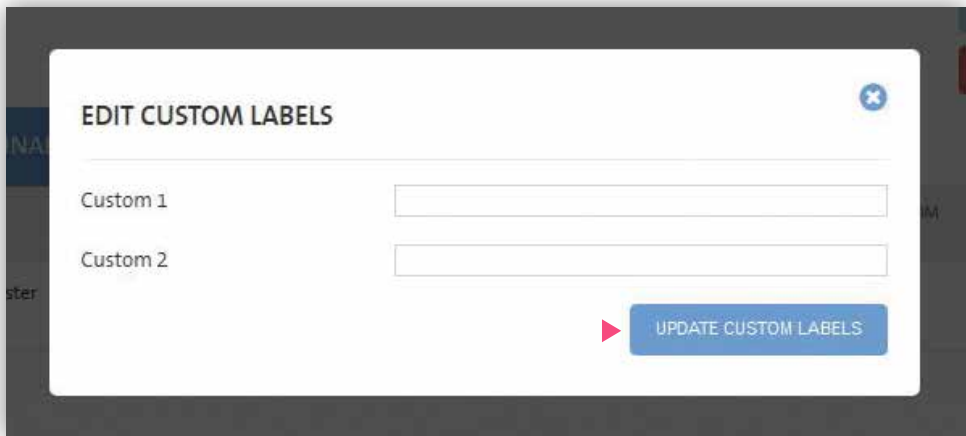**Note**: The label's names are now changed for all Locks in this Group. Label names are also updated in CSV downloads of Group data.
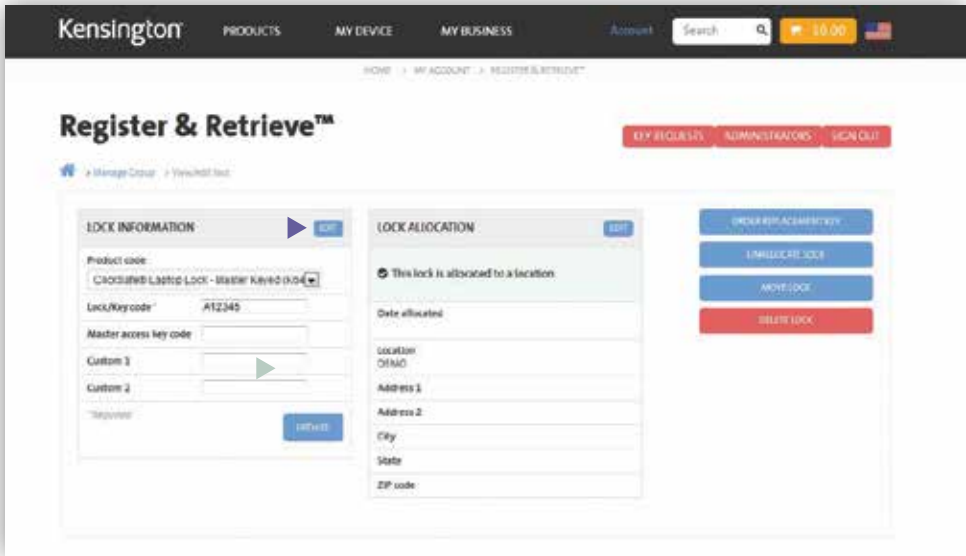

You can also edit custom labels by

1. Log in
2. Select the Group you wish to edit in the **MANAGE LOCKS** drop down
3. Click the **blue arrow** button
4. Click **VIEW/EDIT** next the Lock you wish to edit
▶ 5. Click **EDIT** next to **LOCK INFORMATION**
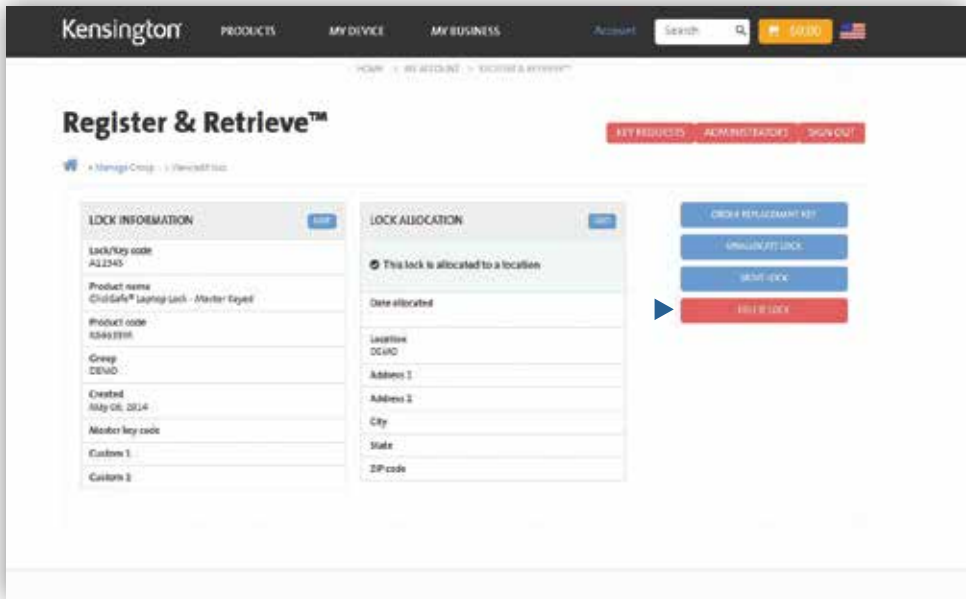6. Update the details
▶ 7. Click **UPDATE**

T. How do I delete a Lock?

1. Log in
2. Locate the Lock you wish to delete using the search tool or from with a particular Group
3. Click **VIEW**
▶ 4. Click **DELETE LOCK**
5. Confirm your choice

U. How do I order a Replacement Key? (Administrator view)

Administrators can order Replacement Keys free of charge. This is a service provided at Kensington's discretion. Replacement Keys can take up to 28 days to be delivered and longer during seasonal periods such as Christmas and Chinese New Year.

1. Log in
2. Locate the Lock you wish to delete using the search tool or from within a particular Group
3. Click **VIEW**
4. Click **ORDER REPLACEMENT KEY**
5. Enter the delivery details

Note: If previously registered the address details of a Lock will be presented to the Administrator. These can be changed if necessary.
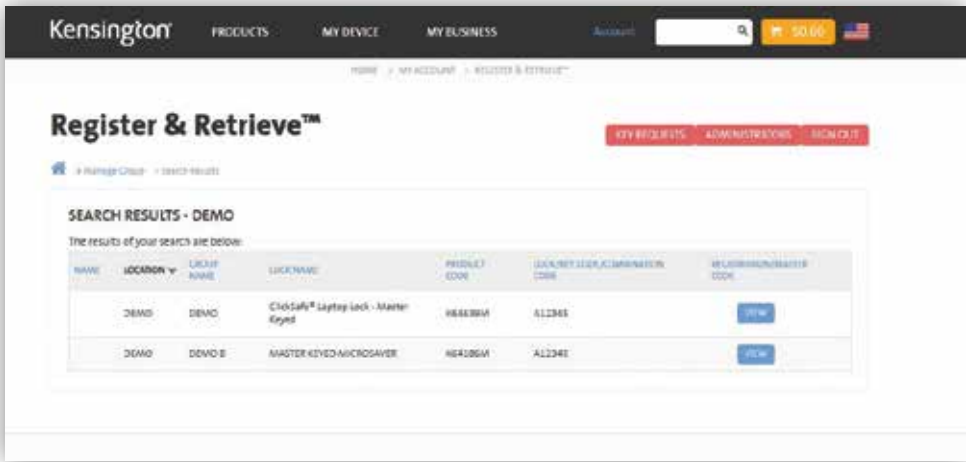

V. How can I search for a Lock?

You can search for a Lock for which you are either a Holder or an Administrator using the following fields:

- Key Holder First Name
- Key Holder Last Name
- Location Name
- Group Name
- Key Code
- Master Code

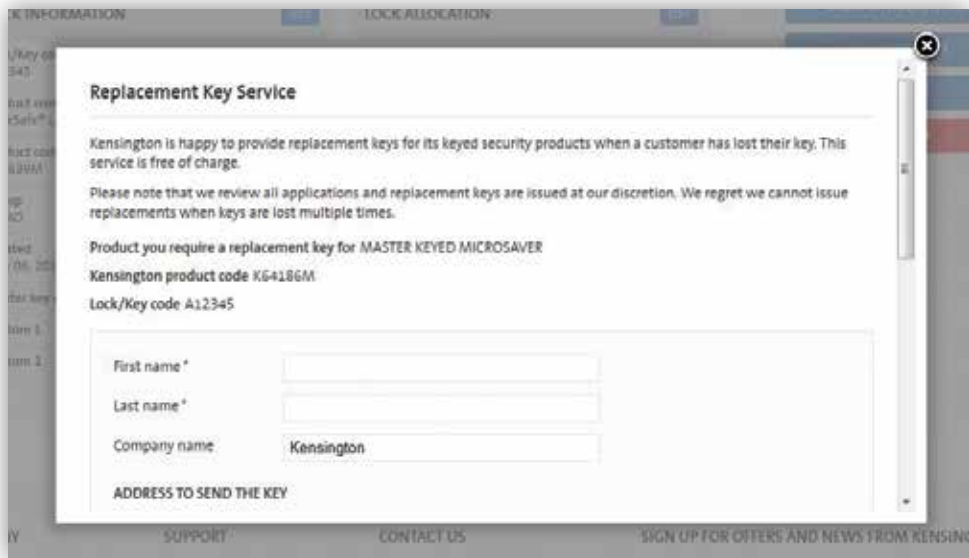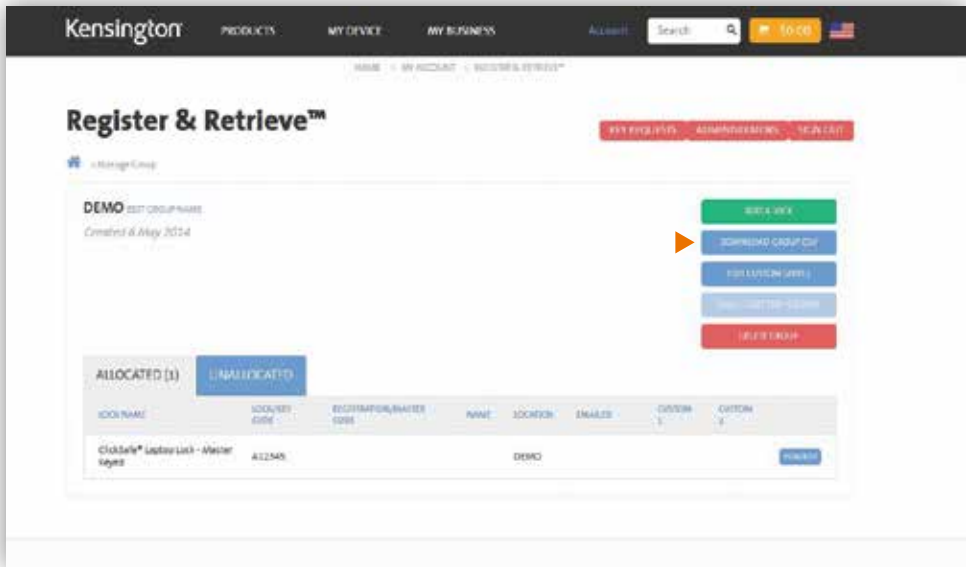**Note**: you can search using upper or lower case

1. Log in
2. Enter your search term
3. Click the **blue arrow**

W. How can I download my data?

You can download data by Group

1. Log in
2. Select the group you wish to edit in the **MANAGE LOCKS** drop down
3. Click the **blue arrow** button
▶ 4. Click **DOWNLOAD GROUP CSV**

X. How does a Key Holder order a Replacement Key?

1. Login
2. Select Lock
3. Click **ORDER REPLACEMENT KEY**
4. Enter details
5. Click **REQUEST REPLACEMENT KEY**

Note: If the Key Holder is set up to require approval the Administrator will be alerted. If not the request will come through to Kensington. Should we have reason to contact you prior to approving your request we will use the contact details registered against the Key Holders Account.

Y. How do I approve a Replacement Key request?

If a user requests a Replacement Key and it requires Administrator approval, the Administrators will each receive an email prompting you to approve or reject the request.
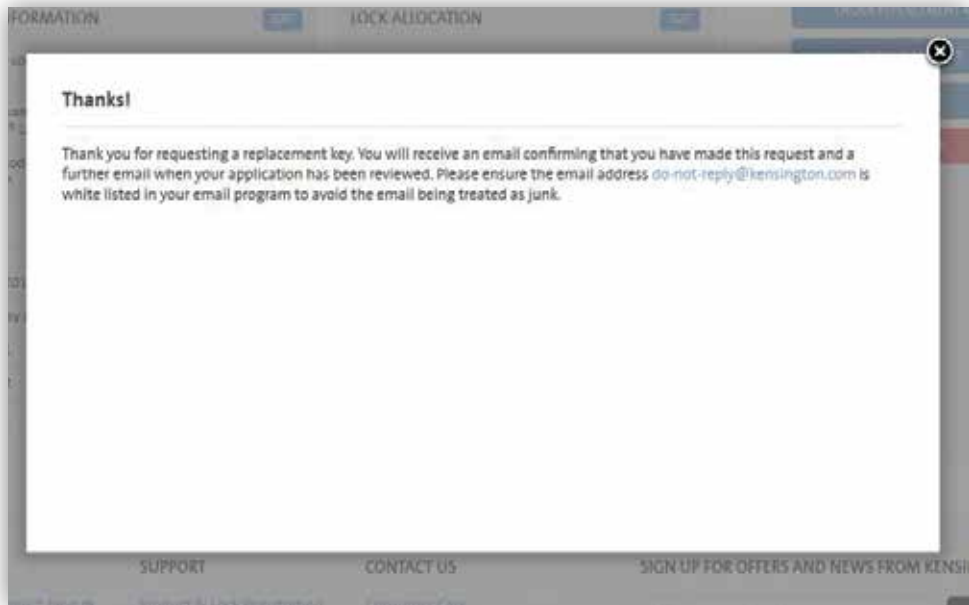
A user will have had the opportunity to enter their requested delivery address.

Once they submit their request they see this message.

Z. FAQs

What do I do if I have problems or questions after consulting the how to guide?

In the first instance contact your primary Kensington contact.

A Replacement Key was ordered more than 5 weeks ago. Where is it?

In the first instance contact your primary Kensington contact. We will be able to confirm if the order was placed and provide a tracking ID. Do not simply order again.

How secure is the portal?

Your data is secured using the latest best practice methods. We use 128bit encryption with authenticated CSC SSL certification. Passwords are never sent with their user name and are hashed and salted to defeat code breakers. Ultimately it is your responsibility to keep your password safe. Never write it down.

What is the Key Replacement approval process?