KEY & ACCESS CONTROL

TRAINING

UCONN

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- Add Cores
- Add New Key
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- New Key Copy
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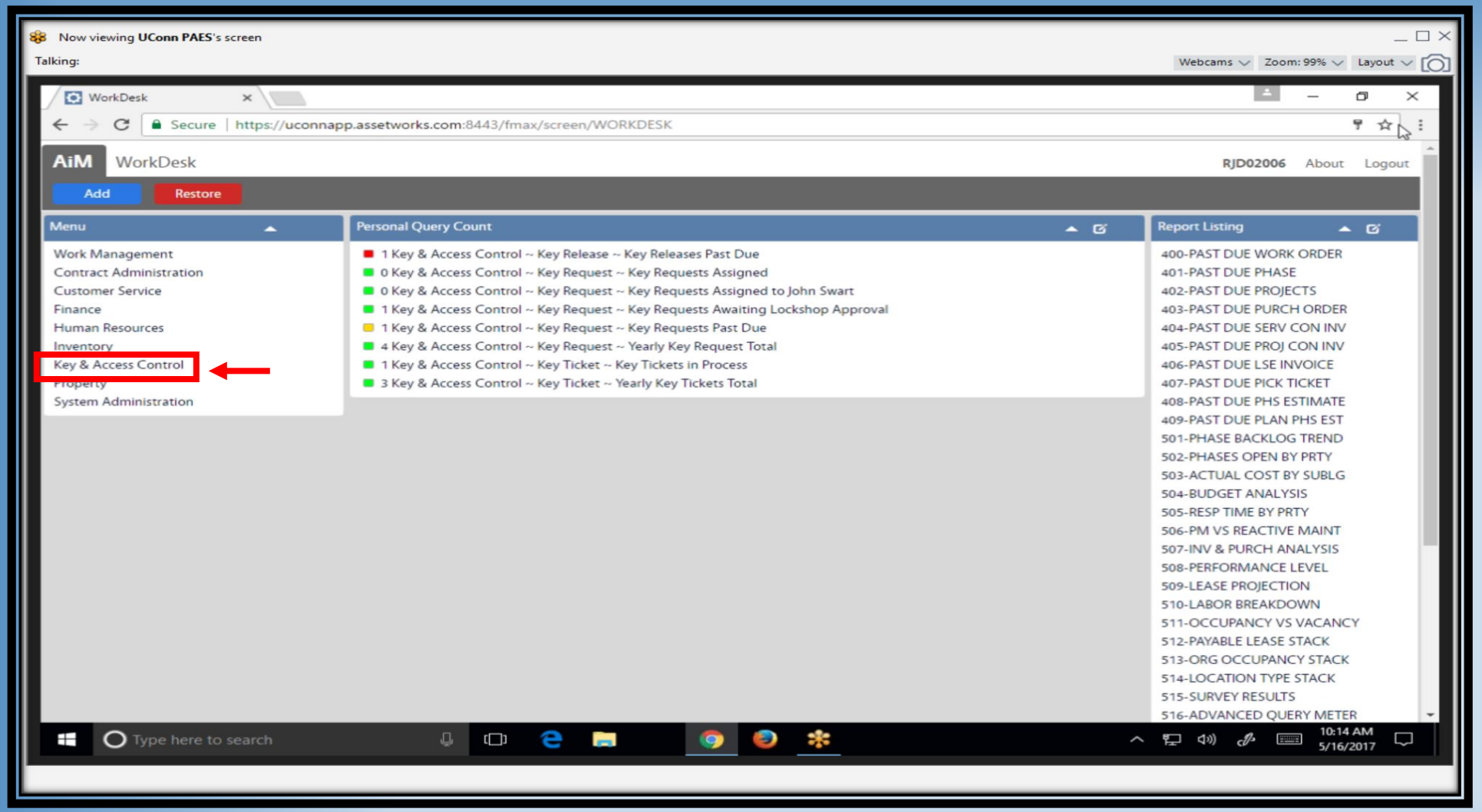
New Key or Card Access Request

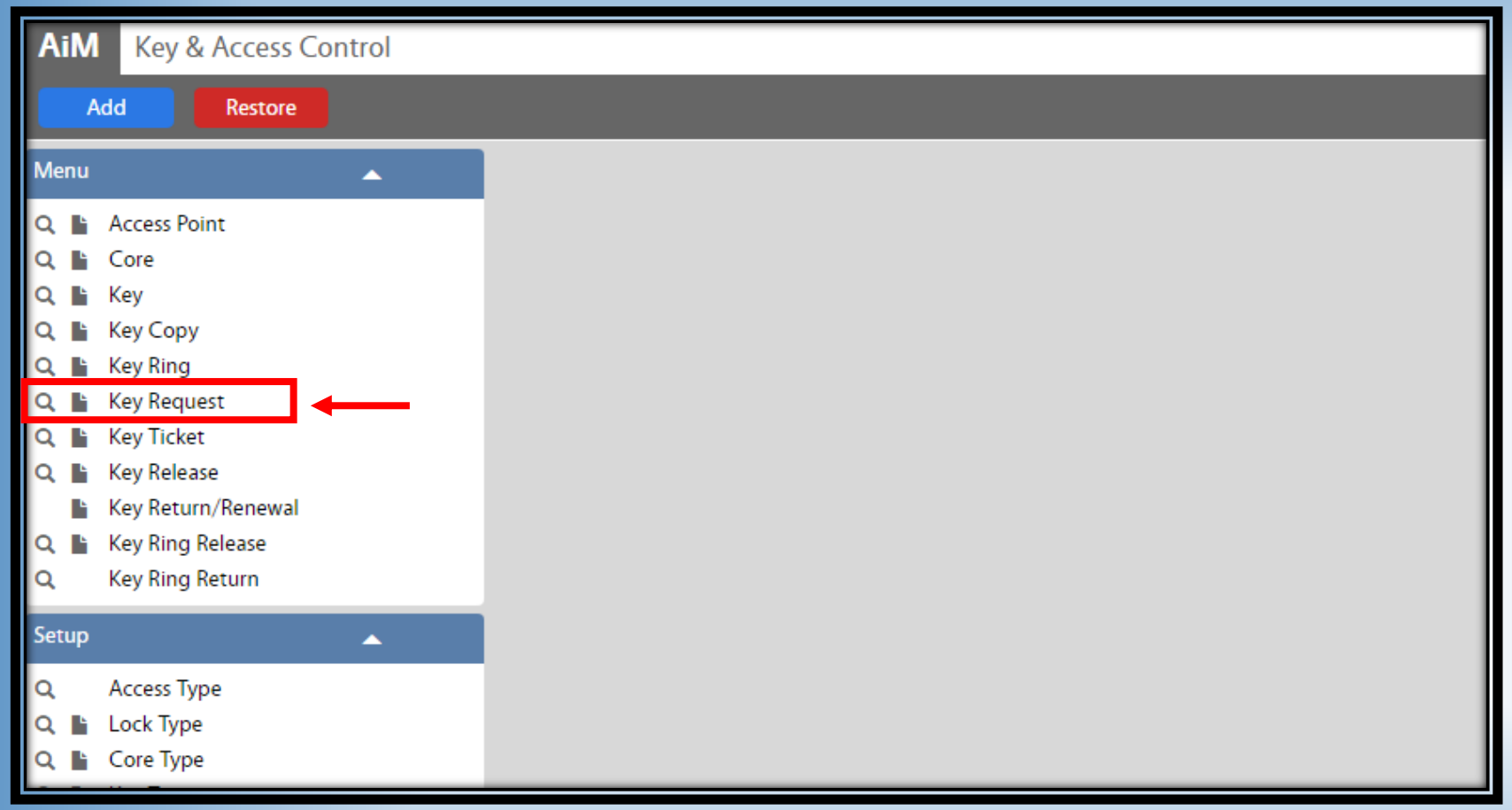
Key Request

Step 1: Create a Key Request



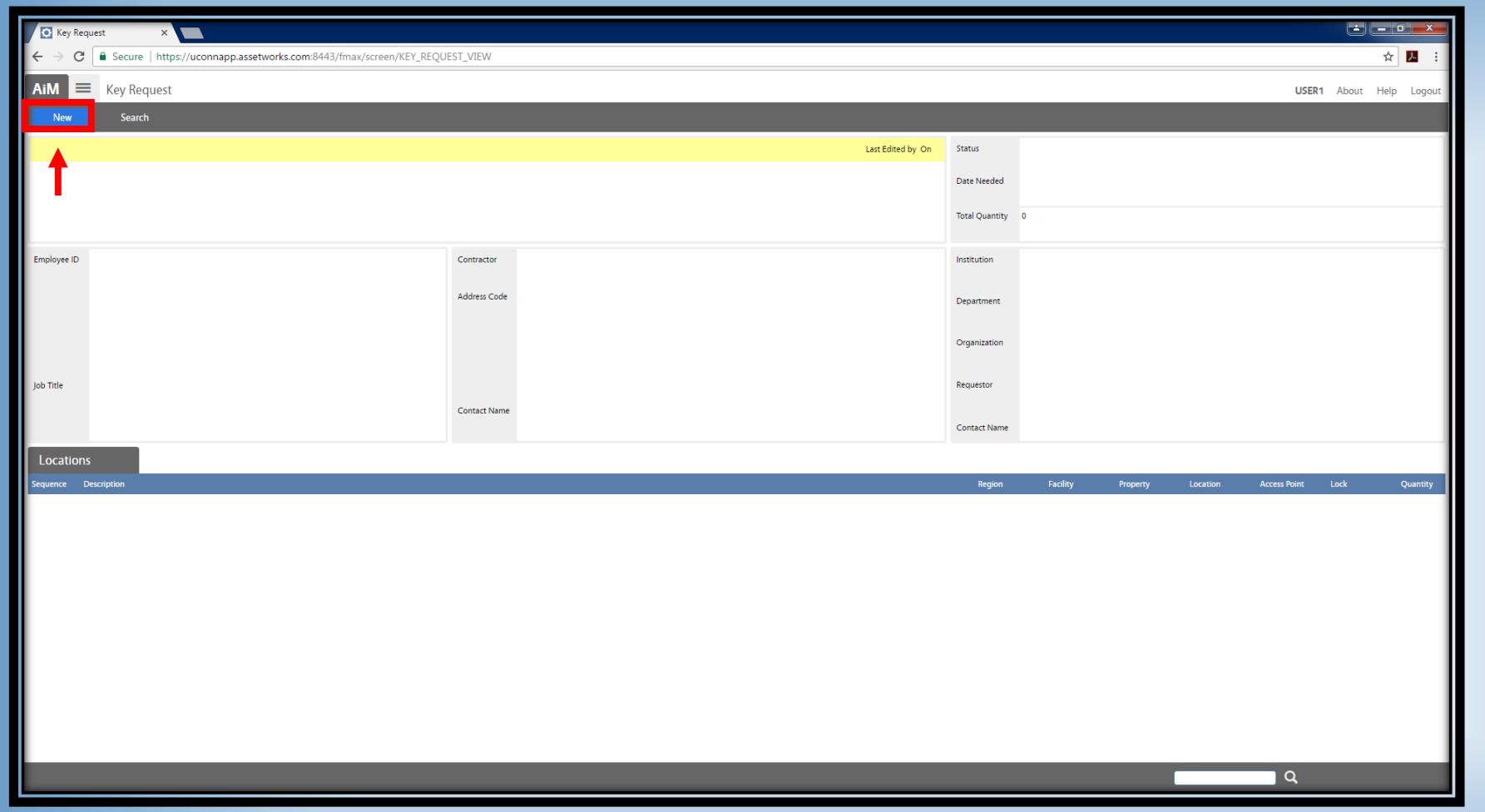
On WorkDesk click *Key & Access Control* module

New Key or Card Access Request – Create a Key Request



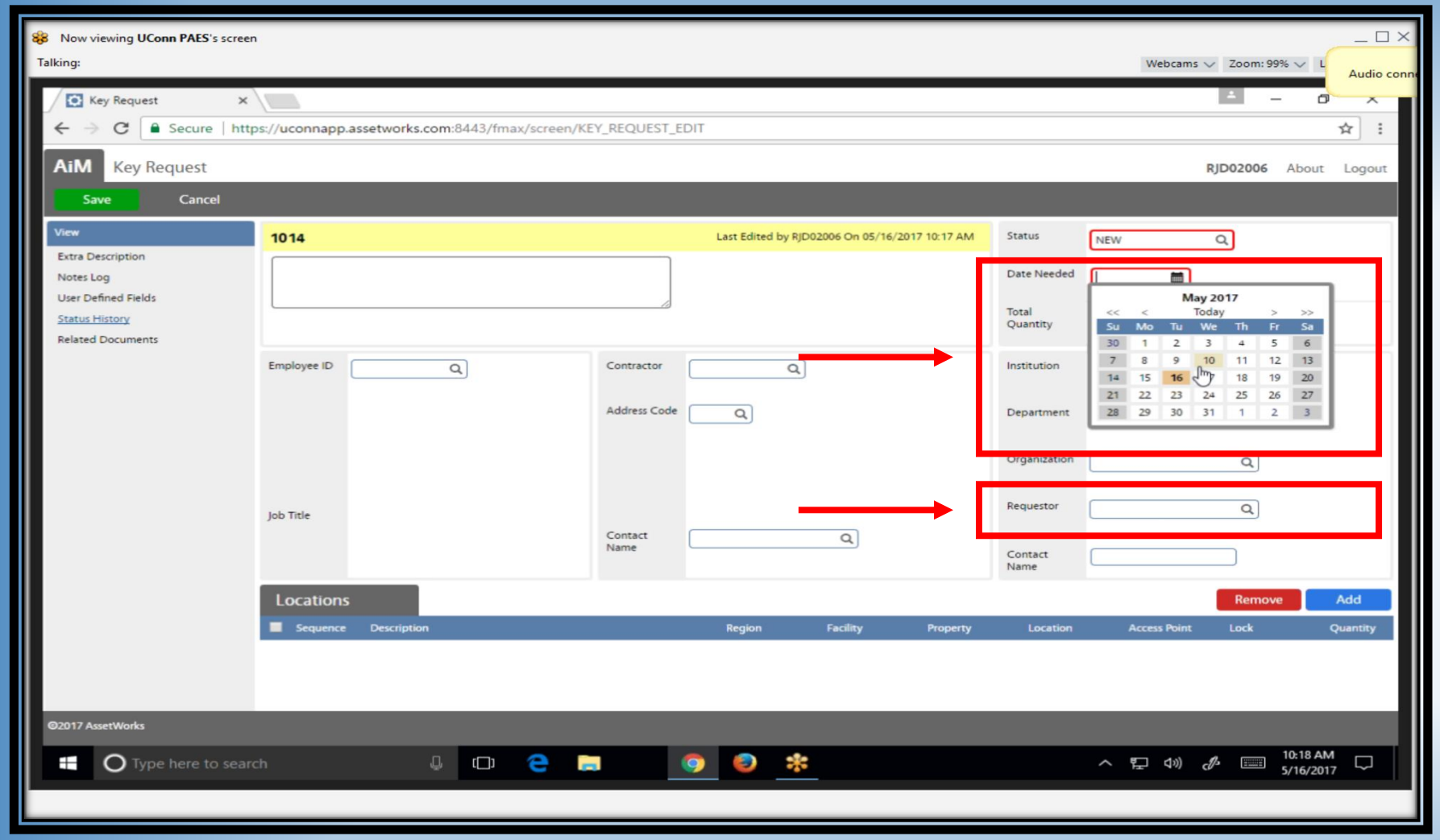
Click Key Request

New Key or Card Access Request – Create a Key Request



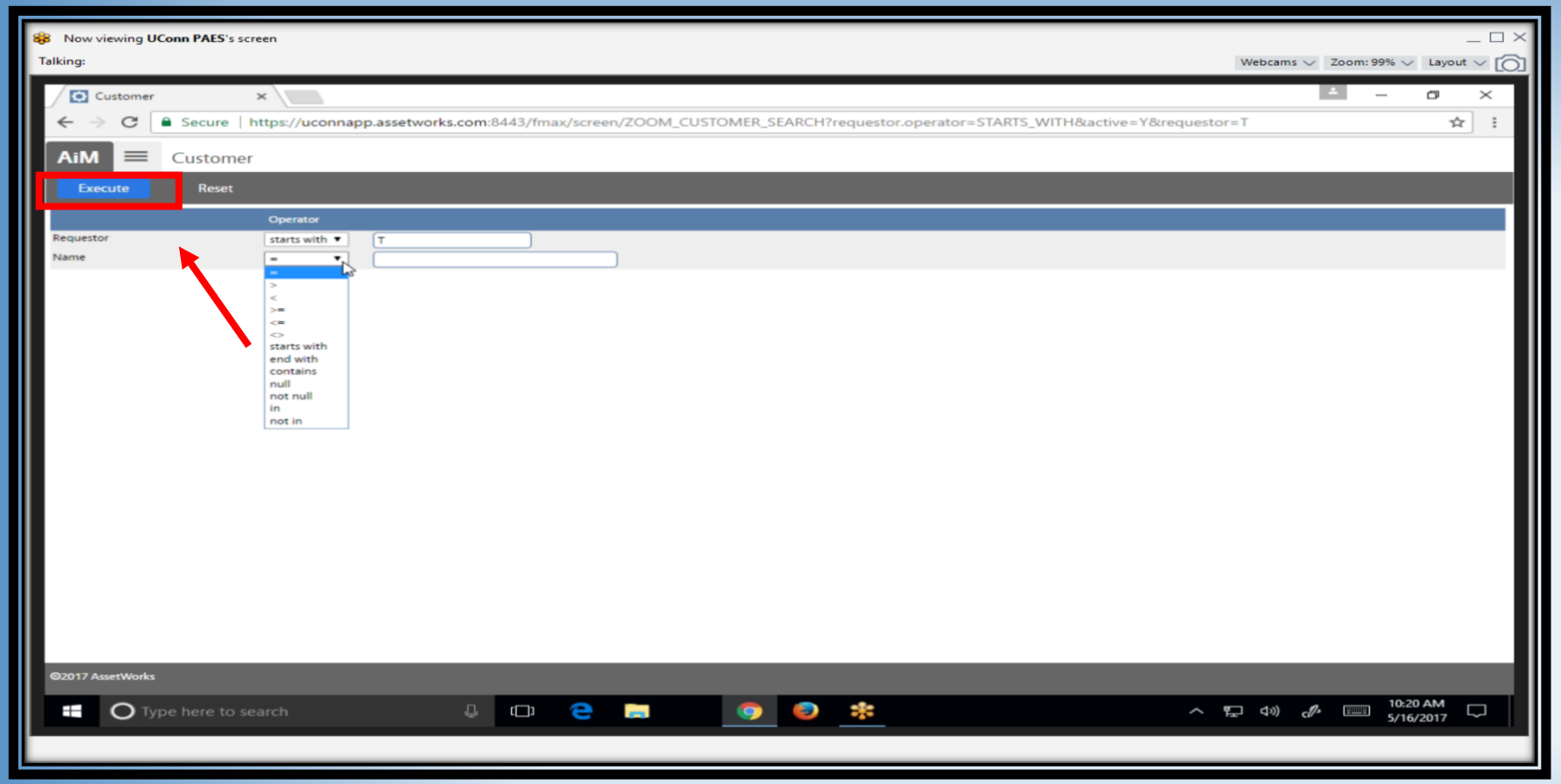
Click *New*

New Key or Card Access Request – Create a Key Request



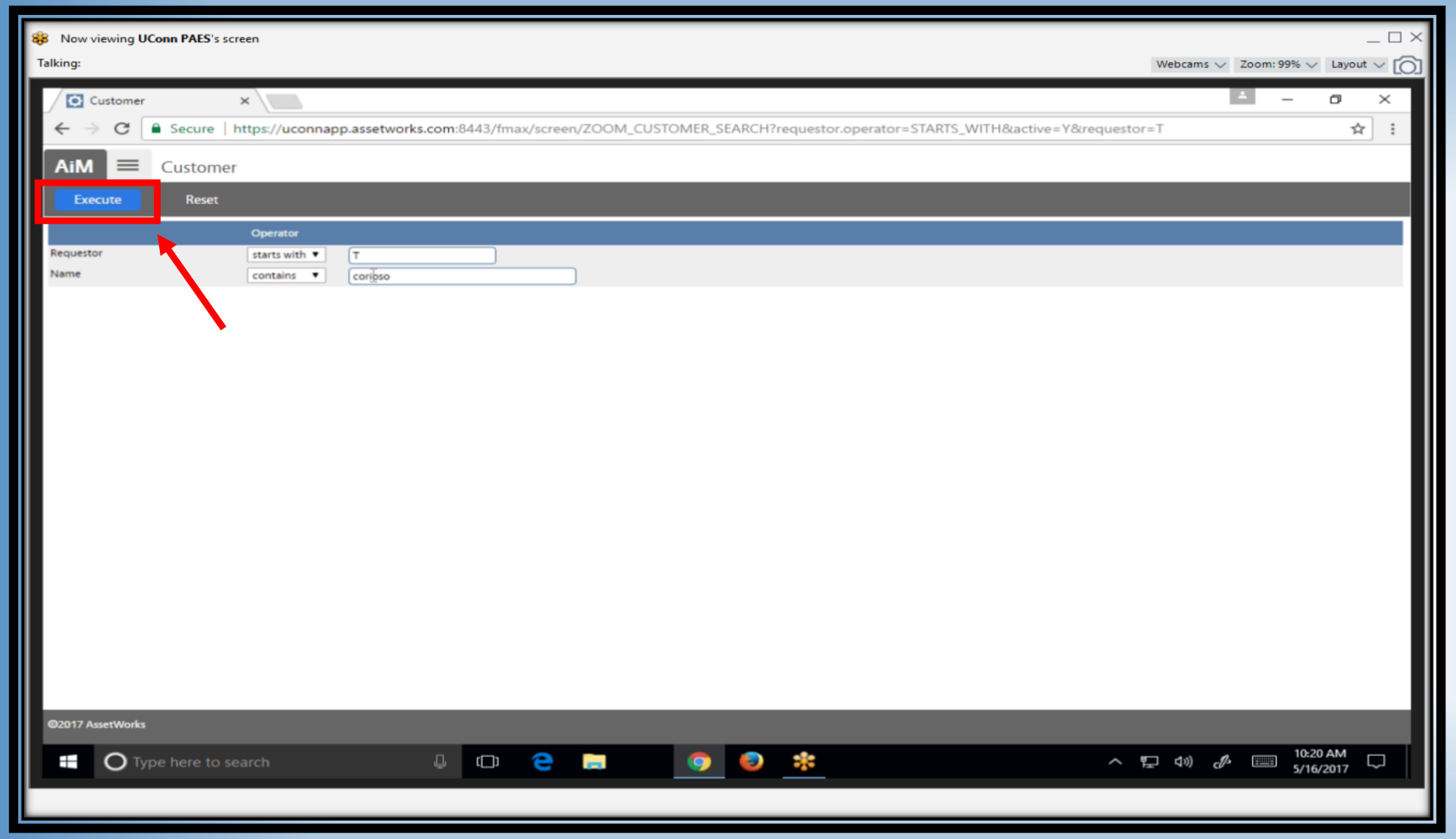
Enter Date Needed, then search Requestor

New Key or Card Access Request – Create a Key Request



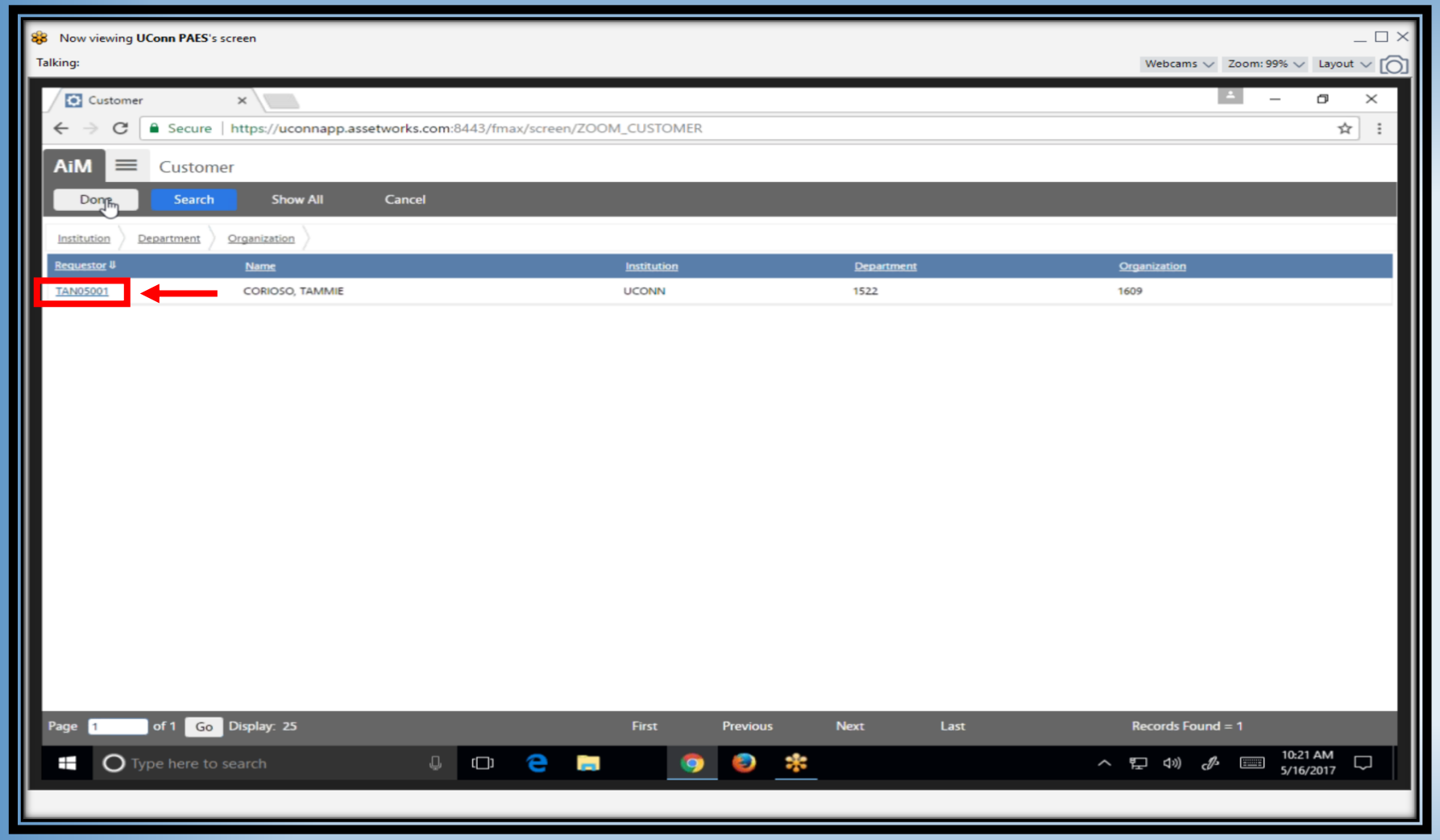
Select the appropriate search operator to search by Requestor & Name, then click ***Execute.***

New Key or Card Access Request – Create a Key Request



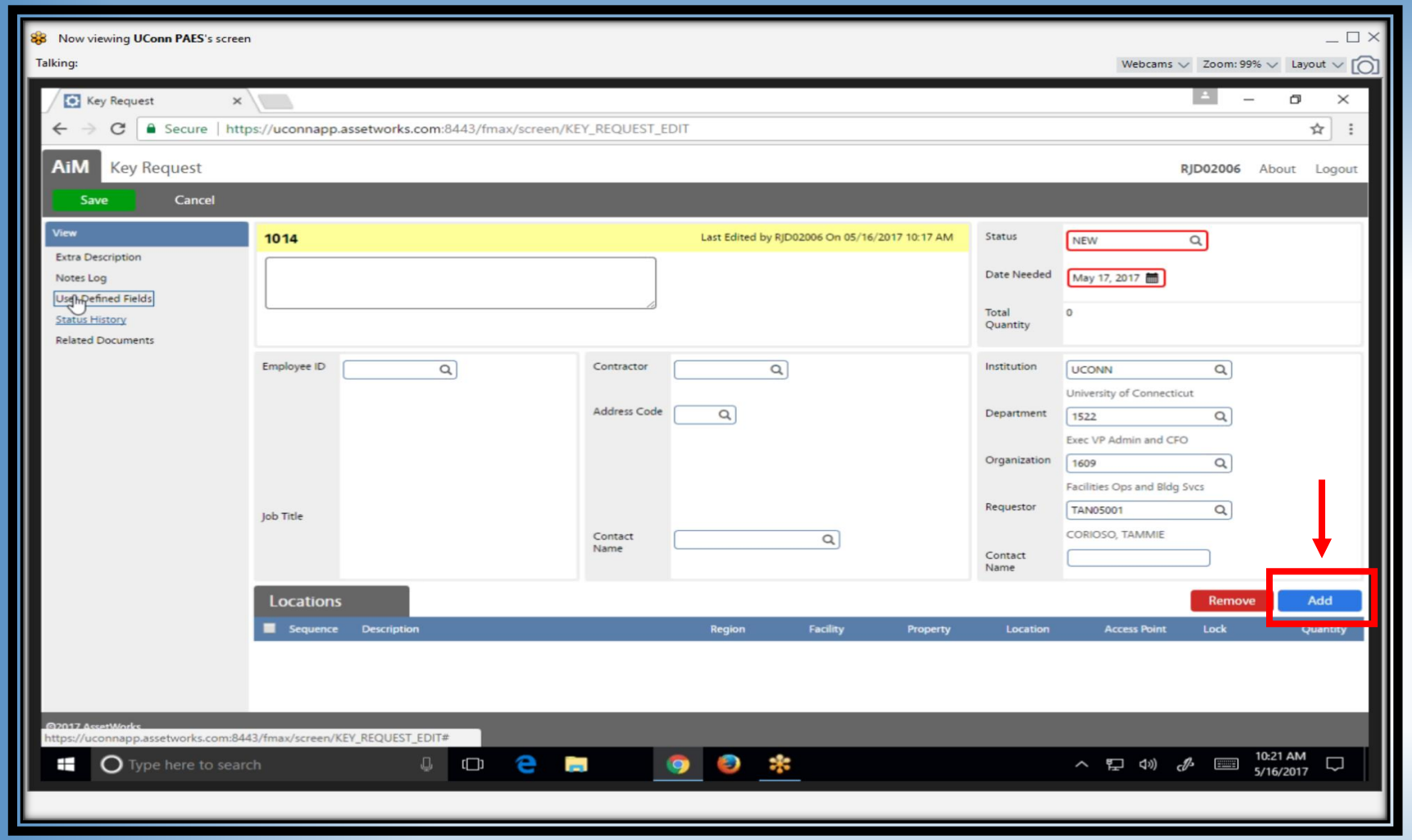
Enter Requestor & Name search criteria, then click ***Execute.***

New Key or Card Access Request – Create a Key Request



Select Requestor's Net ID

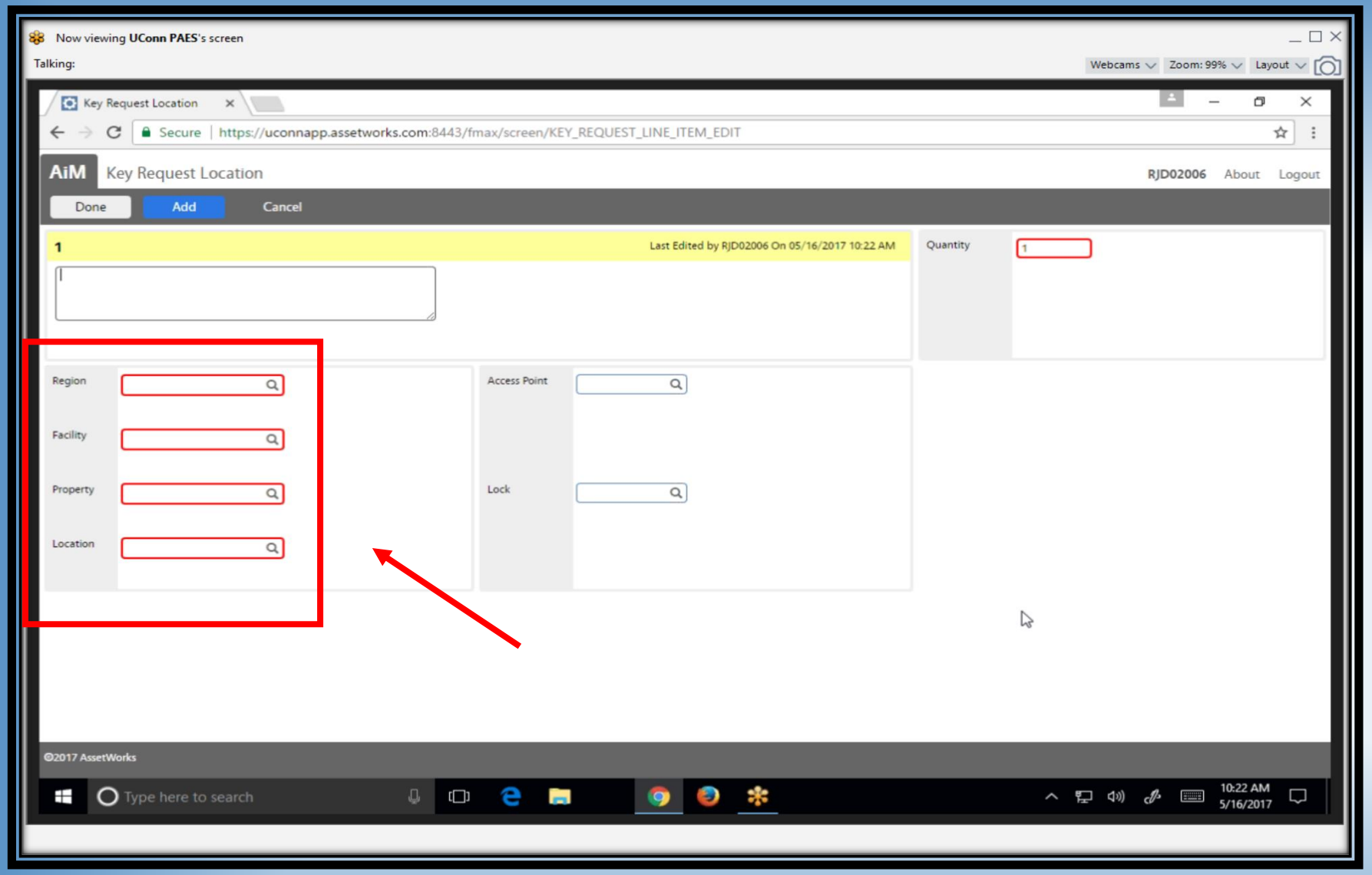
New Key or Card Access Request – Create a Key Request



Note: Institution, Department, Organization information is automatically populated

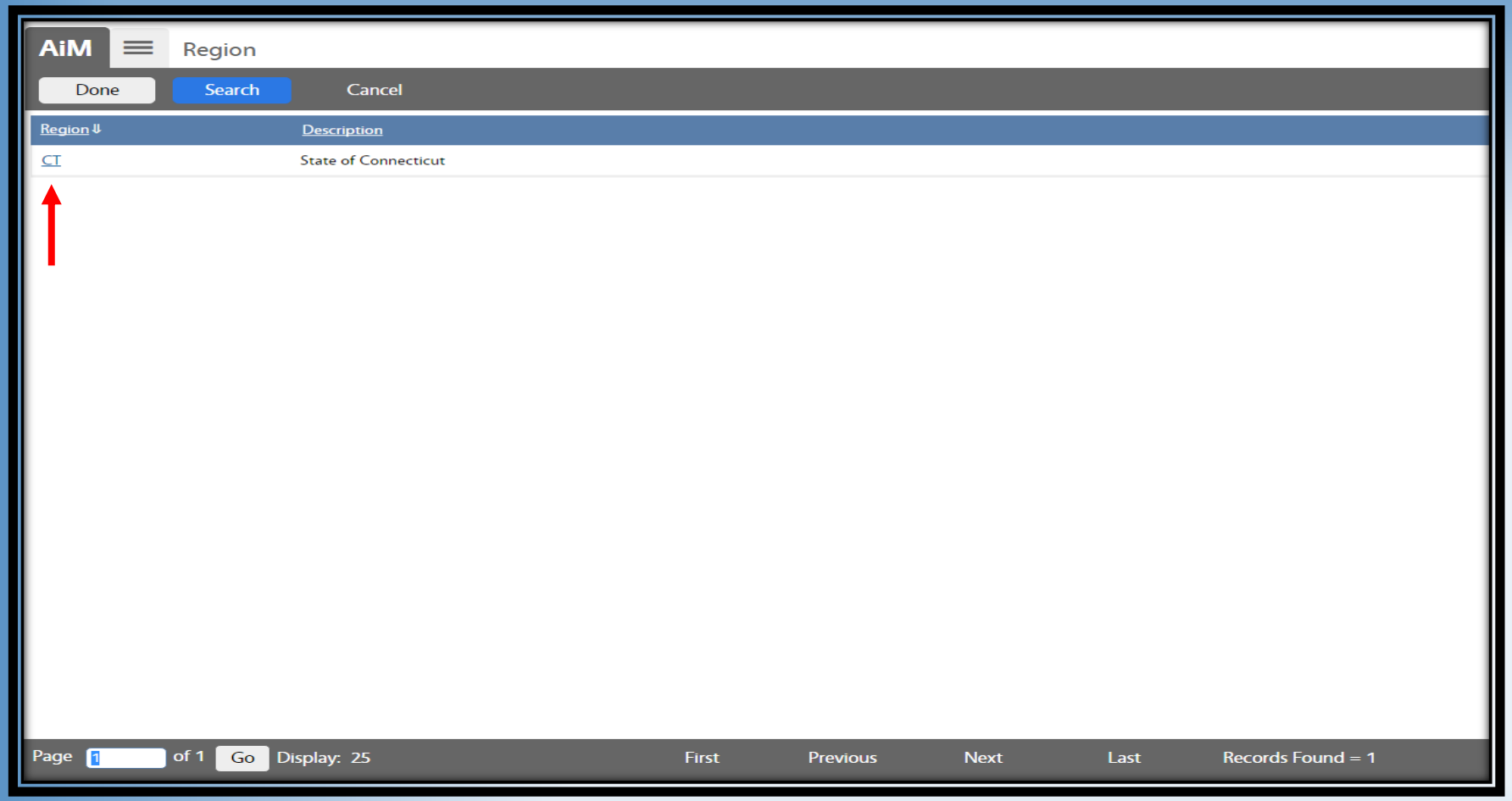
Click **Add** button to add locations

New Key or Card Access Request – Create a Key Request



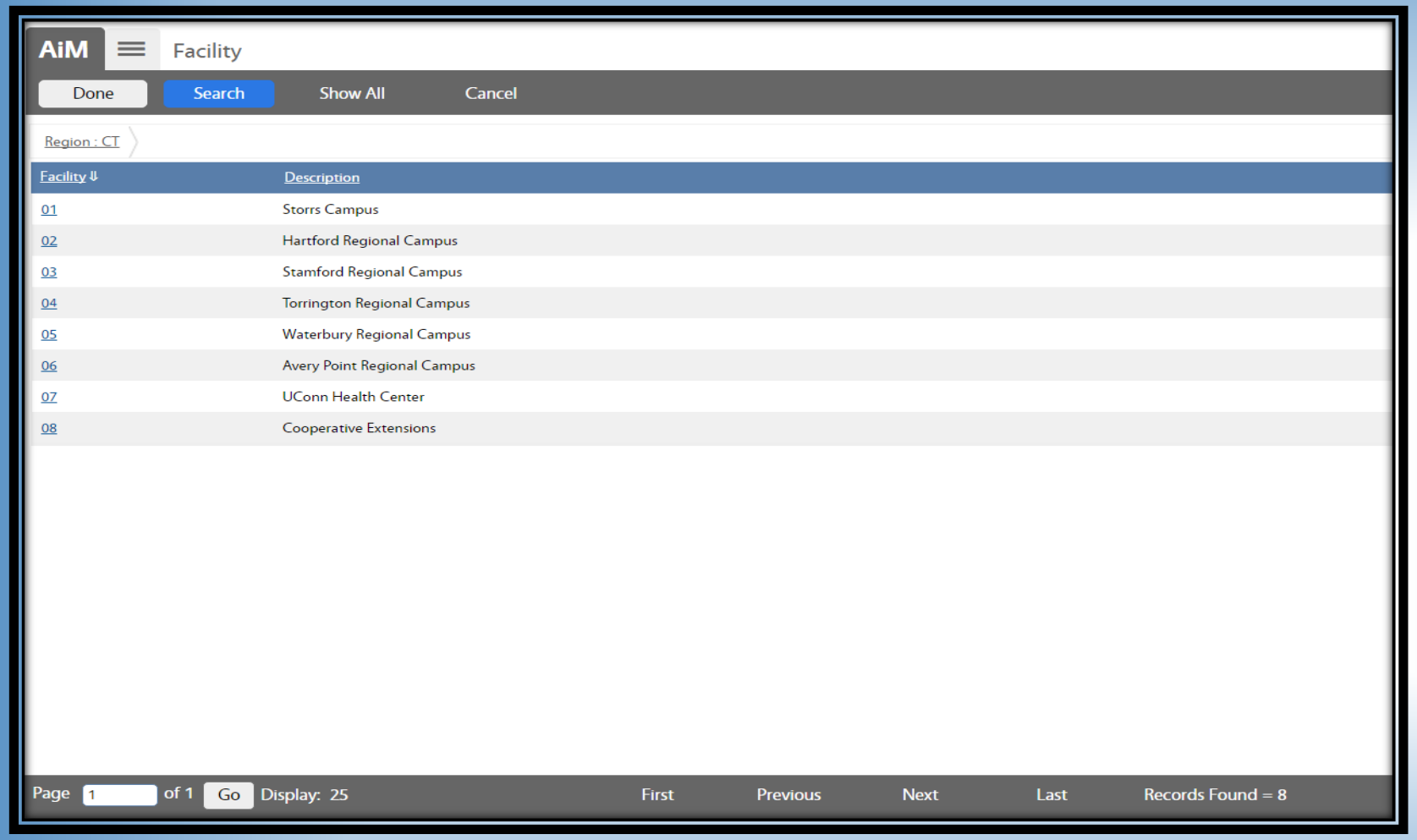
Search Region, Facility and Property information

New Key or Card Access Request – Create a Key Request



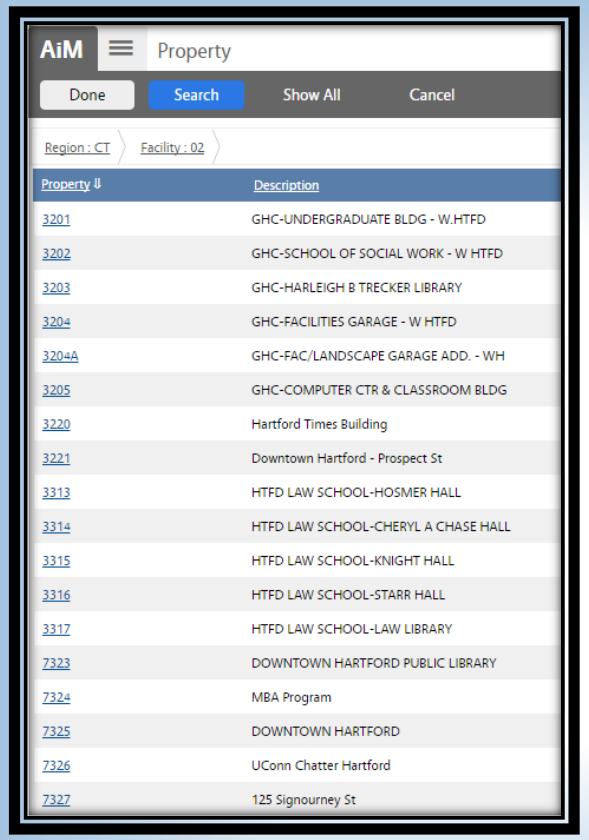
Click on CT region

New Key or Card Access Request – Create a Key Request



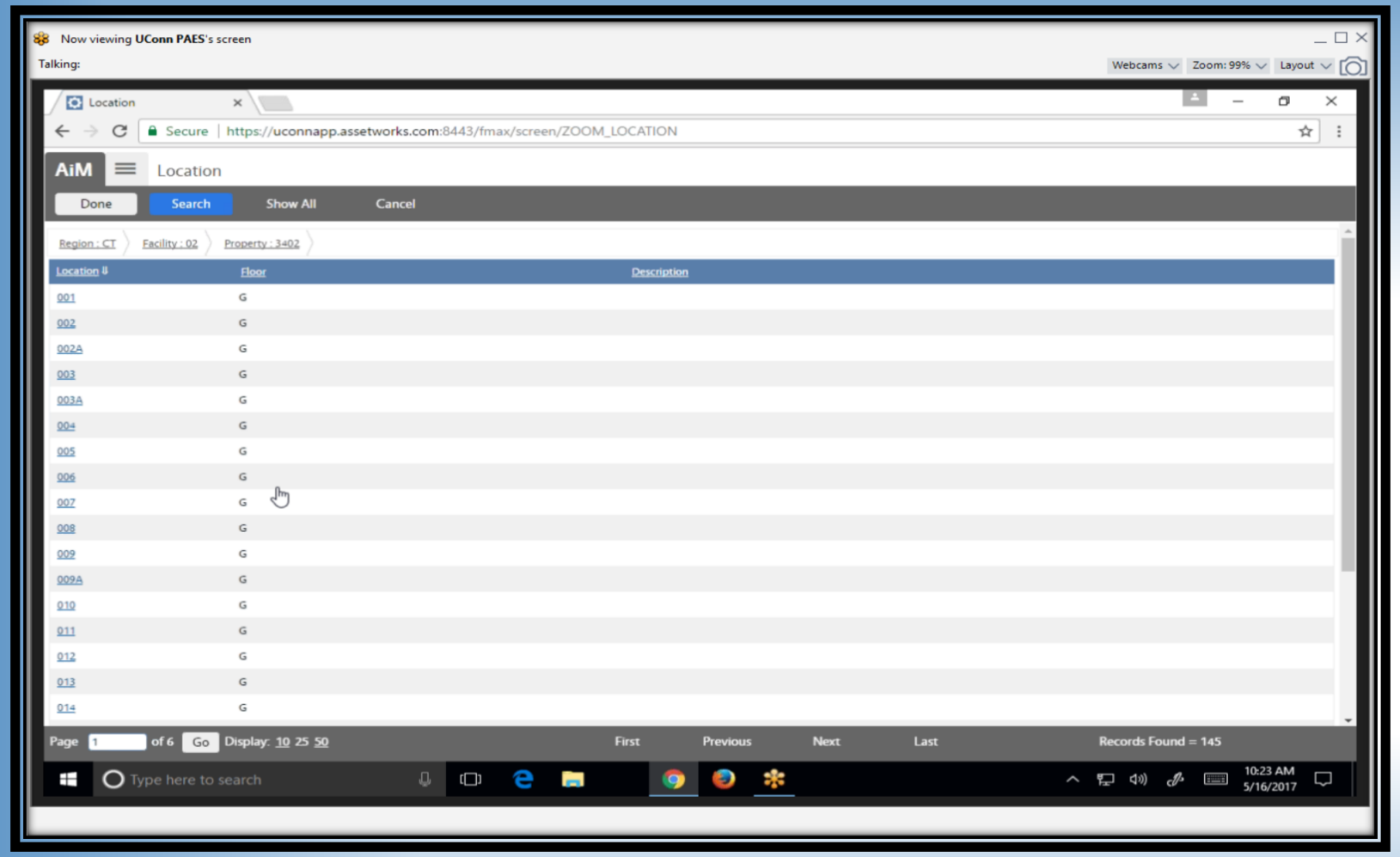
Click on Facility ID

New Key or Card Access Request – Create a Key Request



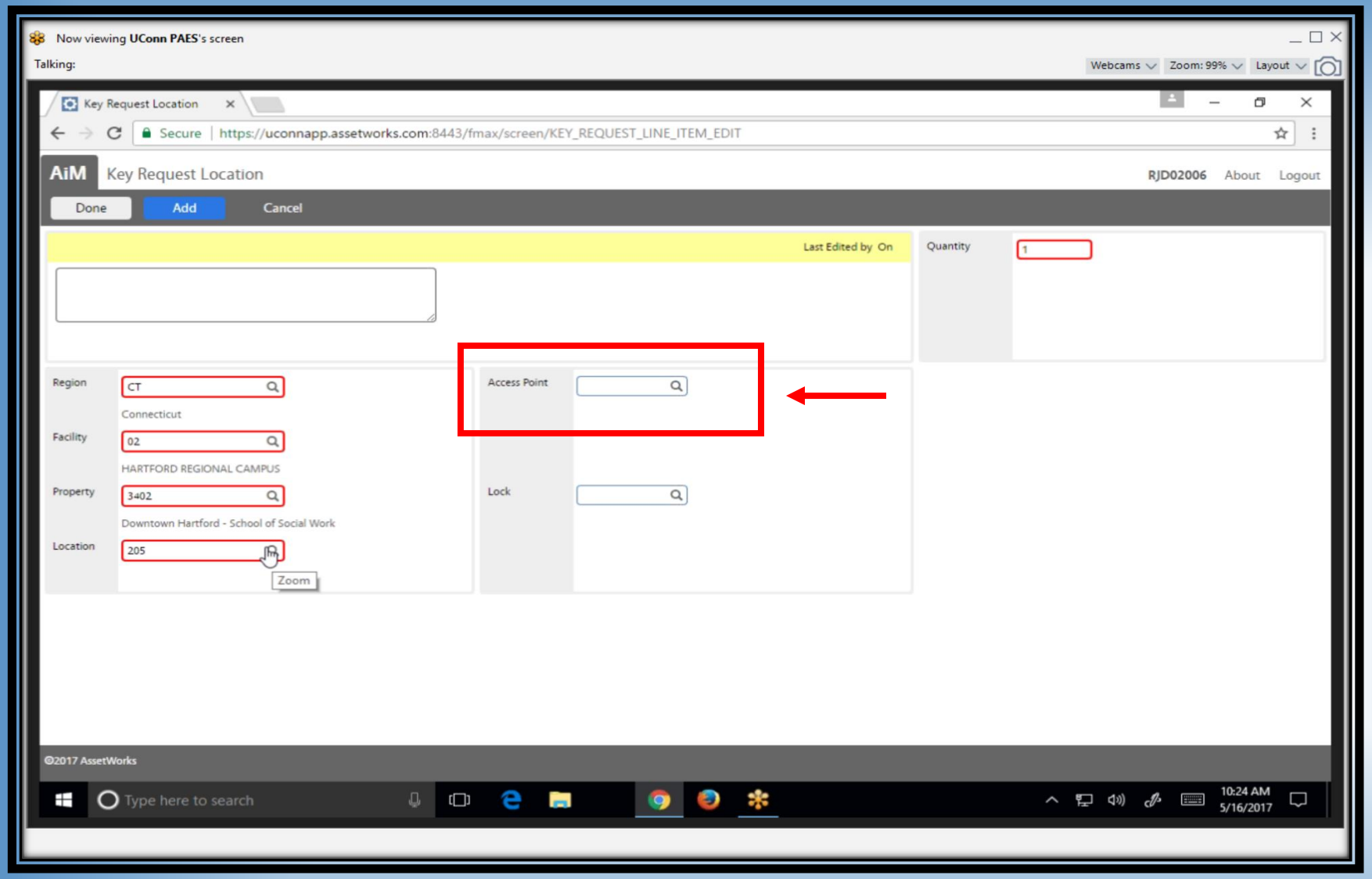
Click on Property ID

New Key or Card Access Request – Create a Key Request



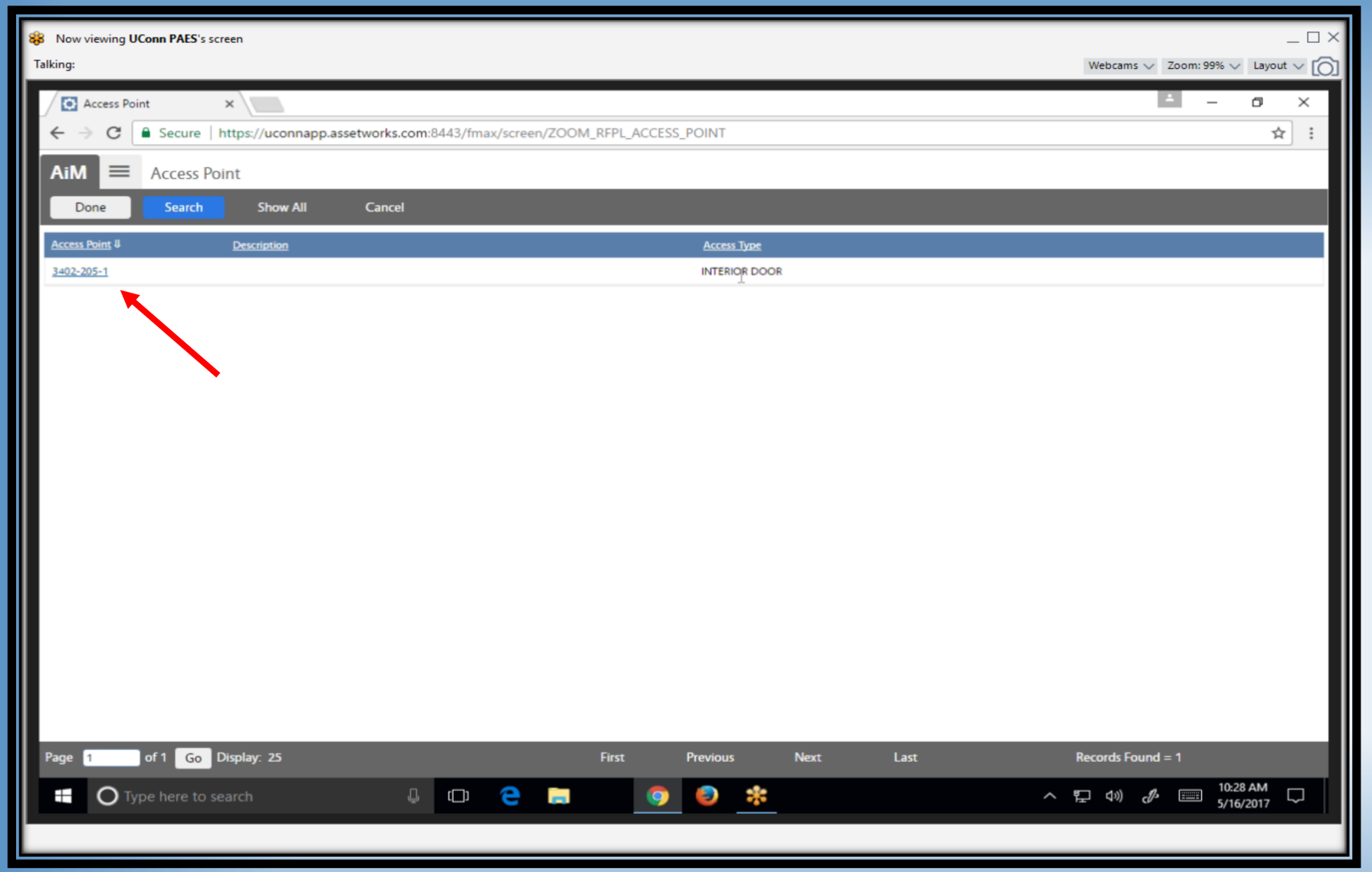
Click on Location ID

New Key or Card Access Request – Create a Key Request



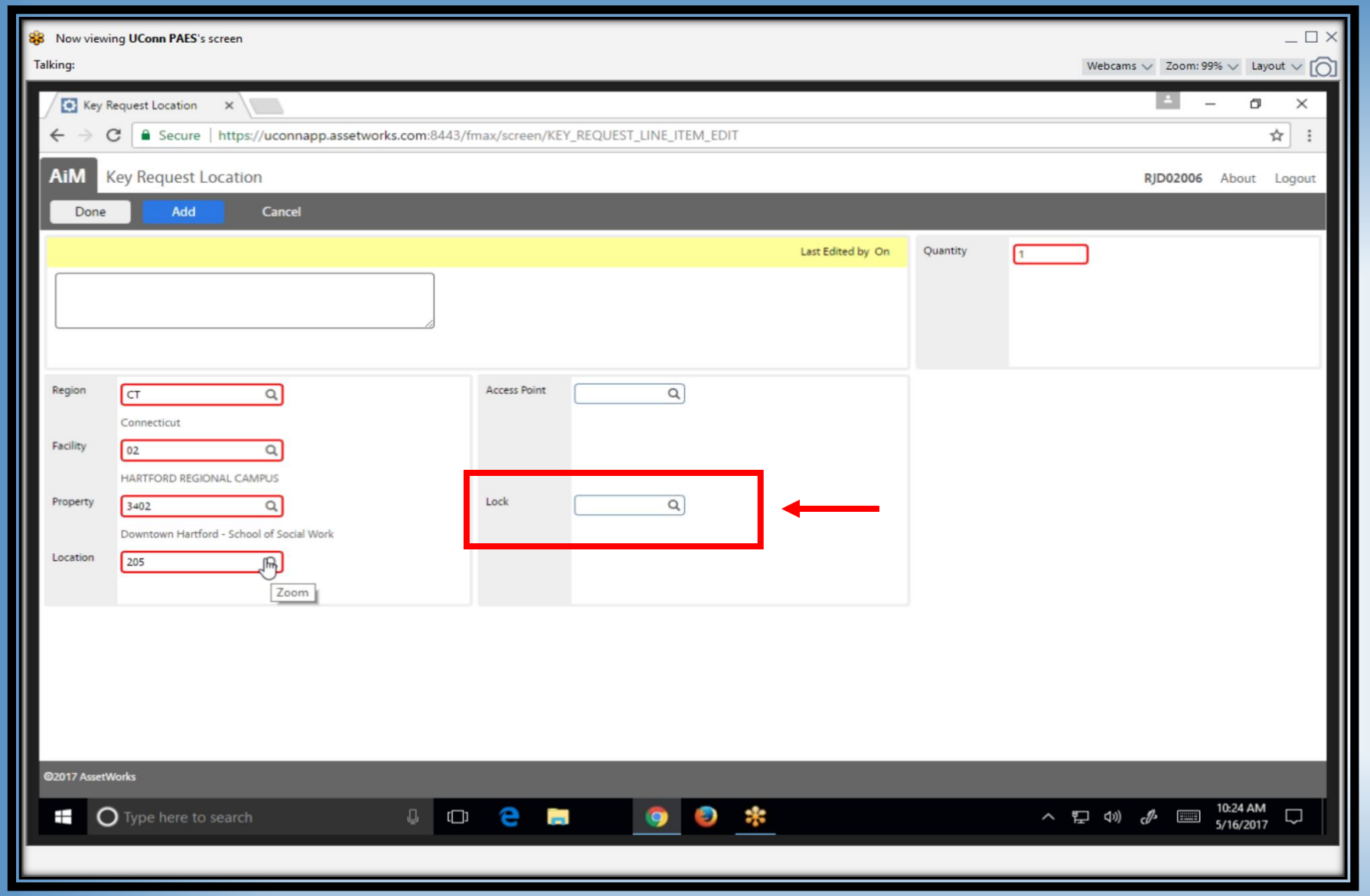
Search Access Point

New Key or Card Access Request – Create a Key Request



Select Access Point ID

New Key or Card Access Request – Create a Key Request

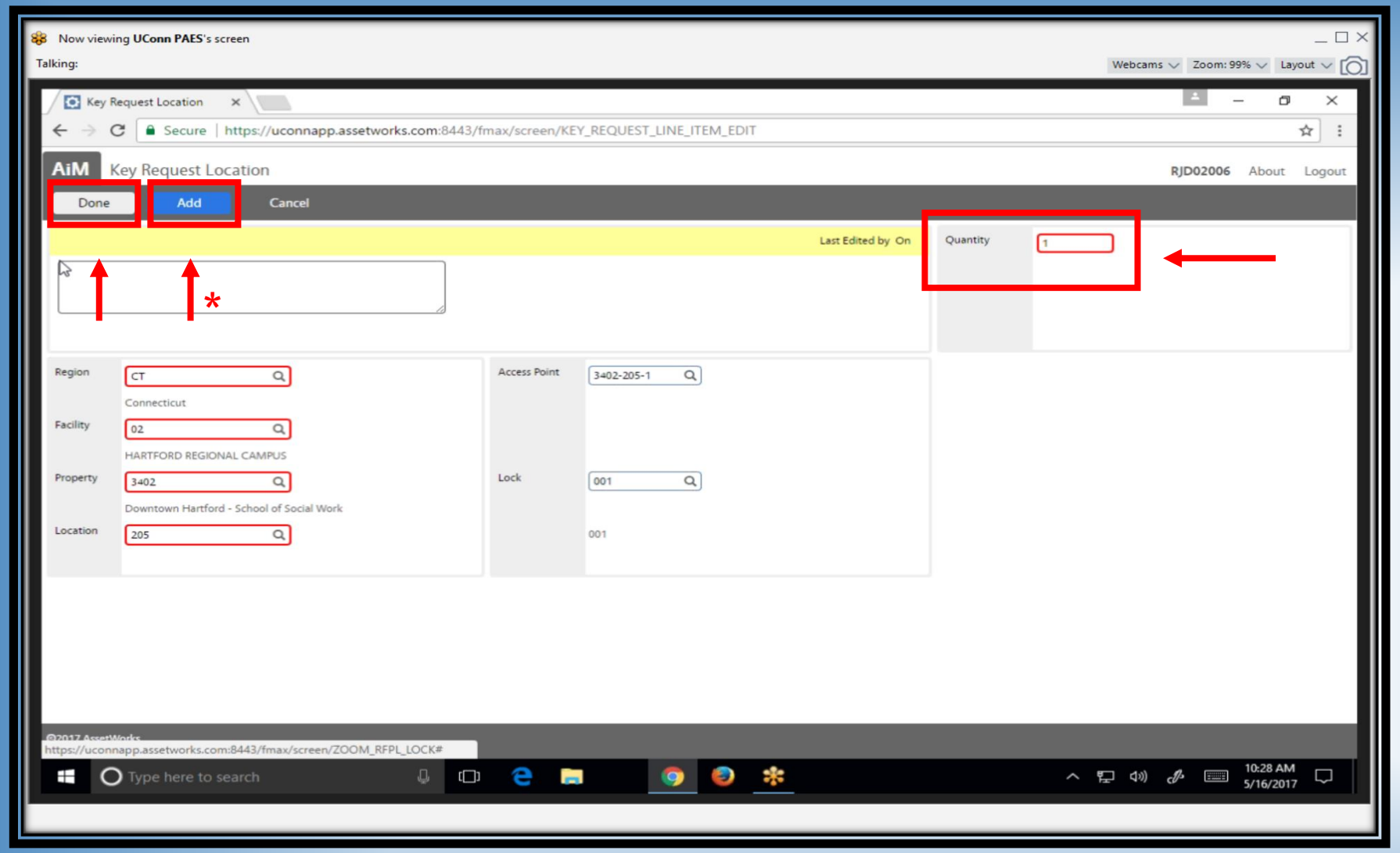


Search Lock field

New Key or Card Access Request – Create a Key Request

Select Lock ID

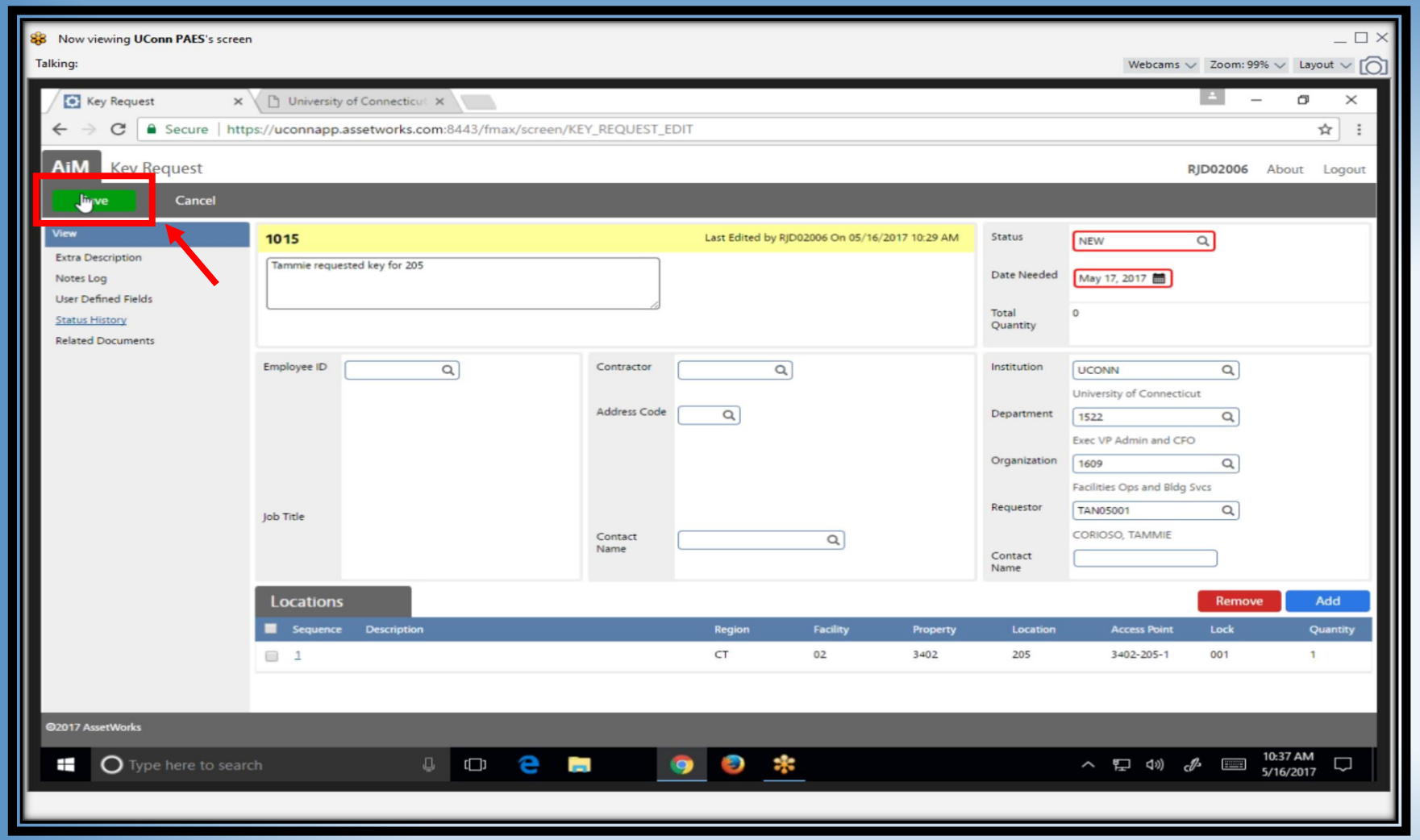
New Key or Card Access Request – Create a Key Request



* Click ***Add*** to add more locations as needed.

Enter Quantity, then click ***Done***.

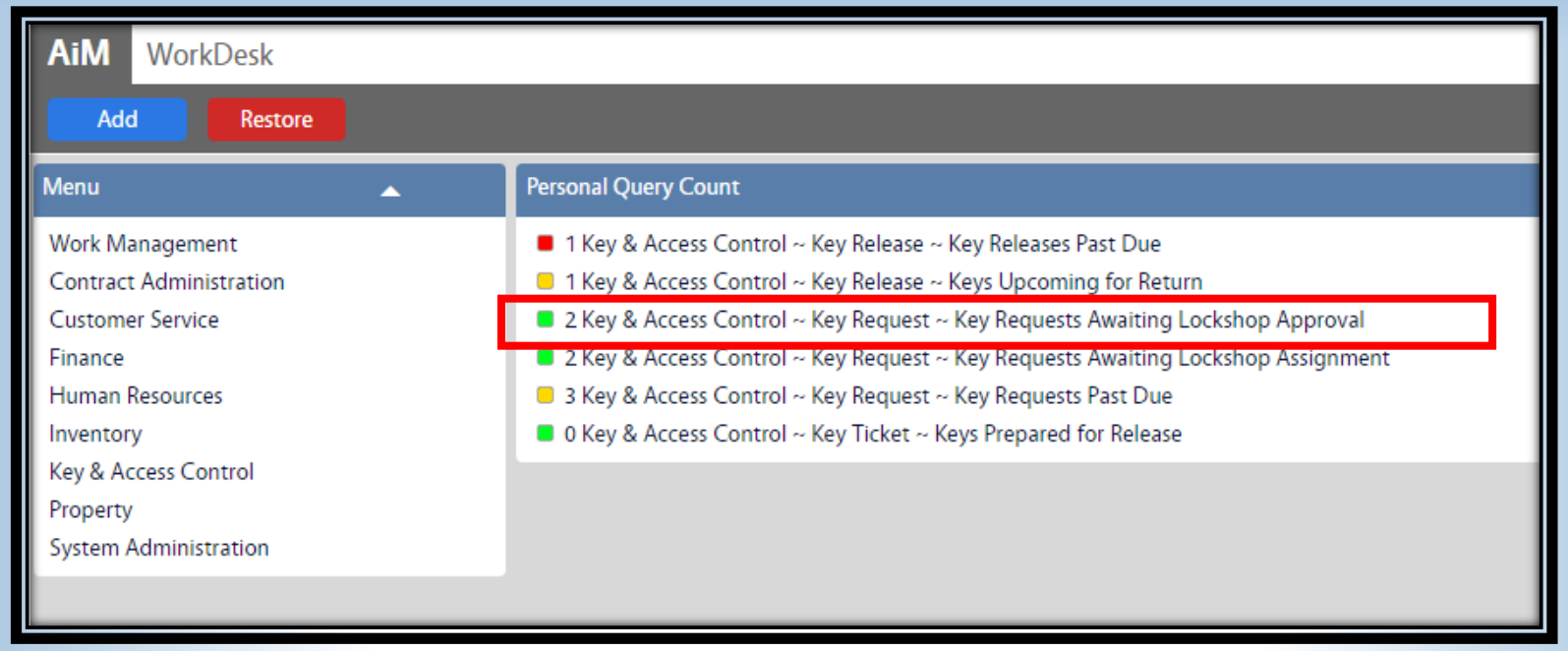
New Key or Card Access Request – Create a Key Request



Click ***Save***.

New Key or Card Access Request – Create a Key Request

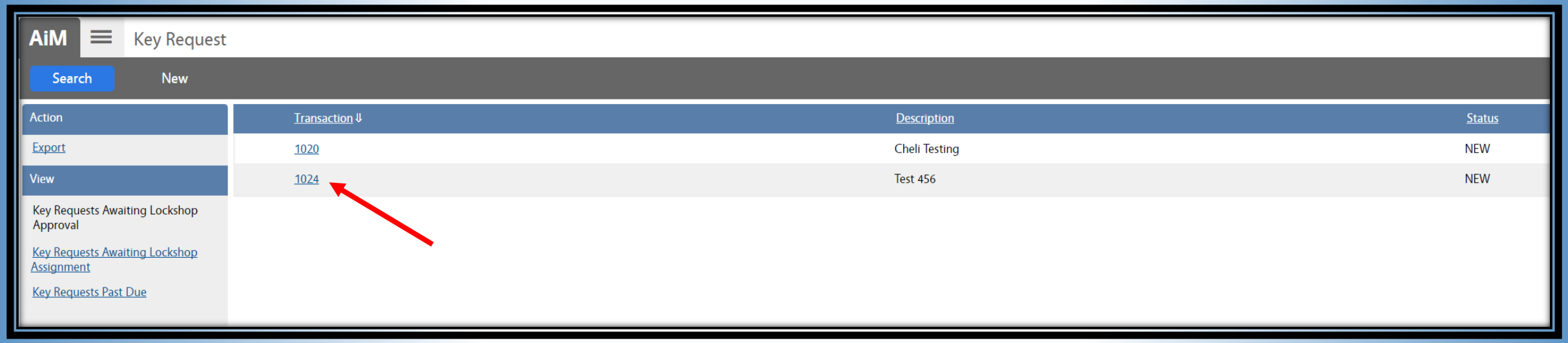
Step 2: Approve Key Request



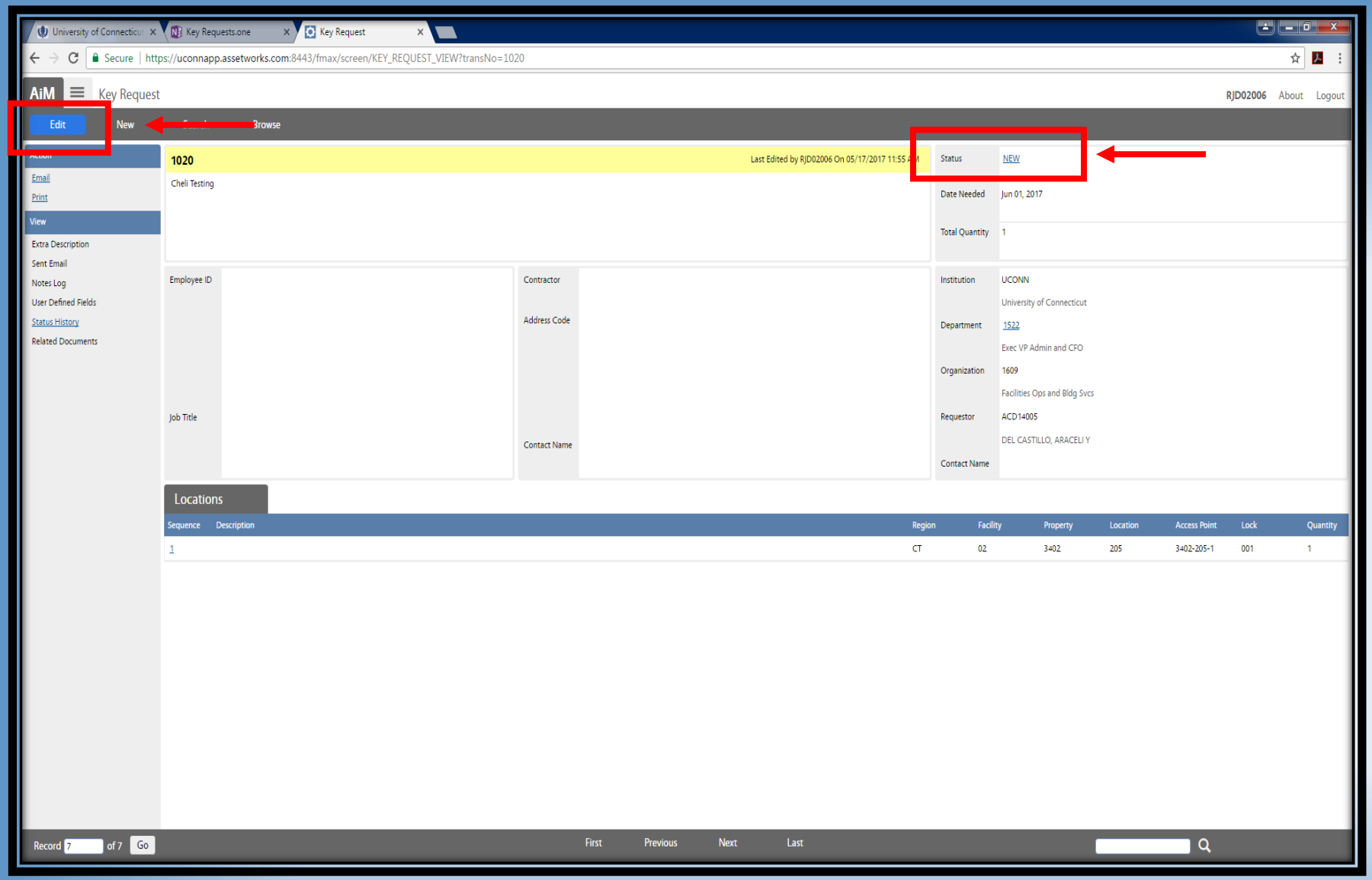
On WorkDesk under your Personal Query Count, click “Key Requests Awaiting Lockshop Approval”

New Key or Card Access Request – Approve Key Request

Select Key Request ID

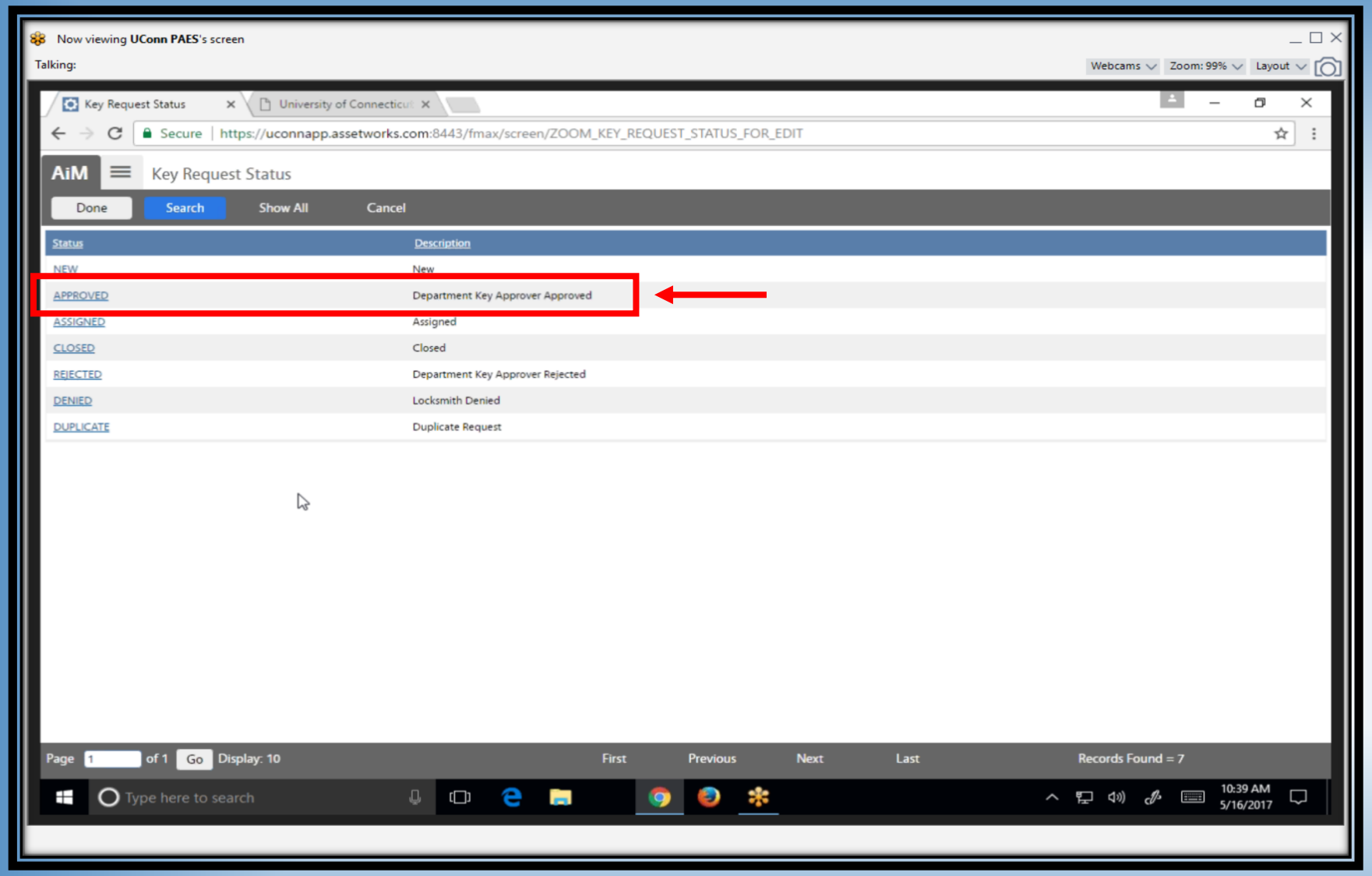


New Key or Card Access Request – Approve Key Request



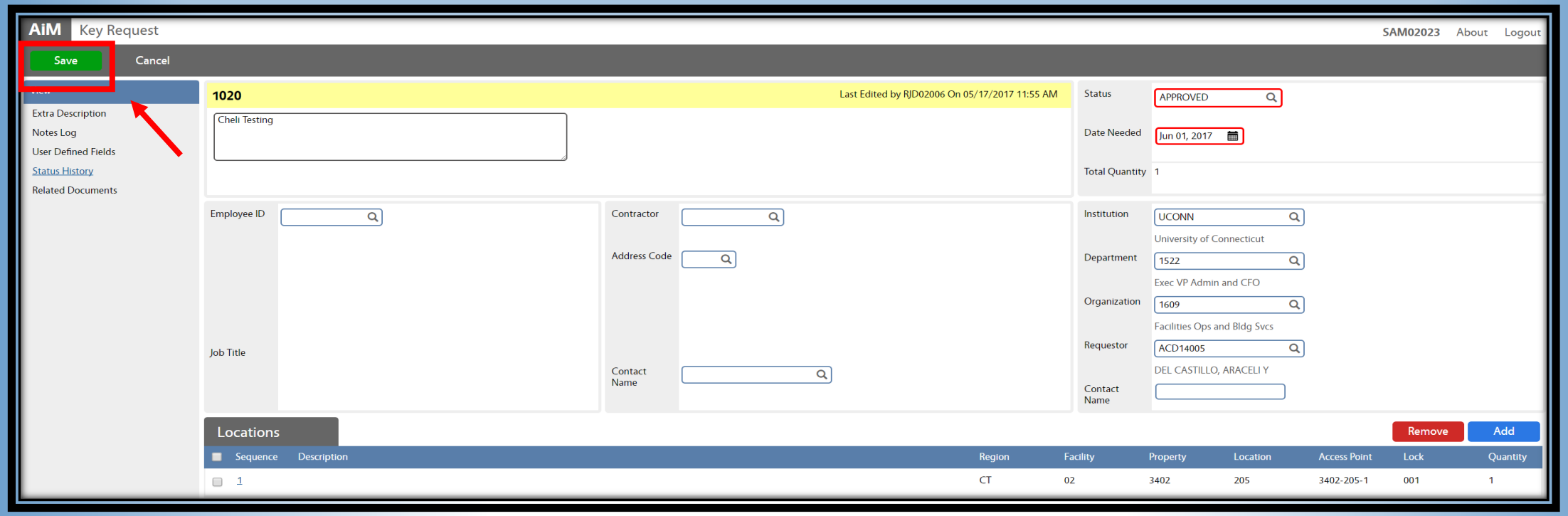
Click ***Edit***, then click on Status

New Key or Card Access Request – Approve Key Request



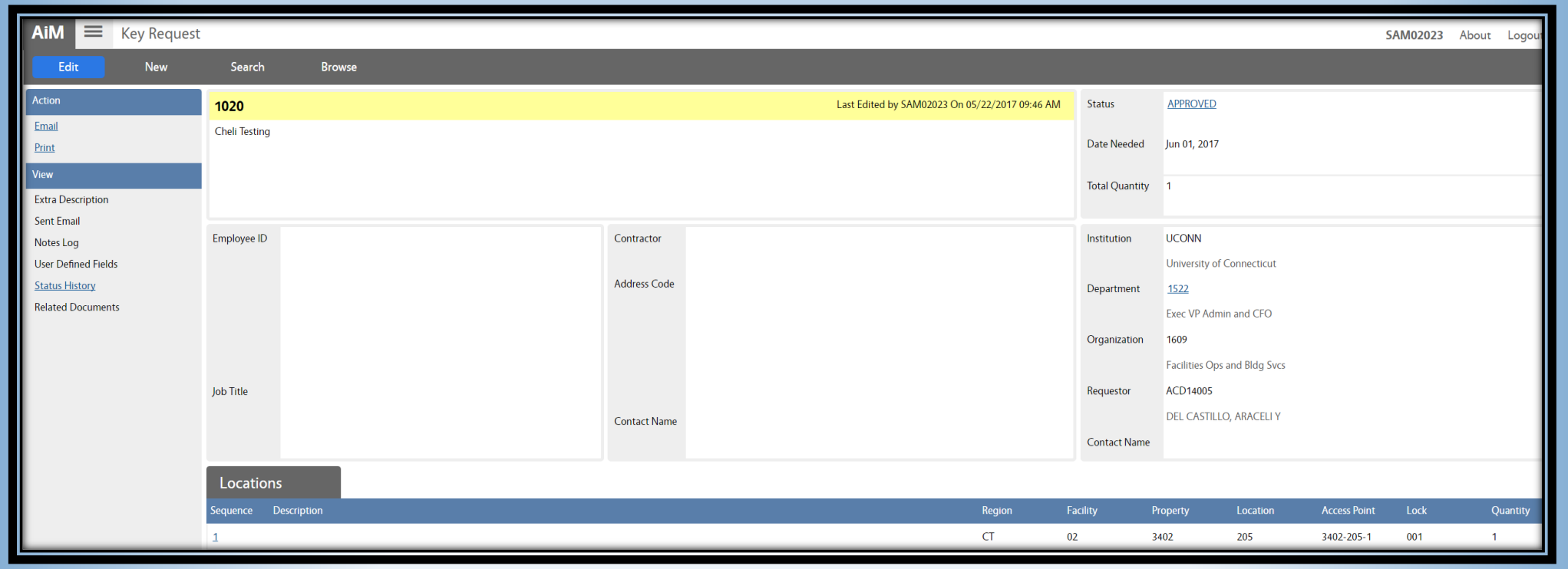
Update Status to *"Approved"*

New Key or Card Access Request – Approve Key Request



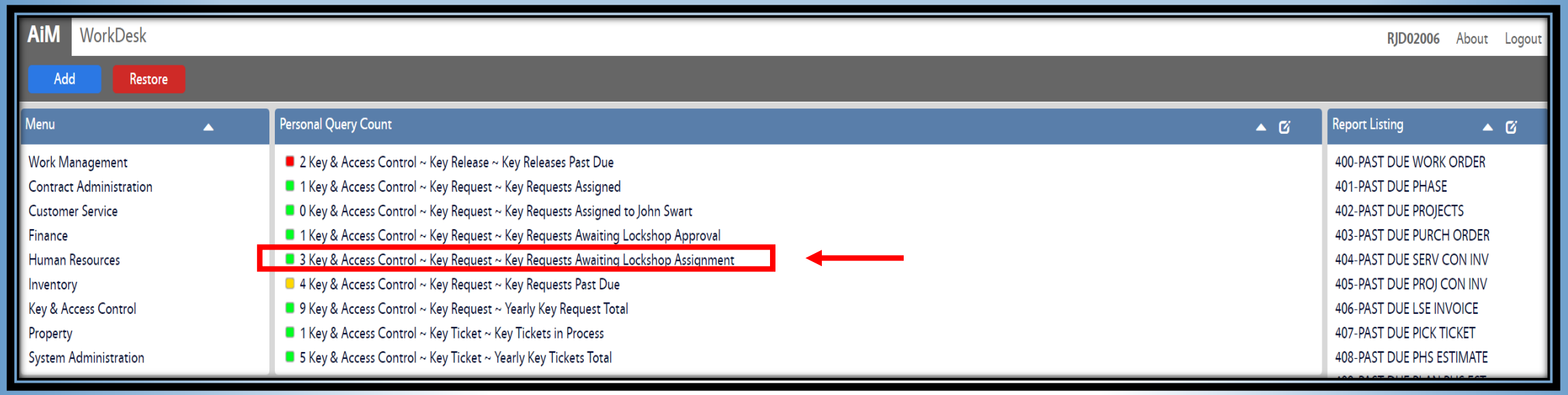
Click ***Save***

New Key or Card Access Request – Approve Key Request



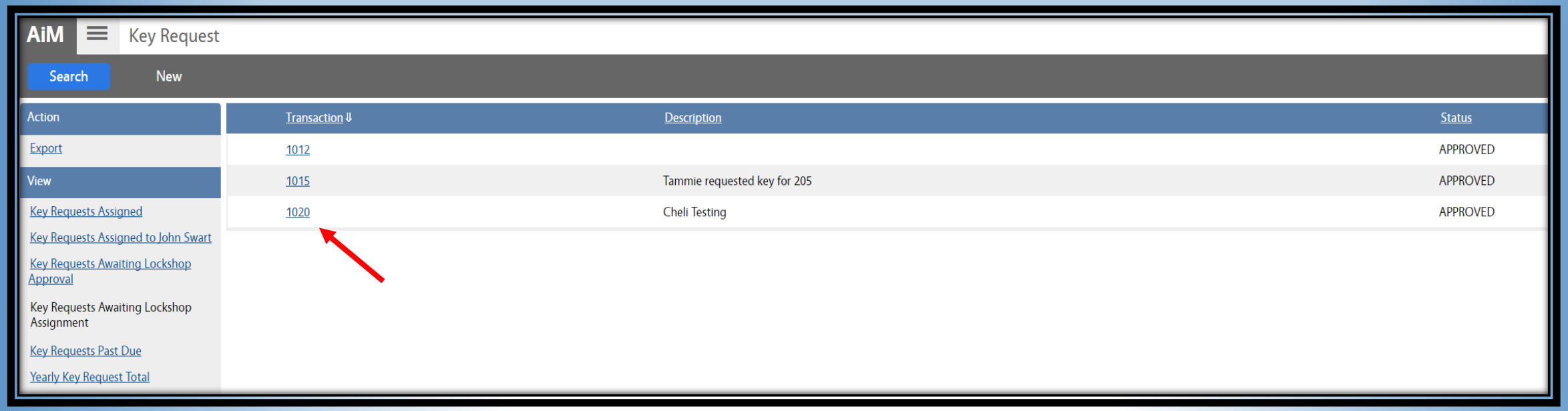
New Key or Card Access Request – Approve Key Request

Step 3: Assign Key Request



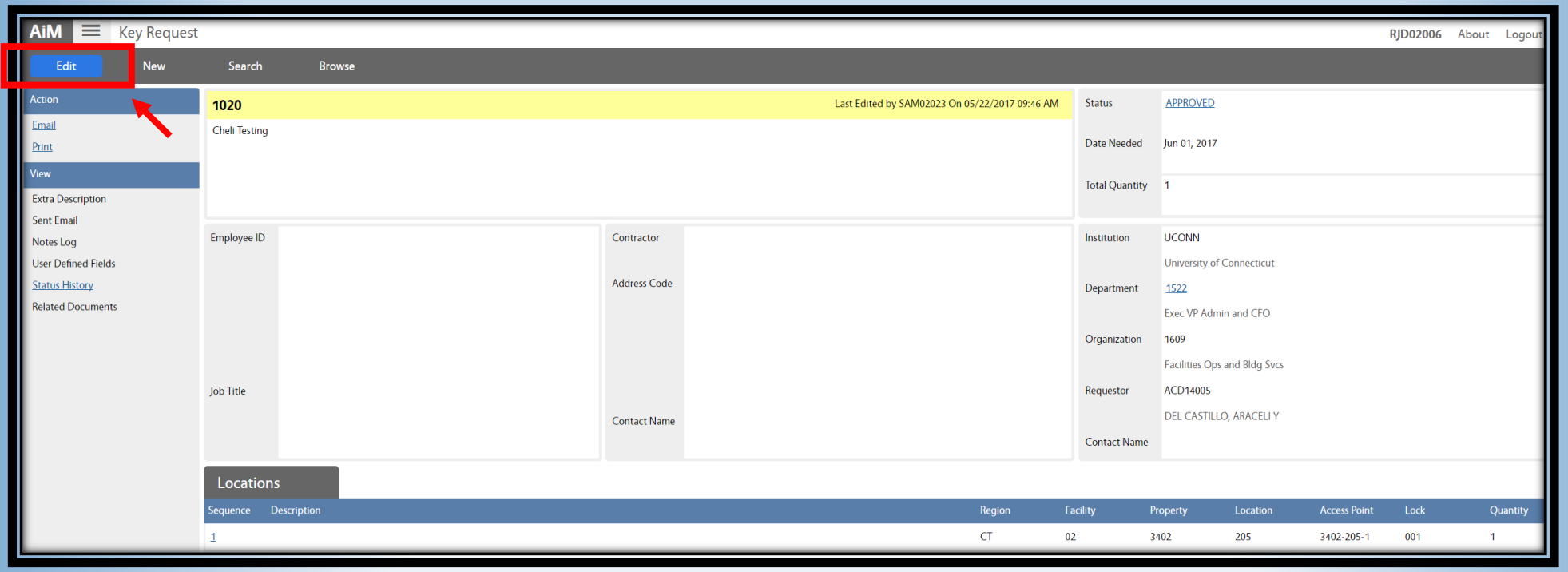
On WorkDesk, under your Personal Query Count, click “Key Requests Lockshop Assignment”

New Key or Card Access Request – Assign Key Request



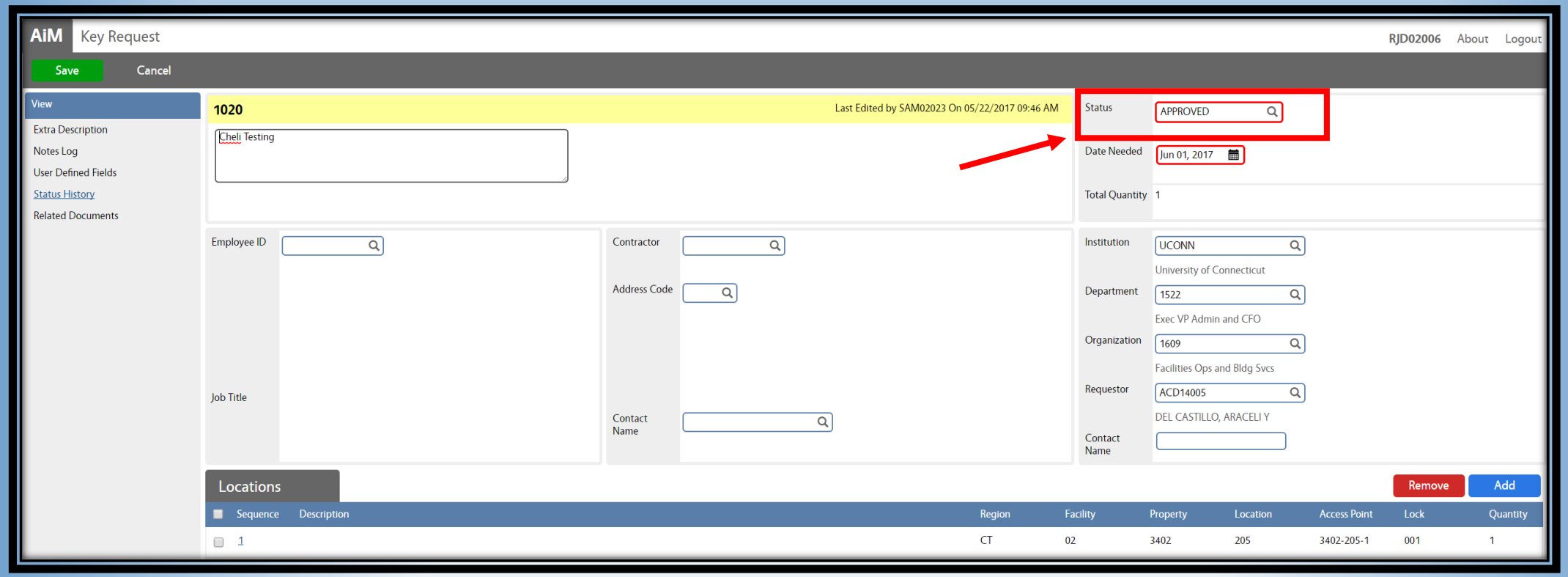
Select Key Request ID

New Key or Card Access Request – Assign Key Request



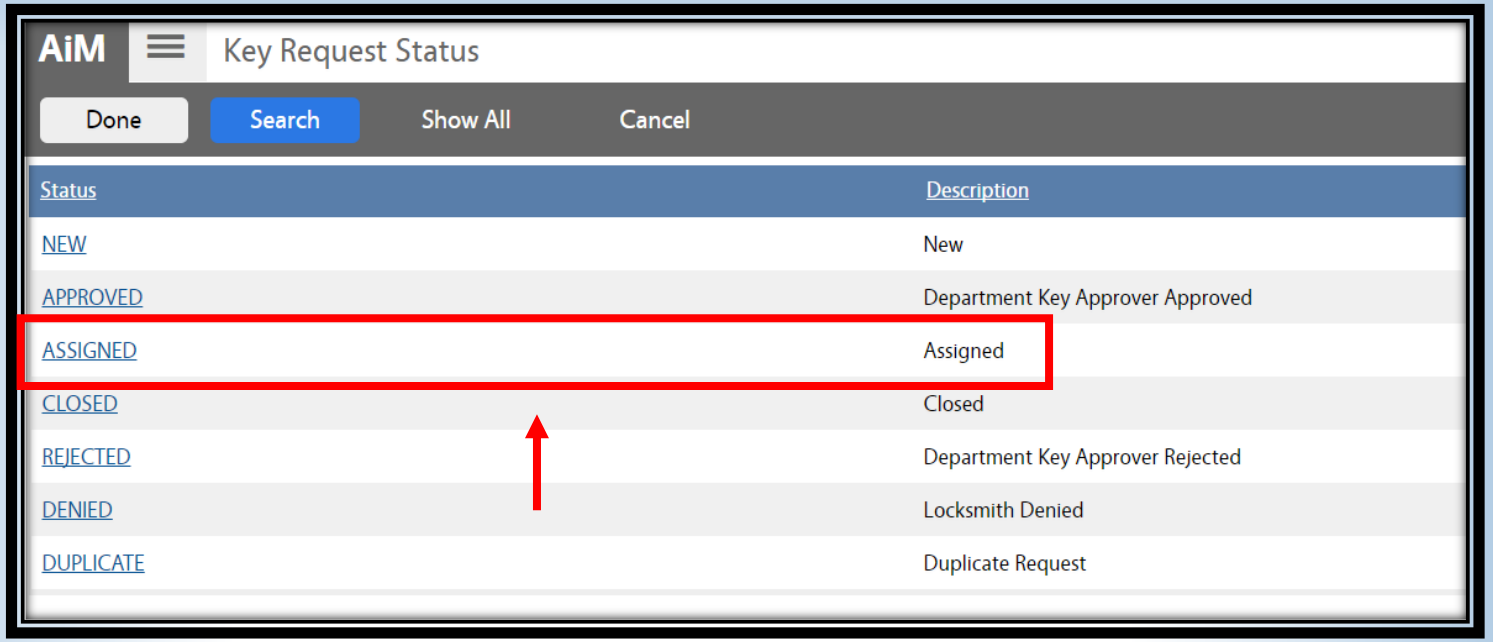
Click ***Edit***

New Key or Card Access Request – Assign Key Request



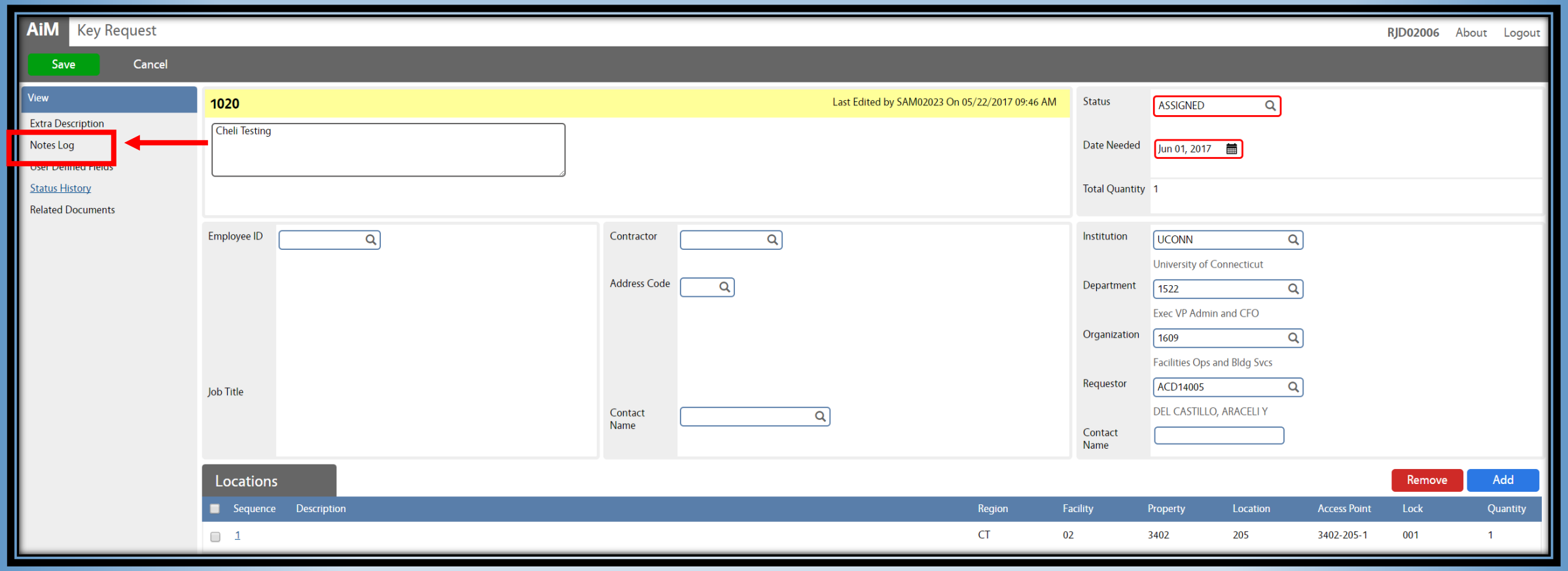
Click status to update it

New Key or Card Access Request – Assign Key Request



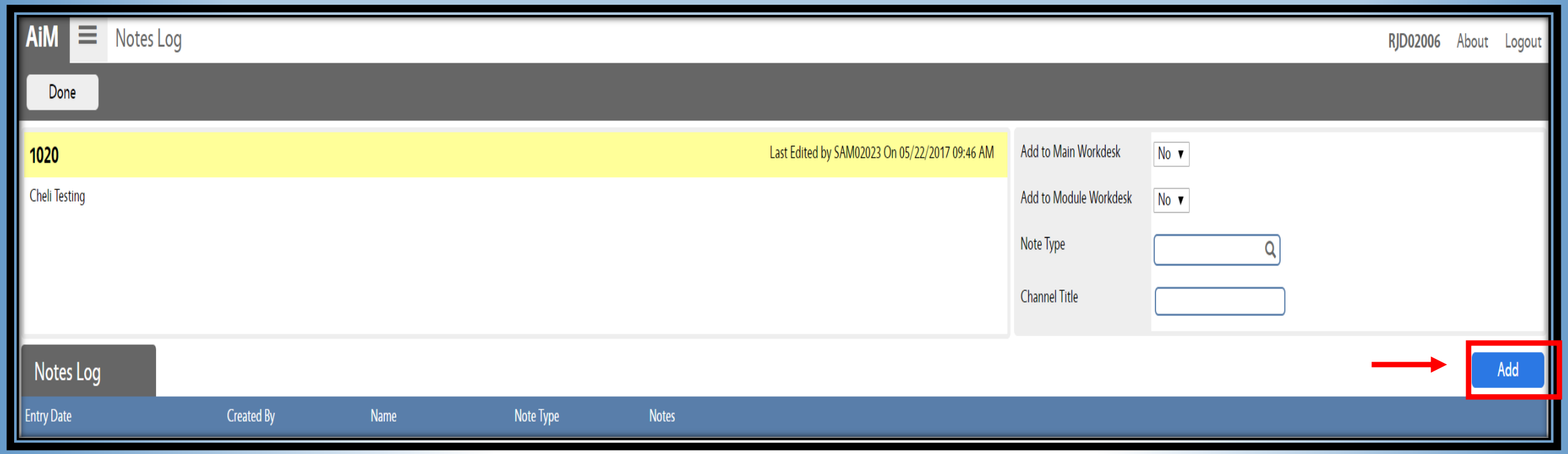
Click “Assigned”

New Key or Card Access Request – Assign Key Request



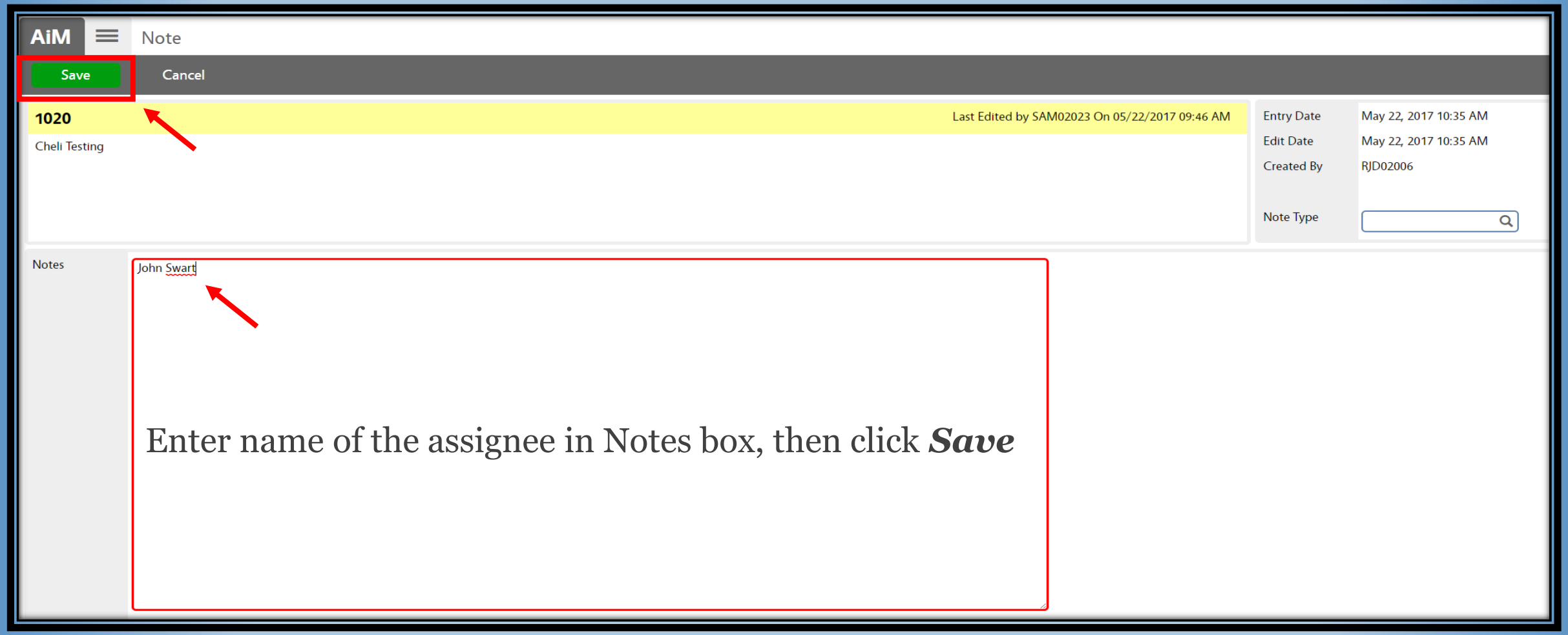
Click *Notes Log* link

New Key or Card Access Request – Assign Key Request

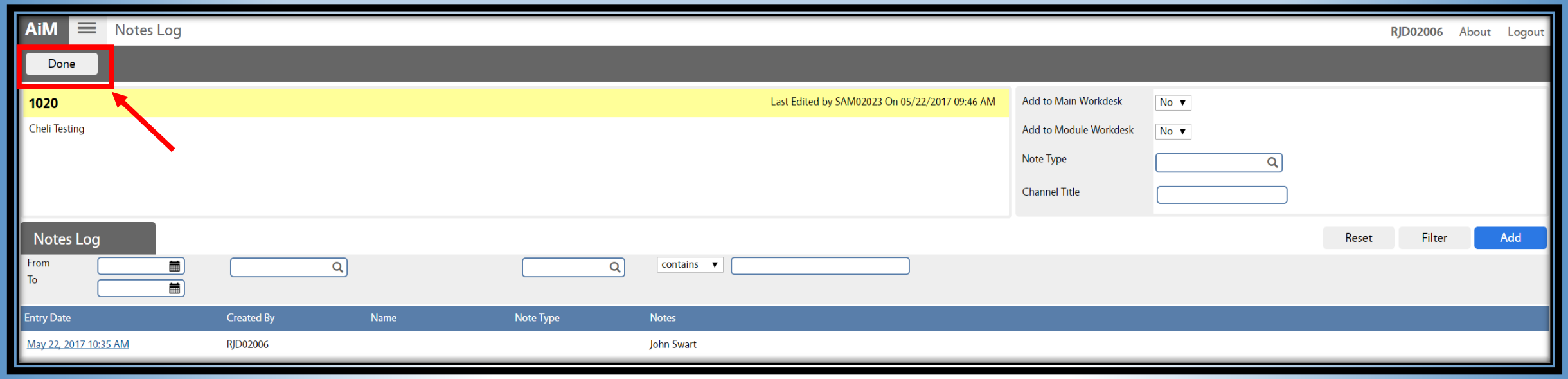


Click ***Add***

New Key or Card Access Request – Assign Key Request

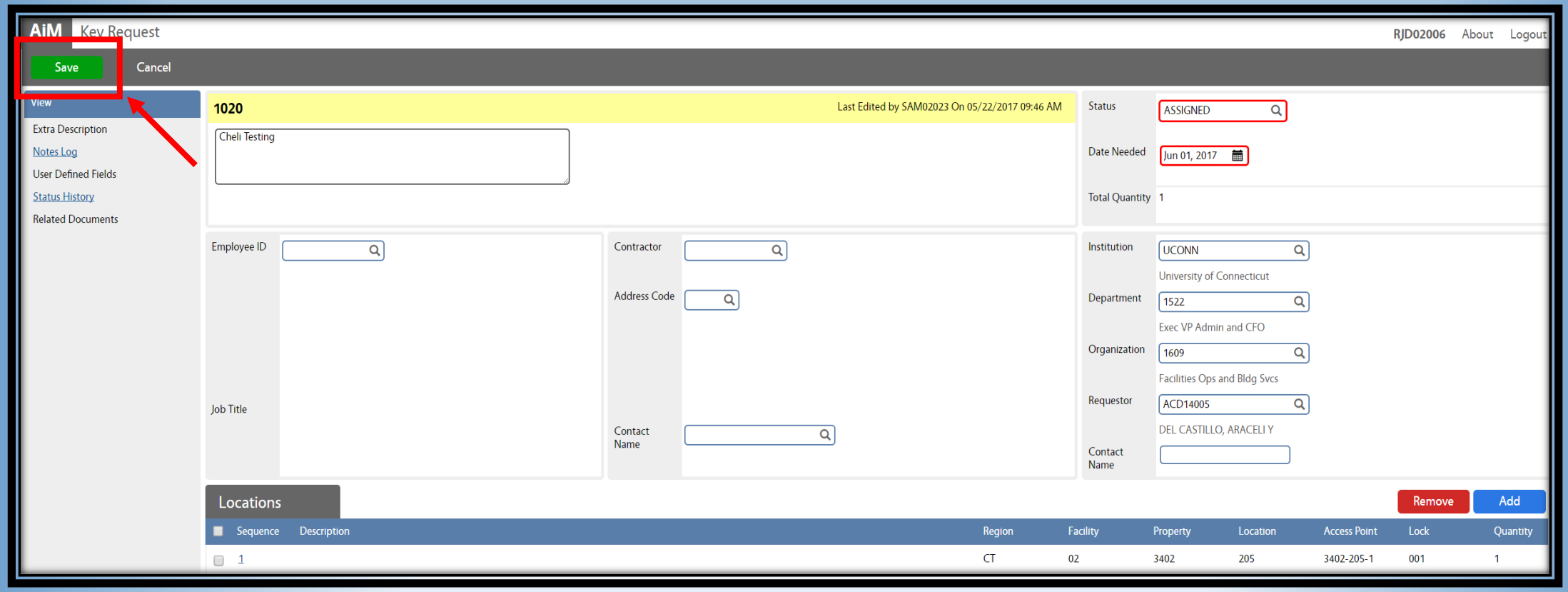


New Key or Card Access Request – Assign Key Request



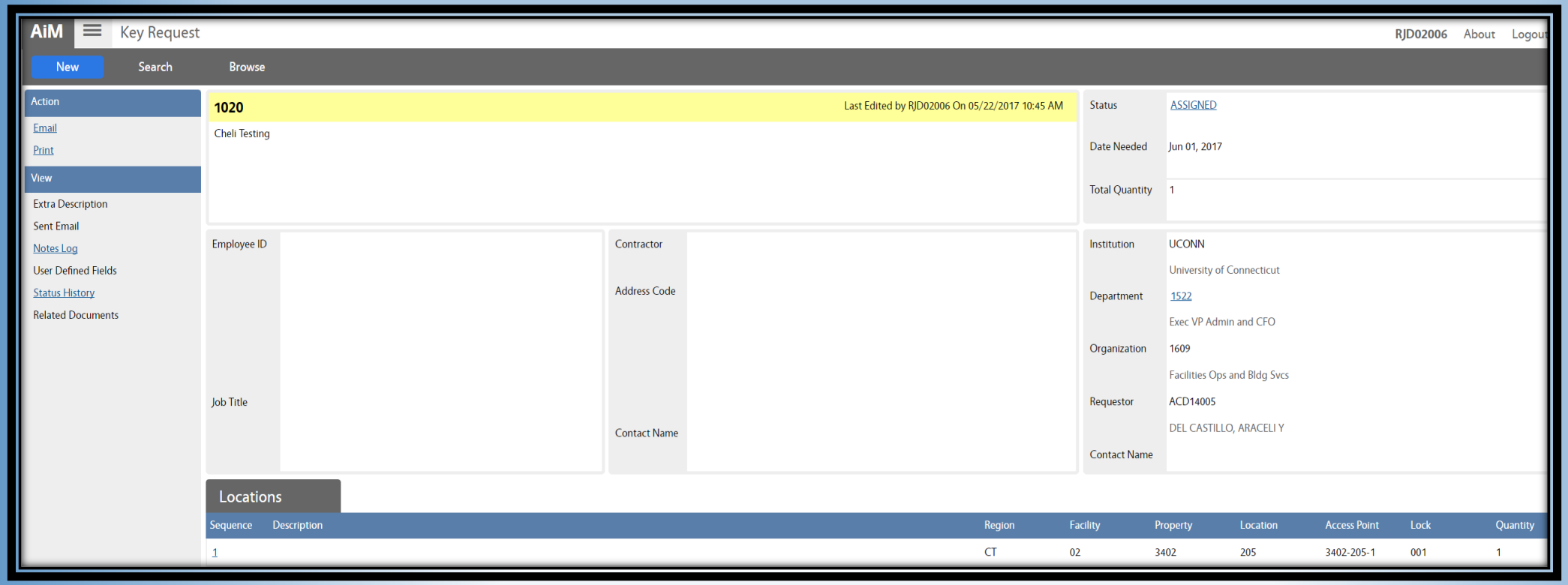
Click ***Done***

New Key or Card Access Request – Assign Key Request



Click ***Save***

New Key or Card Access Request – Assign Key Request

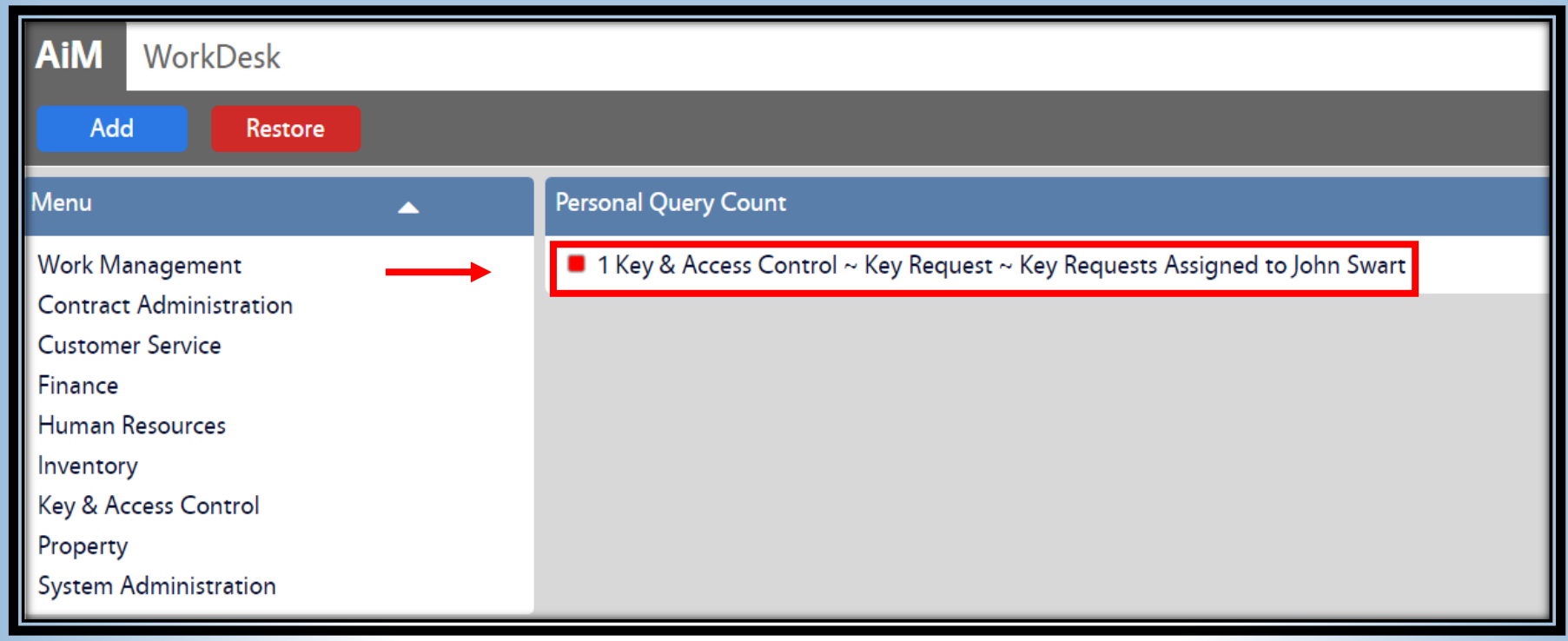


New Key or Card Access Request – Assign Key Request

New Key or Card Access Request

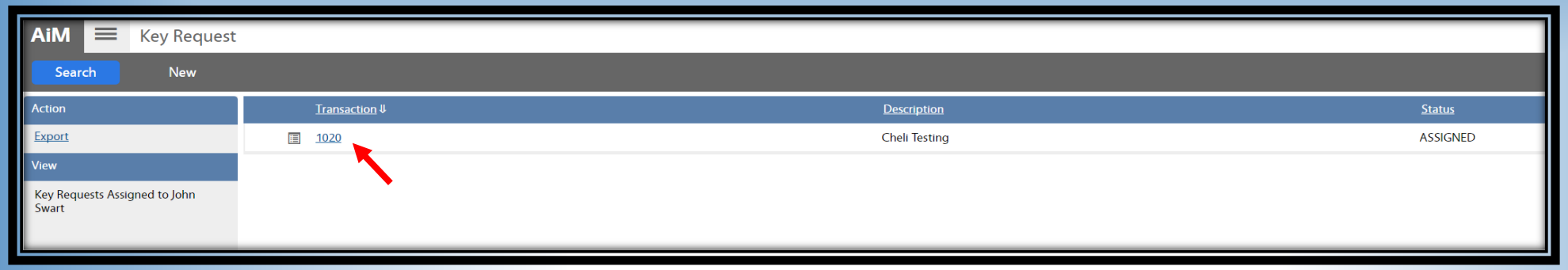
Key Ticket

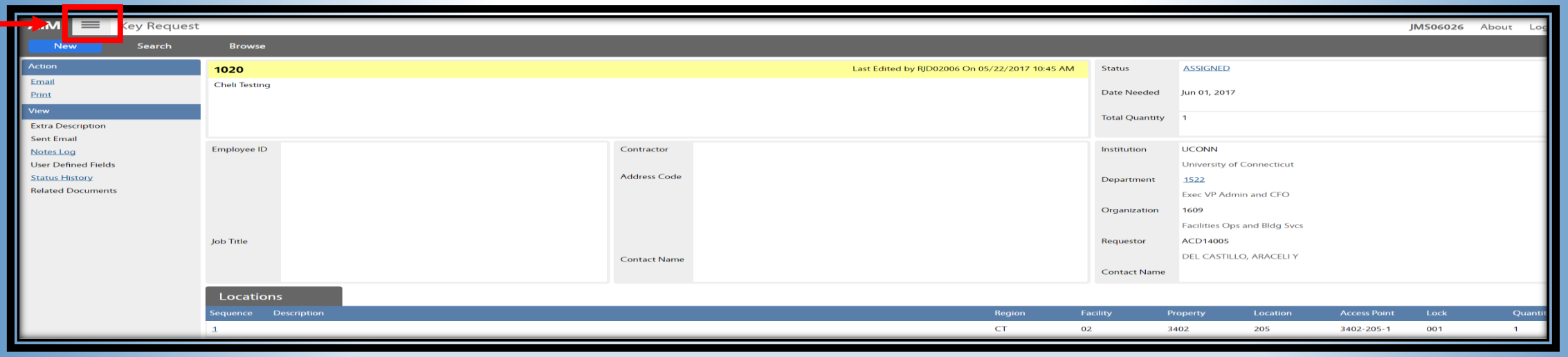
Step 1: Create a Key Ticket



On WorkDesk, under your Personal Query Count, click “Key Requests Assigned to (your name)”

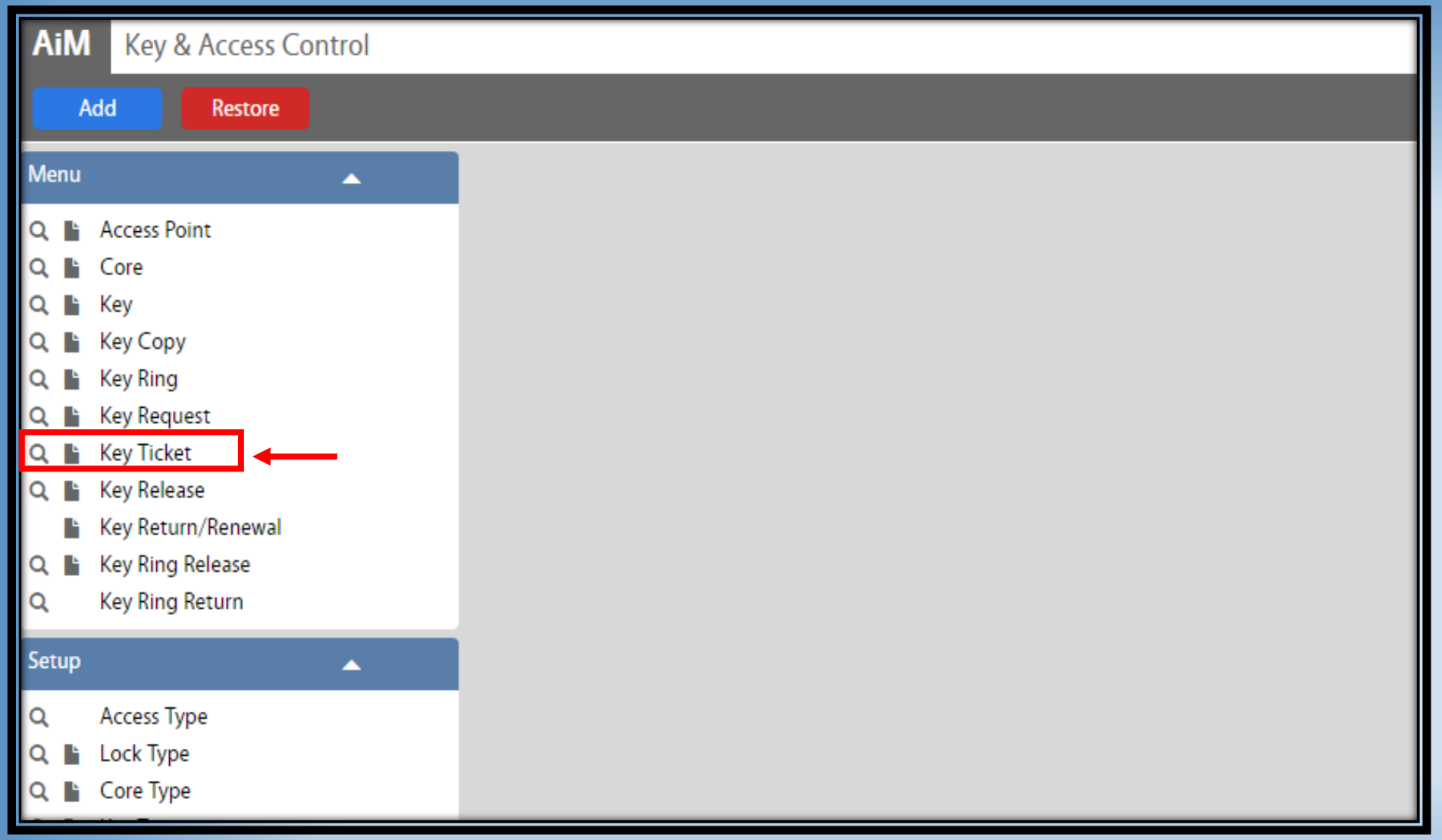
New Key or Card Access Request – Create Key Ticket





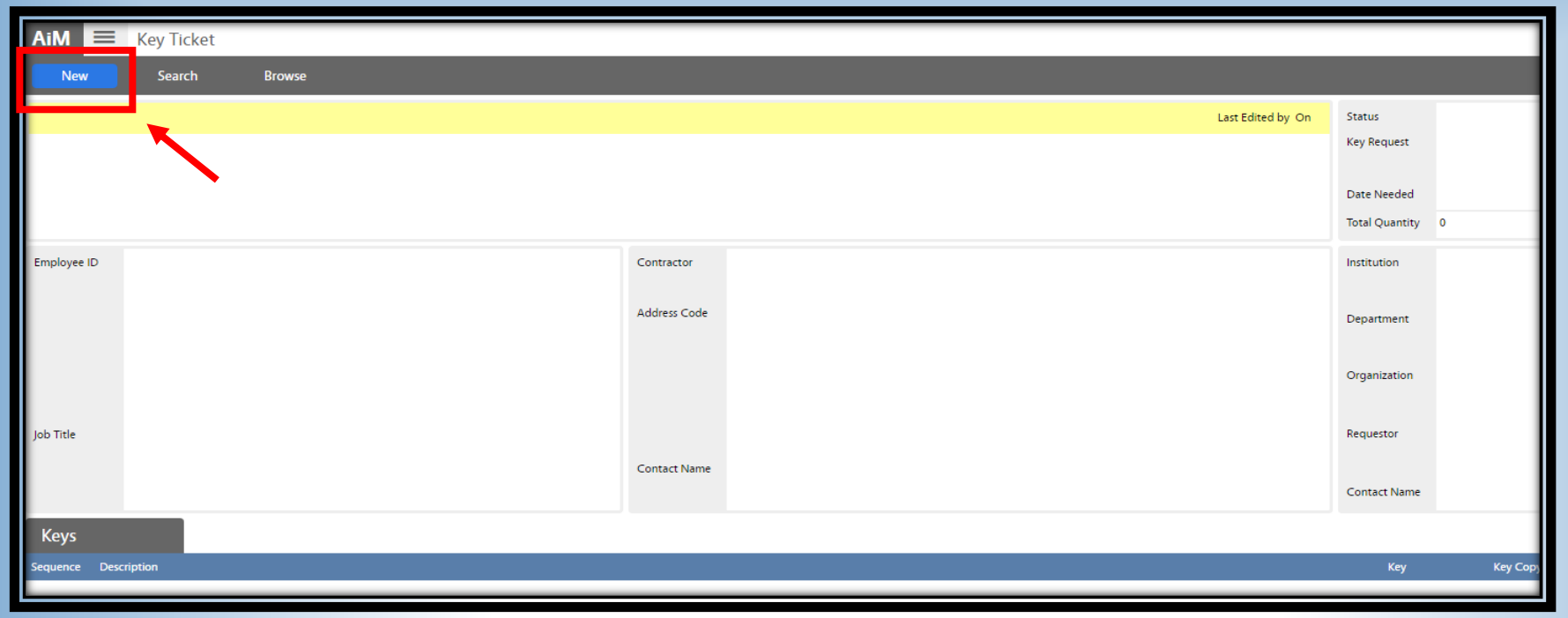
Select Key Request ID, take note of the number, then click on the hamburger menu

New Key or Card Access Request – Create Key Ticket



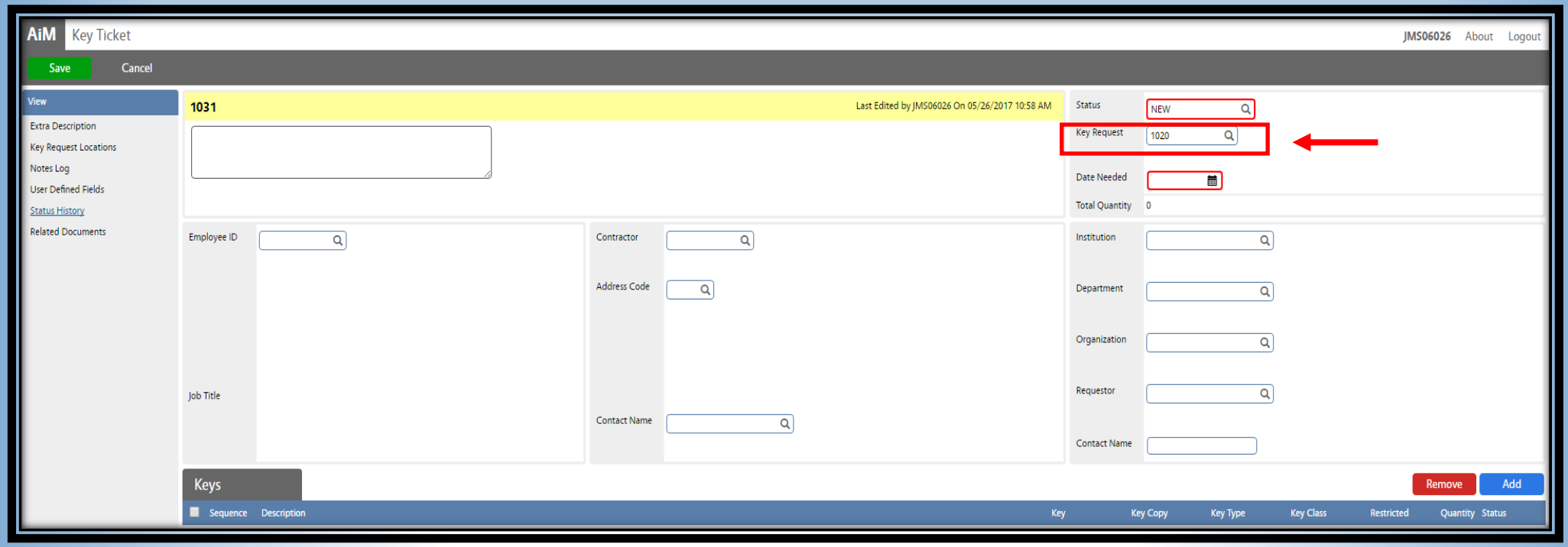
On WorkDesk click Key Ticket

New Key or Card Access Request – Create Key Ticket



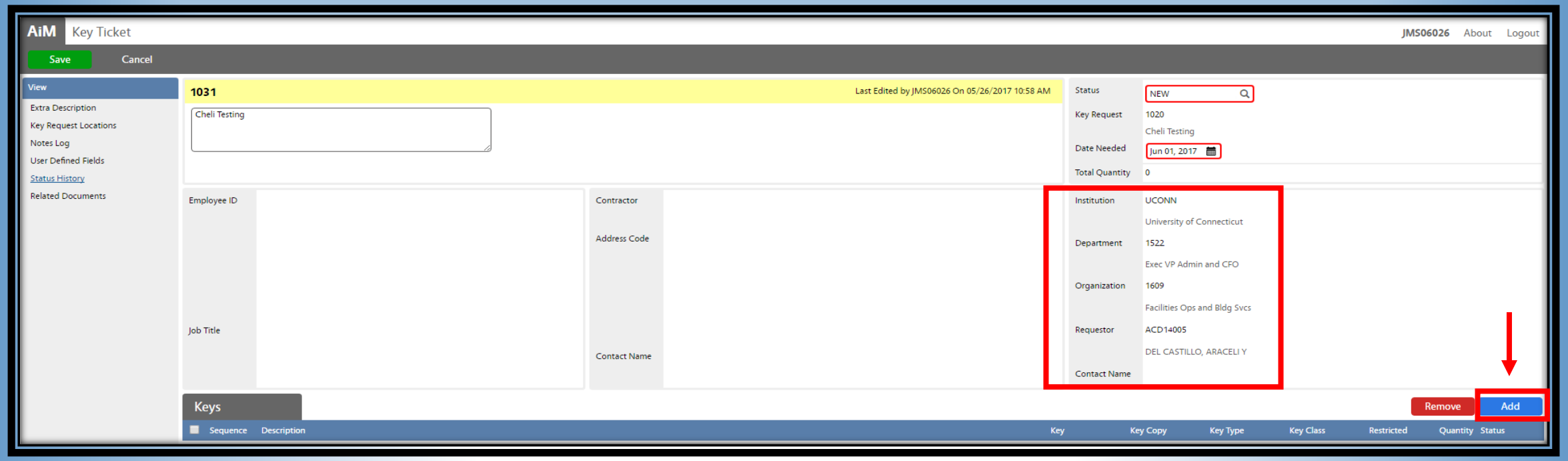
Click ***New***

New Key or Card Access Request – Create Key Ticket



Enter/search Key Request number

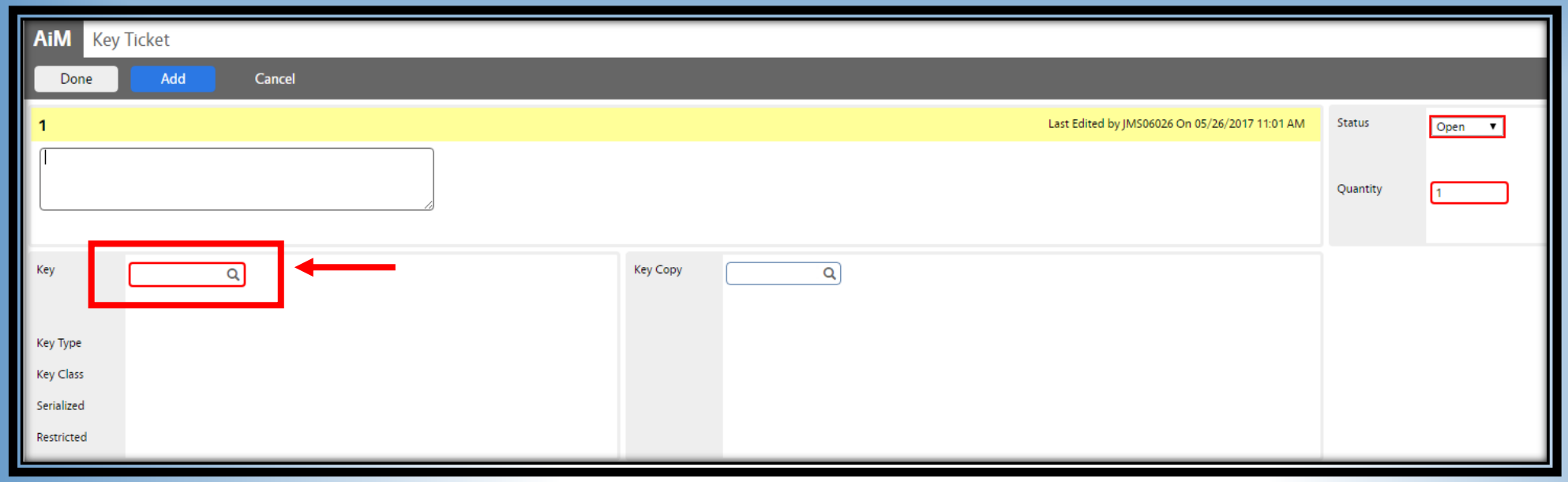
New Key or Card Access Request – Create Key Ticket

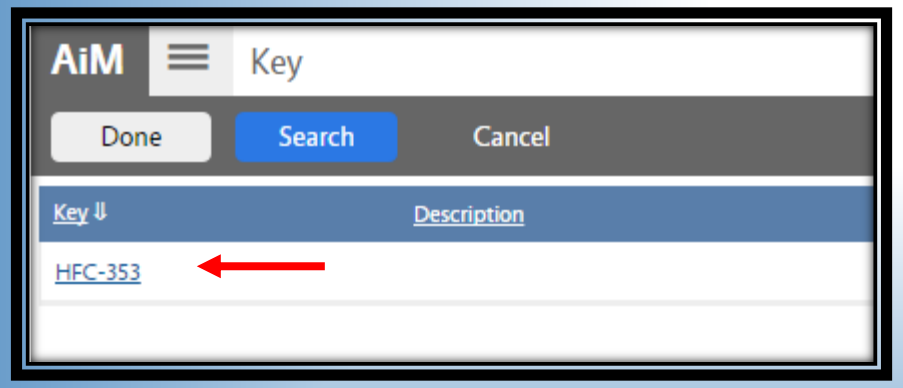


Note: Location information is automatically populated

Click ***Add***

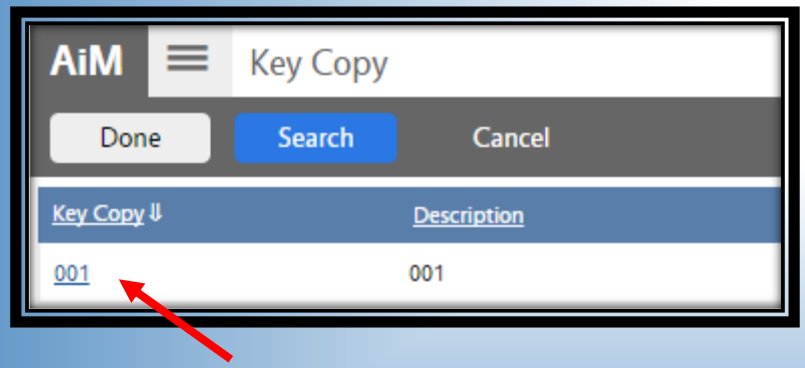
New Key or Card Access Request – Create Key Ticket





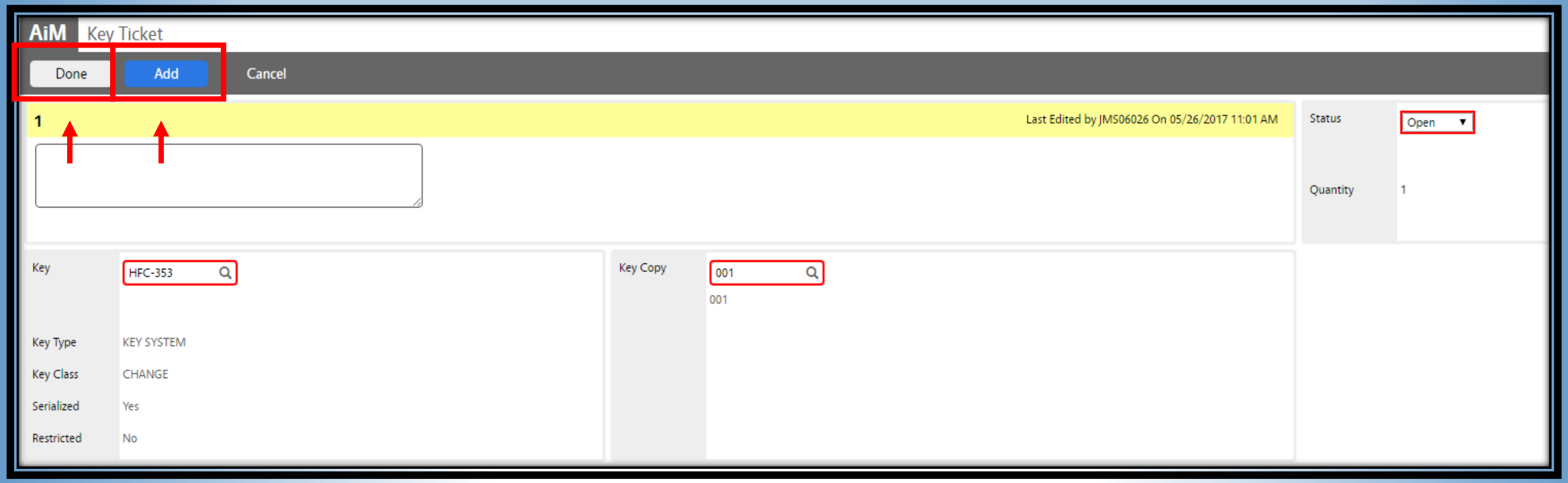
Search/Select Key

New Key or Card Access Request – Create Key Ticket



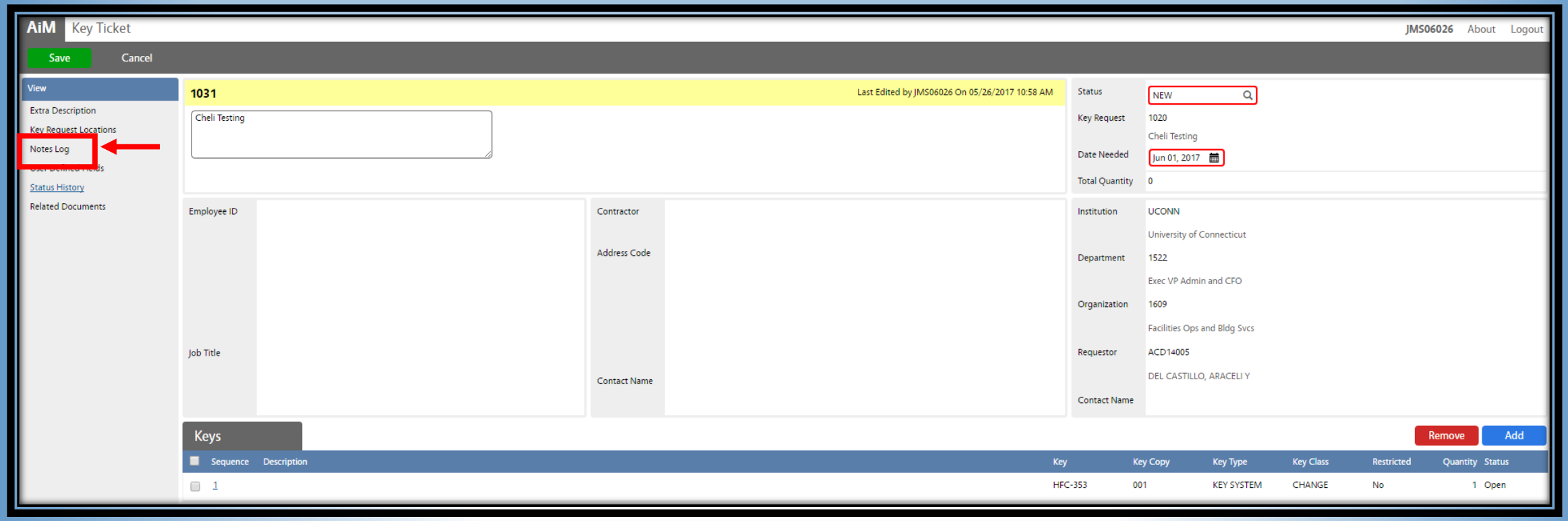
Search/Select Key Copy

New Key or Card Access Request – Create Key Ticket



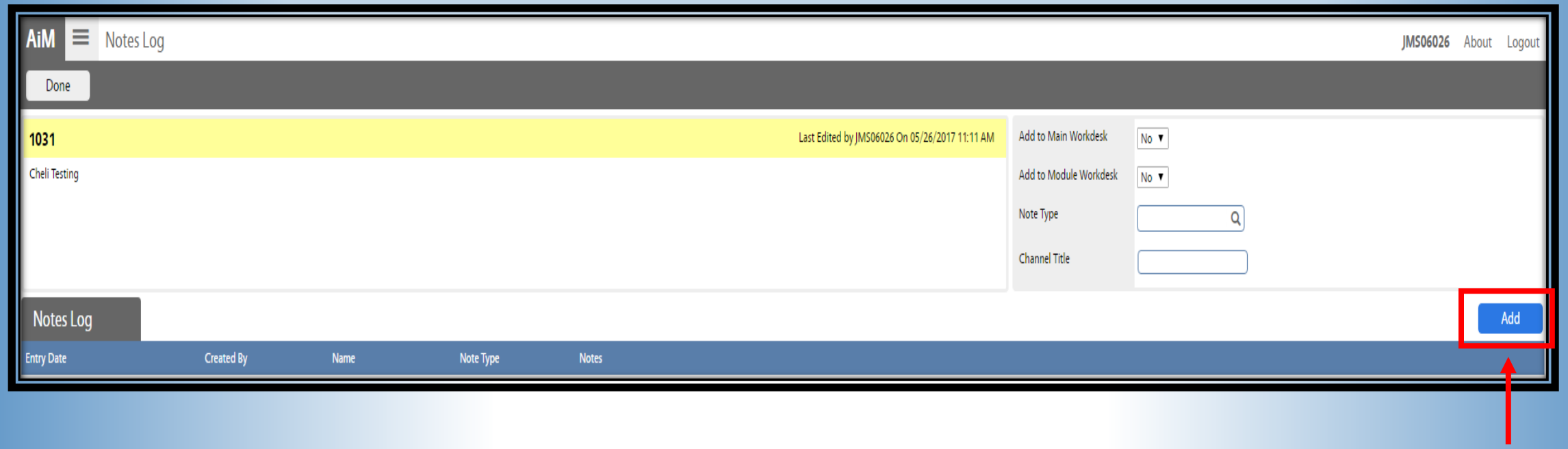
Click ***Add*** to add more keys as needed, then click ***Done***

New Key or Card Access Request – Create Key Ticket



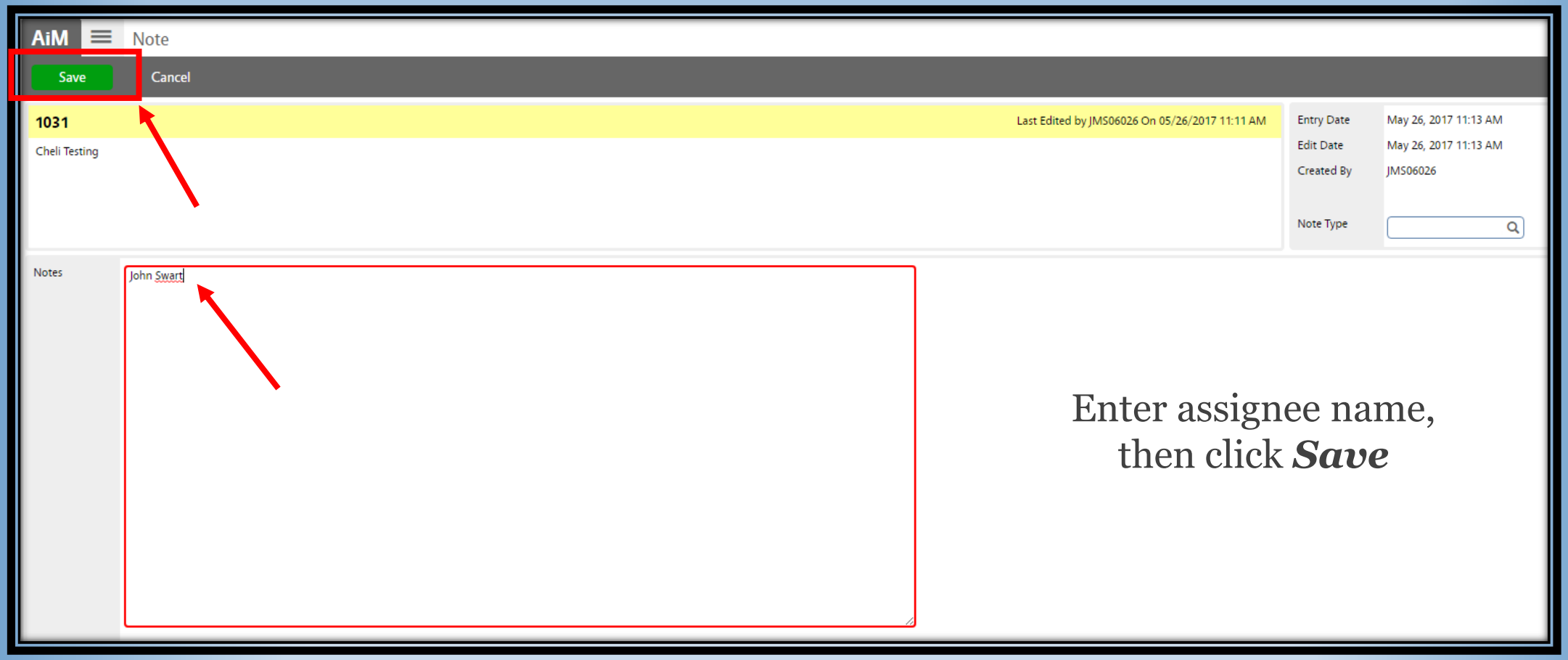
Click *Notes Log* link

New Key or Card Access Request – Create Key Ticket



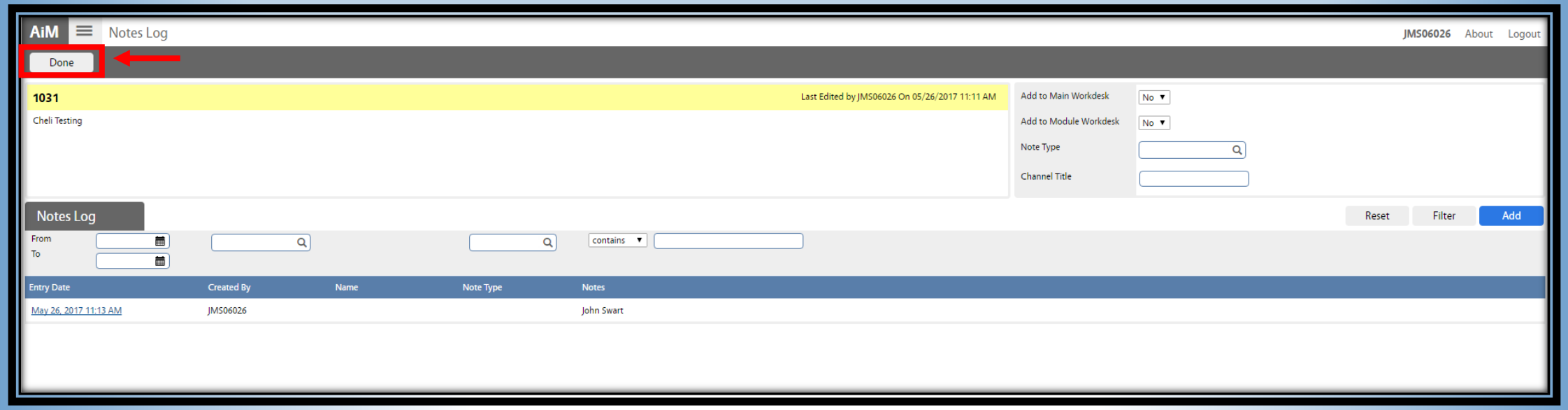
Click Add to enter assignee name

New Key or Card Access Request – Create Key Ticket



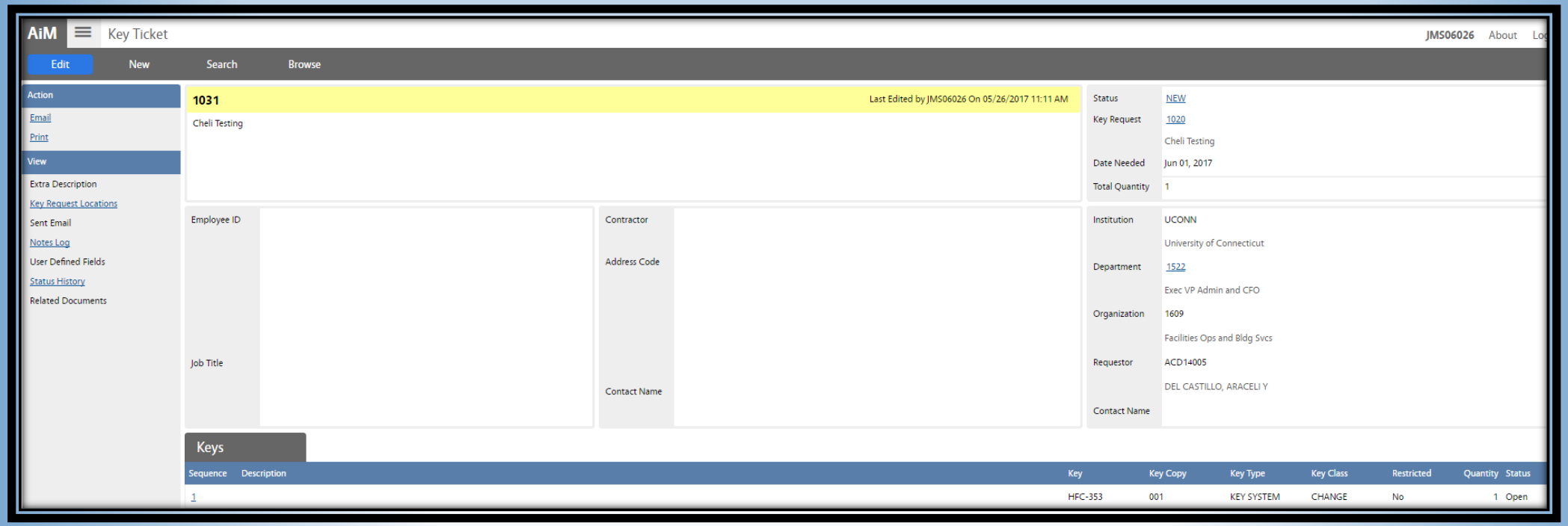
Enter assignee name, then click ***Save***

New Key or Card Access Request – Create Key Ticket



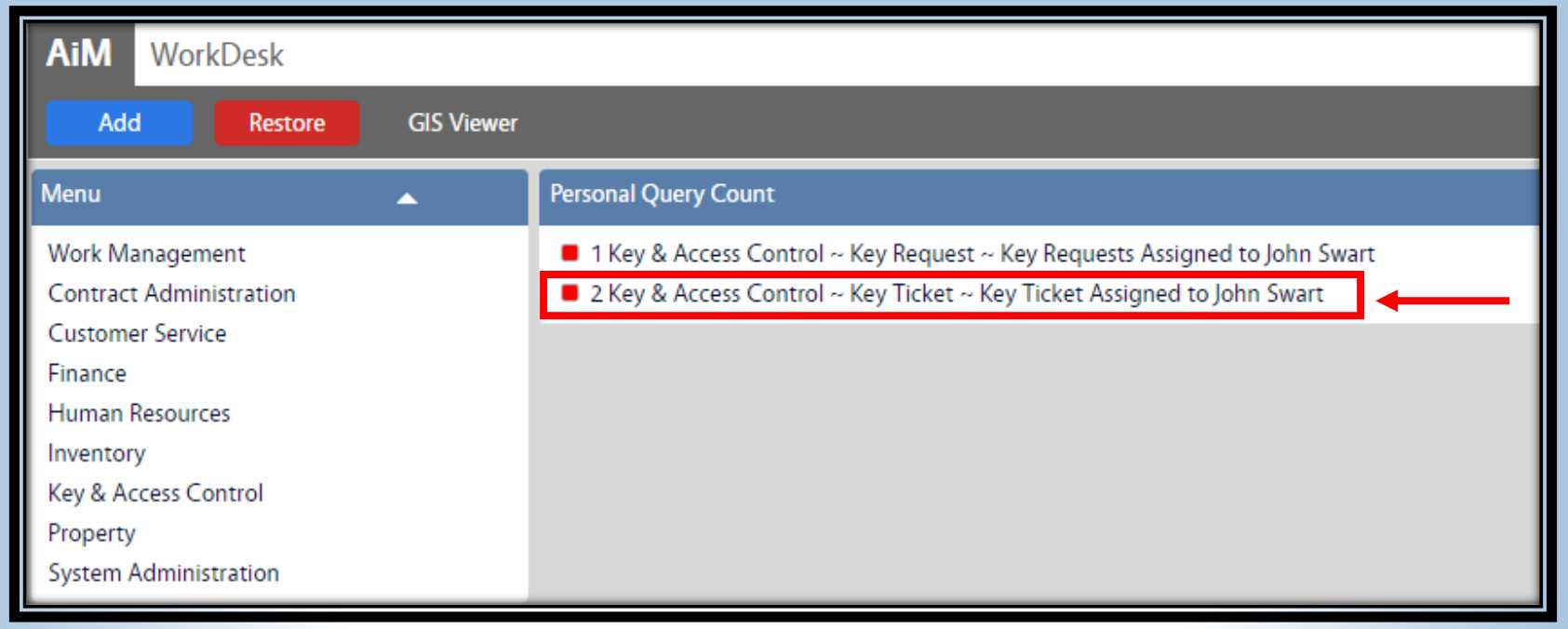
Click ***Done***

New Key or Card Access Request – Create Key Ticket



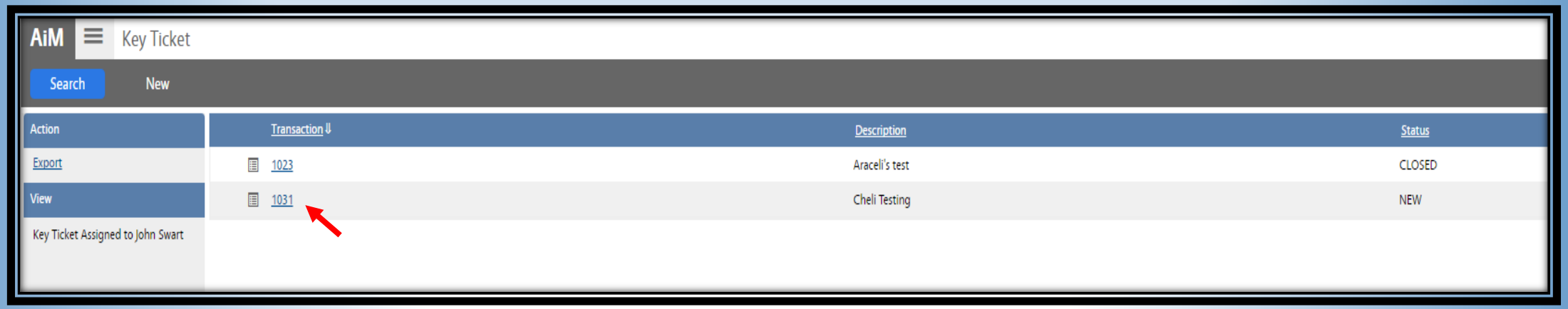
New Key or Card Access Request – Create Key Ticket

Step 2: Update Key Ticket Status



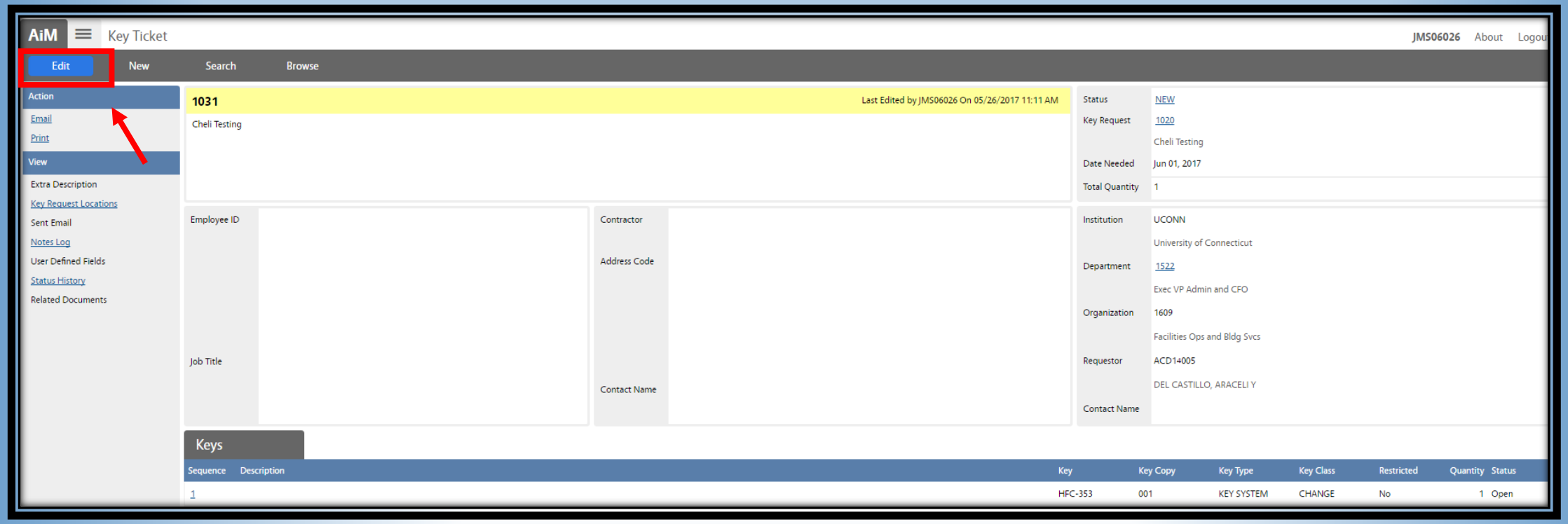
On WorkDesk, under your Personal Query Count, click “Key Ticket Assigned to (your name)”

New Key or Card Access Request – Update Key Ticket Status



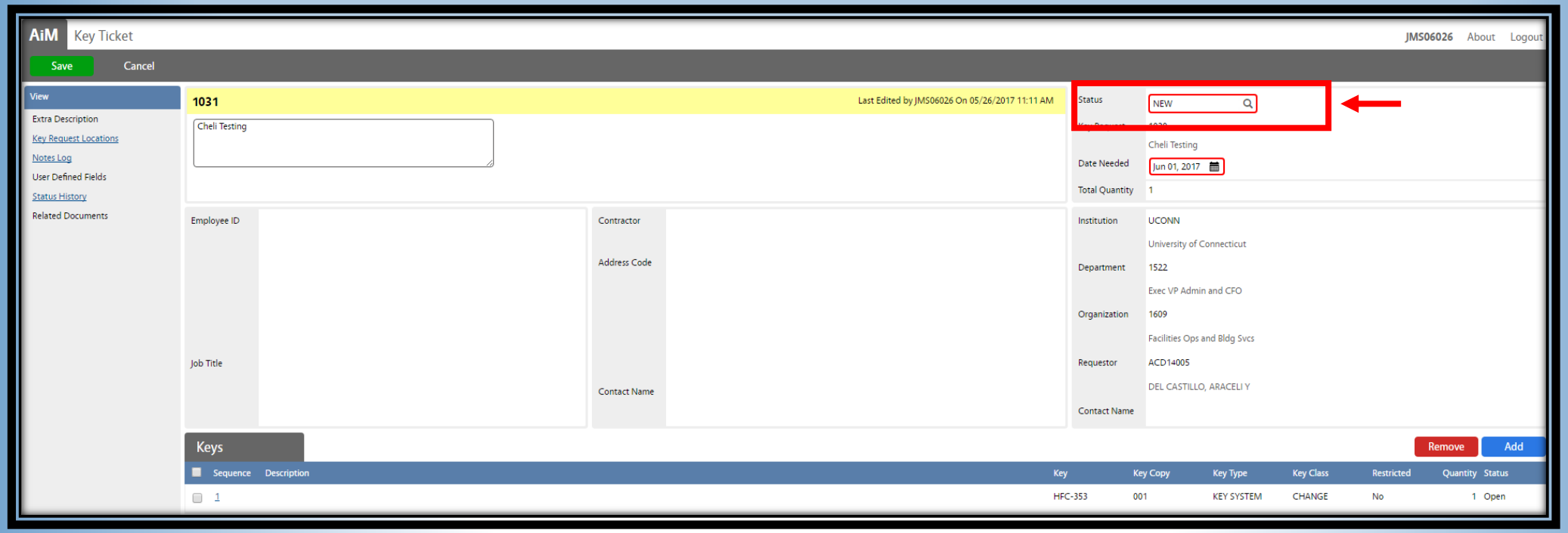
Select Key Ticket ID

New Key or Card Access Request – Update Key Ticket Status



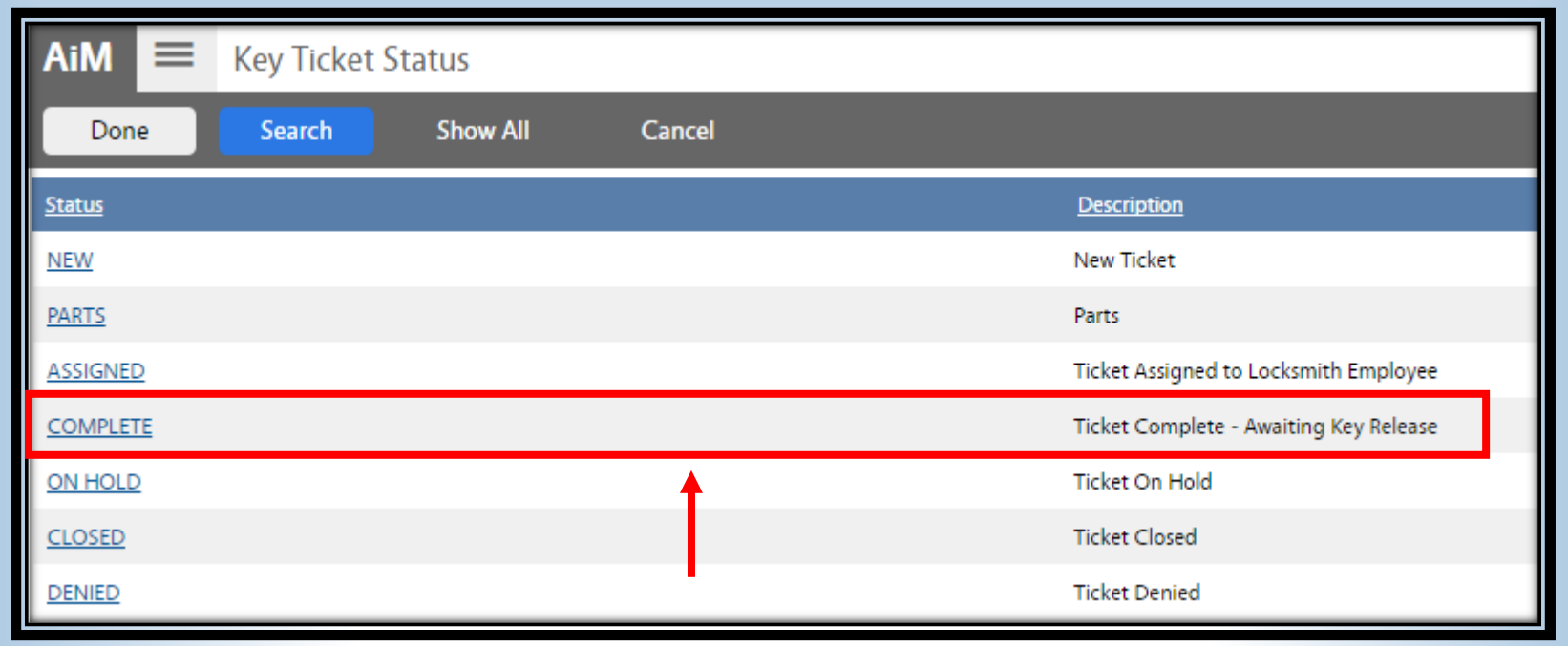
Click ***Edit***

New Key or Card Access Request – Update Key Ticket Status



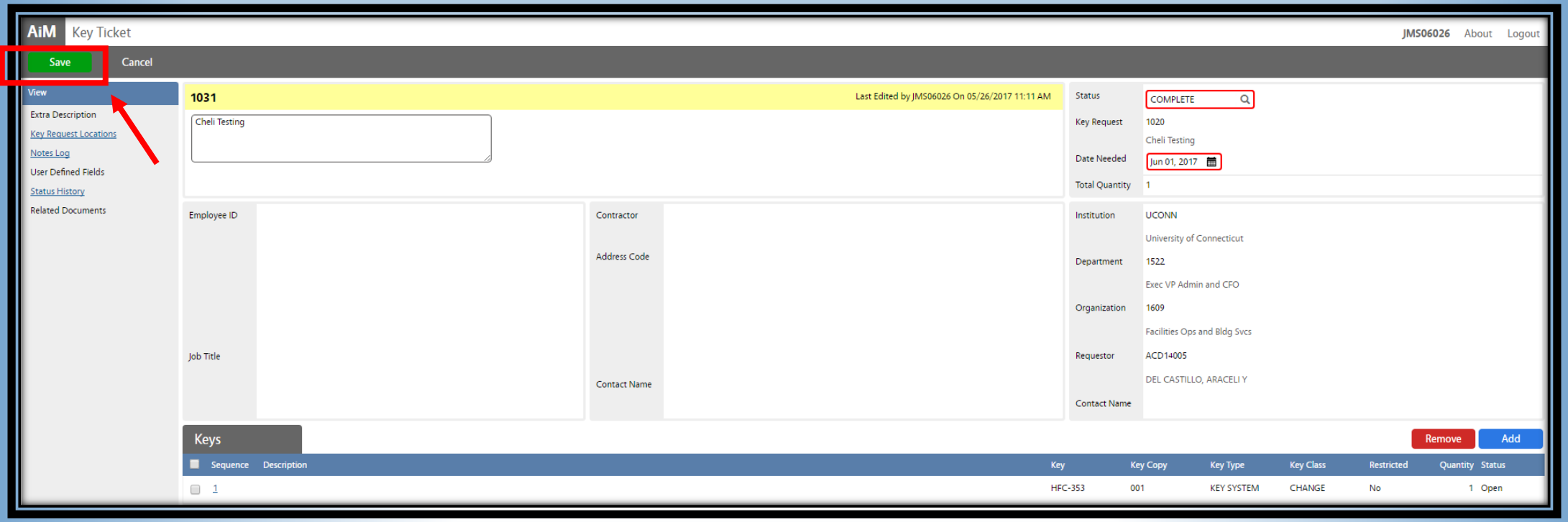
Click on New Status

New Key or Card Access Request – Update Key Ticket Status



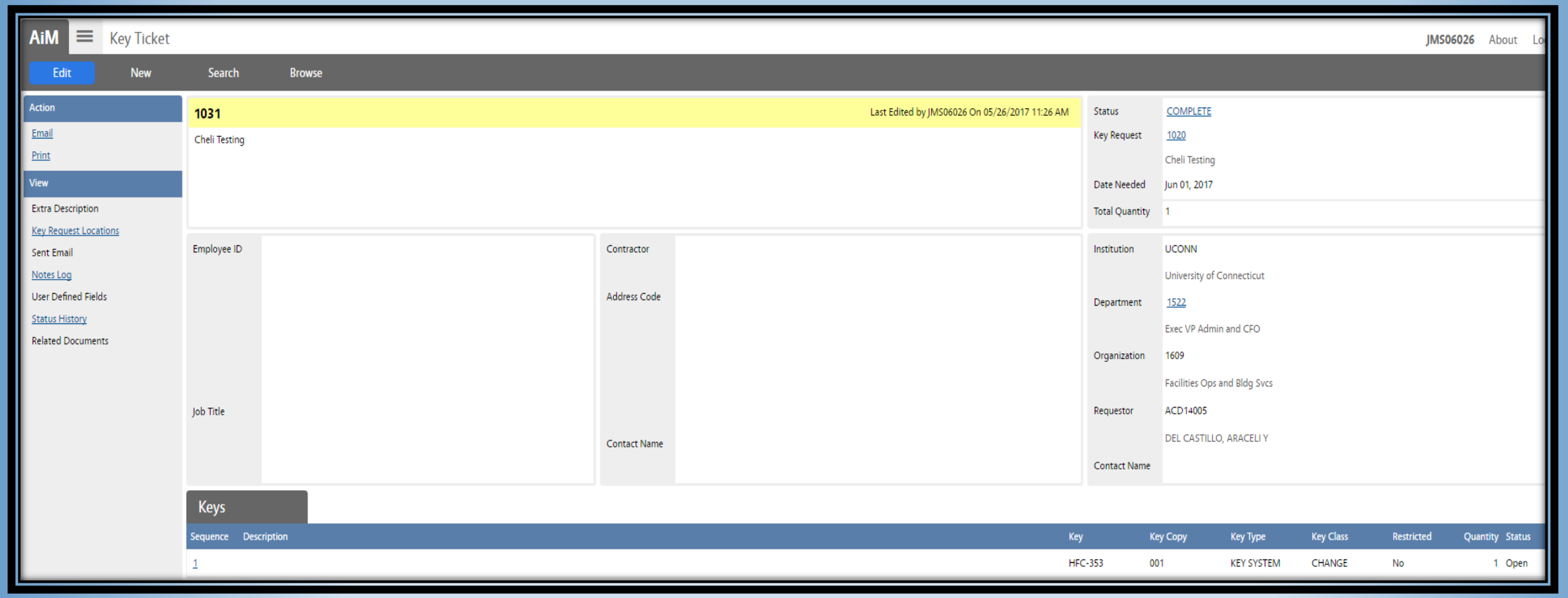
Select Key Ticket Status

New Key or Card Access Request – Update Key Ticket Status



Click ***Save***

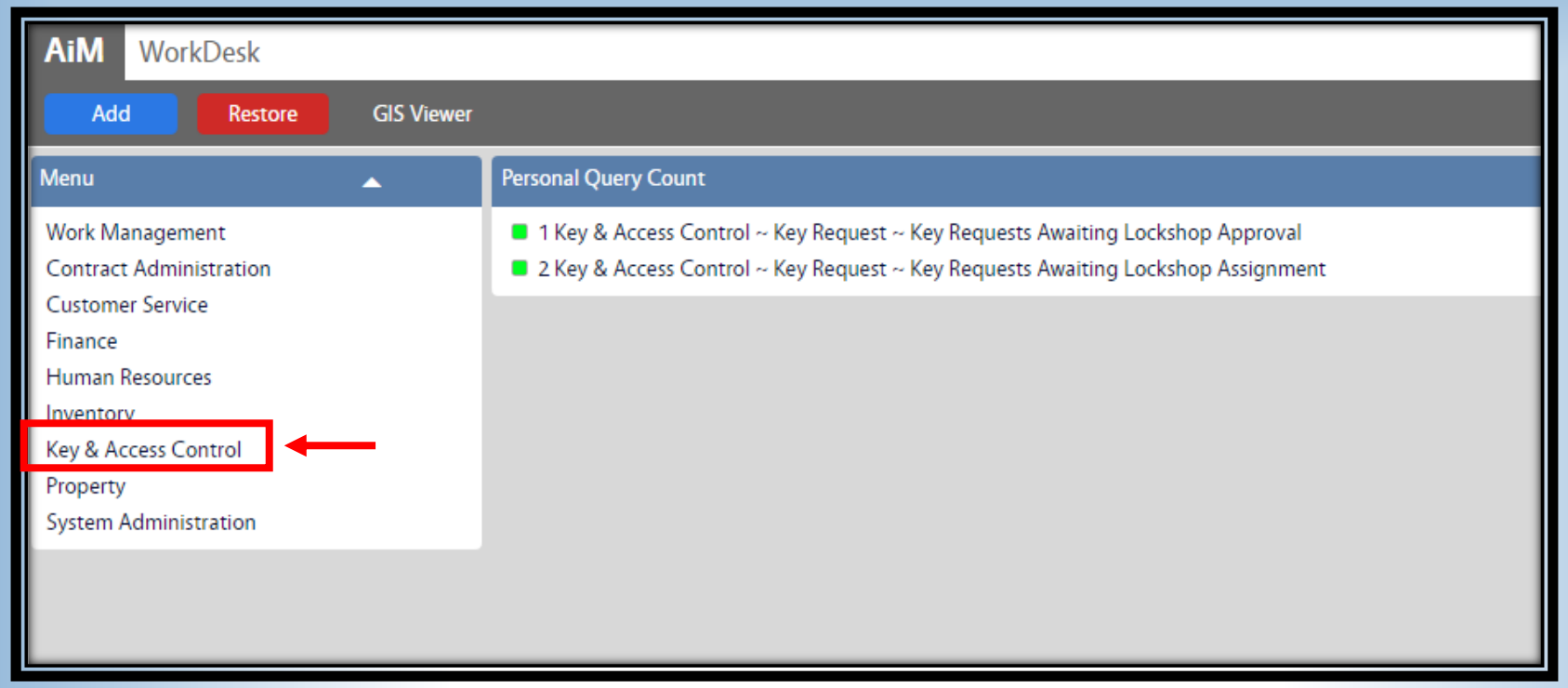
New Key or Card Access Request – Update Key Ticket Status



New Key or Card Access Request – Update Key Ticket Status

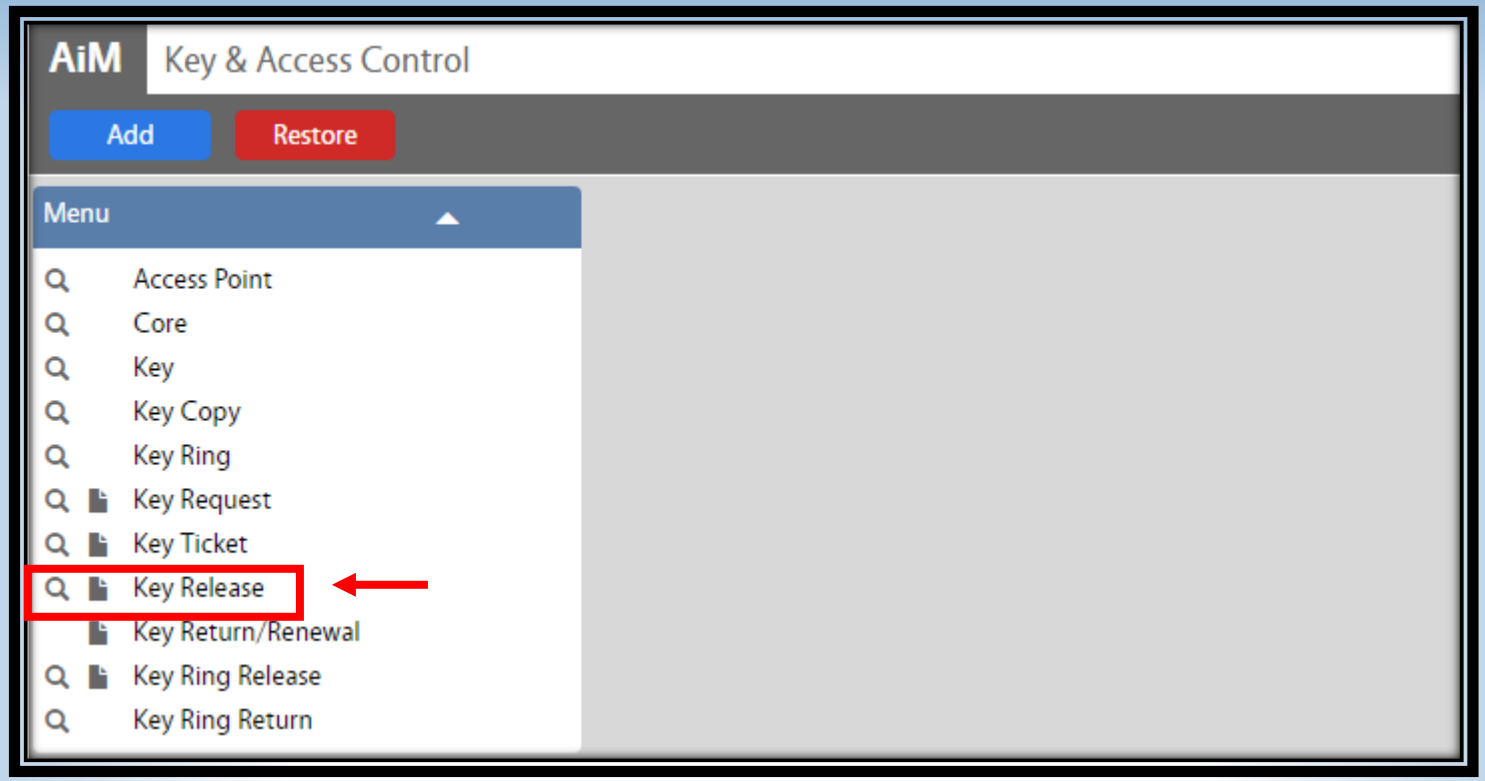
New Key or Card Access Request

Key Release



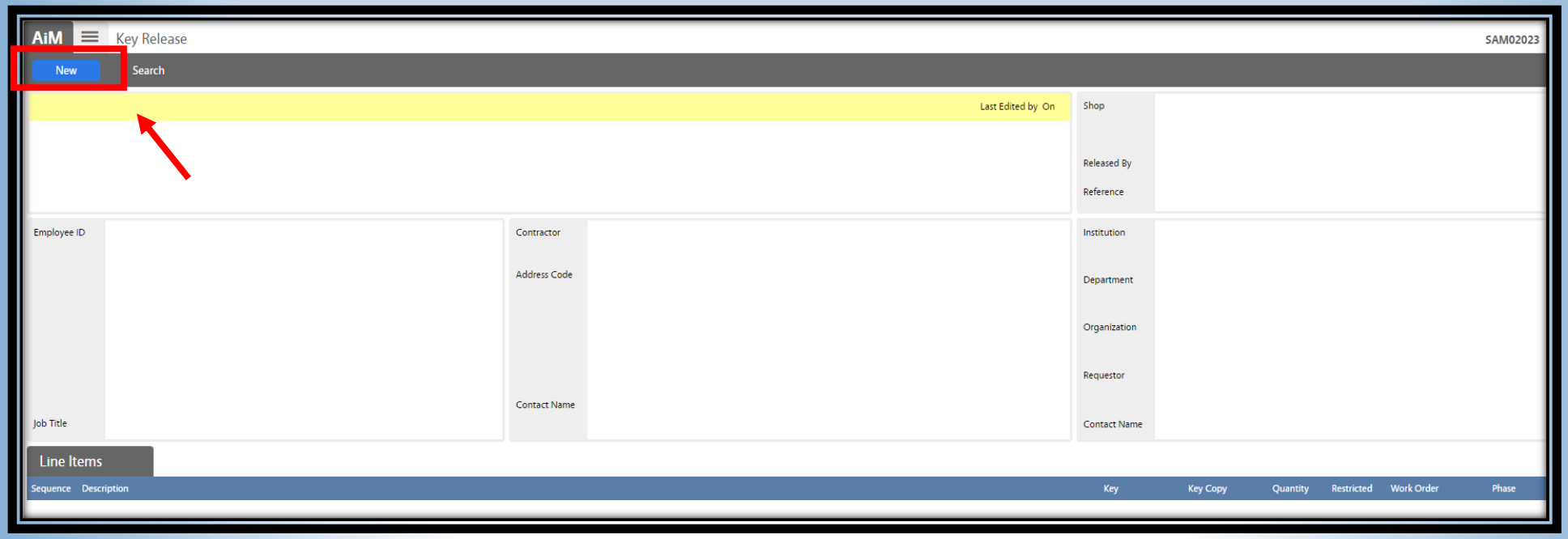
On WorkDesk click *Key & Access Control* module

New Key or Card Access Request – Key Ticket Release



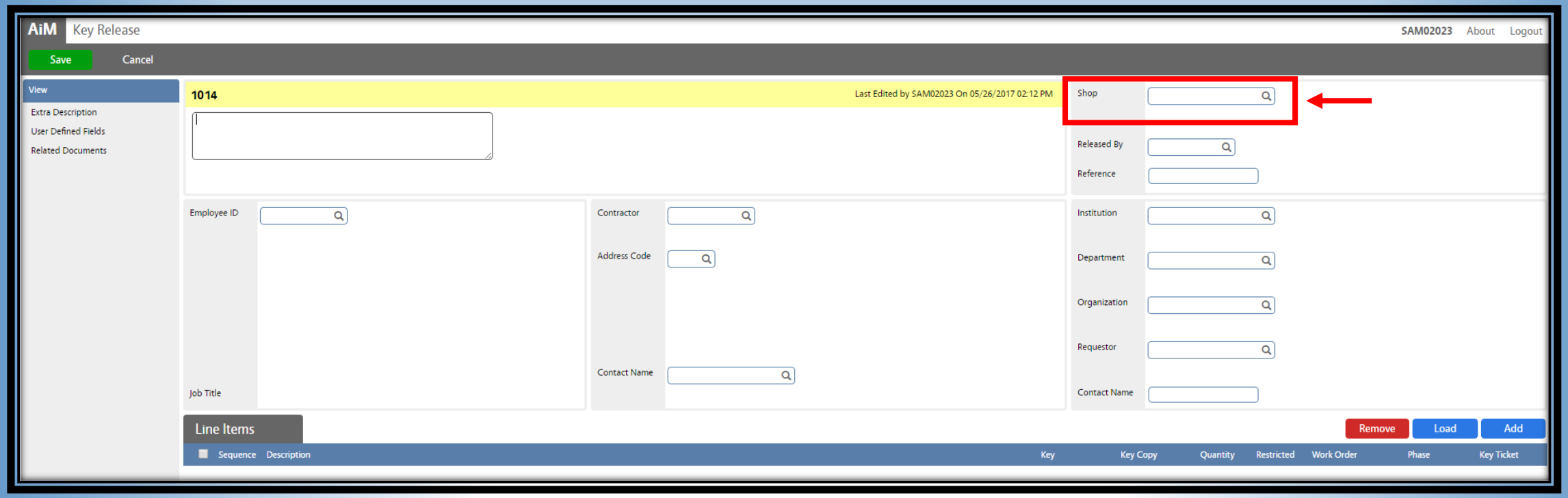
Click Key Release

New Key or Card Access Request – Key Ticket Release



Click ***New***

New Key or Card Access Request – Key Ticket Release

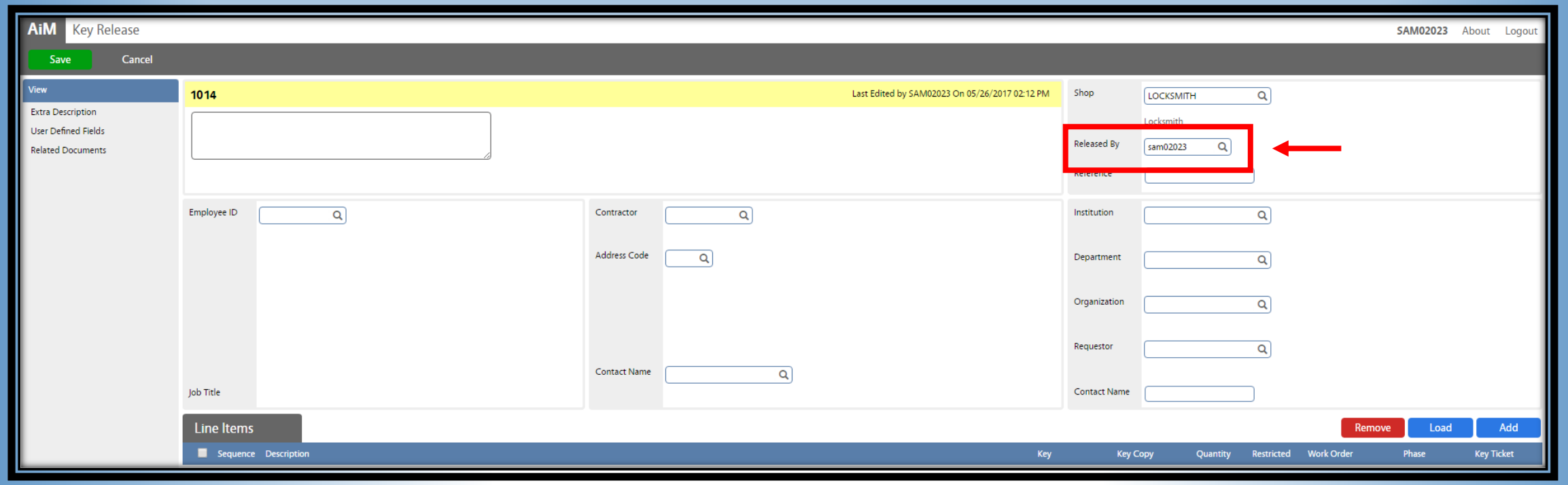


Search Shop

New Key or Card Access Request – Key Ticket Release

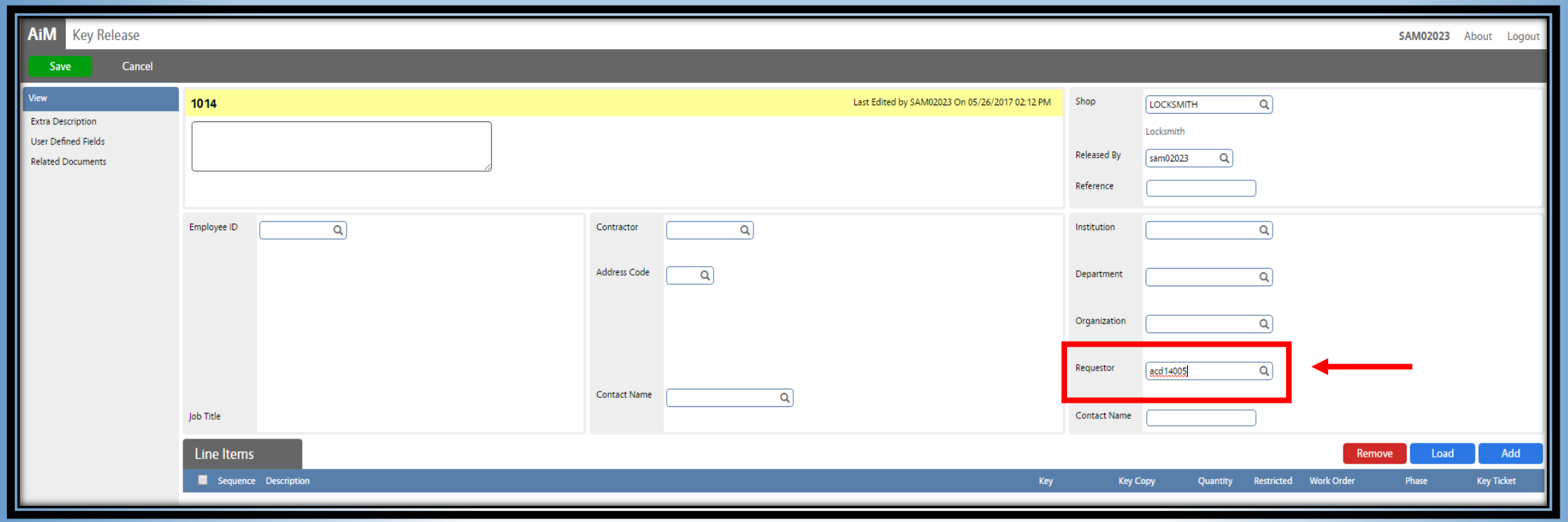
Select “Locksmith”

New Key or Card Access Request –Key Ticket Release



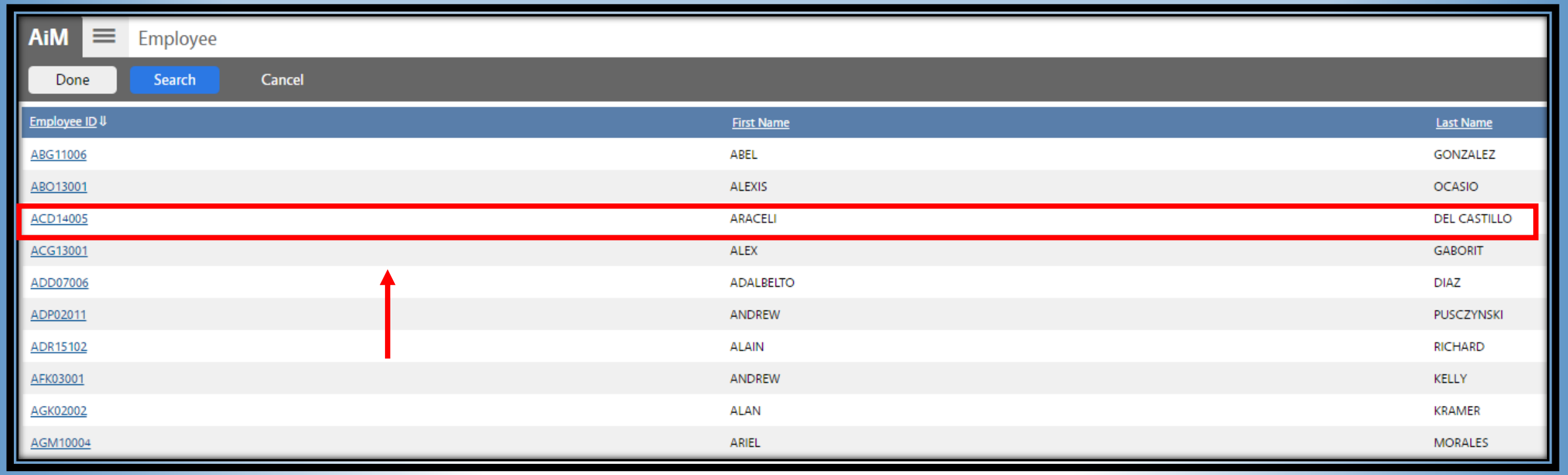
Enter/search Net ID on Release
By field

New Key or Card Access Request – Key Ticket Release



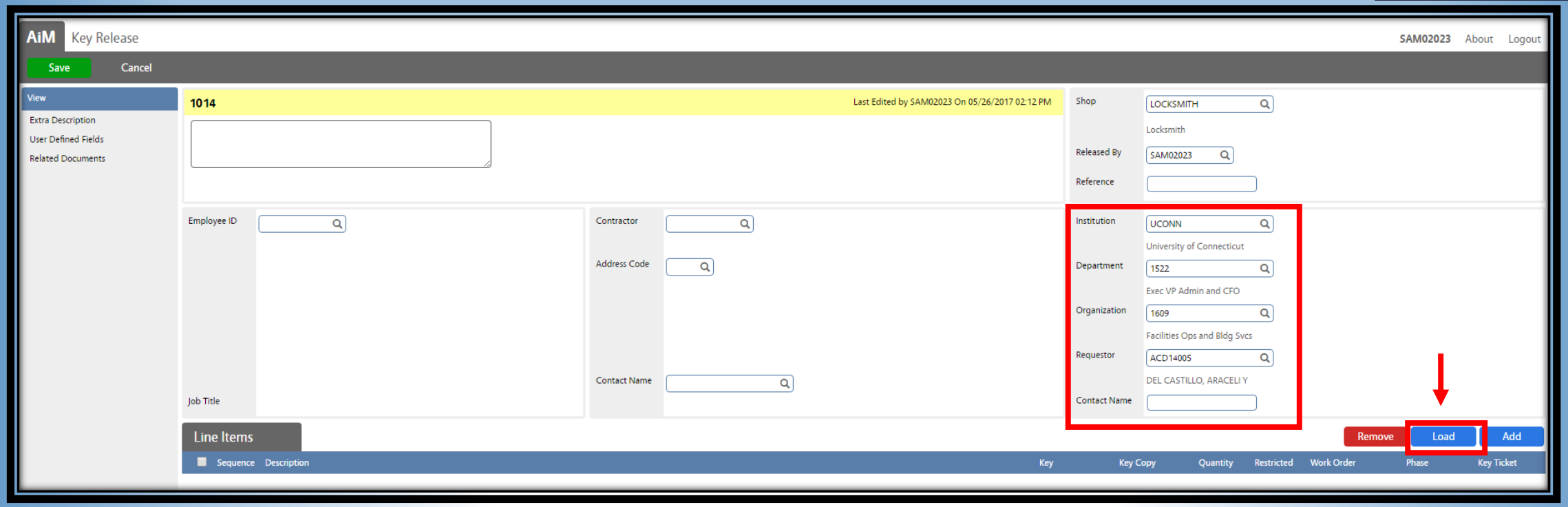
Enter/Search Requestor (Net ID)

New Key or Card Access Request – Key Ticket Release



Select Net ID

New Key or Card Access Request – Key Ticket Release



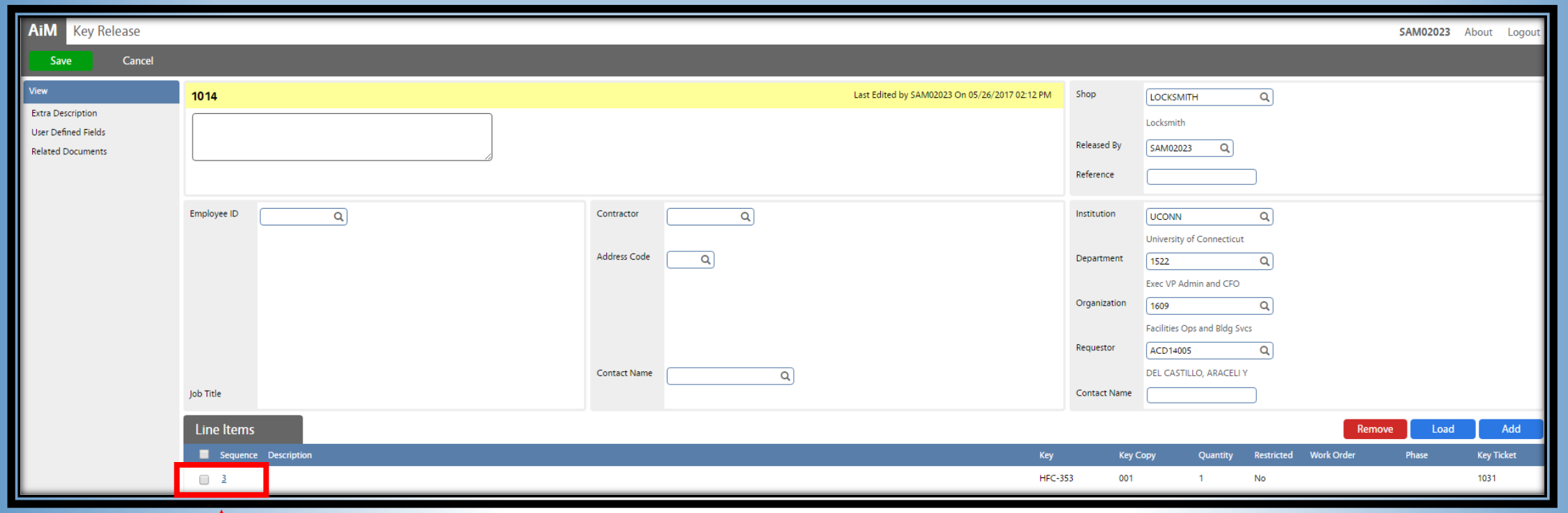
Note: Location information is automatically populated

Click ***Load***

New Key or Card Access Request – Key Ticket Release

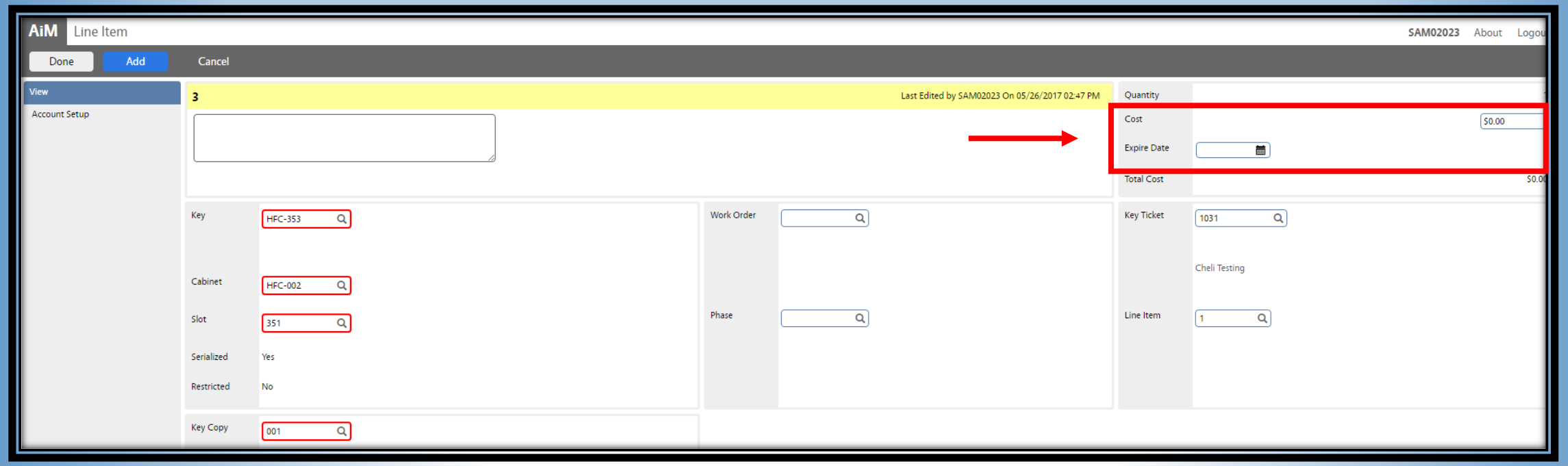
Select Key Ticket ID, then click ***Done***

New Key or Card Access Request – Key Ticket Release



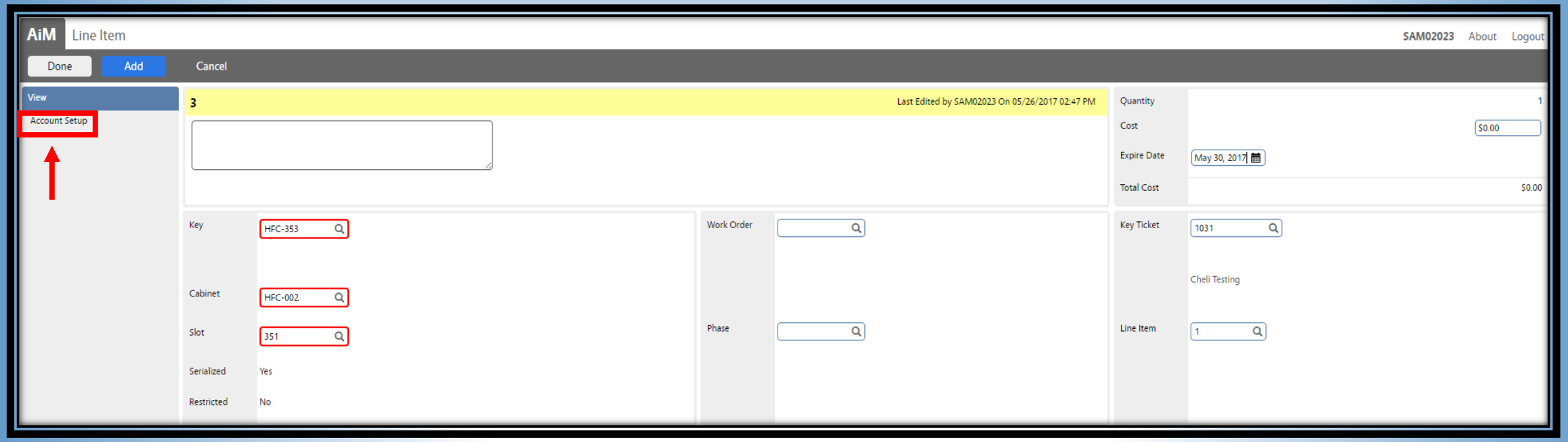
Under Line Items section, click on the key to be released

New Key or Card Access Request – Key Ticket Release



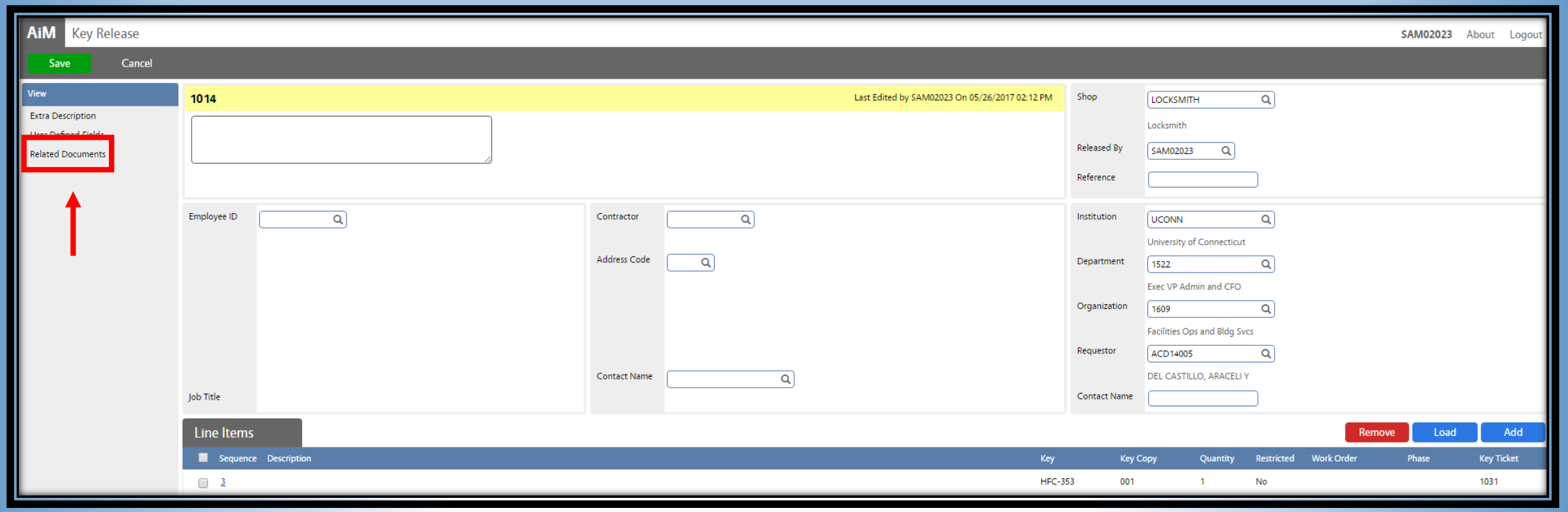
Enter Expiration Date and Cost if applicable

New Key or Card Access Request – Key Ticket Release



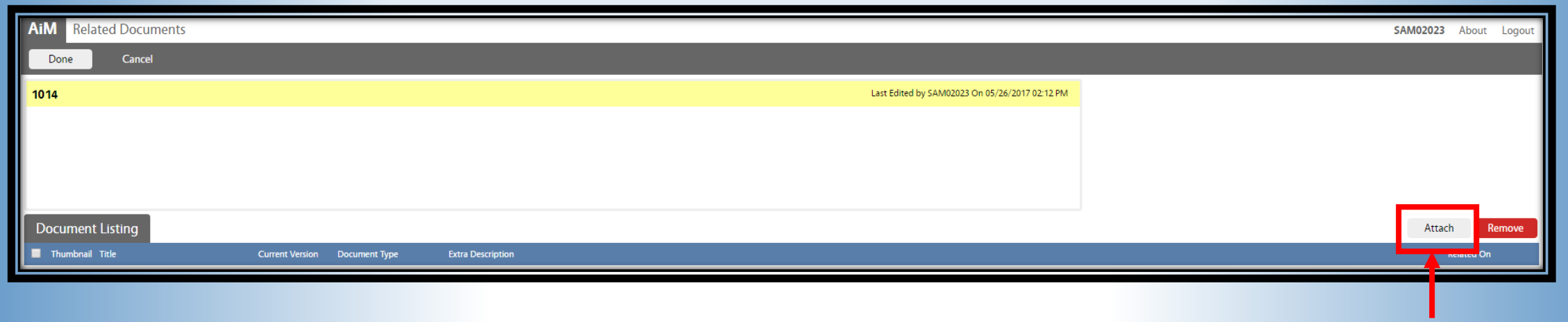
If there is a cost, go to *Account Set-Up* link, select Account and click ***Done***

New Key or Card Access Request – Key Ticket Release



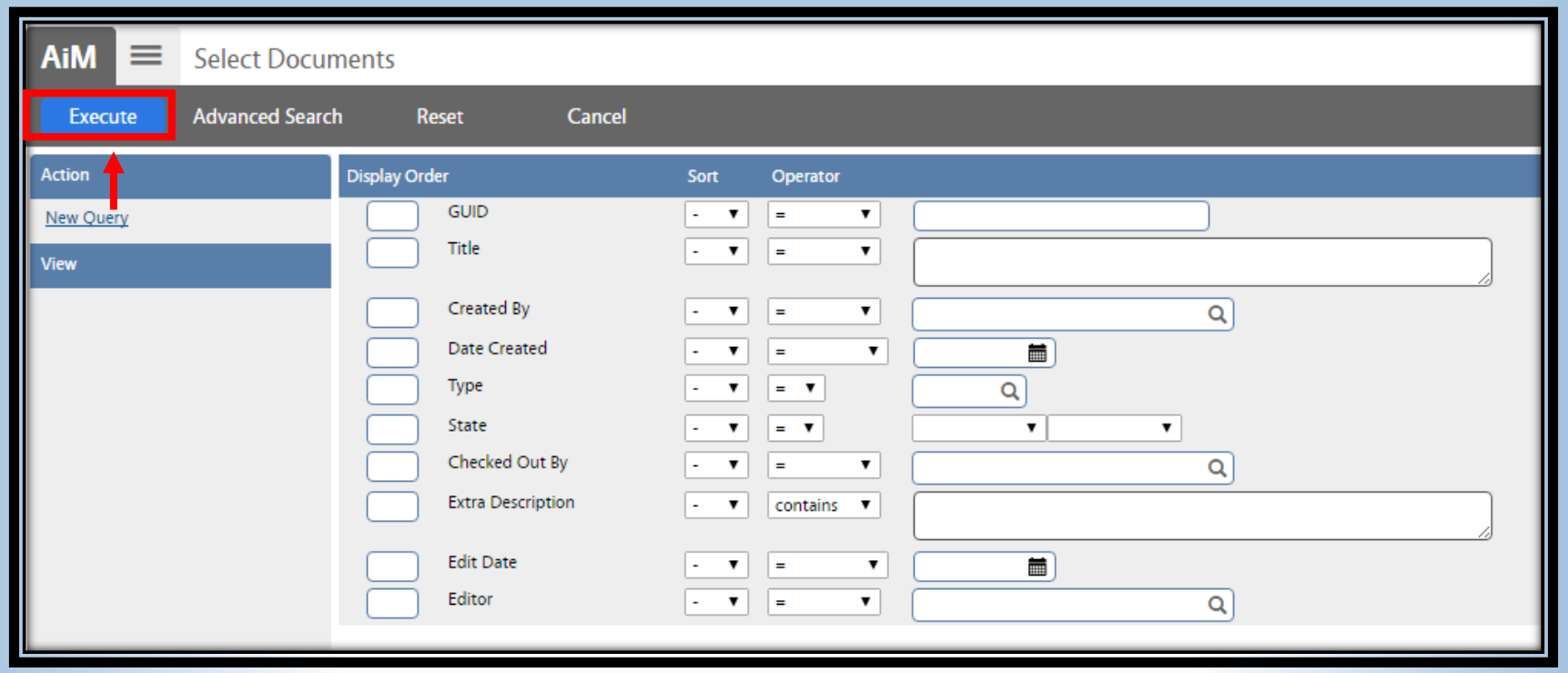
You can load more keys and add signature images
on *Related Document* section

New Key or Card Access Request – Key Ticket Release



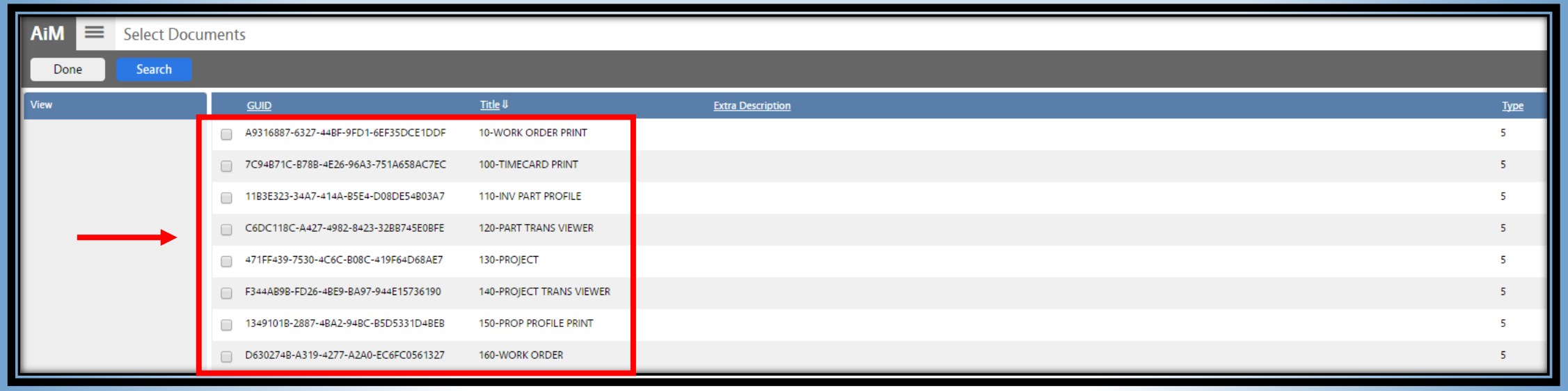
Click ***Attach***

New Key or Card Access Request – Key Ticket Release



Search for attachment

New Key or Card Access Request – Key Ticket Release

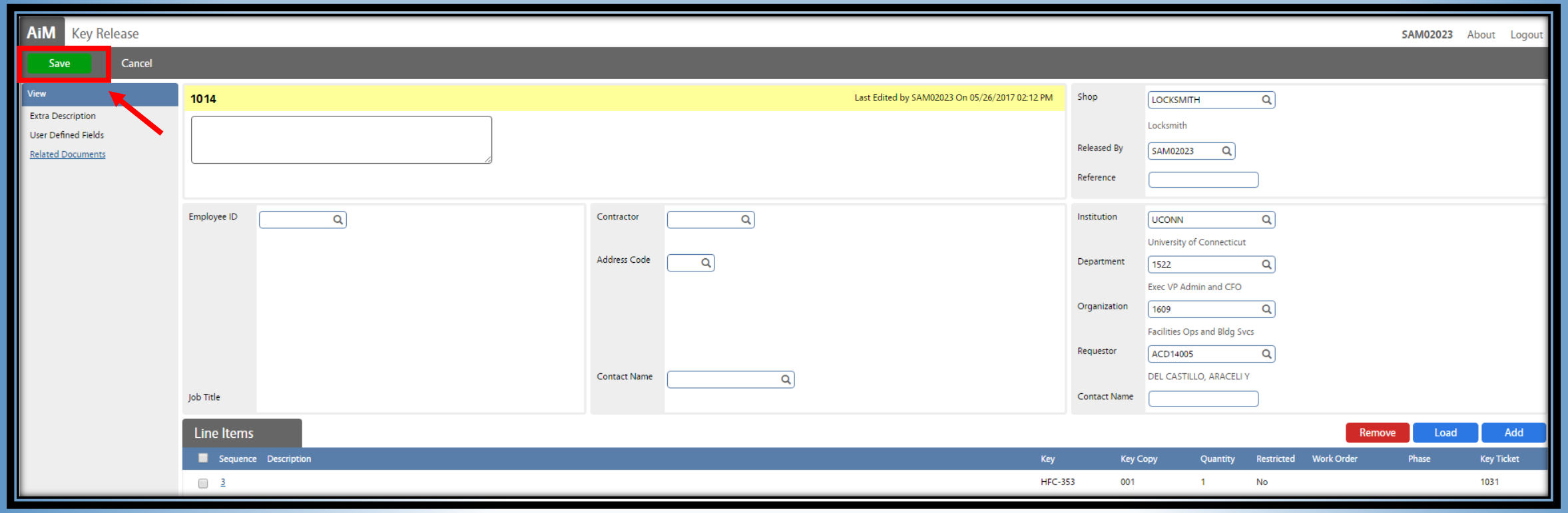


Select attachment

New Key or Card Access Request – Key Ticket Release

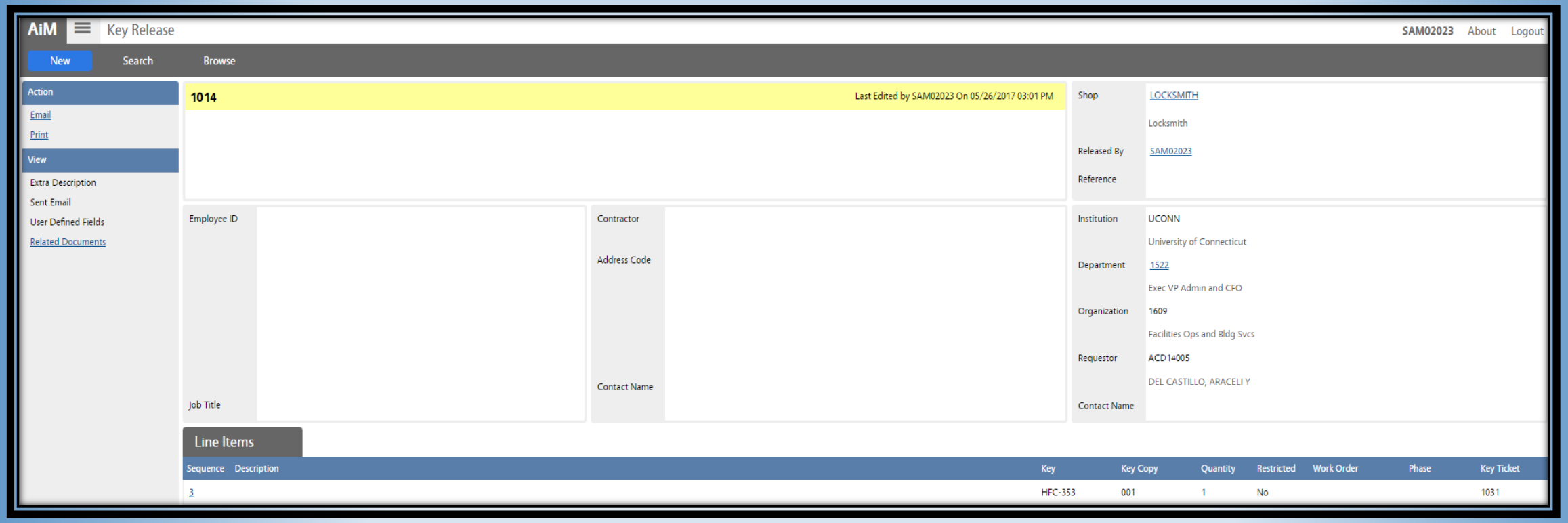
Click ***Done***

New Key or Card Access Request – Key Ticket Release



Click ***Save***

New Key or Card Access Request – Key Ticket Release

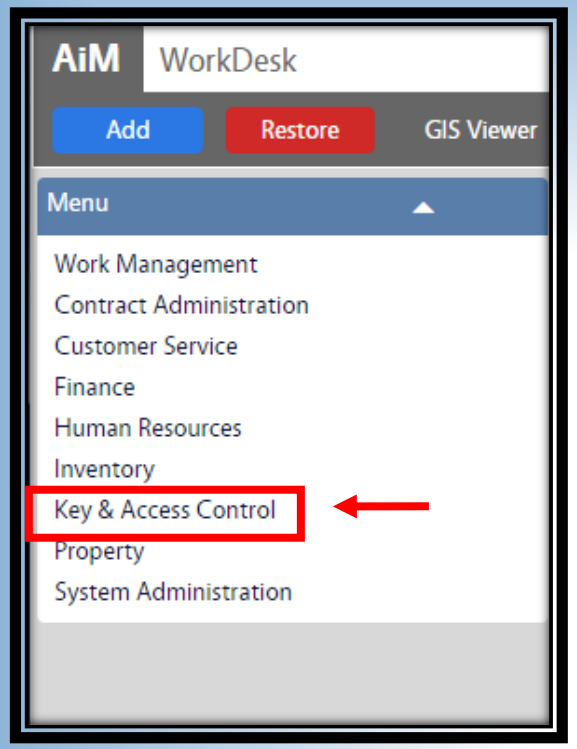


New Key or Card Access Request – Key Ticket Release

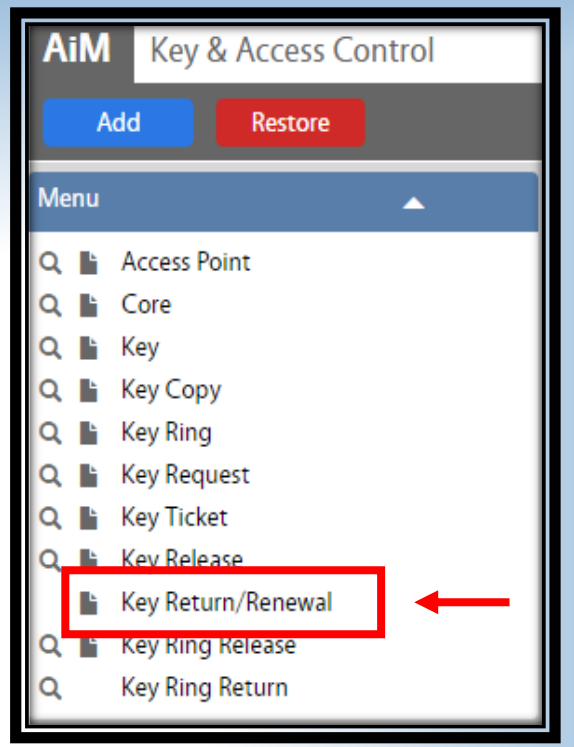
New Key or Card Access Request

Key Return/Renewal

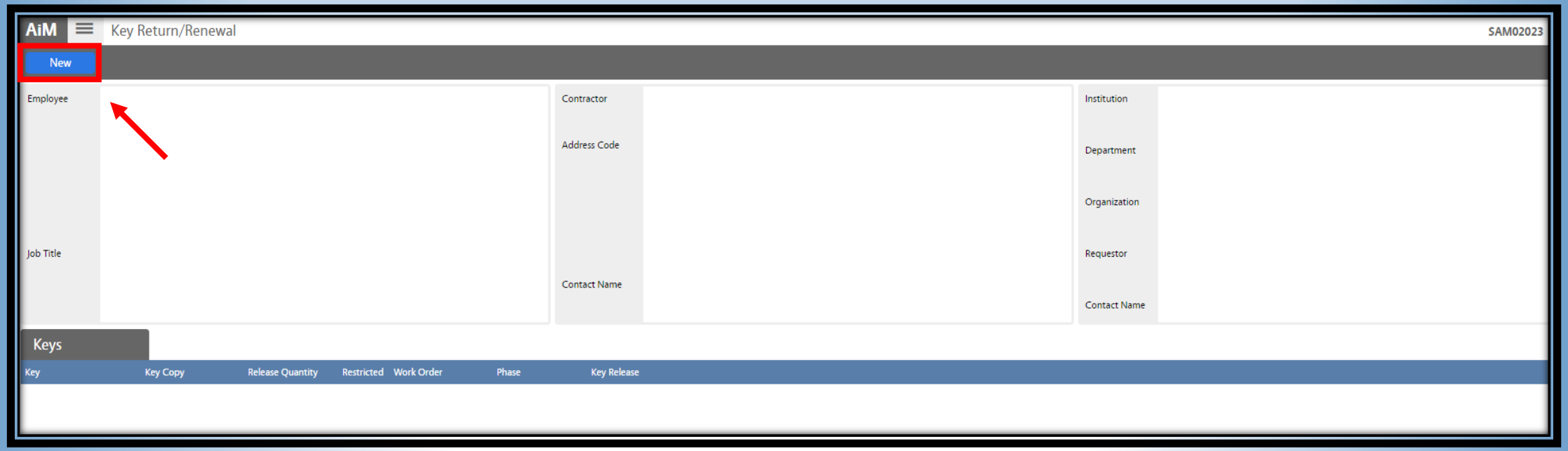
Key Return



On *WorkDesk*, click Key & Access Control, then click Key Return/Renewal



New Key or Card Access Request – Key Ticket Return



Click ***New***

New Key or Card Access Request – Key Ticket Return

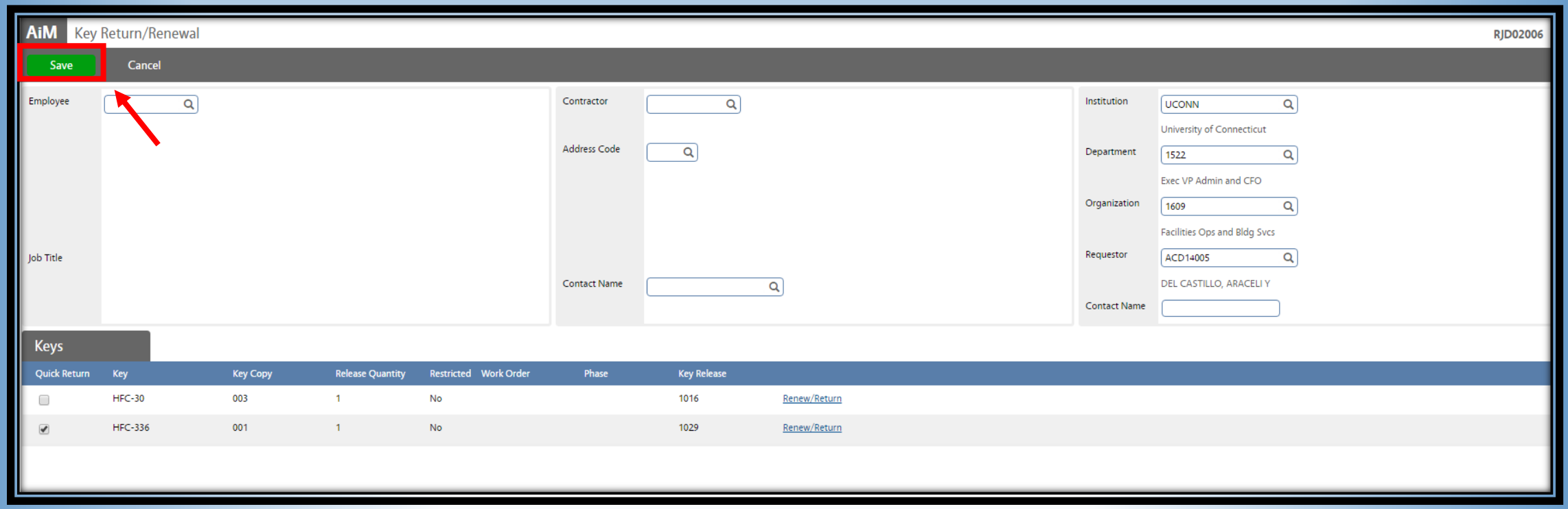
Enter/search Requestor

New Key or Card Access Request – Key Ticket Return

Note: Location information is automatically populated

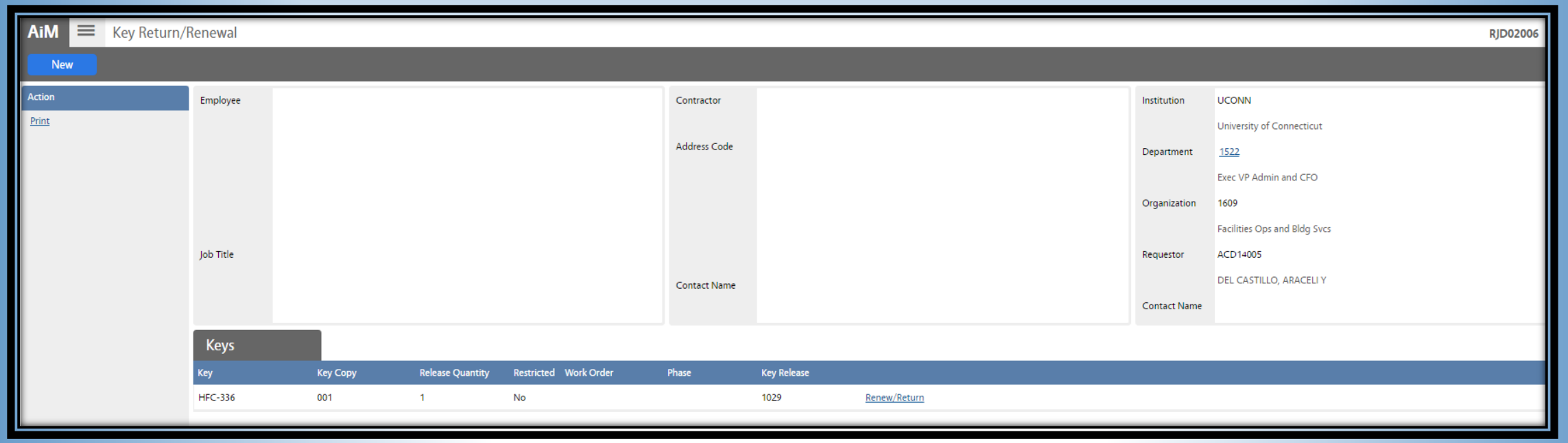
Click ***Load***

New Key or Card Access Request – Key Ticket Return



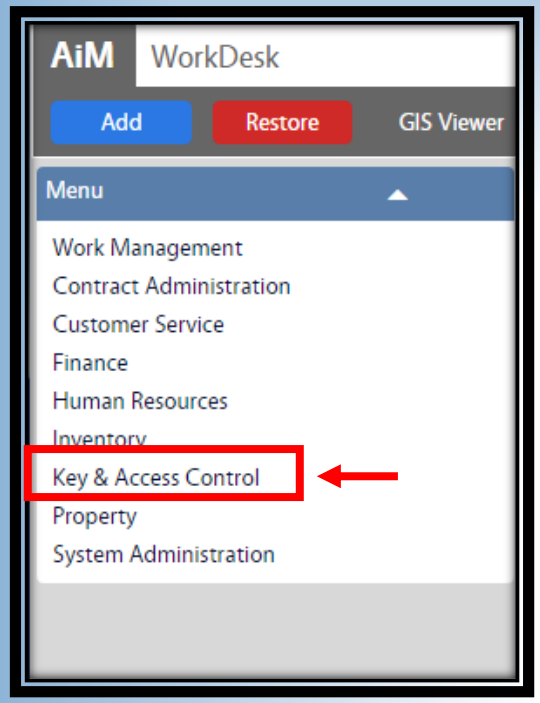
Select key and click ***Save***

New Key or Card Access Request – Key Ticket Return

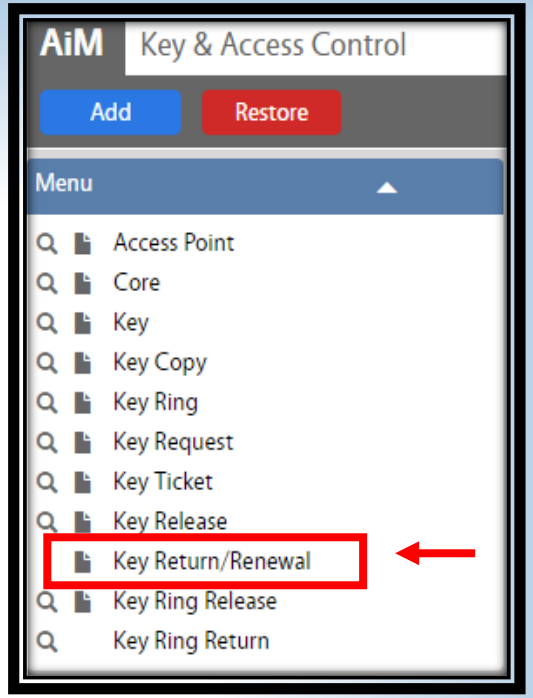


New Key or Card Access Request – Key Ticket Return

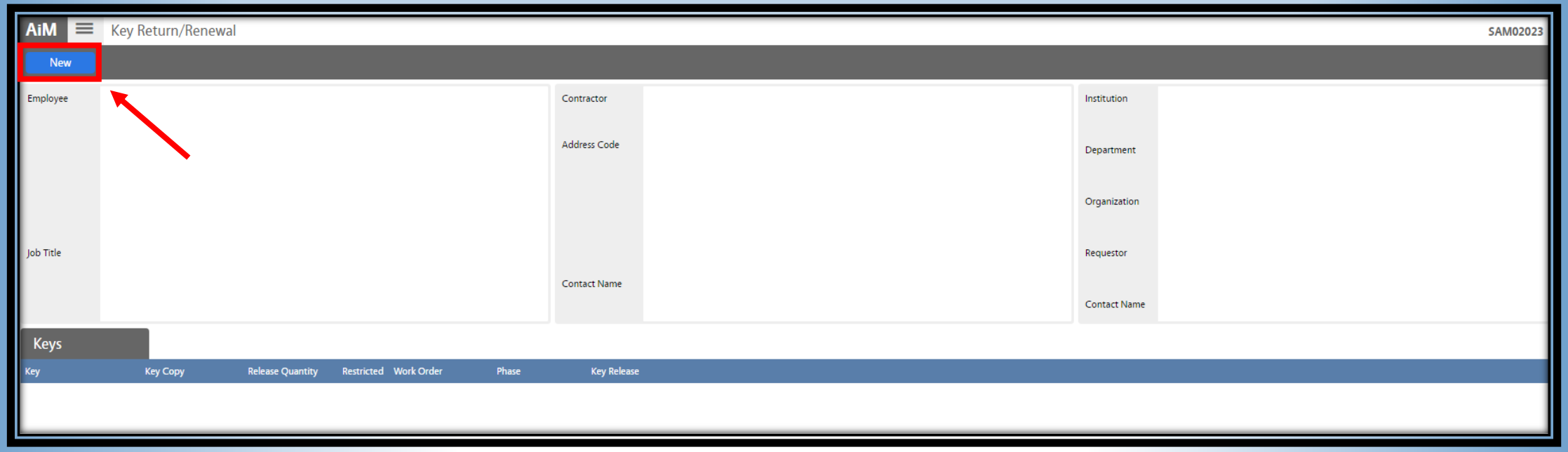
Key Renewal



On *WorkDesk*, click Key & Access Control, then click Key Return/Renewal



New Key or Card Access Request – Key Ticket Renewal



Click ***New***

New Key or Card Access Request – Key Ticket Renewal

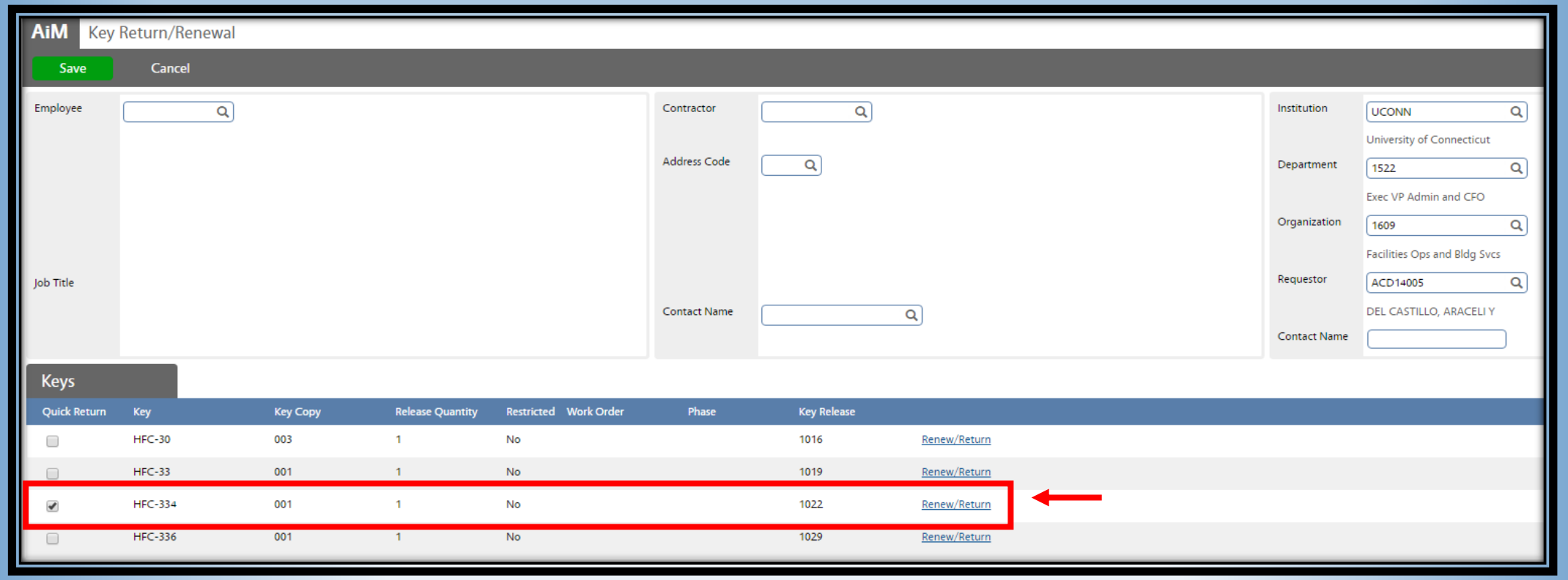
Enter/search Requestor

New Key or Card Access Request – Key Ticket Renewal

Note: Location information is automatically populated

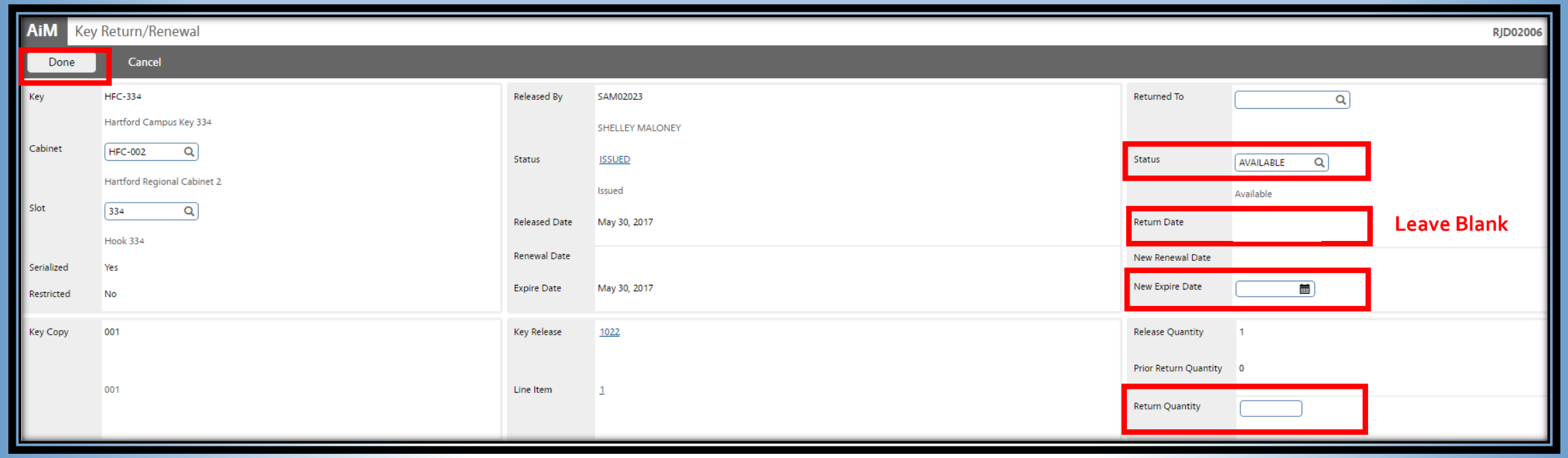
Click ***Load***

New Key or Card Access Request – Key Ticket Renewal



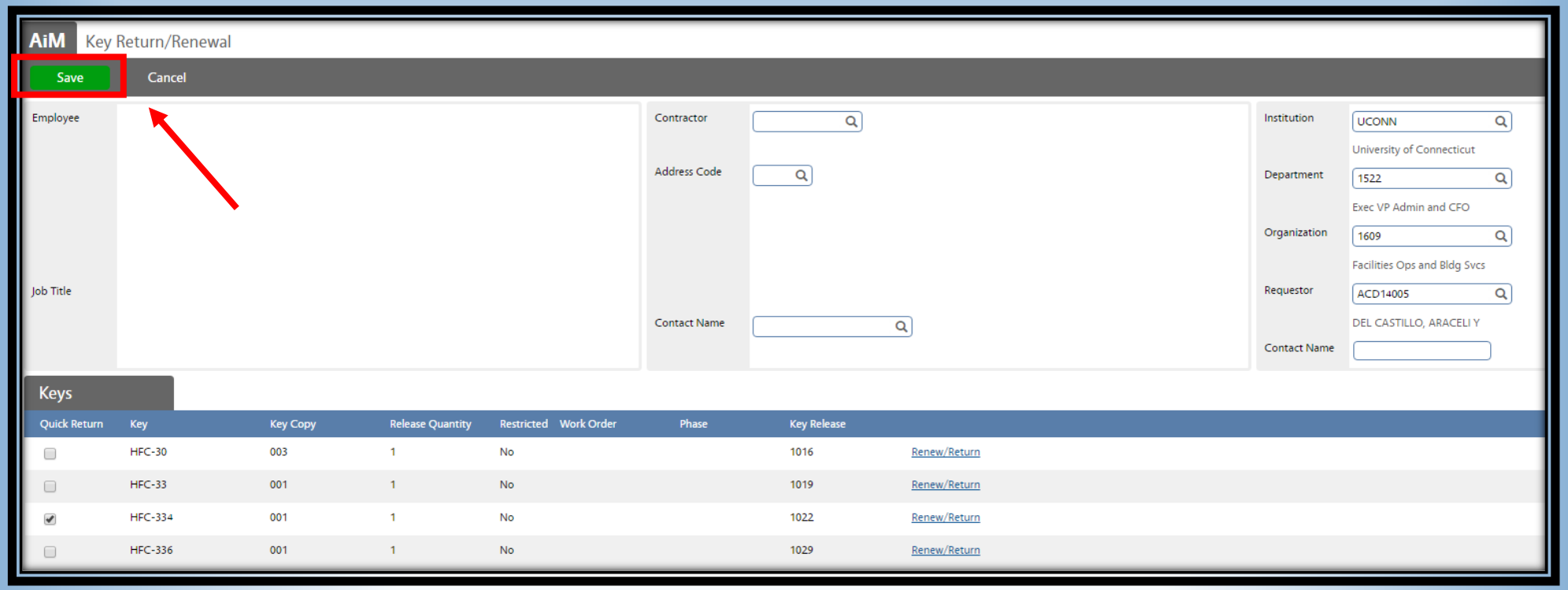
Select Key and click “Return/Renew” link

New Key or Card Access Request – Key Ticket Renewal



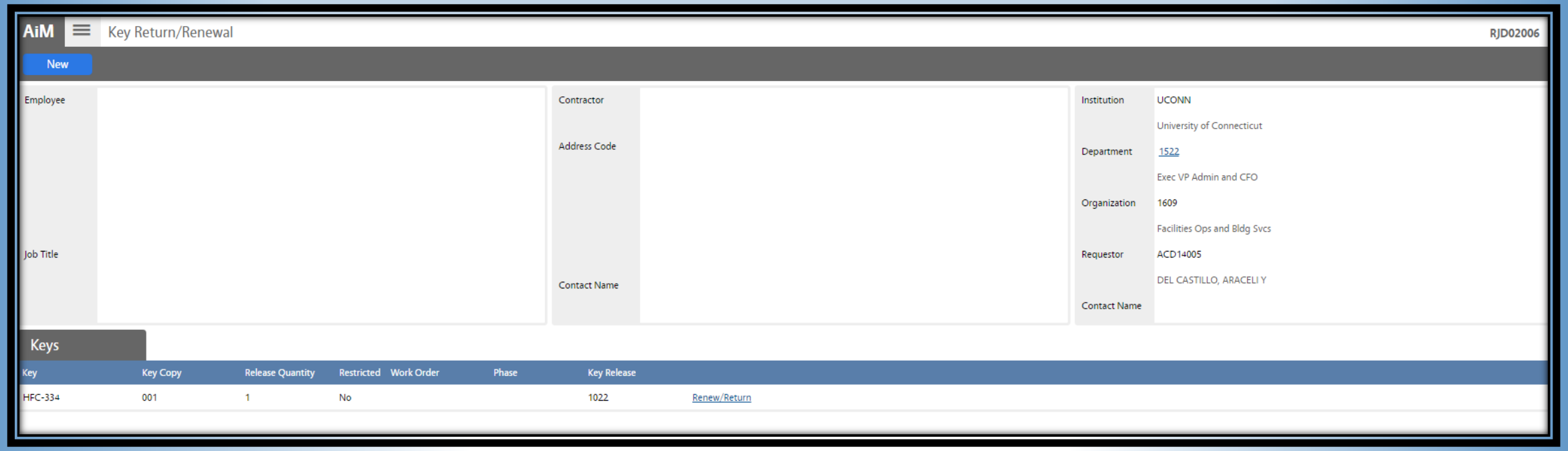
Verify/update Status, enter new Expiration Date and update Quantity, then click ***Done***
Note: Return Date should be blank

New Key or Card Access Request – Key Ticket Renewal



Click ***Save***

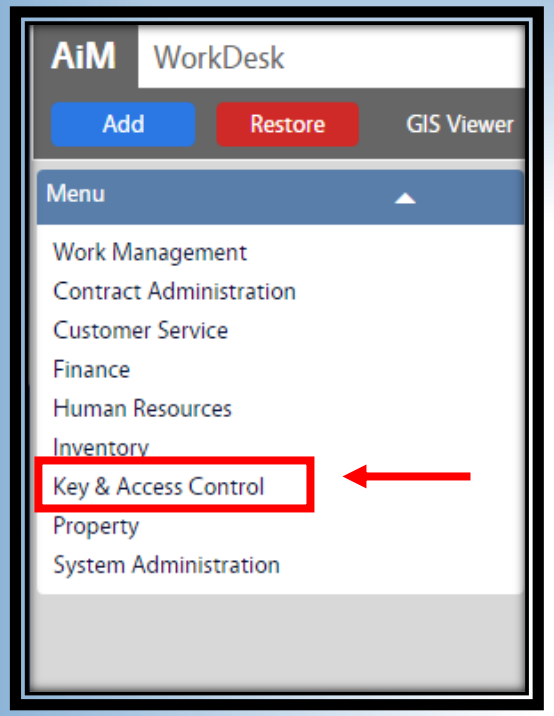
New Key or Card Access Request – Key Ticket Renewal



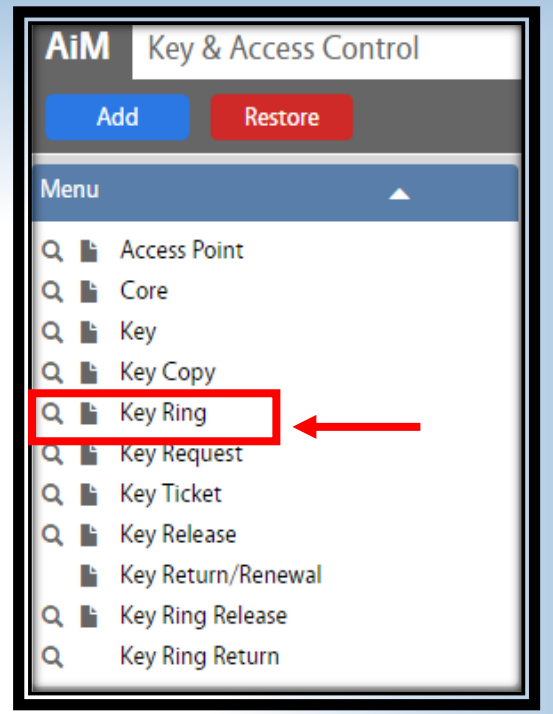
New Key or Card Access Request – Key Ticket Renewal

New Key or Card Access Request

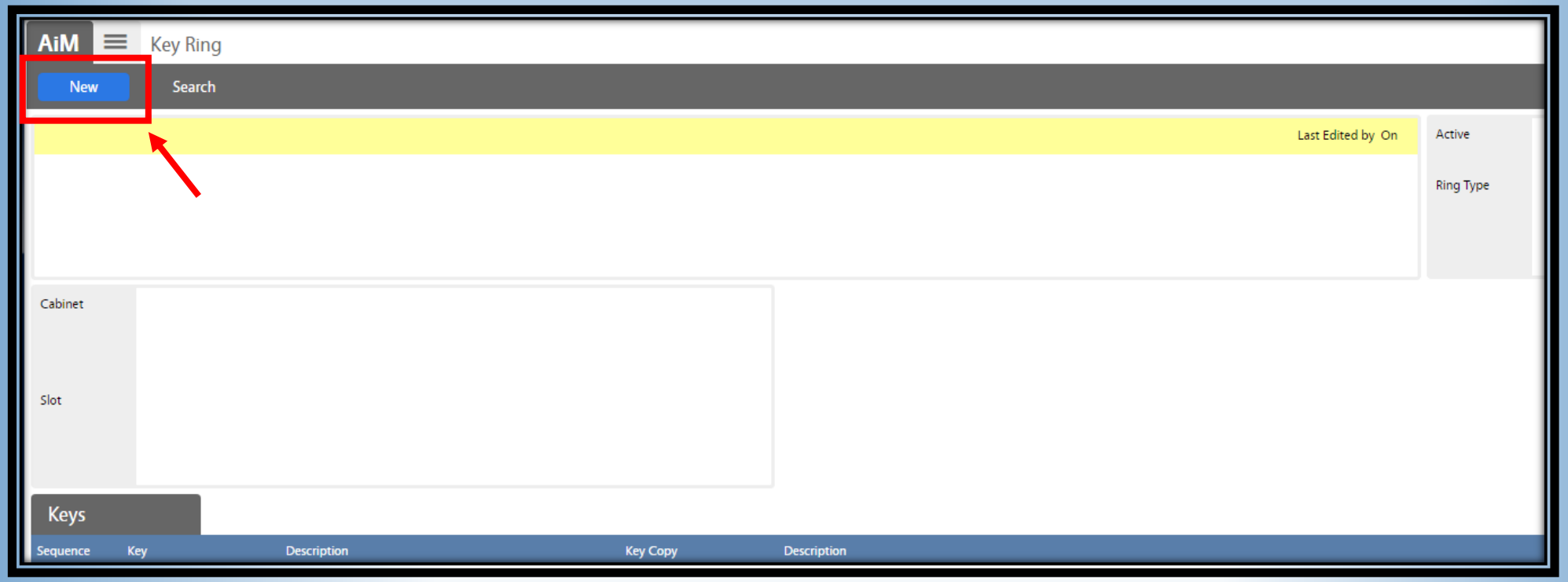
Key Ring



On *WorkDesk*, click Key & Access Control, then click Key Ring

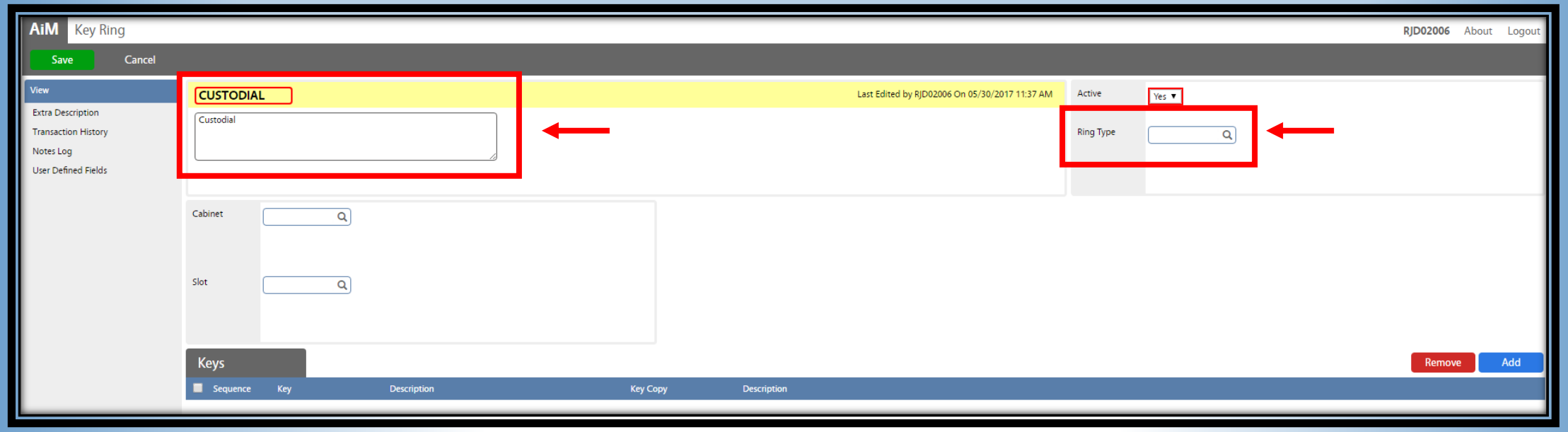


New Key or Card Access Request – Create Key Ring



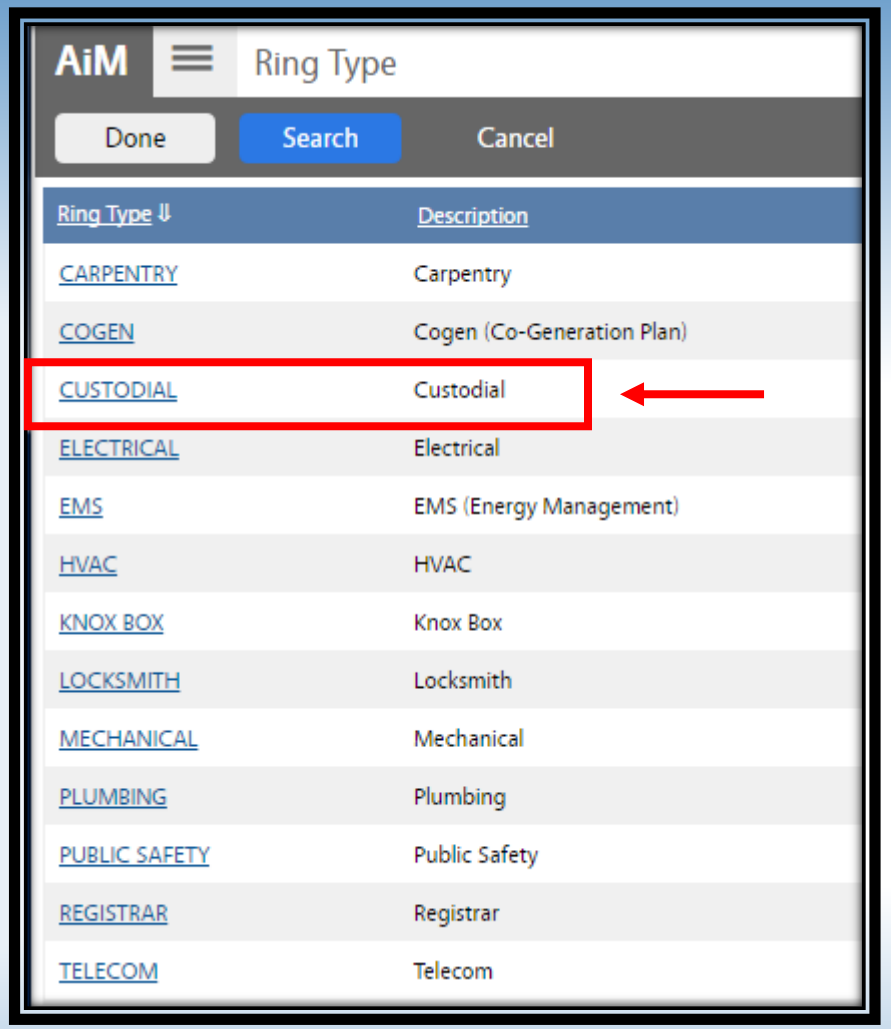
Click ***New***

New Key or Card Access Request – Create Key Ring



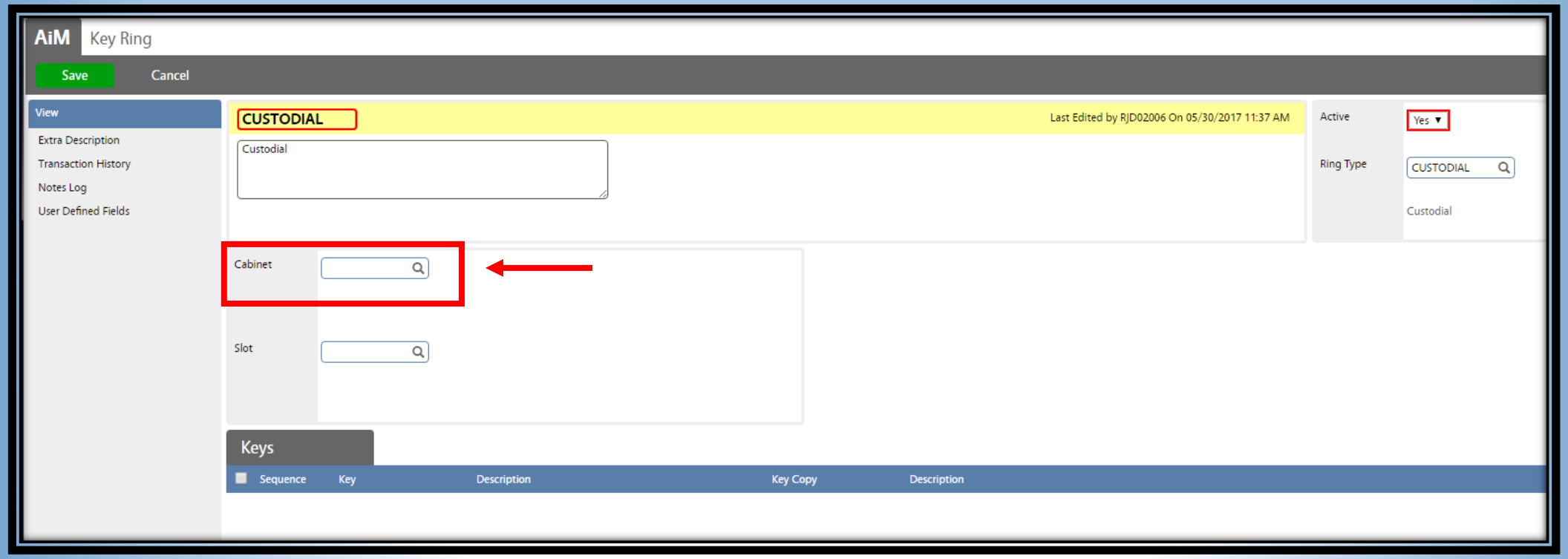
Enter Key Ring name and description,
then search Ring Type

New Key or Card Access Request – Create Key Ring



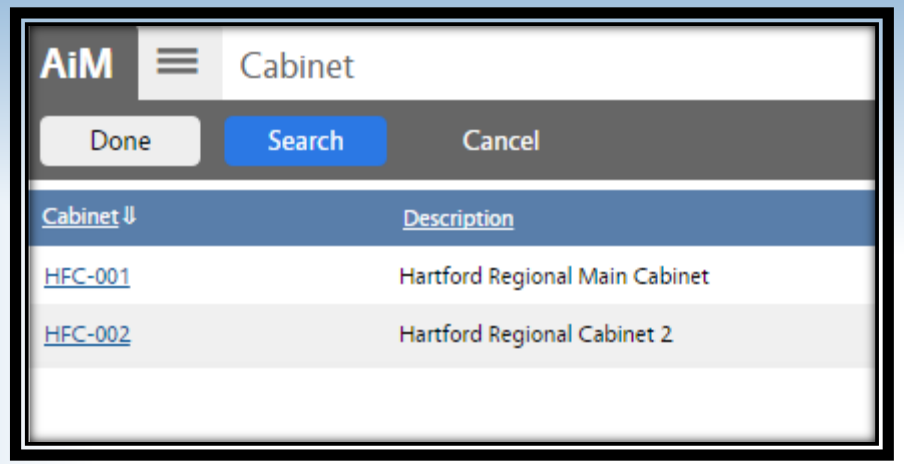
Select Ring Type

New Key or Card Access Request – Create Key Ring



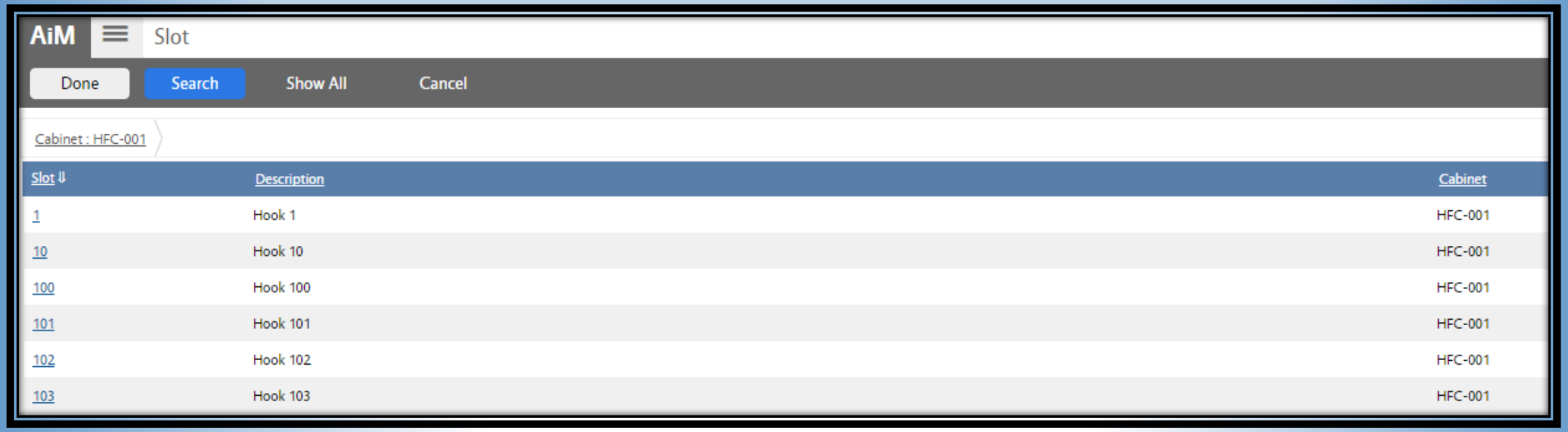
Search Cabinet

New Key or Card Access Request – Create Key Ring



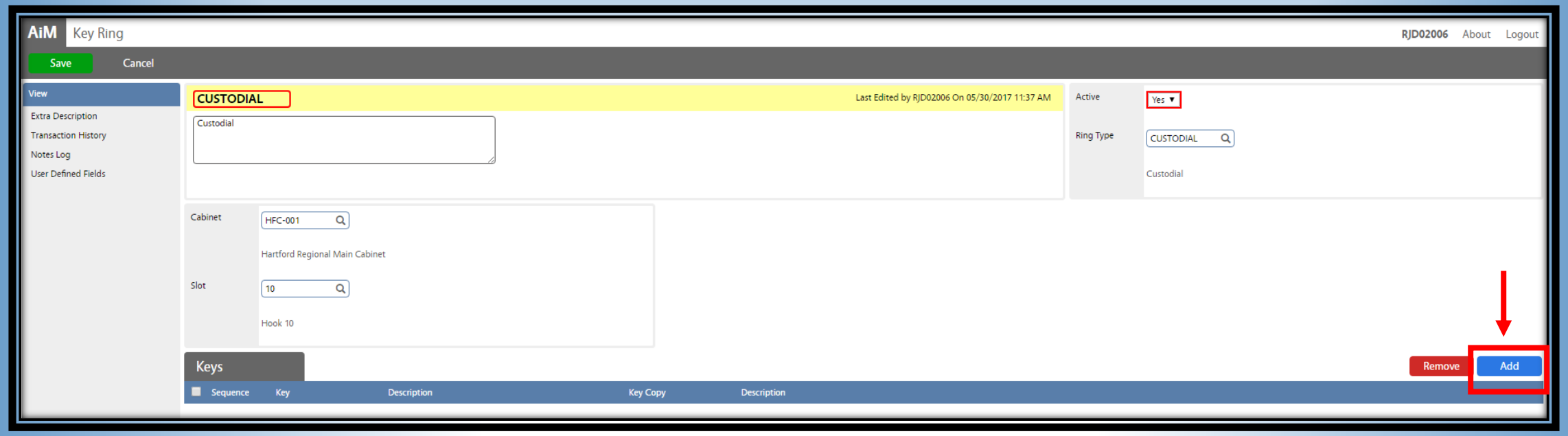
Select Cabinet

New Key or Card Access Request – Create Key Ring



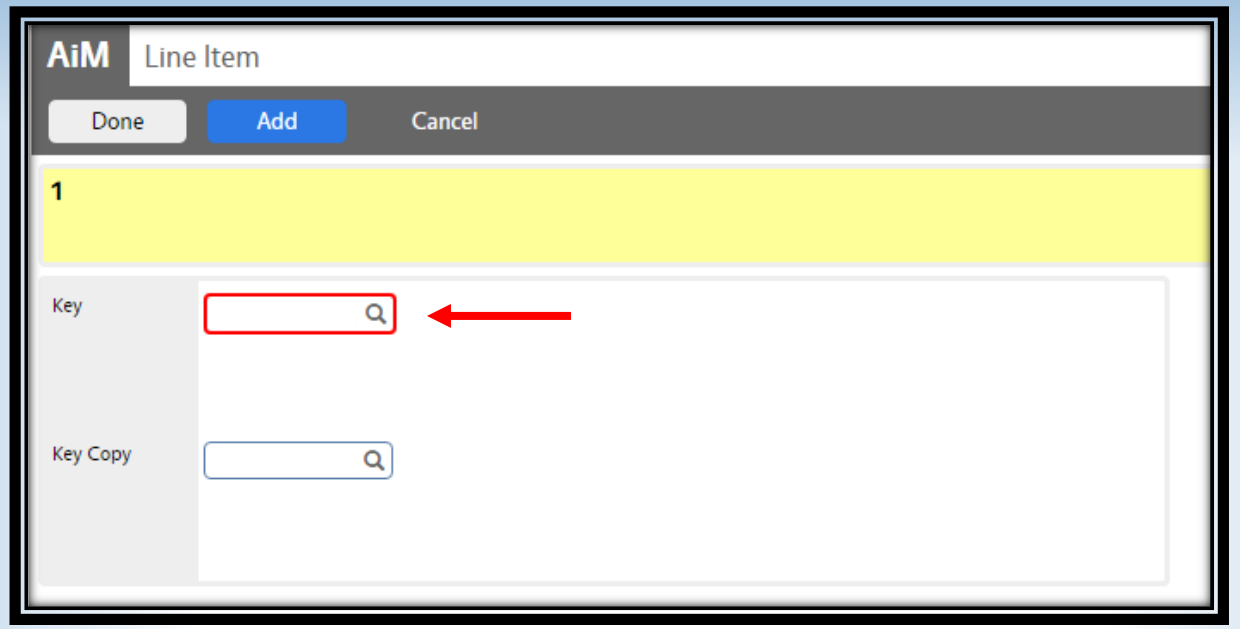
Select Slot

New Key or Card Access Request – Create Key Ring



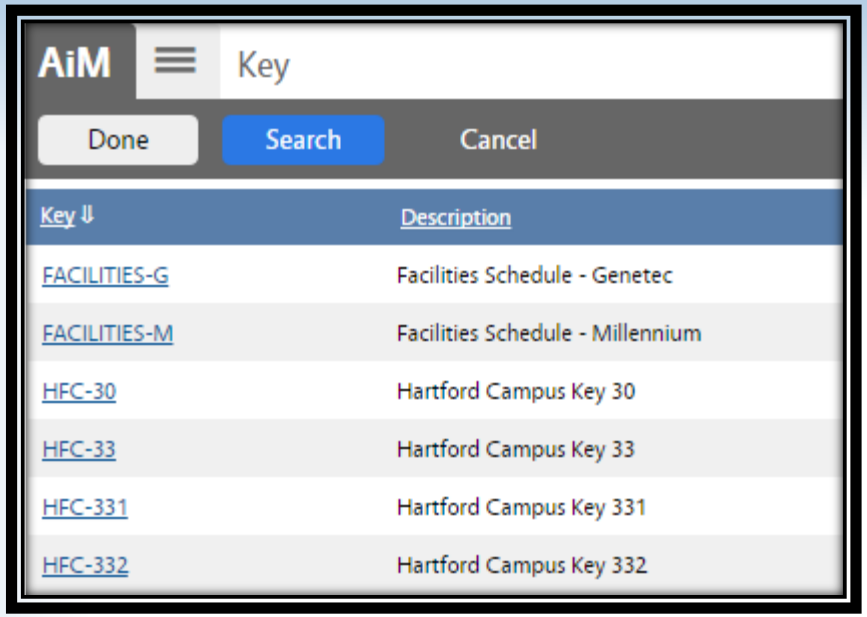
Select ***Add***

New Key or Card Access Request – Create Key Ring



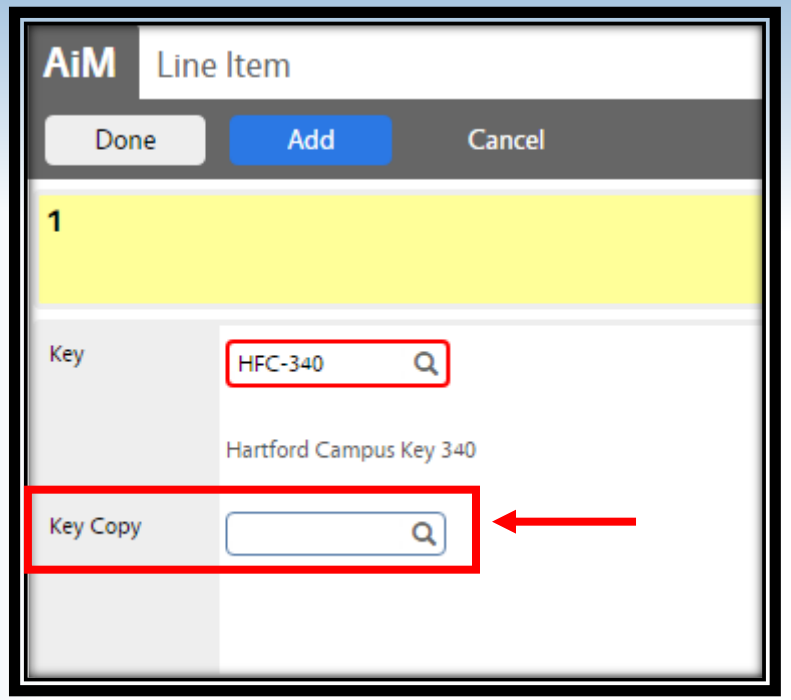
Search Key

New Key or Card Access Request – Create Key Ring



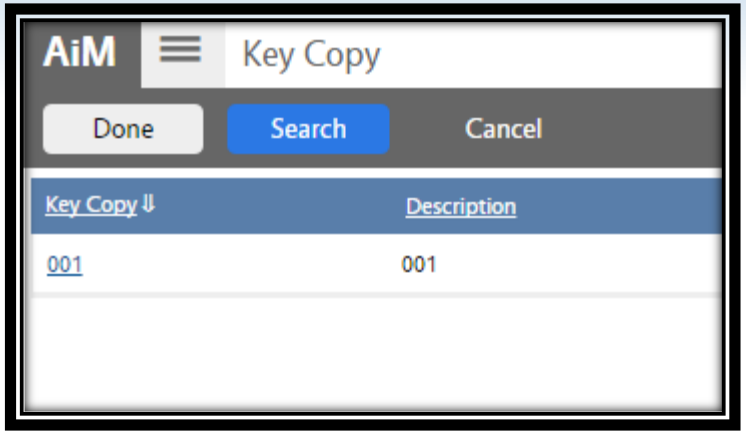
Select Key

New Key or Card Access Request – Create Key Ring



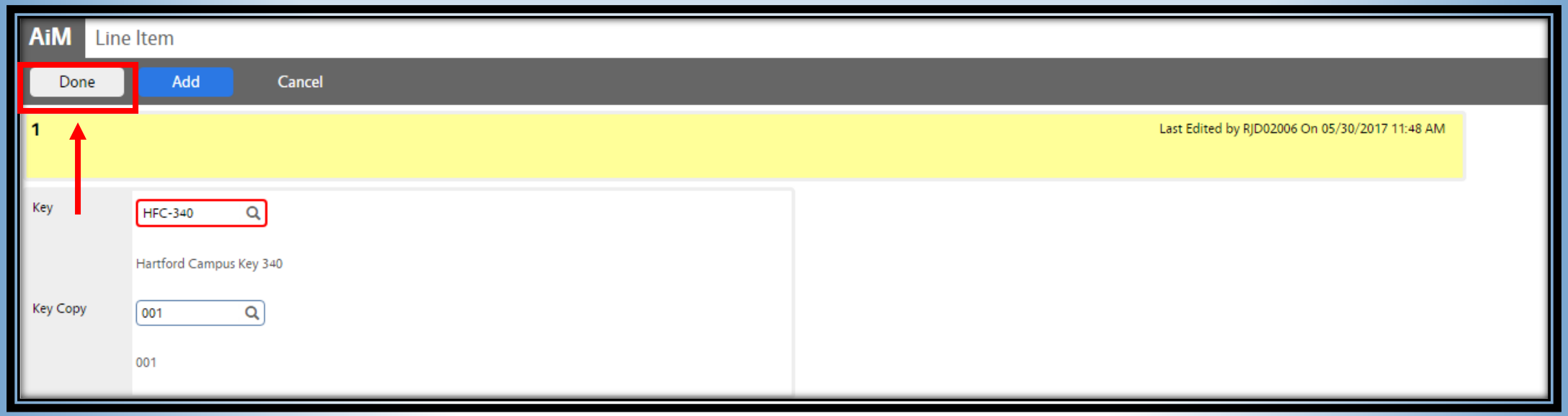
Search Key Copy

New Key or Card Access Request – Create Key Ring



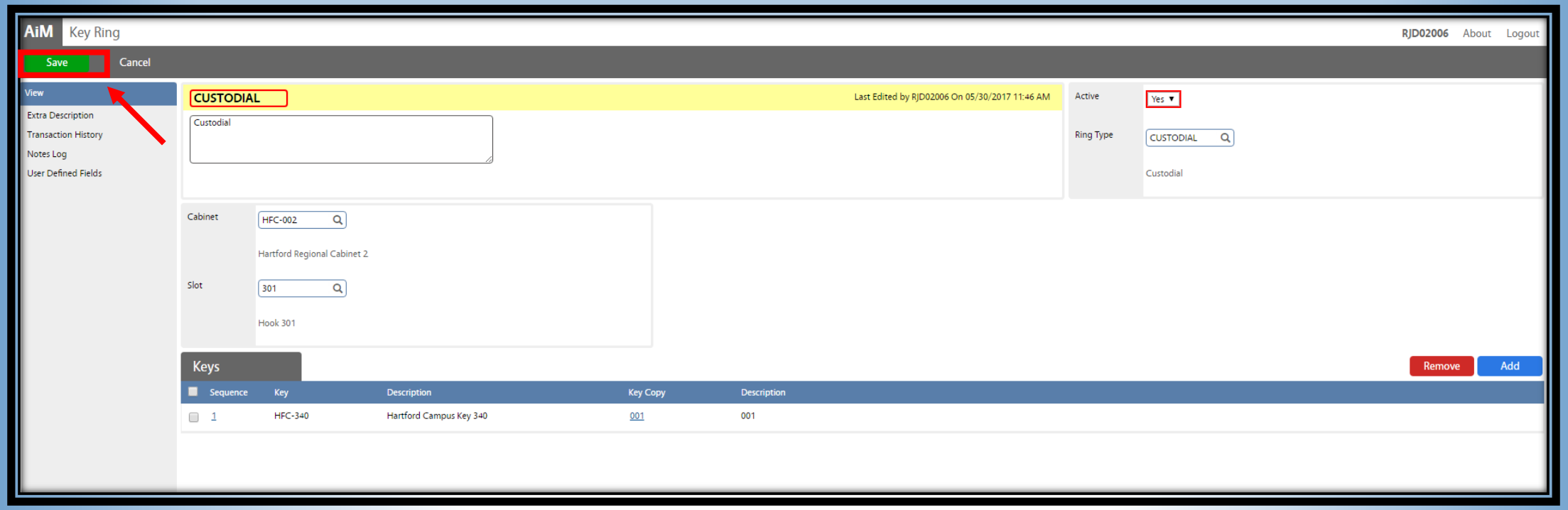
Select Key Copy

New Key or Card Access Request – Create Key Ring



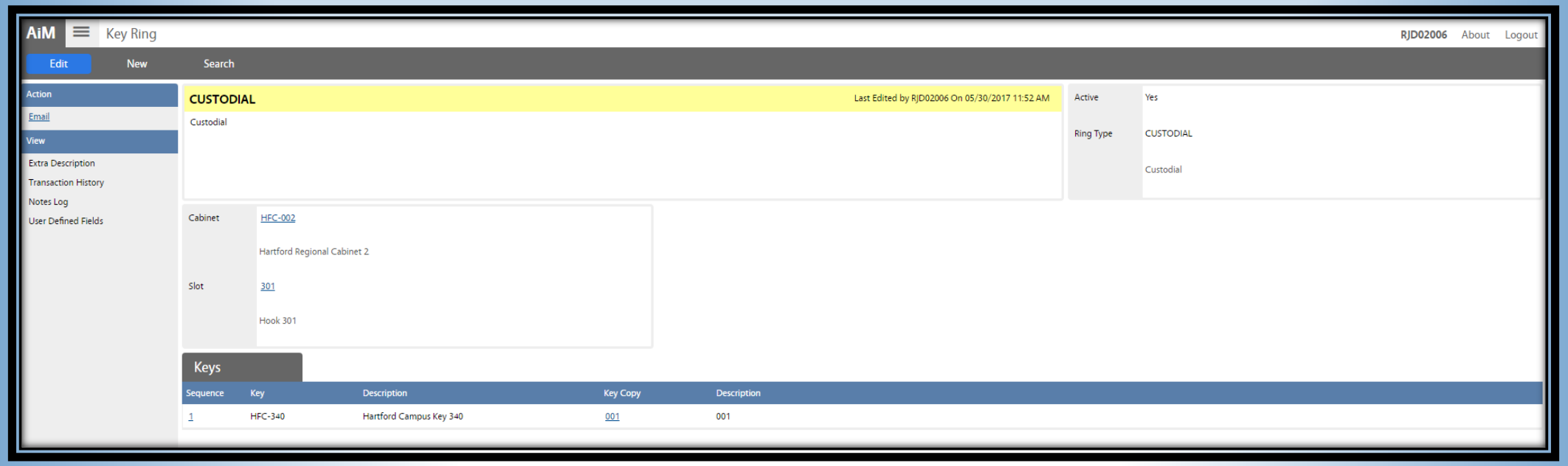
Note: *Add more keys as needed, then click* ***Done***

New Key or Card Access Request – Create Key Ring



Click ***Save***

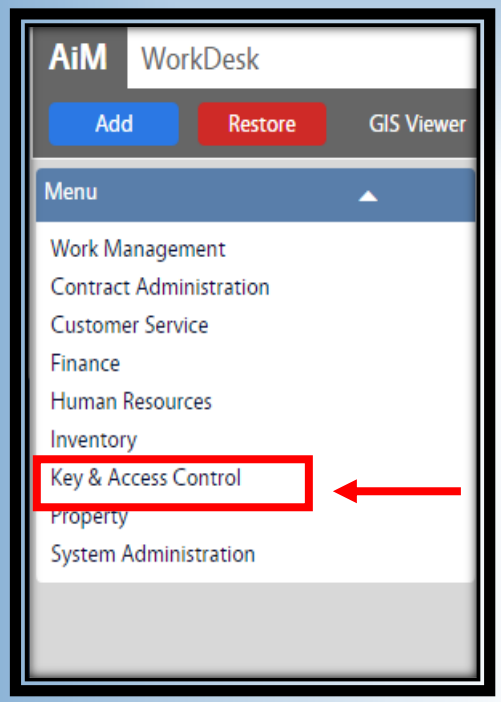
New Key or Card Access Request – Create Key Ring



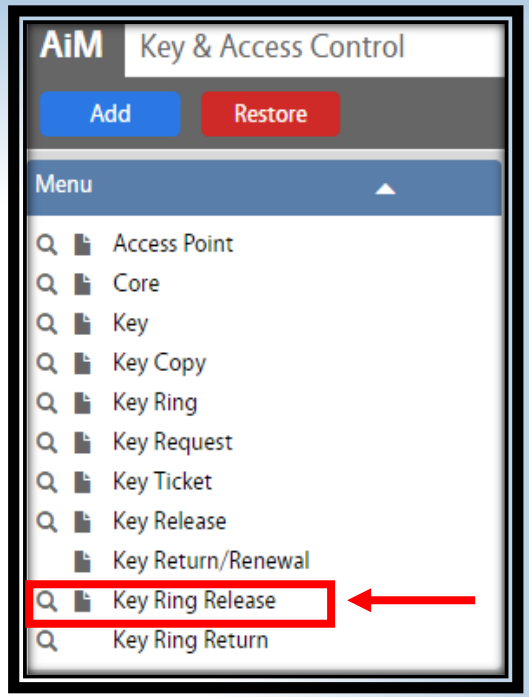
New Key or Card Access Request – Create Key Ring

New Key or Card Access Request

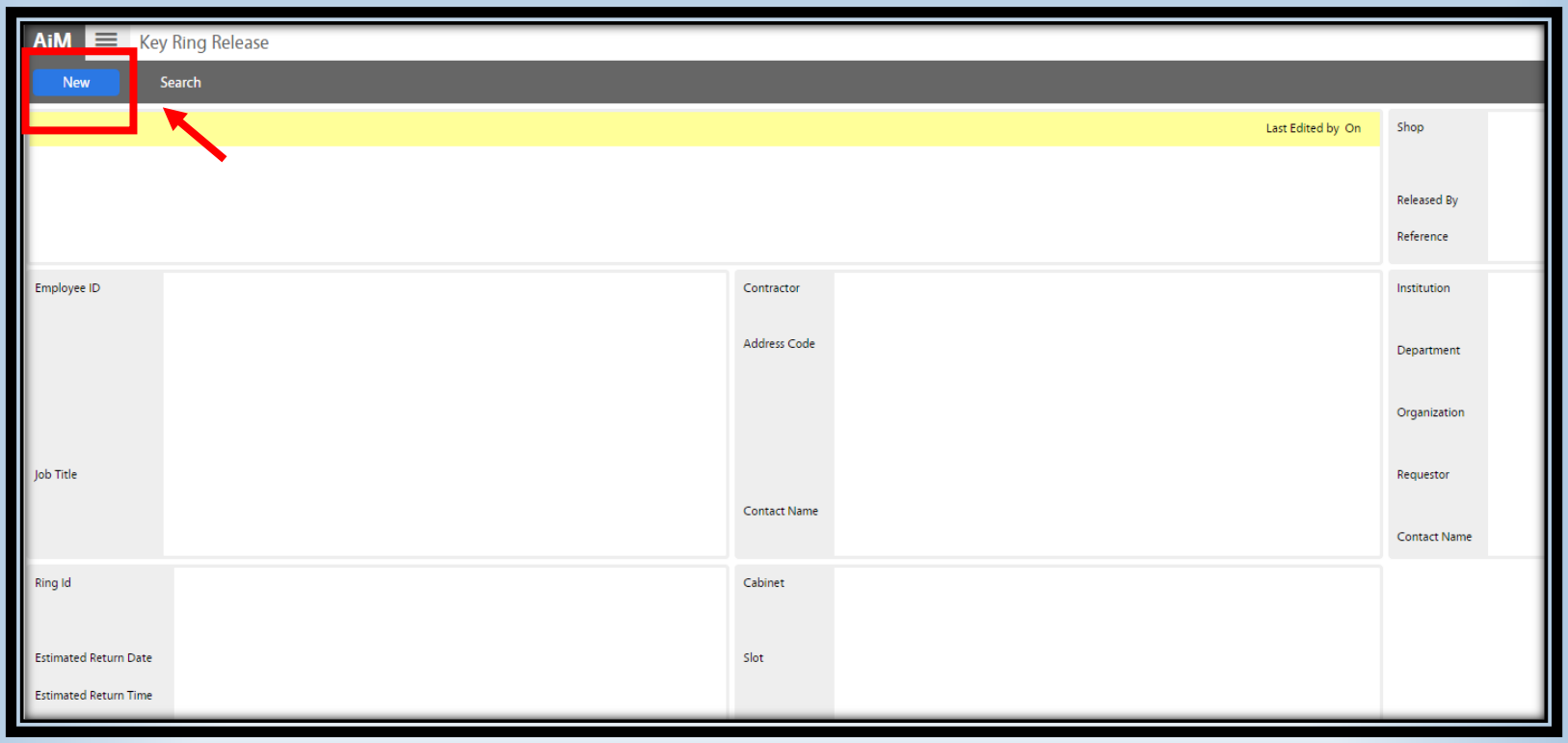
Key Ring Release



On *WorkDesk*, click Key & Access Control, then click Key Ring Release

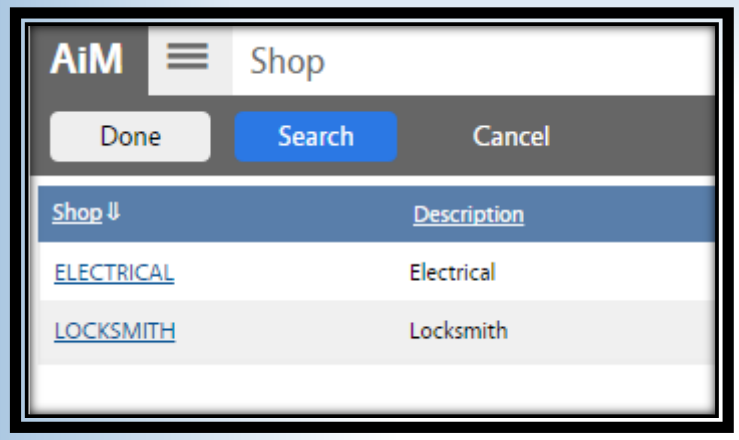


New Key or Card Access Request – Key Ring Release



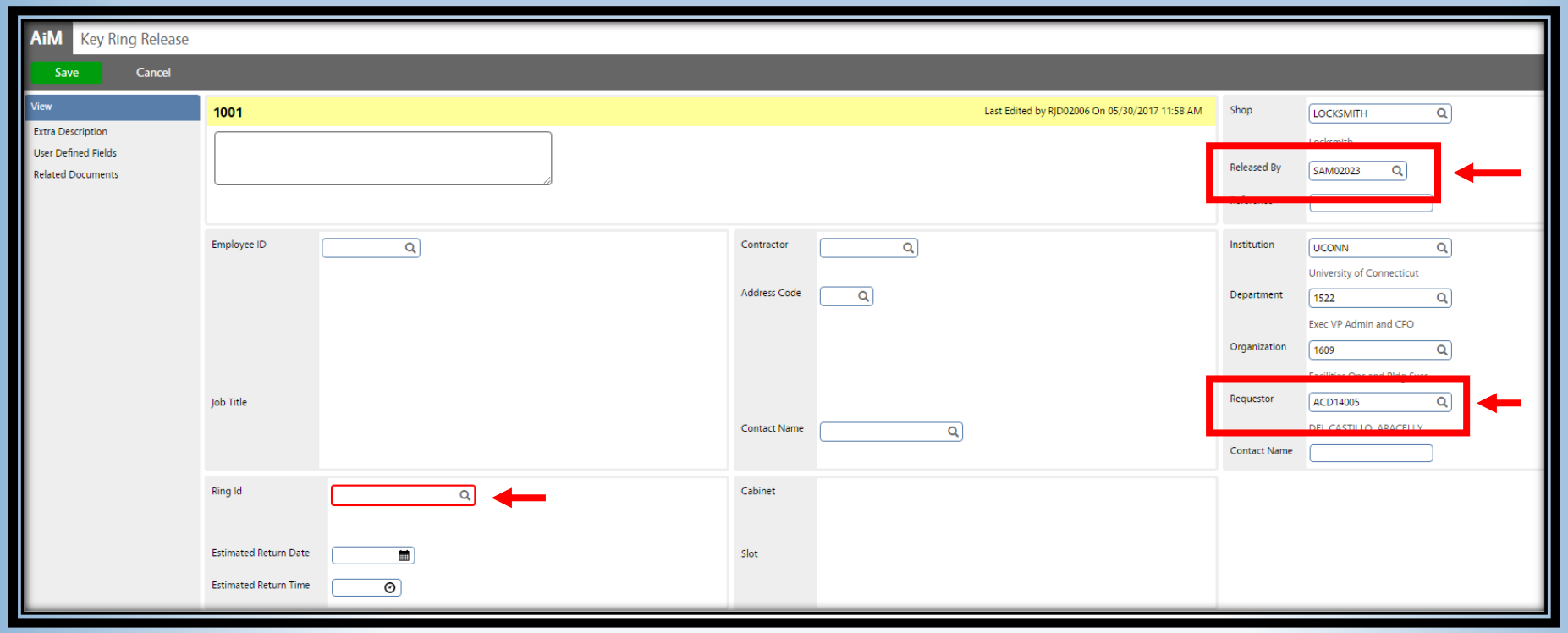
Click ***New***

New Key or Card Access Request – Key Ring Release



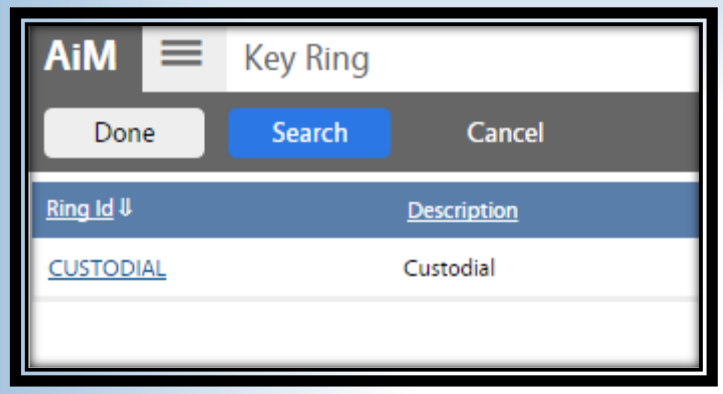
Search/select Locksmith Shop

New Key or Card Access Request – Key Ring Release



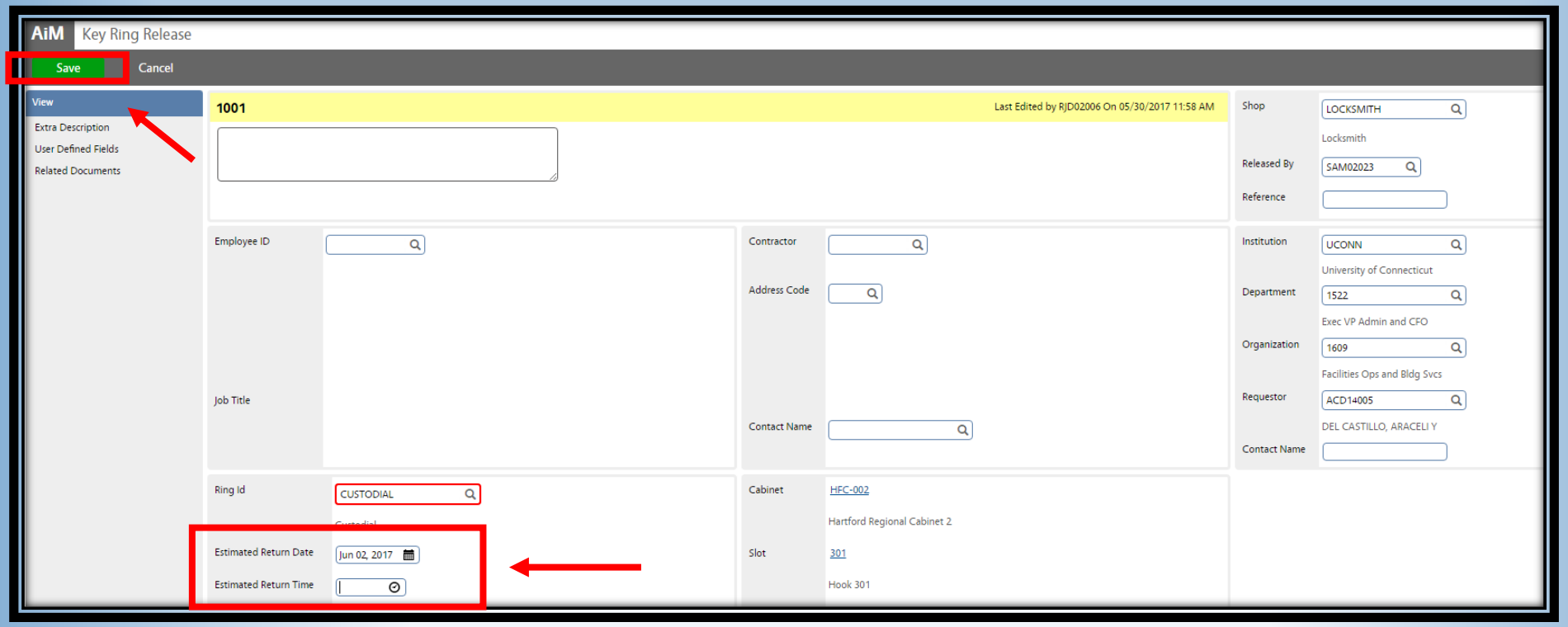
Search/enter Released By and Requestor information
then, search Ring ID field

New Key or Card Access Request – Key Ring Release



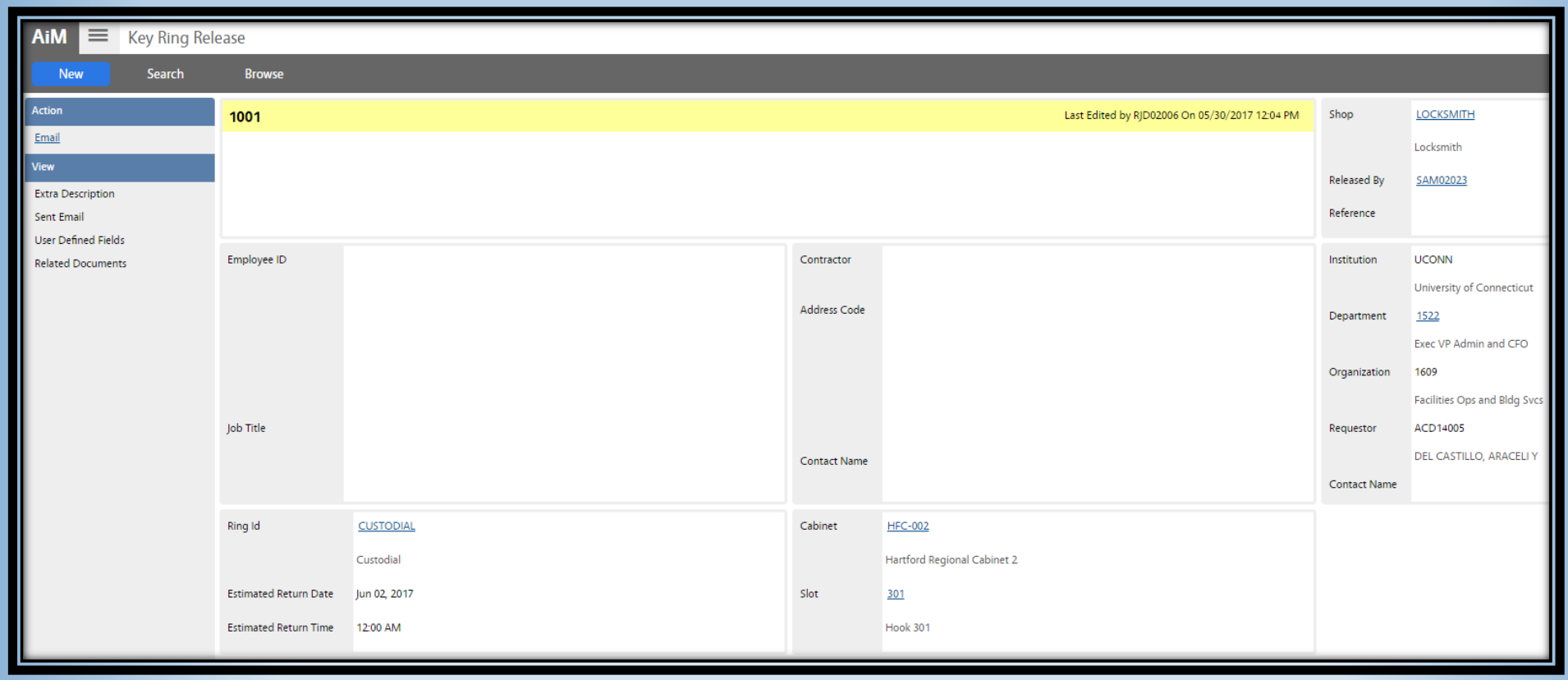
Select Locksmith Key Ring ID

New Key or Card Access Request – Key Ring Release



Enter Estimated Return Date and time,
then click ***Save***

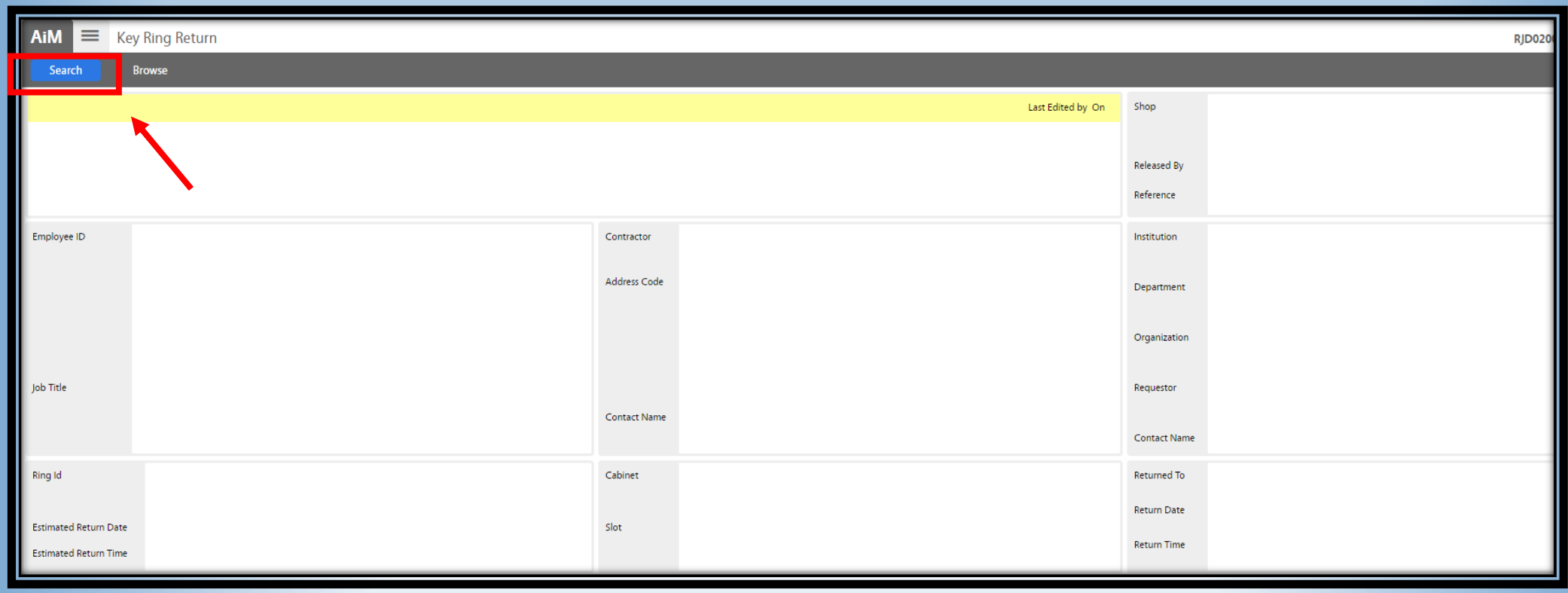
New Key or Card Access Request – Key Ring Release



New Key or Card Access Request – Key Ring Release

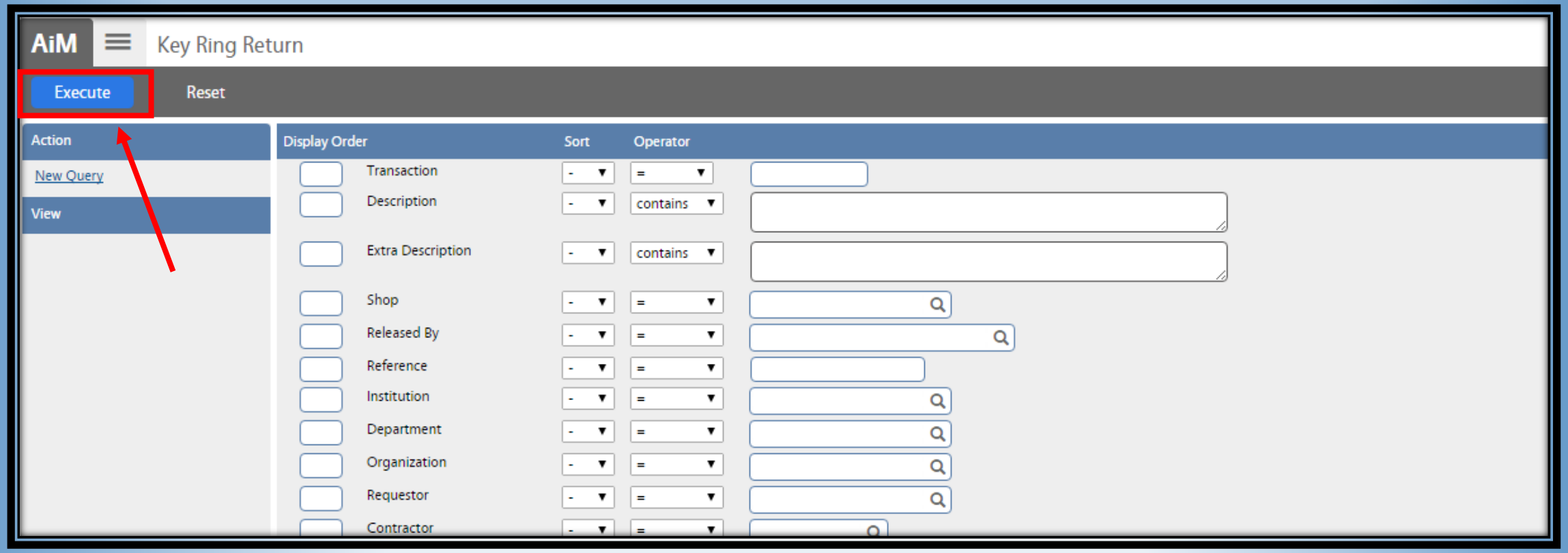
New Key or Card Access Request

Key Ring Return



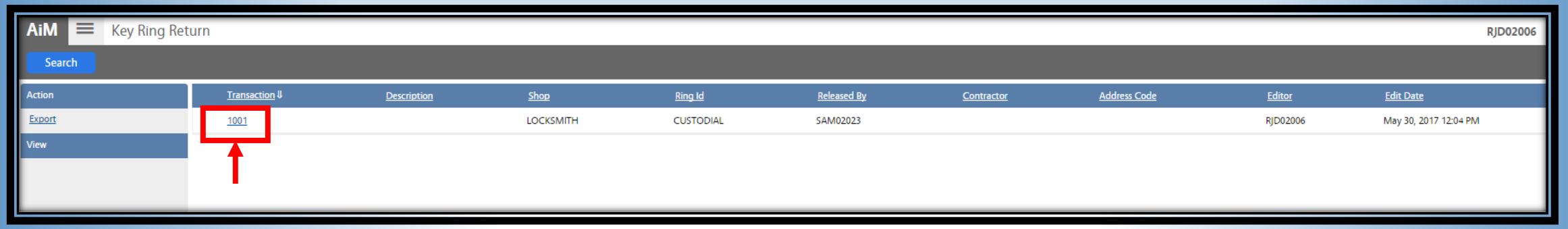
Click ***Search***

New Key or Card Access Request – Key Ring Return



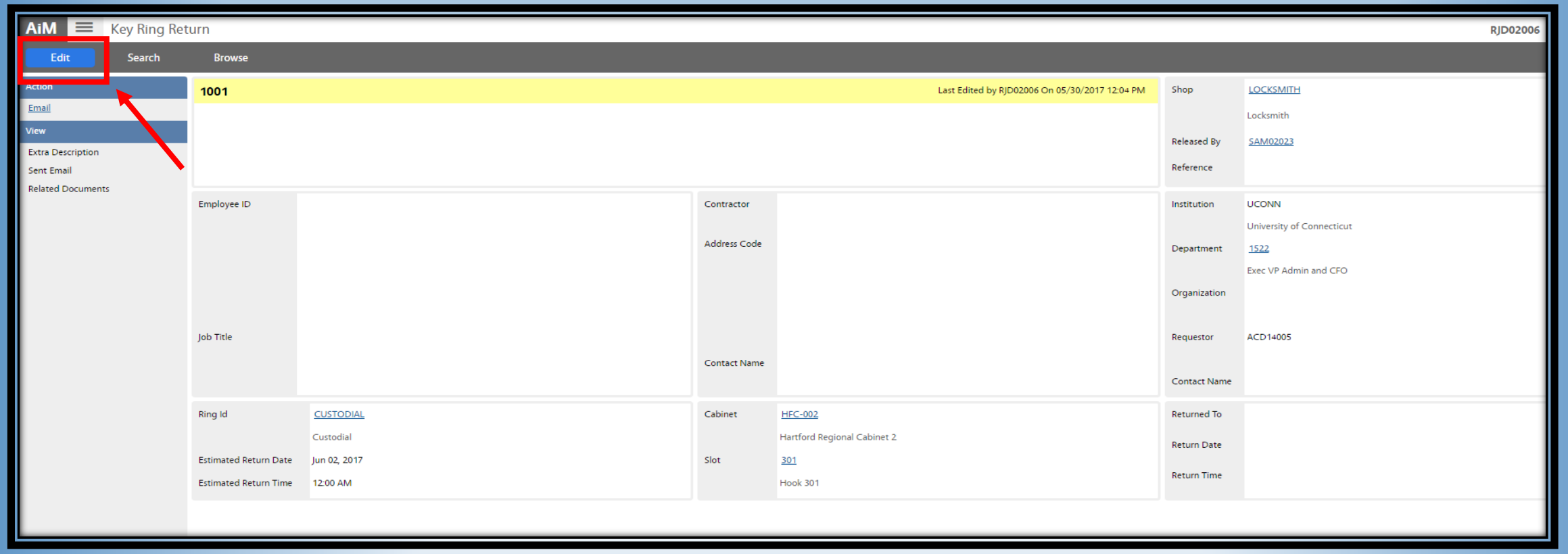
Enter search criteria, then click ***Execute***

New Key or Card Access Request – Key Ring Return



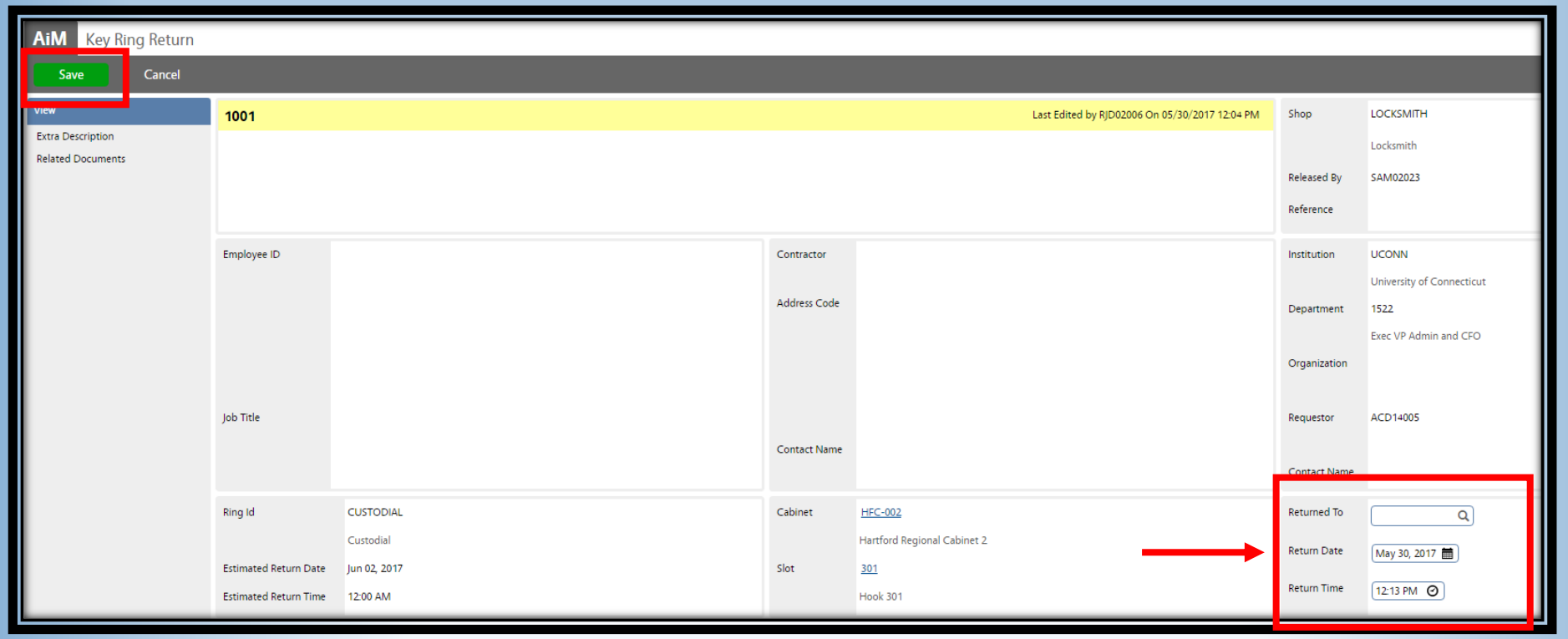
Select transaction number

New Key or Card Access Request – Key Ring Return



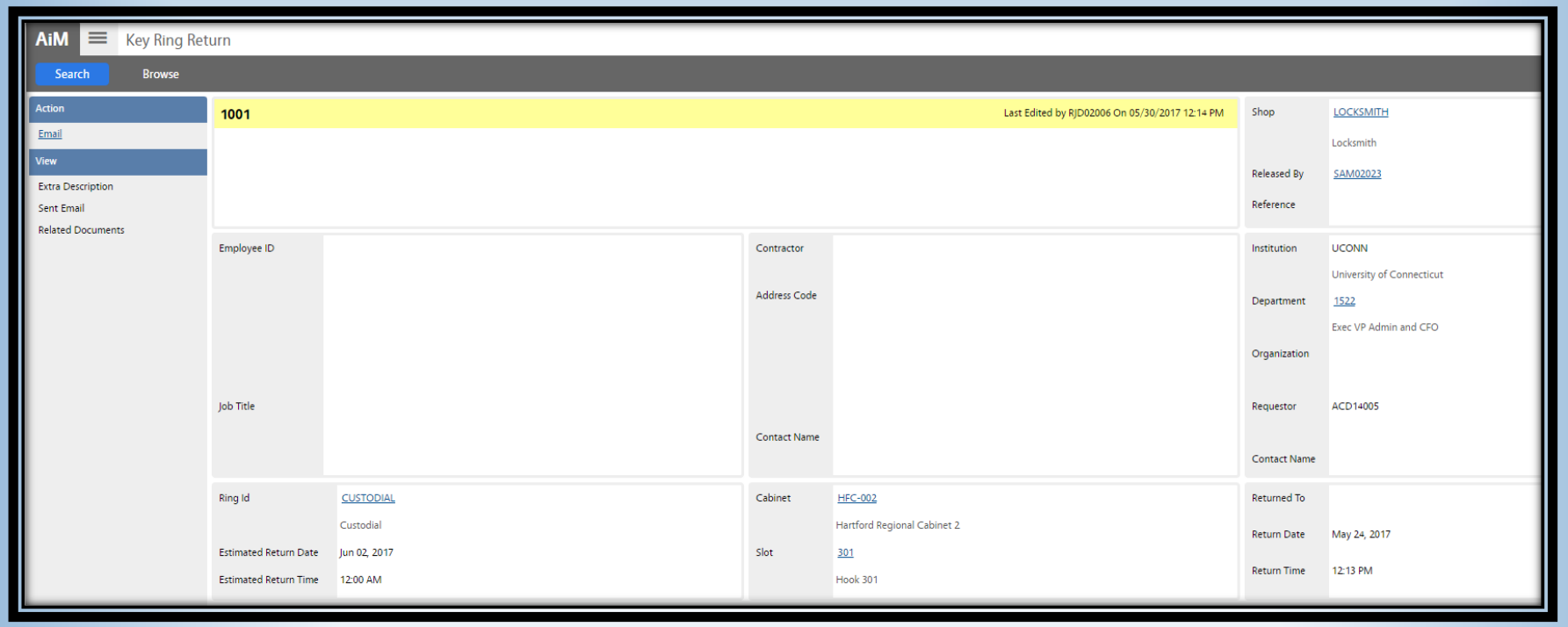
Click ***Edit***

New Key or Card Access Request – Key Ring Return



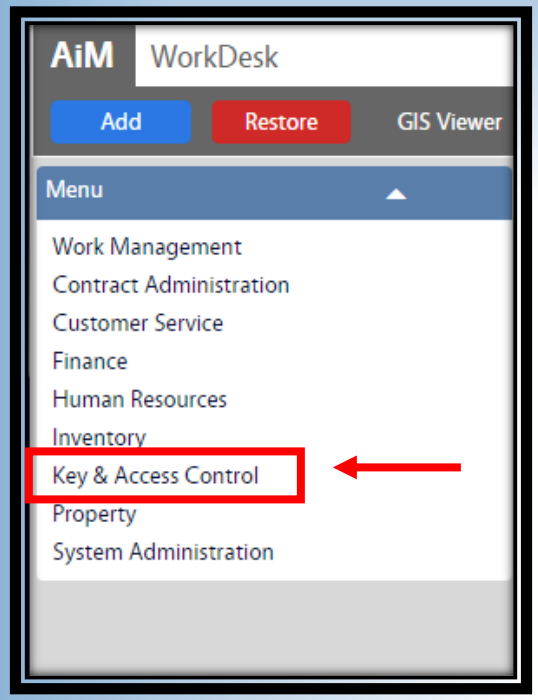
Search Return To and enter Return Date and Time, then click ***Save***

New Key or Card Access Request – Key Ring Return

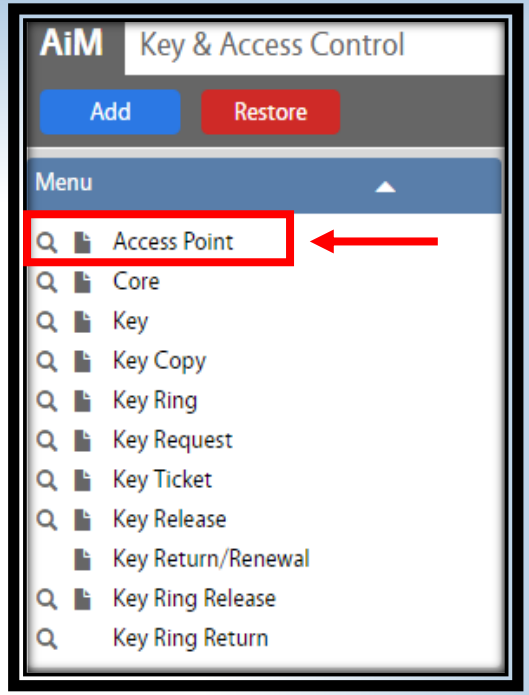


New Key or Card Access Request – Key Ring Return

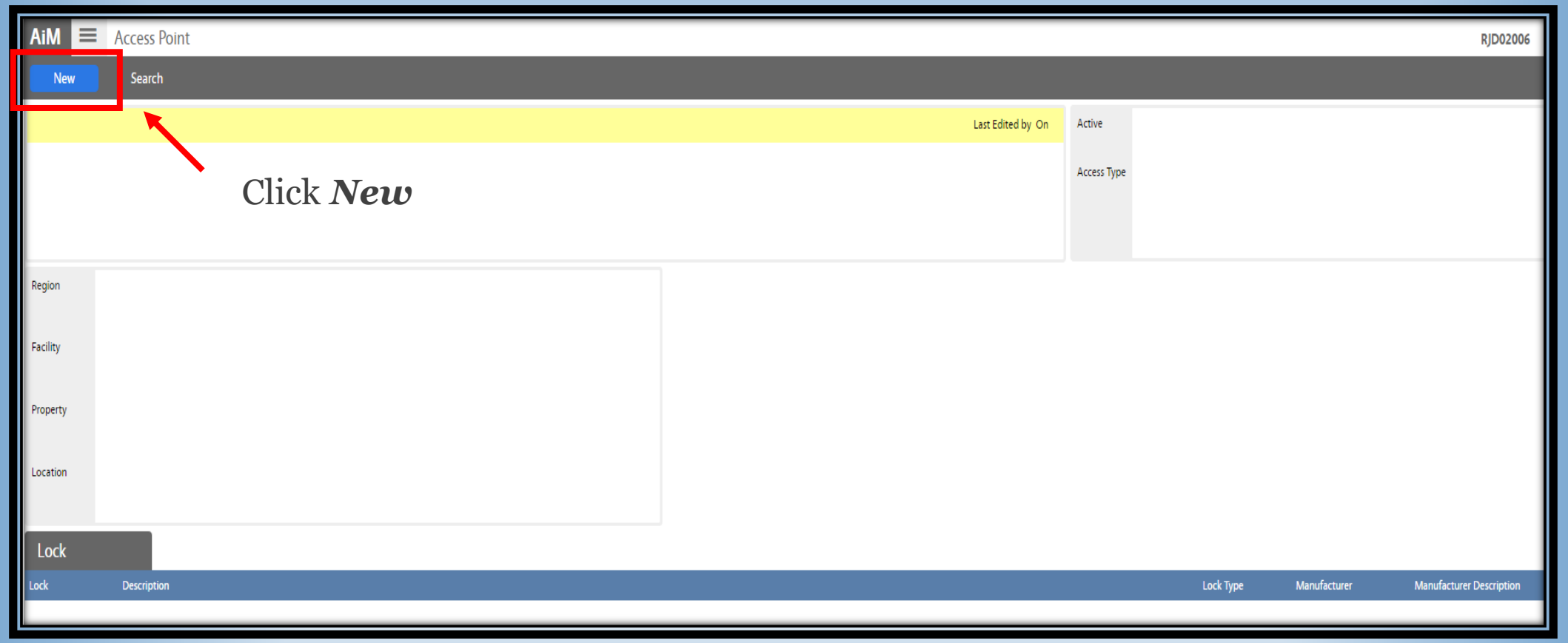
Add Access Points



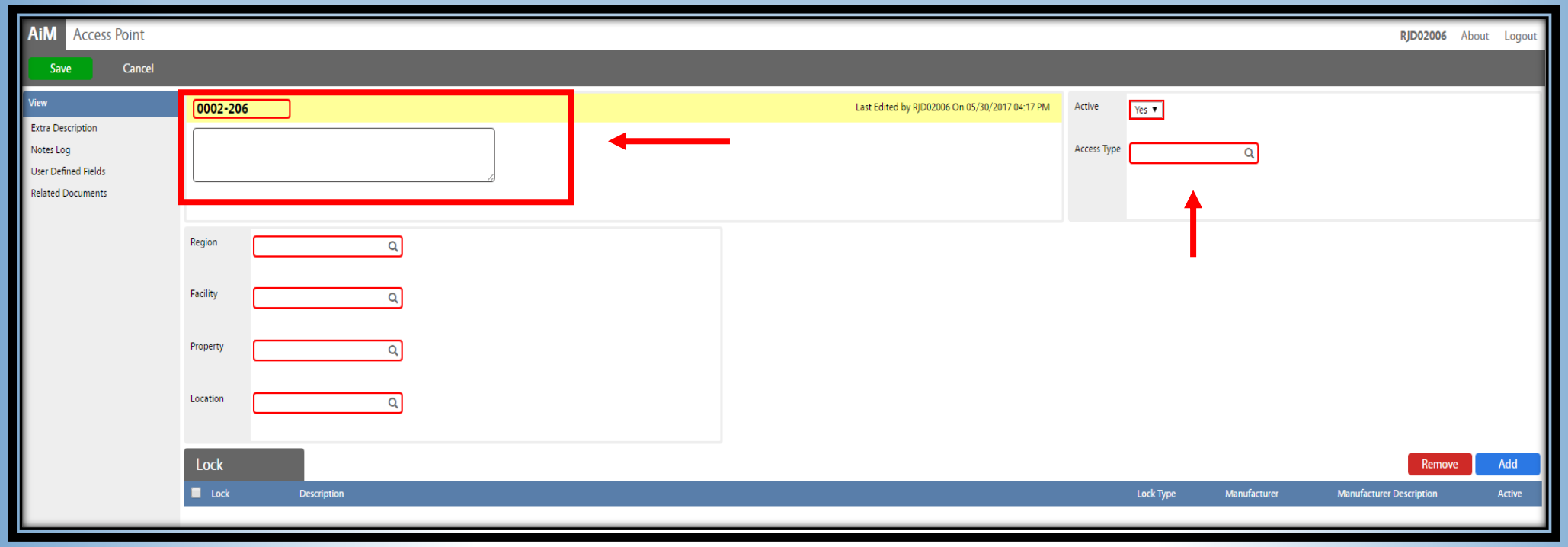
On *WorkDesk*, click Key & Access Control, then click Access Point



Add Access Points

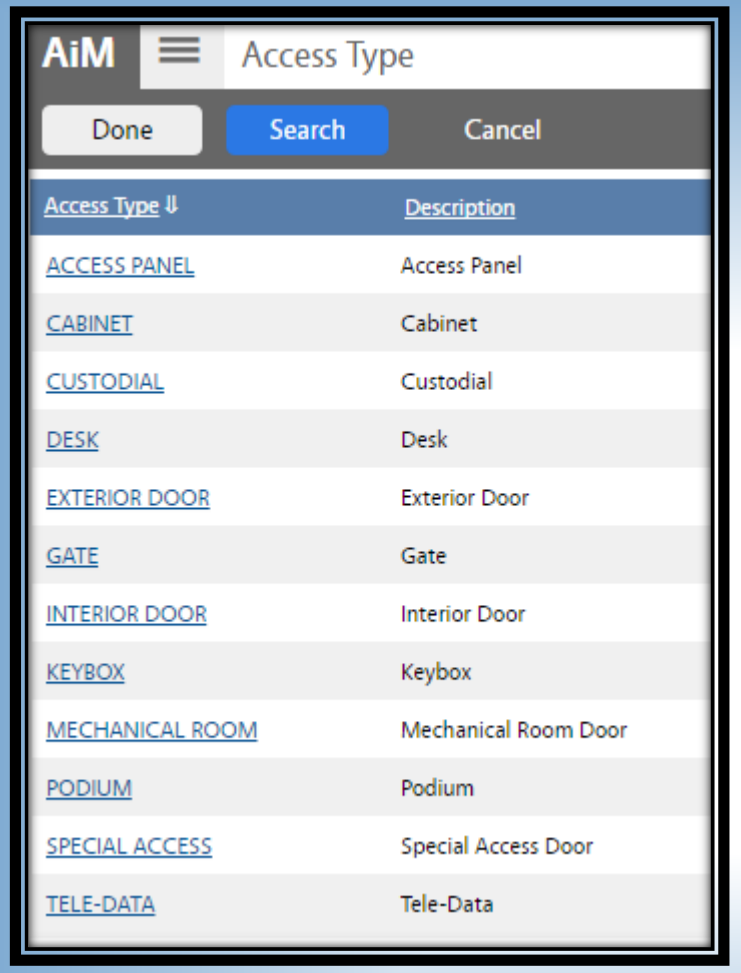


Add Access Points



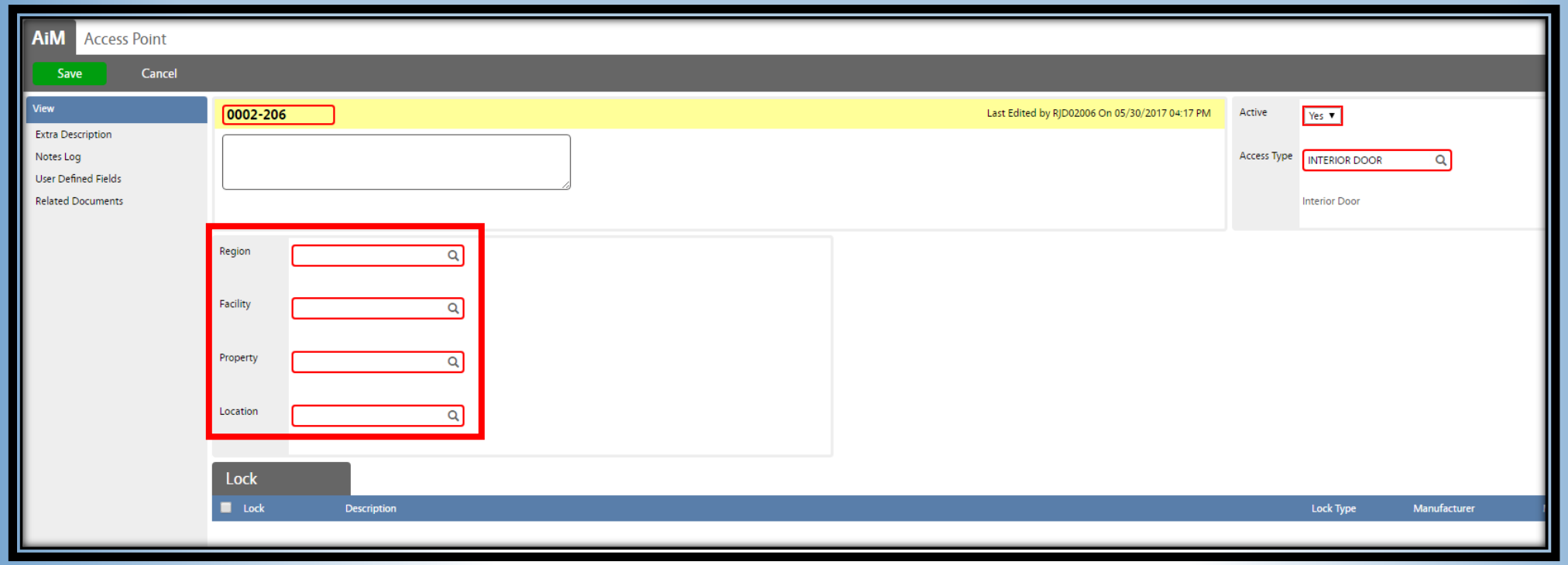
Enter Access Point, then search Access Type

Add Access Points



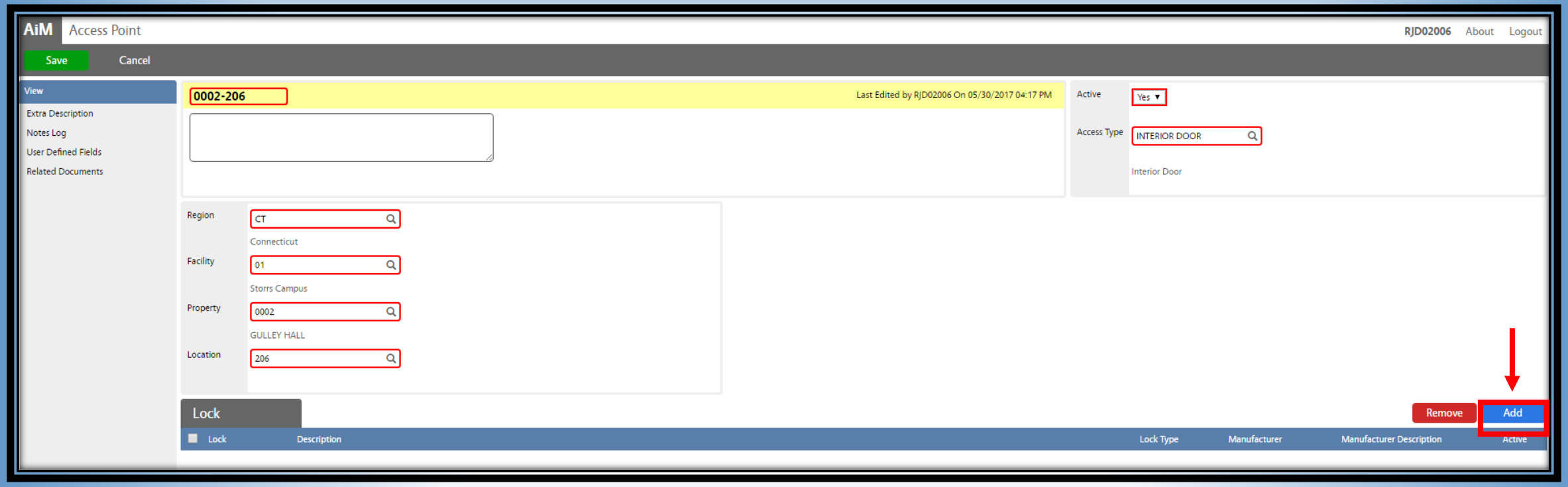
Select Access Type

Add Access Points



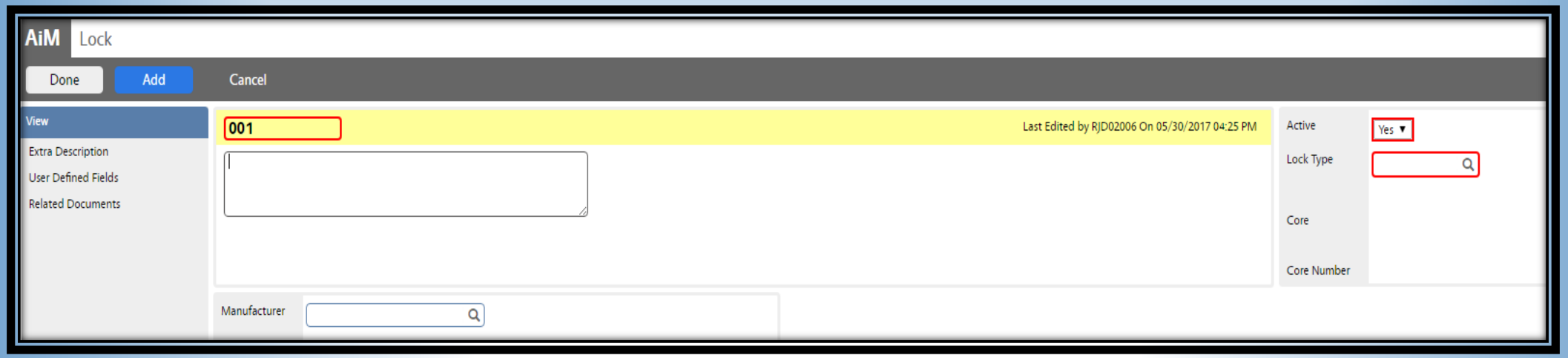
Search location information

Add Access Points



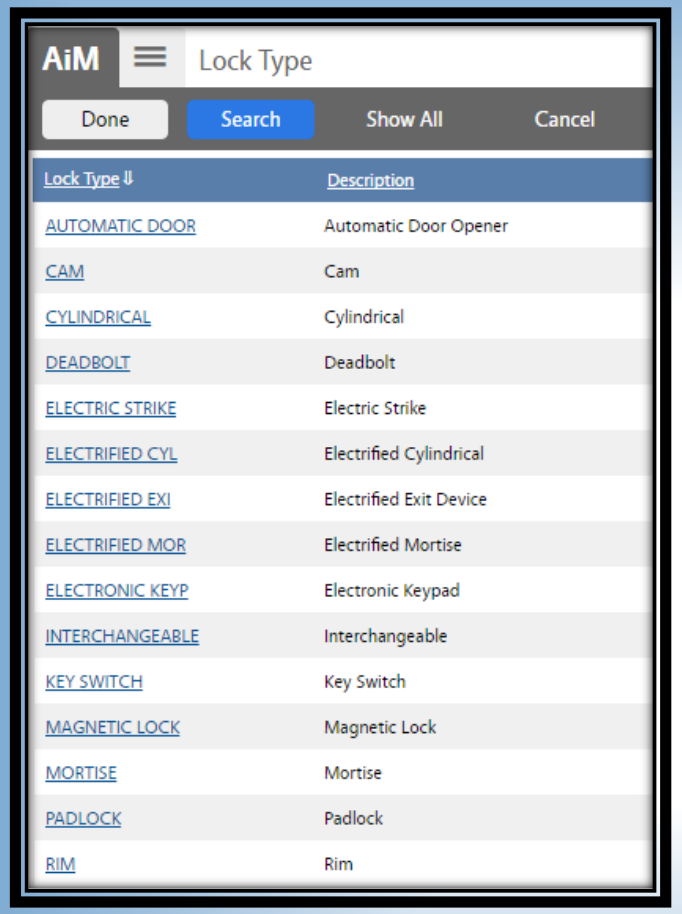
Click ***Add***

Add Access Points



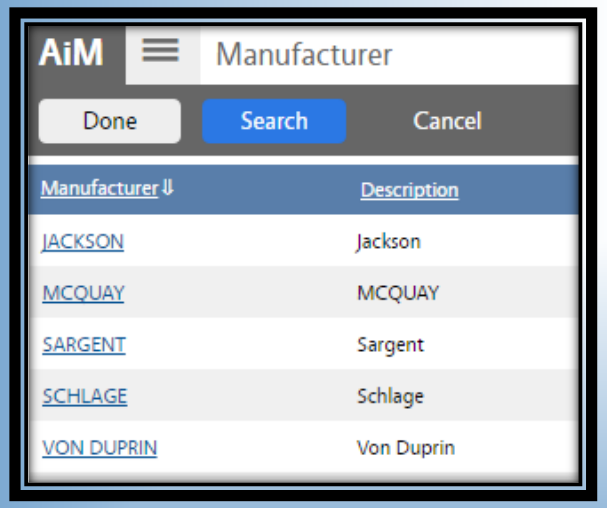
Enter Lock ID & description, then search Lock Type

Add Access Points



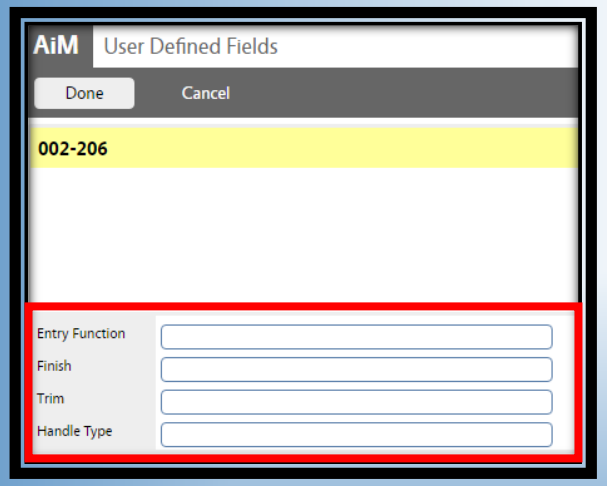
Select Lock Type

Add Access Points



Search Manufacturer

Add Access Points

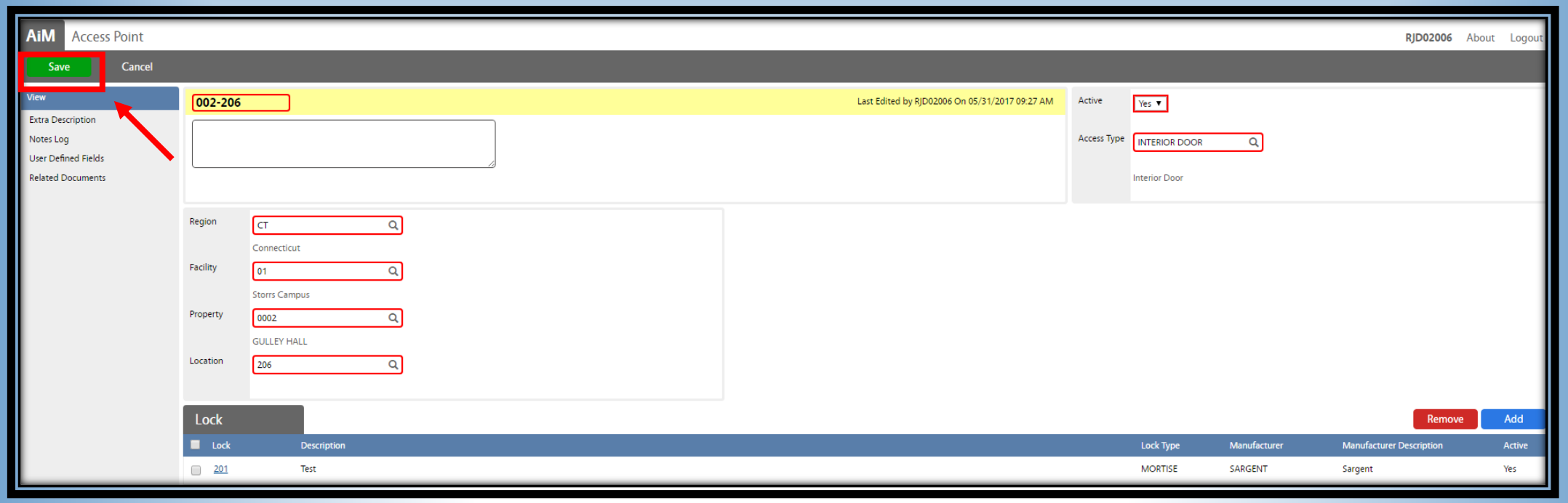


Click User Defined Fields and enter Entry Function, Finish, Trim and Handle Type information, then click ***Done***

Add Access Points

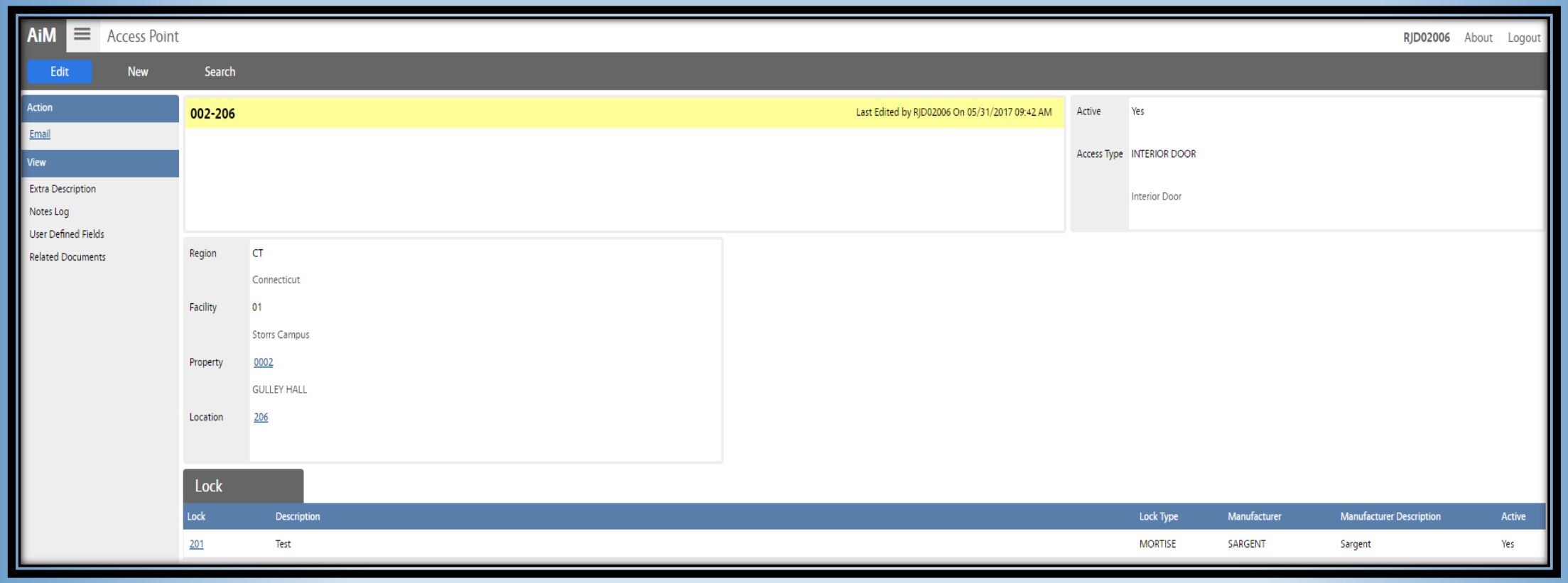
Click ***Done***

Add Access Points



Click ***Save***

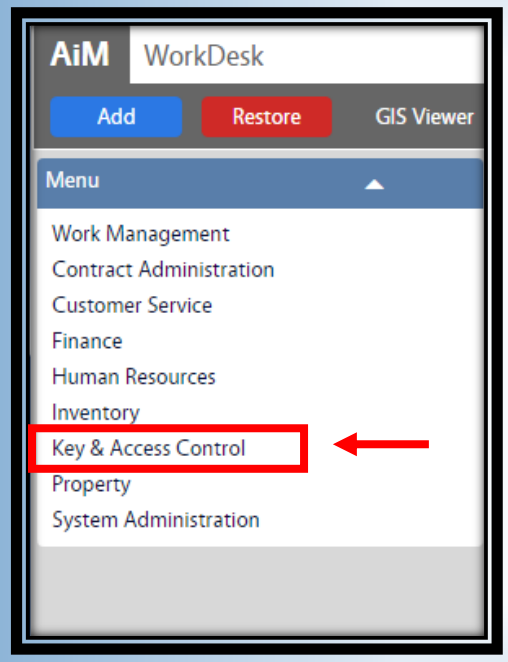
Add Access Points



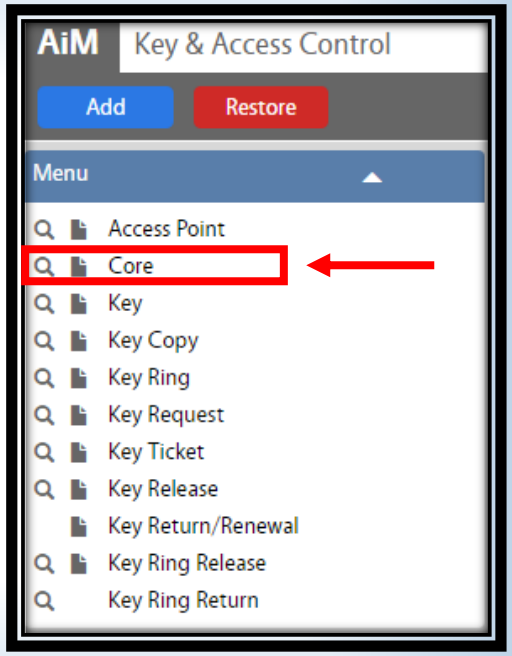
Add Access Points

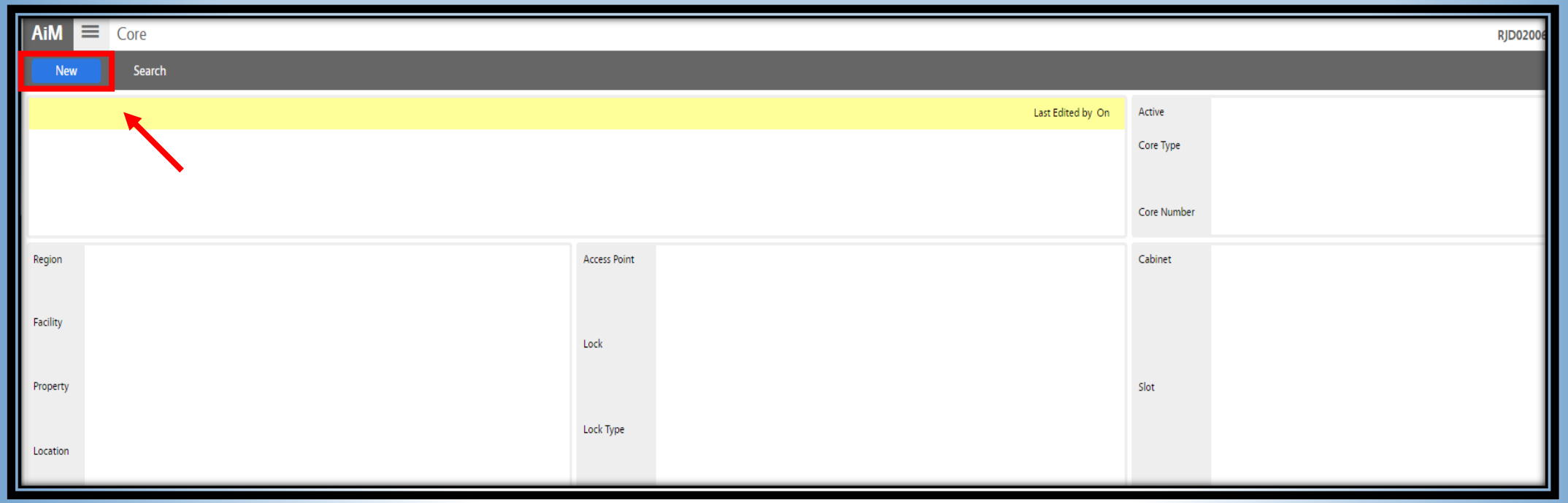
Add Cores

Add Access Points



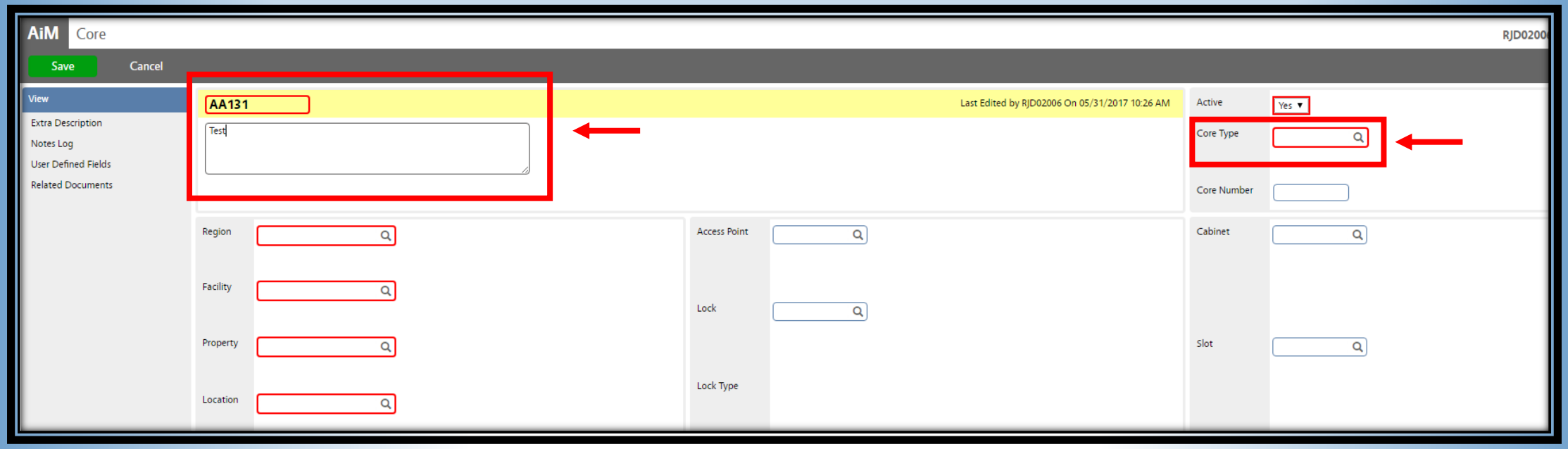
On *WorkDesk*, click Key & Access Control, then click Core





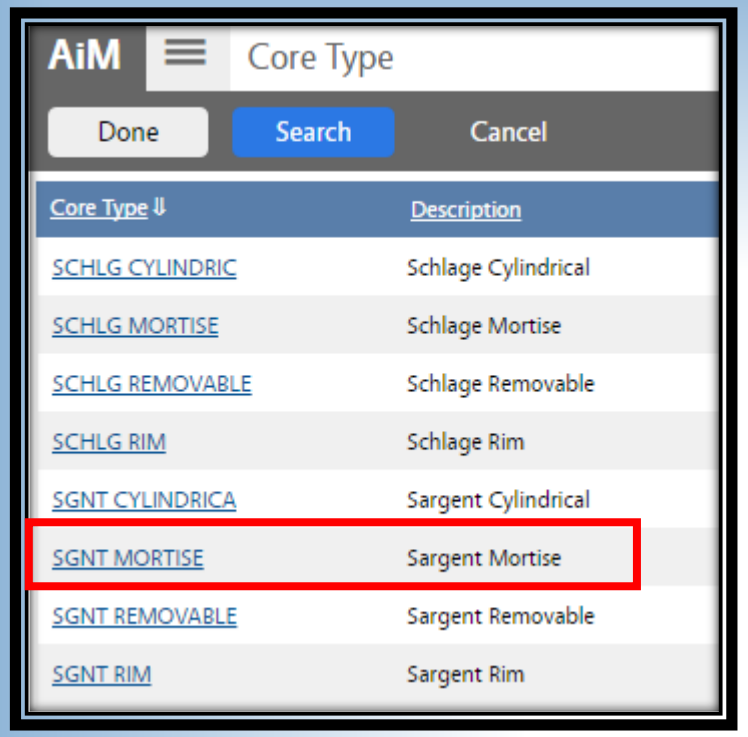
Click ***New***

Add Cores



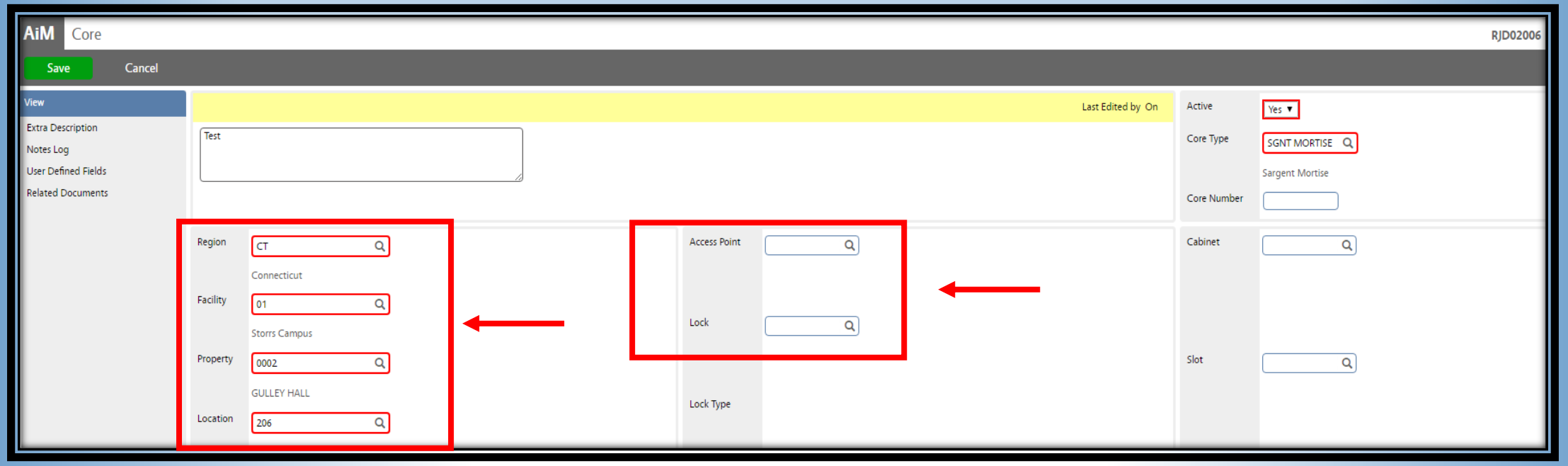
Enter Core label and description, then search Core Type

Add Cores



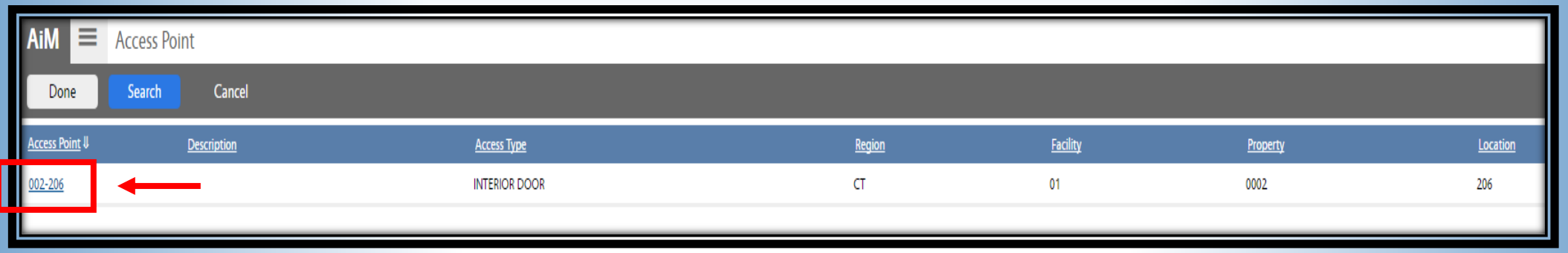
Select Core Type

Add Cores



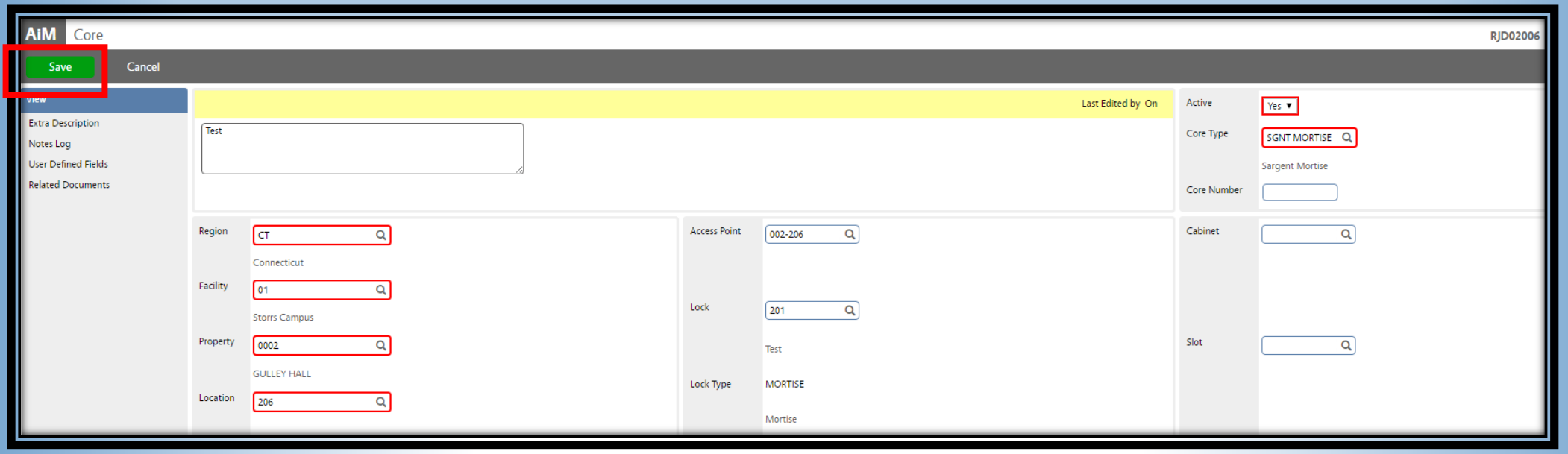
Search Location information, then search Access Point and Lock

Add Cores



Select Access Point

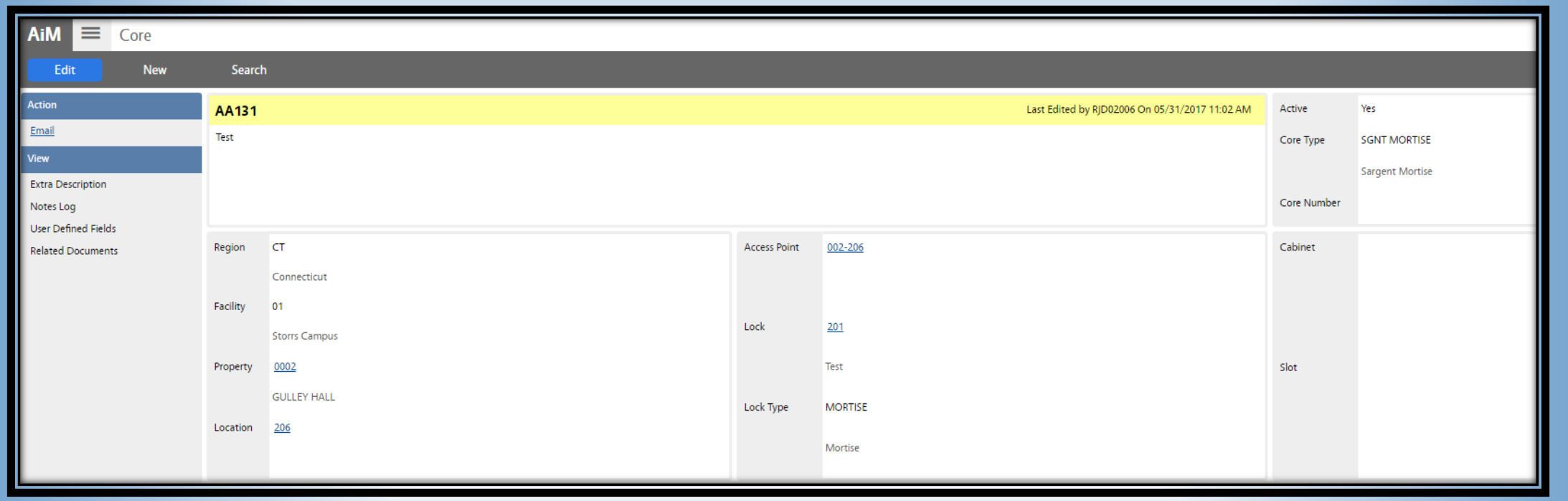
Add Cores



Note: Lock information is automatically populated

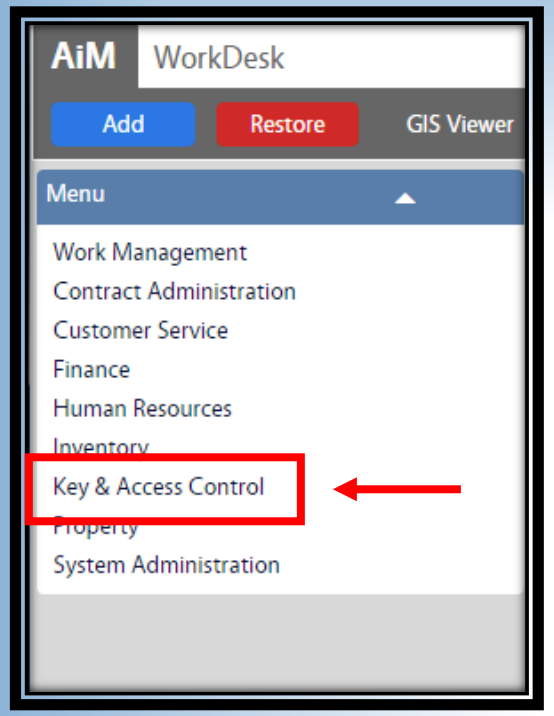
Click ***Save***

Add Cores

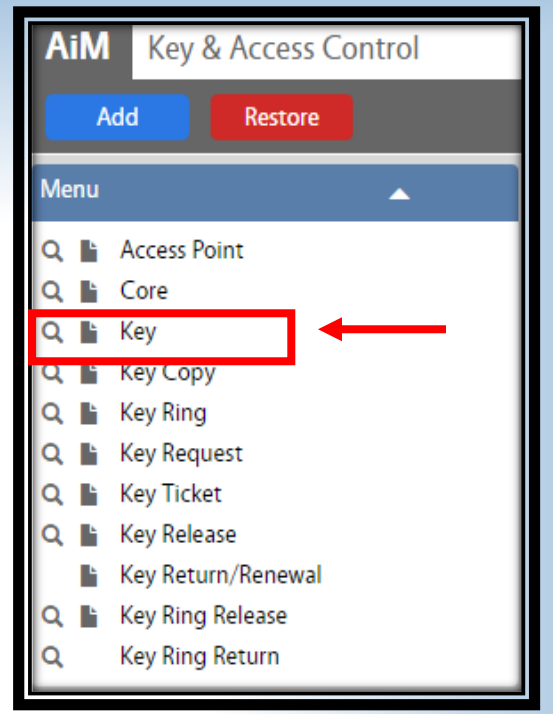

AiM
Core
Edit
New
Search
Action
Email
View
Extra Description
Notes Log
User Defined Fields
Related Documents
AA131
Last Edited by RJD02006 On 05/31/2017 11:02 AM
Test
Active
Yes
Core Type
SGNT MORTISE
Sargent Mortise
Core Number
Region
CT
Connecticut
Facility
01
Storrs Campus
Property
0002
GULLEY HALL
Location
206
Access Point
002-206
Lock
201
Test
Lock Type
MORTISE
Mortise
Cabinet
Slot

Add Cores

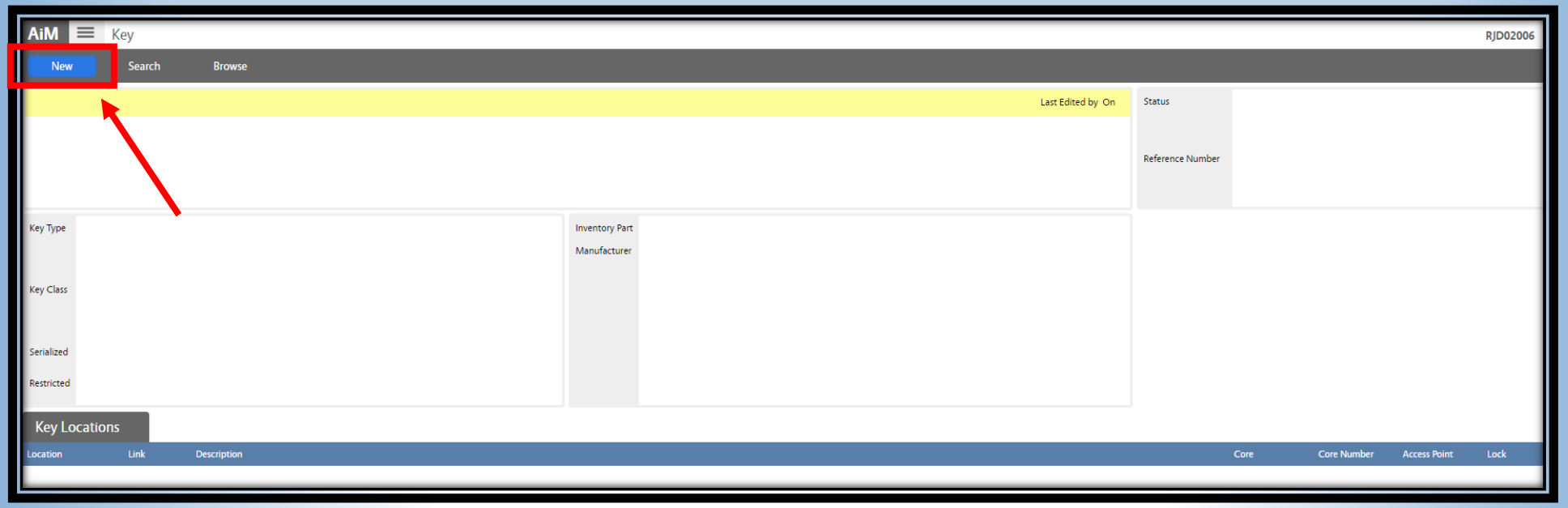
Add New Key



On *WorkDesk*, click Key & Access Control, then click Key

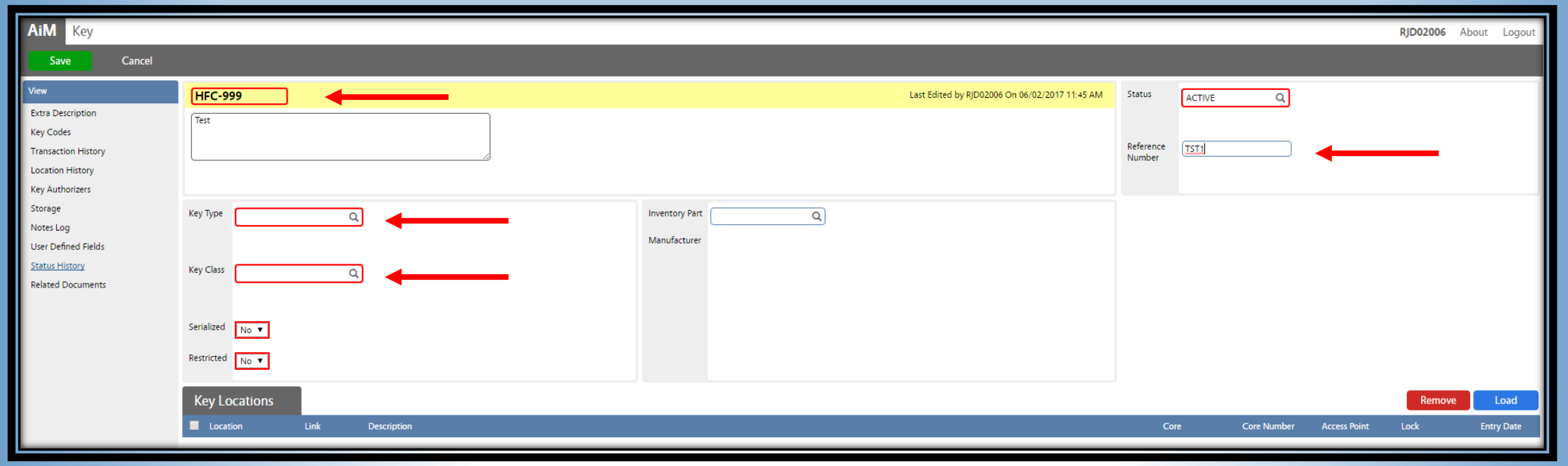


Add New Key



Click ***New***

Add New Key

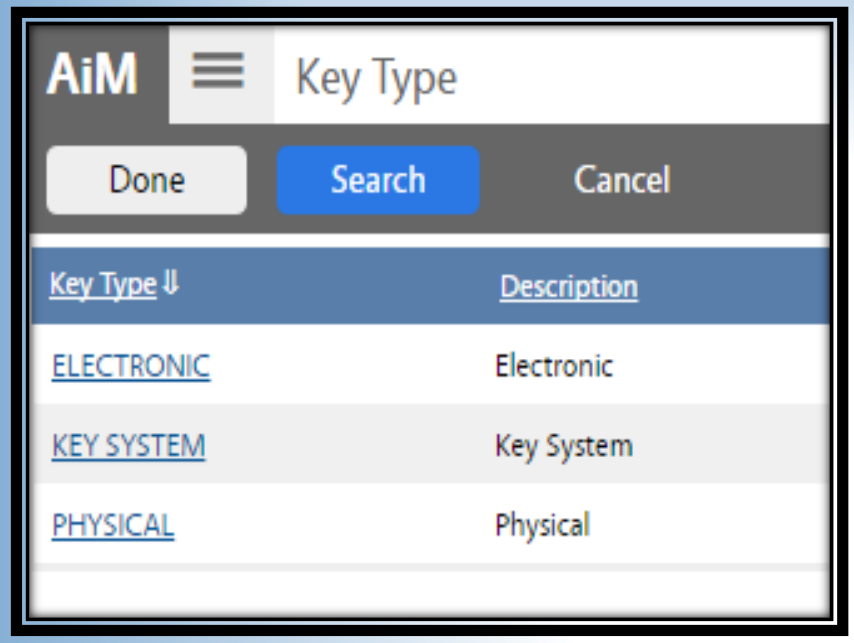


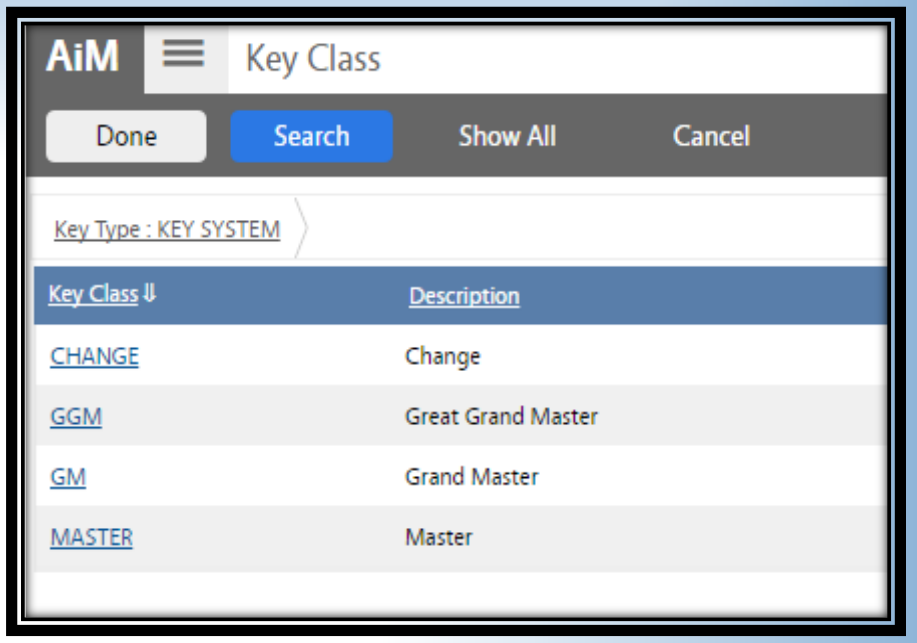
Enter Key ID, Description, Reference Number , then search Key Type and Class

Determine if Serialized and/or Restricted

Note: Status is Active by default

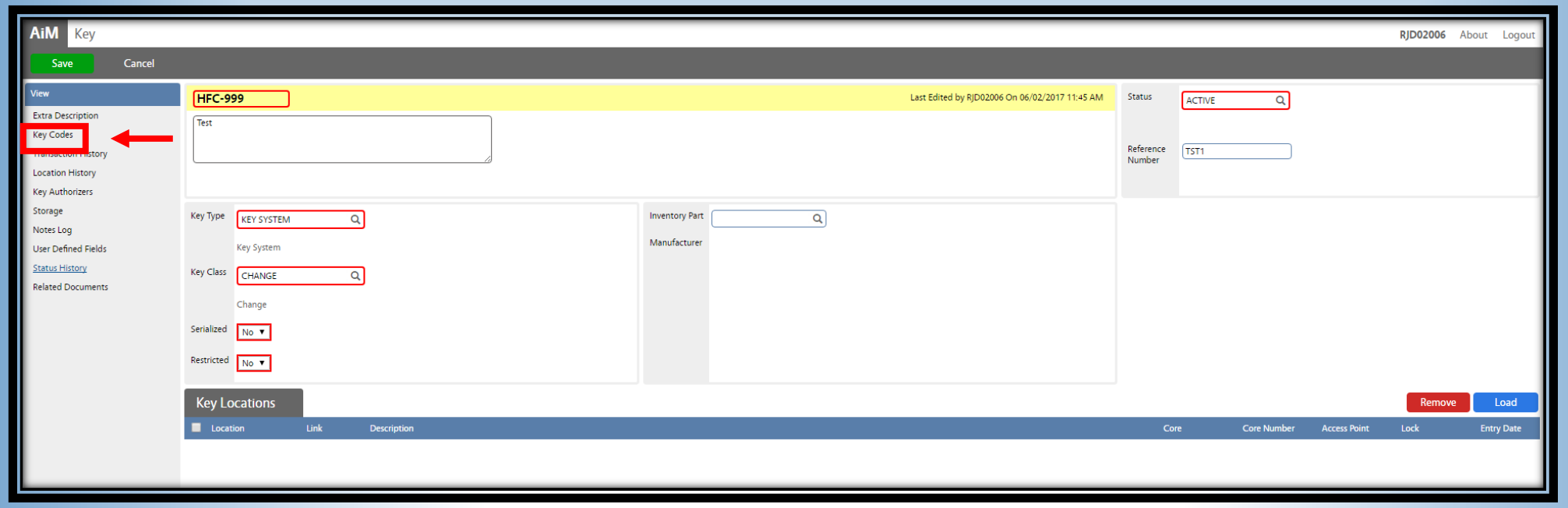
Add New Key





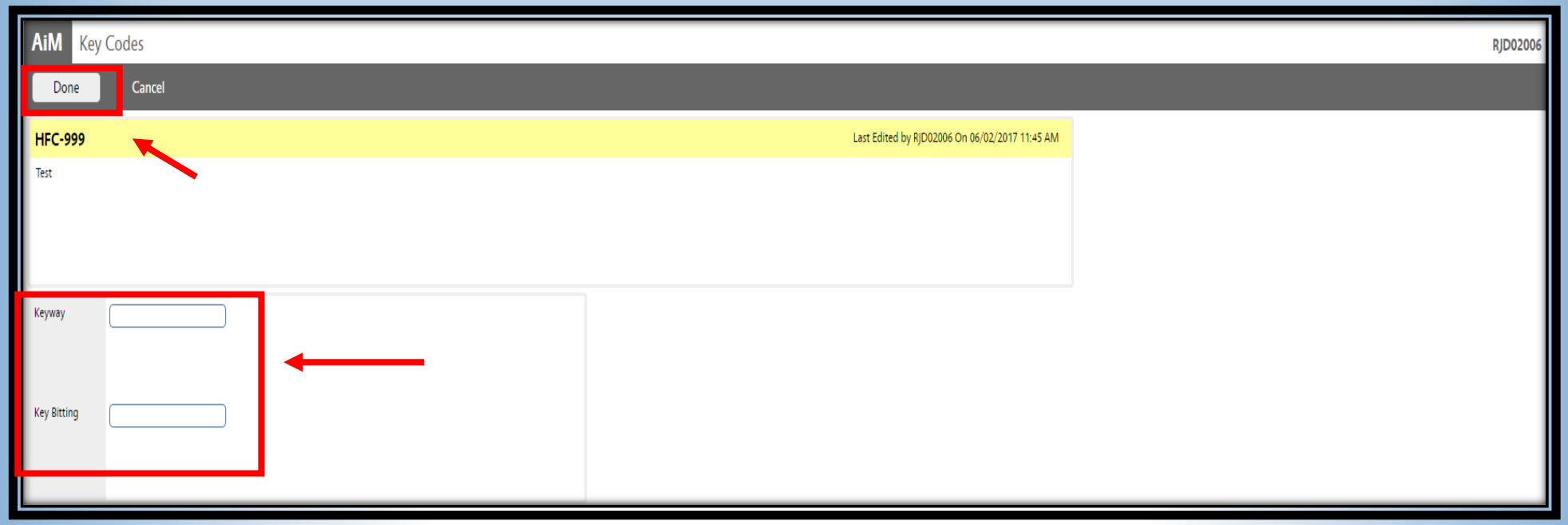
Select Key Type and Key Class

Add New Key



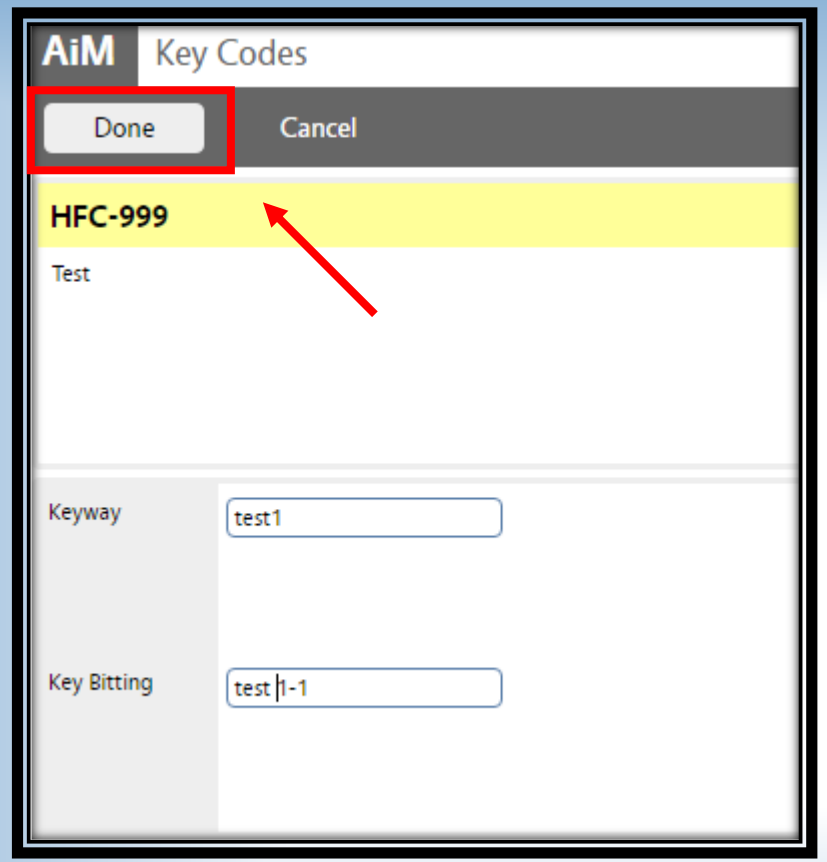
Click *Key Codes* link

Add New Key



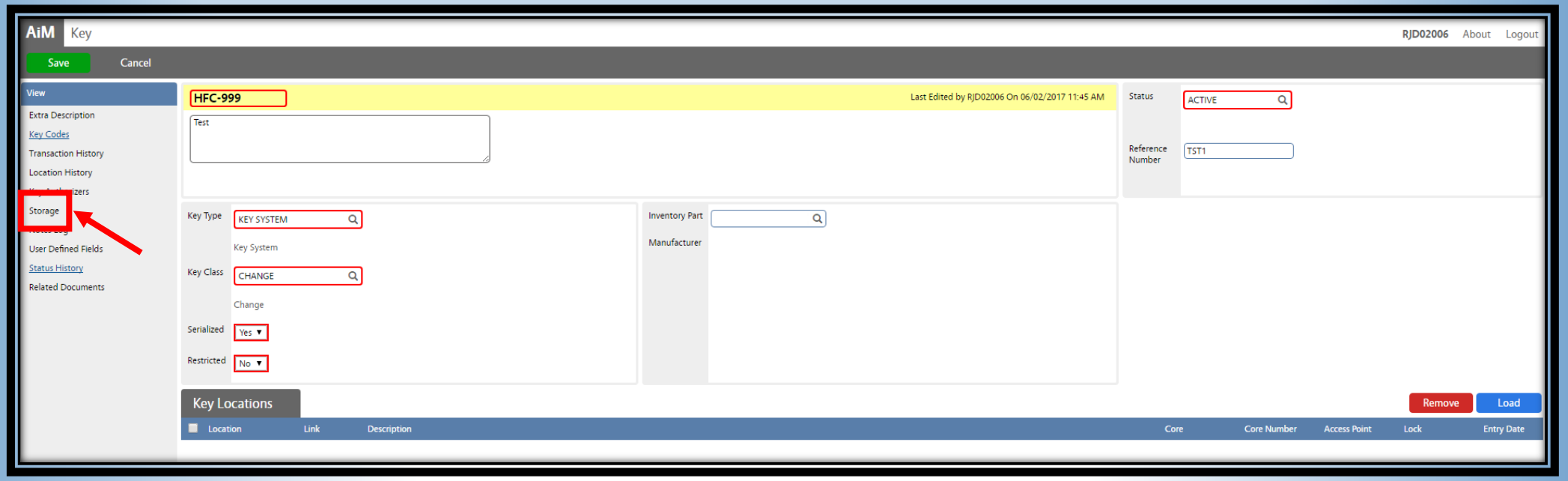
Enter Keyway and Key Bitting, then Click ***Done***

Add New Key



Click ***Done***

Add New Key

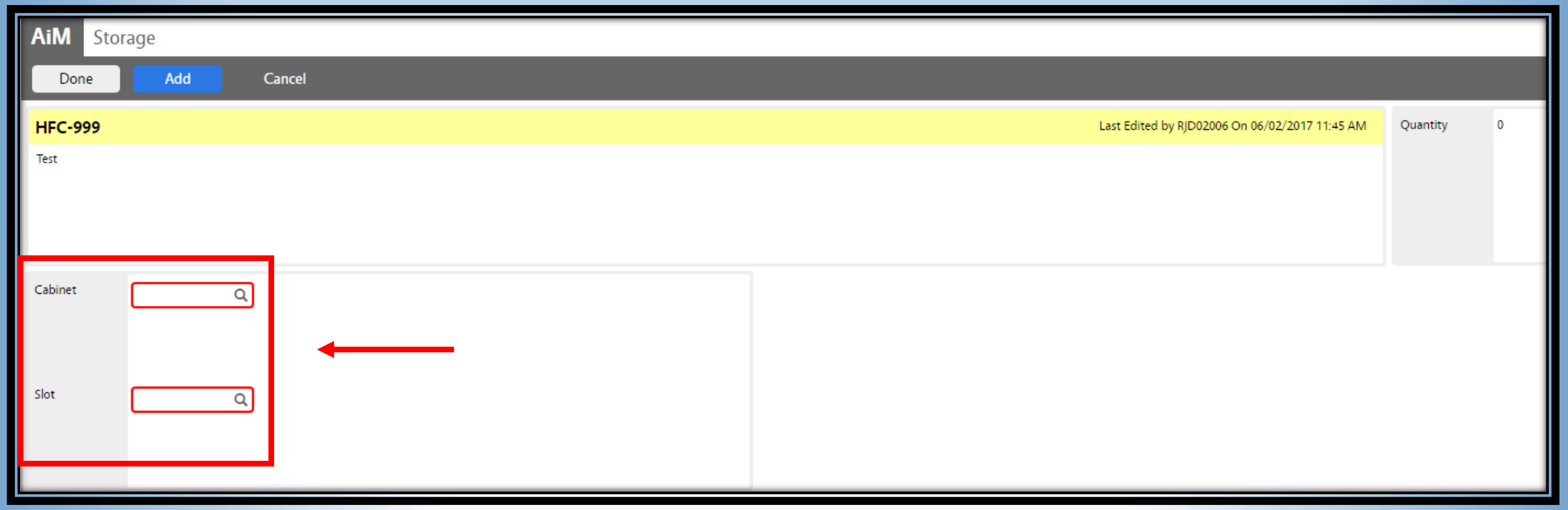


Click Storage link

Add New Key

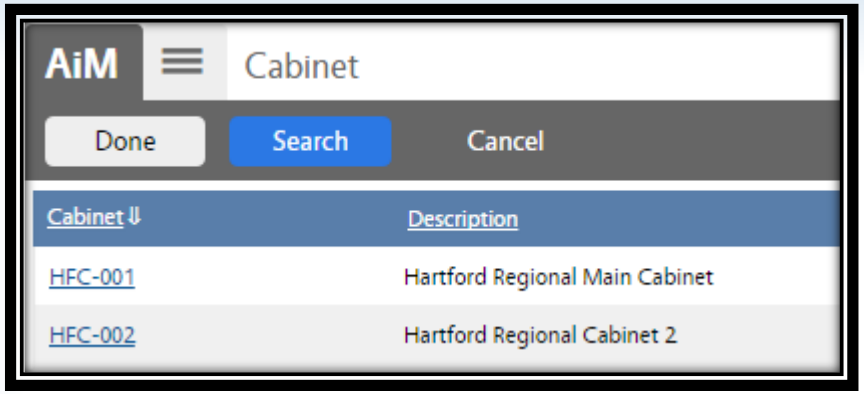
Click ***Add***

Add New Key



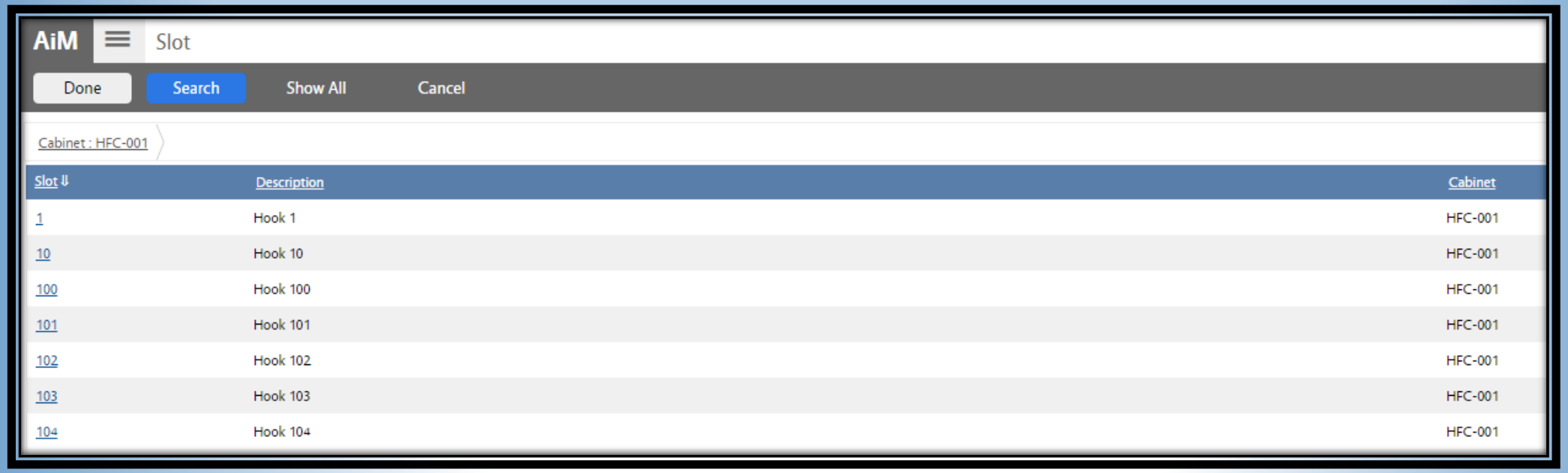
Select Cabinet and Slot

Add New Key



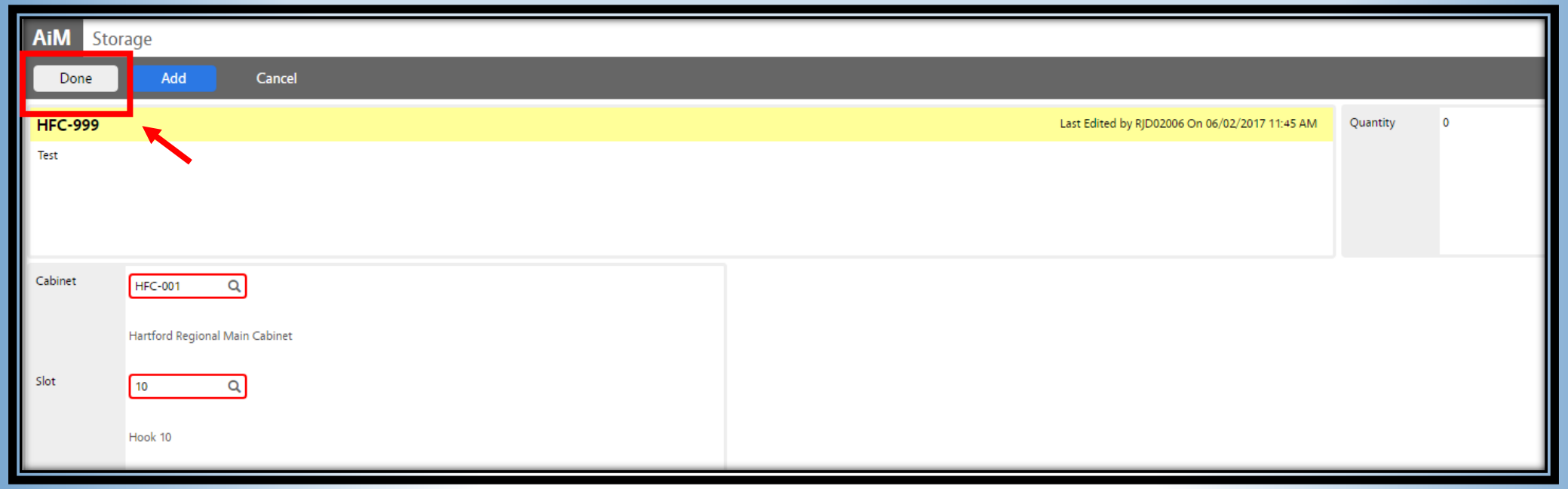
Click on Cabinet ID

Add New Key



Click on Slot ID

Add New Key

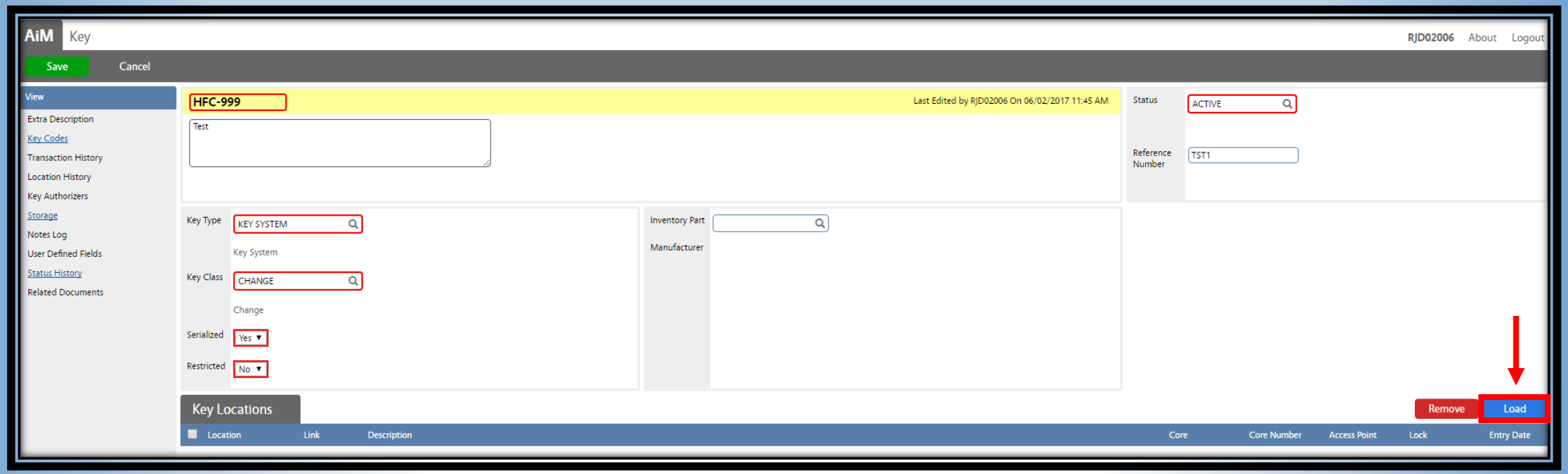


Click ***Done***

Add New Key

Click ***Done***

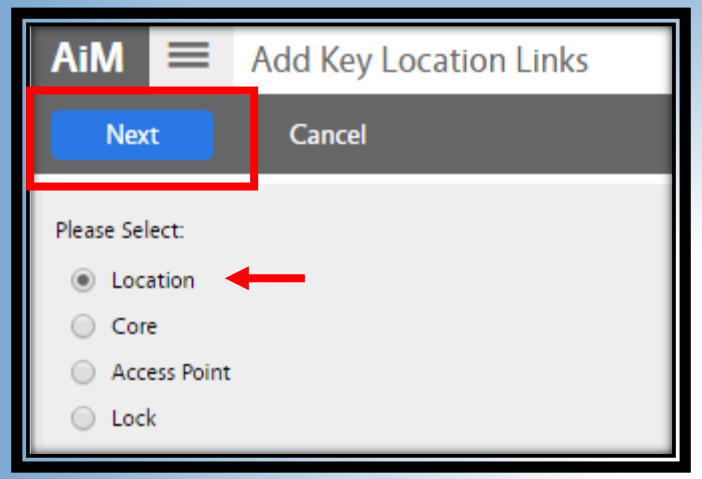
Add New Key



Click ***Load***

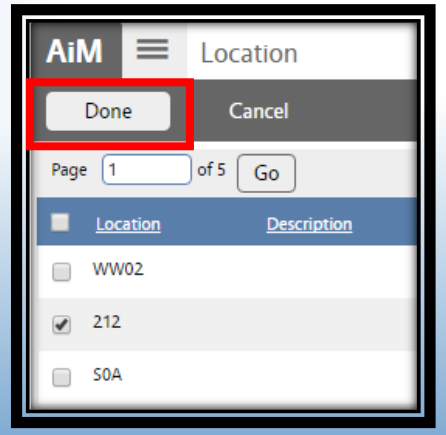
Add New Key

Add New Key

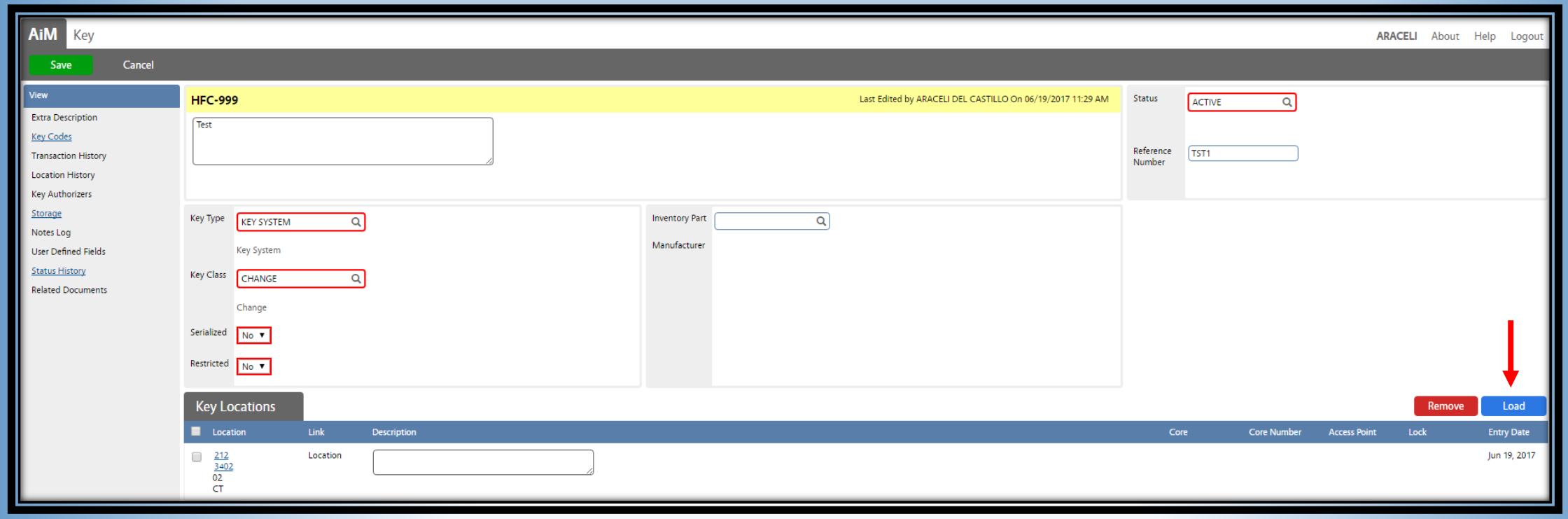


Select Location, click ***Next***

Enter search criteria, then click ***Execute***



Select Location ID(s), then click ***Done***



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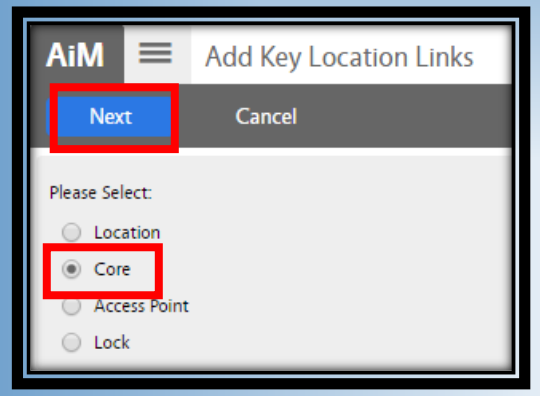
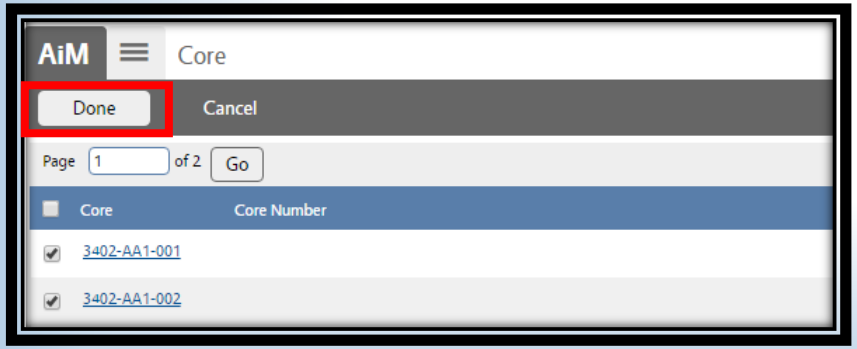
Add New Key



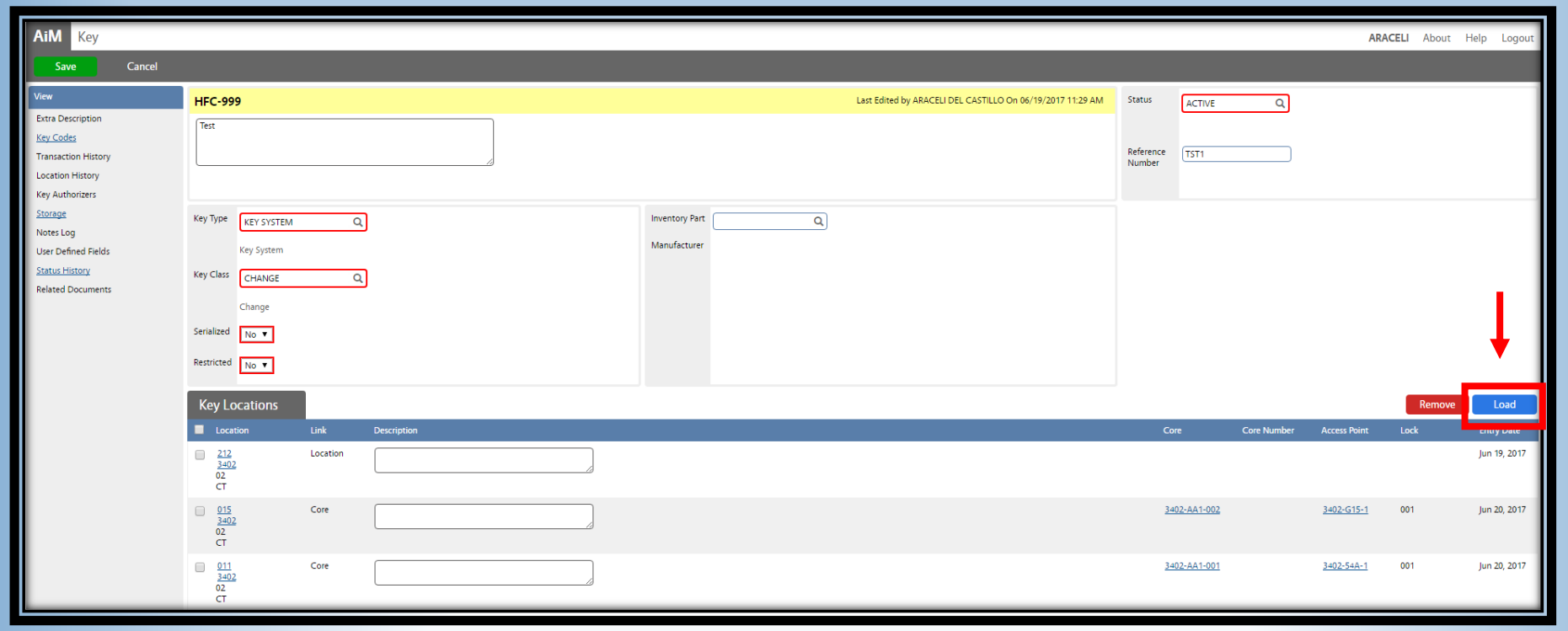
Select Core, click ***Next***

Enter search criteria, then click ***Execute***



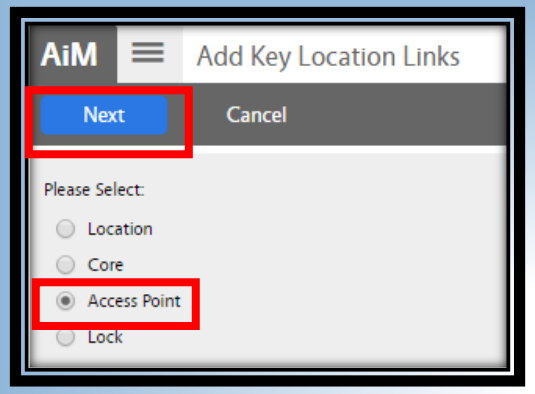
Select Core ID(s), then click ***Done***

Add New Key

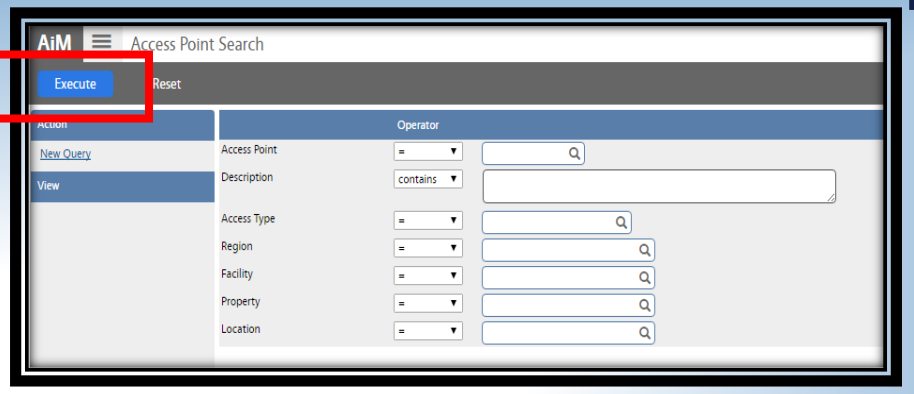


Click ***Load***

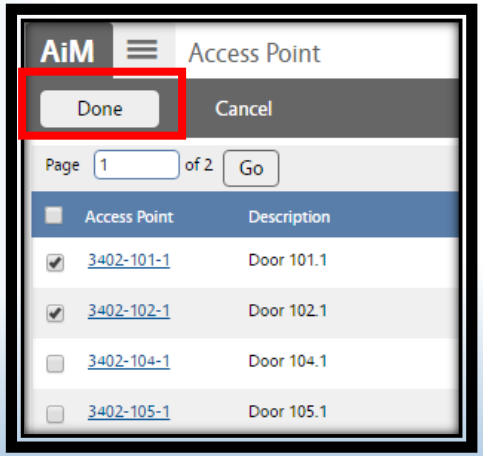
Add New Key



Select Access Point, click ***Next***

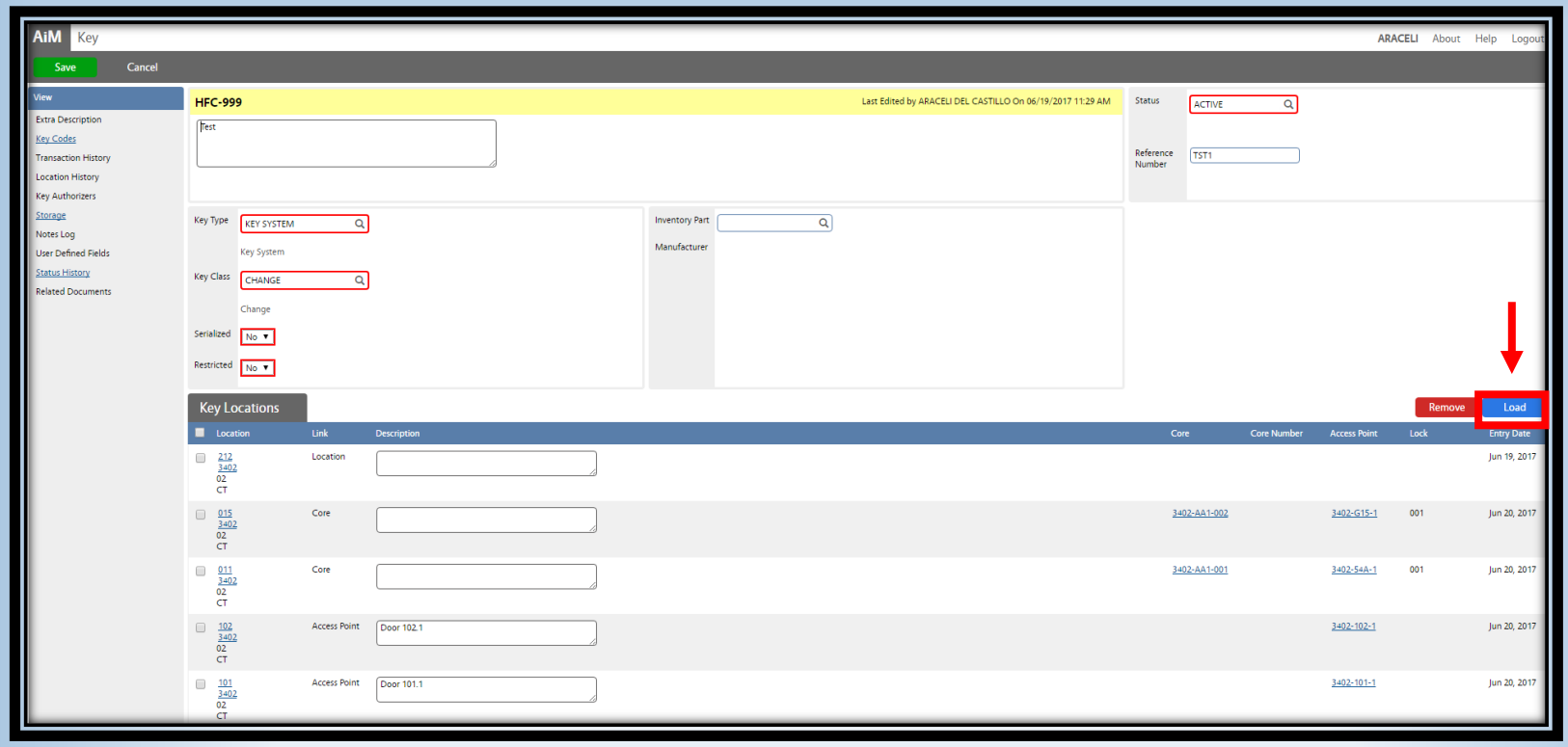


Enter search criteria, then click ***Execute***



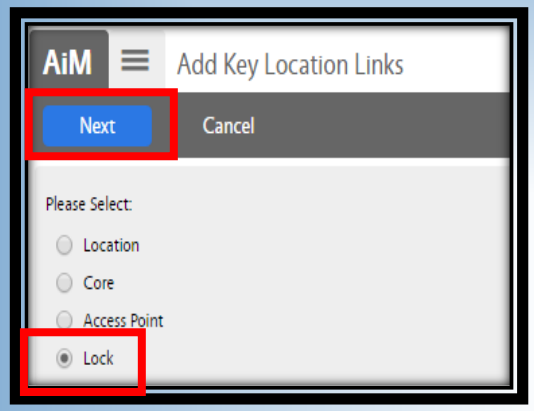
Select Access Point ID(s), then click ***Done***

Add New Key



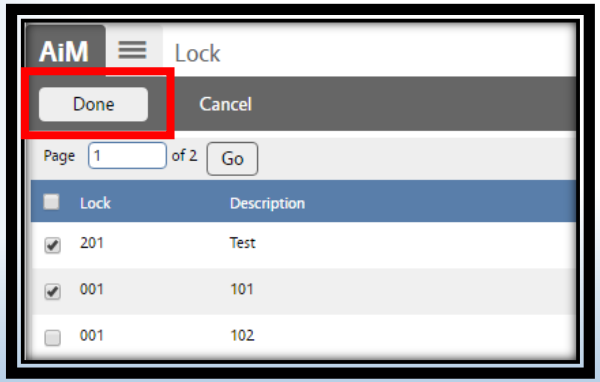
Click ***Load***

Add New Key



Select Lock, click ***Next***

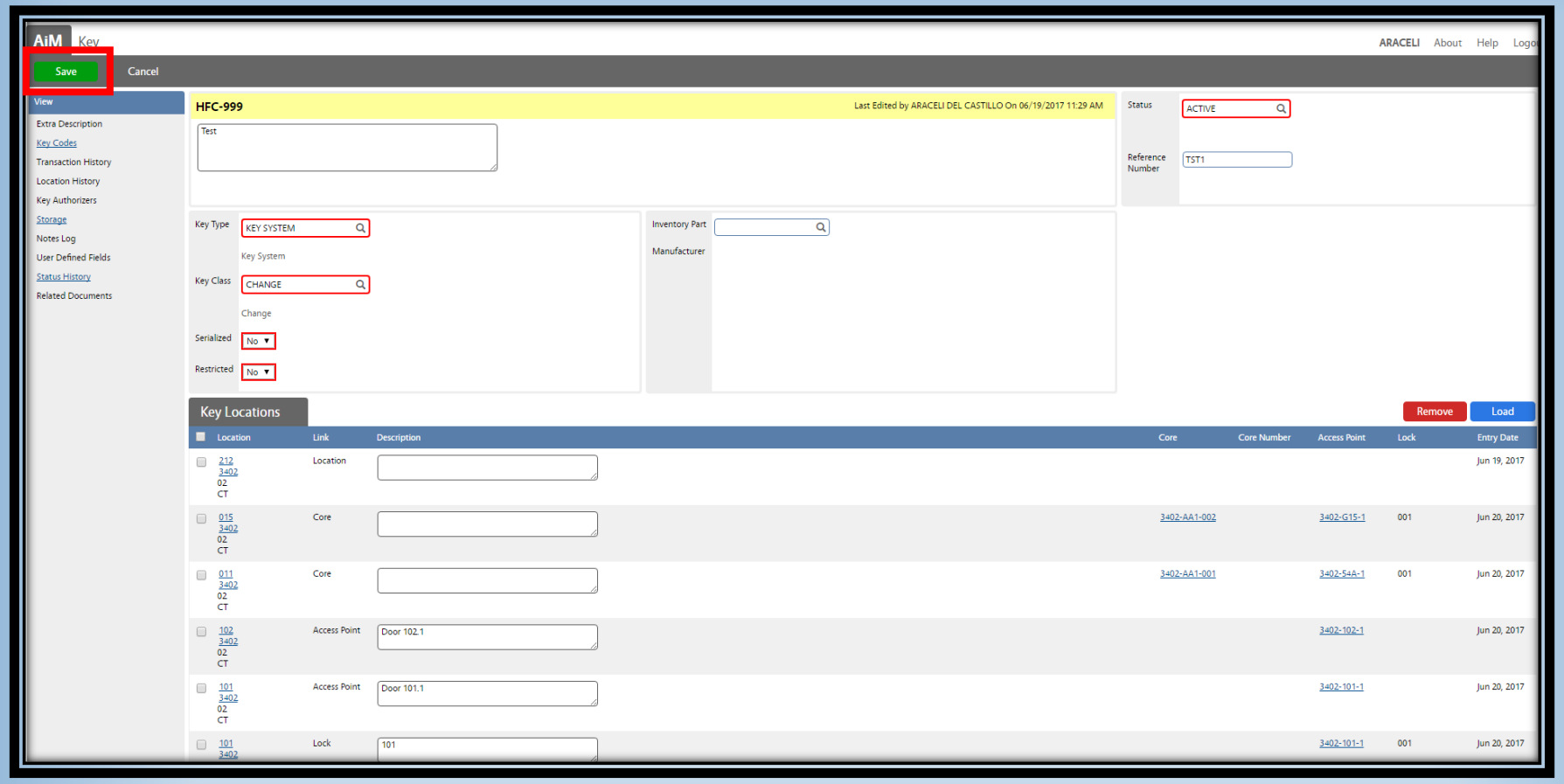
Enter search criteria, then click ***Execute***



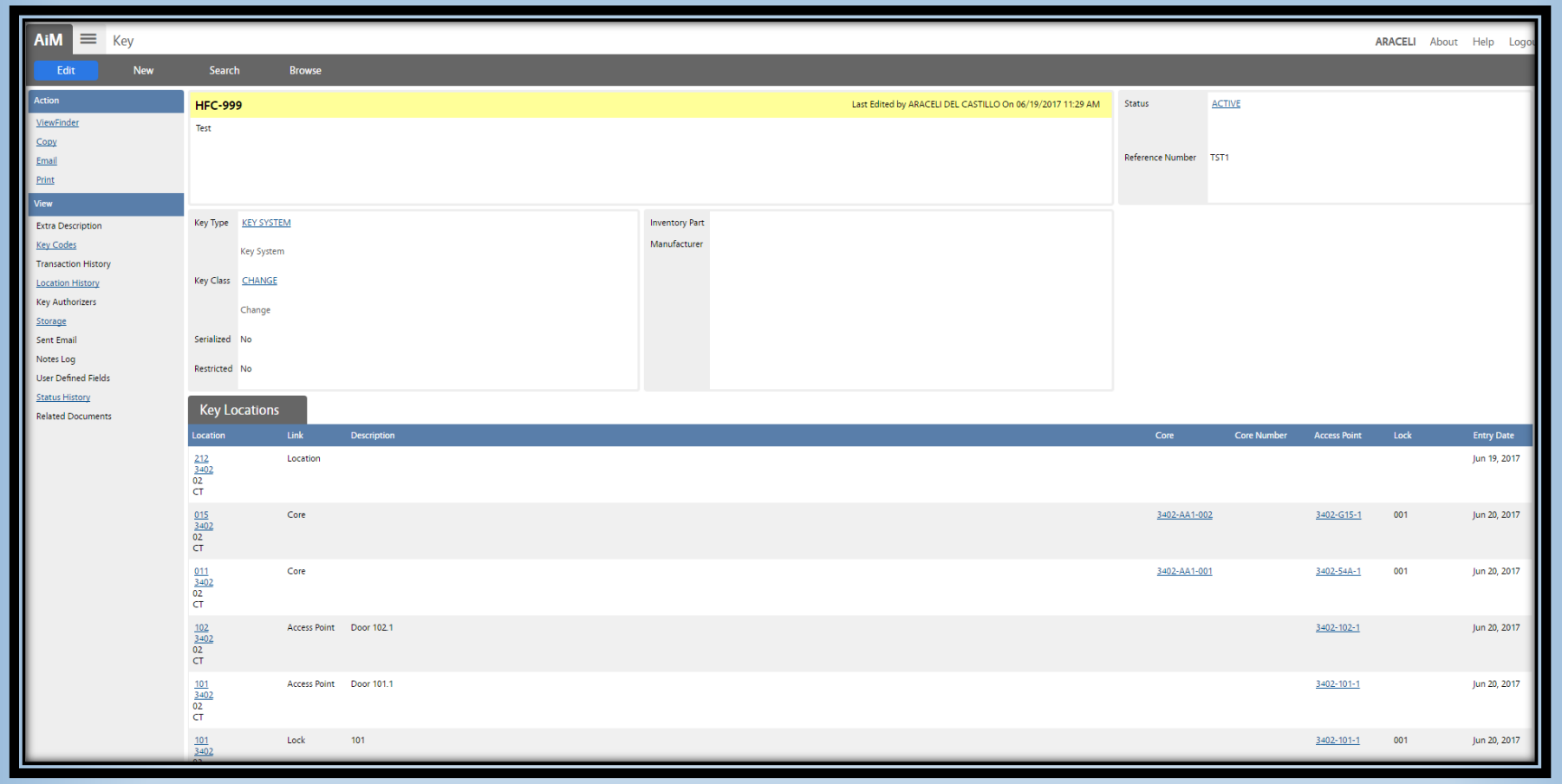
Select Lock ID(s), then click ***Done***

Add New Key

Add New Key



Click ***Save***


AiM
Key
ARACELI
About
Help
Logo
Edit
New
Search
Browse
Action
ViewFinder
Copy
Email
Print
View
Extra Description
Key Codes
Transaction History
Location History
Key Authorizers
Storage
Sent Email
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User Defined Fields
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Key Locations
Location
Link
Description
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Core Number
Access Point
Lock
Entry Date
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Access Point
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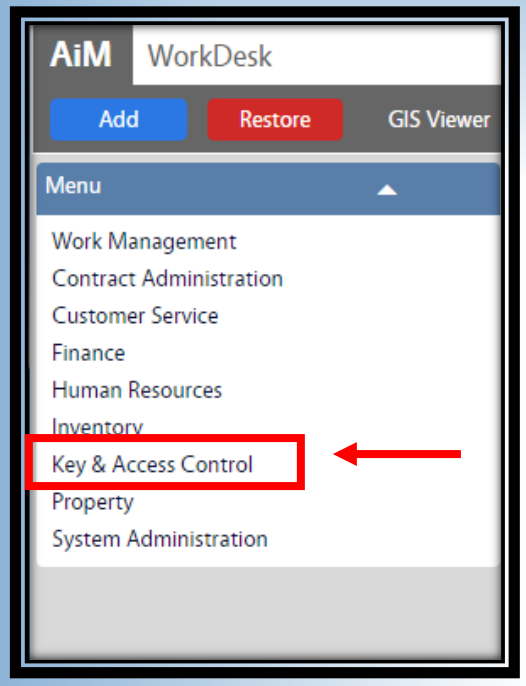
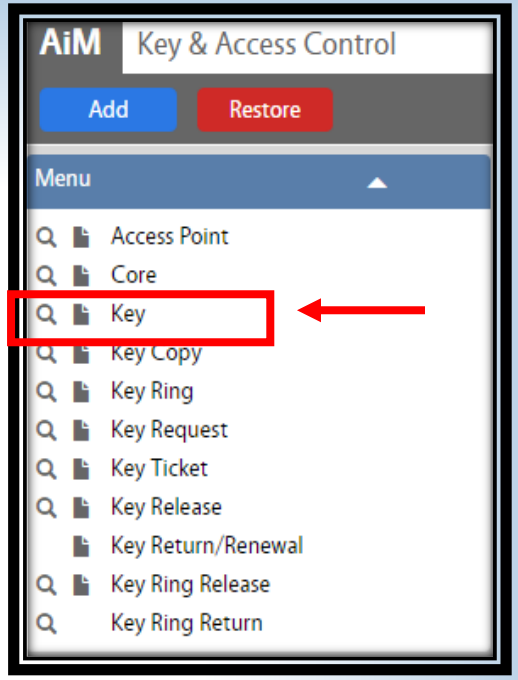
Add New Key

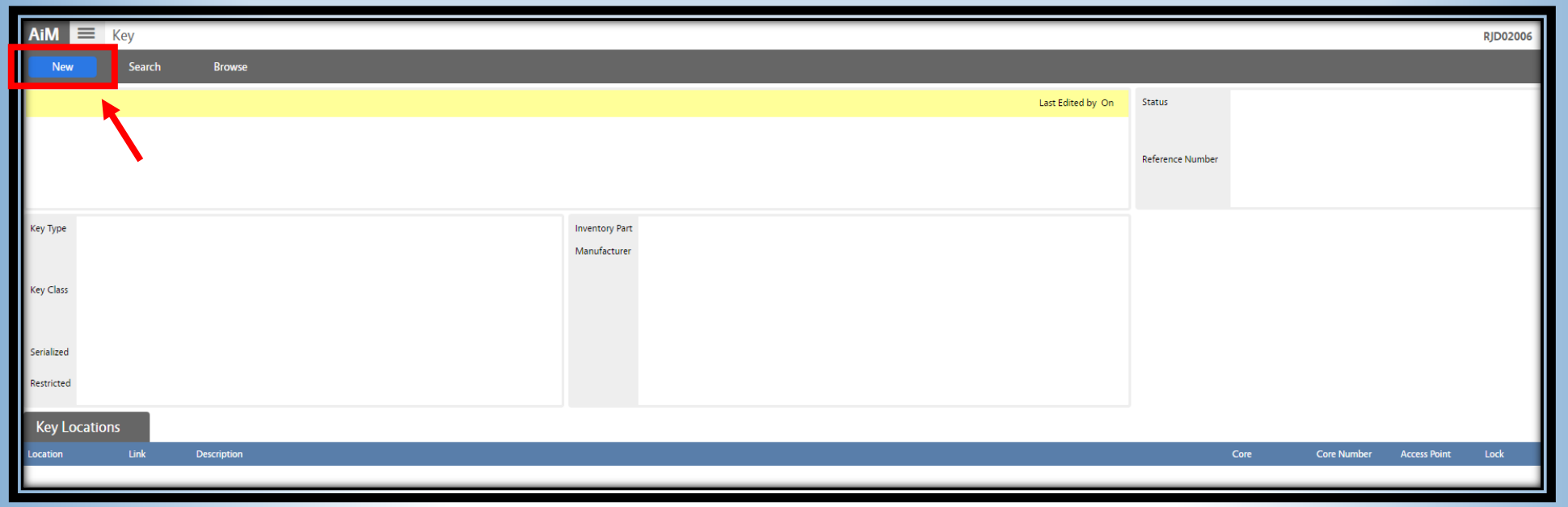
New Schedule

New Schedule



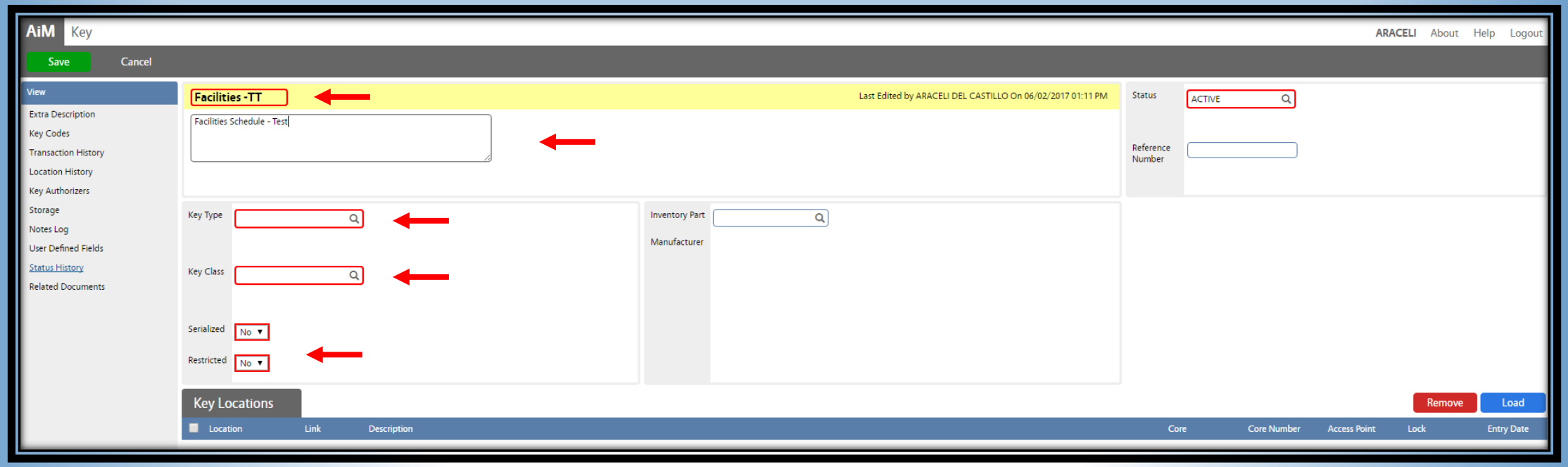
On *WorkDesk*, click Key & Access Control, then click Key





Click ***New***

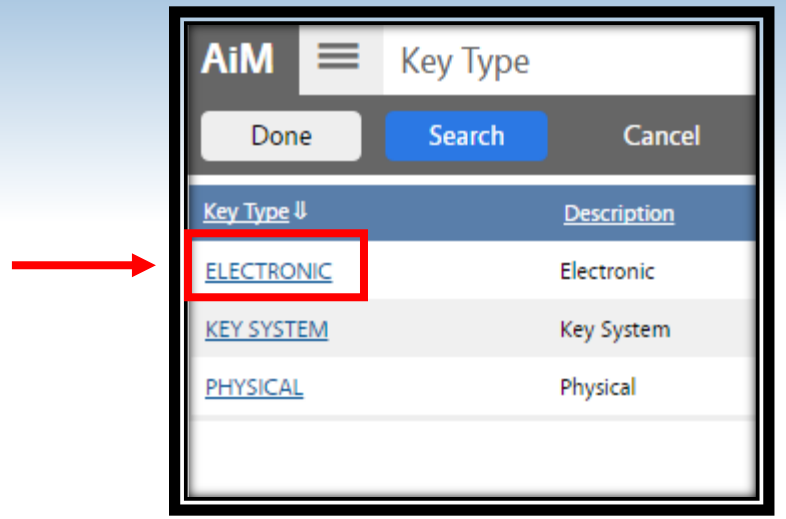
New Schedule



Enter Key ID, Description, set Key Type to Electronic, Key Class is populated, status is Active by default

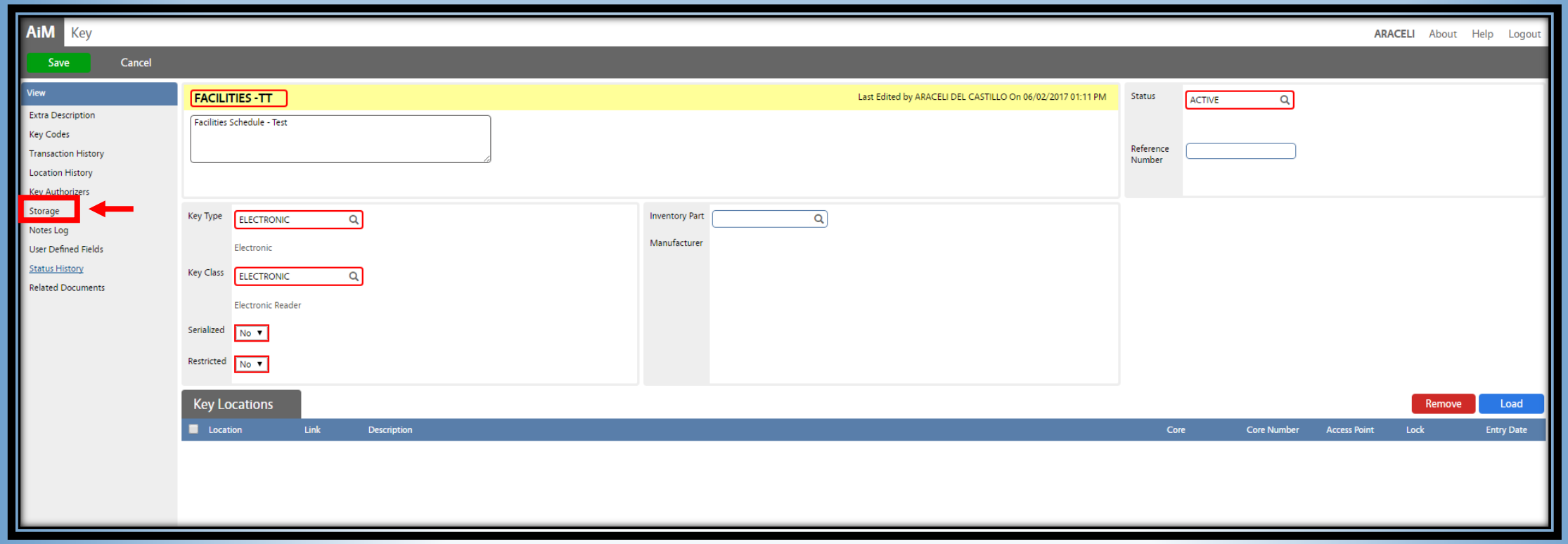
Set Serialized and Restricted to "No"

New Schedule



Select Electronic

New Schedule

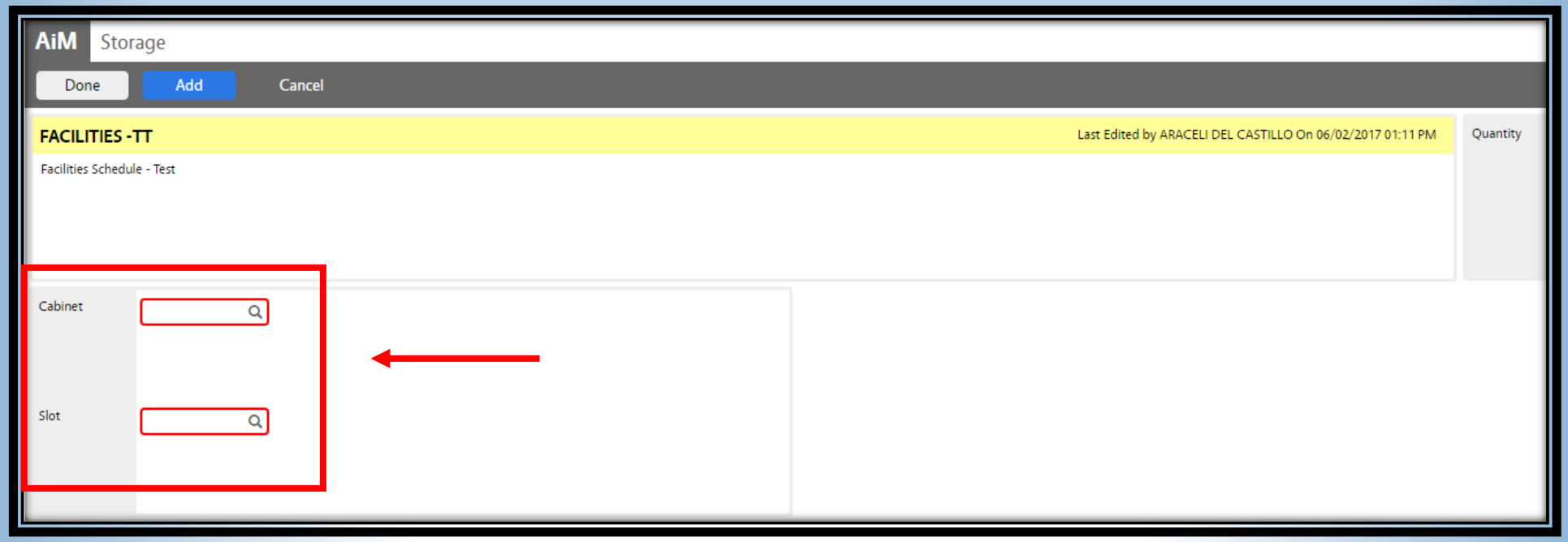


Click Storage link

New Schedule

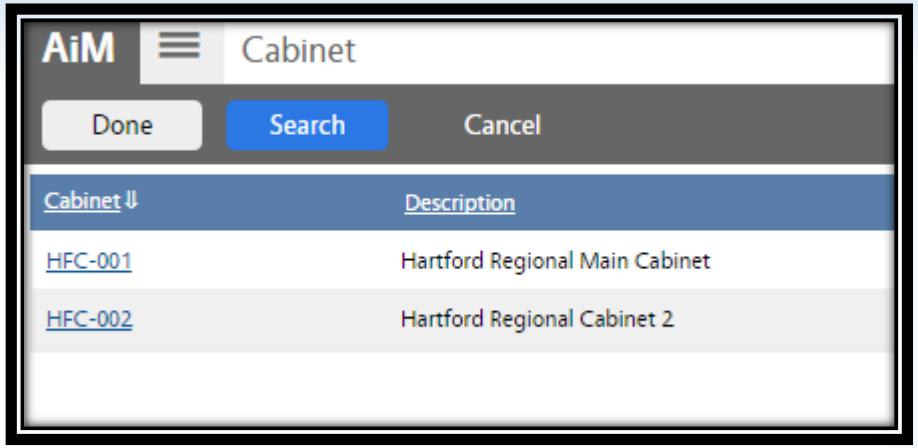
Click ***Add***

New Schedule



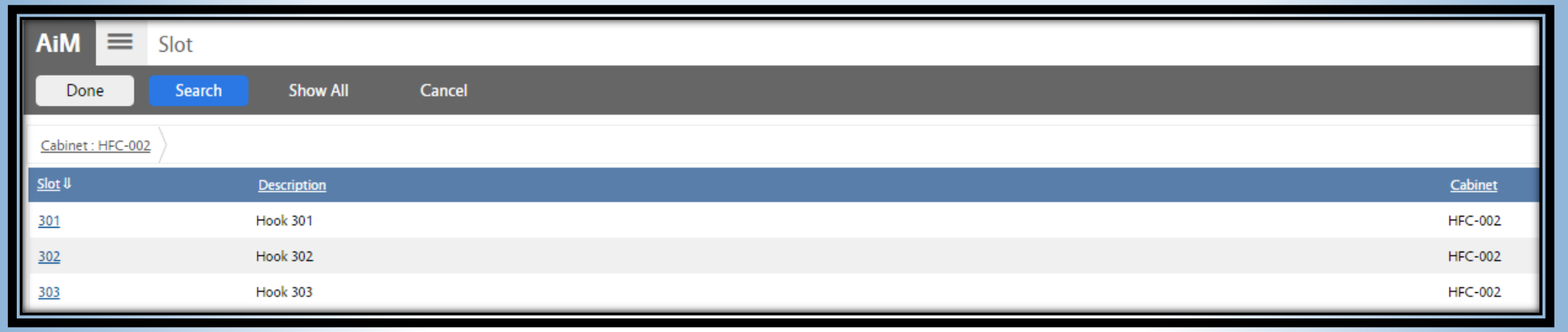
Enter Schedule System and Schedule Name

New Schedule



Select Schedule ID

New Schedule



Select Schedule Name ID

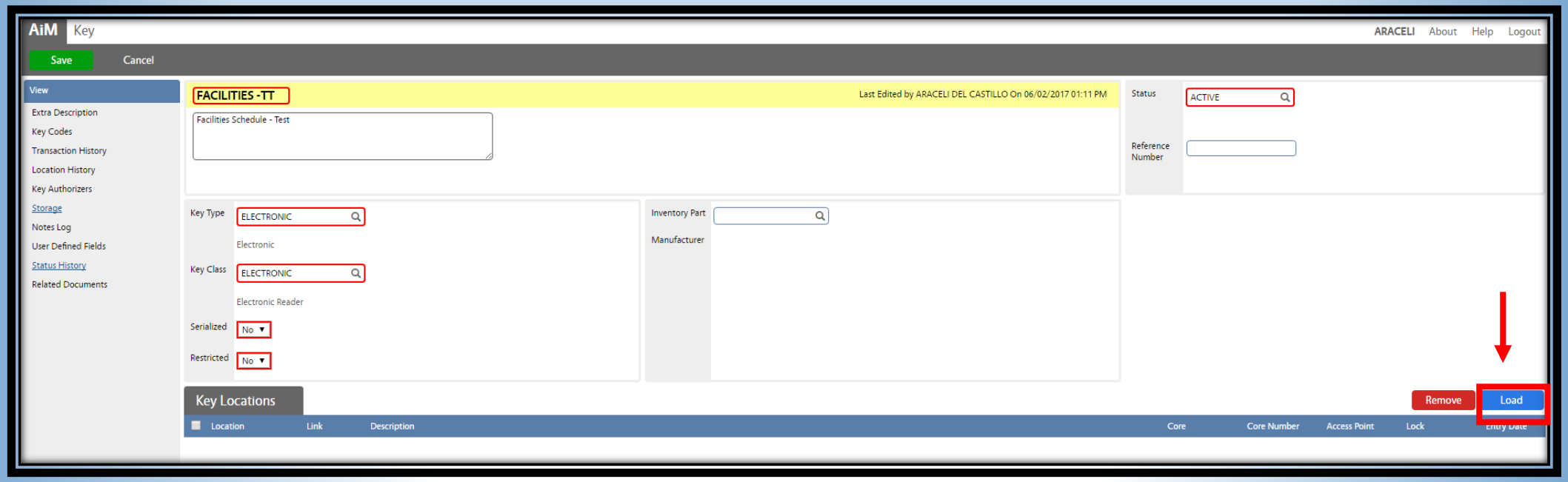
New Schedule

Click ***Done***

New Schedule

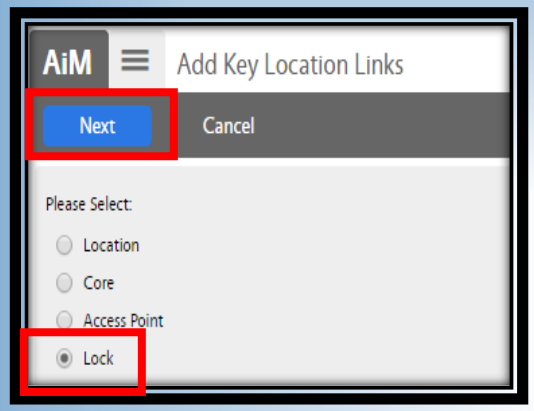
Click ***Done***

New Schedule



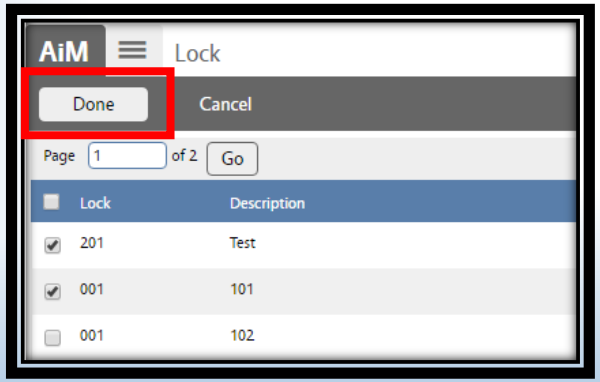
Click ***Load***

New Schedule



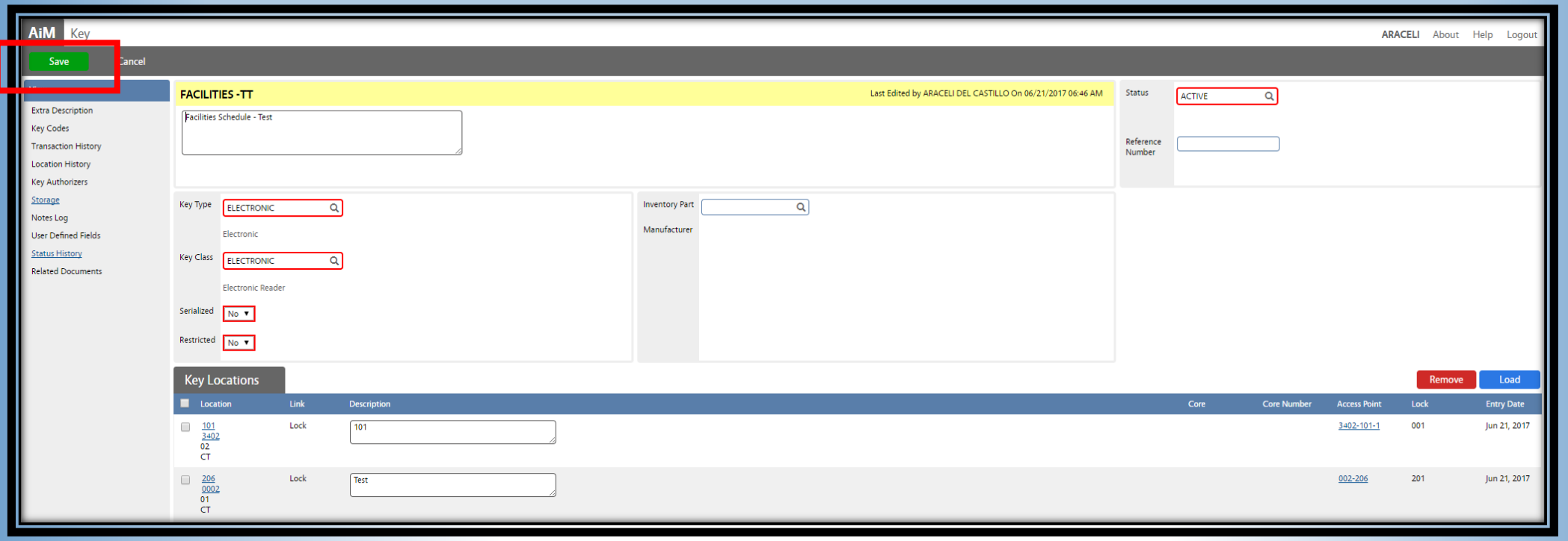
Select Lock, click ***Next***

Enter search criteria, then click ***Execute***



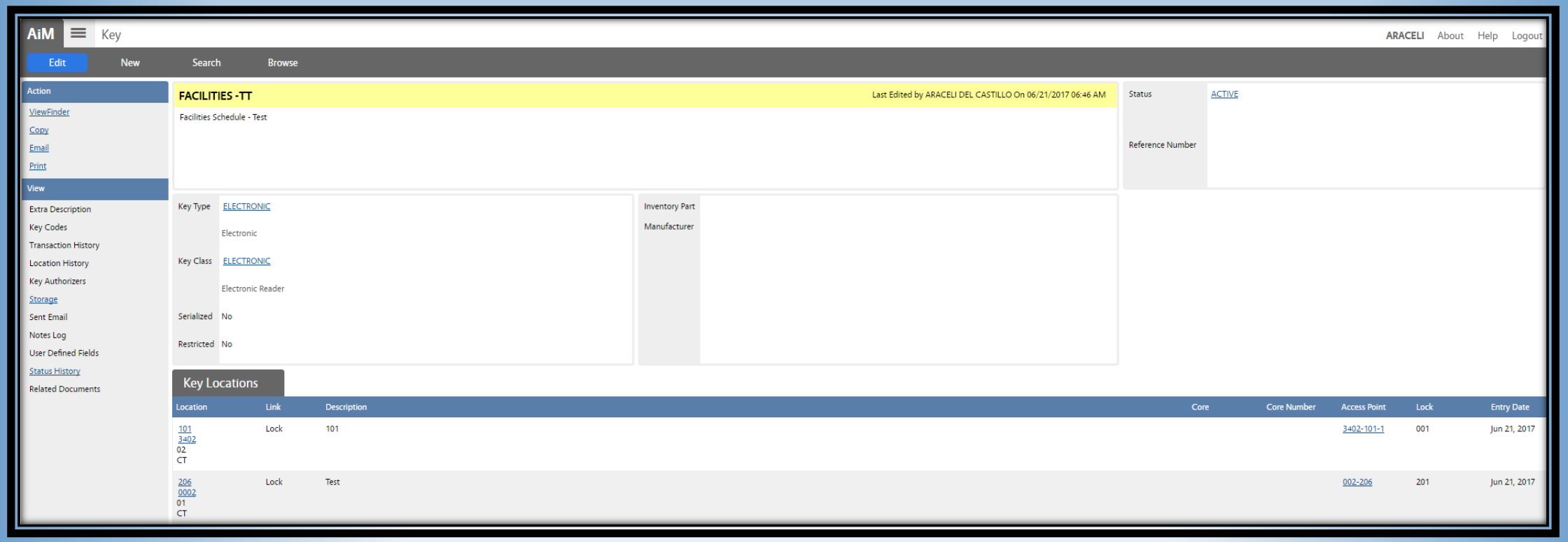
Select Lock ID(s), then click ***Done***

New Schedule



Click ***Save***

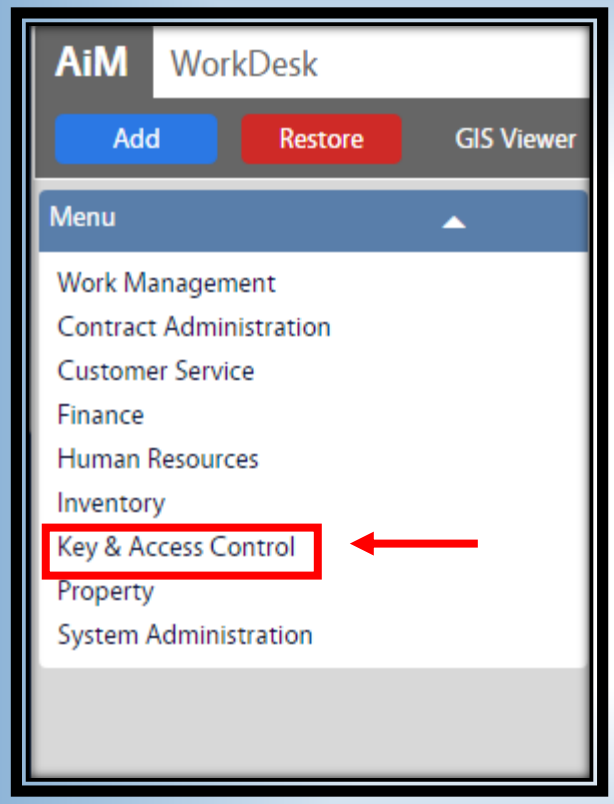
New Schedule



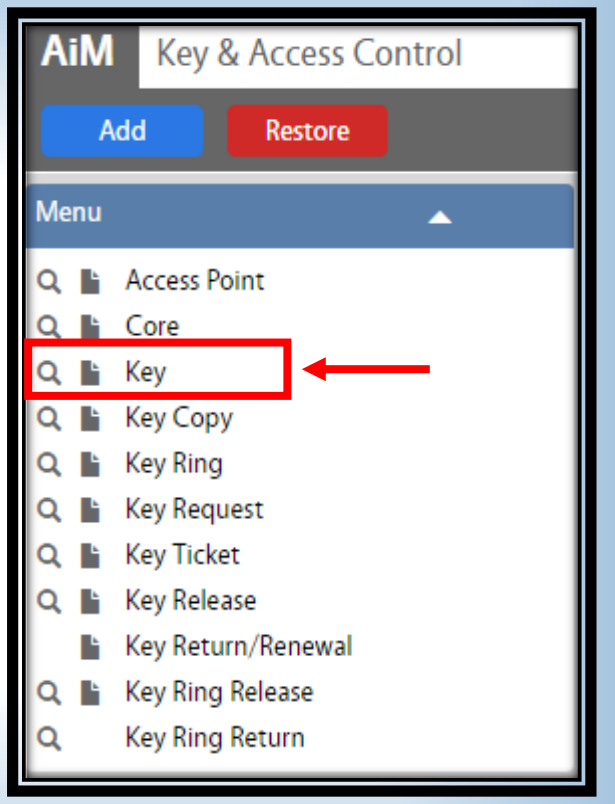
New Schedule

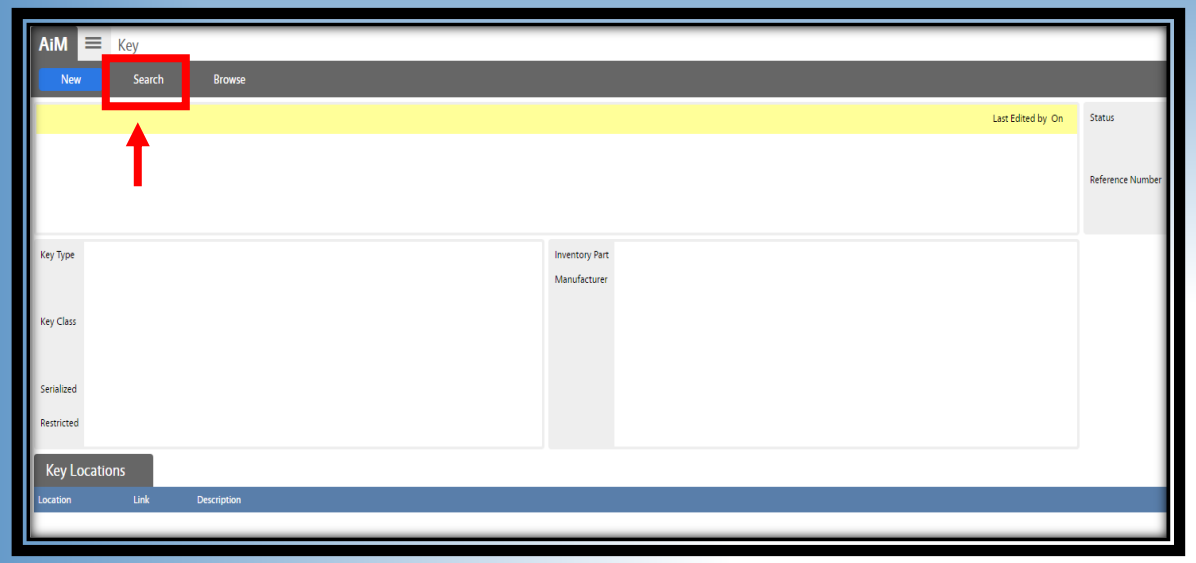
New Key Copy

New Key Copy



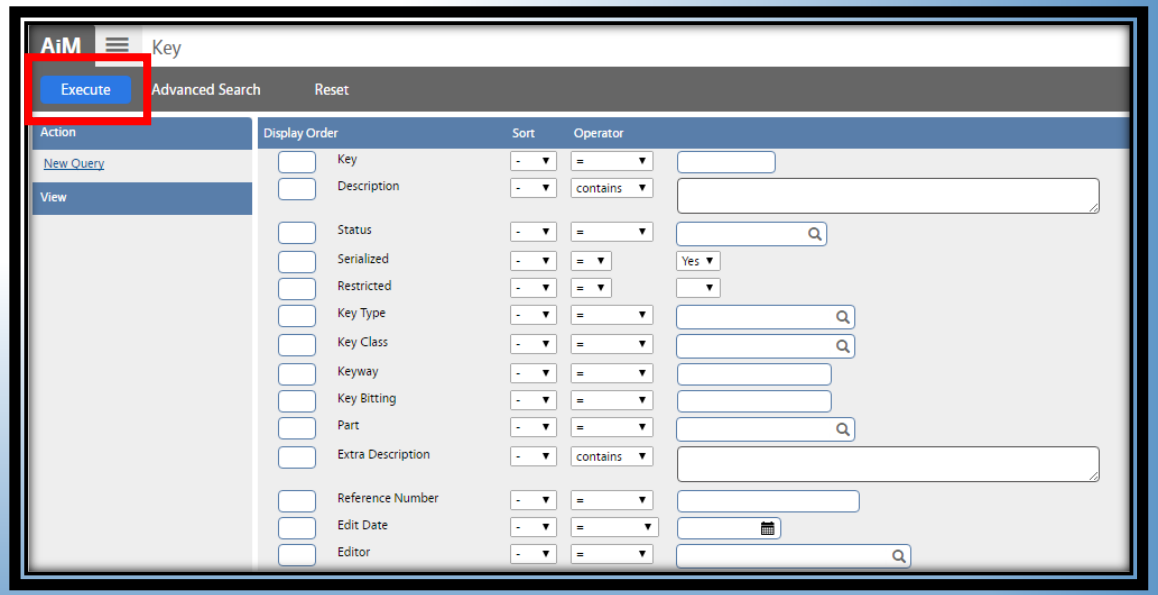
On *WorkDesk*, click Key & Access Control, then click Key





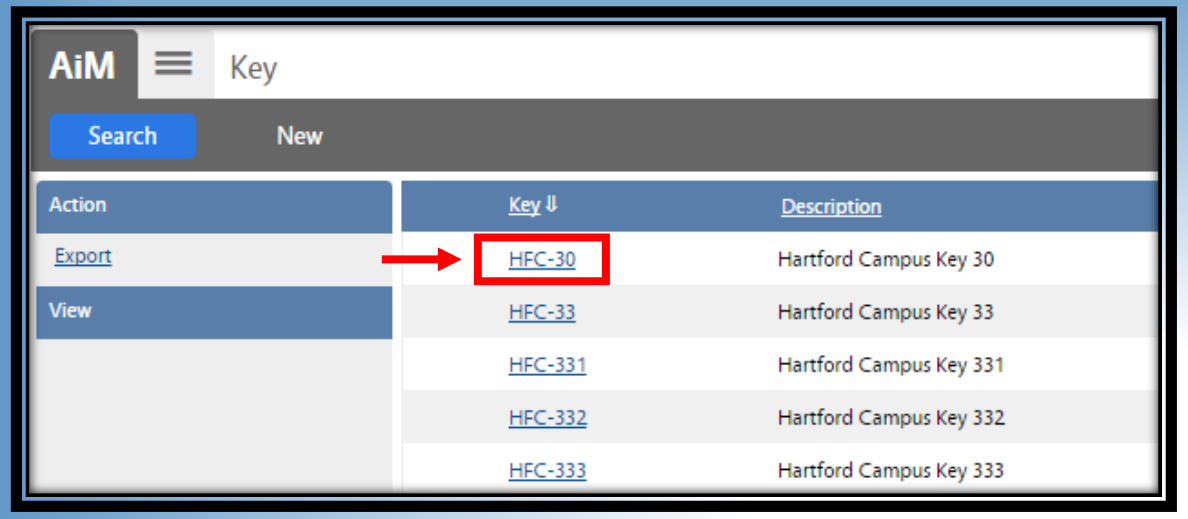
Click ***Search***

Enter search criteria, set Serialized to *Yes*, then click ***Execute***



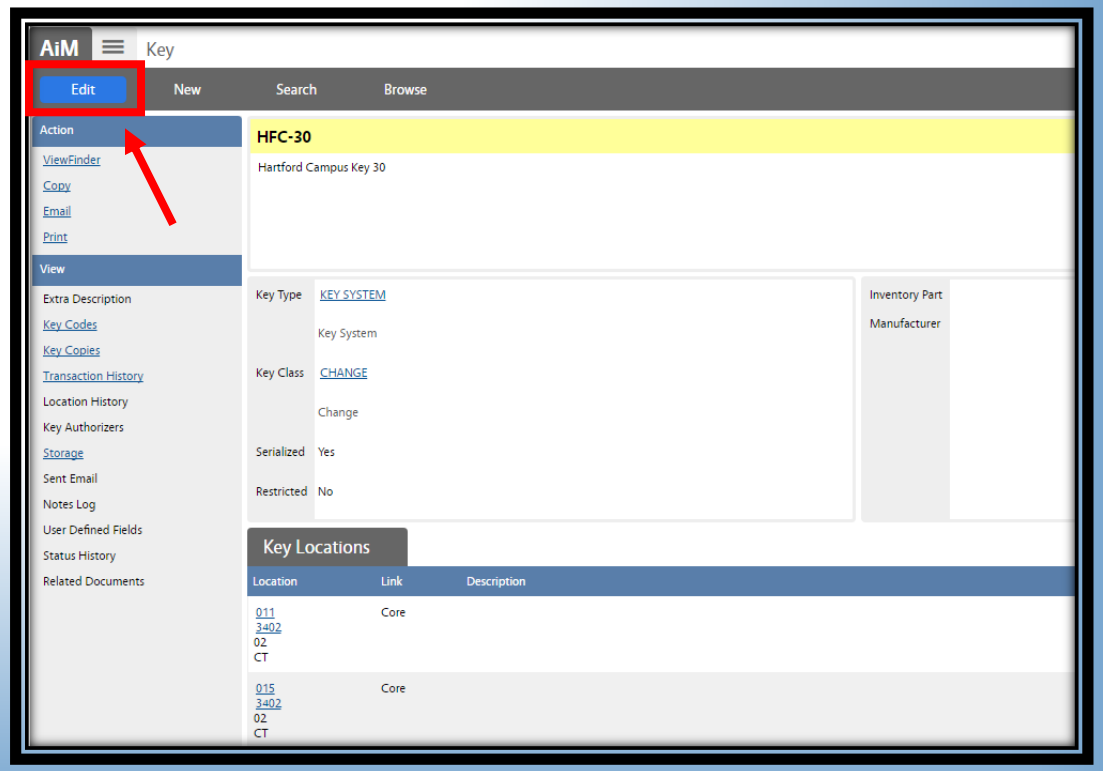
New Key Copy

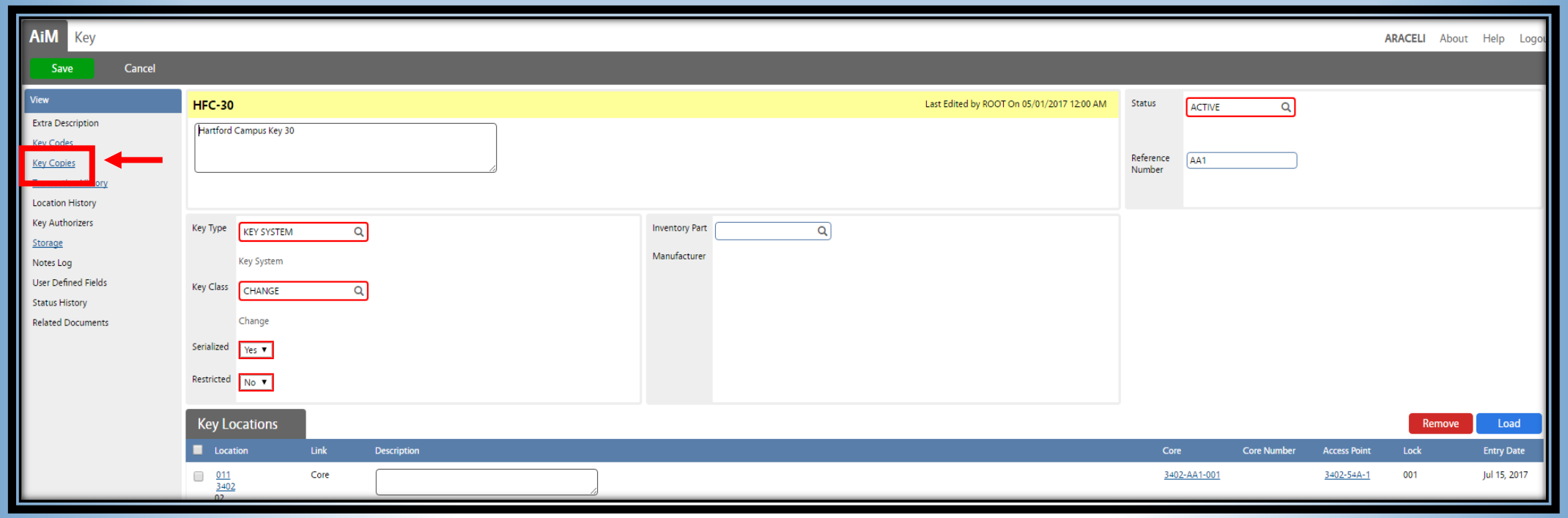
New Key Copy



Select Key ID

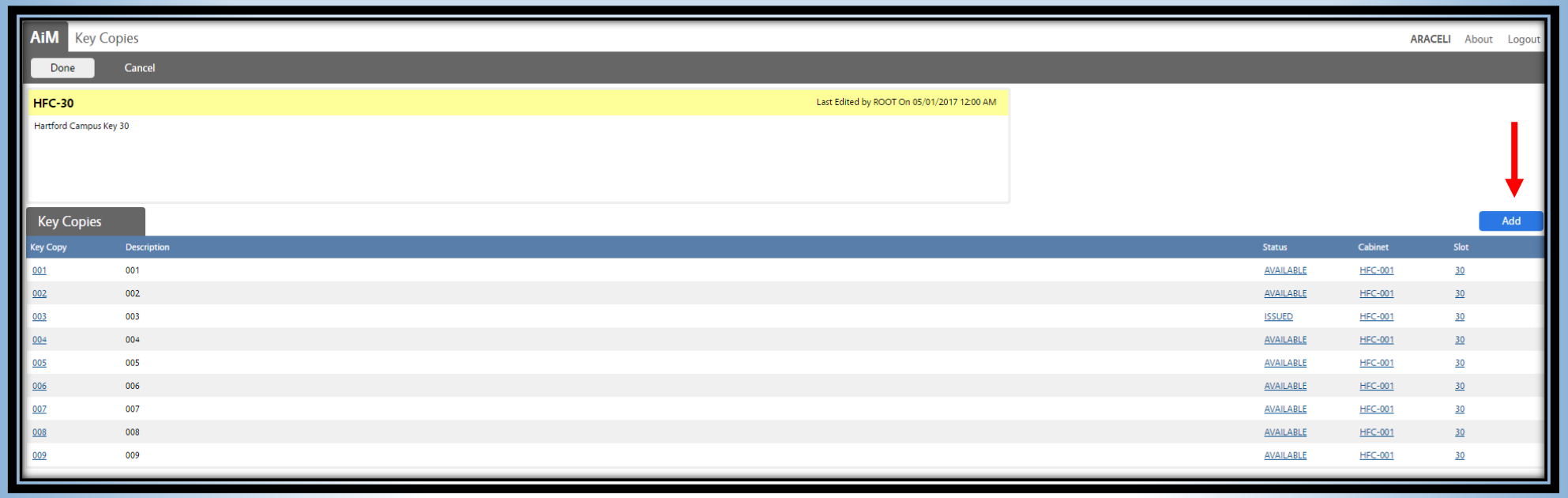
Click ***Edit***





Click Key Copies

New Key Copy



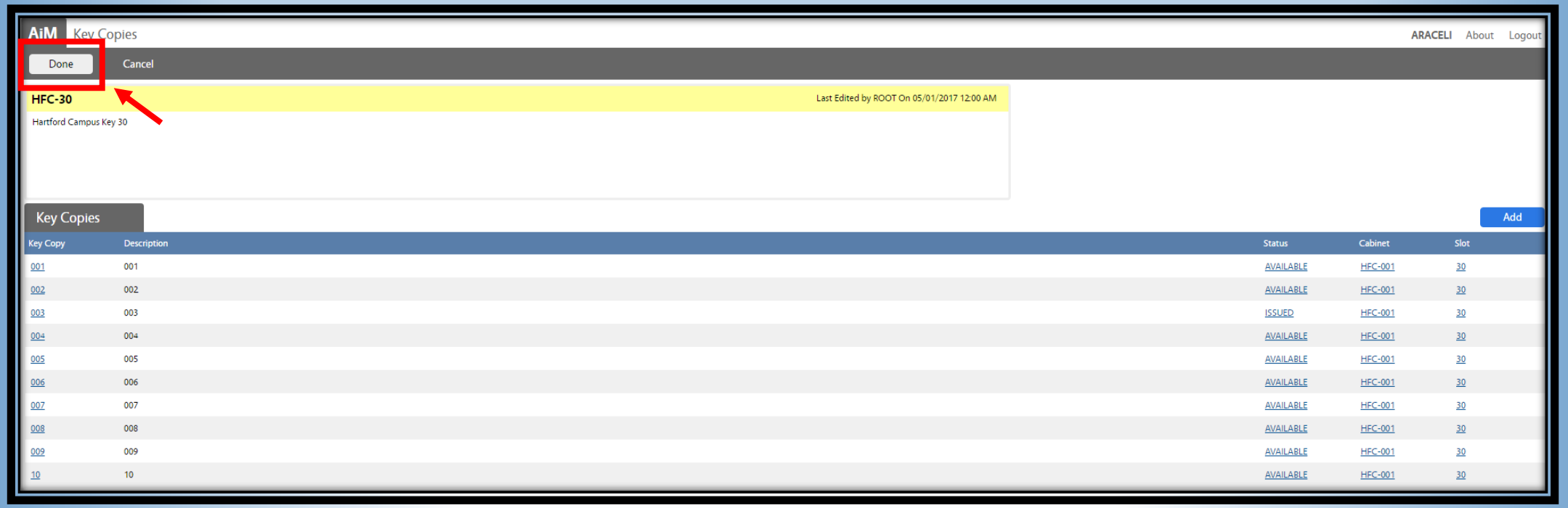
Click ***Add***

New Key Copy

The system populate a sequence number automatically

Enter description, add more copies if desired, then click **Done**

New Key Copy



Click ***Done***

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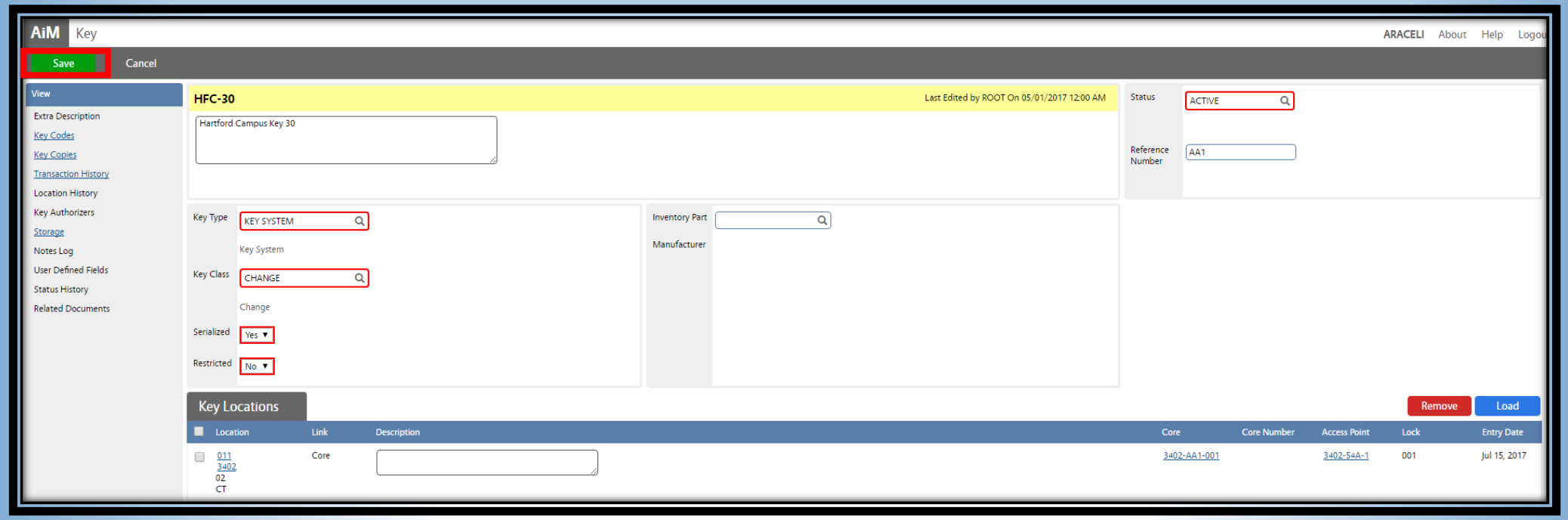
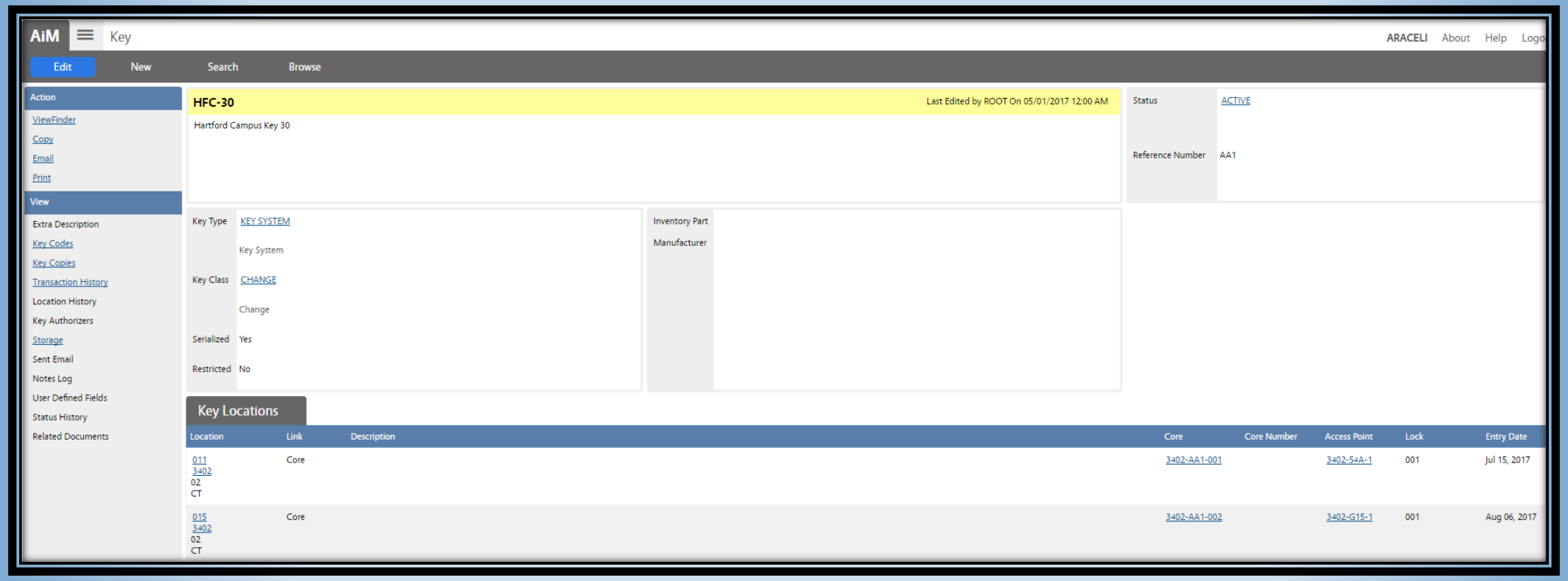


Click ***Save***

New Key Copy


AiM
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About
Help
Logo
Edit
New
Search
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Action
ViewFinder
Copy
Email
Print
View
Extra Description
Key Codes
Key Copies
Transaction History
Location History
Key Authorizers
Storage
Sent Email
Notes Log
User Defined Fields
Status History
Related Documents
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Hartford Campus Key 30
Status
ACTIVE
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AA1
Key Type
KEY SYSTEM
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No
Inventory Part
Manufacturer
Key Locations
Location
Link
Description
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Access Point
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Entry Date
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Jul 15, 2017
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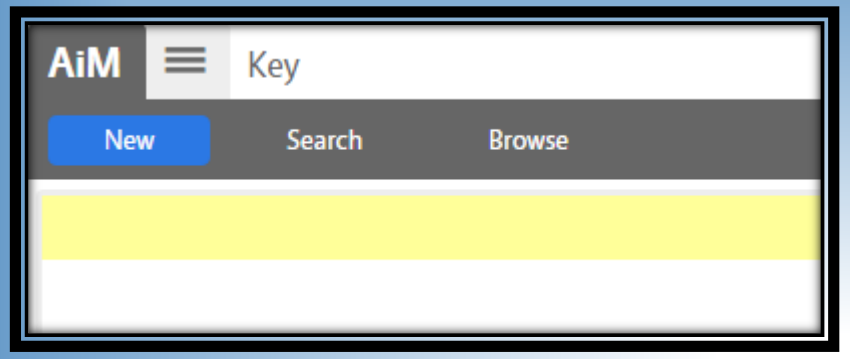
Aug 06, 2017

New Key Copy

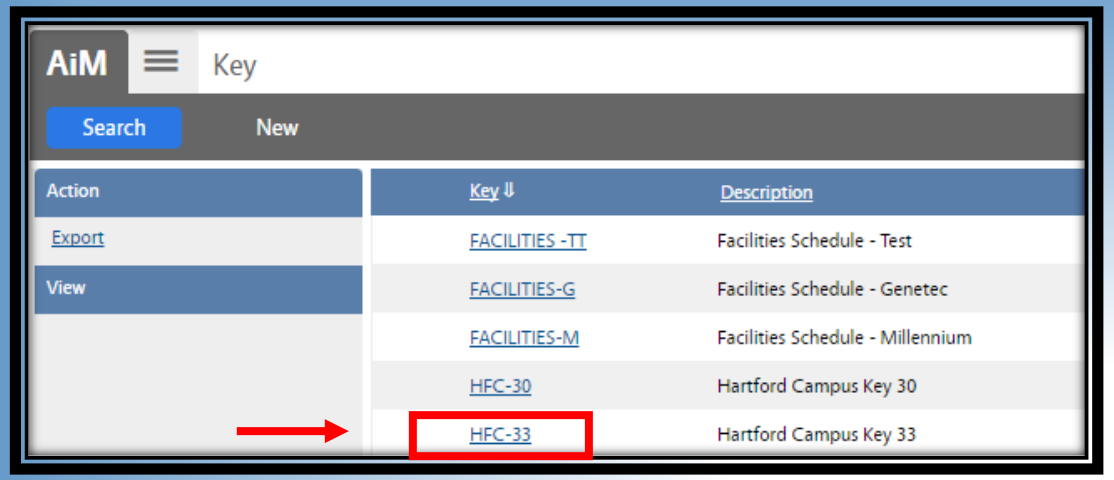
Inactivating Key Original & Copy



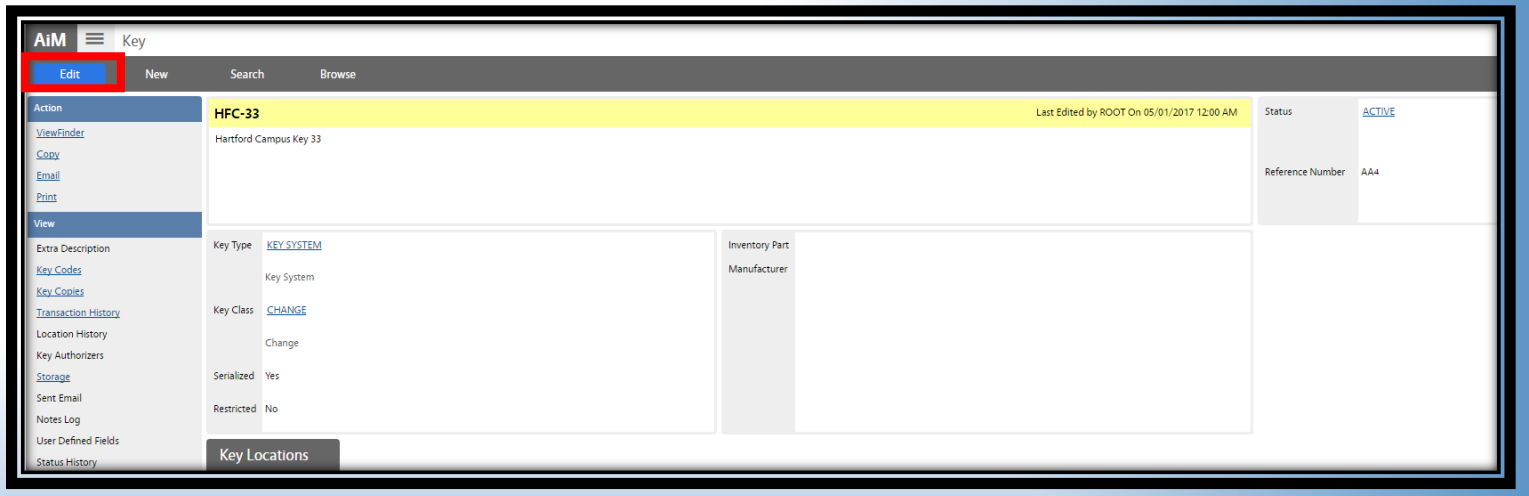
Click ***Search***

Enter search criteria, then click ***Execute***

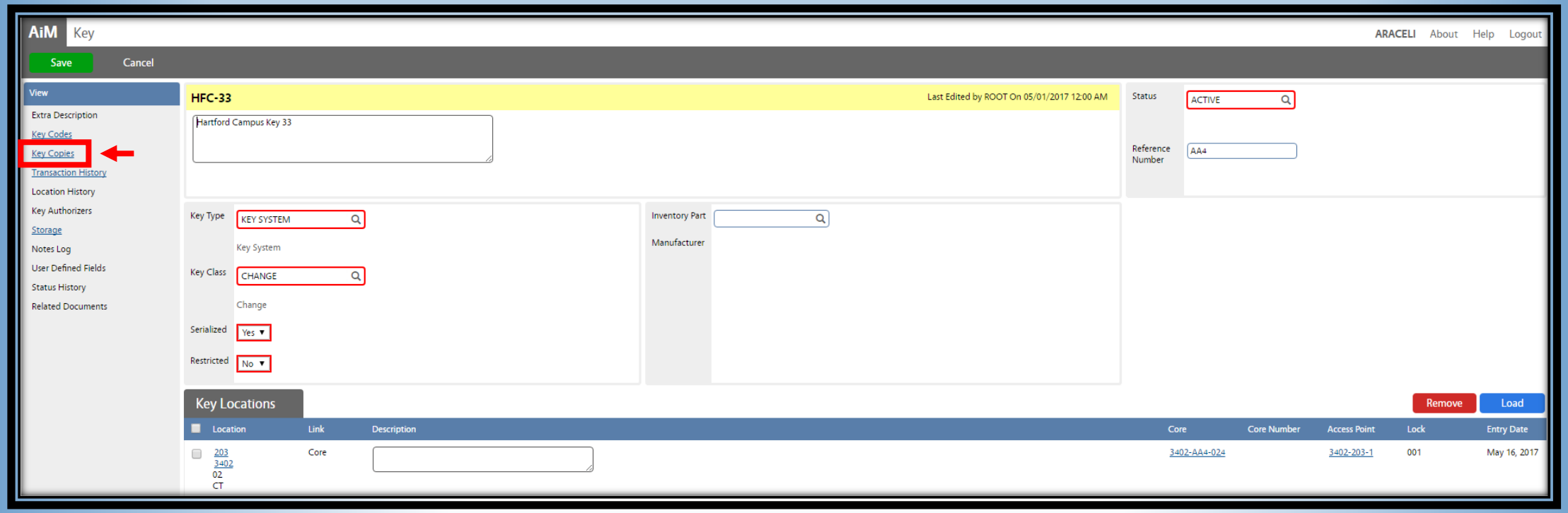
Inactivating Key Original & Copy



Click ***Edit***



Inactivating Key Original & Copy

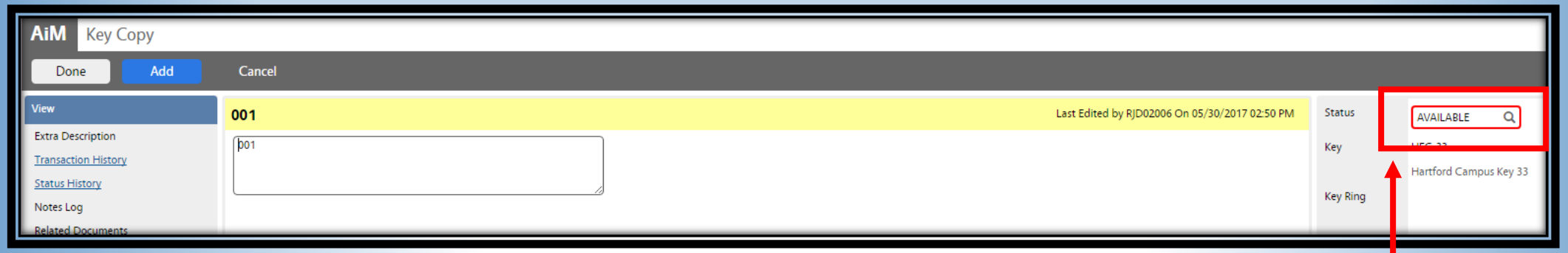


Click Key Copies

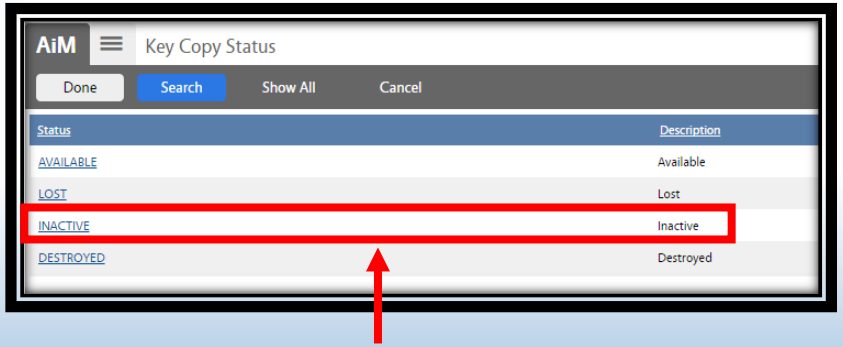
Inactivating Key Original & Copy

Click on each available Key Copy to inactivate it

Inactivating Key Original & Copy

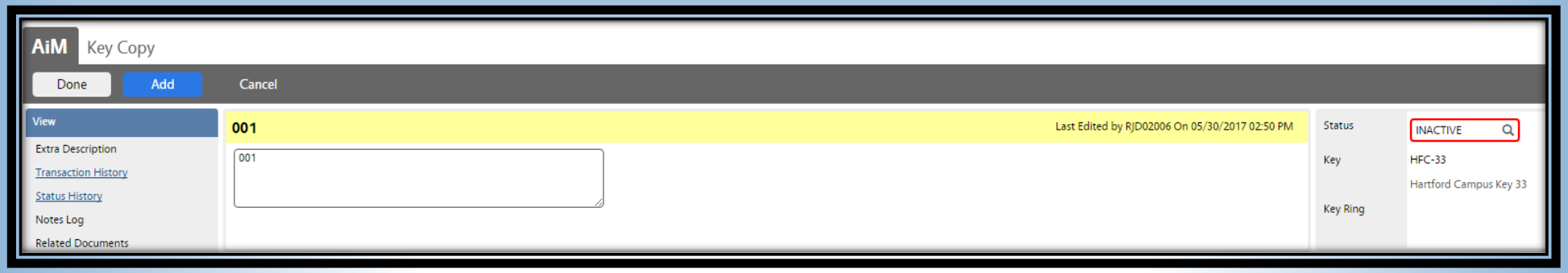


Click on the Key Copy status



Click Inactive

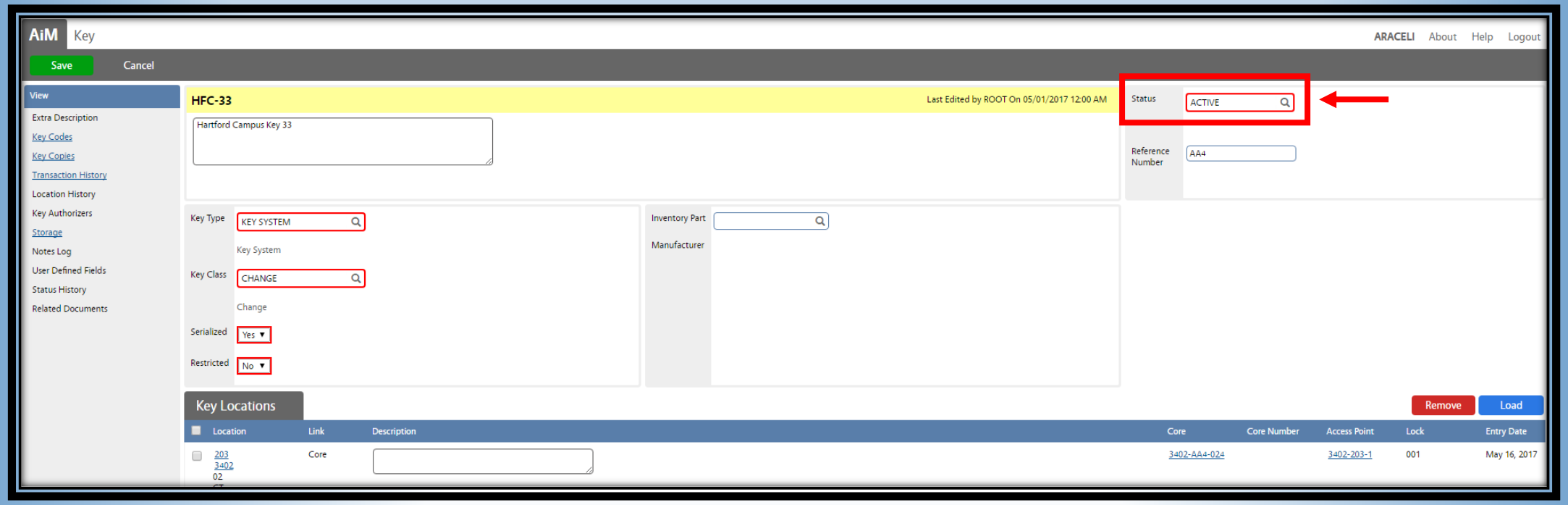
Inactivating Key Original & Copy



Click ***Done***

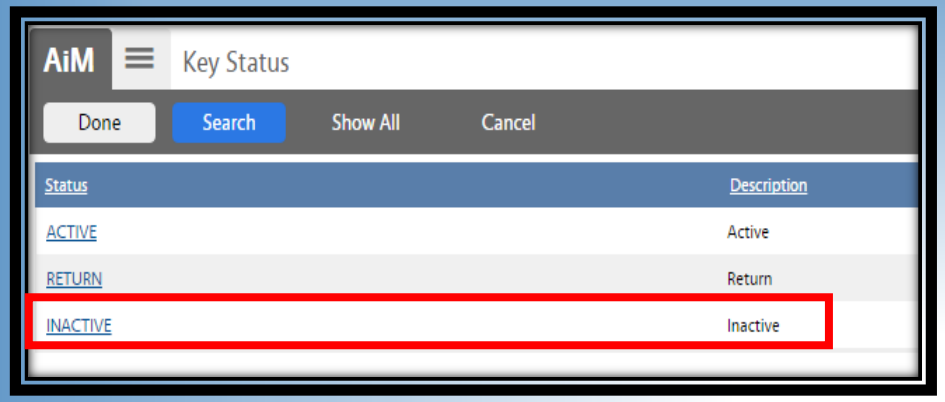
Click ***Done***

Inactivating Key Original & Copy



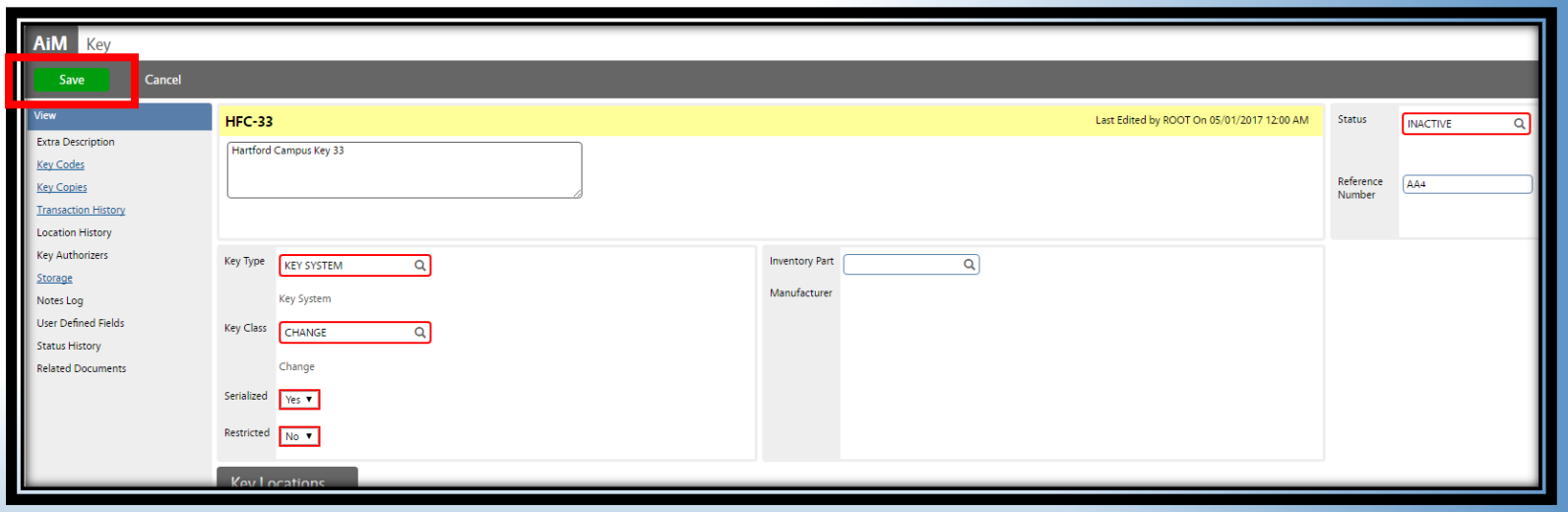
Click Status

Inactivating Key Original & Copy

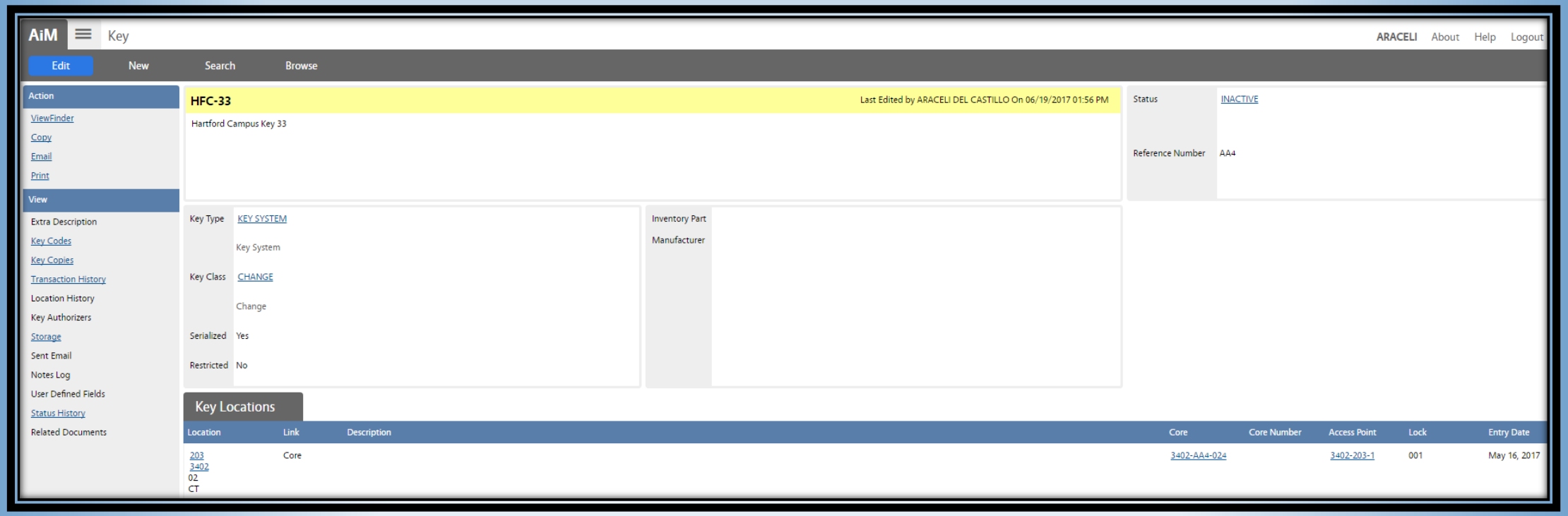


Click Inactive

Click ***Save***



Inactivating Key Original & Copy



Inactivating Key Original & Copy