Saflok
by Kaba

SAM® RF
Operations Manual

Section 7:
Reports

Section 7: Reports and Maintenance

7.1 SAM RF System Reports – Common Functions

The SAM RF System provides a high degree of security by allowing you to reprogram (rather than completely change out) locks as well as electronically program keys and locks. In addition, SAM provides a number of reports to help you monitor activities around your property. Information about the reports and how to access them follows the list of available reports below.

- Unit key history report
- User key history report
- Keys made report
- Lock audit report
- Limited use key audits report
- Transactions report

Note: In order to generate reports on the SAM RF System, a printer must be assigned to the computer.

Because SAM RF System reports have many similar functions, rather than describe each function repeatedly when discussing each report, the most common report functions are discussed in this section.

Selecting a Date Range
Almost all SAM RF System reports allow you to select a range of dates for the report desired. The default settings provide a time range of just one day. There are several options for changing the date range.

1. Click on the large down arrow (▼) next to **Beginning Date** or **Ending Date** to display the date range calendar.

    The double arrow buttons (◄◄ ►►) will change the date range from year to year, while the single arrow buttons (◄ ►) will change the date range from month to month.

    There are also four buttons near the bottom of the calendar that allow you to quickly clear the date, choose the current date and accept or cancel the settings.

2. Click on a specific day in the date range calendar. This will automatically enter the desired numbers into the **Beginning Date** field.

3. Once you have opened up a date range calendar, small up/down arrows appear right next to the date. These buttons allow you to quickly change the month field; clicking the up arrow moves the date up a month, while clicking the down arrow moves the date back a month.

4. Highlight over the individual number field (month/day/year) you wish to change and type in the desired number(s).

Section 7: Reports and Maintenance

SAM RF System Reports – Common Functions (continued)

Previewing Reports

Once you have selected the date range – along with any other necessary settings – for a desired report, your next step will be to click the **View Report** button located at the bottom of a report PC dialog box. This will display the Output Options PC dialog box.
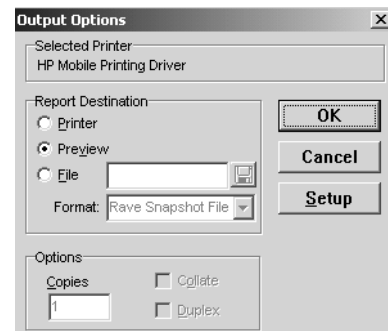
At the top of the Output Options PC dialog box, your default printer will be listed. Beneath that will be a **Report Destination** box, along with three options:

- **Printer:** To print the report out as hard copy
- **Preview:** To view the report on screen
- **File:** To save the report to your hard drive or to disk.

Although you have the option to print or to save the report to file, it is recommended that you first preview the report on screen. You will once again have the option to print or save from the preview screen.

To view the report on screen, confirm that the **Preview** option is selected and click **OK**. Within a few moments, the Report Preview PC dialog box will open up in a new window that you can maximize or minimize like any Windows-based window.

If there are several pages to the report, the preview screen provides tools for going from one page to another using either the buttons at the top of the box or the **Page** pull-down menu. There are also options for zooming in or zooming out of the report using either the **Zoom** box or the **Zoom** pull-down menu.
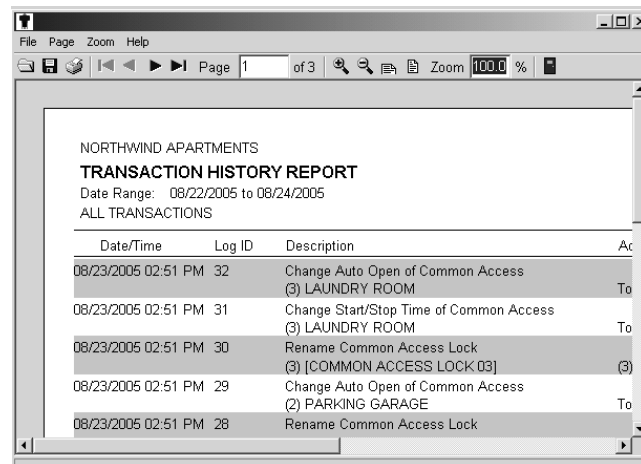
The **File** menu provides options for saving the report, opening another report or for printing the report to your default printer. To exit the preview screen, go to the **File** menu and click **Exit**. This will return you to the **Report** PC dialog box that you started with. Click **Close** to return to the SAM RF System main menu screen.
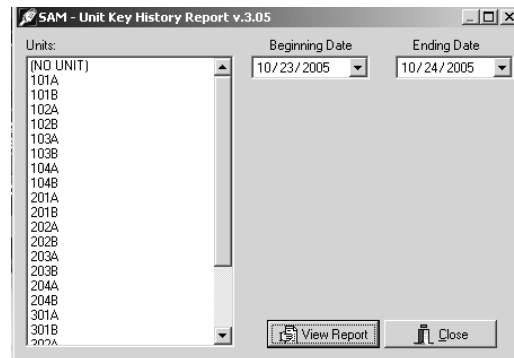
Section 7: Reports and Maintenance

7.2 Unit Key History Report

The unit key history report provides data on any keys created during a specified date range that would open a specific unit lock. This would include any Resident keys, Master keys, and Zone keys.

1. To view this information, click on the **Reports** menu at the top of the window or the **Reports** icon.

2. Click on **Unit Key History…**

3. In the Unit Key History Report PC dialog box, you can view the key history of any of the units on your property for any range of time.

4. To choose a unit, simply find it in the **Units** list box and click on it. (You may have to scroll down to see all of the units listed.)

5. Once you have chosen a unit, select the date range. For instructions on choosing a date range, see Section 7.1.

6. When you are satisfied with the settings (i.e., you have chosen the right date range for the desired unit), click the **View Report** button at the bottom of the box. This will display the Output Options PC dialog box again.

Section 7: Reports and Maintenance

Unit Key History Report (continued)

7. To view the unit key history report on screen, confirm that the **Preview** option is selected and click **OK**. Within a few moments, the Unit Key History Report Preview PC dialog box will appear.

The unit key history report lists the date range requested, the specific unit number and its zone (if any). In addition, the report displays the following information:

- **Date/Time:** When the key was created for the unit.
- **Key Type:** Whether resident key, master key or zone key, limited use key, programming key, etc.
- **Key User ID/Name:** The key level (e.g., "R" for Resident) and the number assigned to that particular key in the database are shown, followed by the person to whom the key was assigned.
- **Operator ID/Name:** The person who made the key (or the person who was logged on to the system when the key was made).
- **Status:** Whether the key is current; expired (a specific expiration date had been assigned and is now past); old (a newer key has invalidated it); canceled (the key was intentionally inhibited by creating an inhibit key); or returned (the key was erased after being read).

Section 7: Reports and Maintenance

7.3 User Key History Report

The user key history report provides data on any keys created during a specified date range for a specific individual. This would include any Resident keys, Master or Zone keys, as well as Programming keys, Construction keys, etc.

1. To view this information, click on the **Reports** menu at the top of the window or the **Reports** icon.

2. Click on **User Key History…**

3. In the User Key History Report PC dialog box, you can choose to view the key history of any individual who has ever been assigned a key.

4. To narrow the list of users, you can go to the **User Types** pull-down box and choose from **All Users, Resident**, **Staff,** or **Vendor**.

5. Once you have chosen a user category, simply find the individual user in the **Users** box and click on it. (You may have to scroll down to see all of the users listed.)
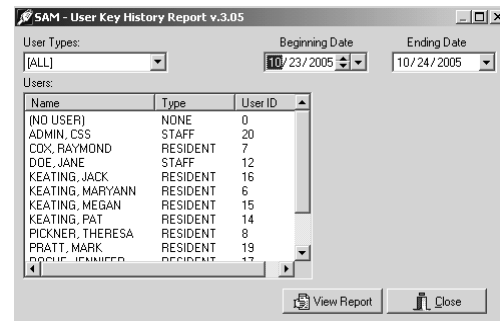
6. The last step is to select a date range. For instructions on choosing a date range, see Section 7.1.

7. When you are satisfied with the settings (i.e., you have chosen the right date range for the specific user), click the **View Report** button. This will display the Output Options PC dialog box.

Section 7: Reports and Maintenance

User Key History Report (continued)

To view the user key history report on screen, confirm that the **Preview** option is selected and click **OK**. Within a few moments, the User Key History Report Preview PC dialog box will appear.

The user key history report lists the date range requested along with the specific user. In addition, the report displays the following information:

- **Date/Time:** When the key was created for the unit.
- **Key Type:** Whether Resident key, Master key or Zone key, Limited Use key, Programming key, etc.
- **Unit/Zone/Common Access:** What specific locks the key will open. (Because *Master keys* open all locks, none will be specifically listed.)
- **Operator ID/Name:** The number in the database assigned to the person who made the key (or the person who was logged on to the system when the key was made) and the name of that person.
- **Status:** Whether the key is current; expired (a specific expiration date had been assigned and is now past); old (a newer key has invalidated it); canceled (the key was intentionally inhibited by creating an inhibit key); or returned (the key was erased after being read).

Section 7: Reports and Maintenance

7.4 Keys Made Report

The keys made report provides data on any keys created during a specified date range based on user, key type, and/or status.

1. To view this information, click on the **Reports** menu at the top of the window or the **Reports** icon.

2. Click on **Keys Made...**
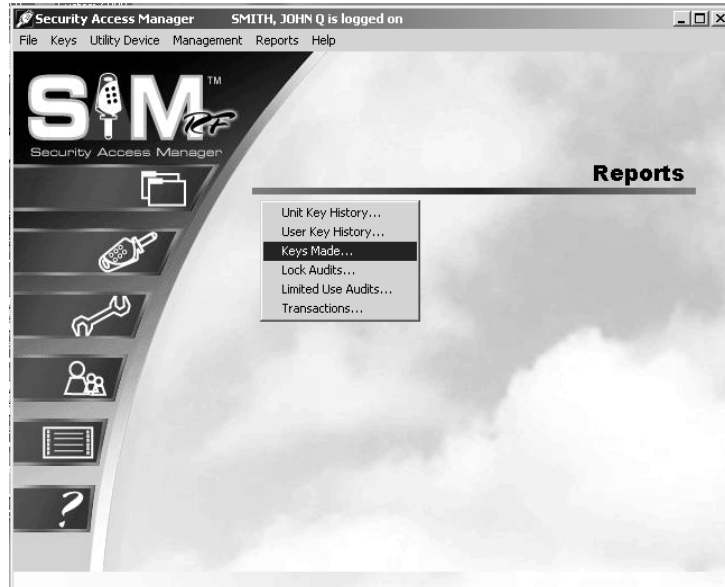
3. In the Keys Made Report PC dialog box, you can choose from many combinations of criteria based on user type, key type, key status, and date range.

    Note: The keys made report allows you to choose all or any group of users (staff, resident, or vendor), as opposed to the user key history report, which only reports on one individual user at a time.
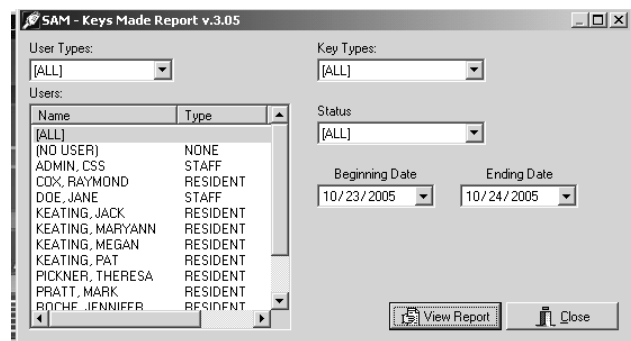
4. The next step is to select a date range. For instructions on choosing a date range, see Section 7.1.

5. Once you have chosen the specific criteria and are satisfied with the settings for this report, click the **View Report** button. This will display the Output Options PC dialog box.

Section 7: Reports and Maintenance

Keys Made Report (continued)

6. To view the keys made report on screen, confirm that the **Preview** option is selected and click **OK**. Within a few moments, the Keys Made Report Preview PC dialog box will appear.

The keys made report lists the date range requested along with the following information:

- **Date/Time:** When the key was created for the unit.
- **Key Type:** Whether Resident key, Master key or Zone key, Limited Use key, Programming key, etc.
- **Key User ID/Name:** The key level (e.g., "R" for Resident) and the number assigned to that particular key in the database are shown, followed by the person to whom the key was assigned.
- **Unit/Zone:** What specific locks the key will open. (Because *Master keys* open all locks, none will be specifically listed,)
- **Operator ID/Name:** The person who made the key (or the person who was logged on to the system when the key was made).
- **Status:** Whether the key is current; expired (a specific expiration date had been assigned and is now past); old (a newer key has invalidated it); canceled (the key was intentionally inhibited by creating an inhibit key); or returned (the key was erased after being read).

Section 7: Reports and Maintenance

7.5 Auditing Locks

Auditing a lock refers to retrieving information saved in the lock and uploading that information to the SAM RF System. This information, also known as the audit trail, shows which keys have been used to gain access, along with the time and date that each key was used. You will want to audit a lock to verify key entries and maintain security.

Note: You can audit up to three unit locks or one common area lock at a time.

Note: Your report will show the last 200 transactions for unit locks and the last 100 transactions for suite locks.

1.   Be sure that the PC is turned on, the electronic key encoder device is plugged in an electrical outlet and the USB cable between them is properly attached (see Section 2.5 "Installing the Key Encoder and Utility Device").

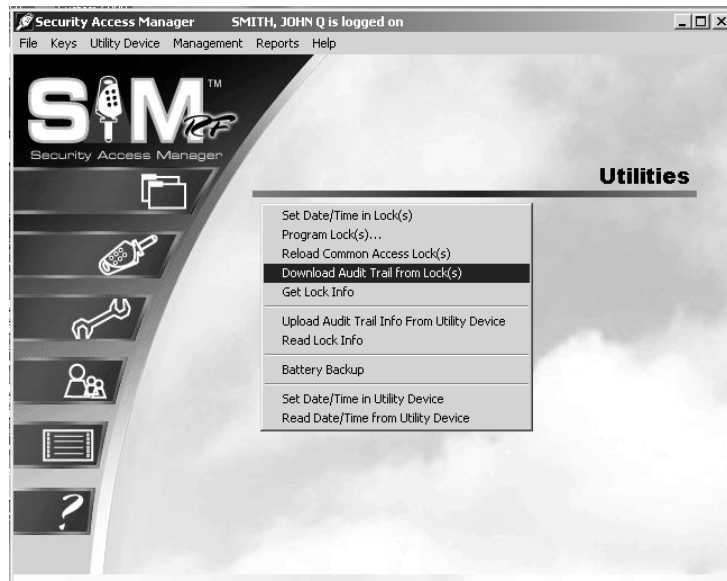**Note:** The utility device should never be exposed to wet conditions.

2.   Click on the **Utilities** menu at the top of the window or the **Utilities** icon.

3.   Click on **Download Audit Trail from Lock(s).**

Note: You must keep all USB cables connected between the electronic key encoder base, the utility device and the PC while the key image spins on the PC screen.


4.   The PC dialog box will display, "The write operation was successful!" Click **OK.**

5.   Disconnect the USB cable located on the back left hand side of the electronic key encoder base. The USB cable must remain attached to the top of the utility device.

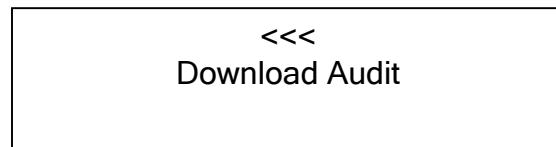6.   Remove the utility device with the USB cable attached and take it to the lock.

## Section 7: Reports and Maintenance

Auditing Locks (continued)

7. Connect the USB cable on the utility device to the lock's receptive port located underneath the bottom of the lock. You will need to remove the rubber cover on the lock's receptive port to insert the USB cable. Be sure the connectors of the USB cable and the lock's receptive port match up.
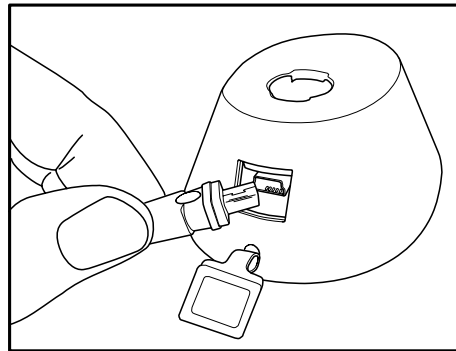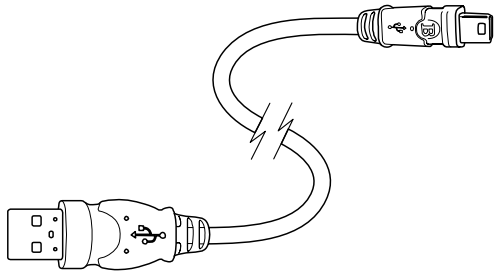
8. The download process will take several moments, during which time the utility device screen will display the message "<<< Download Audit" and beep every few seconds.

```
        <<<
   Download Audit
```

9. The utility device screen will display the message "OPERATION COMPLETED REMOVE DEVICE NOW Download Audit." You will hear two beeps. The lock's audit trail has been retrieved. Remove the USB cable from the lock. Replace the rubber cover on the lock's receptive port.

```
OPERATION COMPLETED
REMOVE DEVICE NOW

   Download Audit
```
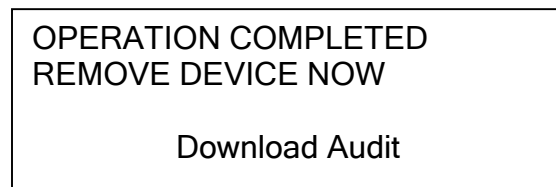
10. You may continue downloading audit trails by inserting the USB cable attached to the utility device into the locks you wish to audit.

Note: You can download audit trails for up to three unit locks or one common area lock. You will need to return the utility device to the PC and reprogram it in order to continue auditing the next lock(s).

11. When you have finished, bring the utility device with the attached USB cable to the electronic key encoder base and your PC.

12. Be sure that the PC is turned on, the electronic key encoder device is plugged in an electrical outlet and the USB cable between them is properly attached (see Section 2.5 "Installing the Key Encoder and Utility Device").
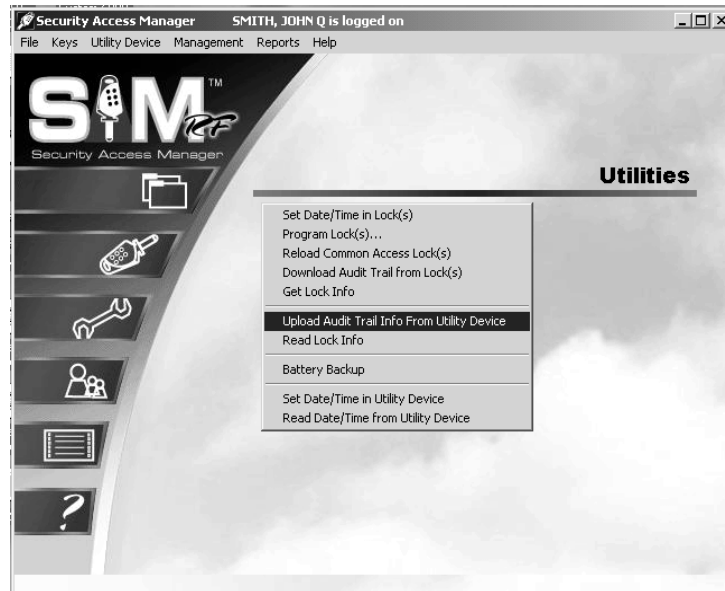
Section 7: Reports and Maintenance

Auditing Locks (continued)

13. Click on the **Utilities** menu at the top of the window or the **Utilities** icon.

14. Click on **Upload Audit Trail from Lock(s).**

Note: You must keep all USB cables connected between the electronic key encoder base, the utility device and the PC while the key image spins on the PC screen.

15. At the Confirmation Requested PC dialog box, click **Yes** to save these audit records for later viewing.

16. The PC screen will display a Success PC dialog box to let you know that the audits were successfully saved. Click **OK**.
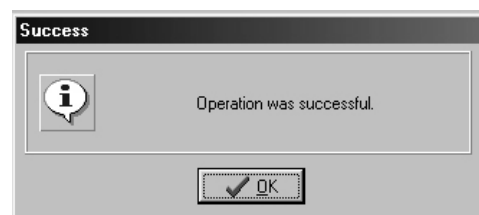
Section 7: Reports and Maintenance

Auditing Locks (continued)

17. Click on the **Reports** menu at the top of the window or the **Reports** icon.

18. Click on **Lock Audits…**

19. To view a report, click on the desired report and click **View Report**.

Reports will be listed in chronological order, according to when the reports were created, with the most recently created report appearing at the bottom of the list. Also displayed are the names of the locks audited (such as Pool or Unit 101), the lock type and the time/date of the audit. If you performed several lock audits on the same day, you can find the desired report using one of these other criteria.

Section 7: Reports and Maintenance

Auditing Locks (continued)

20. At the top of the Output Options PC dialog box, your default printer will be listed. Beneath that will be a **Report Destination** box, along with three options:

    - **Printer:** To print the report out as hard copy
    - **Preview:** To view the report on screen
    - **File:** To save the report to your hard drive or to disk.

Note: In order to generate reports on the SAM RF System, a printer must be assigned to the computer.

21. To view the report on screen, confirm that the **Preview** option is selected. Click **OK.**

Within a few moments, the **Lock Audit Report** will open a new window that you can maximize or minimize like any Windows-based program.

The lock audit report displays the name of the lock you audited (such as Pool or Unit 101), the type of lock and the time the report was generated. In addition, the report will display the date and time the lock was audited, how it was audited and the number of transactions (the number of times any activity took place, such as a key being inserted or the lock being programmed).

The lock audit report then displays a list of the last transactions with details about what took place at the lock. For instance, if a key was inserted, the report shows the type of key, whose key it was and the actual time the key was inserted. Reviewing this report can provide valuable information about any suspicious activity related to that lock.

If there are several pages to the report, the lock audit report provides tools for going from one page to another using either the buttons at the top of the box or via the **Page** menu. There are also options for zooming in or zooming out of the report using either the **Zoom** box or the **Zoom** menu.

22. To exit the lock audit report, point to the **File** menu and click **Exit**. This will return you to the **SAM RF** Lock Audit Report PC dialog box. Click **Close** to return to the SAM RF System main menu screen.

Section 7: Reports and Maintenance

7.6 Limited Use Audits Report

The Limited Use Audits Report provides information on any or all Limited Use, or Vendor, keys created. Limited Use Audits reports will be listed in chronological order according to when the limited use keys were created, with the most recently created key appearing at the bottom of the list. This report also displays the person the key was assigned to and his or her user type (staff or vendor), along with a listing of the locks to which the key provided access. This report displays the last 40 lock transactions, including both authorized and unauthorized transactions.

1. To view this information, click on the **Reports** menu at the top of the window or the **Reports** icon.

2. Click on **Limited Use Audits.**

At the Limited Use Key Report PC dialog box, a list of the Limited Use keys appears in the order that they were made. Note that the most recently created key appears at the bottom of the list.

This PC dialog box also displays the person the key was assigned to and his or her user type (staff or vendor) along with a listing of the locks to which the key provided access.

3. To view the limited use key audits report for any of the keys listed, simply click on the desired report and click **View Report**. This will display the Output Options PC dialog box.

Section 7: Reports and Maintenance

Limited Use Key Audits Report (continued)

4.   Confirm that the **Preview** option is selected and click **OK**. Within a few moments, the Limited Use Key Report Preview screen will appear.
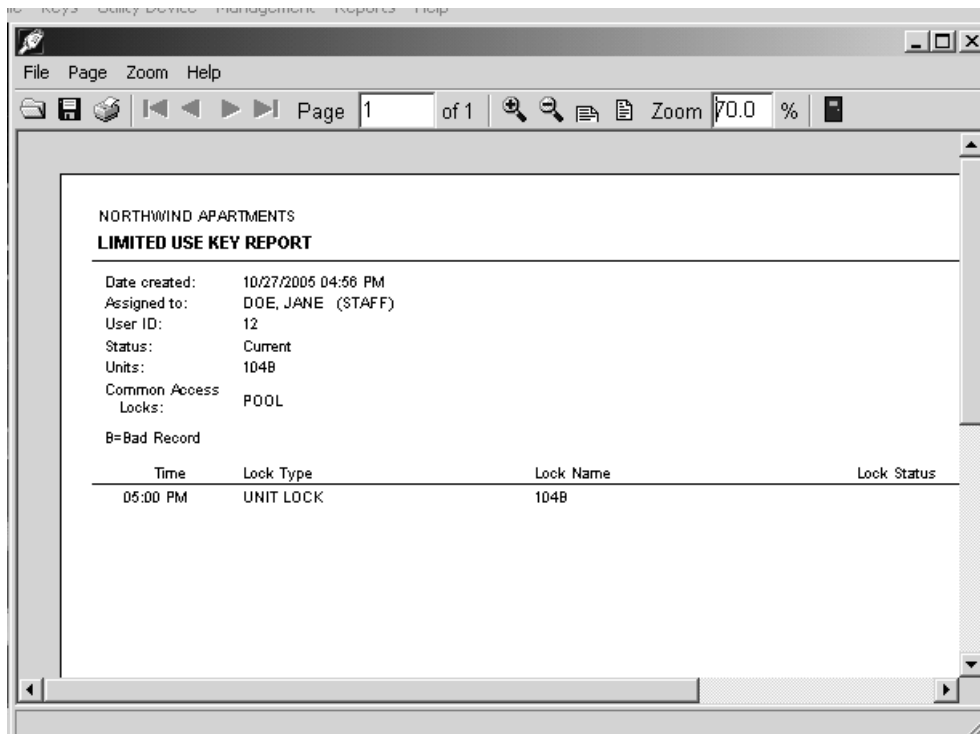
The Limited Use Key report displays the date the key was created, who it was assigned to, the user ID, status, and the units and common access locks the key was made to access. At the bottom of the report there will be a list of the time, lock type, lock name, and status of all the locks in which the Limited Use Key was used.

5.   When you have finished viewing the report click **File** and **Close**.
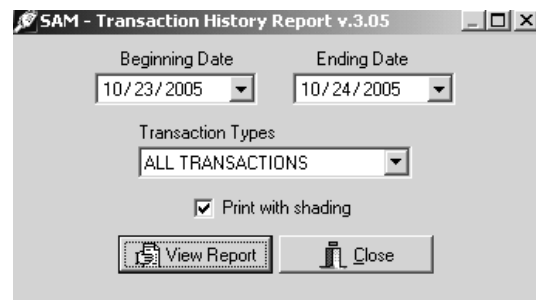
Section 7: Reports and Maintenance

7.7 Transactions Report

The term "transactions" refers to any action taken with the SAM RF System, both keying transactions (such as when new keys are made) and non-keying transactions (such as when a new resident or staff member is added to the system).

1. To view a transaction history report, click on the **Reports** menu at the top of the window or the **Reports** icon.

2. Click on **Transactions.**

3. For the transaction history report, you can choose to view **All Transactions** within a given date range, all **Keying Transactions**, or all **Non-Keying Transactions** for a specific date range. For instructions on choosing a date range, see "Selecting a Date Range" at the beginning of this section.

4. Once you have chosen the specific criteria and are satisfied with the settings for this report, click the **View Report** button. This will display the Output Options PC dialog box.

Section 7: Reports and Maintenance

Transactions Report (continued)

5. To view the report on screen, confirm that the **Preview** option is selected and click **OK**. Within a few moments, the Transaction History Report Preview PC dialog box will appear.

The transaction history report displays the following information:

*   **Date/Time** of the transaction.
*   **Log ID:** The identifying number for the transaction.
*   A short **Description** of the transaction, such as "Make Key" or "Add Resident," and the key type.
*   Any available **Additional Data** about the transaction, such as the unit number a key is made for or the name of the resident that was added.
*   **Operator:** The person who performed the transaction (or the person who was logged on to the system when the transaction was performed).