

Key Management in Mercury

Hi there! Welcome to the new guide for our key management process. Say goodbye to SharePoint and hello Mercury!

Please navigate through this step by step guide to check out, return, and track keys.

On your Home menu, click on Key Management > **1. 🔑 ✓ -Out**. From this list you can search by:

- Name;
- Perm Number;
- U-Mail;
- or Living Area.

Key Management

1. 🔑 ✓ -Out

2. 🔑 ✓ -In (List of 🔑 Out)

All 🔑 Records

Re 🔑 Needed

Submit 🔑 Request (Res Ops)

If you want to display all residents, simply click on Show Me List.

Search Options

First (Preferred) Name UCSB Perm#

Last Name U-Mail

Living Area On Date

Advanced Selection

Sort by

Show Me List Reset List

Cancel

Next

After you have located the person you want to check out a key to, click on the [Check Out Key] button.

Search Options

First (Preferred) Name UCSB Perm#
 Last Name U-Mail
 Living Area On Date
 Advanced Selection
 Sort by
 Show Me List Reset List

Actions for selected Export list

<input type="checkbox"/> Actions	Building	Bed Space	UCSB Perm#	Last Name	First (Preferred) Name	Move In	Move Out
<input type="checkbox"/> Check Out Key View Profile	San Clemente Villages	SCV-5106A	10072016	TEST-Lehman	TEST-KRISTINE	1/3/2021	6/14/2021

Enter the key checked out date/time, key checked out by, key type, key number, temporary relocation (and space if applicable), reason key issued, and key tag number and notes fields. Click the [Finish] button at the bottom of the window.

Check Out Key(s) to Resident

Key Checked Out Date/Time *
 Key Checked Out By *
 Key Type: *
 Key Number(s)
 Temporary Relocation *
 Temporary Relocation Space
 Reason Key Issued *
 Key Tag Number and Notes

When the resident returns the key, click on **2. ✓ -In (List of Out)** under the Key Management section.

Key Management

- ✓ -Out
- ✓ -In (List of Out)

All Records

Re Needed
Submit Request (Res Ops)

You will see 2 parameter fields - Building Name Contains and UCSB Perm # Contains. These fields can be used to narrow down the list by building or perm number if you do not want to see all of the keys that are currently loaned out.

If you want to see a list of all of the keys loaned out, click on the [Run Operation] button.

All Keys Currently Out

Building Name Contains:

UCSB Perm # Contains:

Run Operation

Click on the [Return Key] button. In the pop-up box, enter key checked in date/time and key checked in by fields. Click on the [Finish] button to record that the key has been checked back in.

Note: You can click on the small key icon to the right of the [Return Key] button to automatically date/time stamp the key checked in date/time field on the pop-up. You will need to click the icon first and then open the [Return Key] form. Additionally, you will need to fill out the key checked in by field for the record to drop off the All Keys Currently Out list.

Staff may also send an email to the resident using the small blue envelope icon. Admin Professional staff will be able to bill the resident using the small green calculator icon.

All Keys Currently Out

[+ Change Settings](#)

[Actions for selected](#) [Export](#)

<input type="checkbox"/> Actions	UCSB Perm #	First (Preferred) Name	Last Name	Bed Space
<input type="checkbox"/> Return Key <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> Update Record	10072016	TEST-KRISTINE	TEST-Lehman	SCV-5106A

Key Return

Key Checked In Date/Time: *

Key Checked In By:

Key Number(s):

Key Tag Number and Notes:

Create Date: 2/11/2021 3:25:02 PM

Last Update Date: 2/11/2021 3:25:02 PM

Created By: klehman

Last Updated By: klehman

Cancel

Finish