Mortise Lock Installation Instructions

TOOLS REQUIRED

1. Pencil
2. No. 2 and No. 3 Phillips Head Screwdrivers
3. No. 1 and No. 2 Slotted Screwdrivers
4. 1/8" Allen Head Wrench
5. 3/4" Wood Chisel or Corner Chisel
6. Measuring Device
7. Lock Mortising Tool (Recommended)
8. Router and Lock Face Template
9. Combination Square
10. Awl
11. Hacksaw
12. File (Wood Rasp and Metal)
13. Baldwin Aligning Tool
15. Screw Wax or Soap
16. Powder Chalk, Graphite or Lipstick

Note: In order to successfully install a mortise lock and trim, a minimum of average skill level is required with use of the above listed tools.

Read and understand the provided instructions BEFORE attempting to mark or cut the door and/or frame. If there are any questions before you begin the installation, phone or visit your nearest Baldwin Distributor or contact the Technical Service Department at Baldwin at 610.777.7811.

Diagram A

Diagram B
Mark the door at 37-1/2” - 40” above finished floor, or if retrofit, at appropriate location to coordinate with existing strike preparations. This will be center line of the lock and will put the knob/lever at 36” - 39” above the floor.

Make sure that the door stile will accommodate the intended lock.

Mortise the pocket in the door 1/8” deeper than the lock being installed. Refer to the Installation Template Guide Chart (blue sheet) for exact size of mortise pocket.

**Mortise Lock Handleset Installation Instructions**

1. Mark the Door
2. Double Check Compatibility of Door Stile & Trim
3. Determine Hole Pattern Required for Trim on Blue Sheet
4. Mortise Lock Pocket For Lock Body
5A. Prepare for Lock Front
5B. Prepare for Lock Front

**GENERAL NOTES**

Paper template is designed for 1-3/4” thick doors. For extra thick doors, measure backset from center of door edge. Tape supplied template to the door to locate fastener pattern for lock and trim.

When installing hardware on metal or fiberglass doors, ensure the door was designed to accommodate mortise locks. If in doubt, check with your local door distributor or door manufacturer.

Removal of hardware from doors is recommended before painting and finishing of the door. Allow paint/stain to fully cure before reinstalling hardware, usually ten days to two weeks. Check paint manufacturer instructions.

Retain these instructions in a safe place should you need to disassemble the lock trim or require Baldwin’s assistance.

**DOOR CONDITIONS**

- **Left Hand**
  - Reverse Bevel
  - Outside
- **Right Hand**
  - Reverse Bevel
  - Outside

**HAND OF DOOR IS ALWAYS DETERMINED FROM THE OUTSIDE**

Here are some rules to follow:
- The outside of an exterior door is the street or entrance side.
- The outside of a room is the hall side.
- The outside of a single communicating door is the side from which the hinges are not visible when the door is closed.
- The outside of a closet door is the room or hall side.

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For 1-3/4” doors, fold the yellow lock template and attach to door using Installation Template Guide. Mark door at appropriate locations for lock and trim. MARK APPROPRIATE BACKSET. (Extra thick door conditions, see General Notes.) Metal template 8498.000 is available for purchase.

Cut the relief pockets 3/8” deep on both sides for the Latch Hinge, 2-1/2” and 2-3/4” backset only. (Does not apply for 1” front.)

For 1-3/4” doors, drill appropriate holes as indicated on yellow lock template. DO NOT OVERSIZE HOLES. Only top two holes are drilled for knob to knob and lever to lever sets.

Mark door drill holes. Drill appropriate holes as indicated on yellow lock template. DO NOT OVERSIZE HOLES. Only top two holes are drilled for knob to knob and lever to lever sets.

Install cylinder plug. Thread the cylinder plug into interior side of lock. Place a strip of tape over plug to keep it from turning. Notch must be located as shown. (Double cylinder functions: OMIT THIS STEP.)

Install lock. Drill two pilot holes for the lock face, adjust the bevel and install the lock. Shim between the lock and door on cylinder side as shown to prohibit the cylinder from pulling the lock case off center. (Failure to shim the lock may cause the cylinder to sit unevenly on the surface of the trim.)

Insert spindle. For handleset trim install the spindle from the inside with V groove facing bottom door hinge and thread the screw and lock washer into the spindle from the outside. Tighten securely. For knob to knob and lever to lever sets, install spindle from outside - go to step 13.

Size thumbpiece. Cut the thumbpiece so that it will fully engage the lift lever on the bottom of the lock.

Install cylinder. Place the cylinder through the trim. Partially insert key into cylinder. Thread the cylinder into the lock until it is against the trim and Baldwin name is horizontal. For knob to knob and lever to lever sets - Install aligning bushing and fasten trim with supplied screws. Remove bushing - go to step 16.

Install thru-bolts. Start the thru-bolts which will hold the exterior trim. (Use screw cover washer under the bottom thru-bolt.) Tighten both securely.
15. **Size & Cut Thumbturn**

Cut the thumbturn tailpiece so that it goes halfway through the lock (as in step 12).

16. **Install Interior Trim**

Place the interior trim on the door. Slide the aligning bushing onto the spindle so it fits into the knob hole. Drill pilot holes and fasten interior trim with supplied fasteners. Remove bushing and discard.

17. **Complete Trim Installation**

Start the set screw before sliding the knob or lever onto the spindle. Slide knob or lever onto the spindle and tighten securely. For knob to knob and lever to lever sets - install both sides - go to step 19.

18. **Install Screw Cover**

Thread decorative screw cover onto threaded washer.

19. **Tighten Cylinder Set Screw**

Tighten the cylinder set screw by turning clockwise. Do not over tighten. Do not use a power screwdriver.

20. **Install Armor Front**

Install the armor front with the small phillips head screws supplied.

21. **Mark and Mortise Jamb for Strike Location**

Mark the Jamb for the proper strike location. Coat extended latch bolt with graphite, powdered chalk or lipstick. Retract the bolt, close the door and actuate the knob or lever several times to mark the jamb. Add approximately 1/32” clearance from that mark.

22. **Install Dust Box & Security Strike**

Drill pilot holes for security strike and relief holes for finished strike. Install dust box and security strike with 1” and 3” screws on the stop side of the plate. Note: Security Strikes are supplied only with locks which utilize cylinders.

23. **Install Strike Plate**

Install strike plate with supplied machine screws.

* APPLY ANY WEATHERSTRIPPING BEFORE STRIKE HAS BEEN INSTALLED.