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## How to Update Keyholder Groups Via the Cougar Portal

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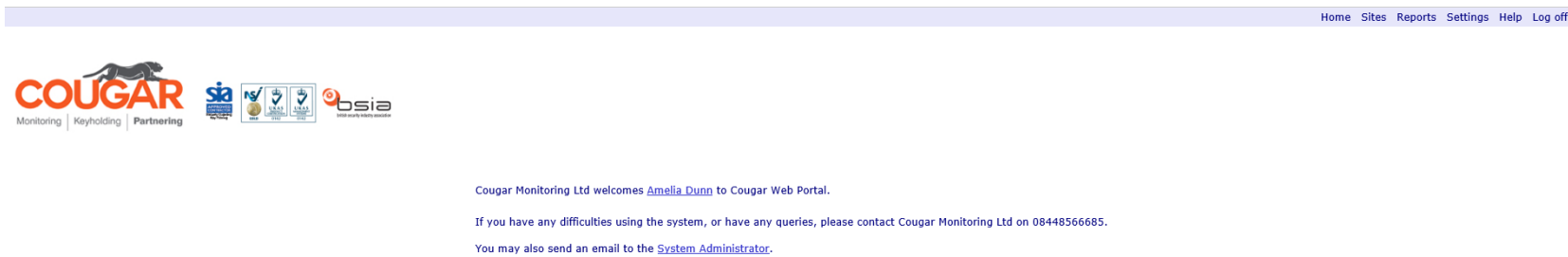
Last updated on March 15th 2021  
Author – Amelia Dunn

## How To Update Keyholder Groups Via The Cougar Portal

Please refer to the Portal Training Guide for KH Availability if you are unfamiliar with updating Key Holder information.

You need to log into the **Portal** using your own **Credentials**. If you are unsure what these are or require a reset please email **Arc@CougarMonitoring.com**. Please provide your current information if a reset is required.

Once you have logged into the **Portal** you will be met with this screen:



**Please Note** – Depending on your access level you may find your view of the Portal and the tabs available is slightly different, you may have less options or only be able to read certain sections of the account. If you require access to a part of the Portal that is currently inaccessible to you please email **Arc@CougarMonitoring.com** for assistance.

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**Portal Training Guide –  
Updating Key Holder Groups.**



Navigate to **Sites** at the top right, on the drop-down menu select **Search (ALT+S)**.

**Site Search**

Contract Number  Contains

Is Commissioned  Templates Only

Records : 0 to 0 of 0 (Maximum record limit is 1000)

Search

<< < 1 of 1 > >>

Contract Number	Site Name	Address
Export To File		

Enter the **Contract Number** for the site you are going to be updating and click **Search**.

This will bring up a list of the sites that match the information you have input:

**Site Search**

Contract Number  Contains  1000797

Is Commissioned  Templates Only

Records : 1 to 1 of 1 (Maximum record limit is 1000)

Search

<< < 1 of 1 > >>

Contract Number	Site Name	Address
<a href="#">1000797</a>	Training Test	Dummy, B65 5NA
Export To File		

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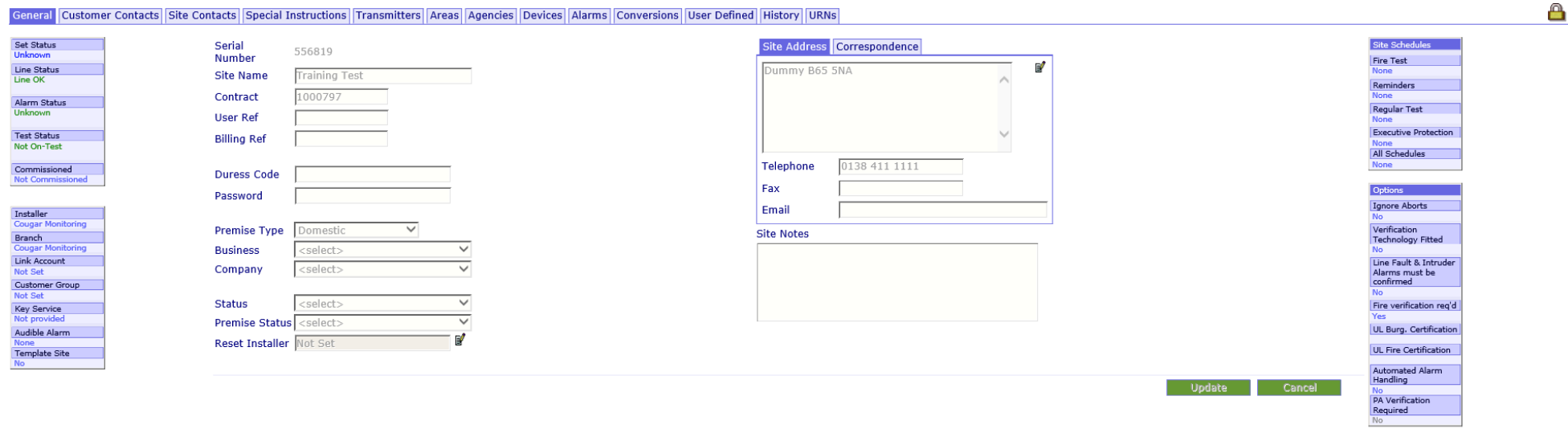
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Portal Training Guide –  
Updating Key Holder Groups.

Click on the **Contract Number** that you are wanting to update and it will bring up the following screen:



The screenshot shows a web interface with a top navigation bar containing tabs: General, Customer Contacts, Site Contacts, Special Instructions, Transmitters, Areas, Agencies, Devices, Alarms, Conversions, User Defined, History, URNs. A lock icon is visible in the top right corner.

On the left side, there are several vertical lists of status options:

- Set Status:** Unknown
- Line Status:** Line OK
- Alarm Status:** Unknown
- Test Status:** Not On-Test
- Commissioned:** Not Commissioned
- Installer:** Cougar Monitoring
- Branch:** Cougar Monitoring
- Link Account:** Not Set
- Customer Group:** Not Set
- Key Service:** Not provided
- Audible Alarm:** None
- Template Site:** No

The main content area displays account details for 'Training Test':

- Serial Number: 556819
- Site Name: Training Test
- Contract: 1000797
- User Ref: [Empty]
- Billing Ref: [Empty]
- Duress Code: [Empty]
- Password: [Empty]
- Premise Type: Domestic
- Business: <select>
- Company: <select>
- Status: <select>
- Premise Status: <select>
- Reset Installer: Not Set

On the right side, there are two panels:

- Site Address / Correspondence:** Dummy B65 5NA. Includes fields for Telephone (0138 411 1111), Fax, and Email.
- Site Schedules:** Fire Test (None), Reminders (None), Regular Test (None), Executive Protection (None), All Schedules (None).
- Options:** Ignore Aborts (No), Verification Technology Fitted (No), Line Fault & Intruder Alarms must be confirmed (No), Fire verification req'd (Yes), UL Burg. Certification, UL Fire Certification, Automated Alarm Handling (No), PA Verification Required (No).

At the bottom right, there are 'Update' and 'Cancel' buttons.

From this screen you will be able to see all the information that is currently set up for the account.

For this training guide we will be focusing on updating multiple **Key Holder Groups**.

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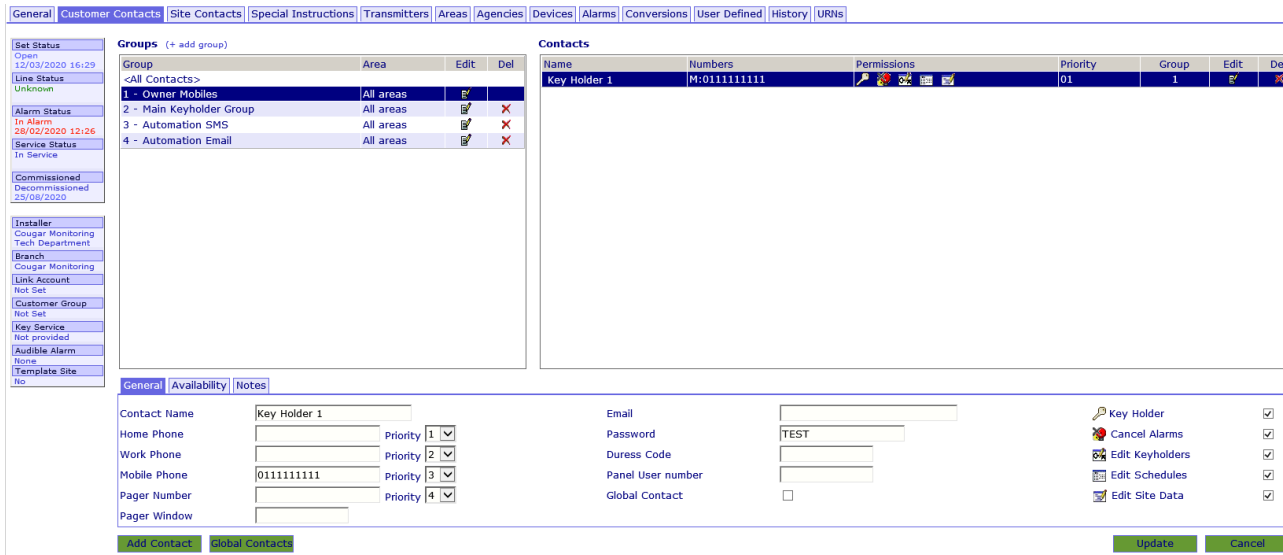
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## Portal Training Guide – Updating Key Holder Groups.

Navigate to the **Customer Contacts** Tab:



As you can see there are currently 4 **Groups** set up:

1. **Owner Mobiles** – This group is purely for the Owners Mobile numbers to be input.
2. **Main Keyholder Group** – This group is where you keep the keyholders who are not the Site Owners.
3. **Automation SMS** – This group will contain the Owner Mobiles and any relevant Key Holders who are to be contacted via SMS.
4. **Automation Email** – This group contains any email addresses for the Site / Installer that are set up to receive automated emails regarding signals.

*(Please be aware that the groups you see may differ slightly depending on your Protocols. Please contact [ARC@CougarMonitoring.com](mailto:ARC@CougarMonitoring.com) for further information.)*

Above these groups you will see **<All Contacts>** this will show you all the contacts that are currently set up for an account, including any that are not currently assigned to a **Group**. This is where you are able to assign your **Keyholders** into the relevant **Groups**:

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Portal Training Guide –  
Updating Key Holder Groups.

General | **Customer Contacts** | Site Contacts | Special Instructions | Transmitters | Areas | Agencies | Devices | Alarms | Conversions | User Defined | History | URNs

Set Status	Groups (+ add group)	Contacts																																										
Open 12/03/2020 16:29	<table border="1"> <thead> <tr> <th>Group</th> <th>Area</th> <th>Edit</th> <th>Del</th> </tr> </thead> <tbody> <tr> <td>&lt;All Contacts&gt;</td> <td></td> <td></td> <td></td> </tr> <tr> <td>1 - Owner Mobiles</td> <td>All areas</td> <td></td> <td></td> </tr> <tr> <td>2 - Main Keyholder Group</td> <td>All areas</td> <td></td> <td></td> </tr> <tr> <td>3 - Automation SMS</td> <td>All areas</td> <td></td> <td></td> </tr> <tr> <td>4 - Automation Email</td> <td>All areas</td> <td></td> <td></td> </tr> </tbody> </table>	Group	Area	Edit	Del	<All Contacts>				1 - Owner Mobiles	All areas			2 - Main Keyholder Group	All areas			3 - Automation SMS	All areas			4 - Automation Email	All areas			<table border="1"> <thead> <tr> <th>Name</th> <th>Numbers</th> <th>Permissions</th> <th>Group</th> <th>Edit</th> <th>Del</th> </tr> </thead> <tbody> <tr> <td>Keyholder 1</td> <td>T:0222 222 2222</td> <td> </td> <td></td> <td></td> <td></td> </tr> <tr> <td>Owner Mobiles</td> <td>M:0111111111</td> <td> </td> <td></td> <td></td> <td></td> </tr> </tbody> </table>	Name	Numbers	Permissions	Group	Edit	Del	Keyholder 1	T:0222 222 2222					Owner Mobiles	M:0111111111				
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Owner Mobiles	M:0111111111																																											
<b>Alarm Status</b> In Alarm 28/02/2020 12:26 <b>Service Status</b> In Service <b>Commissioned</b> Decommissioned 25/08/2020 <b>Installer</b> Cougar Monitoring Tech Department <b>Branch</b> Cougar Monitoring <b>Link Account</b> Not Set <b>Customer Group</b> Not Set <b>Key Service</b> Not provided <b>Audible Alarm</b> None <b>Template Site</b> No	General   Availability   Notes Contact Name: [text] Home Phone: [text] Priority: 1 Work Phone: [text] Priority: 2 Mobile Phone: [text] Priority: 3 Pager Number: [text] Priority: 4 Pager Window: [text] Email: [text] Password: [text] Duress Code: [text] Panel User number: [text] Global Contact: <input type="checkbox"/> Key Holder: <input type="checkbox"/> Cancel Alarms: <input type="checkbox"/> Edit Keyholders: <input type="checkbox"/> Edit Schedules: <input type="checkbox"/> Edit Site Data: <input type="checkbox"/> Add Contact   Global Contacts   Update   Cancel																																											

This is how the groups are currently set up:

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Portal Training Guide –  
Updating Key Holder Groups.



Groups (+ add group)

Group	Area	Edit	Del
<All Contacts>			
1 - Owner Mobiles	All areas		
2 - Main Keyholder Group	All areas		
3 - Automation SMS	All areas		
4 - Automation Email	All areas		

Contacts

Name	Numbers
Owner Mobiles	M:0111111111

Groups (+ add group)

Group	Area	Edit	Del
<All Contacts>			
1 - Owner Mobiles	All areas		
2 - Main Keyholder Group	All areas		
3 - Automation SMS	All areas		
4 - Automation Email	All areas		

Contacts

Name	Numbers
------	---------

Groups (+ add group)

Group	Area	Edit	Del
<All Contacts>			
1 - Owner Mobiles	All areas		
2 - Main Keyholder Group	All areas		
3 - Automation SMS	All areas		
4 - Automation Email	All areas		

Contacts

Name	Numbers
------	---------

Groups (+ add group)

Group	Area	Edit	Del
<All Contacts>			
1 - Owner Mobiles	All areas		
2 - Main Keyholder Group	All areas		
3 - Automation SMS	All areas		
4 - Automation Email	All areas		

Contacts

Name	Numbers
------	---------

So at current the only group to have any active contacts in is the **Owner Mobiles** group, but we have a **Keyholder** set up unassigned.

*(Please Note – You can leave Contacts in an unassigned state if they need to be on the account but not actionable – we will explain this further down.)*

To add in a new contact for multiple groups you need to add them into any one of the groups to begin with. For this we will be adding them into the **<All Contacts>** section.

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**Portal Training Guide –  
Updating Key Holder Groups.**

Once you click on **Add Contact** the boxes will become editable:

Group	Area	Edit	Del
<All Contacts>			
1 - Owner Mobiles	All areas	<input type="checkbox"/>	<input type="checkbox"/>
2 - Main Keyholder Group	All areas	<input type="checkbox"/>	<input type="checkbox"/>
3 - Automation SMS	All areas	<input type="checkbox"/>	<input type="checkbox"/>
4 - Automation Email	All areas	<input type="checkbox"/>	<input type="checkbox"/>

Name	Numbers	Permissions	Group	Edit	Del
Keyholder 1	T:0222 222 2222			<input type="checkbox"/>	<input type="checkbox"/>
Owner Mobiles	M:0111111111			<input type="checkbox"/>	<input type="checkbox"/>

General | Availability | Notes

Contact Name:

Home Phone:  Priority: 1

Work Phone:  Priority: 2

Mobile Phone:  Priority: 3

Pager Number:  Priority: 4

Pager Window:

Email:

Password:

Duress Code:

Panel User number:

Global Contact:

Key Holder  
 Cancel Alarms  
 Edit Keyholders  
 Edit Schedules  
 Edit Site Data

Here you add your contact like normal:

General | Availability | Notes

Contact Name:

Home Phone:  Priority: 1

Work Phone:  Priority: 2

Mobile Phone:  Priority: 3

Pager Number:  Priority: 4

Pager Window:

Email:

Password:

Duress Code:

Panel User number:

Global Contact:

Key Holder  
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Once you click **Save** you will notice they have been added to the **<All Contacts>** group:

**Groups** (+ add group)

Group	Area	Edit	Del
<All Contacts>			
1 - Owner Mobiles	All areas		
2 - Main Keyholder Group	All areas		
3 - Automation SMS	All areas		
4 - Automation Email	All areas		

**Contacts**

Name	Numbers	Permissions	Group	Edit	Del
Keyholder 1	T:0222 222 2222				
Keyholder 2	T:033 333 3333				
Owner Mobiles	M:0111111111				

To assign them to the correct groups you need to click on the **'Group'** Icon to the right of **Permissions**:

**Contacts**

Name	Numbers	Permissions	Group	Edit	Del
Keyholder 1	T:0222 222 2222				
Keyholder 2	T:033 333 3333				
Owner Mobiles	M:0111111111				

This will bring up a pop up showing where that particular contact is assigned:

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**Portal Training Guide –  
Updating Key Holder Groups.**

**Group Selection**

Groups for: **Owner Mobiles**

Group	Area	Member
1 - Owner Mobiles	All Areas	<input checked="" type="checkbox"/>
2 - Main Keyholder Group	All Areas	<input type="checkbox"/>
3 - Automation SMS	All Areas	<input type="checkbox"/>
4 - Automation Email	All Areas	<input type="checkbox"/>

Cancel Update

At current the **Owner Mobiles** contact is assigned to the **Owner Mobiles Group** only, as we also want it in the **Automation SMS** we just need to tick the box for this:

**Group Selection**

Groups for: **Owner Mobiles**

Group	Area	Member
1 - Owner Mobiles	All Areas	<input checked="" type="checkbox"/>
2 - Main Keyholder Group	All Areas	<input type="checkbox"/>
3 - Automation SMS	All Areas	<input checked="" type="checkbox"/>
4 - Automation Email	All Areas	<input type="checkbox"/>

Cancel Update

Then click **Update**. If we now check the **Automation SMS** group you will see **Owner Mobiles** has been added:

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Portal Training Guide –  
Updating Key Holder Groups.

**Groups** (+ add group)

Group	Area	Edit	Del
<All Contacts>			
1 - Owner Mobiles	All areas		
2 - Main Keyholder Group	All areas		
3 - Automation SMS	All areas		
4 - Automation Email	All areas		

**Contacts**

Name	Numbers	Permissions	Priority	Group	Edit	Del
Owner Mobiles	M:0111111111		01	3		

Go back to <All Contacts> to assign the next contact, we are going to put **Keyholder 1** into the relevant groups:

**Group Selection** x

Groups for: **Keyholder 1**

Group	Area	Member
1 - Owner Mobiles	All Areas	<input type="checkbox"/>
2 - Main Keyholder Group	All Areas	<input checked="" type="checkbox"/>
3 - Automation SMS	All Areas	<input checked="" type="checkbox"/>
4 - Automation Email	All Areas	<input type="checkbox"/>

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Portal Training Guide –  
Updating Key Holder Groups.

Then the same for **Keyholder 2**:

Groups (+ add group)

Group	Area	Edit	Del
<All Contacts>			
1 - Owner Mobiles	All areas		
2 - Main Keyholder Group	All areas		
3 - Automation SMS	All areas		
4 - Automation Email	All areas		

Contacts

Name	Numbers	Permissions	Priority	Group	Edit	Del
Keyholder 1	T:0222 222 2222		01	2		
Keyholder 2	T:033 333 3333		02	2		

Groups (+ add group)

Group	Area	Edit	Del
<All Contacts>			
1 - Owner Mobiles	All areas		
2 - Main Keyholder Group	All areas		
3 - Automation SMS	All areas		
4 - Automation Email	All areas		

Contacts

Name	Numbers	Permissions	Priority	Group	Edit	Del
Owner Mobiles	M:0111111111		01	3		
Keyholder 1	T:0222 222 2222		02	3		
Keyholder 2	T:033 333 3333		03	3		

The contacts are added to the group in the order that you assign them. If you need to change the order you just use the **Priority** arrows like normal until they are in the correct places:

Priority
01
02
03

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**Please Note** – For Keysafe Code and Medical Information Keyholders, these should be listed under the Main Keyholder Groups, normally called Owner Mobile Group and Main Keyholder Group on Residential sites, this is to ensure this information is presented to the Operators. These keyholders do not need to be listed under any ‘Automation’ Groups.

(Please see the Portal Training Guide KH Availability for further information on this.)

If we no longer need **Keyholder 2** on the account we can delete them from one of the groups using the **Red Cross**:

**Groups** (+ add group)

Group	Area	Edit	Del
<All Contacts>			
1 - Owner Mobiles	All areas		
2 - Main Keyholder Group	All areas		
3 - Automation SMS	All areas		
4 - Automation Email	All areas		

**Contacts**

Name	Numbers	Permissions	Priority	Group	Edit	Del
Keyholder 1	T:0222 222 2222		01	2		
Keyholder 2	T:033 333 3333		02	2		

You will be presented with the following:

**Do you want to remove the contact from this site?**

If you click **Continue** then that contact will be removed completely from the account:

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**Groups** (+ add group)

Group	Area	Edit	Del
<All Contacts>			
1 - Owner Mobiles	All areas		
2 - Main Keyholder Group	All areas		
3 - Automation SMS	All areas		
4 - Automation Email	All areas		

**Contacts**

Name	Numbers	Permissions	Group	Edit	Del
Keyholder 1	T:0222 222 2222				
Owner Mobiles	M:0111111111				

However if you just need to remove them from one group you do this via **<All Contacts>** and the **Group** button, simply untick the groups you no longer need them in.

When adding in **Email Addresses** for **Automation** or **Reporting** purposes please add them in in the below format as the system will not create a contact if all of the **'Phone Number'** fields are blank:

General | Availability | Notes

Contact Name	Automation Email	Email	Automation@automation.com	Key Holder	<input checked="" type="checkbox"/>
Home Phone	Automation Email  Priority 1 <input type="text"/>	Password	<input type="text"/>	Cancel Alarms	<input checked="" type="checkbox"/>
Work Phone	<input type="text"/> Priority 2 <input type="text"/>	Duress Code	<input type="text"/>	Edit Keyholders	<input checked="" type="checkbox"/>
Mobile Phone	<input type="text"/> Priority 3 <input type="text"/>	Panel User number	<input type="text"/>	Edit Schedules	<input checked="" type="checkbox"/>
Pager Number	<input type="text"/> Priority 4 <input type="text"/>	Global Contact	<input type="checkbox"/>	Edit Site Data	<input checked="" type="checkbox"/>
Pager Window	<input type="text"/>				

**Add Contact** | Global Contacts | **Save** | **Cancel**

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You may find that there are already contacts set up in the **Automation Email** group, please do not delete these contacts, if you are unsure of any contacts that you have not added to an account please contact us to confirm if it is something that has been setup by ourselves for a specific reason.

Please remember, when you add in a new contact to also assign them to the **Automation SMS** group if they are to get **Automated Text** messages alerting them of signals.

### Unassigned Contacts

There are times where you want a contact on the account but they are not be contacted. For example if you want a specific password to put the Fire Alarm on test, or if your site contains multiple units and each one has their own password to gain entry. Sometimes you will have a specific contact who needs to be able to access multiple accounts with their own password. This can be done by setting them up in the **Customer Contacts** section but not assigning them to any **Groups**.

Here we have added in 2 'Units' with Passwords, but we have not assigned them to any groups.

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## Portal Training Guide – Updating Key Holder Groups.

**Groups** (+ add group)

Group	Area	Edit	Del
<All Contacts>			
1 - Owner Mobiles	All areas		
2 - Main Keyholder Group	All areas		
3 - Automation SMS	All areas		
4 - Automation Email	All areas		

**Contacts**

Name	Numbers	Permissions	Group	Edit	Del
Keyholder 1	T:0222 222 2222				
Owner Mobiles	M:01111111111				
Unit 1					
Unit 2					

**General** | Availability | Notes

<p>Contact Name: <input type="text" value="Unit 2"/></p> <p>Home Phone: <input type="text"/> Priority: <input type="text" value="1"/></p> <p>Work Phone: <input type="text"/> Priority: <input type="text" value="2"/></p> <p>Mobile Phone: <input type="text"/> Priority: <input type="text" value="3"/></p> <p>Pager Number: <input type="text"/> Priority: <input type="text" value="4"/></p> <p>Pager Window: <input type="text"/></p>	<p>Email: <input type="text"/></p> <p>Password: <input type="text" value="UNIT2"/></p> <p>Duress Code: <input type="text"/></p> <p>Panel User number: <input type="text"/></p> <p>Global Contact: <input type="checkbox"/></p>	<p><input checked="" type="checkbox"/> Key Holder</p> <p><input checked="" type="checkbox"/> Cancel Alarms</p> <p><input checked="" type="checkbox"/> Edit Keyholders</p> <p><input checked="" type="checkbox"/> Edit Schedules</p> <p><input checked="" type="checkbox"/> Edit Site Data</p>
--	--	---

**Group Selection**

Groups for: Unit 1

Group	Area	Member
1 - Owner Mobiles	All Areas	<input type="checkbox"/>
2 - Main Keyholder Group	All Areas	<input type="checkbox"/>
3 - Automation SMS	All Areas	<input type="checkbox"/>
4 - Automation Email	All Areas	<input type="checkbox"/>

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**Portal Training Guide –  
Updating Key Holder Groups.**

***Please Note*** – the system will prompt you to input a phone number each time you create a contact, for contacts that are purely for password purposes then input ‘not a keyholder’ into the Home Phone Field and Save :

General | Availability | Notes

Contact Name: Unit 3

Home Phone:  Priority: 1


Work Phone:  Priority: 2

Mobile Phone:  Priority: 3

Pager Number:  Priority: 4

Pager Window:

Message from webpage

 A key holder must have at least one contact number. Please ensure a number is entered and try again.

OK

UNIT3

- Key Holder
- Cancel Alarms
- Edit Keyholders
- Edit Schedules
- Edit Site Data

Add Contact | Global Contacts

Update | Cancel

General | Availability | Notes

Contact Name: Unit 3

Home Phone: Not a keyholder  Priority: 1

Work Phone:  Priority: 2

Mobile Phone:  Priority: 3

Pager Number:  Priority: 4

Pager Window:

Email:

Password: UNIT3

Duress Code:

Panel User number:

Global Contact:

- Key Holder
- Cancel Alarms
- Edit Keyholders
- Edit Schedules
- Edit Site Data

Add Contact | Global Contacts

Save | Cancel

As you can see the contact has been added and there are no numbers listed:

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## Portal Training Guide – Updating Key Holder Groups.

Groups (+ add group)				Contacts					
Group	Area	Edit	Del	Name	Numbers	Permissions	Group	Edit	Del
<b>All Contacts</b>				Keyholder 1	T:0222 222 2222				
1 - Owner Mobiles	All areas			Owner Mobiles	M:0111111111				
2 - Main Keyholder Group	All areas			Unit 1					
3 - Automation SMS	All areas			Unit 2					
4 - Automation Email	All areas			Unit 3					

General		Availability		Notes	
Contact Name	Unit 3	Email		Key Holder	<input checked="" type="checkbox"/>
Home Phone		Password	UNIT3	Cancel Alarms	<input checked="" type="checkbox"/>
Work Phone	Priority 1	Duress Code		Edit Keyholders	<input checked="" type="checkbox"/>
Mobile Phone	Priority 2	Panel User number		Edit Schedules	<input checked="" type="checkbox"/>
Pager Number	Priority 3	Global Contact	<input type="checkbox"/>	Edit Site Data	<input checked="" type="checkbox"/>
Pager Window	Priority 4				

[Add Contact](#) [Global Contacts](#) [Update](#) [Cancel](#)

Once you have finished updating the account you need to add this information in the **User Defined** section:



Monitoring | Keyholding | Partnering

[General](#) | [Customer Contacts](#) | [Site Contacts](#) | [Special Instructions](#) | [Transmitters](#) | [Areas](#) | [Agencies](#) | [Devices](#) | [Alarms](#) | [Conversions](#) | [User Defined](#) | [History](#) | [URNs](#)

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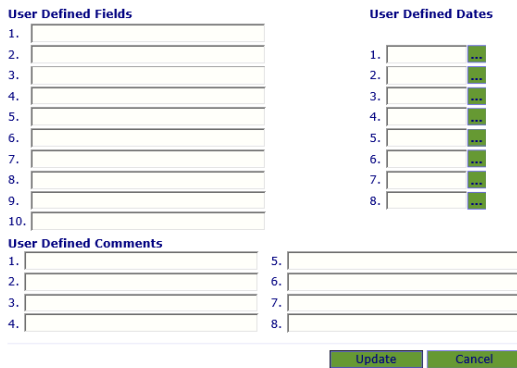
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## Portal Training Guide – Updating Key Holder Groups.

Here we are going to update the **User Defined Comments** and **User Defined Dates**:



The screenshot shows three sections of a form:

- User Defined Fields:** A list of 10 empty text input fields numbered 1 to 10.
- User Defined Dates:** A list of 8 empty text input fields numbered 1 to 8, each with a small green calendar icon to its right.
- User Defined Comments:** A list of 8 empty text input fields numbered 1 to 8.

At the bottom of the form are two buttons: "Update" and "Cancel".

In the **User Defined Comments** we need to input why we have updated the account. For this one we will input it is a Key Holder update.

### User Defined Comments

1.

Make sure you only ever update the number **1** field for both. To update the **User Defined Dates** you need to click on the 3  and this will bring a calendar pop up for you to select the date:

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Portal Training Guide –  
Updating Key Holder Groups.

User Defined Dates	
1.	11/06/2018 ...
2.	...
3.	...
4.	...
5.	...
6.	...
7.	...
8.	...

**Date Selection** [X]

< June 2018 >

Mon	Tue	Wed	Thu	Fri	Sat	Sun
28	29	30	31	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	1
2	3	4	5	6	7	8

OK Cancel

Click **OK** and then **Update** to save this information. By updating this field every time you update the account you can see at a glance when it was last updated and why.

If you require any further information on the above, please contact us at [Arc@CougarMonitoring.com](mailto:Arc@CougarMonitoring.com)

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