

**ElectriCities Member Portal
Membership Directory Update Guide**

Thank you for helping update your organization’s information in our new member portal. This guide walks you through the basics of creating your account and reviewing and editing your directory information, and it provides a person to contact if you need help.

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*Hyperlinks in the document are indicated in blue underline.*

**Clerk Directions for Initial Login:**

**How to log in to your user account in the NEW ElectriCities Portal:**

* Go to sign-in page: <https://portal.electricities.com/Security/Sign-In>.
* Select “I forgot my password” on the right of the page.
* Enter your email address (the address where you received these instructions) and select “find account”
* Once account is found, select “OK” to have your password reset email sent.
* Reset your password.
	+ If the system does not identify your email address, contact websupport@electricities.org and a staff member will follow up with you to assist.

Once you’re logged in, you will see the main dashboard of the portal.

**Review & Edit Your Directory Information**

Access the [ElectriCities Member Portal.](https://portal.electricities.com/Security/Sign-In)

You can **see** a view of the directory contacts by navigating to “Directories” on the main navigation. To make edits to the information you see on this screen, [navigate to My Account and select “My Organization.”](https://portal.electricities.com/My-Account/My-Organization/Organization-Profile)

**Important sections to review and edit:**

1. Validate Town Hall information (if applicable).
2. Validate Utility Operations Center information.
3. Add or remove a **Directory Role.** View current staff assigned to various **Directory Roles** using the prebuilt categories.
	1. Directory Roles will be included in the print directory.
	2. Use the best category for the staff members you would like to see in the print directory. Note that the category does NOT display, but it’s what helps assign the order of viewing online and in print. The staff member’s title will display.
	3. Please only assign one Directory Role to an individual.
	4. Deleting a Directory Role or Key Contact only removes the assignment of the directory role, not the person. See Organization Contacts to completely remove a person from your organization.
4. **NEW Feature! Key Contacts by Functional Area** allows better identification of expertise by our membership.
	1. Use this section to better identify key contacts for various utility roles.
	2. This will be included in the online directory only, not print.
	3. One person can be the Key Contact by Functional Area for multiple functions.
5. **Council Members**
6. **Organization Contacts** section (bottom of the page) displays all contacts associated with your organization. Please review the Contacts affiliated with your organization. Delete, add, or edit staff information in this section. Each individual must have a **unique** email address.
	1. To **add** an organization contact, select “Add New Staff Member.” Have the following information available to add: first name, last name, email address, business phone, job title
	2. To **remove** an organization contact, select the trash can icon next to their information. Please note: You MUST do this in the Organization Contacts section, not the Key Role or Directory Role section, to remove them from your city.
	3. To **edit** an organization contact, select the pencil icon and complete any change needed.
	4. If you find **a duplicate** record for a contact, please email jjohanns@electricities.org with the person’s name and the contact information (including email). She will merge the individual’s record for you.

**Important Notes**

* If you cannot edit a piece of information, it may be because of a permission that is set for information controls. Please reach out to Jenny Johanns to submit your correction.
* Check each tab to make sure it has the most current information.
* Please use proper punctuation, do not use CAPS, and do not abbreviate titles.
* Please become familiar with this system, as you will likely be asked for help by the staff in your city when they get access to the platform on Oct. 26. Let me know any questions you have along the way.

**For more information:**

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**Directory Role**

It is important to note that the directory (both online & in print) does not display these “Key Role Names.” The individual assigned to the role will be displayed instead.

|  |  |  |
| --- | --- | --- |
| **Directory Role** | **Description** | **Title** |
| City/Town/Commission Manager | This role should be assigned to the highest-ranking staff member of your organization. This can be a General Manager, City Manager, Town Manager, Town Administrator, Commission Manager, CEO. | **Displays as the individual’s title** |
| Assistant Town/City Manager | This role should be assigned to any assistant managers. Multiple individuals can hold this role. |  |
| Town/City Clerk | This should be the Town/City Clerk or a lead admin who serves as ElectriCities’ key contact for administrative coordination. |  |
| Utility Operations Leader | The leader of your organization’s utility operations, often the Utility Director |  |
| Finance | Key contact for finance, such as a Finance Director |  |
| Human Resources | Human Resources leader |  |
| Communications Lead | The leader of your organization’s communications efforts, often the Public Information Officer. |  |
| IT & Cybersecurity | Key IT or Cybersecurity leadership |  |
| Other Key Contact | Use for any role that should be included in the print directory that is not listed in Directory Roles. For contacts who should be included only in the online directory, review the Key Staff by Functional Area section. |  |
| Attorney/Legal | Your organization’s lead legal contact |  |

**Other Key Staff by Functional Area**

Identify staff members within your organization for the following key utility and public power functions. There can be multiple staff members assigned to these roles:

|  |
| --- |
| **Functional Role** |
| Emergency Assistance Primary |
| Emergency Assistance Secondary |
| Customer Service Lead |
| Economic Development |
| Business Planning |
| Communications |
| Key Accounts |
| Engineering |
| Distributed Generation, Load Management & Interconnection |
| Wholesale Billing |
| Retail Billing |
| Rates |
| EIA Contact |
| Load Forecast/System Planning |
| Compliance Key Contact |
| Safety Training Coordinator |