



Default Users for Service Areas

All utility organizations involved with projects in URMS have geographic service areas defined. Now a utility can identify a user to be the default contact for a service area so that person is automatically set as the contact and added to the Project Team when the utility is added to any new projects within that area. The contact must have a registered user ID in the system to be an option for this selection.

How to Set a Default User for a Service Area

1. Go to the utility profile at *My Utility > Utility Profile*.
2. Select the Service Area tab.
3. Click the *Edit* text for an existing service area or click the *Add Service Area* button at the bottom to create a new one.
4. Use the *Default Project Team to* dropdown to select a registered user.
5. Click *Save* in both the modal window and the Service Area tab.

Add Service Area

Service Area Name: * Western Region

Utility Type: * Electric

Default Project Team to: -Select-

Select All Counties

Adams
 Allegheny

This icon indicates complete selection of Municipalities
 This icon indicates partial selection of Municipalities

How It May be Used

The default team selection may be used for a variety of approaches. As an example, the utility might have a lead manager for a service area of the organization who is set as the default contact. When PennDOT adds the utility to a project, that manager will be placed on the utility team for it. Then they will be in position to use their own discretion to make sure the right staff are assigned as the URMS project team members according to the specific kind of project every time a project develops in the service area.

Or, the utility might have a designated staff member handle all URMS responsibilities for a particular region. With the default service area selection made, they can know the correct user will be notified as soon as possible for a new project in that respective region.

What if my user is not showing in the default options?

If an individual does not appear in the dropdown list of options, go to the Contacts tab and confirm there is a User ID for the contact. Also, ensure the contact is assigned to the service area in question by clicking the *Edit* text in the Actions column of the Contacts tab and checking the Service Area selection at the bottom of the modal window. A contact can only be the default for a service area if they are assigned to that service area.

Contacts

Name	Email Address	Primary Phone	User ID	Utility Type	Actions
Test C Name	test@gmail.com	(323) 333-3333	b-uuatutil1const	Electric	Edit