



# eDART XML Forum

September 14, 2023

- Fall Model Build
- eDART Browserless Retirement
- PJM CLI Updates
- Company Distributed Workflow (CDW) Member/Agent Read Only Agent Functionality
- Future Enhancements
- eDART Account Migration Updates
- Question and Answer Resolution

- eDART Advance Fall 2023 Model Build occurred September 6-7.
  - [GO and TO Users] Download updated equipment lists in eDART
  - [TO R/W Users] Transmission Tickets can be created or updated with future equipment
  - Equipment List/Complete Descriptions file:  
<https://edart.pjm.com/reports/equiplist.csv> will be updated on  
Model Build Date: September 19

## Retirement of eDART Browserless in Production

- filetransfer.jar was replaced with PJM CLI
- Retirement date: **11/01/2023**
- eDART team available to help as needed
- Outreach ongoing to users that have not made the transition
- See [Browserless User Guide](#) for more information

- New PJM CLI available = version 1.5.6
  - Updated URLs for eDART SSO
  - Available at [PJM - System Requirements](#)
  - Required for use by migrated accounts.
    - Related changes discussed during [June 14 eDART XML Forum](#).
  - Cannot be used by yet-to-be-migrated (legacy) accounts.
- Legacy accounts can continue to use Current PJM CLI = version 1.5.4



# CDW Member/Read Only Agent Functionality

- CDW Member/Agent functionality allows users for one company (Agent) to perform eDART functions on behalf of another company (Member) via their Agent user accounts.
  - Agent users will need only one eDART account under Agent.
  - Agent users will be able to perform transmission and generation functions in eDART.
  - Agent users will be able to switch Members within a single UI session of eDART. (No need to logout, and login.)
- Overview presentation [here](#).

- Previously, Member could only have one Read/Write Agent for either generation or transmission functions in eDART.
- Enhancements made to allow Member to have one or more Read-Only Agents.
  - New Agreement types in Account Manager
  - No Declaration of Authority (DOA) required
    - Agent signs a Master Agreement form
    - Member(s) sign a Member Authorization form
    - Company email and CDW admin still required
  - When logged into eDART as a Read Only Agent, the eDART session is set to be read only – Submit and Uploads disabled.



# Future Enhancements

New parameter to be added for CDW Agent user to specify which CDW Member the Dart browserless call is for.

- Parameter = cdwshortname
- Value = short name of the CDW Member
- By default, Dart browserless call will be made for CDW Agent

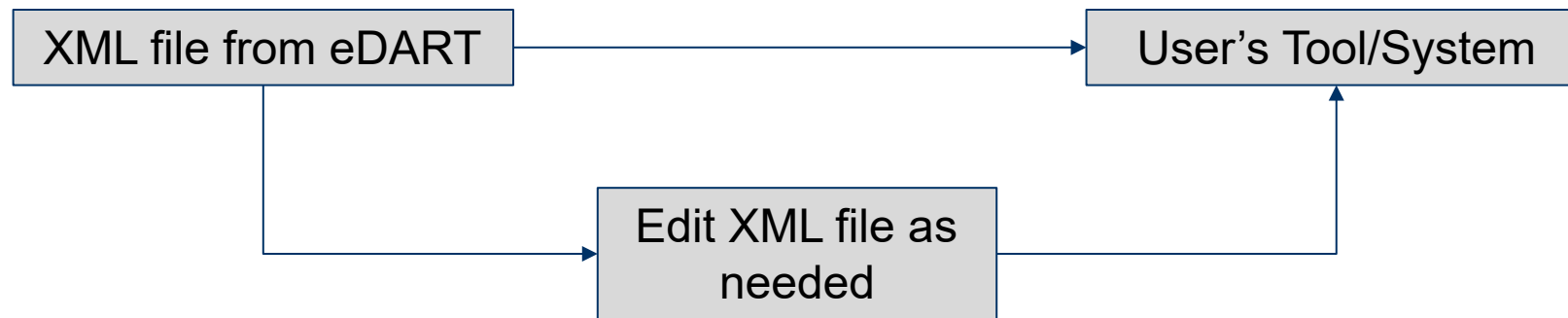
‘cdwcompany’ parameter recently added for the same function using the Company/Account ID.

- Error will be returned if cdwcompany and cdwshortname are provided and conflict

e.g.

```
%CLIENT% -s %APP_URL% -a  
upload/com.pjm.xml.upload.edartEDartXmlUpload --httpType POST -q  
dart=true -f C:/path/to/file -q cdwshortname=PJM
```

- Current PJM CLI testing often requires assistance from eDART team to update ticket information especially ticket status.
  - Requests are handled as they are received pending availability of SMEs; may not be as soon as desired.
  
- Proposals to help support self-servicing of ticket updates:
  1. User manipulation of XML files as input to user's tool/system.



## 2. New form for updating ticket status

- Will be available in eDART Training only
- Only for updating ticket status
- Results will be successful status update or generic error
  - No details on business rules that triggered the error

If interested in the new form, inform the eDART team ([eDARTHelp@pjm.com](mailto:eDARTHelp@pjm.com)).

Revisions to the *pro forma* Open Access Transmission Tariff (OATT) and the Commission's regulations under the Federal Power Act to improve accuracy and transparency of electric transmission line ratings.

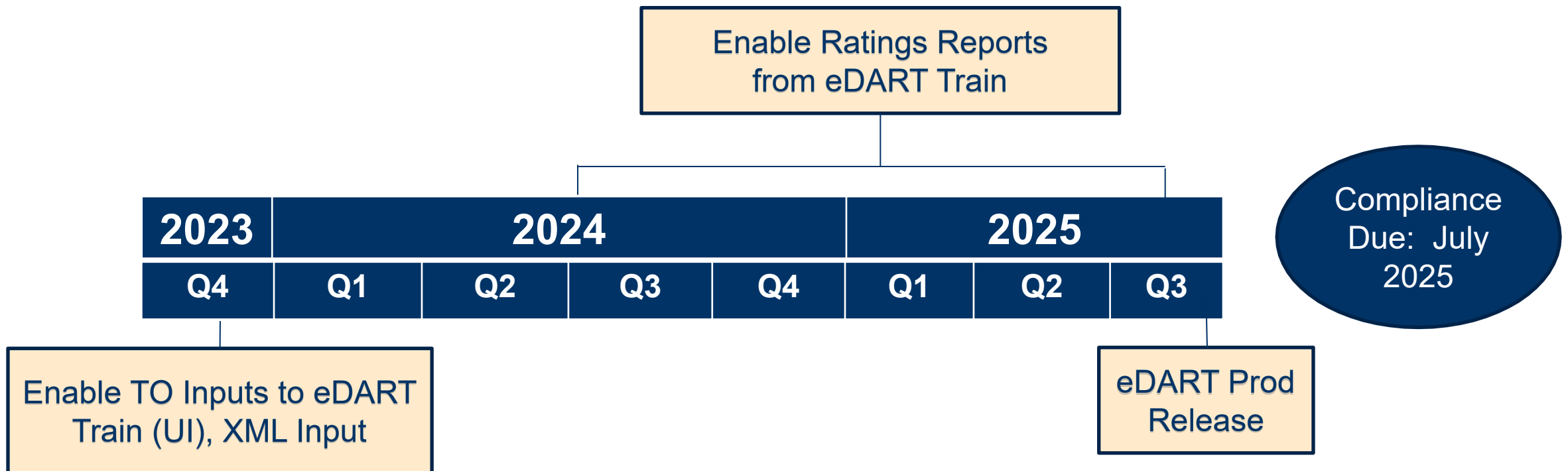
- Impacts eDART TERM Application
- eDART Project underway
- Compliance due July 2025

## Deliverables:

- Functionality to submit and view ratings lookup tables
- Functionality to manage AAR exceptions and TO Methodology
- AAR Seasonal rating functionality
- Ability to pull ratings for the Operations Time Horizon for all eDART users
- Enhancements available in Train only
  - CLI to support current and new functionality
  - UI updated to reflect new functionality

See [presentation](#) from 5/8/2023 Special eDART Forum – FERC Order 881

## High Level Timeline: eDART Order 881 Enhancements



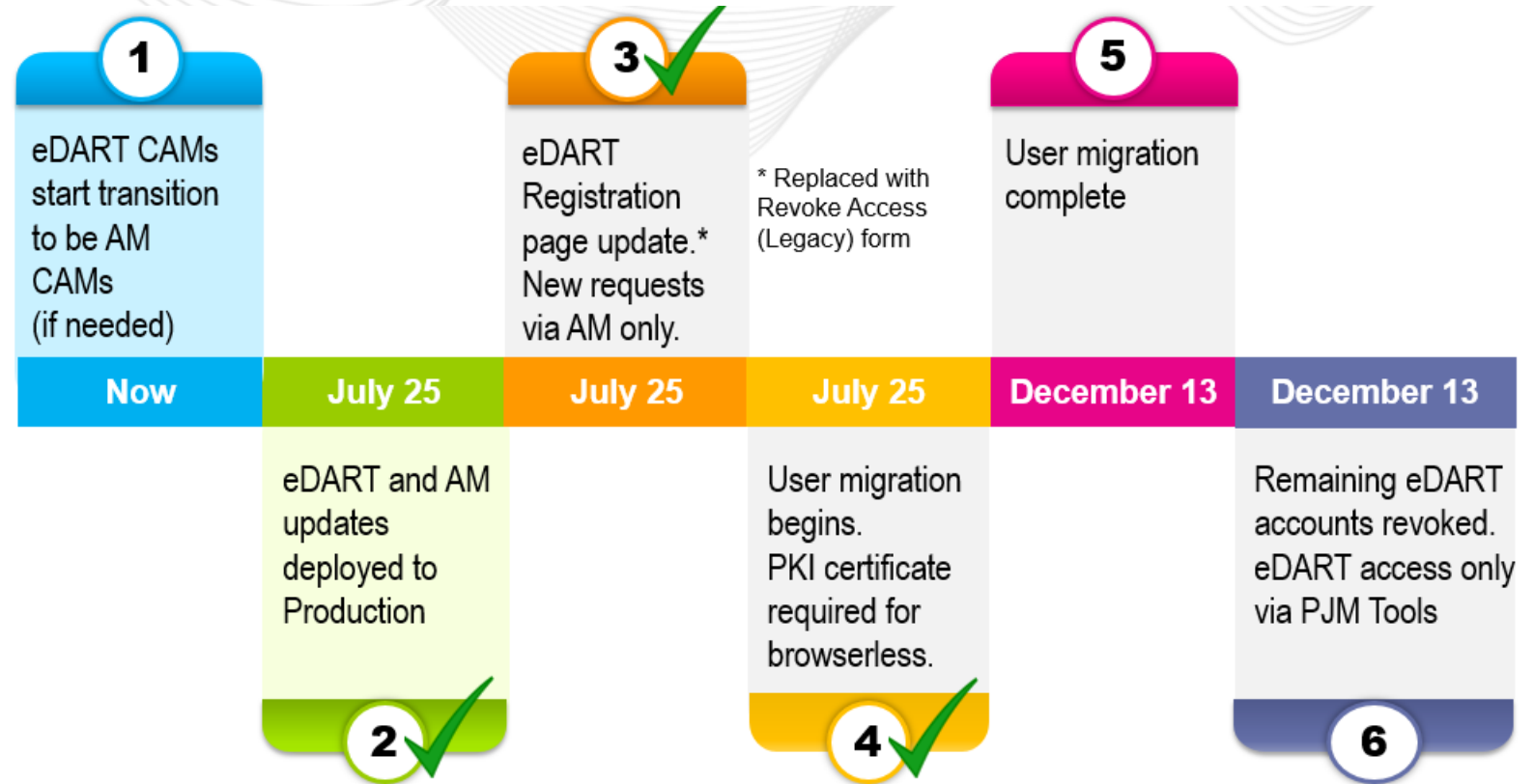




# eDART Account Migration Update

Migration of eDART users to Account Manager is currently underway (7/25/2023 – 12/13/2023):

- [Migration to Account Manager Guide](#)
- [Revoke Access \(Legacy\)](#) – submit for users who will not migrate to Account Manager
- [Migration to Account Manager FAQ](#)
- [Presentation, 6/23/2023](#)  
Special eDART Forum – Account Migration



Communication will be sent out for each milestone

<b>As of: 9/11/2023</b>	
Companies in eDART	738
eDART Accounts*	7,627
eDART Accounts in AM	642
% Complete	8.4%

*\* Account numbers will likely change during migration period (e.g., includes accounts that may never be migrated)*

✓	Step
	eDART CAM transition to Account Manager CAM (optional)
	eDART CAM transition responsibilities with Account Manager CAM if not opting to be Account Manager CAM
	Request current eDART user list from eDART team ( <a href="mailto:eDARTAccountRequests@pjm.com">eDARTAccountRequests@pjm.com</a> )
	Migrate current eDART users as applicable: <ul style="list-style-type: none"> <li>• Create new AM user account</li> <li>• Request eDART access for existing AM user account</li> <li>• Contact eDART team for bulk option/working session</li> <li>• Address Special Conditions</li> </ul>
	Request check-in with eDART team ( <a href="mailto:eDARTAccountRequests@pjm.com">eDARTAccountRequests@pjm.com</a> ) to confirm completion <ul style="list-style-type: none"> <li>• Submit revoke request for accounts that will not be migrated</li> </ul>

- Account Manager CAM or user can request eDART access via Account Manager.
  - See ‘User Profile – Account Access’ section of the User Account Management Quick Guide [here](#).
  - Bulk request option (25 or more requests): Account Manager CAMs can work with eDART and AM teams for bulk access requests.
    - Production only
    - Review of the user list needed
    - Bulk requests processed on Thursdays

A	B
USERNAME	ACCESS
TestUser1001	eDART Transmission Read Only
TestUser1002	eDART Transmission Read Write
TestUser1006	eDART Generic
TestUser1007	eDART Transmission Read Write

### User list review

- CAM review and update user access list
- eDART admins review and finalize user access list
- New accounts (not currently in eDART) can be created and then included



User Certification
Pending Tasks

User Access Requests
User Requests

	Actions	First
➤	<input type="checkbox"/> <input checked="" type="checkbox"/>	Testing
➤	<input type="checkbox"/> <input checked="" type="checkbox"/>	Testing
➤	<input type="checkbox"/> <input checked="" type="checkbox"/>	Testing
➤	<input type="checkbox"/> <input checked="" type="checkbox"/>	Testing

### Access requests submitted

- eDART and AM Teams submit bulk access requests
- CAM approves the requests
- CAM submits additional requests via eDART if needed



### Done!

- Pending any additional requests
- eDART team complete provisioning if needed

- Account Manager CAM approves the requests from Pending Task tab

Pending Tasks

[User Certification](#) | **[Pending Tasks](#)** | [Add New User](#) | [User Profile](#) | [My Company](#) | [Search](#) | [eDART CDW](#)

[User Access Requests](#) | [User Requests](#) | [Account Access Requests](#) | [Secure Content Access Requests](#) | [PKI Certificate Requests](#)

Show all requests  Pending only

Actions	First Name ↑ 2	Last Name ↑ 1	Username	Email	Phone	Employer
<input checked="" type="checkbox"/> <input checked="" type="checkbox"/>	Testing	Load	TestUser1001		1231231231	PJM TEST [PJMTST]
Request Date	Actions	Account ID	Account	Tool	Access type	Status
06/19/2023	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/>	2214	PJM TEST [PJMTST]	eDART	Transmission Read Only	<span style="color: red;">■</span> Pending
<input checked="" type="checkbox"/> <input checked="" type="checkbox"/>	Testing	Load	TestUser1002		1231231231	PJM TEST [PJMTST]
Request Date	Actions	Account ID	Account	Tool	Access type	Status
06/19/2023	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/>	2214	PJM TEST [PJMTST]	eDART	Transmission Read Write	<span style="color: red;">■</span> Pending
<input checked="" type="checkbox"/> <input checked="" type="checkbox"/>	Testing	Load	TestUser1006		1231231231	PJM TEST [PJMTST]
Request Date	Actions	Account ID	Account	Tool	Access type	Status
06/19/2023	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/>	2214	PJM TEST [PJMTST]	eDART	Generic	<span style="color: red;">■</span> Pending
<input checked="" type="checkbox"/> <input checked="" type="checkbox"/>	Testing	Load	TestUser1007		1231231231	PJM TEST [PJMTST]
Request Date	Actions	Account ID	Account	Tool	Access type	Status
06/19/2023	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/>	2214	PJM TEST [PJMTST]	eDART	Transmission Read Write	<span style="color: red;">■</span> Pending

Records Per Page: 15 << < 1-4 of 4 records > >> [Reset Filters](#)



- Migration of some eDART account requests may require additional steps and thus user may experience a delay between when the request is approved and when they can log into eDART. E.g.
  - Transmission access requests that need CEII check/approval
  - Requests for usernames that currently exist in eDART and require review before update
  - ‘Resurrecting’ revoked eDART accounts may require additional updates in eDART
- Requests are handled as they come in the queue – contact the eDART team if anything needs to be expedited.



- ‘eDART Generic’ company is used currently for users in eDART who do not have eDART CAMs and request generic access.
  - If the user has a Account Manager CAM in Account Manager, eDART generic access should be requested under the appropriate user account.
  - Otherwise, the user must register their user account under the company ‘Other’.

- Possible scenario where some users in a company are migrated and other users are not.
- May result in inability of some users to access eDART via in-house company tool if tool is/is not updated to use eDART SSO login.
  - Work with vendor/technical support to coordinate migration
  - Some users may need to log directly into eDART
- CAMs can contact eDART team as needed to track status of migration per company.
  - Submit revoke requests for users that will not be migrated

- eDART is a suite of tools and as such has a security configuration that is not compatible with SUMA.
- After extensive consideration and technical evaluation, eDART will not be SUMA enabled similar to other tools like Data Miner 2, Data Viewer, Emergency Procedures and TO Connection.
- CDW for eDART
  - CDW information included in later slides.
  - Contact [eDARTCDW@pjm.com](mailto:eDARTCDW@pjm.com) to request CDW demo

- eDART access granted to SUMA accounts can only be used for the parent/main company account.
  - If not using CDW, individual AM user accounts will be needed for the sub-accounts.
  - SUMA account can be migrated to have the desired company for eDART set as the primary/main account.
- To request access for a SUMA account,
  - Click on Request Access → Add Account
  - Search for and select the main company
  - Select the desired eDART role to request

- eDART Production and eDART Train access will need to be requested and managed separately in Account Manager.
- Existing eDART Train user accounts will need to request eDART access in Account Manager Train if access is still needed.
  - Contact eDART team if eDART access is not available to select in Account Manager Train.

## Migrated users...

- Can only log into eDART via PJM Tools
  - Train: <https://edartssotrain.pjm.com/edartsso>
  - Prod: <https://edartsso.pjm.com/edartsso>
- Can use Single Sign On to log into eDART
- Will require PKI certificate for browserless interaction with eDART (if the user/system account does not already have one)
- Should contact their company CAMs for password resets and unlocking accounts

At the end of the user migration period, accounts that remain in eDART will be revoked

- Account Manager User Guides: <https://pjm.com/markets-and-operations/etools/account-manager>
- Member Maintenance User Guide: <https://pjm.com/-/media/etools/membership-management-community/member-maintenance-user-guide.ashx>
- eDART Migration to Account Manager Guide: <https://pjm.com/-/media/committees-groups/forums/edart/postings/migration-to-account-manager-guide.ashx>
- Migration FAQ: <https://pjm.com/-/media/committees-groups/forums/edart/postings/migration-to-account-manager-faq.ashx>
- eDART Account Types & Application Access: <https://pjm.com/-/media/etools/edart/account-types-and-application-access.ashx>

- CDW Unit-Task Overview: <https://pjm.com/-/media/etools/edart/edart-unit-task-training.ashx>
- CDW Member-Agent Overview: <https://pjm.com/-/media/etools/edart/cdw-member-agent-functionality.ashx>



Facilitator:

Chidi Ofoegbu: [Chidi.Ofoegbu@pjm.com](mailto:Chidi.Ofoegbu@pjm.com)

Secretary:

Maria Baptiste, [Maria.Baptiste@pjm.com](mailto:Maria.Baptiste@pjm.com)

[eDARTAccountRequests@pjm.com](mailto:eDARTAccountRequests@pjm.com) (Account Migration)

[eDARTHelp@pjm.com](mailto:eDARTHelp@pjm.com)



### Member Hotline

(610) 666 – 8980

(866) 400 – 8980

[custsvc@pjm.com](mailto:custsvc@pjm.com)

Thank you!