



# eDART Account Migration to Account Manager Guide

Migration Period: 7.25.2023 – 12.13.2023

For Public Use

## About this Migration Guide

**\*\*\*Update\*\*\* the bulk request options referenced in the following sections of this guide are no longer available after 12/13/2023: *High-level Checklist; eDART Users and Account Access; Bulk Request vs Manual Request; Bulk Request Process*\*\*\***

As part of eDART refresh, eDART accounts are migrating to Account Manager (AM).

At the end of the migration, the relevant user accounts in AM (PJM Tools) should have eDART roles granted to them, and users should be able to utilize Single Sign On (SSO) for eDART in Production and Train:

Production: <https://edartssso.pjm.com>

Training: <https://edartssotrain.pjm.com>

This document offers a step-by-step guide to assist CAMs/users as they complete access requests via bulk request or manual request in Account Manager for:

- eDART accounts in Production
- eDART accounts in Train
- eDART System Accounts
- eDART Generic Users

A section for **Common Scenarios** is included to provide direction for areas where questions may arise. Steps for adding **Additional Requests** for users directly in eDART are also outlined (e.g., adding access for Hydro Calculator, Nuclear Voltage Limits, etc.).

Reference links are listed at the end and throughout this document for those seeking additional detail and instruction. Support from eDART and Account Manager personnel is also available via email at [eDARTAccountRequests@pjm.com](mailto:eDARTAccountRequests@pjm.com).

Lastly, thank you for your efforts and support, and good luck!

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## High-level Checklist

Milestones listed in the checklist below can be used to identify next steps and track progress toward completion of eDART account migration to Account Manager:

✓	Step	Reference
	eDART CAM transition to Account Manager CAM	
	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 to confirm completion <ul style="list-style-type: none"> <li>• Submit <a href="#">Revoke Access (Legacy)</a> request for all accounts that will <u>not</u> be migrated</li> </ul>	<a href="mailto:eDARTAccountRequests@pjm.com">eDARTAccountRequests@pjm.com</a>

## eDART CAM Transition to Account Manager CAM

With the transition to AM, the eDART CAM role is no longer available. To transition to an AM CAM role:

- An officer, authorized representative or maintenance manager must designate an individual as a CAM through the Maintenance feature in the [Membership Management Community](#)
- Instructions are outlined on page 6 in the [Member Maintenance User Guide](#)

eDART CAMs that will not become Account Manager CAMs should work with their AM CAMs to transition their responsibilities.

- Plan for internal coordination if needed
- Share any special access usually requested (e.g. Hydro Calculator)
- Review current user list with Account Manager CAM

At the end of the user migration period, current eDART CAM role will be retired and CAM information deactivated in eDART.

## PKI Certificates

With the eDART account migration to AM, PKI certificates are required for all browserless communications.

Specifically, for eDART:

- PKI is required if accessing eDART via PJM-CLI (browserless)
- PKI is not required if accessing eDART via UI
- PKI is not tool-specific, therefore certificates already set up for use of other PJM Tools can be applied for eDART browserless usage

See the [PJM Security](#) home page for more information on PKI.

## eDART Users and Account Access

### *eDART Generic Users*

PJM will contact all eDART Generic users currently listed under 'eDART Generic' Company.

- If the user has an Account Manager CAM in Account Manager, CAMs should request eDART Generic access under the appropriate user account in AM
- Otherwise, the user must register their user account under the company 'Other'

### *eDART System Accounts*

System accounts in Account Manager cannot be used to access the UI.

- Users will need a separate individual account if UI access is desired
- System accounts require PKI certificates to interface with Dart Browserless

System Accounts can also be added to AM during Bulk Request.

To set up using a System Account outside Bulk Request, see New User Registration Quick Guide [here](#), specifically:

- How to Add a New System Account as a CAM Admin
- How to Set Up a New system Account as a User

**NOTE:** New PJM CLI jar file available for use with SSO [here](#)

- Additional details available in [presentation](#) from 6/14/2023 eDART XML Forum

## ***eDART Train Access***

User accounts in eDART Train will not automatically be set up in AM. Users will need to specify if they desire an account in eDART Train and, if so, CAMs or users can request new eDART accounts in AM Train at <https://edartssotrain.pjm.com>. See steps outlined in **New User Registration Quick Guide** [here](#).

## ***Critical Energy Infrastructure Information (CEII) for eDART Transmission Access***

CEII is required for all Transmission access in eDART. In most cases during migration, CEII will already be in effect/approved for eDART Transmission users; however, auto-generated requests could be sent as new AM accounts are created. It is requested that CAMs inform users to ignore these auto-generated requests for CEII if it is known that CEII is already in effect.

Also, transfer of CEII approval for Transmission users can be addressed during the Bulk Request Process.

## **After Migration**

Migrated users:

- Can only log into eDART via [PJM Tools or the eDART SSO URLs](#):
  - Training: <https://edartssotrain.pjm.com>
  - Production: <https://edartsso.pjm.com>
- Can use SSO 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 Account Manager CAMs for password resets and unlocking accounts

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

## Migration

### Bulk Request vs. Manual Request

CAMs may choose one of two methods to complete the eDART account migration to AM:

- Bulk Request: Done by CAMs with the assistance of the eDART and AM teams
- Manual Request: Done by CAMs or users independently in AM and/or eDART

The following pages outline steps for Bulk Request and Manual Request types.

### eDART User List

To begin the migration process, CAMs can contact [eDARTAccountRequests@pjm.com](mailto:eDARTAccountRequests@pjm.com) to request a list of current eDART users. The table below is a sample eDART user list that will be returned, with data for Company Name, eDART User ID, User Name, eDART Access Type, email, AM User ID (if known), and Migrated User.

COMPANY_NAME	EDART_USER_ID	USER_NAME	EDART_ACCESS	EMAIL	AM_USER_ID	MIGRATED_USER_IF_1
ABC Company	ABCDEF1	John Doe	Generation R/W	johndoe@abcco		0
ABC Company	HIJKLMN2	James Doe	Generation R/W	jamesdoe@abcco	HIJKLMN2	0
ABC Company	OPQSTU3	Jane Doe	Generation R/W	janedoe@abcco		0
ABC Company	VWXUZA4	Ben Sample	Generation and Transmission R/	bensample@abcco		0
ABC Company	BBCDDEE5	Brian Sample	Generation and Transmission R/	briansample@abcco	benefits09	0
ABC Company	FFGGHHIJ6	Becky Sample	Generation and Transmission R/	beckysample@abcco		0

CAMs are asked to research and confirm AM Usernames in Account Manager, and enter them in the AM\_USER\_ID column. Upon completion, CAMs can choose to request eDART access in Account Manager themselves (see Manual Request steps below), or contact [eDARTAccountRequests@pjm.com](mailto:eDARTAccountRequests@pjm.com) to pursue the Bulk Request process (see Bulk Request steps below).

If eDART user does not have an account in Account Manager, CAMs will need to Add New PJM User Account (see [New User Registration Guide](#), **How to Add A New PJM User Account as a CAM Admin**). These steps are also outlined under **Manual Requests** in this guide.

## Common Scenarios

The table below outlines common scenarios that CAMs may encounter or question during migration with suggested course of action to follow:

User	eDART Username	AM Username	User/System	Action
<b>Scenario 1:</b> Usernames match between eDART and Account Manager				
John Doe	J_doe123	J_doe123	User	Request eDART access for J_doe123 in AM
<b>Scenario 2:</b> Usernames do not match between eDART and Account Manager				
Jane Doe	JaneDoe	JaneDoe1	User	Request eDART access for JaneDoe1 in AM  Submit User Request to copy JaneDoe access to JaneDoe1 (optional)  Submit <a href="#">request to revoke</a> JaneDoe in eDART
<b>Scenario 3:</b> eDART user does not have an AM account and eDART username is valid for AM				
Robert Doe	Bob_Doe	-	User	Create new AM account with username Bob_Doe and request eDART access
<b>Scenario 4:</b> eDART user does not have an AM account and eDART username is not valid for AM (too short and has invalid special character)				
Janet Doe	J#Doe	-	User	Create new AM account and request eDART access

User	eDART Username	AM Username	User/System	Action
				Submit User Request to copy J#Doe access to new username (optional)  Submit <a href="#">request to revoke</a> J#Doe in eDART
<b>Scenario 5:</b> App_Doe is a system account in AM but being used for UI access in eDART				
App Doe	App_Doe	App_Doe	System	Create new user account for UI access and request eDART access  Request eDART access for App_Doe
<b>Scenario 6:</b> eDART user account is under eDART Generic but user has a CAM in AM				
Support Doe	SuppDoe (under eDART Generic)	SuppDoe (under Company Doe)		Request eDART Generic access for SuppDoe under Company Doe
<b>Scenario 7:</b> eDART user account is under eDART Generic and user has no CAM in AM				
Support1 Doe	Supp1Doe (under eDART Generic)	Supp1Doe (no CAM)		Request eDART Generic access for Supp1Doe under Other

## Bulk Request Process

Bulk request process is available for CAMs to request eDART access and is encouraged for use for companies with 25+ eDART users to migrate. Bulk request can be used for both user and system accounts in AM Production, and CAMs work with members of the eDART team to prepare a .csv file for upload and processing in AM. CAMs should contact [eDARTAccountRequests@pjm.com](mailto:eDARTAccountRequests@pjm.com) to proceed with Bulk Request.

<b>Bulk Requests: eDART Accounts</b>				
<b>Step</b>	<b>Task</b>	<b>Owner</b>	<b>Instruction</b>	<b>Notes</b>
<b>B1</b>	Request current eDART user list	CAM	Contact eDART team at <a href="mailto:eDARTAccountRequests@pjm.com">eDARTAccountRequests@pjm.com</a> to request list of current eDART users	
		eDART Team	Generate and forward current eDART user list to CAM	
<b>B2</b>	Review & update eDART user list	CAM	Review spreadsheet to confirm if users will be migrated or not <ul style="list-style-type: none"> <li>Submit <a href="#">Revoke Access</a> request for users who will <u>not</u> be migrated</li> </ul>	
<b>B3</b>	Search for accounts in AM	CAM	Log In to AM Production ( <a href="#">SSO Sign In</a> ) <ul style="list-style-type: none"> <li>Search for user in AM to determine if user has an account in AM</li> </ul>	
		CAM	<b>If eDART user has AM Account:</b> <ul style="list-style-type: none"> <li>Identify user's AM Username</li> <li>Enter AM Username in spreadsheet under AM_User_ID column</li> </ul>	

<b>Bulk Requests: eDART Accounts</b>				
<b>Step</b>	<b>Task</b>	<b>Owner</b>	<b>Instruction</b>	<b>Notes</b>
		CAM	<b>If eDART user does <u>not</u> have AM Account:</b> <ul style="list-style-type: none"> <li>Make note on spreadsheet that there is no AM Account</li> </ul>	
<b>B4</b>	Review & finalize spreadsheet for bulk request processing	CAM	Contact eDART team at <a href="mailto:eDARTAccountRequest@pjm.com">eDARTAccountRequest@pjm.com</a> to request meeting to review spreadsheet	
		CAM, eDART Team	Review and finalize spreadsheet: <ul style="list-style-type: none"> <li>Address users with no AM account</li> <li>Identify cases to copy access (usernames don't match)</li> <li>Identify where transfers of CEII approval applies (Transmission users only)</li> <li>Identify transfers of customized access</li> </ul>	
<b>B5</b>	Create .csv file	eDART Team	Create .csv file with list for user access, listing Username and Access	
<b>B6</b>	Submit Bulk Request	eDART & AM Team	Submit Bulk Request .csv file for processing	See <a href="#">presentation</a> , <b>User Access Migration – Bulk Option</b>
<b>B7</b>	Finalize eDART setup in AM	CAM	Approve requests in AM	Note that bulk approval process does not apply and CAMs will need to approve requests on an individual basis.

<b>Bulk Requests: eDART Accounts</b>				
<b>Step</b>	<b>Task</b>	<b>Owner</b>	<b>Instruction</b>	<b>Notes</b>
		CAM	Submit any additional requests for users via eDART	See <a href="#">presentation</a> , <b>User Access Migration – Additional Requests</b>
		eDART Team	Complete provisioning, if needed	

## Manual Request Process

Manual request process steps apply for both eDART user and system accounts in Production and Train. CAMs can either request eDART Access in AM for their eDART users, or delegate responsibility directly to user(s) in their company to request eDART access in AM for their own individual accounts.

<b>Manual Requests – eDART Accounts:</b>				
<b>Step</b>	<b>Task</b>	<b>Owner</b>	<b>Instruction</b>	<b>Notes</b>
<b>M1</b>	Request current eDART user list <i>(optional)</i>	CAM	Contact eDART team at <a href="mailto:eDARTAccountRequest@pjm.com">eDARTAccountRequest@pjm.com</a> to request list of current eDART users <ul style="list-style-type: none"> <li>Indicate if request is for eDART Production or Training</li> </ul>	
		eDART Team	eDART Team returns current eDART user list to CAM	

<b>Manual Requests – eDART Accounts:</b>				
<b>Step</b>	<b>Task</b>	<b>Owner</b>	<b>Instruction</b>	<b>Notes</b>
<b>M2</b>	Review, update, and finalize list of eDART users for migration	CAM	Review spreadsheet to confirm if users listed should be migrated or not <ul style="list-style-type: none"> <li>Submit <a href="#">Revoke Access</a> request for users who will <u>not</u> be migrated</li> </ul>	
<b>M3</b>	eDART Train Account Needed	CAM	Confirm with user if they require an eDART Train account (PJM User or System)	Refer to eDART Train
<b>M4</b>	Search for accounts in AM	CAM/user	Log In to AM Production ( <a href="#">SSO Sign In</a> ) <ul style="list-style-type: none"> <li>Search AM to determine if user has an account in AM</li> </ul>	
<b>M5</b>	Add eDART Access to existing AM Account	CAM/user	<b>If eDART user has AM Account:</b> <ul style="list-style-type: none"> <li>Identify user’s AM Account</li> </ul>	See ‘ <b>User Profile – Account Access</b> ’ section of the <b>User Account Management Quick Guide</b> <a href="#">here</a>
<b>M6</b>	Add eDART Role(s)	CAM/user	<b>If usernames match:</b> <ul style="list-style-type: none"> <li>Click <b>Request Access</b></li> <li>Select appropriate eDART access role for user</li> <li>Add Account(s)</li> <li>Click <b>Submit</b></li> </ul>	See <a href="#">presentation</a> at <b>User Access Migration – eDART Roles</b> See ‘ <b>User Profile – Account Access</b> ’ section of the <b>User Account</b>

<b>Manual Requests – eDART Accounts:</b>				
<b>Step</b>	<b>Task</b>	<b>Owner</b>	<b>Instruction</b>	<b>Notes</b>
				<b>Management Quick Guide <a href="#">here</a></b>
<b>M7</b>			<p><b>If usernames do <u>not</u> match:</b></p> <ul style="list-style-type: none"> <li>• Follow steps outlined above in M6</li> <li>• Send email to <a href="mailto:eDARTAccountRequests@pjm.com">eDARTAccountRequests@pjm.com</a> to request 'copy' of the eDART Legacy User ID to the new AM Username <u>or</u> request 'copy' directly in eDART (Legacy) following steps outlined below at <b>Adding Additional Requests via eDART</b></li> </ul>	
<b>M8</b>	Create new AM Account, add eDART Access	CAM/user	<p><b>If eDART user does <u>not</u> have AM Account:</b></p> <ul style="list-style-type: none"> <li>• Follow New User Registration Quick Guide to add new user to AM</li> <li>• Request appropriate eDART Access role for user</li> <li>• Be sure to:               <ul style="list-style-type: none"> <li>○ use eDART Username for new AM Account and</li> <li>○ select same eDART Access as what user currently has in eDART (<i>e.g., Transmission Read Only, etc.</i>)</li> </ul> </li> </ul>	See <b>New User Registration Quick Guide <a href="#">here</a></b>
<b>M9</b>	Finalize eDART setup in AM	CAM	Approve request(s) in AM	See <a href="#">presentation</a> at <b>User Access Migration – Bulk Option</b>

<b>Manual Requests – eDART Accounts:</b>				
<b>Step</b>	<b>Task</b>	<b>Owner</b>	<b>Instruction</b>	<b>Notes</b>
		CAM	Submit any additional requests for users via eDART	See <a href="#">presentation</a> at <b>User Access Migration – Bulk Option</b>
		eDART Team	Complete provisioning, if needed (e.g., confirm CEI approval)	

**Adding Additional Requests via eDART** (e.g., Copy eDART Legacy User ID to new AM Username, Hydro Calculator, Nuclear Voltage Limits)

<b>Additional Requests: eDART User Accounts</b>				
<b>Step</b>	<b>Task</b>	<b>Owner</b>	<b>Instruction</b>	<b>Notes</b>
<b>AR1</b>	Log In	CAM	<ul style="list-style-type: none"> <li>Log into eDART</li> <li>Click My eDART</li> </ul>	See <a href="#">presentation</a> at <b>User Access Migration – Bulk Option</b>
<b>AR2</b>	Add New	CAM	<ul style="list-style-type: none"> <li>Click on User Request &gt; Add New</li> </ul>	
<b>AR3</b>	Submit	CAM	<ul style="list-style-type: none"> <li>Select user</li> <li>Enter request</li> </ul>	

<b>Additional Requests: eDART User Accounts</b>				
<b>Step</b>	<b>Task</b>	<b>Owner</b>	<b>Instruction</b>	<b>Notes</b>
			<ul style="list-style-type: none"> <li>Submit form</li> </ul>	
<b>AR4</b>	Submit	CAM	<ul style="list-style-type: none"> <li>Select user</li> <li>Enter request</li> <li>Submit form</li> </ul>	

## eDART Train Access in AM

<b>eDART Accounts in Train</b>				
<b>Step</b>	<b>Task</b>	<b>Owner</b>	<b>Instruction</b>	<b>Notes</b>
<b>T1</b>	Search for accounts in AM Train	CAM/user	Log In to AM Train ( <a href="#">SSO Sign In</a> ) <ul style="list-style-type: none"> <li>Search AM to determine if user has an account in AM Train</li> </ul>	
<b>T2</b>	Add eDART Access to existing AM Account	CAM/user	<b>If eDART user has AM Account:</b> <ul style="list-style-type: none"> <li>Identify user's AM Account</li> </ul>	See 'User Profile – Account Access' section of the <b>User Account Management Quick Guide</b> <a href="#">here</a>

<b>eDART Accounts in Train</b>				
<b>Step</b>	<b>Task</b>	<b>Owner</b>	<b>Instruction</b>	<b>Notes</b>
<b>T3</b>	Add eDART Role(s)	CAM/user	<p><b>If usernames match:</b></p> <ul style="list-style-type: none"> <li>• Click Request Access</li> <li>• Select appropriate eDART access role for user</li> <li>• Add Account(s)</li> <li>• Click <b>Submit</b></li> </ul>	<p>See <a href="#">presentation</a> at <b>User Access Migration – eDART Roles</b></p> <p>See ‘<b>User Profile – Account Access</b>’ section of the <b>User Account Management Quick Guide <a href="#">here</a></b></p>
<b>T4</b>	Create new AM Account, add eDART Access	CAM/user	<p><b>If eDART user does <u>not</u> have AM Account:</b></p> <ul style="list-style-type: none"> <li>• Follow steps outlined in New User Registration Quick Guide to add new user to AM</li> <li>• Request appropriate eDART Access role for user.</li> <li>• Be sure to:               <ul style="list-style-type: none"> <li>○ use eDART Username for new AM Account and</li> <li>○ select same eDART Access as what user currently has in eDART (<i>e.g., Transmission Read Only, etc.</i>)</li> </ul> </li> </ul>	<p>See <b>New User Registration Quick Guide <a href="#">here</a></b></p>
<b>T5</b>	Finalize eDART setup in AM	CAM	Approve requests in AM Train	<p>See <a href="#">presentation</a> at <b>User Access Migration – Bulk Option</b></p>
<b>T6</b>	Add Additional Requests	CAM	Submit any additional requests for users via eDART	<p>See <a href="#">presentation</a> at <b>User Access Migration – Additional Requests</b></p>

<b>eDART Accounts in Train</b>				
<b>Step</b>	<b>Task</b>	<b>Owner</b>	<b>Instruction</b>	<b>Notes</b>
T7	Provision	eDART Team	Complete provisioning, if needed (e.g., confirm CEII approval)	

## References

- [Revoke Access \(Legacy\)](#) form
- Migration to Account Manager [FAQ](#)
- [Presentation](#), Special eDART Forum – Account Manager: 2/22/2023
- [Presentation](#), Special eDART Forum – Account Manager: 6/23/2023
- Account Manager [New User Registration Quick Guide](#)
- Account Manager [User Account Management Quick Guide](#)
- eDART Support: [eDARTAccountRequests@pjm.com](mailto:eDARTAccountRequests@pjm.com)