



Single User Multi-Account (SUMA) for PJM Tools

Kevin Bonner

March 22, 2018

- Provides the ability to link multiple company accounts and SUMA enabled tool access to a single primary user account.
- Allows for different levels of access across accounts
- Users may create a new user account or convert an existing user account as their primary SUMA account for which all other company accounts and tool access can be linked to.
- One account password to manage
- Users can move between company accounts securely without having to login each time.

- Only the primary account will have the default tools access
- All tool access requests would require approval from the company CAM
- Both SUMA enabled and non SUMA enabled tools can be requested for the Primary account
- Only SUMA enabled tools can be requested for the Secondary accounts

- Account Manager
- Billing Line Item Transfer
- Bulletin Board
- DR Hub
- ExSchedule
- FTR Center
- InSchedule
- Markets Gateway
- MSRS
- Planning Center-Gen Model
- Planning Center-Queue Point
- Power Meter
- Resource Tracker

- Login to <https://etools.pjm.com>
- Click on 'Manage my tools' link on the left hand side of the page
- Click on "Request Access" on Account Access tab

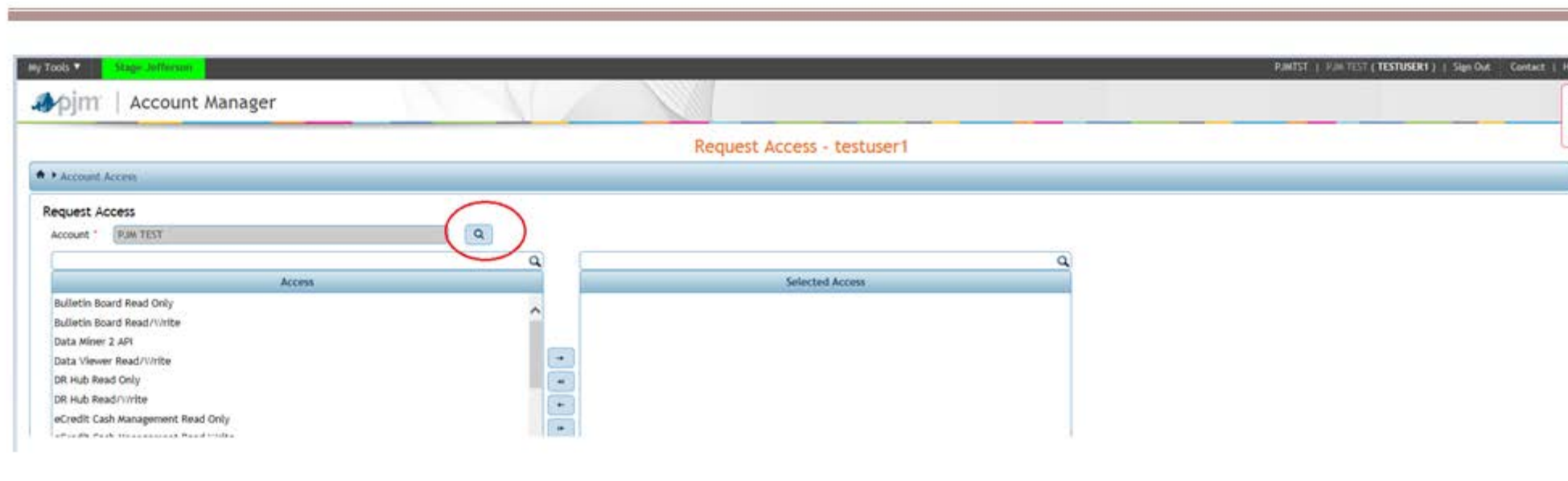


The screenshot shows the 'Account Manager' interface for user 'stg_user9'. The 'Account Access' tab is active, displaying a table of current account and tool access. A 'Request Access' button is highlighted with a red box.


Account ID	Account	Account Shortname
3	PECO Energy Company	PE

Tool	Access Type	Effective Date	Terminate Date	Actions
Account Manager	Read/Write	10/18/2017	01/12/2018	

- Your employer account will be displayed by default
- Use the magnifying glass to select a different company account



- Type Account name in the box, hit “Enter” to filter. Select the account you wish to request access for and click on “Submit”



Account	
<input type="radio"/>	PJM (LS Power)
<input checked="" type="radio"/>	PJM TEST
<input type="radio"/>	PJM TEST2
<input type="radio"/>	PJM Test 5
<input type="radio"/>	PJM Test3

(1 of 1)

Cancel Submit

- Select the application and click on the arrow. Only SUMA enabled apps will be displayed on this page.



Account Manager | Account Manager

Request Access - testuser1

Account Access

Request Access

Account * PJM TEST2

Access	Selected Access
Account Manager Read/Write	
Billing Line Item Transfer Read Only	
Billing Line Item Transfer Read/Write	
Bulletin Board Read Only	
Bulletin Board Read/Write	
ExSchedule Read Only	
ExSchedule Read/Write	
InSchedule Read Only	
InSchedule Read/Write	
Power Meter Read/Write	
Resource Tracker Read/Write	

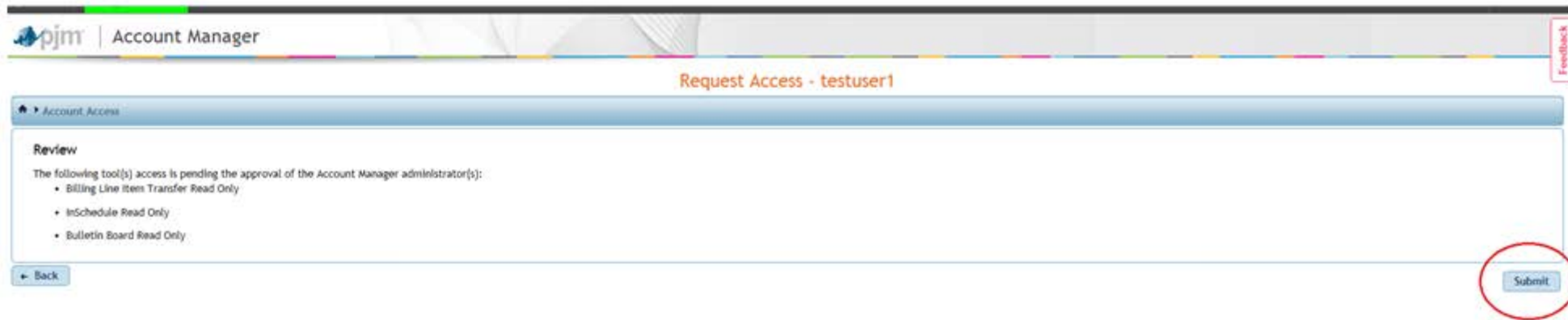
Comments:

Please use the comments field to provide information to the Customer Account Manager to help determine what access you require.

Feedback

Next

- Verify the access and click on “Submit”

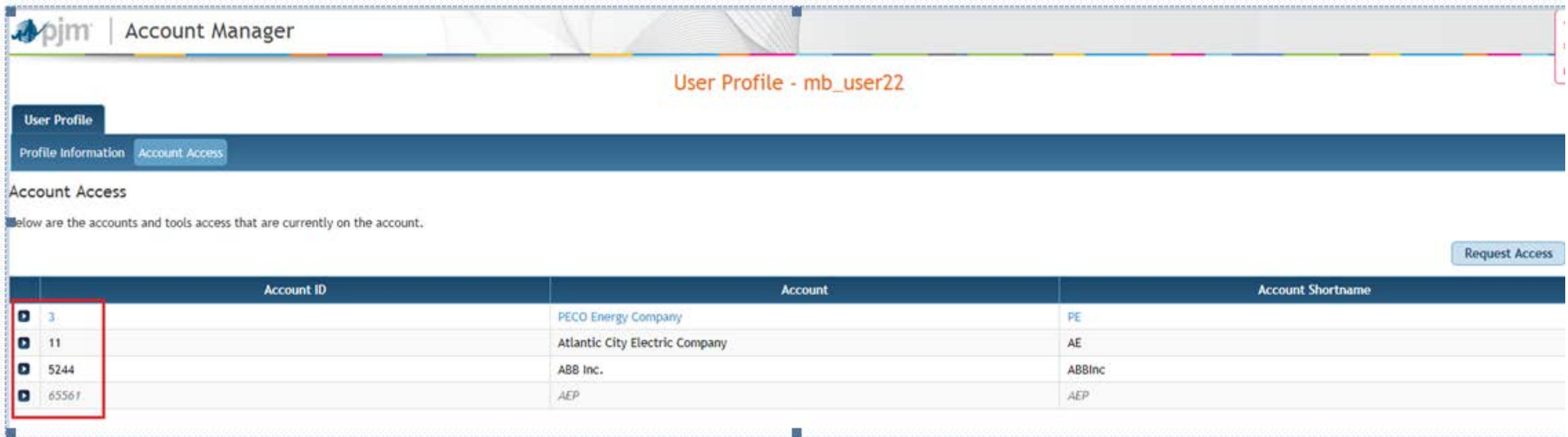


- The tool access request will be pending until CAMs of the company approve or decline.

Note: Once your SUMA account has been setup appropriately, please terminate accounts that will no longer be used.

Accessing Account Manager as SUMA user

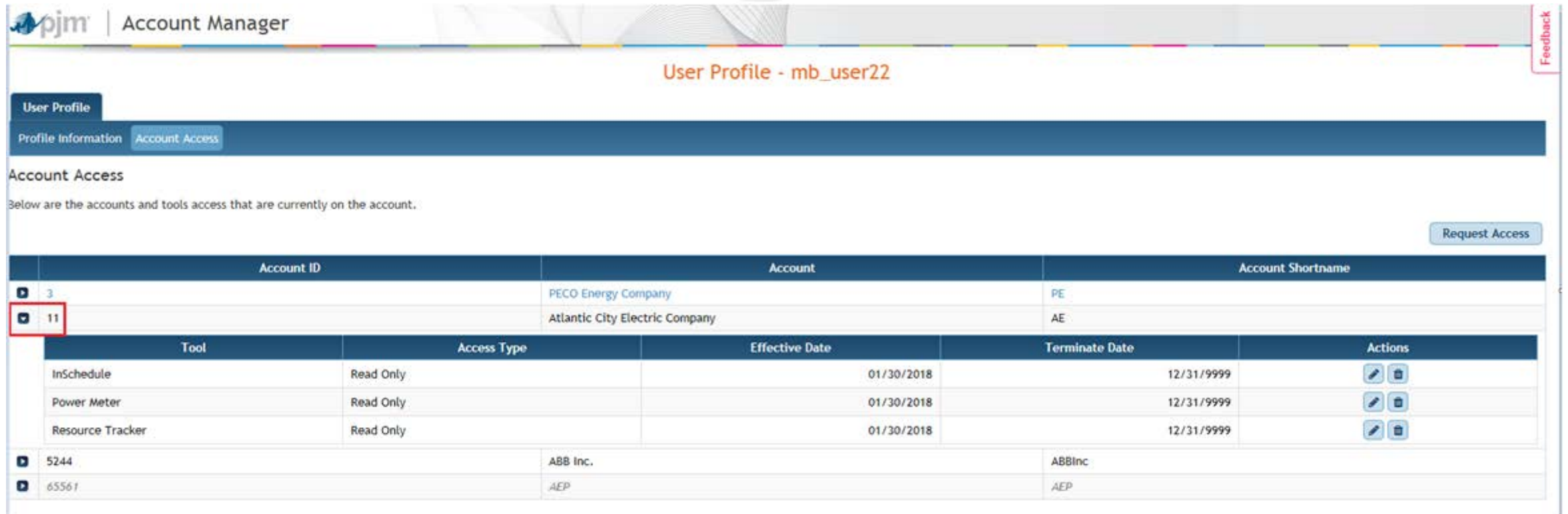
- Once the access is approved it can be viewed from the User's Profile page in Account Manager.
- The primary company account will be in blue font and all secondary company accounts will be in black font.



The screenshot shows the 'User Profile - mb_user22' page in the PJM Account Manager. The 'Account Access' tab is selected, displaying a table of accounts and tools access. The primary account, PECO Energy Company, is highlighted in blue font. A red box highlights the 'Account ID' column for the first four rows.

Account ID	Account	Account Shortname
3	PECO Energy Company	PE
11	Atlantic City Electric Company	AE
5244	ABB Inc.	ABBInc
65561	AEP	AEP

- Click on the arrow next to the Account ID to expand and see the tool access the user has for that company account.



Account Manager | User Profile - mb_user22







User Profile | Profile Information | **Account Access**

Account Access

Below are the accounts and tools access that are currently on the account.

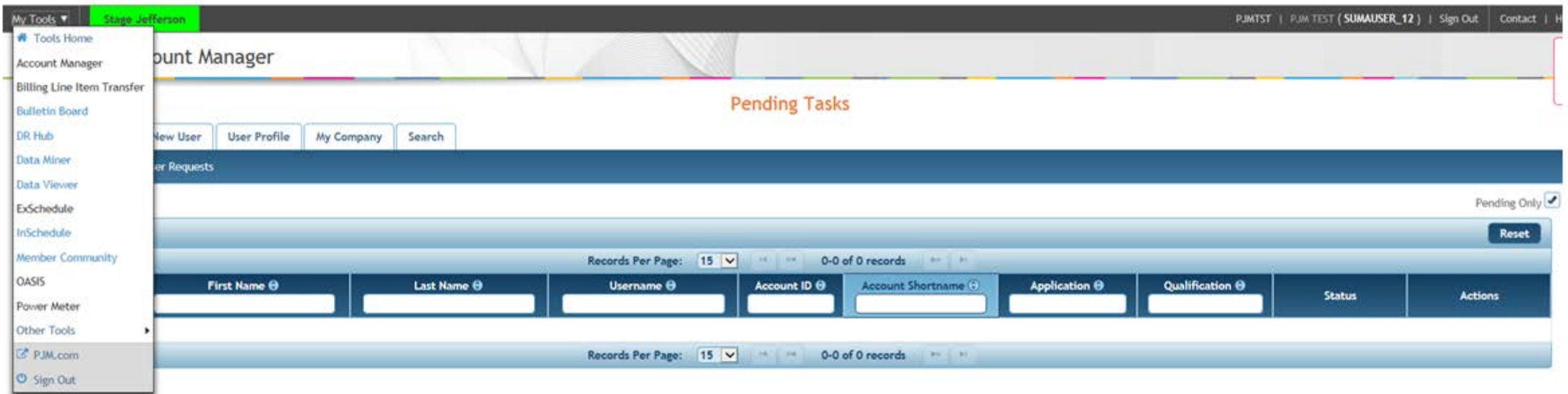
[Request Access](#)

Account ID	Account	Account Shortname
3	PECO Energy Company	PE
11	Atlantic City Electric Company	AE

Tool	Access Type	Effective Date	Terminate Date	Actions
InSchedule	Read Only	01/30/2018	12/31/9999	 
Power Meter	Read Only	01/30/2018	12/31/9999	 
Resource Tracker	Read Only	01/30/2018	12/31/9999	 

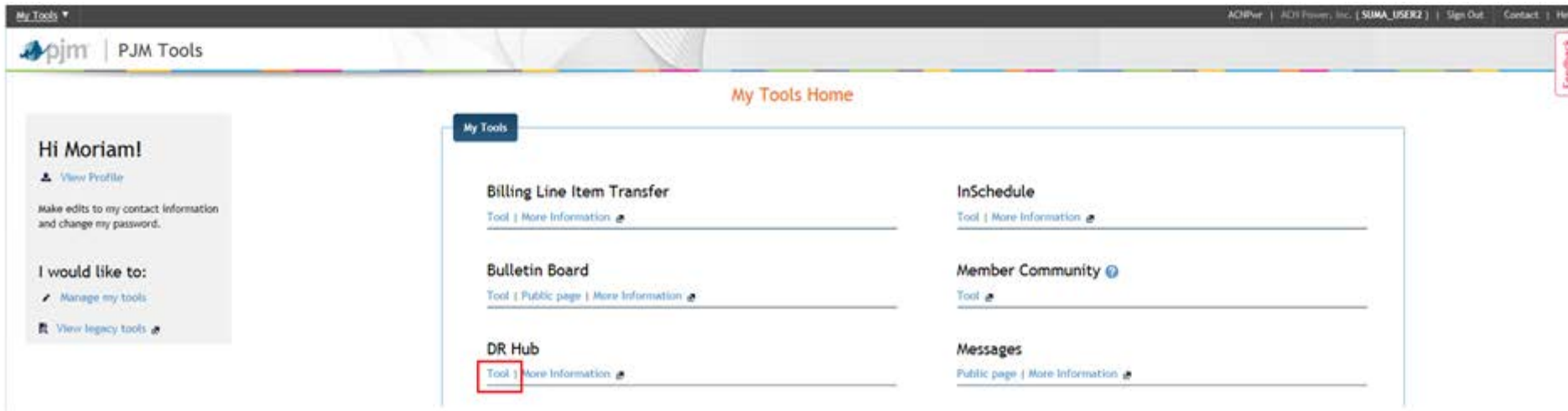
5244	ABB Inc.	ABBInc
65561	AEP	AEP

- Click on “My Tools” dropdown menu.
- My Tools dropdown displays the combined access for the users Primary and all Secondary accounts.
 - The tools on the primary accounts (employer account) are displayed under Tools Home in blue.
 - The tools only on the secondary accounts are displayed under Tools Home in black.
 - The tools that are on both primary and secondary accounts are displayed under Tools Home in blue. Public tools (Bulletin Board, Data Miner API, Gas Pipe, Messages) are displayed under Other Tools - in blue if the user has access to it. Black if it is a default access.

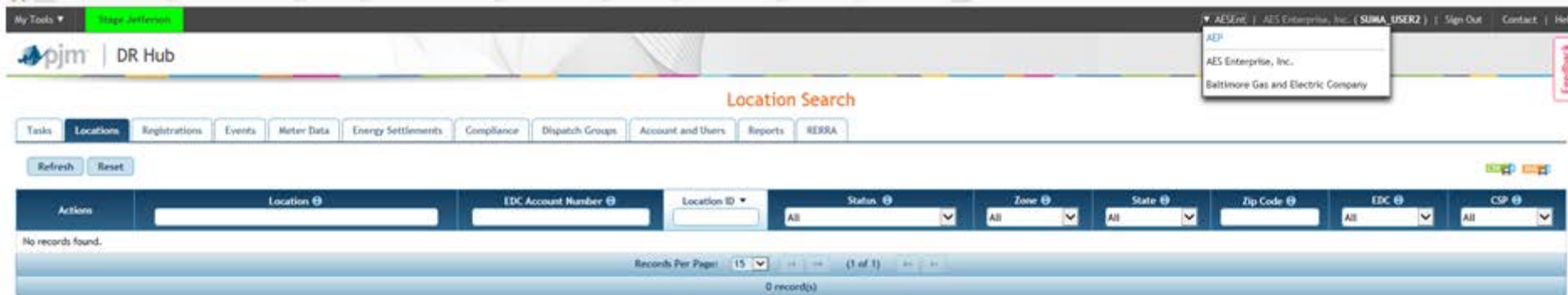


The screenshot shows the PJM user interface. At the top left, the 'My Tools' dropdown menu is open, listing various tools such as 'Tools Home', 'Account Manager', 'Billing Line Item Transfer', 'Bulletin Board', 'DR Hub', 'Data Miner', 'Data Viewer', 'ExSchedule', 'InSchedule', 'Member Community', 'OASIS', 'Power Meter', and 'Other Tools'. Below the dropdown, the main content area displays a 'Pending Tasks' table. The table has columns for 'First Name', 'Last Name', 'Username', 'Account ID', 'Account Shortname', 'Application', 'Qualification', 'Status', and 'Actions'. The table is currently empty, showing '0-0 of 0 records'. A 'Reset' button is visible in the top right corner of the table area.

- User may access all their company accounts and tools associated with their SUMA user account from single login
- Login to [Tools Home](#) page with SUMA user credentials
- User will be logged into PJM My Tools Home page. This page displays combined access for the user Primary and all Secondary accounts. Select the “Tool” link to launch the application.

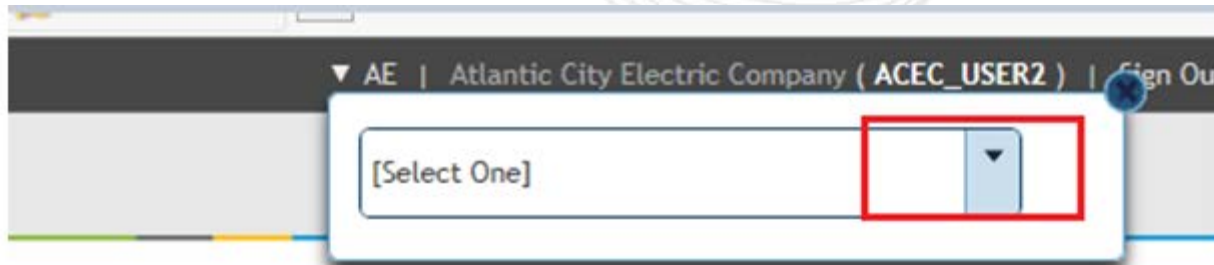


- Application should be launched. Top right hand corner of the page will display the company Short and Long name.
- If more than one account has access to the application, a dropdown list will be available to change accounts

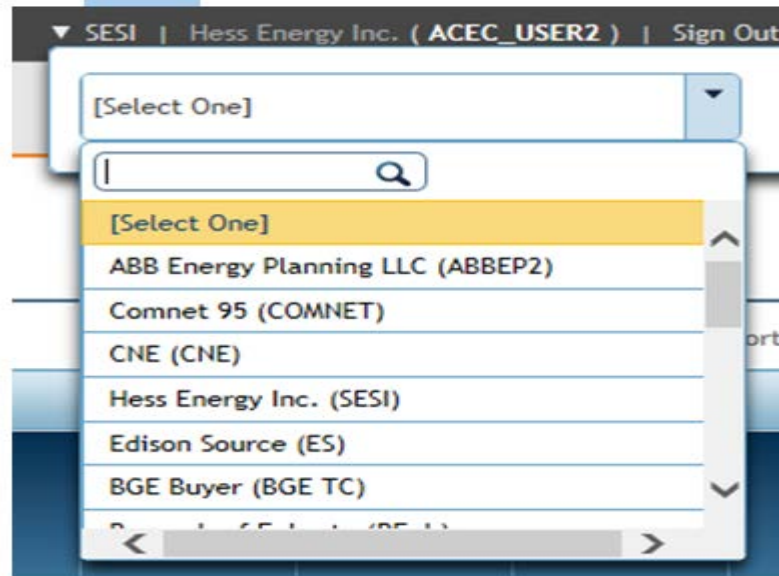


Accessing PJM Tools as a SUMA user

- If more than ten accounts have access the menu will have sub-menus
- User may type in the company account name or shortname select from the dropdown menu inside the box.



- If user clicks on the dropdown menu inside the box, below is the screenshot how it would look.



- User must use CLI version 1.3.0 or higher
- When using the CLI or browserless by default the employer account will be used (primary).
- To perform any actions for other accounts linked to the SUMA user there is an additional HTTP header which can be set to override the default behavior
- HTTP Header
 - Suma-Account
 - Short name of company account
- If using the CLI there is an optional flag in the setenv.cmd file
 - REM (Optional) If you are a SUMA user and have multiple accounts set the specific set ACCOUNT=-h Suma-Account=<company short name>
 - REM e.g. set ACCOUNT=-h Suma-Account=PE

Document Name	Link
Account Manager User Guide	http://www.pjm.com/-/media/etools/account-manager/account-manager-user-guide.ashx?la=en
Account Manager FAQ	http://www.pjm.com/-/media/etools/account-manager/account-manager-faqs.ashx?la=en
SUMA User & CLI Guide	http://www.pjm.com/-/media/etools/account-manager/suma-user-and-cli-guide.ashx?la=en
SUMA Working Session Recording 3/13/18	https://pjm.webex.com/pjm/ldr.php?RCID=7579550e9bd1cd6b4eefb2f494e2eb10