

Single User Multi-Account (SUMA) Quick Start Guide

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Overview

Single User Multiple Account (SUMA) provides the ability to link multiple accounts and SUMA enabled tool access to a single primary user account.

Users may create a new user account or convert an existing user account as their primary SUMA account for which all other accounts and tool access will be linked to. Once the user account has been created or selected, SUMA functionality will allow users to request company account access to other accounts and tools under the same user.

Rules

- The primary account is the only account that will have the default tools access. Default tools are: Data Miner API, Member Community public, and My PJM public
- 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

Benefits of using Single User Multi Account (SUMA):

- One account password to manage
- User experience – users can move between company accounts securely without having to login each time.

Section 1: Steps to create new Single User Multi Account (SUMA)

This section identifies the steps to create a new SUMA user account.

Note: Member CAM(s) that are CAM(s) to multiple accounts and want to link them under a single user account should submit a new CAM Form B/B1. As part of the process, the CAM(s) should identify a primary account that will be used to provide default access as well as for auditing purposes. Once the PJM CAM(s) receive the completed CAM Form B/B1, they should work with the Member CAM(s) to create the new SUMA user account.

1. Navigate to eTools.pjm.com
2. Click on the Register link

Sign in

Username:

Password:

Log In

Forgot Password

Register

NOTICE: This system and the information processed or contained within is for the use of authorized users only. At any time, and for any lawful purpose, PJM may monitor, intercept, record and search any communications or data transiting or stored on this information system. At PJM's sole discretion, PJM may disclose pertinent information to the U.S. Government and its authorized representatives to protect the security of critical infrastructure and key resources, ensure information security, or to comply with any applicable law, regulation, legal process, or enforceable governmental request. User expressly consents to the terms and conditions contained in this notice. User has no reasonable expectation of privacy regarding communications or data transiting or stored on this information system. Unauthorized use of this system may be subject to criminal prosecution or civil proceedings.

3. Fill out the registration form for creating a user. When completed, select "Next"

Welcome to the New User Registration for PJM's suite of tools.
To register for a PJM account, please complete the following information. If you already have an account, please select the "Sign in to an existing account" link to sign in.

Sign in to an existing account

Account Access

Select the member accounts below for which you will need tool access.

If your account is not in the list below, please select the checkbox and enter the appropriate name.

Account
<input checked="" type="radio"/> PJM TEST
<input type="radio"/> PJM TEST2
<input type="radio"/> PJM Test 6
<input type="radio"/> PJM Test3

(1 of 1)

- Select company and click on 'Next'. This will be the primary account and it will receive the default tools access under this company.

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Select the member accounts below for which you will need tool access.

If your account is not in the list below, please select the checkbox and enter the appropriate name.

Account
<input checked="" type="radio"/> PJM TEST
<input type="radio"/> PJM TEST2
<input type="radio"/> PJM Test 6
<input type="radio"/> PJM Test3

(1 of 1)

- Select tools access and click on 'Next'

Welcome to the New User Registration for PJM's suite of tools.
To register for a PJM account, please complete the following information. If you already have an account, please select the "Sign in to an existing account" link to sign in.

Sign in to an existing account

Request Access

I don't need tool access.

Access	Selected Access
Account Manager Read/Write	Bulletin Board Read Only
Billing Line Item Transfer Read Only	eCredit Read Only
Bulletin Board Read/Write	
Data Miner Public	
Data Miner 2 API	
Data Viewer Read/Write	
DIR Hub Read/Write	
eCredit Cash Management Read Only	
eCredit Cash Management Read/Write	
eCredit R/W with Collateral	
eCredit Read/Write	
eDataFeed Read Only	
Emergency Procedures Read Only	

eCredit is a Web tool used by PJM Members to view their credit position, allocate credit between both subaccounts and markets within subaccounts (Financial Transmission Rights (FTR), Reliability Pricing Model (RPM) or energy), request collateral refunds, and view/download relevant credit reports.

Comments:

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

- Review the access request and click on 'Submit'

My Tools | Account Manager

Welcome to the New User Registration for PJM's suite of tools.
To register for a PJM account, please complete the following information. If you already have an account, please select the "Sign in to an existing account" link to sign in.

Review

Your account will be created with the following access:

- Data Miner API
- Member Community Public
- My PJM Public

The following access is still pending approval:

- BULLETIN BOARD Read Only
- eCredit Read Only

Back Submit

- The user will receive the following message once registration is complete.

My Tools | Account Manager

Thank you for your request. You will receive an email to create your password. Your Account Manager administrator has also received this request and will be required to grant any access you have requested. Contact PJM if you have any questions regarding your new access.

- An email should be sent to the user to create the password. Password needs to be created before logging in (Next Step)
- Login to <https://etools.pjm.com> with the user created
- Click on 'Manage my tools' link on the left hand side.
- Click on 'Account Access' subtab under 'User Profile'

My Tools | Account Manager

User Profile - sumauser_12

User Profile

Profile Information Account Access

Contact Information

First Name * test

Last Name * user

Title qa

Employer * PJM TEST

Phone * 123-456-7890

Email * moriam.begum@pjm.com

Last Name Change

- Click on Request Access button

pjm | Account Manager

User Profile - sumausar_12

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
2214	PJM TEST	PJMST

Tool	Access Type	Effective Date	Terminate Date	Actions
Data Miner	API	12/13/2017	12/31/9999	
Member Community	Public	12/13/2017	12/31/9999	
My PJM	Public	12/13/2017	12/31/9999	

13. Click on search icon

pjm | Account Manager

Request Access - sumausar_12

Account Access

Request Access

Account: PJM TEST

Access

Selected Access

14. Type the company account name you would like to request access to. Select Account and click on Submit. User is limited to one company selection.

Select Account

Account

pjm test

PJM TEST

PJM TEST2

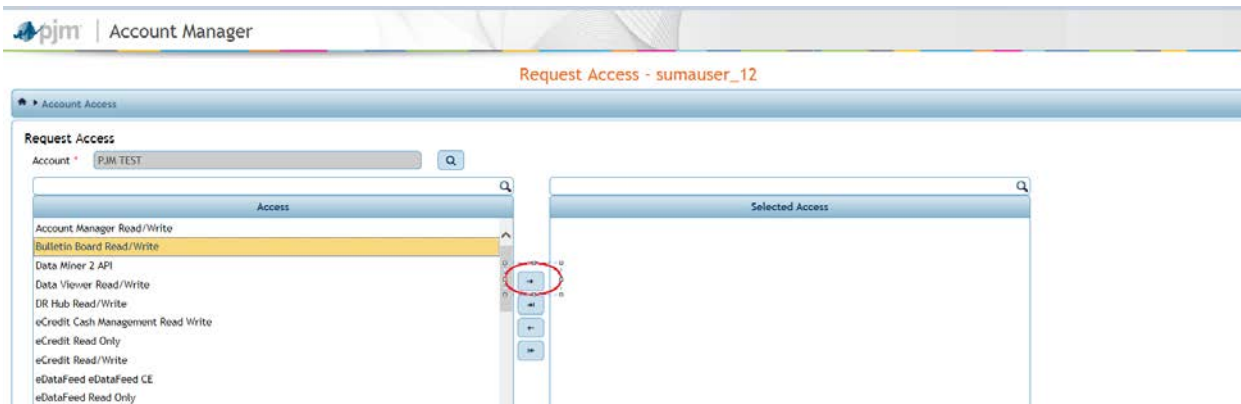
PJM Test 5

PJM Test3

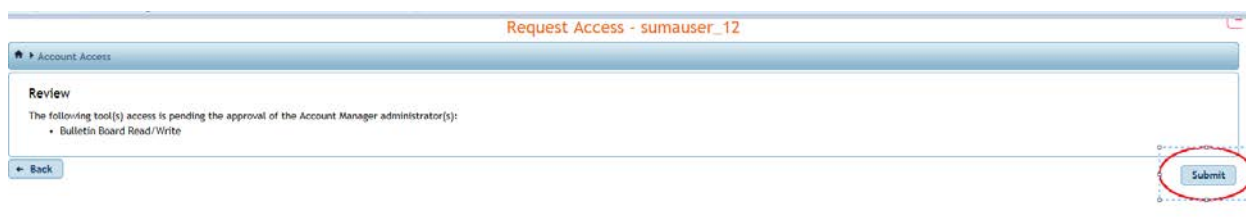
(1 of 1)

Cancel Submit

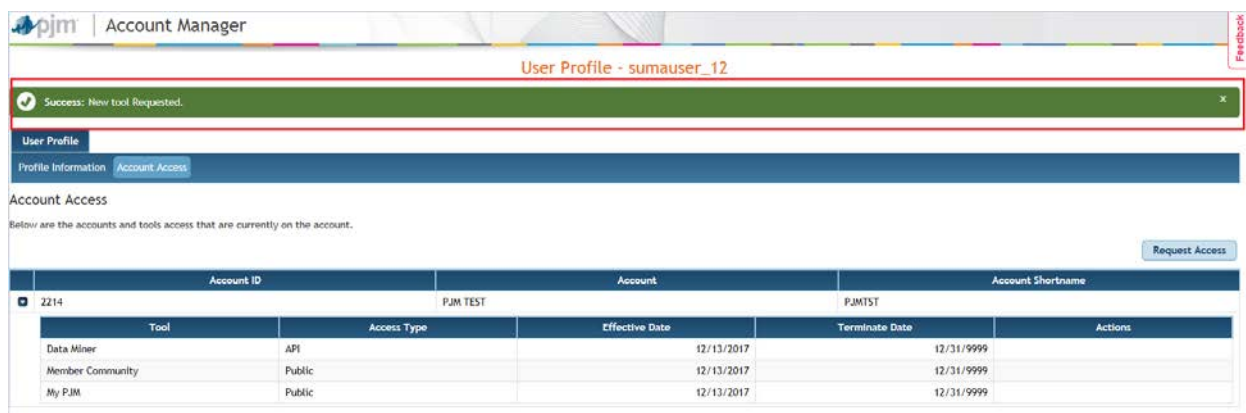
15. Select Tool Access for the account and click "Next" to continue. Only SUMA enabled tools will be displayed on this screen.



16. Review the access request and click on “Submit”



17. User will see a message “Success: New Tool Requested.” Email will be sent to the Company CAM and the user. The tools access request will be pending until the company CAM approves the access.



18. Click on Request Access button and select another - company account you would like to give the user access to. Repeat the steps for adding as many company accounts as you like, only one company account at a time can be added. Note: Users can have different levels of access across accounts. For example, a user can have Read/Write access to company ABC for Tool X and for company DEF they can have Read only access for the same Tool X.

Account Manager

User Profile - sumuser_12

Pending Tasks Add New User User Profile My Company Search

Profile Information Account Access

Account Access

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

Account ID	Account	Account Shortname
2214	PJM TEST	PJMTST
5244	ABB Inc.	ABBInc
12554	PJM TEST2	PJMT2
23763	PJM Test 5	PTST5
1879501	Morian Test Suma	MTS

Request Access

Section 2: Converting an existing user account to a SUMA user account

An existing user who has more than one user account may merge all those user accounts and SUMA enabled tool access into Single User Multi Account. This will allow the user to only manage one account.

To perform this, the user will select a user account that will be their primary and additional user accounts will become their Secondary accounts. Only the primary account will be given the default tools access. If you have an existing SUMA CAM user account, you don't need to make any changes. However, you will now be able to add SUMA enabled Tools to the secondary accounts.

Note: Member CAM(s) that are CAM(s) to multiple accounts and want to link them under a single user account should submit a new CAM Form B/B1. As part of the process, the CAM(s) should identify an existing primary account that will be used to provide default access as well as for auditing purposes. Once the PJM CAM(s) receive the completed CAM Form B/B1, they should work with the Member CAM(s) to create the new SUMA user account.

To merge all your accounts into one SUMA account follow the steps below:

1. Login to <https://etools.pjm.com>
2. Click on 'Manage my tools' link on the left hand side of the page
3. Verify you are on 'Account Access' subtab under 'User Profile'

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.

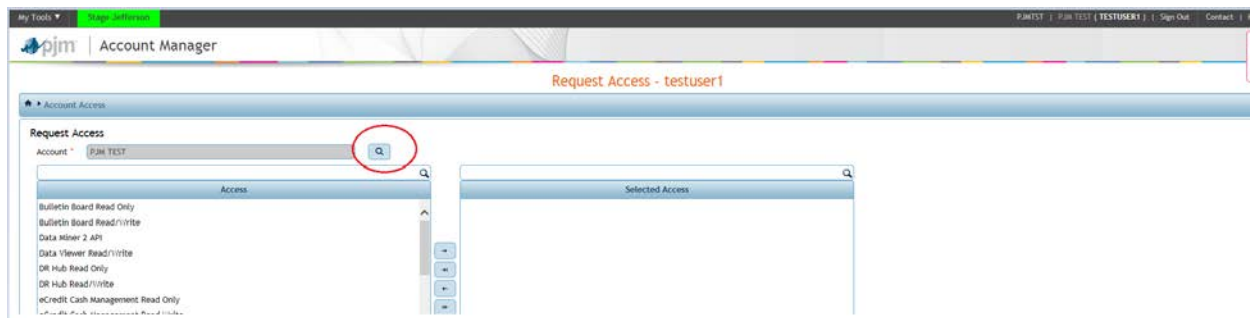
Account ID	Account	Account Shortname
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Request Access

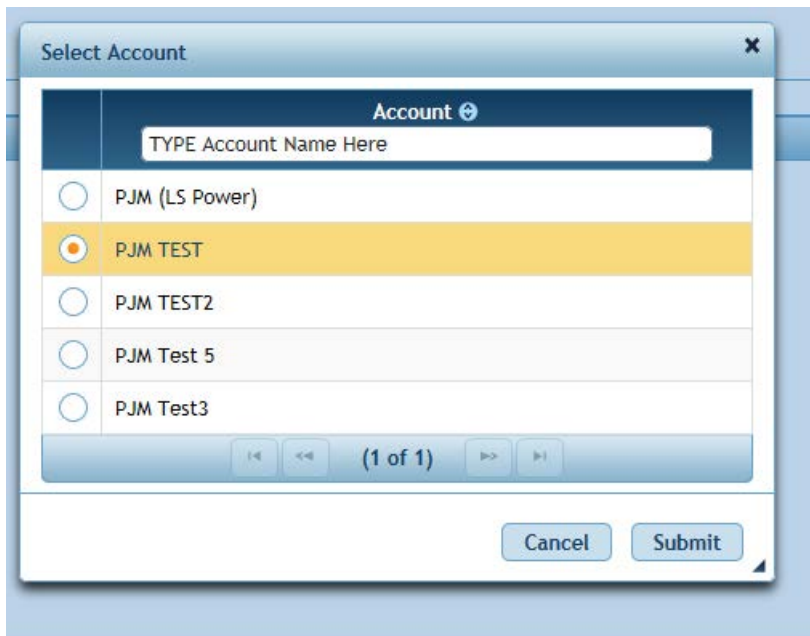
4. Click on "Request Access"



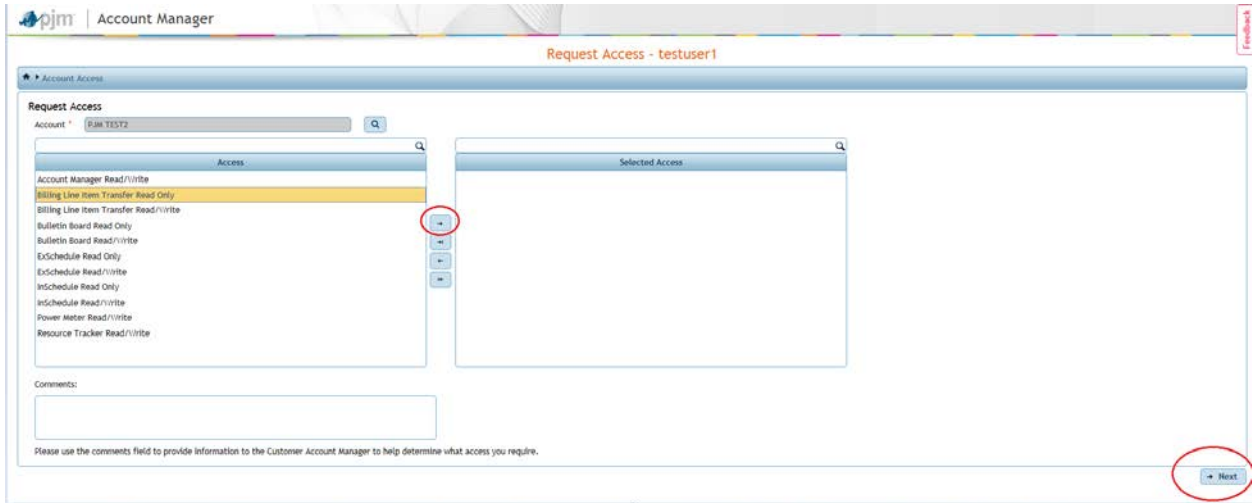
5. Click on the search icon “”



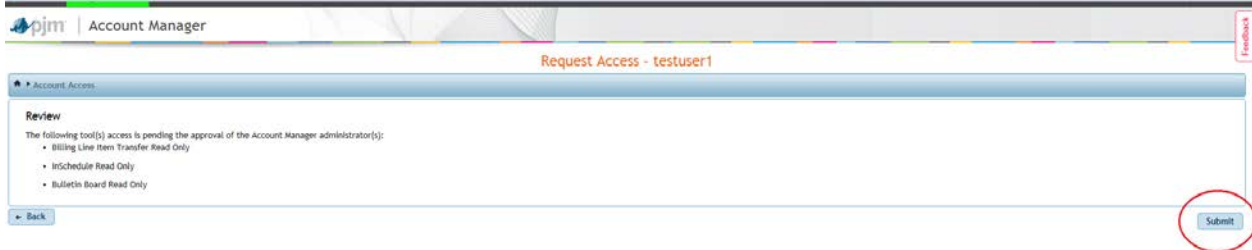
6. Type Account name in the box, hit “Enter” to filter. Select your Account and click on “Submit”



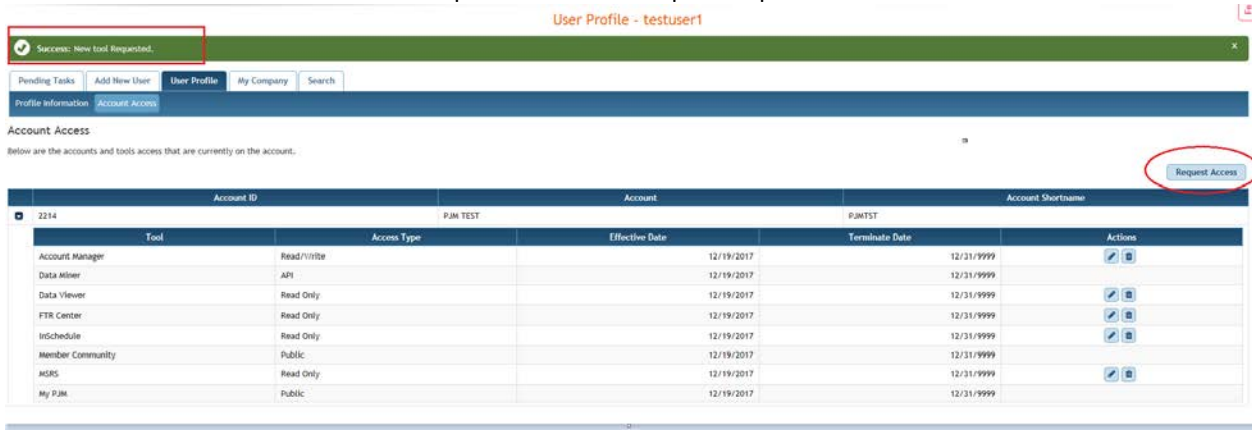
7. Select the application and click on the arrow. Only SUMA enabled tools will be displayed on this page. Please see the [FAQ](#) link for the list of SUMA enabled tools.



8. Verify the access and click on "Submit"



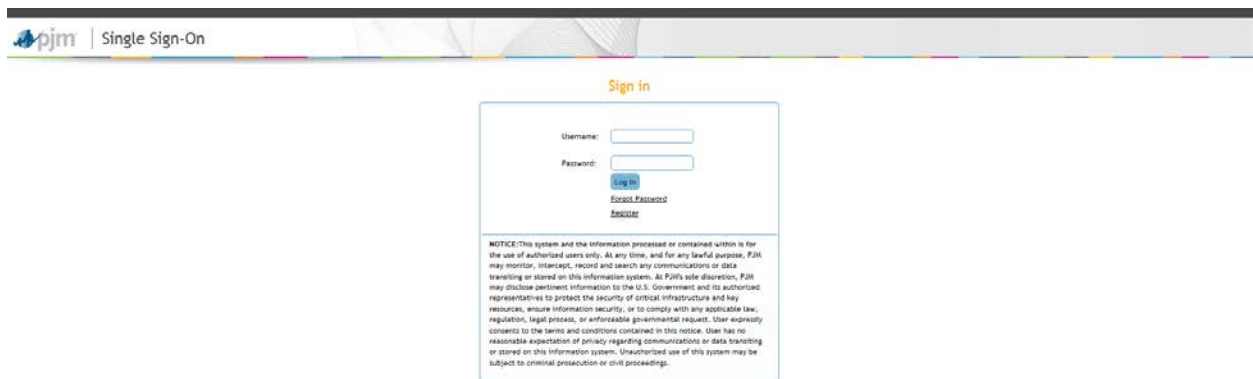
9. User will see a message "Success: New Tool Requested." The tool access request will be pending until CAMs of the company account approves the access. To request for additional accounts and SUMA enabled tool access click on "Request Access" and repeat steps 1-9 above.



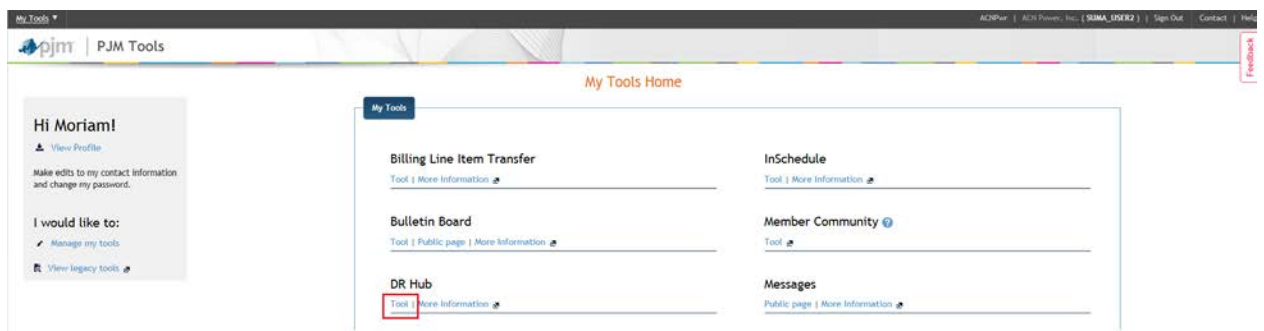
Section 3: Accessing PJM Tools as a Single User Multi Account user

User may access all their company accounts and tools associated with their SUMA user account from single login. To access all the tools as a SUMA user follow the below steps:

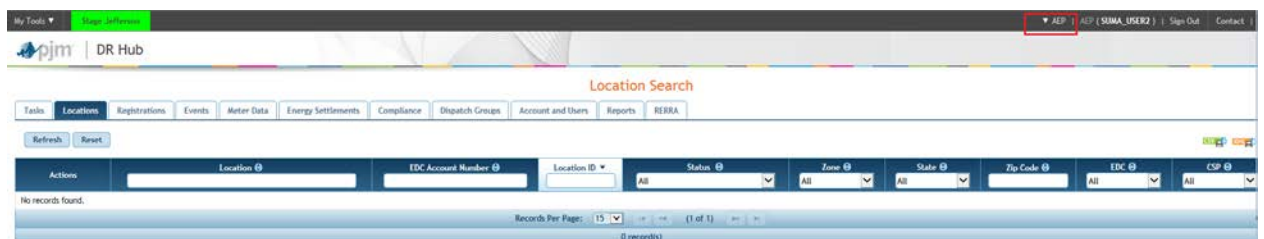
1. Open Web browser and navigate to the Tools Home page – <https://etools.pjm.com>
2. This will take the user to the Single Sign-On page. Enter SUMA user Credentials.
3. Click “Log In”



4. 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.

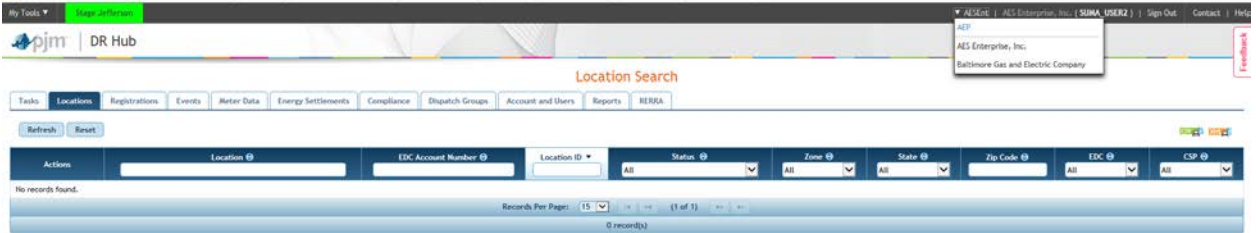


5. Application should be launched. Top right hand corner of the page will display the company Short and Long name. If the user has access to more than one company for the application launched user will be able to switch by using the company dropdown menu.

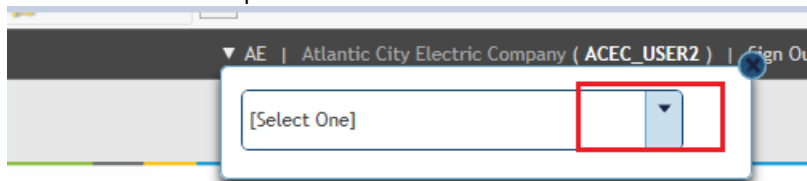


6. To switch to another company for the same application, highlight and click over the company name. User access for the application will be according to the company they are logged in and its access.

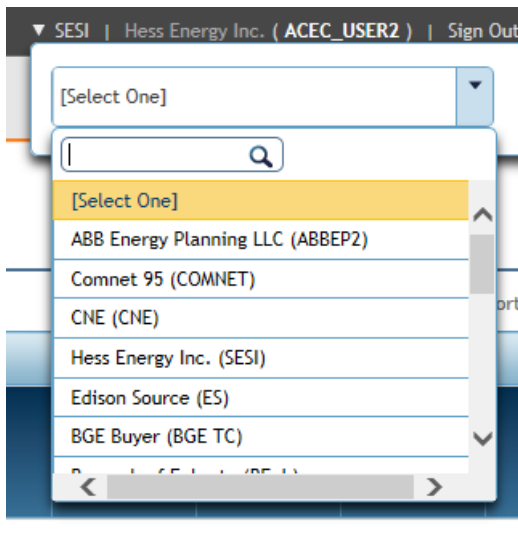
a. Below screenshot displays the dropdown menu for 10 or less company accounts.



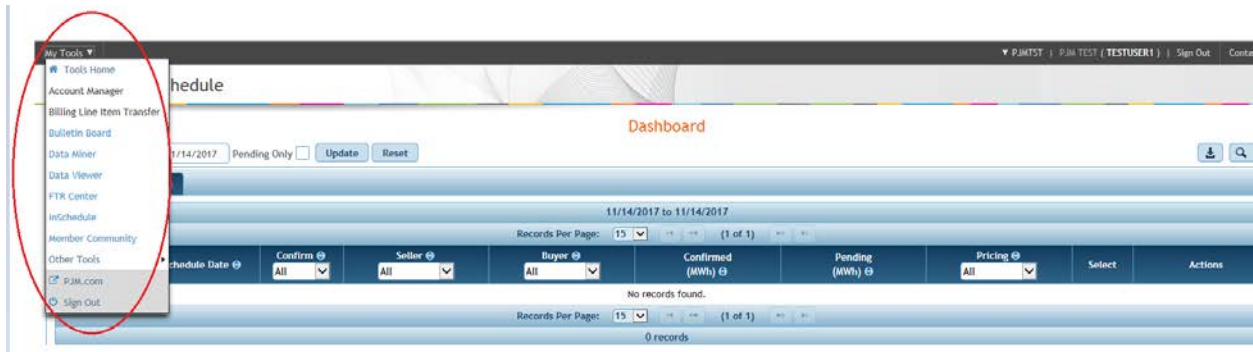
- b. Drop down menu for 10 or more company accounts. User may type in the company account name or shortname select from the dropdown menu inside the box.



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



7. User may click on "My Tools" dropdown menu on left-hand side from any application to switch to another application.
 - a. The tools on the primary accounts are displayed in blue
 - b. The tools on the secondary accounts are displayed in black.
 - c. The tools that are on both primary and secondary accounts are displayed under Tools Home in blue. Public tools (Bulletin Board, Data Miner, Gas Pipe, Messages) are displayed under Other Tools - in blue if the user has access to it. Black if it is a default access.



Section 4: Accessing PJM Tools' through Command Line Interface (CLI) as a Single User Multi Account user

PJM allows users to transfer XML formatted files to and from the system through a browserless Java-based application called the PJM Command Line Interface (CLI). File transfers must be formatted according to the requirements in the PJM Command Line Interface (CLI) document.

System Requirements change for SUMA

- Must use CLI version 1.3.0 or higher
<http://www.pjm.com/-/media/etools/exschedule/pjm-command-line-interface-java-7.ashx?la=en>

Setenv file change

REM (Optional) if you are a SUMA user and have multiple accounts set the specific

set ACCOUNT=-h Suma-Account=BC

REM e.g. set ACCOUNT=-h Suma-Account=BC

- Providing the correct Account information in the setenv file (set ACCOUNT=-h Suma-Account=<company shortname>) will allow the user to upload/download information for the account
- Account information left blank in the setenv file (set ACCOUNT=-h Suma-Account=<company shortname>) will allow the user to upload/download information for the primary account. If the primary does not have access it will upload/download from any of the secondary accounts.
- Account information REMed in the setenv file (REM set ACCOUNT=-h Suma-Account=<company shortname>) will allow the user to upload/download information for the Primary account. If the Primary does not have access it will upload/download from any of the Secondary accounts.
- Account Information removed from the setenv file will allow the user to upload/download information for the primary account. If the primary does not have access it will upload/download from any of the secondary accounts.
- Incorrect Account information in the setenv file will throw an error for the upload/download.
- Correct Account information in the setenv file but that particular company does not have access to the application for upload/download will throw an error.