

Single User Multi-Account (SUMA) Quick Guide



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Single User Multi-Account (SUMA)

Overview

A Single User Multi-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.

Note to CAMs: Member CAMs who are CAMs to multiple accounts and want to link them under a single user account should contact their authorized individual (authorized representative, maintenance manager or officer) from their company to submit this request via the [Membership Management Community](#) under [Maintenance](#) on your behalf.

RULES

- The primary account is the only account that will have the default tools access. Default tools are: Data Miner 2 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 company account.
- Only SUMA enabled tools can be requested for the secondary accounts.

BENEFITS OF USING SINGLE USER MULTI-ACCOUNT (SUMA)

- Company accounts are accessible via one account password.
- User experience – users can move between company accounts securely without having to log in each time.

How to Create a New Single User Multi-Account

Account Manager can be accessed from PJM's [Account Manager Page](#): [pjm.com](#) > Home > Markets & Operations > PJM Tools > Account Manager.

1. Click **Register** for the appropriate environment in which you require a SUMA user account.

Account Manager

Account Manager is a tool used to create accounts and request and grant access to PJM's tools and website.

Production: [Sign In](#) [Register](#)
Train Environment: [Sign In](#) [Register](#)

2. Enter your company email address and click **Next**.

The screenshot shows the PJM Account Manager interface. At the top, the PJM logo and 'Account Manager' are displayed. Below this is a progress bar with seven steps: 1. Email, 2. Contact Information, 3. Main Account, 4. Subaccounts, 5. Main Account Access, 6. Subaccount Access, and 7. Review. Step 1 is currently active. Below the progress bar, there is a heading 'Email Verification' and a text input field labeled 'Enter your company email address *'. The input field is highlighted with a dashed orange border. Above the input field, there is a note: 'To register for a PJM account, complete the following information. If you already have an account, sign in. Register for a system account.'

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3. Fill in:

- A. Sign In Information
- B. Contact Information
- C. Security Questions

The registration form is divided into seven steps: 1. Email, 2. Contact Information, 3. Main Account, 4. Subaccounts, 5. Main Account Access, 6. Subaccount Access, and 7. Review. Step 2 is currently active. A warning message states: "Warning: This warning will not prevent you from creating a new user account; however, if you have an existing user account, please log in to your current account." The form fields are as follows:

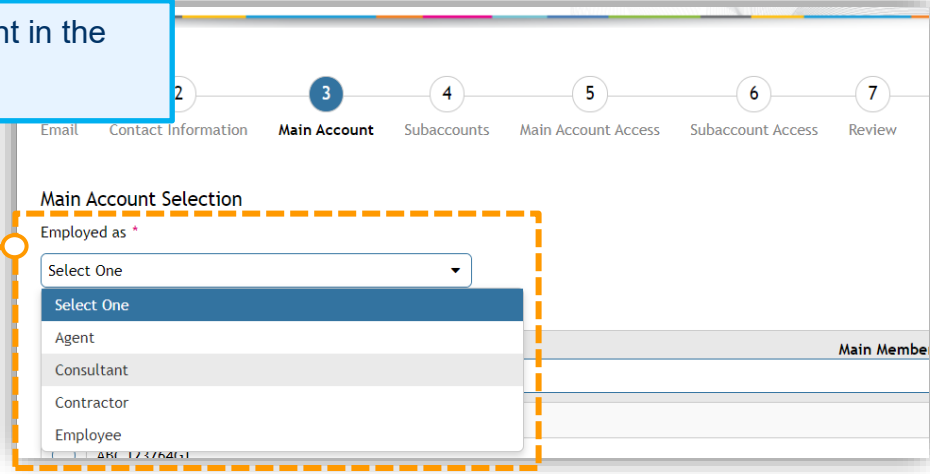
Section	Field	Value
A. Sign In Information	Username *	CHolliday15
	Email *	carter.holliday@pjm.com
B. Contact Information	First Name *	Carter
	Last Name *	Holliday
	Job Title *	PJM Tester
	Phone *	-610-555-1212
C. Security Questions	Q1 *	Who is your favorite basketball team? [Redacted]
	Q2 *	What is/was the make and model of your first car? [Redacted]
	Q3 *	What is the name of your current pet? [Redacted]

Buttons: Back, Next

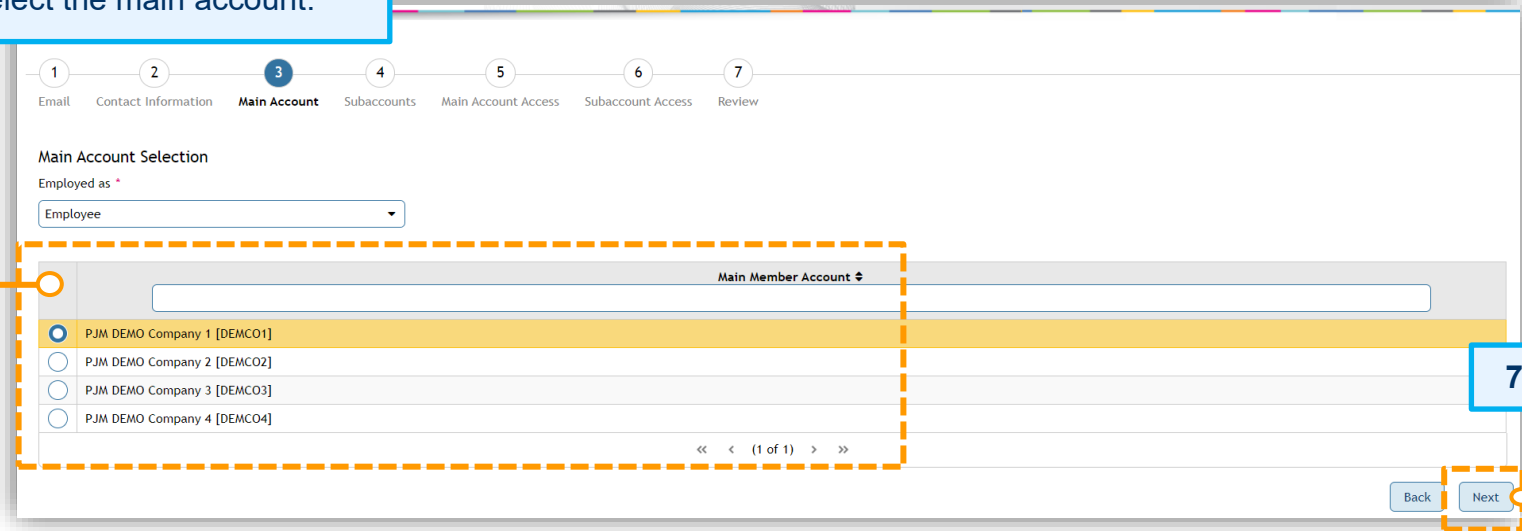
4. Click Next.

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5. Select your relationship to the main account in the **Employed as** field.



6. Select the main account.



7. Click **Next**.

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8. On the *Subaccount(s) Selection* screen, you can select one, multiple or all subaccounts, and then click **Next**.

Subaccount(s) Selection

Select the subaccounts you would like associated with your main member account below.

Subaccounts

PJM DEMO Company 1 (SUB 1) [DMCOS1]

Back Next

Subaccount(s) must be allowlisted to appear on the *Subaccount(s) Selection* list.

1 2 3 4 5 6 7
Email Contact Information Main Account Subaccounts Main Account Access Subaccount Access Review

Request Access for Main Company Account
Select the tools below for which you will need access to.

Access

Selected Access

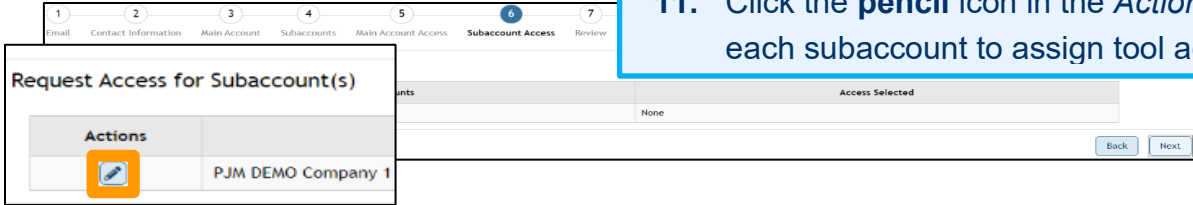
Member Community Public

9. Assign tool access for the main account by selecting the tool name under *Access*, then click the center **single-arrow** icon to add it to the *Selected Access*. Click **Next** to continue.

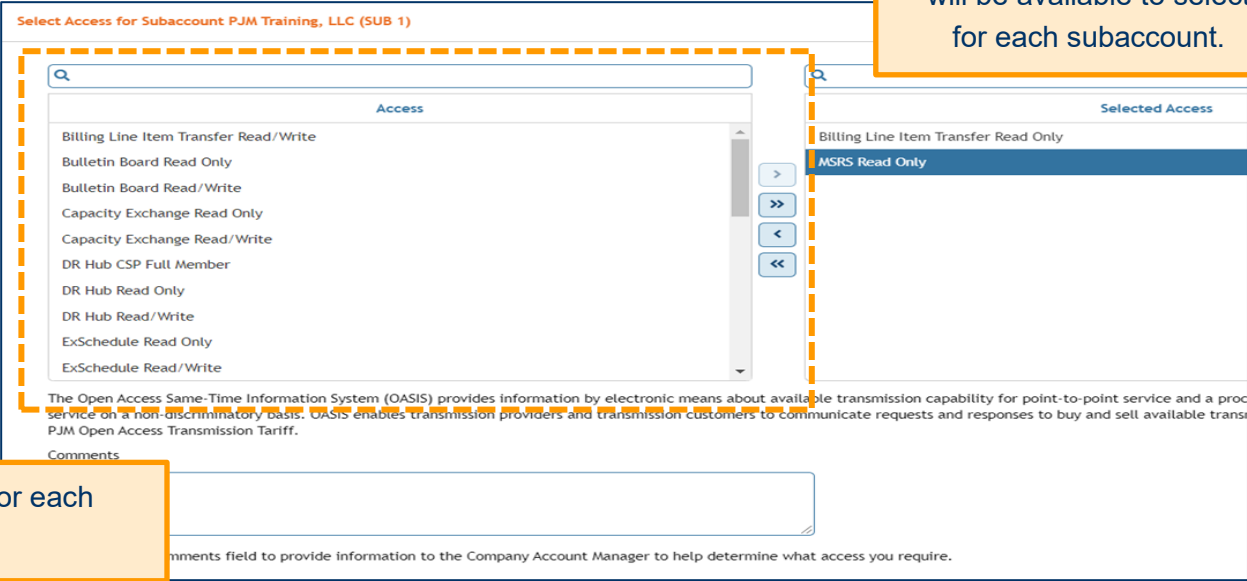
Back Next

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11. Click the **pencil** icon in the *Actions* column for each subaccount to assign tool access.



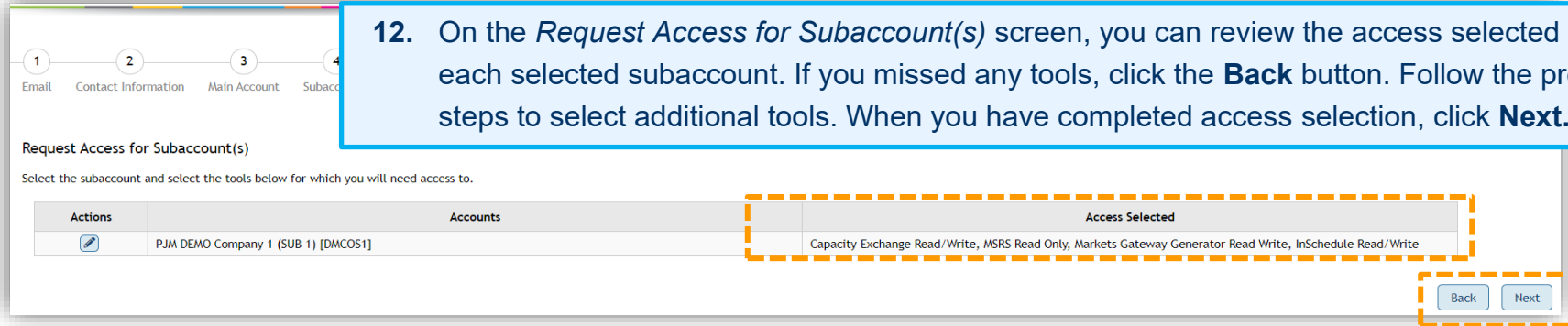
10. Assign tool access for the subaccount by selecting the tool name under *Access*, then click the center **single-arrow** icon to add it to the *Selected Access*. Click **Submit** to continue.



Only SUMA enabled tools will be available to select for each subaccount.

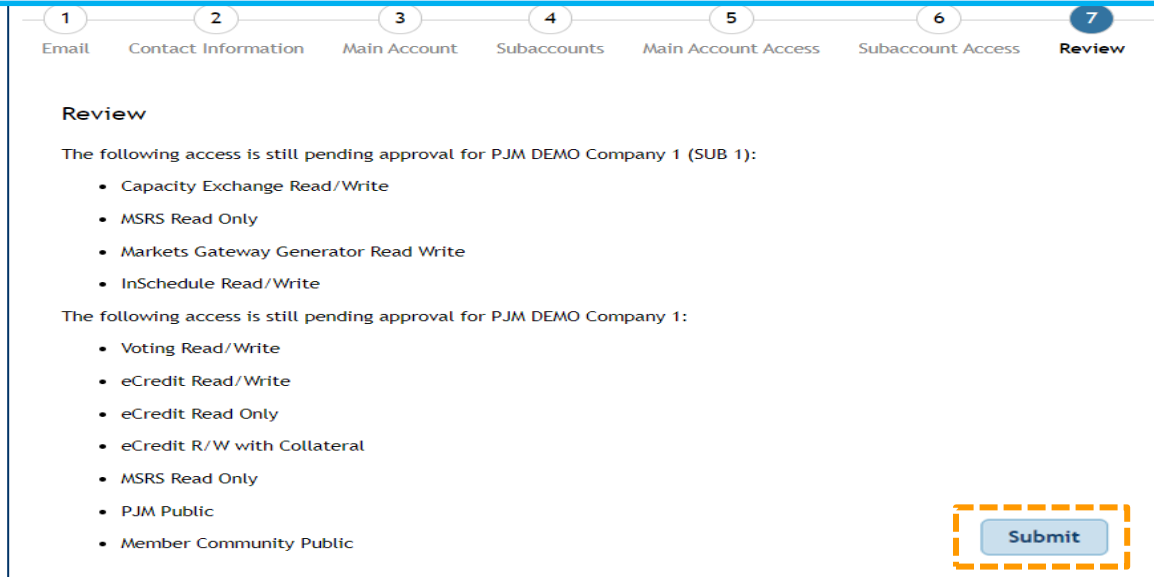
Repeat **Steps 10** and **11** to add access for each additional subaccount.

12. On the *Request Access for Subaccount(s)* screen, you can review the access selected for each selected subaccount. If you missed any tools, click the **Back** button. Follow the previous steps to select additional tools. When you have completed access selection, click **Next**.

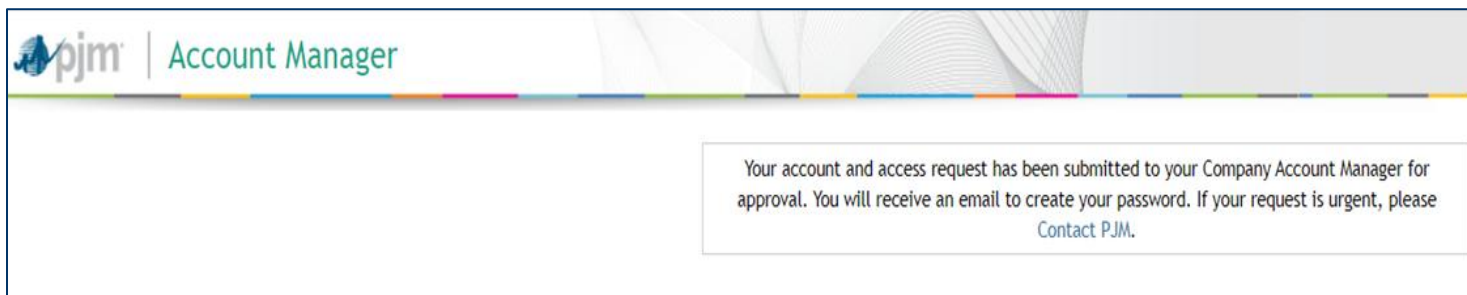


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13. On the *Review* screen, review all company account assignments and accesses being granted to the new SUMA user account, and then click **Submit** to finalize this request.



Next, you will receive the following screen, and an automated email with a link to set up your password. **Please note that this link expires four hours after issuance.** If the link expires, your company CAM administrator will need to issue you a password reset.



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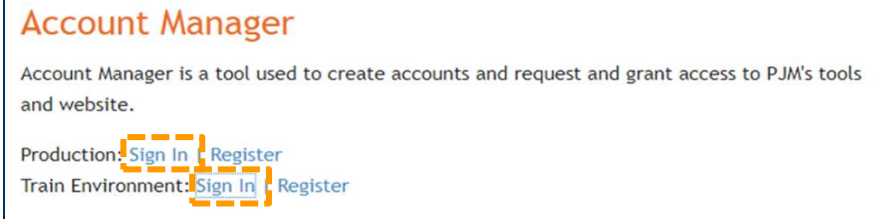
Convert an Existing User Account to a SUMA User Account

An existing user who has more than one user account may merge all of those user accounts and SUMA enabled tool access into a 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 account, and additional user accounts will become their secondary accounts. Only the primary account will be given the default tools access.

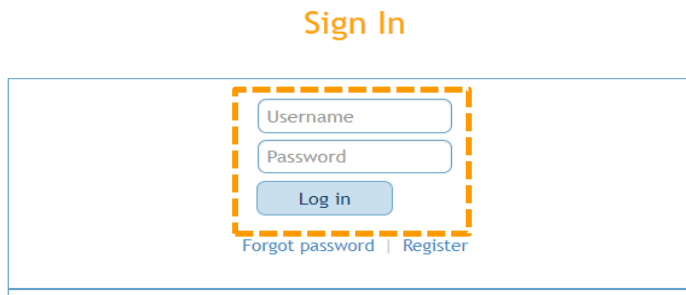
If you have an existing SUMA CAM user account, you don't need to make any changes. However, you will now be able to add SUMA enabled tools to the secondary accounts.

Note to CAMs: Member CAMs who are CAMs to multiple accounts and want to link them under a single user account should contact their authorized individual (authorized representative, maintenance manager or officer) from their company to submit this request via the [Membership Management Community](#) under [Maintenance](#) on your behalf.

1. Click **Sign In** for the appropriate environment in which your user accounts need to be converted to a SUMA user account.

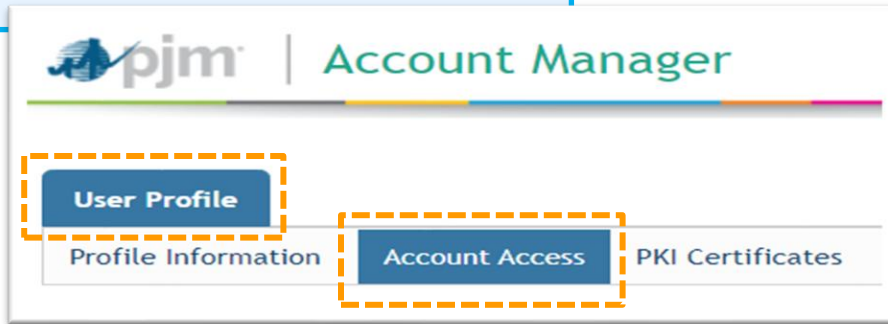


2. Sign in with your main (primary) company account credentials, then click **Log in**.

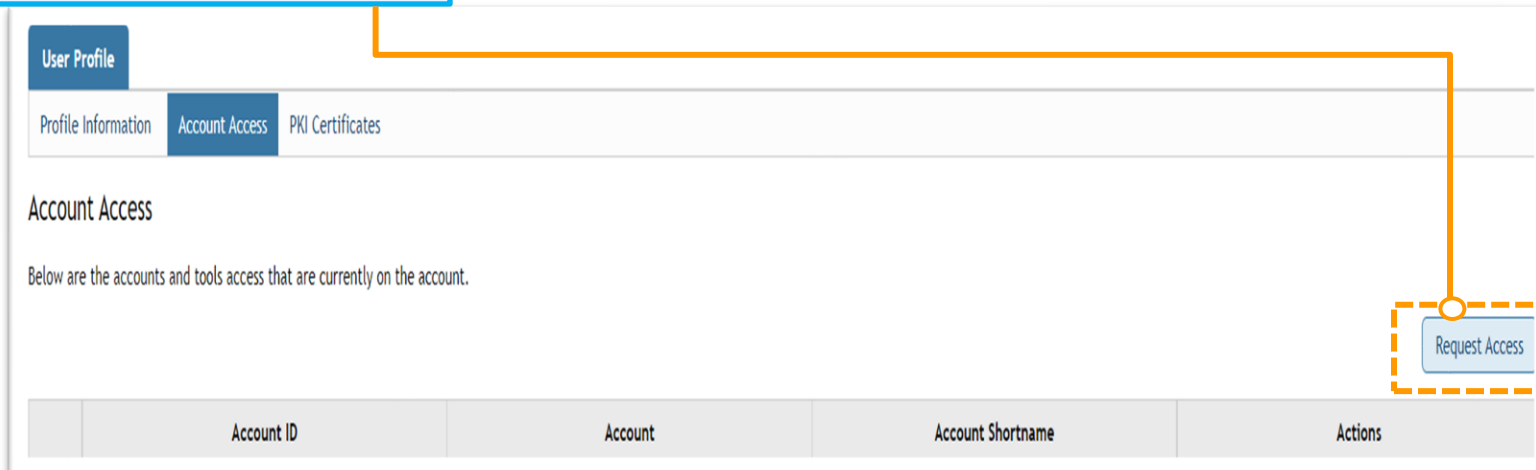


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3. Click **User Profile** then **Account Access**.

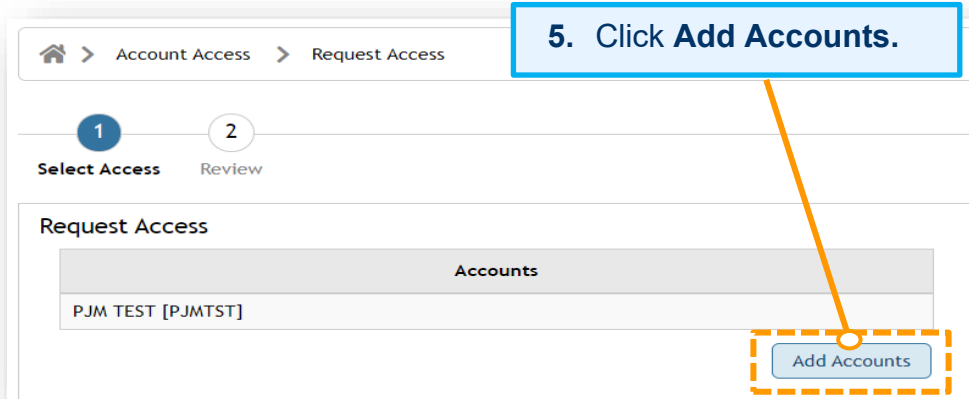


4. Click **Request Access**.

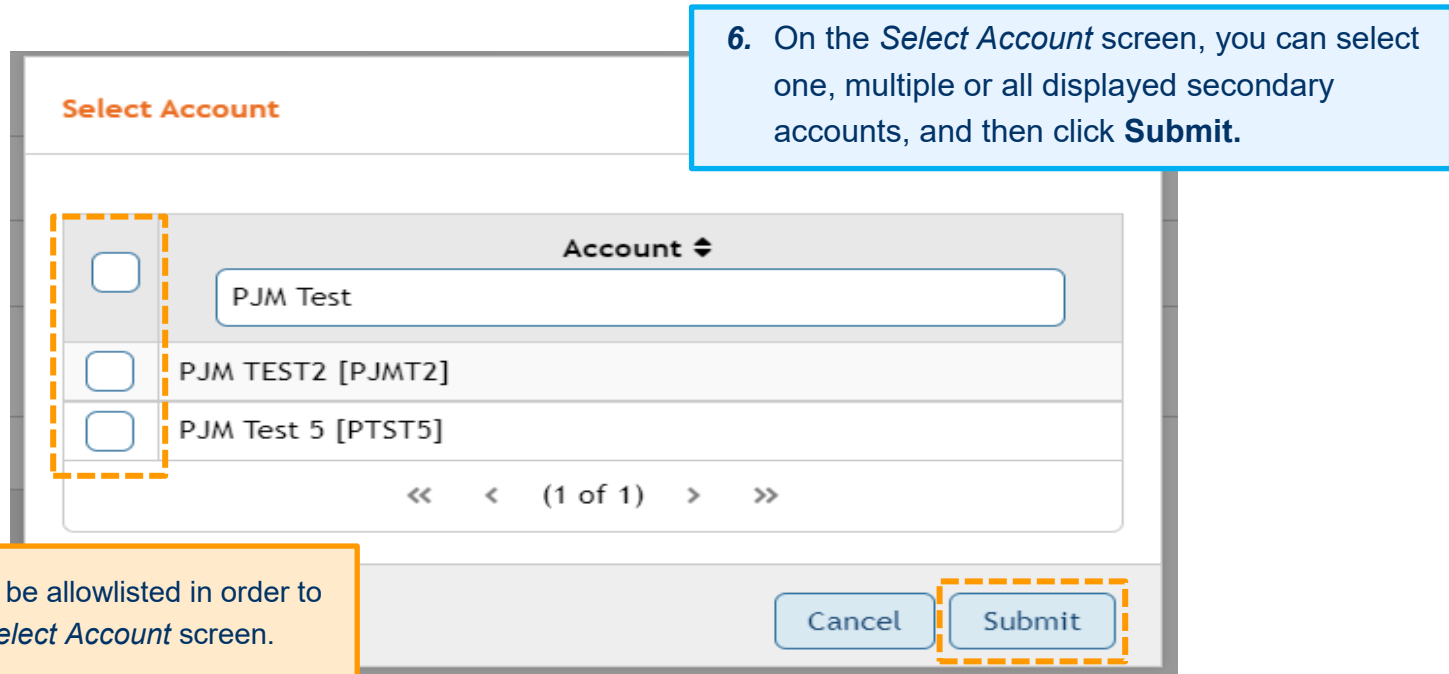


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Request Access Screen



5. Click **Add Accounts**.

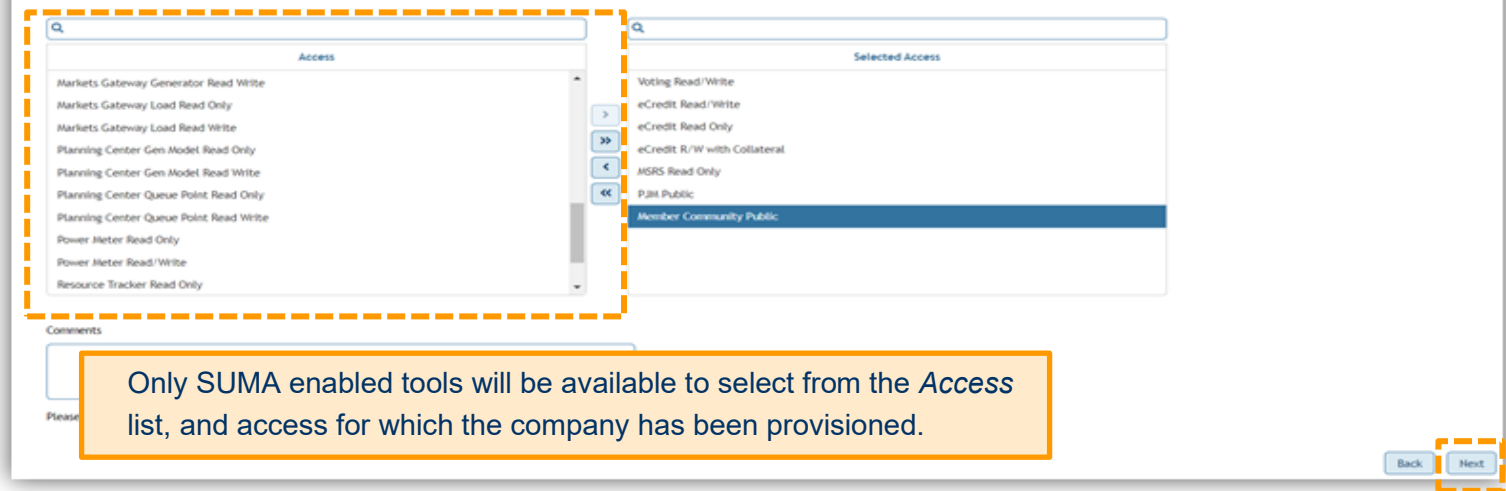


6. On the *Select Account* screen, you can select one, multiple or all displayed secondary accounts, and then click **Submit**.

Account(s) must be allowlisted in order to appear on the *Select Account* screen.

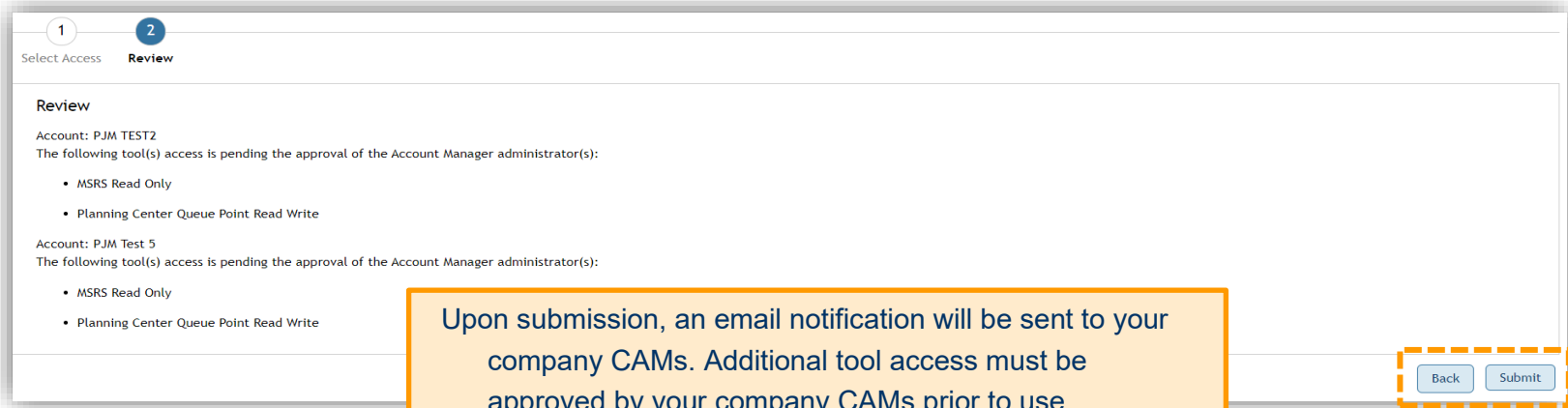
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7. Select tool access for the accounts by clicking the tool name under *Access* then clicking the center **single-arrow** icon to add *Selected Access*. Click **Next** to proceed.



Only SUMA enabled tools will be available to select from the *Access* list, and access for which the company has been provisioned.

On the *Review* screen, review all company accounts and accesses being granted for this new SUMA user account. If additional access is required, click the **Back** button, and then follow the previous step to select additional tool access. Click **Submit** to finalize this request.



Upon submission, an email notification will be sent to your company CAMs. Additional tool access must be approved by your company CAMs prior to use.

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Accessing PJM Tools as a SUMA User

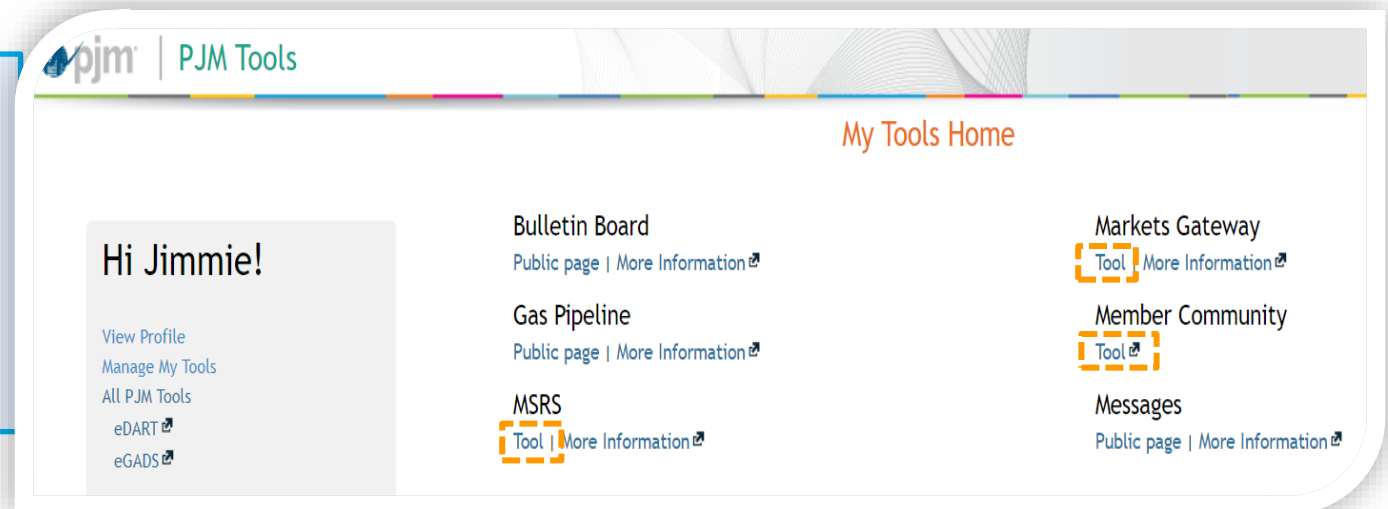
Users may access all their company accounts and tools associated with their SUMA user account from a single login. To access all the tools as a SUMA user follow the below steps:

1. Open web browser and navigate to the Tools home page – <https://tools.pjm.com/>

2. Enter SUMA user account credentials on the Single Sign-On page. Click **Log in**.

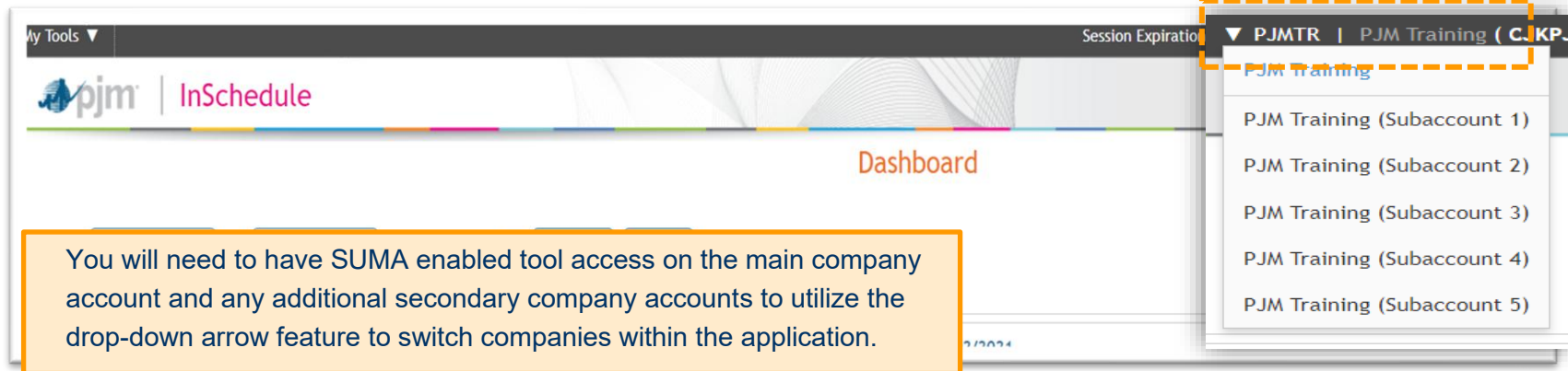


3. The PJM **My Tools Home** page displays combined accesses for the user's primary and all secondary accounts. Select a **Tool** link to launch an application.



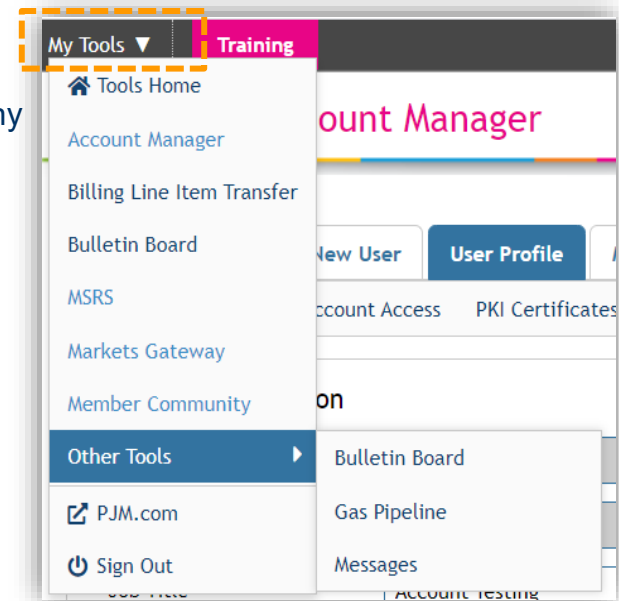
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Once the selected application has launched, in the upper right-hand corner of the page, you will see the default main company account shortname and longname. To switch company accounts, click the drop-down menu arrow before the account shortname, then select a secondary company from the drop down list.



You can also click the **My Tools** drop-down menu on the left-hand side of any application to switch to another application.

- The tools on the primary accounts are displayed in blue.
- The tools on the secondary accounts are displayed 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, Gas Pipe, Messages) are displayed under *Other Tools* – in blue if the user has access to it, black if it is a default access.



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Non-SUMA Enabled Tools

Not all tools within Account Manager are SUMA enabled. For the tools listed below, they can only be provisioned to the primary account of the user. A separate user account will be needed for each company tool access is needed for.

To determine the primary company account of the user, you can look at the “**Employer Field**” located under the user’s “**Profile Information**” tab or locate the company that’s highlighted in blue in the “**Request Access**” tab of the user profile.

List of Non-SUMA enabled tools:

DIMA

Data Miner 2

ELCC Calculator

Emergency Procedures

System Map

TO Connection

Voting

eCredit

eDART

Accessing PJM Tools Through Command Line Interface (CLI) as a SUMA 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 – <https://pjm.com/-/media/etools/pjm-command-line-interface-java-8.ashx>

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=) will allow the user to upload/download information for the account.
- Account information left blank in the setenv file (set ACCOUNT=-h Suma-Account=) 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=) 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.

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- 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.