Single User Multi-Account (SUMA) for PJM Tools

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SUMA Overview

- 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
SUMA Applicable Tools

- Account Manager
- Billing Line Item Transfer
- Bulletin Board
- DR Hub
- ExSchedule
- FTR Center
- InSchedule
- Markets Gateway
- OASIS
- Planning Center-Gen Model
- Planning Center-Queue Point
- Power Meter
- Resource Tracker
Converting to SUMA user account

- 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
Converting to SUMA user account

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

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

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

- 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.
Accessing Account Manager as a SUMA User

- 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 screenshot](image.png)

<table>
<thead>
<tr>
<th>Account ID</th>
<th>Account Name</th>
<th>Access Type</th>
<th>Effective Date</th>
<th>Terminate Date</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>3</td>
<td>PECO Energy Company</td>
<td>Read Only</td>
<td>01/30/2018</td>
<td>12/31/9999</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Atlantic City Electric Company</td>
<td>Read Only</td>
<td>01/30/2018</td>
<td>12/31/9999</td>
<td></td>
</tr>
<tr>
<td>5244</td>
<td>ABB Inc.</td>
<td>Read Only</td>
<td>01/30/2018</td>
<td>12/31/9999</td>
<td></td>
</tr>
</tbody>
</table>

www.pjm.com
My Tools

- 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.
Accessing PJM Tools as a SUMA user

• 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.
Accessing PJM Tools as a SUMA user

- 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 account
• If using the CLI there is an 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 shortname>
  REM e.g. set ACCOUNT=-h Suma-Account=PE