

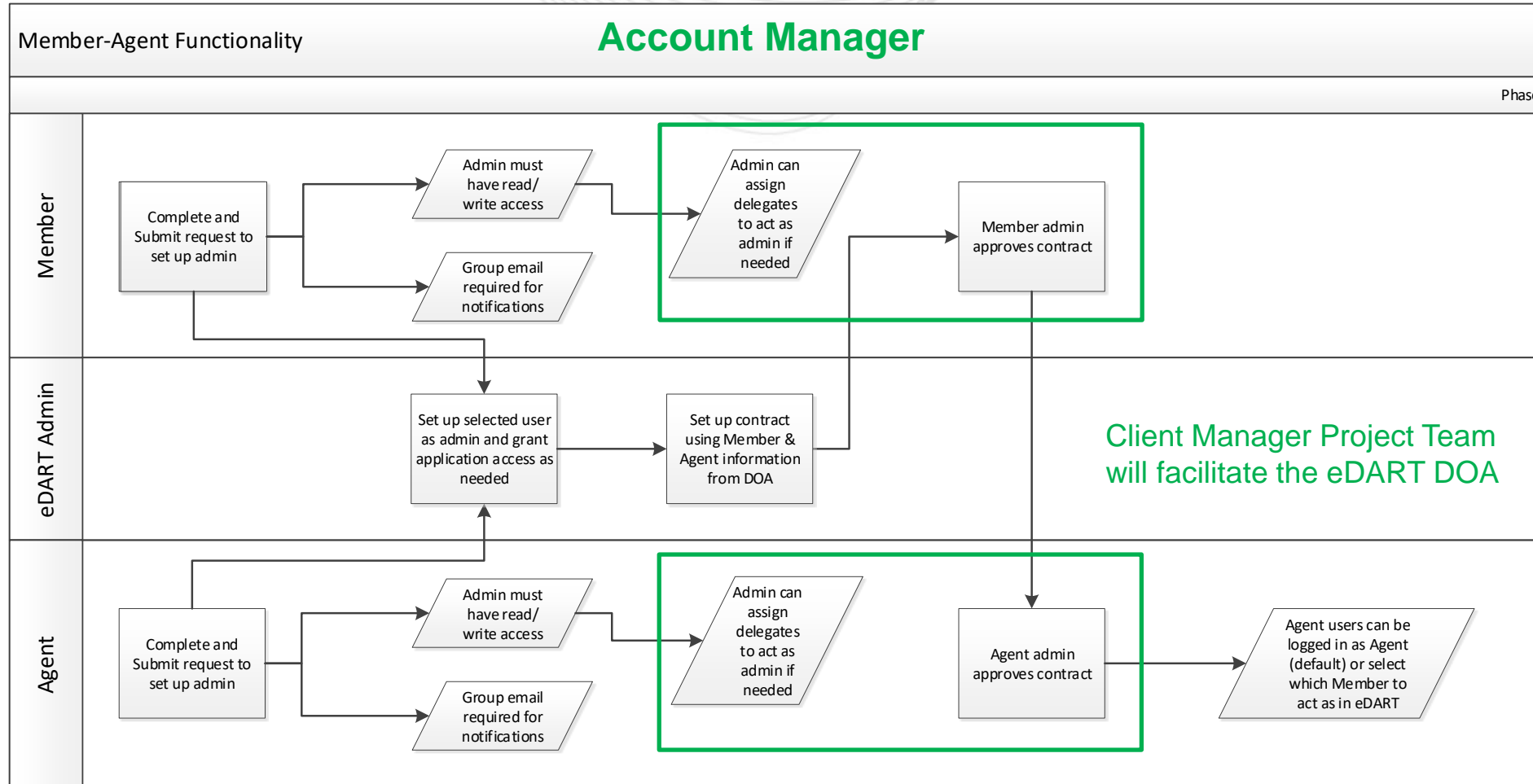


eDART Company Distributed Workflow - Member/Agent Functionality

Updated: 4/5/2023

Member requested functionality for one company (Agent) to perform eDART functions on behalf of another company (Member).

- Member is the client of the Agent
- Agent users will need only one eDART account under Agent.
- Agent users will be able to perform transmission and generation functions in eDART.
- Agent users will be able to switch Members within a single session of eDART. (No need to logout, and login.)
- Available for eDART browserless interaction with migration of eDART accounts to Account Manager.



Updated Declaration of Authority (DOA) to include eDART tasks.

- Contact Client Managers Project Team and indicate that the update is to grant Agent authority to perform eDART tasks for Member.
- Not needed if the Member and Agent already have a Full Responsibility Transfer DOA.
- Not needed if the Member and Agent are account/sub-account (e.g. Twin Eagle companies) or in the same group of companies (e.g. ATSI, GPU and APS)
- Not needed for Read-Only Agents

PJM Member and Agent required to complete provided enrollment form.

- One enrollment form per Member/Agent pair.
- Officers of Member and Agent companies required to sign (DocuSign).
- Provide email addresses for notifications of changes to the Member/Agent assignments.
 - If no email address is provided, no Company Admins can be set up to handle agreements.
 - Group email address is highly recommended.
- Member and Agent required to select a CDW Admin.
 - CDW Admin can authorize additional R/W users to manage Member/Agent assignments. (i.e. CDW delegates.)

Member and Agent required to each provide email addresses for notifications of changes to the Member/Agent assignments.

- Verification of the provided email address is required.
- If no email address is provided, no Company Admins can be set up to handle assignments.
- Group email address is highly recommended.
- Request form will be provided.

Changes to list of Company Admins and Client/Agent assignments will be emailed to the provided company email addresses.

CDW Admin/Delegate is responsible for approving the CDW Agreement in Account Manager.

- CDW Admin/Delegate for the CDW Member can cancel the agreement after it is active, if needed.
 - Declaration of Authority must be updated as needed.
- Account Manager username with eDART access is required.
- CDW Delegate promoted to CDW Admin if admin loses access.
 - Notification sent.

Member View

User Profile **eDART CDW**

Agreements User Maintenance

Agreements

| Agent | Type | Status | Effective Date | Terminate Date | Actions |
|----------------------|----------------------|--|----------------|----------------|--|
| <input type="text"/> | Show All | Active X Initiated X Member Approved X Agent Approved X Approved X | | | |
| PJM TEST | Generation Read Only | Initiated | 07/20/2023 | 12/31/9999 | <input checked="" type="checkbox"/> <input type="checkbox"/> |
| XXTest | Generation Read Only | Initiated | 07/20/2023 | 12/31/9999 | <input checked="" type="checkbox"/> <input type="checkbox"/> |

Records Per Page: 15 << < 1-2 of 2 records > >>

Agent View

User Profile **eDART CDW**

Agreements User Maintenance

Agreements

| Member | Type | Status | Effective Date | Terminate Date | Actions |
|----------------------|----------------------|--|----------------|----------------|--|
| <input type="text"/> | Show All | Active X Initiated X Member Approved X Agent Approved X Approved X | | | |
| TEST New Company | Generation Read Only | Initiated | 07/20/2023 | 12/31/9999 | <input checked="" type="checkbox"/> <input type="checkbox"/> |

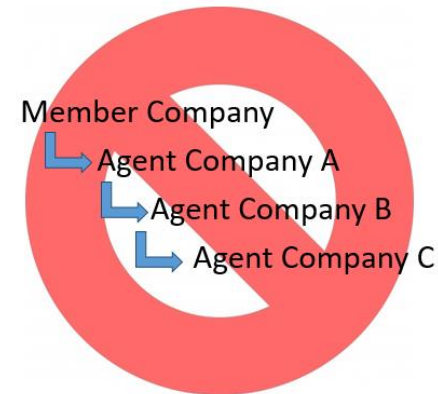
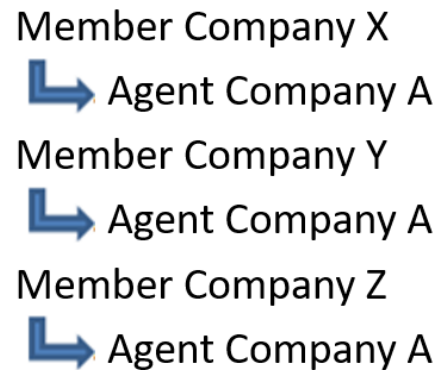
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Member can only have one Read/Write Agent for either generation or transmission functions in eDART.

Member can have multiple Read-Only Agents.

Agent can have multiple Members.

Agent cannot also act as a Member.



By default, users in Agent will be logged into eDART as Agent

- Agent users will be able to pick which Member to acts as in eDART.
- eDART page will be refreshed to show Member's unit/equipment and available eDART functions.

Use drop down to change which company agent user is logged into eDART for. User is logged in as Agent by default.

Comp :
AC ▼

- My eDART
- Upload
- Download
- Trans. Tickets
- Network Model
- Black Start
- TERM
- Reactive Reserve
- Instantaneous Reserve Check
- Minimum Gen. Report
- PJM Status Report

The interface features the eDART logo at the top, a cityscape illustration, and a central section titled "Agent Company". Below this title is a table with the heading "Members".

| Members | |
|------------|------------------|
| Short Name | Name |
| MC1 | Member Company 1 |
| MC2 | Member Company 2 |
| MC3 | Member Company 3 |

List of Members