eDART User Account Creation / Migration to Account Manager (AM)

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eDART Accounts Update for Refresh

With the ongoing eDART refresh, management of eDART accounts will be handled exclusively in Account Manager (AM):

- New user account creation
- Granting eDART access to existing user accounts
- Password resets
- Unlocking accounts
- Terminating eDART access

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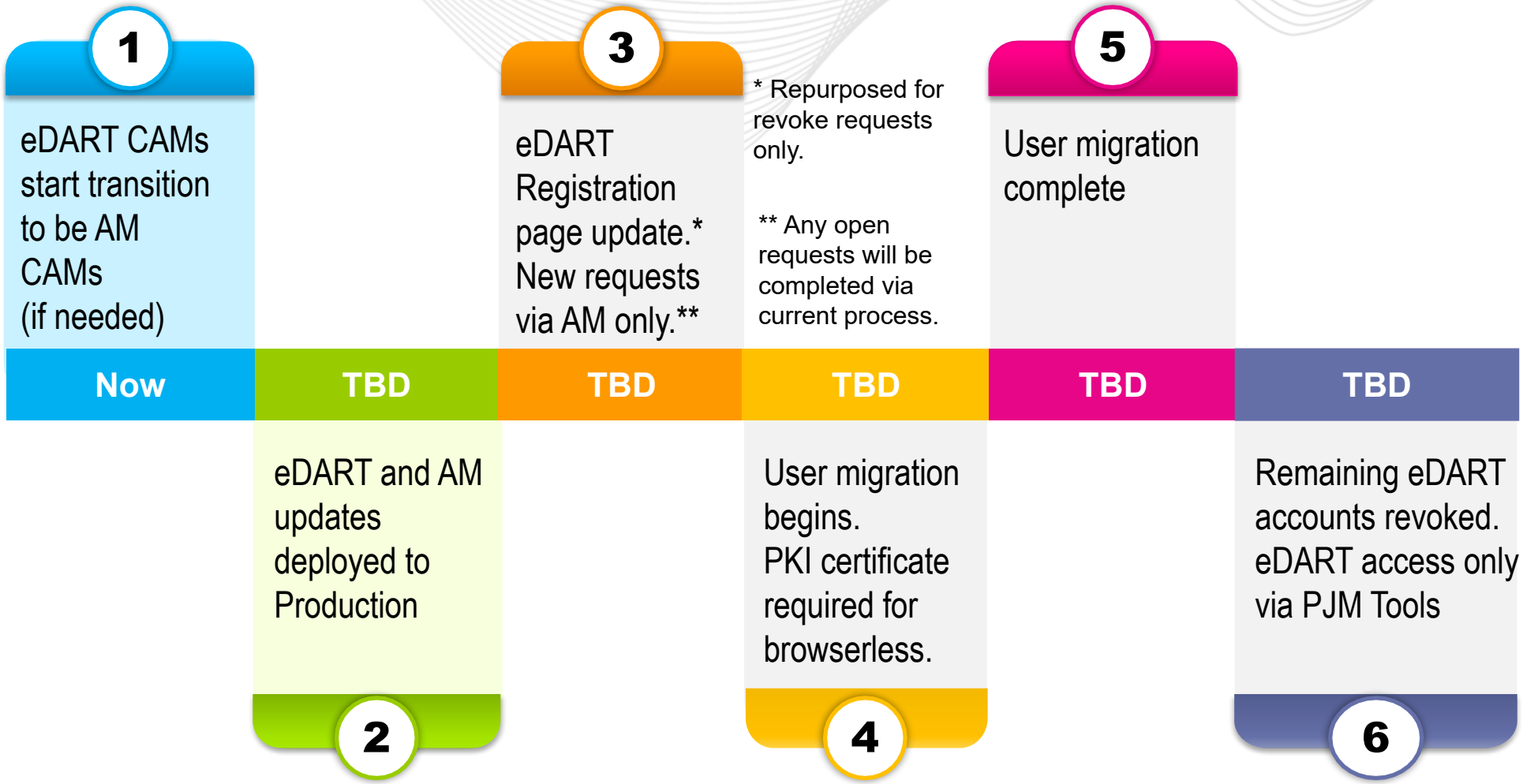
2023 Migration Timeline



Communication will be sent out for each milestone.

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eDART CAM Transition to Account Manager CAM

With the transition to Account Manager, eDART CAM role will no longer be available.

To transition to a Account Manager CAM role:

- An officer, authorized representative or maintenance manager must designate an individual as a CAM through the Maintenance feature in the Membership Management Community.
- Instructions are outlined on page 6 in the Member Maintenance User Guide.

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eDART CAM Transition to Account Manager CAM

eDART CAMs that will not become Account Manager CAMs should work with their Account Manager CAMs to transition their responsibilities.

- Plan for internal coordination if needed
- Share any special access usually requested. E.g. Hydro Calculator
- Review current user list with Account Manager CAM

At the end of the user migration period, current eDART CAM role will be retired and CAM information deactivated in eDART.

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Migration of Existing eDART Users

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CAM High Level Migration Checklist

✓	Step	Reference
	eDART CAM transition to Account Manager CAM	Slide 4
	eDART CAM transition responsibilities with Account Manager CAM if not opting to be Account Manager CAM	Slide 5
	Request current eDART user list from eDART team	eDARTAccountRequests@pjm.com
	Migrate current eDART users as applicable: • Create new AM user account • Request eDART access for existing AM user account • Contact eDART team for bulk option/working session • Address Special Conditions	Slides 8-25
	Request check-in with eDART team to confirm completion • Submit revoke request for accounts that will not be migrated	eDARTAccountRequests@pjm.com

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User Access Migration – eDART Roles

- Create new Account Manager user account or select existing user account that will be used for eDART.

Account Manager Role	Web Form Access Type
eDART Generation Read Only	Generation outage tickets: Read Only
eDART Generation Read Write	Generation outage tickets: Edit
eDART Transmission Read Only	Transmission outage tickets: Read Only
eDART Transmission Read Write	Transmission outage tickets: Edit
eDART Generic	Generic user: Read Only

- ‘Transmission outage tickets: Transmission Planning’ will be a customization of eDART Transmission Read Only

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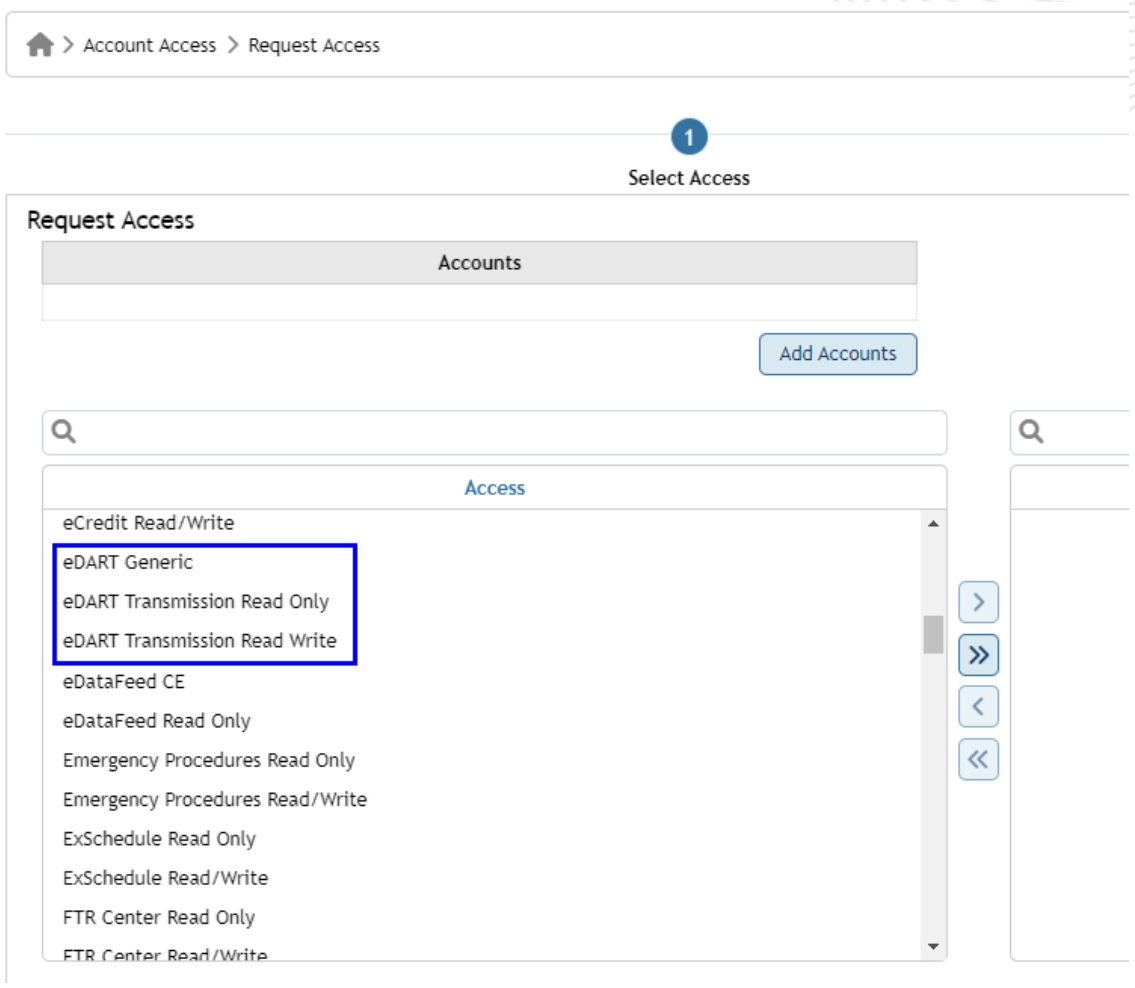
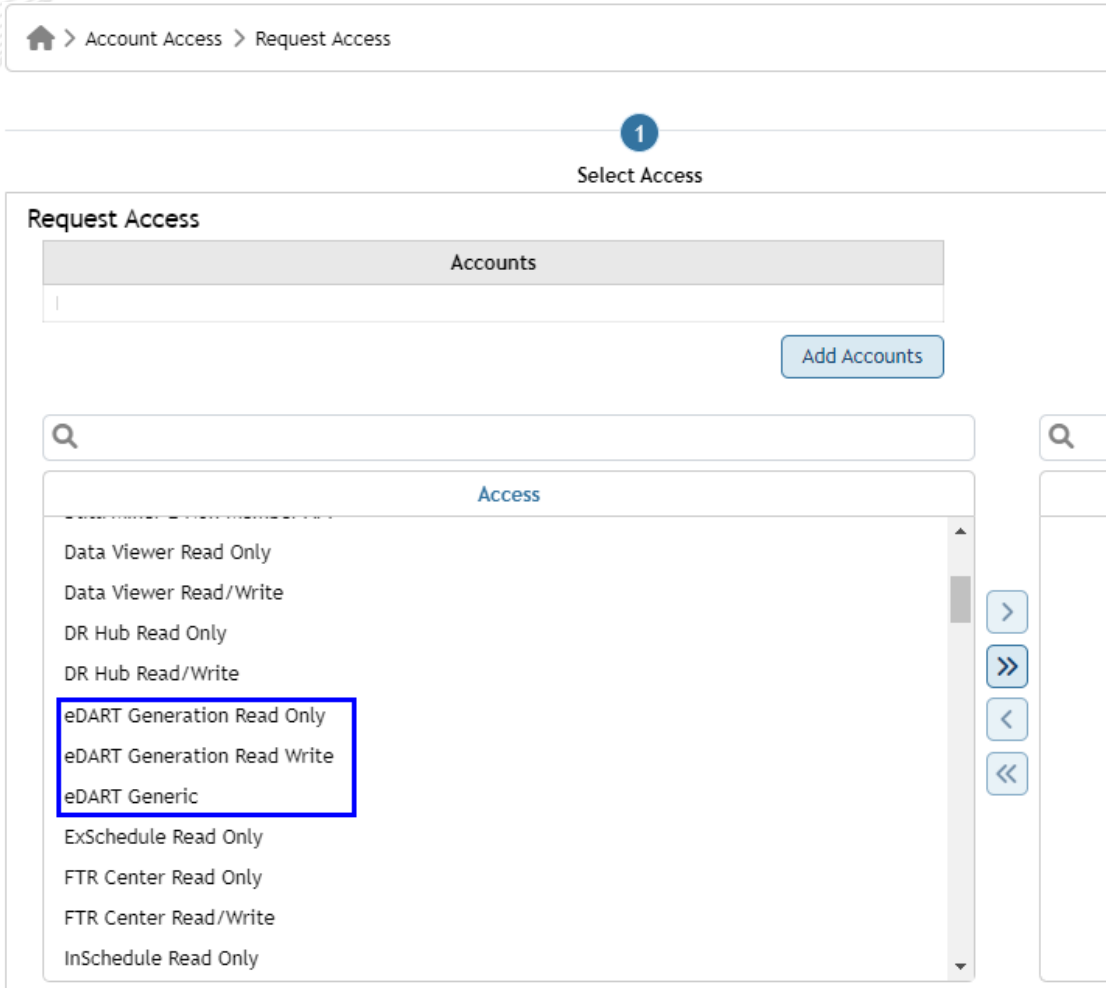
User Access Migration – eDART Roles

Transmission Company



Generation Company



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User Access Migration

- Account Manager CAM or user can request eDART access via Account Manager.
  - See ‘User Profile – Account Access’ section of the User Account Management Quick Guide here.
  - Bulk option: Account Manager CAMs can work with eDART and AM teams for bulk access requests.
    - Working/Review session will be required.
    - Expectation will be to complete the migration during the working session.

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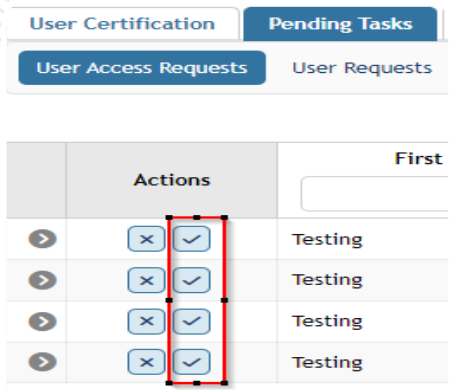
User Access Migration – Bulk Option

A	B
USERNAME	ACCESS
TestUser1001	eDART Transmission Read Only
TestUser1002	eDART Transmission Read Write
TestUser1006	eDART Generic
TestUser1007	eDART Transmission Read Write

User list review

- CAM review and approve user access list
- New accounts (not currently in eDART) can be included



Access requests submitted

- eDART and AM Teams submit bulk access requests
- CAM approves the requests
- CAM submits additional requests via eDART if needed

Done!

- Pending any additional requests
- eDART team complete provisioning if needed

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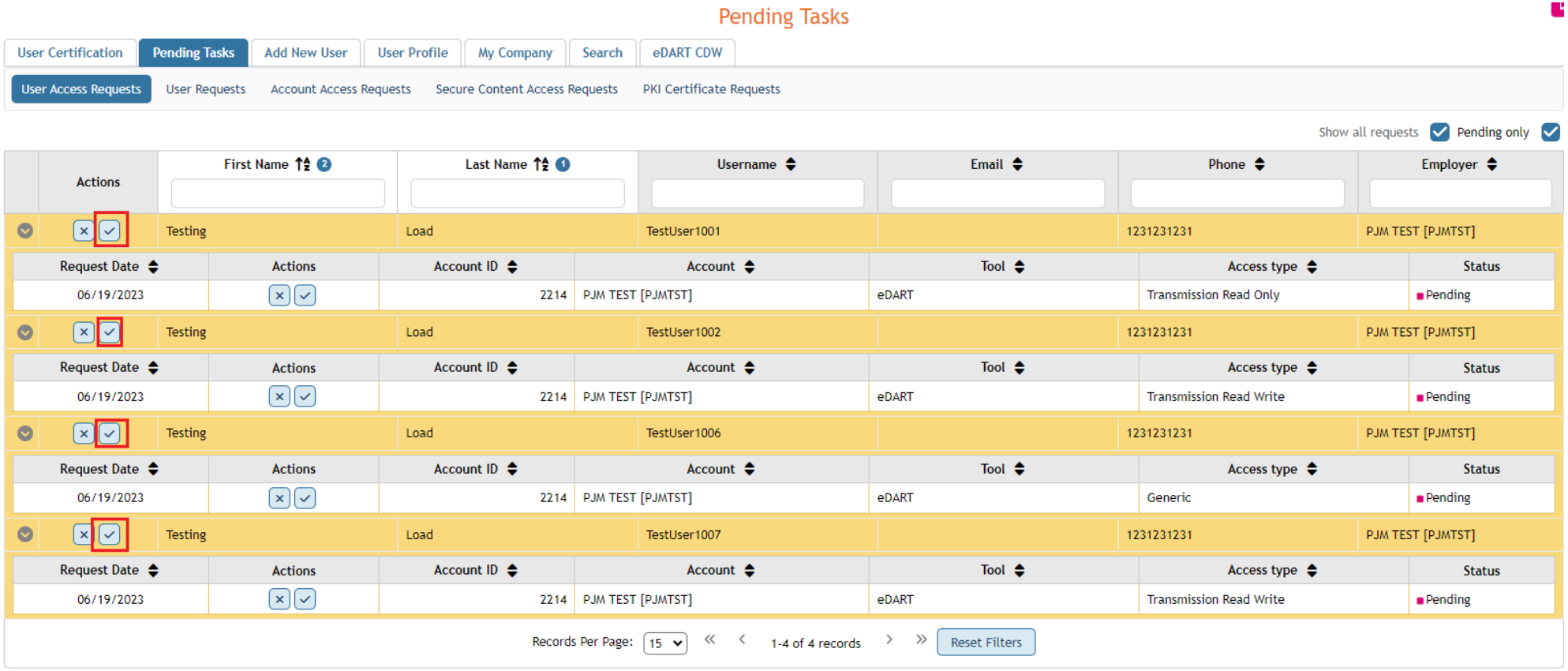
User Access Migration – Bulk Option

- Account Manager CAM approves the requests from Pending Task tab



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User Access Migration – Additional Requests

- User access can be further customized by the Account Manager CAM via comments submitted in eDART.
  - Account Manager CAM will need to have eDART access.
    - Generation or Transmission read/write access required.
    - Examples:
      - Hydro Calculator access
      - Nuclear Voltage Limits access
      - Reduction of access to select eDART applications
      - ‘Copy/Make access like’ requests
  - Request will be processed and provisioned by eDART admins.
  - User access will be limited until completed

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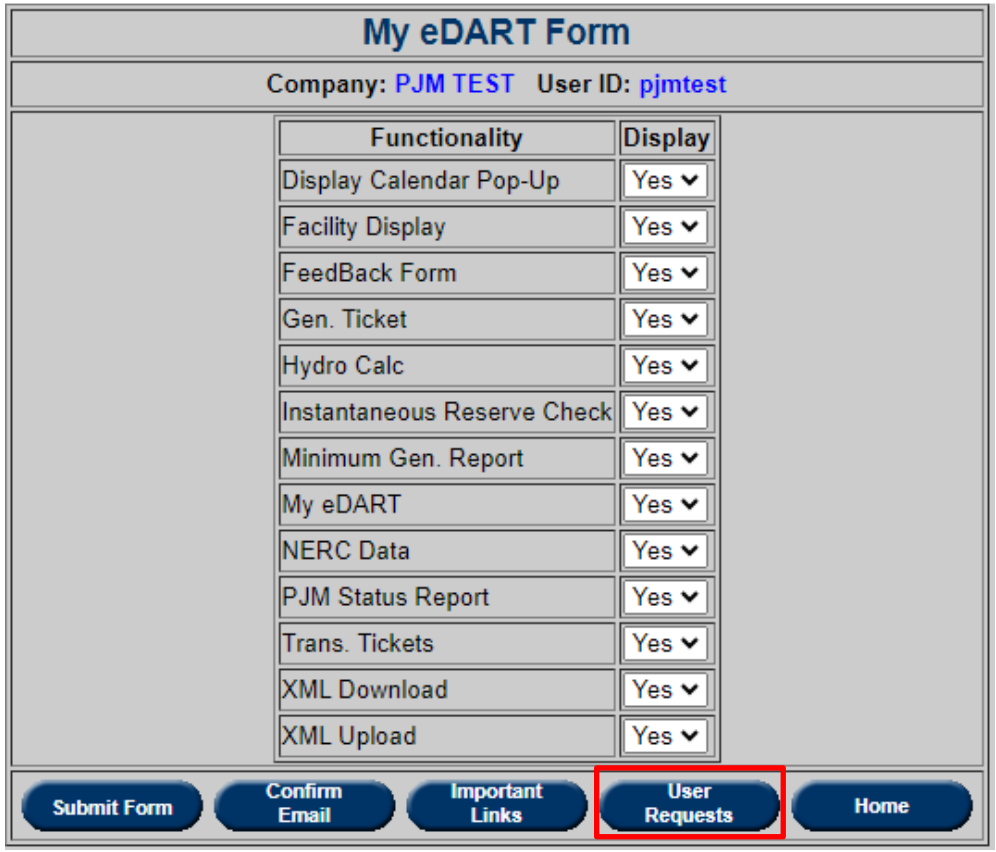
User Access Migration – Additional Requests

- To submit additional requests:
  - Log into eDART
  - Go to My eDART
  - Click on User Requests → Add New
  - Select User and enter Request
  - Submit Form



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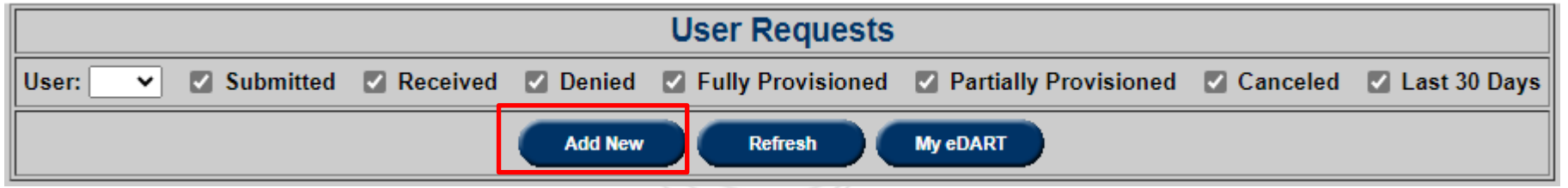
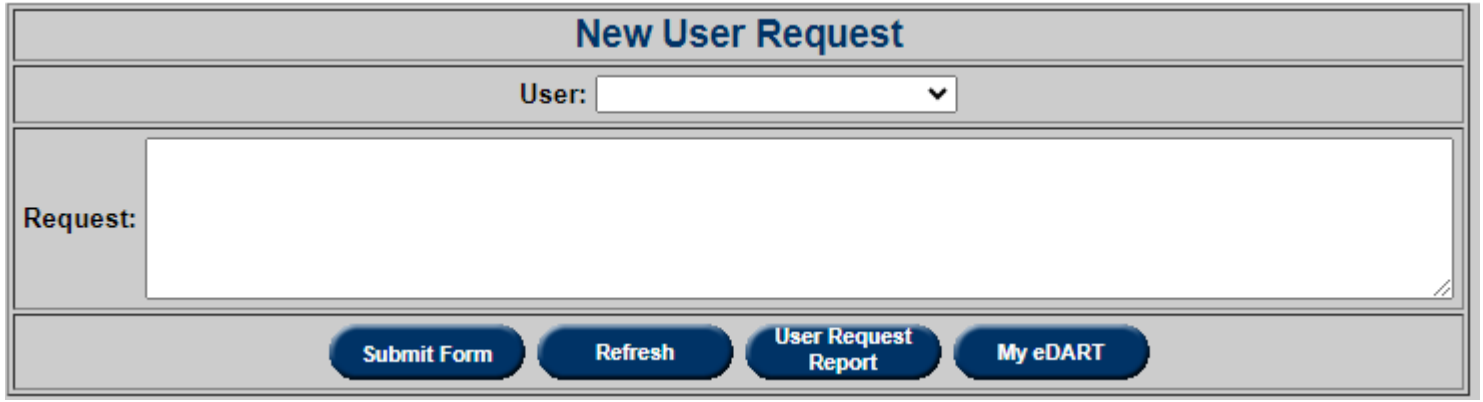
User Access Migration – Additional Requests





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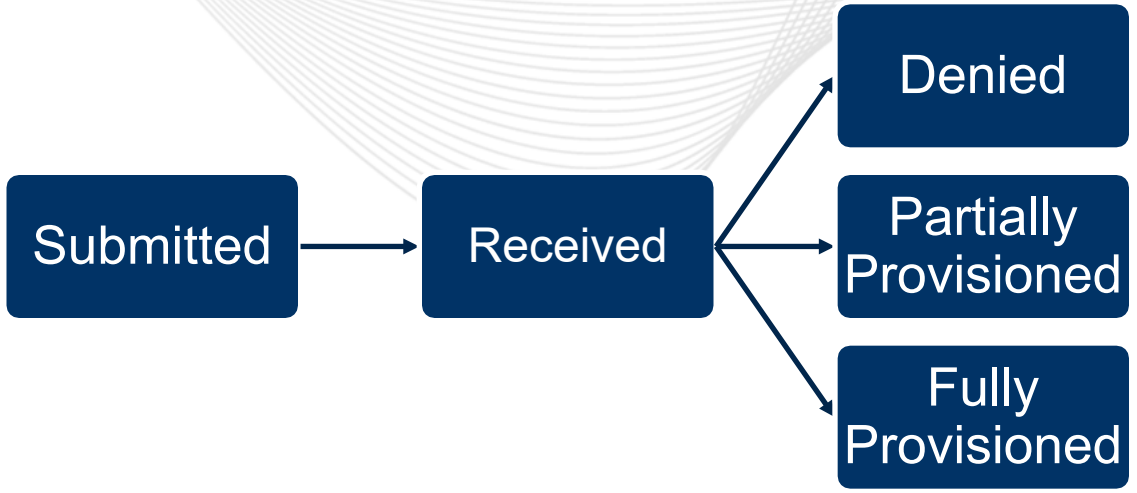
User Access Migration – Additional Requests



- Submitted: Request submitted for selected user account
- Received: eDART admins reviewing request
- Denied: Request cannot be provisioned (comments included)
- Partially Provisioned: User account updated different from request (comments included)
- Fully Provisioned: User account updated as requested
- Cancelled: Requested cancelled by Account Manager CAM

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After Migration

Migrated users:

- can only log into eDART via PJM Tools.
- can use Single Sign-On to log into eDART.
- will require PKI certificate for browserless interaction with eDART (if the user/system account does not already have one).
- should contact their Account Manager CAMs for password resets and unlocking accounts.

At the end of the user migration period, accounts that remain in eDART will be revoked.

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Special Considerations

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Special Considerations

- System accounts in Account Manager cannot be used to access the UI.
  - Users will need a separate individual account if UI access is desired
  - System accounts require PKI certificates to interface with Dart Browserless
  - See June 14th eDART XML Forum meeting slides for more information (here)

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Mis-matched User Names

- If a user's Account Manager username does not match the current eDART username, additional actions may be required. E.g.
  - Transfer of CEII approval for transmission users.
  - Transfer of customized access where applicable.
- These can be handled during bulk migration sessions.
- Account Manager CAM can also submit a user request to copy account set up from old eDART username to new Account Manager username with eDART access.
  - Provided old eDART user account is not revoked.

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eDART Generic Users

- ‘eDART Generic’ company is used currently for users in eDART who do not have eDART CAMs and request generic access.
  - If the user has a Account Manager CAM in Account Manager, eDART generic access should be requested under the appropriate user account.
  - Otherwise, the user must register their user account under the company ‘Other’.

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eDART Accounts in Train

- eDART Production and eDART Train access will need to be requested and managed separately in Account Manager.
- Existing eDART Train user accounts will need to be migrated in Account Manager Train if access is still needed.
  - Can be done with bulk option.

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Partial Migration

- Possible scenario where some users in a company are migrated and other users are not.
- May result in inability of some users to access eDART via in-house company tool if tool is/is not updated to use eDART SSO login.
  - Work with vendor/technical support to coordinate migration
  - Some users may need to log directly into eDART
- CAMs can contact eDART team as needed to track status of migration per company.
  - Submit revoke requests for users that will not be migrated

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Dormant & Duplicate Account Clean Up

- At the start of the account migration period, eDART accounts that have not been used since 2014 will be revoked.
- eDART user accounts are currently case sensitive and this will result in duplicates when the case sensitivity is removed (AM usernames are not case sensitive).
- These duplicates will be cleaned up:
  - '_old' will be added to the duplicate usernames that are revoked or not recently used
  - eDART CAMs will be notified

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SUMA

- eDART is a suite of tools and as such has a security configuration that is not compatible with SUMA.
- After extensive consideration and technical evaluation, eDART will not be SUMA enabled similar to other tools like Data Miner 2, Data Viewer, Emergency Procedures and TO Connection.
- Consider Company Distributed Workflow (CDW) for eDART
  - CDW information included in later slides.
  - Contact eDARTCDW@pjm.com to request CDW demo

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SUMA

- eDART access granted to SUMA accounts can only be used for the parent company account.
  - If not using CDW, individual AM user accounts will be needed for the sub-accounts.

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eDART Account Management Process – New User Requests (new user accounts)

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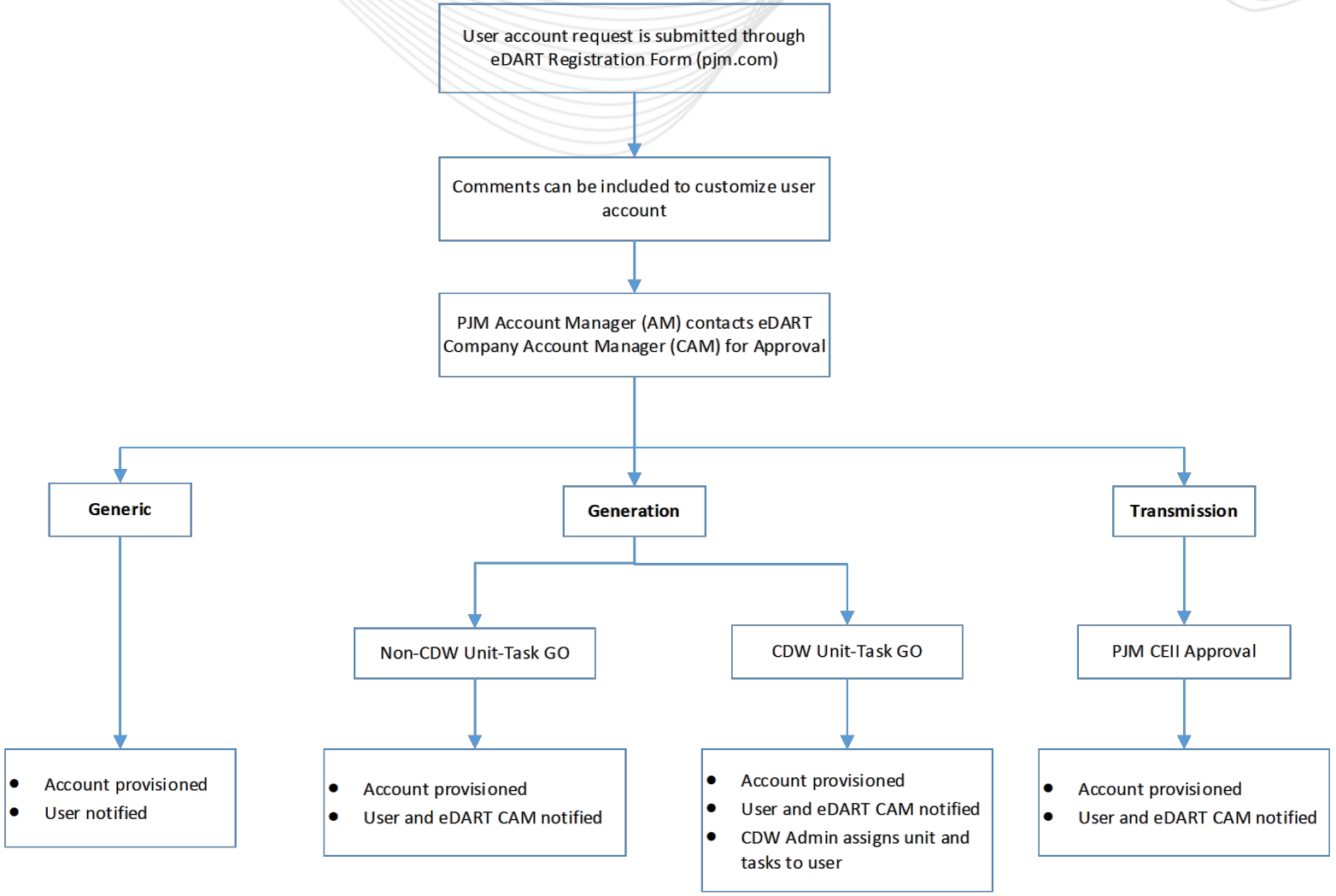
Current eDART Account Process



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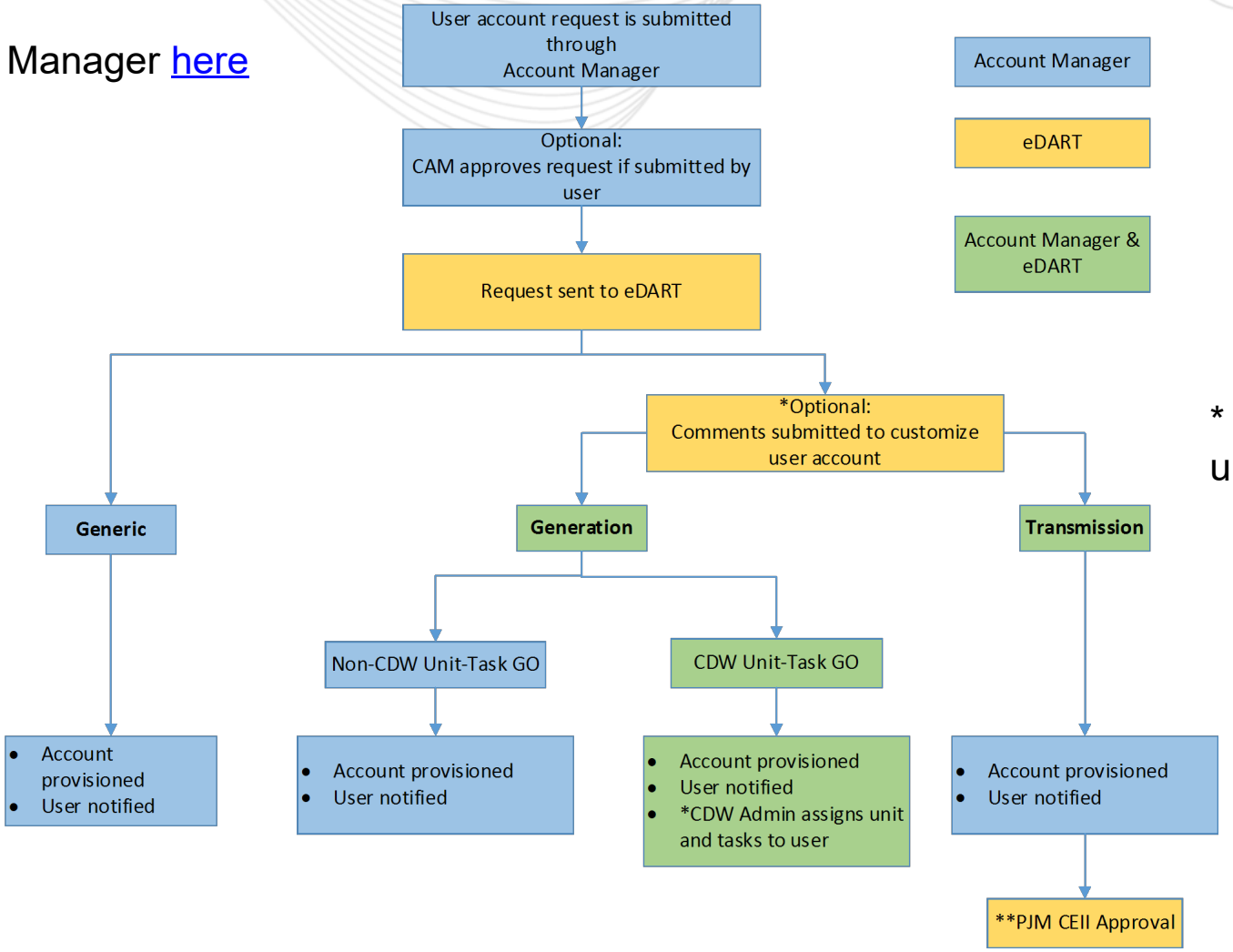
New eDART Account Process

User Guides for Account Manager here



* User access will be limited until completed

** User login in eDART blocked until completed

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New User Accounts

- User account creation required in Account Manager.
  - Account Manager has user name requirements that differ from eDART. It is not guaranteed that an eDART user name can be utilized in Account Manager because of those requirements and/or the fact that the user name may already be in use.
  - Account Manager username requirements:
    - Between 6 and 12 characters
    - First character cannot be a special character. Allowed special characters are ()!$~`^_{}

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Resources and References

- Account Manager User Guides: https://pjm.com/markets-and-operations/etools/account-manager
- Member Maintenance User Guide: https://pjm.com/-/media/etools/membership-management-community/member-maintenance-user-guide.ashx
- Migration FAQ: https://pjm.com/-/media/committees-groups/forums/edart/postings/migration-to-account-manager-faq.ashx
- eDART Account Types & Application Access: https://pjm.com/-/media/etools/edart/account-types-and-application-access.ashx

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Resources and References

- CDW Unit-Task Overview: https://pjm.com/-/media/etools/edart/edart-unit-task-training.ashx
- CDW Member-Agent Overview: https://pjm.com/-/media/etools/edart/cdw-member-agent-functionality.ashx

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Thank you!

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