

## Account Manager Frequently Asked Questions

Below is a list of frequently asked questions related to the Account Manager tool. If you have a question that has not been covered below, please consult the [Account Manager User Guide](#) or contact [PJM Member Relations](#).

1. How do I access the Account Manager Application?
  - a. The Account Manager application can be accessed via eSuite/PJM Tools, or by following the Sign In or Register links on the PJM Tools - [Account Manager](#) Page.
2. How does the eSuite/CAM functionality differ from the new Account Manager functionality?
  - a. The Account Manager tool offers a Dashboard which will show a Company Account Manager any pending tasks that they may have for users in their organization.
  - b. The Account Manager tool gives the ability to import users via a CSV file.
  - c. The Account Manager tool has an option for an account manager (administrator) to approve or deny all tool requests for a user account.
  - d. A Company Account Manager can request additional PJM tool access for their organization, which will require PJM approval.
  - e. Account password security
    - i. Initial password requests and password changes will need to be completed within 4 hours of receiving a unique password link via email.
  - f. Users have the ability to terminate their own user account.
  - g. Automatic logout for sessions that are inactive for 15 minutes.
3. Which browsers are supported by the Account Manager tool?

Please reference the PJM Tools system requirements page.  
<http://www.pjm.com/markets-and-operations/etools/system-requirements.aspx>
4. Will the process in requesting an additional organization account (or subaccount) be the same as the previous procedure – i.e. submitting a signed CAM Form to PJM (via mail or digital delivery)?
  - a. The process for creating a new organization account (or subaccount) will remain the same. The existing forms have renamed – “CAM Form A” is now “Authorization Form A” and “CAM Form B” is now “Designation Form B/B1”
    - i. If you are creating a new member account and are ready to use PJM tools, both “Authorization Form Form A” and “Designation Form B/B1 – pg1” must still be submitted to PJM.
    - ii. A “Designation Form B/B1 – pg1” is required for the creation of new subaccounts.
    - iii. The B1 portion of Designation Form B/B1 addresses Single User Multi Account (SUMA) setup for CAM’s – pg2-3)
  - b. Note - A “Designation Form B/B1” is no longer required for additional tool access for existing organizations. The Account Manager tool allows existing organizations to request additional PJM tools, which require PJM approval. See 2c above.

5. Will the process requesting updates to CAM Administrators for organization accounts be the same -- submitting CAM Form B (now named "Designation Form B/B1")?
  - a. A "Designation Form B/B1" is required for changes or additions to account managers (CAM Administrator).
  
6. As an Account Administrator for multiple organization accounts, will I be able to see all the users under those organization accounts?
  - a. Yes – You must register to be a Single User Multi Account (SUMA) CAM. Designation Form B/B1 must be completed and sent to PJM CAM Administrators to setup your SUMA account. See the Account Manager page - <http://www.pjm.com/markets-and-operations/etools/account-manager.aspx> for additional information.
  
7. Why am I receiving an "Outdated Browser" error on the PJM Single Sign-On page using Internet Explorer 11?
  - a. IE changed the standard convention on how to retrieve the browser version. Previously it was sent over in the user-agent info as the browser version, like MSIE:9.0 or Chrome/11.0. IE now has a special way of defining the version as rv:11.0. PJM's SSO page cannot find the version and assumes it is invalid. This will not prevent you from logging into to the Account Manager tool and performing normal tool functions. PJM will be addressing this configuration change in the future.



8. What tools are SUMA enabled?

The tools listed below are SUMA enabled, which means if you wish to link your secondary user accounts to a primary user account, only the tools below will be accessible with your SUMA user account.

- a. Account Manager
- b. Billing Line Item Transfer
- c. Bulletin Board
- d. DR Hub
- e. ExSchedule
- f. FTR Center
- g. InSchedule
- h. Markets Gateway
- i. Planning Center - Gen Model

- j. Planning Center - Queue Point
- k. Power Meter
- l. Resource Tracker

9. What are the non-Suma enabled tools?

- a. Customer Outage
- b. Dataminer
- c. eCredit – Will be enabled once refreshed
- d. edatafeed
- e. eRPM – Will be enabled once refreshed
- f. Emergency Procedures
- g. Gas Pipeline
- h. Messages
- i. MSRS – Targeting Q2-2018 enablement
- j. OASIS – Will be enabled once refreshed
- k. PCLLRW
- l. Voting

10. Are there any changes to the existing SUMA CAM(s) user accounts in Account Manager?

- a. No, if CAM(s) have an existing SUMA account, there are no changes to be made. However, SUMA CAM(s) can now add non-SUMA enabled and SUMA enabled tools access to the primary account.
- b. Only SUMA enabled tools can be added to the secondary accounts.

11. What does My Tools Home page display?

- a. The PJM My Tools Home page displays a listing of the tools the user has access to for both the users primary and secondary accounts. The user will have the ability to launch the tool by selecting 'Tool' under the application name.
- b. The user should be taken to the tool for the primary account; however, if the tool is not granted on the primary account but it is on multiple secondary accounts, it will take the user to the company account that the user had visited most recently. If user did not visit any applications, it will take the user to the company account by alphabetical order by default. ***The user should ensure they are transacting against the appropriate company account by checking the top right of the UI page (see #13 below).***

12. Do the tools listed under My Tools dropdown indicate the tool access I have for the company page I am logged into?

- a. No, tools listed under My Tools dropdown are the combined access for the user's primary and all secondary accounts.
- b. The tools on the primary accounts are displayed under Tools Home in blue.
- c. The tools only on the secondary accounts are displayed under Tools Home in black.
- d. 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.

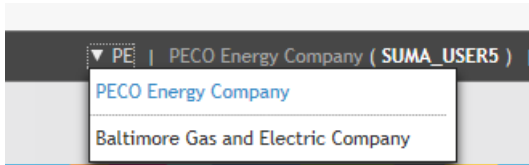
13. How can I tell which company I am logged into?

- a. Company Name is located on the top right hand side of the page next to the user name.

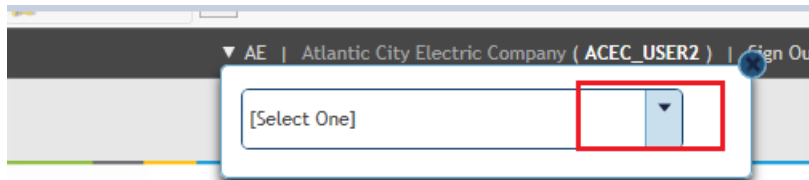


14. How do I switch companies?

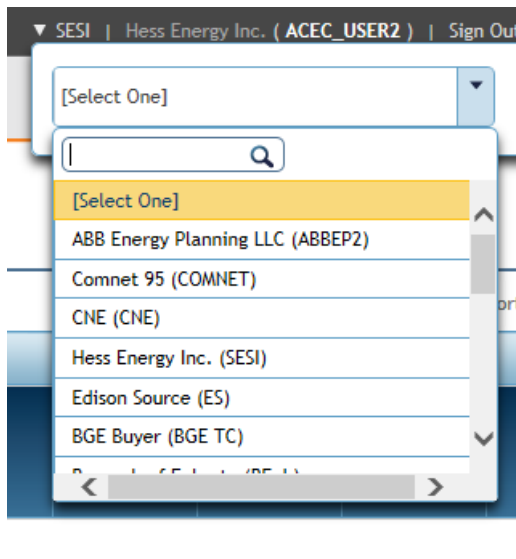
- a. Using company dropdown menu, select the company account you would like to be logged into.
- b. The screenshot below displays the company dropdown menu for 10 or less company accounts.



- c. The screenshot below displays the company dropdown menu for 10 or more company accounts. You may type in the company account name or shortname to retrieve your company or use the dropdown menu inside the text box.



- d. If the user clicks on the dropdown menu inside the box, the screenshot below displays the company dropdown menu for all companies you have access to.



15. If I navigate directly to a tool with a SUMA user who has access to more than one company account, which company can I expect to land on?

The primary account, if it has access to the tool. Other wise, any of the secondary company accounts you most recently visited or by alphabetical order. **The user should ensure they are transacting against the appropriate company account by checking the top right of the UI page (see #13 above).**

16. What is the CLI version required for users submitting browserless transactions against PJM systems with a SUMA system account user?

- a. CLI version of 1.3.0 or higher must be used.
- b. For more information go to the below URL and click on Command Line Interface Documentation on the bottom of the page  
<http://www.pjm.com/markets-and-operations/etools/system-requirements.aspx>

17. How do I set the SetEnv file to a specific account for submitting browserless transactions?

- a. A SUMA user with multiple company accounts can specify the company account that they wish to transact with. To specify the company account, add this additional line to your setenv file and update the specific company account **shortcode**.

**Note: The shortcode is case sensitive. The Shortcode must be capitalized.**

```
set ACCOUNT=-h Suma-Account=company shortcode
```

18. What happens if I REM (comment out) the line (REM set ACCOUNT=-h Suma-Account=**company shortcode**)?

- a. Deleting or REMing this line out would run your browserless transactions from the primary account only. If the primary account does not have the proper access to the requested transaction it will throw 403 errors to the user.

19. I am trying to download information for Company A, why am I getting data for Company B?

- a. Go to your setenv file and check your setting on this line (set ACCOUNT=-h Suma-Account=**company shortcode**)
- b. Make sure you specify the company account shortcode you would like to submit browserless transactions for. If you are specifying a company shortcode on this line, the system will only provide the data for the company specified.
- c. Having REM in front of this line or not having this line at all will only provide user with data for the primary account. If the primary account does not have the proper access to the requested transaction it will throw 403 errors to the user.

20. Why am I getting 403 errors when I am doing browserless transaction with proper access?

- a. You may have 'set ACCOUNT=-h Suma-Account=**company shortcode**' to a company shortcode that you do not have access to.
- b. You may be providing an incorrect account short name for the company.
- c. Your company shortcode may not be in the proper case. **It needs to be all uppercase.**

21. Can a SUMA user also be a System ID user?

- a. Yes, If System ID user logs into PJM Tools (<https://etools.pjm.com/etools>), they will be able to successfully access the PJM Tools homepage. However, System ID users are not

allowed to access the user interface of PJM tools with the exception of Account Manager. Please see the systemID user guide for more information on the System ID.  
<http://www.pjm.com/-/media/etools/account-manager/account-manager-user-guide.ashx?la=en>