

# eDART Company Distributed Workflow (CDW) Unit-Task Functionality

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Unit/Task functionality enables the distribution of eDART tasks and/or units to responsible parties.

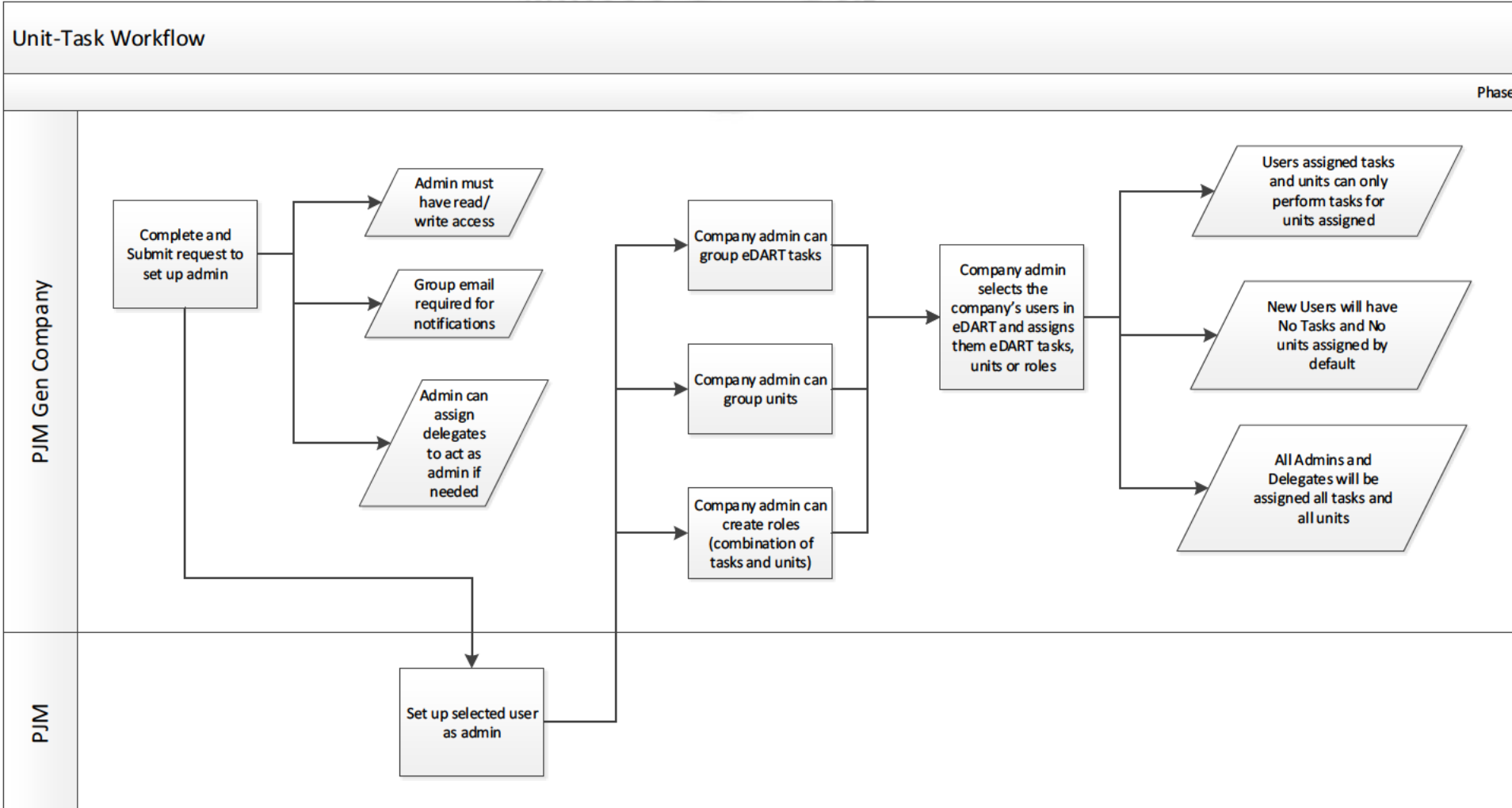
- Ability to discretely assign tasks / units per user.
- User visibility restricted to assigned tasks and units.
- eDART tasks can be fleet or unit (non-fleet) tasks.
  - Fleet tasks are to be performed for all units in the fleet and cannot be assigned per unit.
  - Unit tasks can be performed per units and assigned as such.

## Fleet Tasks:

- IRC
- MinGen
- GO Survey - Company

## Unit Tasks:

- Generation Tickets
- Reactive Testing Tickets
- Blackstart Calculator
- Voltage Schedule - Unit
- GO Survey - Unit



- eDART CDW Unit Task Setup needs to be completed to have CDW enabled for the Generation company.
  - Must be completed via DocuSign by a company officer.
  - Identify admin & delegate(s)
    - Admin & delegate(s) need Account Manager (AM) and eDART accounts with the same user ID
  - Provide group email address
    - Notification will be sent if admin and/or delegates lose access/role.

The Company admin (CDW Admin) can set up delegates.

Delegates are authorized users that can act as an admin. Delegates and admins have the same access and rights except that delegates cannot set up other delegates.

- Log into Account Manager
- Click on eDART CDW tab then User Maintenance.
- Click on Assign under Delegate Details and select the delegate(s) from the list of users.
- To remove the delegate, click on the Terminate Access icon under Actions.

User Profile **eDART CDW**

Contracts User Maintenance

Account Distribution Email  
group@company.com

Admin Detail  
First Name  
GEM

Delegate Details  
1 First Name  
GEM

Actions

**Assign**

**Assign CDW Delegate**

<input type="checkbox"/>	First Name	Last Name	Username	Email
<input checked="" type="checkbox"/>	GEM	User	gemuser	user@company.com

**Save** **Cancel**



Log into eDART; click on My eDART then CDW to access the Unit/Task admin functionality.

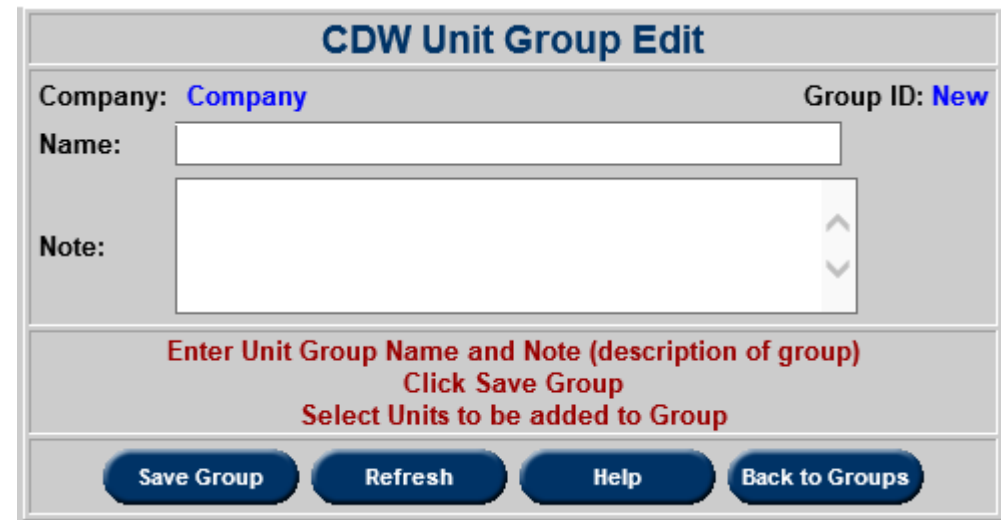
- This is available to admins and delegates.

Buttons and text in red indicate that user or unit assignments are required.



To create a Unit Group:

- Click on Unit Group Setup then Add Group
- Enter Unit Group Name and Note (description of group)
- Click Save Group
- Select units to be added to Group

The form is titled "CDW Unit Group Edit" in a blue header. It contains a "Company:" field with the value "Company" and a "Group ID:" field with the value "New". Below these are a "Name:" text input field and a "Note:" text area with a vertical scrollbar. At the bottom, there are four buttons: "Save Group", "Refresh", "Help", and "Back to Groups".

**CDW Unit Group Edit**

Company: **Company** Group ID: **New**

Name:

Note:

**Enter Unit Group Name and Note (description of group)**  
**Click Save Group**  
**Select Units to be added to Group**

**Save Group** **Refresh** **Help** **Back to Groups**

To edit a Unit Group:

- Click on Unit Group Setup then the name of the group.
- Edit Unit Group Name and Note (description of group)
- Select units to be added to Group
- Check Delete to remove units from Group

### CDW Unit Group Edit

Company: [Company](#)
Group ID: **22**

Name:

Note: 

Group of units for demo

Enter Unit Group Name and Note (description of group)  
Click Save Group  
Select Units to be added to Group

Roles: **None**

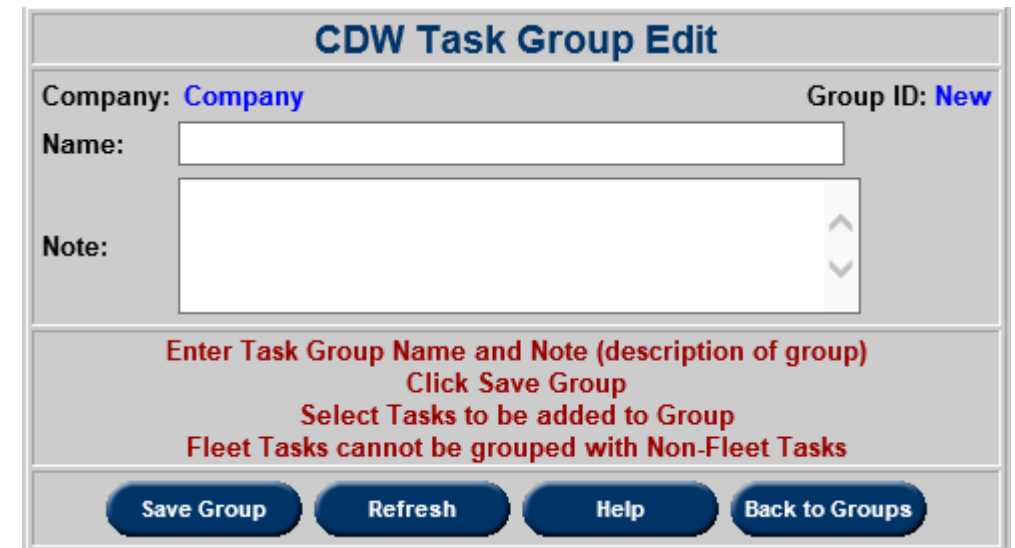
#### Group Units (5)

Delete	Unit ID	Commercial Name	Unit Type	Installed Capacity	Effective Date	Terminate Date
	New	<input type="text"/>				
<input type="checkbox"/>	89552101	UNIT 1	Combustion Turbine	1000 MW	02/07/2008	
<input type="checkbox"/>	7658	UNIT 2	Combustion Turbine	1000 MW	04/26/2007	
<input type="checkbox"/>	7661	UNIT 3	Combustion Turbine	1000 MW	04/26/2007	
<input type="checkbox"/>	170863	UNIT 4	Combustion Turbine	0 MW	07/05/2016	
<input type="checkbox"/>	170864	UNIT 5	Combustion Turbine	0 MW	07/05/2016	

Save Group
Refresh
Help
Back to Groups

To create a Task Group:

- Click on Unit Group Setup then Add Group
- Enter Task Group Name and Note (description of group)
- Click Save Group
- Select tasks to be added to Group  
(note that a group can only contain fleet tasks or only non-fleet tasks)



The screenshot shows a web form titled "CDW Task Group Edit". At the top, it displays "Company: Company" and "Group ID: New". Below this are two input fields: "Name:" with a text box and "Note:" with a larger text area. A red instruction block follows, stating: "Enter Task Group Name and Note (description of group)", "Click Save Group", "Select Tasks to be added to Group", and "Fleet Tasks cannot be grouped with Non-Fleet Tasks". At the bottom, there are four buttons: "Save Group", "Refresh", "Help", and "Back to Groups".

To edit a Task Group:

- Click on Task Group Setup then the name of the group.
- Edit Task Group Name and Note (description of group)
- Select tasks to be added to Group
- Check Delete to remove tasks from Group

### CDW Task Group Edit

Company: **Company** Group ID: **22**

Name:

Note: 

Group of fleet tasks

Enter Task Group Name and Note (description of group)  
Click Save Group  
Select Tasks to be added to Group  
Fleet Tasks cannot be grouped with Non-Fleet Tasks

Group Tasks	
Delete	Description
New	▼
<input type="checkbox"/>	GO Survey - Company - (Fleet)
<input type="checkbox"/>	IRC - (Fleet)
<input type="checkbox"/>	MinGen - (Fleet)

Save Group
Refresh
Help
Back to Groups

Roles are a combination of a Unit/Unit Group and a Task/Task Group.

To create a Role:

- Click on Role Setup then Add Role
- Enter Role Name and Note (description of role)
- Select Unit/Unit Group and Task/Task Group to be added to the Role.
- Click Save Role
- After a Role is created, user assignments can be made from the same screen.



### CDW Role Edit

Company: **Company** Role ID: **New**

Name:

Note:

**Enter Role Name and Note (description of role)**  
**Select Unit and Task OR**  
**Select Unit and Task Group OR**  
**Select Unit Group and Task OR**  
**Select Unit Group and Task Group**  
**Click Save Role**  
**Fleet Tasks only be combined with 'Fleet' Unit Group**

Unit:   Unit Group:

---

Task:   Task Group:

To edit a Role:

- Click on Role Setup then the name of the Role.
- Edit Role Name and Note (description of role)
- Edit Unit/Unit Group and Task/Task Group selections.
- Assign users to the Role or delete user assignments to the Role as needed.

As assigned, Test User 1 will have access to all the units in the Steam Units group and will be able to perform all the tasks in the Plant Tasks group.

### CDW Role Edit

Company: [Company](#) Role ID: 25

Name:

Note:

**Enter Role Name and Note (description of role)**  
**Select Unit and Task OR**  
**Select Unit and Task Group OR**  
**Select Unit Group and Task OR**  
**Select Unit Group and Task Group**  
**Click Save Role**  
**Fleet Tasks only be combined with 'Fleet' Unit Group**

Unit:  Unit Group:  [Edit Group](#)

Task:  Task Group:  [Edit Group](#)

Role Assignments (1)	
Delete	User
<a href="#">Assign</a>	<input type="text" value=""/>
<input type="checkbox"/>	Test User 1 (RW)

[Save Role](#) [Refresh](#) [Help](#) [Back](#)



User Assignments can be done from the Role Setup forms (see previous section) or from the User Assignment form.

To assign users/distribute work:

- Click on User Assignment and select User
- Add Units and Non-Fleet Tasks to User AND/OR add Role(s) to User
- Delete any assignments no longer needed by checking Delete

### CDW User Assignment

Company: [Company](#)      User:  ▼

Select User  
 Add Individual Units and Non-Fleet Tasks to User AND/OR  
 Add Role(s) to User

Individual Assignments (0)			Role Assignments (1)											
Unit: <input type="text"/>	Task: <input type="text"/>	<input type="button" value="Add"/>	Role: <input type="text"/>	<input type="button" value="Add"/>										
<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="padding: 2px;">Delete</td> <td style="padding: 2px;">Unit</td> <td style="padding: 2px;">Task</td> </tr> <tr> <td colspan="3" style="padding: 2px; color: red; font-weight: bold;">No Individual Assignments</td> </tr> </table>			Delete	Unit	Task	No Individual Assignments			<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="padding: 2px;">Delete</td> <td style="padding: 2px;">Role</td> </tr> <tr> <td style="padding: 2px; text-align: center;"><input type="checkbox"/></td> <td style="padding: 2px;"><a href="#">role 1 dr</a></td> </tr> </table>		Delete	Role	<input type="checkbox"/>	<a href="#">role 1 dr</a>
Delete	Unit	Task												
No Individual Assignments														
Delete	Role													
<input type="checkbox"/>	<a href="#">role 1 dr</a>													

To assign users/distribute work per unit:

- Click on Unit Assignment and select Unit
- Assign User and Non-Fleet Tasks to User AND/OR add Role(s) to User (click on Role to get to Role form to add user)
- Delete any assignments no longer needed by checking Delete

### CDW Unit Assignment

Company: [Company](#) Unit:  ▼

**Select Unit**  
Assign User and Non-Fleet Tasks to User AND/OR  
Add Role(s) to User

Individual Assignments (0)	Role/ Unit Group Assignments (0 / 0)														
User: <input type="text" value=""/> <span>▼</span> Task: <input type="text" value=""/> <span>▼</span> <input type="button" value="Add"/>															
<table border="1" style="margin: auto;"><tr><td>Delete</td><td>User</td><td>Task</td></tr><tr><td colspan="3" style="text-align: center;"><b>No Individual Assignments</b></td></tr></table>	Delete	User	Task	<b>No Individual Assignments</b>			<table border="1" style="margin: auto;"><tr><td>Role</td><td>Assigned</td></tr><tr><td colspan="2" style="text-align: center;"><b>No Role Assignments</b></td></tr><tr><td colspan="2" style="text-align: center;">Unit Group</td></tr><tr><td colspan="2" style="text-align: center;"><b>No Group Assignments</b></td></tr></table>	Role	Assigned	<b>No Role Assignments</b>		Unit Group		<b>No Group Assignments</b>	
Delete	User	Task													
<b>No Individual Assignments</b>															
Role	Assigned														
<b>No Role Assignments</b>															
Unit Group															
<b>No Group Assignments</b>															

The Assignment Report can be viewed in Unit or User mode and gives an overview of assignments to help the Unit/Task admin and delegate identify any missing areas of coverage.

By default, Authorized Users (admins and delegates) are excluded from the report as they are granted access to all units and all tasks.

In Unit Mode, user can click Apply Filter to view all units or select the Unit from the drop down to view assignments for one unit.

In User Mode, user can click Apply Filter to view all users or select a User from the drop down to view assignments for that user.



Click on unit name to open unit assignment form

### CDW Assignment Report

Report Mode:  Unit  User    Company:     Unit:     Include Auth. Users:

Un-Assigned Units: 7	Tasks							
Unit	Blackstart Calculator	GO Survey - Company (F)	GO Survey - Unit	Generation Tickets	IRC (F)	MinGen (F)	Reactive Testing Tickets	Voltage Schedule Unit
<a href="#">UNIT 1</a>	NO	NO	NO	NO	NO	NO	NO	NO
<a href="#">UNIT 2</a>	NO	NO	NO	NO	NO	NO	NO	NO
<a href="#">UNIT 3</a>	Yes	NO	NO	Yes	NO	NO	Yes	Yes
<a href="#">UNIT 4</a>	Yes	NO	NO	Yes	NO	NO	Yes	Yes
<a href="#">UNIT 5</a>	Yes	NO	NO	Yes	NO	NO	Yes	Yes
<a href="#">UNIT 6</a>	Yes	NO	NO	Yes	NO	NO	Yes	Yes
<a href="#">UNIT 7</a>	NO	NO	NO	NO	NO	NO	NO	NO

Click on user name to open unit assignment form

**CDW Assignment Report**

Report Mode:  Unit  User    Company:    User:

[Apply Filter](#)   [Help](#)   [Main Menu](#)

User	Individual Assignments	Role Assignments
<a href="#">Test User 3 (RW)</a>		
<a href="#">Test User 4 (RW)</a>		
<a href="#">Test User 1 (RW)</a>		<a href="#">role 1 dr</a>
<a href="#">Test User 2 (RW)</a>	UNIT 1-2 - Blackstart Calculator	

[Main Menu](#)

- Generation users in a CDW Generation company can see what units and tasks they have been granted access to by clicking on My eDART.

**My eDART Form**

Company: \_\_\_\_\_ User ID: \_\_\_\_\_

Functionality	Display
Display Calendar Pop-Up	Yes ▾
FeedBack Form	Yes ▾
Gen. Ticket	Yes ▾
Hydro Calc	Yes ▾
Instantaneous Reserve Check	Yes ▾
Minimum Gen. Report	Yes ▾
My eDART	Yes ▾
PJM Status Report	Yes ▾
XML Download	Yes ▾
XML Upload	Yes ▾

**CDW Unit/Task Assignments**

Unit	Tasks							
	Blackstart Calculator	GO Survey - Company (F)	GO Survey - Unit	Generation Tickets	IRC (F)	MinGen (F)	Reactive Testing Tickets	Voltage Schedule
	Yes	NO	Yes	Yes	Yes	Yes	Yes	Yes
	Yes	NO	Yes	Yes	Yes	Yes	Yes	Yes
	Yes	NO	Yes	Yes	Yes	Yes	Yes	Yes
	Yes	NO	Yes	Yes	Yes	Yes	Yes	Yes
	Yes	NO	Yes	Yes	Yes	Yes	Yes	Yes
	Yes	NO	Yes	Yes	Yes	Yes	Yes	Yes