

Merge User and Migrate User Quick Guide

Migrate User Overview:

During migration current user account is moved to a newly selected primary Main Member user account.

Active Accesses:

- User's active SUMA accesses stays with the same account
- User's active Non-SUMA accesses will move to the new primary account (If the new primary account has the accesses or the access bypass account access). Otherwise, accesses will be terminated
- eDART CDW Delegate or Admin accesses get terminated

Pending Accesses:

- User pending non-SUMA accesses will be transferred to the new company as pending
- User pending SUMA accesses will not be changed

Who Can Migrate?

- PJM CAMs – is able to move any users from one company to another
- SUMA CAMs– are able to migrate those users whom they are CAM for on their primary account
- Member CAMs - (if they are a CAM for only 1 account) Migrate functionality is not available to them

OTHER Account Actions:

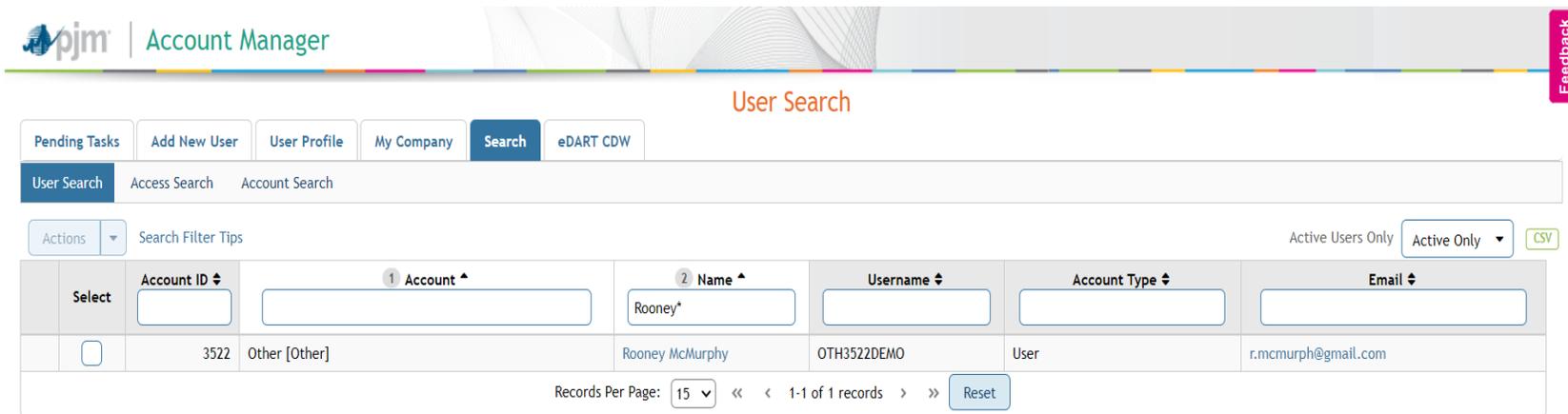
- The user being migrated from OTHER account, all accesses are moved (SUMA/Non-SUMA) **EXCEPT:** [Markets Gateway Public](#) (Generic Access usually only found on the OTHER account) and then that OTHER account is terminated
- OTHER account never has pending accesses as user is not able to request additional access under OTHER
- Username and Password remains the same

How to Migrate User from OTHER Account to Member Company Account: ****PJM CAMs Only****

Merge User and Migrate User Quick Guide

For OTHER user accounts migration to a Member Company Account, the Company Account Manager (CAM) will need to email PJM CAMs at accountmanager@pjm.com to perform OTHER migrate user functionality.

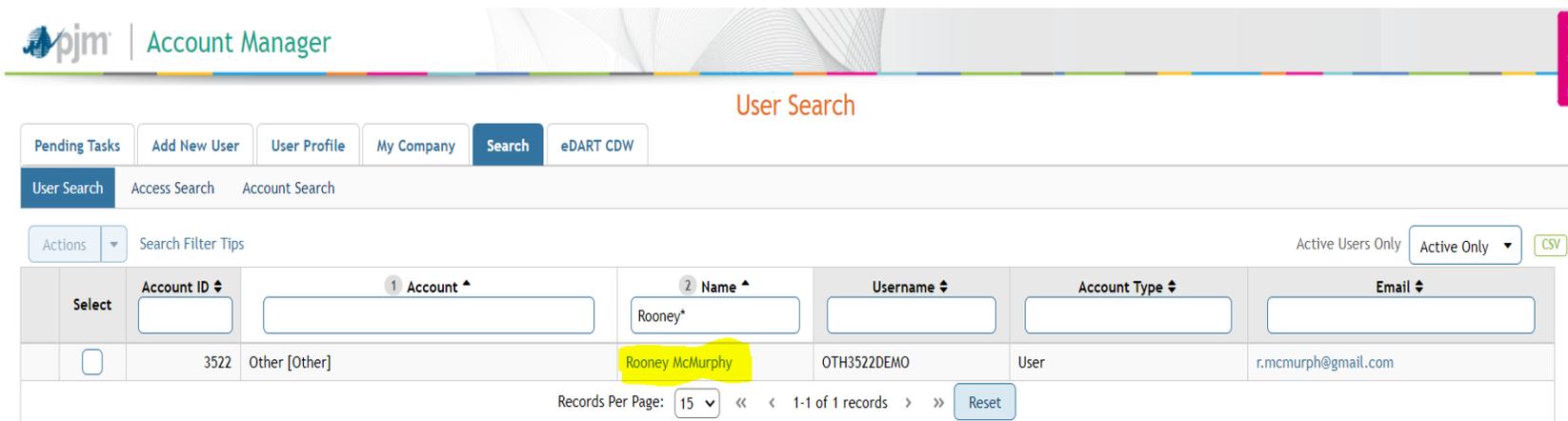
1. Search Tab >> User Search Subtab
2. Name Field >> Type in First and Last Name of User (Can use partial spelling if using wildcards) >> Hit Enter



The screenshot shows the PJM Account Manager interface. At the top, there's a navigation bar with 'Account Manager' and a 'Feedback' button. Below that, a 'User Search' section is active. The search criteria are: Account ID (empty), Account (empty), Name (Rooney*), Username (empty), Account Type (empty), and Email (empty). The search results table shows one record for Rooney McMurphy with Account ID 3522 and Account Type Other [Other]. The interface includes a 'Reset' button and a 'Records Per Page' dropdown set to 15.

Select	Account ID	Account	Name	Username	Account Type	Email
<input type="checkbox"/>	3522	Other [Other]	Rooney McMurphy	OTH3522DEMO	User	r.mcmurph@gmail.com

3. To select the user >> Click on their name



This screenshot is identical to the previous one, but the name 'Rooney McMurphy' in the search results table is highlighted in yellow, indicating the step of selecting the user.

Select	Account ID	Account	Name	Username	Account Type	Email
<input type="checkbox"/>	3522	Other [Other]	Rooney McMurphy	OTH3522DEMO	User	r.mcmurph@gmail.com

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4. View access prior to Migration: User Profile Tab >> Account Access Subtab

[Pending Tasks](#) | [Add New User](#) | **[User Profile](#)** | [My Company](#) | [Search](#) | [eDART CDW](#)
[Profile Information](#) | **[Account Access](#)** | [PKI Certificates](#) | [Migrate User](#)

Account Access

Below are the accounts and tools access that are currently on the account.

[Request Access](#)

Account ID	Account	Account Shortname	Actions		
3522	Other	Other			
Tool	Access Type	Effective Date	Terminate Date	Actions	
Data Viewer	Read/Write	12/14/2020	12/31/9999		
Emergency Procedures	Read Only	12/14/2020	12/31/9999		
Markets Gateway	Public	12/14/2020	12/31/9999		
PJM	Public	12/14/2020	12/31/9999		
Planning Center	Queue Point Read Write	12/14/2020	12/31/9999		
System Map	Read Only	12/14/2020	12/31/9999		

5. From the User Profile Tab >> Click Migrate User Subtab

[Pending Tasks](#) | [Add New User](#) | **[User Profile](#)** | [My Company](#) | [Search](#) | [eDART CDW](#)
[Profile Information](#) | [Account Access](#) | [PKI Certificates](#) | **[Migrate User](#)**

1

2

Select Account

Review

Select the member account in which to migrate Rooney McMurphy's OTH3522DEMO account from PJM DEMO Company 1 to:

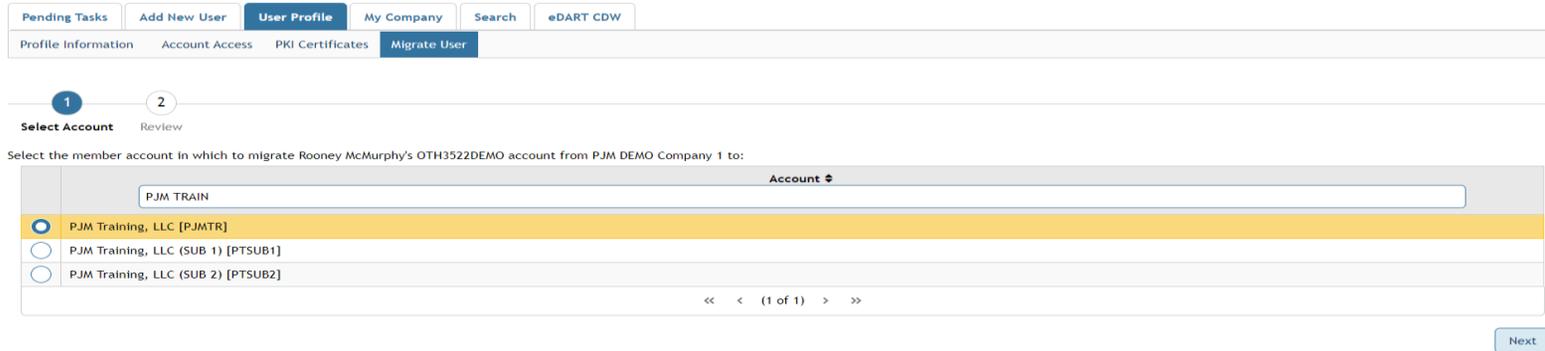
Account
<input type="radio"/> Appalachian Power (AEP Gen) - eDart Temporary Use [AEPeDX]
<input type="radio"/> MidAmerican Energy Company (Supplier Contract) [MECRSC]
<input type="radio"/> Peoples Energy Services (Supplier Contract) [PESCSC]
<input type="radio"/> Constellation NewEnergy, Inc. (Supplier Contract) [NEVSC]
<input type="radio"/> Delmarva Power & Light Company (MD HPS) [DPLMDH]
<input type="radio"/> Allegheny Energy Supply-Wheatland Ctrl Area [AEWCCA]
<input type="radio"/> Duke Energy - Vermillion Control Area [DEVICA]
<input type="radio"/> Dairyland Power Cooperative Control Area [DPC_CA]
<input type="radio"/> Great River Energy - North Control Area [GRENCA]
<input type="radio"/> Great River Energy - South Control Area [GRESKA]

<< < (1 of 2763) > >>

[Next](#)

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- Type Company Account Name into Name Box current user account needs to be migrated to: (**Example PJM TRAIN**) >> Hit Enter
Note: Must type Member company name and not Acronym (Example: If company name is Pennsylvania Jersey Maryland – Cannot search for it as PJM)
- Select Account Name by Clicking the circle before the correct Company Name >> Click NEXT



1 **Select Account** 2 Review

Select the member account in which to migrate Rooney McMurphy's OTH3522DEMO account from PJM DEMO Company 1 to:

Account

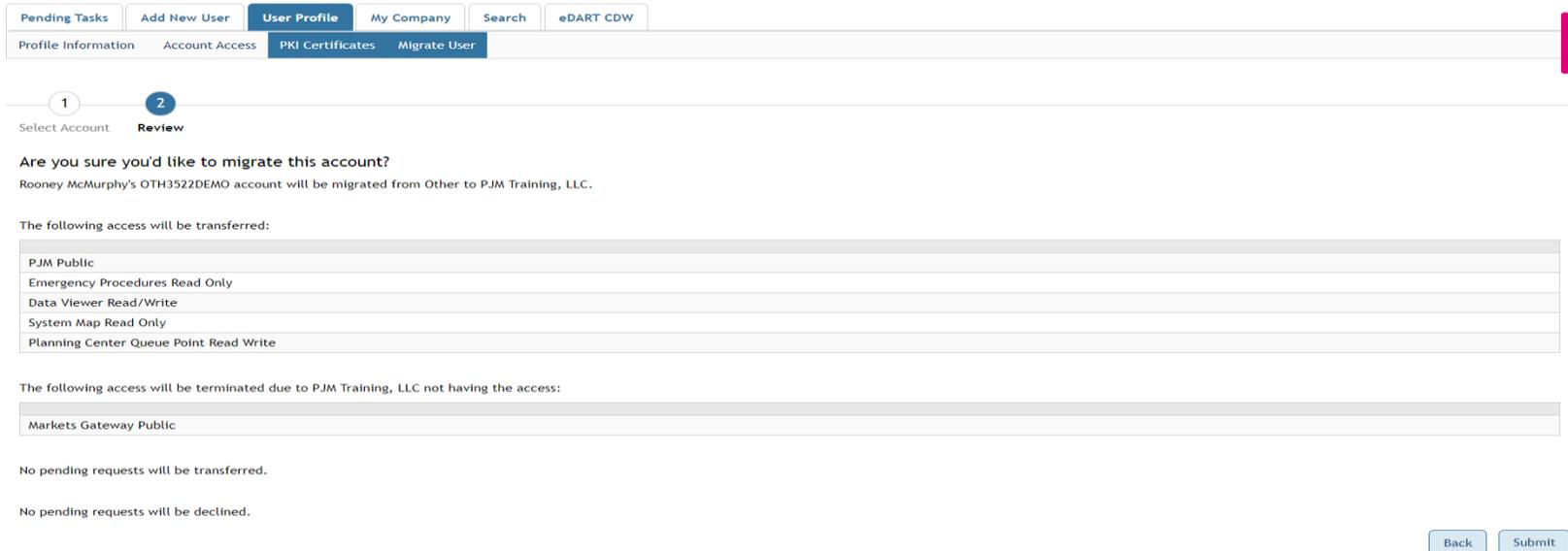
PJM TRAIN

- PJM Training, LLC [PJMTR]
- PJM Training, LLC (SUB 1) [PTSUB1]
- PJM Training, LLC (SUB 2) [PTSUB2]

<< < (1 of 1) > >>

Next

- Review of Account and Accesses that will be Migrated to the new account >> Click Submit



1 Select Account 2 **Review**

Are you sure you'd like to migrate this account?
 Rooney McMurphy's OTH3522DEMO account will be migrated from Other to PJM Training, LLC.

The following access will be transferred:

PJM Public
Emergency Procedures Read Only
Data Viewer Read/Write
System Map Read Only
Planning Center Queue Point Read Write

The following access will be terminated due to PJM Training, LLC not having the access:

Markets Gateway Public

No pending requests will be transferred.

No pending requests will be declined.

Back Submit

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New Main Account Access and Terminated 3522 Other Account:

- Account / Access is terminated under the 3522 OTHER Account
- Access is now under the Main Account

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Feedback

Account Access

Below are the accounts and tools access that are currently on the account.

[Request Access](#)

Account ID	Account	Account Shortname	Actions																																					
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Merge User and Migrate User Quick Guide

To view the history of actions – User Profile Tab >> Profile Information Subtab >> Click History:

[Pending Tasks](#) | [Add New User](#) | **[User Profile](#)** | [My Company](#) | [Search](#) | [eDART CDW](#)

[Profile Information](#) | [Account Access](#) | [PKI Certificates](#) | [Merge User](#) | [Migrate User](#)

Contact Information

First Name * ? Employer *
 Last Name * Phone *
 Title Email *

Profile Information **References**

Username * [Account Managers](#)
 System ID [History](#)
 Terminate account.

[Submit](#)

Events in the History:

Migrated, Access Request Modified, Access Terminated, Access Modified, and Access Request Declined

[Home](#) > [User Profile](#) > [Profile Information](#)

Timestamp ⚡	Event ⚡	Details
12/16/2020 11:32	Access Terminated	Terminated Markets Gateway Public access for Other (Account ID: 3,522).
12/16/2020 11:32	Access Terminated	Terminated Emergency Procedures Read Only access for Other (Account ID: 3,522).
12/16/2020 11:32	Access Terminated	Terminated Data Viewer Read/Write access for Other (Account ID: 3,522).
12/16/2020 11:32	Access Terminated	Terminated System Map Read Only access for Other (Account ID: 3,522).
12/16/2020 11:32	Migrated	User migrated from Other to PJM DEMO Company 1.
12/16/2020 11:32	Access Modified	Modified access from Planning Center Queue Point Read Write to Planning Center Queue Point Read Write for MERLLC (Account ID: 1,881,083).
12/16/2020 11:32	Access Modified	Modified access from PJM Public to PJM Public for MERLLC (Account ID: 1,881,083).
12/16/2020 09:31	Email Address Change	Changed email address from jessica.crown@pjm.com to charbro@gmail.com.
12/16/2020 08:57	Password Change	Password was changed.

Merge User and Migrate User Quick Guide

Merge User Background:

- Using the Merge functionality Account Manager CAMs can consolidate user accounts for people that have more than one account in Account Manager into one SUMA account
- This allows the user to have one log in but still have access to all of their company accounts and approved accesses

Accounts that should not us the Merge User:

- Users with eCREDIT access (Non-SUMA access)
- Users with Voting access (Non-SUMA access)

Who Can Merge?

PJM CAMs, Member CAMs and SUMA CAMs:

- Able to merge user for the companies they are CAM
- If the user is SUMA user (need to be CAM on their Primary account)
- Merge locked users

Following types of users will not appear in secondary selector:

- System ID
- OTHER Account users
- PJM Account users
- Terminated users
- CAM
- SUMA CAM

***Any users with Account Manager R/W access on primary or secondary account will not be on the Merge Page user selection table. ***

Merge User and Migrate User Quick Guide

How to MERGE USER from All users accounts to one SUMA user account:

1. Search Tab >> User Search Subtab
2. Name Field >> Type in First and Last Name of User (Can use partial spelling if using wildcards) >> Hit Enter

User Search

Pending Tasks Add New User User Profile My Company Search eDART CDW

User Search Access Search Account Search

Actions Search Filter Tips Active Users Only Active Only CSV

Select	Account ID	Account	Name	Username	Account Type	Email
<input type="checkbox"/>	1881104	PJM DEMO Company 1 (SUB 1) [MRSUB1]	Elinor Rigby	ERdemoMrg4	User	elinor.rigby@pjm.com
<input type="checkbox"/>	1881083	PJM DEMO Company 1 [MERLLC]	Elinor Rigby	ERdemoMrg2	User	elinor.rigby@pjm.com
<input type="checkbox"/>	1881107	PJM DEMO Company 2 (SUB 2) [MGSUB2]	Elinor Rigby	ERdemoMR3	User	elinor.rigby@pjm.com
<input type="checkbox"/>	1881082	PJM Training, LLC [PJMTR]	Elinor Rigby	ERDemoMerge	User	elinor.rigby@pjm.com

Records Per Page: 15 << < 1-4 of 4 records > >> Reset

3. To select the user click on their name which will be the new Main Company of their SUMA user account:

User Search

Pending Tasks Add New User User Profile My Company Search eDART CDW

User Search Access Search Account Search

Actions Search Filter Tips Active Users Only Active Only CSV

Select	Account ID	Account	Name	Username	Account Type	Email
<input type="checkbox"/>	1881104	PJM DEMO Company 1 (SUB 1) [MRSUB1]	Elinor Rigby	ERdemoMrg4	User	elinor.rigby@pjm.com
<input type="checkbox"/>	1881083	PJM DEMO Company 1 [MERLLC]	Elinor Rigby	ERdemoMrg2	User	elinor.rigby@pjm.com
<input type="checkbox"/>	1881107	PJM DEMO Company 2 (SUB 2) [MGSUB2]	Elinor Rigby	ERdemoMR3	User	elinor.rigby@pjm.com
<input type="checkbox"/>	1881082	PJM Training, LLC [PJMTR]	Elinor Rigby	ERDemoMerge	User	elinor.rigby@pjm.com

Records Per Page: 15 << < 1-4 of 4 records > >> Reset

4. View access prior to Merger: User Profile Tab >> Account Access Subtab:

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Account Access

Below are the accounts and tools access that are currently on the account.

[Request Access](#)

Account ID	Account	Account Shortname	Actions		
1881082	PJM Training, LLC	PJMTR			
Tool	Access Type	Effective Date	Terminate Date	Actions	
Billing Line Item Transfer	Read/Write	12/14/2020	12/31/9999		
eCredit	R/W with Collateral	12/14/2020	12/31/9999		
eCredit	Read Only	12/14/2020	12/31/9999		
eCredit	Read/Write	12/14/2020	12/31/9999		
Member Community	Public	12/14/2020	12/31/9999		
MSRS	Read Only	12/14/2020	12/31/9999		
PJM	Public	12/14/2020	12/31/9999		
Voting	Read/Write	12/14/2020	12/31/9999		

5. From the User Profile Tab >> Click MERGE USER Subtab

[Pending Tasks](#) | [Add New User](#) | **[User Profile](#)** | [My Company](#) | [Search](#) | [eDART CDW](#)
[Profile Information](#) | [Account Access](#) | [PKI Certificates](#) | **[Merge User](#)** | [Migrate User](#)

1

2

Select Accounts Confirm Changes

Select Accounts

Select the accounts that will be merged into the ERDemoMerge account.

Search:

Select User

- ERdemoMR3
- ERdemoMrg2**
- ERdemoMrg4

[>](#)
[>>](#)
[<](#)
[<<](#)

Search:

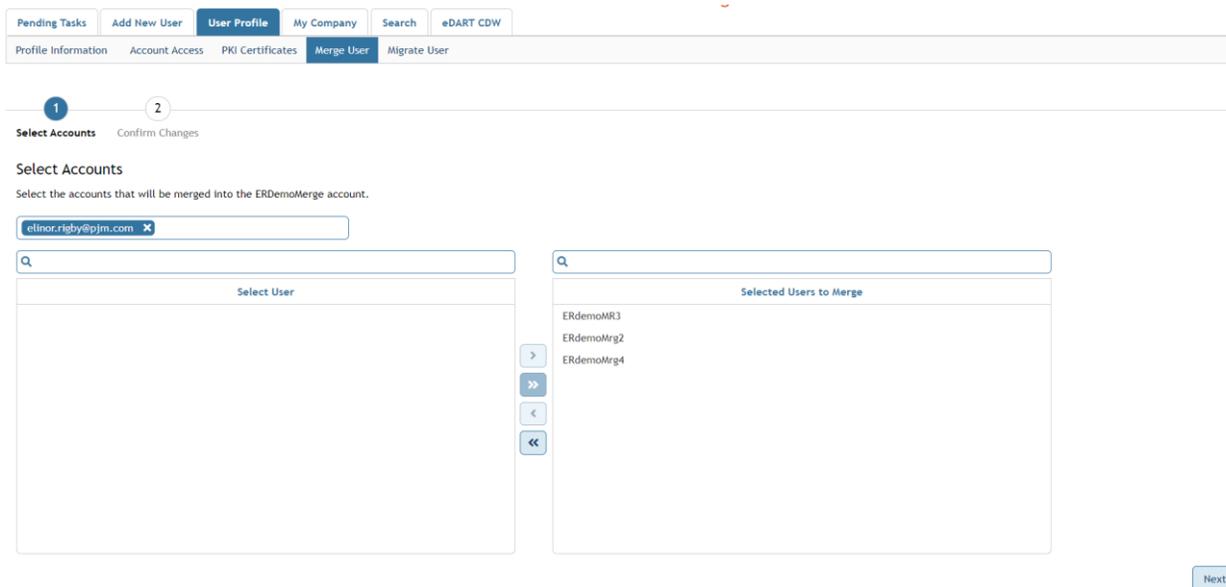
Selected Users to Merge

[Next](#)

Merge User and Migrate User Quick Guide

From the Merge User screen:

1. Check email(s) from User Search screen (User may have used more than 1 email address)
 - Can use a CSV file of the user for multiple email addresses
 - Type or Copy and paste additional email address from the CSV sheet entry box, as needed
 - More than 1 email addresses can be added to the secondary selector
 - User can be searched by user ID using search magnifying glass icon, Only users for the email addresses entered will display in the selector
 - User ID searched maybe correct but email address could be different than the filtered
 - If user being searched has Account Manager R/W access or System ID, will not show here
2. Select User Account(s) to Merge >> Click Next



6. Review of Account(s) and Accesses that will be merged to the new SUMA User account >> Click Submit

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[Add New User](#)
[User Profile](#)
[My Company](#)
[Search](#)
[eDART CDW](#)

[Profile Information](#)
[Account Access](#)
[PKI Certificates](#)
[Merge User](#)
[Migrate User](#)

- 1 Select Accounts
- 2 **Confirm Changes**

Confirm Changes

Warning

User ERdemoMr2 has effective access for PJM Public which is not SUMA enabled
 User ERdemoMr2 has effective access for Member Community Public which is not SUMA enabled

Access to be Transferred to ERdemoMerge

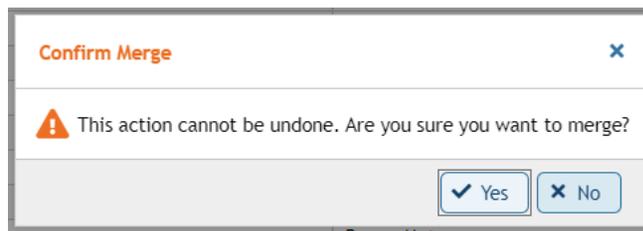
Account Name	Account Short Name	Tool	Qualification
PJM DEMO Company 2 (SUB 2)	MGSUB2	Resource Tracker	Read/Write
PJM DEMO Company 2 (SUB 2)	MGSUB2	Power Meter	Read/Write
PJM DEMO Company 1 (SUB 1)	MRSUB1	MSRS	Read Only
PJM DEMO Company 1 (SUB 1)	MRSUB1	Bulletin Board	Read/Write
PJM DEMO Company 1 (SUB 1)	MRSUB1	Billing Line Item Transfer	Read/Write

Accounts to be Terminated

Username	Employer	First Name	Last Name	Email	System ID
ERdemoMR3	MGSUB2	Elinor	Rigby	elinor.rigby@pjm.com	
ERdemoMr2	MERLLC	Elinor	Rigby	elinor.rigby@pjm.com	
ERdemoMr4	MRSUB1	Elinor	Rigby	elinor.rigby@pjm.com	

[Back](#) [Submit](#)

7. Confirm Submission Warning to Proceed with Merge:



Merge User and Migrate User Quick Guide

To view the history of actions:

1. Search Tab >> User Search Subtab
2. Change Active Users Only drop down to Show All
3. Name Field >> Type in First and Last Name of User (Can use partial spelling if using wildcards) >> Hit Enter
4. Click Name >> User Profile screen >> Click History

User Search

Pending Tasks | Add New User | User Profile | My Company | **Search** | eDART CDW

User Search | Access Search | Account Search

Actions | Search Filter Tips | Active Users Only | Show All

Select	Account ID	Account	Name	Username	Account Type	Email
<input type="checkbox"/>	1881104	PJM DEMO Company 1 (SUB 1) [MRSUB1]	Elinor Rigby	ERdemoMrg4	User	elinor.rigby@pjm.com
<input type="checkbox"/>	1881083	PJM DEMO Company 1 [MERLLC]	Elinor Rigby	ERdemoMrg2	User	elinor.rigby@pjm.com
<input type="checkbox"/>	1881107	PJM DEMO Company 2 (SUB 2) [MGSUB2]	Elinor Rigby	ERdemoMR3	User	elinor.rigby@pjm.com
<input type="checkbox"/>	1881082	PJM Training, LLC [PJMTR]	Elinor Rigby	ERDemoMerge	SUMA	elinor.rigby@pjm.com

Records Per Page: 15 | 1-4 of 4 records | Reset

Events in the History:

Migrated, Access Request Modified, Access Terminated, Access Modified, and Access Request Declined

Home > User Profile > Profile Information

Timestamp	Event	Details
12/14/2020 14:18	Access Terminated	Terminated MSRS Read Only access for MRSUB1 (Account ID: 1,881,104).
12/14/2020 14:18	Access Terminated	Terminated Bulletin Board Read/Write access for MRSUB1 (Account ID: 1,881,104).
12/14/2020 14:18	Access Terminated	Terminated Billing Line Item Transfer Read/Write access for MRSUB1 (Account ID: 1,881,104).
12/14/2020 14:18	Terminated	Account terminated.
12/14/2020 14:17	Merged	User merged to user ERDemoMerge.

Merge User and Migrate User Quick Guide

SUMA Enabled Applications:

- Account Manager
- BLIT
- Bulletin Board
- Capacity Exchange
- Competitive Planner
- DER Directory
- DR Hub
- ExSchedule
- FTR Center
- InSchedule
- Markets Gateway
- MSRS
- OASIS
- Planning Center
- Planning Center Gen Model
- Power Meter
- Resource Tracker

Non-SUMA Enabled Applications:

- Certificate Based Authentication
- Data Miner
- Data Viewer
- Data Miner 2
- eCredit
- eDART
- eDatafeed
- eGADS
- Emergency Procedures
- Gas Pipeline
- Messages
- Member Community
- My PJM
- PCLLRW
- PJM Connect
- System Maps
- Voting