

Single User Multi-Account (SUMA) Quick Guide



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Single User Multi-Account (SUMA)

Overview

A Single User Multi-Account (SUMA) provides the ability to link multiple accounts and SUMA enabled tool access to a single primary user account.

Users may create a new user account or convert an existing user account as their primary SUMA account for which all other accounts and tool access will be linked to. Once the user account has been created or selected, SUMA functionality will allow users to request company account access to other accounts and tools under the same user.

Note to CAMs: Member CAMs who are CAMs to multiple accounts and want to link them under a single user account should contact their authorized individual (authorized representative, maintenance manager or officer) from their company to submit this request via the [Membership Management Community](#) under [Maintenance](#) on your behalf.

RULES

- The primary account is the only account that will have the default tools access. Default tools are: Data Miner 2 API, Member Community public, and My PJM public.
- All tool access requests would require approval from the company CAM.
- Both SUMA enabled and non-SUMA enabled tools can be requested for the primary company account.
- Only SUMA enabled tools can be requested for the secondary accounts.

BENEFITS OF USING SINGLE USER MULTI-ACCOUNT (SUMA)

- Company accounts are accessible via one account password.
- User experience – users can move between company accounts securely without having to log in each time.

How to Create a New Single User Multi-Account

Account Manager can be accessed from PJM's [Account Manager Page](#): [pjm.com](#) > Home > Markets & Operations > PJM Tools > Account Manager.

1. Click **Register** for the appropriate environment in which you require a SUMA user account.

Account Manager

Account Manager is a tool used to create accounts and request and grant access to PJM's tools and website.

Production: [Sign In](#) [Register](#)
Train Environment: [Sign In](#) [Register](#)

2. Enter your company email address and click **Next**.

The screenshot shows the PJM Account Manager interface. At the top, there is a progress bar with seven steps: 1. Email, 2. Contact Information, 3. Main Account, 4. Subaccounts, 5. Main Account Access, 6. Subaccount Access, and 7. Review. Step 1 is currently active. Below the progress bar, there is a heading "Email Verification" and a text input field labeled "Enter your company email address *". The input field is highlighted with a dashed orange border. Above the input field, there is a link "Register for a system account".

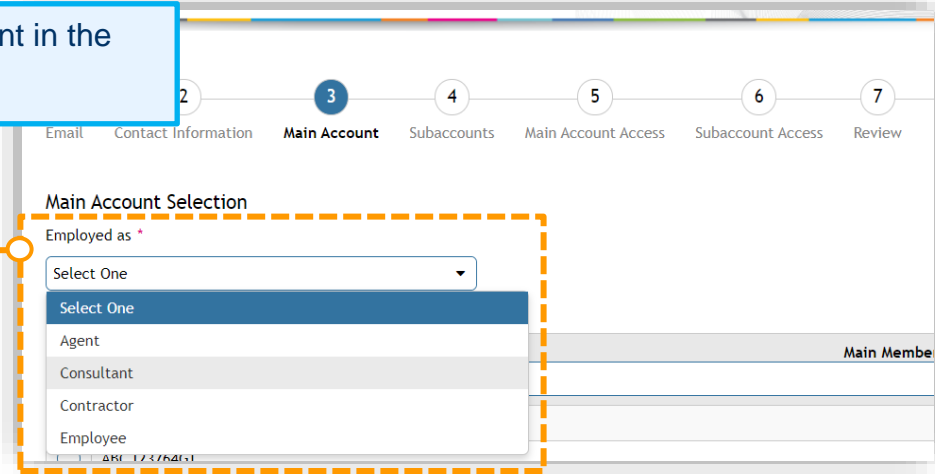
Single User Multi-Account (SUMA)

3. Fill in:

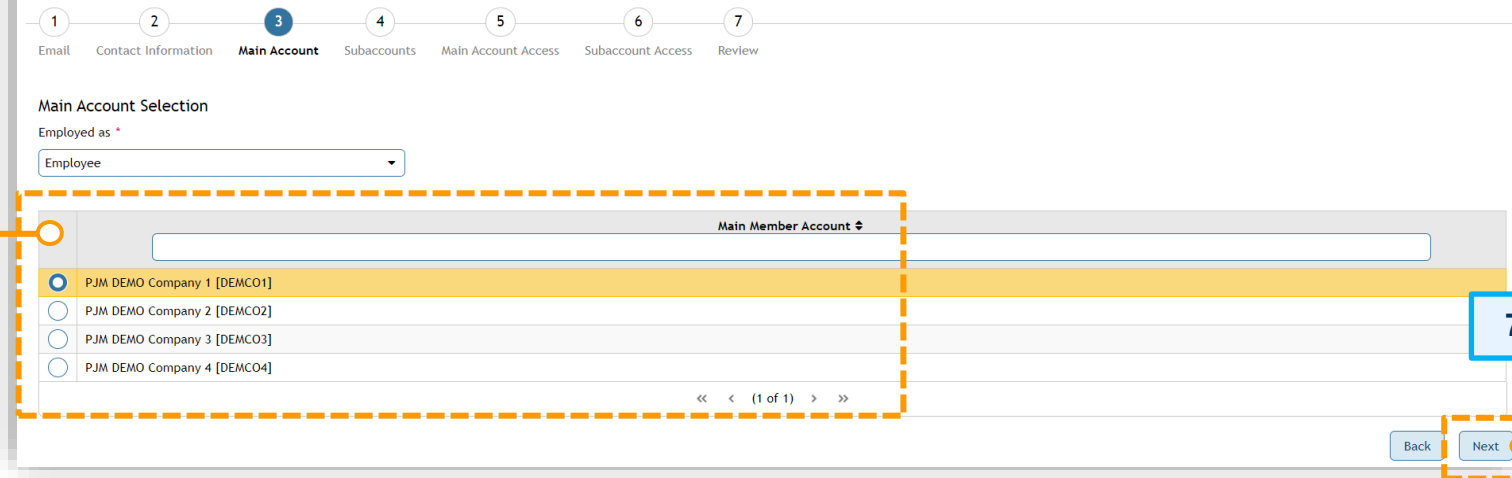
- A. Sign In Information
- B. Contact Information
- C. Security Questions

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5. Select your relationship to the main account in the **Employed as** field.



6. Select the main account.



7. Click **Next**.

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8. On the *Subaccount(s) Selection* screen, you can select one, multiple or all subaccounts, and then click **Next**.

Subaccount(s) Selection

Select the subaccounts you would like associated with your main member account below.

Subaccounts

PJM DEMO Company 1 (SUB 1) [DMCOS1]

« < (1 of 1) > »

Back Next

Subaccount(s) must be allowlisted to appear on the *Subaccount(s) Selection* list.

1 2 3 4 5 6 7
Email Contact Information Main Account Subaccounts Main Account Access Subaccount Access Review

Request Access for Main Company Account
Select the tools below for which you will need access to.

Access

Markets Gateway Generator Read Write
Markets Gateway Load Read Only
Markets Gateway Load Read Write
Planning Center Gen Model Read Only
Planning Center Gen Model Read Write
Planning Center Queue Point Read Only
Planning Center Queue Point Read Write
Power Meter Read Only
Power Meter Read/Write
Resource Tracker Read Only

Selected Access

Voting Read/Write
eCredit Read/Write
eCredit Read Only
eCredit R/W with Collateral
MSRS Read Only
PJM Public
Member Community Public

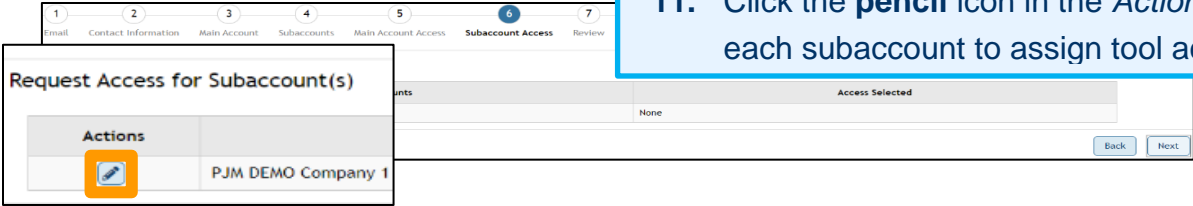
Comments

Back Next

9. Assign tool access for the main account by selecting the tool name under *Access*, then click the center **single-arrow** icon to add it to the *Selected Access*. Click **Next** to continue.

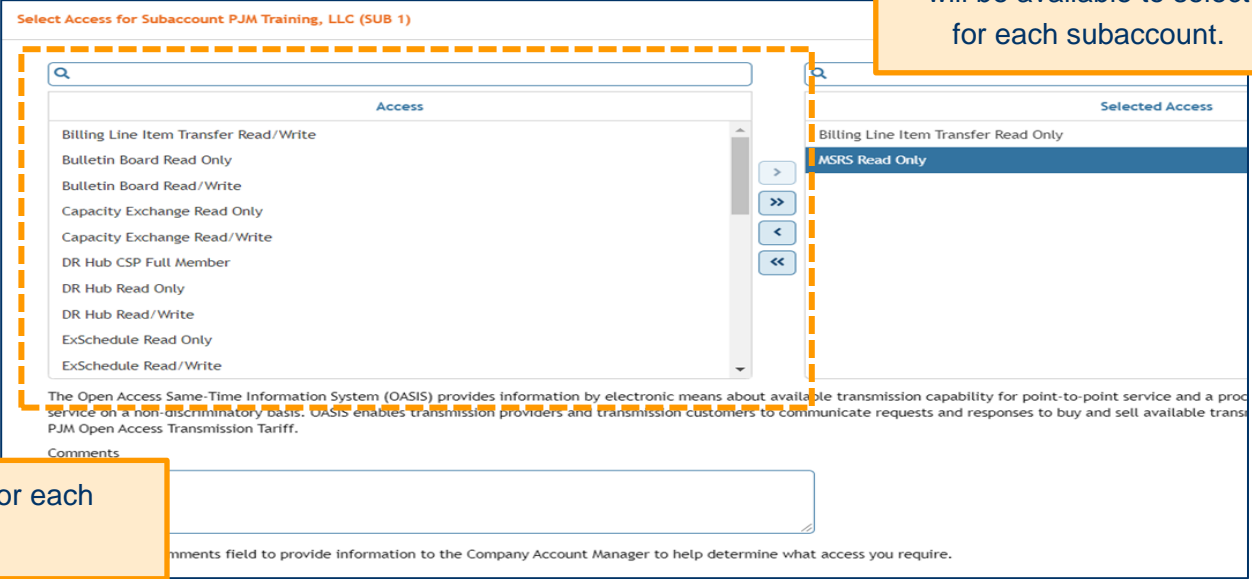
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11. Click the **pencil** icon in the *Actions* column for each subaccount to assign tool access.



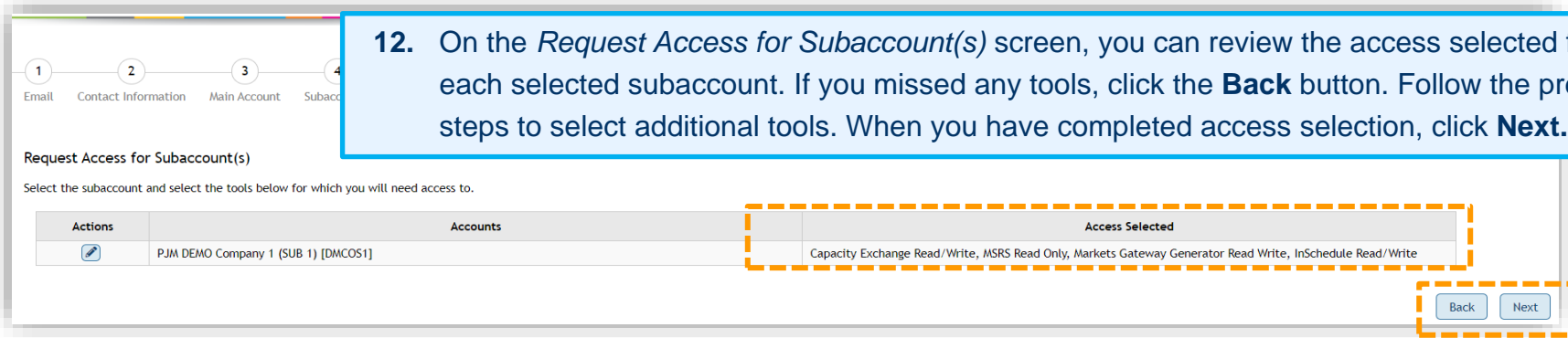
Only SUMA enabled tools will be available to select for each subaccount.

10. Assign tool access for the subaccount by selecting the tool name under *Access*, then click the center **single-arrow** icon to add it to the *Selected Access*. Click **Submit** to continue.



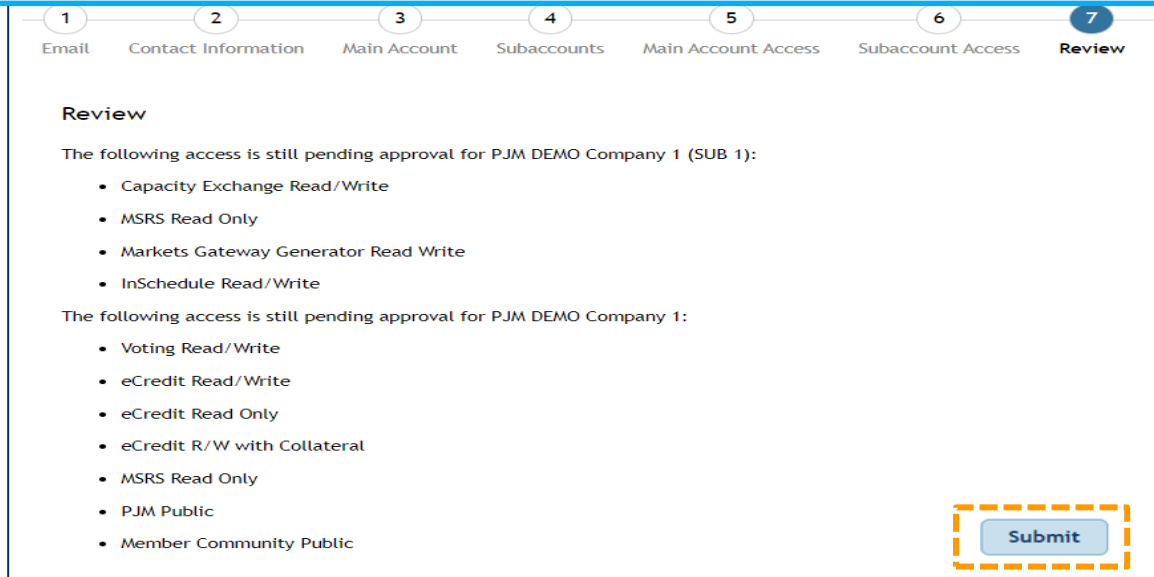
Repeat **Steps 10** and **11** to add access for each additional subaccount.

12. On the *Request Access for Subaccount(s)* screen, you can review the access selected for each selected subaccount. If you missed any tools, click the **Back** button. Follow the previous steps to select additional tools. When you have completed access selection, click **Next**.

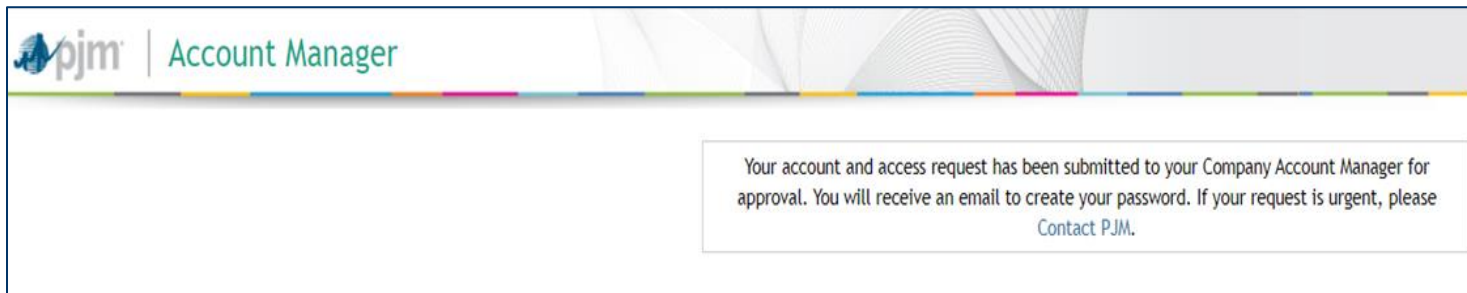


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13. On the *Review* screen, review all company account assignments and accesses being granted to the new SUMA user account, and then click **Submit** to finalize this request.



Next, you will receive the following screen, and an automated email with a link to set up your password. **Please note that this link expires four hours after issuance.** If the link expires, your company CAM administrator will need to issue you a password reset.



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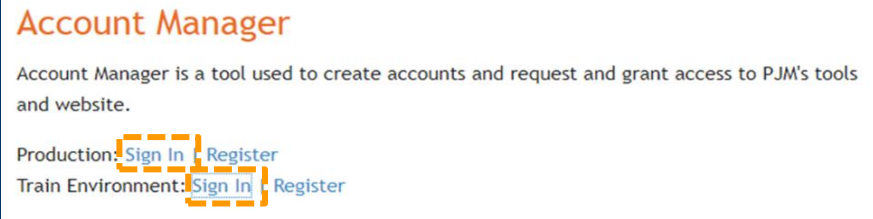
Convert an Existing User Account to a SUMA User Account

An existing user who has more than one user account may merge all of those user accounts and SUMA enabled tool access into a Single User Multi-Account. This will allow the user to only manage one account. To perform this, the user will select a user account that will be their primary account, and additional user accounts will become their secondary accounts. Only the primary account will be given the default tools access.

If you have an existing SUMA CAM user account, you don't need to make any changes. However, you will now be able to add SUMA enabled tools to the secondary accounts.

Note to CAMs: Member CAMs who are CAMs to multiple accounts and want to link them under a single user account should contact their authorized individual (authorized representative, maintenance manager or officer) from their company to submit this request via the [Membership Management Community](#) under [Maintenance](#) on your behalf.

1. Click **Sign In** for the appropriate environment in which your user accounts need to be converted to a SUMA user account.

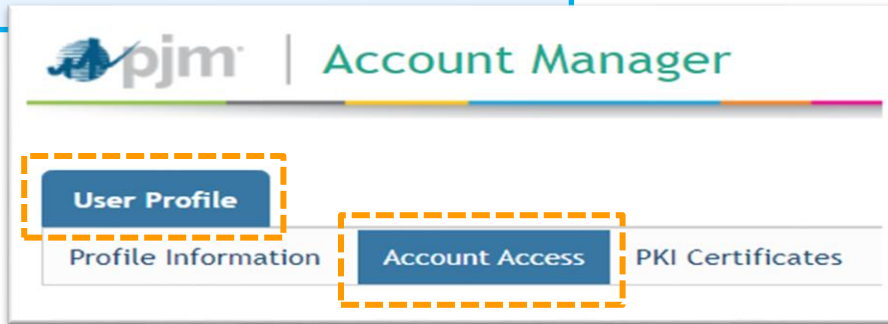


2. Sign in with your main (primary) company account credentials, then click **Log in**.

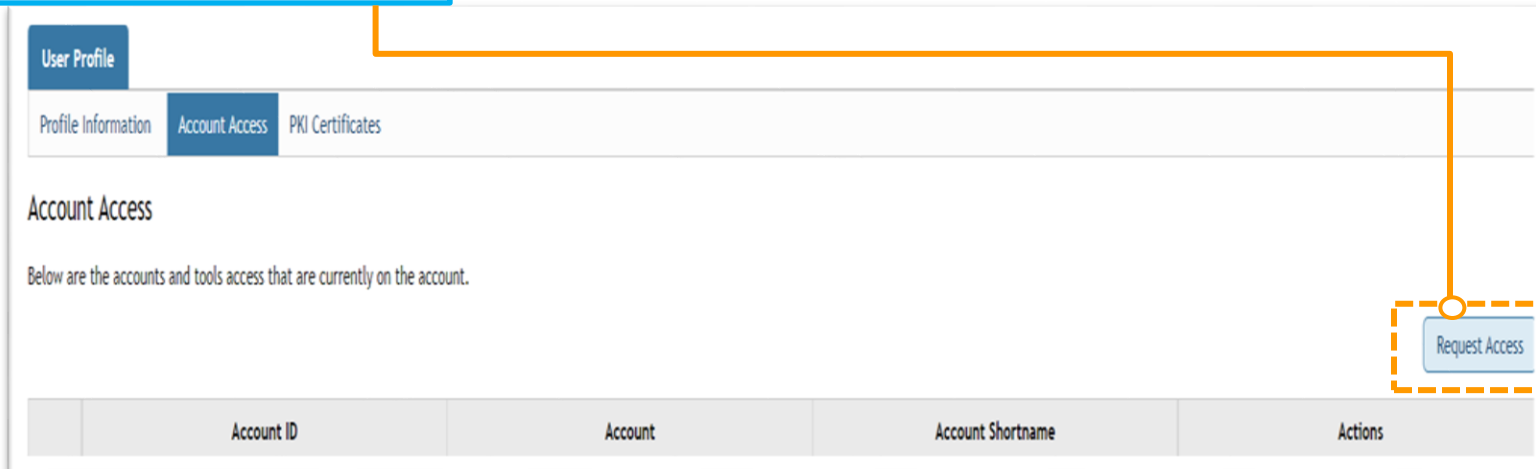


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3. Click **User Profile** then **Account Access**.

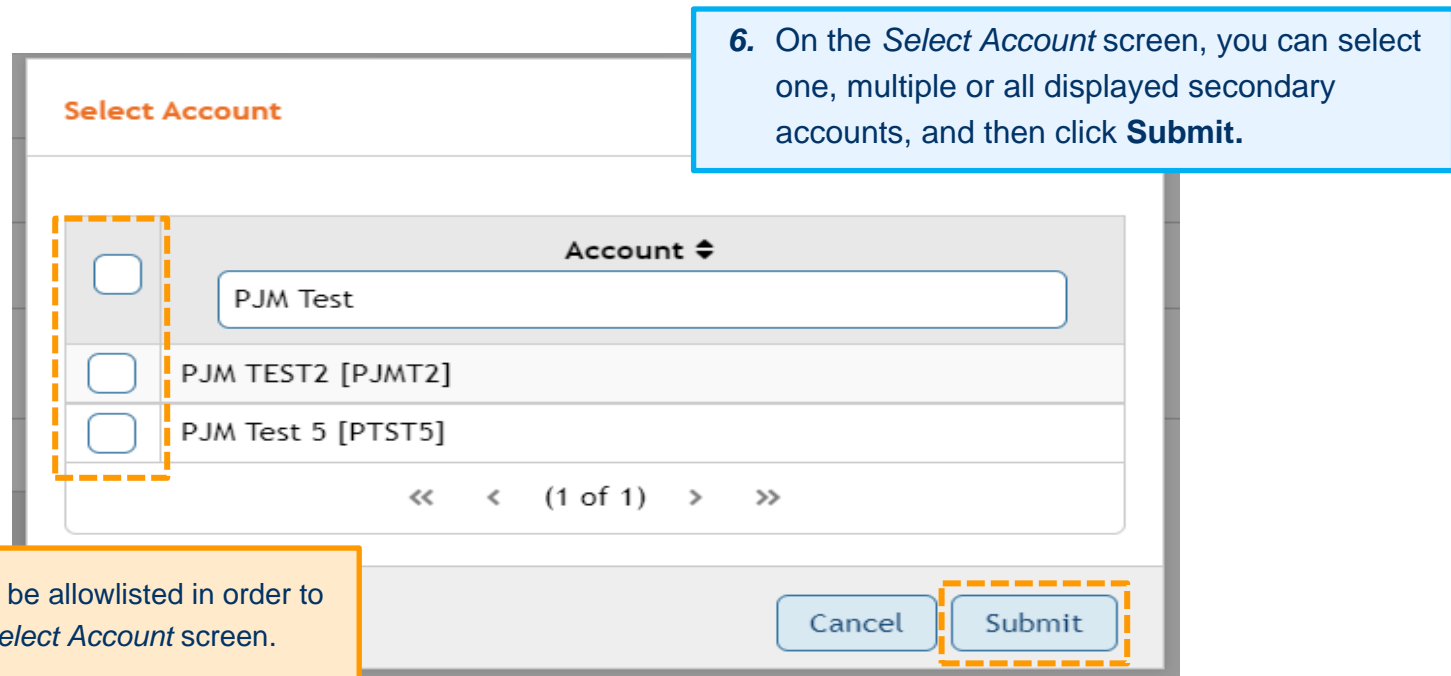
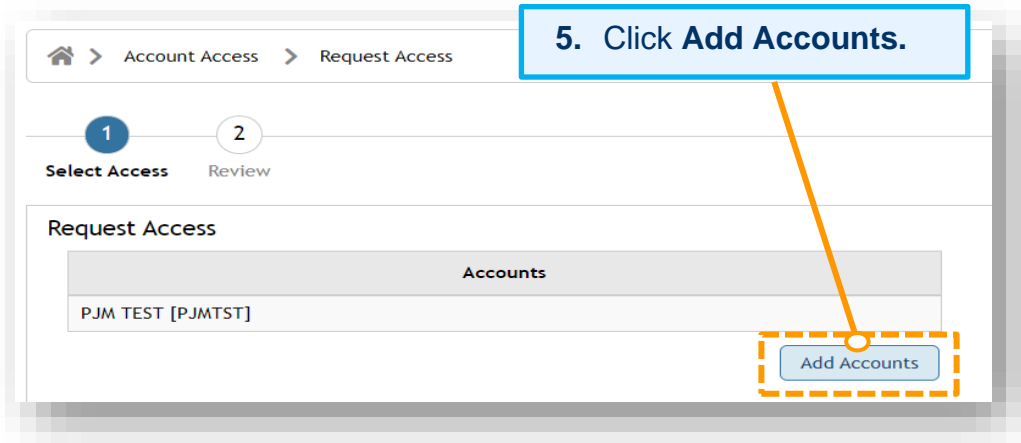


4. Click **Request Access**.



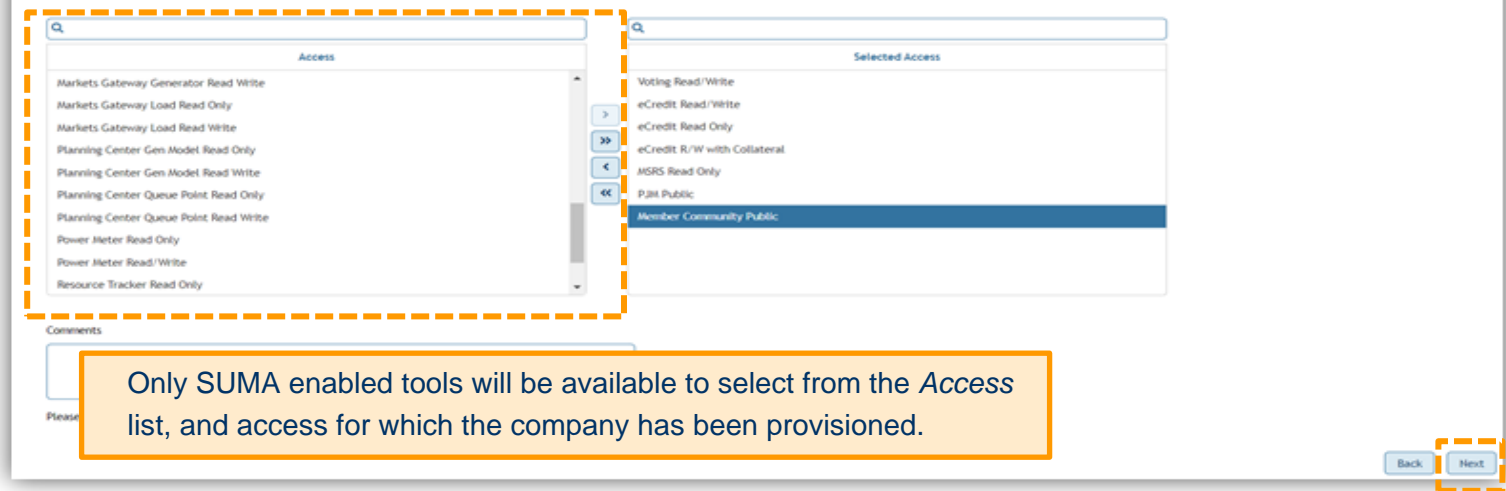
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Request Access Screen

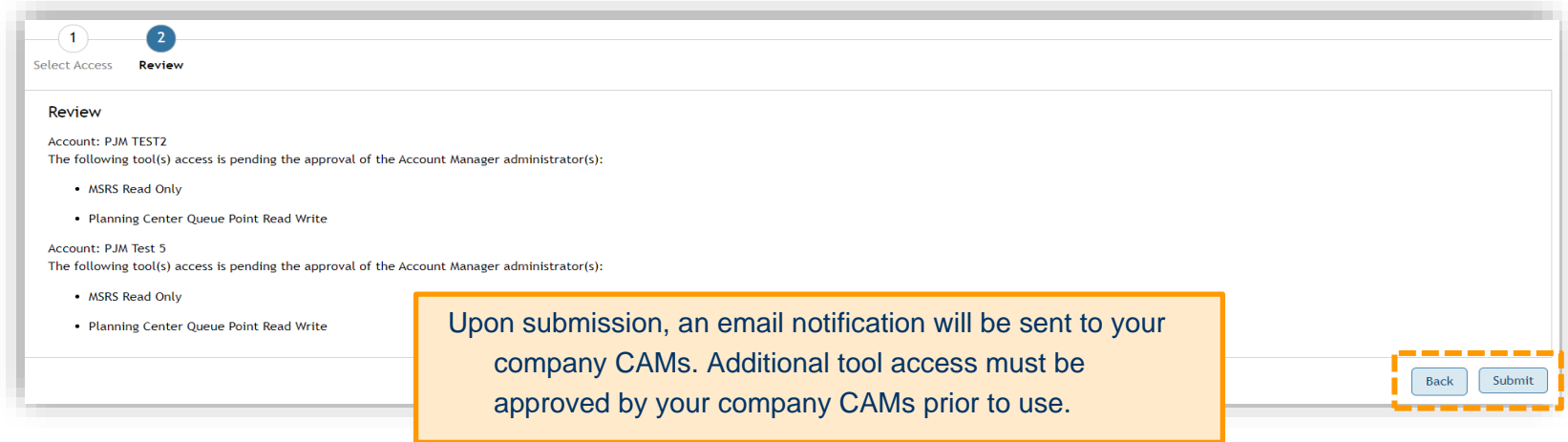


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7. Select tool access for the accounts by clicking the tool name under *Access* then clicking the center **single-arrow** icon to add *Selected Access*. Click **Next** to proceed.



On the *Review* screen, review all company accounts and accesses being granted for this new SUMA user account. If additional access is required, click the **Back** button, and then follow the previous step to select additional tool access. Click **Submit** to finalize this request.



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Accessing PJM Tools as a SUMA User

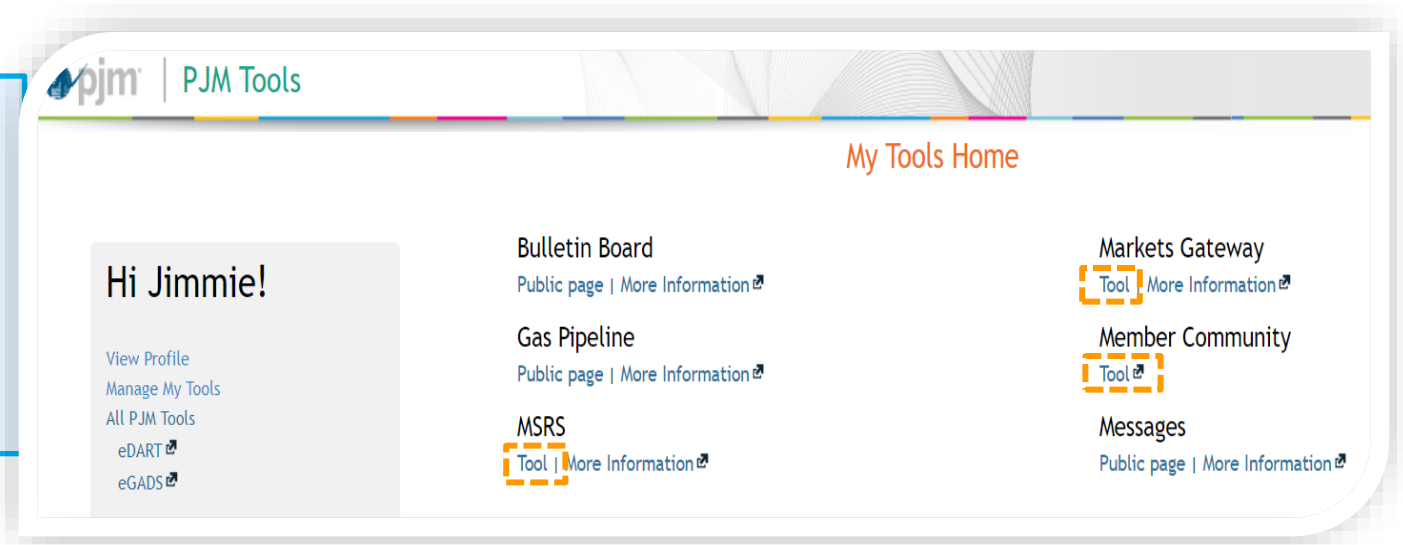
Users may access all their company accounts and tools associated with their SUMA user account from a single login. To access all the tools as a SUMA user follow the below steps:

1. Open web browser and navigate to the Tools home page – <https://tools.pjm.com/>

2. Enter SUMA user account credentials on the Single Sign-On page. Click **Log in**.

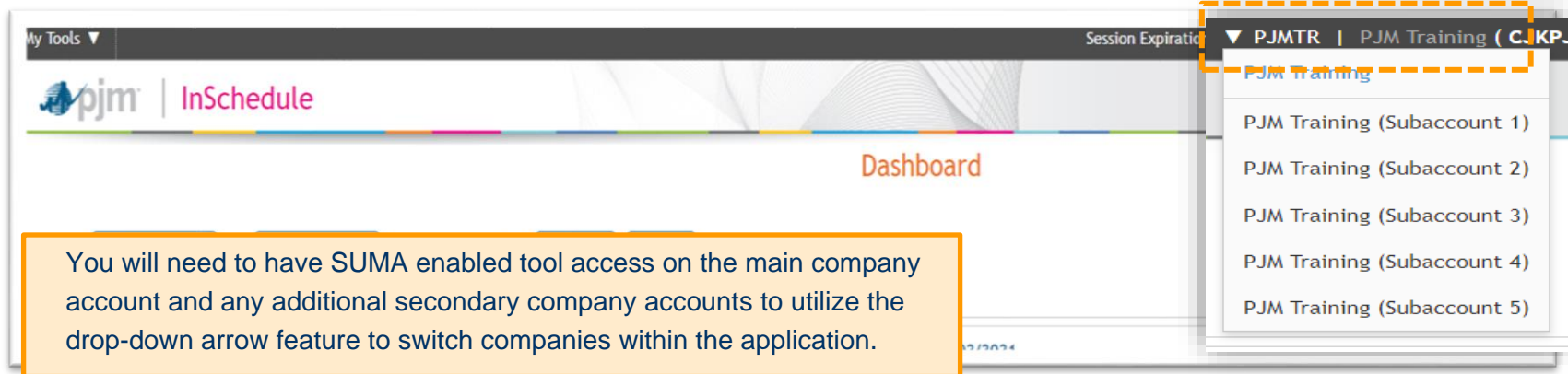


3. The PJM **My Tools Home** page displays combined accesses for the user's primary and all secondary accounts. Select a **Tool** link to launch an application.



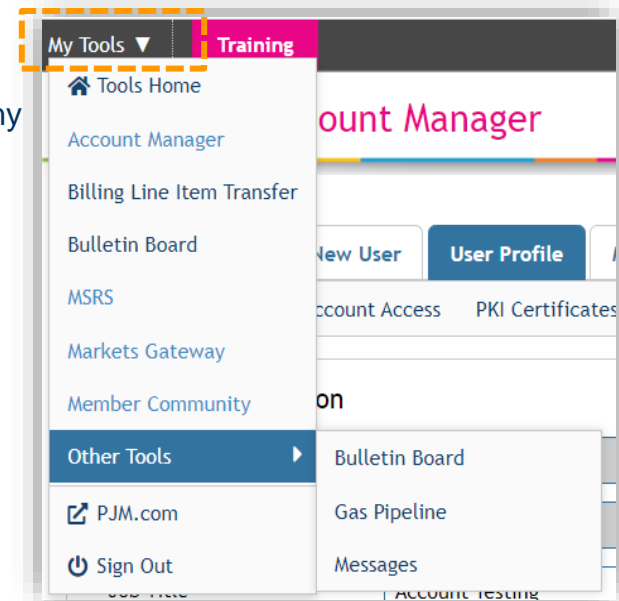
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Once the selected application has launched, in the upper right-hand corner of the page, you will see the default main company account shortname and longname. To switch company accounts, click the drop-down menu arrow before the account shortname, then select a secondary company from the drop down list.



You can also click the **My Tools** drop-down menu on the left-hand side of any application to switch to another application.

- The tools on the primary accounts are displayed in blue.
- The tools on the secondary accounts are displayed in black.
- The tools that are on both primary and secondary accounts are displayed under *Tools Home* in blue. Public tools (Bulletin Board, Data Miner, Gas Pipe, Messages) are displayed under *Other Tools* – in blue if the user has access to it, black if it is a default access.



Accessing PJM Tools Through Command Line Interface (CLI) as a SUMA User

PJM allows users to transfer XML-formatted files to and from the system through a browserless Java-based application called the PJM Command Line Interface (CLI). File transfers must be formatted according to the requirements in the PJM Command Line Interface (CLI) document.

SYSTEM REQUIREMENTS CHANGE FOR SUMA

- Must use CLI version 1.3.0 or higher – <https://pjm.com/-/media/etools/pjm-command-line-interface-java-8.ashx>

SETENV FILE CHANGE

REM (Optional) if you are a SUMA user and have multiple accounts set the specific set ACCOUNT=-h Suma-Account=BC REM e.g. set ACCOUNT=-h Suma-Account=BC

- Providing the correct account information in the setenv file (set ACCOUNT=-h Suma-Account=) will allow the user to upload/download information for the account.
- Account information left blank in the setenv file (set ACCOUNT=-h Suma-Account=) will allow the user to upload/download information for the primary account. If the primary does not have access, it will upload/download from any of the secondary accounts.
- Account information REMed in the setenv file (REM set ACCOUNT=-h Suma-Account=) will allow the user to upload/download information for the primary account. If the primary does not have access, it will upload/download from any of the secondary accounts.

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- Account information removed from the setenv file will allow the user to upload/download information for the primary account. If the primary does not have access, it will upload/download from any of the secondary accounts.
- Incorrect account information in the setenv file will throw an error for the upload/download. Correct account information in the setenv file but that particular company does not have access to the application for upload/download will throw an error.