MarkeTrak Administration

User profiles in MarkeTrak are managed by individuals who have been designated as MarkeTrak administrators for their organization. This tutorial will review how MarkeTrak administrators use workflows in the MarkeTrak tool to add, update and delete users for their company. We will also review reporting available for the admin workflows.

MarkeTrak Administrator Set-up

Let’s begin by reviewing the process for establishing a MarkeTrak Administrator for your company. MarkeTrak Administrator set-up in the MarkeTrak tool is an ERCOT function. A Market Participant can have a primary and a secondary backup Administrator. Market Participants wishing to add, change, or delete an Administrator must submit a MarkeTrak Administrator Form to ERCOT which is located on the MarkeTrak Information page. Once the MarkeTrak Administrator set-up has been completed by ERCOT, the Administrator has access to the MarkeTrak Admin workflows and they are responsible for user profile management for their company.

MarkeTrak Admin workflows

The MarkeTrak Admin workflows are only visible to users designated as Admins. These workflows are accessed by selecting the MarkeTrak Admin tab at the top left of the MarkeTrak screen. As you can see, the GUI layout of the MarkeTrak Admin is identical to the main MarkeTrak tab. The difference is in the subtypes available under the Submit tree. In the MarkeTrak Admin, the submit tree contains three workflows; Add User, Delete User, and Update User. We’ll begin our review with the process for adding a new user to MarkeTrak.

Add User

To add a new user to Marketrak, the Administrator must have the user’s Employee ID. The Employee ID can be found on the user’s Digital Certificate by following these steps. This must be done on the user’s computer where the Digital Certificate is loaded.

* Open Internet Explorer
* On the taskbar, click Tools
* Select Internet Options
* In the new window, Select the ‘Content’ tab
* Select Certificates, the certificate window will show all the digital certificates installed on that computer
* Highlight the digital certificate, then click View
* Click the ‘Detail’ tab within the next window
* In the window, highlight the ‘Subject’ line
* All details, such as the Employee ID are located here

In addition to the Employee ID, the Administrator will need the following information to create the new user’s profile:

* First Name (Required)
* Middle Name (Optional)
* Last Name (Required)
* Phone: (Required)
* E-mail: (Required)

To add a new user to MarkeTrak, the Administrator selects ‘Add User’ from the submit tree. The Administrator enters the required information. The DUNS number for the Administrator’s company will be populated by default. User type is also populated by default to Regular. The Administrator selects OK and a series of validations are performed which are as follows:

* The Employee ID field is validated for alpha-numeric format. If this validation fails, the Administrator will receive an error message indicating “Employee IDs must be alpha-numeric”.
* The Employee ID field is also validated for duplications. Each Employee ID should be unique and no duplicates are allowed. If the Administrator has entered an Employee ID that already exists in MarkeTrak, they will receive an error indicating “1 user record(s) exist with login id ‘111111111$jdoe’. Please enter a different Employee ID to generate a unique Login ID”.
* A validation is performed on the email address to ensure it is formatted correctly. If the email address is not formatted correctly, the Administrator will receive an error message indicating “Email address must contain ‘@’ symbol”.
* The phone number is validated to ensure is has at least 10 digits. If the phone number does not have 10 digits, the Administrator will receive an error message indicating “Telephone number must have at least 10 digits”.

The Add User issue has now been created. To finish the Submit process, the Administrator must select the *Commit* button. Before executing *Commit*, the Administrator should review the information provided and, if it is determined that edits are needed, the Administrator can select the *Re-Select Parameters* button to return to the previous screen and make corrections. If no edits are required, the Administrator selects *Commit* to complete the Add User process.

Updating a User

The MarkeTrak Administrator can update a user’s profile at any time. For example, the user receives a new digital certificate and their Login ID needs to be updated to reflect a new Employee ID. To update a user, the Administrator would use the Update User workflow.

The Administrator selects ‘Update User’ from the Submit Tree in the MarkeTrak Admin tab. The DUNS number for the Administrator’s company is populated by default. The Administrator enters the name of the user to be updated in the Contact field or can select Find and review the list of all users in the company. Once the user name is populated in the Contact field, the Administrator selects the *OK* button.

The Update User issue has now been created. From this screen, the Administrator would either select *Edit* to make the necessary changes or choose *Select Different User* if the current user selected is incorrect. The Administrator selects *Edit*. The fields appearing in green can be edited. The Administrator makes the appropriate edits and selects the *OK* button. To finish the Update User request, the Administrator must select the *Commit* button. At this time, the Administrator can also select *Re-Edit User* if additional edits are necessary. The Administrator selects *Commit* and the issue updates to Closed.

Delete User

User access to MarkeTrak can be removed by the Administrator by use of the Delete User workflow. The Administrator would select ‘Delete User’ from the Submit Tree in the MarkeTrak Admin tab. The DUNS number for the Administrator’s company is populated by default. The Administrator enters the name of the user to be removed in the Contact field or can select Find and review the list of all users in the company. Once the user name is populated in the Contact field, the Administrator hits the *OK* button.

The Delete User issue has now been created. The Administrator can now select a replacement for the user being deleted by clicking the *Select Replacement* button. Prior to selecting this transition, the Administrator can run a report to view all items owned by the user being deleted. A report is also available to view all rolodex entries that correspond to the deleted user. These reports can be accessed by selecting the links under the Description field.

The Administrator clicks the *Select Replacement* button. If there is a replacement user, select the Find button and choose a user from the list. *Select Replacement* is not a required field. If there is not a replacement user, the Administrator would simply leave the Replacement Contact field blank and click *OK*. For this tutorial, the Administrator selects a replacement user and clicks *OK*.

To finish the Delete User request, the Administrator must select the *Commit* button. At this time, the Administrator can also select *Re-Select Replacement* if necessary or the issue can still be withdrawn since the *Commit* transition has not been executed. The Administrator selects *Commit* and the issue updates to Closed.

Admin Reporting

MarkeTrak Administrators have the ability to report on the three Admin workflows. Let’s walk thru the creation of a report to view users that have been deleted from MarkeTrak calendar year to date.

The MarkeTrak Administrator selects the Reports tab from the navigation pane on the left side of the MarkeTrak Admin screen. Create Report under the Basic Tasks section is selected. Listing is the default value in the Type field which is the correct type for the report being created in this tutorial. The Administrator clicks the Next button.

Within the Report Project field, the Administrator selects the Delete User workflow. The Columns to Display section allows the Administrator to select the fields they want returned in the report. Item ID and Title are populated by default. The Administrator adds the following fields for display:

* Contact
* Submit Date

Next, the Administrator will select the report criteria. For this tutorial, the report criteria will be to return all issues submitted on after 01/01/2016. The Administrator expands the Search Filter section of the issue, clicks the Add button, and scrolls to the Submit Date field. To return issues submitted on or after 01/01/2016, the operator selected is >= to the field value of 01/01/2016. The Administrator selects *OK*. Once the report criteria has been selected, the Administrator clicks the *Preview* button at the top right of the screen and the report is displayed.