Title: MarkeTrak Administrator Functionality

A MarkeTrak Administrator is responsible for setup and managing their Company’s MarkeTrak user’s profiles and access. Each organization has at least one MarkeTrak Administrator. Please note, this role differs from the User Security Administrator (USA) for digital certificates.

MarkeTrak Administrator Set-up for new and existing MPs

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. Market Participants should designate a primary and a secondary backup Administrator and all designees must have an active ERCOT digital certificate. 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.[show screens to find this] Instructions for submission are specified on the form. Once the MarkeTrak administrator form has been submitted, ERCOT will validate and complete the request. Upon completion, the administrator(s) will have access to the MarkeTrak Administration workflows. [show screen shot]

MarkeTrak Admin workflows

 The MarkeTrak Admin workflows are only visible to users designated as Administrators. These workflows are accessed by selecting the MarkeTrak Admin tab at the top left of the MarkeTrak screen.[show screen] The GUI layout of the MarkeTrak Admin is very similar to the main MarkeTrak tab with the exception of the subtypes available under the Submit tree. The submit tree for the MarkeTrak Admin 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 user must have a digital certificate with the MarkeTrak role, as assigned by their USA. The MarkeTrak administrator will need the Employee ID associated with the user’s digital certificate. The Employee ID can be found installed by following these steps:

1. Open Internet Explorer
2. On the taskbar, click Tools
3. Select Internet Options
4. In the new window, Select the ‘Content’ tab
5. Select Certificates, the certificate window will show all the digital certificates installed on that computer
6. Highlight the digital certificate, then click View
7. Click the ‘Detail’ tab within the next window
8. In the window, highlight the ‘Subject’ line
9. All details, such as the Employee ID are located here photo shop sjones

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

* First Name (Required) sarah
* Middle Name (If present)
* Last Name (Required) jones
* Phone: (Required) (512) 555-5555
* E-mail: (Required) sjones@company.com

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:

* 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$sjones’. 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 and will be associated with the user in the MarkeTrak rolodex. 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. The Administrator should review the information provided and, if it is determined that edits are needed, choose 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. The DUNS number for the Administrator’s company is populated by default. The Administrator enters the name of the user [screen shot] to be updated in the Contact field or can select Find and review the list of all users in the company (select Mary Johnson). Once the user name is populated in the Contact field, the Administrator selects *OK*.

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 (change her employee id to maryj) and selects *OK* . To complete the Update User request, the Administrator must select *Commit* . 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 selects ‘Delete User’ from the Submit Tree. 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 selects Find and reviews the list of all users in the company (search for Wanda Smith). Once the user name is populated in the Contact field, the Administrator selects *OK*. A Delete User issue has now been created.

The Administrator can run a report to view all items owned by the deleted user to ensure all issues are transferred appropriately. (Clicking the first link will show one issue owned by Wanda. Clicking the second link will show Wanda as the primary escalation contact for the Customer Rescission subtype)

The Administrator can designate a replacement for the deleted user by clicking *Select Replacement.* Thiswill selectIf the Administrator designates a replacement user, they must choose a user from the list. For this tutorial, the Administrator selects a replacement user and selects *OK (select Sarah Jones)*. If necessary the Administrator may choose *Re-Select Replacement* , or the issue can be withdrawn.

To complete the Delete User request, select *Commit* and the issue will update 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 since 01/01/2016 .

The MarkeTrak Administrator selects the Reports tab from the navigation pane on the left side of the screen. Select Create Report under the Basic Tasks section. The type field defaults to ‘Listing’, which is the correct type for the report being created. The Administrator selects Next .

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. For this example, the Administrator adds the following fields for display:

* Contact
* Submit Date

Next, to select the report criteria to return all issues submitted on or after 01/01/2016, the Administrator expands the Search Filter section of the issue, selects Add, and navigates to the Submit Date field. The administrator s“>=” and enters “” to return all issues created on or after January 1, 2016{ Tammy and Matt to construct accurate narration for the rest } 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.

Rolodex Management

The MarkeTrak Administrator for each company is also responsible for managing the MarkeTrak Contact Rolodex, which is contained in the Manage Data section in MarkeTrak. Contacts are stored in the application by Contact Category with the following choice of designations:

* Primary
* Secondary
* Escalation Primary
* Escalation Secondary

Contact Categories are a subtype or a group of similar subtypes. The Contact Categories available in MarkeTrak are:

D2D – 997 Issues

D2D – Cancel w/Approval

D2D – Cancel w/out Approval

D2D – Customer Rescission

D2D – Inadvertent

D2D – Market Rule

D2D – Missing Enrollment TXNS

D2D – Other

D2D – Premise Type

D2D – Projects

D2D – Redirect Fees

D2D – Reject TXNs

D2D – Rep of Record

D2D – Safety Net

D2D – Service Address

D2D – Service Order – 650

D2D – Siebel CHG/Info

D2D – Switch Hold Removal

D2D – Usage/Billing Dispute

D2D – Usage/Billing Dispute LSE Interval Data

D2D – Usage/Billing Missing

D2D – Usage/Billing Missing LSE Interval Data

DEV – IDR & non IDR

DEV – LSE

DEV – Other

LPA - Other

When a company is initially set-up in MarkeTrak, the rolodex is populated by ERCOT. Once the rolodex has been created, the MarkeTrak administrator is responsible for maintaining the contact records going forward. It is important that the MarkeTrak administrator maintain up to date contact records. Individuals designated as contacts are the recipients of emails generated within the MarkeTrak application.

Earlier in the tutorial, the Delete workflow was used to remove Wanda Smith from MarkeTrak. Using the link to view all rolodex entries associated with Wanda Smith, we determined that she was the Primary Escalation contact for the Customer Rescission subtype. Since Wanda is no longer active in MarkeTrak, it is important that this contact record be updated with her replacement. Let’s walk thru the process of making this update to the rolodex. To begin, the administrator selects Search in the MarkeTrak navigation pane and then selects Manage Data. Under the Manage drop down field, the administrator selects MarkeTrak Contact List (Rolodex) and enters their duns number in the Company field. In the Contact Type field, the administrator would double click on D2D – Customer Rescission. The administrator would then scroll down to the Contact Level field and select Escalation Primary. With these selections made, the administrator scrolls back to the top of the MarkeTrak screen and clicks the Lookup button. The lookup results are displayed to the right and should show the existing Escalation Primary contact for the Customer Rescission subtype. To make a change to this contact, the administrator clicks the Update button. Under the Contact Details section, the administrator would replace Wanda’s information with Sarah’s contact information. Once the changes have been made, the administrator selects the Ok button and the changes are saved.