## MarkeTrak Users Guide

Section 7: Admin

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1. MarkeTrak Administrator’s Guide

MarkeTrak Participant Administrator Roles and Responsibilities

The MP Administrator will be responsible for establishing and maintaining the users associated with their Market Participant organization. This section of the MP User Guide will provide detailed instruction for adding, copying, editing and deleting users from the MarkeTrak system. MP Administrators will only be able to establish or maintain users associated with their organization.

The MP Administrator will be responsible for maintaining the MarkeTrak Rolodex. This is the list owned by each MP Administrator which determines the destination of Notification Emails. Please refer to Section 7 for detailed instructions.

The MP Administrator will be responsible for maintaining the MarkeTrak Contacts List. This is the list owned by each MP Administrator which provides contact information for each MarkeTrak user for that company. Please refer to Section 7.

The MP Administrator will also be responsible for Report Management. – creating reports for use by multiple users registered under the same DUNS.

**NOTE:**ERCOT must establish the MP Administrator account and the Rolodex contact affiliations for a particular MP organization before any of these instructions can be accomplished.

## Add a New User

The addition of a new user is a process by which the MP Administrator will establish a user profile based on the digital certificate, which provides the user contact information (“General” tab), assigns privileges (“Membership” tab), set display settings (“Preference” tab) associates the user to the MP company record.

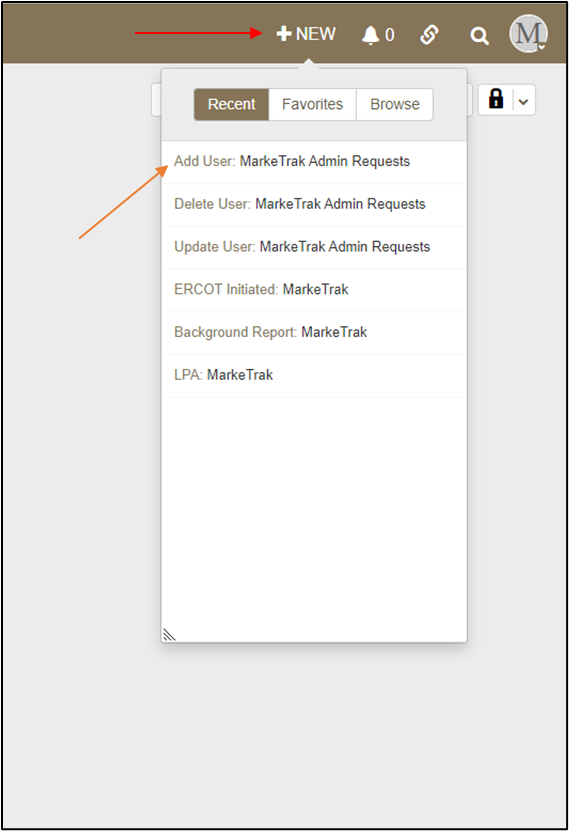
1. In order to add a user, the MP Administrator must have the user’s employee id. The Employee ID can be found on the user’s Digital Certificate by following these instructions. These instructions must be done on the user’s computer where the digital certificate is loaded.
   1. Open Internet Explorer.
   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
2. The MP Administrator logs into MarkeTrak and selects the MarkeTrak Admin tab (**Fig 7.1.1a**)

**Fig 7.1.1a**



1. In the new window, select the **Add User** link (**Fig 7.1.1b**)

**Fig 7.1.1b**

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1. On the User Administration: Add User screen, key in the user information requested. (**Fig 7.1.1c**)

**Login ID:** Employee ID (Required)

**Example:** JDoe0506

Please note employee id must match the digital certificate exactly.

Follow the process as outlined in step number 1 to find the user’s employee id.

**First Name:** (Required)

Middle Name: (Optional)

Last Name: (Required)

**Phone:** (Required)

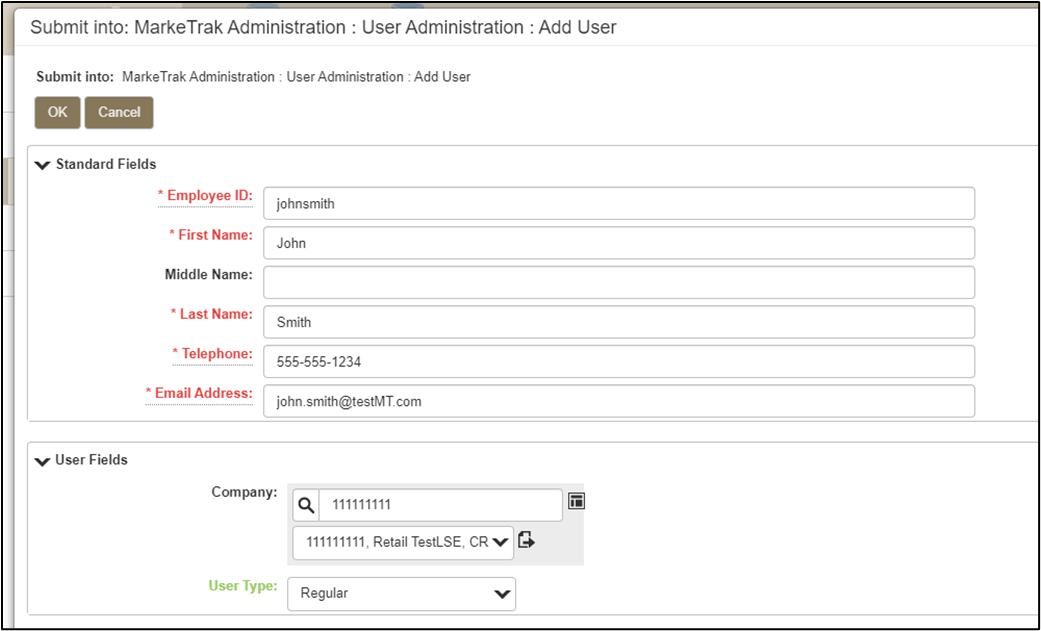
**E-mail:** (Required)

**Company**: Defaulted to your company Duns

**User Type:** Regular

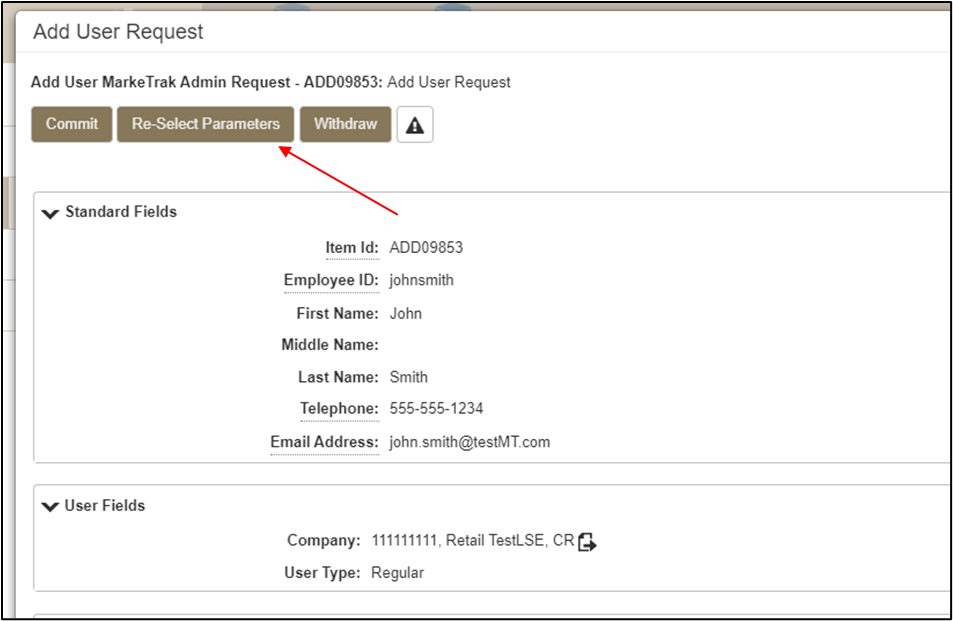
Select OK to continue

**Fig 7.1.1c**

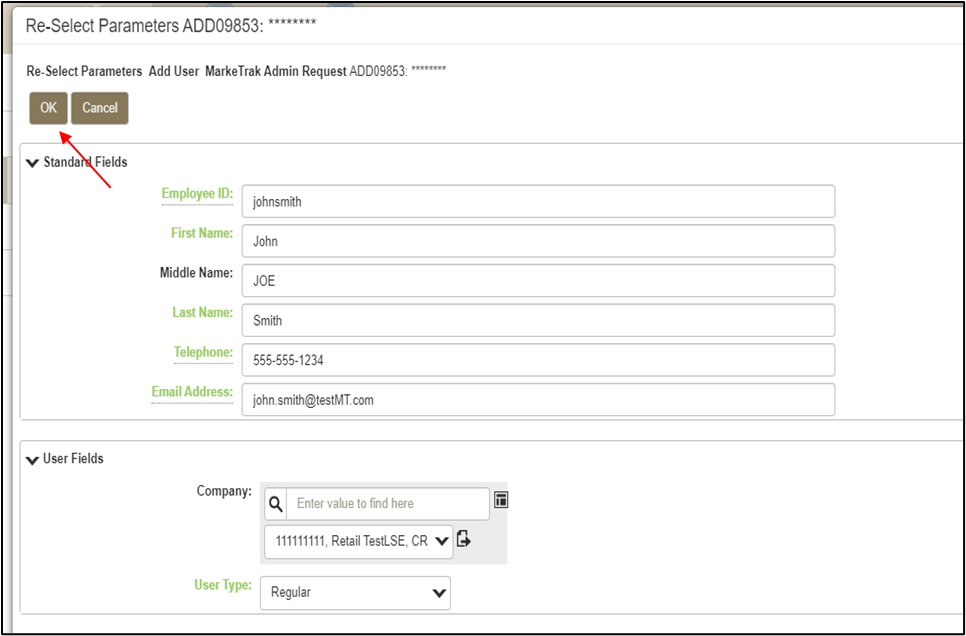
****

1. The User has been created. Review the information. If edits are needed select the ‘Re-Select Parameters’ button (Fig 7.1.1d). Once edits are made select OK (Fig 7.1.1e). Select ‘Withdraw’ to cancel the Add User Process.

**Fig 7.1.1d**

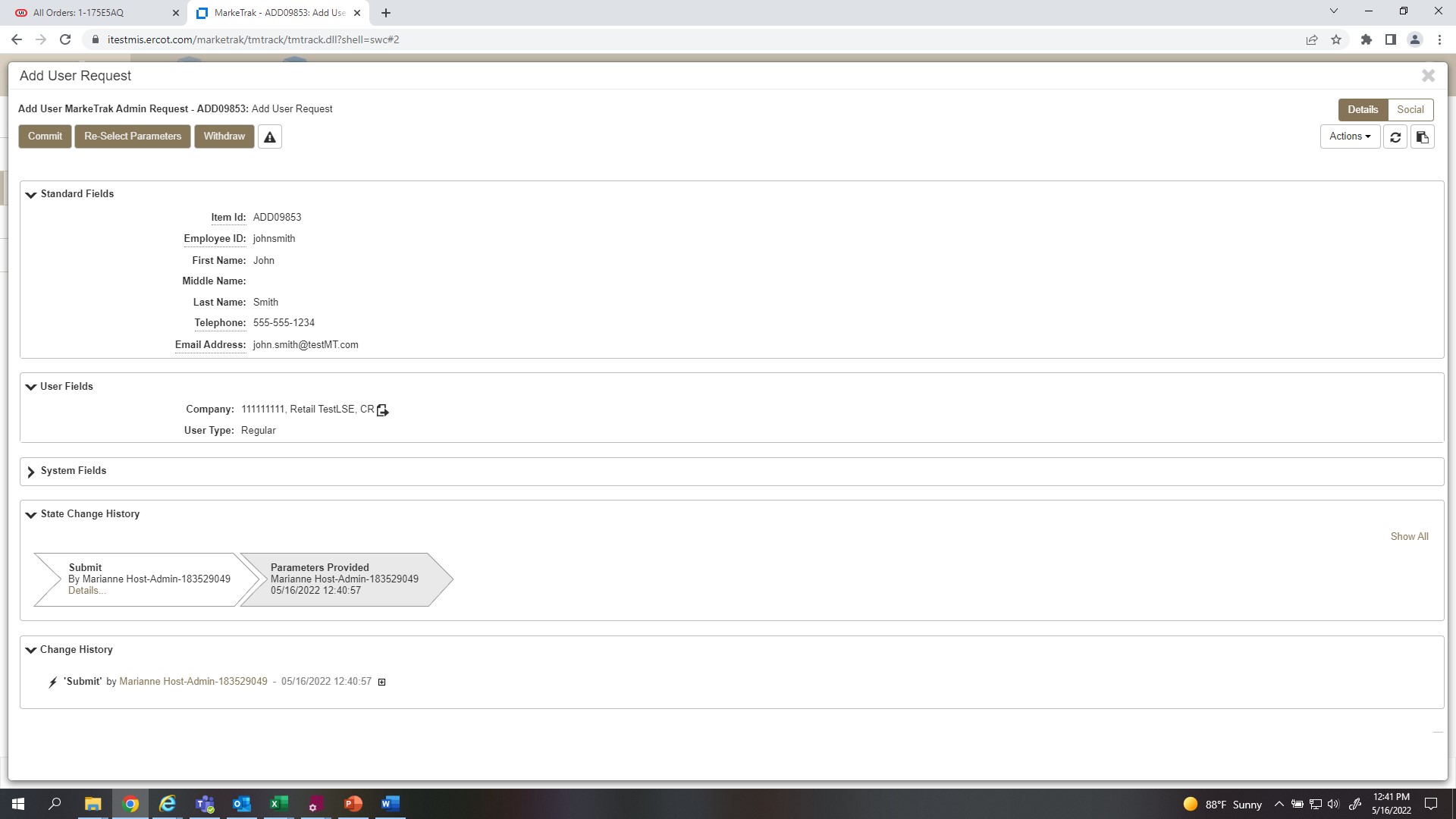


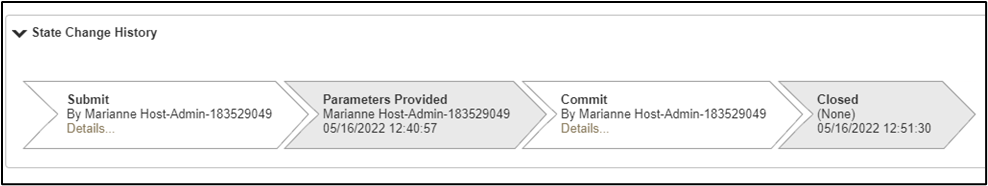
**Fig 7.1.1e**

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1. Select Commit to complete the Add User process. (**Fig 7.1.1f**) The issue auto closes.

**Fig 7.1.1f**





## Updating a User

The MarkeTrak Administrator may update a user’s profile at any time. For an example, the user receives a new digital certificate and their login ID needs to be updated to reflect the new employee id.

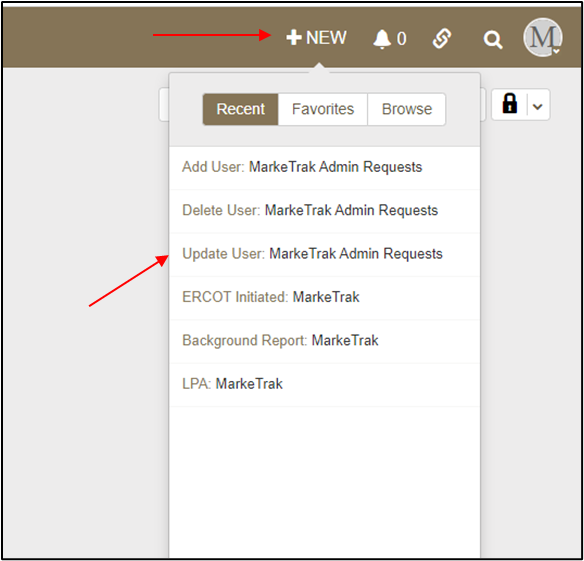
1. The MP Administrator logs into MarkeTrak and selects the MarkeTrak Admin tab (**Fig 7.1.2a**)

**Fig 7.1.2a**

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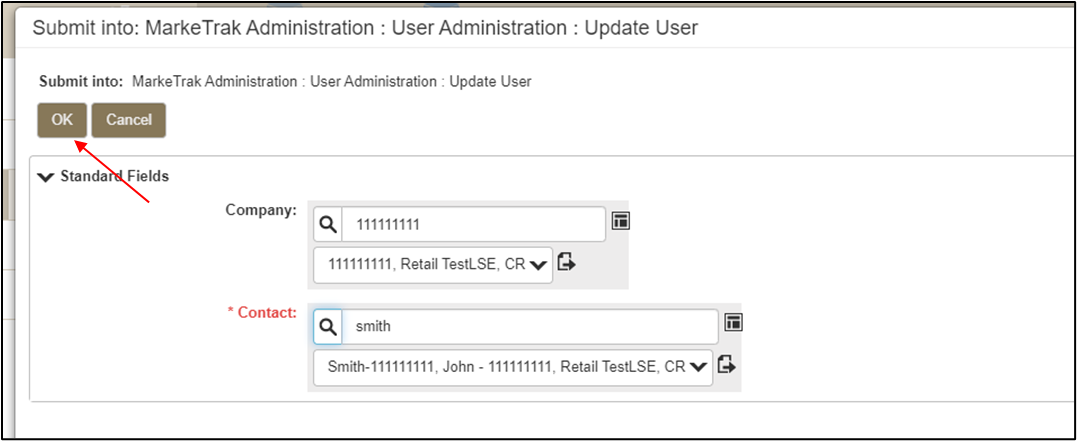
1. In the new window, select Update User (**Fig 7.1.2b**)

**Fig 7.1.2b**

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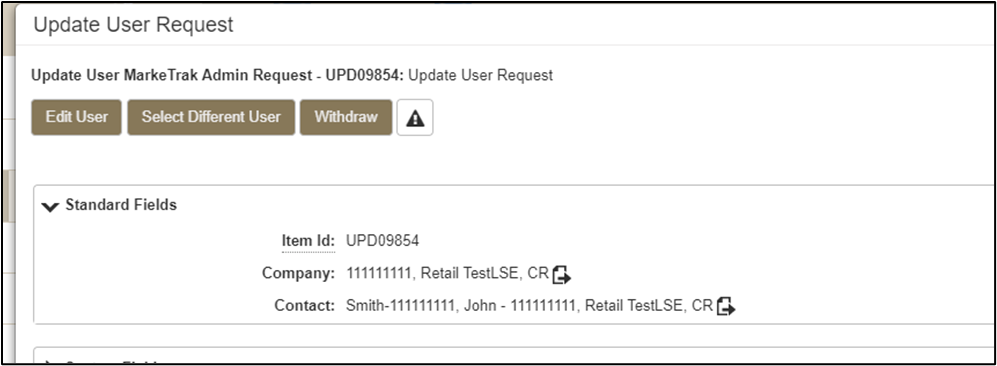
1. Search the user to be updated by entering your company DUNS and/or the person’s name. Select OK. **(Fig 7.1.2c)**

**Fig 7.1.2c**

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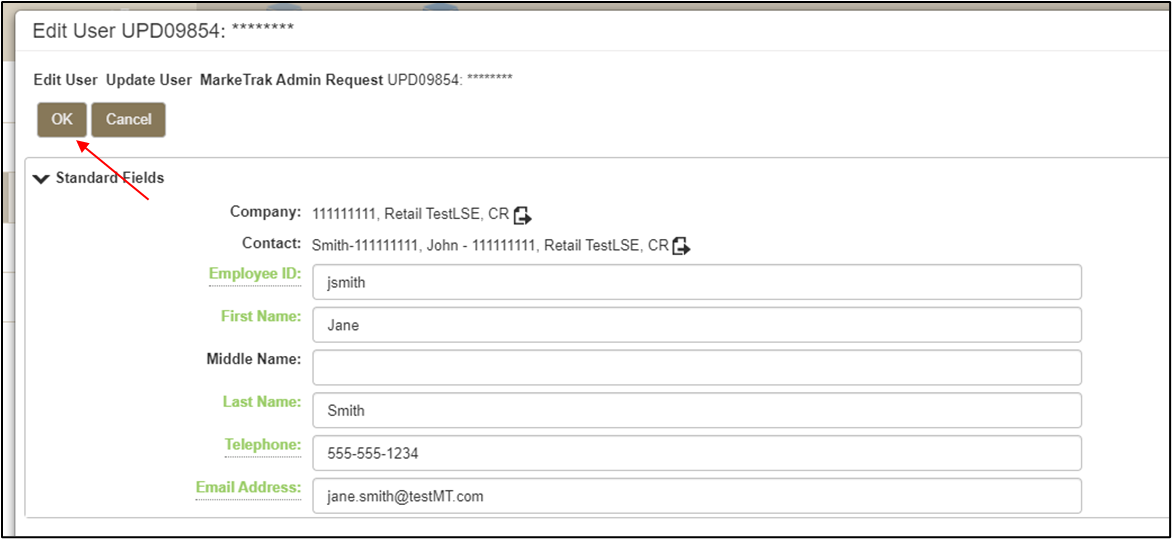
1. From this screen, the Admin can either select ‘Edit’ to makes changes or ‘Select Different User’ if needed. (**Fig 7.1.2d**)

**Fig 7.1.2d**

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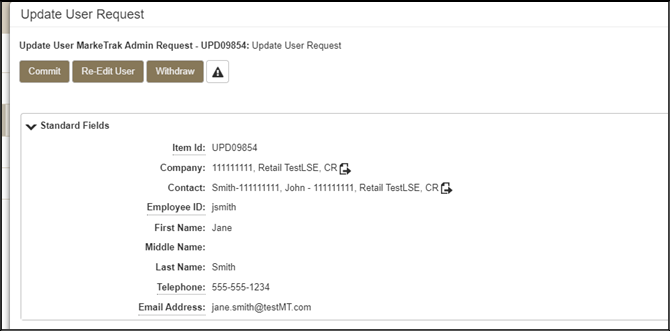
1. Once the update has been made, select **OK** to save the changes. **(Fig 7.1.2e)**

**Fig 7.1.2e**

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1. To complete the user edit select Commit. If additional edits are needed select Re-Edit User. **(Fig 7.1.2f)**

**Fig 7.1.2f**



## Delete User (Remove User Access)

The removal of an existing MarkeTrak user’s access is a process by which the MP Administrator will remove the user.

**NOTE:** Extreme caution should be used when executing this process. ERCOT assistance will be required if a mistake occurs.

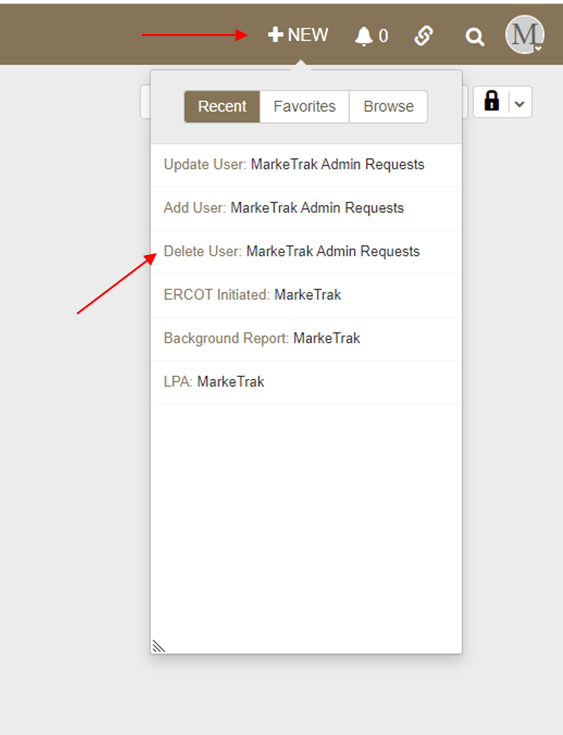
1. The MP Administrator logs into MarkeTrak and selects the MarkeTrak Admin tab (**Fig 7.1.3a**)

**Fig 7.1.3a**

1. Select Delete User. (**Fig 7.1.3a**)

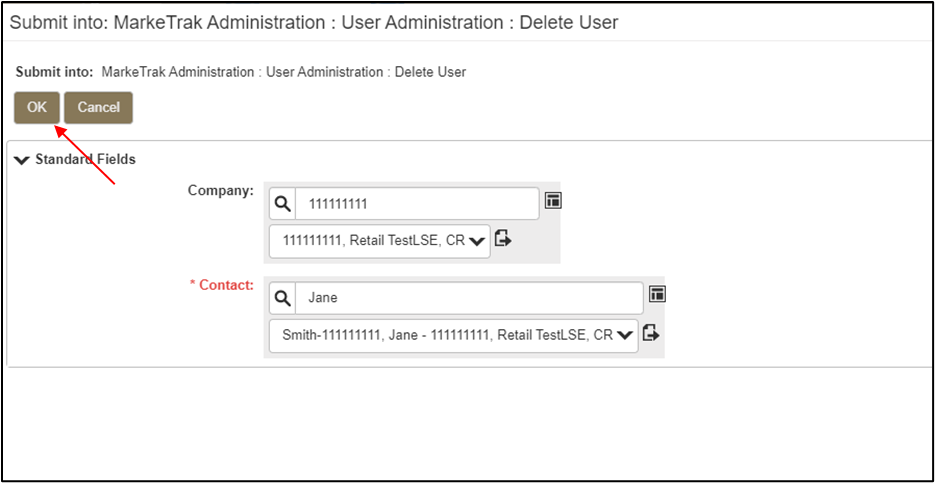
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**Fig 7.1.3b**

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1. Search for the User to be deleted and select OK. (**Fig 7.1.3c**)

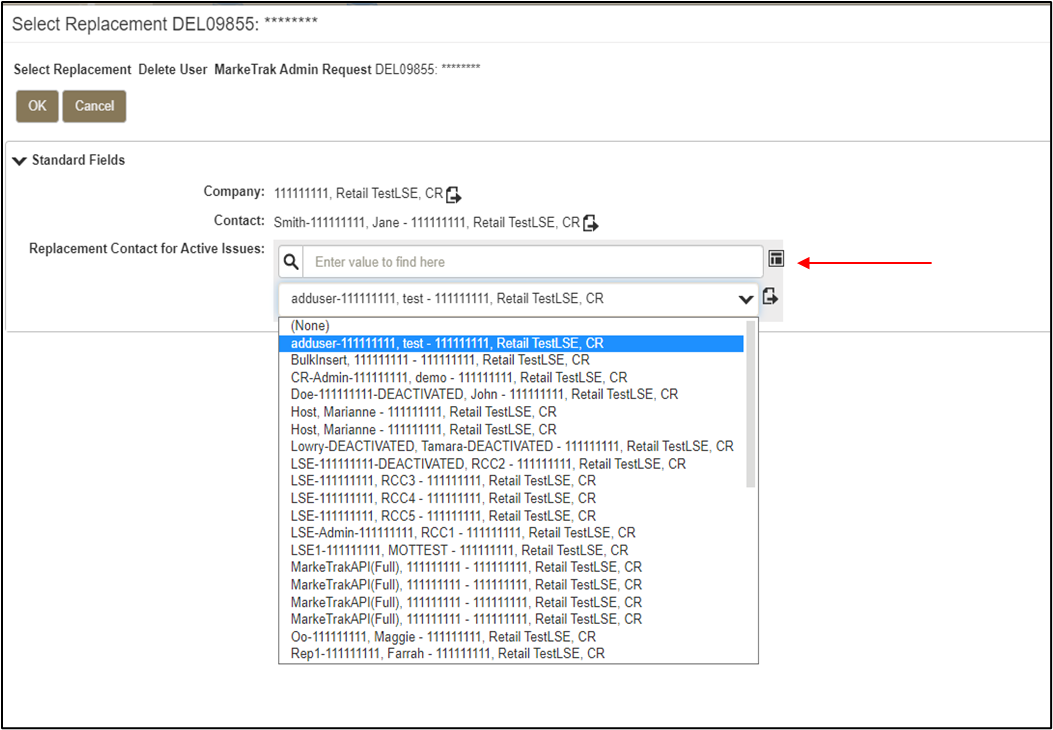
**Fig 7.1.3c**

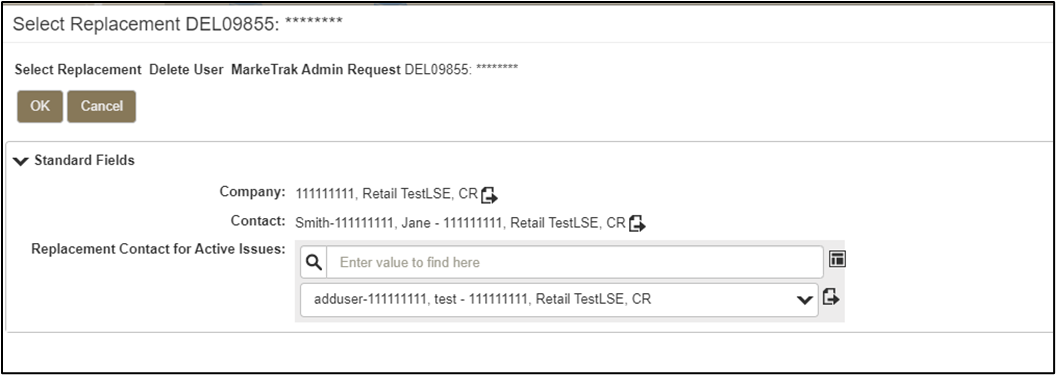
****

1. Delete user issue is created. To proceed choose Select Replacement. The Admin can select a replacement for the user that is being deleted. If there is no replacement, the value should remain (None). Select OK (**Fig 7.1.3d**)

**Fig 7.1.3d**

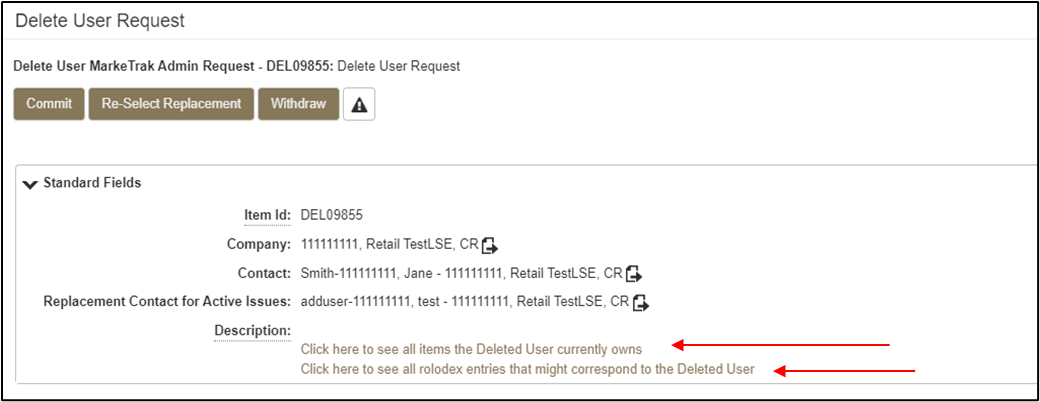


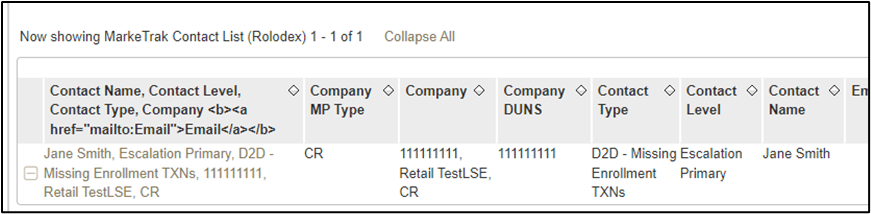


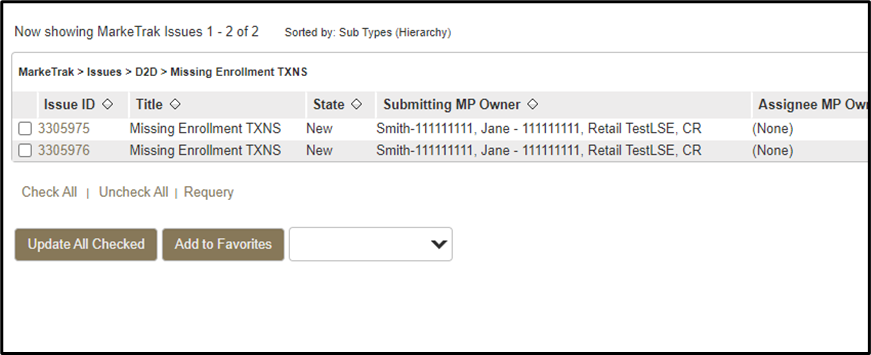


1. The workflow allows the Admin to view all items owned by the user that is being deleted. If a replacement for the user to be deleted is selected, the replacement will become the owner of all active issues owned by the user to be deleted. It also allows the Admin a means to identify all the rolodex entries corresponding to the deleted user. To view the issues or rolodex contacts, select the appropriate link. (**Fig 7.1.3e)**

**Fig 7.1.3e**

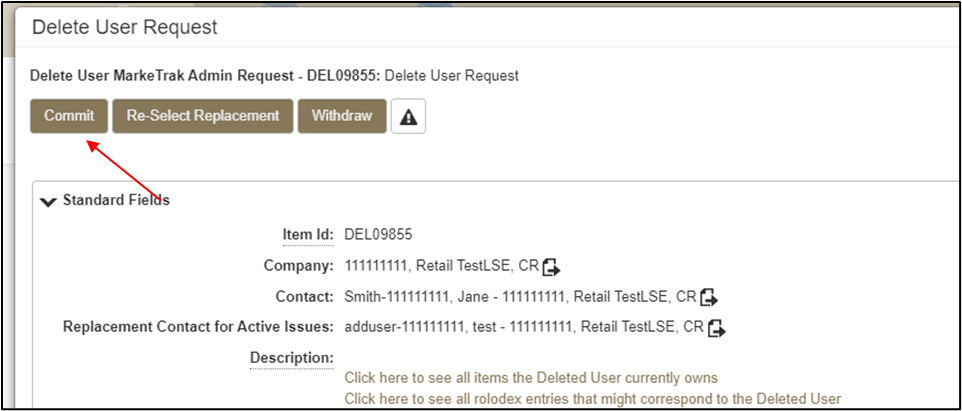


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1. Select Commit to complete the Delete User process. (**Fig 7.1.3f)**

**Fig 7.1.3f**



## 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. Please follow the steps outlined in Section 1.7 MarkeTrak Rolodex to manage the following contact types.

**Contact Category**

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

It is very important to keep these records up to date since these are the recipients of the automatic notification e-mails. The timelines for these emails are outlined in Section 1: General Section, Subsection 1.8.2

## Administrator Change

Each Market Participant can assign individuals to act as their primary and backup MarkeTrak Administrators. To change the MarkeTrak Administrators, please follow the steps below.

1. The Market Participant’s Primary Authorized Representative or Secondary Authorized Representative for your company will need to complete the ‘MarkeTrak Administrator Form’ (**Fig 7.1.5a**)

The ‘MarkeTrak Administrator Form’ can be found on the MarkeTrak Information Page

<http://www.ercot.com/services/client_svcs/mktrk_info/MarkeTrak_Administrator_Form.xls>

1. Please complete Tab 2 ‘Existing\_MP\_Administrator\_Form’ accordingly

**Company DUNS** – Only populate this field with **one** DUNS number

**Company Type** – From the drop down indicate if the Market Participant is a CR or a TDSP

**Existing MT Administrator(s) Section** – An Existing Market Participant must complete the Existing MT Administrator(s) section in order to add, change or delete a MarkeTrak Administrator. If the Market Participant has 2 MarkeTrak Administrators, please provide information on both Administrators.

**First Name** – Populate this field with the first name of the existing MarkeTrak Administrator

**Last Name** – Populate this field with the last name of the existing MarkeTrak Administrator

**Action** - From the drop down please indicate what action is needed on the Existing Administrator

**No Change**: no change will be made to this existing MarkeTrak Administrator.

**Remove Admin Rights and give User Rights**: the existing MarkeTrak Administrator access will be changed to User access.

**Deactivated – No User Access**: the existing MarkeTrak Administrator privileges will be deactivated.

**Change/New Digital Certificate – Employee ID**: the existing MarkeTrak Administrator’s employee id will be updated. Please provide the new id in the Employee ID field.

**Employee ID** – (\*Required if Action = Change/New Digital Certificate – Employee ID)

1. New MT Administrator(s) Section – A Market Participant can have 2 MarkeTrak Administrators - One primary and one backup.

**Employee First Name** – Populate this field with the first name of the employee

**Employee Last Name** - Populate this field with the last name of the employee

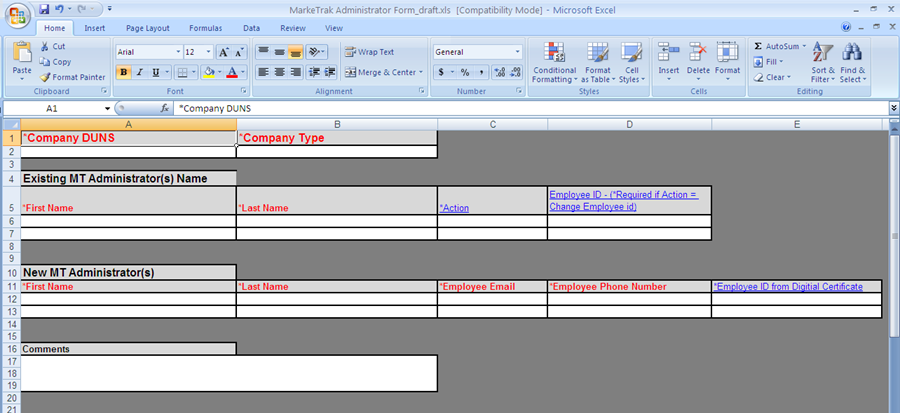
**Employee Email** – Populate this field with the employee’s work email address

**Employee Business Phone** – Populate this field with the employee’s business phone number.

**Employee ID from Digital Certificate** – This is a required field for the MarkeTrak Administrator.

**NOTE**: Employee ID field must be unique for the MarkeTrak Administrator. The Employee ID can be found on the Digital Certificate by following the steps out lined in Section 7.1.1

**Fig 7.1.5a**

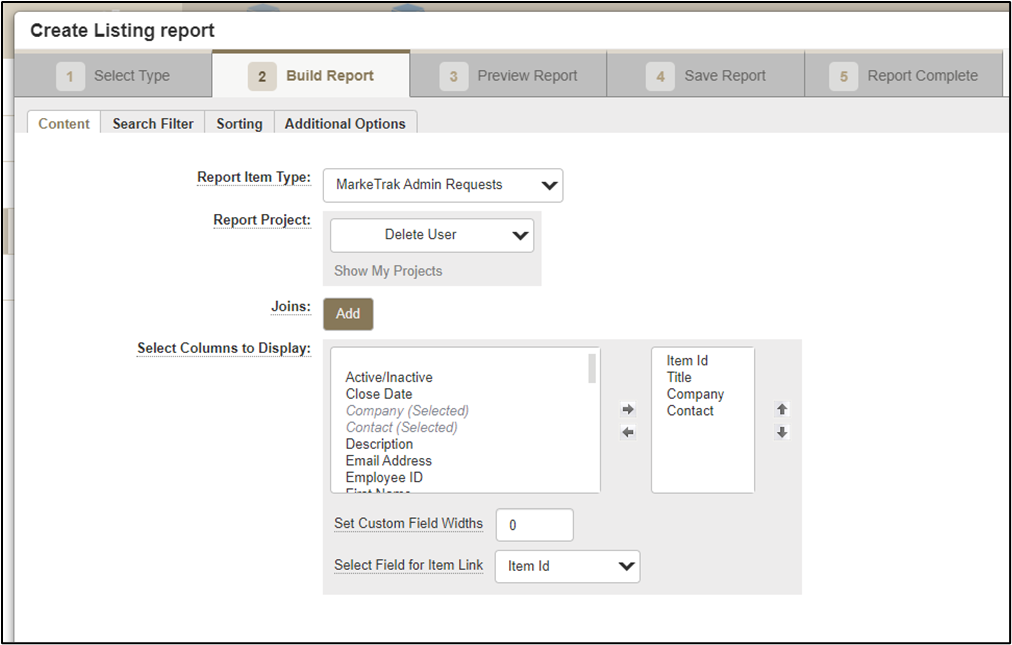


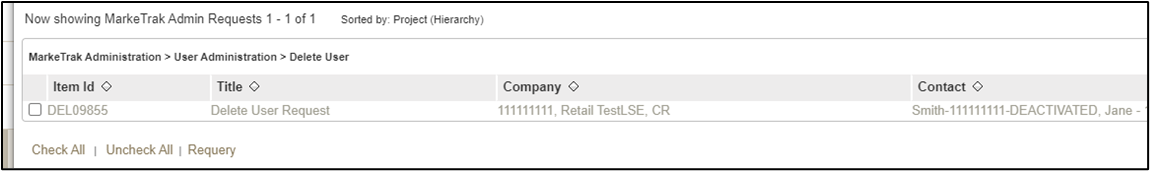
1. Send the completed ‘MarkeTrak Administrator Form’ to your Retail Account Manager at ERCOT.
2. ERCOT’s MarkeTrak Administrator will make the change based off the information given in the spreadsheet.
3. Your Retail Account Manager will notify the primary and/or secondary business contact when the change has been made.
4. The new MarkeTrak Administrator will have Administrator rights immediately following the change.

## Administrator Reporting Responsibilities

The MarkeTrak application contains a vast amount of reporting options. Many of the reports that a user will find useful have already been created and saved into the application. The user can also create and save ad hoc reports. The administrator has the ability to report the users added, deleted or updated. (**Fig 7.1.6a**)

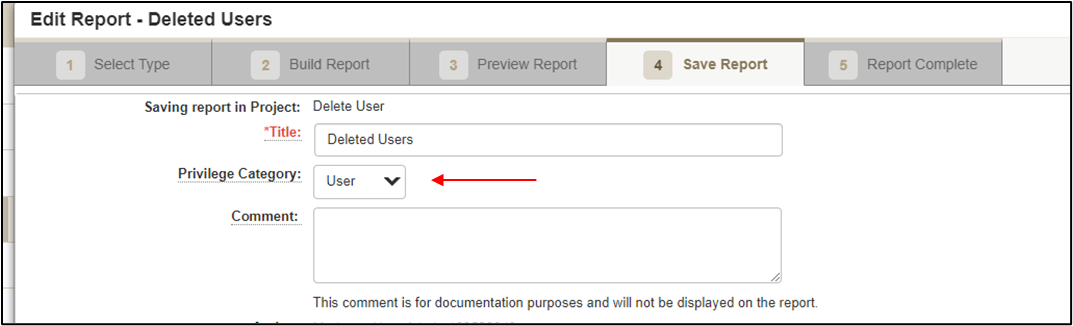
**Fig 7.1.6a**





The Company’s MarkeTrak Administrator can create ad hoc reports and allow all users within that company to access these reports by selecting ‘User’ under the Privilege Category or the Administrator has the option of making them private, so that they may be the only one allowed to view them. (**Fig 7.1.6b**)

**Fig 7.1.6b**



## Administrator Locks

Administrative locks block access to certain functions that are being performed by other administrators. For example, only one administrator can edit a specific user account at once.

If you attempt to edit a user account that is locked, you will receive a message stating who is editing the item, when the lock was acquired, and why access has been denied. Administrators should contact their ERCOT Account representative to request that an Administrative Lock be cleared.