

Annual User Certification Quick Guide



June 2021

TABLE OF CONTENTS

Overview	1
Email Notifications for Certification Window Opening and Closing	2
Getting Started	3
How to Certify Users and Accesses for Users and System Accounts	4
User Accounts Certification.....	5
SUMA CAMs.....	9
SUMA User Accounts	11
System Account User Certification	13

Annual User Certification Quick Guide

Overview

For security purposes, PJM now requires CAMs to perform an annual review of users and their authorized access to ensure that all user accounts in Account Manager have the appropriate access authorizations and to certify that the users who have access are authorized to do business on behalf of their listed organization. CAMs will have a 60-day window from start to close to certify their users and accesses.

Certify All User Relationships to the Member/Main Account for Members

- Any users that only have Account Manager R/W access will not be part of user certification and do not need to be certified.
- Changes to user accounts and access after window open are not reflected on User Certification.
- Account Manager displays the users Employed As field which the CAM can opt to leave with the current value or update the value. The Employed As field must be populated or the record cannot be saved.
- If the profile is associated with a subaccount then pop up instructions that the Employed As applies to the person's relationship to the Member/Main Account.

Certify System Account Accesses for All Members

- System Account only the accesses needs to be certified.
- User Relationship certification does not imply for system accounts.

Annual User Certification Quick Guide

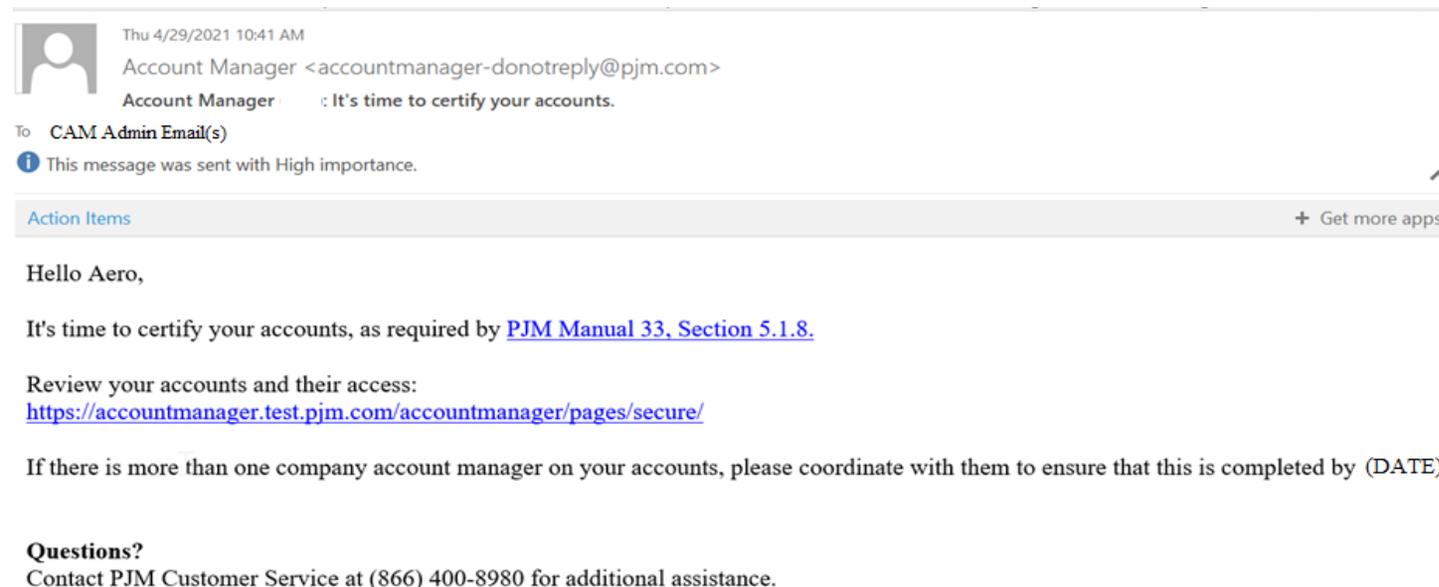
Who Can Certify Users and their Accesses

- Single-account CAMs are able to certify users and their accesses for the company account that they manage.
- SUMA CAMs are able to certify users and their accesses for all company accounts that they manage. **Please note if you are not a CAM on the user's main account you will only be able to certify the access of the user on the company accounts for which you are the CAM.**

Email Notifications for Certification Window Opening and Closing

All CAMs will receive email notifications when the annual user certification window opens and closes. CAMs will **ONLY** be able to certify their users and accesses during this 60 day window.

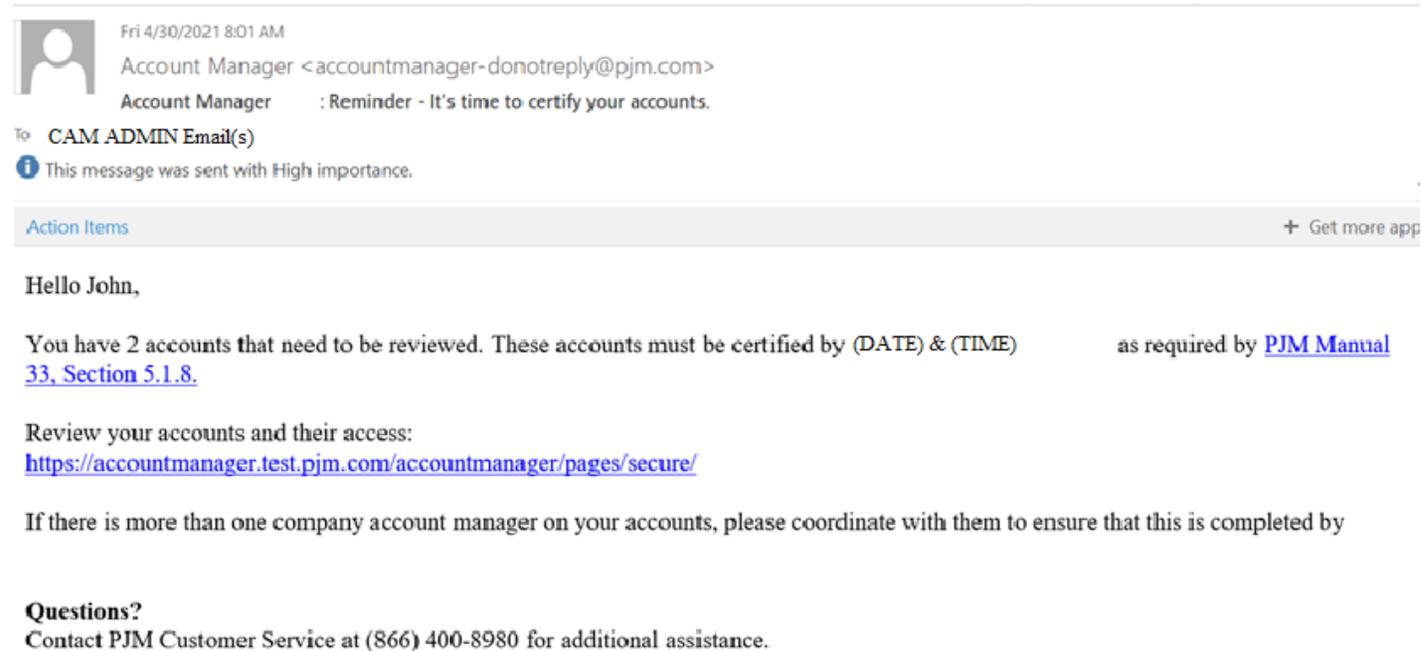
Email Notification to CAMs when window opens:



The screenshot shows an email notification from 'Account Manager' with the subject 'It's time to certify your accounts.' The email is addressed to 'CAM Admin Email(s)' and is marked as high importance. The body of the email includes a greeting 'Hello Aero,' followed by the instruction to certify accounts as required by 'PJM Manual 33, Section 5.1.8.' A link is provided to review accounts and their access: <https://accountmanager.test.pjm.com/accountmanager/pages/secure/>. A note states that if there is more than one company account manager, they should coordinate to ensure completion by a specific date. The email concludes with a 'Questions?' section, directing users to contact PJM Customer Service at (866) 400-8980 for assistance.

Annual User Certification Quick Guide

Email Notifications to CAMs when the will be window closes are sent at 15 days before, 7 days before, and 0 days of closing:



The screenshot shows an email from Account Manager with the following content:

Account Manager <accountmanager-donotreply@pjm.com>
Account Manager : Reminder - It's time to certify your accounts.

To: CAM ADMIN Email(s)

This message was sent with High importance.

Action Items + Get more app

Hello John,

You have 2 accounts that need to be reviewed. These accounts must be certified by (DATE) & (TIME) as required by [PJM Manual 33, Section 5.1.8](#).

Review your accounts and their access:
<https://accountmanager.test.pjm.com/accountmanager/pages/secure/>

If there is more than one company account manager on your accounts, please coordinate with them to ensure that this is completed by

Questions?
Contact PJM Customer Service at (866) 400-8980 for additional assistance.

Getting Started

For user certification actions, sign in to your CAM or SUMA CAM user account. Next click the “User Certification” tab, then either click the “Users” subtab or “System Accounts” subtab.

Annual User Certification Quick Guide

1. Click User Certification tab

Account Manager

User Certification - Users

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

Users System Accounts

Actions	2 First Name ▲	1 Last Name ▲	Username ▼	Email ▼	Employer ▼	Employed as ▼	Certification Date ▼
No records found.							

Records Per Page: 15 << < 0-0 of 0 records > >> Reset

2. Click either the Users or System Accounts subtab

How to Certify Users and Accesses for Users and System Accounts

SEARCH AND FILTERING TIPS - USER CERTIFICATION SCREEN

- Cannot use Wildcards, i.e. if you are searching for all users with a first name that starts with the letter “J”, type J in First Name search box and hit Enter
- Can filter alphabetically or numerically by using the ascending or descending order arrows for first name, last name, username, email, employer, employed as, or certification date

Annual User Certification Quick Guide

Must have “Employed as” field completed before you can certify your users. Certify Checkmark box will remain inactive until selected. Except for SUMA CAMs if you are not a CAM on their main company account you will not be able to change the “Employed as” field.

User Accounts Certification

User Certification - Users

User Certification | Pending Tasks | Add New User | User Profile | My Company | Search

Users | System Accounts

Actions	2 First Name ^	1 Last Name ^	Username ↕	Email ↕	Employer ↕	Employed as ↕	Certification Date ↕
<input type="checkbox"/>	Charlie	Brown	CB3522demo	charbro@gmail.com	PJM DEMO Company 1 [DEMO]		
<input type="checkbox"/>	Jeremy	Clarkson	JClarktst	jc@pjm.com	PJM TEST Company	Contractor	
<input type="checkbox"/>	Julissa	Craven	JCHYBRIDSCAM	j.craven@pjm.com	PJM Training, LLC (SUB 2) [PT]		
<input type="checkbox"/>	Julissa	Craven	JCSTGMERGE2	j.craven@pjm.com	PJM Training, LLC (SUB 1) [PT]		
<input type="checkbox"/>	Julissa	Craven	JCSTGMERGE	j.craven@pjm.com	PJM Training, LLC [PJMTRN]		
<input type="checkbox"/>	Nellie	Crawford	NRCtst123	nellie@pjm.com	PJM Training, LLC [PJMTRN]	Contractor	
<input type="checkbox"/>	Justin	Crow	JCSTG3522	justin.crow@pjm.com	PJM Training, LLC [PJMTRN]		

3. In the Actions Column click the pencil icon to select the user’s relationship to the main member company account (if it is not currently populated)

Annual User Certification Quick Guide

4. In Set Employed as pop-up box, click the drop down arrow to select user's relationship to the member company account then click Submit

Set Employed as

Specify the relationship of the user to the account PJM Training, LLC [PJMTRN]

Employed as * Select One

- Select One
- Agent
- Consultant
- Contractor
- Employee

Cancel Submit

Page: 15 << < 1-14 of 14 records > >> Reset

Now you will be able to certify that user and their accesses. Next, click the spy glass  to view the user's company account(s) and their access.

User Certification							
Pending Tasks							
Add New User							
User Profile							
My Company							
Search							
Users							
System Accounts							
Actions	2 First Name ^	1 Last Name ^	Username ↕	Email ↕	Employer ↕	Employed as ↕	Certification Date ↕
  	Julissa	Craven	JCHYBRIDSCAM	j.craven@pjm.com	PJM Training, LLC (SUB 2) [PT]	Employee	

Annual User Certification Quick Guide

On the Active Access screen pop out screen you can:

5. View Active Access

6. Terminate access by clicking the trashcan icon in the Actions column, next to the access that needs to be removed

7. Click User Profile Screen link to make updates to their profile information

The screenshot shows a pop-up window titled "Active Access" with a close button (X) in the top right corner. Below the title, there is a text block: "Below is the active access that JCHYBRIDSCAM has under the PJM Training, LLC (SUB 2) [PTSUB2] account. Access can be removed below, if needed, and other updates can be made on the [User Profile screen](#)." The text "User Profile screen" is highlighted with a dashed orange box. Below the text is a table with three columns: "Tool", "Access Type", and "Actions". The table contains six rows of data. The "Actions" column contains trashcan icons for each row. A dashed orange box highlights the "Actions" column. An orange line connects the text boxes to the corresponding elements in the screenshot.

Tool	Access Type	Actions
PJM	Public	
Member Community	Public	
Markets Gateway	Generator Read Write	
Resource Tracker	Read/Write	
Markets Gateway	Generator Read Only	
MSRS	Read Only	

Annual User Certification Quick Guide

After reviewing the user and their accesses,

8. Click the Checkmark box in the Actions Column to Certify the user

User Certification							
Pending Tasks							
Add New User							
User Profile							
My Company							
Search							
Users							
System Accounts							
Actions	2 First Name ^	1 Last Name ^	Username ⇅	Email ⇅	Employer ⇅	Employed as ⇅	Certification Date ⇅
<input checked="" type="checkbox"/>  	Julissa	Craven	JCHYBRIDSCAM	j.craven@pjm.com	PJM Training, LLC (SUB 2) [PT	Employee	

You should now see the date populated in the Certification Date column for this user

User Certification							
Pending Tasks							
Add New User							
User Profile							
My Company							
Search							
Users							
System Accounts							
Actions	2 First Name ^	1 Last Name ^	Username ⇅	Email ⇅	Employer ⇅	Employed as ⇅	Certification Date ⇅
  	Julissa	Craven	JCHYBRIDSCAM	j.craven@pjm.com	PJM Training, LLC (SUB 2) [PT	Employee	06/07/2021

Repeat this workflow for each additional user on your certification list.

Annual User Certification Quick Guide

SUMA CAMs

When you see a user in black rather than blue that means you are a CAM for that user just not for their main company account. You still need to certify the user's access that pertains to your company account. Please follow the process below for these users.

User Certification - Users

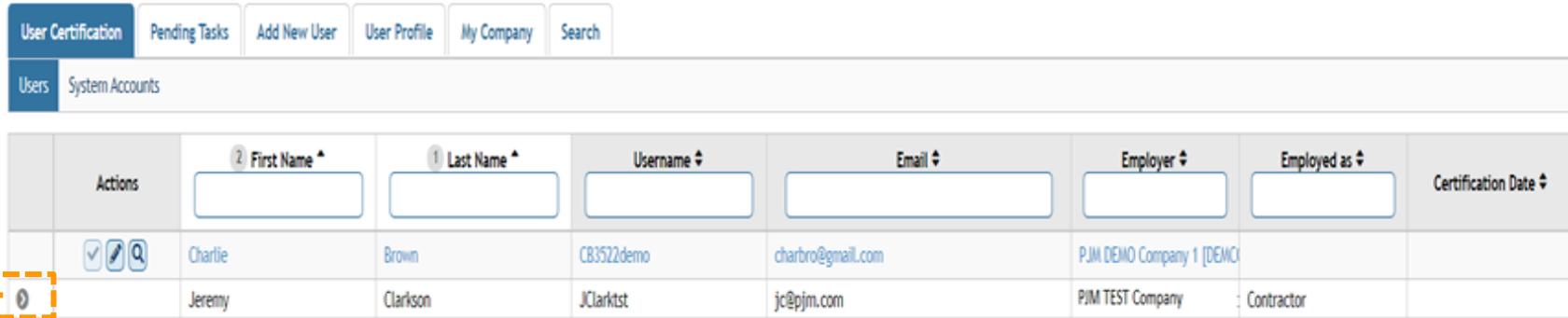
User Certification Pending Tasks Add New User User Profile My Company Search

Users System Accounts

Actions	2 First Name ^	1 Last Name ^	Username ↕	Email ↕	Employer ↕	Employed as ↕	Certification Date ↕
  	Charlie	Brown	CB3522demo	charbro@gmail.com	PJM DEMO Company 1 [DEMO]		
	Jeremy	Clarkson	JClarkst	jcl@pjm.com	PJM TEST Company	Contractor	
  	Julissa	Craven	JCHYBRIDSCAM	j.craven@pjm.com	PJM Training, LLC (SUB 2) [PT]		
  	Julissa	Craven	JCSTGMERGE2	j.craven@pjm.com	PJM Training, LLC (SUB 1) [PT]		
  	Julissa	Craven	JCSTGMERGE	j.craven@pjm.com	PJM Training, LLC [PJMTRN]		
   	Nellie	Crawford	NRCtst123	nellie@pjm.com	PJM Training, LLC [PJMTRN]	Contractor	
  	Justin	Crow	JCSTG3522	justin.crow@pjm.com	PJM Training, LLC [PJMTRN]		

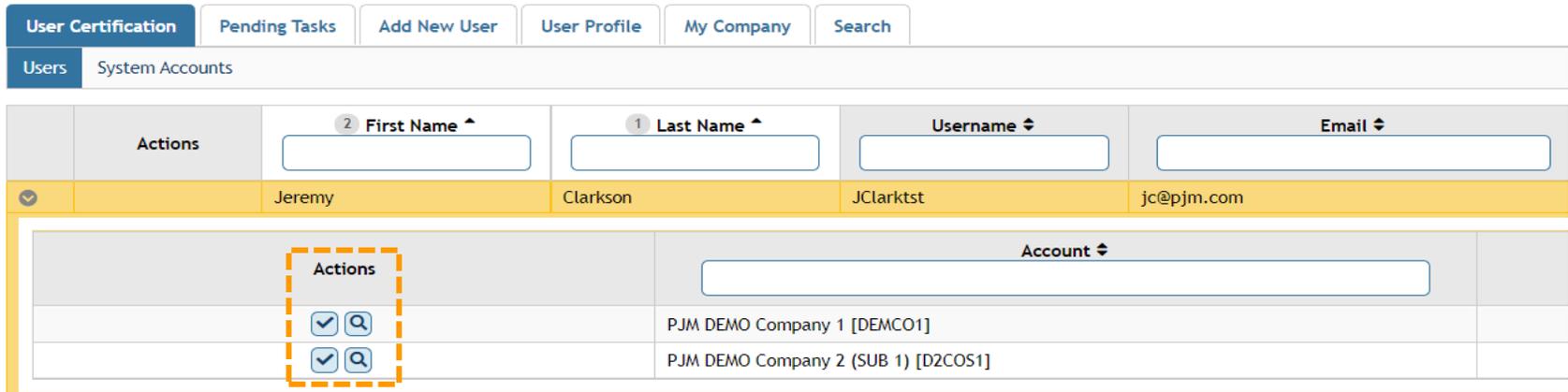
Annual User Certification Quick Guide

1. Click the drop down arrow in the first column



Actions	First Name ^	Last Name ^	Username ↕	Email ↕	Employer ↕	Employed as ↕	Certification Date ↕
✓ ↗ 🔍	Charlie	Brown	CB3522demo	charbro@gmail.com	PJM DEMO Company 1 [DEMC		
⌵	Jeremy	Clarkson	JClarkst	jc@pjm.com	PJM TEST Company	Contractor	

2. From the expanded rows view, you see the company accounts for which you are a CAM and the Actions column to either certify the user by clicking the checkmark icon or view accesses by clicking the spy glass icon.



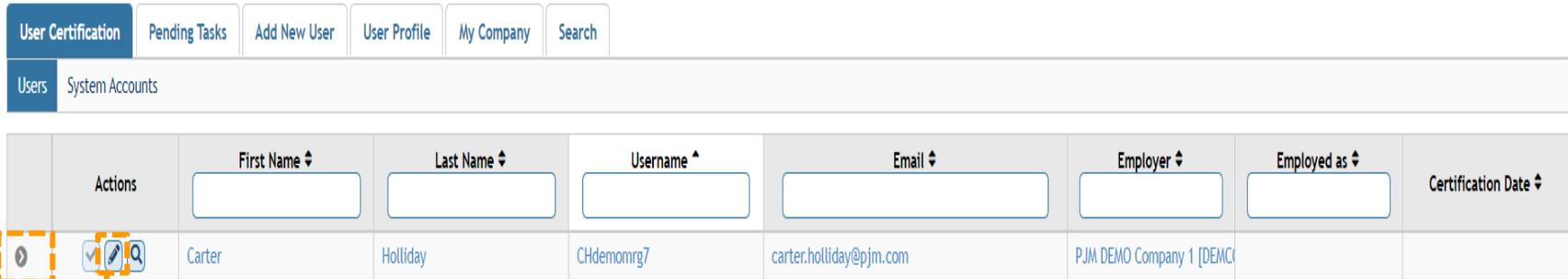
Actions	First Name ^	Last Name ^	Username ↕	Email ↕
⌵	Jeremy	Clarkson	JClarkst	jc@pjm.com
Actions		Account ↕		
✓ 🔍		PJM DEMO Company 1 [DEMCO1]		
✓ 🔍		PJM DEMO Company 2 (SUB 1) [D2COS1]		

When you click the spy glass icon you will be able to view their active accesses, terminate accesses, or view their user profile page before you certify the user. Need to click the checkmark for each account.

Annual User Certification Quick Guide

SUMA User Accounts

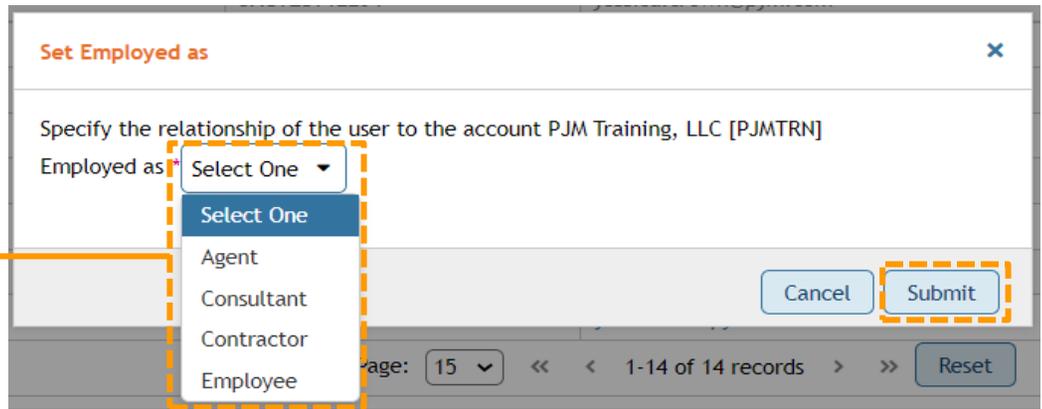
For users that have more than one company account under their user account, you will also see the drop down arrow in the first column.



Actions	First Name	Last Name	Username	Email	Employer	Employed as	Certification Date
	Carter	Holliday	CHdemomrg7	carter.holliday@pjm.com	PJM DEMO Company 1 [DEMO]		

1. Click pencil icon to completed “Employed As” field, if not currently completed

2. In Set Employed as pop-up box, click the drop down arrow to select user’s relationship to the member company account then click Submit



Set Employed as [Close]

Specify the relationship of the user to the account PJM Training, LLC [PJMTRN]

Employed as: Select One

- Select One
- Agent
- Consultant
- Contractor
- Employee

Cancel Submit

Page: 15 of 1-14 of 14 records [Reset]

Annual User Certification Quick Guide

3. Select the spy glass in yellow banner to review access for the main company a new pop out box will list the access. From the pop out box you can review active access, terminate accesses, or click the link to the user profile to view their profile information.

The screenshot shows the 'User Certification' interface. At the top, there are navigation tabs: 'User Certification', 'Pending Tasks', 'Add New User', 'User Profile', 'My Company', and 'Search'. Below this is a 'Users' section with a 'System Accounts' sub-tab. The main area contains a table with columns: 'Actions', 'First Name', 'Last Name', 'Username', 'Email', 'Employer', 'Employed as', and 'Certification Date'. A yellow banner highlights the 'Actions' column for the first row, which contains a checkmark, a pencil, and a magnifying glass icon. Below this, a secondary account table is shown with columns: 'Actions', 'Account', and 'Certification Date'. A yellow banner highlights the 'Actions' column for the first row of this table, which also contains a checkmark and a magnifying glass icon. Orange lines connect the text boxes to these specific icons.

Actions	First Name	Last Name	Username	Email	Employer	Employed as	Certification Date
<input checked="" type="checkbox"/>	Carter	Holliday	CHdemomrg7	carter.holliday@pjm.com	PJM DEMO Company 1 [DEMO]	Employee	

Actions	Account	Certification Date
<input checked="" type="checkbox"/>	PJM DEMO Company 2 (SUB 2) [DZCOS2]	

4. Select the spy glass in Actions column to review secondary account(s) accesses. A pop out box will list the access for the secondary account. From the pop out box you can review active accesses, terminate accesses, or click the link to the user profile to view their profile.

After finalizing the accesses for the SUMA user account for the main account and secondary account(s):

5. Click the checkmark icon in the Actions column for each secondary account, and then click "Yes" in the pop out box to complete subaccount user certification.

6. Click the checkmark icon in the yellow banner, and then click "Yes" in the pop out box to complete main account user certification.

Annual User Certification Quick Guide

System Accounts Certification

Please follow User certification workflow whether it is a single System Account or SUMA System Account, except you will not have to set the “Employed As” field.

1. Click User Certification tab then click System Accounts subtab.

The screenshot shows the user certification interface. At the top, there is a navigation bar with tabs: "User Certification", "Pending Tasks", "Add New User", "User Profile", "My Company", and "Search". Below this is a sub-tab bar with "Users" and "System Accounts". The "System Accounts" subtab is selected. Below the sub-tabs is a table with columns: "Actions", "First Name", "Last Name", "Username", "Email", "Employer", and "Certification Date". The table contains three rows of user data.

Actions	2 First Name ^	1 Last Name ^	Username ↕	Email ↕	Employer ↕	Certification Date ↕
<input checked="" type="checkbox"/> <input type="checkbox"/>	Jackson	Copenhagen	JACTESTSYS	jci@pjm.com	PJM DEMO Company 1 [DEMCO1]	
<input checked="" type="checkbox"/> <input type="checkbox"/>	Jac	Fraggles	JACTEST0987	dm2ops@pjm.com	PJM DEMO Company 2 [DEMCO2]	
<input checked="" type="checkbox"/> <input type="checkbox"/>	Jill	Hansen	JillHansen	Jhansen@pjm.com	PJM DEMO Company 2 [DEMCO2]	