

Annual User Certification Quick Guide



May 2024

TABLE OF CONTENTS

Overview.....	1
Email Notifications for Certification Window Opening and Closing	2
Getting Started.....	4
How to Certify Users and Accesses for User and System Accounts.....	5
User Accounts Certification Tab.....	7
SUMA CAMs.....	10
System Accounts Certification Tab.....	13
Bulk Terminate User / System Accounts	14
Bulk Certify User / System Accounts.....	15
CSV Export	16

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 Read/Write access will not be part of user certification and do not need to be certified.
- Changes made to access permissions after the window opens will be reflected in this user certification period; however, new user or system accounts created after the window opens will not be included.

Certify System Account Accesses for All Members

- Only the accesses need to be certified for a system account. The user relationship certification does not apply to system accounts.

Annual User Certification Quick Guide

Who Can Certify Users and Their Accesses

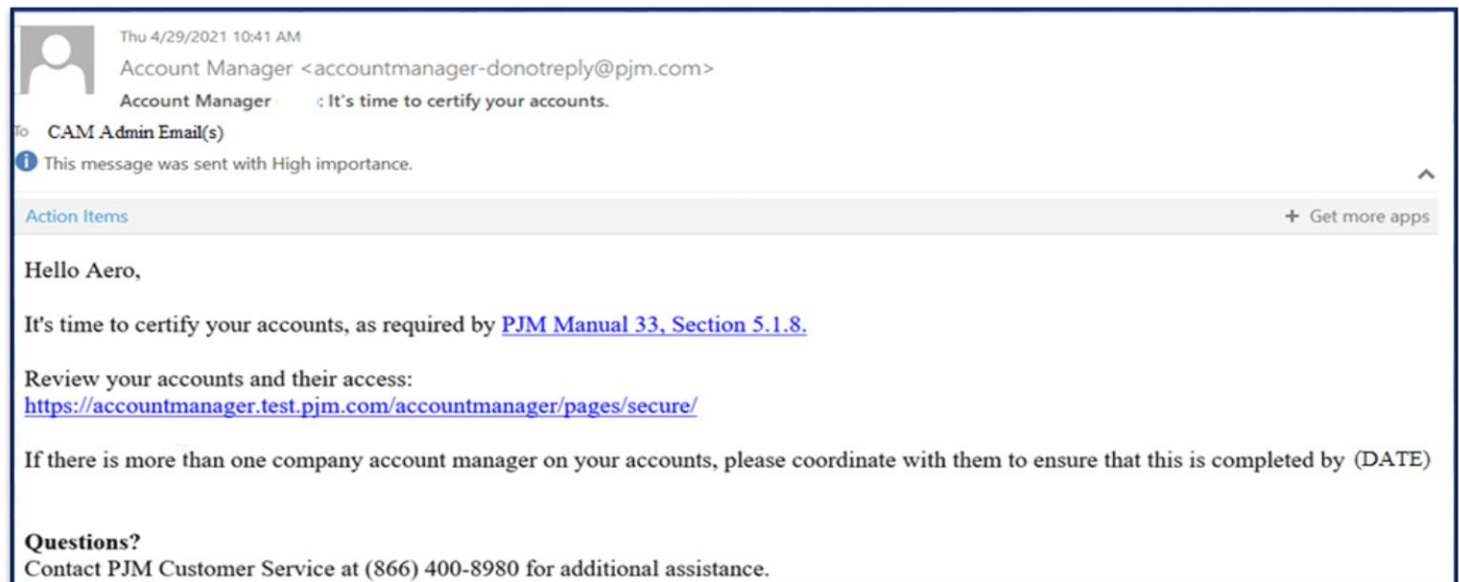
- Single-account CAMs are able to certify users and their accesses for the company account that they manage.
- SUMA CAMs are able to certify users and their accesses for all company accounts that they manage.

Please Note: If you are not a CAM for the user's main account, you will only be able to certify the access of the user related to the company account(s) for which you are the CAM.

Email Notifications for Certification Window Opening and Closing

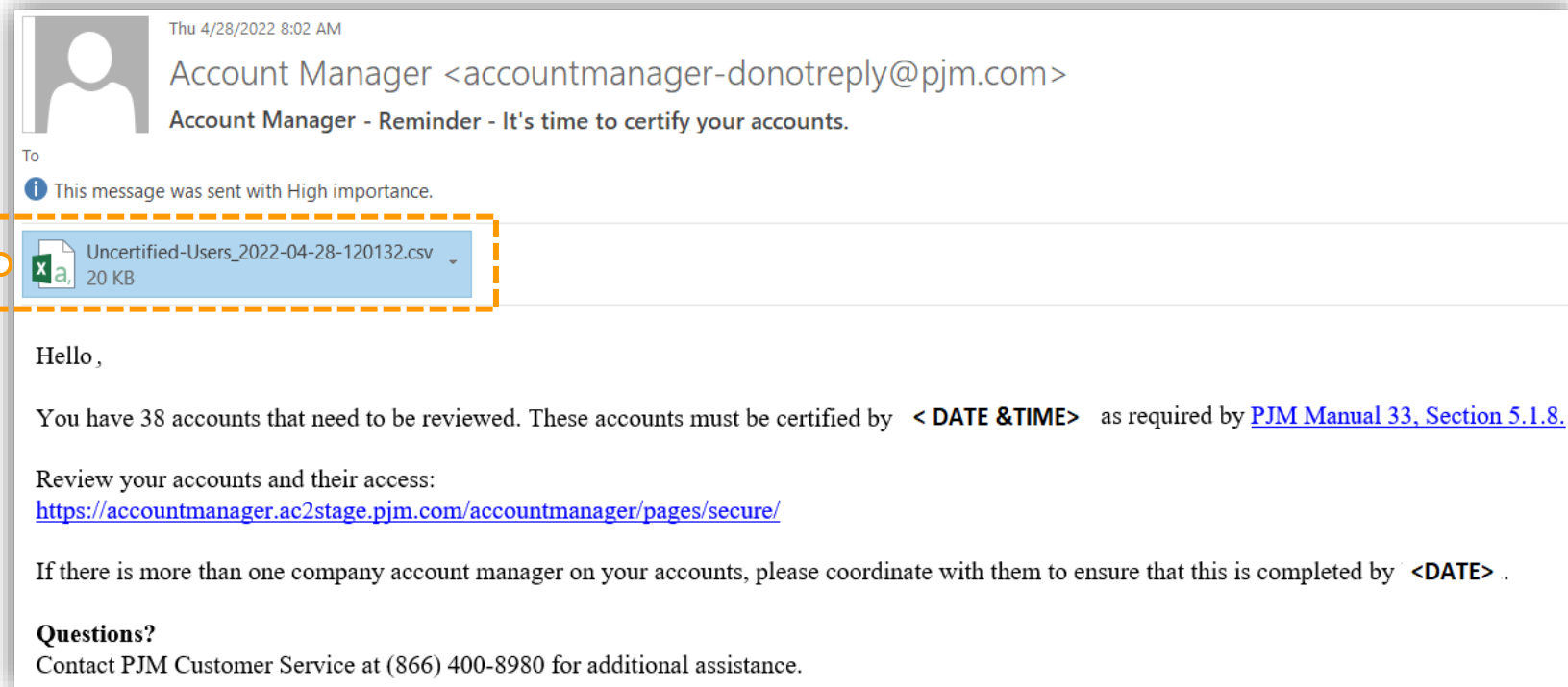
All CAMs will receive email notifications when the annual user certification window opens and closes. CAMs will **only** be able to certify their users and accesses during this 60-day window.

Example Email Notification When Window Opens



Annual User Certification Quick Guide

Example Email Notification of Window Closure



An Excel spreadsheet is provided as an attachment with the window closure email notifications to CAMs. This spreadsheet provides CAMs with the name, username(s), account(s), Employed as, tool access, lock status, and lock reason for outstanding users that still need to be certified prior to the window close date.

Email notification reminders to CAMs regarding the window closing are sent at 15-days before, 7-days before and on the day of closing.

Annual User Certification Quick Guide

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.

1. Click the **User Certification** tab.

The screenshot displays the 'Account Manager' interface for 'User Certification - Users'. The 'User Certification' tab is highlighted in blue. Below it, the 'Users' subtab is also highlighted in blue. An orange callout box points to the 'Users' subtab with the text: 'You will need to certify your users and their accesses under both subtabs.' The interface includes a navigation bar with 'User Certification', 'Pending Tasks', 'Add New User', 'User Profile', 'My Company', and 'Search'. Below the navigation bar are subtabs for 'Users' and 'System Accounts'. The main content area includes filters for 'Account type', 'Status', and 'Employed as', a 'Certify Users' button, and a table with columns for 'Select', 'SUMA', 'Actions', 'Status', 'First Name', 'Last Name', 'Username', 'Email', 'Employer', 'Employed as', and 'Certification Date'. A 'Feedback' button is visible in the top right corner.

You will need to certify your users and their accesses under both subtabs.

2. Click either the **Users** or **System Accounts** subtab to begin.

Annual User Certification Quick Guide

How to Certify Users and Accesses for User and System Accounts

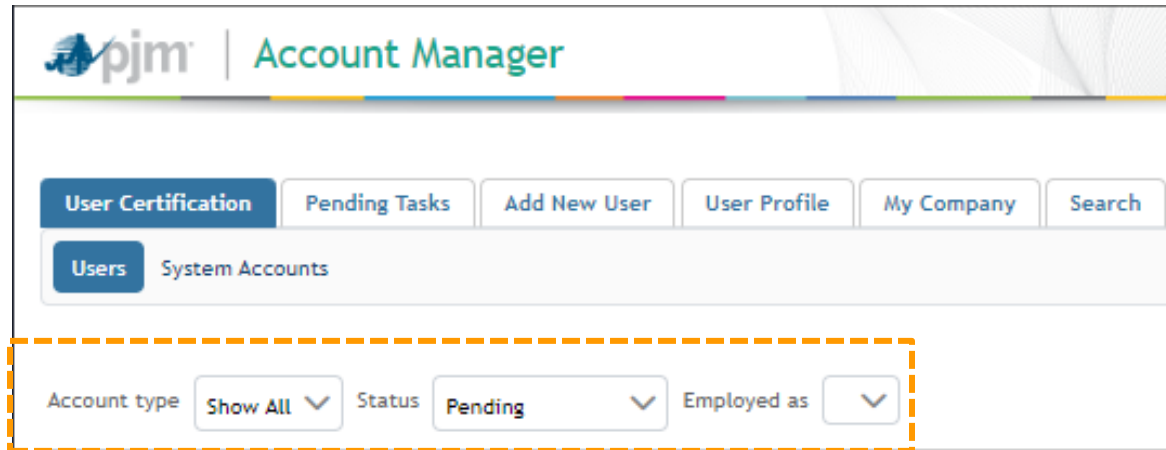
Search and Filtering Tips: User Certification Screen

- You can narrow your search results by using the dropdown arrow for the following fields on the Users tab:

A. **Account Type** – Show All (default), SUMA account(s), or Non-SUMA account(s)

B. **Status** – Show All, Pending (default), Partially Complete or Complete

C. **Employed as** – Select All (default), or click one or more employed as roles



On the System Accounts subtab you can narrow your search results by using the dropdown arrow for Account Type or Status fields.

- You can sort by locked or unlocked user accounts by using the ascending- or descending-order arrows in column 1. Hovering over the padlock icon provides you with the reason the account is locked.
- You can filter alphabetically or numerically by using the ascending- or descending-order arrows in the **First Name**, **Last Name**, **Username**, **Email**, **Employer**, **Employed as**, or **Certification Date** fields.
- You cannot use “wildcards (*)” if you are searching for all users with a first name that starts with the letters “Tim,” type Tim (no asterisk following the letters) in the **First Name** search box and hit **Enter**.

Employed as Field Definitions

- **Agent** – An entity or individual, not an employee of the Member, that performs actions or functions on behalf of the Member required under any PJM governing document, as designated in a PJM form of agreement authorizing PJM to deal with the Agent on behalf of the Member, including but not limited to a Declaration of Authority, license agreement, data sharing agreement, or consulting agreement. The actions of the Agent on behalf of Member shall be legally binding on the Member. The Member shall accept all responsibility, and be liable, for the receipt of information by the Agent or the provision of information to PJM by the Agent.
- **Consultant** – An entity or individual, not an employee of the Member who the Member has authorized PJM to share information with on its behalf as designated in a PJM form of agreement, including but not limited to a data sharing agreement or consulting agreement. The actions of the Consultant on behalf of the Member shall be legally binding on the Member. The Member shall accept all responsibility, and be liable, for the receipt of information by the Consultant or the provision of information to PJM by the Consultant.
- **Employee** – An employee of a Member.
- **Contractor** – An independent contractor or temporary worker of a Member.

Annual User Certification Quick Guide

User Accounts Certification Tab













User Certification - Users

1. Status filter is now updated to reflect Show All, Pending, Partially Complete, and Complete.

2. In the top right corner, there is a Total Completed counter. This will help identify how many users have been certified and/or still need to be certified.

3. Bulk Certify/Bulk Terminate Users action. When more than one user has been selected, this option will allow you to choose either Bulk Terminate or Certify Users.

4. In the *Actions* column, to certify a user you can now click on the **clipboard** icon, if the user is a SUMA user you will be asked to verify all access is correct. In addition, clicking the **magnifying glass** icon to see the user's relationship to the main member company account and their tool access. You can also update the user's access or navigate to their profile screen directly from the pop-out window.

Select	SUMA	Actions	Status	First Name	Last Name	Username	Email	Employer	Employed as	Certification Date
<input type="checkbox"/>		 	Pending	Julissa	Craven	JCSTGMERGE2	j.craven@pjm.com	CAM Training ONLY, LLC (SUB 1) [CMSUB1]	Employee	
<input type="checkbox"/>	2	 	Pending	Julissa	Craven	JCSTGMERGE	j.craven@pjm.com	CAM Training ONLY, LLC [CAMTRN]	Contractor	
<input type="checkbox"/>		 	Pending	Julissa	Craven	JCHYBRIDSCAM	j.craven@pjm.com	CAM Training ONLY, LLC (SUB 2) [CMSUB2]	Contractor	
<input type="checkbox"/>		 	Pending	Justin	Crow	JCSTG3522	justin.crow@pjm.com	CAM Training ONLY, LLC [CAMTRN]	Contractor	
<input type="checkbox"/>	1	 	Pending	Richard	Hammond	rhammond	Rhammond@pjm.com	CAM Training ONLY, LLC [CAMTRN]	Contractor	
<input type="checkbox"/>		 	Pending	George	Johnson	geojohn	geo.johnson@pjm.com	CAM Training ONLY, LLC [CAMTRN]	Agent	

Total Completed: 0/28





Certify Users CSV

Annual User Certification Quick Guide

5. Example of pop-out Account Access window.

Accounts for Julissa Craven

Below is the active access for Julissa Craven. Access can be removed below. Other updates can be made from the [User Profile screen](#).

Accounts			Access		
Actions	Account	Certification Date	Actions	Tool	Access Type
	CAM Training ONLY, LLC (SUB 1)		  	Data Viewer PJM System Map	Read/Write Public Read Only

Clicking this link will allow you to navigate directly to the user's profile screen.

Here you will see the account in which the user has access to that you are a CAM Admin for. You can also certify the user from this screen by clicking on the **clipboard** icon.

You can view and then terminate a user's access, if applicable, by clicking on the **trash can** icon.

If you terminate all access from this screen, you will receive the following pop-up warning box. If you need to terminate the account please click the *here* link in the pop-up box and terminate from the User Profile screen.

User Certification ✕



This user will now have default access. If you do not want this user to continue to have access, terminate the account [here](#).

Close



Annual User Certification Quick Guide

After reviewing the user and their access(es):

6. To certify a user and their access, you can either click the **clipboard** icon in the *Actions* column on the main User Certification dashboard, or click the **magnifying glass** icon to open the pop-out window and certify the user here by clicking the **clipboard** icon.

Select	SUMA	Actions	Status	First Name	Last Name	Username	Email	Employer	Employed as	Certification Date
<input type="checkbox"/>		 	Pending	Julissa	Craven	JCSTGMERGE2	j.craven@pjm.com	CAM Training ONLY, LLC (SUB 1) [CMSUB1]	Employee	

You should now see the date populated in the Certification Date column for this user, as well as Complete in the Status column. In addition, your Total Completed tracker in the top right corner will update in real-time as users are certified.

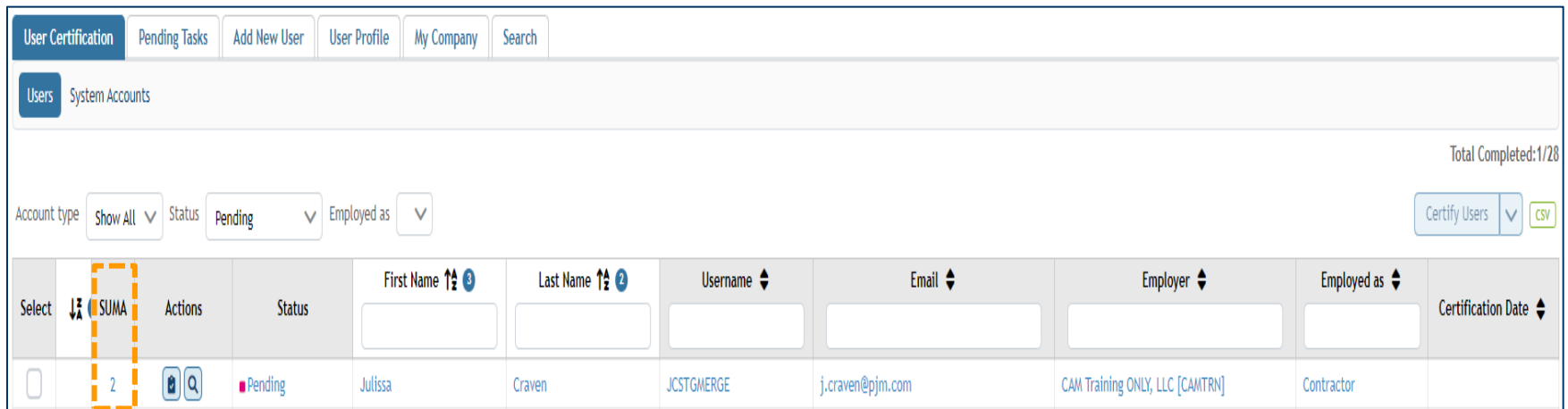
Select	SUMA	Actions	Status	First Name	Last Name	Username	Email	Employer	Employed as	Certification Date
<input type="checkbox"/>		 	Complete	Julissa	Craven	JCSTGMERGE2	j.craven@pjm.com	CAM Training ONLY, LLC (SUB 1) [CMSUB1]	Employee	05/17/2023

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

Annual User Certification Quick Guide

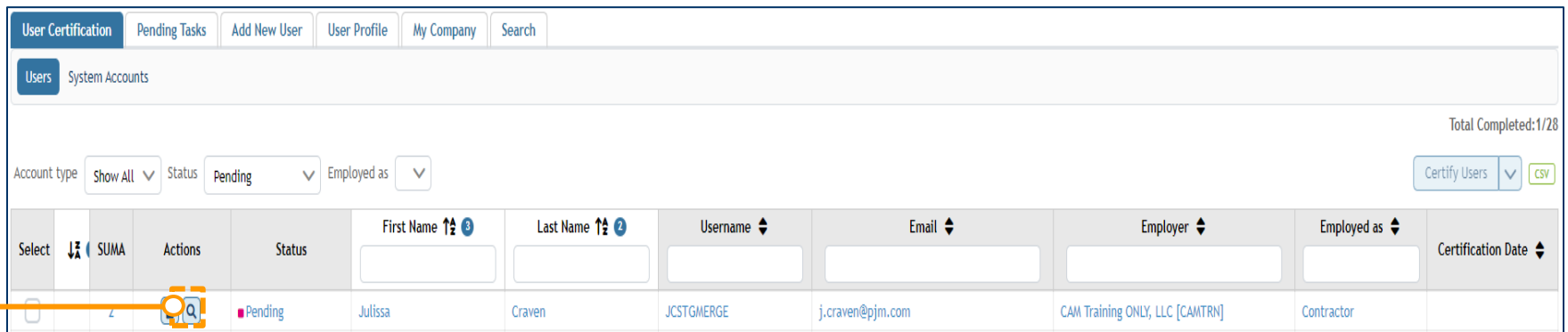
SUMA CAMs

When you see a number in the SUMA column to the left of the user's account, this means they are a SUMA user with access under multiple company accounts in which you serve as a CAM Admin for. You will need to certify the user's access that pertains to your company account(s). Please follow the process below for these users.



Select	SUMA	Actions	Status	First Name	Last Name	Username	Email	Employer	Employed as	Certification Date
<input type="checkbox"/>	2		Pending	Julissa	Craven	JCSTGMERGE	j.craven@pjm.com	CAM Training ONLY, LLC [CAMTRN]	Contractor	

1. Click the **magnifying glass** icon in the Actions column to view user's access.



Select	SUMA	Actions	Status	First Name	Last Name	Username	Email	Employer	Employed as	Certification Date
<input type="checkbox"/>	2		Pending	Julissa	Craven	JCSTGMERGE	j.craven@pjm.com	CAM Training ONLY, LLC [CAMTRN]	Contractor	

Annual User Certification Quick Guide

- From the pop-out menu, you will see the company account(s) for which you are a CAM. In the *Accounts* table, review their accesses by clicking on each company account. To the right, in the *Access* table, the user's access for that company will appear to view and terminate, if applicable. You can then certify the user's access under each company by clicking the **clipboard** icon. The user's profile is also accessible by clicking on the blue text "User Profile screen."

Accounts for Julissa Craven ✕

Below is the active access for Julissa Craven.
Access can be removed below. Other updates can be made from the [User Profile screen](#).

Accounts			Access		
Actions	Account	Certification Date	Actions	Tool	Access Type
	CAM Training ONLY, LLC			ExSchedule	Read/Write
	CAM Training ONLY, LLC (SUB 1)			Markets Gateway	Generation Read Write
	CAM Training ONLY, LLC (SUB 2)			Markets Gateway	Load Read Write
				MSRS	Read Only
				OASIS	Read/Write
				Planning Center	Queue Point Read Write
				Power Meter	Read/Write

When you click through each company account, you will be able to view active accesses, terminate accesses (with the exception of Account Manager R/W) or view the user's profile page before you certify the user. Click the **clipboard** icon for each account to complete the certification.

Annual User Certification Quick Guide

You should now see the date populated in the Certification Date column for this user, as well as Complete in the Status column. In addition, your Total Completed tracker in the top right corner will update in real-time as users are certified.

Select	SUMA	Actions	Status	First Name	Last Name	Username	Email	Employer	Employed as	Certification Date
<input type="checkbox"/>			Complete	Julissa	Craven	JCSTGMERGE2	j.craven@pjm.com	CAM Training ONLY, LLC (SUB 1) [CMSUB1]	Employee	05/17/2023

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

****Please note that if an individual has Account Manager R/W privileges provisioned to their user account, their user account cannot be terminated from the User Certification Window. Please have an Authorized Representative, Officer, or Maintenance Manager from your company submit a CAM Maintenance Request through the Membership Management Community to first revoke their access. Once their CAM Admin access has been removed from their user account by PJM, their user account can then be completely terminated.****

Annual User Certification Quick Guide

System Accounts Certification Tab

1. Click the **User Certification** tab, then click the **System Accounts** subtab.

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 these, there are sub-tabs: 'Users' and 'System Accounts'. The 'System Accounts' sub-tab is selected. Below the sub-tabs, there are filters: 'Account type' set to 'Show All' and 'Status' set to 'Pending'. On the right, there is a 'Total Completed: 0/7' indicator and a 'Certify Users' button with a 'CSV' link. The main content is a table with the following columns: 'Select', 'SUMA', 'Actions', 'Status', 'First Name', 'Last Name', 'Username', 'Email', 'Employer', and 'Certification Date'. Two rows of data are visible, both with a 'Pending' status.

Select	SUMA	Actions	Status	First Name	Last Name	Username	Email	Employer	Certification Date
<input type="checkbox"/>	2		Pending	Zulu	Wonder	JATEST1234	zwonder@pjm.com	CAM Training ONLY, LLC [CAMTRN]	
<input type="checkbox"/>			Pending	Brett	Michael	bmicha	brettmichael@pjm.com	CAM Training ONLY, LLC [CAMTRN]	

Please follow the user certification workflows above whether it is a single System Account or a SUMA System Account.

Annual User Certification Quick Guide

Bulk Terminate User / System Accounts

During user certification, if you discover user and/or system accounts that are dormant or no longer needed, please terminate them. If you have multiple accounts to terminate, please use the **Bulk Terminate Users** button. When you terminate the account(s), the completion date will auto-populate completing their user certification requirements for this event.

How to Bulk Terminate Accounts

1. Click the select box for each user account to terminate.

2. Click **Bulk Terminate Users** button.

3. Click **Yes** to terminate accounts.

4. Certification date auto-populates, certifying the terminated accounts.

Repeat this process for any System Accounts that may need to be terminated. Remember to click the System Account subtab to view system accounts for which you are a CAM.

The screenshot displays 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 these, there are sub-tabs for 'Users' and 'System Accounts'. A table lists user accounts with columns for 'Select', 'SUMA', 'Actions', 'Status', 'First Name', 'Last Name', 'Company', 'Email', 'Employer', 'Employed as', and 'Certification Date'. Three users are listed, all with a 'Pending' status. The 'Select' column for the first two users has a checked checkbox. A 'Bulk Termination' dialog box is open in the center, displaying a warning icon and the message: 'You will terminate 1 user(s). Are you sure? You are unable to terminate 1 user(s) and no changes will be made.' The dialog has 'Yes' and 'No' buttons. A 'Certification Date' dropdown menu is open on the right, showing the date '05/17/2023'. A 'Total Completed: 1/28' indicator is visible in the top right corner.

Annual User Certification Quick Guide

Bulk Certify User / System Accounts

During user certification, you will also have the option to Bulk Certify user and System accounts. Please carefully review each user or System account before completing this action. After reviewing each account, you can activate the Bulk Certify option by selecting more than one user or System account. When you certify the account(s), the completion date will auto-populate completing their user certification requirements for this event.

How to Bulk Certify Accounts

The screenshot shows a web application interface for user certification. At the top, there are navigation tabs: 'User Certification', 'Pending Tasks', 'Add New User', 'User Profile', 'My Company', and 'Search'. Below these are sub-tabs for 'Users' and 'System Accounts'. A 'Bulk Certification' dialog box is open in the center, displaying a warning: 'You will certify 2 user(s). Are you sure?' with 'Yes' and 'No' buttons. The 'Yes' button is highlighted with a dashed orange box. A callout box labeled '4. Click Yes to certify accounts.' points to this button. To the right, a 'Certify Users' dropdown menu is highlighted with a dashed orange box, with a callout box labeled '2. Click Bulk Certify Users button.' pointing to it. Below the dialog, a table of users is visible. The first row is unselected, while the second and third rows are selected with checkmarks in the 'Select' column. A callout box labeled '1. Click the select box for each user account to certify.' points to the 'Select' column. The table columns include 'SUMA', 'Actions', 'Status', 'First Name', 'Last Name', 'Employer', 'Employed as', and 'Certification Date'. The 'Certification Date' for the selected rows is '05/17/2023'. A callout box labeled '4. Certification date auto-populates, certifying the terminated accounts.' points to this date. At the bottom left, a summary box with an orange border contains the text: 'Repeat this process for any System Accounts that may need to be certified. Remember to click the System Account subtab to view system accounts for which you are a CAM.'

1. Click the select box for each user account to certify.

2. Click **Bulk Certify Users** button.

4. Click **Yes** to certify accounts.

4. Certification date auto-populates, certifying the terminated accounts.

Repeat this process for any System Accounts that may need to be certified. Remember to click the System Account subtab to view system accounts for which you are a CAM.

Annual User Certification Quick Guide

CSV Export

Once user certification opens, CAMs have the option to use the CSV file button if they would like to export their user accounts list into an Excel file to review prior to certifying their user accounts and/or system accounts. Also, if you wish to have a record after you certify all of your user accounts and/or system accounts you can export the lists for your records. You can use the *Account Type*, *Status*, or *Employed as* filters to modify your results as need for your CSV exports.

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 these, there are two tabs: 'Users' (selected) and 'System Accounts'. A search bar is located below the tabs. The main area contains a table of user accounts. Above the table, there are filters for 'Account type' (set to 'Show All'), 'Status' (set to 'Pending'), and 'Employed as'. A 'Certify Users' button is visible, along with a 'CSV' button highlighted by an orange dashed box. The table has columns for 'Select', 'SUMA', 'Actions', 'Status', 'First Name', 'Last Name', 'Username', 'Email', 'Employer', 'Employed as', and 'Certification Date'. One user is listed: Julissa Craven, with username JCSTGMERGE, email j.craven@pjm.com, employer CAM Training ONLY, LLC [CAMTRN], and employed as Contractor. The status is 'Pending'. The total completed is 1/28.

Select	SUMA	Actions	Status	First Name	Last Name	Username	Email	Employer	Employed as	Certification Date
<input type="checkbox"/>	2		● Pending	Julissa	Craven	JCSTGMERGE	j.craven@pjm.com	CAM Training ONLY, LLC [CAMTRN]	Contractor	