

Whitelist & SUMA Functionality

May 20, 2020 Tech Change Forum

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Agenda for Whitelisting and SUMA

- Whitelisting
 - 1. Importance of whitelists
 - 2. Maintaining whitelists
 - 3. Deadline Reminder for existing Company Accounts
 - 4. Live: How-to add and maintain

- Single User Multi Account (SUMA)
 - What is SUMA
 - 2. CAM SUMA vs Non-SUMA
 - 3. Live How-to create SUMA CAM vs. Non-SUMA accounts

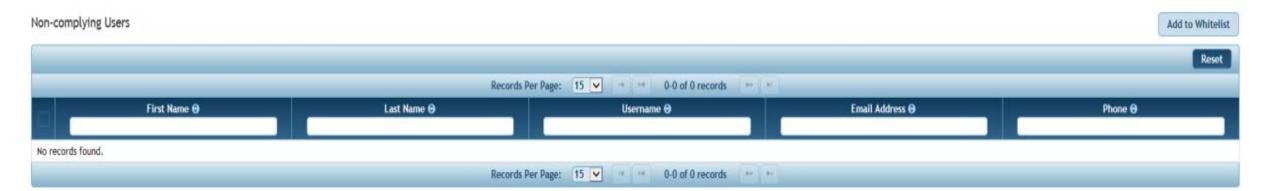


- Account Manager Whitelist Functionality
- 1. The Whitelist is a list of email addresses or domains that are approved and managed by the CAMs.
- 2. By default whitelists will be empty for all companies until email addresses or domains are added by the CAMs.
- 3. For added security, restricts individuals from creating a user account under the accounts with whitelisted email addresses/domains that do not match.
- 4. Streamline the User Recertification Process which will be rolled out in August 2020.
- Whitelists are required as of June 30, 2020 for all existing member companies.

How To Add Whitelist

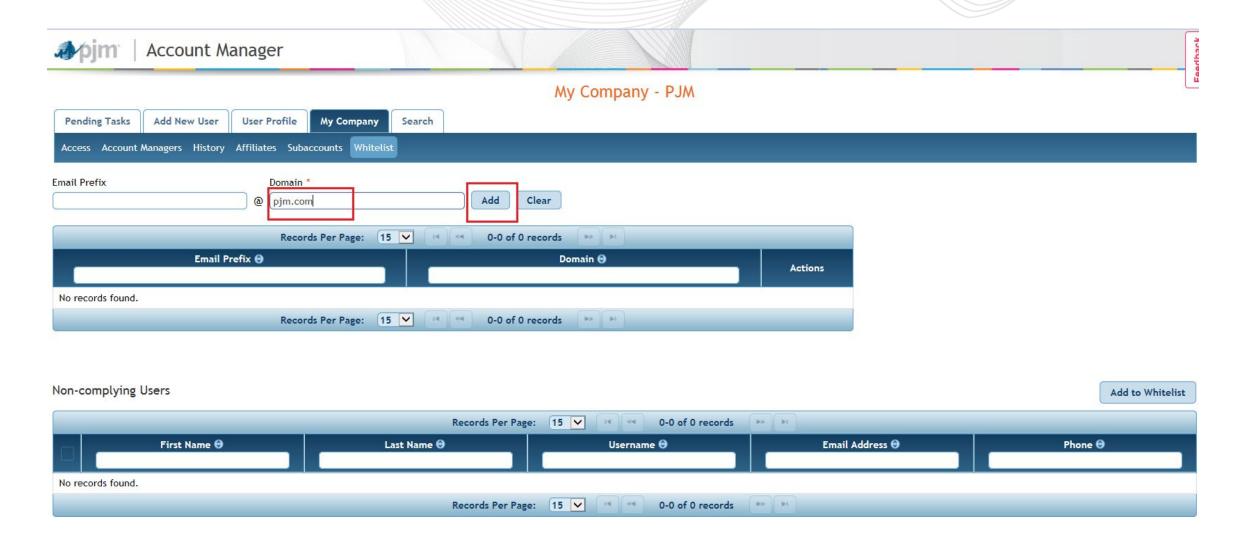
My Company - PJM







How To Add Whitelist





How To Add Whitelist

My Company - PJM Add New User **User Profile** Search Pending Tasks My Company Access Account Managers History Affiliates Subaccounts Whitelist **Email Prefix** Domain * Add **a** Clear Records Per Page: 15 💙 1-1 of 1 records Email Prefix 0 Domain \varTheta Actions @pjm.com Records Per Page: 15 🗸 1-1 of 1 records Non-complying Users Add to Whitelist Records Per Page: 15 🗸 1-15 of 1065 records **▶>** ▶I First Name ⊖ Email Address \varTheta Last Name \varTheta Username **⊖** Phone ⊕ Delete Me deleteme13 test@bit-bucket.pjm.com 1234567890 Joey Tribiani tribiani123 test@bit-bucket.pjm.com 2151112222 Samantha 111-222-3333 Smith sunshine321 test@bit-bucket.pjm.com Cortrudo 777-888-9999-5 Haude tost@bit bucket pim com

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- Account Manager SUMA
- 1. Single User Multiple Account (SUMA) provides the ability to link multiple accounts and SUMA enabled tool access to a single primary user account.
- 2. User may access all their company accounts and tools associated with their SUMA user account from single login.
- 3. SUMA accounts can be created for CAMs and Non-CAM users
- Note: Member CAM(s) that are CAM(s) to multiple accounts and want to link them under a single user account should submit a new CAM Form B/B1. As part of the process, the CAM(s) should identify a primary account that will be used to provide default access as well as for auditing purposes



Rules

- 1. The primary account is the only account that will have the default tools access. Default tools are: Data Miner API, Member Community public, and My PJM public
- 2. All tool access requests would require approval from the company CAM
- Both SUMA enabled and non SUMA enabled tools can be requested for the Primary account
- 4. Only SUMA enabled tools can be requested for the Secondary accounts

Benefits of using Single User Multi Account (SUMA):

- 1. One account password to manage
- 2. User experience users can move between company accounts securely without having to login each time.



SUMA vs. Non-SUMA Tools

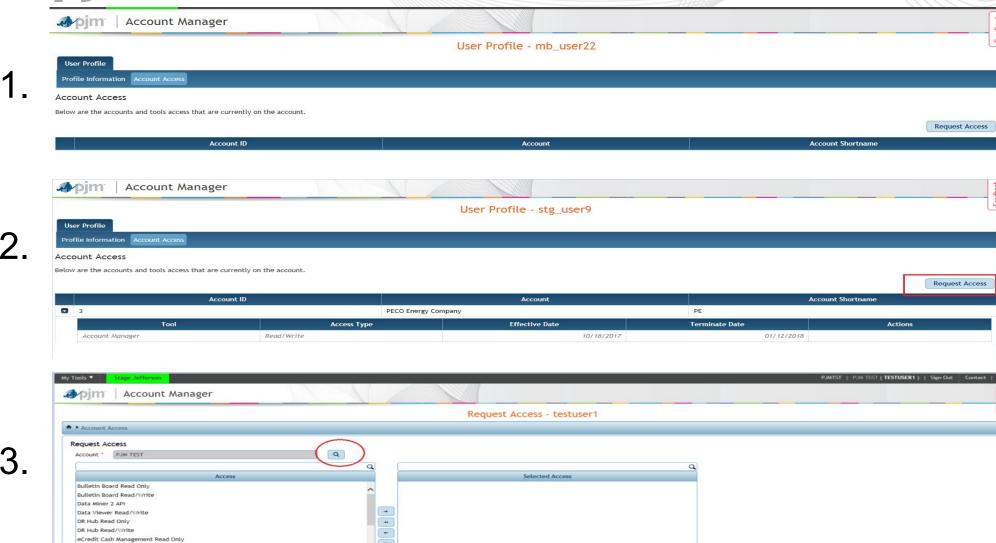
Name	Single User/Multi Account
Account Manager	true
Billing Line Item Transfer	true
Bulletin Board	true
Capacity Exchange	true
Competitive Planner	true
DER Directory	true
DR Hub	true
ExSchedule	true
FTR Center	true
InSchedule	true
Markets Gateway	true
MSRS	true
OASIS	true
Planning Center	true
Planning Center Gen Model	true
Power Meter	true
Resource Tracker	true

Name	Single User/Multi Account
Data Miner	false
Data Viewer	false
eCredit	false
eDART	false
eDart Generation Outage	false
eDart Transmission Outage	false
eDataFeed	false
eGADS	false
Emergency Procedures	false
Gas Pipeline	false
Member Community	false
Messages	false
My PJM	false
PJM Now	false
Post Contingency Local Load Relief Warning	false
System Map	false
Voting	false

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Non-CAM SUMA Account Creation



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Cont. Non-SUMA Creation

Account ©

TYPE Account Name Here

PJM (LS Power)

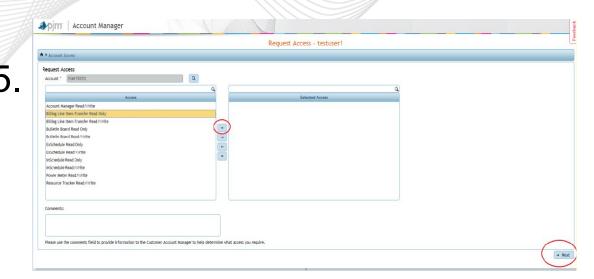
PJM TEST

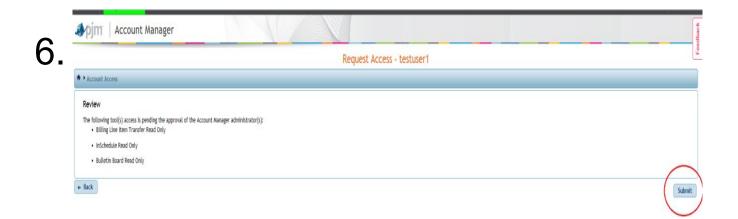
PJM TEST2

PJM Test 5

PJM Test 3

Cancel Submit





 If you have additional accounts to link, please repeat steps 1-6

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Whitelist Guidance - https://pjm.com/-/media/etools/account-manager-user-guide.ashx?la=en

- SUMA Guidance https://pjm.com/-/media/etools/account-manager/single-user-multi-account-quick-start-guide.ashx?la=en
- For additional questions or assistance please email camadmin@pjm.com