Annual User Certification Quick Guide

June 2021

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Overview

For security purposes, PJM ~~is~~ now ~~requiring~~ requires CAMs to perform an annual review of users and their authorized access ~~on an annual basis~~ to ensure that all ~~e~~ user accounts~~s~~ ~~who are~~ in Account Manager ~~are continually reviewed as authorized for their accesses by their CAMs~~have the appropriate access authorizations~~. Also to ensure CAMs are monitoring their users and~~ and to certify that the users who have access are authorized to do business on behalf of their listed organization ~~for which they are CAMs~~. 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 ~~don't have any other access but~~only have Account Manager R/W access will not be ~~on~~ part of user certification and do not need to be certified.

- Changes to user accounts and acces~~sses~~ 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.
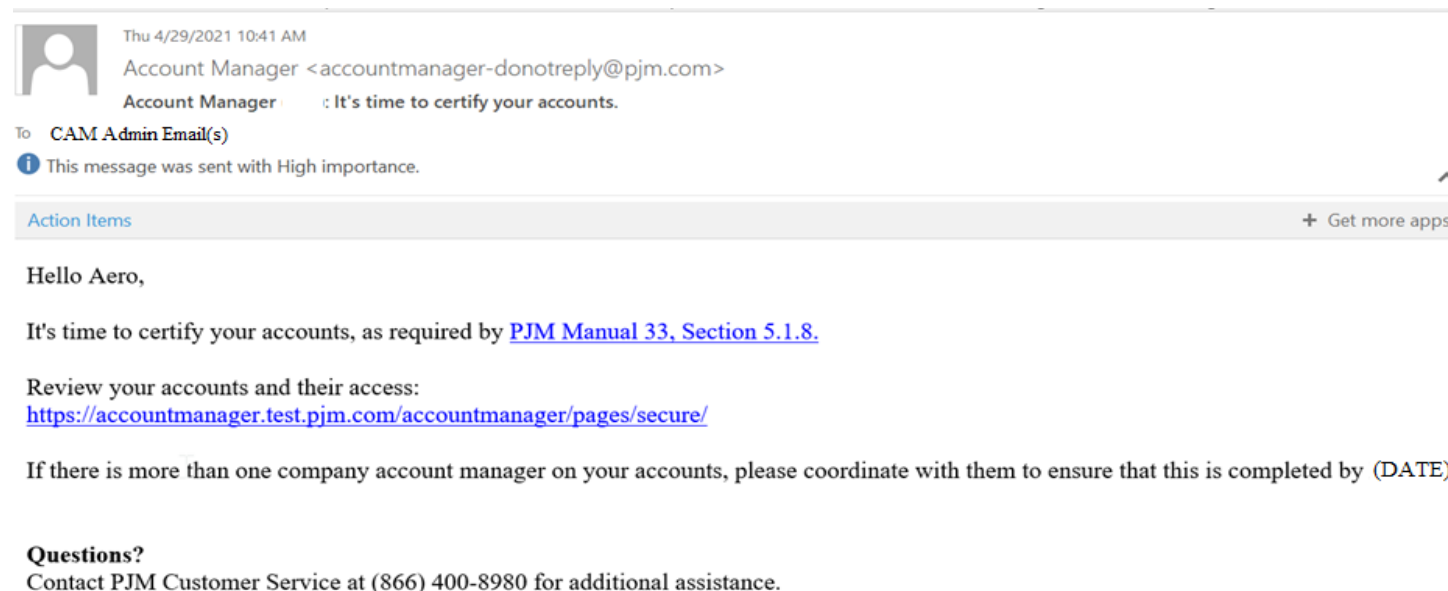
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Who Can Certify Users and their Accesses

- 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. **<u>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</u>**.

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:

Thu 4/29/2021 10:41 AM

Account Manager <accountmanager-donotreply@pjm.com>

Account Manager   : It's time to certify your accounts.

To   CAM Admin Email(s)

ⓘ This message was sent with High importance.

Action Items   + Get more apps

Hello Aero,

It's time to certify your accounts, 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 (DATE)

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

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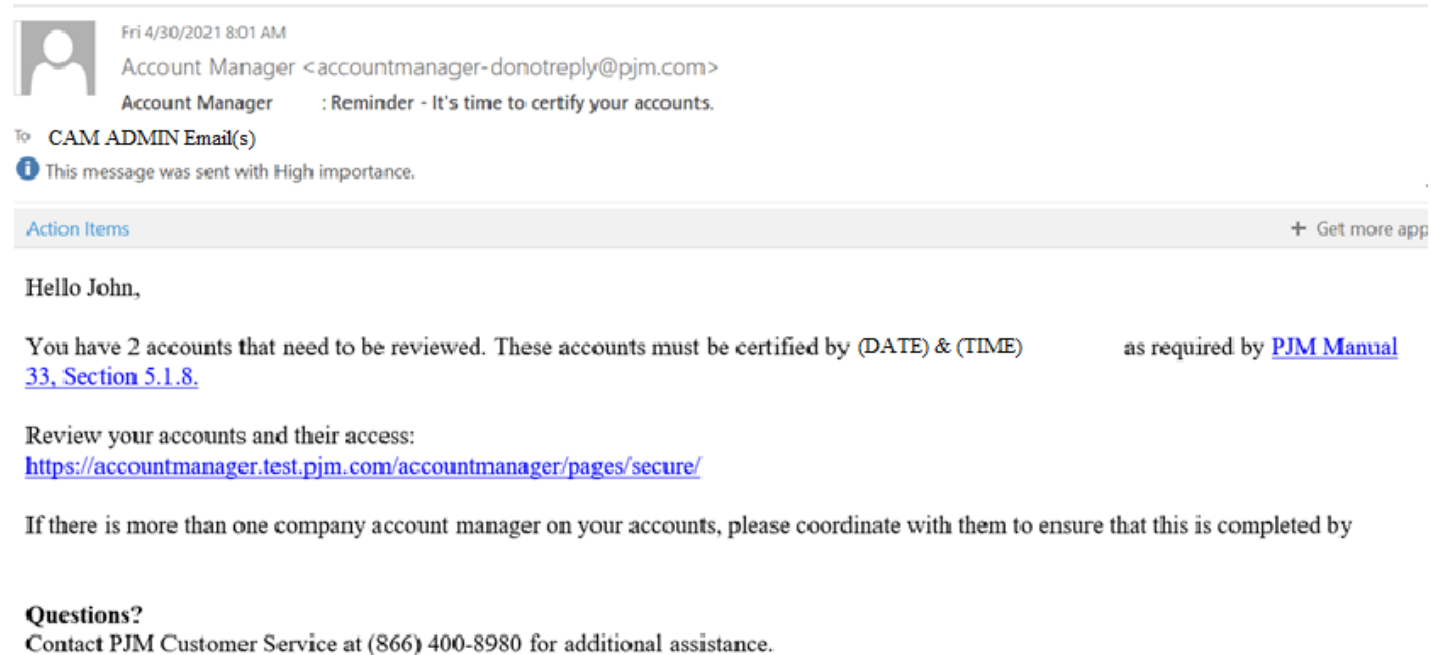
Getting Started

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.

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1. **Click User Certification tab**

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

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> **Must have "Employed as" field completed before you can certify your users. Certify Checkmark box will remain inactive until selected. Except for <u>SUMA CAMs</u> 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 ⇕
✔ ✏ 🔍	Charlie	Brown	CB3522demo	charbro@gmail.com	PJM DEMO Company 1 [DEMC(		
❯	Jeremy	Clarkson	JClarktst	jc@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]		

> 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)

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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

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.

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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

Active Access ✕

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.

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	🗑

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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 ⬍
☑ ✏ 🔍	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.

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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.
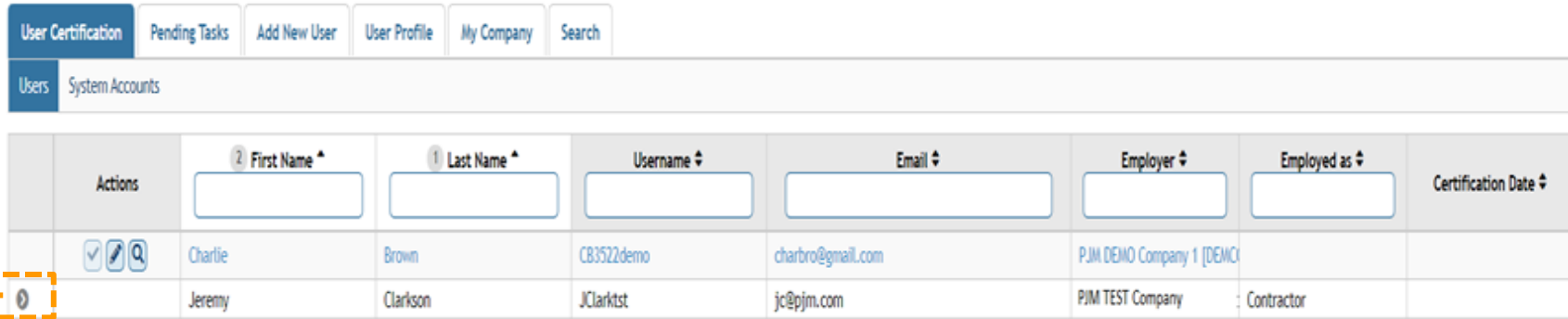
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1. Click the drop down arrow in the first column

	Actions	² First Name ▲	¹ Last Name ▲	Username ⇕	Email ⇕	Employer ⇕	Employed as ⇕	Certification Date ⇕
	✓ ✎ 🔍	Charlie	Brown	CB3522demo	charbro@gmail.com	PJM DEMO Company 1 [DEMCO		
◉		Jeremy	Clarkson	JClarktst	jc@pjm.com	PJM TEST Company	: Contractor	

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

Users | System Accounts

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.

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

Users | System Accounts

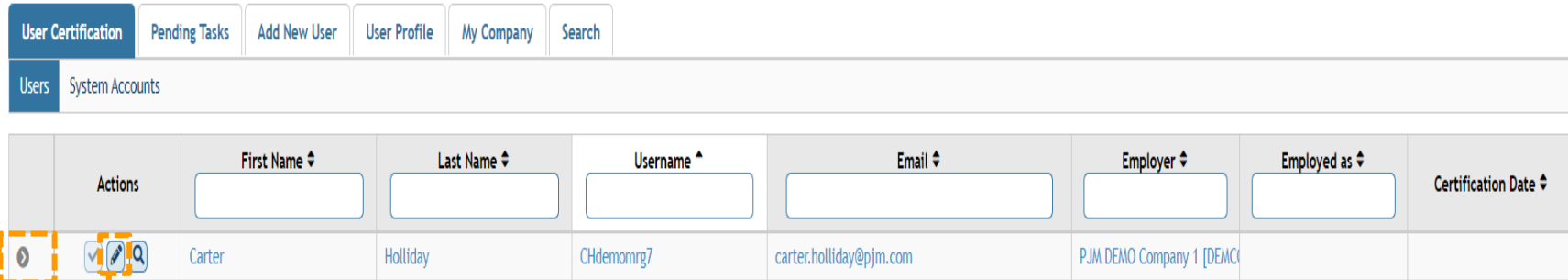|	Actions	² First Name ▲	¹ Last Name ▲	Username ⇕	Email ⇕
◉		Jeremy	Clarkson	JClarktst	jc@pjm.com

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.

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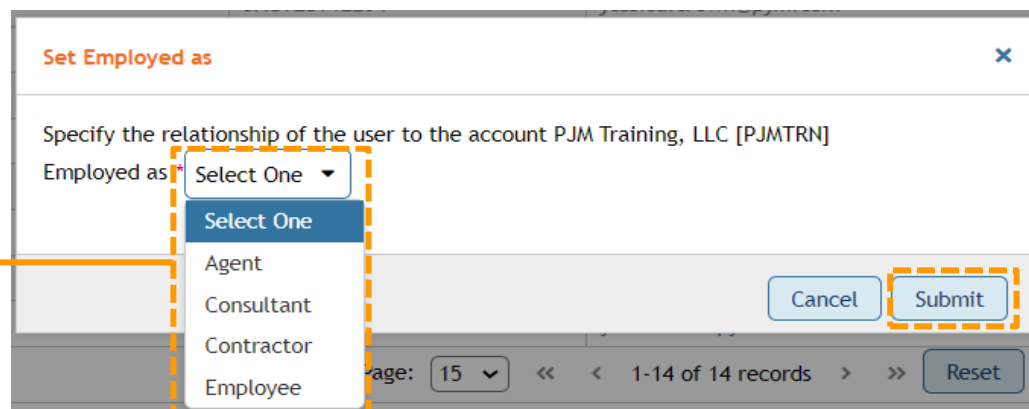
SUMA User Accounts

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.

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

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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.

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

Users	System Accounts

Actions	First Name ⇕	Last Name ⇕	Username ▲	Email ⇕	Employer ⇕	Employed as ⇕	Certification Date ⇕
☑ ✏ 🔍	Carter	Holliday	CHdemomrg7	carter.holliday@pjm.com	PJM DEMO Company 1 [DEMC	Employee	

Actions	Account ⇕	Certification Date ⇕
☑ 🔍	PJM DEMO Company 2 (SUB 2) [D2COS2]	

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.

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System Accounts Certification

> Pleas 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.

| 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 ⇕	Certification Date ⇕
✔ 🔍	Jackson	Copenhagen	JACTESTSYS	jc@pjm.com	PJM DEMO Company 1 [DEMCO1]	
✔ 🔍	Jac	Fraggles	JACTEST0987	dm2ops@pjm.com	PJM DEMO Company 2 [DEMCO2]	
❯ ✔ 🔍	Jill	Hansen	JillHansen	Jhansen@pjm.com	PJM DEMO Company 2 [DEMCO2]	