

Whitelist Quick Guide



June 2021

Table of Contents

Whitelist Overview	1
Who Can Add/Maintain Company Whitelist(s)	1
Important Tips for Whitelisting	2
Getting Started	3
How to Whitelist as a CAM for a Single Company Account.....	3
How to Whitelist as a SUMA CAM	4
Non-Compliant User List.....	7
How to Delete Whitelist Entries	8

Whitelist Overview

The whitelist feature enables Company Account Managers (CAMs) to create a list of email addresses or company domains allowed to associate with new user accounts for the company account(s) they manage.

By default, whitelists will be empty for all companies until email addresses or domains are added by the CAMs. For security purposes, PJM requires all CAMs and SUMA CAMs to maintain whitelists for the companies they manage.

For added security, once a whitelist is created, individuals are restricted from creating a new user account for that company if their credentials do not match the specified account whitelist(s).

Who Can Add/Maintain Company Whitelist(s)

- Single-account CAMs are able to add a whitelist for the company account that they manage.
- SUMA CAMs are able to add a whitelist for all company accounts that they manage.

Important Tips for Whitelisting

- **DO NOT** add public email domains such as “gmail.com,” “yahoo.com,” etc. to a whitelist. Any user with an email address from one of these domains would then be able to create an account under that company. If an authorized user has this category of email address, whitelist the exact authorized email address in the Email Prefix and Domain fields.
- When adding agents or consultants, add the exact authorized email address for each user in the Email Prefix and Domain fields.

Adding just a domain means any user – authorized or not – with an email address on that domain can create a user account for your company account(s).

- If a company domain changes, you must update the whitelist prior to updating the email address in the associated user profile.
- Keep whitelists up to date. Delete email addresses or email domains that are no longer needed.
- When entering a domain, **DO NOT** add the “@”symbol prior to the domain. That will generate the following error:

The screenshot shows a web application interface with a navigation bar at the top containing 'Pending Tasks', 'Add New User', 'User Profile', 'My Company', and 'Search'. Below the navigation bar is a sub-menu with 'Access', 'Account Managers', 'History', and 'Whitelist'. A red error message is displayed in a dashed orange box, stating: 'Error: "Please enter a valid domain entry. Allowed characters are -.A-Za-z0-9"'. Below the error message is a form titled 'Whitelist Emails' with two input fields: 'Email Prefix' and 'Domain *'. The 'Domain *' field contains '@pjm.com'. There are 'Add' and 'Clear' buttons next to the 'Domain *' field.

Whitelist Quick Guide

Getting Started

For all whitelist actions, sign in to your CAM or SUMA CAM user account and click the “**My Company**” tab, then click the “**Whitelist**” subtab.

How to Whitelist as a CAM for a Single Company Account

1. Fill in the complete email address in the Email Prefix and Domain fields to authorize specific users, or just the Domain field to allow any user from that company domain to create a user account

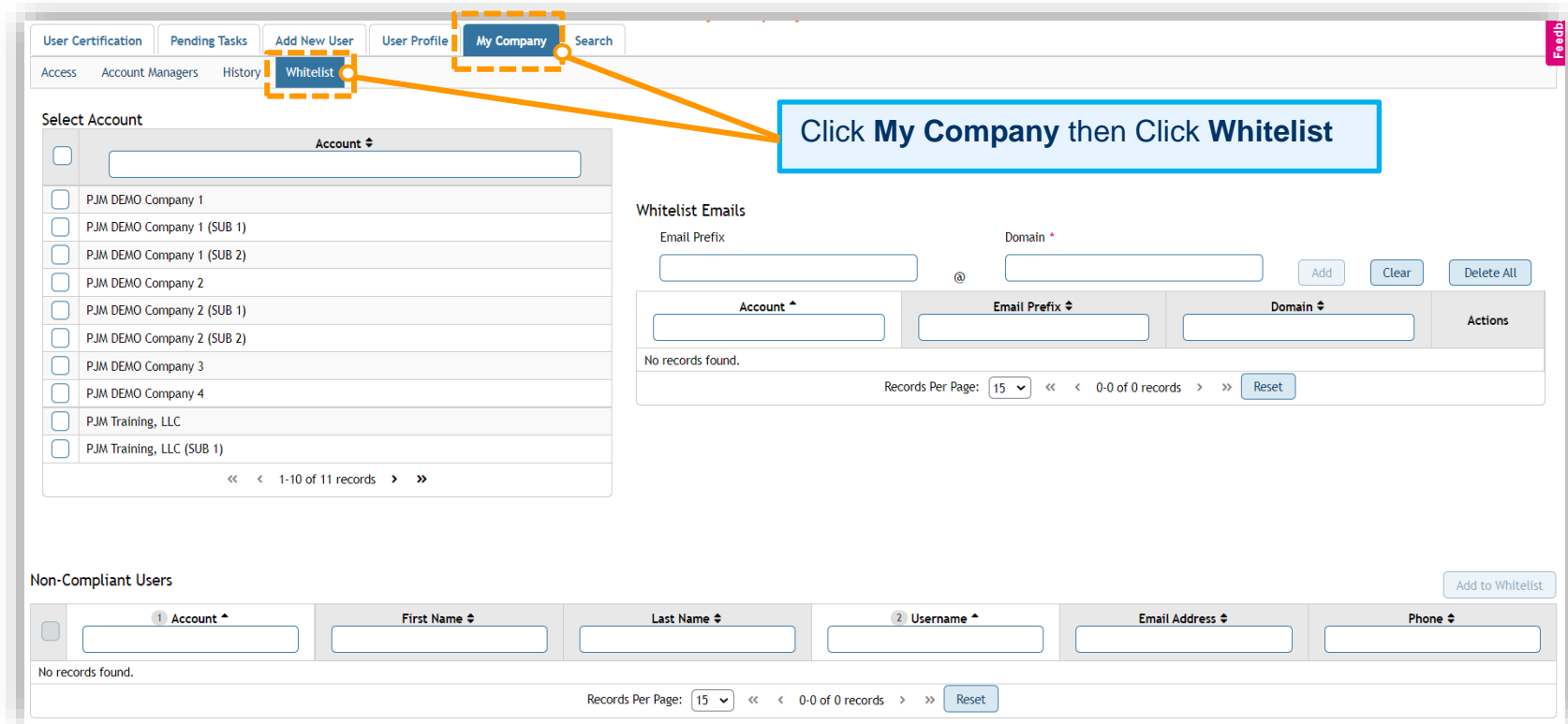
2. Click Add

Account ^	Email Prefix ⇅	Domain ⇅	Actions
PJM Training (Subaccount 1)		@pjmtest.com	
PJM Training (Subaccount 1)	pjmtst	@pjmtrn.com	
PJM Training (Subaccount 1)		@pjm.com	
PJM Training (Subaccount 1)	sonso	@gmail.com	

Records Per Page: 15 << < 1-4 of 4 records > >> Reset

Repeat Steps 1 and 2 for each additional whitelist entry.

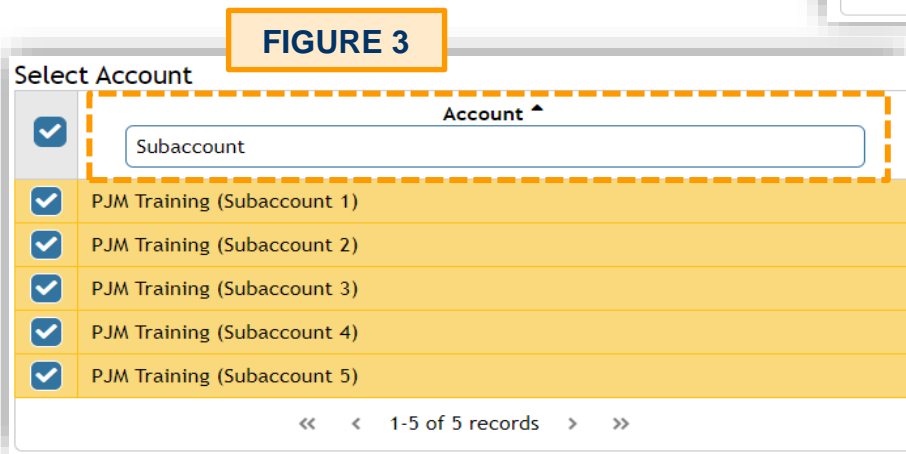
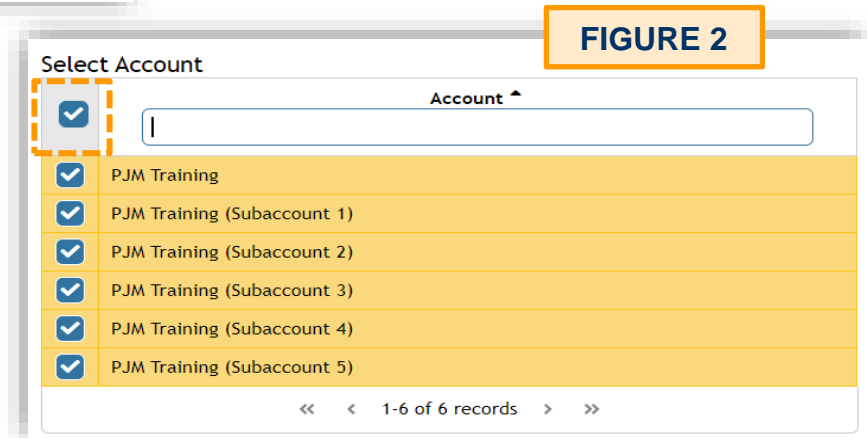
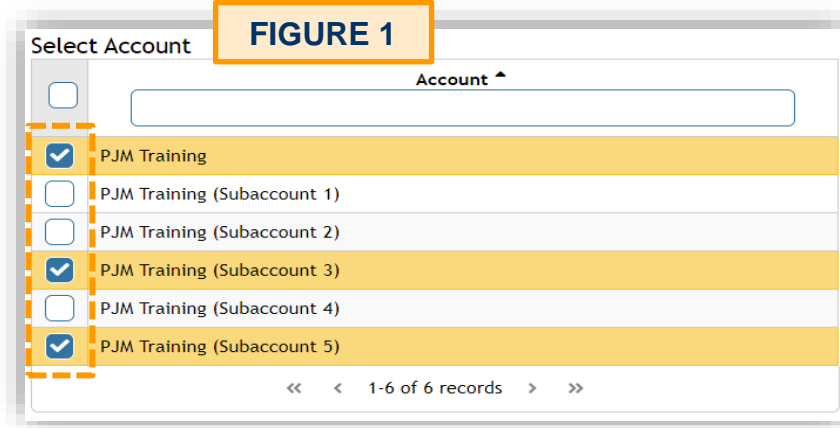
How to Whitelist as a SUMA CAM



SELECT ACCOUNT BOXES

Use the checkboxes to select one or more accounts (**FIGURE 1**) or all accounts (**FIGURE 2**). Use the Account Name box to filter Accounts by name (**FIGURE 3**)

Whitelist Quick Guide



Whitelist Quick Guide

1. Fill in the complete email address in the **Email Prefix and Domain** fields to authorize specific users, or **just the Domain** field to allow any user from that company domain to create a user account.

The screenshot shows the 'Whitelist Emails' interface. At the top, there are navigation tabs: 'Pending Tasks', 'Add New User', 'User Profile', 'My Company', and 'Search'. Below these are sub-tabs: 'Access', 'Account Managers', 'History', and 'Whitelist'. The 'Whitelist Emails' section contains a form with two input fields: 'Email Prefix' and 'Domain *'. The 'Domain *' field contains 'pjm.com'. To the right of the form are 'Add' and 'Clear' buttons. A dashed orange box highlights the 'Email Prefix' and 'Domain *' fields, with a callout box pointing to it containing step 1. Another dashed orange box highlights the 'Add' button, with a callout box pointing to it containing step 2. Below the form is a table with columns: 'Account', 'Email Prefix', 'Domain', and 'Actions'. The table contains four rows of data. At the bottom of the table, there is a 'Records Per Page' dropdown set to '15', navigation arrows, and a 'Reset' button.

Account	Email Prefix	Domain	Actions
PJM Training (Subaccount 1)		@pjmtest.com	
PJM Training (Subaccount 1)	pjmtst	@pjmrn.com	
PJM Training (Subaccount 1)		@pjm.com	
PJM Training (Subaccount 1)	sonso	@gmail.com	

Select additional company accounts as needed, and then repeat Steps 1 and 2 for each additional Whitelist Email entry.

Non-Compliant User List

After you add your whitelist entries, you may notice a list appear under the Non-Compliant Users section. These user accounts were created prior to a CAM adding a whitelist entry and do not match the current whitelisted domains. These user accounts will remain active and retain access to the tools that were previously provisioned to their account.

1. Please review all **Non-Compliant Users**.
2. Please terminate any user account(s) that are not currently affiliated with the company or no longer applicable.
3. If the user account(s) are currently affiliated with your company, you can either add their domain to the whitelist by following the steps above or select one, multiple, or all entries from the Non-Complaint Users list to add their specific email addresses to the whitelist (See Below).

The screenshot shows a table titled "Non-Compliant Users" with columns for Account, First Name, Last Name, Username, Email Address, and Phone. A callout box points to the top-left checkbox, stating "Click this white box to select all users from the list". Another callout box points to the "Add to Whitelist" button, stating "Click Add to Whitelist". A third callout box points to the individual checkboxes in the first column, stating "Click 1 or more boxes to select individual users".

Account	First Name	Last Name	Username	Email Address	Phone
<input type="checkbox"/>					
<input type="checkbox"/> PJM Training, LLC	Rooney	McMurphy	OTH352ZDEMO	r.mcmurph@gmail.com	610-555-1212
<input type="checkbox"/> PJM DEMO Company 1	Lucas	Mahomes	LMPJMTESTER	lmahomes@pjm.com	610-666-5555
<input type="checkbox"/> PJM DEMO Company 1	Mike	Koch	MKMERGE	mikekoch@pjm.com	610-555-1212
<input type="checkbox"/> PJM DEMO Company 1	Riley	Voxhall	RVdemoMrg14	riley.voxhall@pjm.com	610-555-1212

How to Delete Whitelist Entries

1. SUMA CAMs > Select Account(s)
(CAMs proceed to Step 3)

Select Account

Account ^

- PJM Training
- PJM Training (Subaccount 1)
- PJM Training (Subaccount 2)
- PJM Training (Subaccount 3)
- PJM Training (Subaccount 4)
- PJM Training (Subaccount 5)

« < 1-6 of 6 records > »

2. Filter the Whitelist Emails box by account, email prefix or domain

Whitelist Emails

Email Prefix

Domain *

Add Clear

Account ^	Email Prefix ^	Domain ^	Actions
PJM Training	sonso	@gmail.com	
PJM Training (Subaccount 1)	sonso	@gmail.com	
PJM Training (Subaccount 2)	sonso	@gmail.com	
PJM Training (Subaccount 3)	sonso	@gmail.com	
PJM Training (Subaccount 5)	sonso	@gmail.com	

Records Per Page: 15 « < 1-5 of 5 records > » Reset

3. Click the trash can icon in the Actions column next to the email address or domain you need to delete

4. Click Submit in the pop-up box to finalize

Delete Whitelist Email

Are you sure you want to remove **sonso@gmail.com** from the whitelist?

Cancel Submit

Whitelist Quick Guide

- Repeat these steps as needed if you have additional email addresses or domains to delete.
- If you need to delete all or many of the whitelist list entries, you can select the account(s) this action applies to.
 - Select Accounts (All - single white box top left corner or individually white boxes before account name)
 - Filter the Whitelist Emails box by account, email prefix or domain as needed
 - Click the Delete All button

The screenshot shows the 'Whitelist Emails' interface. On the left, a 'Select Account' list has three items selected: 'PJM DEMO Company 2', 'PJM DEMO Company 2 (SUB 1)', and 'PJM DEMO Company 2 (SUB 2)'. Callout 'A' points to the checkboxes in this list. The main area has filters for 'Email Prefix' and 'Domain'. Callout 'B' points to the 'Account' dropdown in the filter section. A 'Delete All' button is highlighted with a red dashed box and callout 'C'. Below the filters is a table with three rows of email entries, each with a trash icon in the 'Actions' column. At the bottom, there is a 'Records Per Page' dropdown set to 15 and a 'Reset' button.

The screenshot shows a confirmation pop-up box titled 'Delete Whitelist Emails'. It contains a warning icon and the text 'Are you sure you want to delete all whitelist emails?'. At the bottom, there are two buttons: 'Yes' (with a checkmark icon) and 'No' (with an 'X' icon). Callout '7' points to the 'Yes' button.

7. Click **Yes** in the pop-up box to finalize