



Whitelist & SUMA Functionality

May 20, 2020
Tech Change Forum

- **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)**
 1. 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.**

My Company - PJM

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

Access Account Managers History Affiliates Subaccounts **Whitelist**

Email Prefix Domain ^{*}

Records Per Page: 15 0-0 of 0 records

Email Prefix	Domain	Actions
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No records found.

Records Per Page: 15 0-0 of 0 records

Non-complying Users

Records Per Page: 15 0-0 of 0 records

	First Name	Last Name	Username	Email Address	Phone
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No records found.

Records Per Page: 15 0-0 of 0 records

My Company - PJM

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

Access | Account Managers | History | Affiliates | Subaccounts | **Whitelist**

Email Prefix @

Records Per Page: 15 | 0-0 of 0 records

Email Prefix	Domain	Actions
No records found.		

Records Per Page: 15 | 0-0 of 0 records

Non-complying Users

Records Per Page: 15 | 0-0 of 0 records

<input type="checkbox"/>	First Name	Last Name	Username	Email Address	Phone
No records found.					

Records Per Page: 15 | 0-0 of 0 records

My Company - PJM

- Pending Tasks
- Add New User
- User Profile
- My Company**
- Search

- Access
- Account Managers
- History
- Affiliates
- Subaccounts
- Whitelist**

Email Prefix Domain * @

Records Per Page: 15 1-1 of 1 records

Email Prefix	Domain	Actions
<input type="text"/>	<input type="text"/>	<input type="button" value="Edit"/> <input type="button" value="Delete"/>

Records Per Page: 15 1-1 of 1 records

Non-complying Users

Records Per Page: 15 1-15 of 1065 records

<input type="checkbox"/>	First Name	Last Name	Username	Email Address	Phone
<input type="checkbox"/>	Delete	Me	deleteme13	test@bit-bucket.pjm.com	1234567890
<input type="checkbox"/>	Joey	Tribiani	tribiani123	test@bit-bucket.pjm.com	2151112222
<input type="checkbox"/>	Samantha	Smith	sunshine321	test@bit-bucket.pjm.com	111-222-3333
<input type="checkbox"/>	Gertrude	Hawk	grandma	test@bit-bucket.pjm.com	777-888-9999

- 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
3. 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

1.

pjm | Account Manager

User Profile - mb_user22

User Profile | Profile Information | Account Access

Account Access

Below are the accounts and tools access that are currently on the account.

Request Access

Account ID	Account	Account Shortname
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2.

pjm | Account Manager

User Profile - stg_user9

User Profile | Profile Information | Account Access

Account Access

Below are the accounts and tools access that are currently on the account.

Request Access

Account ID	Account	Account Shortname
3	PECO Energy Company	PE

Tool	Access Type	Effective Date	Terminate Date	Actions
Account Manager	Read/Write	10/18/2017	01/12/2018	

3.

pjm | Account Manager

Request Access - testuser1

Request Access

Account: PJM TEST

Access

- Bulletin Board Read Only
- Bulletin Board Read/Write
- Data Miner 2 API
- Data Viewer Read/Write
- DR Hub Read Only
- DR Hub Read/Write
- eCredit Cash Management Read Only

Selected Access

4.

5.

6.

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

- Whitelist Guidance - <https://pjm.com/-/media/etools/account-manager/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