CAM On-Boarding Quick Start Guide

March 2022

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Overview

This PJM CAM On-Boarding Quick Start Guide will provide instructions and information for new user registration, user account management and Company Account Manager (CAM) Administrator user account management in the PJM Account Manager Internet application.

As a designated CAM Administrator, you will be responsible for the management of users under your company account(s) in the Account Manager production and training environments. This may include, but is not limited to, the following actions:

- Verifying and approving new user accounts

- Providing and/or approving tools/access for users

- Setting up new user accounts/updating information in existing accounts

- Locking/unlocking accounts

- Resetting passwords

- Terminating user accounts

- Submitting eDART user requests/approving new user accounts

- Creating/maintaining [Allowlist(s)](#)

- Requesting additional tool access based on the user's company or line of business
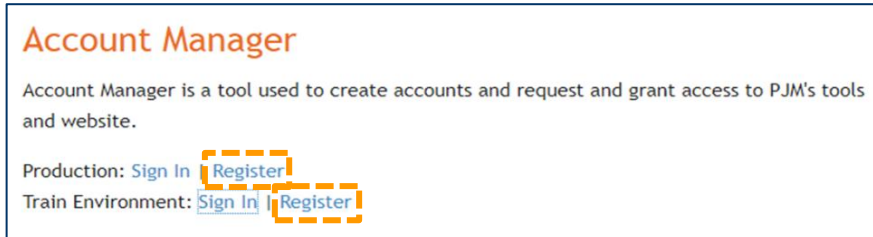
How to Access Account Manager

> Account Manager can be accessed from PJM's Account Manager Page: pjm.com **Home > Markets & Operations > PJM Tools > Account Manager**.

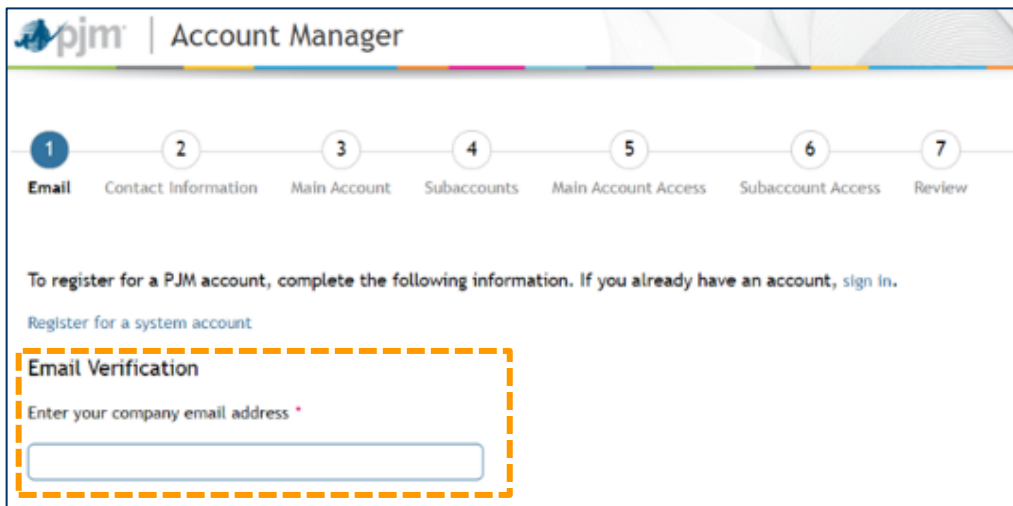CAMs and users can register for an account or sign in to an existing user account here.

Register for a New PJM User Account

1. Click **Register** for the appropriate environment in which you require a user account

2. Type in company email address and click **Next.**

3. Select a username, add the required contact information, then select and answer three security questions. Click **Next** [Next] to continue.

> **Note:** If a user account is already associated with the email address you entered on the first screen, a warning will appear under the email address. This warning will not prevent you from creating a new user account; however, if you have an existing user account, please log in to that user account.

4. In the **Employed as** section, select the option that best describes your relationship to the main company account.

5. Select the main company account and click **Next**. Next

6. If the main company account has subaccounts, it will proceed to the *Subaccount(s) Selection* screen (Figure 1). If the main company account has no subaccounts, it will proceed to the *Tools Selector* screen (Figure 2).

    a. On the *Subaccount(s) Selection* screen, you can select one subaccount, multiple subaccounts or all subaccounts. Click **Next**. Next

7. Assign tool access for the main account by selecting the tool name under *Access* then clicking the center **double-arrow** icon to add (Figure 2). Click **Next**. Next

Main Account Selection

Employed as *

Employee

	Main Member Account ⬍
⦿	PJM DEMO Company 1 [DEMCO1]
◯	PJM DEMO Company 2 [DEMCO2]
◯	PJM DEMO Company 3 [DEMCO3]

Figure 1

Subaccount(s) Selection

Select the subaccounts you would like associated with your main member account below.

	Subaccounts ⬍
☐	
☐	PJM Training, LLC (SUB 1) [PTSUB1]
☐	PJM Training, LLC (SUB 2) [PTSUB2]
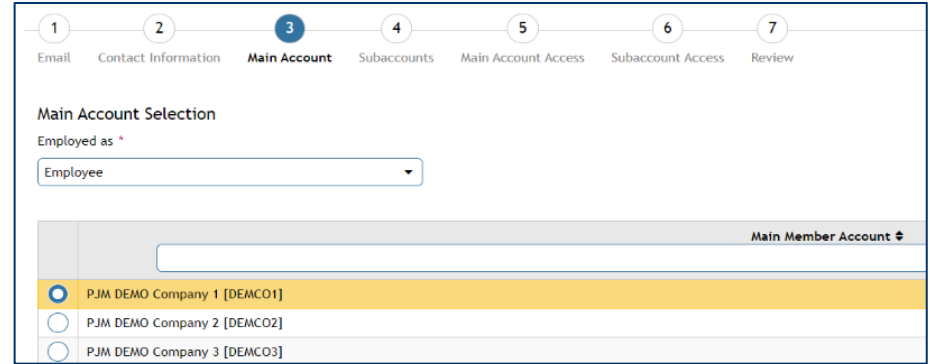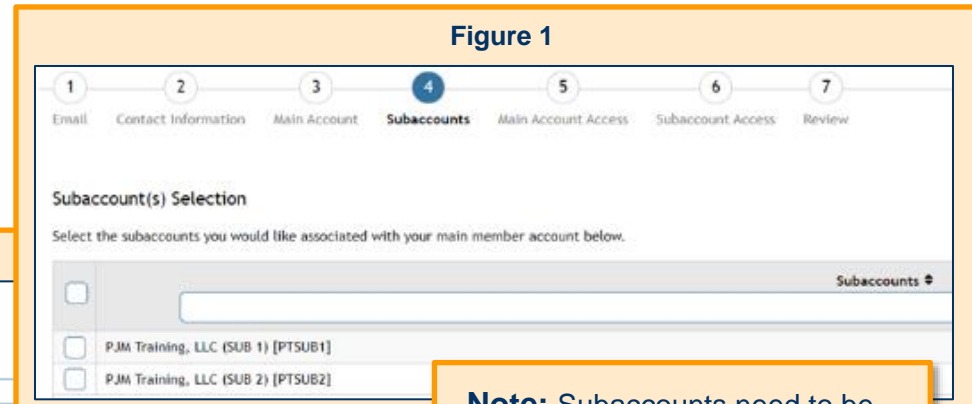
Note: Subaccounts need to be Allowlisted to appear on the *Subaccount(s) Selection* screen.

Figure 2
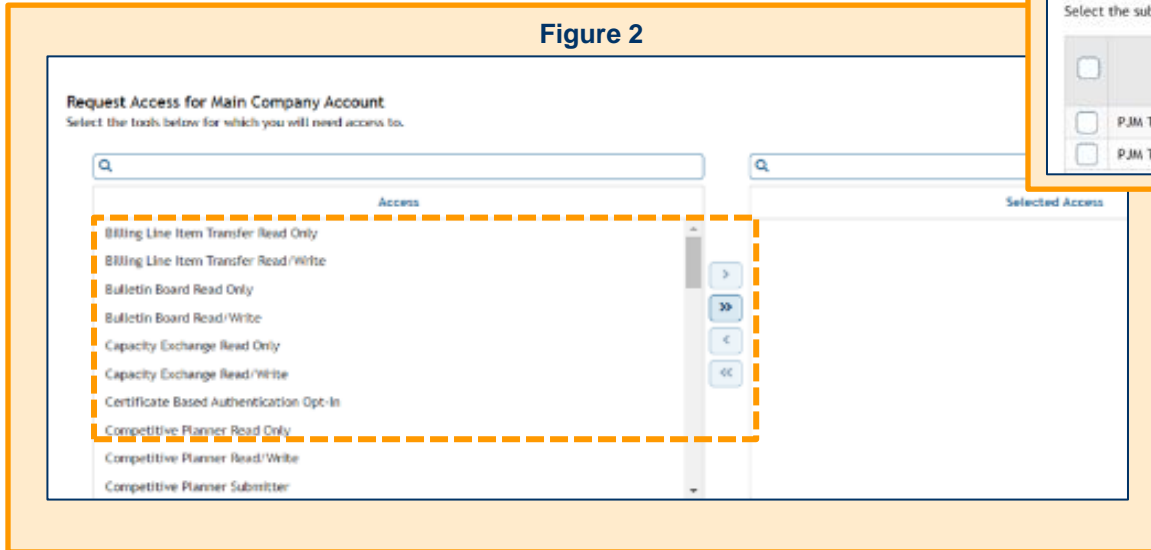
Request Access for Main Company Account
Select the tools below for which you will need access to.

Access
- Billing Line Item Transfer Read Only
- Billing Line Item Transfer Read/Write
- Bulletin Board Read Only
- Bulletin Board Read/Write
- Capacity Exchange Read Only
- Capacity Exchange Read/Write
- Certificate Based Authentication Opt-In
- Competitive Planner Read Only
- Competitive Planner Read/Write
- Competitive Planner Submitter

Selected Access

8. Select tool access for the subaccounts. Click the **pencil** icon in the *Actions* column for the subaccount.
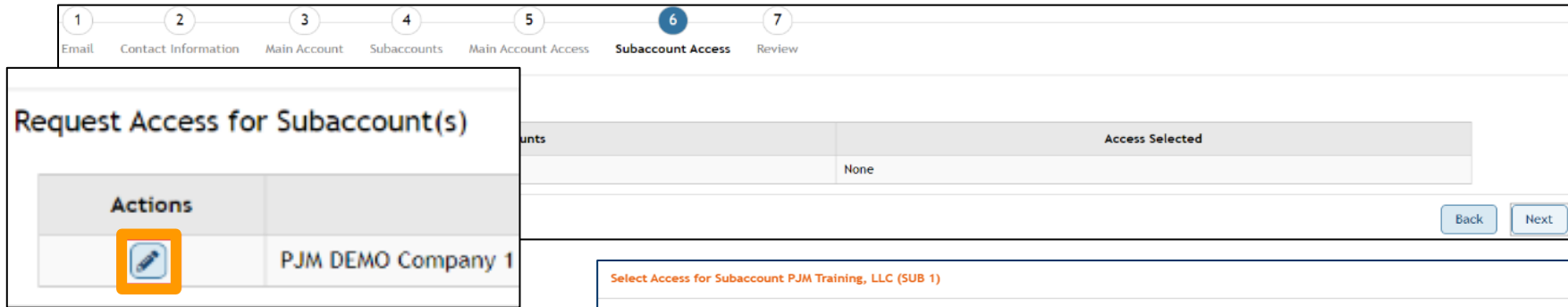
9. Select tool access (Only SUMA-enabled tools will be available to select for each subaccount). Click **Submit**.

Repeat steps 8 & 9 for each selected subaccount.

10. On the *Request Access for Subaccount* screen, you can review the access selected for each subaccount. If you missed any tools, click the **Back** button. Follow the previous steps to select additional tools. Complete access selection and click **Next**.
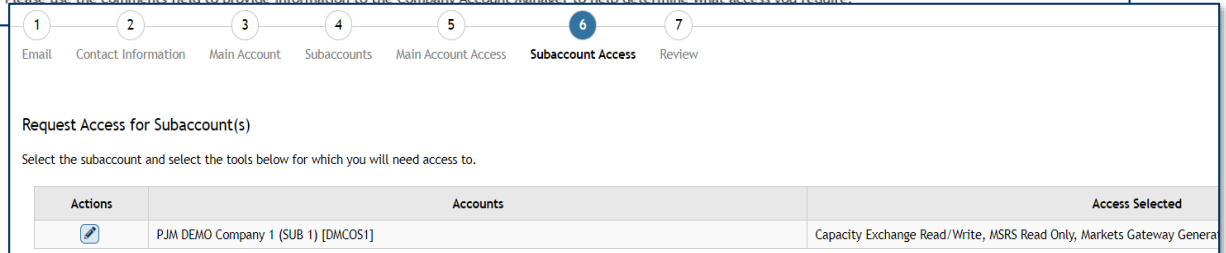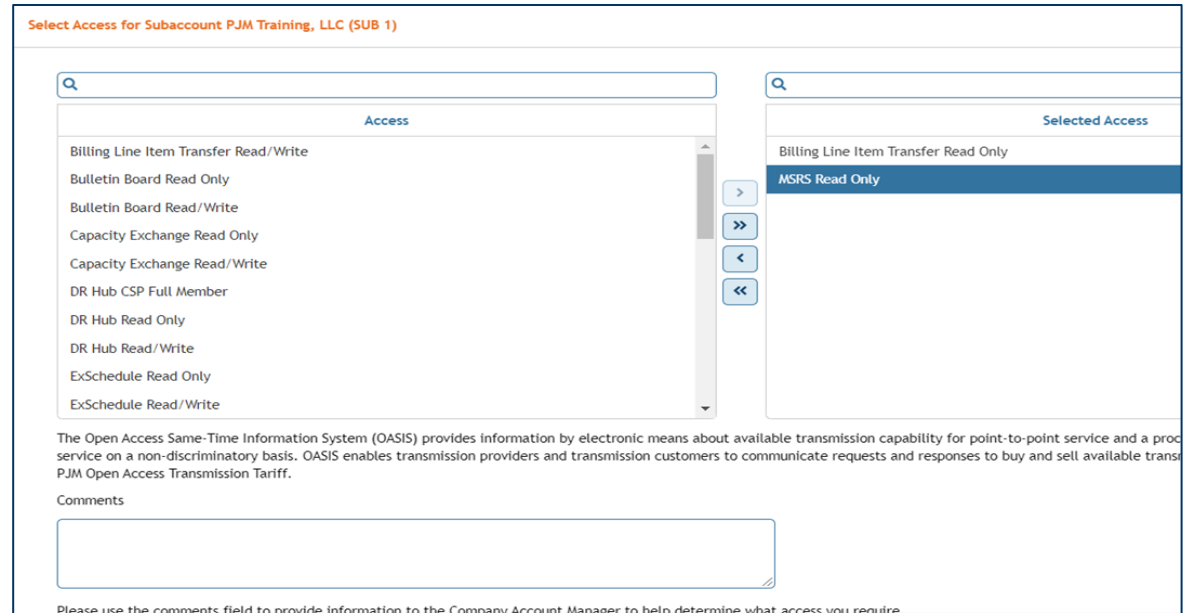
11. Review the company account(s) and accesses being granted to the new user account. Click **Submit** to finalize the request.
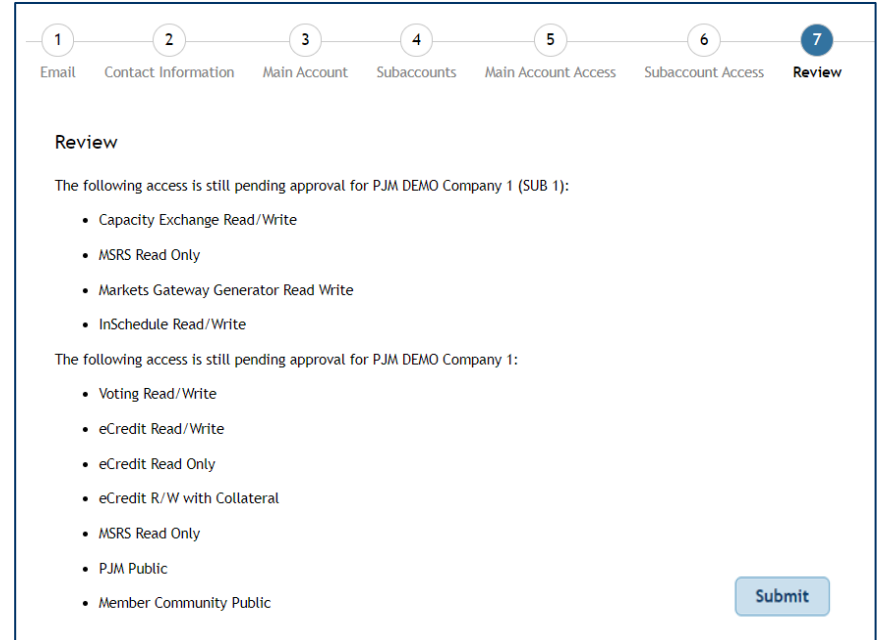
As a CAM Administrator, you will receive the following confirmation screen. The user will then receive an automated email with a link to set up their password. **Please note that the link expires four hours after issuance**. If the link expires, as a CAM Administrator you will need to issue the user a password reset.
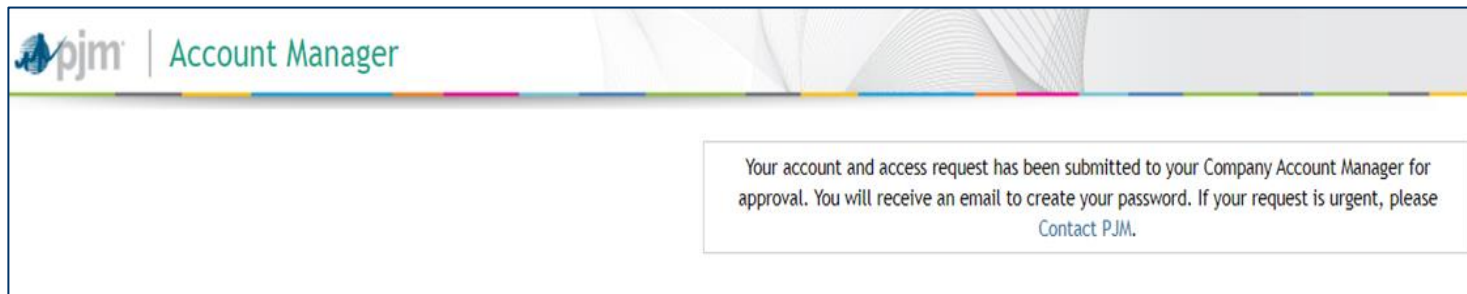
New User Account Notification

When a new user creates an account under your company account(s), you will receive an email notification.
Review the user information and access requested.

APPROVE OR DENY ACCESS

From your Account Manager CAM home screen, you will need to navigate to your **Pending Tasks** tab.

Tool access requested by new users or an existing user requesting additional access will appear in your **Pending Tasks** tab under **User Access Requests**. Although you will receive email notifications of pending access requests, a best practice is to check this tab frequently for incoming user requests.

Email notification showing:

Fri 6/12/2020 1:16 PM
Account Manager <accountmanager-donotreply@pjm.com>
Account Manager - Access Request Notification
To CAMs Email Address(es)
This message was sent with High importance.

Hello,

You are listed as a CAM for the following Accounts:

- Company Name Here

A new account/access request has been created for First and Last Name (**Username**).
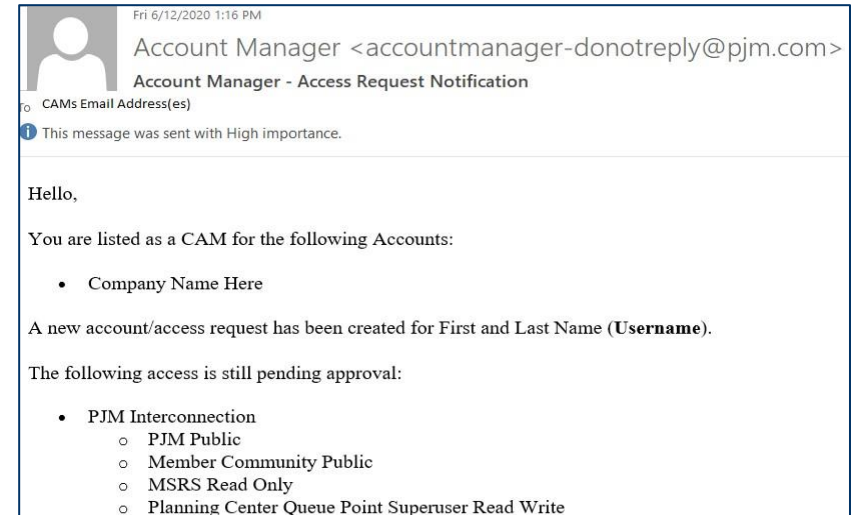
The following access is still pending approval:

- PJM Interconnection
  - PJM Public
  - Member Community Public
  - MSRS Read Only
  - Planning Center Queue Point Superuser Read Write

Pending Tasks table screenshot with columns: First Name, Last Name, Username, Email, Phone, Employer, Actions

First Name	Last Name	Username	Email	Phone	Employer	Actions
Ally	Electric	AEHybridTRN	aelectric@pjm.com	610-666-4545	PJM DEMO Company 2 [DEMCO2]	
Carter	Holliday	CHOLLIDAY123	carter.holliday@pjm.com	610-555-1212	PJM DEMO Company 1 [DEMCO1]	
Carter	Holliday	cholliday12	cholliday@pjm.com	610-555-1212	PJM DEMO Company 1 [DEMCO1]	
Carter	Holliday	CHdemomrg7	carter.holliday@pjm.com	610-555-1212	PJM DEMO Company 1 [DEMCO1]	

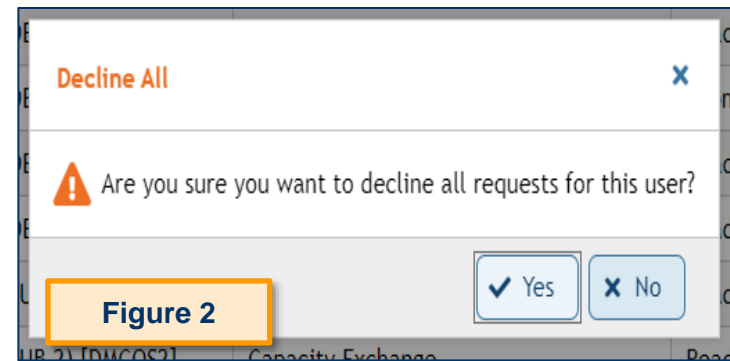Records Per Page: 15   1-4 of 4 records   Reset

1. All requests generated by a single user will be grouped together under their username.

2. To view all access requested by a user, click the drop-down **arrow** in the first column.

3. To approve requests individually, click the **check mark** in the *Actions* column. To approve all of a user's requests, click the **check mark** in the yellow banner. When approving all requests for a user, a pop-up box will ask you to confirm the action. Click as appropriate**.**
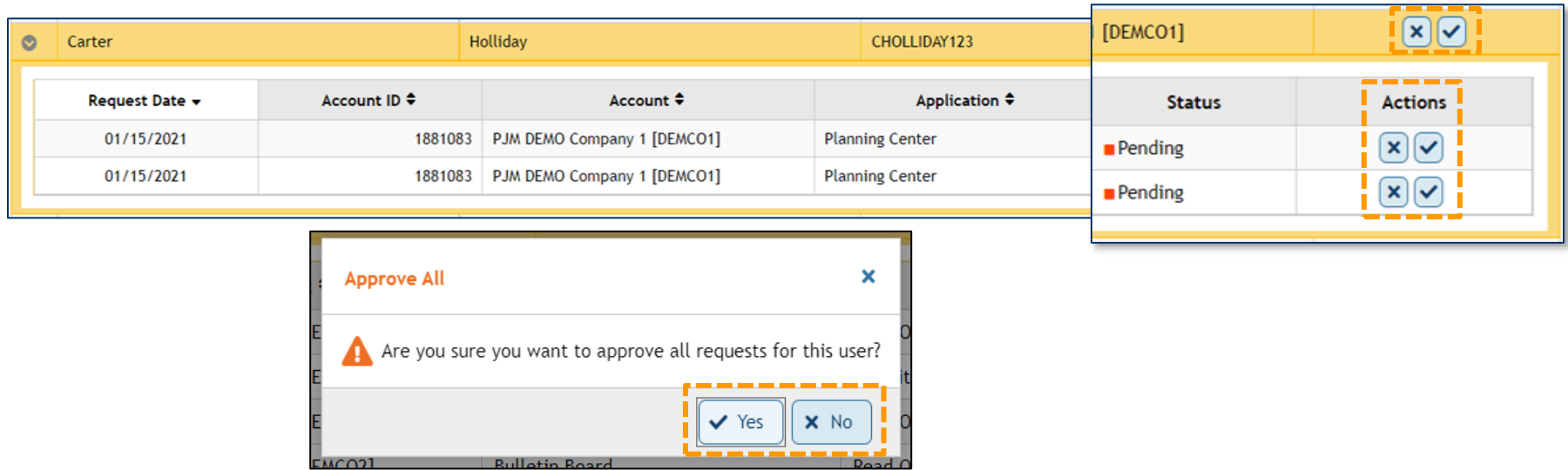
4. To decline requests individually, click the **X** in the *Actions* column. For a declined request (Figure 1), enter an explanation in the pop-up box. Click **Submit**. To decline all of a user's requests, click the **X** button in the yellow banner, then confirm the action in the pop-up warning box (Figure 2).

Figure 1

Figure 2
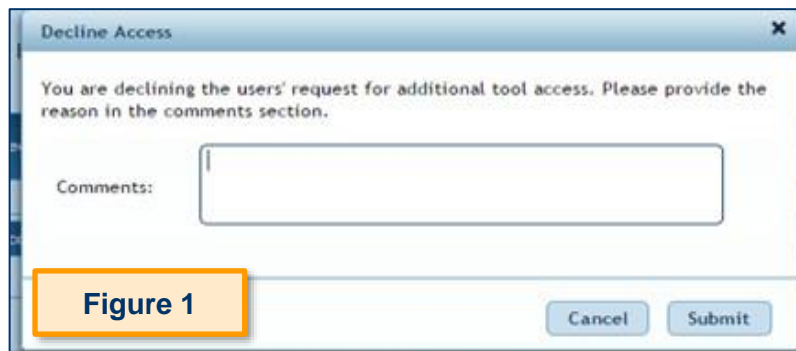
How to Create a New User Account

1. Click **Add New User** > **PJM Account**

Note: To create a System ID account, click **System Account** instead of PJM Account and follow the prompts.

2. In the **Email** field, type in the user's email address. Click **Next**. If the entered email address is not [Allowlisted](#) or already has an existing user account, you will receive an error warning (see below).

ERROR MESSAGE: EMAIL ADDRESS IS NOT ALLOWLISTED

CAMs can only create a new user for the accounts they manage, and the accounts will be limited to Allowlisted domains. The error warning is displayed if a non-Allowlisted email domain is entered. The CAM will need to add the email domain to the Allowlists for the main company and any subaccounts (if applicable) before they can proceed.
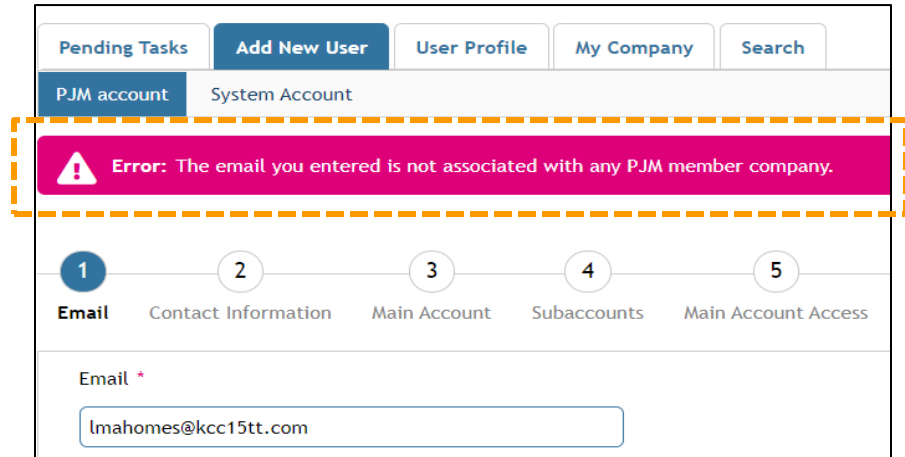
WARNING MESSAGE: EMAIL ADDRESS ALREADY EXISTS

If a user account already exists for the email address entered, the CAM Admin will see the following message: "Your email address is already associated with a PJM account." This should not prevent the CAM from creating another user account.
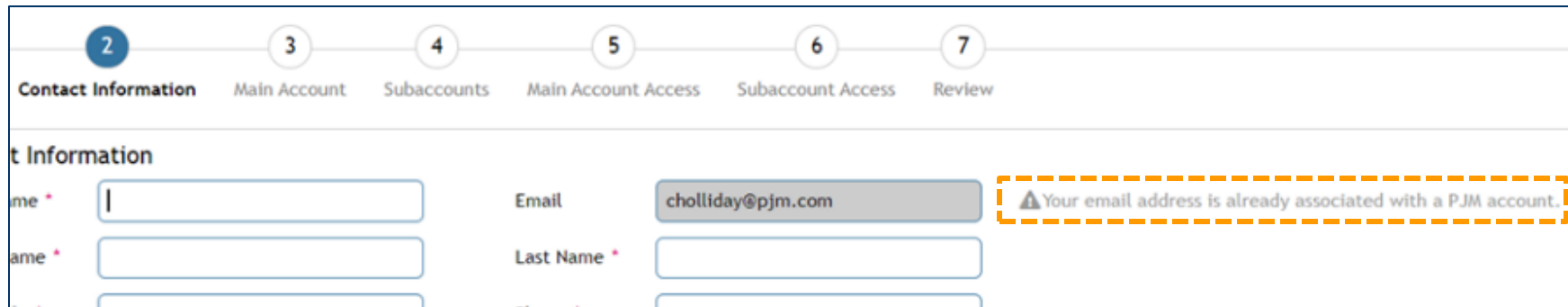
3. Fill in the user's contact information and click **Next**.

4. Select the user's relationship to the main company account in the **Employed as** field.

5. Select the main company account and click **Next**. Next

6. If the main company account has subaccounts, it will proceed to the *Subaccount(s) Selection* screen (Figure 1), or, if the main company account has no subaccounts, it will proceed to the *Tools Selector* screen (Figure 2).

   a. On the *Subaccount(s) Selection* screen (Figure 1), you can select one, multiple or all subaccounts. Click **Next**. Next

1	2	3	4	5	6	7
Email	Contact Information	**Main Account**	Subaccounts	Main Account Access	Subaccount Access	Review

Main Account Selection

Employed as *

Employee

		Account ▲
⦿	PJM DEMO Company 1 [DEMCO1]	
○	PJM DEMO Company 2 [DEMCO2]	
○	PJM DEMO Company 3 [DEMCO3]	
○	PJM DEMO Company 4 [DEMCO4]	

Figure 1

User Certification	Pending Tasks	**Add New User**	User Pr

PJM account	System Account

1	2	3	4
Email	Contact Information	Main Account	**Subaccounts**

Subaccount(s) Selection

☐		
☐	PJM DEMO Company 1 (SUB 1) [DMCOS1]	
☐	PJM DEMO Company 1 (SUB 2) [DMCOS2]	

Figure 2

1	2	3	4	5	6	7
Email	Contact Information	Main Account	Subaccounts	**Main Account Access**	Subaccount Access	Review

Request Access for Main Company Account

🔍   🔍

Access		Selected Access
Markets Gateway Administrator		PJM Public
Markets Gateway Generator Read Only		Member Community Public
Markets Gateway Generator Read Write	❯	MSRS Read Only
Markets Gateway Load Read Only	❯❯	
Markets Gateway Load Read Write	❮	
Planning Center Gen Model Read Only	❮❮	
Planning Center Gen Model Read Write		

7. If the main account has subaccounts (Figure 1 above), select the subaccount(s) and click **Next**. [Next]

8. Select tool access for the main account (Figure 2 above) and click **Next**.

9. To select tool access for the subaccounts, click the **pencil** icon in the *Actions* column for each subaccount. Select tool access and click **Submit**.

> **Note:** Only SUMA-enabled tools will be available to select for each subaccount. Repeat this step for each additional subaccount (See Figure 3: first subaccount and Figure 4: second subaccount.)

Figure 3

Figure 4
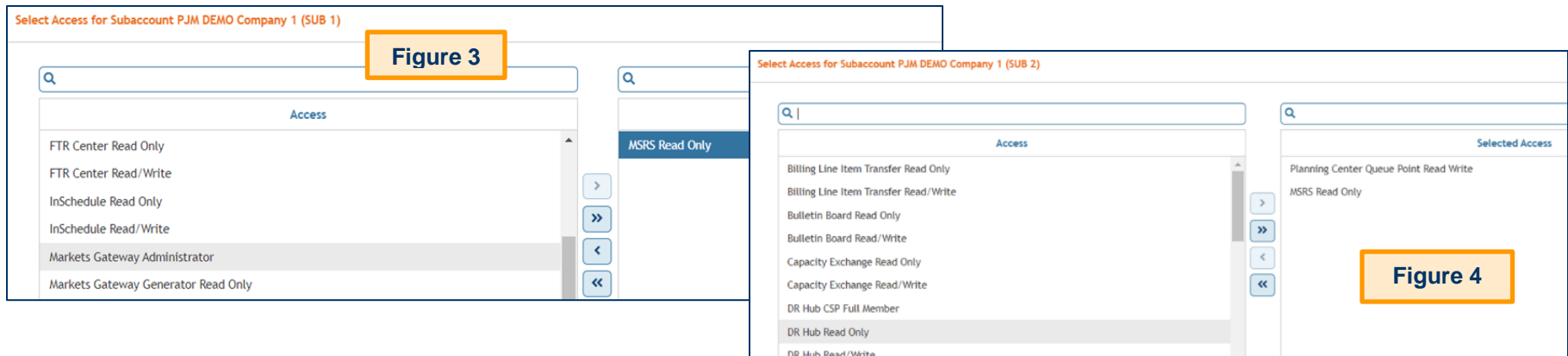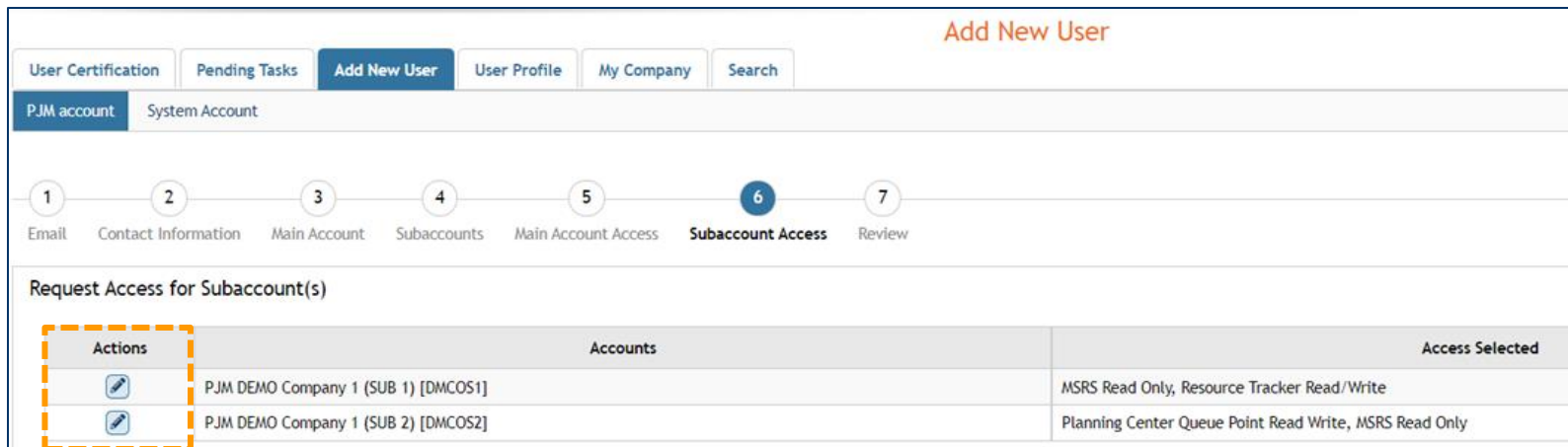
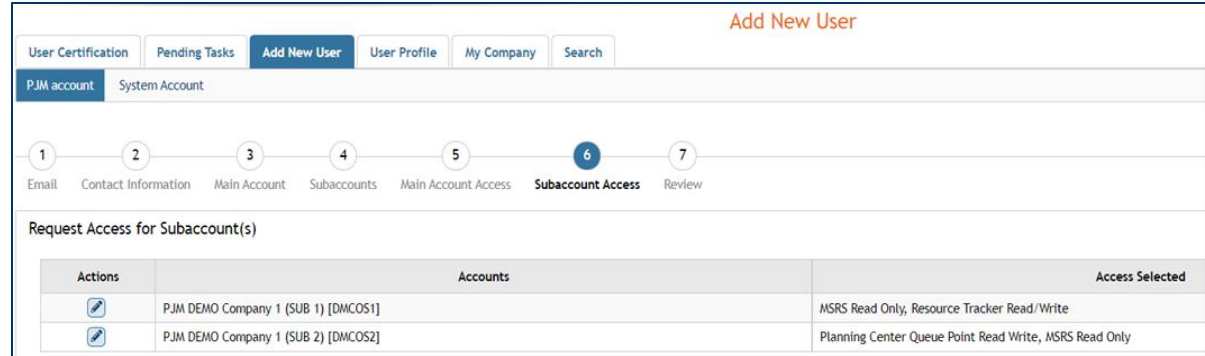10. On the *Request Access for Subaccount(s)* screen, you can review any tools selected for each subaccount. If you missed any tools, click the **Back** button and follow the previous steps to select additional tools. When you are finished selecting tool access, click **Next**. [Next]

11. On the final screen, review all accounts and tool accesses being granted to the new user account. Click **Submit** [Submit] to finalize this request.

12. After you submit the request, you will go back to the *Add New User* screen, and it will provide you a notice that the new user profile has been saved.

    a. The new user will receive an automated email containing a link to set up a password for their newly created user account.

    Note: The password setup link expires four hours after issuance.
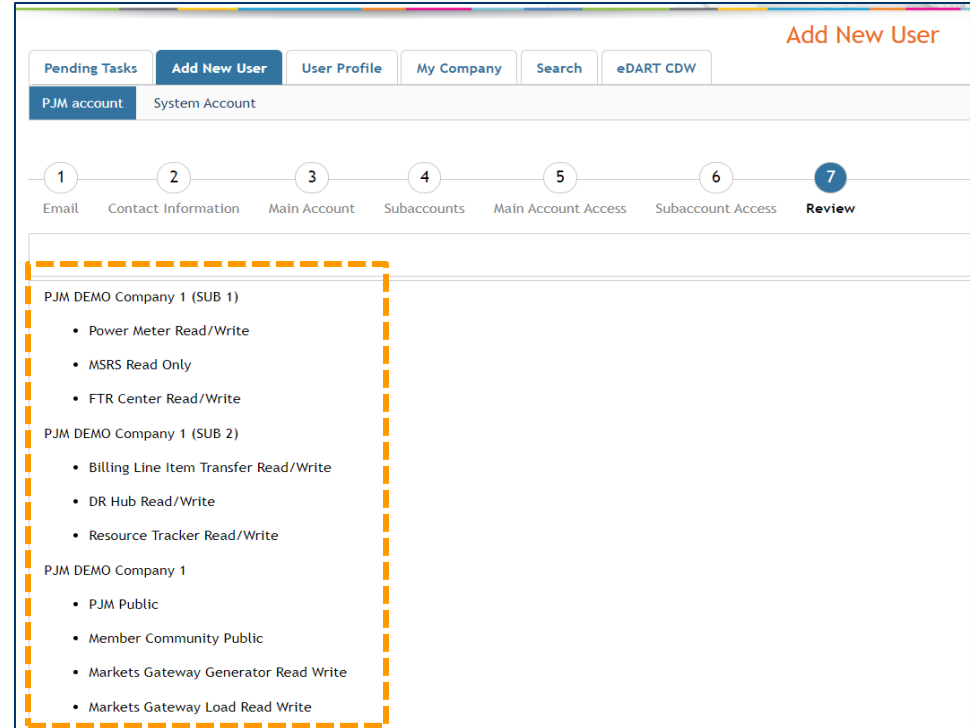
How to Search for a User

You can search for a user account if you have any or all of the following: the Account ID, Account Longname or Shortname, the user's first and/or last name, username, or email address.

SEARCH TIPS: ACCOUNT SHORTNAME, FIRST/LAST NAME

1. Make sure you are on the **Search** tab and **User Search** subtab.
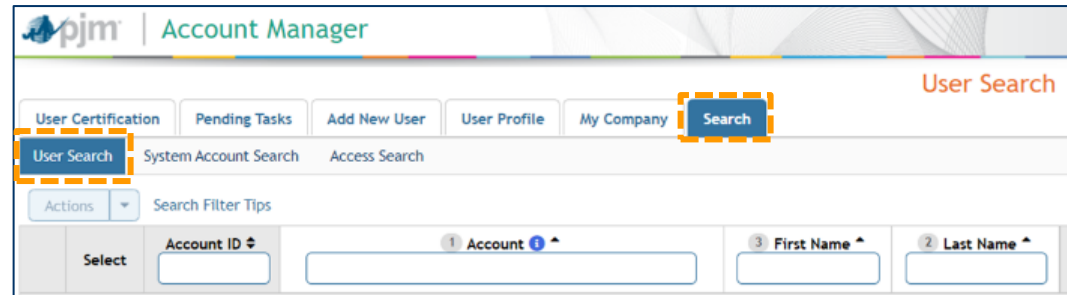
2. Use the **Active Users Only** drop-down menu to switch the view from **Active Only** (the default) to **Show All or Inactive Only**.
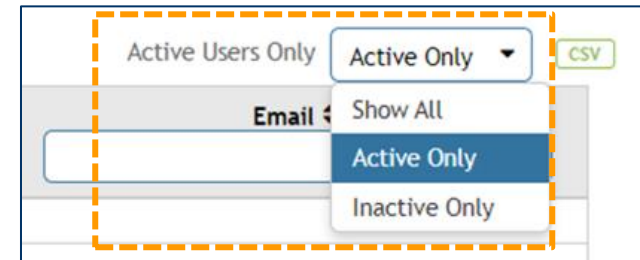
3. To search by Account Shortname, some examples to use are an asterisk and brackets: ***[Shortname]** or an asterisk before and after the ***Shortname***.
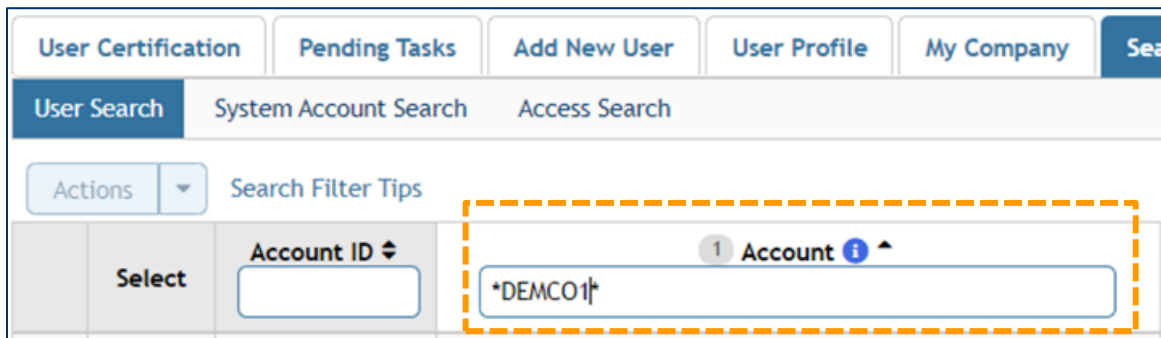
4. Use the **Name** fields to search by a user's first and/or last name. In the following examples, a CAM is searching for a user named "Danny Taro."

   a. Search by first name only with letters and an asterisk.

   b. Search by last name only with letters and an asterisk if needed.

CAM User Profile – Profile Information

1. On the **User Profile Information** page, CAMs can manage their contact and profile information. CAMs can update a job title, phone number and email address; however, the user's first name, last name, username, and employer cannot be edited. There is a **Last Name Change** button the Account Manager can select to request a last name change.

2. CAMs can also manage their account information. You will have the ability to change the account password by selecting the **Change Password** button.

3. As a CAM, if a user no longer requires access to PJM Tools, you can terminate their account by selecting the **Terminate account** checkbox and then click **Submit.** [Submit] After clicking submit, a pop-up box will ask you to confirm the action. Click as appropriate**.**
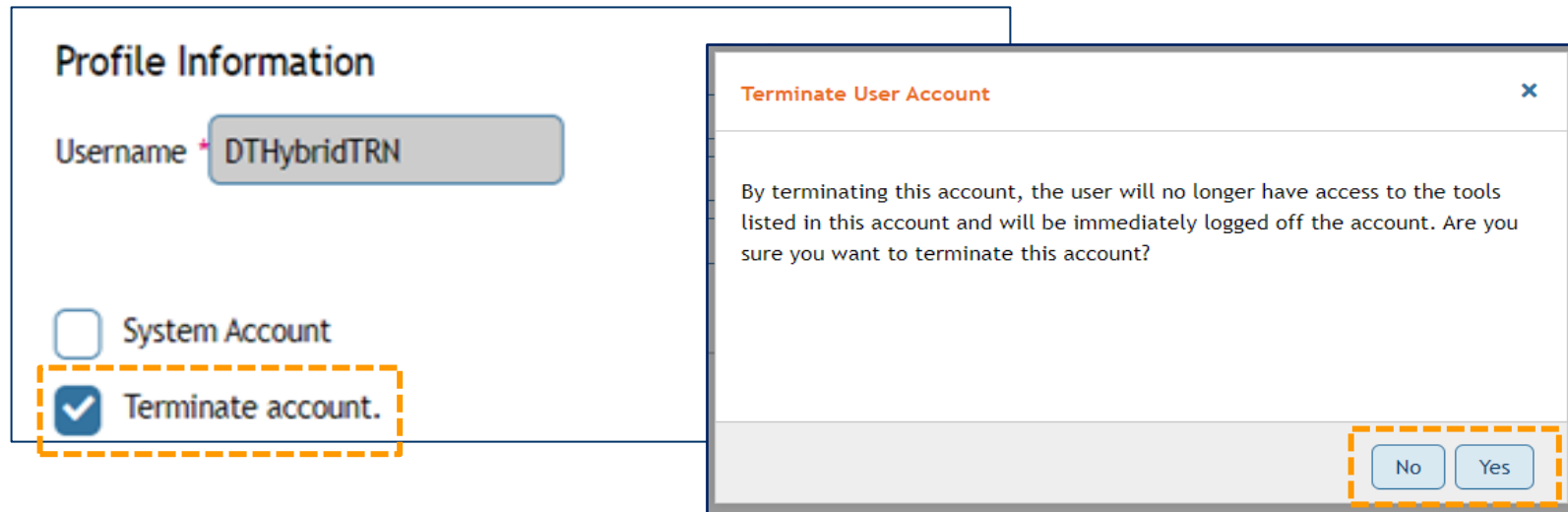
Actions: Lock, Unlock, Password Reset

LOCKING ACCOUNTS

User accounts may need to be locked if the user is on leave of absence for an extended period of time or for disciplinary reasons.
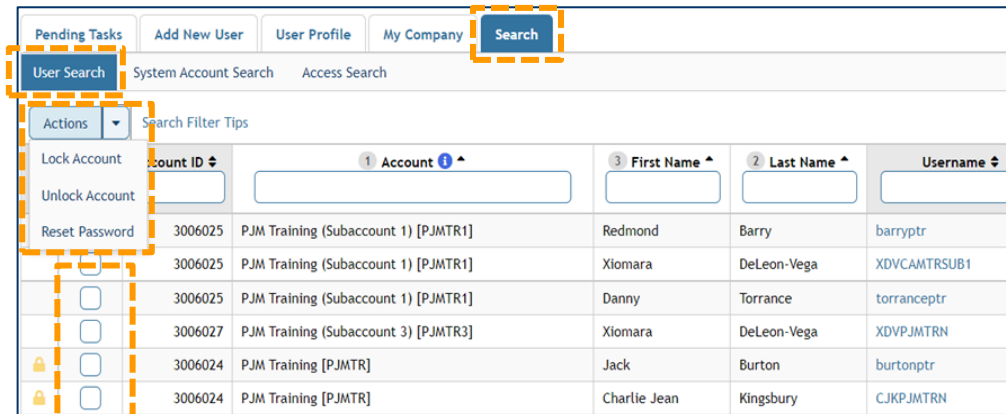
UNLOCKING ACCOUNTS

User accounts may need to be unlocked if the user failed to change their password or made three unsuccessful login attempts. This action must be completed before a password can be reset.

RESETTING A PASSWORD

User accounts may require a password reset if the user forgot their current password or is locked out due to an expired password. Users should contact their company CAMs to request password resets. Unlock the account first and then issue a password reset.

How to Use the Action Button to Lock/Unlock an Account or Reset a Password

1. Click **Search** tab.

2. Click **User Search** subtab.

3. Type in any combination of the **Account**, **Last Name**, **First Name**, **Email** or **Username** fields.

4. Hit **Enter**.

5. Click the **check box** to select the user record(s) to perform a single action.

6. Click the drop-down **arrow** on the **Actions** button and select **Lock Account, Unlock Account** (must be done before resetting a password) or **Reset Password**.

Note: When resetting a password, a system-generated email will be sent directly to the email address listed on the user's account.

ICON GLOSSARY

	Select	Account ID ⇕	Account ⓘ ⇕	First Name ⇕	Last Name ▲	Username ⇕	Acc
			*				
🔒	☐	3006025	PJM Training (Subaccount 1) [PJMTR1]	Redmond	Barry	barryptr	User
🔒	☐	*3006027*	*PJM Training (Subaccount 3) [PJMTR3]*	*Dave*	*Bowman*	*bowmanptr*	*User*
🔒	☐	3006024	PJM Training [PJMTR]	Jack	Burton	burtonptr	SUMA
	☐	2214	PJM TEST [PJMTST]	Jes	Crow	*bowmanp*	SUMA CAM
	☐	3006027	PJM Training (Subaccount 3) [PJMTR3]	Xiomara	DeLeon-Vega	XDVPJMTRN	SUMA

Yellow Padlock with "white" checkbox: Locked active account.

Yellow Padlock with "grayed out" checkbox and user record information: Terminated user account.
Only PJM CAMs can reinstate/edit terminated user accounts.

"Grayed out" checkbox before an active user: You are not a CAM Admin for that user's main company account and cannot modify the user account with the Lock/Unlock/Password Reset actions.

Reinstating/Terminating Accounts

CAMs may receive requests to reinstate or to terminate user accounts.

Terminate: A user may have gone on leave, left or retired from the company, or changed job roles and no longer needs the account.

Reinstate: There are times when someone may accidentally terminate their user account. In other cases, a user may have been on leave and has now returned back to work. An account may have been terminated because they left the company or role, but now that user has been hired back or changed job roles within the company. You will need to contact a PJM CAM to be able to reinstate a terminated account.

HOW TO TERMINATE AN ACCOUNT

1. Go to the **Search** tab.

2. Click **User Search**.

3. Type in any combination of the **Account**, **Last Name**, **First Name**, **Email** or **Username** fields.

4. Hit **Enter**.

5. Click the **Username** of the account to be terminated.

6. On the *User Profile* screen, click **Terminate account**.

7. Click **Submit**.

8. In the pop-up warning box, click **Yes**.

> **Note:** Reinstated accounts, the user will no longer have tool/access permissions that were once associated with this account. The user will need to re-request tool/access to use PJM tools, or as a CAM Admin you will need to provision access back prior to use.
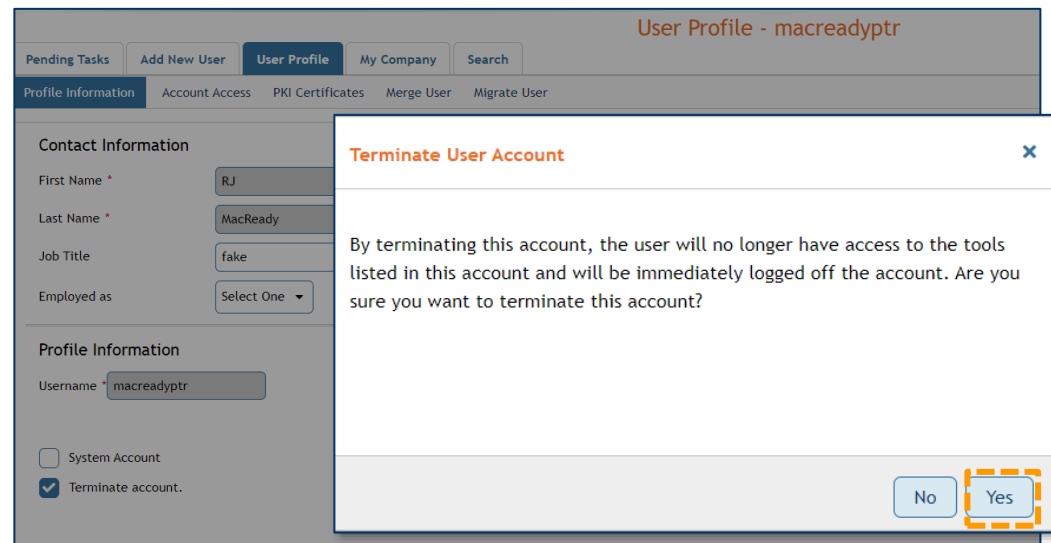
Adding Additional Company Account(s) and/or Tool Access to an Existing User or System Account

1. Go to the **Search** tab.

2. Click **User Search**.

3. Type in any combination of the **Account**, **Last Name**, **First Name**, **Email** or **Username** fields.

4. Click the **username** for desired user.

5. **User Profile** screen – click the *Account Access* subtab.

6. **Access Request** screen – Click Request Access button.

7.

eDART

Currently, a separate application from Account Manager, eDART (Dispatcher Application and Reporting Tool), allows generation and transmission owners to submit generation and transmission outage requests. eDART allows its users to manage their outage data by viewing the status of their outages and obtaining outage reports.

If your line of business is part of Generation or Transmission, you will need to request eDART user accounts for your users.

How to Request a New eDART User Account

eDART registration page PJM.com: https://pjm.com/markets-and-operations/etools/edart

1. Click **Register**.

2. Fill out the CAM and user sections of the form as follows:

   a. Fill out the **Contact Information** section with the CAM Admin's information.

b. Complete the **User** section with the information for up to five new users per request. Complete the information for the first new user, then click **Add New User** to generate additional user information fields.

c. Select the **Access Type** for the new user based on the applicable line of business and leave the other selections blank. Fill in the **Comments/Questions** box as needed.

3. Click **Submit**.   Submit

4. A confirmation will be sent to the new user(s) email address.

Upon receipt of the eDART registration form, PJM personnel will send the authorization email to the CAM Admin(s) of the member company.

User 1

* Registration change: Select one

* Name:

* Username:

User ID with 6-12 alphanumeric characters
For new accounts, when possible, the user's eDART username should be the same as the Account Manager username.

* Email:

* Confirm email:

Application & Access Type

Generation outage tickets:

Transmission outage tickets:

Generic user:

Comments/Questions:

Add New User   Submit

> **Note:** New users are not given access immediately upon form submission. Each request will be reviewed and processed by PJM personnel.

- To approve/authorize the new user account, simply reply to the email with "Approved" or "Authorized" in your response.

- Once PJM receives CAM approval and Transmission CEII approval (if needed), the new account can be created.

- The CAM Admin(s) will receive an email including an updated User List Excel spreadsheet.

- The new user(s) will receive a confirmation email including an assigned password to create the new account.

CAM On-Boarding Quick Start Guide

eDART User Account Management

User accounts may need to be unlocked and/or password resets may need to be done if the user made three unsuccessful login attempts. Currently, only PJM CAMs can unlock and reset passwords for eDART user accounts. Users can contact PJM CAMs directly at accountmanager@pjm.com for assistance; however, if your company has established rules that only CAMs contact PJM directly, please handle as appropriate.

If an eDART user account needs to be terminated, please fill out the same registration form above. Under the User section of the form, for the **Registration change** field, select **revoke access**. You will receive a confirmation email upon completion with an updated Excel user spreadsheet.

Please Email ACCOUNTMANAGER@PJM.COM:

- If additional application tools are required based on the line of business for your company account(s).

- If you wish to also have access to the Account Manager TRAIN (sandbox) site at (https://accountmanagertrain.pjm.com). This is a separate environment from production. An account will be established upon request, and you will need to follow a similar process as used in production to set up your user account (with the CAM Admin role) in TRAIN.

MEMBERSHIP MANAGEMENT COMMUNITY:

For any CAM Admin changes (add/replace/revoke), please have an authorized individual complete a new request on the **Membership Management Community** page under **Maintenance**.

For future business needs requiring the creation of a subaccount, please have an authorized individual complete a new request via the **Membership Management Community** page under **Maintenance**.