New User Registration Quick Guide

March 2022

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User Registration Overview

During the new user account registration process, the user and/or CAM Admin will have the option to create a PJM user account or a system account. The user and/or CAM Admin will have the ability to select a main company account and its subaccounts, along with selecting tools for each company account. **ONLY for new user system accounts, users or CAMs will have the ability to select a subaccount to act as their main account if a Single User Multi Account (SUMA) is not preferred.**

PREREQUISITE TO CREATE NEW PJM USER OR SYSTEM ACCOUNT

CAM Admins must ensure that all of their users' email domains are allowlisted. If a user's email domain is not allowlisted for the selected main company account(s) and their subaccount(s), the new user or CAM Admin will not be able to create a new PJM user or system account for those company accounts/subaccounts. A CAM Admin will need to add the email address or email domain to the allowlist before creating a new PJM user or system account.

See the **Allowlist Quick Guide** for more information about creating and maintaining Allowlists.

REGISTRATION PAGE FOR A NEW PJM USER OR SYSTEM ACCOUNT

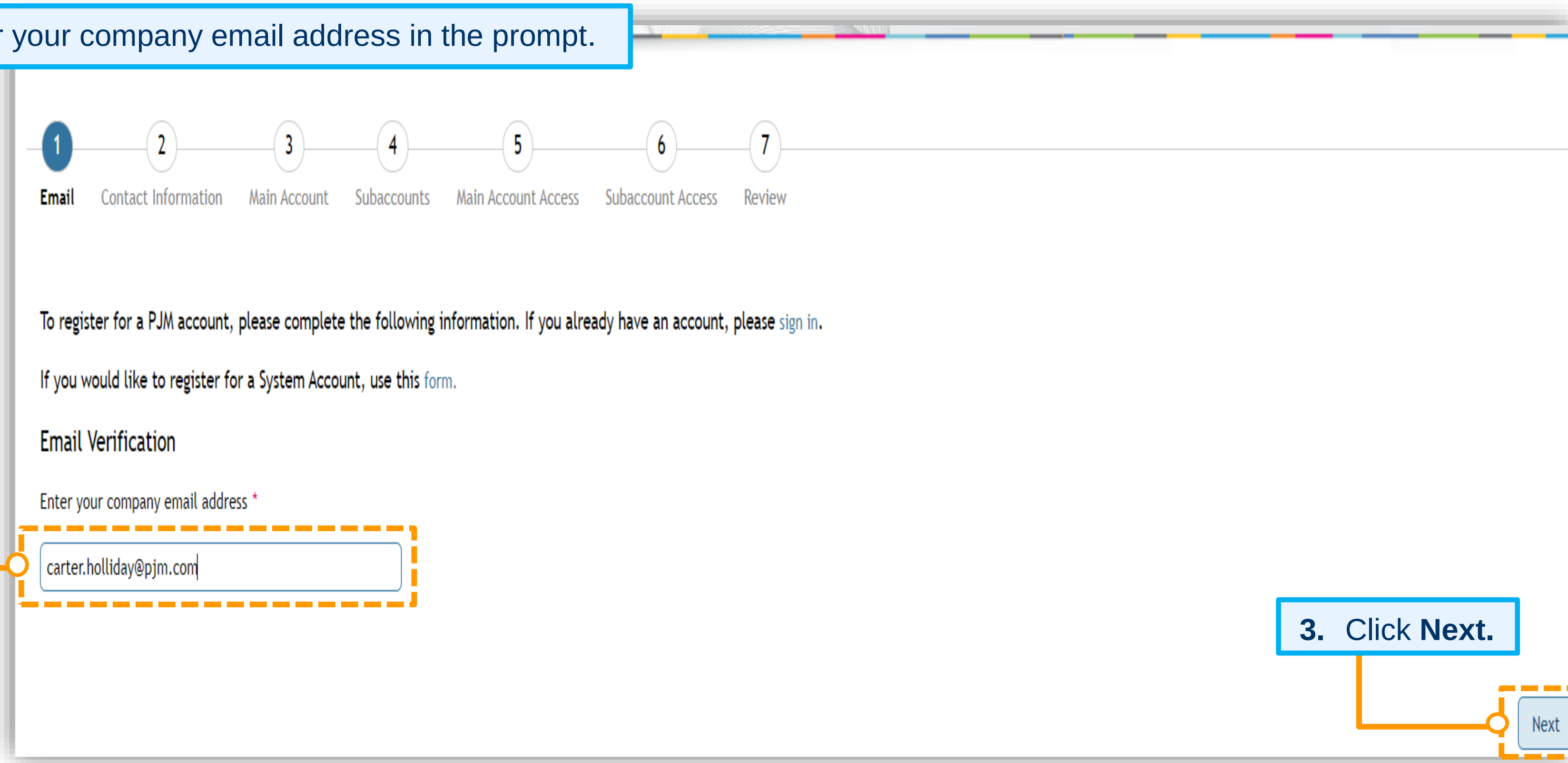
A. Click Sign In in the upper-left corner of the pjm.com homepage.

B. Go to pjm.com > Markets & Operations > PJM Tools > Account Manager.

How to Set Up a New PJM User Account as a User

1. Click **Register** on the pjm.com homepage or the Account Manager tool page.

2. Enter your company email address in the prompt.



3. Click **Next.**

4. Fill in:

A. Sign In information
B. Contact Information
C. Security Questions

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

Warning: This warning will not prevent you from creating a new user account; however, if you have an existing user account, please log in to your current account.

A

Sign In Information

Username * CHolliday15

Between 6 and 12 characters
First character cannot be a special character. Allowed special characters are ()!$~`^_{}

Email * carter.holliday@pjm.com

Your email address is already associated with a PJM account.

B

Contact Information

First Name * Carter

Last Name * Holliday

Job Title * PJM Tester

Phone * -610-555-1212

C

Security Questions

For your protection, these will help us verify your identity in the future.

Answer a minimum of 3 questions below. Capitalization is not important.

Show Security Answers

Q1 * Who is your favorite basketball team? •••••••••••••

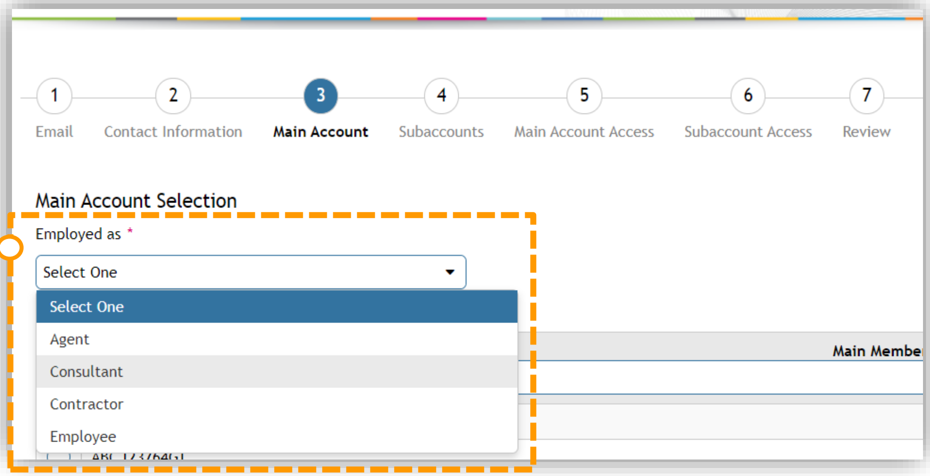
Q2 * What is/was the make and model of your first car? •••••••••••••••

Q3 * What is the name of your current pet? •••••••

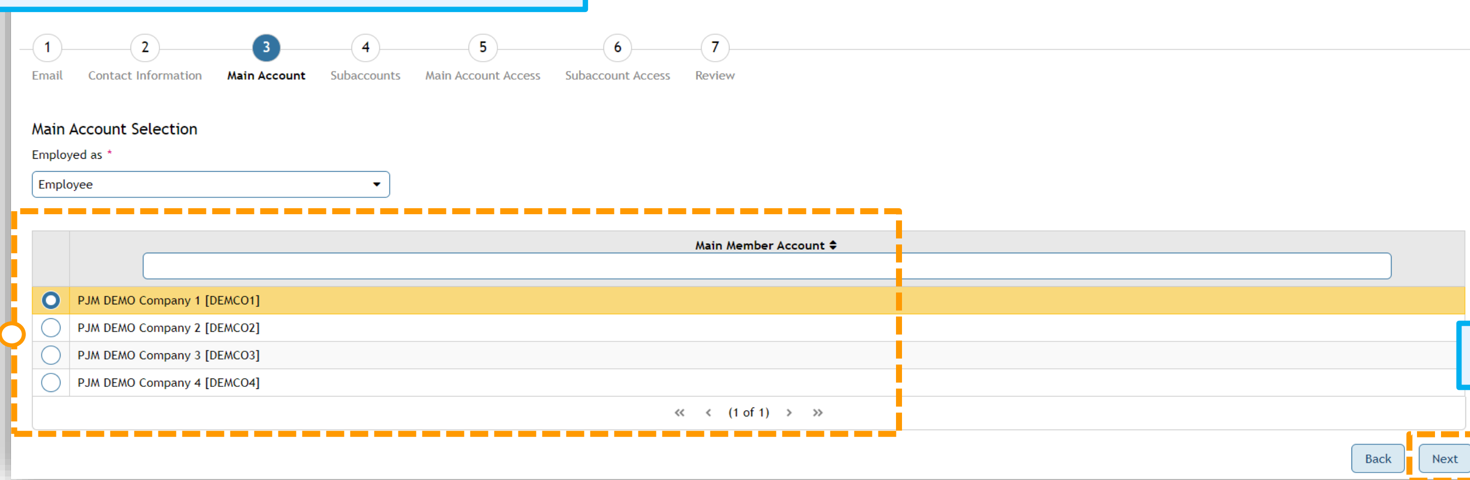
5. Click **Next.**

Back Next

6. Select your relationship to the main company account in the **Employed as** field.



7. Select the main member company account.

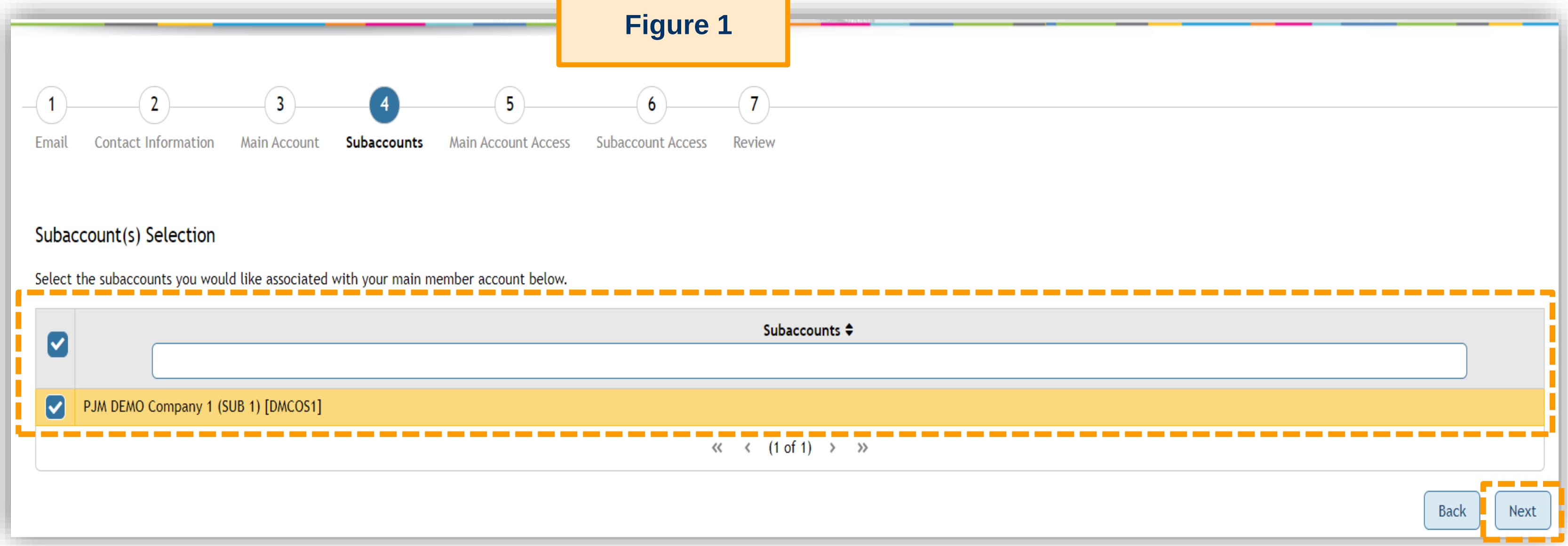


8. Click **Next.**

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 for the main company account (Figure 2).

9. On the *Subaccount(s) Selection* screen, you can select one, multiple or all subaccounts, and then click **Next.**

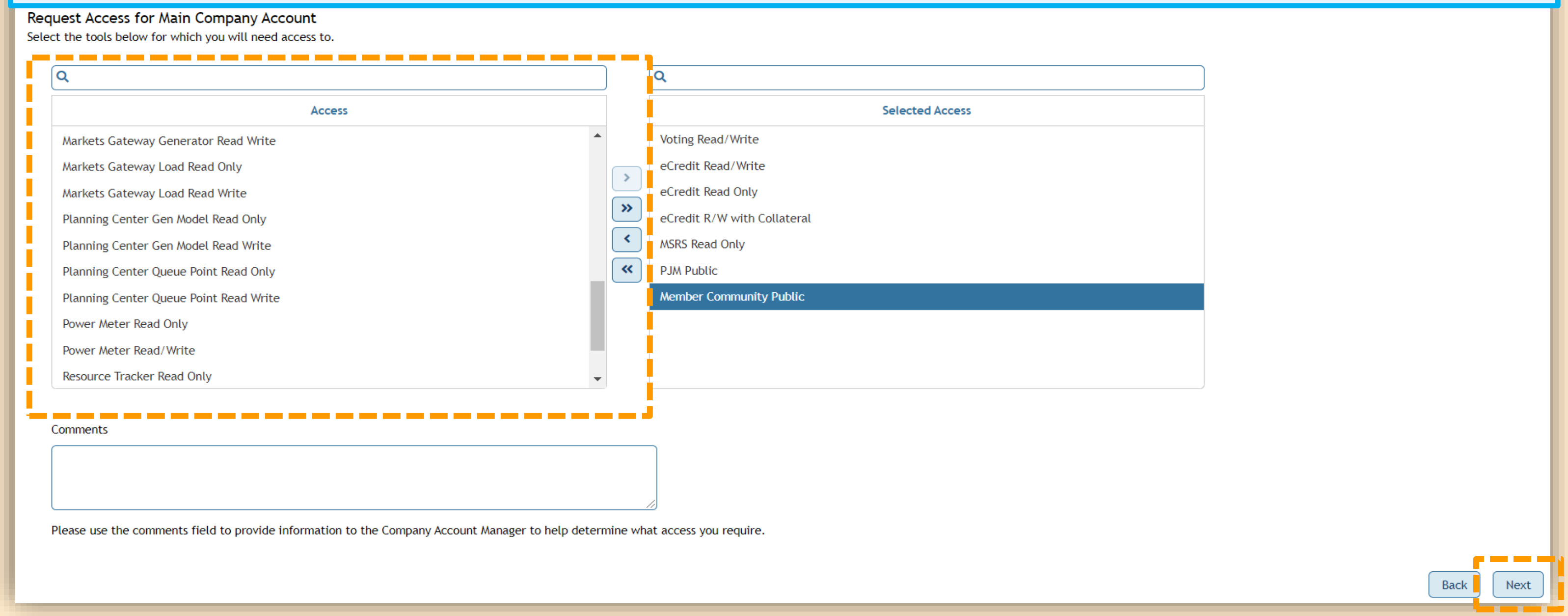
Figure 1



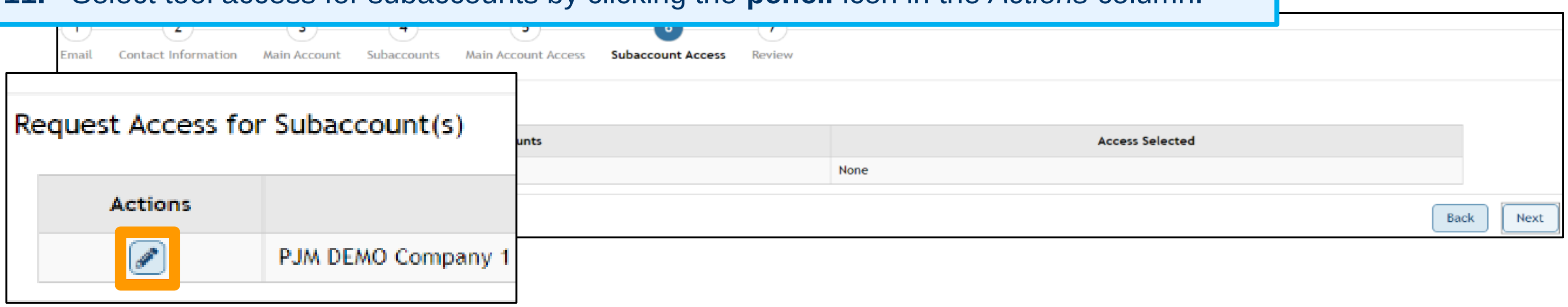
Reminder that subaccounts need to be allowlisted to appear on the *Subaccount(s) Selection* screen.

Figure 2

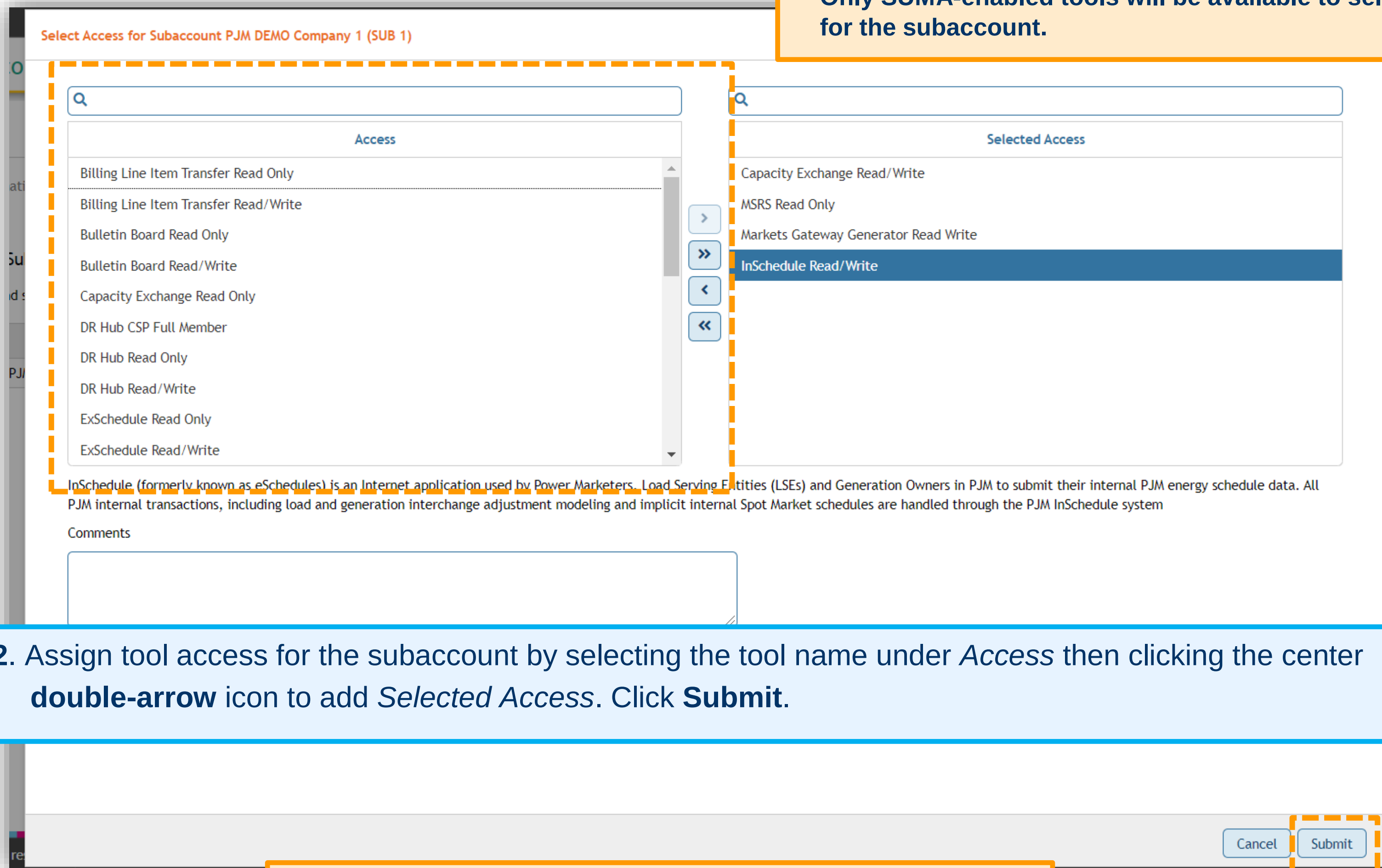
10. Assign tool access for the main account by selecting the tool name under *Access* then clicking the center **double-arrow** icon to add *Selected Access*. Click **Next** to proceed.



11. Select tool access for subaccounts by clicking the **pencil** icon in the *Actions* column.



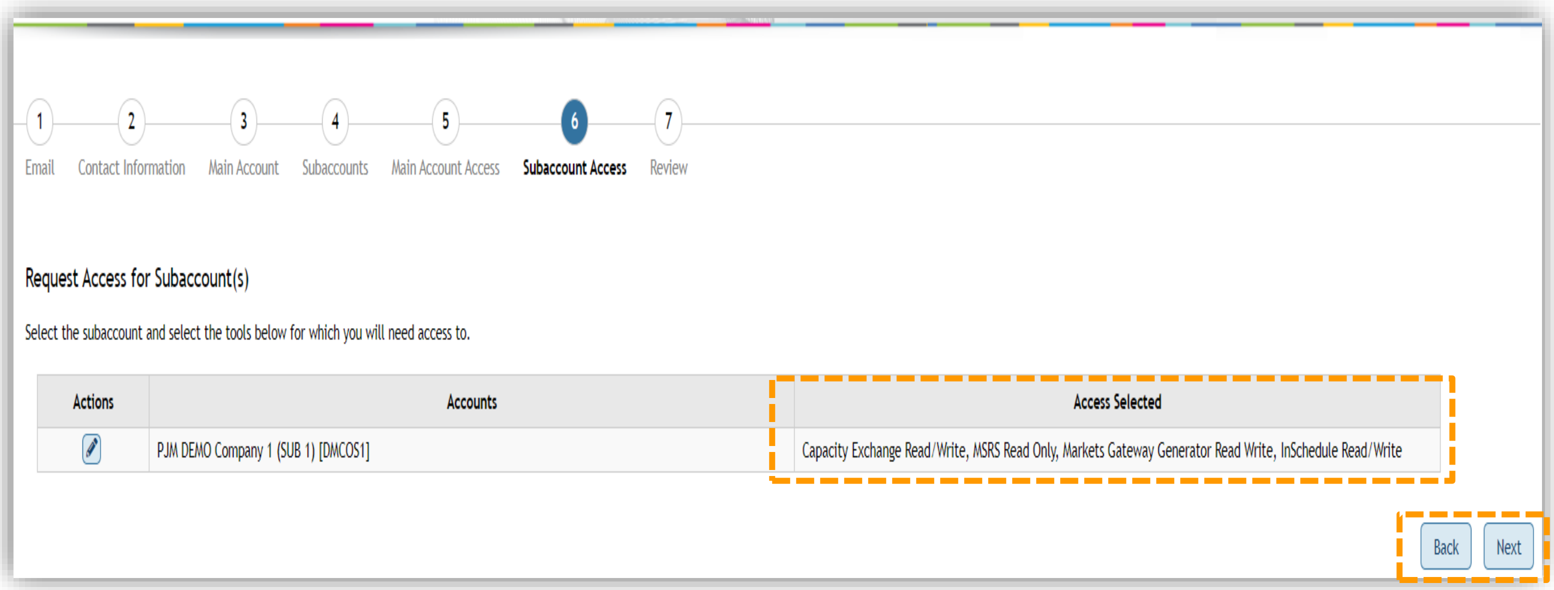
Only SUMA-enabled tools will be available to select for the subaccount.



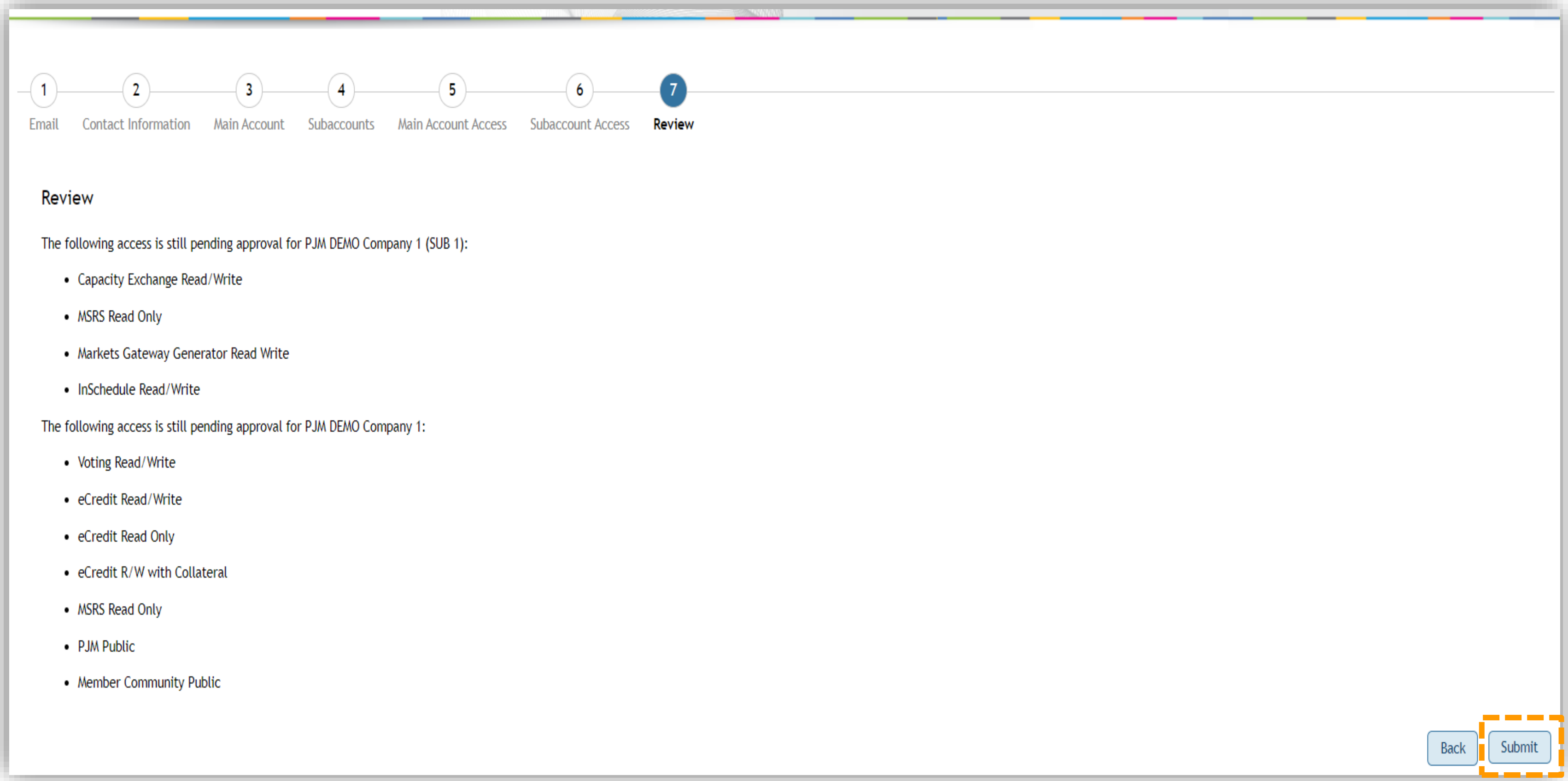
12. Assign tool access for the subaccount by selecting the tool name under *Access* then clicking the center **double-arrow** icon to add *Selected Access*. Click **Submit**.

Repeat steps 11 & 12 for each selected subaccount.

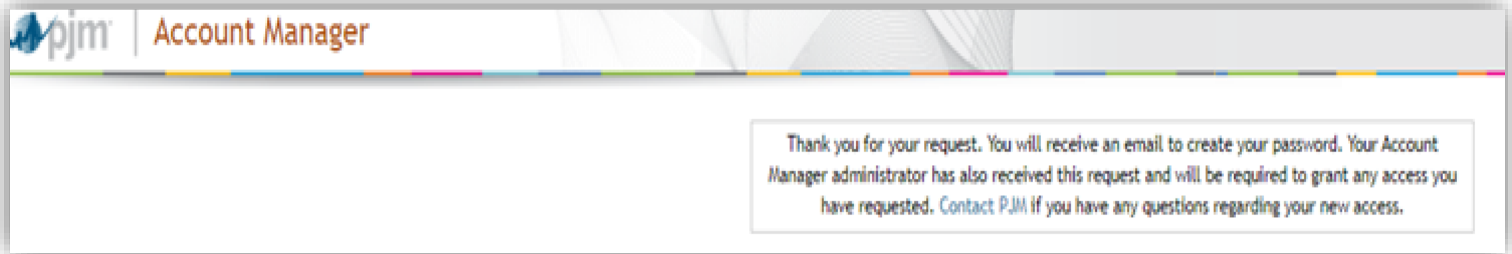
On the *Request Access for Subaccount(s)* screen, you can review the access selected for each selected subaccount. If you missed any tools, click the **Back** button. Follow the previous steps to select additional tools. When you have completed access selection, click **Next.**



On the *Review* screen, review all company account assignments and accesses being granted to the new user account, and click **Submit** to finalize this request.

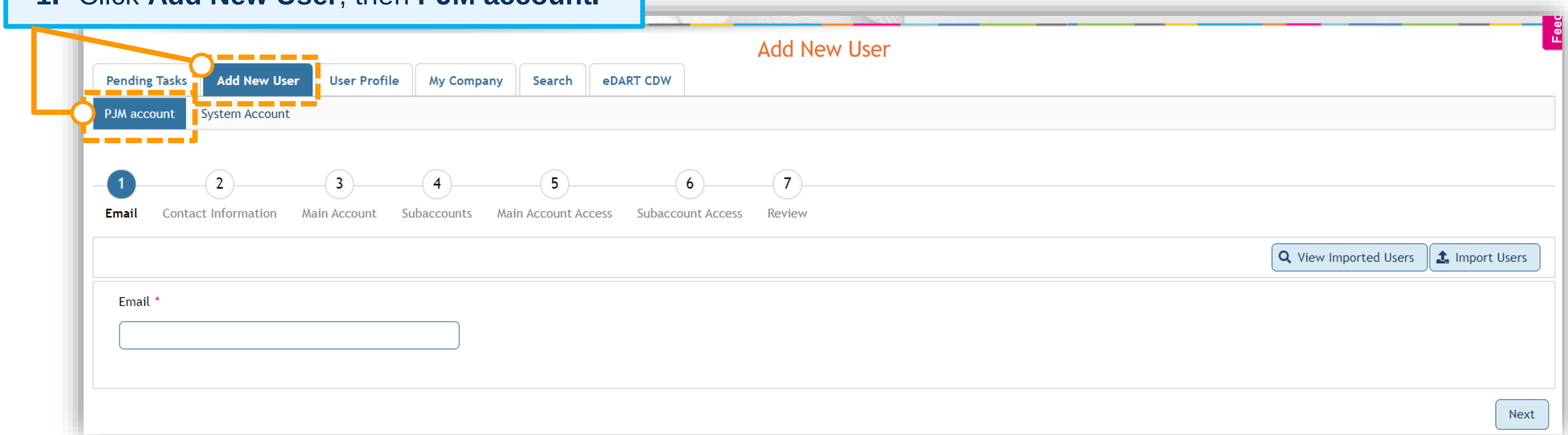


Lastly, the following confirmation screen will appear, and an automated password setup email will be sent to the email address provided in the contact information section. **This password setup link expires four hours after issuance.**

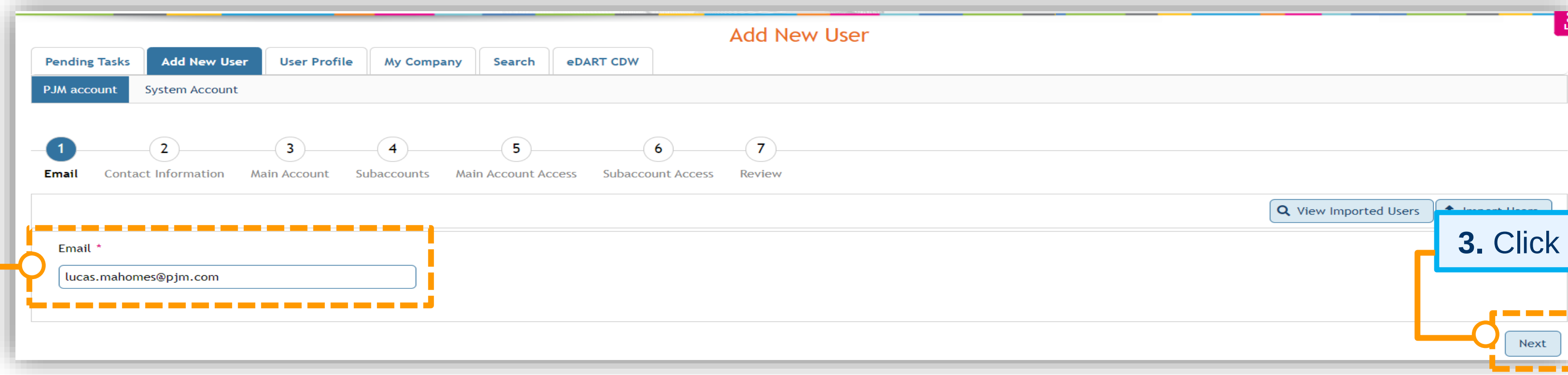


How to Add a New PJM User Account as a CAM Admin

1. Click **Add New User**, then **PJM account.**



2. In the **Email** field, type the user's company email address.



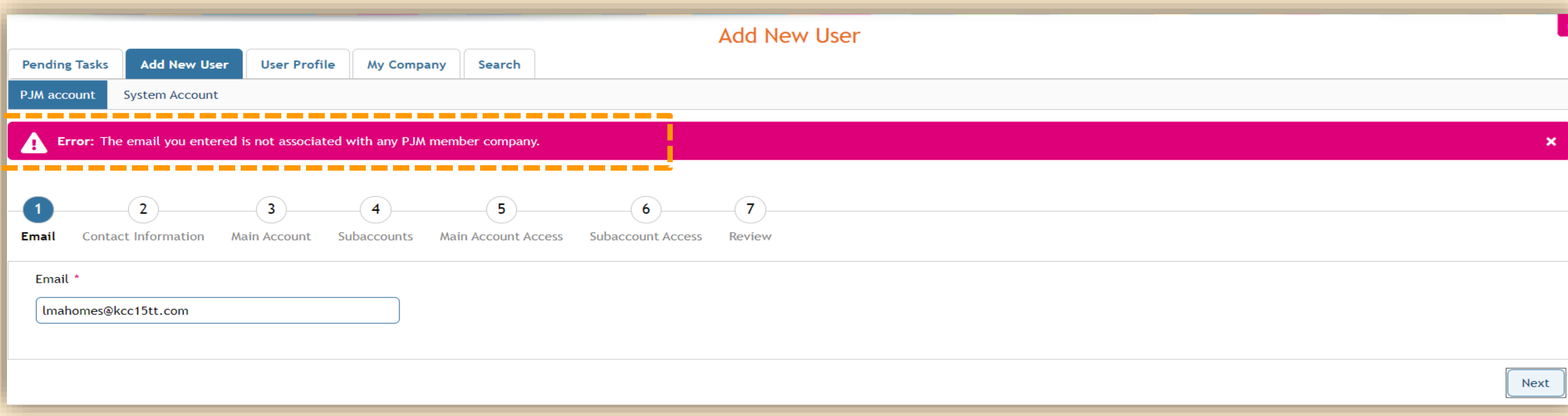
3. Click **Next.**

ERROR MESSAGES WHEN CREATING NEW USER ACCOUNTS AS A CAM

CAMs can only create a new user for the accounts they manage, and the ability to create new user accounts will be limited to those with email addresses on domains that are allowlisted. The error message below will appear if an email address or domain that is not on the allowlist is entered in the contact information for the new user. This error will not allow a CAM to continue until the allowlist is updated or an approved email address is provided.

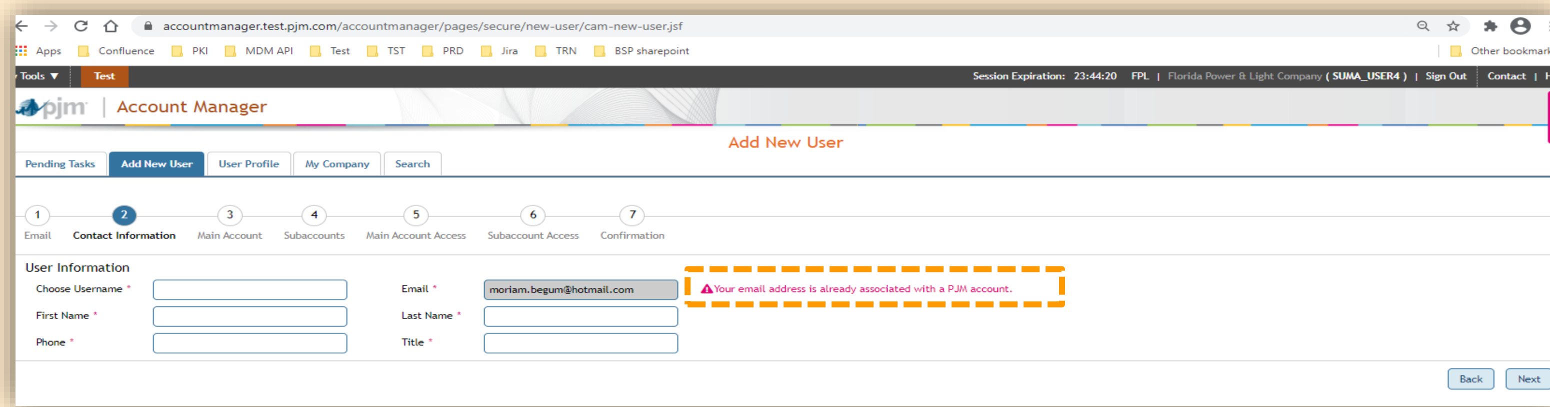
> The CAM will need to add the email domain to their Allowlist for the main company and any applicable subaccounts to proceed.

Error Message: The email you entered is not associated with any PJM member company.



If a user account is already associated with the email address entered, the CAM Admin will see a warning message. Users should be encouraged to update their existing account instead of creating a new one, but this will not prevent the CAM from creating a new user account if that is the decided course of action.

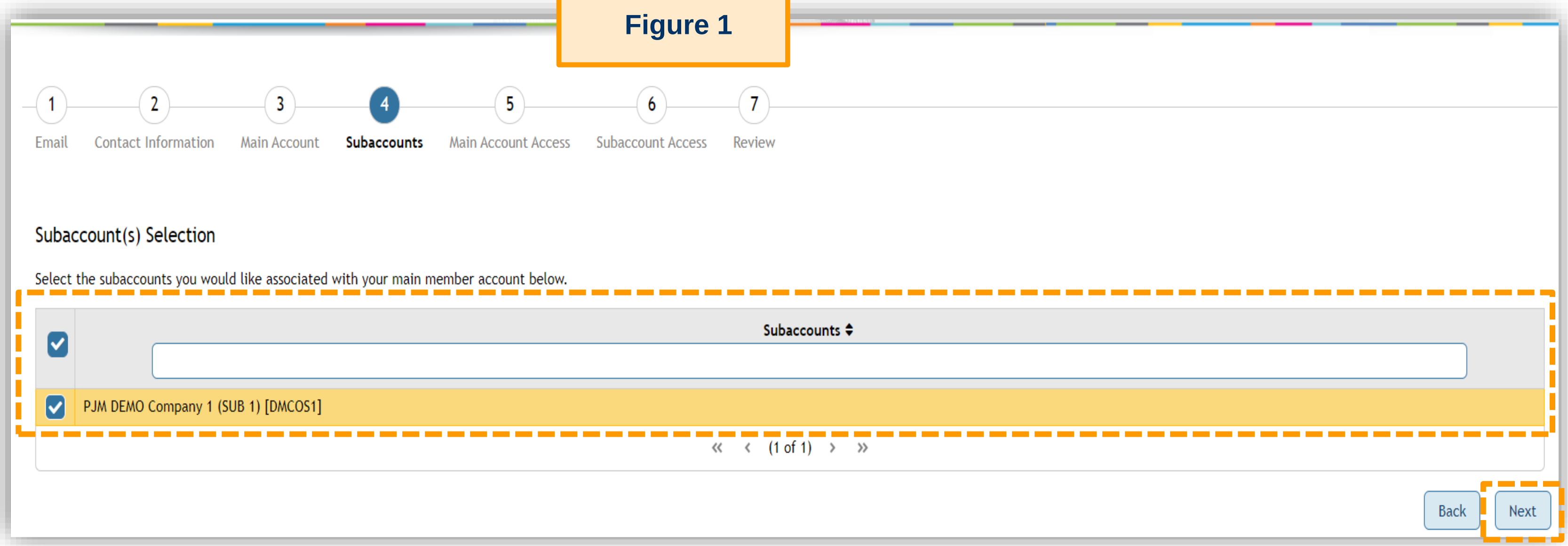
Warning Message: Your email address is already associated with a PJM account.



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 for the main company account (Figure 2).

4. On the *Subaccount(s) Selection* screen, you can select one, multiple or all subaccounts, and then click **Next.**

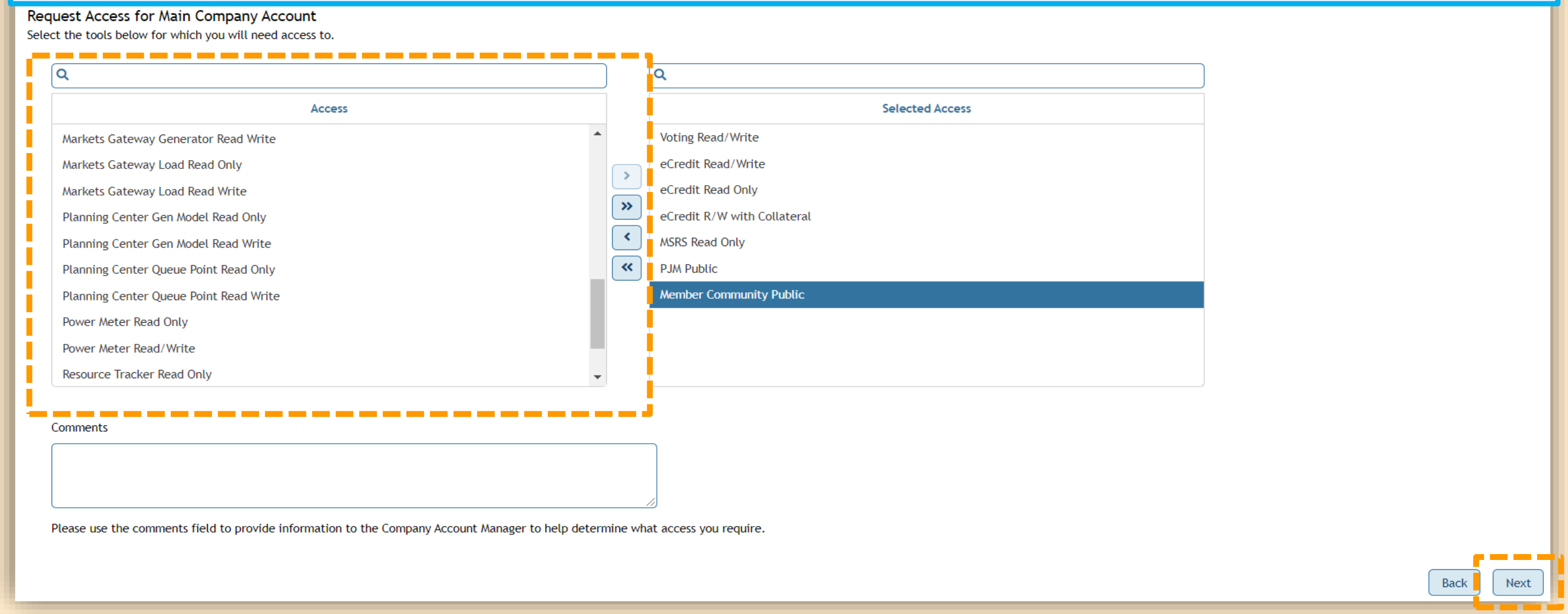
Figure 1



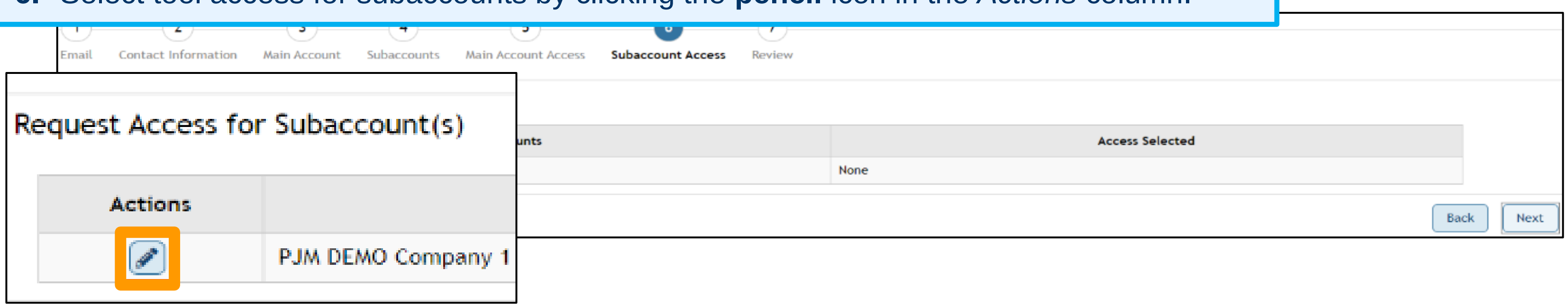
Reminder that subaccounts need to be allowlisted to appear on the *Subaccount(s) Selection* screen.

Figure 2

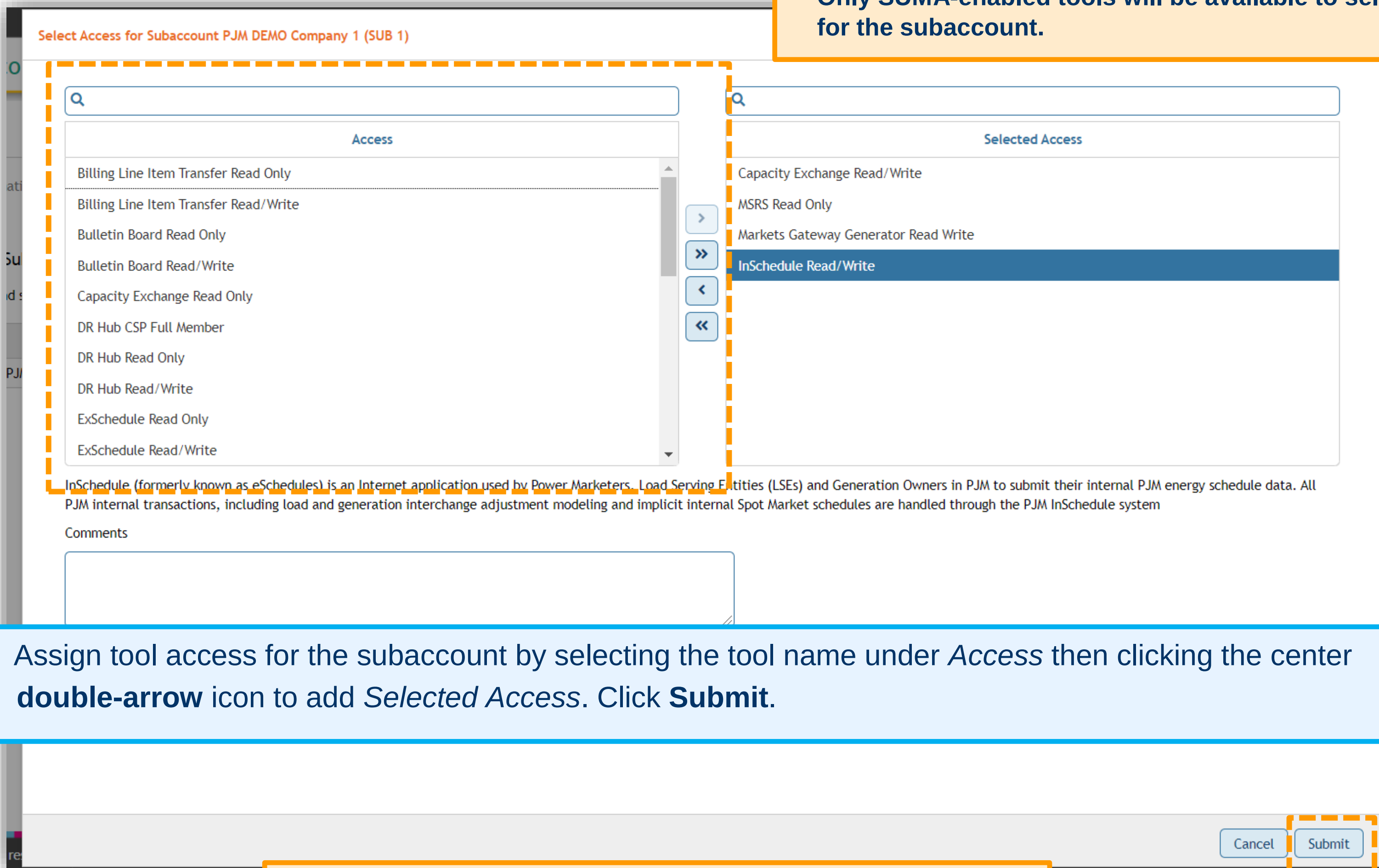
5. Assign tool access for the main account by selecting the tool name under *Access* then clicking the center **double-arrow** icon to add *Selected Access*. Click **Next** to proceed.



6. Select tool access for subaccounts by clicking the **pencil** icon in the *Actions* column.



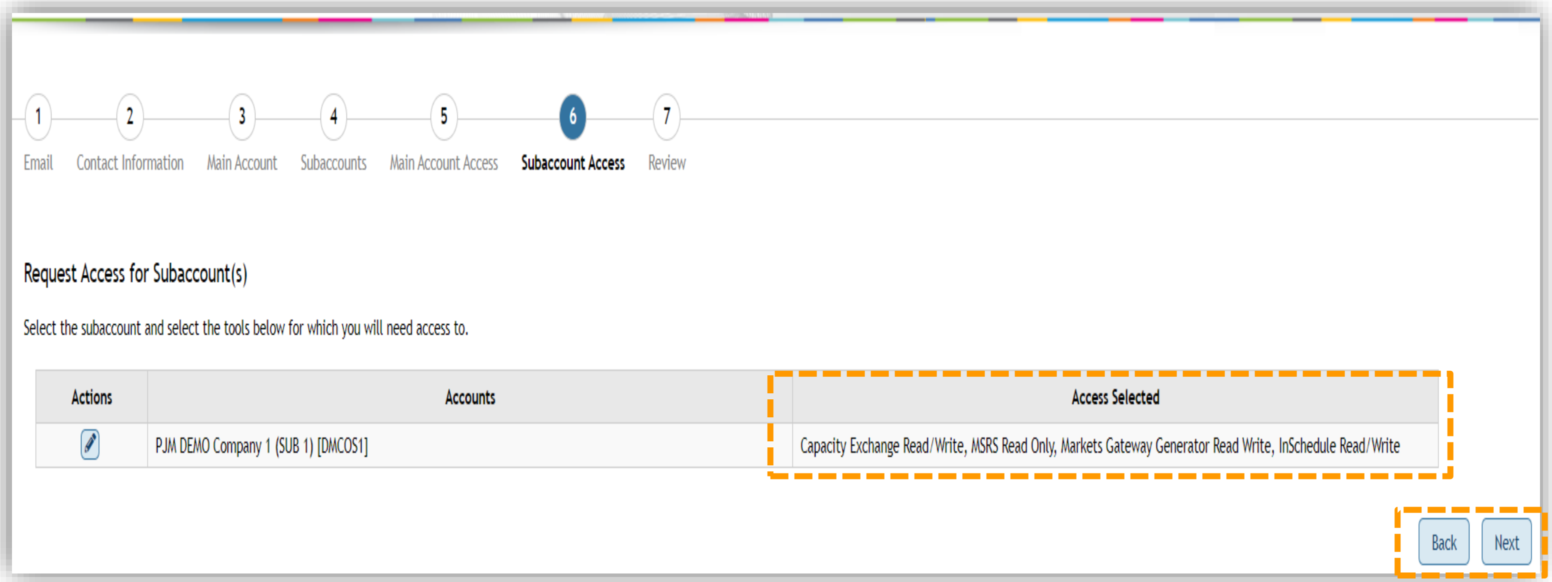
Only SUMA-enabled tools will be available to select for the subaccount.



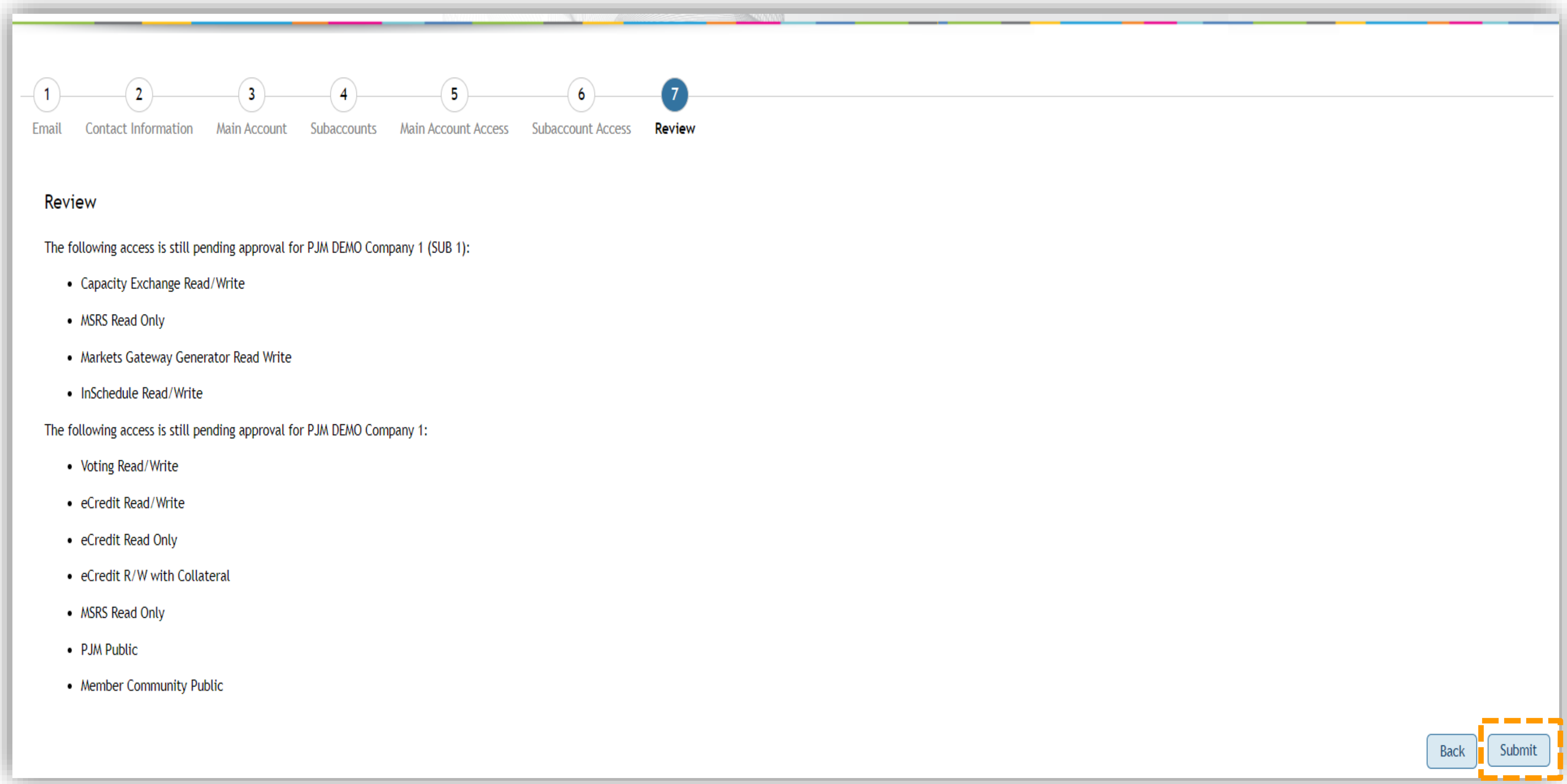
7. Assign tool access for the subaccount by selecting the tool name under *Access* then clicking the center **double-arrow** icon to add *Selected Access*. Click **Submit**.

Repeat steps 6 & 7 for each selected subaccount.

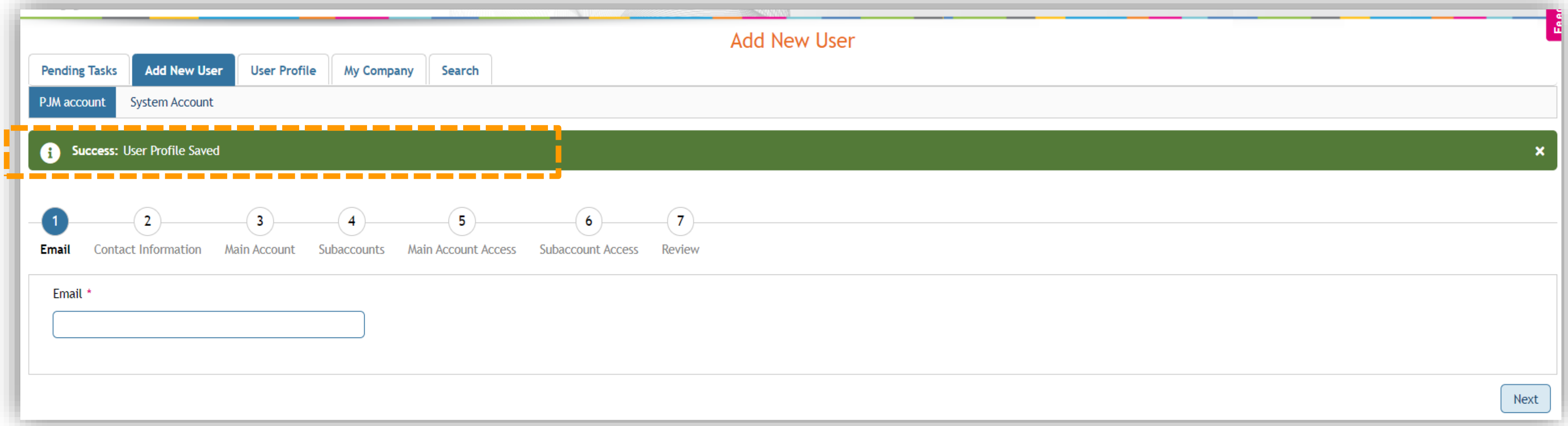
On the *Request Access for Subaccount(s)* screen, you can review the access selected for each selected subaccount. If you missed any tools, click the **Back** button. Follow the previous steps to select additional tools. When you have completed access selection, click **Next.**



On the *Review* screen, review all company account assignments and accesses being granted to the new user account, and click **Submit** to finalize this request.



After submission, you will be taken back to the *Add New User* screen. It will also provide a notice that the new user profile has been saved. The new user's email address assigned to this account will receive an automated email containing a link to set up a password for this newly created user account. **The password setup link expires four hours after issuance.**

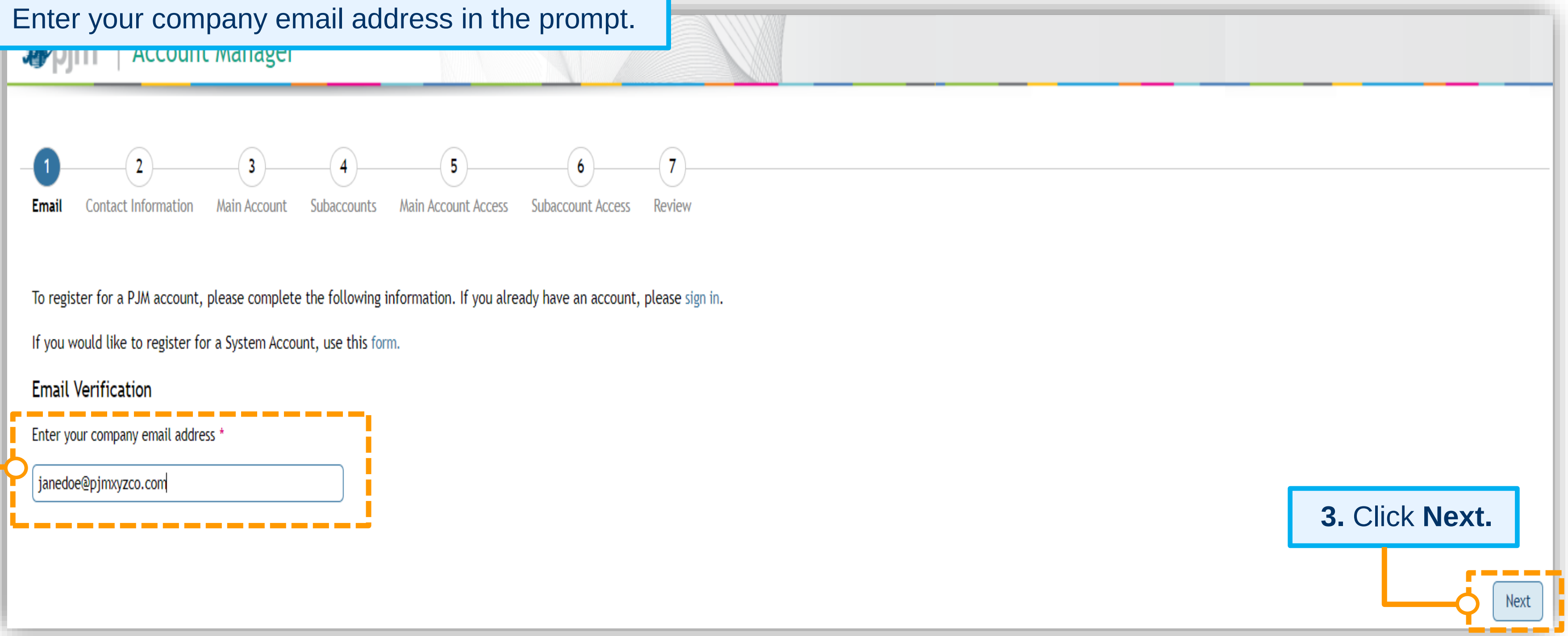


Repeat the steps above for any additional user accounts that need to be created.

How to Set Up a New PJM User Account as a Non-Member, “Other” 3522 Account

1. Click **Register** on the pjm.com homepage or the Account Manager tool page.

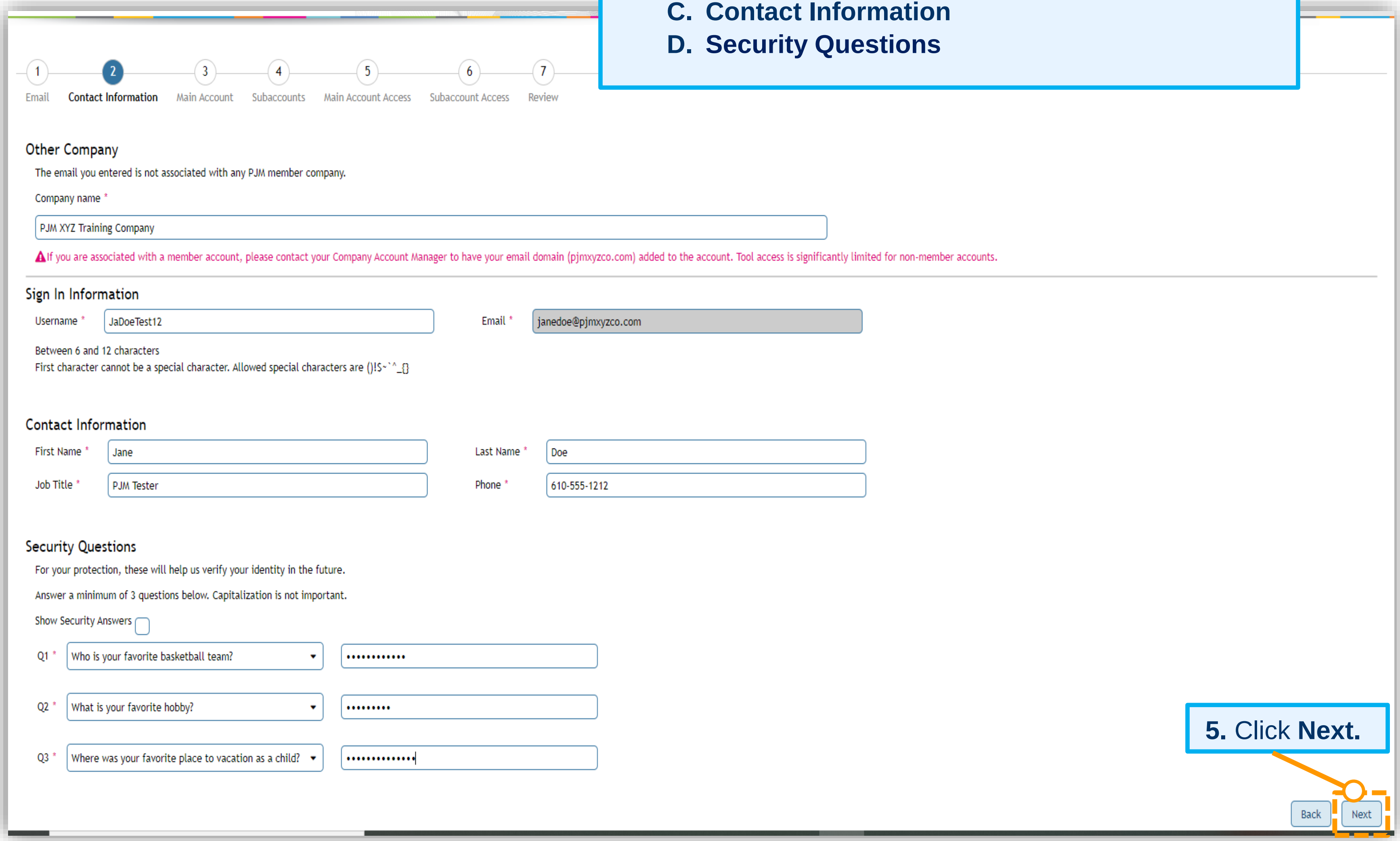
2. Enter your company email address in the prompt.



3. Click **Next.**

4. Fill in:

- **A. Company name**
- **B. Sign In Information**
- **C. Contact Information**
- **D. Security Questions**



A

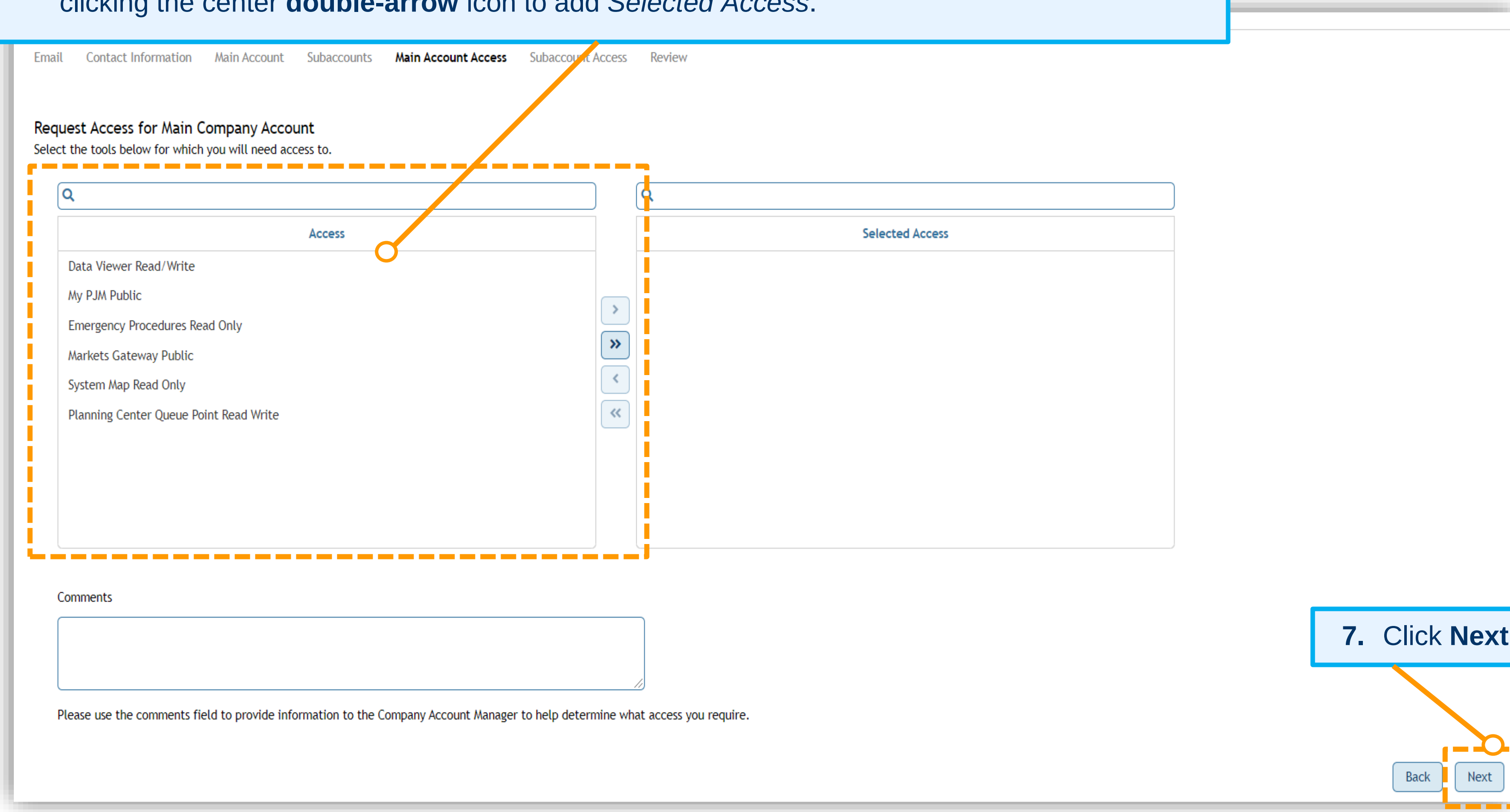
B

C

D

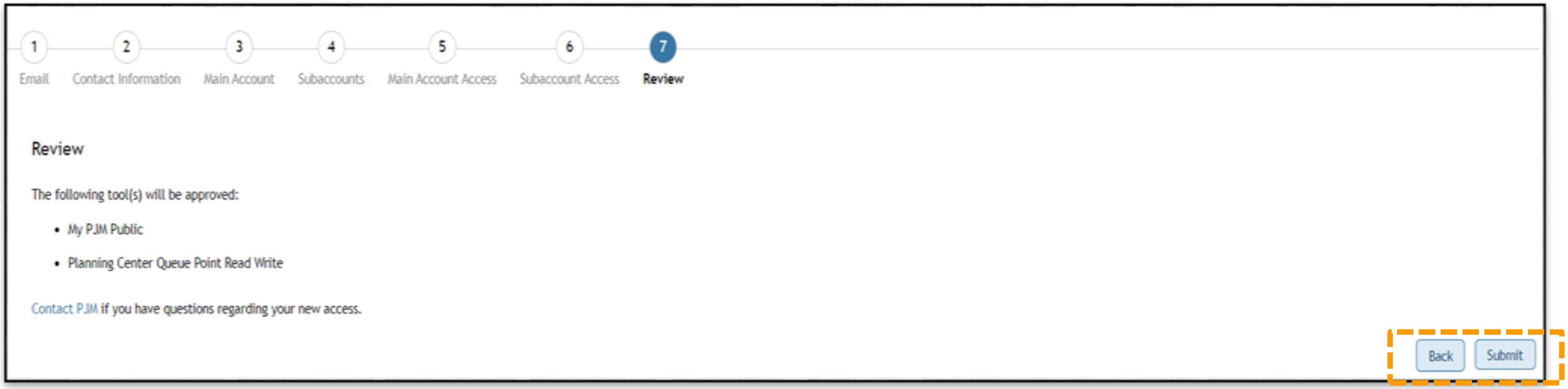
5. Click **Next.**

6. Assign tool access for your main account by selecting the tool name under *Access* then clicking the center **double-arrow** icon to add *Selected Access*.

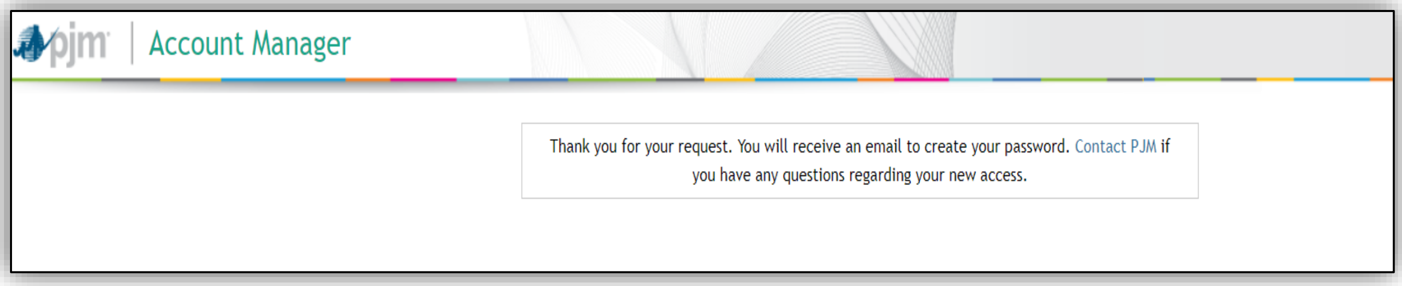


7. Click **Next.**

On the *Review* screen, review all accesses being granted to the new user account. Click the **Back** button if you need to select additional tools or click **Submit** to finalize this request.



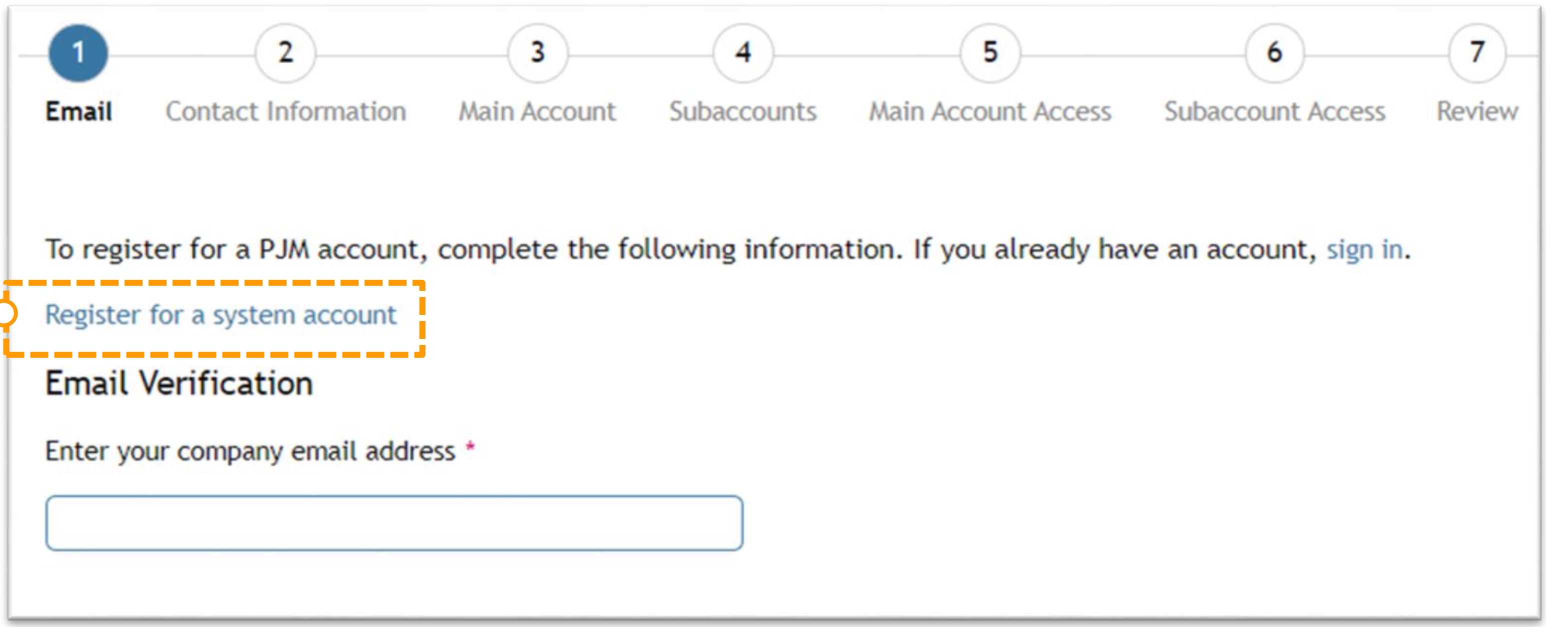
Lastly, the following confirmation screen will appear, and an automated password setup email will be sent to the email address provided in the contact information section. **This password setup link expires four hours after issuance.**



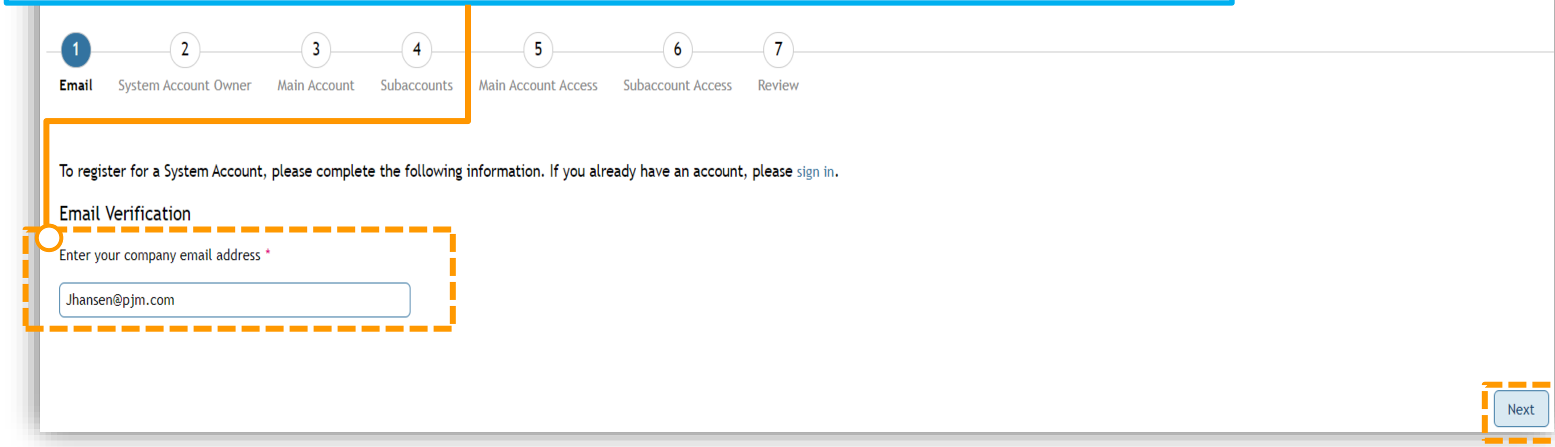
How to Set Up a New System Account as a User

1. Click **Register** on the pjm.com homepage or the Account Manager tool page.

2. Click **Register for a system account** link.



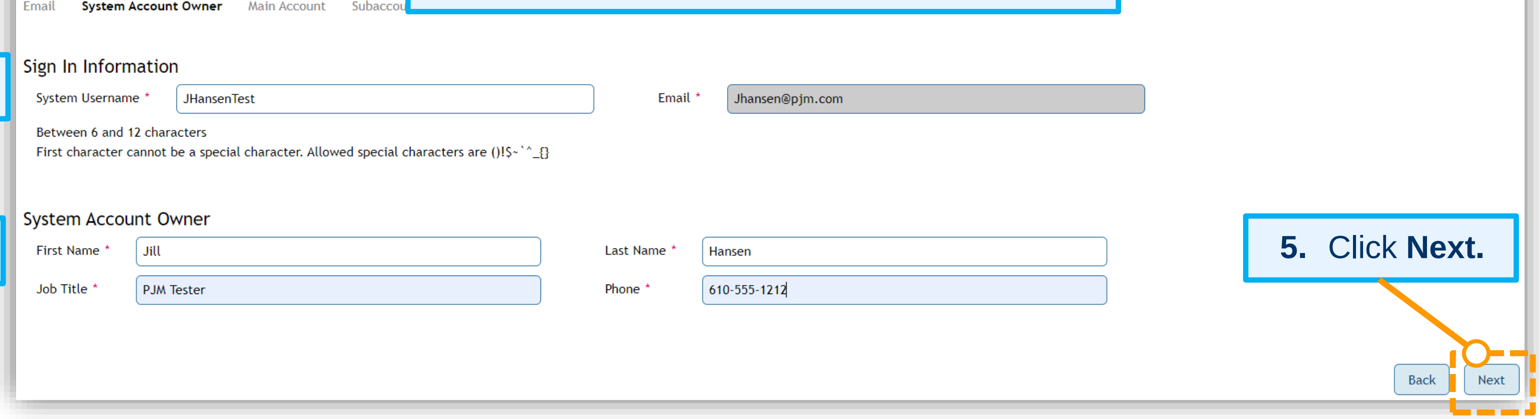
3. Enter your company email address in the prompt, and then click **Next.**



4. Fill in:

A. Sign In Information

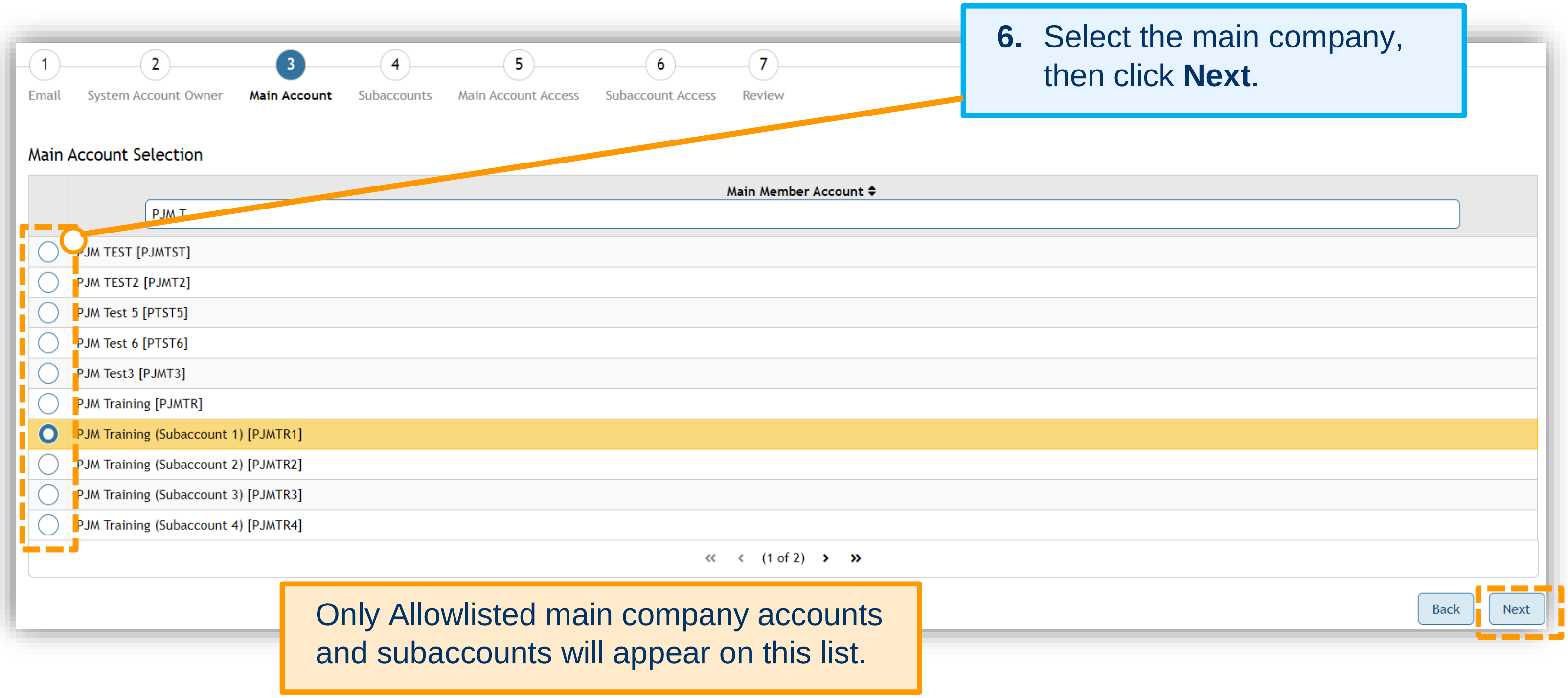
B. System Account Owner



A

B

5. Click **Next.**



If the main company account has subaccounts, it will proceed to the *Subaccounts Selection* screen (Figure 1), or if the main company account has no subaccounts, or a subaccount account was selected as your main company account, it will proceed to the *Tools Selector* screen for the main account (Figure 2).

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

Figure 1

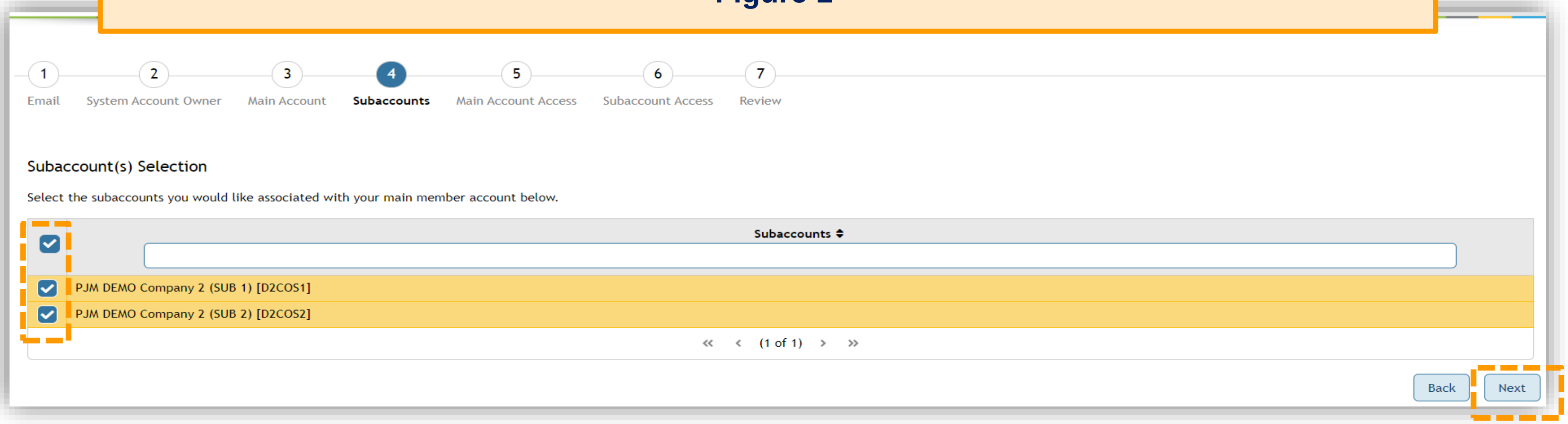
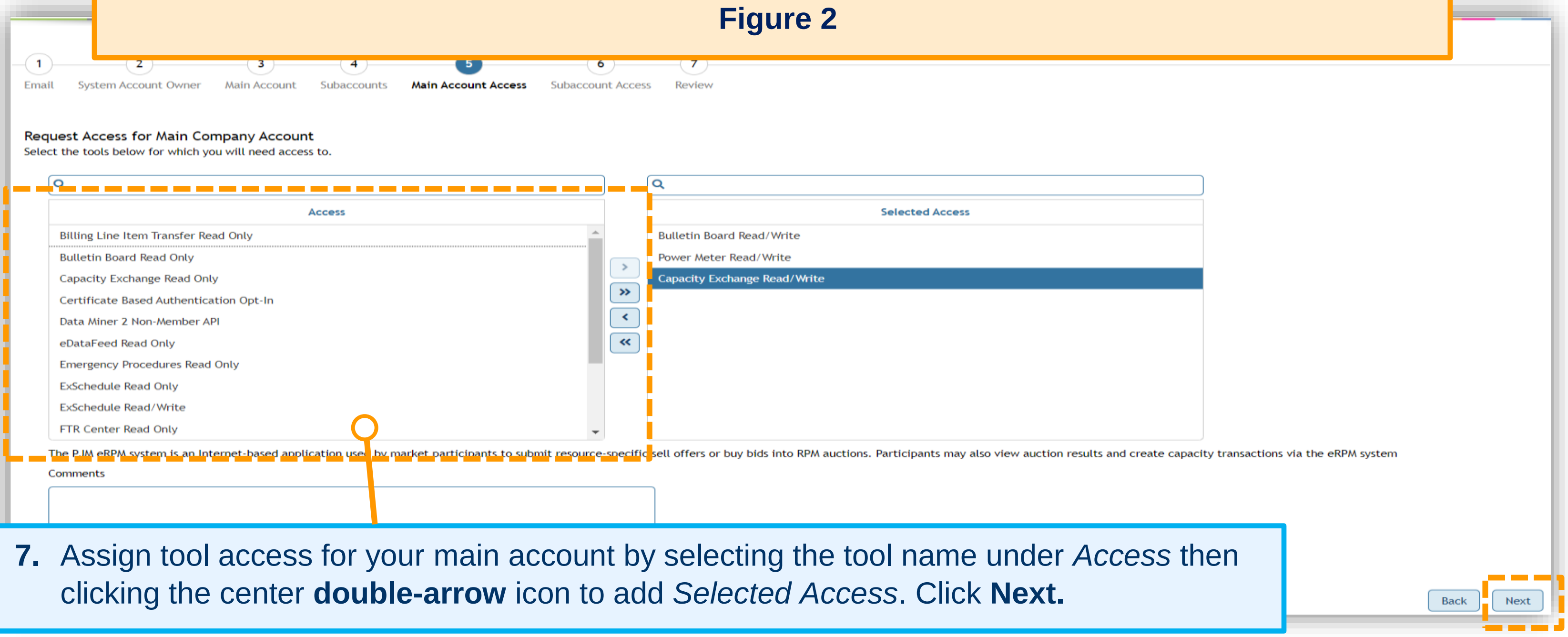


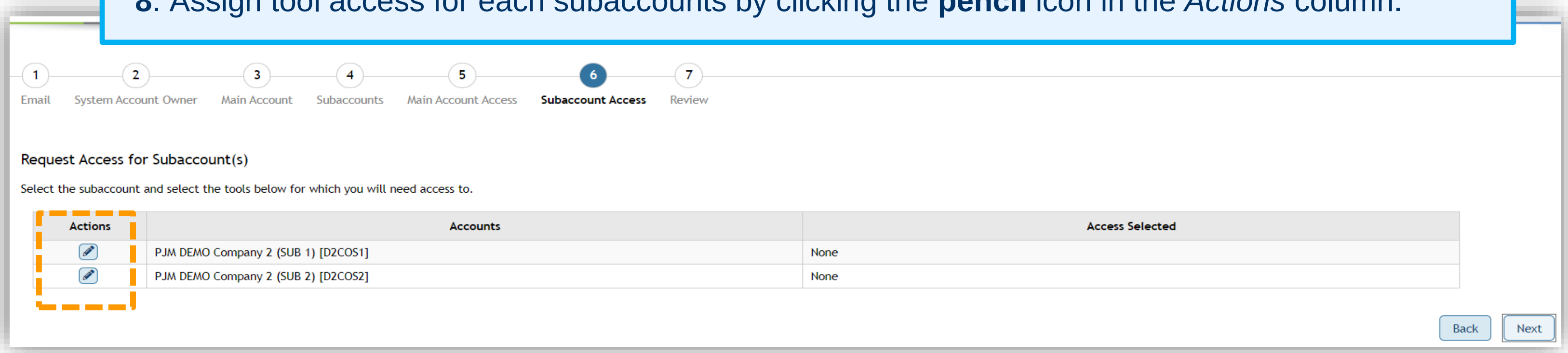
Figure 2

Only API tools will be displayed.

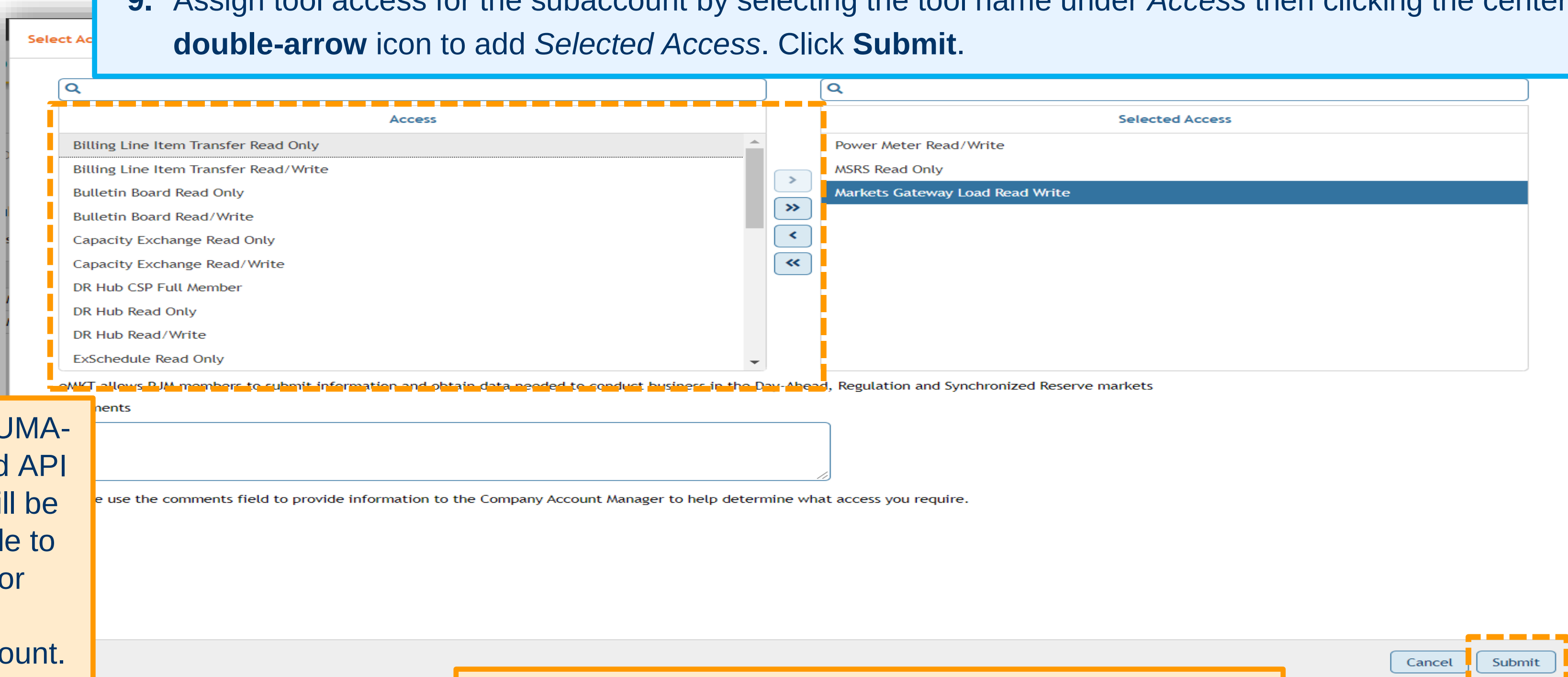


7. Assign tool access for your main account by selecting the tool name under *Access* then clicking the center **double-arrow** icon to add *Selected Access*. Click **Next.**

8. Assign tool access for each subaccounts by clicking the **pencil** icon in the *Actions* column.



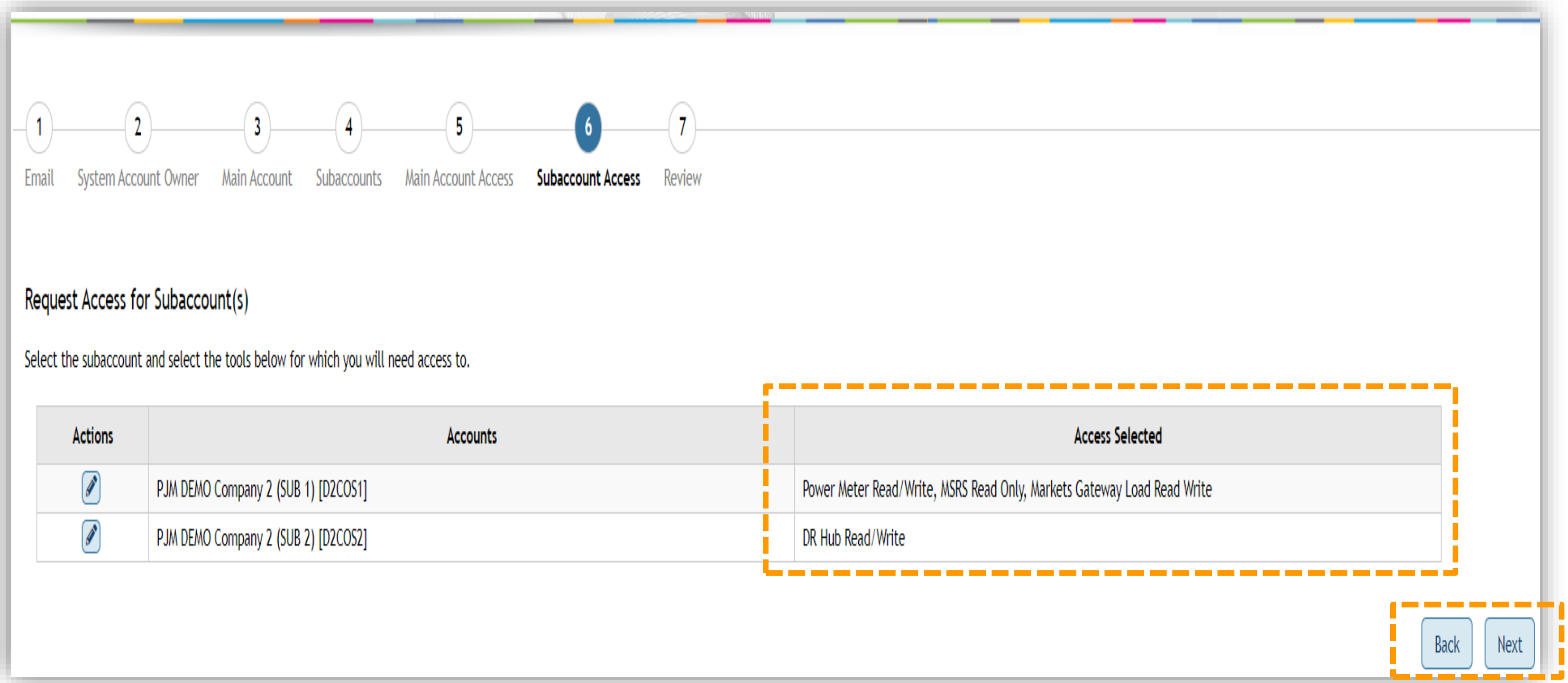
9. Assign tool access for the subaccount by selecting the tool name under *Access* then clicking the center **double-arrow** icon to add *Selected Access*. Click **Submit**.



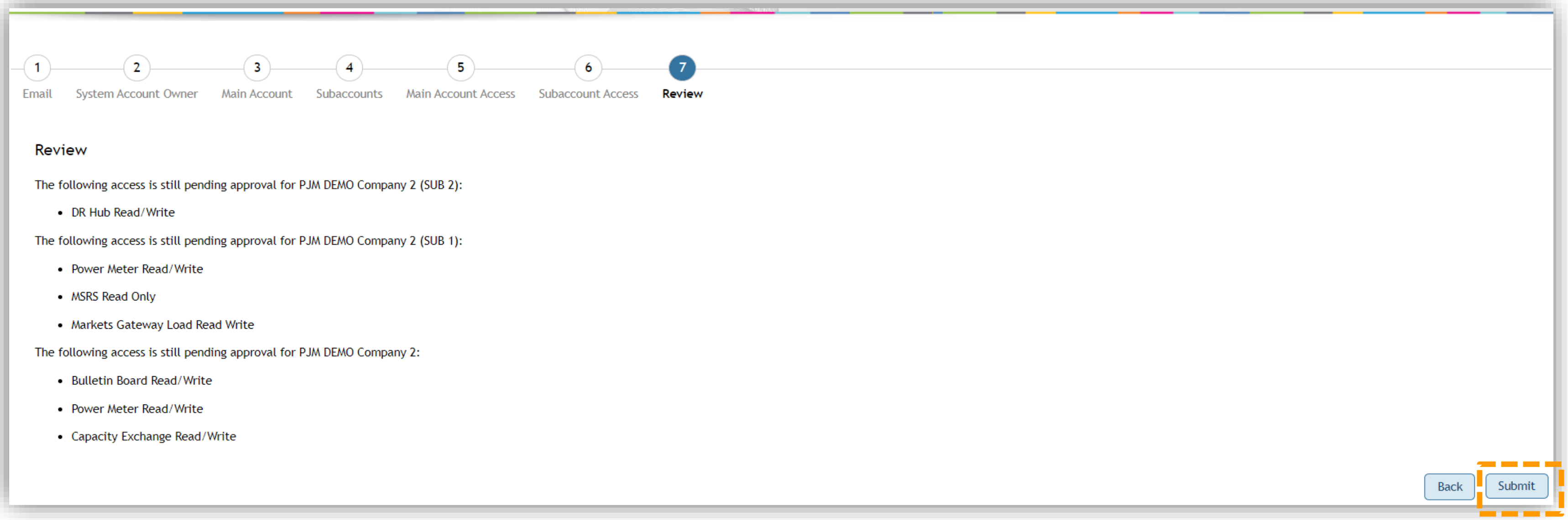
Only SUMA-enabled API tools will be available to select for each subaccount.

Repeat Steps 8 & 9 for each additional subaccount.

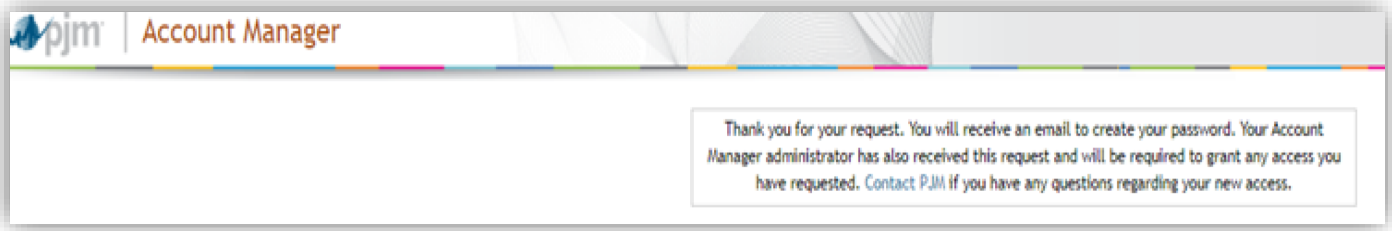
On the *Request Access for Subaccount(s)* screen, you can review the access selected for each subaccount. If you missed any tools, click the **Back** button. Follow the previous steps to select additional tools. When you have completed access selection, click **Next**.



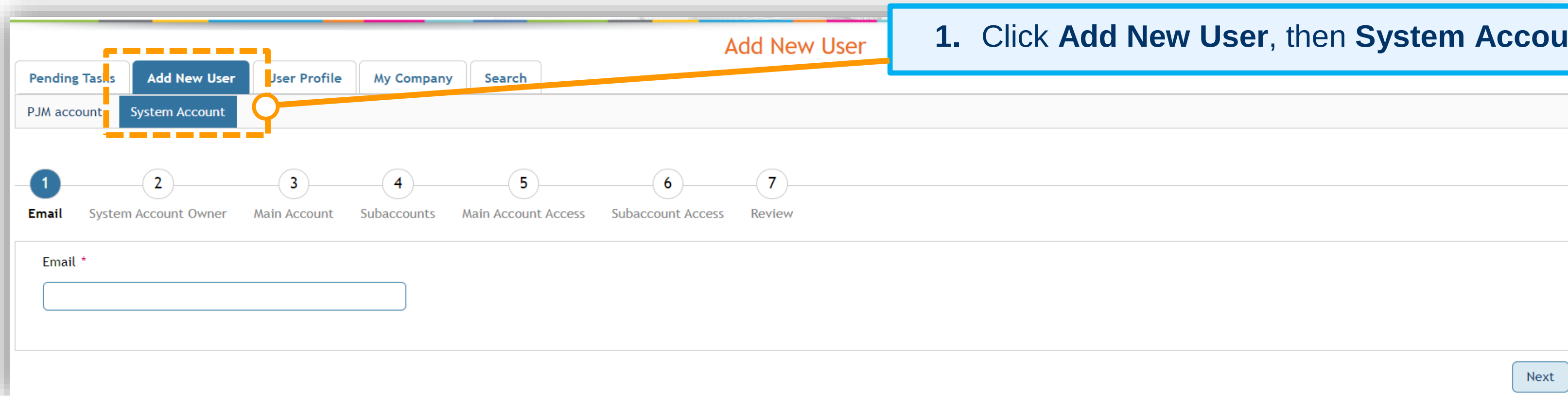
On the *Review* screen, review all company accounts and accesses being granted to the new system account, and click **Submit** to finalize the request.



Lastly, the following confirmation screen will appear, and an automated password setup email will be sent to the email address provided in the contact information section. **This password setup link expires four hours after issuance.**

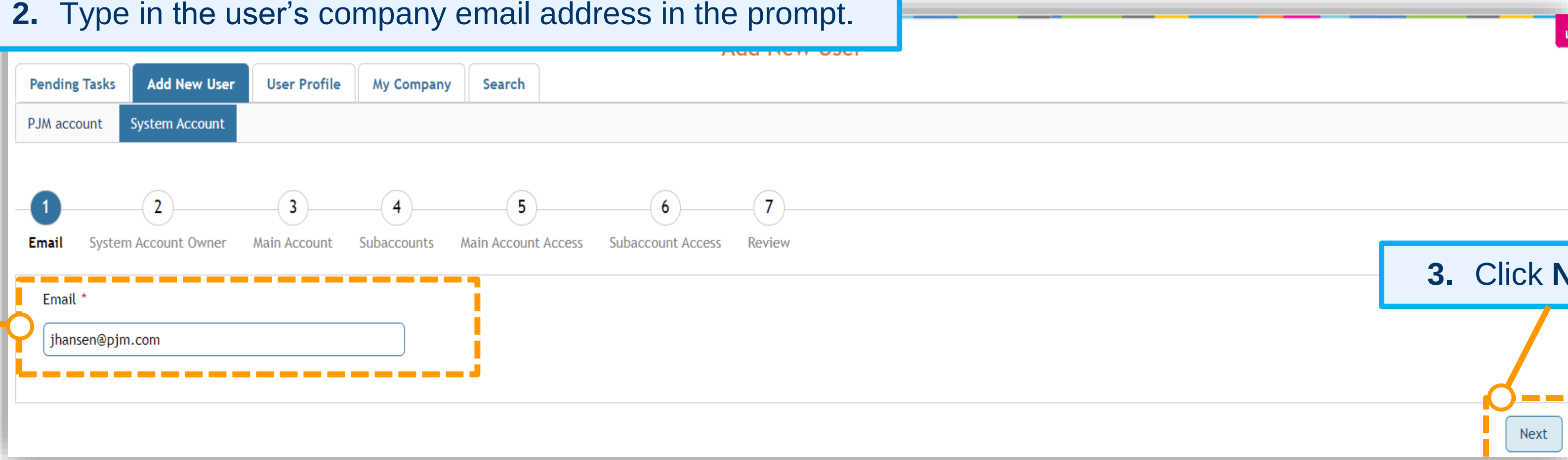


How to Add a New System Account as a CAM Admin



1. Click **Add New User**, then **System Account.**

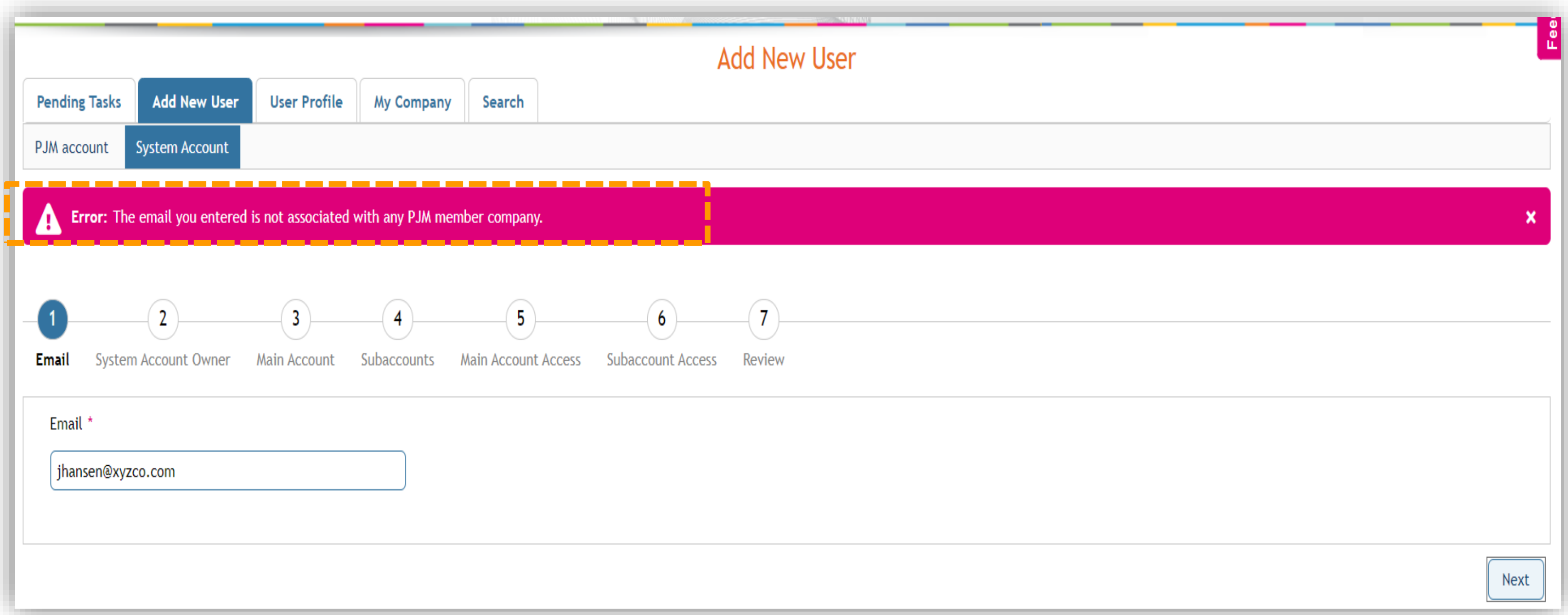
2. Type in the user's company email address in the prompt.



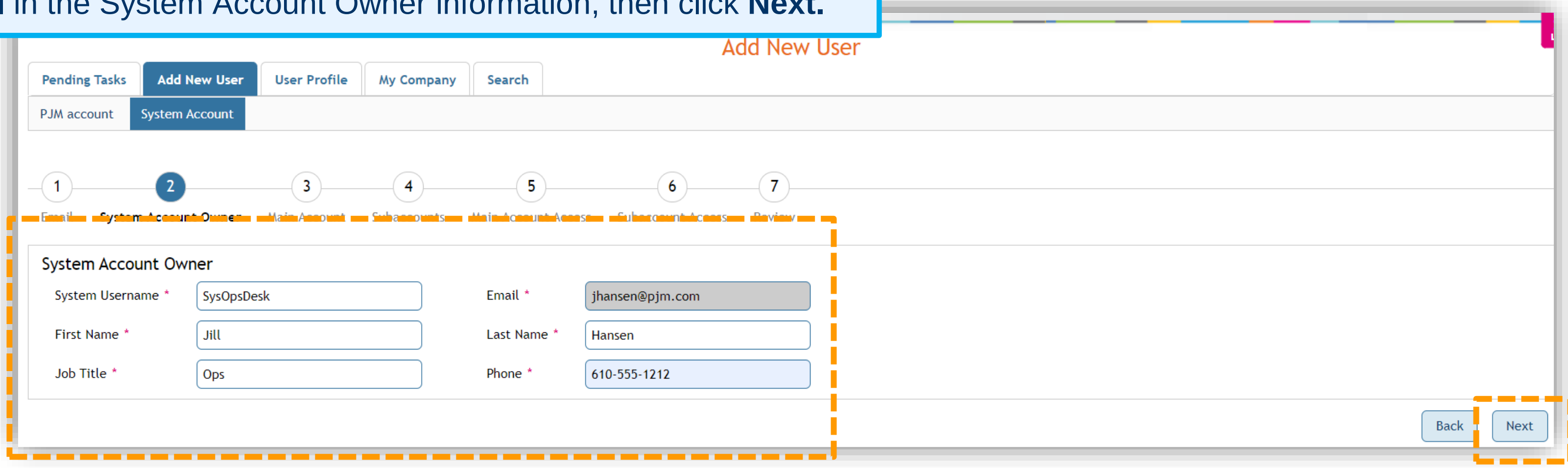
3. Click **Next.**

Error Message: Email domain is not on the associated Allowlist.

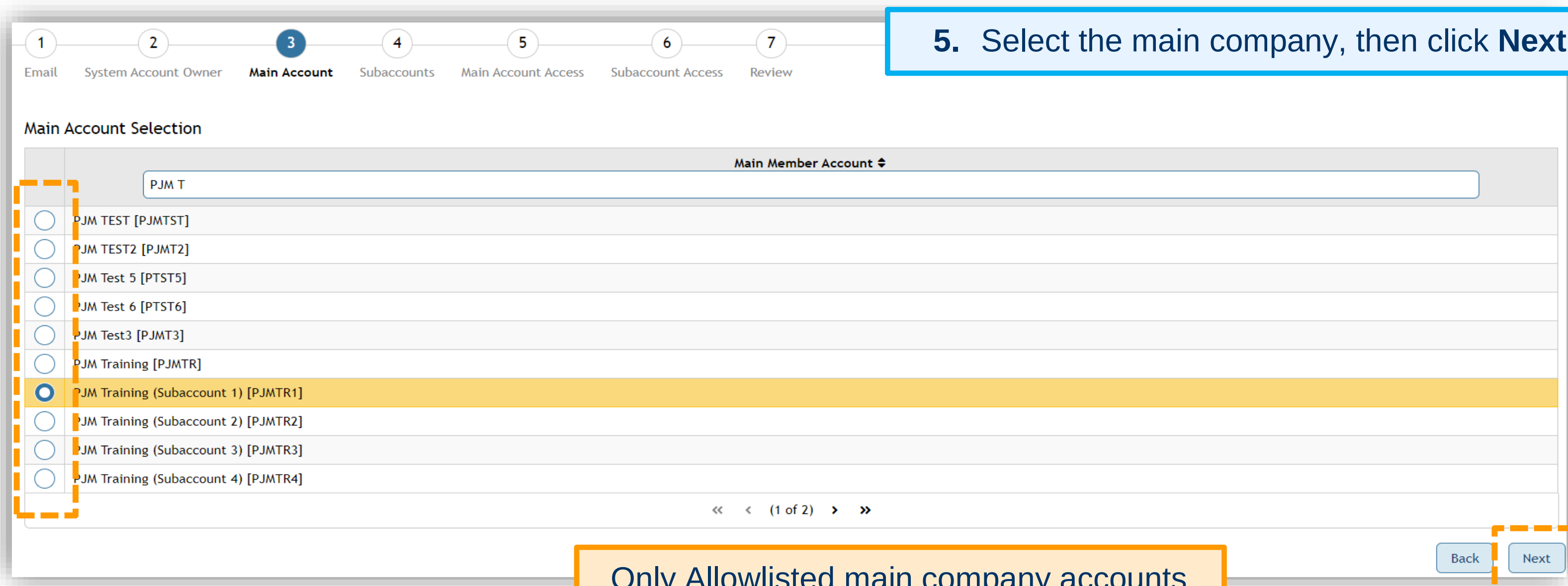
CAMs can only create a new user for the accounts they manage, and the accounts will be limited by domains that are Allowlisted. The error message below is displayed if an email domain that does not match the Allowlist is entered. This will not allow a CAM to continue until the email domain has been added to the Allowlist for the main company and any applicable subaccounts.



4. Fill in the System Account Owner information, then click **Next.**



5. Select the main company, then click **Next.**



Only Allowlisted main company accounts and subaccounts will appear on this list.

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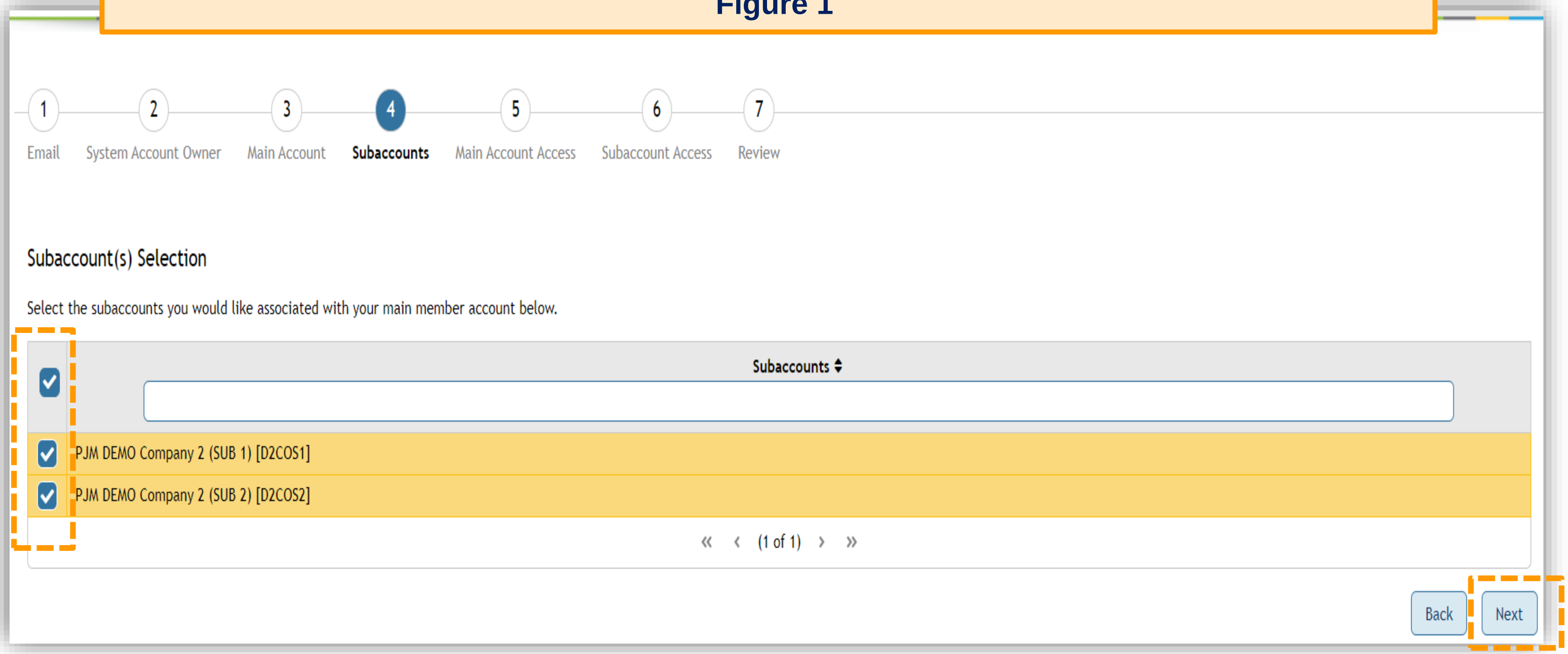
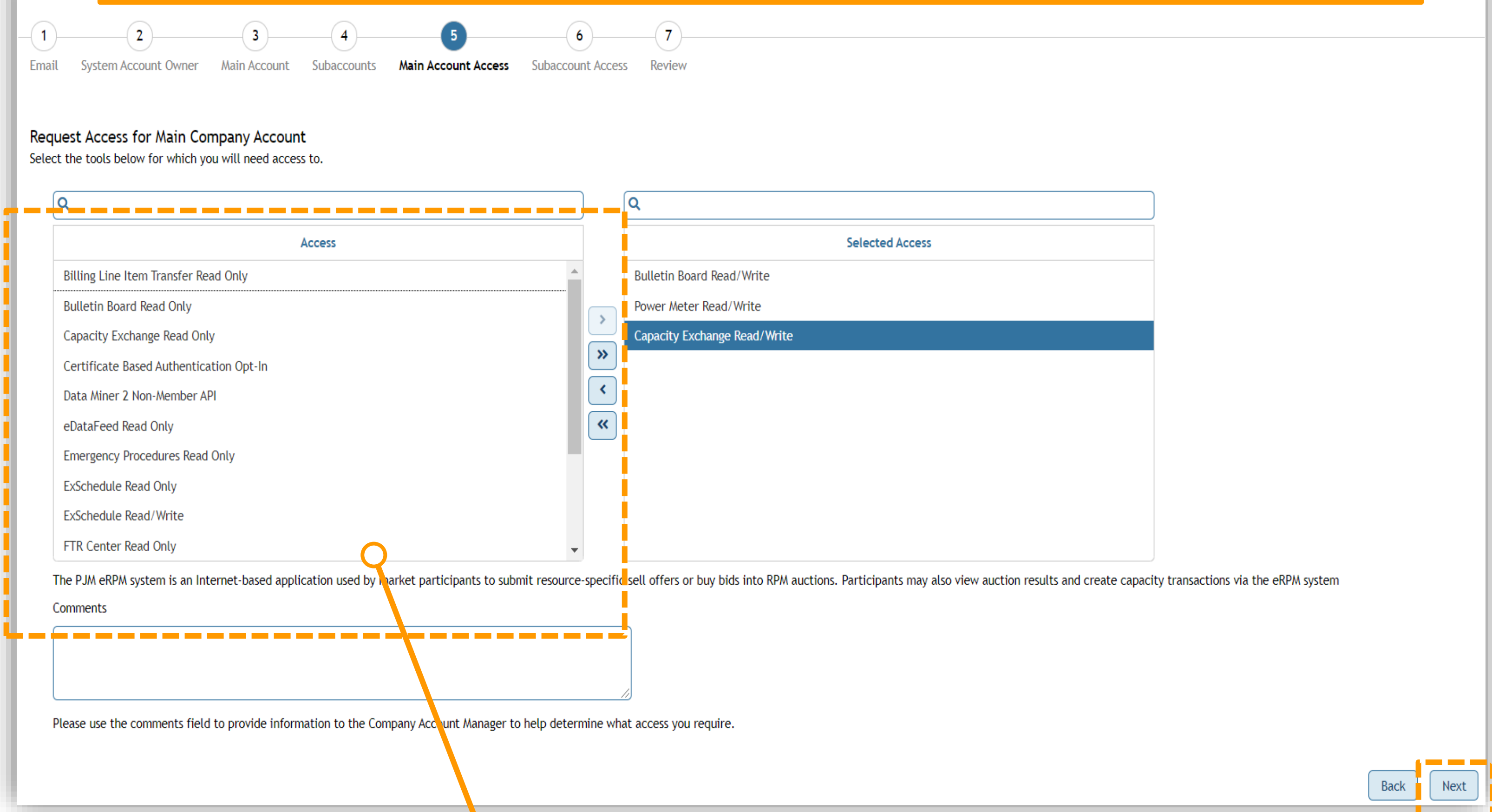


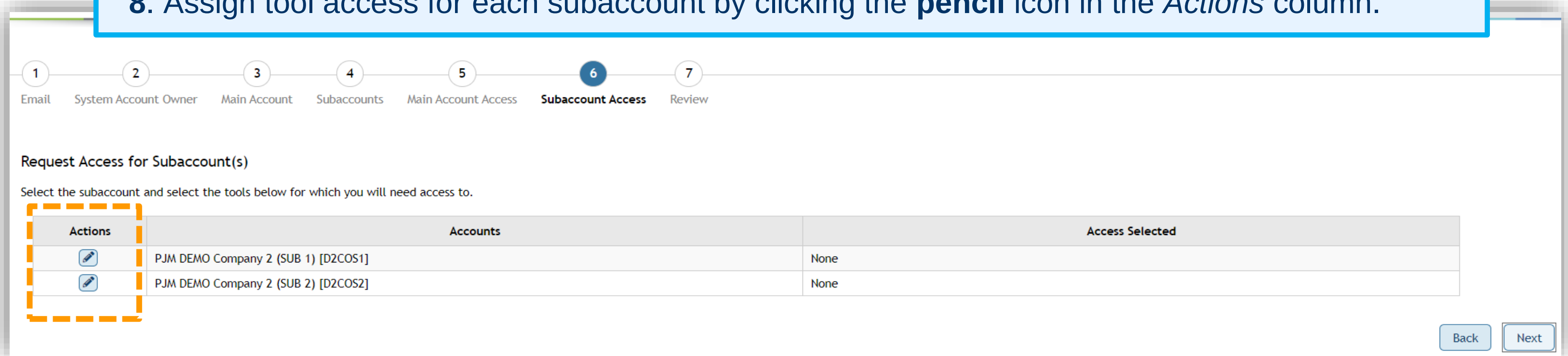
Figure 2

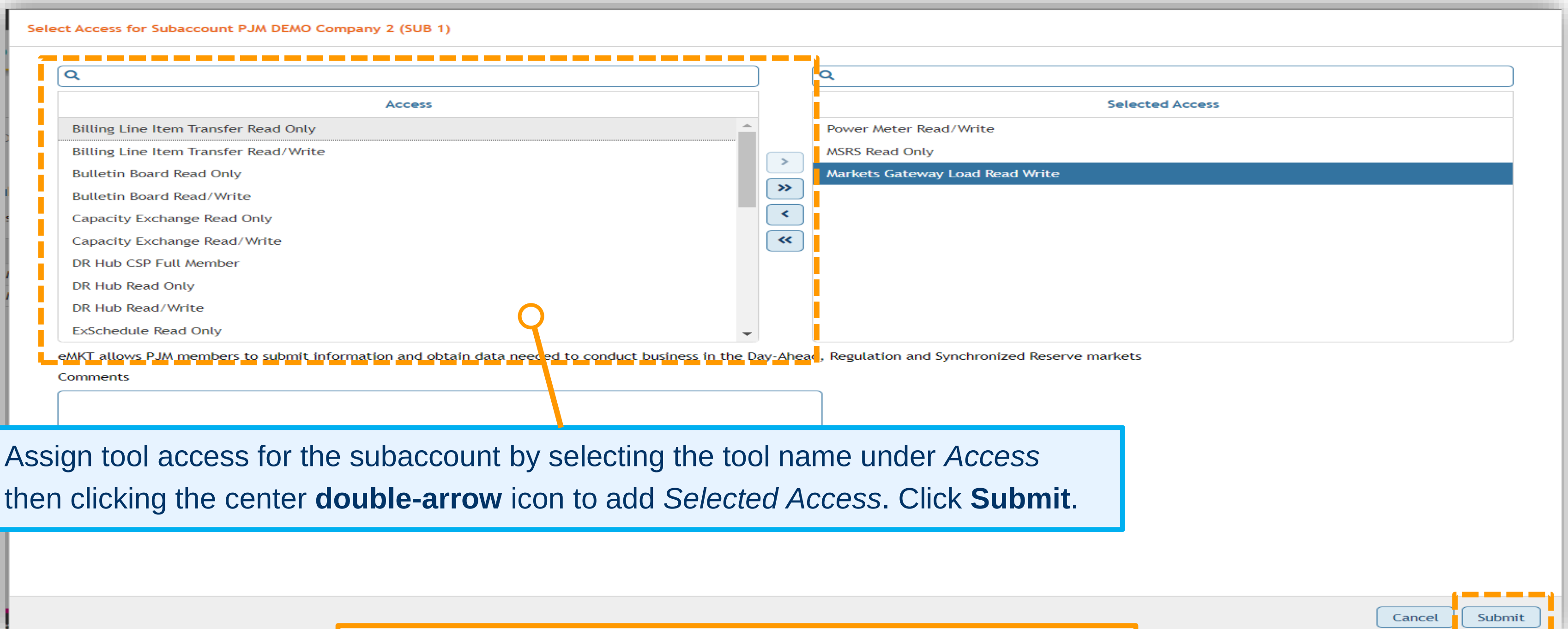


Only API tools will be displayed.

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

8. Assign tool access for each subaccount by clicking the **pencil** icon in the *Actions* column.

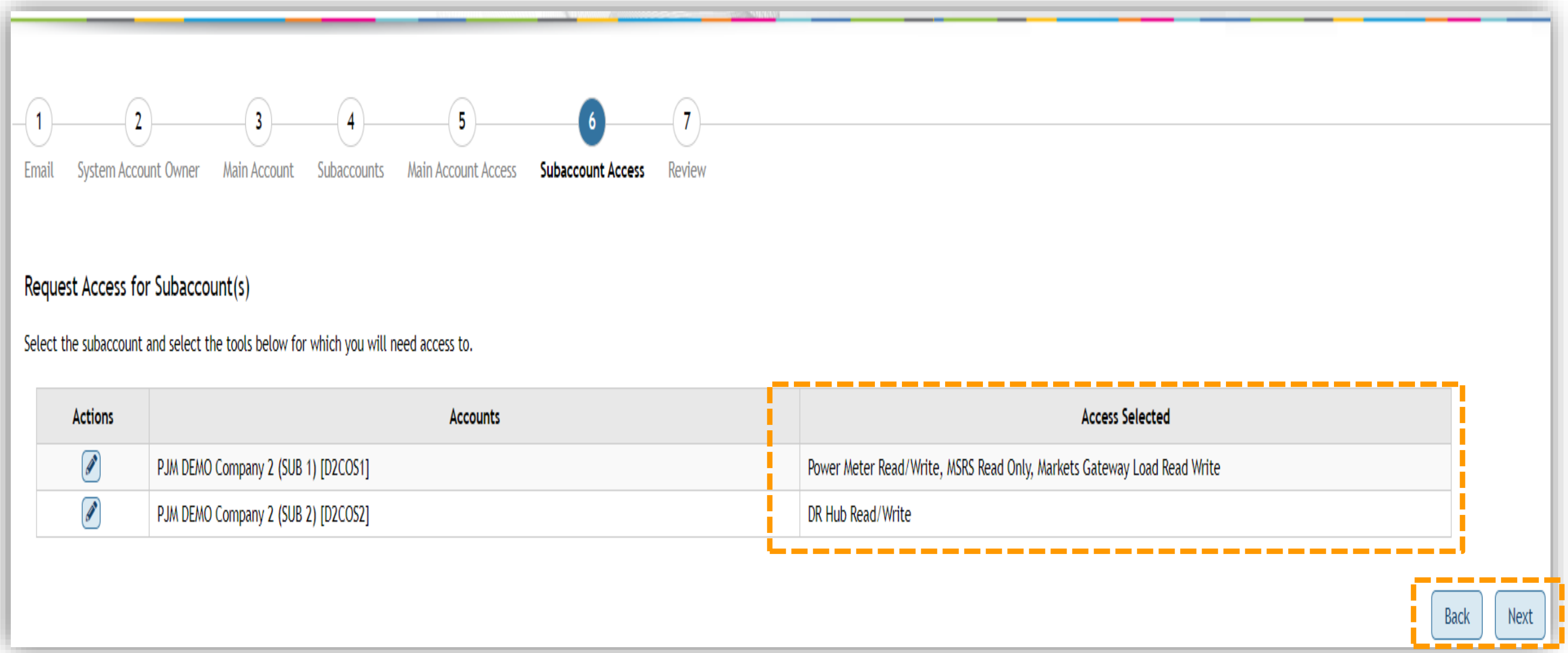




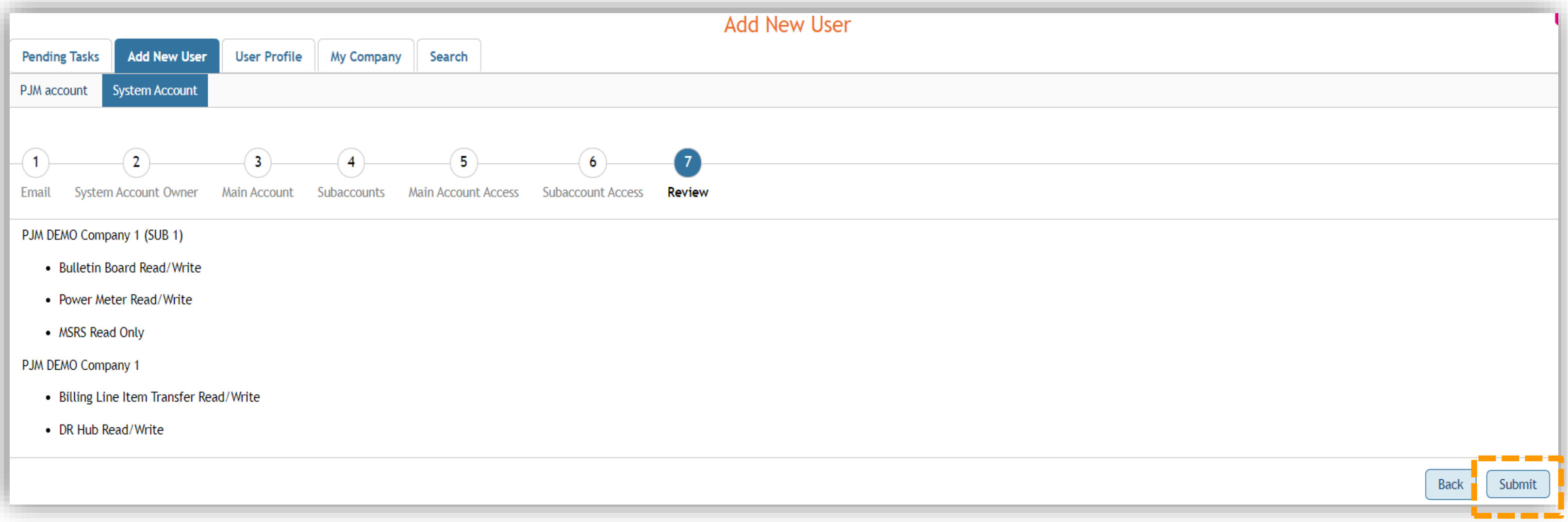
9. Assign tool access for the subaccount by selecting the tool name under *Access* then clicking the center **double-arrow** icon to add *Selected Access*. Click **Submit**.

Repeat Steps 8 & 9 for each additional subaccount.

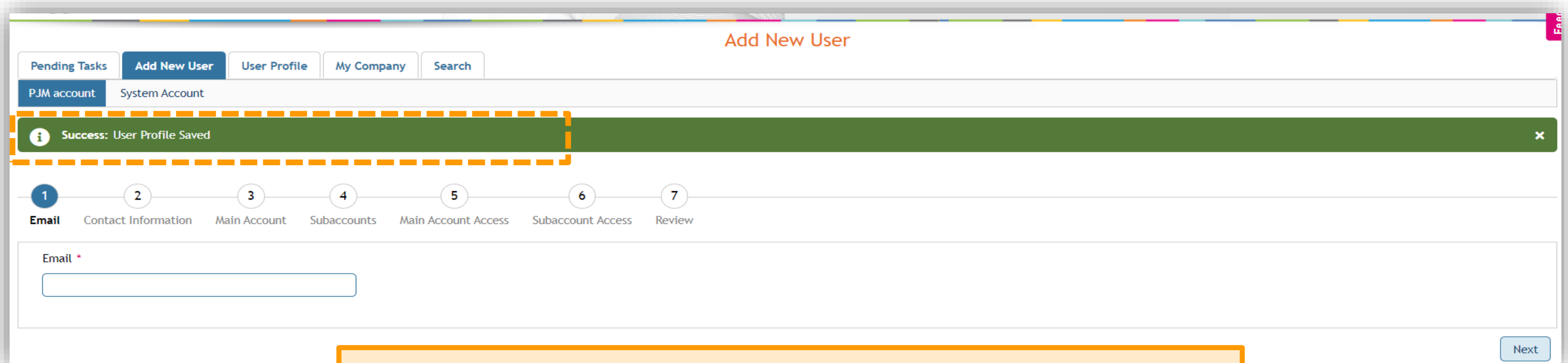
On the *Request Access for Subaccount(s)* screen, you can review the access selected for each subaccount. If you missed any tools, click the **Back** button. Follow the previous steps to select additional tools. When you have completed access selection, click **Next.**



On the *Review* screen, review all company accounts and accesses being granted to the new system account, and click **Submit** to finalize the request.



After submission, you will be taken back to the *Add New User* screen. It will also provide a notice that the new user profile has been saved. The new system account user will receive an automated email containing a link to set up a password for the newly created system account. **The password setup link expires four hours after issuance.**



Repeat the steps above for each additional system account.