

User Account Management Quick Guide



June 2021

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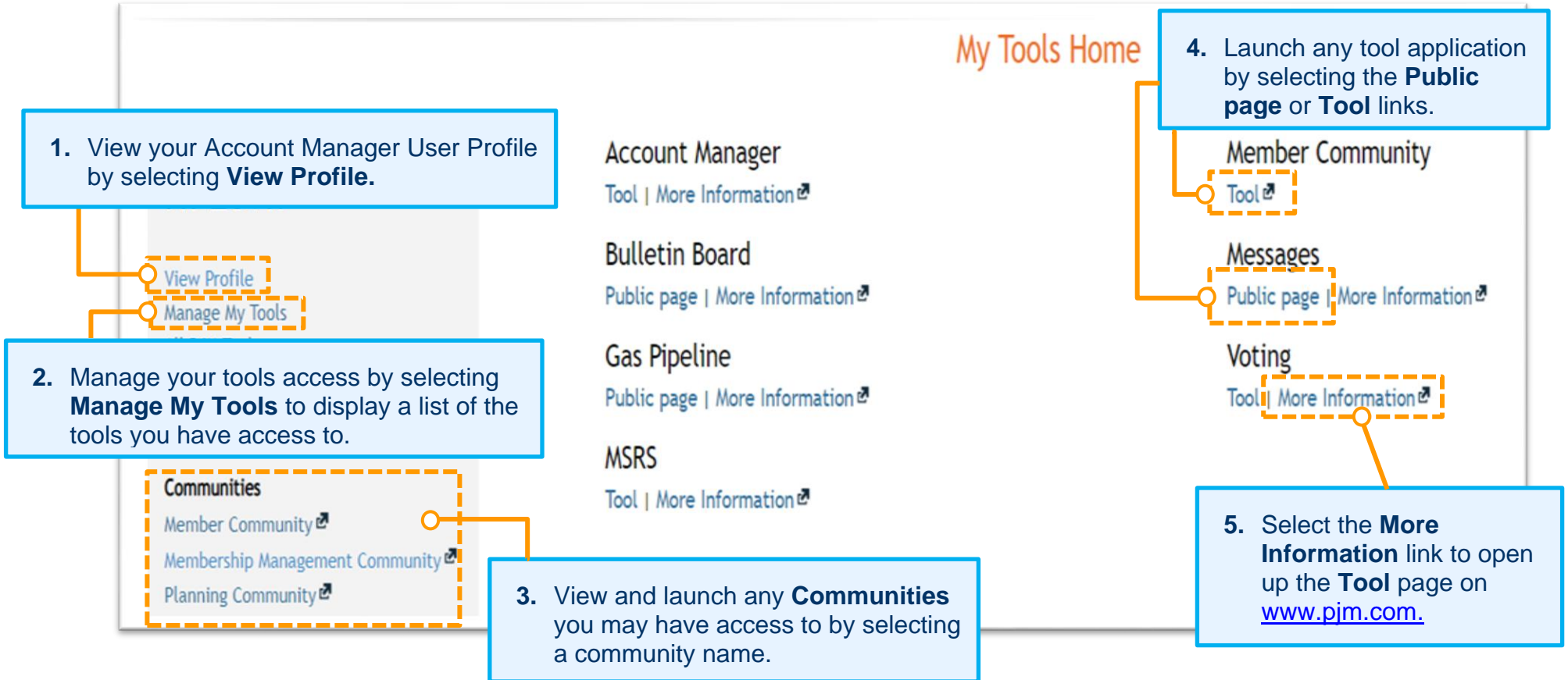
User Account Management

User Account Management

Once you have an established user account in Account Manager, you can manage your contact information and access to PJM Tools. The steps below show the different functions a user can perform on the **My Tools Home** page, **Account Manager User Profile Account Information** page, and the **Account Manager Account Access** page.

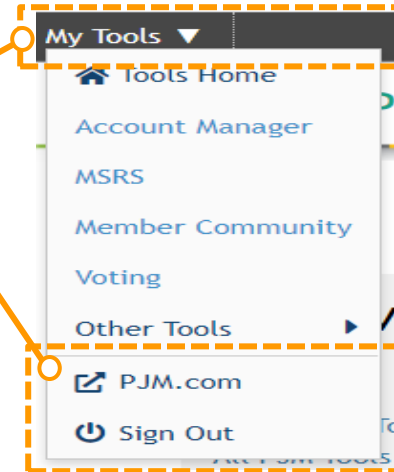
MY TOOLS HOME

Once you sign in to the **Account Manager Single Sign-On (SSO)** page, you will be directed to the PJM **My Tools Home** page. From this page, you can:



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Additionally, on the PJM **My Tools Home** page, there is a **My Tools** drop-down menu that provides another way for you to navigate to tools, a link to www.pjm.com and a link to **Sign Out** of the PJM **My Tools Home**.



User Profile – Account Information

On the **User Profile – Profile Information** page, you can manage your contact and profile information.

You can update:

- Job title
- Phone number
- Email address
- Employed-As field

However, the first name, last name, employer and username cannot be modified. There is a **Last Name Change** button you can select to request a last name change to be approved by your CAM administrator.

User Account Management

User Profile

Profile Information | Account Access | PKI Certificates

Contact Information

First Name *	<input type="text" value="Ally"/>	?	Employer *	<input type="text" value="PJM DEMO Company 2"/>
Last Name *	<input type="text" value="Electric"/>		Phone *	<input type="text" value="610-666-4545"/>
Job Title	<input type="text" value="TEST"/>		Email *	<input type="text" value="aelectric@pjm.com"/>
Employed as *	<input type="text" value="Employee"/>			<input type="button" value="Last Name Change"/>

You also have the ability to change your own password by clicking the **Change Password** button under the *Profile Information* section.

Profile Information

Username *

System Account

Terminate account.

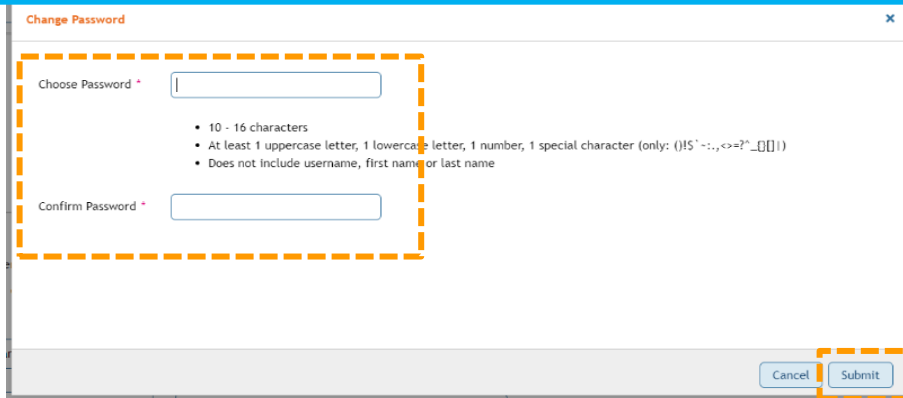
References

[Account Managers](#)

[History](#)

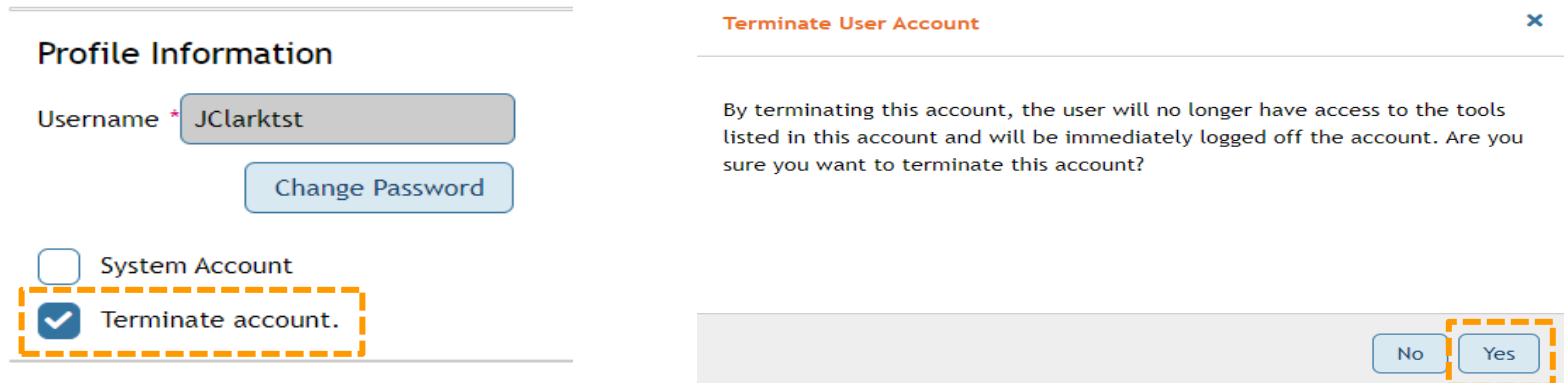
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In the **Change Password** pop-up box, **Choose Password** and **Confirm Password**, and then click **Submit** to finalize this request.



The image shows a 'Change Password' pop-up window. It contains two input fields: 'Choose Password' and 'Confirm Password'. Below the 'Choose Password' field, there are three bullet points: '10 - 16 characters', 'At least 1 uppercase letter, 1 lowercase letter, 1 number, 1 special character (only: (!\$%'-:;,.<=>?*~_[]{}))', and 'Does not include username, first name or last name'. At the bottom right of the window, there are two buttons: 'Cancel' and 'Submit'. The 'Submit' button is highlighted with a dashed orange border.

If you no longer require a user account or access to PJM Tools, terminate your account by clicking the check box before **Terminate account**, and then click **Submit**. The **Terminate User Account** confirmation box will appear. Click **Yes** to confirm this action.



The image shows two parts of a user interface. On the left is the 'Profile Information' section, which includes a 'Username' field with the value 'JClarktst' and a 'Change Password' button. Below this, there are two checkboxes: 'System Account' (unchecked) and 'Terminate account.' (checked). The 'Terminate account.' checkbox is highlighted with a dashed orange border. On the right is the 'Terminate User Account' confirmation box. It contains the text: 'By terminating this account, the user will no longer have access to the tools listed in this account and will be immediately logged off the account. Are you sure you want to terminate this account?'. At the bottom right of this box, there are two buttons: 'No' and 'Yes'. The 'Yes' button is highlighted with a dashed orange border.

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You can manage your security questions and answers to utilize the **Forgot Password** link on the sign-in screen. Click **Submit** if you updated your security questions and/or answers.

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 *

Q2 *

Q3 *

There is an additional **References** section on the **User Profile – Profile Information** page where you can select links to pages displaying your Company Account Managers (CAMs) and account History.

References

[Account Managers](#)

[History](#)

User Account Management

When you click the **Account Managers** link, the **Account Manager** page displays your CAM's contact information for your main company account.

Account ↕	First Name ↕	Last Name ↕	Phone ↕	Email ↕
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
PJM Training, LLC	Julissa	Craven	610-555-1212	j.craven@pjm.com
PJM Training, LLC	Levi	Smrekar	610-555-1212	ls@pjm.com

Please contact your CAM when you have questions or need assistance with your user account.

When you click the **History** link, the **History** page displays the history of actions taken on the user account (e.g., changes to contact information, password changes, tool access requests).

Timestamp ↕	Event ↕	Details	Updated By ↕
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
5/25/2021 10:16	Employed As Change	Changed employed as from Consultant to Contractor.	LSTRNSUMACAM
5/25/2021 10:15	Phone Number Change	Changed phone number from 215-555-5555 to 610-666-1212.	LSTRNSUMACAM
5/25/2021 10:14	Last Name Change	Changed last name from Plissken-Doh to Plissken.	LSTRNSUMACAM
5/25/2021 10:13	Last Name Change Approved	Approved last name change from Plissken to Plissken-Doh.	LSTRNSUMACAM
5/25/2021 10:13	Last Name Change Request	Requested last name change from Plissken to Plissken-Doh.	LSTRNSUMACAM
5/25/2021 10:12	Access Created	Granted Member Community Public access for PJMTR (Account ID: 3,006,024).	LSTRNSUMACAM
5/25/2021 10:12	Access Created	Granted System Map Read Only access for PJMTR (Account ID: 3,006,024).	LSTRNSUMACAM
5/25/2021 10:12	Access Created	Granted MSRS Read Only access for PJMTR (Account ID: 3,006,024).	LSTRNSUMACAM
5/25/2021 10:11	Employed As Change	Changed employed as from null to Consultant.	LSTRNSUMACAM
5/25/2021 09:04	Title Change	Changed title from fake to Tester.	LSTRNSUMACAM
3/20/2021 00:30	Locked	Account locked by password expired.	SYSTEM
11/11/2020 15:13	Password Reset	Password was reset.	JACROWNTRN
11/11/2020 15:12	Unlocked	Account unlocked.	JACROWNTRN
11/10/2020 13:50	Locked	Account locked by Admin.	LSTRNSUMACAM
11/10/2020 13:50	Password Reset	Password was reset.	LSTRNSUMACAM

Records Per Page: << < (1 of 4) > >>

User Account Management

User Profile – Account Access

On the **User Profile – Account Access** page, you can manage your account access. You will have the ability to view and manage your current access in the data tables.

Account Access

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

Request Access

Account ID	Account	Account Shortname	Actions
1881084	PJM DEMO Company 2	DEMCO2	

Tool	Access Type	Effective Date	Terminate Date	Actions
Member Community	Public	12/08/2020	12/31/9999	
PJM	Public	12/08/2020	12/31/9999	

Edit your existing access by clicking the **pencil** icon next to the tool and submit a **Request Access Level Change** using the drop-down menu. You can also submit comments to provide justification for the request to your CAM. Click **Submit**.

Request Access Level Change

Tool: Planning Center

Current Access: Gen Model Read Only

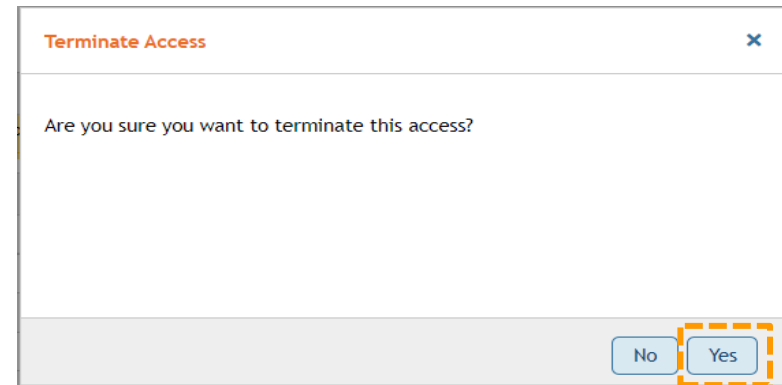
Request Access Change: Gen Model Read Write

Comments:

Cancel Submit

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Terminate Access by clicking the **trash can** icon next to the tool for which you no longer require access. You will be prompted to validate this request by clicking **Yes**.



You can request additional tool access for your account by clicking the **Request Access** button.

User Profile

Profile Information Account Access PKI Certificates

Account Access

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

Account ID	Account	Account Shortname	Actions
1881084	PJM DEMO Company 2	DEMCO2	

Tool	Access Type	Effective Date	Terminate Date	Actions
Member Community	Public	12/08/2020	12/31/9999	
PJM	Public	12/08/2020	12/31/9999	

Request Access

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You will be redirected to the **Request Access** page, where you can select additional access.

Request Access

Accounts

PJM DEMO Company 2 [DEMC02]

Add Accounts

Access

Selected Access

Comments

Please use the comments field to provide information to the Company Account Manager to help determine what access you require.

Next

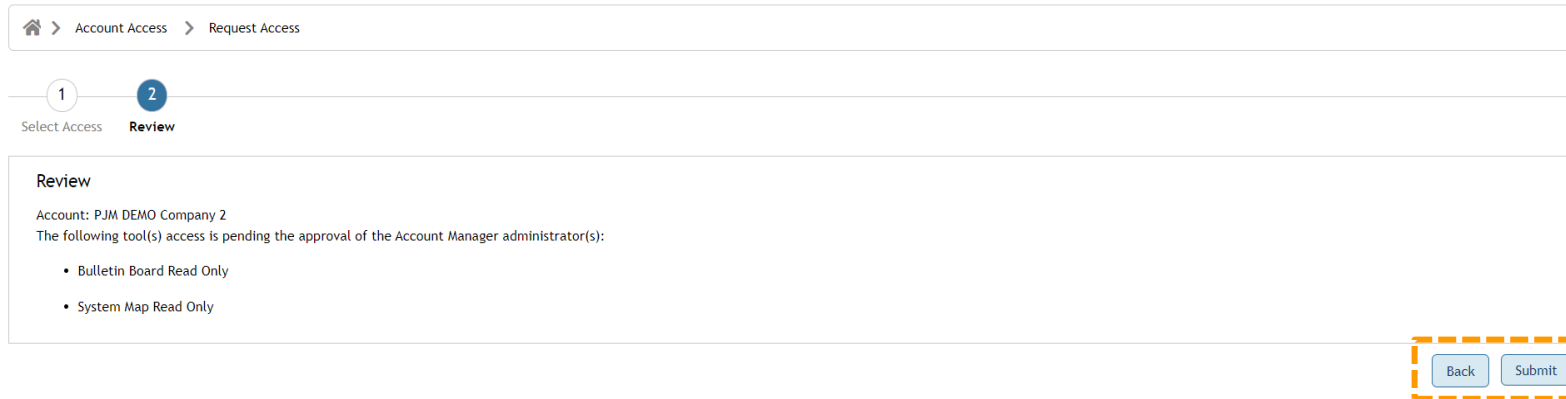
Feedback

Tool availability is dependent upon your company's line of business with PJM.

Select tool access under the *Access* column, then click the center **double-arrow** icon to add it to the *Selected Access* column. When you have completed selecting additional access, click **Next** to proceed.

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On the **Review** screen, review tool access selected. If you missed any tools, click the **Back** button. Follow the previous steps to select additional access, and then click **Submit** to finalize this request.



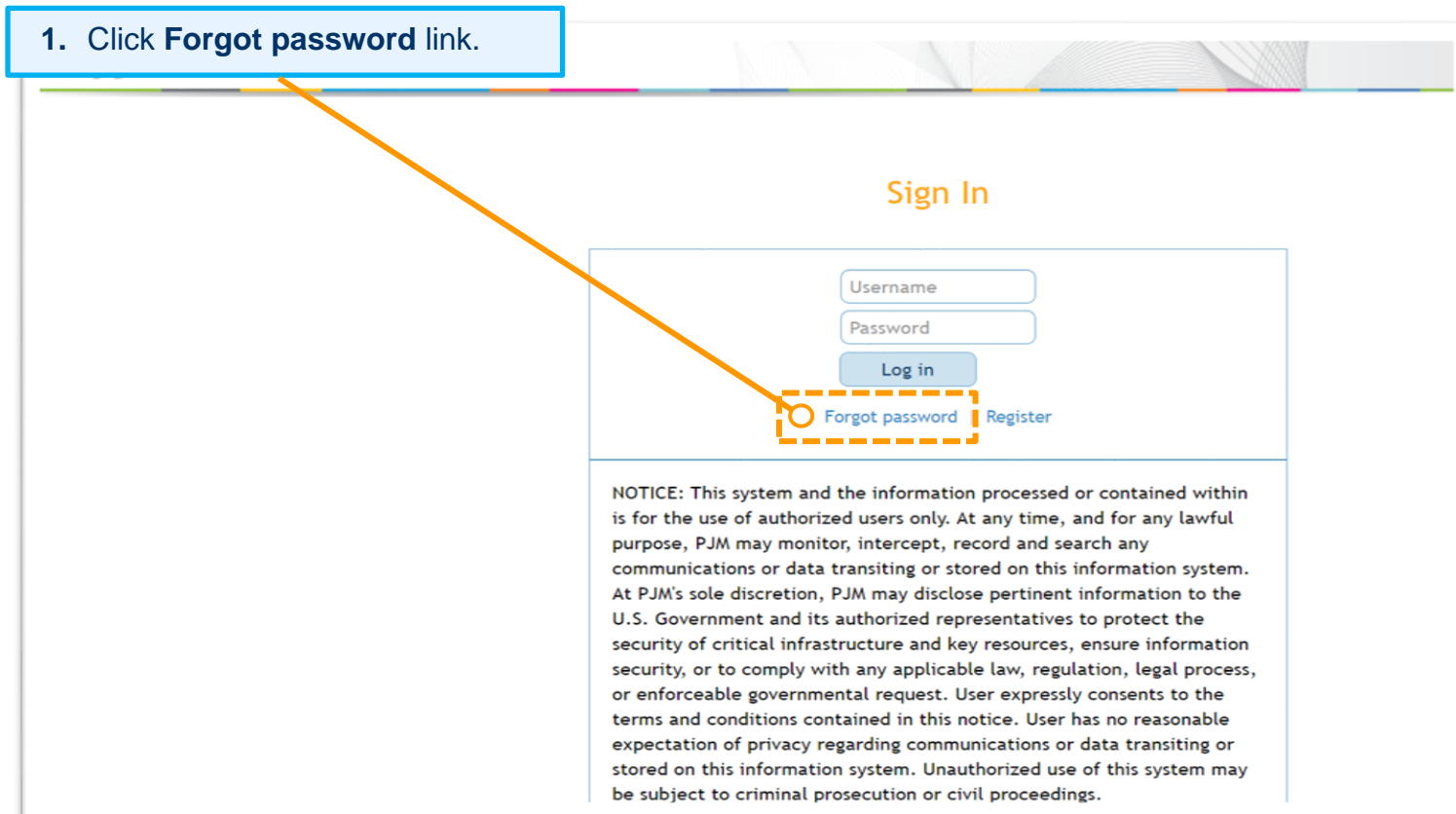
You will receive the following success message after submitting the request. Any additional access will be pending your CAM's approval prior to use.



Please contact your CAM if you have questions or need assistance for any new or pending access requests.

Reset Password Using Forgot Password Link

Users may request to reset their own account password by selecting the **Forgot password** link on the **Sign-In** page. To enable the self-service password reset feature, you must have security questions and answers saved. If your user account was created prior to this feature, you can set your security questions/answers on the **Profile Information** page in Account Manager.



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2. Enter your username, and click **Submit**.

The screenshot shows the 'Forgot Password' form. At the top left is the 'pjm | Account Manager' logo. The form title is 'Forgot Password'. Below the title is a text input field labeled 'Please enter your username *' containing a single character. To the right of this field is a 'Submit' button. Both the input field and the button are enclosed in orange dashed boxes.

3. Enter the answers to your two security questions, then click **Submit Answers**.

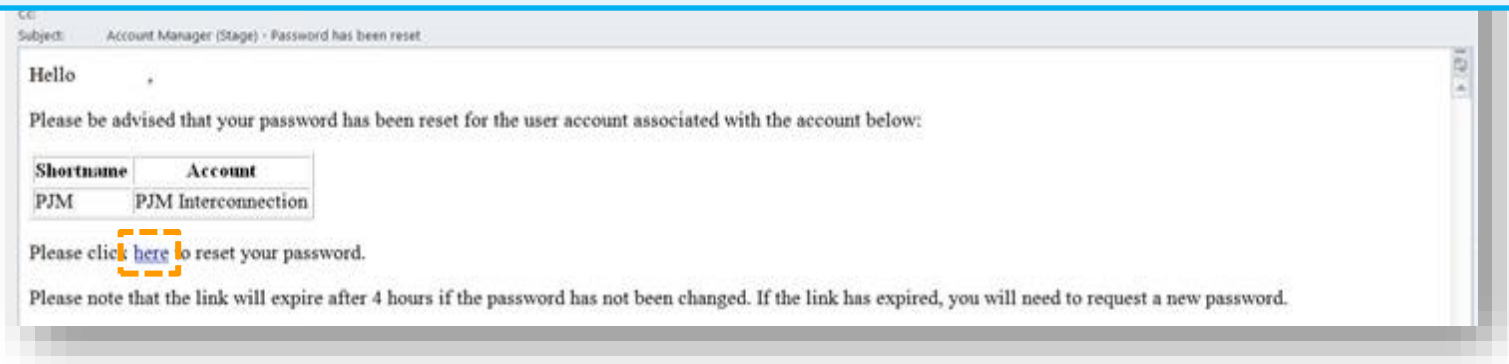
The screenshot shows the 'Forgot Password' form with the security questions section highlighted. The form title is 'Forgot Password'. The first section contains the text 'Please enter your username *' and a text input field containing 'XXXXXXXX'. To the right of this field is a 'Submit' button. Below this is a section with two security questions: 'What is the name of your current pet?' and 'What is your Dad's middle name?'. Each question has a corresponding text input field. To the right of these fields is a 'Submit Answers' button. The entire security questions section and the 'Submit Answers' button are enclosed in orange dashed boxes.

4. You will receive the following message if your security questions were answered correctly.

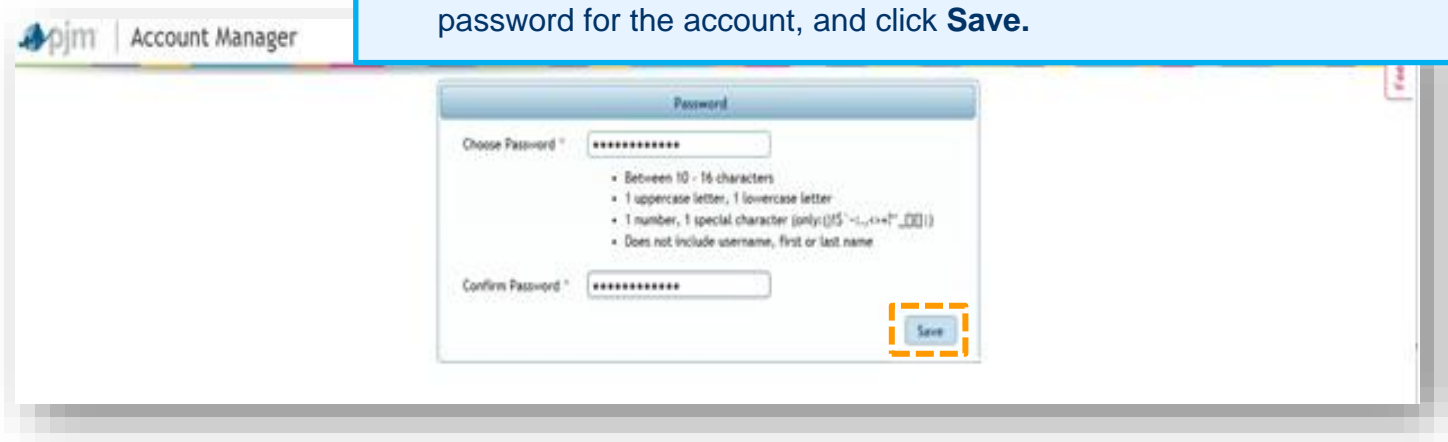
The screenshot shows the 'Account Manager' page. At the top left is the 'pjm | Account Manager' logo. Below the logo is a message box with the text: 'Thank you for your request. You will receive an email to create your password. Please [Contact PJM](#) if you have any questions regarding your account.' To the right of the message box is a vertical 'Feedback' button.

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5. Check your inbox for an automated email to reset your password. Click on the **here** link in the email to reset.

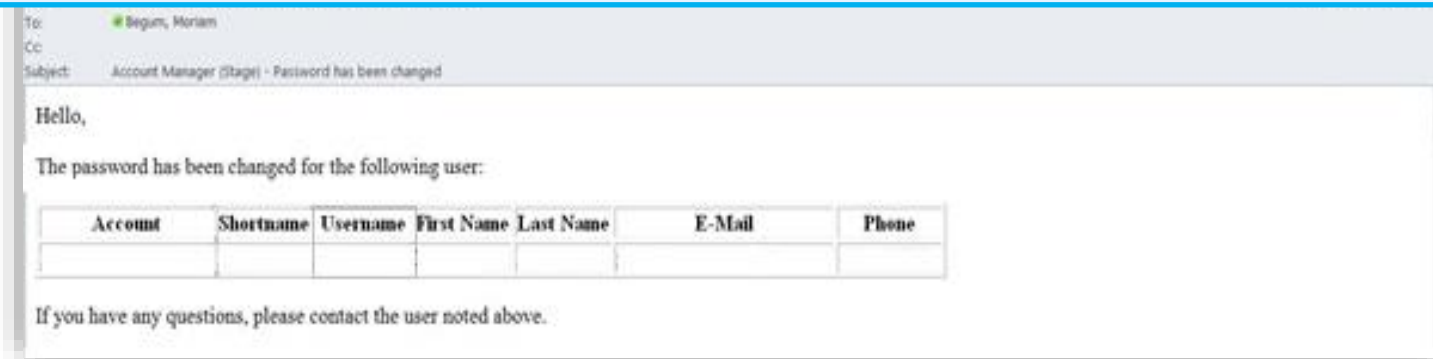


6. After clicking on the link in the email, you will see this screen. Enter a new password for the account, and click **Save**.



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7. You will get an email confirmation that your password was changed, and you should now be able to log in with the new password.



Multifactor Authentication

Multifactor Authentication (MFA) is a feature that adds an extra layer of protection by requiring more than one method of authentication. The first authentication step is to enter the user ID and password. Upon successful login, there will be a prompt for a soft token (also known as a one-time password).

SOFT TOKEN/ONE-TIME PASSWORD

The soft token is PJM’s implementation of the second authentication factor. It is a randomly generated eight-digit number that is sent to the email address associated with the user ID in Account Manager. The soft token expires 10 minutes from the time it was emailed. A user can request a new soft token or sign out of the **Soft Token** page. Once a user authenticates through this double-authentication method, the user will not be asked to enter a soft token again for that device.

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A maximum of five device profiles per user can be stored. If a sixth device profile is detected, the oldest profile will be removed from the list, and the user will have to enter a soft token again in order to access the application from that device.

Device profiles are based on the following attributes:

- Browser (Edge vs. Chrome)
- Installed font sizes
- Installed system resolution
- Device time zone

If a user signs out from the **Soft Token** page, they will be redirected to the main tools login page.

HOW TO LOG IN USING MFA

Single Sign-On

Sign in

Username:

Password:

[Sign In](#)

[Forgot Password](#)

[Register](#)

NOTICE: This system and the information processed or contained within is for the use of authorized users only. At any time, and for any lawful purpose, PJM may monitor, intercept, record and search any communications or data transiting or stored on this information system, and may disclose such communications or data to the U.S. Government and its authorized representatives. Anyone using this system expressly consents to the terms and conditions contained in this notice. Individuals using this computer system without authority, or in excess of their authority, are advised that if monitoring reveals possible improper or criminal activity, system personnel may provide the

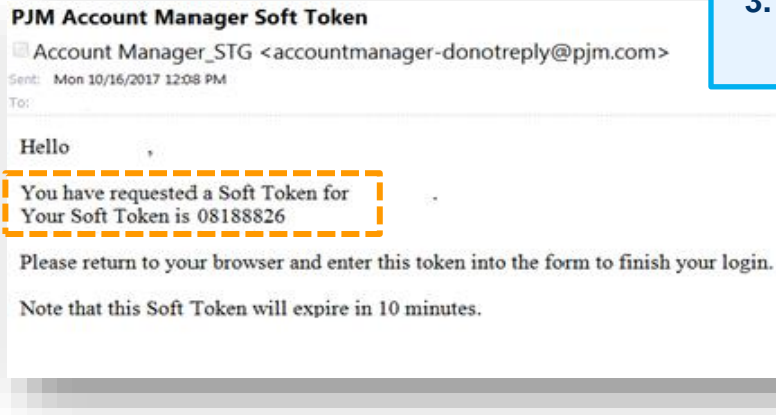
1. Log in to Account Manager by entering your case-sensitive username and password combination on the *Single Sign-On* screen. Then click the **Sign-In** button.

User Account Management

2. After a successful login, you will be prompted to **Enter Soft Token.**

The screenshot shows a web form titled "Enter Soft Token". At the top, it says "Check your email and enter the soft token provided in the form below. The email may take some time to arrive. Be sure to check your spam/junk folder." Below this is a text input field labeled "Soft Token:". Underneath the field are two buttons: "Finish Login" and "Sign Out". Below the buttons is a link that says "Request New Soft Token". At the bottom of the form is a "NOTICE" section with the following text: "NOTICE: This system and the information processed or contained within is for the use of authorized users only. At any time, and for any lawful purpose, PJM may monitor, intercept, record and search any communications or data transiting or stored on this information system. At PJM's sole discretion, PJM may disclose pertinent information to the U.S. Government and its authorized representatives to protect the security of critical infrastructure and key resources, ensure information security, or to comply with any applicable law, regulation, legal process, or enforceable governmental request. User expressly consents to the terms and conditions contained in this notice. User has no reasonable expectation of privacy regarding communications or data transiting or stored on this information system. Unauthorized use of this system may be subject to criminal prosecution or civil proceedings."

3. Check your email associated with user account in Account Manager for the soft token.



Please check your spam/junk folder if the automated soft token email is not in your inbox before clicking **Request New Soft Token** link.

4. Copy the soft token from the email and paste it in the Soft Token box.

The screenshot shows a web page titled "Enter Soft Token". At the top, it says "Check your email and enter the soft token provided in the form below. The email may take some time to arrive. Be sure to check your spam/junk folder." Below this is a form with a "Soft Token:" label and a text input field containing seven dots. An orange dashed box highlights this input field, with a line pointing to the instruction box above. Below the input field are two buttons: "Finish Login" and "Sign Out". An orange dashed box highlights the "Finish Login" button, with a line pointing to the instruction box below. Below the buttons is a link that says "Request New Soft Token". At the bottom of the page is a "NOTICE" section with several lines of text regarding system security and user consent.

5. Click **Finish Login** to gain access to Account Manager.