Account Manager Refresh – CAM Feedback

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Disclaimer: While materials are current at the time of publishing, applicable requirements may change. PJM Governing Documents control.

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Account Manager Refresh

- **Overview:** Modernizing the application to deliver a more intuitive user experience, streamline business processes, enhance security protocols, and improve overall functionality.
- **Refresh Target Timeline:** 2028
- **Your Input Matters:** We are seeking participation from Company Account Managers (CAMs) in this dedicated feedback session to gather insights and identify opportunities for improvement.
- **Topic-Based Discussion:** Each topic will be allotted a designated amount of time for feedback and discussion to ensure everyone has an opportunity to share their input while allowing us to address all planned topics.

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Account Manager Refresh Feedback Topic #1

- User/System Account Creation (10 minutes)
  - CAM created accounts
  - Individual created accounts (user or system)
  - API for user registration

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Account Manager Refresh Feedback Topic #2

- User/System Account Management (10 minutes)
  - Tool access provisioning/removals
  - Locking/unlocking accounts
  - Password requirements
  - Profile changes
  - Account Terminations
  - SUMA functionality
  - Stakeholder Profile

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Account Manager Refresh Feedback Topic #3

- Search Functionality (5 minutes)
  - User Search
  - System Account Search
  - Access Search
  - Filters

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Account Manager Refresh Feedback Topic #4

- Pending Tasks Dashboard/Tab (5 minutes)
  - User access requests
  - User requests
  - PKI Certificate requests
  - Email notification for outstanding requests

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Account Manager Refresh Feedback Topic #5

- User Certification (5 minutes)
  - View
  - Functionality

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Account Manager Refresh Feedback Topic #6

- Reporting Functionality (5 minutes)
  - CSV reports for pulling user access

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Account Manager Refresh Feedback Topic #7

- Subaccount Management (10 minutes)
  - Tool access available
  - Requesting tool access as a user

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Account Manager Refresh Feedback Topic #8

- PKI Certificate Process (5 minutes)
  - Obtaining a certificate
  - Uploading a certificate
  - Renewing a certificate

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Account Manager Refresh Feedback Topic #9

- My Company Management (5 minutes)
  - Allowlist set up and maintenance
  - Access requests
  - History

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Next Steps/Closing Notes

- Additional feedback - Please scan the QR Code below to complete our feedback survey:

- More information and updates regarding the Account Manager Refresh will be provided in future Tech Change Forum sessions.
- Questions?

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Contact

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