

Allowlist Quick Guide



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Allowlist Overview

The allowlist feature enables Company Account Managers (CAMs) to create a list of email addresses or company domains allowed to associate with new user accounts for the company account(s) they manage.

By default, allowlists will be empty for all companies until email addresses or domains are added by the CAMs. For security purposes, PJM requires all CAMs and SUMA CAMs to maintain allowlists for the companies they manage.

For added security, once an allowlist is created, individuals are restricted from creating a new user account for that company if their credentials do not match the specified account allowlist(s).

Who Can Add/Maintain Company Allowlist(s)

- Single-account CAMs are able to add an allowlist for the company account that they manage.
- SUMA CAMs are able to add an allowlist for all company accounts that they manage.

Important Tips for Allowlisting

- **DO NOT** add public email domains such as “gmail.com,” “yahoo.com,” etc. to an allowlist. Any user with an email address from one of these domains would then be able to create an account under that company. If an authorized user has this category of email address, allowlist the exact authorized email address in the Email Prefix and Domain fields.
- When adding agents or consultants, add the exact authorized email address for each user in the Email Prefix and Domain fields.

Adding just a domain means any user – authorized or not – with an email address on that domain can create a user account for your company account(s).

- If a company domain changes, you must update the allowlist prior to updating the email address in the associated user profile.
- Keep allowlists up to date. Delete email addresses or email domains that are no longer needed.
- When entering a domain, **DO NOT** add the “@”symbol prior to the domain. That will generate the following error:

The screenshot shows a web application interface with a navigation bar at the top containing tabs for 'User Certification', 'Pending Tasks', 'Add New User', 'User Profile', 'My Company', 'Search', and 'eDART CDW'. Below the navigation bar is a sub-menu with 'Access', 'Account Managers', 'History', and 'Allowlist'. The 'Allowlist' tab is active. A red error banner is displayed, stating: 'Error: "Please enter a valid domain entry. Allowed characters are -. _A-Za-z0-9"'. Below the error banner, the 'Allowlist Emails' section is visible. It contains two input fields: 'Email Prefix' and 'Domain *'. The 'Domain *' field contains '@myco.com'. To the right of the 'Domain *' field is an '@' symbol. Below the input fields are three buttons: 'Add', 'Clear', and 'Delete All'.

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Getting Started

For all allowlist actions, sign in to your CAM or SUMA CAM user account and click the “**My Company**” tab, then click the “**Allowlist**” subtab.

How to Allowlist as a CAM for a Single Company Account

1. Fill in the complete email address in the Email Prefix and Domain fields to authorize specific users, or just the Domain field to allow any user from that company domain to create a user account

The screenshot shows a web interface for managing an allowlist. At the top, there are two input fields: "Email Prefix" and "Domain". The "Domain" field contains "pjm.com". To the right of these fields are "Add" and "Clear" buttons. A dashed orange box highlights the "Email Prefix" and "Domain" fields, with a callout box labeled "1. Fill in the complete email address...". Another dashed orange box highlights the "Add" button, with a callout box labeled "2. Click Add". Below the input fields is a table with columns: "Account", "Email Prefix", "Domain", and "Actions". The table contains four rows of data. At the bottom of the table, there is a pagination control showing "Records Per Page: 15" and "1-4 of 4 records".

Account	Email Prefix	Domain	Actions
PJM Training (Subaccount 1)		@pjmtst.com	
PJM Training (Subaccount 1)	pjmtst	@pjmrn.com	
PJM Training (Subaccount 1)		@pjm.com	
PJM Training (Subaccount 1)	sonso	@gmail.com	

Repeat Steps 1 and 2 for each additional allowlist entry.

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How to Allowlist as a SUMA CAM

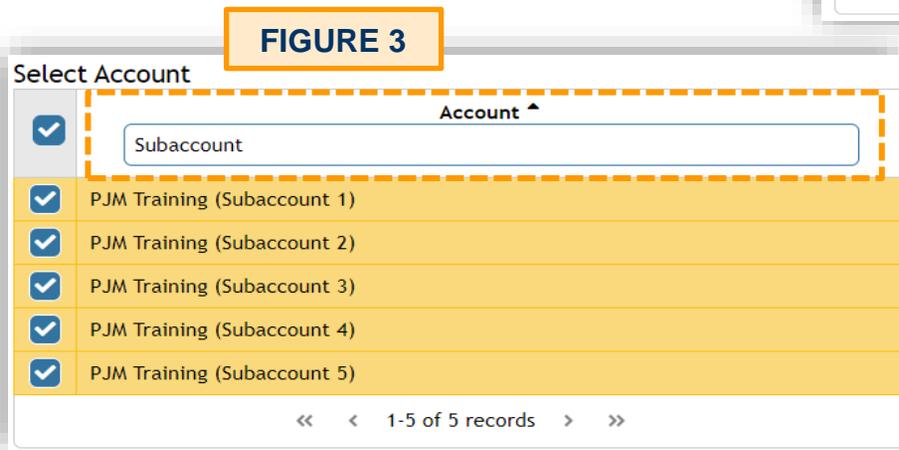
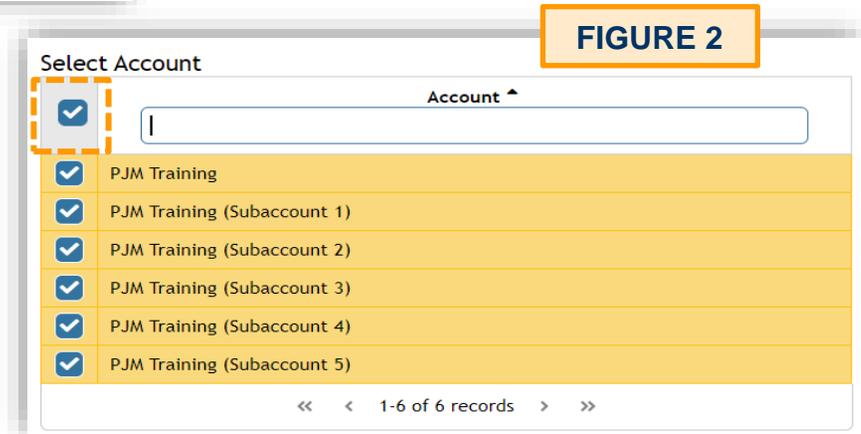
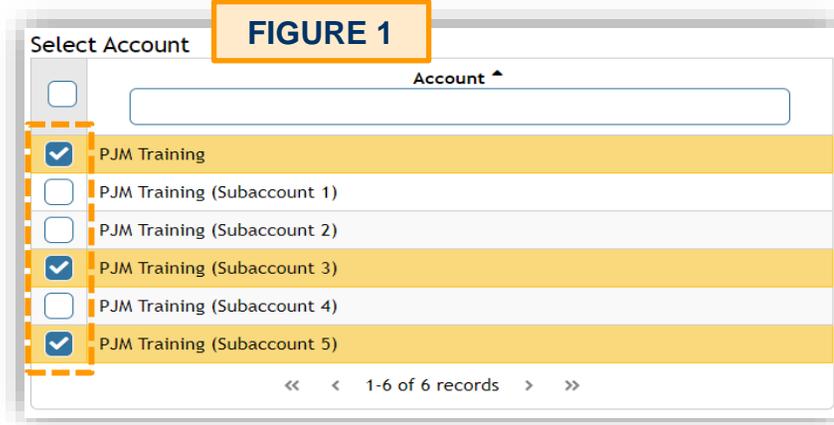
The screenshot shows the top navigation bar with tabs for 'User Certification', 'Pending Tasks', 'Add New User', 'User Profile', and 'My Company'. Below this is a secondary bar with 'Access', 'Account Managers', 'History', and 'Allowlist'. A callout box points to the 'My Company' tab and the 'Allowlist' button, with the text: 'Click My Company then Click Allowlist'. Below the navigation is a 'Select Account' section with a list of accounts and checkboxes. To the right is the 'Allowlist Emails' section with input fields for 'Email Prefix' and 'Domain', and buttons for 'Add', 'Clear', and 'Delete All'. Below that is a table with columns for 'Account', 'Email Prefix', 'Domain', and 'Actions', and a 'Records Per Page' dropdown set to 15.

The screenshot shows the 'Non-Compliant Users' section. It features a table with columns: 'Account', 'First Name', 'Last Name', 'Username', 'Email Address', and 'Phone'. There are input boxes for each column. Below the table, it says 'No records found.' and 'Records Per Page: 15'. There is also an 'Add to Allowlist' button in the top right corner.

SELECT ACCOUNT BOXES

Use the checkboxes to select one or more accounts (**FIGURE 1**) or all accounts (**FIGURE 2**). Use the Account Name box to filter Accounts by name (**FIGURE 3**)

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1. Fill in the complete email address in the **Email Prefix and Domain** fields to authorize specific users, or **just the Domain** field to allow any user from that company domain to create a user account.

The screenshot shows the 'Allowlist Emails' interface. At the top, there is a navigation bar with tabs: 'User Certification', 'Pending Tasks', 'Add New User', 'User Profile', 'My Company' (selected), 'Search', and 'eDART CDW'. Below this is a sub-navigation bar with 'Access', 'Account Managers', 'History', and 'Allowlist' (selected). The main area is titled 'Allowlist Emails'. It features two input fields: 'Email Prefix' and 'Domain *'. The 'Domain' field contains 'pjm.com'. An '@' symbol is positioned between the fields. To the right of the input fields are three buttons: 'Add', 'Clear', and 'Delete All'. A callout box labeled '2. Click Add' points to the 'Add' button. Below the input fields is a table with columns: 'Account ^', 'Email Prefix ^', 'Domain ^', and 'Actions'. The table contains one row with the following data: 'PJM Interconnection', an empty 'Email Prefix' field, '@pjm.com', and a trash icon. At the bottom of the table, there is a pagination control showing 'Records Per Page: 15', navigation arrows, and '1-1 of 1 records', along with a 'Reset' button.

Select additional company accounts as needed, and then repeat Steps 1 and 2 for each additional Allowlist Email entry.

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Non-Compliant User List

After you add your allowlist entries, you may notice a list appear under the Non-Compliant Users section. These user accounts were created prior to a CAM adding an allowlist entry and do not match the current allowlisted domains. These user accounts will remain active and retain access to the tools that were previously provisioned to their account.

1. Please review all **Non-Compliant Users**.
2. Please terminate any user account(s) that are not currently affiliated with the company or no longer applicable.
3. If the user account(s) are currently affiliated with your company, you can either add their domain to the allowlist by following the steps above or select one, multiple, or all entries from the Non-Complaint Users list to add their specific email addresses to the allowlist (See Below).

The screenshot shows a table titled "Non-Compliant Users" with columns for Account, First Name, Last Name, Username, Email Address, and Phone. Three users are listed: Charlie Brown (charbro@gmail.com), Jacob Dorenblazer (jcd@vzco.com), and Rooney McMurphy (r.mcmurph@gmail.com). Callouts indicate that a white box in the Account column can select all users, and individual white boxes can select specific users to be added to the allowlist via an "Add to Allowlist" button.

Account ^	First Name ⇅	Last Name ⇅	Username ^	Email Address ⇅	Phone ⇅
<input type="checkbox"/>					
<input type="checkbox"/> PJM DEMO Company 1	Charlie	Brown	CB3522demo	charbro@gmail.com	610-555-1212
<input type="checkbox"/> PJM DEMO Company 1	Jacob	Dorenblazer	JCTEST3522MR	jcd@vzco.com	610-555-1212
<input type="checkbox"/> PJM Training, LLC	Rooney	McMurphy	OTH3522DEMO	r.mcmurph@gmail.com	610-555-1212

How to Delete Allowlist Entries

1. SUMA CAMs > Select Account(s)
(CAMs proceed to Step 3)

2. Filter the Allowlist Emails box by account, email prefix or domain

3. Click the **trash can** icon in the Actions column next to the email address or domain you need to delete

4. Click **Submit** in the pop-up box to finalize

The screenshot shows the 'Select Account' dropdown menu on the left, which is highlighted with a dashed orange box. The 'Allowlist Emails' table on the right is also highlighted with a dashed orange box. The table has columns for 'Account', 'Email Prefix', 'Domain', and 'Actions'. The 'Domain' column is filtered to show '@gmail.com'. The 'Actions' column contains trash can icons. Below the table, there are pagination controls showing 'Records Per Page: 15' and '1-3 of 3 records'. The 'Add', 'Clear', and 'Delete All' buttons are visible above the table.

Account	Email Prefix	Domain	Actions
PJM DEMO Company 1	charbro	@gmail.com	
PJM DEMO Company 1 (SUB 1)	charbro	@gmail.com	
PJM DEMO Company 1 (SUB 2)	charbro	@gmail.com	

The screenshot shows a pop-up dialog box titled 'Delete Allowlist Email'. The text inside reads: 'Are you sure you want to remove charbro@gmail.com from the allowlist?'. At the bottom of the dialog, there are two buttons: 'Cancel' and 'Submit'. The 'Submit' button is highlighted with a dashed orange box.

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- 5. Repeat these steps as needed if you have additional email addresses or domains to delete.
- 6. If you need to delete all or many of the allowlist list entries, you can select the account(s) this action applies to.
 - A. Select Accounts (All - single white box top left corner or individually white boxes before account name)
 - B. Filter the Allowlist Emails box by account, email prefix or domain as needed
 - C. Click the Delete All button

The screenshot shows the 'Select Account' panel on the left and the 'Allowlist Emails' panel on the right. In the 'Select Account' panel, a box labeled 'A' highlights the top-left corner and the checkboxes for 'PJM DEMO Company 1' and 'PJM DEMO Company 1 (SUB 2)'. In the 'Allowlist Emails' panel, a box labeled 'B' highlights the 'Email Prefix' and 'Domain' input fields, and another box labeled 'C' highlights the 'Delete All' button. Below the input fields is a table with columns for 'Account', 'Email Prefix', 'Domain', and 'Actions'. The table contains three rows of data. At the bottom of the table, there is a 'Records Per Page' dropdown set to 15 and a 'Reset' button.

Account	Email Prefix	Domain	Actions
PJM DEMO Company 1	charbro	@gmail.com	
PJM DEMO Company 1 (SUB 2)	charbro	@gmail.com	
PJM Training, LLC	r.mcmurph	@gmail.com	

7. Click **Yes** in the pop-up box to finalize the action

The screenshot shows a confirmation dialog box titled 'Delete Allowlist Emails'. It contains a warning icon and the text 'Are you sure you want to delete all allowlist emails?'. At the bottom, there are two buttons: 'Yes' (with a checkmark icon) and 'No' (with an 'X' icon). A box labeled '7' points to the 'Yes' button.