

New AIM Certificate Process Job Aid

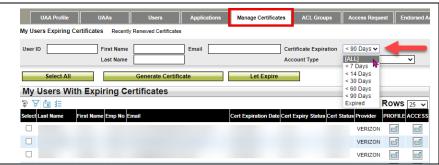
Please contact us at CustomerReadiness@caiso.com if you have any issues or questions.

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Replacing a Verizon Certificate with an Entrust Certificate

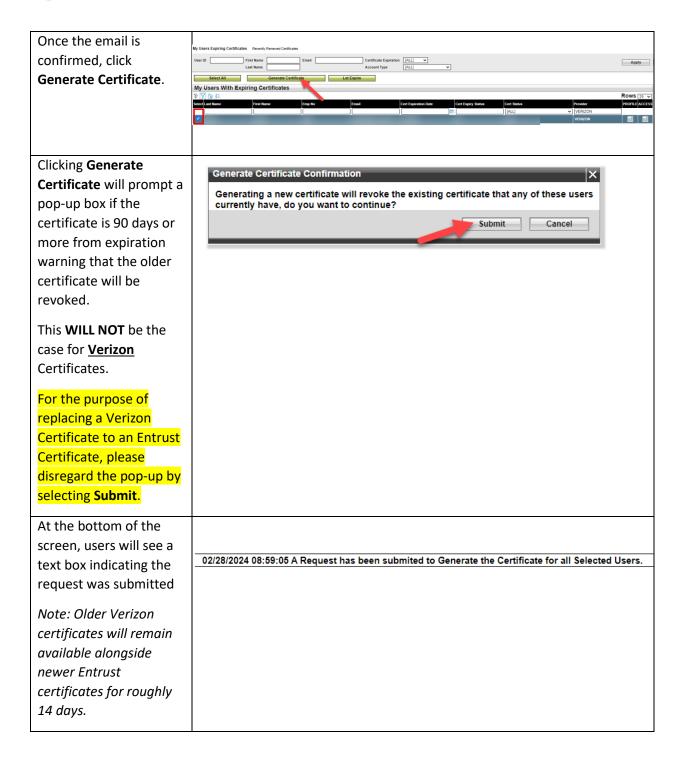
Navigate to the Manage Certificates tab and change the Certificate Expiration to filter for [ALL].





After filtering for [ALL], navigate to the filter icon on the table. In the My Users With Expiring Certificate **Provider** column, type **Verizon** and hit enter to filter. My Users Expiring Certificates Recently Renewed Certificates *Note: If the Provider* First Name column is not showing, please add this column Select All My Users With Expiring Certificates by selecting the Adjust columns button. Cert Expiration Date Cert Expiry Status Cert Status Provider • ✓ PROFILE ACCESS Now that only Verizon Apply certificates are filtered, select one of the certificates. **IMPORTANT TO NOTE:** My Users Expiring Certificates Recently Renewed Certificates Do not hit the Select All First Name feature. If you do, the system will select My Users With Expiring Certificates Entrust certificates as well. Please verify that the email address listed for the user is correct. If the email is **NOT** correct, the UAA will need to edit the email My Users With Expiring Certificates address associated with Rows 25 V the certificate by clicking the user's Profile button and updating.







It will take 5-10 minutes for certificates to My Users Expiring Certificates Recently Renewed Certificates generate. Navigate to the Recently Renewed AA Click here for the formatted language to add into the email for the user when choosing the download the certificate option My Recently Renewed Certificates **Certificates** tab. There. users will see the status of the new certificate that was generated. Details on **Certification** Statuses column can be located on the last page. It will take 3-5 minutes California ISO Profile UAAs Users Applications Manage Certificates ACL Groups Access Request Endorsed Access Request Email Configuration for the certificate download icon to show. Certificate Status [ALL] *UAA Click here for the formatted language to add into the email for the user when choosing the download the certificate option If the certificate My Recently Renewed Certificates download icon is not showing, refer to the California ISO ITPM team
California ISO ITPM team
California ISO ITPM team
UAA Did Not Collect Certificate
UAA Did Not Collect Certificate CREATE_USER
NEW_CERT
NEW_CERT
CREATE_USER **Certification Status** column for the fornia ISO ITPM team
UAA Did Not Collect Certificate
Completed
UAA Did Not Collect Certificate
UAA Did Not Collect Certificate
UAA Did Not Collect Certificate explanation.

The certificate will only be available to download for 5 days. If not downloaded within those 5 days, the UAA will need to generate a new certificate.

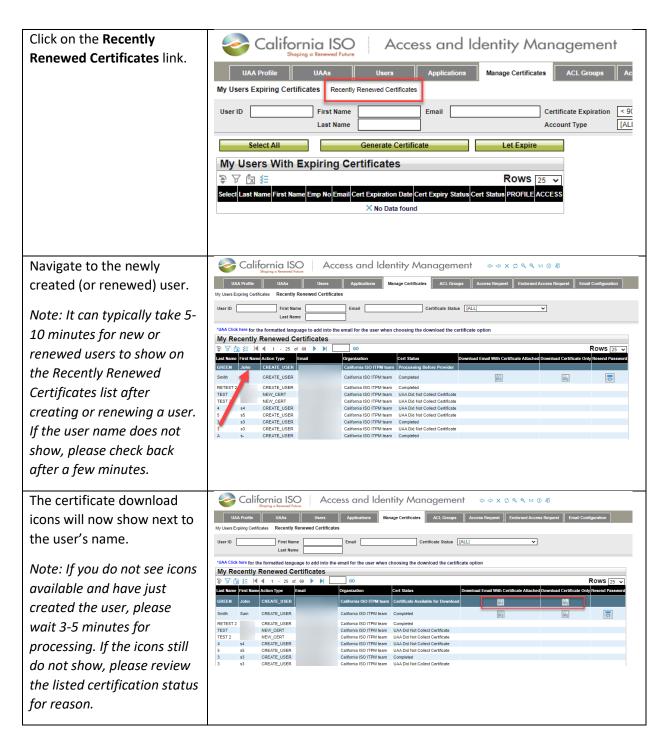
Please proceed to the downloading certificates portions of this Job Aid (page 7 and 8).



Create or Renew an Entrust Certificate

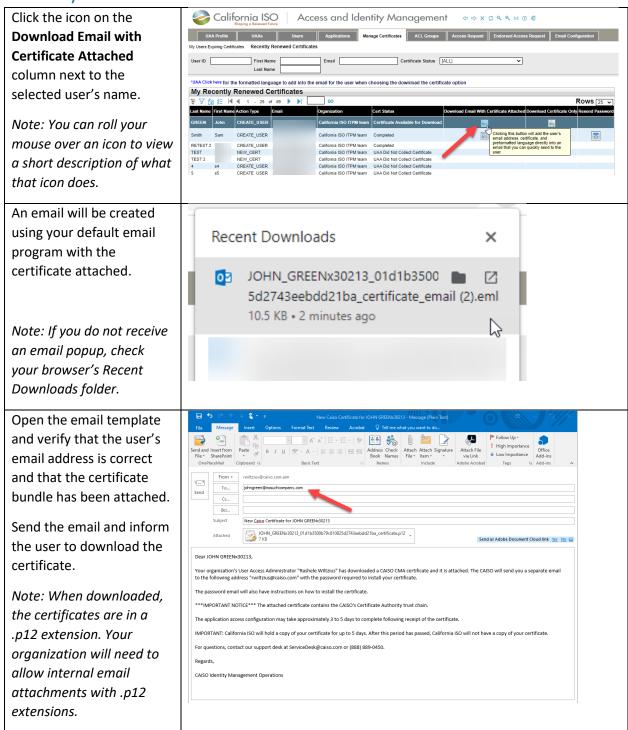
Create new user via the To create a new user: Users tab. California ISO Access and Identity Management <u>OR</u> Applications Manage Certificates ACL Groups A First Name * Renew a current user's Last Name * certificate on the Manage Address 1 Certificates tab. Click the Address 2 box next to the user(s) and State UNITED STATES V click the **Generate** Certificate button. To renew a certificate for a current user: California ISO Access and Identity Management ♦ ♦ × Ø ٩ ٩ UAA Profile UAAs Users Ap ons Manage Certificates ACL Groups Access Req My Users With Expiring Certificates ☐ TEST 9 John x30201 11/21/2024 Once you have created the California ISO Access and Identity Management new user (or renewed the Manage Certificates certificate of a current My Users Expiring Certificates Recently Renewed Certificates user), navigate to the First Name te Expiration < 90 Manage Certificates tab. Last Name My Users With Expiring Certificates Rows 25 V PROFILE ACCESS







Downloading Email Templates with Attached Certificates (preferred method)





Users will receive a separate email directly from AIM with the certificate password.

Note: Make sure your organization whitelists downloads from the website "aim.caiso.com" and "caiso.com"

Dear User "SALLY JANE 2x30171",

We have given bellow the password to be used to install your California ISO CMA Certificate. The certificate will be provided to you by "MUAAX23863" from within your organization.

Password: &amO78qeB_

For instruction on how to install your certificate please visit https://www.caiso.com/informed/Pages/Notifications/Default aspx.
If you have any further questions, please contact our support desk at HelpDesk@caiso.com or (888) 889-0450.

UAAs generating an Entrust certificate to replace a Verizon certificate for a user, please follow-up with the email recipient of the new Entrust certificate to ensure their certificate is installed.

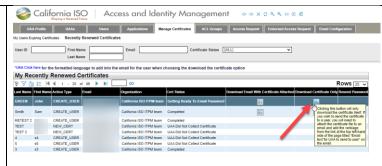
Downloading Only Certificates from AIM

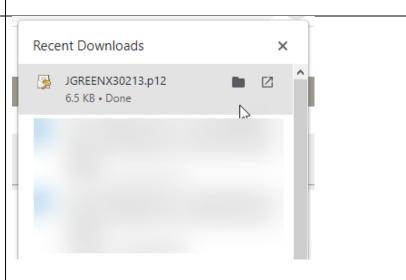
Click the icon on the **Download Certificate Only** column next to the selected user's name.

Note: You can roll your mouse over an icon to view a short description of what that icon does.

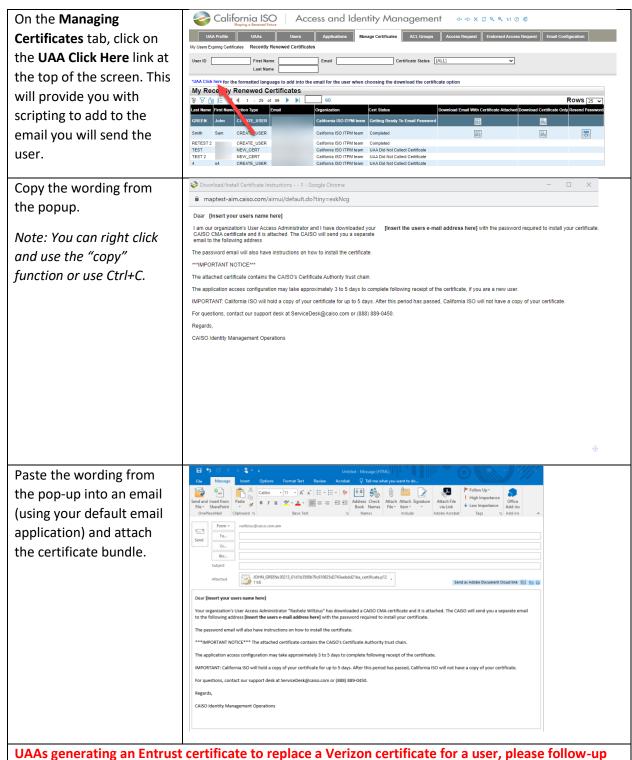
The certificate "bundle" (zip file) will be downloaded to your computer and can be found in your browser's **Recent Downloads** folder.

Note: When downloaded, the certificates are in a .p12 extension. Your organization will need to allow internal email attachments with .p12 extensions.





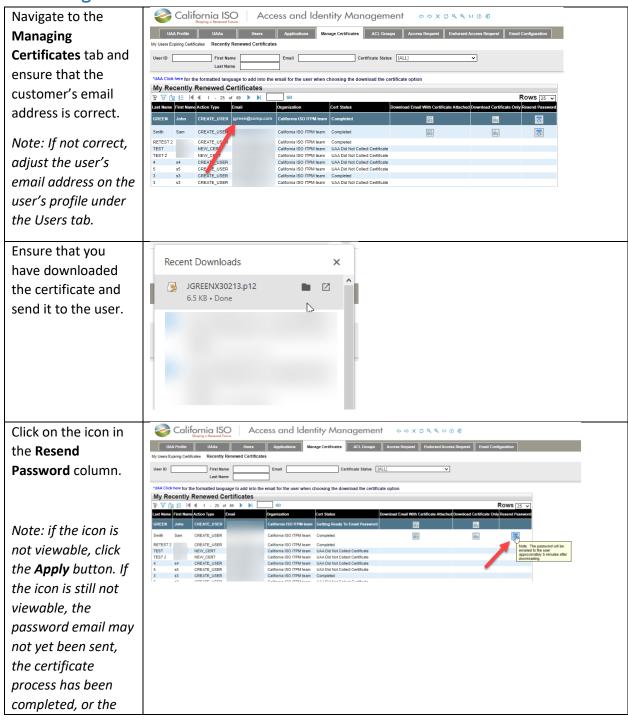




with the email recipient of the new Entrust certificate to ensure their certificate is installed.



Resending Customer Passwords for Certificates





certificate has expired.	
By design, password emails will not be sent until approximately 5 minutes after certificates have been downloaded. If the user still has not received the email, please call the Service Desk for assistance.	Dear User The password below is required to install your California ISO CMA Certificate. The certificate will be provided to you by a User Access Administrator from within your organization. Password: 7d6MD#TmPV * If you cut and paste this password it will likely insert a space at the end and show as invalid when trying to submit, please check and remove the space if it is present. For instructions on how to install your certificate, visit: https://www.caiso.com/informed/Pages/Notifications/Default aspx. If you have any further questions, contact our support desk at ServiceDesk@caiso.com or (888) 889-0450. For more information related to the Applications Access Request process, visit the ISO System Access and California ISO Applications documentation posted on our California ISO website at: http://www.caiso.com/participate/Pages/ApplicationAccess/Default aspx By requesting access to ISO applications or tools, you may occasionally receive emails specific to that tool, such as notifications, outages or reminders. Regards, CAISO Identity Management Operations Certificate/Requests@caiso.com

Certification Statuses in AIM

Cert Status	Definition
Active	AIM has just started processing the certificate.
Getting Ready To Email Password	The certificate has been downloaded and AIM is about to send the password to the user.
Certificate Available for Download	The certificate has been created and is ready to be downloaded by the UAA.
UAA Did Not Collect Certificate	After the certificate was ready to be downloaded, the UAA did not download it. Note: CAISO only keeps the certificate for 5 days. After 5 days we remove the certificate information and you will have to create a new certificate request.
Completed	The certificate process has completed.
Something Went Wrong – Certificate	There was failure while trying to process the certificate. If this status has not change after approximately 2 hours, contact customer support.
Invalid Cert Request	The certificate request was deemed to be invalid. This is a very rare occurrence. Please contact customer support to determine why this occurred.



Password Emailed to User	The password has been emailed to the user.
Processing Before Provider	CAISO is processing the certificate request.
Processing At Provider	The certificate is being processed by the certificate provider.