Access and Identity Management (AIM)
User Guide

Document Owner: Customer Services
## REVISION HISTORY

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<th>REVISED BY</th>
<th>DESCRIPTION</th>
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<tr>
<td>1.0</td>
<td>7/16/13</td>
<td>RMadrigal</td>
<td>Initial document created</td>
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<td>1.1</td>
<td>8/29/13</td>
<td>RMadrigal</td>
<td>Supplemental edits</td>
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<td>9/9/13</td>
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<td>RMadrigal</td>
<td>Updated screenshots</td>
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<tr>
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<td>2.0</td>
<td>12/23/13</td>
<td>RMadrigal</td>
<td>Added release 2 functionality</td>
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<td>2.1</td>
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<td>Added list of auto-provisioned applications. Added notes regarding certificate creation and renewal. Added note regarding requests for endorsed users.</td>
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<td>Updated with new Create ACL Group button</td>
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<td>2.4</td>
<td>1/14/16</td>
<td>LStoloski</td>
<td>Updated with new endorsed user enhancements and email configuration</td>
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<td>Revised endorsed user step by step instructions</td>
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<td>2.7</td>
<td>02/16/17</td>
<td>Mahmadi</td>
<td>Revised ACL Group function and replaced all POC with UAA. Improve flow of information for users.</td>
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<td>2.8</td>
<td>10/18/18</td>
<td>Monica M.</td>
<td>Updated with new AIM Enhancement Functionalities:</td>
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<td></td>
<td></td>
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<td>- Ability to see the endorsement requestor(s)</td>
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<tr>
<td></td>
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<td></td>
<td>- Visibility to other UAA’s and their authorized “entities” and “contracts” within the same organization on the POC Profile page</td>
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<tr>
<td></td>
<td></td>
<td></td>
<td>- Weekly Expiry Email option default to “Yes”</td>
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<td></td>
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<td>- Email auto generation when the UAA provisioning request(s) are rejected by CAISO</td>
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<td>- Auto generated email notification message to both organization UAA’s for each endorsement application request</td>
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<td>Monica M.</td>
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<td></td>
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<td>- Best Practices</td>
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Added the Access Request Status section
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Introduction

The Access and Identity Management (AIM) application was developed to improve the process for requesting, obtaining, updating and maintaining user access to ISO applications.

The ISO maintains approximately 4,000 secured customer accounts granting access to roughly two dozen ISO applications. Each customer has designated one or more individuals within their organization to act as the User Access Administrator (UAA), authorized to initiate and maintain access to ISO applications.

The AIM application provides registered UAA(s) with the ability to view application-level access for all of their organization’s users as well as any users from other organizations who have access to their resources (endorsed users). Additionally, the AIM application will allow the established UAA to view the expiration date of their users’ certificates and automatically request a renewal from within the application.

If your organization has not established a set of designated UAA(s), the following items are required:

1. Have an executed agreement with the ISO.
2. Review the ISO User Access Administrator Establishment and Requirements.
3. Identify the designated UAA(s) and submit a User Access Administrator Agreement form

UAA(s) can perform the following tasks in AIM:

- Create new users
- Update user’s contact info (i.e. email address, etc.)
- Update the Weekly Expiry Email notifications of when users’ certificate are going to expire.
- Renew or revoke’s user’s certificate access
- Add/remove user’s application access
- Submit initial endorse user access
- Provision endorsed user access
- Review access request history
- View a list of Authorize Entity, Authorized Contracts, Associated Applications, Endorsed Users without Access
- Create/Modify/End Date ACL groups

Should you have any questions, please submit an inquiry through the CIDI application / Contact Us page, or contact your designated Client Representatives.
Best Practices

1) Must review the ISO User Access Administrator Establishment and Requirements.
2) Organizations should establish a primary and secondary UAA for all ISO application access purposes.
3) For larger organizations, multiple UAA(s) may be required. It is the responsibility of the organization to determine if any of their designated UAA(s) should have a more limited capacity to provisioning access from other UAA(s).
4) When one external entity request user access to another entity’s data, the requesting entity endorses specified users to the other entity requesting the entity owning the data provision the access to specified date.
5) It is the responsibility of each entity’s UAA to coordinate and validate the user’s identity and access requirements.
6) Sharing certificates is not allowable.
7) UAA(s) must validate:
   • User’s job role for requesting access to ISO systems and
   • User must be authorized for the specified applications and permissions being requested.
8) To ensure that user’s expiration certifications are not missed, select ‘YES’ for the Weekly Expiry Email option under the POC page.
9) Creation of ACL groups can only be created for the following applications: CMRI, MRI-S meter data, WebOMS, and ADS
10) Endorsement of users across ISO applications using the Access Control List (ACL) process must be paid particular attention in order to not provision access to unauthorized or users not permitted to have access (i.e. merchant versus regulatory organization in the AIM tool for the same company.
UAA/POC Profile – Landing Page

The **UAA/POC Profile** Tab displays contact information for an individual UAA.
Create New Users

The **Users** Tab provides the ability to view a list of users. This is also the screen that the UAA will access in order to create a new user.

The user list is separated into two sections: **My Users** (users who belong to the UAA’s organization) and **Endorsed Users** (users from another organization who have been granted access to specific Entities (usually an SCID) or resources in specific applications).

How to Create New User

1. To add a new user, navigate to the **Users** tab and click the **Create New User** Button.
2. Enter the user’s first name, last name, email address, and address information.
3. Select an account type of Externals for an individual person or Externals_System for system accounts.
4. Click **Submit**.

**Note:** The user must be created before an access request can be submitted. A new user will have a status of “New” until a certificate is posted for the user; at which time, the status will change to “Active”. After a new user is created, the UAA will receive an email regarding the certificate that has been created for the new user.
The UAA has the option to forward this email to the user, or register for the certificate directly and then install it on the user’s machine.

Submit Access Request

The UAA will use the Access Request screen to submit new application access requests as well as view the status of submitted requests.

How to Submit an Access Request

1. Navigate to the Access Request tab.
2. Click the pencil icon to add a new request.
3. Click the New Row button.
4. Type a description for the request and click the **Update** button.

5. From the **Select Users** tab, choose the names from the list of **Available Users**. (Note: Use **Ctrl + click** or **Shift + click** to select multiple names).
6. Click on the **Select Applications and Roles** Tab.
7. Click on the desired application and role and click the **Add** button. (Note: Use “Ctrl + click” or “Shift + click” to select multiple applications).
8. (Optional) To remove access, click on the drop-down button in the **Action** column to change the selection from ADD to REMOVE.
9. (Optional – **Copy Current User Access** tab).
   a. To view the access of a specific user in order to grant the same access to a new user, click the **Copy Current User Access** tab.
   b. Click a name in the **Current Users** panel to view that user’s access in the **Current User Access** panel.
   c. Click on the desired application/role/environment and click the **Add** button. (Note: Use “Ctrl + click” or “Shift + click” to select multiple application/role/environment options).

![Image of Access Request panel]

10. After all users, applications, roles, and environments are selected, click the **Update** button in the **Access Request** panel.
11. Review the request to ensure that it is accurate.
Click the **Submit** button in the **Access Request Preview** window to submit the request. (Note: If changes need to be made, close the preview window and edit the request as needed. Click the **Preview** button again, then click the **Submit** button.)

![Access Request Preview](image)

After reviewing the request, click the **Submit** button to complete the request.
Access Request Status

To check on the status of the application request, go to Access Request >> Request History

You can filter by the Request ID or any of the available options.

Provisioning access in AIM can take up to 24-48 hours to complete.

However, when requesting for MRI-S access, it may take a little longer as it requires additional validation.

- When provisioning access for MRI-S, you will notice that under the Access Request History section, the Status will be shown as “PROCESSED”.

- Under the Access Request Details section, the Status will be updated to “ON_HOLD” and the Notes column will indicate that it is “On hold for CAISO approval”.

- Once the review process is complete, the Status will be updated to either “COMPLETED” or “REJECTED”. This additional validation is a prerequisite for the tariff compliance requirement when provisioning for meter data roles.
How to Submit Endorse User Access

UAA Submits Initial Endorse User Access Request to another UAA

**Step 1:** Click on Endorse/UnEndorse My Users sub tab under “Endorsed Access Request” tab.

**Step 2:** Select applicable user/users from “Available Users” box. Then, click on the “Add” button to move applicable user/users to the “Selected Users” box to the right. (Note: User “"Ctrl + click” or “Shift + click” to select multiple names).

**Step 3:** From the drop down box to the right side of “Select an Organization”, please select the organization that you would like the user to have access to.

**Step 4:** Enter a brief description of your request. This description will be viewed by the granting UAA. Note: Please do not include any special characters in the description field. Otherwise, Endorse Selected Users button will not work.

**Step 5:** Click the Endorse Selected Users button. See screen shot below.
Endorsed/UnEndorse My Users – The top section of this display (Endorse My Users) shows a list of my users that are available to be Endorsed by other organizations. The bottom section of this display (UnEndorse My Users) shows a list of my users that are already Endorsed Users to other organizations and are ready to be UnEndorsed. Both of these sections are based on My Users. The top section is My Users to be Endorsed and the bottom section is My Users to be UnEndorsed.

- Remember that the act of endorsing is done at the certificate level – once a certificate is endorsed to another company, the Endorsed UAA and the Endorsor UAA can manage the request to add additional access outside of AIM, although the access itself is provisioned via AIM by the Endorser UAA.
- If a certificate is already endorsed, the UAA will get an error in AIM.
- The Endorser UAA will see in the main UAA Profile tab that they have requests waiting.

**Note:** AIM will send out a generated email notification to both the organization’s UAA when endorsed user application request(s) are rejected by the ISO. *(New)*

Example:

```
Dear User Access Administrator,

You have submitted the following access request on 09/12/2018:

<table>
<thead>
<tr>
<th>Name</th>
<th>User ID</th>
<th>Action</th>
<th>Environment</th>
<th>Application</th>
<th>Role</th>
<th>Entity</th>
</tr>
</thead>
<tbody>
<tr>
<td>OMSTester05</td>
<td>OTESTER05x812</td>
<td>ADD</td>
<td>MAP-TEST</td>
<td>ADS</td>
<td>EXTERNAL READ-ONLY</td>
<td>PCG2</td>
</tr>
</tbody>
</table>

The request has been rejected by Caiso personnel with reason: **Tester05 can not have PCG2 access. Please call CAISO on 10/02/2018**

Please log into AIM via the ISO portal [https://portal.caiso.com/aim](https://portal.caiso.com/aim) to check the status of this request.

If you have any issues, please contact our support desk at HelpDesk@caiso.com or (888) 889-0450.

Regards,

CAISO Identity Management Operations
```
Endorsed User Request Email Notification

The UAA shall receive a generated email notification when users are endorsed to their organization for application access. The email will contain the name of the company that is submitting the endorsed user request.

Example:

Dear Point of Contact,

Please note that the following users are being endorsed to your organization from ABC Energy, LLC.

ADS Tester 14 (xatester14122375)

Regards,
CAISO Identity Management Operations
UAA to Grant Endorse User Access Request

When a UAA logs into AIM, they will see the landing page. On this page the UAA will see a list in the Endorsed Users without Access box. These are users from other organizations that are waiting for approval. This is the initial notice to the UAA to go to the “Endorsed Access Request” tab for approval/disapproval of their access request. The screenshot below captures the landing page with the “Endorsed Users without Access” notification box.

![Landing page screenshot](image-url)
Step 1: The granting UAA will go to the “Add/Remove Endorsed User Access” sub-tab under the “Endorsed Access Request” tab. See screen shot above.

Step 2: The granting UAA will click on the Pencil icon to add a new request.
- Click on the New Row button.
- Type a description for the request and click the Update button.
- From the Select Endorsed Users tab, choose the names from the list of Available Users Endorsed to Me. (Note: User “Ctrl + click” or “Shift + click” to select multiple names).
- Click on the Select Applications and Roles tab.
- Click on the desired application and role and click the Add button. (Note: Use “Ctrl + click” or “Shift + click” to select multiple applications).
- (Optional) To remove access, click on the drop-down button in the Action column to change the selection from ADD to REMOVE.
- (Optional – Copy Current User Access tab).
  - To view the access of a specific user in order to grant the same access to a new user, click the Copy Current User Access tab.
  - Click a name in the Current Users panel to view that user’s access in the Current User Access panel.
  - Click on the desired application/role/environment and click the Add button. (Note: Use “Ctrl + click” or “Shift + click” to select multiple application/role/environment options).
- After all users, applications, roles, and environments are selected, click the Update button in the Access Request panel.
- Review the request to ensure that it is accurate.
- Click the Submit button in the Access Request Preview window to submit the request. (Note: If changes need to be made, close the preview window and edit the request as needed. Click the Preview button again, then click the Submit button.) Please see screen shot below.
Confirm Endorsement For Selected Users

Before the UAA(s) can complete the submission request for endorsing ISO application access to user(s) outside of their organization, the UAA must check the “The information contained herein is Confidential and subject to the FERC Standards of Conduct’ acknowledgement box in the AIM application.
UnEndorse Users Endorsed to Me

Step 1: Click on the Endorsed Access Request tab.

Step 2: Click on the “UnEndorse Users Endorsed to Me” sub-tab.

Step 3: From the list of users in the “User Endorsed to Me” box, select the applicable user.

Step 4: Click the “Add” icon. This will move the selected user from left box to the right box “Selected Users UnEndorse”.

Step 5: Click on the “Un Endorse Selected Users” icon on the bottom of the left box. This will UnEndorse the selected user.

UnEndorse Users Endorsed to Me – This tab provide a list of Users Endorsed to Me (not my users) ready to be UnEndorsed. Unlike the previous screen, these users are not my users. These are users from other organizations which have access to my data. The primary objective of this screen is to remove data access from Endorsed users to my organization.

View Endorsed Access Request History

Step 1: Click on Endorsed Access Request tab.
Step 2: Click on Endorsed Access Request History sub-tab.

Step 3: The “Access Request History” shows you a list of your recent access requests.

Step 4: When you select a record from “Access Request History”, all of the details of your request will be displayed on the “Access Request Details”.

Step 5: If you already know the request ID, you can simply place that ID in the “Request ID” field above “Access Request History” and then click the Apply button.

**Endorsed Access Request History**: This tab provides you with list of your recent Endorsed access requests. The top box shows you the history of your requests and the bottom box provides you with the details of the selected access request.
View List of Endorsed Users

There is a new sub tab under “User” called “Users Endorsed to Me”. This new tab provides a list of all Endorsed Users to your organization.

- My Users = List of users belonging to my organization.
- Users Endorsed to Me (New tab) = List of Endorsed Users to my organization (Not my employees but have access to my data).
Step 1: Click on the “Users” tab.

Step 2: Click on “Users Endorsed to Me”.

Step 3: Please allow time for users from other organizations to show up under “Users Endorsed to Me”. This is just a view display.

QUICK REFERENCE GUIDE TO ENDORSED ACCESS REQUEST SUB TABS

- **Endorse/UnEndorse My Users**: This sub tab is for **REQUESTING UAA only**. The users reflected under this sub tab belong to your organization.

- **UnEndorse Users Endorsed to Me**: This sub tab is for **GRANTING UAA only**. The users reflected under this sub tab do NOT belong to your organization.

- **Add/Remove Endorsed User Access**: This sub tab is for **GRANTING UAA only**. The users reflected under this sub tab do NOT belong to your organization.

- **Endorsed Access Request History**: This sub tab is for **GRANTING UAA only**. The users reflected under this sub tab do NOT belong to your organization.
Create ACL Groups

An Access Control List (ACL) defines the access rights each user has to particular assets. The **ACL Groups** screen provides the UAA with the ability to create new ACL groups to isolate and grant access to a single asset (or group of assets).

**How to Create a New ACL Group**

1. Click the **ACL Groups** tab
2. Click the **Create ACL Group** button to create an ACL group
3. Select the **Environment**, and enter a **Description** for the ACL group.
4. Select a **Start Date** and an **End Date** for the ACL group and click the **Submit** button. Please note that the “Start Date” can be set to a past date.
<table>
<thead>
<tr>
<th>POC Profile</th>
<th>Users</th>
<th>Applications</th>
<th>Certificate Renewal</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create New ACL Group</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Entity Name</strong></td>
<td>16TEST12345</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Environment</strong></td>
<td>MAP-STAGE</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Description</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Start Date</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>End Date</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**NEW** the Start Date can be set to a past date

Click Submit when you are done

Submit

Cancel
Note:
- Once an ACL Group is created, the effective date can be end-dated but not extended. The ACL users will still be able to view the data beginning from the ‘Start Date’ to the designated ‘End Date’.
- ACL Group Start and End dates are unchangeable once created.
- The ACL Group cannot be deleted from AIM once it’s created but can be made non-provisionable by the UAA. This means that the UAA will not be able to provision new users to the non-provisionable ACL Group in AIM; however, the existing users will still have access to the data.
- The UAA can add new resources to the ACL Group but cannot remove existing Resource IDs from the list.
- Once the ACL end date expires, the existing users can no longer see data for the trade dates after the end date but those users will continue to have access to the data prior to the end date.
- ISO does not send out a notification reminder to the UAA when the ACL Group end dates. It is the responsibility of the UAA to re-create a new ACL group and provision ACL users.
- The naming format for the ACL Groups will be ‘EXC_[SCID]_[Autonum]’.
How to Modify an ACL Group

1. Select the ACL Group name then click on the “Pencil” icon.

2. Now you can change “Description” and “Status” fields of the ACL Group. You can select “Provisionable or Non-Provisionable” from drop down box in “Status Fied”. Provisionable means you that you can provision this ACL Group to users. Non-Provisionable mean you cannot provision users to this ACL Group.
How to Add Assets to an ACL Group

1. Click the **Edit** button to add assets to the ACL group.

First select the ACL Group then click on "Edit" to add resources.
2. Select an asset from the **Available Assets** list and click the **Add** button to add an asset to the ACL group.

3. Once you have selected applicable resources, click on “Submit” button to **PERMANENTLY** add resources to ACL Group – Or click on “Cancel” to not add selected resources to ACL Group.

4. You cannot remove a resource from ACL Group once it has been assigned. The UAA will need to create a new ACL Group for the desired resource.
How to view an ACL Group

Click on an entry in the **ACL Groups** section to view the list of asset(s) associated with that group.

![ACL Groups Section](image-url)

Click an ACL Group to view the list of Assets here
How to Renew a Certificate

1. To renew a certificate, navigate to the Certificate Renewal tab.
2. The Certificate Renewal tab will display the My Users With Expiring Certificates list. This list will show all users whose certificates are expiring within 90 days or less. (Note: If the certificate expiration date is further into the future, the user will not appear on this list.)
3. Click the Renew button on an individual line item. Another option is to use the “Shift + click” or “Ctrl + click” functionality to select multiple users simultaneously. After selecting multiple users, click the Renew Selections button to apply it to all items selected.

How to Let a Certificate Expire

1. To let a certificate expire, navigate to the Certificate Renewal tab.
2. The Certificate Renewal tab will display the My Users With Expiring Certificates list. This list will show all users whose certificates are expiring within 90 days or less. (Note: If the certificate expiration date is further into the future, the user will not appear on this list.)
3. Click the Let Expire button on an individual line item. Another option is to use the “Shift + click” or “Ctrl + click” functionality to select multiple users simultaneously. After selecting multiple users, click the Let Selections Expire button to apply it to all items selected.

How to Revoke a Certificate

1. To revoke a user’s certificate, navigate to the User tab.
2. Find the correct user and click on the button in the Profile column.
3. From the User Profile screen, click the Revoke User button.
4. A confirmation message will appear that states: “Are you sure you want to revoke the user certificate and remove all application access for this user? This action cannot be undone.”
5. Click OK to revoke the user’s certificate.
6. Once the OK button is clicked, the certificate will be revoked and all application access will be removed. This change will be reflected in AIM after the next data sync period (usually within 12 – 24 hours). Note: If a user’s certificate is revoked by mistake, the UAA must create a new user and re-
provision all access for that user as there is no undo functionality for this action in AIM.

Request History

Check Status of an Access Request

1. To check the status of an access request, navigate to the Access Request tab and click on the Request History link.
2. Click on an individual line item in the Access Request panel.
3. The list of items requested will display in the Access Request Details panel.
4. Review the Status column for each line item to verify that the requested access was granted.
   a. Submitted: The access request has been submitted and is waiting for the approval process to run.
   b. Approved: The access request has been approved and is waiting to be processed.
   c. Processing: The access request is being processed.
   d. Completed: The access request has been completed and the user can now access the application.
   e. Rejected: The access request has been rejected and will not be processed. See the notes column for the reason it was rejected.
Click on an individual access request in the Access Request panel to show the Access Request Details at the bottom of the screen.
Note: An Access Request will begin with a status of “Submitted”. It will then move to “Processing”. Finally, it will have a status of “Processed”. This does not mean that all access was granted. The UAA must review each of the line items in the Access Request Details to verify that access was granted to a specific user.

In the Access Request Details section, the status options are: Submitted, Approved, Processing, Completed, or Rejected.

Email Configuration
Email Configuration tab is a new enhancement which provides UAA the ability to add additional e-mail recipients on 7 different AIM automated notifications. Below is list of these automated notifications:

- Application Access Request
- Certificate Renewal from UI
- Renew User Certificate from UI
- Revoke User Certificate from UI
- Submit a New User from UI
- Notification for certificates expiring within 30 days, 60 days, 90 days and new users
- User Revocation Email

Steps to add additional e-mails:

1. Please click on “Email Configuration” tab per screen shot below
1. Select applicable Certificate Events. Example in screen shot below is “Application Access Request”

2. Click on pencil icon under “Email List semicolon separated” box in the screen shot below

3. Click on “New Row” under “Email List semicolon separated” box in the screen shot below

4. Free text field will be activated. Please list applicable e-mail recipients separated by semicolon in this field

5. When your list is finalized, please click on “Update” under “Email List semicolon separated” box
6. If you need to delete an e-mail address, select that e-mail address and click on “Update” icon. Select the entire e-mail address and click the Delete button on your keyboard. It will look like screen shot below. Then, simply click on “Update” icon. This will remove that e-mail address.
Features of User Interface

Application Toolbar

The application toolbar contains the application or browser-based functions.

<table>
<thead>
<tr>
<th>Function</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>←</td>
<td>Goes to the previous display in browsing history</td>
</tr>
<tr>
<td>→</td>
<td>Goes to the next display in browsing history</td>
</tr>
<tr>
<td>✕</td>
<td>Stops loading the current display</td>
</tr>
<tr>
<td>🔁</td>
<td>Refreshes the display in the current window</td>
</tr>
<tr>
<td>✱</td>
<td>Zoom out</td>
</tr>
<tr>
<td>✱</td>
<td>Zoom in</td>
</tr>
<tr>
<td>✱</td>
<td>Log out</td>
</tr>
</tbody>
</table>

Filter Toolbar – User Access Tab

The filter toolbar contains the account filtering options.

<table>
<thead>
<tr>
<th>Function</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Refresh</td>
<td>Refreshes user data with the filters</td>
</tr>
<tr>
<td>Restore</td>
<td>Restores filters to default settings</td>
</tr>
<tr>
<td>* wildcard search</td>
<td>Use the asterisk (<em>) wildcard symbol to search for user information. (e.g. Enter Chris</em> in the First Name field and click the Apply button to display a list of users whose first names begin with “Chris”. The search results will display users who are named Chris, Christopher, Christine, etc.) To ensure that you see all records meeting your search criteria add the “*” at the end to display multiple records.</td>
</tr>
</tbody>
</table>
Results Window

- Restore sort to default setting (removes user-created multiple column sorting, which is described in detail on the following page)
- The Inline Filter works as a toggle. Click the icon to filter data based on the content of a particular column. Press Enter after entering the filter criteria. (Note: Wildcard symbols can be used in this column, but they are not necessary. For example, searching for *UAA* or UAA will provide the same results.)
- Exporting (to Excel, Word, CSV)
- Printing. (Note: The Print Menu is accessible from the Current User Access, Current Endorsed User Access, and Entity Assets pages.)

Results Window – Multiple Pages

- Navigate to the first page of data
- Navigate to the previous page of data
- Navigate to the next page of data
- Navigate to the last page of data
- Go to specific line item entered in search box

Multiple Column Sorting

Clicking on a column in the results window enables the user to sort the data in ascending or descending order.

Here is an example of how to use multiple sorting:

- Click a column header. The data is sorted in ascending order and the following icon appears in the column header: . This indicates the first level sorting.
- Click another column. The data is sorted in ascending order. The icon in the first column changes to: 
  The following icon appears in the second column: . This indicates the second level sorting.

- Click another column. The data is sorted in ascending order and the following icon appears in the column header: .

- Click the same column again. The data is sorted in descending order. The icon in the column header is changed to: .

- Continue to click column headers to deselect and then reprioritize the sorting order.

The following image shows the example explained above:
Export Menu

| Export All | All data points will be exported to Excel |
| Export Page | The current page will be exported to Excel |
| Export Wizard | The user can customize the data export |

Export Wizard

The Export Wizard enables the user to export data in the following three file types:
- Export Excel
- Export CSV
- Export Word

The Export Wizard can be customized using the following options:
- Enable Grid Export: If a display contains multiple grids, the user can select specific grids to export. (Note that the CSV format can only export one grid).
- Display Name: The user can modify the name of a column that will appear in the data export.
- Enable/Disable Column Visibility: The user can select which columns to include in the exported file.
- Custom Column Width: The user can choose to modify the width of a specific column
- Rows to Export: All Rows, or the Original Page
Once the user has selected the export parameters, click the **Export** button to generate a file.

**Note:** The maximum number of rows that can be exported is 10,000. If the number of rows available exceeds 10,000, only the first 10,000 rows will be exported. It is recommended to use filters to limit the number of results that are displayed in order to export all rows.

### Print Menu

The Print Menu is accessible from the **Current User Access**, **Current Endorsed User Access**, and **Entity Assets** pages.

<table>
<thead>
<tr>
<th>Print All</th>
<th>All data will be printed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Print Page</td>
<td>Only the data shown on the current page will be printed</td>
</tr>
<tr>
<td>Print Wizard</td>
<td>The user can customize the data that is printed</td>
</tr>
</tbody>
</table>

### Print Wizard

The **Print Wizard** provides the option to print in the following four combinations of page size and orientation:

- A4 / Letter Portrait
- A4 / Letter Landscape
- 11”x17” Portrait
- 11”x17” Landscape

**Note:** The option for portrait or landscape must also be set in the standard printer selection window.
The Print Wizard can be customized using the following options:

- **Enable Grid Print:** If a display contains multiple grids, the user can select specific grids to export.
- **Display Name:** The user can modify the name of a column that will appear on the printed document.
- **Column Visibility:** The user can select which columns to include on the printed document.
- **Enable Wrapping:** The user can choose to enable or disable text wrapping for a column.
- **Custom Column Width:** The user can choose to modify the width of a specific column.
- **Rows to Print:** The user can choose to print All Rows, or just the Original Page.

After the user has selected the print parameters, click the **Print** button. AIM will generate a print preview, as shown below.

**Note:** The column names do not appear in the print preview window. However, the column names will appear on the hard copy of the document.

After reviewing the print preview, click the **Print** button and the standard print window will display.

Choose a printer from the list and modify the printing preferences as appropriate (e.g. portrait or landscape) and print the document.