




California ISO

How to Grant Access to Resource Interconnection Management System (RIMS 5)

Addendum to Access and Identity Management (AIM) User Guide

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	California ISO	Technology	ISO Version:	1.0
How to Grant Access to Resource Interconnection Management System (RIMS 5)		Effective Date:		02/16/17

REVISION HISTORY

VERSION NO. <small>(Must match header)</small>	DATE	REVISED BY	DESCRIPTION
1.0	02/22/2017	Massih Ahmadi	Initial document created


 California ISO	Technology	ISO Version:	1.0
How to Grant Access to Resource Interconnection Management System (RIMS 5)		Effective Date:	02/16/17


TABLE OF CONTENTS

Introduction 4

 Access Request..... 5

 New Request 5

 Request History 11

 California ISO	Technology	ISO Version:	1.0
How to Grant Access to Resource Interconnection Management System (RIMS 5)		Effective Date:	02/16/17

Introduction

The purpose of this documentation is to provide User Access Administrators (UAA) for Resource Interconnection Customers step-by-step instructions to provision their users to Resource Interconnection Management Systems (RIMS 5) via the Access and Identity Management (AIM) application.

We highly recommend to use Microsoft's [Internet Explorer Version 11 \(IE 11\)](#) for utilizing all ISO applications, including AIM, as unexpected compatibility issues may arise when using other browsers.


This is not the official user guide for Access and Identity Management (AIM) application or Resource Interconnection Management Systems (RIMS) application. If you would like to see the official user guide for these applications, please use URL links below:

URL to AIM User Guide:

http://www.caiso.com/Documents/AccessandIdentityManagement_AIM_UserGuide.pdf

URL to RIMS 5 User Guide – Application and Study:

<http://www.caiso.com/Documents/RIMS5UserGuide-ApplicationAndStudy.pdf>

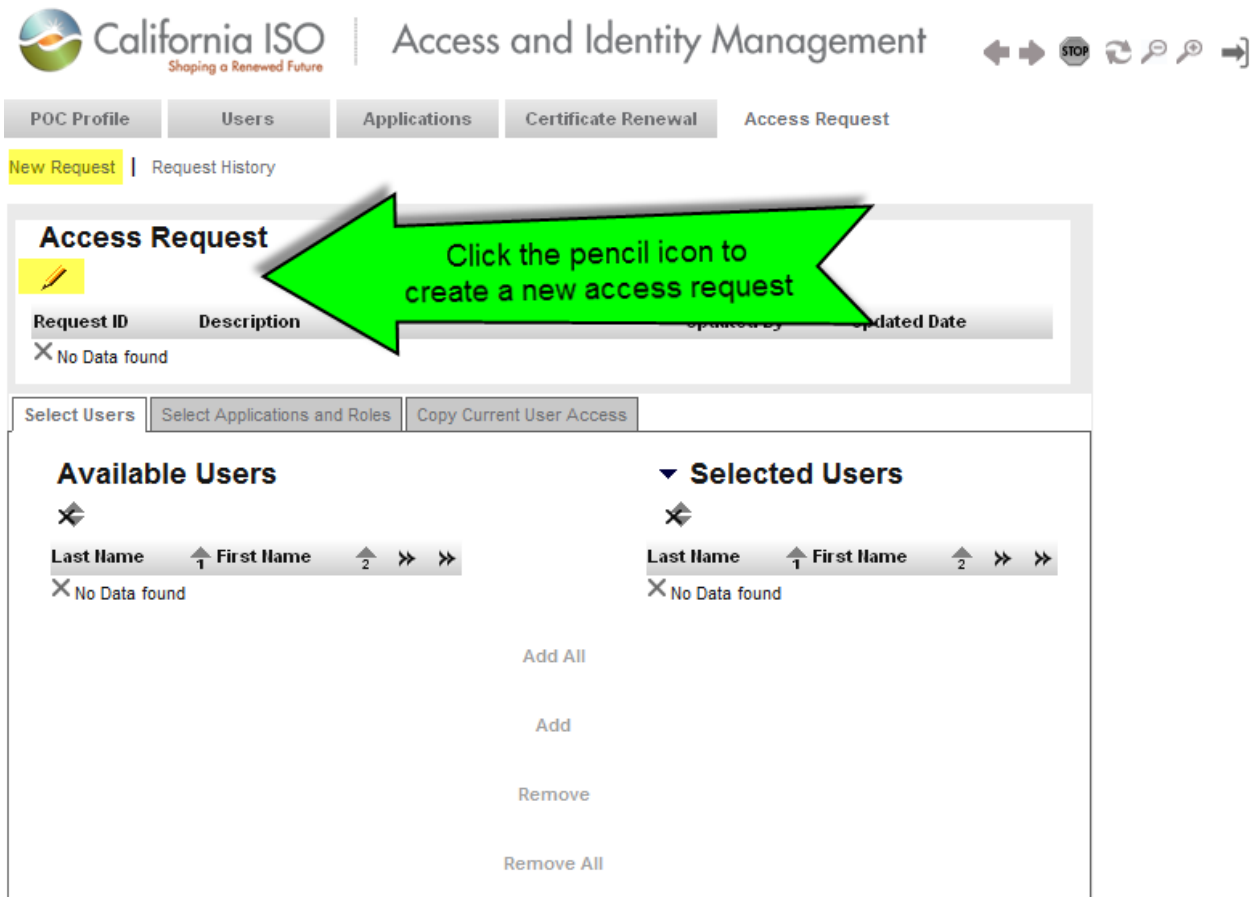
 California ISO	Technology	ISO Version:	1.0
How to Grant Access to Resource Interconnection Management System (RIMS 5)		Effective Date:	02/16/17

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.

New Request

Click the pencil icon and then the **New Row** button to create an access request.



California ISO | Access and Identity Management

POC Profile | Users | Applications | Certificate Renewal | Access Request

New Request | Request History

Access Request

Request ID | Description | Updated Date

X No Data found

Select Users | Select Applications and Roles | Copy Current User Access

Available Users

Last Name | First Name

X No Data found

Selected Users

Last Name | First Name


X No Data found

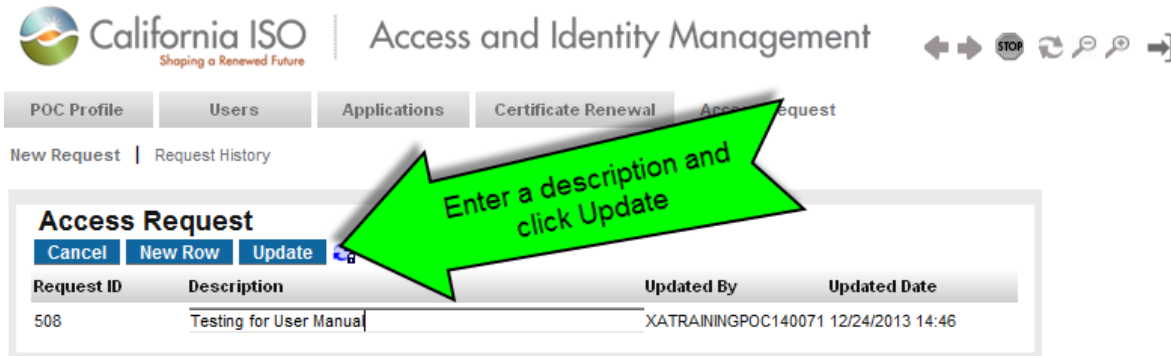
Add All

Add

Remove

Remove All

 California ISO	Technology	ISO Version:	1.0
How to Grant Access to Resource Interconnection Management System (RIMS 5)		Effective Date:	02/16/17



California ISO | Access and Identity Management

POC Profile | Users | Applications | Certificate Renewal | Access Request

New Request | Request History


Access Request

Cancel | New Row | Update

Request ID	Description	Updated By	Updated Date
508	Testing for User Manua	XATRainingPOC140071	12/24/2013 14:46

Enter a **Description** for the access request and click the **Update** button.

Once you have clicked on “**Update**” button, the “Available Users” screen will get populated with list of your current users per screen shot below.

 California ISO	Technology	ISO Version:	1.0
How to Grant Access to Resource Interconnection Management System (RIMS 5)		Effective Date:	02/16/17

Access Request

Request ID	Description	Updated By	Updated Date
508	Testing for User Manual	XATRainingPOC140071	12/24/2013 14:46

Preview
Cancel

Select Users
Select Applications and Roles
Copy Current User Access

Available Users

Last Name	First Name
Training POC	AIM
Training User1	AIM
Training User10	AIM
Training User2	AIM
Training User3	AIM
Training User5	AIM
Training User6	AIM
Training User7	AIM
Training User8	AIM
Training User9	AIM


Selected Users

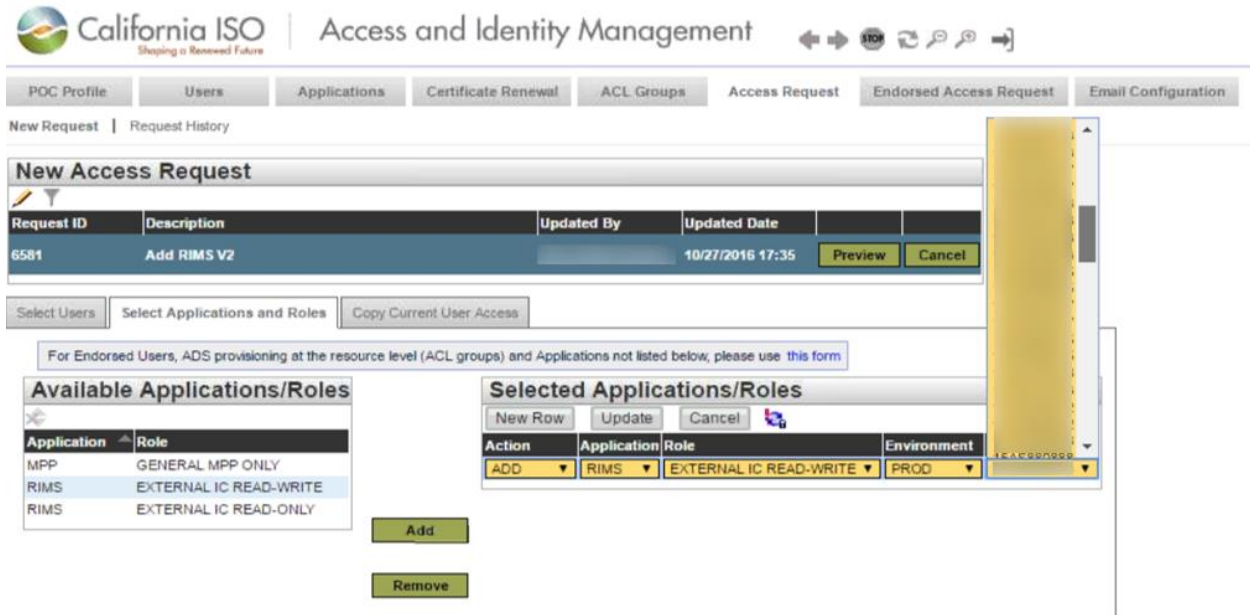
No Data found

Add All
Add
Remove
Remove All

NOTE: If the buttons do not show, navigate to another screen in AIM and return to your request. This issue is related to browser compatibility.

Select the applicable user from “Available Users” from the left and then click on “Add”. This will move the user to the right side under “Selected Users”.

 California ISO	Technology	ISO Version:	1.0
How to Grant Access to Resource Interconnection Management System (RIMS 5)		Effective Date:	02/16/17



New Access Request

Request ID	Description	Updated By	Updated Date		
6581	Add RIMS V2		10/27/2016 17:35	Preview	Cancel

Select Users | Select Applications and Roles | Copy Current User Access

For Endorsed Users, ADS provisioning at the resource level (ACL groups) and Applications not listed below, please use [this form](#).

Application	Role
MPP	GENERAL MPP ONLY
RIMS	EXTERNAL IC READ-WRITE
RIMS	EXTERNAL IC READ-ONLY

Add | Remove

Action	Application	Role	Environment
ADD	RIMS	EXTERNAL IC READ-WRITE	PROD

1. From the “Application and Roles” sub tab, select RIMS – External IC READ-WRITE, click “Add”
2. Select Entity ID (a.k.a. Project Code)
3. Click “Update”

More Project IDs to add?


NO

Click “Preview” (see page 30 of AIM User Guide)

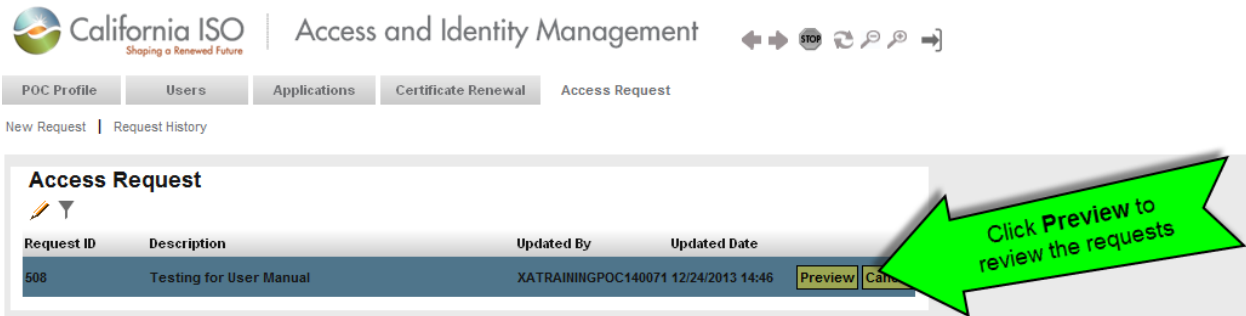
YES

4. Click Pencil icon
5. Click “New Row” and repeat from Step:1 above

NOTE: You may see duplicated Project ID’s in the “Entity ID” drop down box. This is due to a software variance set to be fixed in a future patch. Please select either record of the duplicates. The system will provision to that Project ID.

 California ISO	Technology	ISO Version:	1.0
How to Grant Access to Resource Interconnection Management System (RIMS 5)		Effective Date:	02/16/17

Click the **Preview** button to review the access request.



California ISO | Access and Identity Management

POC Profile | Users | Applications | Certificate Renewal | Access Request


New Request | Request History

Access Request

Request ID	Description	Updated By	Updated Date	Preview	Cancel
508	Testing for User Manual	XATRainingPOC140071	12/24/2013 14:46	Preview	Cancel

Click Preview to review the requests

NOTE: If nothing happens, check to see if you have enabled pop-up blockers on your browser.

 California ISO	Technology	ISO Version:	1.0
How to Grant Access to Resource Interconnection Management System (RIMS 5)		Effective Date:	02/16/17

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


Request: Testing for User Manual

Access Request Preview

✕ ▼ 📄

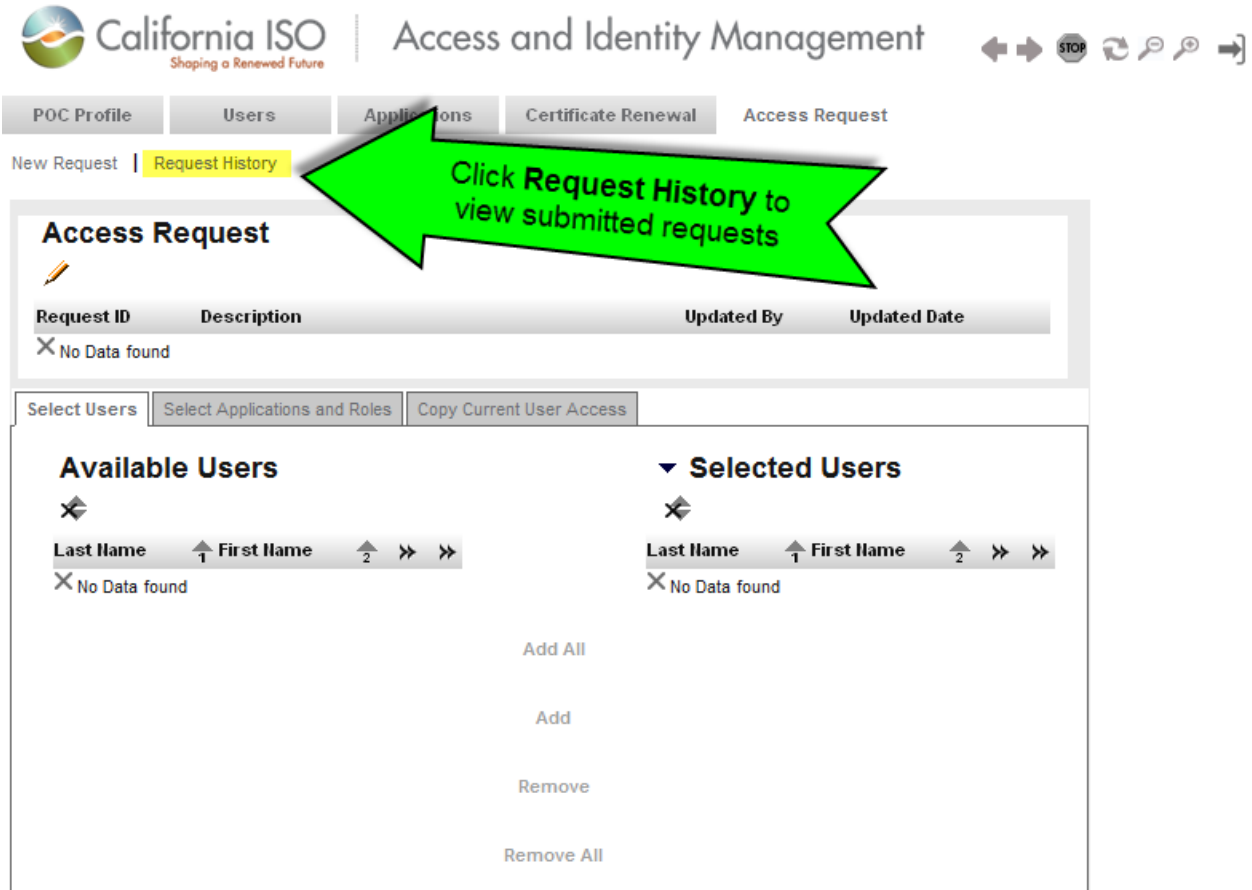
Last Name	↑ First Name	↑ 2 Action	↑ 3 Environment	↑ 4 Application	↑ 5 Role	↑ 6 Entity
Training User10	AIM	ADD	MAP-STAGE	CMRI	EXTERNAL READ ONLY TRAINING	
Training User10	AIM	ADD	MAP-TEST	CMRI	EXTERNAL READ ONLY TRAINING	
Training User10	AIM	ADD	STAGE	CRTMGT	EXTERNAL READ-ONLY TRAINING	
Training User6	AIM	ADD	MAP-STAGE	CMRI	EXTERNAL READ ONLY TRAINING	
Training User6	AIM	ADD	MAP-TEST	CMRI	EXTERNAL READ ONLY TRAINING	
Training User6	AIM	ADD	STAGE	CRTMGT	EXTERNAL READ-ONLY TRAINING	
Training User7	AIM	ADD	MAP-STAGE	CMRI	EXTERNAL READ ONLY TRAINING	
Training User7	AIM	ADD	MAP-TEST	CMRI	EXTERNAL READ ONLY TRAINING	
Training User7	AIM	ADD	STAGE	CRTMGT	EXTERNAL READ-ONLY TRAINING	

Click Submit to complete the request

 California ISO	Technology	ISO Version:	1.0
How to Grant Access to Resource Interconnection Management System (RIMS 5)		Effective Date:	02/16/17

Request History

Click the **Request History** link to view a list of submitted requests.



California ISO | Access and Identity Management

POC Profile | Users | Applications | Certificate Renewal | Access Request

New Request | **Request History**

Access Request

Request ID	Description	Updated By	Updated Date
No Data found			

Select Users | Select Applications and Roles | Copy Current User Access


Available Users

Last Name	First Name
No Data found	

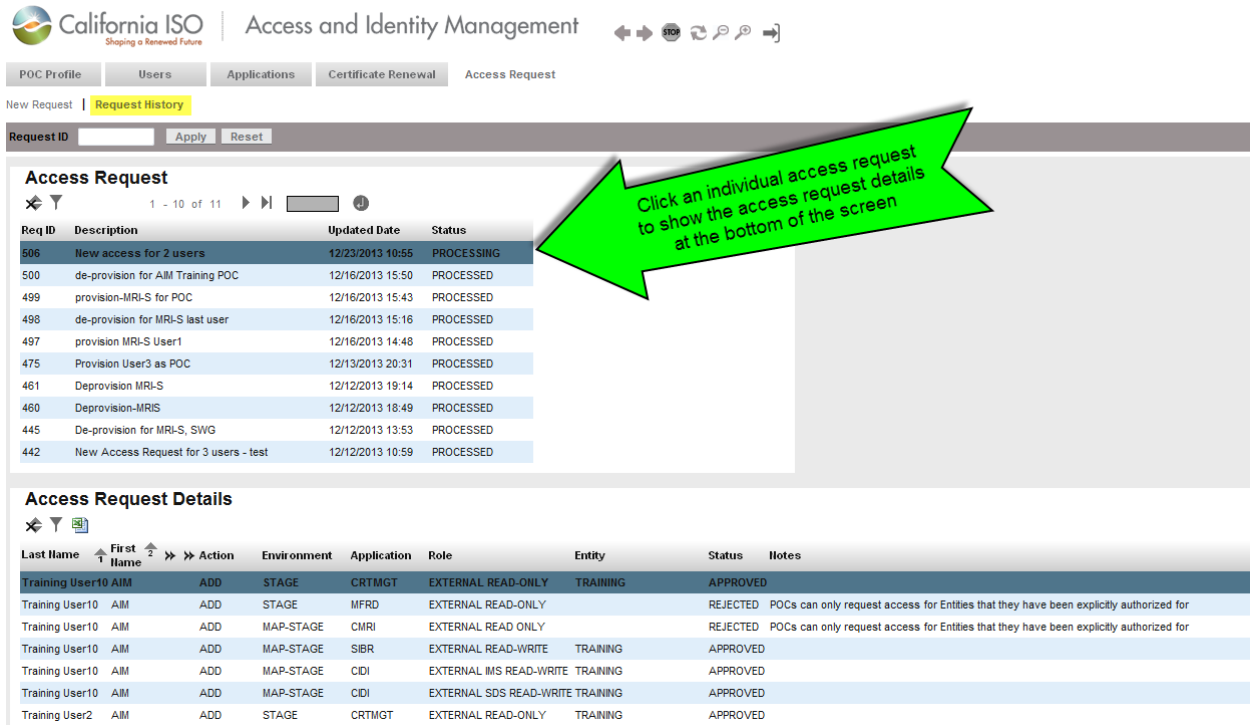
Selected Users

Last Name	First Name
No Data found	

Add All
Add
Remove
Remove All

 California ISO	Technology	ISO Version:	1.0
How to Grant Access to Resource Interconnection Management System (RIMS 5)		Effective Date:	02/16/17

Click on an individual access request in the **Access Request** panel to show the **Access Request Details** at the bottom of the screen.



Access Request

Req ID	Description	Updated Date	Status
506	New access for 2 users	12/23/2013 10:55	PROCESSING
500	de-provision for AIM Training POC	12/16/2013 15:50	PROCESSED
499	provision-MRI-S for POC	12/16/2013 15:43	PROCESSED
498	de-provision for MRI-S last user	12/16/2013 15:16	PROCESSED
497	provision MRI-S User1	12/16/2013 14:48	PROCESSED
475	Provision User3 as POC	12/13/2013 20:31	PROCESSED
461	Deprovision MRI-S	12/12/2013 19:14	PROCESSED
460	Deprovision-MRIS	12/12/2013 18:49	PROCESSED
445	De-provision for MRI-S, SWG	12/12/2013 13:53	PROCESSED
442	New Access Request for 3 users - test	12/12/2013 10:59	PROCESSED

Access Request Details

Last Name	First Name	Action	Environment	Application	Role	Entity	Status	Notes
Training User10	AIM	ADD	STAGE	CRTMGT	EXTERNAL READ-ONLY	TRAINING	APPROVED	
Training User10	AIM	ADD	STAGE	MFRD	EXTERNAL READ-ONLY		REJECTED	POCs can only request access for Entities that they have been explicitly authorized for
Training User10	AIM	ADD	MAP-STAGE	CMRI	EXTERNAL READ ONLY		REJECTED	POCs can only request access for Entities that they have been explicitly authorized for
Training User10	AIM	ADD	MAP-STAGE	SIBR	EXTERNAL READ-WRITE	TRAINING	APPROVED	
Training User10	AIM	ADD	MAP-STAGE	CIDI	EXTERNAL IMS READ-WRITE	TRAINING	APPROVED	
Training User10	AIM	ADD	MAP-STAGE	CIDI	EXTERNAL SDS READ-WRITE	TRAINING	APPROVED	
Training User2	AIM	ADD	STAGE	CRTMGT	EXTERNAL READ-ONLY	TRAINING	APPROVED	

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.