AIM New Certificate Process for UAAs

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Housekeeping

Make sure to keep yourself muted unless you have a question.

If you have a question, you may either ask over the phone or in the chat.

If you want to ask a question, you can virtually “raise your hand” in WebEx.
Agenda

In this training, we will:

• Learn the differences between the old/current certificate creation and renewal process and the new certificate creation and renewal process
• Look at and discuss an overview of the changes in AIM
• Walk through the new certificate creation and renewal process (demo)
• Discuss next steps
Current Certificate Process

**UAA**
- Add User

**CAISO**
- Send certificate request to user

**End User**
- Key in information and passcode

**CAISO**
- Verify data and approve (3-10 days)

**End User**
- Retrieve cert with passcode and install root + cert (in correct order)
New Certificate Process

UAA downloads certificate from AIM and emails to end user.

End User 

UAA

Add User

Download cert “bundle”

Email Cert passcode

Store cert public key

Note: Cert “bundle” includes both root and certificate
Reminder

• Remember to “de-duplicate” your user email addresses for best performance!

• Instructions on this process can be found here.
**Note:** if in incognito or private modes are used when downloading certificate as an attachment, it will force you to “Save As”. Otherwise, this behavior does not happen in Chrome or Edge.
OLD AIM Certificate Tab

Certificate Renewal - 0

Users With Expiring Certificates

<table>
<thead>
<tr>
<th>Last Name</th>
<th>First Name</th>
<th>Email</th>
<th>Cert Expiration Date</th>
<th>Cert Action</th>
<th>PROFILE</th>
<th>ACCESS</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td>09/09/2023</td>
<td>RENEW</td>
<td></td>
<td></td>
<td>Let Expire</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>09/09/2023</td>
<td>RENEW</td>
<td></td>
<td></td>
<td>Let Expire</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>09/09/2023</td>
<td>LET_EXPIRE</td>
<td></td>
<td></td>
<td>Renew</td>
</tr>
<tr>
<td></td>
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</tr>
</tbody>
</table>
NEW AIM Certificate Tab
Creating a New User

To start the certificate creation process for a new user, create a new user in AIM on the Users tab (no changes).
New Process to Renew or Expire Certificates

To renew a user’s certificate, click the box next to the name(s) and click the **Generate Certificate** button.
New Screen to Create and Renew Certs

To create a new certificate, click on the Recently Renewed Certificates link.
Questions
### Cert Statuses in AIM

<table>
<thead>
<tr>
<th>Cert Status</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Active</td>
<td>AIM has just started processing the certificate.</td>
</tr>
<tr>
<td>Getting Ready To Email Password</td>
<td>The certificate has been downloaded and AIM is about to send the password to the user.</td>
</tr>
<tr>
<td>Certificate Available for Download</td>
<td>The certificate has been created and is ready to be downloaded by the UAA.</td>
</tr>
<tr>
<td>UAA Did Not Collect Certificate</td>
<td>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.</td>
</tr>
<tr>
<td>Completed</td>
<td>The certificate process has completed.</td>
</tr>
<tr>
<td>Something Went Wrong – Certificate</td>
<td>There was failure while trying to process the certificate. If this status has not change after approximately 2 hours, contact customer support.</td>
</tr>
<tr>
<td>Invalid Cert Request</td>
<td>The certificate request was deemed to be invalid. This is a very rare occurrence. Please contact customer support to determine why this occurred.</td>
</tr>
<tr>
<td>Password Emailed to User</td>
<td>The password has been emailed to the user.</td>
</tr>
<tr>
<td>Processing Before Provider</td>
<td>CAISO is processing the certificate request.</td>
</tr>
<tr>
<td>Processing At Provider</td>
<td>The certificate is being processed by the certificate provider.</td>
</tr>
</tbody>
</table>
Certificate instructions on email have been updated to reflect the new process.
Certificate Error

If:

• Your user has never had a previous CAISO certificate
• You are still using the old AIM URL (pre-F5 project)
What You Need to Do

- Your AIM profile will be automatically updated with the new functionality.
  - Notification will be sent when production date is determined
- When you are ready to create or renew a certificate in AIM, use the quick reference guide located on the caiso.com learning center [here](#).
  - The job aid has also been added to the “Application access” webpage on caiso.com
  - AIM user guide has been updated
- Report any issues with the new process via CIDI ticket if you encounter them!
Final Questions
Thank you for your participation!

For clarification on anything presented in this training, send an email to: CustomerReadiness@caiso.com

For any other questions or stakeholder specific questions or concerns, please submit a ticket.

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