

### Access and Identity Management (AIM) Enhancements

January 21, 2021

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Updated 1/21/2021

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- AIM user interface & functional enhancements
- Updated AIM User Guide



### Definitions

Abbreviation/Term	Definition
AIM	Access and Identity Management
CIRA	Customer Interface for Resource Adequacy
EIM	Energy Imbalance Market
LRA	Local Regulatory Authority
LRA ID	Local Regulatory Authority Identifier
LSE	Load Serving Entity
LSE ID	Load Serving Entity Identifier
MPP	Market Participant Portal
POC	Point of Contact
RC	Reliability Coordinator
UAA	User Access Administrator



#### Implementation timeline

## Cutover to the new version of AIM will occur on Tuesday, February 2, 2021





### AIM USER INTERFACE AND FUNCTIONAL ENHANCEMENTS



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AIM: New application URL

- Changing from (existing)
  - <u>https://portal.caiso.com/aim</u>
- Changing to (new)
  - https://aim.prod.caiso.com
- Best practice is to access applications from your respective portal (MPP, RC, EIM) to ensure you're always using the correct URL
- Contact the ISO Service Desk if you experience issues accessing the application



### First log-in/annual acknowledgement message



Dear UAA.

In order to use the AIM application, the UAA must agree to the following terms and conditions:

- All application access requests will be submitted from established UAAs based on their area of responsibility.
- Users requesting access to ISO systems must be authorized by the UAA for the specific applications and permissions being requested based on the user's role.
- All information submitted by your company in AIM, or on any ISO Application Access Request Form or Device Certificate Request form, will be current and accurate to the best of your company's knowledge.
- UAAs will immediately revoke a user's access to ISO applications when such access is no longer required due to the user's termination or a change in their job responsibilities.
- All transactions occurring under a user's certificate are the responsibility of that user.
- · Sharing certificates among multiple users is not allowed.
- If a UAA or user believes a user's certificate has been compromised, the UAA will contact the ISO immediately to revoke the certificate.
- UAAs will not provision any user or API access to an ISO production system for non-production purposes.
- All matters concerning the use of this application will be governed by the applicable terms set forth in the company's existing agreements with the ISO.
  - Check the box and submit to accept above UAA terms and conditions.

#### Submit

Please contact your client representative at 916-608-7320 with any questions.



Please close this window and reopen the AIM application in a new browser window.



### Icon changes at top of application and toolbars







### Navigation: Current tab is highlighted and other tabs change color on mouse hover





### UAA Profile Tab: References to POC have been changed to UAA to align with change in terminology

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### UAA Profile Tab: Displays other UAAs and their Authorized Entities and Contracts

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### UAAs Tab: Functionality to add additional UAAs has been added to AIM (replaces current process)

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#### Create new UAA Profile

- User drop-down will show all users who are <u>not</u> UAAs
- Text from UAA Notes stored in UAA Profile (shown on next slide)
- Environment will default to Production
- Select Start Date of today or in the future and appropriate End Date

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UAA P Create New UA	rofile UAAs A Profile	Users	Applications	Certificate Renewal	ACL Groups	Access Request	Endorsed Access Request	Email Configuration
User * UAA Notes Environment Start Date *			▼					
	Submit	Cancel						



#### **UAA** Profile

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UAA Profile	UAAs Use	rs Applications	Certificate Renewa	al ACL Groups	Access R	equest E	ndorsed	Access Request	Email Configuration			
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Create New UAA Profi	ile											
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Last Name 🛛 🔶 First Nar	me User Id	Notify AIM Org Short Nam	e Organization	Email	Start Date	End Date	Status	Cert Expiration Date	Modified By	Modified Date	PROFILE	ACCESS
Training UAA AIM	xatrainingpoc140071	Yes TRAINING	Training Organization		09/12/2014	11/29/2024	Active	03/16/2024	AIM_APP	01/13/2021 08:33	C <sup>2</sup>	C <sup>2</sup>
Training User1 AIM	xatraininguser1140072	Yes TRAINING	Training Organization		12/24/2020	12/23/2021	Active	03/16/2024	XATRAININGPOC140071	12/23/2020 11:33	-4	C2
Training User10 AIM	xatraininguser10155123	Yes TRAINING	Training Organization	-	01/13/2021	01/13/2022	Active	03/16/2024	XATRAININGPOC140071	01/13/2021 08:41		
Note: Please assig	n required Contracts	and Entities to the	other UAA's usin	g following 'Cont	tracts' and	'Entities	' drop	down options				

User ID: xatr	aininguser10155123 User Name:	AIM Training User10				
User Pro	ofile	UAA Profile				
0		Ø				
Emp No	155123	UAA ID	4346			
Account Type	EXTERNALS	Weekly Expiry Email	Yes			
User ID	xatraininguser10155123	Notes	info only			
First Name	AIM	Start Date	01/13/2021			
Last Name	Training User10	End Date	01/13/2022			
Organization	Training Organization (TRAINING)	Undated By	XATRAININGPOC140074			
Email	the second s	Undated Date	01/13/2021 08:41			
Phone Number	r	opuated Date	01/15/2021 00.41			
Address 1		User Certifi	cates			
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City						
State		Common Name	Coniel Novelse		Malial Ta	
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Country	UNITED STATES	AIM Training User1	0 05f03c	12/16/2020	03/16/2024	Active
Status	Active	AIM Training User10	03fec9	10/14/2015	01/14/2017	Inactive
		AIM Training User10	03aad0	12/15/2013	03/15/2014	Inactive



### New UAAs appear on the list of User Access Administrators immediately

	Califor	nia ISO ng a Renewed Future Ac	cess and	d Identity Ma	nageme	ent ⇔⇔xoq∢∢⊪o	) दी			
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	First Name	Last Name		Email		Status Active 🗸				
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	User Access Ad	ministrators								
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	Training User1 AIM	xatraininguser1140072 Yes TR	RAINING	Training Organization	-	12/24/2020 12/23/2021 Active 03/16/2024	XATRAININGPOC140071	12/23/2020 11:33	6	П
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		ty Scheduling Coordinator			ADS	Automated Dispatch System	EXTERNAL READ-ONLY			
$\Lambda$ now $II\Lambda\Lambda$ ch	ould				ADS	Automated Dispatch System	EXTERNAL READ-WRITE			
A HEW UAA SH	ouiu				BAAUP	Balancing Area Authority Operator Portal	EXTERNAL BAA OPERATOR			
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wait 30 minutes	after				BSAP	Base Schedule Aggregation Portal	EXTERNAL EIM ENTITY READ-O	ONLY		
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the strange file is a s	la a a a				CIDI	Customer, Inquiry, Dispute and Information	EXTERNAL IMS READ-WRITE			
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areated hafa	ro				CMRI	Customer Market Results Interface	EIM NON TO REPORTS			
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the tirst time	ב				OMAR	Operational Meter Analysis and Reporting	EXTERNAL READ - WRITE			
					OMAR	Operational Meter Analysis and Reporting	EXTERNAL READ ONLY			
					WEBOMS	Outage Management System (OATI)	EXTERNAL READ-ONLY			
					TEBUMS	Outage management System (OATI)	EATERNAL READ-WRITE			

VAA Authorized Entities
Provisionable Entities: BAA\_ID - TRAINBAA 
 Add Entity to Selected UAA



### New UAAs will not be able to provision access in AIM until they have been assigned Contracts and Entities

Stoping a Renewed Future       Access and Identity Management         UAA Profile       UAAs       Users       Applications       Certificate Renewal       ACL Groups       ////////////////////////////////////	Click on the new UAA and use the drop-down menus and buttons to assign Contracts and Entities.	Rows 10 ~           fied Date         PROFILE         ACCESS           08/2021 13:22         Image: Colspan="2">Image: Colspan="2">Image: Colspan="2">Image: Colspan="2">Image: Colspan="2">Image: Colspan="2">Image: Colspan="2"           723/2020 11:33         Image: Colspan="2">Image: Colspan="2"
▼ UAA Authorized Contracts         Provisionable Contracts         EIM ENTITY SC - EIM Entity Scheduling Coordinator ▼         Add Contract to Selected UAA         Authorized Contracts Authorized Contracts: AIM Training User1         Contract Type         ▼ UAA Authorized Entities         Provisionable Entities         BAA_ID - TRAINBAA         Add Entity to Selected UAA         Authorized Entities         Authorized Entities         Authorized Entities         BAA_ID - TRAINBAA         Add Entity to Selected UAA         Authorized Entities         Authorized Entities         Authorized Entities         Entity         Entity Type         No Data found	Applications Authorized Contract Associated App Application Name Role Entity Typ es Authorized Exception Group: Environment Start Date End Date Status Assets X No Data found	olications:



### New UAAs will not be able to provision access in AIM until they have been assigned Contracts and Entities

California ISO Access and Identity Management $\Rightarrow \Rightarrow \times \Rightarrow \Rightarrow$	Contact
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Last Name  First Name User Id Notify AIM Org Short Name Organization Email Start Date End Date Statu	Contracts/Entitles drop-
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Training User1 AIM xatraininguser1140072 Yes TRAINING Training Organization 12/24/2020 12/23/2021 Active	
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Provisionable Entities BAA_ID - TRAINBAA V Add Entity to Selected UAA	
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Entity Entity Type ACL Group Name Description Environment Start Date	End Date Status Assets
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### Contracts and Entities may vary based on the UAA selected

Click on the **UAA** to view the **Contracts** and **Entities** assigned to them.

Contract by the second se	_
UMA Profile       UMA       Users       Applications       Certificate Renewal       Accurs Request       Endored Access Request       Endored Acces Request Access Re	
First Name	
Create New UAA Profile         User Access Administrators         Image: Create New UAA Profile         Image: Create New UAA Profile     <	
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AM       straining-operators       Training Organization       094/2044       11/2/2024       Atte       034/6/2024       All APP       0400/2014 13/2       Image organization         regular       All All APP       0400/2014 13/2       Yes       Training Organization       12/24/2020       12/24/2020       12/24/2024       Atte 03/16/2024       All APP       0400/2014 13/2       Image organization         Note:       Please assign required Contracts and Entities to the other UAA's using following 'Contracts' and 'Entities' drop down options       Image organization       Image organization <td>CCESS</td>	CCESS
Wirt All       xatraininguser1140072 Ves       Training Organization       12/24/2021 12/23/2021 Active       03/16/2024       XatTAAININGPOC140071       12/23/2020 11/32       Image: Contracts         Note: Please assign required Contracts and Entities to the other UAA's using following 'Contracts' and 'Entities' drop down options       Image: Contracts' and Contracts' and 'Entities' drop down options         V UAA authorized Contracts       Image: Contracts authorized Contracts: All Training PCC       Image: Contracts Authorized Contracts: All Training PCC       Image: Contract Associated Applications       Image: Contract Associated Applications         V Contract Type       Contract Selected UAA       Image: Contract Associated Application Automated Dispatch System       EXTERNAL READ-ONLY       Contract Associated Application Pointa       EXTERNAL READ-ONLY         Application Application Pointa       EXTERNAL READ-ONLY       External READ	123
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Provisionable Contracts       EIM ENTITY SC - EIM Entity Scheduling Coordinator       Add Contract to Selected UAA         Authorized Contracts Authorized Contracts: AIM Training PCC       Associated Applications Authorized Contract Associated Applications:         Contract Type       Application       Application       Application       Role       Entity Type         Bit ENTITY SC - EIM Entity Scheduling Coordinator       Application       Application Supervisional Dispatch System       EXTERNAL READ-ONLY         BSAP       Base Schedule Appregation Potal       EXTERNAL BSC READ-ONLY       BSAP       Base Schedule Appregation Potal       EXTERNAL BSC READ-ONLY         BSAP       Base Schedule Appregation Potal       EXTERNAL BSC READ-WRITE       ESAP       Base Schedule Appregation Potal       EXTERNAL BSC READ-WRITE         CIDI       Customer, Inquiry, Dispute and Information       EXTERNAL BSC READ-WRITE       CIDI       Customer Markel Readin Information       EXTERNAL BSC READ-WRITE         CIDI       Customer, Inquiry, Dispute and Information       EXTERNAL MSC READ-WRITE       CIDI       Customer Markel Realth Information       EXTERNAL MSC READ-WRITE         CIMIR       Customer Markel Realth Information       EXTERNAL MSC READ-WRITE       CIMIR       Customer Markel Realth Information       EXTERNAL MSC READ-WRITE         CIMIR       Customer Markel Realth Information       EXTERNAL MSC READ-WRITE	
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Automated Contractis Automotized Contractiss Automatics Automatics Automated Applications Automated System       Page 2000         Contract Type       Application       Application & External, ERAD. Write         Bit ENTITY SC - EM Entity Scheduling Coordinator       Automated Dispatch System       EXTERNAL READ.WRITE         BAAOP       Bationside Appregation Portal       EXTERNAL READ.WRITE         BSAP       Base Schedule Appregation Portal       EXTERNAL BIG DEFAD.WRITE         BSAP       Base Schedule Appregation Portal       EXTERNAL BIG ERAD.WRITE         COID       Customer, Inquiry, Dispute and Information       EXTERNAL BIG READ.WRITE         COID       Customer, Inquiry, Dispute and Information       EXTERNAL BIG READ.WRITE         COID       Customer Market Results Interface       EM ENTITY REPORTS         CURRI       Customer Market Results Interface       EM TO OPERATOR         Master File (MRD)       EXTERNAL READ.WRITE         Master File Market File (MRD)       EXTERNAL READ.WRITE         Master File Market File Market Seculite Interface       EM TO OPERATOR <t< td=""><td></td></t<>	
Contract Type     Contract Type     Application Application Mane     Role     Entity Type     Application Mane     Application Mane     Role     ExtEMAL READ-ONLY     Contract Type     Application Mane     Application Mane     Contract Type     Sampling     Contract Type     Sampling	
Contract Type         Application         Application         Application         Role         Entity Type           EIM ENTITY 5C - EIM Entity Scheduling Coordinator         ADS         Automated Dispatch System         EXTERNAL READ-WRITE         ADS         Automated Dispatch System         EXTERNAL READ-WRITE         EXTERNAL READ-WRITE         EXTERNAL READ-WRITE         EXTERNAL ENA DYPEATOR         EXTERNAL ENA ENTITY READ-WRITE         ESAP         Esae Schedule Aggregation Portal         EXTERNAL ESC READ-WRITE         ESAP         Esae Schedule Aggregation Portal         EXTERNAL ESC READ-WRITE         ESAP         Esae Schedule Aggregation Portal         EXTERNAL ESC READ-WRITE         ESCIDI         Coutomer, Inquiry, Dispute and Information         EXTERNAL ESC READ-WRITE         ESCIDI         Customer, Inquiry, Dispute and Information         EXTERNAL SC READ-WRITE         ESCIDI         Customer, Inquiry, Dispute and Information         EXTERNAL SC READ-WRITE         ESCIDI         Customer, Inquiry, Dispute and Information         EXTERNAL SC READ-WRITE         ESCIDI         Customer Market Results Inferface         EIM NON TO REPORTS         CURI         Customer Market Results Inferface         EIM NON TO REPORTS         CURI         Customer Market Results Inferface         EIM NON TO REPORTS         CURI         Customer Market Results Inferface         EIM NON OPE	
EIM EXITTY SC - EIM Entity Scheduling Coordinator         ADS         Automated Dispatch System         EXTERNAL READ-ONLY           ADS         Automated Dispatch System         EXTERNAL READ-ONLY         EXTERNAL READ-ONLY           ESAP         Base Schedule Aggregation Portal         EXTERNAL BSC READ-ONLY           ESAP         Base Schedule Aggregation Portal         EXTERNAL BSC READ-ONLY           ESAP         Base Schedule Aggregation Portal         EXTERNAL BSC READ-WRITE           ESAP         Base Schedule Aggregation Portal         EXTERNAL BSC READ-WRITE           ESAP         Base Schedule Aggregation Portal         EXTERNAL BSC READ-WRITE           CIDI         Customer, Inquiry, Dispute and Information         EXTERNAL BSC READ-WRITE           CIDI         Customer, Inquiry, Dispute and Information         EXTERNAL SS READ-WRITE           CIDI         Customer, Inquiry, Dispute and Information         EXTERNAL SS READ-WRITE           CIDI         Customer, Inquiry, Dispute and Information         EXTERNAL SS READ-WRITE           CIDI         Customer, Inquiry, Dispute and Information         EXTERNAL SS READ-WRITE           CIDI         Customer, Market Results Interface         EIM NON TO REPORTS           CURI         Customer Market Results Interface         EIM NON TO REPORTS           CLARI         Customer Market Results Interface	
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BSAP     Base Schedule Aggregation Portal     EXTERNAL BISC READ-ONLY       ESAP     Base Schedule Aggregation Portal     EXTERNAL BISC READ-VIRITE       CIDI     Customer, Inquiry, Dispute and Information     EXTERNAL BSC READ-VIRITE       CIDI     Customer, Inquiry, Dispute and Information     EXTERNAL BSC READ-VIRITE       CIMIR     Customer Market Results Interface     EIM NON TO REPORTS       CURII     Customer Market Results Interface     EIM NON TO REPORTS       CARII     Customer Market Results Interface     EIM NON TO REPORTS       CARII     Customer Market Results Interface     EIM NON TO REPORTS       CMRI     Customer Market Results Interface     EIM NON TO REPORTS       CMRI     Customer Market Results Interface     EIM NON TO REPORTS       CMRII     Customer Market Results Interface     EIM NON TO REPORTS       CMRI     Customer Market Results Interface     EIM NON TO REPORTS       CMRI     Customer Market Results Interface     EIM NON TO REPORTS       MASTERFILE     Master File (MFRD)     EXTERNAL READ-ONLY       MPP     Master File (MFRD)     EXTERNAL READ-ONLY </td <td></td>	
BSAP     Base Schedule Aggregation Portal     EXTERNAL EIM ENTITY READ-WRITE       BSAP     Base Schedule Aggregation Portal     EXTERNAL EIM ENTITY READ-WRITE       CIDI     Customer, Inquiry, Dispute and Information     EXTERNAL BSC READ-WRITE       CIDI     Customer, Inquiry, Dispute and Information     EXTERNAL SSC READ-WRITE       CIDI     Customer, Inquiry, Dispute and Information     EXTERNAL SSC READ-WRITE       CIDI     Customer, Market Results Inferface     EIM NON TO REPORTS       CMRI     Customer Market Results Inferface     EIM NON TO REPORTS       CMRI     Customer Market Results Inferface     EIM NON TO REPORTS       CMRI     Customer Market Results Inferface     EIM NON TO REPORTS       CMRI     Customer Market Results Inferface     EIM NON TO REPORTS       CMRI     Customer Market Results Inferface     EIM NON TO REPORTS       CMRI     Customer Market Results Inferface     EIM NON TO REPORTS       MASTERFILE     Master Flei (MFRD)     EXTERNAL READ-ONLY       MASTERFILE     Market Results Inferface Stifferments     EXTERNAL READ ONLY       MRI-S     Market Results Inferface Stifferments     EXTERNAL READ ONLY	
BSAP     Base Schedule Aggregation Portal     EXTERNAL EIM ENTTY READ-ONLY       BSAP     Base Schedule Aggregation Portal     EXTERNAL BIS ENTTY READ-ONLY       BSAP     Base Schedule Aggregation Portal     EXTERNAL BIS CREAD-WRITE       CIDI     Customer, Inquiry, Dispute and Information     EXTERNAL BIS READ-WRITE       CIDI     Customer, Inquiry, Dispute and Information     EXTERNAL SIS READ-WRITE       CIDI     Customer, Markel Results Interface     EIM NON TO REPORTS       CMRI     Customer Markel Results Interface     EIM NON TO REPORTS       CMRI     Customer Markel Results Interface     EIM TO DERATOR       MASTERFILE     Marker Fle (MFRO)     EXTERNAL OPERATOR       MASTERFILE     Marker Fle (MFRO)     EXTERNAL READ-ONLY       MAPE     Marker Fle (MFRO)     EXTERNAL READ-ONLY       MAPE     Marker Parkoper Pretai     ORIERIAL MOP ONLY	
ESAP     Base Schedule Aggregation Portal     EXTERNAL BSC READ-WRITE       CIDI     Customer, Inquiry, Dispute and Information     EXTERNAL MS READ-WRITE       CIDI     Customer, Inquiry, Dispute and Information     EXTERNAL SSR READ-WRITE       CMRI     Customer Market Results Interface     EIM REINTY REPORTS       CMRI     Customer Market Results Interface     EIM NON TO REPORTS       CMRI     Customer Market Results Interface     EIM NON TO REPORTS       CMRI     Customer Market Results Interface     EIM NON TO REPORTS       CMRI     Customer Market Results Interface     EIM NON TO REPORTS       MASTERFILE     Master File (MFRD)     EXTERNAL READ-ONLY       MMPERFILE     Master File (MFRD)     EXTERNAL READ-ONLY       MRI-S     Market Results Interface Selfements     EXTERNAL READ ONLY	
CIDI     Customer, Inguiry, Dispute and Information     EXTERNAL MS READ-WRITE       CIDI     Customer, Inguiry, Dispute and Information     EXTERNAL SDS READ-WRITE       CMRI     Customer Market Results Interface     EME NITTY REPORTS       CMRI     Customer Market Results Interface     EIM NON TO REPORTS       CMRI     Customer Market Results Interface     EIM NON TO REPORTS       CMRI     Customer Market Results Interface     EIM NON TO REPORTS       MASTERFILE     Master Frie (MFRD)     EXTERNAL OPERATOR       MASTERFILE     Master Frie (MFRD)     EXTERNAL READ-ONLY       MPP     Market Results Interface Settlements     EXTERNAL READ-ONLY       MRI-S     Market Results Interface Settlements     EXTERNAL READ ONLY	
CARI Customer (many Uspite and Information EXTERNAL SUS REAL-WHITE CARI Customer Market Results Inferface EIM NON TO REPORTS CARI Customer Market Results Inferface EIM NON TO REPORTS CARI Customer Market Results Inferface EIM TO OPERATOR MASTERFILE Master File (MFRO) EXTERNAL DERATOR MASTERFILE Master File (MFRO) EXTERNAL DERATOR MASTERFILE Master File (MFRO) EXTERNAL DERATOR MARSTERFILE Master File (MFRO) EXTERNAL DERATOR	
CMRI Customer Market Results interface EMN ON TO REPORTS CMRI Customer Market Results interface EMN ON TO REPORTS CMRI Customer Market Results interface EMN TO DEPEATOR MASTERFILE Market File (MFRD) EXTERNAL DEPEATOR MASTERFILE Market File (MFRD) EXTERNAL READ ONLY MED Market Peatopent Preta	
CMRI         Customer Market Results Interface         EIM TO DPERATOR           MASTERFILE         Master File (MFRD)         EXTERNAL OPERATOR           MASTERFILE         Master File (MFRD)         EXTERNAL OPERATOR           MASTERFILE         Master File (MFRD)         EXTERNAL OPERATOR           MPP         Maskel Participant Portal         GENERAL MPP ONLY           MPI-S         Market Results Interface Settlements         EXTERNAL READ ONLY	
MASTERFILE         Master File (MFRD)         EXTERNAL OPERATOR           MASTERFILE         Master File (MFRD)         EXTERNAL READ-ONLY           MPP         Master File (MFRD)         EXTERNAL READ-ONLY           MPS         Market Participant Portal         GENERAL MPP ONLY           MRI-S         Market Results Interface Settlements         EXTERNAL READ ONLY	
MASTEPRILE Master File (M#RD) EXTERNAL READ-ONLY MPP Master Printpurst Pertage  Master Participant Pertage MRI-5 Master Results Interface Settlements EXTERNAL READ ONLY	
MPP Market Participant Portal GENERAL MPP ONLY MRI-S Market Results Interface Settlements EXTERNAL READ ONLY	
MRI-5 Market Results interface Settlements EXTERNAL READ ONLY	
MBLS Market Besuits Interface Settlements METED DATA DEAD WOITE	
OMAR Operational Meter Analysis and Reporting EXTERNAL READ - WRITE	
OMAR Operational Meter Analysis and Reporting EXTERNAL READ ONLY	
WEBOMS Outage Management System (OATI) EXTERNAL READ-ONLY	
WEBOMS Outage Management System (OATI) EXTERNAL READ-WRITE	
▼UAA Authorized Entities	
Provisionable Entities BAA_ID - TRAINBAA V Add Entity to Selected UAA	
Authorized Entities Authorized Entities: AIM Training POC Associated Entities OM_ENTITY_NAME: TRAIEBSC	
X 多 多 2 種	
Entity Entity Type ACL Group Name Description Environment Start Date End Date Startus Assets	
TRAIEBSC BSCID_ENT XN Data found	
TRAINBAA BAA,ID	
TRAINESC BSCID	
IRANICIM EM_ENI_DO	
Incention Andre	



#### Users Tab: New users now show up by default

So 🍣	alifori	nia ISO g a Renewed Future	Ac	cess and	Ider	ntity N	Nanagement	⇔ ⇒ X	こくく 1:1 ① 月		
UAA Prot	file	UAAs	Users	Applications	8 Ce	ertificate Rer	ewal ACL Groups	Access Request	Endorsed Access Request	Email Configura	ation
User ID		First Name		Email Status Ac	tive 🔨		Certificate Expiration Account Type	[ALL] V	~		
Users (Last Refr	reshed on: ( Jser	01-06-2021 07:13 ) U	sers Endo	orsed <b>To Us</b> (Last Re	freshed or	n: 01-5	USers Endorsed	By Us			
wy Users ≩ ∀ 🖄 ≸≣					Rows	25 🗸		(			
Last Name Training UAA	First Name AIM	Email	Status Active	Cert Expiration Date 03/16/2024				Previo	usly, users v	with	
Training User1	AIM		Active	03/16/2024	2			a sta	tus of <b>New</b> of	bit	
Training User2	AIM		Active	03/16/2024	<u>ت</u>	C2		not o	display on th	ie	
Training User3	AIM		Active	03/16/2024	C2	C2		ļ	Active list.		
Training User4	AIM		Active	03/16/2024	C2	c2		_			
Training User5	AIM		Active	03/16/2024	C2	C2					
Training User10	AIM		Active	03/16/2024	đ	đ					



### Users Tab: Users endorsed to us (renamed sub-tab)

• This tab change was implemented in a prior release, but we wanted to call it out here as a reminder

California ISO Shoping & Renewed Future Access and Identity Management $\Rightarrow X C Q Q II 0 R$						
UAA Profile UAAs	Users Applic	cations Certificate Renewal	ACL Groups	Access Request	Endorsed Access Request	Email Configuration
User ID First Name Last Name	Email Status	Active V A	Certificate Expiration	[ALL]	~	
Users (Last Refreshed on: 01-06-2021 07:13) Users Endorsed To Us (Last Refreshed on: 01-06-2021 07:13) Users Endorsed By Us						
Users Endorsed to Us						
P ⑦ ½ 差 Rows 25 →						
Last Name First Name Email User Organization Status Cert Expiration Date Endorsement Date Endorsed By UAA First Name Endorsed By UAA Last Name Endorsement Comments ENDORSED ACCESS						
× No Data found						



### Users Tab: Users endorsed by us (renamed sub-tab)

• This tab change was implemented in a prior release, but we wanted to call it out here as a reminder

California ISO Shoping a Renewed Future Access and Identity Management $\Leftrightarrow \Rightarrow \times \square \heartsuit \heartsuit \square$						
UAA Profile UAAs	Users	Applications Certificate Renewal	I ACL Groups Acces	s Request Endorsed Access Re	quest Email Configuration	'n
User ID First N	ame	Email Status Active 🗸	Certificate Expiration [ALL] Account Type [ALL]	× ×		
Users (Last Refreshed on: 01-06-2021 07:13) Users Endorsed To Us (Last Refreshed on: 01-06-2021 07:13) Users Endorsed By Us						
Users Endorsed by Us						
\$ 7 1 € ₹						Rows 25 V
Endorsed User Last Name Endorsed User First Name Endorsed User Email Endorsed To Organization Endorsed By UAA First Name Endorsed By UAA Last Name Endorsed Date VAA Comments Endorsement Check Confirmation						
Training User9 AIM		California ISO (CISO)		03/08/201	6 08:55 testing N/	A
Training User9 AIM		California ISO (CISO)		03/08/201	6 08:55 testing N/	Α



### Access Request Tab: List of applications now includes full name of application

California ISO Shoping a Renewed Future Access and Identity Management $\Leftrightarrow \Rightarrow \times \square \ll \square \square$					
UAA Pro	ofile UAAs Users	Applications Certificate R	tenewal ACL Groups Access Request Endorsed Access Request Email Configuration		
New Request	Request History	- H - H			
New Acce	ess Request				
$\checkmark \forall$					
Request ID	Description	Updated By U	Jpdated Date		
	× No Da	ta found	n		
Access request	st for applications CRR, CRRFNM, MMD/Prote	cted Data and Transmission Planning(Tl	P) requires ISO Legal department approval before access request submittal.		
Requests with	our approved legal documents will be reject	su.			
Select Users	Select Applications and Roles Copy Curr	ent User Access			
For Endorse	ed Users, ADS provisioning at the resource level	(ACL groups) and Applications not listed be	elow, please use this form		
Availabl	e Applications/Roles		Selected Applications/Roles		
3			Remove		
÷					
Application	Application Name	ble	Action Application Role Environment Entity/Conflicting Role?		
ADS	Automated Dispatch System	XTERNAL READ-ONLY			
ADS	Automated Dispatch System	XTERNAL READ-WRITE	Notes: The requested roles will be highlighted in yellow if roles conflicts with each other.		
BAAOP	Balancing Area Authority Operator Portal	XTERNAL BAA OPERATOR	Please edit or remove the conflicting roles to continue with the access request.		
BSAP	Base Schedule Aggregation Portal	XTERNAL BSC READ-ONLY			
BSAP	Base Schedule Aggregation Portal	XTERNAL BSC READ-WRITE	Add		
BSAP	Base Schedule Aggregation Portal	XTERNAL EIM ENTITY READ-ONLY	Adu		
BSAP	Base Schedule Aggregation Portal	XTERNAL EIM ENTITY READ-WRITE			
CIDI	Customer, Inquiry, Dispute and Information	XTERNAL SDS READ-WRITE			
CIDI	Customer, Inquiry, Dispute and Information	XTERNAL IMS READ-WRITE			
CMRI	MRI Customer Market Results Interface I IM ENTITY REPO				
CMRI	Customer Market Results Interface	IM TO OPERATOR			
CMRI	CMRI Customer Market Results Interface I IM NON TO REPORTS				
MASTERFILE	IASTERFILE Master File (MFRD) I XTERNAL OPERATOR				
MASTERFILE	TERFILE Master File (MFRD)				
MPP	Market Participant Portal	SENERAL MPP ONLY			
MRI-S	Market Results Interface Settlements	XTERNAL READ ONLY			
MRI-S	Market Results Interface Settlements	LETER DATA READ-WRITE			
WEBOMS	Outage Management System (OATI)	XTERNAL READ-WRITE			
WEBOMS	Outage Management System (OATI)	XTERNAL READ-ONLY			



### Request History Sub-tab: Now has filtering options available

California ISO Shoping a Renewed Future Access and Identit	ly Management		
UAA Profile UAAs Users Applications Certifica	ate Renewal ACL Groups Access Request Endorsed Access Request Email Configuration		
New Request History			
Request ID Request By (UserId): From Updated Date:	To Updated Date:		
Access Request History			
🖉 🍃 🍞 🚝 ┥ ┥ 1 - 10 of 11 🕨 🔰 📃 GO			
Req ID Requested By Requested By User Id Description	Updated Date Status		
5881 AIM Training POC xatrainingpoc140071 Automated for UAA Self Provisioning	12/23/2020 11:33 PROCESSED		
3307 AIM Training POC xatrainingpoc140071 Testing	03/08/2016 08:54 PROCESSED		
628 AIM Training POC xatrainingpoc140071 PROD webOMS Access Request for BSCID	02/17/2016 07:37 PROCESSED		
608 AIM Training POC xatrainingpoc140071 EIM App Test	09/22/2014 09:19 PROCESSED		
598 AIM Training POC xatrainingpoc140071 testing deprovisioning	09/18/2014 08:49 PROCESSED		
593 AIM Training POC xatrainingpoc140071 test baaop	09/18/2014 08:47 PROCESSED		
592 AIM Training POC xatrainingpoc140071 testing CMRI	09/17/2014 09:16 PROCESSED		
586 AIM Training POC xatrainingpoc140071 testing1234567890	09/14/2014 16:41 PROCESSED		
584 AIM Training POC xatrainingpoc140071 testing mapstage	09/14/2014 16:40 PROCESSED		
583 AIM Training POC xatrainingpoc140071 Mark Testing New Request	09/14/2014 16:39 PROCESSED		
Access Request Details			
多 🛛 🖄 結			
Last Name 🕈 First Name 🐴 CN User ID Action Enviro	Entity Status Notes		
Training User1 AIM AIM Training User1 xatraininguser1140072 ADD New fields			
added			

### Endorsed Access Request History Sub-tab: User ID and Common Name fields added for clarity

California ISO Access and Identity Management 💠 🔿	X ♥ ९ ९ 1:1 Ø Ø
UAA Profile UAAs Users Applications Certificate Renewal ACL Groups Access Requ	est Endorsed Access Request Email Configuration
Endorse/UnEndorse My Users UnEndorse Users Endorsed to Me Add/Remove Endorsed User Access Endorsed Access Request History	
Request ID	
Access Request History	You can now see
	access requests
Req ID Requested By Description Updated Date Status	submitted by
× No Data found	other LIAAs
Access Request Details	other OAAs.
> ∀ 捡 結	
Last Name 🛉 First Name 🛉 CN User ID Action Environment Application Role Entity Status Notes	
× No Data found	
Now fields	
INEW IIEIUS	
added	





- Fixed issue on UAA Profile Tab where names were not being cleared from the Endorsed Users without Access panel
- Fixed issue on Access Request Tab that was causing a refresh error during submission of new access request
- Fixed issue on Access Request Tab where duplicate entries were showing up on the Copy Current User Access panel
- Improved application speed



#### Other items of note

- Special characters:
  - The & symbol is no longer accepted in the First
     Name or Last Name fields
- Certificate renewal:
  - Reminder email messages will be sent until:
    - 1) the UAA registers for the certificate, and
    - 2) the ISO renews the certificate
  - These messages are sent out each week on Tuesday mornings



#### AIM User Guide has been updated

- AIM User Guide available on caiso.com
  - Participate > Application Access > California ISO applications > Access and Identity Management (AIM)
- Updated with new screenshots
- Includes instructions on how to complete new tasks
  - Create new UAA
  - Add Contracts and Authorized Entities to UAA profile
- AIM CBTs will be updated after go live
  - Refer to AIM User Guide in the meantime



# Questions?



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### Thank you for your participation!

# For more detailed information on anything presented, please visit our website at: <u>www.caiso.com</u>

Or send an email to: CustomerReadiness@caiso.com



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