



Access and Identity Management (AIM) Enhancements

January 21, 2021

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Customer Readiness

Updated 1/21/2021

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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

AIM: New application URL

- Changing from (existing)
 - <https://portal.caiso.com/aim>
- 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



Access and Identity Management



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.



Access and Identity Management



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

Icon changes at top of application and toolbars

California ISO Shaping a Renewed Future | Access and Identity Management

Navigation icons: Home, Back, Forward, Refresh, Search, 1:1, Help

Menu: UAA Profile | UAAs | Users | Applications | Certificate Renewal | ACL Groups | Access Request | Endorsed Access Request | Email Configuration

Reference to the AIM User Guide

UAA Status

UAA ID	1297
Account No:	140071
Weekly Expiry Email	Yes
Start Date	09/12/2014
End Date	11/29/2024

Contact Info

User ID	xatrainingpoc140071
First Name	AIM
Last Name	Training UAA
Organization	Training Organization (TRAINING)
Email	
Phone Number	

Organization

Org Short Name	TRAINING
Name	Training Organization
Address1	250 Outcropping Way
Address2	
City	
State	CA
Postal Code	
Country	UNITED STATES
Phone	

Endorsed Users without Access

1 - 0 of 0

Endorsing Org	UserID	Last Name	First Name	Comment	Requester Name	Requester Email	Requester Phone
No Data found							

NEW

California ISO Shaping a Renewed Future | Access and Identity Management

Navigation icons: Home, Back, Forward, STOP, Refresh, Search, Help

1 - 25 of 24463

OLD

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

The screenshot displays the ISO Access Management interface. At the top, there is a navigation bar with several tabs: UAA Profile, UAAs, Users, Applications, Certificate Renewal, ACL Groups, Access Request, Endorsed Access Request, and Email Configuration. The 'Applications' tab is currently selected and highlighted in a darker grey, while the other tabs are in a lighter grey. A mouse cursor is hovering over the 'Applications' tab, which is highlighted with an orange callout box labeled 'Mouse Hover'. The 'UAA Profile' tab is also highlighted with an orange callout box labeled 'Current Tab'. Below the navigation bar, there is a link 'Reference to the AIM User Guide'. The main content area is divided into three sections: 'UAA Status', 'Contact Info', and 'Organization'. Each section contains a table of data. Below these sections is a table titled 'Endorsed Users without Access' with a search bar and a 'GO' button. The table shows no data, with a message 'No Data found'.

UAA Status

UAA ID	1297
Account No:	140071
Weekly Expiry Email	Yes
Start Date	09/12/2014
End Date	11/29/2024

Contact Info

User ID	xatrainingpoc140071
First Name	AIM
Last Name	Training UAA
Organization	Training Organization (TRAINING)
Email	
Phone Number	

Organization

Org Short Name	TRAINING
Name	Training Organization
Address1	250 Outcropping Way
Address2	
City	
State	CA
Postal Code	
Country	UNITED STATES
Phone	

Endorsed Users without Access

1 - 0 of 0

Endorsing Org	UserID	Last Name	First Name	Comment	Requester Name	Requester Email	Requester Phone
No Data found							

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

California ISO Shaping a Renewed Future

Access and Identity Management

UAA Profile UAA Users Applications Certificate Renewal ACL Groups Access Request Endorsed Access Request Email Configuration

[Reference to the AIM User Guide](#)

UAA Status

UAA ID	1297
Account No:	140071
Weekly Expiry Email	Yes
Start Date	09/12/2014
End Date	11/29/2024

Contact Info

User ID	xatrainingpoc140071
First Name	AIM
Last Name	Training UAA
Organization	Training Organization (TRAINING)
Email	
Phone Number	

Organization

Org Short Name	TRAINING
Name	Training Organization
Address1	250 Outcropping Way
Address2	
City	
State	CA
Postal Code	
Country	UNITED STATES
Phone	

Endorsed Users without Access

1 - 0 of 0

Endorsing Org	UserID	Last Name	First Name	Comment	Requester Name	Requester Email	Requester Phone
No Data found							

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

California ISO Shopping a Renewed Future | Access and Identity Management

UAA Profile | UAAs | Users | Applications | Certificate Renewal | ACL Groups | Access Request | Endorsed Access Request | Email Configuration

Reference to the AIM User Guide

UAA Status

UAA ID	1297
Account No:	140071
Weekly Expiry Email	Yes
Start Date	09/12/2014
End Date	11/29/2024

Contact Info

User ID	zatraininpoc140071
First Name	AIM
Last Name	Training UAA
Organization	Training Organization (TRAINING)
Email	
Phone Number	

Organization

Org Short Name	TRAINING
Name	Training Organization
Address1	250 Outcropping Way
Address2	
City	
State	CA
Postal Code	
Country	UNITED STATES
Phone	

Endorsed Users without Access

Endorsing Org	UserID	Last Name	First Name	Comment	Requester Name	Requester Email	Requester Phone
No Data found							

Authorized Contracts

Contract Type
EIM ENTITY SC - EIM Entity Scheduling Coordinator

Associated Applications

Application	Application Name	Role	Entity Type
ADS	Automated Dispatch System	EXTERNAL READ-ONLY	
ADS	Automated Dispatch System	EXTERNAL READ-WRITE	
BAAOP	Authority Operator Portal	EXTERNAL READ-ONLY	
OWAR	Operational Meter Awareness	EXTERNAL READ ONLY	
WEBOMS	Outage Management System (OATI)	EXTERNAL READ-ONLY	
WEBOMS	Outage Management System (OATI)	EXTERNAL READ-WRITE	

Authorized Entity

Entity	Type
TRAIEBSC	BSCID_ENT
TRAINBAA	BAA_ID
TRAINBSC	BSCID
TRAINEIM	EIM_ENT_ID
TRAINING	SCID

Associated Entities Entity: TRAIEBSC

ACL Group Name	Description	Environment	Start Date	End Date	Status	Assets
No Data found						

Rims Projects Entity: TRAIEBSC

Project Code	Project Name	Project Type	Queue Number	IC Legal Entity
TRAIEBSC	TRAIEBSC_TEST	Cluster		

Other UAAs in My Organization

First Name	Last Name	Email
AIM	Training User1	

Authorized Entities for the UAA

Entity	Type
No Data found	

Authorized Contracts for the UAA

Contract Type
No Data found

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

California ISO | Access and Identity Management

Navigation: UAA Profile | **UAAs** | Users | Applications | Certificate Renewal | ACL Groups | Access Request | Endorsed Access Request | Email Configuration

Search: First Name [] Last Name [] Email [] Status: Active

Create New UAA Profile

User Access Administrators

Last Name	First Name	User Id	Notify	AIM Org Short Name	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	01/06/2021 09:58		
Training User1	AIM	xatraininguser1140072	Yes	TRAINING	Training Organization		12/24/2020	12/23/2021	Active	03/16/2024	XATRainingPOC140071	12/23/2020 11:33		

Note: Please assign required Contracts and Entities to the other UAA's using following 'Contracts' and 'Entities' drop down options

▼ UAA Authorized Contracts

Provisionable Contracts: EIM ENTITY SC - EIM Entity Scheduling Coordinator **Add Contract to Selected UAA**

Authorized Contracts Authorized Contracts: AIM Training POC

Contract Type
EIM ENTITY SC - EIM Entity Scheduling Coordinator

Associated Applications Authorized Contract Associated Applications:

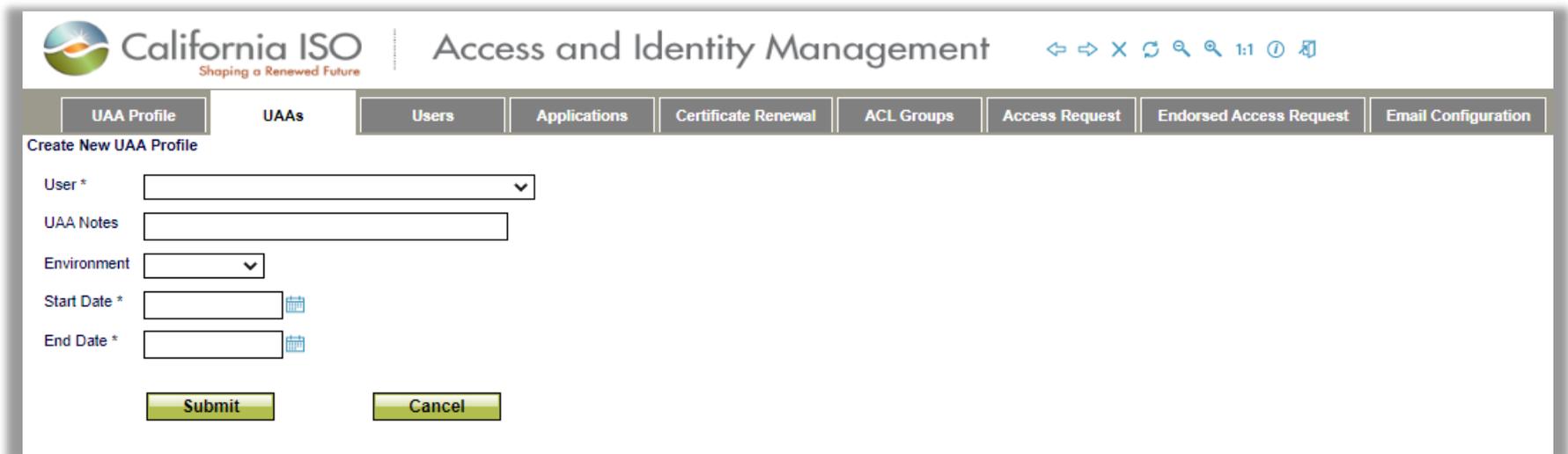
Application	Application Name	Role	Entity Type
ADS	Automated Dispatch System	EXTERNAL READ-ONLY	
ADS	Automated Dispatch System	EXTERNAL READ-WRITE	
BAAOP	Balancing Area Authority Operator Portal	EXTERNAL BAA OPERATOR	
BSAP	Base Schedule Aggregation Portal	EXTERNAL BSC READ-ONLY	
BSAP	Base Schedule Aggregation Portal	EXTERNAL EIM ENTITY READ-WRITE	
BSAP	Base Schedule Aggregation Portal	EXTERNAL EIM ENTITY READ-ONLY	
BSAP	Base Schedule Aggregation Portal	EXTERNAL BSC READ-WRITE	
CIDI	Customer, Inquiry, Dispute and Information	EXTERNAL IMS READ-WRITE	
CIDI	Customer, Inquiry, Dispute and Information	EXTERNAL SDS READ-WRITE	
CMRI	Customer Market Results Interface	EIM ENTITY REPORTS	
CMRI	Customer Market Results Interface	EIM NON TO REPORTS	
CMRI	Customer Market Results Interface	EIM TO OPERATOR	
MASTERFILE	Master File (MFRD)	EXTERNAL OPERATOR	
MASTERFILE	Master File (MFRD)	EXTERNAL READ-ONLY	
MPP	Market Participant Portal	GENERAL MPP ONLY	
MRI-S	Market Results Interface Settlements	EXTERNAL READ ONLY	
MRI-S	Market Results Interface Settlements	METER DATA READ-WRITE	
OMAR	Operational Meter Analysis and Reporting	EXTERNAL READ - WRITE	
OMAR	Operational Meter Analysis and Reporting	EXTERNAL READ ONLY	
WEBOMS	Outage Management System (OAT)	EXTERNAL READ-ONLY	
WEBOMS	Outage Management System (OAT)	EXTERNAL READ-WRITE	

▼ UAA Authorized Entities

Provisionable Entities: BAA_ID - TRAINBAA **Add Entity to Selected UAA**

Create new UAA Profile

- User drop-down will show all users who are not 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**



The screenshot displays the 'California ISO Access and Identity Management' web interface. The top navigation bar includes the California ISO logo and the text 'Shaping a Renewed Future'. The main title is 'Access and Identity Management'. Below the title is a horizontal menu with tabs for 'UAA Profile', 'UAAs', 'Users', 'Applications', 'Certificate Renewal', 'ACL Groups', 'Access Request', 'Endorsed Access Request', and 'Email Configuration'. The 'UAA Profile' tab is selected. The main content area is titled 'Create New UAA Profile' and contains the following form fields:

- User ***: A dropdown menu.
- UAA Notes**: A text input field.
- Environment**: A dropdown menu.
- Start Date ***: A date input field with a calendar icon.
- End Date ***: A date input field with a calendar icon.

At the bottom of the form are two buttons: 'Submit' and 'Cancel'.

UAA Profile

California ISO | Access and Identity Management

UAA Profile | UAAs | Users | Applications | Certificate Renewal | ACL Groups | Access Request | Endorsed Access Request | Email Configuration

First Name: Last Name: Email: Status: Active

[Create New UAA Profile](#)

User Access Administrators

Last Name	First Name	User Id	Notify	AIM Org Short Name	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		
Training User1	AIM	xatraininguser1140072	Yes	TRAINING	Training Organization		12/24/2020	12/23/2021	Active	03/16/2024	XATRainingPOC140071	12/23/2020 11:33		
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 assign required Contracts and Entities to the other UAA's using following 'Contracts' and 'Entities' drop down options

User ID: xatraininguser10155123 User Name: AIM Training User10

User Profile

Emp No	155123
Account Type	EXTERNALS
User ID	xatraininguser10155123
First Name	AIM
Last Name	Training User10
Organization	Training Organization (TRAINING)
Email	
Phone Number	
Address 1	
Address 2	
City	
State	
Postal Code	
Country	UNITED STATES
Status	Active

UAA Profile

UAA ID	4346
Weekly Expiry Email	Yes
Notes	info only
Start Date	01/13/2021
End Date	01/13/2022
Updated By	XATRainingPOC140071
Updated Date	01/13/2021 08:41

User Certificates

Common Name	Serial Number	Valid From	Valid To	Cert Status	Cert Action
AIM Training User10	05f03c	12/16/2020	03/16/2024	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

The screenshot shows the 'Access and Identity Management' interface for California ISO. The 'User Access Administrators' table is highlighted with an orange border. Below the table, there are sections for 'UAA Authorized Contracts' and 'UAA Authorized Entities', each with a dropdown menu and an 'Add' button. To the right, there is a table for 'Associated Applications Authorized Contract Associated Applications:'.

Last Name	First Name	User Id	Notify	AIM Org Short Name	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	01/06/2021 09:58		
Training User1	AIM	xatraininguser1140072	Yes	TRAINING	Training Organization		12/24/2020	12/23/2021	Active	03/16/2024	XATRainingPOC140071	12/23/2020 11:33		

Application	Application Name	Role	Entity Type
ADS	Automated Dispatch System	EXTERNAL READ-ONLY	
ADS	Automated Dispatch System	EXTERNAL READ-WRITE	
BAAOP	Balancing Area Authority Operator Portal	EXTERNAL BAA OPERATOR	
BSAP	Base Schedule Aggregation Portal	EXTERNAL BSC READ-ONLY	
BSAP	Base Schedule Aggregation Portal	EXTERNAL EIM ENTITY READ-WRITE	
BSAP	Base Schedule Aggregation Portal	EXTERNAL EIM ENTITY READ-ONLY	
BSAP	Base Schedule Aggregation Portal	EXTERNAL BSC READ-WRITE	
CIDI	Customer, Inquiry, Dispute and Information	EXTERNAL IMS READ-WRITE	
CIDI	Customer, Inquiry, Dispute and Information	EXTERNAL SDS READ-WRITE	
CMRI	Customer Market Results Interface	EIM ENTITY REPORTS	
CMRI	Customer Market Results Interface	EIM NON TO REPORTS	
CMRI	Customer Market Results Interface	EIM TO OPERATOR	
MASTERFILE	Master File (MFRD)	EXTERNAL READ-ONLY	
MPP	Market Participant Portal	GENERAL MPP ONLY	
MRI-S	Market Results Interface Settlements	EXTERNAL READ ONLY	
MRI-S	Market Results Interface Settlements	METER DATA READ-WRITE	
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	

Note: Please assign required Contracts and Entities to the other UAA's using following 'Contracts' and 'Entities' drop down options

A new UAA should wait 30 minutes after their profile has been created before logging into AIM for the first time.

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

Click on the new **UAA** and use the drop-down menus and buttons to assign **Contracts** and **Entities**.

The screenshot displays the California ISO Access and Identity Management (AIM) interface. At the top, there are navigation tabs for UAA Profile, UAAs, Users, Applications, Certificate Renewal, and ACL Groups. Below these are input fields for First Name, Last Name, and Email, along with a 'Create New UAA Profile' button. A table titled 'User Access Administrators' lists existing users, including 'Training UAA' and 'Training User1'. A callout box points to the 'Training User1' row. Below the table, a note states: 'Note: Please assign required Contracts and Entities to the other UAA's using following 'Contracts' and 'Entities' drop down options'. The 'UAA Authorized Contracts' section shows a dropdown menu with 'EIM ENTITY SC - EIM Entity Scheduling Coordinator' selected and an 'Add Contract to Selected UAA' button. Below this is a table for 'Authorized Contracts' and an 'Associated Applications' table. The 'UAA Authorized Entities' section shows a dropdown menu with 'BAA_ID - TRAINBAA' selected and an 'Add Entity to Selected UAA' button. Below this is a table for 'Authorized Entities' and an 'Associated Entities' table. Both 'Authorized' tables show 'No Data found'.

UAA Authorized Contracts

Provisionable Contracts: EIM ENTITY SC - EIM Entity Scheduling Coordinator Add Contract to Selected UAA

Authorized Contracts Authorized Contracts: AIM Training User1

Associated Applications Authorized Contract Associated Applications:

Application	Application Name	Role	Entity Type
No Data found			

UAA Authorized Entities

Provisionable Entities: BAA_ID - TRAINBAA Add Entity to Selected UAA

Authorized Entities Authorized Entities: AIM Training User1

Associated Entities Authorized Exception Group:

ACL Group Name	Description	Environment	Start Date	End Date	Status	Assets
No Data found						

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

Contact SCRequests@caiso.com to address any discrepancies in the Contracts/Entities drop-down menus.

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
No Data found

Associated Applications Authorized Contract Associated Applications:

Application	Application Name	Role	Entity Type
No Data found			

UAA Authorized Entities

Provisionable Entities: BAA_ID - TRAINBAA Add Entity to Selected UAA

Authorized Entities Authorized Entities: AIM Training User1

Entity	Entity Type
No Data found	

Associated Entities Authorized Exception Group:

ACL Group Name	Description	Environment	Start Date	End Date	Status	Assets
No Data found						

Contracts and Entities may vary based on the UAA selected

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

The screenshot displays the 'Access and Identity Management' interface for California ISO. The 'UAA Profile' tab is active, showing a list of 'User Access Administrators'. The selected UAA is 'AIM Training POC'. Below the list, there are sections for 'UAA Authorized Contracts' and 'UAA Authorized Entities'. The 'Authorized Contracts' section shows a table of contracts assigned to the UAA, including 'AIM ENTITY SC - EIM Entity Scheduling Coordinator'. The 'Associated Applications' table lists various applications and their roles, such as 'Automated Dispatch System' with 'EXTERNAL READ-WRITE' access. The 'Authorized Entities' section shows a table of entities assigned to the UAA, including 'BSCID_ENT', 'BAA_ID', 'BSCID', 'EIM_ENT_ID', and 'SCID'. The 'Associated Entities' table is currently empty, showing 'No Data found'.

Last Name	First Name	User Id	Notify	AIM Org Short Name	Organization	Email	Start Date	End Date	Status	Cert Expiration Date	Modified By	Modified Date	PROF	ACCESS
	AIM	xatrainingpoc140074	Yes	TRAINING	Training Organization		09/12/2014	11/29/2024	Active	03/16/2024	AIM_APP	01/09/2021 13:22		
	ing User1	AIM	xatraininguser1140072	Yes	TRAINING	Training Organization	12/24/2020	12/23/2021	Active	03/16/2024	XATRainingPOC140071	12/23/2020 11:33		

Contract Type	Authorized Contracts
EIM ENTITY SC - EIM Entity Scheduling Coordinator	AIM Training POC

Application	Application Name	Role	Entity Type
ADS	Automated Dispatch System	EXTERNAL READ-ONLY	
ADS	Automated Dispatch System	EXTERNAL READ-WRITE	
BAAOP	Balancing Area Authority Operator Portal	EXTERNAL BAA OPERATOR	
BSAP	Base Schedule Aggregation Portal	EXTERNAL BSC READ-ONLY	
BSAP	Base Schedule Aggregation Portal	EXTERNAL EIM ENTITY READ-WRITE	
BSAP	Base Schedule Aggregation Portal	EXTERNAL EIM ENTITY READ-ONLY	
BSAP	Base Schedule Aggregation Portal	EXTERNAL BSC READ-WRITE	
CIDI	Customer, Inquiry, Dispute and Information	EXTERNAL IMS READ-WRITE	
CIDI	Customer, Inquiry, Dispute and Information	EXTERNAL SDS READ-WRITE	
CMRI	Customer Market Results Interface	EIM ENTITY REPORTS	
CMRI	Customer Market Results Interface	EIM NON TO REPORTS	
CMRI	Customer Market Results Interface	EIM TO OPERATOR	
MASTERFILE	Master File (MFRD)	EXTERNAL OPERATOR	
MASTERFILE	Master File (MFRD)	EXTERNAL READ-ONLY	
MPP	Market Participant Portal	EXTERNAL MPP ONLY	
MPP	Market Participant Portal	EXTERNAL READ-ONLY	
MRI-S	Market Results Interface Settlements	METER DATA READ-WRITE	
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	

Entity	Entity Type
TRAIEBSC	BSCID_ENT
TRAINBAA	BAA_ID
TRAINBSC	BSCID
TRAINEIM	EIM_ENT_ID
TRAINING	SCID

ACL Group Name	Description	Environment	Start Date	End Date	Status/Assets
No Data found					

Users Tab: New users now show up by default

California ISO Shaping a Renewed Future

Access and Identity Management

UAA Profile | UAAs | **Users** | Applications | Certificate Renewal | ACL Groups | Access Request | Endorsed Access Request | Email Configuration

User ID: First Name: Last Name: Email: Certificate Expiration: [ALL] Status: Active 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

Create New User

My Users

Rows: 25

Last Name	First Name	Email	Status	Cert Expiration Date	PROFILE	ACCESS
Training UAA	AIM		Active	03/16/2024		
Training User1	AIM		Active	03/16/2024		
Training User2	AIM		Active	03/16/2024		
Training User3	AIM		Active	03/16/2024		
Training User4	AIM		Active	03/16/2024		
Training User5	AIM		Active	03/16/2024		
Training User10	AIM		Active	03/16/2024		

Previously, users with a status of **New** did not display on the **Active** list.

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

The screenshot displays the California ISO Access and Identity Management interface. The top navigation bar includes the California ISO logo and the text 'Access and Identity Management'. Below this, a series of tabs are visible: UAA Profile, UAAs, Users, Applications, Certificate Renewal, ACL Groups, Access Request, Endorsed Access Request, and Email Configuration. The 'Users' tab is currently selected. Below the tabs, there are search and filter fields for User ID, First Name, Last Name, Email, Status (set to 'Active'), Certificate Expiration (set to '[ALL]'), and Account Type (set to '[ALL]').

Below the search fields, there are three sub-tab options: 'Users (Last Refreshed on: 01-06-2021 07:13)', 'Users Endorsed To Us (Last Refreshed on: 01-06-2021 07:13)', and 'Users Endorsed By Us'. The 'Users Endorsed To Us' sub-tab is highlighted with an orange border.

The main content area is titled 'Users Endorsed to Us' and features a table with the following columns: 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, and ENDORSED ACCESS. The table currently displays 'No Data found'. A 'Rows' dropdown menu is set to '25'.

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

The screenshot displays the California ISO Access and Identity Management interface. The top navigation bar includes the California ISO logo and the text 'Access and Identity Management'. Below this, a series of tabs are visible: 'UAA Profile', 'UAAs', 'Users', 'Applications', 'Certificate Renewal', 'ACL Groups', 'Access Request', 'Endorsed Access Request', and 'Email Configuration'. The 'Users' tab is active, and within it, the 'Users Endorsed by Us' sub-tab is highlighted with an orange box. The interface includes search filters for User ID, First Name, Last Name, Email, Status (set to 'Active'), Certificate Expiration (set to '[ALL]'), and Account Type (set to '[ALL]'). Below the filters, there are three sub-tab options: 'Users (Last Refreshed on: 01-06-2021 07:13)', 'Users Endorsed To Us (Last Refreshed on: 01-06-2021 07:13)', and 'Users Endorsed By Us'. The 'Users Endorsed by Us' sub-tab is selected, displaying a table with the following data:

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	UAA Comments	Endorsement Check Confirmation
Training User9	AIM		California ISO (CISO)			03/08/2016 08:55	testing	N/A

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

California ISO
Shaping a Renewed Future

Access and Identity Management

Navigation: UAA Profile | UAAs | Users | Applications | Certificate Renewal | ACL Groups | **Access Request** | Endorsed Access Request | Email Configuration

Request Status: New Request | Request History

New Access Request

Request ID	Description	Updated By	Updated Date
No Data found			

Access request for applications CRR, CRRFNM, MMD/Protected Data and Transmission Planning(TP) requires ISO Legal department approval before access request submittal. Requests without approved legal documents will be Rejected.

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](#)

Available Applications/Roles

Application	Application Name	Role
ADS	Automated Dispatch System	EXTERNAL READ-ONLY
ADS	Automated Dispatch System	EXTERNAL READ-WRITE
BAAOP	Balancing Area Authority Operator Portal	EXTERNAL BAA OPERATOR
BSAP	Base Schedule Aggregation Portal	EXTERNAL BSC READ-ONLY
BSAP	Base Schedule Aggregation Portal	EXTERNAL BSC READ-WRITE
BSAP	Base Schedule Aggregation Portal	EXTERNAL EIM ENTITY READ-ONLY
BSAP	Base Schedule Aggregation Portal	EXTERNAL EIM ENTITY READ-WRITE
CIDI	Customer, Inquiry, Dispute and Information	EXTERNAL SDS READ-WRITE
CIDI	Customer, Inquiry, Dispute and Information	EXTERNAL IMS READ-WRITE
CMRI	Customer Market Results Interface	EIM ENTITY REPORTS
CMRI	Customer Market Results Interface	EIM TO OPERATOR
CMRI	Customer Market Results Interface	EIM NON TO REPORTS
MASTERFILE	Master File (MFRD)	EXTERNAL OPERATOR
MASTERFILE	Master File (MFRD)	EXTERNAL READ-ONLY
MPP	Market Participant Portal	GENERAL MPP ONLY
MRI-S	Market Results Interface Settlements	EXTERNAL READ ONLY
MRI-S	Market Results Interface Settlements	METER DATA READ-WRITE
WEBOMS	Outage Management System (OATI)	EXTERNAL READ-WRITE
WEBOMS	Outage Management System (OATI)	EXTERNAL READ-ONLY

Selected Applications/Roles

Action	Application	Role	Environment	Entity	Conflicting Role?
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Remove

Add

Notes: The requested roles will be highlighted in yellow if roles conflicts with each other. Please edit or remove the conflicting roles to continue with the access request.

Request History Sub-tab: Now has filtering options available

The screenshot shows the California ISO Access and Identity Management interface. The top navigation bar includes tabs for UAA Profile, UAAs, Users, Applications, Certificate Renewal, ACL Groups, Access Request, Endorsed Access Request, and Email Configuration. The 'Request History' sub-tab is selected, indicated by an orange arrow. Below the navigation bar, there is a filtering section with input fields for Request ID, Request By (Userid), From Updated Date, and To Updated Date. The main content area displays the 'Access Request History' table, which lists various requests with columns for Req ID, Requested By, Requested By User ID, Description, Updated Date, and Status. Below the history table, the 'Access Request Details' section is visible, showing a table with columns for Last Name, First Name, CN, User ID, Action, Environ, Entity, Status, and Notes. A callout box points to the 'CN' and 'User ID' columns in the details table, stating 'New fields added'.

Access Request History

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	testing 1234567890	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

Last Name	First Name	CN	User ID	Action	Environ	Entity	Status	Notes
Training User1	AIM	AIM Training User1	xatraininguser1140072	ADD		INTERNAL PARTICIPANTS	COMPLETED	

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

California ISO
Shaping a Renewed Future

Access and Identity Management

UAA Profile | UAAs | Users | Applications | Certificate Renewal | ACL Groups | Access Request | **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

Req ID	Requested By	Description	Updated Date	Status
No Data found				

Access Request Details

Last Name	First Name	CN	User ID	Action	Environment	Application	Role	Entity	Status	Notes
No Data found										

You can now see access requests submitted by other UAAs.

New fields added

Bug Fixes

- 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?



Thank you for your participation!

For more detailed information on anything presented, please
visit our website at:

www.caiso.com

Or send an email to:
CustomerReadiness@caiso.com