



California ISO

Customer Experience Improvements for Customer Inquiry and
Dispute Information (CIDI) application Customer Partnership Group

Purpose

- The purpose of the CIDI CPG is to discuss:
 - recent changes
 - open variances
 - future enhancements
 - walk through functionality upon user requests
 - provide a forum for users to collaborate on “best practices”
 - open questions

Resent Changes

The ISO recently implemented a new case record type in CIDI. This case record type is labeled “Reliability Coordinator Inquiry”. This was to provide a support mechanism for Reliability Coordinator Services and ensure these records were tracked separately.

New Case

Select a Record Type Reliability Coordinator Inquiry ▼

Please only use this Record Type if you are a Reliability Coordinator Entity.

Known Variances

Variance #	Type	Description	Details	Status	Priority
1	ALL	"My Cases" views aren't working in CIDI Communities portal. External user does not get any case results when selecting any of the case views filtered for "my cases"	ISO is working on this issue and hopes to have it resolved in the near future. Workaround: use "ALL" option for views, or dashboard reports	Open	2
2	ALL	After clicking "Next" when submitting a case, nothing happens. Cases are not created and user is unable to submit case.	ISO believes it has resolved this issue early last week. Users should not experience this when submitting cases any longer.	Fixed	1

Enhancement Requests

Enhancement #	Type	Description	Details	Status	Priority
1	SDS	Add Email Recipient field to the dispute form.	Yes. Note, editing of the Email Recipient field will follow existing rules and not be editable after the dispute window closes.	In Progress	3
2	ALL	Ability to export reports, views, and/or search results.	There are two options that are offered by salesforce that the ISO is researching to find the best solution for this implementation. Workaround: Users have the ability to "copy and paste" by highlighting fields and pasting into excel which will allow them to filter and print results accordingly.	In Progress	1
3	ALL	Ability to Print reports, views, and/or search results.	The ISO is researching to find the best solution for this implementation. Workaround: Users have the ability to "copy and paste" by highlighting fields and pasting into excel which will allow them to filter and print results accordingly.	In Progress	2
4	SDS	The ability to update the dispute after the dispute deadline, and the ability to accept/decline a dispute resolution rather than the current process of contacting the dispute team to re-open the dispute.	Legal has responded that due to the fact that disputes are different than general inquiries with tariff defined requirements and timelines, we will not be pursuing these enhancements to the dispute in CIDI.	Closed	Closed
5	ALL	The ability for an external user to reassign IMS/SDS cases in the event of the submitters vacation/retirement?	Discussed with IT and this request is not feasible due to security concerns. Users can include others within the organization on the email recipients field. This will allow those users to receive updates via email upon case status changes.	Closed	Closed

Enhancement Requests Cont.

Enhancement #	Type	Description	Details	Status	Priority
6	SDS	Change field label from Trade Hours to Hour Ending on the dispute form.	Since the BPM uses the term trading hours, we decided to keep the field label Trade Hours, but add language to the hover help of "Settlements are for hour ending" to add clarity.	Implemented	Implemented
7	ALL	Ability to view "who" submitted case.	Contact Name has been added to multiple views, all dashboard reports, and search results.	Implemented	Implemented
8	ALL	Ability to identify when a case was "modified"	This has been implemented by adding the "Case Last Modified Date" field in the "Cases Requiring Action" report. Users have the ability to modify the filters if needed to view other results.	Implemented	Implemented
9	ALL	Ability for user to see "ALL" cases for all SCIDs under their organization.	As long as the logged in user has access to the associated SCIDs they will be able to view all cases that are submitted under those IDs.	Current Functionality	Current Functionality
10	ALL	The ability to resize the description field on the IMS/SDS form.	In researching this request we found that this ability is available (and currently working) when using the Chrome browser, but not a feature of IE.	Current Functionality	Current Functionality
11	ALL	Ability to sort, filter, and report on different field criteria	<p>Report: The dashboards provided under the Cases tab allow users to modify the pre-defined filter criteria and pull results accordingly.</p> <p>Search: Users have the ability to modify, filter, and sort search results on any of the fields that are returned in the view.</p> <p>Views: Users have the ability to sort and refine results by using the "Search List" option.</p> <p>Please refer to CIDI User Guide for steps on how to accomplish above.</p>	Current Functionality	Current Functionality

Walk through functionality requests?

Questions?

References

- User Guide:
http://www.caiso.com/Documents/NewCustomerInquiry_DisputeandInformation_CIDI_UserGuide.pdf
- Video Walk Through:
<https://youtu.be/gfXD-ojxS5U>
- For future Enhancement Requests, please continue to submit via CIDI with the subject of “2019 CIDI Enhancement”.