


Market Participant Issue Management System (IMS) Quick Reference Sheet

1. For current production, open Internet Explorer and type:
<https://portal.caiso.com>
 2. Select [Enter Issue Management](#) in the Issue Management section
- Or** 
1. For [Market Sim](#), open Internet Explorer and type:
<https://mktsim.caiso.com/mpp/>
 2. Click **IMS** in the **CAISO Applications** on the left side of the web page.
 3. Click “New Issue” button.
 4. The “Log An Issue” screen displays
 - Client Name (your company) fills in automatically
 - Your Name fills in automatically
 - Your Email address fills in automatically
 - Your Phone # is not filled in

5. Select the SCID for the issue
Note: Selecting the SCID here is important to ensure the Issue is logged against the correct SCID.
6. Enter:
 - Your Phone #
 - **Subject.** This is a required field. This should be a short description of the issue
 - **Full Description** that further describes the issue in detail

For issues specific to Market Sim,  **please include:**

 - Trade Date and Trade Hour issue encountered
 - Suggested Priority
 - Impacted System (i.e SIBR, OASIS)
7. To add an “attachment”:
 - Click the **Add** button
 - Click “Browse” to choose the “File Name” of the document
 - Attachment is added and Issue ticket is complete
8. Click “Submit” to return to the “Issue Management” screen

Ticket Status

Once an Issue is created, click on the issue to select and it will be highlighted

9. Click “New Log Entry” button.

Note: The “Issue Tracker – Work Log” screen opens.

10. Complete the Subject and the Description:

- The “Subject” of the new log entry for this issue
- A full “Description” of this work log entry.

11. Click Save to add Work Log to the issue.

12. Click the Refresh button to display the added Work Log entry.

NOTE: The **Work Log Entry** is good to use when  “testing” resolved Mkt Sim issues/defects.

If your issue is deemed to be a defect, CAISO will resolve the ticket and provide you with a MQC number in the work log for future tracking as part of the Market Sim existing process.

New – A ticket will have this status when it is first created .
(system generated)

Assigned – A ticket will have this status when the issue has been routed to the appropriate internal individual for assignment (system generated) – ****This will replace the current email notification that your issue has been logged.**

With Customer – A ticket with this status indicates a need for more information required from the external customer OR when a Market Sim defect needs to be tested.
(manually changed by Client Rep)

Work In Progress – A ticket will be changed to this status when the Subject Matter Expert is working on the issue.
(manually changed)

Resolved – A ticket will be changed to this status when the Subject Matter Expert has resolved the issue. (manually changed by SME)

Closed – A ticket has this status when the resolution has been communicated to the client. (manually changed)

Detailed Reference information: 

A [User Guide](#) and a [Computer Based training module](#) can be found on this web page:

<http://www.caiso.com/1c3c/1c3ce2fb25760.html>