



# Ask ISO User Guide

*Customer Support Issue Tracking System*

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## Change Summary

<b>Document Revision</b>	<b>Date</b>	<b>Comments</b>
Original	August 30, 2011	Initial release
1.0	January 4, 2012	Updated Create New Issue screen shot and associated details for revised order of entry fields.

# Ask ISO User Guide

## Table of Contents

1.	How to get access to <i>Ask ISO</i> .....	2
2.	Logging in to <i>Ask ISO</i> .....	2
3.	<i>Ask ISO</i> home page features.....	3
	Logged in as.....	3
	Home   SMD   ISO-NE links .....	3
	Announcements.....	3
	Look up my existing Issues.....	3
	Request Support links .....	3
4.	Creating a New Issue .....	4
	Category .....	4
	Issue Summary .....	4
	Issue Description.....	4
	Need by Date .....	4
	Attach Document.....	5
	Save Issue.....	5
5.	Tracking the Issue .....	5
	• You have ## open issues .....	5
	• You have ## closed issues .....	5
	• OR Enter an Issue number .....	5
6.	Closing the Issue .....	6

# Ask ISO User Guide

Ask ISO is a self-service web application developed to enable market participants of ISO New England to submit their questions, requests and registration forms through an easy to use interface. Each submittal is classified as an **Issue** and given a unique **ID number**. Users can track their Issues directly through Ask ISO from the original or 'Submitted' state through to the completed or 'Closed' state.

Each Issue is visible only to the user who submits it and to ISO-NE. Your Issues are not visible to any other user of Ask ISO.

## 1. How to get access to Ask ISO, the Customer Support Issue Tracking System

- You must have a valid Digital Certificate issued by ISO-NE.
- Your company's Security Administrator must assign you the *Ask ISO External User* application role in the Customer and Asset Management System (CAMS). This will allow you to create, view, edit and track your Issues.

## 2. Logging In to Ask ISO

Secure access to Ask ISO is from the SMD Applications Home Page at: <https://smd.iso-ne.com>.

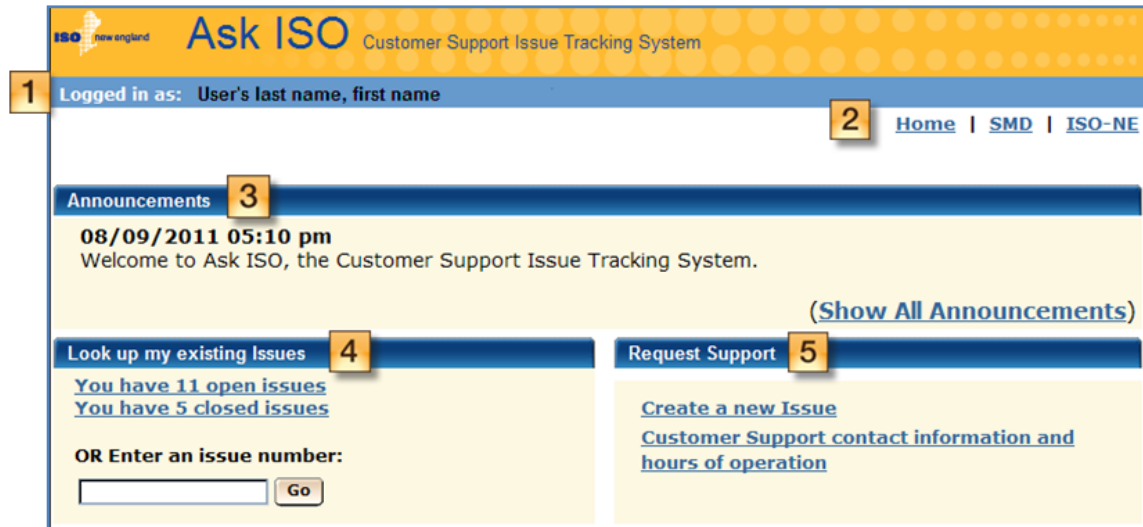
The screenshot shows the 'SMD Applications Home Page' with a navigation menu on the left and a grid of application buttons on the right. The 'Ask ISO' button is highlighted with a yellow oval and a yellow arrow pointing to it from the right.

SMD Applications Home Page	
Market System → SMD Applications Home Page	
<b>Internal Transactions</b>	<b>External Transactions</b>
<b>Bids &amp; Offers (Registered Users)</b>	<b>Customer and Asset Management System</b>
<b>Financial Transmission Rights (Registered Users)</b>	<b>Forward Reserve Market Auction</b>
<b>Submit Meter Reading</b>	<b>CROW Outage Scheduler</b>
<b>Submit Peak Contribution</b>	<b>Forward Reserve Assignment</b>
<b>Submit Network Load</b>	<b>Forward Capacity Tracking System</b>
<b>Financial Assurance Management</b>	<b>Forward Capacity Market Reconfiguration Auction</b>
<b>Forward Capacity Market CSO Bilateral Contracts</b>	<b>Supplemental Availability Designation</b>
<b>Demand Resource Market User Interface</b>	<b>DR Audit and Testing Tool</b>
<b>Ask ISO</b>	

# Ask ISO User Guide

## 3. Ask ISO home page features

By selecting the Ask ISO button on the SMD Applications Home Page, the Ask ISO home page opens with the following features:



### **1** Logged in as

Displays user's last name and first name, as registered in CAMS

### **2** Home | SMD | ISO-NE links

**Home** - Returns the user to the Ask ISO home page

**SMD** - Opens a window to the SMD Applications Home Page

**ISO-NE** - Opens a window to the ISO New England home page

### **3** Announcements

This information could include general information, upcoming outages or emergencies.

Announcements do not replace the Notices section on the ISO-NE website; however some Notices may be repeated here.

### **4** Look up my existing Issues

Offers direct links to the user's open and closed issues

### **5** Request Support links

**Create a new Issue** - Opens the template to create a new issue

**Customer Support contact information and hours of operation** - Opens to a list of methods for contacting Customer Support during normal business hours and after hours

# Ask ISO User Guide

## 4. Creating a New Issue

From the Ask ISO Home Page, select the **Create a new Issue** link to open the template.

ISO new england **Ask ISO** Customer Support Issue Tracking System

Logged in as: User's last name, first name

Home | SMD | ISO-NE

Create New Issue 764 Save Cancel Reset Attach Document

**Reported by** 6 5  
User's last name, first name

**Phone Number**

**Email Address**

**1** **Category**

**2** **Issue Summary (required)** Spelling

**3** **Issue Description (required)** Spelling

**4** **Need By Date**

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Provide the following information in the Create New Issue template:

**1 Category**

Category selection is not required. If a Category is not selected when the Issue is created, ISO-NE will make the selection based on the details provided in the Issue Description field. Category options are:

- Asset Registration & Capacity Auditing
- Critical Energy Infrastructure Information (CEII)
- General Customer Support
- Markets & Tariffs

**2 Issue Summary**

This field is required. The words provided in the Summary field will be used in email communications concerning the Issue.

**3 Issue Description**

This field is required. A detailed description of the Issue should be provided to enable ISO-NE to take correct action on the Issue.

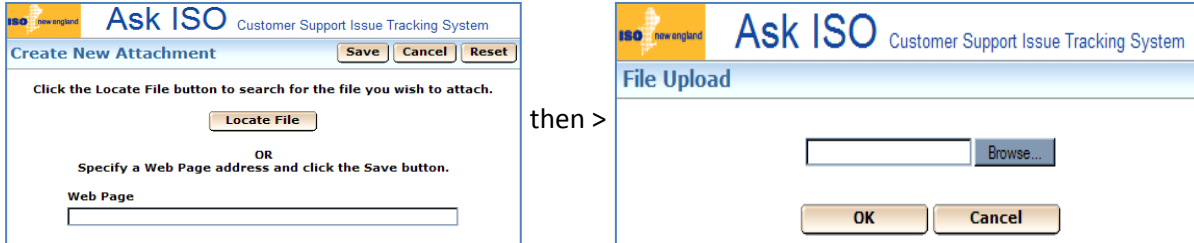
**4 Need by Date**

Provide a date if the Issue is time sensitive. This field is optional.

# Ask ISO User Guide

## 5 Attach Document

If a document should be submitted with the Issue, select the Attach Document button, then follow the prompts shown below to upload the file as an attachment.

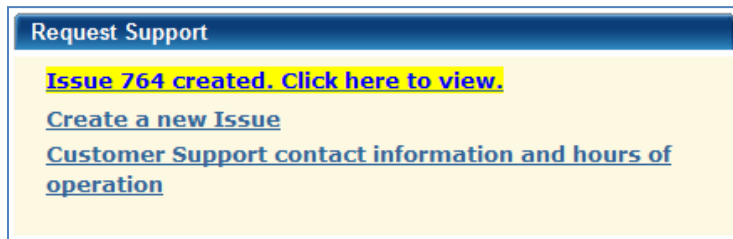


Examples of documents for upload are asset registration forms, CEII request forms, settlement reports, or screen shots for trouble shooting an error message.

## 6 Save Issue

Once all the details are entered, select **Save** button.

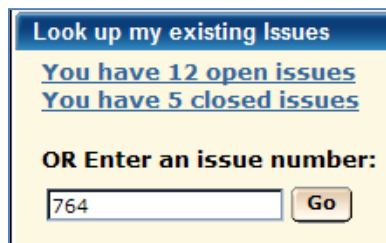
After the new Issue is saved, the screen returns to the Ask ISO home page. The new Issue with its ID number will be highlighted in the **Request Support** section as shown below:



The user will receive an automated email confirmation sent to the email address listed in the Issue. The email will include the Issue ID number and the Issue Summary for future reference.

## 5. Tracking the Issue

To track progress of the Issue, go to the Ask ISO home page. In the **Look up my existing Issues** section, select one of the following options:



- **You have ## open issues** will open a list of all your open Issues for selection.
- **You have ## closed issues** will open a list of all your closed Issues for selection.
- **OR Enter an Issue number**, select **Go** will open the specified Issue.

# Ask ISO User Guide

When a specific Issue ID number is selected, the Issue Detail page will open. All updates made to the Issue can be viewed on the Issue Detail page in the History section, as shown below.

**764 Issue Detail**

[Edit Issue](#)
[Add Comment](#)
[Attach Document](#)
[Cancel Issue](#)

Open Date/Time	Status	Need By Date	Reported By	Created By	Issue Category
08/18/2011 03:30 pm	Assigned		User's last name, first name	User's last name, first name	General Customer Support

**Issue Summary**

Text of Issue Summary provided

**Issue Description**

Text of Issue Description provided

**History**

Date	Type	Summary
08/18/2011 04:51 pm	Update Status	Status changed from 'Submitted' to 'Assigned'
08/18/2011 04:50 pm	Log Comment	We will investigate your question and let you know.
08/18/2011 03:30 pm	Initial	Contact: User's last name, first name Phone: customer's phone # Email: customer's email address

From the Issue Detail screen, the user has the option to edit, add a comment, attach document, or cancel the Issue by using the buttons in the upper right corner of the screen.

## 6. Closing the Issue

When the Issue is successfully resolved, Customer Support will change the status to 'Closed'. The Solution will be logged and visible on the Issue Detail page, as shown below.

If the Issue is not resolved to the user's satisfaction, the option to reopen the Issue is available by selecting the **Reopen Issue** button.

**764 Issue Detail**

[Home](#) | [SMD](#) | [ISO-NE](#)

[Reopen issue](#)
[Refresh](#)

Open Date/Time	Status	Need By Date	Reported By	Created By	Issue Category
08/18/2011 03:30 pm	Closed		User's last name, first name	User's last name, first name	General Customer Support

**Issue Summary**

Text of Issue Summary provided

**Issue Description**

Text of Issue Description provided

**History**

Date	Type	Summary
08/18/2011 05:04 pm	Close	Status changed from 'Resolved' to 'Closed'
08/18/2011 05:04 pm	Resolved	Status changed from 'In Progress' to 'Resolved'
08/18/2011 05:04 pm	Update Status	Status changed from 'Assigned' to 'In Progress'
08/18/2011 05:03 pm	Log Solution	The solution to your question will be provided here.
08/18/2011 04:51 pm	Update Status	Status changed from 'Submitted' to 'Assigned'
08/18/2011 04:50 pm	Log Comment	We will investigate your question and let you know.
08/18/2011 03:30 pm	Initial	Contact: User's last name, first name Phone: customer's phone # Email: customer's email address

## Ask ISO User Guide

When the Issue's status is changed to 'Closed' by Customer Support, an automated email will be sent to the user at the email address provided in the Issue. As shown in the example below, the email notification will include the Issue ID number, the Issue Summary, and the Solution logged in Ask ISO.

**From:** ISO-NE Customer Support [mailto:Do\_Not\_Reply@iso-ne.com]  
**Sent:** Thursday, August 18, 2011 5:04 PM  
**To:** Customer's Name  
**Subject:** Your Issue # 764 was Closed by ISO-NE Customer Support

Dear Customer's Name,

Issue Summary: Text of Issue Summary

Solution: The solution to your question will be provided here.

Thank you for contacting us. This is an automated message from ISO New England, Inc.

Thank you,  
ISO New England Customer Support  
Customer Support Hotline: (413) 540-4220  
E-mail: [custserv@iso-ne.com](mailto:custserv@iso-ne.com)  
Fax: (413) 535-4156