# BPP/BOLT User Guide: CRES Broker Instructions to Manage BPP Users

Ohio Choice Operations

February 2023

# Table of Contents

**BPP**

**BOLT**

# BPP Logon Page

Sign in using your Username and password. Username is email address.



**Note**: If password is expired, you will need to reset with iForgot by clicking Trouble Signing In.

If password won't work there, click Trouble Signing in to answer your registered Security Questions.

# CRES Provider Selection Page

CRES Provider Page upon logging into BPP.



CRES Provider name used during your BPP Session at that moment.

**Note**: Users with Multiple DUNS Registrations will see the name change as they change CRES Providers

CRES Provider name you are using during your BPP Session

**Note**: Users with Multiple DUNS Registrations will be able to select from the dropdown to change as needed during session

# CRES Provider Selection Page



To get back to this page during your session, Click the AEP Logo in the top left of your header.

Note: Multiple Duns users may need to during the session to switch

If you do not need to alter your CRES Provider from this page, Simply click any header to begin session or the Home Icon

# CRES Broker BPP Header

CRES Broker Managing Users is a <u>two</u> step process to gain access to BPP.

❑ Add in BPP (Approval Process)
❑ Add in BOLT (Role/Password)
**Can only create CRES USERS**

CRES Brokers will have a new Header:
**SYS ADMIN**

**Provider Users:**

Manage Users by Adding, Editing, Revoking access.

**Provider Users History:**

User History for all user access under your CRES Provider.

# Manager User Page

## MANAGE USER

CRES Provider ⓘ

ABC ENERGY

User Status ⓘ

<Select>

User ⓘ

Existing Users

**Search**

New User

**Add**

Here you can **search** the existing users associated with your CRES Provider.

Status:
- ❑  Pending
- ❑  Approved
- ❑  Rejected
- ❑  Revoked

Search existing is where you can edit and revoke users

To **ADD** a new user, Click Add Button.

Note: Multiple DUNS can change CRES in dropdown.

# ADD New Users

## ADD USER

CRES Provider ⓘ

ABC ENERGY

User ⓘ

First Name ⓘ

Last Name ⓘ

Email Address ⓘ

Comments ⓘ

**Save**

*Open Bolt Setup (Seperate Tab)*

*Bolt User Setup*

**User MUST BE EMAIL ADDRESS.**

Click Link to BOLT to perform same ADD steps.

Note: BOLT does not work in Internet Explorer.

## ADD USER

CRES Provider ⓘ

ABC ENERGY

User ⓘ

FLewis@testbpp.com

First Name ⓘ

Frank

Last Name ⓘ

Lewis

Email Address ⓘ

FLewis@testbpp.com

Comments ⓘ

Adding new user to ABC Energy

**Save**

SUCCESS or FAIL message will appear

SUCCESS: The External Provider User saved successfully.

*Open Bolt Setup (Seperate Tab)*

*Bolt User Setup*

**User field MUST BE EMAIL. Must match email address**

**All requests submitted will be Approved/Rejected by Ohio Choice Operations. Email generates.**

**Note: Multiple Duns users can change CRES Provider dropdown to add user to other CRES Duns**

# Request Emails – approval required

## OCO Review Needed

**Subject**: BPP User Approval Request for Frank Lewis and Provider ABC Energy

A BPP User Approval Request has been completed.

Please view the details and comments regarding this update, below.

- User        - FLewis@testbpp.com
- User Name        - Frank Lewis
- Provider      - ABC ENERGY
- Email Address    - FLewis@testbpp.com
- Entitlements    - CRESUser
- Comments      - Adding new user to ABC Energy
- Status        - Pending
- Update Date    - 3/16/2021 10:32:39 AM

## OCO Reviewed Status

**Subject**: BPP User Status Updated for Frank Lewis and Provider ABC ENERGY

A BPP user status and comment has recently been updated.

Please view the details and comments regarding this update, below.

- User        - FLewis@testbpp.com
- User Name        - Frank Lewis
- Provider      - ABC ENERGY
- Email Address    - FLewis@testbpp.com
- Entitlements    - CRESUser
- Comments      - Approving New BPP User
- Status        - Approved
- Update Date    - 3/16/2021 11:05:16 AM

Comments as to Status Change

Status of Request

# Search Existing Users

Back to Provider Users Header tab, search
ALL Users associated with CRES Provider

## MANAGE USER

CRES Provider ⓘ

| ABC ENERGY ▾ |

User Status ⓘ

| <Select> ▾ |

User ⓘ

| |

Existing Users

**Search**

New User

**Add**

EDIT
this
User

REVOKE
this
User

Current status
for User

| Provider Name | User | Name | Status | | |
|---|---|---|---|---|---|
| ABC ENERGY | FLewis@testbpp.com | Frank Lewis | Approved | Edit | Revoke |

# EDIT Users

**EDIT USER**

CRES Provider ⓘ

ABC ENERGY ▼

User ⓘ

FLewis@testbpp.com

First Name ⓘ

Frank

Last Name ⓘ

Lewis

Email Address ⓘ

FLewis@testbpp.com

Comments ⓘ

User Status ⓘ

Approved ▼

Save

*Open Bolt Setup (Seperate Tab)*
*Bolt User Setup*

- ❑ CRES Brokers can EDIT User's First and Last Name only
- ❑ **Note**: Multi CRES Duns User could change the CRES Provider. Moving them from one to another

- ❑ Any user update will put the user into a pending status to be reviewed by OCO

- ❑ Add **Comments** when you make updates, so that OCO can be well informed in making their decision to Approve or Reject

- ❑ *NEW*: CRES Brokers can EDIT a Revoked user to re-active their access. Review still needed.

Click Link to BOLT to perform same EDIT steps to Bolt User.

Note: BOLT does <u>not</u> work in Internet Explorer.

# Request Emails – approval required

## OCO Review Needed

**Subject**: BPP User Update Request for Frank Lewis and Provider ABC ENERGY

A BPP User Update Request has been completed.

Please view the details and comments regarding this update, below.

- User      - FLewis@testbpp.com
- User Name      - Frank Lewis
- Provider      - ABC ENERGY
- Email Address    - FLewis@testbpp.com
- Entitlements    - CRESUser
- Comments      - i'm bringing frank back
- Status      - Pending
- Update Date    - 3/16/2021 11:17:20 AM

## OCO Reviewed Status

**Subject**: BPP User Status Updated for Frank Lewis and Provider ABC ENERGY

A BPP user status and comment has recently been updated.

Please view the details and comments regarding this update, below.

- User      - FLewis@testbpp.com
- User Name      - Frank Lewis
- Provider      - ABC ENERGY
- Email Address    - FLewis@testbpp.com
- Entitlements    - CRESUser
- Comments      - approving Frank
- Status      - Approved
- Update Date    - 3/16/2021 1:53:22 PM

Comments as to Status Change

Status of Request

# Revoke Users

**REVOKE USER**

CRES Provider ⓘ

ABC ENERGY

User ⓘ

FLewis@testbpp.com

First Name ⓘ

Frank

Last Name ⓘ

Lewis

Email Address ⓘ

FLewis@testbpp.com

Revoke

Open Bolt Setup (Seperate Tab)

Bolt User Setup

Back to Provider Users Header tab, search ALL Users associated with CRES Provider

❑ CRES Brokers can Revoke Users no longer needing access to BPP for their CRES Provider.

❑ No review will be needed. The user's status will simply become *Revoked* for that corresponding CRES Provider.

❑ *NEW*: CRES Brokers can EDIT a Revoked user to re-active their access. Review still needed

Click Link to BOLT to perform same Revoke steps to Bolt User.

Note: BOLT does <u>not</u> work in Internet Explorer.

# Full User Set Up

☐ Add Users to BPP

☐ Edit Users in BPP

☐ Revoke User in BPP

☐ Approval Emails Generated

START USER SET UP IN BPP

CONTINUE USER SET UP IN BOLT

☐ Add Users to BOLT

☐ Edit Users in BOLT

☐ Revoke Users in BOLT

☐ iForgot Password Emails Generated

# User History Page

Click Provider Users History Header tab, search
ALL Users associated with CRES Provider

## USER HISTORY

CRES Provider ⓘ

ABC ENERGY

User Status ⓘ

<Select>

User ⓘ

Begin Date ⓘ

End Date ⓘ

Users

**Search**

Here you can **search** all status updates for users associated with your CRES Provider.

Status:
- ❏ Pending
- ❏ Approved
- ❏ Rejected
- ❏ Revoked

You can search by CRES Provider, status, specific user, or dates.

**Note**: Multiple DUNS can change CRES in dropdown to see others.

# User History

I searched a specific User to see all Request status history.

Will have a row for adding and updating any user requests submitted.

**USER HISTORY**

CRES Provider ⓘ
ABC ENERGY

User Status ⓘ
<Select>

User ⓘ
FLewis@testbpp.com

| Provider Name | User | Name | Role | Submitted By |
|---|---|---|---|---|
| ABC ENERGY | FLewis@testbpp.com | Frank Lewis | CRESUser | JDoe007@testbpp.com |
| ABC ENERGY | FLewis@testbpp.com | Frank Lewis | CRESUser | JDoe007@testbpp.com |

| Updated By | Update Date | Comments | Status | Action |
|---|---|---|---|---|
| JDoe007@testbpp.com | 3/16/2021 | Adding new user to ABC Energy | Pending | Add |
| s233338 | 3/16/2021 | Approving New BPP User | Approved | Update |

# Overview - BOLT
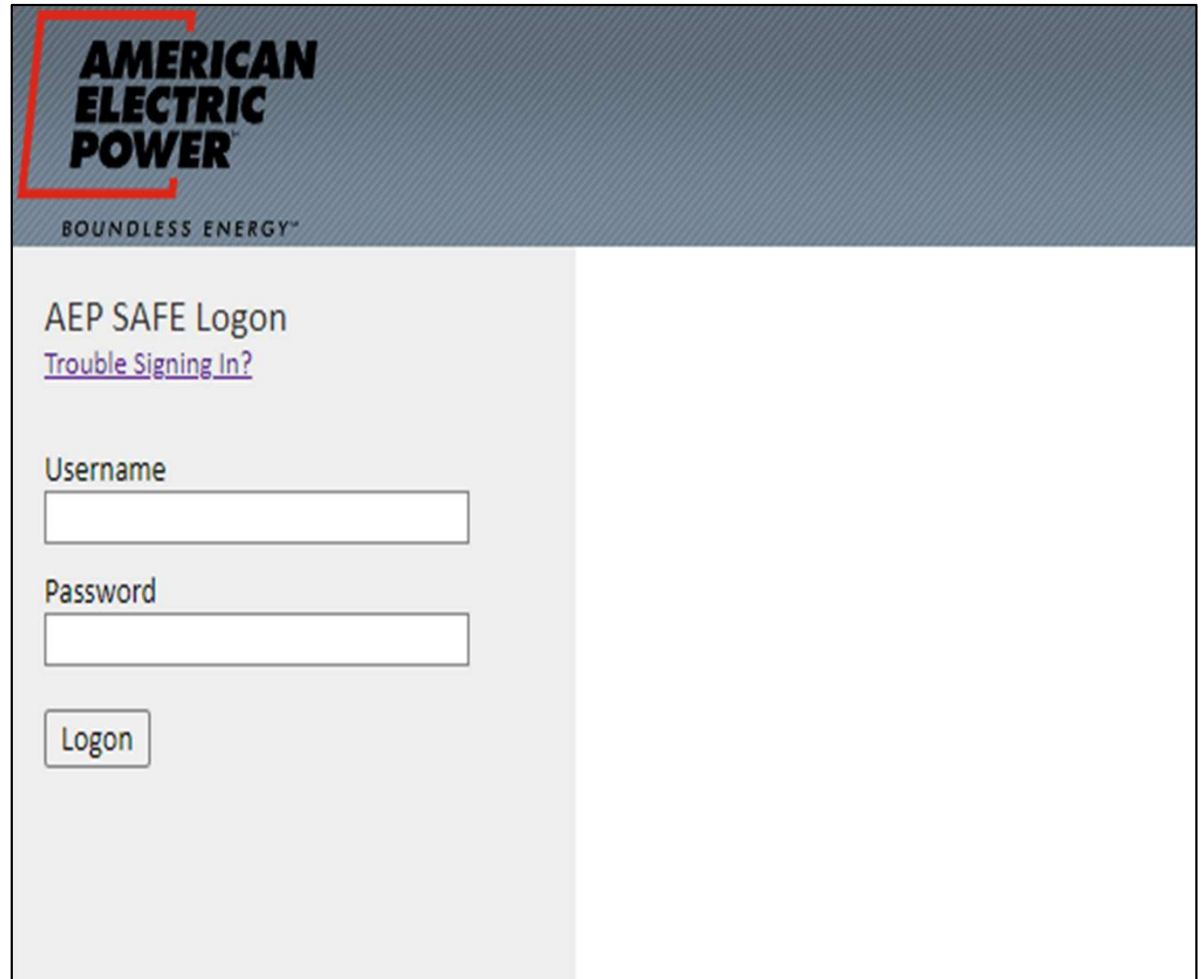
**NOTE: BOLT DOES <u>NOT</u> WORK IN INTERNET EXPLORER**

- ❑ Google Chrome
- ❑ Microsoft Edge

Same login as BPP

- ❑ Username is Email
- ❑ Password is what you established in iForgot.
- ❑ <u>Trouble Signing</u> in will take you to iForgot to reset your password.

**Note**: You previously created security questions upon registering, will aid you when your password doesn't work.

**AMERICAN ELECTRIC POWER**™

*BOUNDLESS ENERGY*™

AEP SAFE Logon

Trouble Signing In?

Username

Password

Logon

# Overview Setup – Companies

# Overview Setup – Companies



**BOLT AUTHENTICATION**

MANAGED COMPANIES

**MANAGED COMPANIES**

Search Companies

ABC ENERGY

DEF ENERGY

Users can only exist in BOLT under one Company. IF user belongs in both, you can assign that in your initial BPP Set up.

Multiple DUNs Registration Users will see each Company Separated.

# Overview Setup – Companies



Select ellipsis next to company name to launch menu
- Option to Import Users in Bulk
- Option to Refresh Company Information after updating users

# Overview Setup – Users



All existing users will be pre-loaded under their associated Company.

# Overview Setup – Group



Existing users will be added to their appropriate group (based on existing BPP Roles)

# Creating a New User Account

## Manually add Individual Users

1. Create user account (credentials)
   - ❑ Add user to BOLT

     (email address = user id)
   - ❑ System will automatically send temp password

     (to register iForgot)

2. Assign role within Business Partner Portal (BPP)
   - ❑ Add user to appropriate Group or vice versa

## Bulk Upload Users

1. Create user accounts (credentials)
   - ❑ Add users to BOLT spreadsheet

     (email address = user id)
   - ❑ System will automatically send temp password

     (to register iForgot)

2. Assign role within Business Partner Portal (BPP)
   - ❑ Add user to appropriate Group or vice versa

# New User – Manual Add

**AMERICAN ELECTRIC POWER**
BOUNDLESS ENERGY™

## BOLT AUTHENTICATION

**MANAGED COMPANIES**

### MANAGED COMPANIES

Search Companies

ABC ENERGY

### ABC ENERGY

COMPANY ID: ABCNRG_1717171717

**Employees**

#### Employee List

Search

| Email | First Name | Last Name | Actions |
|---|---|---|---|
| BSmith@testbpp.com | Bob | Smith | ⋮ |
| CJones@testbpp.com | Cathy | Jones | ⋮ |

Select + button to add a new user account

➕

5 rows   |< < 1-2 of 2 > >|

# New User – Manual Add



Add the same user information from BPP:
- Email
- First Name
- Last Name
Click **Submit** when finished

# New User – Manual Add



Success or Failed messages will appear at the top with every action.

# New User – Manual Add



All Companies are set up with a CRES User group and an Everyone group.

Note: CRES Brokers can <u>only</u> add CRES Users.

# New User – Manual Add

# New User – Manual Add



A modal will appear with all of the possible Users for your company

Select the appropriate User to add to CRES User

# New User – Manual Add

# New User – Manual Add



A modal will appear with all of the possible groups for your company

Select the CRES User

Note: All users are automatically added to the "Everyone" group.

# New User – Bulk User Upload

Bulk upload allows CRES Brokers to create accounts for multiple employees (of the same company) at once.

- File must be in CSV or Excel format (extensions .csv, .xlsx, .xls).
- Column headers must be present.
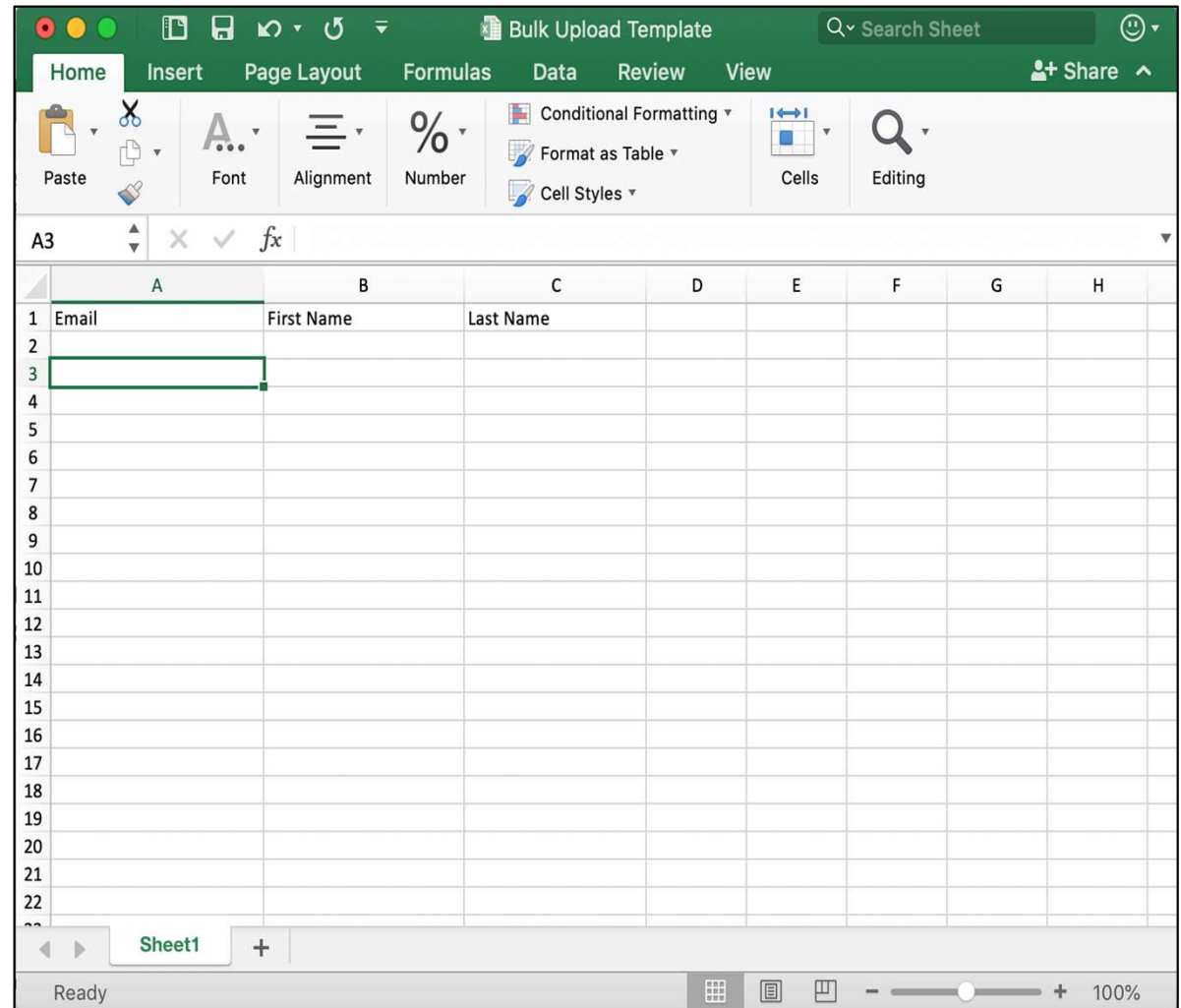
# New User – Bulk User Upload

Save completed file to your computer

# New User – Bulk User Upload

# New User – Bulk User Upload

# New User – Bulk User Upload



Your computer's file selection window will appear. Locate the file that you saved and select "Open"

# New User – Bulk User Upload

# New User – Bulk User Upload



Message confirms # of records that were successfully added

IF any records fail, the system will provide the record details. You will need to either correct the records and upload again or you will need to manually add the users.

# New User – Manual Add



Select ellipsis next to New User to launch menu Modify Group Members (add Role to User)

# New User – Bulk User Upload



A modal will appear with all of the possible Users for your company

Select the appropriate User to add to CRES User

# Edit or Delete Users

# Edit or Delete Users

**Edit User**

**Delete User**

Update Employee

Email
FLewis@testbpp.com

First Name
Frank

Last Name
Lewis

SUBMIT     CLOSE

Delete FLewis@testbpp.com?

Are you sure you want to delete this employee?

CONFIRM     CANCEL

When you complete both actions, a Green success message will appear at the top.

# Email to New Users

- When a user is added to Bolt, they will receive an email with a URL Link **(TO iForgot, NOT BPP)**
  - *One time use link
  - * Expires after 3 days, if not used

- Password expires after 90 days.
  - *No email notification sent.
  - *Notification in BPP

- You will need to inform employees that their username for is their email address.

- Users must egister with iForgot right away to avoid access issues later.

> Person who added the user to Bolt will appear in the email, for contact if needed.

## New AEP Account

An AEP enterprise user account has been created for you.

- Confirm and register your account using the button below, or copy and paste the URL into your browser.
- This link will automatically log you into iForgot. Please allow time for it to do so.
- This is a one time use link. If the registration process is stopped at anytime, please ask for a new link.

**AEP iForgot Registration**

https://iforgot.aep.com/#/?
request=FsKnuurb4nHdENZrhAQbBlKWzup026BMC4PtYQf4oWate4dNcGLoVHzuP5UCXRqev6HZGJLPfarQvUSfOai8OKulmvzCbwR3wddIxlITsd0s5q7Mu1or5g
ALKUJyp4yA03RugGKyxHst34xiKR1d-N2Scp8eSyavXh4YAoZyZfl0Gs1fkcar06oPHYksRsU8uJqmTck6-
P75ilH_eqN4x6FcintmTvIpUuqZaBzCQG6jiHbFziQJzOnK0izh-
6UNARLW5x_wZqeUGd-5umuqEzJizt6HnPiLVN1fDKSQk9hUJmjvmO2NigrBIE7wHILmnPClhVJRCvEG_AB2d_Vvuw

## FAQs:

Q: I have registered my AEP enterprise user account through iForgot, but I'm not sure how to access the AEP applications I need to do my job. What should I do?
A: Reach out to your AEP representative. They can provide URLs and instructions for downloading the appropriate AEP applications.

Q: What should I do if I have forgotten my password?
A: Your password can be managed through iForgot. Use the Trouble Signing In? option to recover a forgotten password.

Q: I tried to recover my password through the Trouble Signing In? process, but I keep falling my challenge questions. What should I do?
A: For assistance with any password issues that can't be resolved using the Trouble Signing In? process through iForgot, contact AEP Admin, AEP Admin Email. or your AEP Representative.

If you believe you have received this email in error, please notify AEP Admin, AEP Admin Email.

# iForgot Password Expiring

## BUSINESS PARTNER PORTAL

Welcome: CRES User Name (ABC Energy) AIS | Logout

CRES Provider ⓘ

ABC Energy

⚠ Current Password Expires in 7 days: 01-31-2023
To avoid issues: Please log into iForgot, AEP's Self-Service Password Reset Application, before the expiration date.

BPP notifies you of upcoming password expiration. Clicking the iForgot Link. The following screen should display:

On the screen displayed above, in the type the email address registered previously with AEP Ohio, and the current password.

As long as it is BEFORE the expiration date, you can change your password without issues.

## Self-Service Password Reset

User Id

Enter your user id

Password

********

Login

Trouble Signing In?

This system is for the use of AUTHORIZED USERS ONLY. Unauthorized users should not attempt to access this system. Individuals using this system are subject to having their activities on this system monitored and recorded by system personnel. Anyone using this system expressly consents to such monitoring and is advised that if such monitoring reveals possible evidence of criminal activity, system personnel may provide the evidence of such activity to law enforcement officials.

# iForgot Password Expired

**If you have an acct Registered and you <u>cannot</u> login, Click Trouble Signing In to answer to your Security Questions. *if you answer wrong too many times, your account will be locked.**

**If you <u>cannot</u> answer your security questions, then your iForgot account needs reset. A new email URL link will be sent to register in iForgot again.**



Self-Service Password Reset

User Id

Enter your user id

Password

Login

Trouble Signing In?

This system is for the use of AUTHORIZED USERS ONLY. Unauthorized users should not attempt to access this system. Individuals using this system are subject to having their activities on this system monitored and recorded by system personnel. Anyone using this system expressly consents to such monitoring and is advised that if such monitoring reveals possible evidence of criminal activity, system personnel may provide the evidence of such activity to law enforcement officials.

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## New AEP Account

An AEP enterprise user account has been created for you.

- Confirm and register your account using the button below, or copy and paste the URL into your browser.
- This link will automatically log you into iForgot. Please allow time for it to do so.
- This is a one time use link. If the registration process is stopped at anytime, please ask for a new link.

AEP iForgot Registration

https://iforgot.aep.com/#/?request=FsKnuurb4nH4ENZrhAQbBlKWzup026BMC4PtYQf4oWate4dNcGLoVHzuP5UCXRqev6HZGJLPfarQvUSfOai8OKulmvzCbwR3wddIx1ITsd0s5q7Mu1or5gALKU7yp4yA03RugGKyxHst34xiKR1d-N2Scp8aSysvXb4YAoZyZfl0Gs1fkccar06oPHYksRsU8uJqmTck6-P75ilH_eqN4x6FcintmTvIpUuqZaBzCQG6jiHbFziQJzOnK0izh6UNARLW5x_wZqeUGd-5unuqEzJizt6HnPiLVN1fDKSQk9bUJmjvmO2NigrBlE7wHILmnPClhVJRCvEG_AB2d_Vvuw

### FAQs:

Q: I have registered my AEP enterprise user account through iForgot, but I'm not sure how to access the AEP applications I need to do my job. What should I do?
A: Reach out to your AEP representative. They can provide URLs and instructions for downloading the appropriate AEP applications.

Q: What should I do if I have forgotten my password?
A: Your password can be managed through iForgot. Use the Trouble Signing In? option to recover a forgotten password.

Q: I tried to recover my password through the Trouble Signing In? process, but I keep failing my challenge questions. What should I do?
A: For assistance with any password issues that can't be resolved using the Trouble Signing In? process through iForgot, contact AEP Admin, AEP Admin Email. or your AEP Representative.

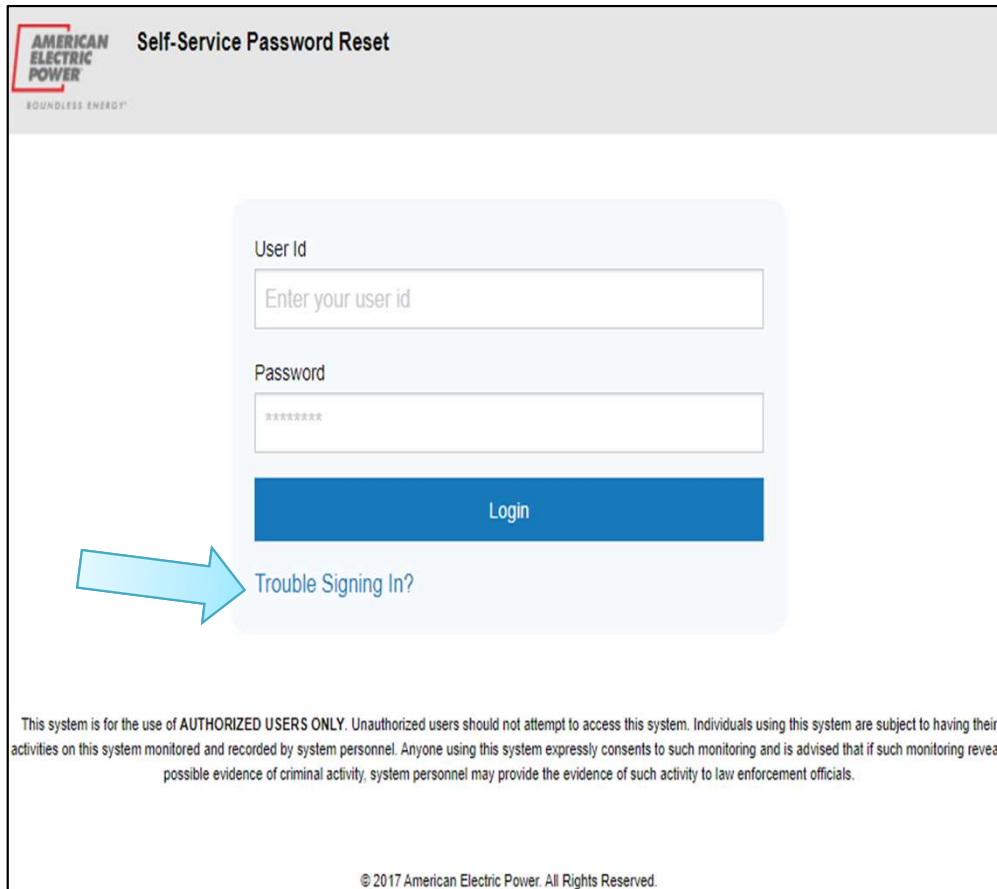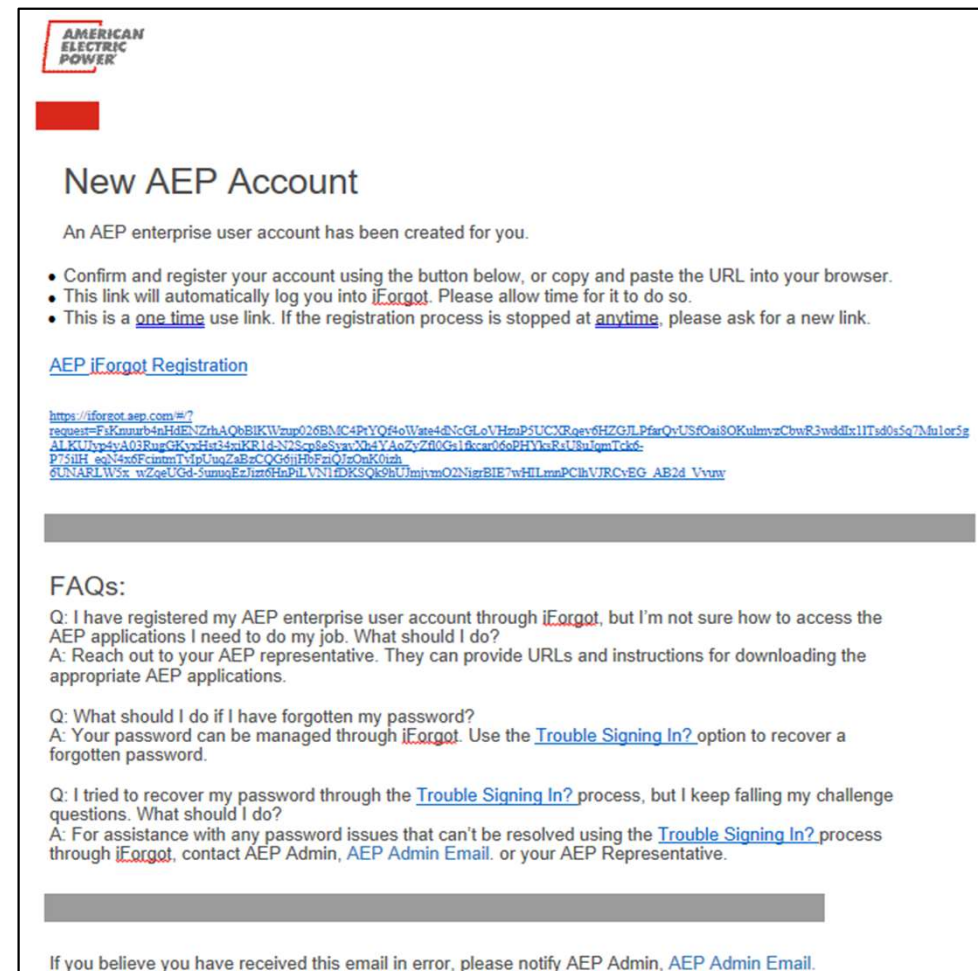If you believe you have received this email in error, please notify AEP Admin, AEP Admin Email.

# Resetting User's iForgot Account

Resetting an existing user's iForgot account can be done by CRES Broker or AEP Admin
Resetting a user's iForgot means it will wipe out their current account and all questions.
The user will need to re-enroll all new security questions/answers.

*This is AFTER the USER has found their current iForgot questions do not work*



Select the User from Employee List.
Click the three ellipses to the right.

Select Reset Account.
Confirm on Pop up, YES

# Resetting User's iForgot Account

Once a user has their iForgot Account Reset, they will receive this Email.

> Email has URL Link **(TO iForgot)**
>
> *One time use link

- Expires after 3 days, if not used

- Users MUST complete registration with iForgot entirely to avoid access issues later.

- Password expires after 90 days.
  - *No <u>email</u> notification sent.
    - *Notification in BPP



### New AEP Account

An AEP enterprise user account has been created for you.

- Confirm and register your account using the button below, or copy and paste the URL into your browser.
- This link will automatically log you into iForgot. Please allow time for it to do so.
- This is a <u>one time</u> use link. If the registration process is stopped at <u>anytime</u>, please ask for a new link.

AEP iForgot Registration

https://iforgot.aep.com/#/?request=FsKmuurb4nHdENZrhAQbBlKWzup026BMC4PtYQf4oWate4dNcGLoVHzuP5UCXRqev6HZGJLPfarQvUSfOai8OKuImvzCbwR3wddIx1ITsd0s5q7Mu1or5gALKUJyp4yA03RugGKyxHst34xiKR1d-N2Scp8eSyav.Xh4YAoZyZfl0Gs1fkcar06oPHYksRsU8uIqmTck6-P75iIH_eqN4x6FcintmTvIpUuqZaBzCQG6jiHbFziQJzOnK0izh_6UNARLW5x_wZqeUGd-5unuqEzJizt6HnPiLVN1fDKSQk9hUJmjvmO2NigrBIE7wHILmnPCIhVJRCvEG_AB2d_Vvuw

### FAQs:

Q: I have registered my AEP enterprise user account through iForgot, but I'm not sure how to access the AEP applications I need to do my job. What should I do?
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Q: I tried to recover my password through the Trouble Signing In? process, but I keep failing my challenge questions. What should I do?
A: For assistance with any password issues that can't be resolved using the Trouble Signing In? process through iForgot, contact AEP Admin, AEP Admin Email. or your AEP Representative.

If you believe you have received this email in error, please notify AEP Admin, AEP Admin Email.