

AMERICAN ELECTRIC POWER
BOUNDLESS ENERGY

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

Ohio Choice Operations
April 2021

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BPP Logon Page

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

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AEP SAFE Logon
[Trouble Signing In?](#)

Username

Password

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.

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CRES Provider Selection Page

CRES Provider Page upon logging into BPP.

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RATES ALLOTMENTS USAGE DATA/REPORTS ENROLL FROM YOUR WALLET SYS ADMIN

BUSINESS PARTNER PORTAL

Welcome Jane Doe (ABC ENERGY) Logout

CRES Provider: ABC ENERGY

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

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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

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RATES ALLOTMENTS USAGE DATA/REPORTS ENROLL FROM YOUR WALLET SYS ADMIN

BUSINESS PARTNER PORTAL

Welcome Jane Doe (ABC ENERGY) Logout

CRES PROVIDER DEFAULT SELECTION

CRES Provider: ABC ENERGY

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

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CRES Broker BPP Header

CRES Broker Managing Users is a **two** 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.



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Manager User Page

MANAGE USER

CRES Provider: ABC ENERGY

User Status: <Select>

User: [Input Field]

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.

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ADD New Users

ADD USER

CRES Provider: ABC ENERGY

User: [Input Field]

First Name: [Input Field]

Last Name: [Input Field]

Email Address: [Input Field]

Comments: [Input Field]

[Save]

Open Bolt Setup (Separate Tab)
Bolt User Setup

ADD USER

CRES Provider: ABC ENERGY

User: FLewis@testbpp.com

First Name: Frank

Last Name: Lewis

Email Address: FLewis@testbpp.com

Comments: [Input Field]

Adding new user to ABC Energy

[Save]

SUCCESS: The External Provider User saved successfully.
Open Bolt Setup (Separate 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.

SUCCESS or FAIL message will appear

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.

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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: KSelect

User: [Empty]

Existing Users Search

New User Add

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: [Empty]

User Status: Approved

Save

Open Bolt Setup (Separate Tab) Bolt User Setup

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

Note: BOLT does not work in Internet Explorer.

- ❑ 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.

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

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

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 (Separate Tab) Bolt User Setup

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

Note: BOLT does not work in Internet Explorer.

- ❑ 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

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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

- Add Users to BOLT
- Edit Users in BOLT
- Revoke Users in BOLT
- iForgot Password Emails Generated

CONTINUE USER SET UP IN BOLT

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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.

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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
a233338	3/16/2021	Approving New BPP User	Approved	Update

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Overview - BOLT

NOTE: BOLT DOES NOT WORK IN INTERNET EXPLORER

- Google Chrome
- Microsoft Edge

Same login as BPP

- Username is Email
- Password is what you established in iForgot.
- Trouble Signing 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.

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AEP SAFE Logon

[Trouble Signing in?](#)

Username: _____

Password: _____

Logon

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Overview Setup – Companies

Company/Companies CRES Broker manages

Note: Multiple CRES Registration Users will have one company for each

Registered Company Display Name
Company ID:
AEP Ohio Registration ID_CRES Duns

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Overview Setup – Companies

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.

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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

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Overview Setup – Users

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

Email	First Name	Last Name	Action
ljohn@epa.com	John	Smith	[Icon]
ljohn@epa.com	John	Smith	[Icon]

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Overview Setup – Group

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

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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

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New User – Manual Add

Select + button to add a new user account

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New User – Manual Add

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

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New User – Manual Add

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

Email	First Name	Last Name	Address
Edm@abc.com	Edm	Smith	
Cor@abc.com	Corby	James	
Frank@abc.com	Frank	Leach	

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New User – Manual Add

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

Note: CRES Brokers can only add CRES Users.

Name	Description	Address
CRES User	User of BPP Application	
Everyone		

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New User – Manual Add

Select ellipsis next to CRES User to launch menu Modify Group Members (add Users to their group)

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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

Email	First Name	Last Name
<input checked="" type="checkbox"/>	Edm	Smith
<input type="checkbox"/>	Corby	James

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New User – Manual Add

MANAGED COMPANIES

ABC ENERGY
COMPANY ID: ABCENR11701717

Employees

Email	First Name	Last Name	Address
Edwin@abc.com	Edw	Smith	
Edwin@abc.com	John	Smith	
Edwin@abc.com	John	Smith	

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

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New User – Manual Add

MANAGED COMPANIES

ABC ENERGY

Add/Remove Group Members

Groups

- CRES User
- Everyone

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.

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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.

1	Email	First Name	Last Name
2			
3			
4			
5			
6			
7			
8			
9			
10			
11			
12			
13			
14			
15			
16			
17			
18			
19			
20			
21			
22			

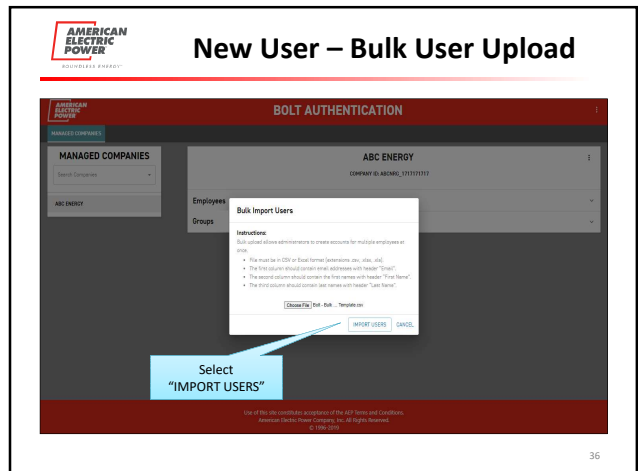
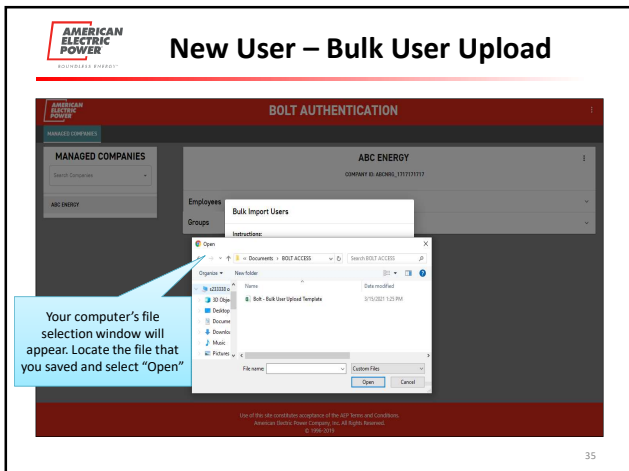
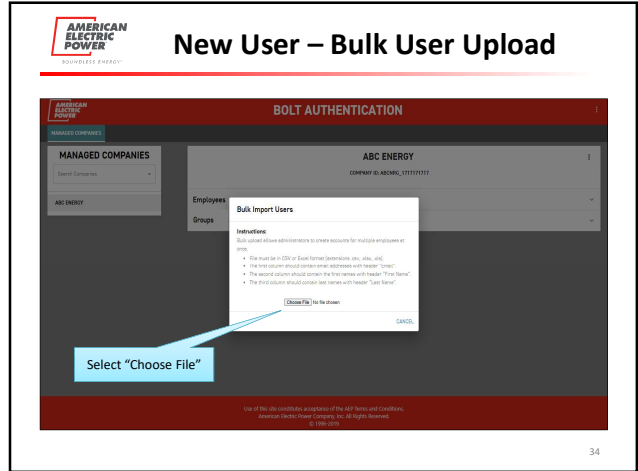
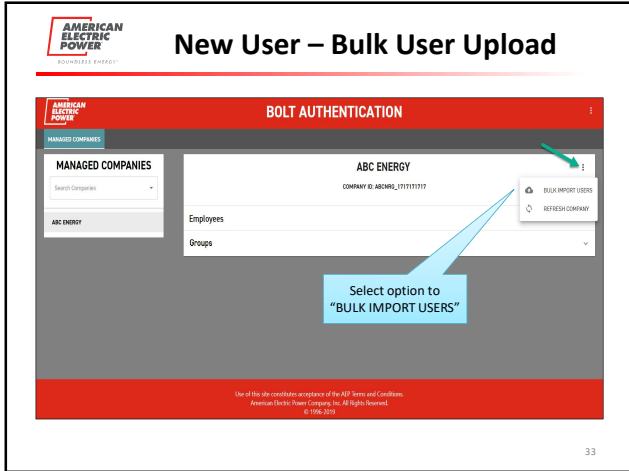
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New User – Bulk User Upload

Save completed file to your computer

1	Email	First Name	Last Name
2	lemons@test.com	Sam	Jones
3	persters@test.com	Pete	Townsend
4	johnard@test.com	John	Dunlop
5	johnard@test.com	John	Marble
6			
7			
8			
9			
10			
11			
12			
13			
14			
15			
16			
17			
18			
19			
20			

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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.

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New User – Manual Add

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

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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

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Edit or Delete Users

Select ellipsis next to User to launch menu: Here you can Edit First/Last Name. Or Delete the User

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Edit or Delete Users

Edit User

Update Employee

Email:

First Name:

Last Name:

[SUBMIT](#) [CLOSE](#)

Delete User

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.

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SOUTHWEST ENERGY

Email to New Users

- When a user is added to Bolt, they will receive an email with a temporary password (TO iForgot, NOT BPP)
- Password expires after 90 days. ***No email notification sent.**
- You will need to inform employees that their username for is their email address.
- Encourage users to register with iForgot right away and in its **entirety** to avoid access issues.

New AEP Account

An AEP enterprise user account has been created for you. Go to [iForgot](#) to accept your enterprise account invitation and create a permanent password.

AEP iForgot Identity Solution Application: <https://iforgot.aep.com>

Temporary iForgot Password: **USU673&vo**

Once your account has been registered with [iForgot](#), contact your direct manager for instructions for accessing your AEP applications.

iForgot Troubleshooting Tips:

Initial Registration:

- If you do not know your user name, contact your direct manager.
- If you are unable to log into iForgot with your temporary password, contact Jane Doe, jdoe@aep.com or your primary AEP contact for assistance.

Password Management:

- You **MUST** register your account with [iForgot](#) before you can reset your password.
- If you have forgotten your password, use the "Trouble Signing In?" option in iForgot.
- If you have forgotten the answers to your challenge questions, contact Jane Doe, jdoe@aep.com or your primary AEP contact for further assistance.

If you believe you have received this email in error, please notify Jane Doe jdoe@aep.com.

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

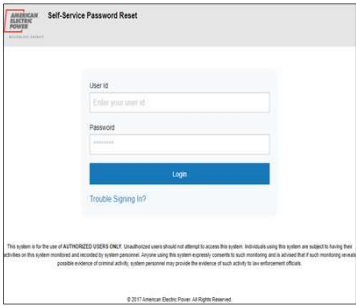
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SOUTHWEST ENERGY

iForgot Process

Click this link: iforgot.aep.com or type the URL in your Internet Browser.

The following screen should display:



On the screen displayed above, in the "User ID" field type the email address registered previously with AEP Ohio, and the following Temporary Password:

If you have an acct Registered and you cannot login, Click [Trouble Signing In](#) to get to your Security Questions.

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