BPP/OKTA Guide: External Administrator

User Management for Business Partner Portal

Table of Contents

1.0 Overview 2

2.0 Audience 2

3.0 Guide 2

Add User 2

Remove User 8

Reset User 10

Password 10

Multi Factor Authentication (MFA) 11

Edit User 13

BPP User History 14

4.0 FAQ 15

1.0 Overview

Secure Partner Access manages users across the BPP application.

- BPP: bpp.aep.com
- OKTA: https://aep-production.okta.com/partner-portal

2.0 Audience

External CRES Administrators – Primary users who manage BPP users

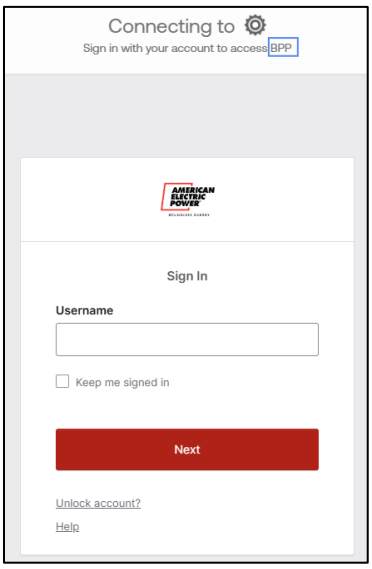
3.0 Guide

External CRES Administrators will need to manage their users in both BPP and OKTA. If you manage multiple companies, you will assign the multiple access within BPP Application.

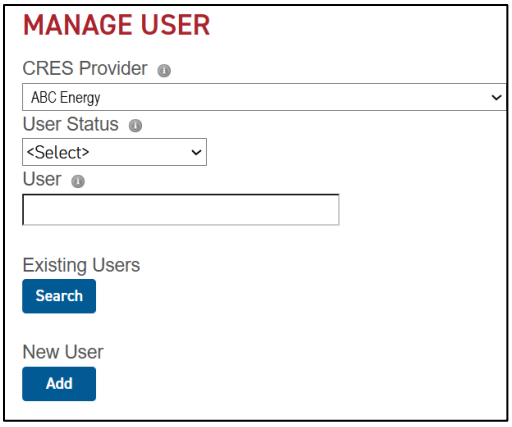
Add User

External CRES Admin will begin managing users within **BPP**. After user is added to BPP, and awaits approval, External CRES Admin will need to go to **OKTA** to finish set up.

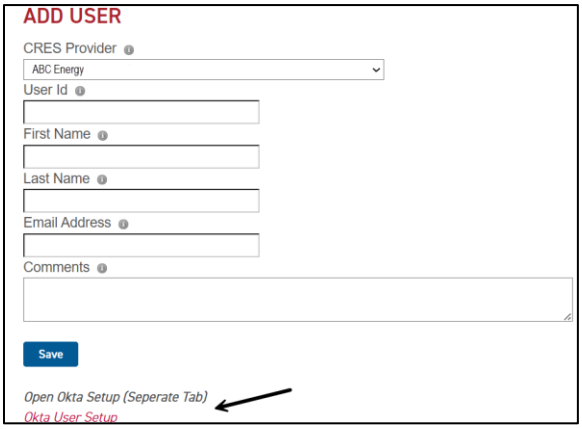
1. Business Partner Portal (BPP)
    a. bpp.aep.com



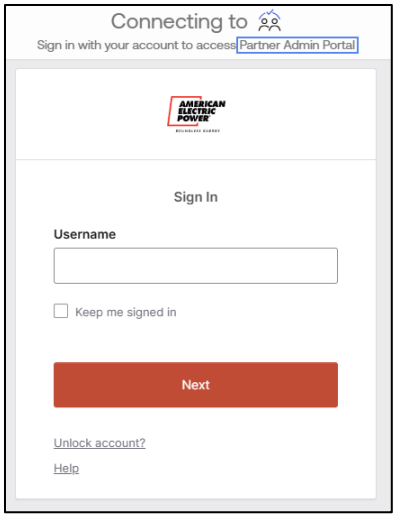
2. **SYS ADMIN**→ Provider Users
    a. If not already appearing, choose your specific company



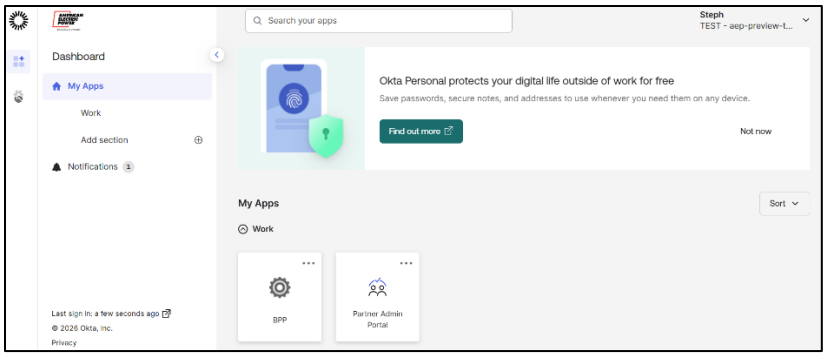
3. Click **Add**
4. Fill out the user information. User id is the same as Email address. If CRES Provider is not correct at the top, use drop down to select correct one. Click Save.
    a. Success or Fail message will appear.
    b. **NOTE**: if you have multiple duns you manage and are adding the *same* user to more than one, you can select the drop down to change the CRES and save. All the user information will stay after you save.
    c. **Request email will be sent to Ohio Choice Operations for review**. Once reviewed, email will be sent back to requestor with user status and notes.



5. Upon Success, use **OKTA** Link to navigate to Okta to finish user set up.
    a. **NOTE**: Ohio Choice Operations is still reviewing your request currently.
6. Secure partner access link for External Admins
    a. https://aep-production.okta.com/partner-portal



7. Once your Okta account has been set up, External CRES Admin lands on splash screen.



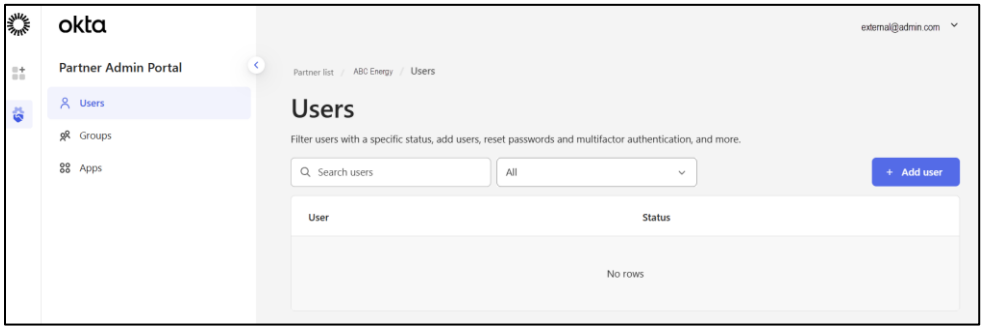
8. External CRES Admin will select their app, **Partner Admin Portal**. This will navigate to your Partner List (Company or Companies to manage)



Or



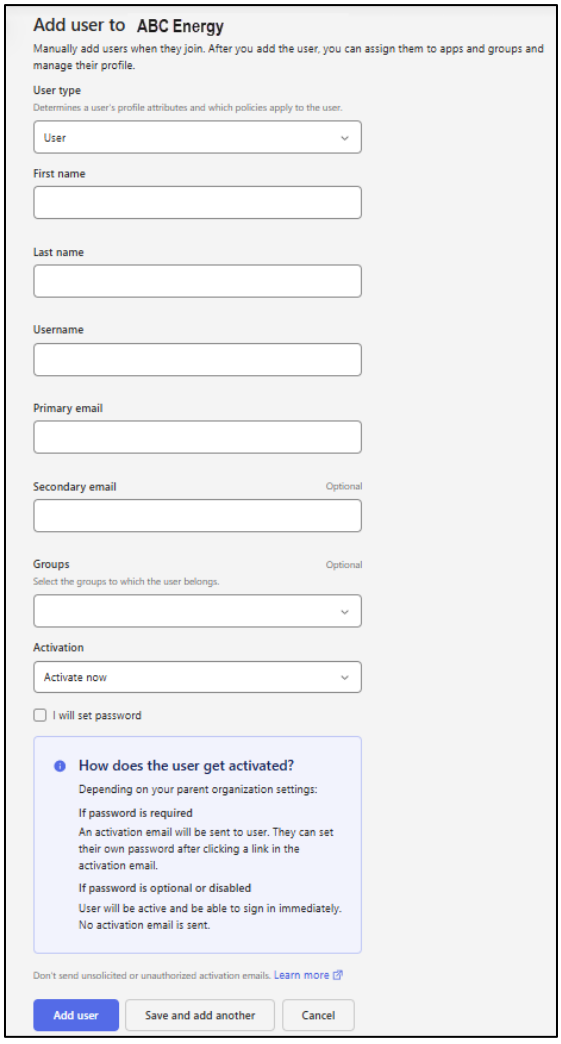
9. Select the company to which you would like to add a user.
10. Select **add user**



11. Enter the required information:

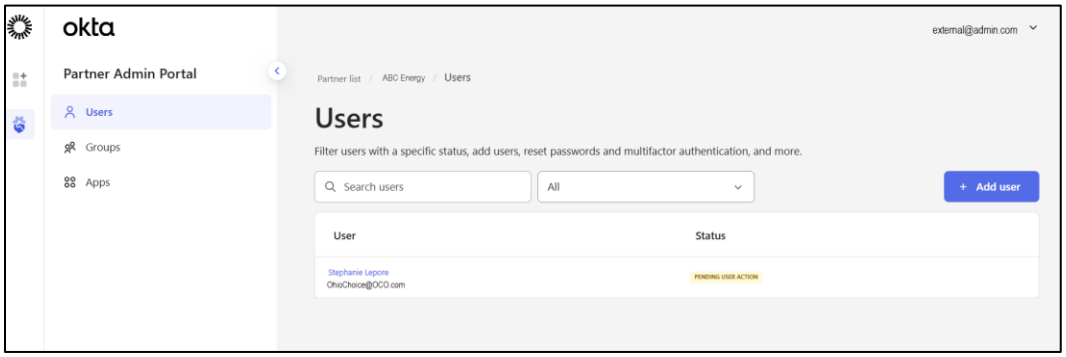
    First name, Last name, username (must be email address)

    Groups – ‘ ***OKTA BPP External Users*** ’ (this is what gives your user access)

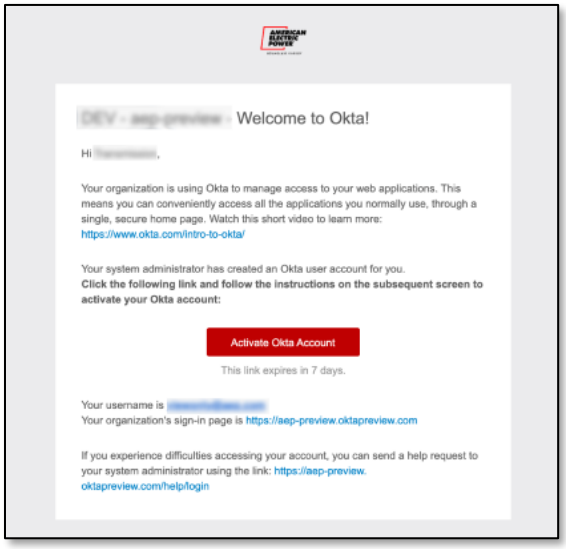


12. Add User

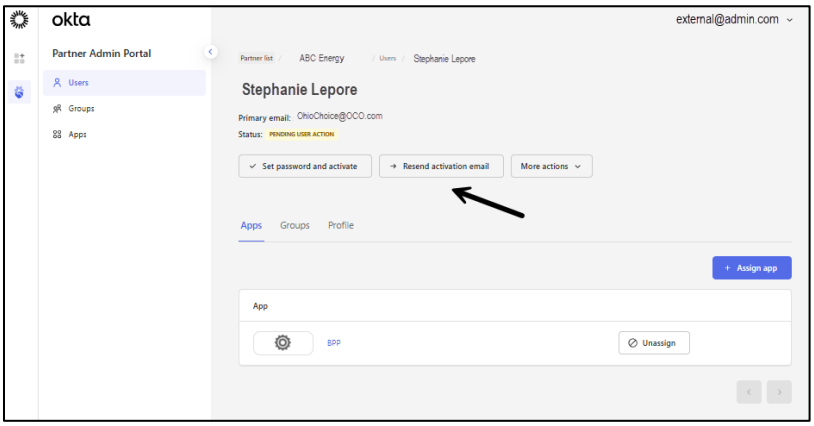
13. User will show new status as "*pending user action*"



14. The new user will receive an email from Okta after the user creation -This is an example of the new user email

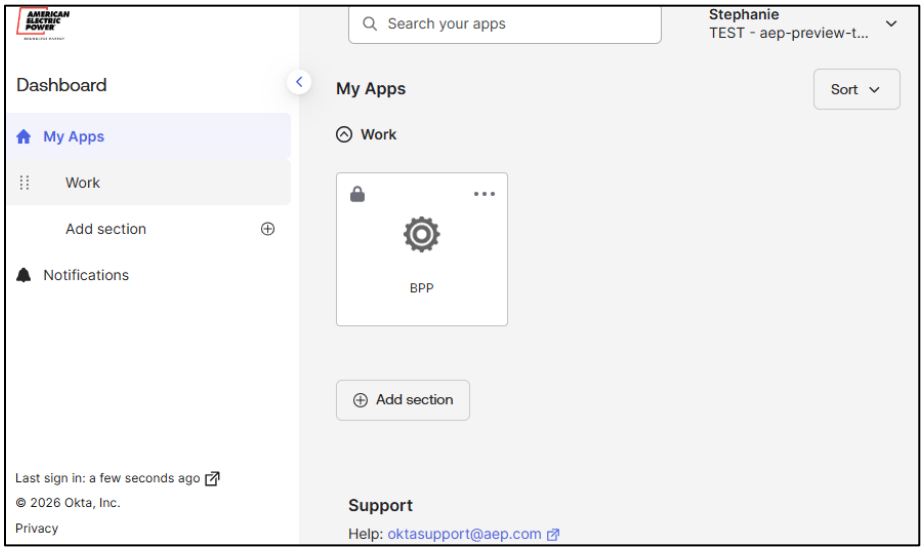


a. **NOTE**: If user does not receive email, or it expires before they are able to activate, you can resend the activation email.

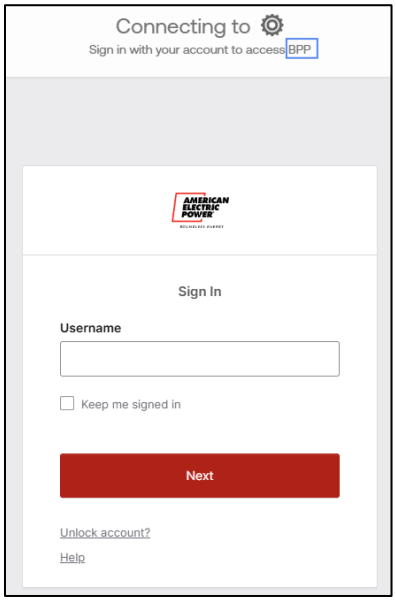


New external CRES User Splash Screen

1. After activating OKTA account, CRES User will sign in with the email provided and land on this screen on their initial log in.
2. CRES Users will proceed to click the BPP Application, to navigate to BPP.



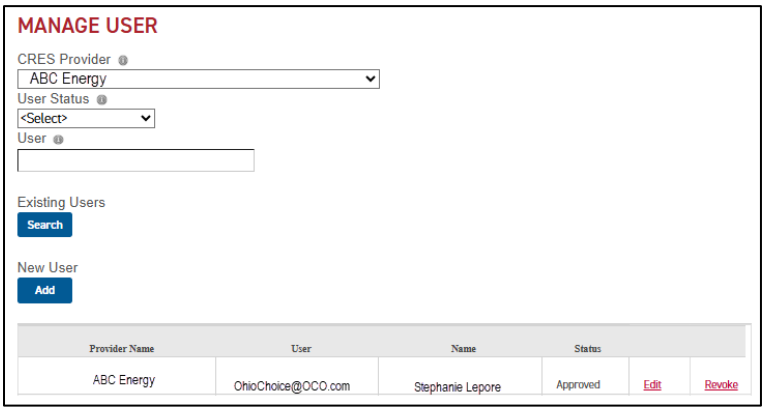
3. After initial logging into OKTA after activation, User will not need to return to Okta. All CRES Users can use the BPP URL, bpp.aep.com
4. New **BPP** Log on Page



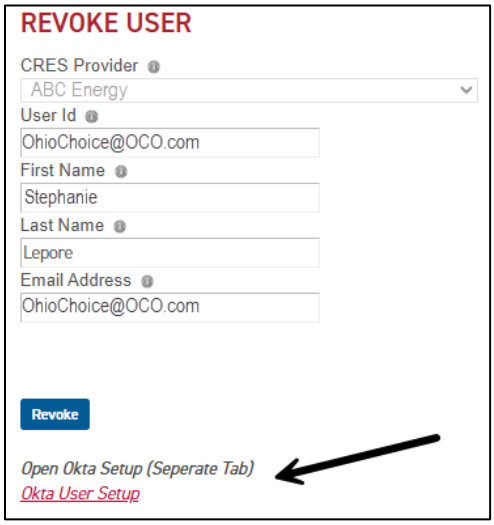
Remove User

External CRES Admin will perform actions in both BPP and OKTA. You will search for your user that no longer needs access. In BPP you will Revoke the user. Then go into OKTA and deactivate user, then delete user.

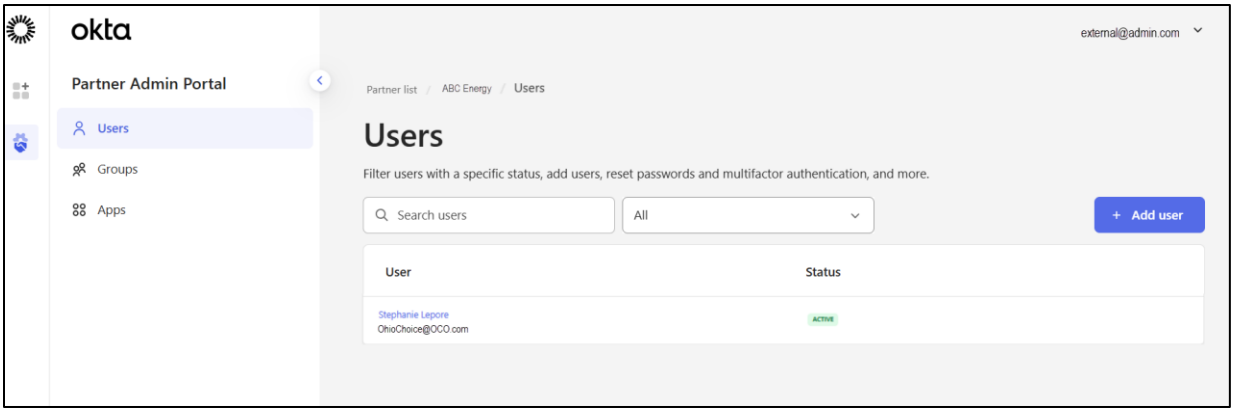
1. In **BPP**: **SYS ADMIN**→ Provider Users
2. Search users for your CRES. When row populates, click the link Revoke for your selected user to revoke.



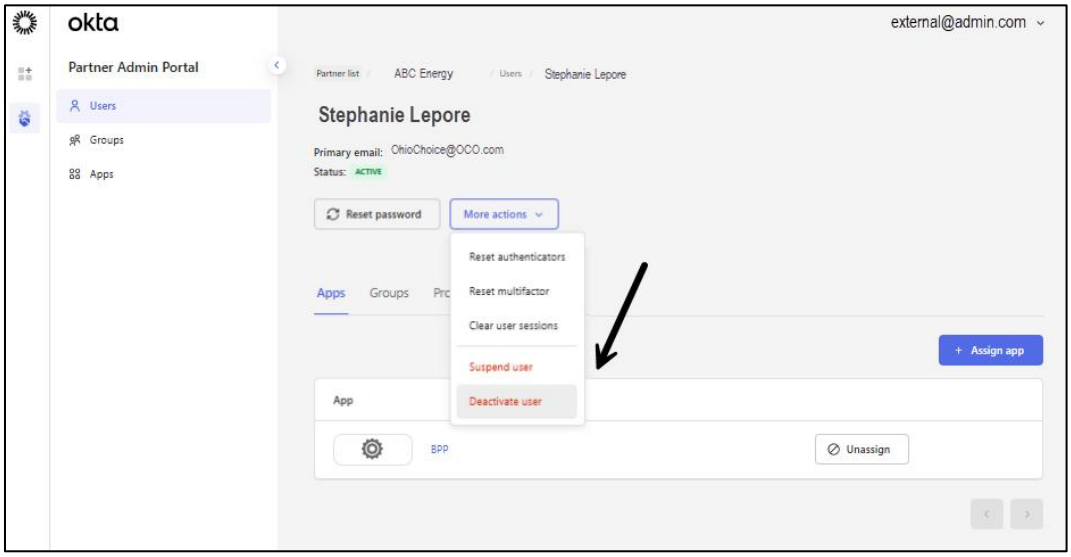
3. Revoke user screen will appear. Double check it is the correct user account.
4. Click **Revoke**. Success or Fail message will appear.

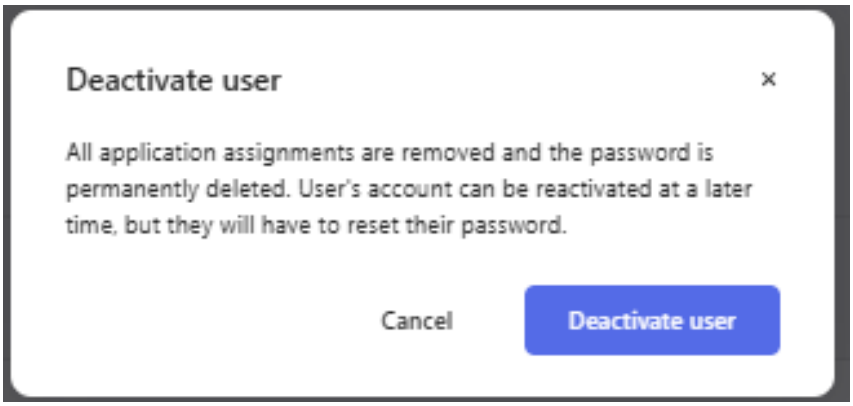


5. Upon Success, use **OKTA** Link to navigate to Okta to finish user removal.
6. In **OKTA**: Select the specific CRES list your user is under.
7. Search by name or email for the selected user you want to delete.

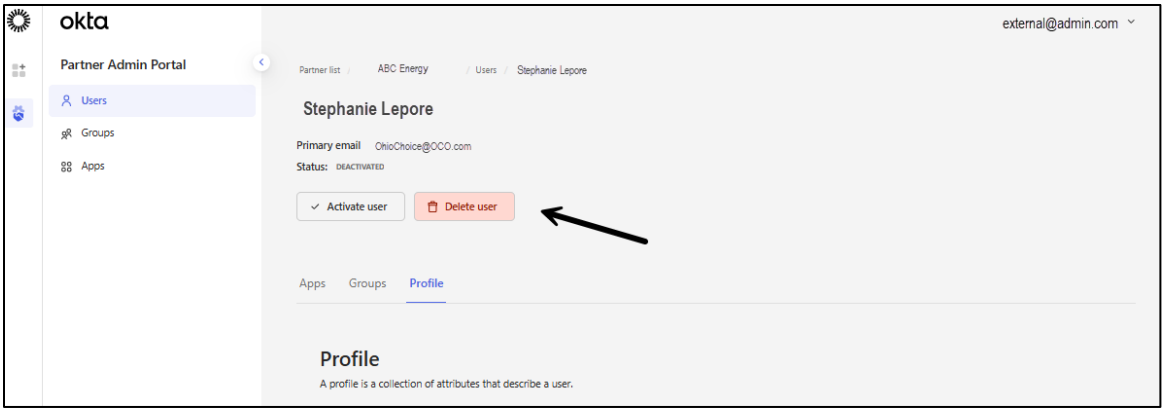


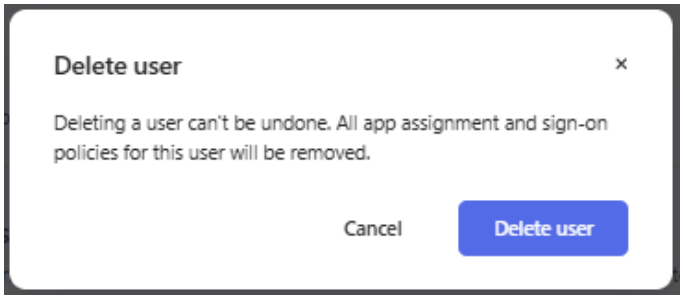
8. Enter the user profile by clicking their name.
9. Under the More Actions tab, select Deactivate User.





10. Delete user option now appears. Select. User will be deleted from OKTA.





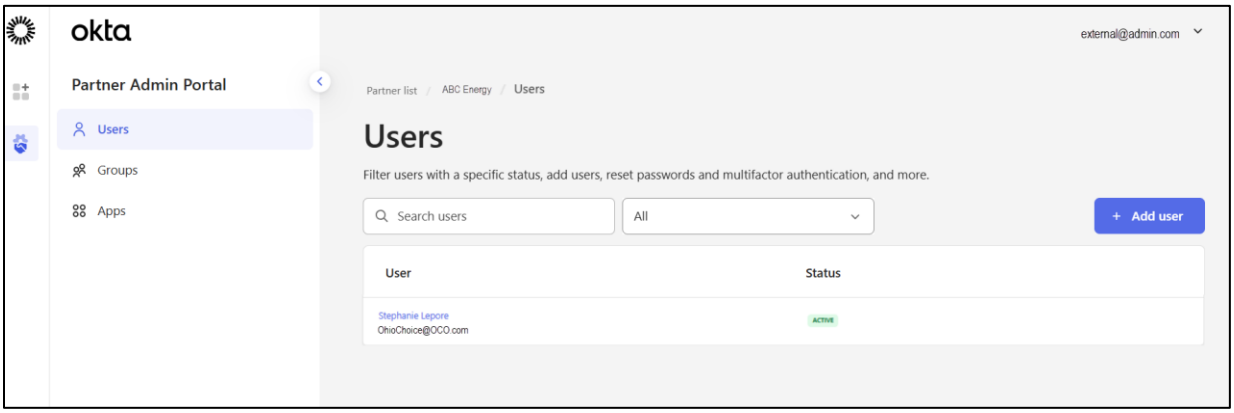
Reset User

External CRES Admin will perform actions in OKTA. You will search for the user who needs a part of their OKTA account reset.

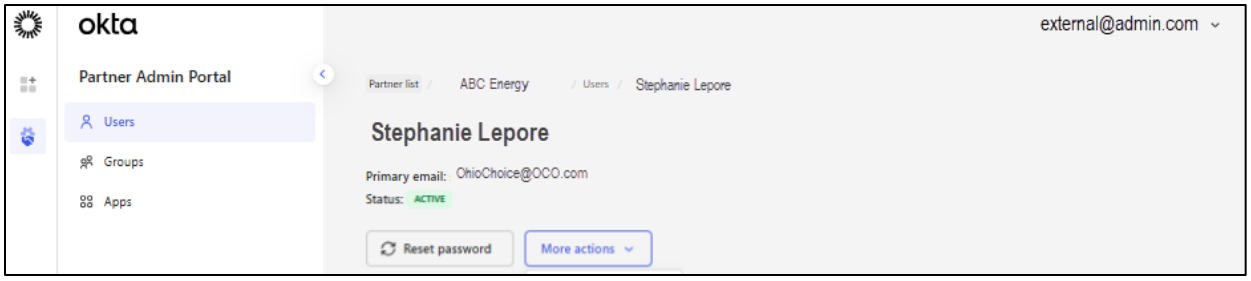
Password

For a user who is struggling with their existing password and is unable to reset themselves, External CRES Admin can request to reset their password.

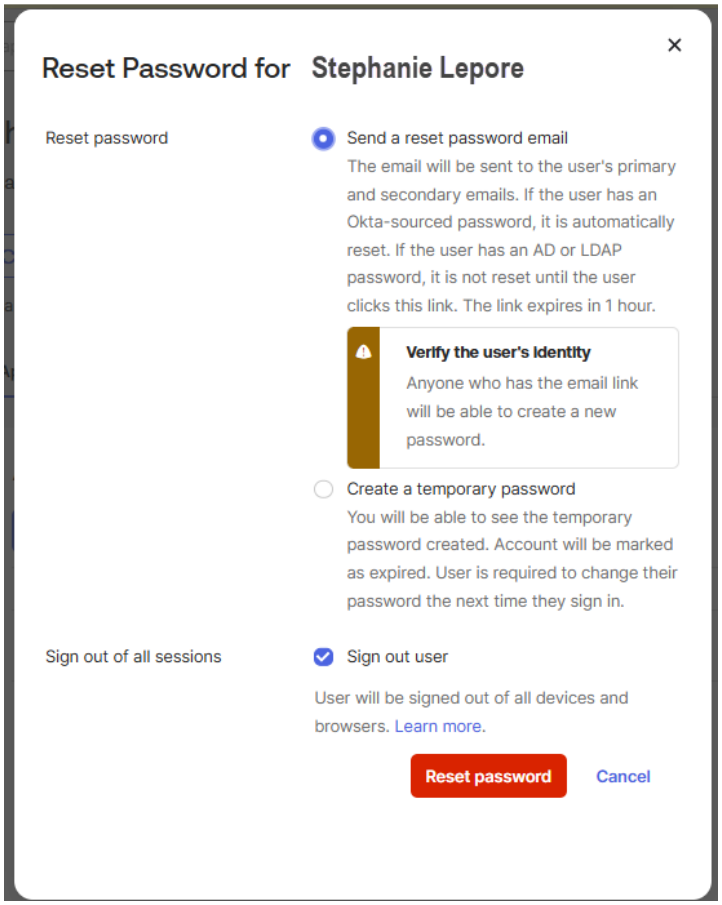
1. In **OKTA**: Select the specific CRES list your user is under.
2. Search by name or email for the selected user you want to reset.



3. Enter the user profile by clicking their name.



You can reset the password or create a one-time use temporary password. User will be prompted to create a new password in both option.

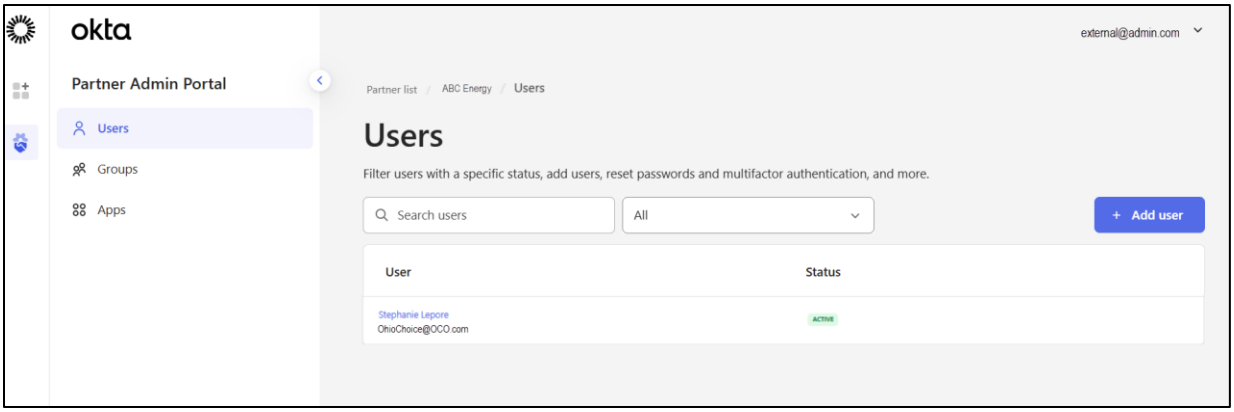


User status becomes Password Reset: Password reset. User is now in one-time password mode.

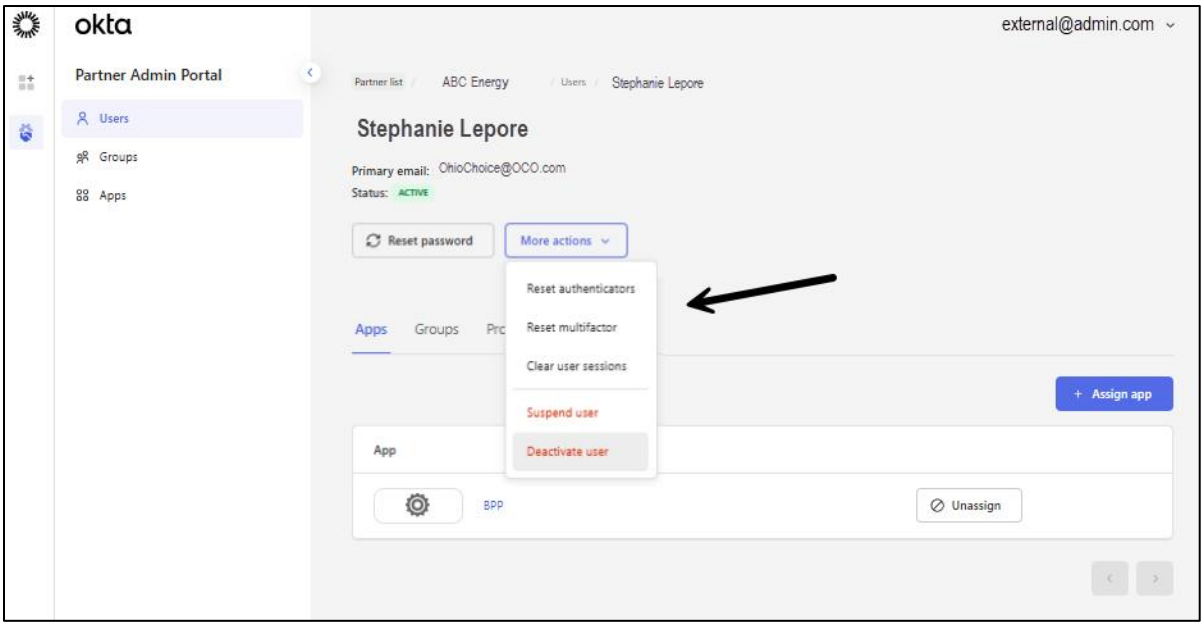
Multi Factor Authentication (MFA)

For a user who is struggling with their existing MFA or has a new personal cellular device, Admins can request to reset their MFA.

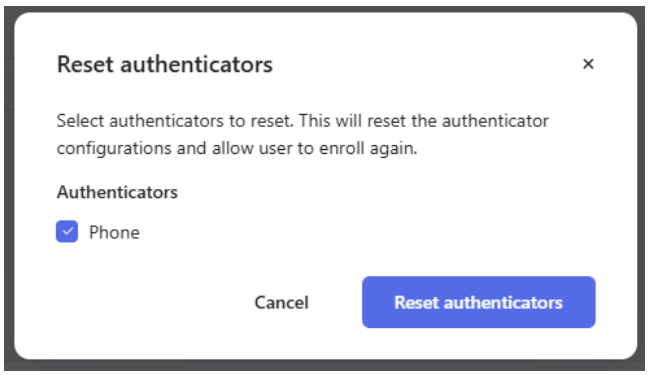
1. In **OKTA**: Select the specific CRES list your user is under.
2. Search by name or email for the selected user you want to reset.

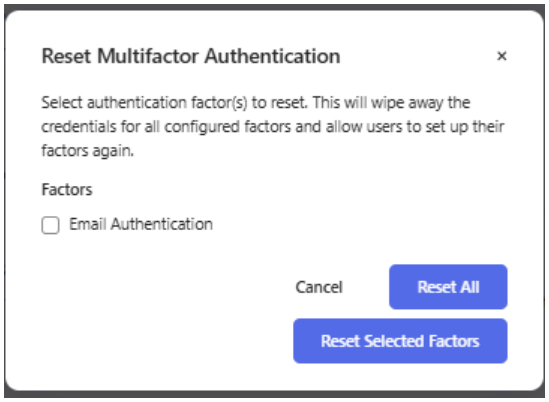


3. Enter the user profile by clicking their name.
4. Click on More Actions. Two reset options.



a. **authenticators -** does not delete just allows a relog in- clears the session
b. **multifactor** - deletes and allows users to add new devices or their device has been upgraded lost or stolen



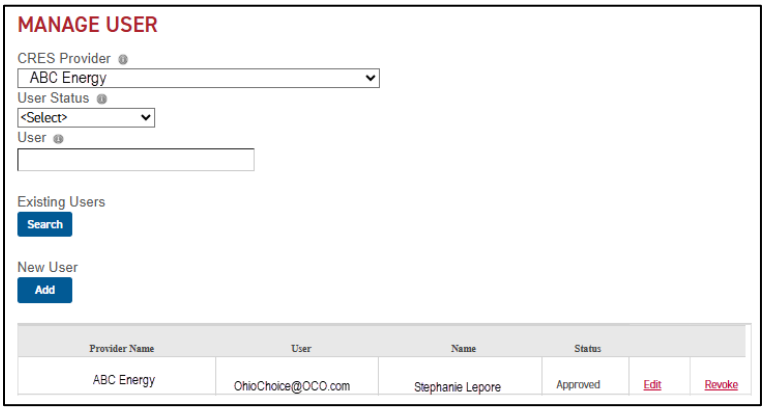


Edit User

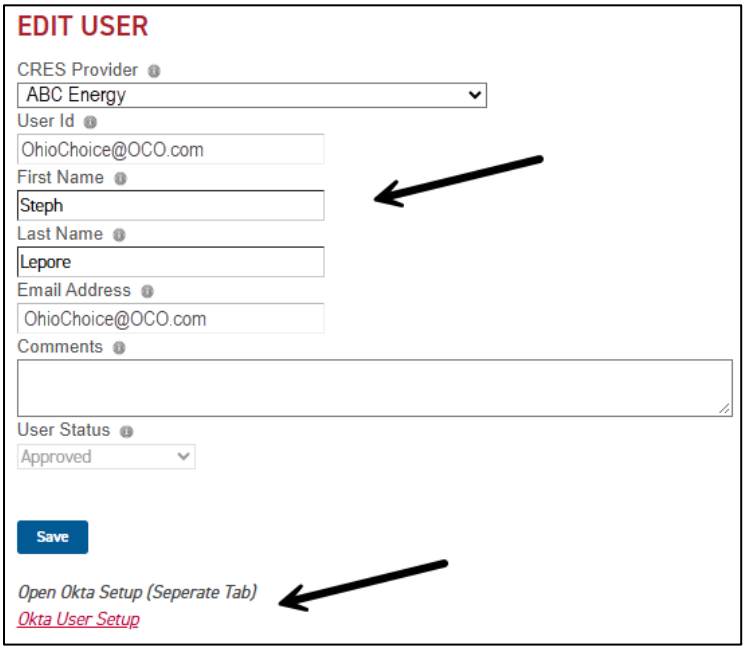
External CRES Admin will perform actions in both BPP and OKTA. You will search for your user to update. In BPP you can edit the first and last name, but not the email/username. Then go into OKTA and make the same updates.

Note: With multiple duns to manage, you can change the CRES Provider for a user.

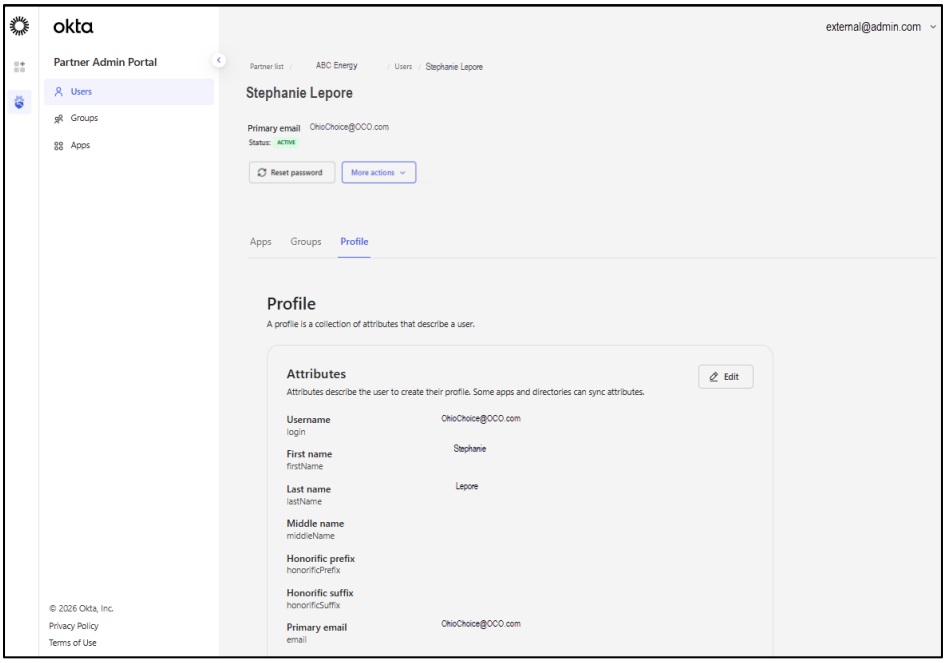
1. In **BPP**: **SYS ADMIN**→ Provider Users
2. Search users for your CRES. When row populates, click the link Edit for your selected user to edit.



3. Edit user screen will appear. Double check it is the correct user account.
4. Make updates to user First or last name. Click **Save**. Success or Fail message will appear.

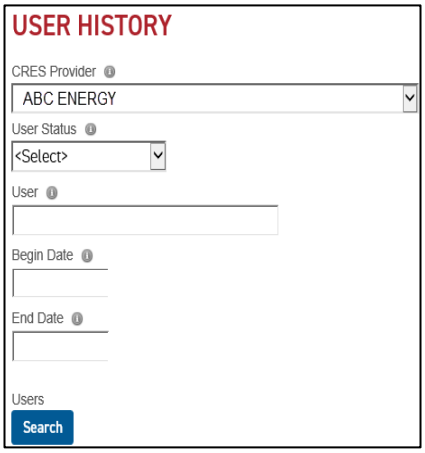


5. User status will become *Pending*. Request email will be sent to Ohio Choice Operations for review. Once reviewed, email will be sent back to requestor with user status and notes.
6. Upon Success, use **OKTA** Link to navigate to Okta to finish user removal.
7. In **OKTA**: Select the specific CRES list your user is under.
8. Search by name or email for the selected user you want to edit.
9. Click on Profile and use the pencil icon to edit user's information. **SAVE**.



BPP User History

External CRES Admin will have the ability to view the history of users in their company or companies. You can search by a specific user, status, dates, or just the company.





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

4.0 FAQ

Q1: Who can create an MFA external user in OKTA?

Only administrators with appropriate permissions can create or manage delegated access in OKTA.

Q2: What is an MFA external user used for?

MFA external users allow someone to log in without being an employee but must verify their identity using multi factor authentication to access your system

Q3: How do I verify a user was added correctly?

Verify the users appears in the directory and has the correct group assignments.

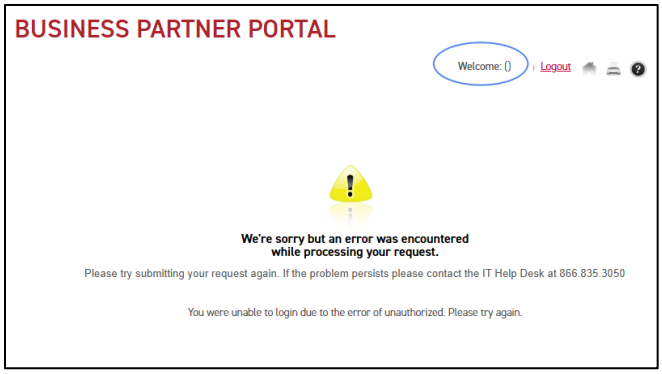
Q4: Can a deactivated user be reactivated?

Yes. Deactivated users can be reactivated unless permanently deleted.

Q5: What happens when a user is deleted?

Deleted users lose access to OKTA and connected applications.

Q6: What does the following error when accessing BPP mean?



User was not given the correct BPP Group (OKTA BPP External User) group when created in OKTA.