BOLT/BPP Webinar

Welcome!

☐ Join through Webex to see! If you have trouble with your computer audio, you can call the Webex line for audio.
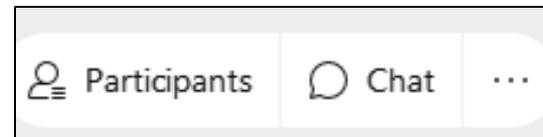
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☐ Please mute when not talking

☐ We <u>encourage</u> questions and comments

☐ Use chat function or unmute

BPP/BOLT User Guide to Manage BPP Users

BPP/BOLT Webinar
Ohio Choice Operations
March 17th, 2021

Table of Contents

- ❑ What is changing for CRES (XAM) Brokers?
- ❑ New BPP CRES Broker ability (SYS Admin)
  - ❑ Provider User Set up
  - ❑ Provider User History
- ❑ Overview BOLT Company Set Up
  - ❑ Managing Users and Role
    - ❑ Manual adds
    - ❑ Bulk upload
    - ❑ Edit and Delete Users
- ❑ Password Management (iForgot)

Bye Bye XAM

❑ XAM will be replaced by BOLT as our system for Authorizing and Authenticating users.

❑ Current XAM Brokers → CRES Brokers

❑ CRES Brokers can only add CRES Users.

❑ Functionality of XAM has been split between BPP and BOLT
   ❑ Request History – BPP
   ❑ Managing Users – BPP and BOLT
   ❑ Request Email Review and Approval – BPP
   ❑ Password Email Set Up and Reset – BOLT

New BPP Logon Page

Existing Users will user same credentials to login as now.
All Users will experience this Change.**
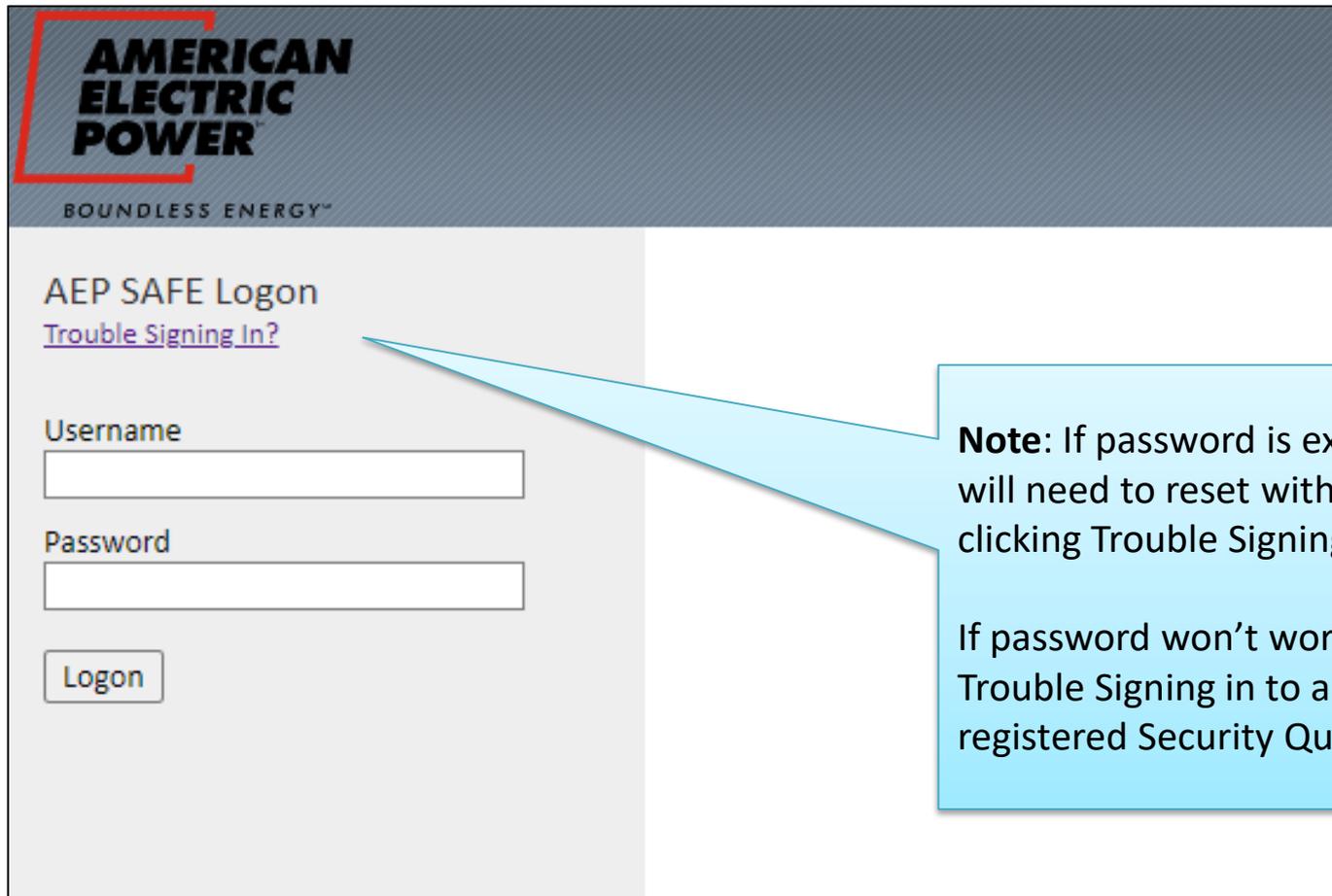
AEP SAFE Logon
Trouble Signing In?

Username

Password

Logon

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.

New CRES Provider Default Page

New Default Page upon logging into BPP.
All Users will experience this Change.**

BUSINESS PARTNER PORTAL

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

Welcome: Jane Doe (ABC ENERGY)   Logout

CRES PROVIDER DEFAULT SELECTION

CRES Provider ⓘ

ABC ENERGY

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 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

New CRES Provider Default 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

New CRES Broker BPP Header

CRES Broker Managing Users is now 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.

New 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

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

Username 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

New User Request Emails

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 ℹ️
ABC ENERGY

User Status ℹ️
<Select>

User ℹ️

Existing Users
Search

EDIT this User

REVOKE this User

New User
Add

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.

Update User Request Emails

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

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❑ 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

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.
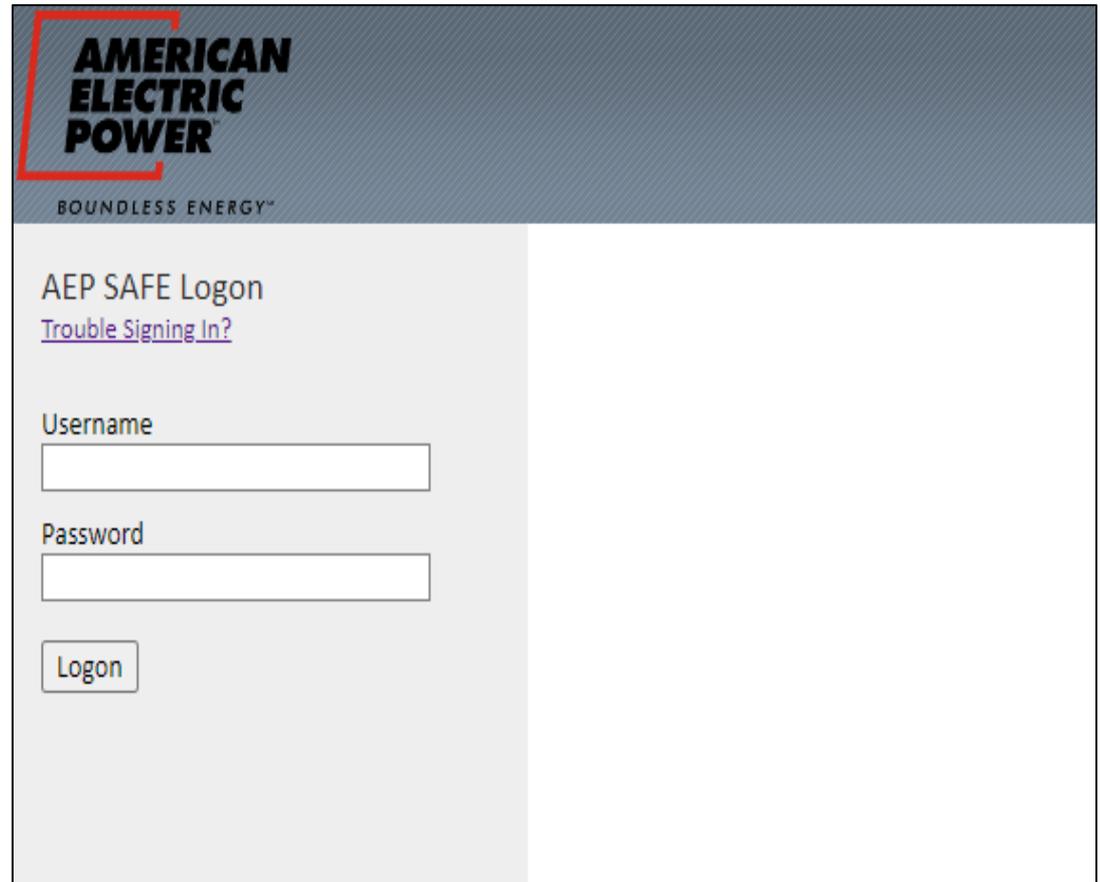
AMERICAN ELECTRIC POWER®

BOUNDLESS ENERGY™

AEP SAFE Logon
<u>Trouble Signing In?</u>

Username

Password

Logon

Overview Setup – Companies

BOLT AUTHENTICATION

MANAGED COMPANIES

MANAGED COMPANIES

Search Companies

ABC ENERGY

ABC ENERGY

COMPANY ID: ABCNRG_1717171717

Employees

Authorities

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

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

Overview Setup – Users

Overview Setup – Authorities (Role)

Existing users will be added to their appropriate authority (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 Authority Group or visa 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 Authority Group or visa versa

New User – Manual Add

New User – Manual Add

Add the same user information from BPP:
- Email
- First Name
- Last Name

Click **Submit** when finished

New User – Manual Add

New User – Manual Add

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

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.
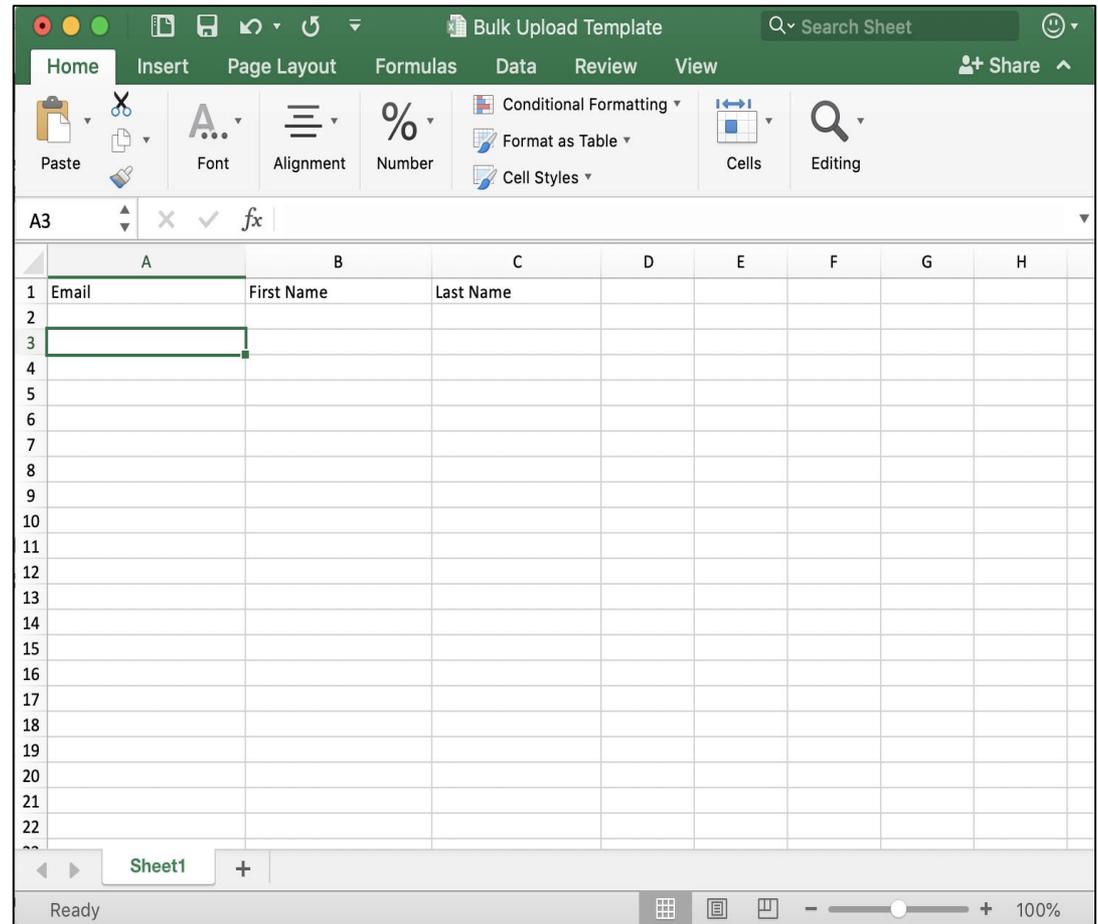
New User – Bulk User Upload

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 – Bulk User Upload

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

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
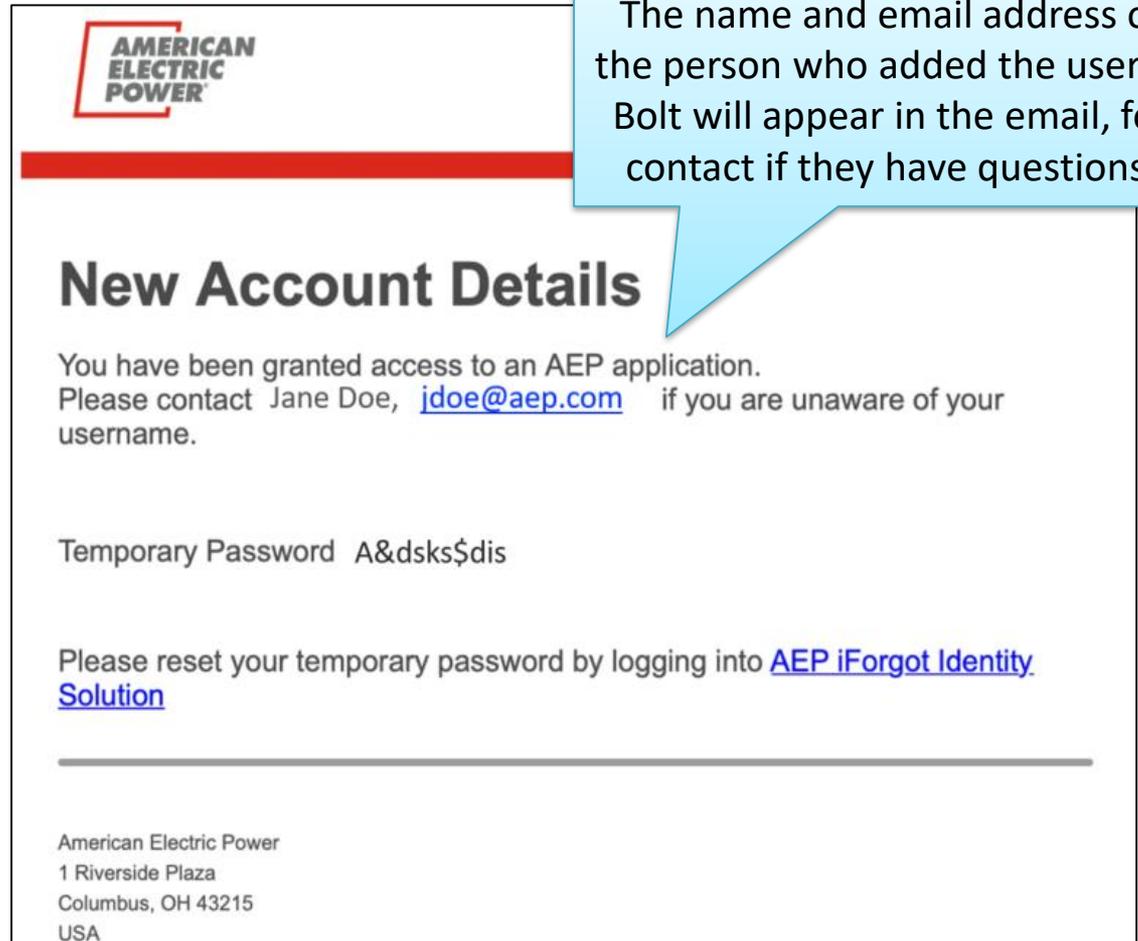Lewis

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 temporary password **(TO iForgot, NOT BPP)**

- Password expires after 90 days.

- 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.

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The name and email address of the person who added the user to Bolt will appear in the email, for contact if they have questions.

New Account Details

You have been granted access to an AEP application.
Please contact Jane Doe, jdoe@aep.com   if you are unaware of your username.

Temporary Password   A&dsks$dis

Please reset your temporary password by logging into AEP iForgot Identity Solution

American Electric Power
1 Riverside Plaza
Columbus, OH 43215
USA

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.

Q & A

Questions?

Thank You for Attending

ohiochoiceoperation@aep.com