

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.

[+1-415-655-0001](tel:+14156550001)

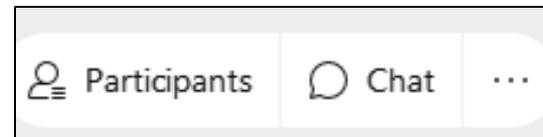
Code: 185 654 2071

- ❑ Please mute when not talking



- ❑ We encourage 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

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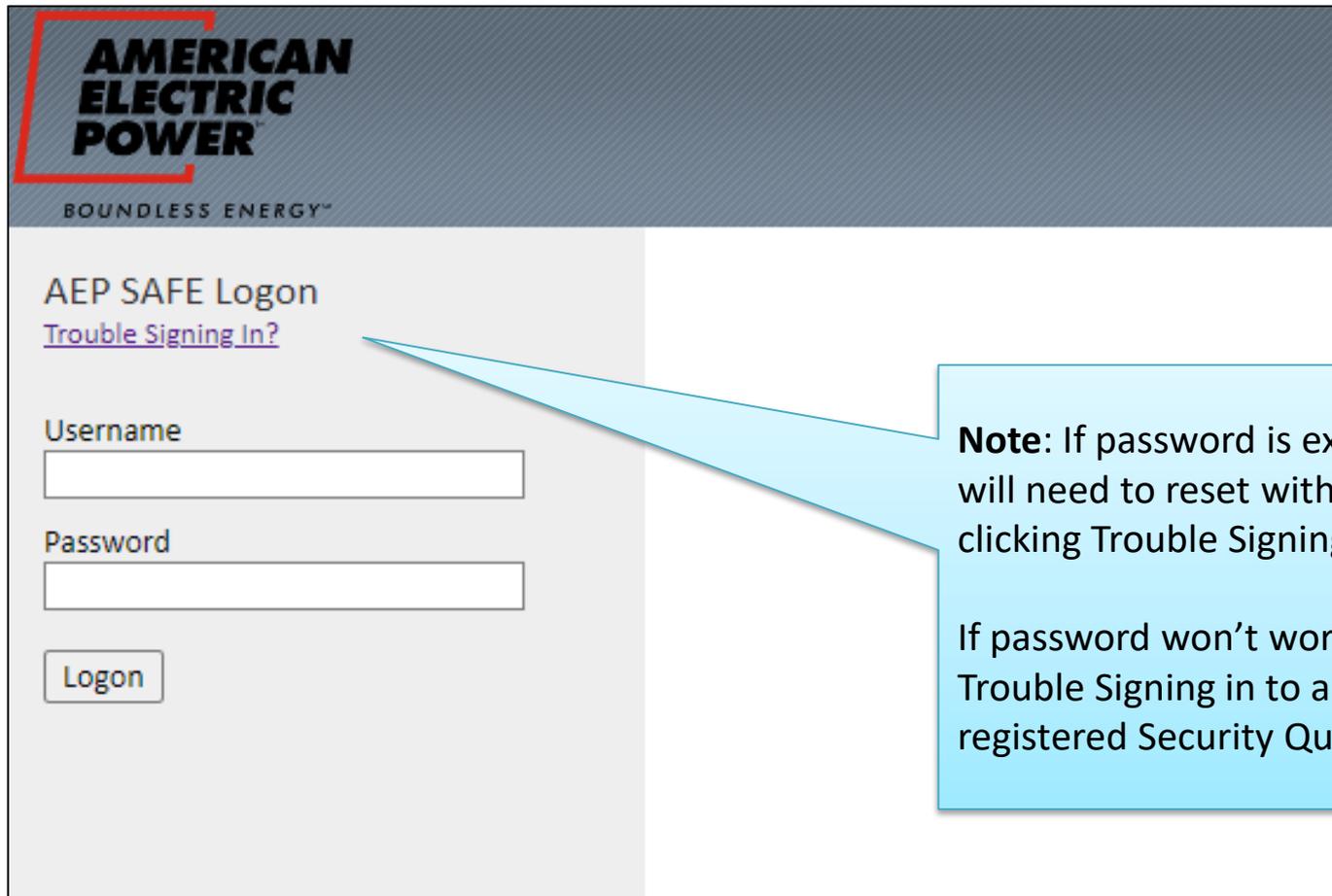
- What is changing for CRES (XAM) Brokers?
- New BPP CRES Broker ability (SYS Admin)
 - Provider User Set up
 - Provider User History
- Overview BOLT Company Set Up
 - Managing Users and Role
 - Manual adds
 - Bulk upload
 - Edit and Delete Users
- Password Management (iForgot)

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 use same credentials to login as now.
All Users will experience this Change.**



The screenshot shows the AEP SAFE Logon page. At the top left is the American Electric Power logo with the tagline 'BOUNDLESS ENERGY™'. Below the logo, the text 'AEP SAFE Logon' is displayed, followed by a link for 'Trouble Signing In?'. There are two input fields: 'Username' and 'Password'. Below the password field is a 'Logon' button. A light blue callout box with a pointer to the 'Trouble Signing In?' link contains the following text:

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.**

The screenshot displays the Business Partner Portal (BPP) interface. At the top, there is a red navigation bar with the American Electric Power logo and several menu items: RATES, ALLOTMENTS, USAGE DATA/REPORTS, ENROLL FROM YOUR WALLET, and SYS ADMIN. Below the navigation bar, the main heading reads "BUSINESS PARTNER PORTAL". On the right side of the page, there is a user greeting: "Welcome: Jane Doe (ABC ENERGY)" followed by a "Logout" link and three icons (home, printer, help). The central focus is a section titled "CRES PROVIDER DEFAULT SELECTION" which contains a dropdown menu labeled "CRES Provider" with a help icon. The dropdown menu is currently set to "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

The screenshot displays the American Electric Power Business Partner Portal. At the top is a red navigation bar with the AEP logo on the left and several menu items: RATES, ALLOTMENTS, USAGE DATA/REPORTS, ENROLL FROM YOUR WALLET, and SYS ADMIN. Below the header, the main content area is titled "BUSINESS PARTNER PORTAL". On the right side of this area, there is a welcome message "Welcome: Jane Doe (ABC ENERGY)", a "Logout" link, and three icons: a home icon, a user profile icon, and a help icon. The main section is titled "CRES PROVIDER DEFAULT SELECTION" and contains a dropdown menu labeled "CRES Provider" with a help icon. The dropdown menu is currently set to "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 

New CRES Broker BPP Header

CRES Broker Managing Users is now 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.



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: The External Provider User saved successfully.
Open Bolt Setup (Seperate Tab)
[Bolt User Setup](#)

SUCCESS or FAIL message will appear

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

Comments as to Status Change

Status of Request

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

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 ⓘ
[Empty Input Field]

Existing Users
Search ←

New User
Add

Provider Name	User	Name	Status		
ABC ENERGY	FLewis@testbop.com	Frank Lewis	Approved	Edit	Revoke

Annotations:
- Arrow points to Search button
- Callout: Current status for User (points to Approved)
- Callout: EDIT this User (points to Edit link)
- Callout: REVOKE this User (points to Revoke link)

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 ▼

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 not 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 not 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

New 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 ⓘ
[Text Input]

Begin Date ⓘ
[Text Input]

End Date ⓘ
[Text Input]

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 ⓘ

User Status ⓘ

User ⓘ

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

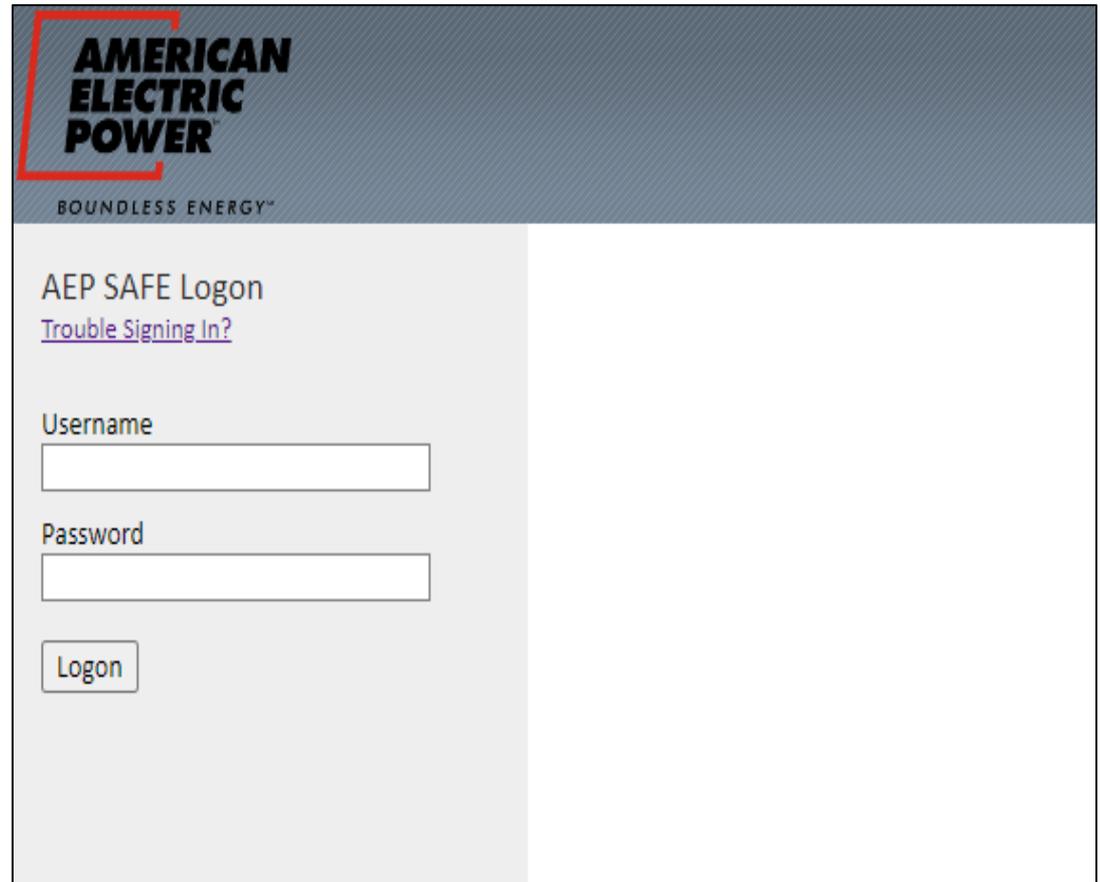
NOTE: BOLT DOES NOT WORK IN INTERNET EXPLORER

- 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.



**AMERICAN
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POWER**
BOUNDLESS ENERGY™

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

Username

Password

Logon

Overview Setup – Companies

**AMERICAN
ELECTRIC
POWER**

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

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Overview Setup – Companies

The screenshot shows the 'BOLT AUTHENTICATION' interface. At the top left is the American Electric Power logo. The main header is 'BOLT AUTHENTICATION'. Below it is a 'MANAGED COMPANIES' tab. The main content area is titled 'MANAGED COMPANIES' and features a search dropdown menu with the text 'Search Companies'. Below the dropdown, two companies are listed: 'ABC ENERGY' and 'DEF ENERGY'. A blue callout box points to the list with the text: 'Multiple DUNs Registration Users will see each Company Separated.' Another blue callout box on the right contains the text: 'Users can only exist in BOLT under one Company. IF user belongs in both, you can assign that in your initial BPP Set up.'

Overview Setup – Companies

**AMERICAN
ELECTRIC
POWER**

BOLT AUTHENTICATION

MANAGED COMPANIES

MANAGED COMPANIES

Search Companies

ABC ENERGY

ABC ENERGY

COMPANY ID: ABCNRG_1717171717

Employees

Authorities

- BULK IMPORT USERS
- REFRESH COMPANY

Select ellipsis next to company name to launch menu

- Option to Import Users in Bulk
- Option to Refresh Company Information

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Overview Setup – Users

AMERICAN ELECTRIC POWER **BOLT AUTHENTICATION**

MANAGED COMPANIES

MANAGED COMPANIES

Search Companies

ABC ENERGY

ABC ENERGY

COMPANY ID: ABCNRG_17171717

Employees

Employee List Search

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

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

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

Overview Setup – Authorities (Role)

AMERICAN ELECTRIC POWER **BOLT AUTHENTICATION**

MANAGED COMPANIES

MANAGED COMPANIES

Search Companies

ABC ENERGY

ABC ENERGY

COMPANY ID: ABCNRG_17171717

Employees

Authorities

Authorities List

Name	Description	Actions
CRES User	User of BPP Application	
Everyone		

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

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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

AMERICAN ELECTRIC POWER **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@testbpb.com	Bob	Smith	⋮
CJones@testbpb.com	Cathy	Jones	⋮

Select + button to add a new user account

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

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New User – Manual Add

The screenshot displays the 'BOLT AUTHENTICATION' interface for 'ABC ENERGY'. A modal window titled 'Add New Employee' is open, containing three input fields: 'Email', 'First Name', and 'Last Name'. Below the fields are 'SUBMIT' and 'CLOSE' buttons. In the background, an 'Employee List' table is visible with columns for 'Email', 'Last Name', and 'Actions'. The table contains two entries: 'BSmith@testbpp.com' with 'Smith' as the last name, and 'CJones@testbpp.com' with 'Jones' as the last name. A blue callout box on the left provides instructions on how to add a new user.

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 Last Name Actions

BSmith@testbpp.com Smith

CJones@testbpp.com Jones

5 rows 1-2 of 2

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Add the same user information from BPP:

- Email
- First Name
- Last Name

Click **Submit** when finished

New User – Manual Add

The screenshot displays the 'MANAGED COMPANIES' section for 'ABC ENERGY'. A green notification banner at the top states 'Successfully added FLewis@testbpp.com to ABC ENERGY'. Below this, the 'Employees' section contains an 'Employee List' table with columns for Email, First Name, Last Name, and Actions. The row for 'FLewis@testbpp.com' is highlighted with a red box. A blue callout box on the left explains that success or failed messages appear at the top of the interface.

MANAGED COMPANIES

Search Companies

ABC ENERGY

MANAGED COMPANIES

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	⋮
FLewis@testbpp.com	Frank	Lewis	⋮

5 rows | 1-3 of 3

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New User – Manual Add


BOLT AUTHENTICATION

MANAGED COMPANIES

MANAGED COMPANIES

ABC ENERGY

ABC ENERGY

COMPANY ID: ABCNRG_1717171717

Employees

Authorities ^

Authorities List Q Search X

Name	Description	Actions
CRES User	User of BPP Application	⋮
Everyone		⋮

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

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

Note: CRES Brokers can only add CRES Users.

New User – Manual Add

AMERICAN ELECTRIC POWER **BOLT AUTHENTICATION**

MANAGED COMPANIES

MANAGED COMPANIES

Search Companies

ABC ENERGY

ABC ENERGY
COMPANY ID: ABCNRG_17171717

Employees

Authorities

Authorities List Search

Name	Description	Actions
CRES User	User of BPP Application	⋮
Everyone		

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

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

New User – Manual Add

The screenshot shows the American Electric Power (AEP) system interface. At the top, there is a notification: "Successfully added BSmith@testbpp.com to CRES User". The main content area is titled "ABC ENERGY" and contains a table with columns for "Employees", "Authorities", and "Authorities". A modal window titled "Add/Remove Users of Authority" is open, displaying a "Users List" table. The table has columns for "Id", "First Name", and "Last Name". Two users are listed: "BSmith@testbpp.com" (Bob Smith) and "CJones@testbpp.com" (Cathy Jones). The first user is selected with a checkmark. The modal also includes a search bar, a "CLOSE" button, and pagination information: "5 rows" and "1-2 of 2".

AMERICAN ELECTRIC POWER
BOUNDLESS ENERGY™

MANAGED COMPANIES

MANAGED COMPANIES

Search Companies

ABC ENERGY

Employees

Authorities

Authorities

1717

Search

Search

Actions

5 rows

1-2 of 2

5 rows

1-2 of 2

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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

AMERICAN ELECTRIC POWER **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@testbop.com	Bob	Smith	⋮
CJones@testbop.com	Cathy	Jones	⋮
FLewis@testbop.com	Frank	Lewis	⋮

5 rows | 1-3 of 3

EDIT
MODIFY GROUP MEMBERSHIPS
DELETE
VIEW EMPLOYEE DETAILS

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

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New User – Manual Add

The screenshot displays the 'MANAGED COMPANIES' section for 'ABC ENERGY'. A modal titled 'Add/Remove Group Memberships' is open, showing a list of groups with checkboxes. The 'CRES User' and 'Everyone' groups are selected. A green notification banner at the top indicates 'Successfully added FLewis@testbpp.com to CRES User'. A table of employees is visible in the background, with columns for 'Last Name' and 'Actions'. The table lists employees Smith, Jones, and Lewis.

AMERICAN ELECTRIC POWER
BOUNDLESS ENERGY™

MANAGED COMPANIES

MANAGED COMPANIES

Search Companies

ABC ENERGY

Employees

Employee L

smith@testbpp.com

CJones@testbpp.com

FLewis@testbpp.com

Successfully added FLewis@testbpp.com to CRES User

ABC ENERGY

Add/Remove Group Memberships

Groups

Search

Name

CRES User

Everyone

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

CLOSE

Last Name

Actions

Smith

Jones

Lewis

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A modal will appear with all of the possible Authorities (Roles) for your company

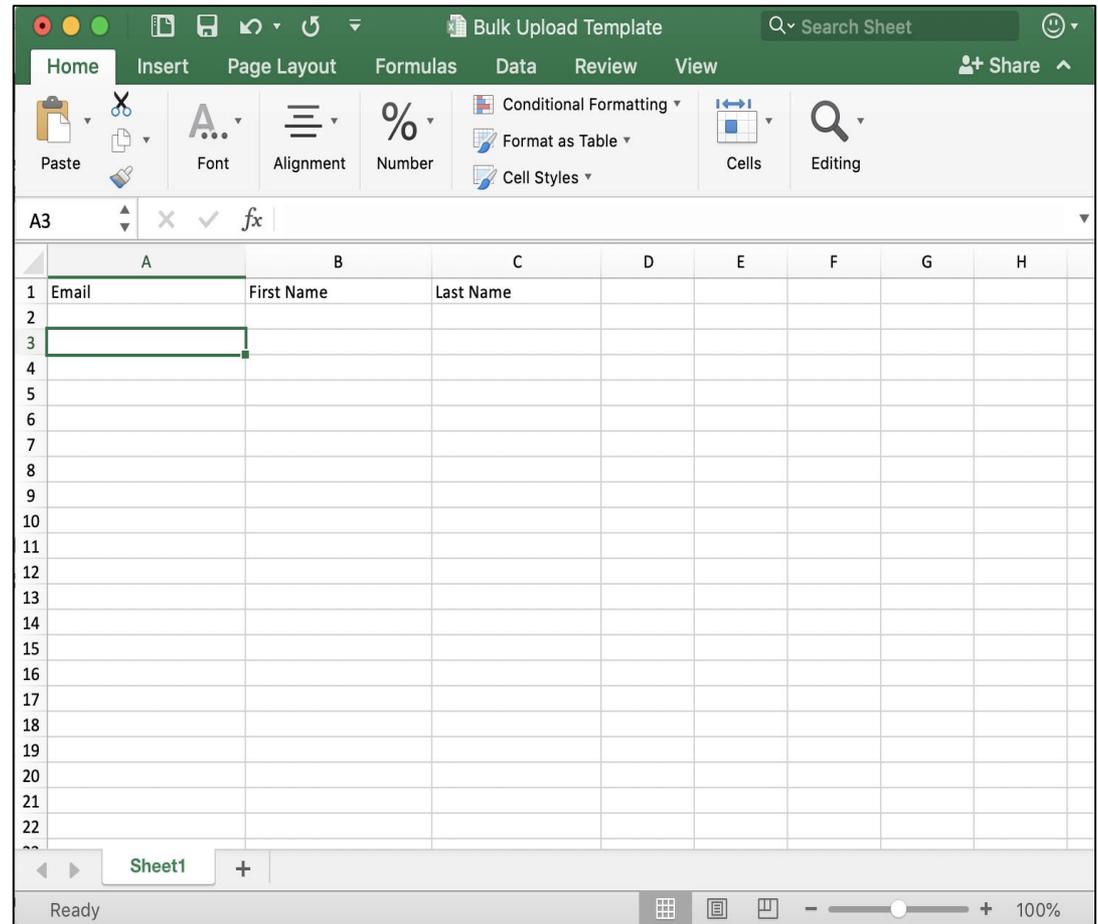
Select the CRES User

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

The screenshot shows a Microsoft Excel spreadsheet titled "Bulk Upload Template...". The ribbon is set to "Home", and the active cell is A6. The spreadsheet contains a table with the following data:

	A	B	C	D	E	F	G
1	Email	First Name	Last Name				
2	samtest@test.com	Sam	Jones				
3	Petestest@test.com	Pete	Townsend				
4	jimtest@test.com	Jim	Dunges				
5	Johntest@test.com	John	Markle				
6							
7							
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10							
11							
12							
13							
14							
15							
16							
17							
18							
19							
20							

New User – Bulk User Upload

**AMERICAN
ELECTRIC
POWER**

BOLT AUTHENTICATION

MANAGED COMPANIES

MANAGED COMPANIES

Search Companies

ABC ENERGY

ABC ENERGY

COMPANY ID: ABCNRG_1717171717

Employees

Authorities

BULK IMPORT USERS

REFRESH COMPANY

Select option to
"BULK IMPORT USERS"

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New User – Bulk User Upload

**AMERICAN
ELECTRIC
POWER**

BOLT AUTHENTICATION

MANAGED COMPANIES

MANAGED COMPANIES

Search Companies

ABC ENERGY

ABC ENERGY

COMPANY ID: ABCNRG_17171717

Employees

Authorities

Bulk Import Users

Instructions:
Bulk upload allows administrators to create accounts for multiple employees at once.

- File must be in CSV or Excel format (extensions .csv, .xlsx, .xls).
- The first column should contain email addresses with header "Email".
- The second column should contain the first names with header "First Name".
- The third column should contain last names with header "Last Name".

No file chosen

CANCEL

Select "Choose File"

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New User – Bulk User Upload

AMERICAN ELECTRIC POWER BOLT AUTHENTICATION

MANAGED COMPANIES

MANAGED COMPANIES

Search Companies

ABC ENERGY

ABC ENERGY
COMPANY ID: ABCNRG_17171717

Employees

Authorities

Bulk Import Users

Instructions:

Open

Documents > BOLT ACCESS

Search BOLT ACCESS

Organize New folder

Name	Date modified
Bolt - Bulk User Upload Template	3/15/2021 1:25 PM

File name: Custom Files

Open Cancel

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

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New User – Bulk User Upload

AMERICAN ELECTRIC POWER
BOUNDLESS ENERGY™

BOLT AUTHENTICATION

MANAGED COMPANIES

MANAGED COMPANIES

Search Companies

ABC ENERGY

ABC ENERGY

COMPANY ID: ABCNRG_17171717

Employees

Authorities

Bulk Import Users

Instructions:
Bulk upload allows administrators to create accounts for multiple employees at once.

- File must be in CSV or Excel format (extensions .csv, .xlsx, .xls).
- The first column should contain email addresses with header "Email".
- The second column should contain the first names with header "First Name".
- The third column should contain last names with header "Last Name".

Choose File Bolt - Bulk ... Template.csv

IMPORT USERS CANCEL

Select "IMPORT USERS"

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New User – Bulk User Upload

BOLT AUTHENTICATION

MANAGED COMPANIES

MANAGED COMPANIES

Search Companies

ABC ENERGY

DEF ENERGY

ABC ENERGY

COMPANY ID: ABCNRG_17171717

Employees

Employee List

Search

Bulk Import Users

3 Employees added.

1 Errors

- Row 5: Tmiller@testbpp.com, Ted, Miller User is invalid, please choose a different Username.

DONE

Email	Last Name	Actions
sSmith@testbpp.com	Smith	⋮
CJones@testbpp.com	Jones	⋮
FLewis@testbpp.com	Lewis	⋮
Jnorth@testbpp.com	North	⋮
Mahort@testbpp.com	Short	⋮

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 – Bulk User Upload

AMERICAN ELECTRIC POWER **BOLT AUTHENTICATION**

MANAGED COMPANIES

MANAGED COMPANIES

Search Companies

ABC ENERGY

ABC ENERGY

COMPANY ID: ABCNRG_17171717

Employees

Authorities

Authorities List

Name	Description	Actions
CRES User	User of BPP Application	⋮
Everyone		

MODIFY GROUP MEMBERS

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

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

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New User – Bulk User Upload

The screenshot shows the American Electric Power user management interface. A green notification banner at the top states "Successfully added BSmith@testbpp.com to CRES User". The main content area is for "ABC ENERGY" and includes a "MANAGED COMPANIES" sidebar with a search box and a list containing "ABC ENERGY". A modal titled "Add/Remove Users of Authority" is open, displaying a "Users List" table with columns for "Id", "First Name", and "Last Name". The table contains two rows: one for "BSmith@testbpp.com" (Bob Smith) which is checked, and one for "CJones@testbpp.com" (Cathy Jones) which is not checked. The modal also features a search bar, a "CLOSE" button, and pagination controls showing "5 rows" and "1-2 of 2".

MANAGED COMPANIES

MANAGED COMPANIES

Search Companies

ABC ENERGY

Employees

Authorities

Authorities

1717

Q Search

Q Search

Actions

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

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

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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

AMERICAN ELECTRIC POWER **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@testbpb.com	Bob	Smith	⋮
CJones@testbpb.com	Cathy	Jones	⋮
FLewis@testbpb.com	Frank	Lewis	⋮

5 rows | 1-3 of 3

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

Edit or Delete Users

Edit User

Update Employee

Email
FLewis@testbpp.com

First Name
Frank

Last Name
Lewis

SUBMIT **CLOSE**

Delete User

Delete FLewis@testbpp.com?

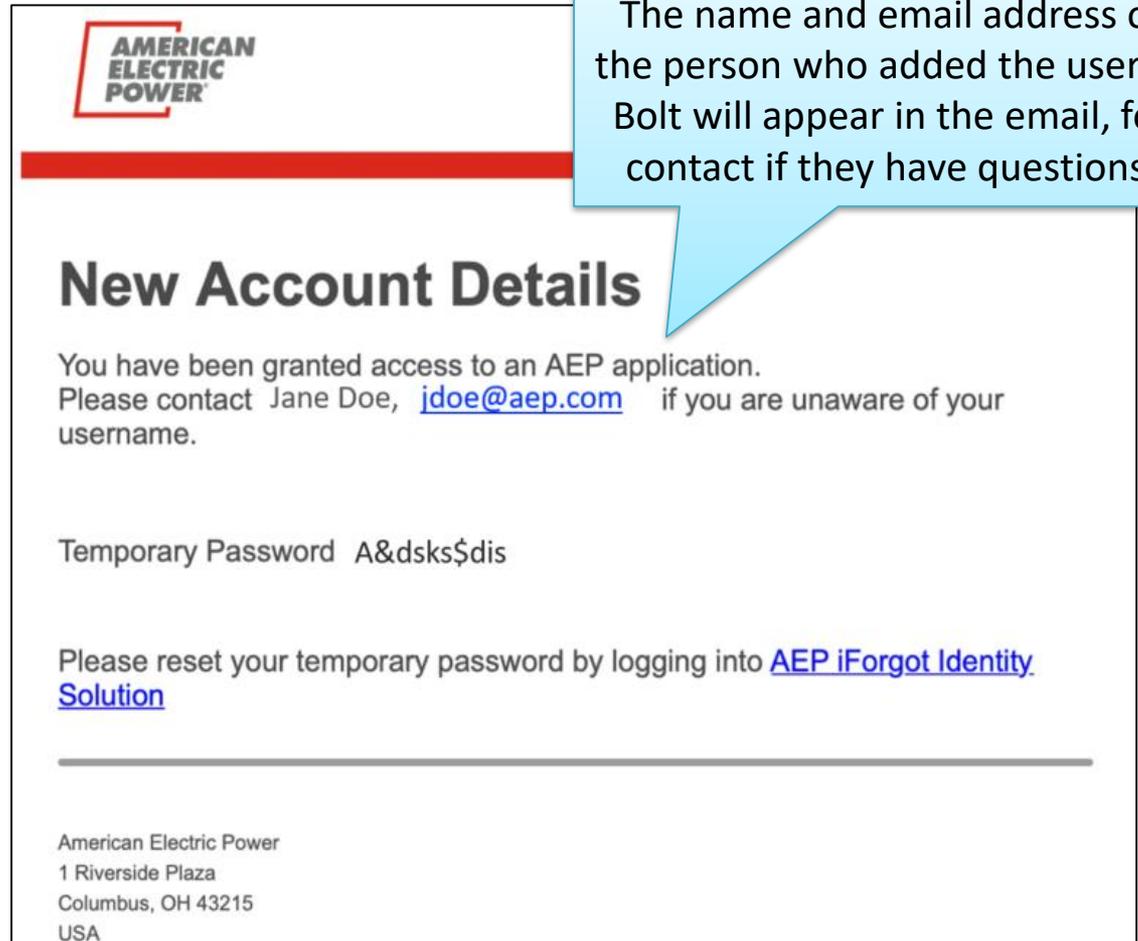
Are you sure you want to delete this employee?

CONFIRM **CANCEL**

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

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.



**AMERICAN
ELECTRIC
POWER**

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&dsk\$dis

Please reset your temporary password by logging into [AEP iForgot Identity Solution](#)

American Electric Power
1 Riverside Plaza
Columbus, OH 43215
USA

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.

iForgot Process

Click this link: [Iforgot.aep.com](https://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.

**AMERICAN
ELECTRIC
POWER**
BOUNDLESS ENERGY™

Self-Service Password Reset

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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Q & A

Questions?

Thank You for Attending

ohiochoiceoperation@aep.com