

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

Ohio Choice Operations
February 2023

Table of Contents

BPP

1. CRES Broker **BPP** View.....pg 3-6
2. BPP Provider User Tab.....pg 7-14
 1. Adding Users...pg 7-9
 2. Existing Users...pg 10
 3. Editing Users...pg 11-12
 4. Revoke User...pg 13
3. BPP User History.....pg 15-16
4. CRES Broker **BOLT** View.....pg 17-22
5. BOLT Manual Add Users.....pg 23-31
6. BOLT Bulk User upload.....pg 32-40
7. Manage Users: EDIT/Delete.....pg 41-42
8. *Password Management*.....pg 43-47

BOLT

BPP Logon Page

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

**AMERICAN
ELECTRIC
POWER**
BOUNDLESS ENERGY™

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.

CRES Provider Selection Page

CRES Provider Page upon logging into BPP.

The screenshot displays the American Electric Power Business Partner Portal (BPP) interface. At the top, there is a red navigation bar with the AEP logo and 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, a user is logged in, indicated by "Welcome: Jane Doe (ABC ENERGY)" and a "Logout" link. A dropdown menu for "CRES Provider" is visible, with "ABC ENERGY" selected. Two callout boxes provide additional information: one points to the dropdown menu, and another points to the user's name in the top right corner.

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

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AEP Business Partner Portal v




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


**AMERICAN
ELECTRIC
POWER** 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 

American Electric Power - Copyright 2011 AEP Business Partner Portal v3.00 N

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.



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

**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

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

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@testbpp.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"
- Callout: "REVOKE this User" points to "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 not 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 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

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

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	CREUser	JDoe007@testbpp.com
ABC ENERGY	FLewis@testbpp.com	Frank Lewis	CREUser	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

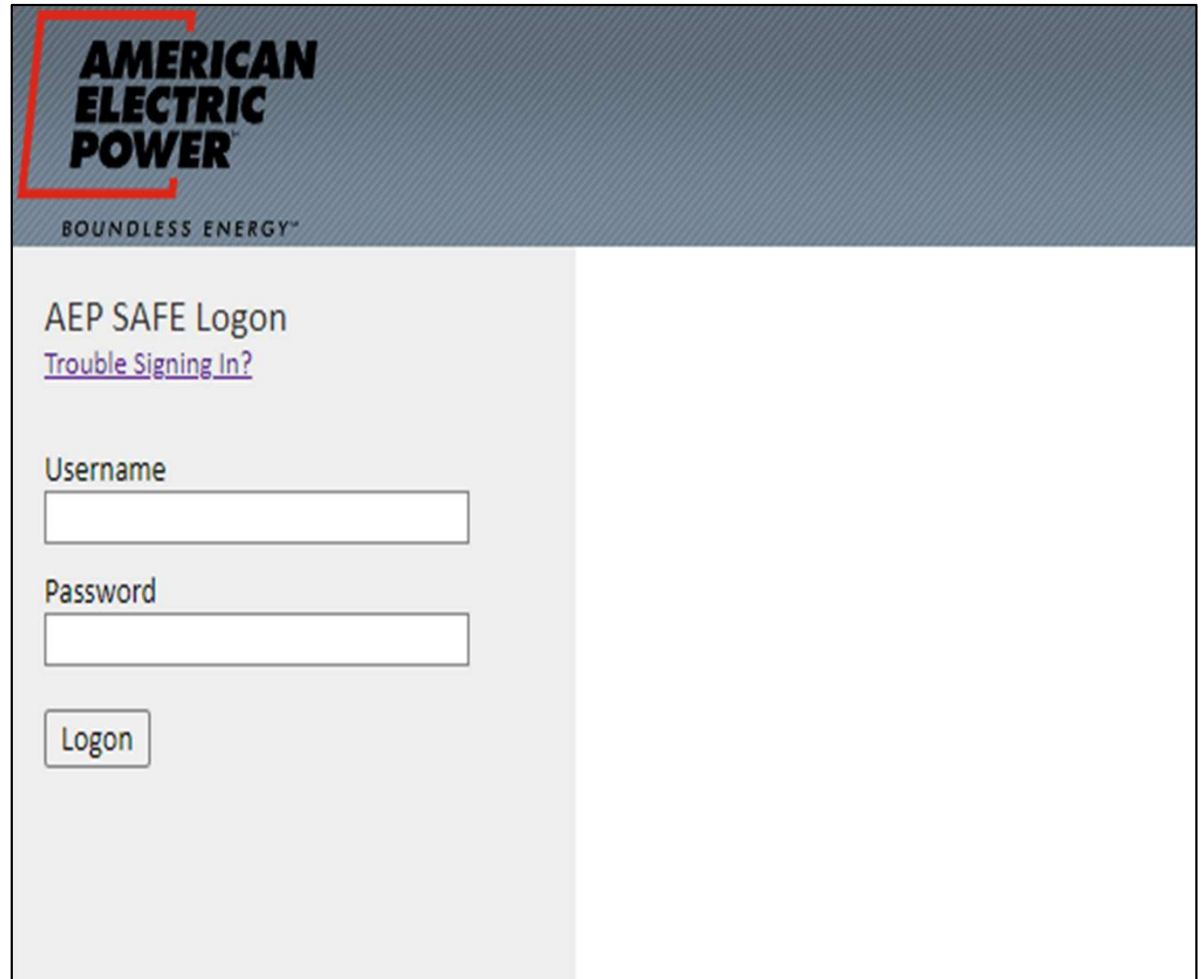
NOTE: BOLT DOES NOT WORK IN INTERNET EXPLORER

- 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.



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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_17171717

Employees

Groups

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

**AMERICAN
ELECTRIC
POWER**

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.

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Overview Setup – Companies

**AMERICAN
ELECTRIC
POWER**

BOLT AUTHENTICATION

MANAGED COMPANIES

MANAGED COMPANIES

Search Companies

ABC ENERGY

ABC ENERGY

COMPANY ID: ABCNRG_17171717

Employees

Groups

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 after updating users

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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_1717171717

Employees

Employee List Search X

Email	First Name	Last Name	Actions
BSmith@testbpb.com	Bob	Smith	⋮
CJones@testbpb.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 – Group

The screenshot displays the 'BOLT AUTHENTICATION' interface for 'ABC ENERGY'. The company ID is 'ABCNRG_17171717'. The interface is divided into sections: 'MANAGED COMPANIES' (with a search dropdown and 'ABC ENERGY' selected), 'Employees', and 'Groups'. The 'Groups' section is highlighted with a green box and contains a 'Groups List' table. A callout box points to the table with the text: 'Existing users will be added to their appropriate group (based on existing BPP Roles)'. The table has columns for Name, Description, and Actions. It lists 'CRES User' (User of BPP Application) and 'Everyone'. A footer contains terms and conditions and copyright information.

AMERICAN ELECTRIC POWER BOLT AUTHENTICATION

MANAGED COMPANIES

MANAGED COMPANIES

Search Companies

ABC ENERGY

ABC ENERGY
COMPANY ID: ABCNRG_17171717

Employees

Groups

Groups List Search X

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 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 **BOLT AUTHENTICATION**

MANAGED COMPANIES

MANAGED COMPANIES

Search Companies

ABC ENERGY

ABC ENERGY

COMPANY ID: ABCNRG_1717171717

Employees

Employee List Search X

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 last name 'Smith', and 'CJones@testbpp.com' with last name 'Jones'. A search bar and a '+ Add' button are also present in the interface.

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BOLT AUTHENTICATION

MANAGED COMPANIES

MANAGED COMPANIES

Search Companies

ABC ENERGY

ABC ENERGY
COMPANY ID: ABCNRG_17171717

Employees

Employee List

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

Q Search

Add New Employee

Email

First Name

Last Name

SUBMIT CLOSE

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 shows an 'Employee List' table with three entries. The entry 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 every action. The footer contains the terms and conditions and copyright information.

MANAGED COMPANIES

Search Companies

ABC ENERGY

ABC ENERGY
COMPANY ID: ABCNRG_17171717

Employees

Employee List

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

AMERICAN ELECTRIC POWER BOLT AUTHENTICATION

MANAGED COMPANIES

MANAGED COMPANIES

Search Companies

ABC ENERGY

ABC ENERGY
COMPANY ID: ABCNRG_17171717

Employees

Groups

Groups List

Name	Description	Actions
CRES User	User of BPP Application	
Everyone		

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

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

Note: CRES Brokers can only add CRES Users.

New User – Manual Add

The screenshot shows the 'BOLT AUTHENTICATION' interface for 'ABC ENERGY'. The 'MANAGED COMPANIES' sidebar lists 'ABC ENERGY'. The main content area shows the 'Groups List' table with the following data:

Name	Description	Actions
CRES User	User of BPP Application	[Ellipsis]
Everyone		

A callout box points to the ellipsis icon next to the 'CRES User' row, with the text: "Select ellipsis next to CRES User to launch menu Modify Group Members (add Users to their group)". A green arrow points to the ellipsis icon, and a dropdown menu is visible with the option "MODIFY GROUP MEMBERS".

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New User – Manual Add

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 displays a "Groups List" with a "Groups List" table. A modal titled "Add/Remove Users of Group" is open, showing a "Users List" table with two users: BSmith@testbpp.com (Bob Smith) and CJones@testbpp.com (Cathy Jones). The BSmith user is selected with a checked checkbox. The modal includes a search bar, a table with columns for Id, First Name, and Last Name, and a "CLOSE" button at the bottom right. A blue callout box points to the modal with the text: "A modal will appear with all of the possible Users for your company" and "Select the appropriate User to add to CRES User".

MANAGED COMPANIES

MANAGED COMPANIES

Search Companies

ABC ENERGY

Employees

Groups

Groups List

Name

CRES User

Everyone

ABC ENERGY

1717

Successfully added BSmith@testbpp.com to CRES User

Add/Remove Users of Group

Users List

Search

Id	First Name	Last Name
<input checked="" type="checkbox"/> BSmith@testbpp.com	Bob	Smith
<input type="checkbox"/> CJones@testbpp.com	Cathy	Jones

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

CLOSE

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

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New User – Manual Add

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	⋮
FLewis@testbpp.com	Frank	Lewis	⋮

5 rows 1-3 of 3

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New User – Manual Add

The screenshot displays the American Electric Power user management interface. At the top, a green notification banner reads "Successfully added FLewis@testbpp.com to CRES User". The main content area is titled "ABC ENERGY" and shows a list of employees. A modal window titled "Add/Remove Group Memberships" is open, displaying a table of groups. The table has a search bar and a close button. The groups listed are "CRES User" and "Everyone", both of which have their selection checkboxes checked. A light blue callout box on the left points to the "CRES User" checkbox, and another callout box on the right points to the "Everyone" checkbox.

MANAGED COMPANIES

MANAGED COMPANIES

Search Companies

ABC ENERGY

Employees

Employee L

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

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

Select the CRES User

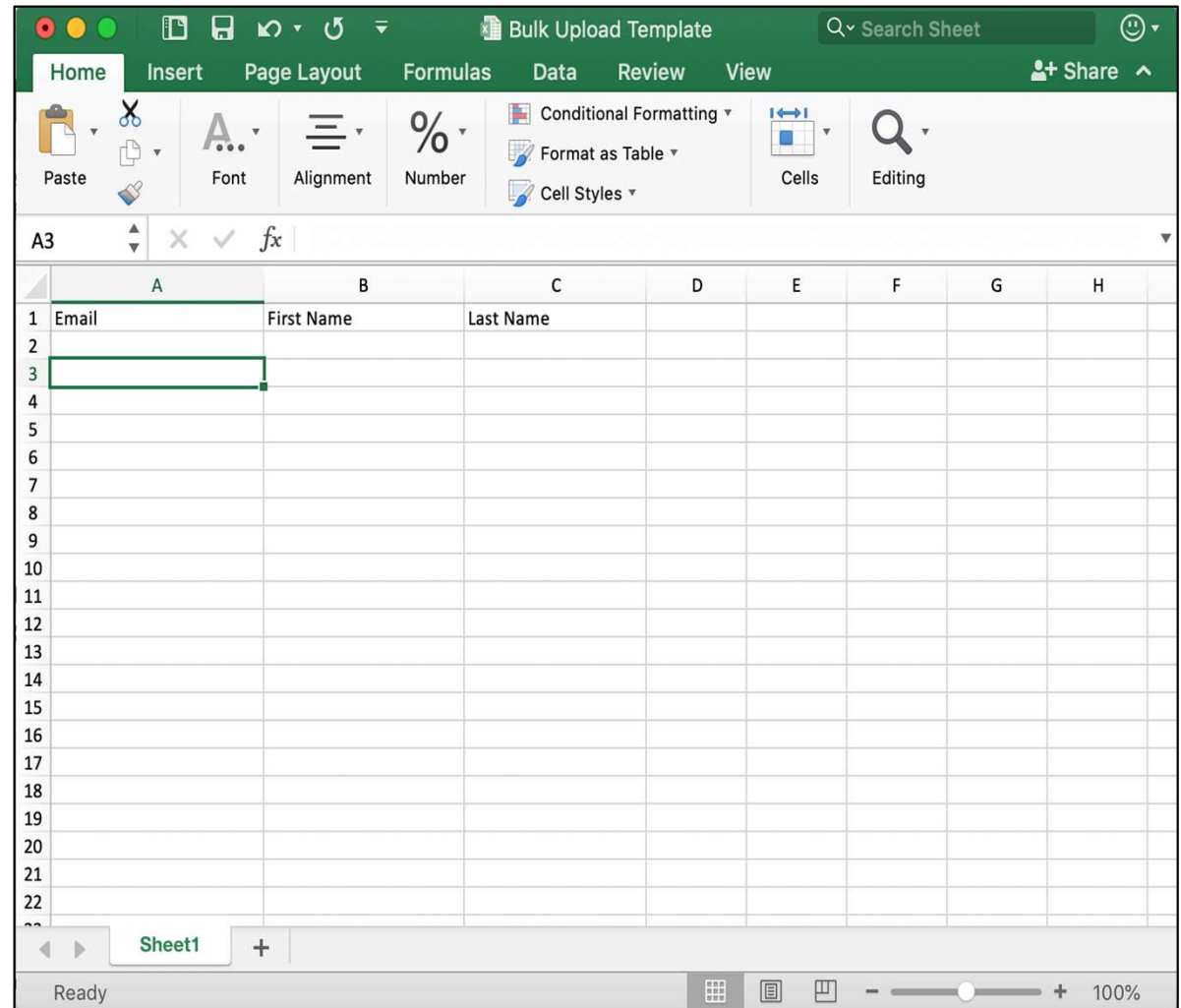
Note: All users are automatically added to the "Everyone" group.

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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.



New User – Bulk User Upload

Save completed file to
your computer

The screenshot shows a Microsoft Excel spreadsheet titled "Bulk Upload Template...". The spreadsheet has a header row with columns A through G. The data is organized as follows:

	A	B	C	D	E	F	G
1	Email	First Name	Last Name				
2	samtest@test.com	Sam	Jones				
3	Petest@test.com	Pete	Townsend				
4	jimtest@test.com	Jim	Dunges				
5	Johnstest@test.com	John	Markle				
6							
7							
8							
9							
10							
11							
12							
13							
14							
15							
16							
17							
18							
19							
20							

The spreadsheet interface includes a ribbon with tabs for Home, Insert, Page Layout, Formulas, Data, Review, and View. The Home tab is active, showing options for Paste, Font, Alignment, Number, Conditional Formatting, Format as Table, Cell Styles, Cells, and Editing. The status bar at the bottom indicates "Ready" and "100%" zoom.

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

Groups

- BULK IMPORT USERS
- REFRESH COMPANY

Select option to "BULK IMPORT USERS"

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New User – Bulk User Upload

The screenshot displays the BOLT AUTHENTICATION interface for ABC ENERGY. A modal dialog box titled "Bulk Import Users" is open, providing instructions for bulk user uploads. The instructions state that bulk upload allows administrators to create accounts for multiple employees at once and list the required file format and column headers. A "Choose File" button is highlighted with a callout box.

BOLT AUTHENTICATION

AMERICAN ELECTRIC POWER

MANAGED COMPANIES

MANAGED COMPANIES

Search Companies

ABC ENERGY

ABC ENERGY

COMPANY ID: ABCNRG_1717171717

Employees

Groups

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 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

Groups

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

The screenshot displays the 'BOLT AUTHENTICATION' interface for 'ABC ENERGY'. The company ID is 'ABCNRG_17171717'. A 'Bulk Import Users' dialog box is open, providing instructions for file uploads. The instructions state that the file must be in CSV or Excel format (.csv, .xlsx, .xls) and specify the required column headers: 'Email', 'First Name', and 'Last Name'. A 'Choose File' button is present, with a file named 'Bolt - Bulk ... Template.csv' selected. The 'IMPORT USERS' button is highlighted with a blue callout box that says 'Select "/>

New User – Bulk User Upload

BOLT AUTHENTICATION

MANAGED COMPANIES

MANAGED COMPANIES

ABC ENERGY

DEF ENERGY

ABC ENERGY

COMPANY ID: ABCNRG_17171717

Bulk Import Users

3 Employees added.

1 Errors

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

DONE

Employees

Employee L	Last Name	Actions
Smith	Smith	
Jones	Jones	
Lewis	Lewis	
North	North	
Short	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 – Manual Add

AMERICAN ELECTRIC POWER BOLT AUTHENTICATION

MANAGED COMPANIES

MANAGED COMPANIES

Search Companies

ABC ENERGY

ABC ENERGY

COMPANY ID: ABCNRG_17171717

Employees

Employee List

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

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 displays a "Users List" modal. The modal contains a table with the following data:

Id	First Name	Last Name
<input checked="" type="checkbox"/> BSmith@testbpp.com	Bob	Smith
<input type="checkbox"/> CJones@testbpp.com	Cathy	Jones

The modal also includes a search bar, a "CLOSE" button, and pagination controls showing "5 rows" and "1-2 of 2".

AMERICAN ELECTRIC POWER
BOUNDLESS ENERGY™

MANAGED COMPANIES

MANAGED COMPANIES

Search Companies

ABC ENERGY

Employees

Groups

Groups List

Name

Everyone

ABC ENERGY

1717

Successfully added BSmith@testbpp.com to CRES User

Add/Remove Users of Group

Users List

Search

Id

First Name

Last Name

BSmith@testbpp.com

Bob

Smith

CJones@testbpp.com

Cathy

Jones

5 rows

1-2 of 2

CLOSE

5 rows

1-2 of 2

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

AMERICAN ELECTRIC POWER **BOLT AUTHENTICATION**

MANAGED COMPANIES

MANAGED COMPANIES

Search Companies

ABC ENERGY

ABC ENERGY
COMPANY ID: ABCNRG_17171717

Employees

Employee List

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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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 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 register 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=Fskmurb4nHdENZrhAQbBikWzup026BMC4PrYQf4oWate4dNcGLoVHmzP5UCXRqev6HZGJLPfarQvUSfOai8OKulmvzCbwrF3wddIx1ITsd0s5q7Mfu1or5gALKUIjy4vA03RugGKyxHst34nKRldNDScp8eSytvXh4YAcZyZf0Gz1f8car06oPHYkaRstU8uIqmTck6-P75iIH_eoN4x6FcimmiTvIpUqZaEzCQG6iiHbFziQzOnK0zrh6UNARLW3x_wZqeUGd-5umuoEzJiz6HnPiLVN1iDKSQk9hUjmiivmO2NierBIE7wHILmnpCihVJRCvEG_AB2d_Vvww

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.

**AMERICAN
ELECTRIC
POWER**
BOUNDLESS ENERGY™

Self-Service Password Reset

User Id

Password

[Login](#)

[Trouble Signing In?](#)

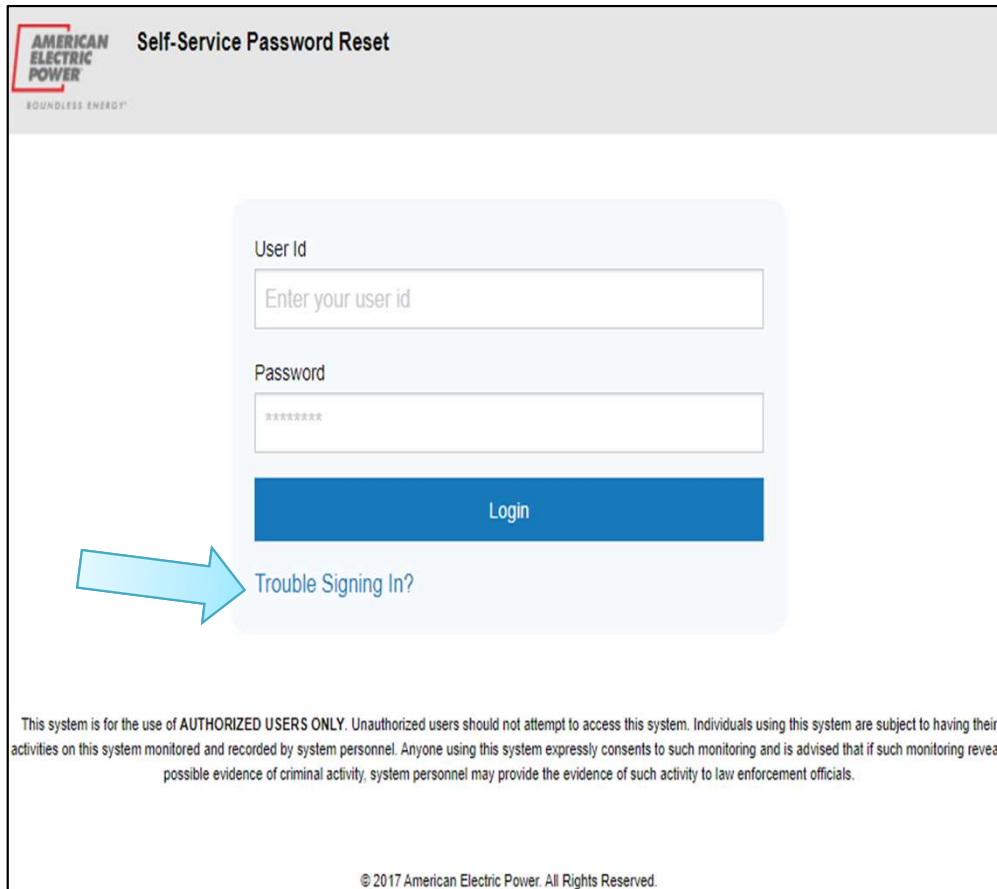
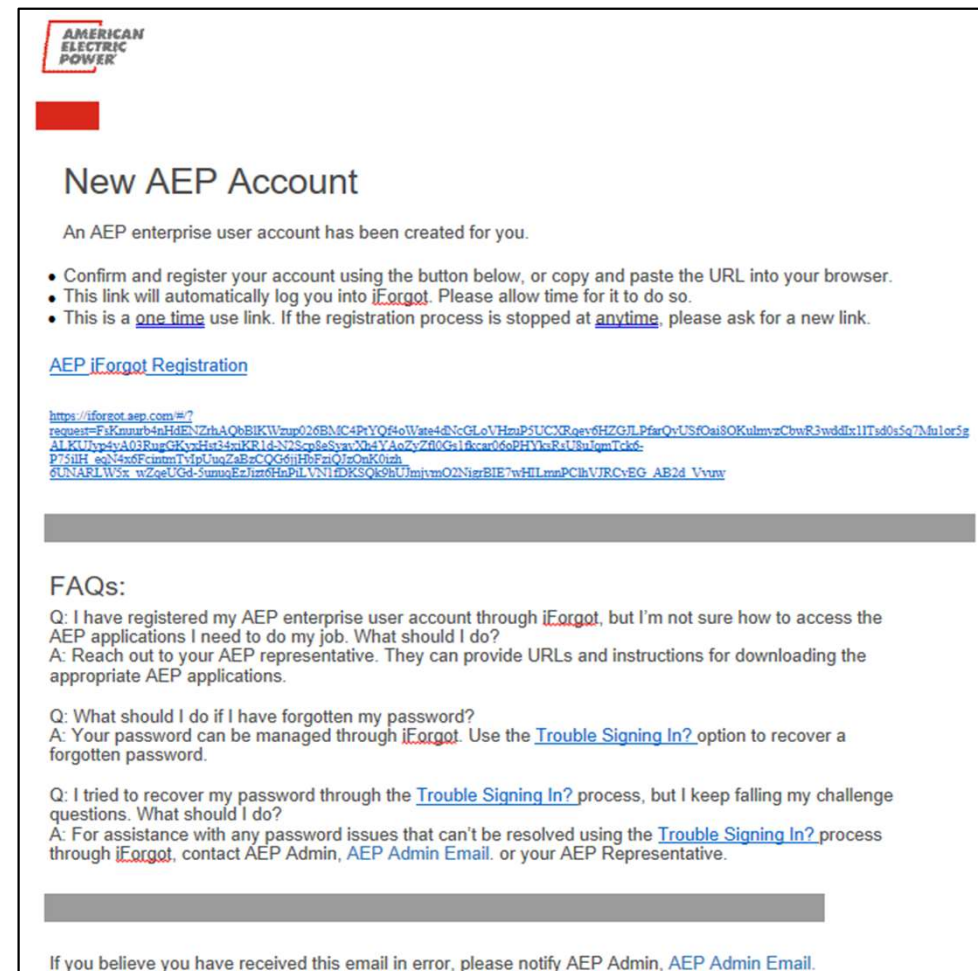
This system is for the use of AUTHORIZED USERS ONLY. Unauthorized users should not attempt to access this system. Individuals using this system are subject to having their activities on this system monitored and recorded by system personnel. Anyone using this system expressly consents to such monitoring 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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iForgot Password Expired

If you have an acct Registered and you cannot 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 cannot answer your security questions, then your iForgot account needs reset. A new email URL link will be sent to register in iForgot again.

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**

ABC ENERGY ⋮
 COMPANY ID: ABCNRG_1717171717

Employees ^

Employee List 🔍 Search ✕

Email	First Name	Last Name	
BSmith@testbpp.com	Bob	Smith	⋮
CJones@testbpp.com	Cathy	Jon	✎ EDIT
FLewis@testbpp.com	Frank	Lew	👤 MODIFY GROUP MEMBERSHIPS
Jnorth@testbpp.com	Jack	Nor	🗑️ DELETE
			🔒 RESET ACCOUNT
			ℹ️ VIEW EMPLOYEE DETAILS

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

Select Reset Account.
 Confirm on Pop up, YES

Reset Employee Account

The user's password is expired. (2021-06-02)

Send the user to iforgot.aep.com first for all password issues. They may need to use the *Trouble signing in?* link on iForgot.

This reset process will force the user to completely re-enroll in iForgot to set up a new password.

Are you sure that you want to proceed?

CANCEL **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 email notification sent.**
 - ***Notification in BPP**



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- 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=FzKmmurb4nHdENZrhAObBkIWzup026BMC4PrYO4oWate4dNcGLoVHmP5UCXRqev6HZGJLPfarQvUSfOai8OKulmvzCbwr3wddfxl1Tsd0s5q7Mnlor5gALKUUypdyA03RngCKy7Hst34ynKR1d3N7Scp8eSyan304YAcZyZf0Gz1Rrcar06oPHYksRaU8uIqmTckdP75iIH_eqN4x6FcinmmTvIpUuoZaBzCQG6iiHbFziQzOnK0i2h8UNARLW5x_wZoeUGd-5umqEzJzt6HnPhLVN1HDKSQk9hUjmitvmO2NigrBIE7wHLLmnpCllhVJRCvEG_Ab2d_Vvnu

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If you believe you have received this email in error, please notify AEP Admin, [AEP Admin Email](#).