

ESOS- Energy Savings Opportunity Scheme

High Level Guidance & Demonstration On :

1. User Account Set-up :
 - Responsible Undertaking user account
 - Two Factor Authentication (2FA) set-up
2. Organisation Account set-up
 - Organisation registration number is needed
 - Organisation Name & Address – Populated automatically from Companies House

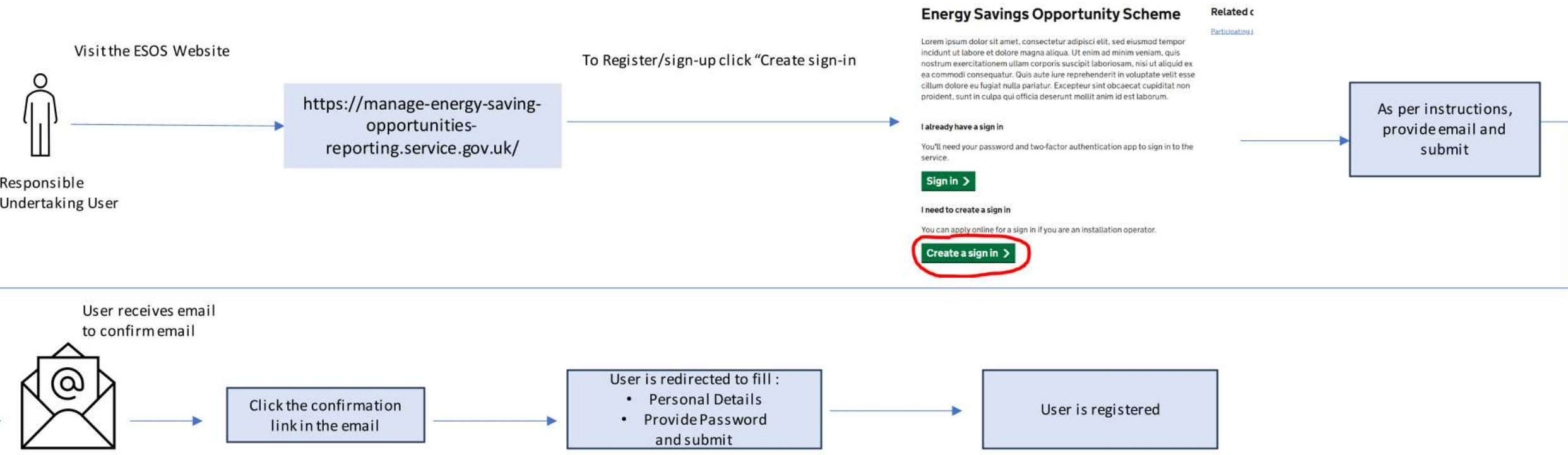
Important Note:

3. Once the user account is set-up
 - You will need your password together with your 2FA each time you access your account
 - If required either one of them can be used to reset the other
 - If you lose both, contact ESOS IT help desk: esos-it@environment-agency.gov.uk
4. Organisation Location:
 - The organisation location is set by default as ENGLAND.
 - If this needs changing choose the appropriate location from the list (England, Wales, Scotland, Northern Ireland and Offshore)

Step by step guide on how Responsible Undertaking users can set-up their user account & apply for an organisation account

Step #	User Actions
Step 1 : Pre-requisite	<p>Download any of the following 5 authenticator apps either on your iPhone/Android mobile or add browser add-on.</p> <p>You will need the authenticator app to set-up your 2FA</p> <ul style="list-style-type: none"> •Free OPT •Microsoft •Google •OKTA •SendGrid (Authy) <p><u>Guidance Note:</u></p> <p>Refer to the Guidance material & video provided separately</p>
Step 2 : User Sign-up /registration	<ul style="list-style-type: none"> ▪ Visit ESOS website and click “Create Sign-in”. This link will be activated and shared on the 19 March via newsletters and email contacts. ▪ Provide your email id → Receive an email to confirm the entered email . ▪ Provide your details, set-up password ▪ Create your account
Step 3 : Set-up 2FA (2 Factor Authenticator) Set-up	<ul style="list-style-type: none"> ▪ Login with your credentials ▪ System displays QR Code (QR code is displayed only for new user or when 2FA code is reset) ▪ Scan the QR code using the authenticator app and follow the instructions ▪ Generate a 6 Digit code and Set-up 2FA
Step 4 Organisation Account	<ul style="list-style-type: none"> ▪ Login (if not logged in already) ▪ Click Apply for Organisation Account ▪ Enter organisation registration number ▪ Verify the Name, Address, SIC code details and update as necessary (The details are populated automatically from Companies House) ▪ Select the appropriate location of the registered address (England, Wales, Scotland, Northern Ireland and Offshore) ▪ Submit the account
Step 5: Wait for Approval	<ul style="list-style-type: none"> ▪ The ESOS Scheme administration will verify the submitted account ▪ If approved: Account becomes LIVE (System will send notification email confirming that the account is approved) ▪ If Rejected , you need to re-submit the account. (Scheme admin will provide information on the reason for rejection)
Step 6: Account search (only if account is approved)	<ul style="list-style-type: none"> ▪ Login ▪ Access the “Account” section ▪ Organisation Accounts are listed (if 2 or more exists, all accounts will be listed) ▪ Choose and click any account to see organisation details

Step 2: User Account Set-up – Visual flow of the User account set-up process



Step 3: Visual flow of Sign-in and 2FA(2Factor Authentication)

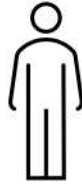
Pre-requisite :

1. User has registered
2. Download any of the authenticator apps on your mobile (or as browser extension)

(Refer to the Guidance information provided on how to download authenticator app)

- Free OPT
- Microsoft
- Google
- OKTA
- SendGrid (Authy)

As a Registered user



Visit the site
<https://manage-energy-saving-opportunities-reporting.service.gov.uk/>

Click "sign in" button

Login using the username & password used while registering

The QR page is displayed if either

- logged in for first time or
- admin resets the 2FA Authenticator

Application displays page to scan a QR code

To set-up 2FA,

- Open the authenticator app
- Scan the QR code and follow instruction
- This Generates a 6-digit code

Input the 6 Digit code in the application

Application Authenticates and user is Signed-in

Note: 2FA set-up is done only once. Each time user wants to login, just open the app, generate the 6-digit token and login

Step 4 ,5 & 6 : Organisation Account – Apply, Approve & Account Search

