

ESOS- Energy Savings Opportunity Scheme

High Level Guidance & Demonstration On ESOS User Management

- Add Additional users (Advanced & Restricted)
- Delete / Disable Users

Important Information for Responsible Undertaking (Advanced User) when adding additional User

Add User	Account Status	Comment
Step 1: New User added	Awaiting Confirmation	Account Status will be in "Awaiting Confirmation"
Step 2: When New User set-up account	ACCEPTED	Account Status changes to "ACCEPTED"
Step 3: Advanced User should manually change the status from ACCEPTED → ACTIVE	ACTIVE	For New User, can log in but cannot see organisation account until their account status is changed to ACTIVE

User Management

Step #	Actions
Add Additional Users	<p>As a Responsible Undertaking User (Advanced User) I can</p> <ul style="list-style-type: none"> ▪ Add Other Advanced or Restricted users. ▪ The system then sends out invitation email with activation link to set-up account. <p><u>Important Note:</u></p> <ul style="list-style-type: none"> ▪ Anyone with a valid email id can be added as users. ▪ The added users can be Advanced or Restricted user type. ▪ A user can be added to multiple organisations. ▪ Each email id will have one sign-in /account to access multiple organisation accounts. ▪ Users can see all of their associated organisation list in the “Account” section
Delete / Disable	<p>As an advanced user, I can</p> <ul style="list-style-type: none"> ▪ Remove user (Remove user from organisation) ▪ Disable User (Temporarily remove access)

Advanced User	Restricted user
<ul style="list-style-type: none"> ▪ A Responsible Undertaking can be added an Advanced user 	<ul style="list-style-type: none"> ▪ An external Lead assessor should only be added as Restricted User
<ul style="list-style-type: none"> ▪ An Advanced user have full rights to add , delete, disable additional Users 	<ul style="list-style-type: none"> ▪ Cannot add other users
<ul style="list-style-type: none"> ▪ Can Search for Account & view organisation details 	<ul style="list-style-type: none"> ▪ Can Search for Account & view organisation details

User Management : Add New users, Remove or disable existing users

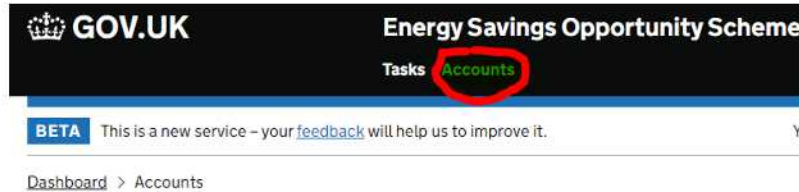
Pre-requisite: Organization Account is approved.

A Responsible Undertaking
User (Advanced User)



Log-in to application

Go to Accounts tab



The Accounts page list all the organizations

Accounts

Enter ID, name or code

AL Test Organization 1
ORG000001

This will display all organisation details

Click on the organization

AL Test Organization 1 LIVE

Select User and contact's tab



AL Test Organization 1 LIVE

Start a new task

Details Phases **Users and contacts** Workflow history

Users and contacts

Add a new user

Restricted user

[Learn more about user types, roles and permissions](#)

Name	User type	Primary contact	Secondary contact	Account status	
opuser1	Advanced user	<input type="radio"/>	<input type="radio"/>	Active	<input type="button" value="Remove"/>

Select new user type
Either Advanced / Restricted
and click Continue

Add an advanced user

This user will have permissions to:

- Add and remove other users from your account
- Perform all account tasks
- Submit Notification of Compliance

You should only grant these permissions to a person that is authorised to do so and

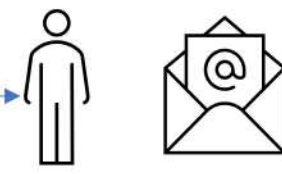
First name

Last name

Enter the email address they use to access the service

Enter user details to add:
First Name,
Last Name
Email address &
Submit

New User



The new user receives activation email
From here follow the guidance provided on:

- Organisation User Registration
- Sign-in & 2FA Setup