

# ESOS- Energy Savings Opportunity Scheme

## High Level Guidance & Demonstration On :

1. User Account Set-up :
  - Responsible Undertaking user account
  - 2 Factor Authentication (2FA) set-up
2. Organisation Account : Review & confirm the preloaded organisation information
  - Organisation registration number - Pre-loaded
  - Organisation Name & Address - Populated automatically from Companies House

### **Important Note:**

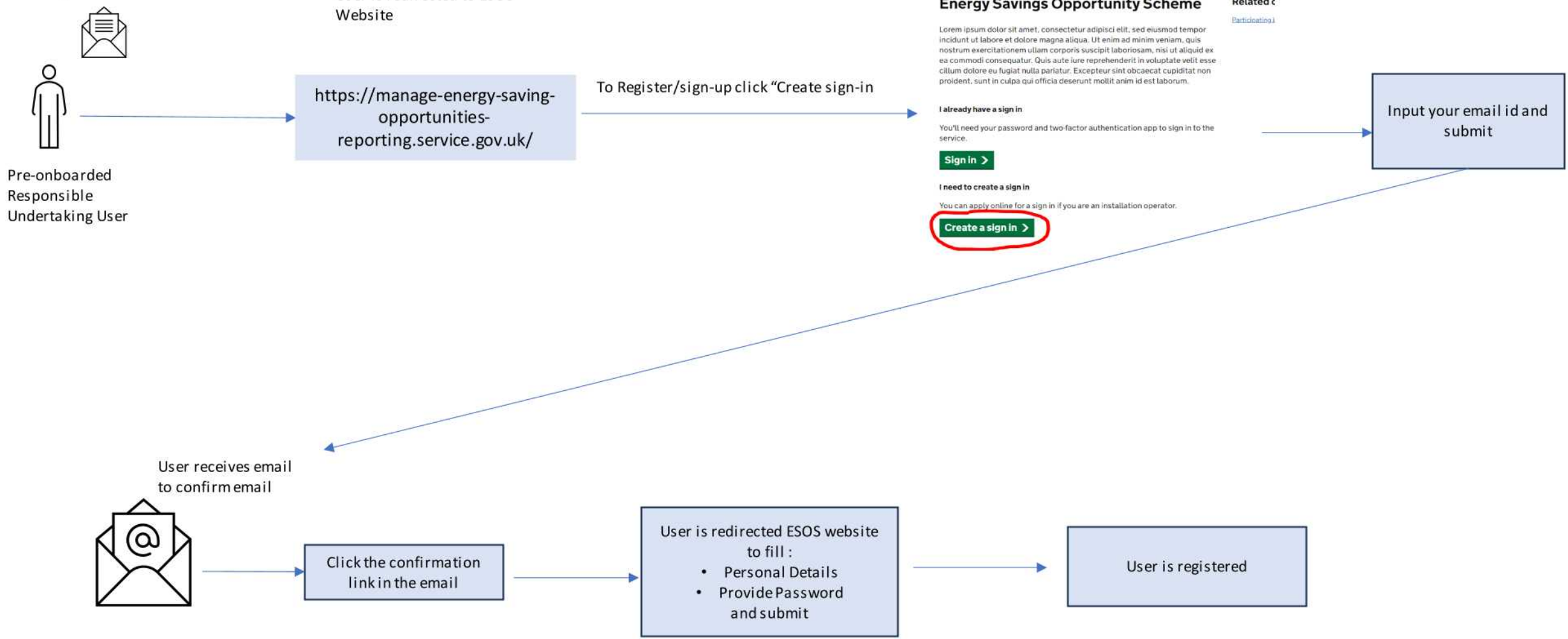
3. Once user account is set-up
  - Ensure that you don't forget your password AND lose the 2FA both at the same time.
  - You need either of them to reset the other
  - If you lose both, contact ESOS IT help desk: [esos-it@environment-agency.gov.uk](mailto:esos-it@environment-agency.gov.uk)
4. Organisation Location:
  - The organisation location is by default selected as ENGLAND.
  - Choose the appropriate location of from the list ( England, Wales, Scotland, Northern Ireland and Offshore)

## Step by step demonstration on how Responsible Undertaking users can set-up their user account & confirm their organisation account

Step #	User Actions
<p><b>Step 1 :</b></p> <p><b>Pre-requisite: Set-up 2FA</b></p> <p><b>(2 Factor Authenticator)</b></p>	<p>Download any of 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"> <li>▪ Free OPT</li> <li>▪ Microsoft</li> <li>▪ Google</li> <li>▪ OKTA</li> <li>▪ SendGrid (Authy)</li> </ul> <p><b><u>Guidance Note:</u></b></p> <p>Refer to the Guidance Material &amp; video provide separately</p>
<p><b>Step 2 :</b></p> <p><b>User Account Sign-up /registration</b></p>	<ul style="list-style-type: none"> <li>▪ Receive a sign-up email with a sign-in link</li> <li>▪ As instructed, input your email id &amp; Submit → Receive an email to confirm email .</li> <li>▪ Provide your details, set-up password</li> <li>▪ Create your account</li> </ul>
<p><b>Step 3</b></p> <p><b>Set-up 2FA</b></p> <p><b>( 2 Factor Authenticator) Set-up</b></p>	<ul style="list-style-type: none"> <li>▪ Login with your credentials</li> <li>▪ System displays QR Code ( QR code is displayed only for new user or when 2FA code is reset)</li> <li>▪ Scan the QR code using the authenticator app on your mobile</li> <li>▪ Generate 6 Digit code and Set-up 2FA</li> </ul>
<p><b>Step 4</b></p> <p><b>Organisation Account</b></p>	<ul style="list-style-type: none"> <li>▪ Login ( if not logged in already)</li> <li>▪ Click Apply for Organisation Account</li> <li>▪ Company registration number is pre-populated.</li> <li>▪ Verify the Name, Address, SIC code details . (Update as necessary )</li> <li>▪ Select the appropriate location of the registered address ( England, Wales, Scotland, Northern Ireland and Offshore)</li> <li>▪ Submit the account</li> </ul>
<p><b>Step 5: Account search</b></p>	<ul style="list-style-type: none"> <li>▪ Login ( If Not logged in already)</li> <li>▪ Access the “Account” section</li> <li>▪ Organisation Accounts are listed ( if 2 or more exists, all accounts will be listed)</li> <li>▪ Choose and click any account to see organisation details.</li> </ul>

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

- Receive a sign-up email with sign-in link. Click the link



User is redirected to ESOS Website

https://manage-energy-saving-opportunities-reporting.service.gov.uk/

To Register/sign-up click "Create sign-in"

## Energy Savings Opportunity Scheme

Related c  
[Participating](#)

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### I already have a sign in

You'll need your password and two factor authentication app to sign in to the service.

[Sign In >](#)

### I need to create a sign in

You can apply online for a sign in if you are an installation operator.

[Create a sign in >](#)

Input your email id and submit

User receives email to confirm email



Click the confirmation link in the email

User is redirected ESOS website to fill :

- Personal Details
- Provide Password and submit

User is registered

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

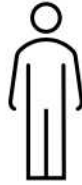
## Pre-requisite :

1. User have 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: Visual Flow of Organisation Account : Review and Submit

