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**	Download any of the following 5 authenticator apps either on your iPhone/Android mobile or add browser add-on. You will need the authenticator app to set-up your 2FA •Free OPT •Microsoft •Google •OKTA •SendGrid (Authy) **<u>Guidance Note:</u>** Refer to the Guidance material & video provided separately
Step 2 : **User Sign-up /registration**	▪ 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**	▪ 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**	▪ 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	▪ 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)**	▪ 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

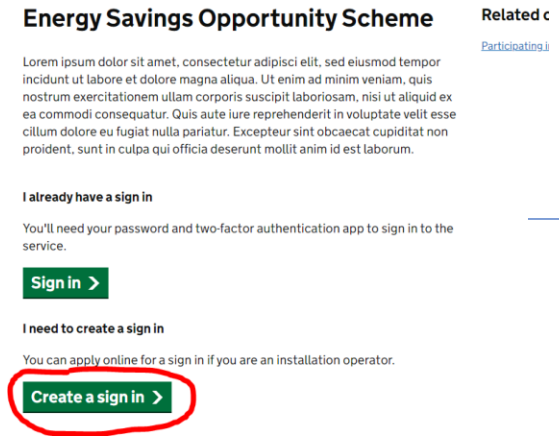
Step 2: User Account Set-up – Visual flow of the User account set-up process

Visit the ESOS Website

Responsible Undertaking User

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

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



As per instructions, provide email and submit

User receives email to confirm email

Click the confirmation link in the email

User is redirected to fill :
- Personal Details
- Provide Password and submit

User is registered

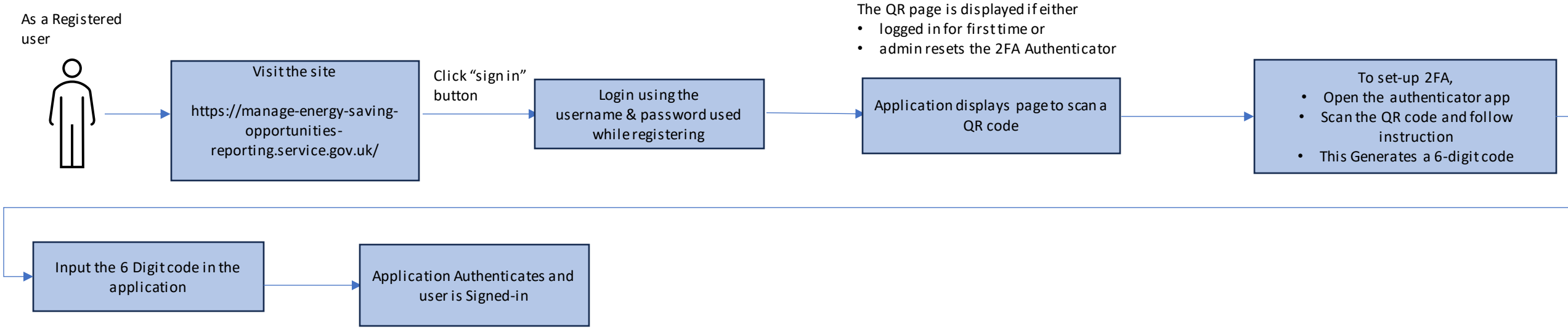
Step 3: Visual flow of Sign-in and 2FA(2Factor Authentication)

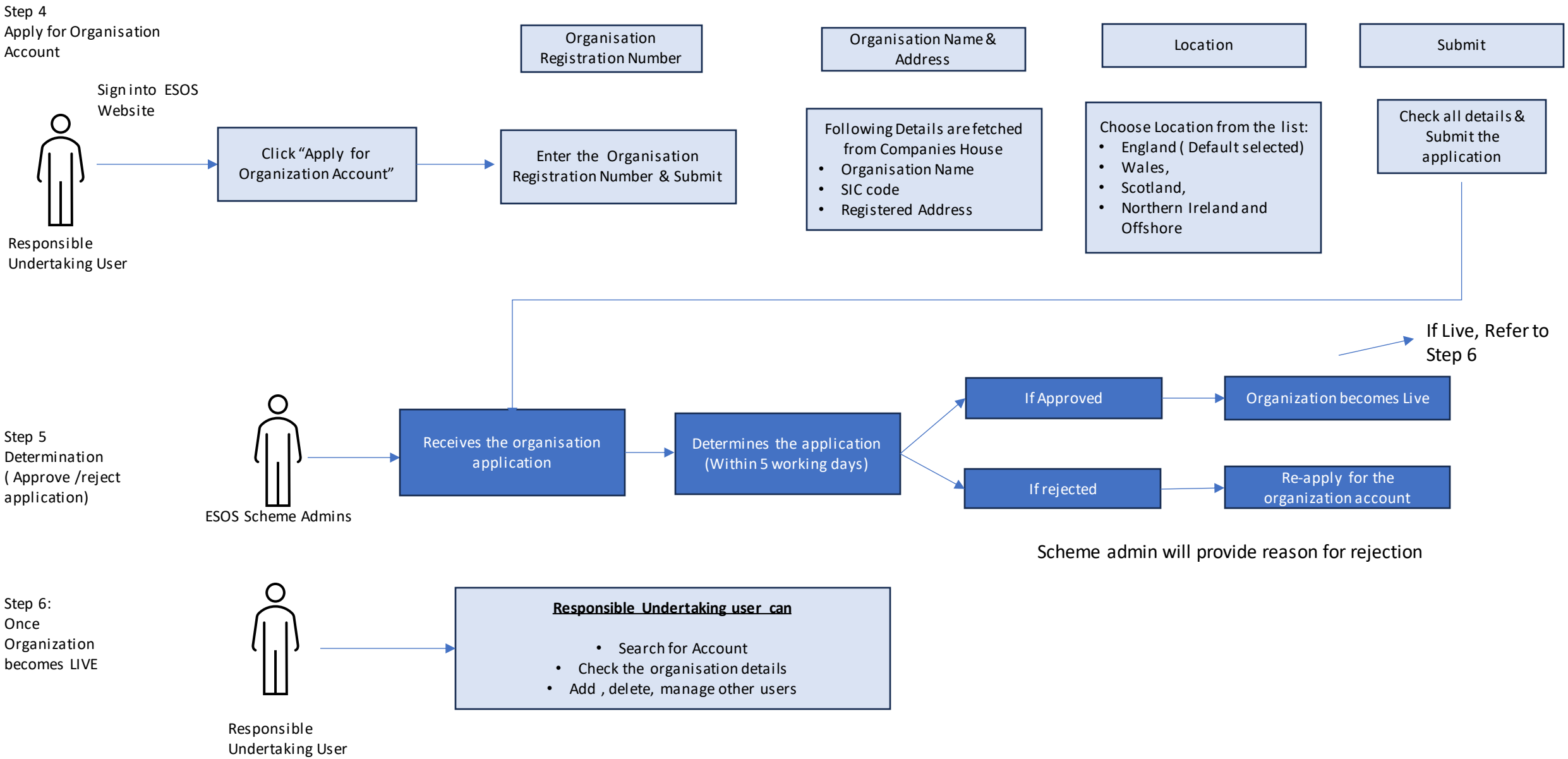
Pre-requisite :

1. User 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)



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