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

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
Step 1 : **Pre-requisite: Set-up 2FA** **(2 Factor Authenticator)**	Download any of 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) **Guidance Note:** Refer to the Guidance Material & video provide separately
Step 2 : **User Account Sign-up /registration**	▪ Receive a sign-up email with a sign-in link ▪ As instructed, input your email id & Submit → Receive an email to confirm 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 on your mobile ▪ Generate 6 Digit code and Set-up 2FA
Step 4 **Organisation Account**	▪ Login (if not logged in already) ▪ Click Apply for Organisation Account ▪ Company registration number is pre-populated. ▪ Verify the Name, Address, SIC code details . (Update as necessary) ▪ Select the appropriate location of the registered address (England, Wales, Scotland, Northern Ireland and Offshore) ▪ Submit the account
Step 5: Account search	▪ Login (If Not logged in already) ▪ 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

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

Pre-onboarded Responsible Undertaking User
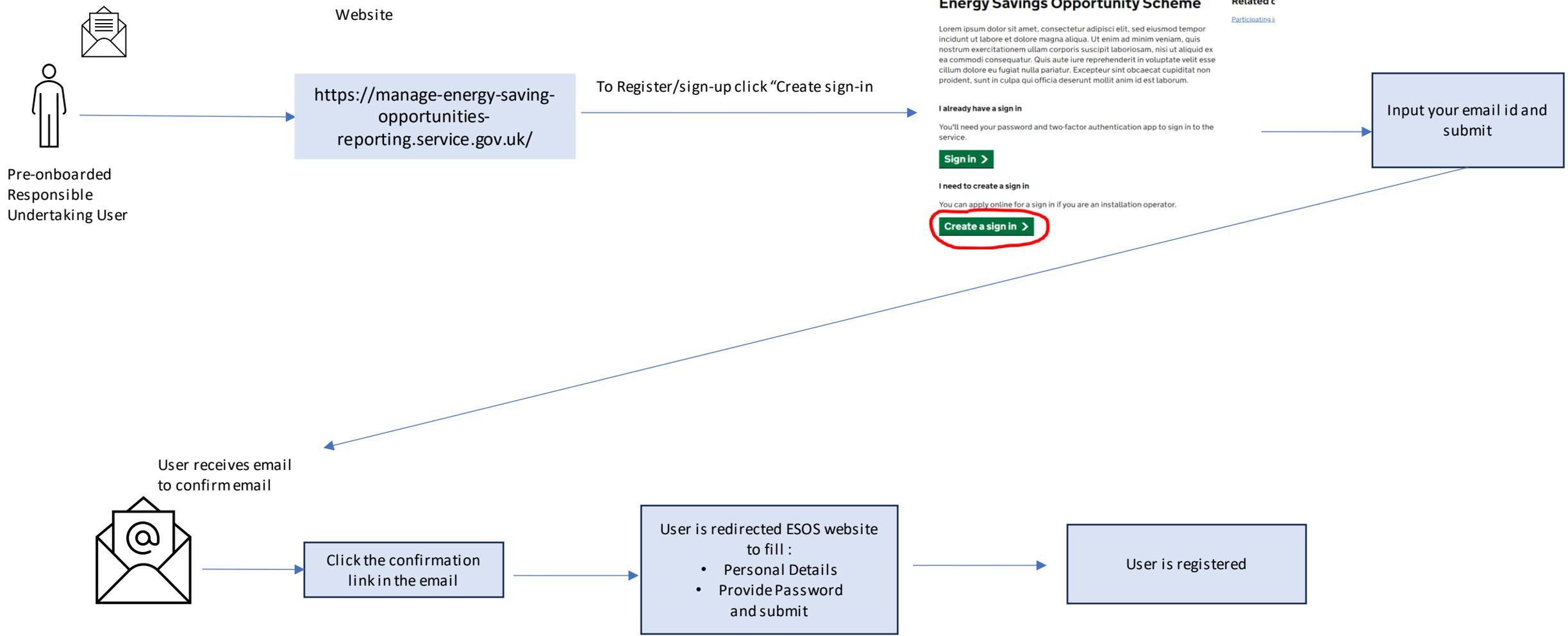
User is redirected to ESOS Website

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

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

Energy Savings Opportunity Scheme

Related c

Participating i

Lorem ipsum dolor sit amet, consectetur adipisci elit, sed eiusmod tempor incidunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrum exercitationem ullam corporis suscipit laboriosam, nisi ut aliquid ex ea commodi consequatur. Quis aute iure reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint obcaecat cupiditat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.

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
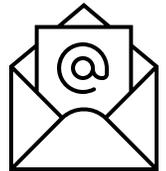
Click the confirmation link in the email

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

The QR page is displayed if either
- logged in for first time or
- admin resets the 2FA Authenticator

| Visit the site https://manage-energy-saving-opportunities-reporting.service.gov.uk/ | Click "sign in" button → | Login using the username & password used while registering | 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

Responsible Undertaking User

Visit ESOS Website

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

Login to the ESOS Website

Click " Apply for an Organisation Account"

Organisation Registration Number

Company Registration is pre-loaded

Check Details & continue

Check Details , update if necessary & continue

Organisation Name & Address

Organisation details from Companies House are pre-loaded

- Organisation Name
  - SIC Codes
    - Address

Choose location & Continue

Organisation Registered Location

Choose Location

Default is set to ENGLAND.

Select appropriate Location from the list:

- England,
- Wales,
- Scotland,
- Northern Ireland and Offshore

Check your Answers & Submit

- Check all details ,
- Change as necessary and
- Submit

Click "Account" section at top of the page

The Organization account will be listed