

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

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

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

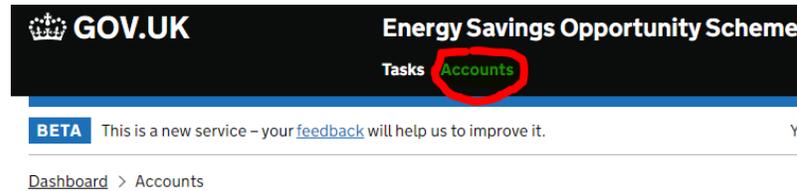
**Pre-requisite:** Organization Account is approved.

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

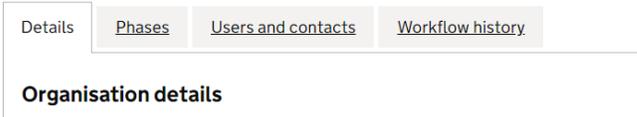
**AL Test Organization 1**  
ORG000001

This will display all  
organisation details

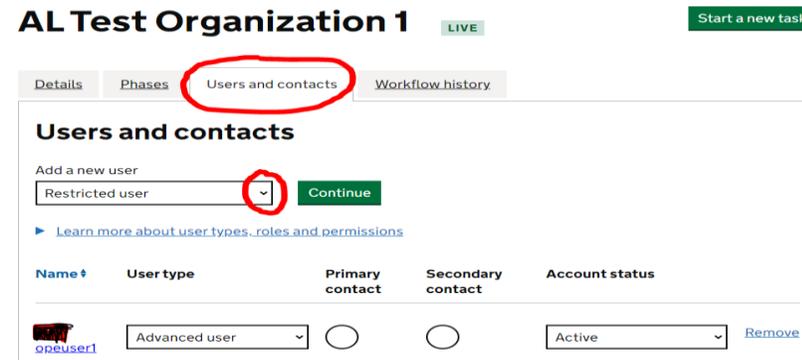
Click on the  
organization

## AL Test Organization 1

LIVE



Select User and contact's tab



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

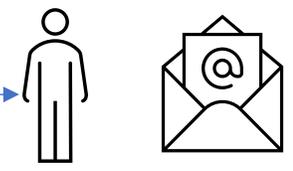
Last name

Enter the email address they use to access the service

Submit

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