



USER GUIDE

For Third Party Users

How do I...?

- [Login](#)
- [Reset My Password](#)
- [Search for Information](#)
- [Refine my results](#)
- [Filter my search results](#)
- [View the MPAN Page and Restricted MPAN Data](#)
- [Set my user specific display settings](#)
- [Manage my user account details](#)

What is/are...?

- [Those 'No Entry' Signs](#)
- [Market Sector Indicators](#)
- [Those Icons found on the results screen](#)
- [Postcards/Postcard flipper](#)

Master Admin User Functions

- [Managing Users](#)
- [Amending User Roles](#)
- [Managing Email Domains](#)
- [MAU Transfer](#)

Change History:

Version Number	Status	Date of Issue	Reason for Change
1.0	Issued	21/11/2019	Previous version finalised and issued
1.1	Draft	23/10/2020	Change history added to document. Changes as per November 2020 release of ECOES (v6.1) and detailed updates to entire document. Passed to K.H for initial review. (D.E)
1.1	Draft	29/10/2020	Reviewed (K.H) Passed to A.B for final review (D.E)
1.1	Issued	30/10/2020	Finalised (A.B)
1.2	Draft	02/02/2021	Review and update to restricted access and User Reports section (DE)
1.2	Draft	04/02/2021	Reviewed (KH) Passed to A.B for review (DE)
1.2	Issued	05/02/2021	Issued as per ECOES release 6.2. (A.B)

Document Controls:

Name	Responsibility	Date
Authorisation:		
D. Edwards	Draft finalised following internal testing completion and issued for final internal review.	04/02/2021
A. Bard	Final Review.	04/02/2021

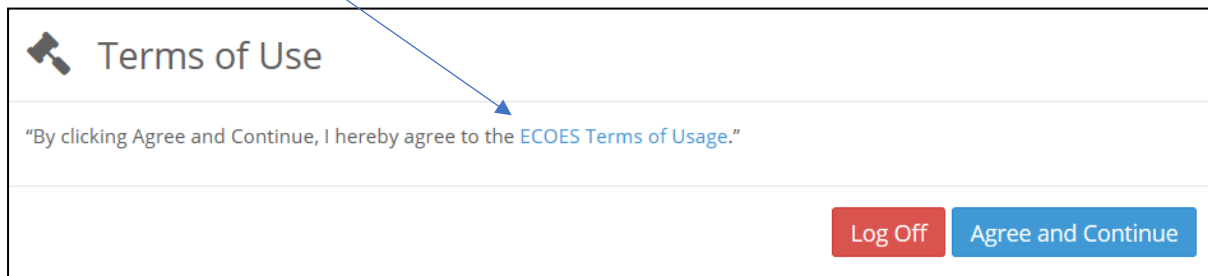
Circulation:

Version Number	Reason for Issue
1.2	Finalised for ECOES release 6.2.

Login to ECOES

Users should open the ECOES web browser <https://www.ecoes.co.uk/> and enter in their Username and Password. Then click 'Log on'.

All users of ECOES must agree to the Terms of Usage of the system upon each session login. When logging in, users will be presented with a session login screen that requires them to positively confirm that they agree to the Terms of Usage of ECOES (as defined and visible when clicking on the blue 'ECOES Terms of Usage'.



The User will have the option at this point, to log off (if they disagree with the terms of use) or agree and continue (if they agree to the terms of use).

Forgotten Password

To reset your password, follow these steps:

1. Click the 'Forgot your password' link on the login screen.
2. Enter your username.
3. Either:
 - a. Answer your memorable questions; or
 - b. Click the 'I would like to reset my password via email' link (if email set)
4. Reset Password ensuring you conform to the password strength rules.
5. If you reset your password via email you must also reset your memorable questions/answers.

A user can also reset their password once logged in via the [My Account](#) page.

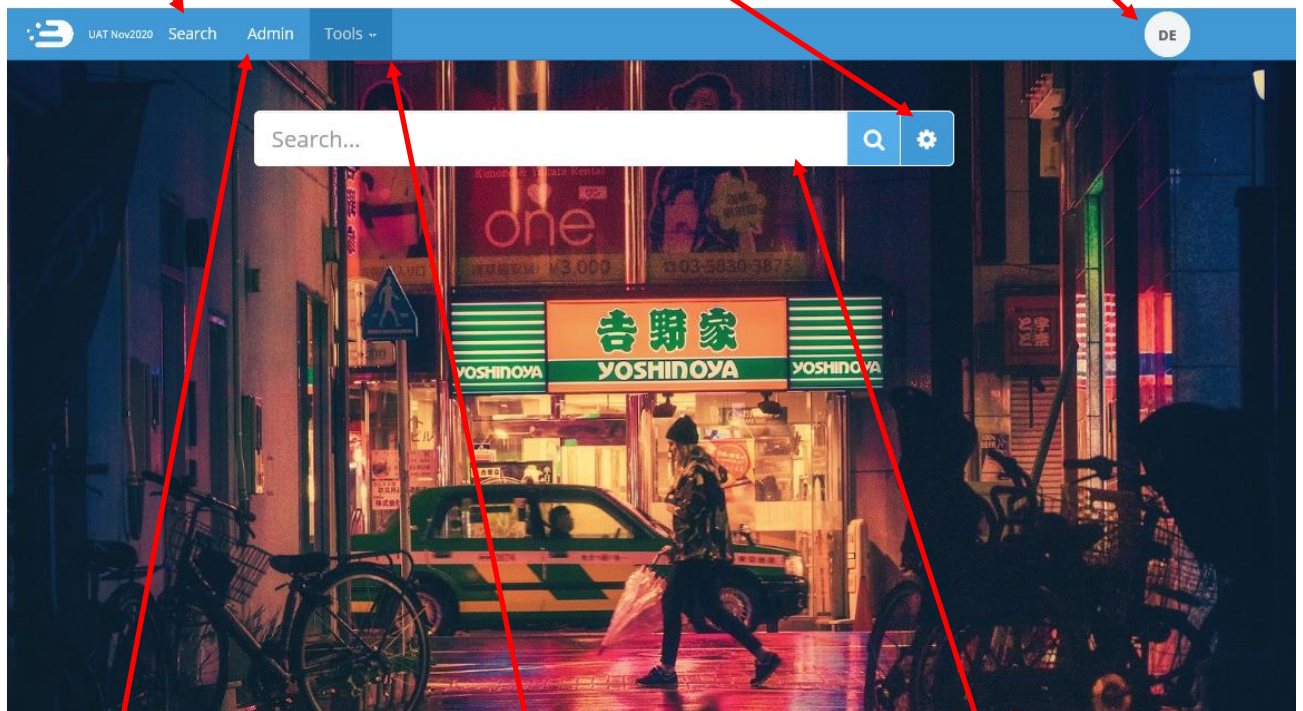
If you require a password re-set, but the email used is not a proxy email and not configured to deliver or redirect received emails to your primary email address, then any password re-set will need to be requested by emailing support.ECOES@gemserv.com.

Primary Search

Search/Homepage – clicking this will take the user back to the ECOES Homepage.

My Settings – this dropdown will allow the user to access their display settings – find out more [here](#).

My Details – this dropdown will allow the user to access their account details – find out more [here](#).



Admin – this screen will show details of the users' company group (e.g. who the MAU is). Users who have user management privileges will be able to reset passwords and create users from this page.

Tools – Allows Users with relevant permissions to access User Reports.

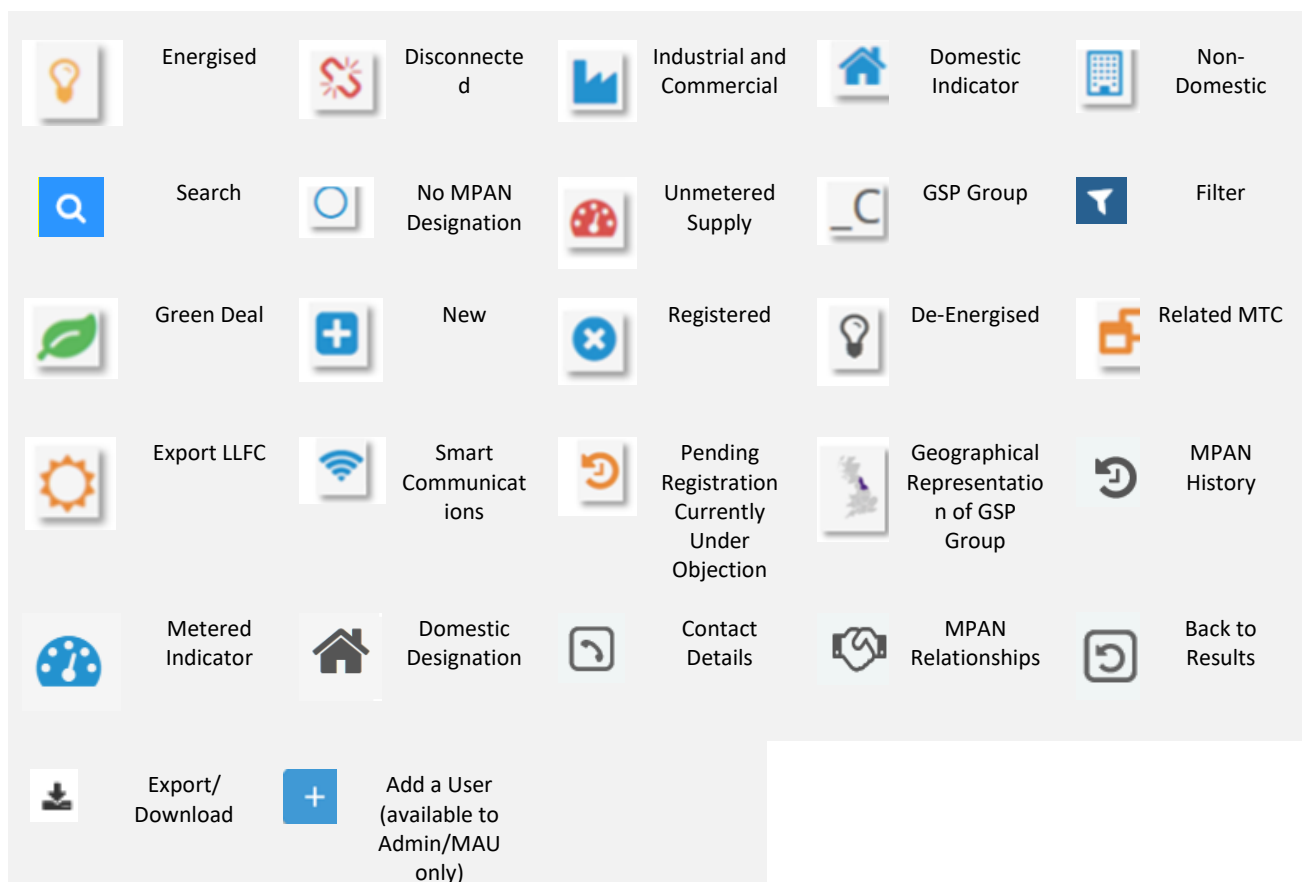
Search field: in ECOES this is a 'Universal Search' function (similar to internet search engines). Users will be able to search for addresses, partial addresses, postcodes, MPANs, MSNs, multiple MPANs, multiple addresses or a combination. ECOES users are limited to 600 MPAN views per day, once this limit is reached further searches are prohibited.

My Account

Users can manage their user account details via the 'My Account' page found by hovering their mouse over the circular icon in the top right of the ECOES page. This is also where a user can logout. A user can perform the following tasks in this page:

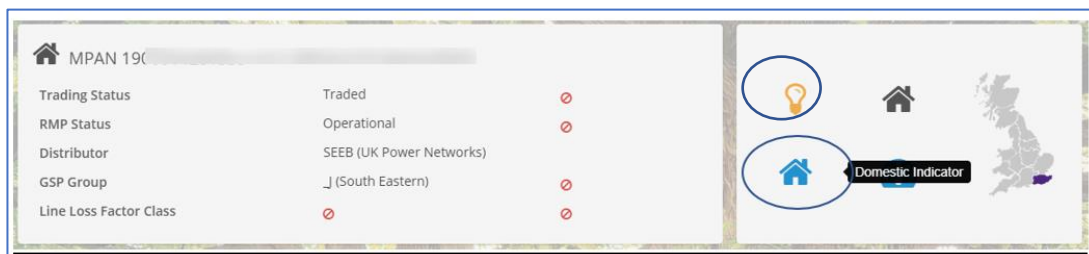
- Amend Account Information
- Reset their password
- Amend their memorable questions/answers for password resets.
- View remaining MPAN Views for that day
- Change the background colour of ECOES

Icon Identification:

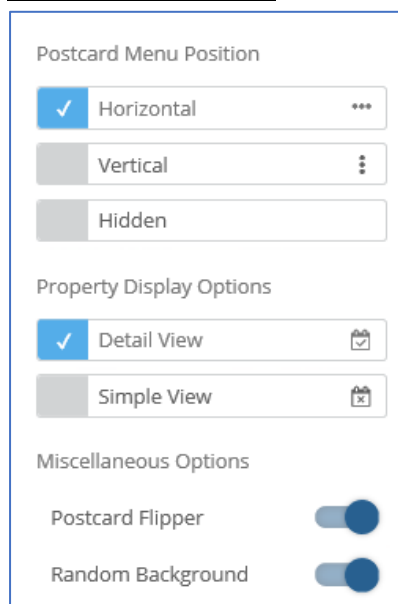


Market Sector Indicators

When viewing an MPANs, an indicator will be present to reflect the Market Sector of that MPAN (as defined in the Icon Identification above.) In the example below, the MPAN is domestic and energised.



Display Settings



A user can choose how they view data within ECOES. To open the settings options, click on the settings icon, found to the right of search box (⚙️).

You can choose where 'Postcards' are positioned, whether to hide postcards, or to allow the postcard to 'flip' or not - a flipping postcard will show additional information when a mouse is hovered over it. A user can choose to remove 'random background' which is also pre-set.

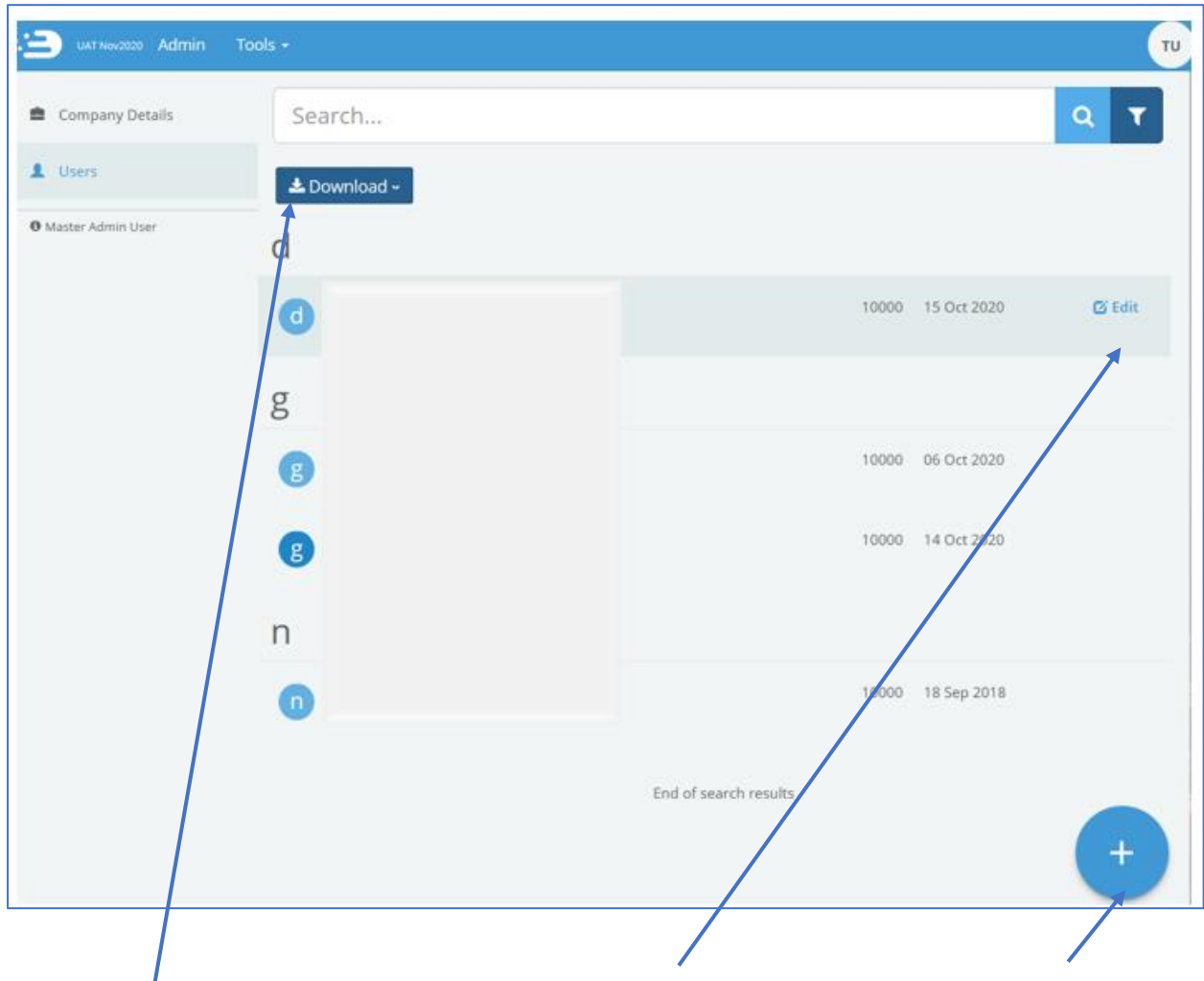
A user can also decide whether to see a 'Detailed' or 'Simple' view - the simple view will remove the dates related to some Data Items allowing more information to be shown on one screen without having to scroll.

Managing Email Domains – Only available to the MAU

Email domains are a security feature for ECOES organisations to ensure only valid Username/Email Addresses are used, e.g. MRASCo CAS will only allow their users to have an '@gemserv.com' username/email address. An organisation can have **multiple email domains or none**. Whenever a new user is being created, and the organisation has a domain(s) setup, the username will only be able to have a valid email domain.

Managing Users – Only available to relevant users (MAU and User Admin roles)

Clicking on the Users option on the left of the Admin page will show users with relevant privileges all the users within their organisation. This is also where 'User' Reports can be found.



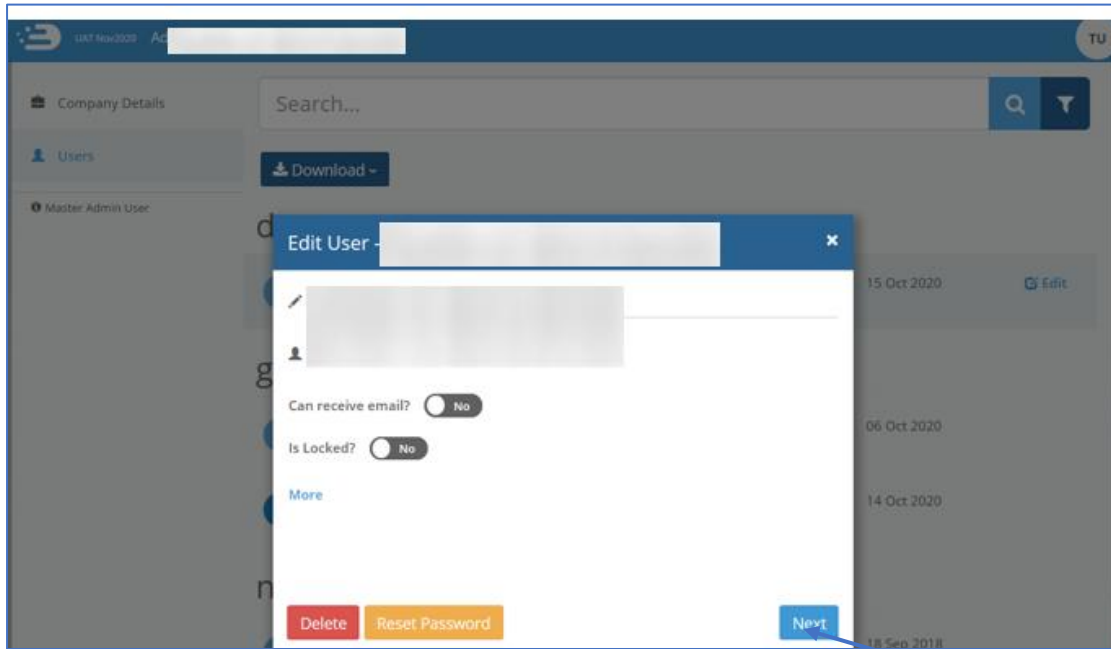
Clicking 'Download' will allow MAU and Admin users to download all the users of a company group into a report containing user details e.g. last login date.

Clicking on the 'Edit' button when hovering over a specific user will open the user's profile. The MAU can unlock user accounts, reset a user's password, delete a user, amend user account information grant, or revoke access to certain ECOES permissions.

To create a new user, click on the 'Plus' icon. This will open a blank user profile, identical to the way that edit user is displayed.

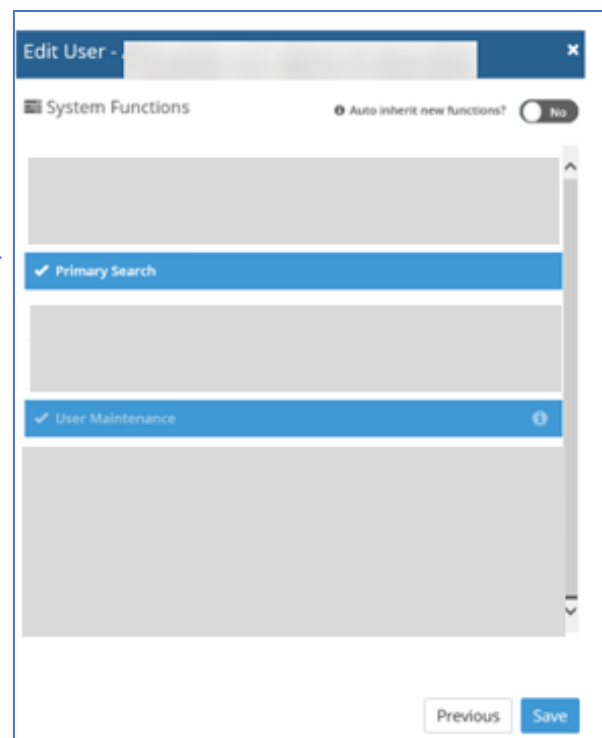
Amending User Roles

Users with the relevant privileges (MAU and User Admin Roles) can amend what functions other users within their company group have access to. To do this open a user account within <https://www.ecoes.co.uk/Admin/User> by clicking on 'Edit' within that users line.



To view and amend what system functions a user has access to click on the 'Next' button.

This page lists what functions are available to each user. Here you can tick/untick as applicable. A blue highlight indicates functions that have been selected.



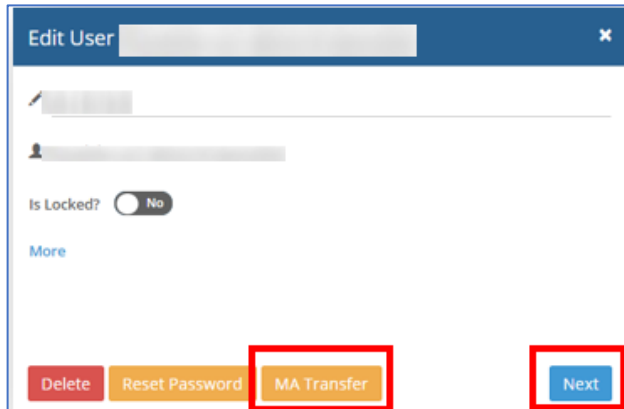
Once you click 'save', you will return to the main 'Users' page and a pop up on the bottom right of the page will confirm that this user's system functions have been saved.



Transferring MAU to another user

1. The user you are wishing to transfer the MAU privilege to must already have a user account and:

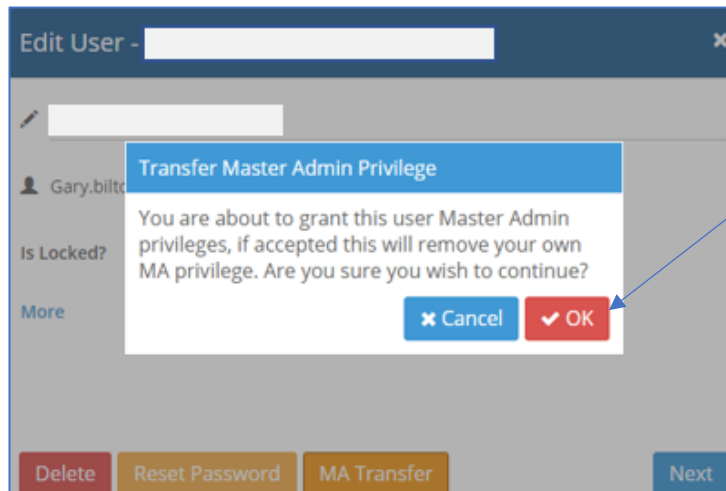
- have a valid email address as their username.
- must have a phone number populated (found in the 'more' section).



If the new MAU does not have one of the above the MA Transfer button/option will not be shown.

You must add these details and 'save' the user account, when re-opening the user account, the MA Transfer button/option will be shown.

2. Click the MA Transfer Button, this will open a pop-up, asking you to confirm or cancel the change.



Clicking OK will generate an email to the prospective MAU.

3. The prospective MAU must click on the link in the email which will take them to the login screen. Once logged in they will see a MAU Transfer request on their 'My Details' page, within 'My Account'.

User Reports

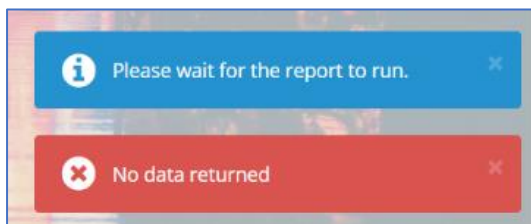
Two reports are available to download for users with relevant privileges. They can request reports regarding the behaviour of their users, these reports will only be available to be download once logged into the system.

All available reports can be found within 'Tools' drop down and the 'User Reports' functionality can be accessed by clicking on.



This function allows MAUs of a company group, and those with access to User Reports to generate two User reports detailing meter search details for all the users within their company group, reports are delivered in CSV format.

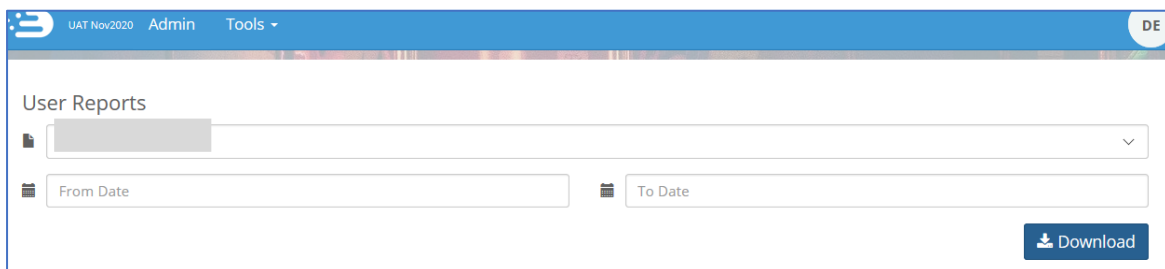
Once you click on Download, a pop up will advise you to please wait for the report to run. If a report is not available for your chosen timeframe, the system will notify you like so.



If a report exists, a pop up will ask you if you wish to open, save, or cancel the report download.

1. User summary report

The Summary report lists details for each user that has made searches in a user configurable time period, where an MPAN has been selected. The report shall display all the user details as in the User Detail Report, but only display totals instead of information about the specific reports.



2. User details report

The User Details report lists all MPAN Searches that have been performed during a certain period of time. The search can be for a specific user (by entering a username in the search parameters), or if no username is entered, for an entire company group.

As this report lists all MPAN searches we would recommend restricting the time periods when doing reports for a company group.

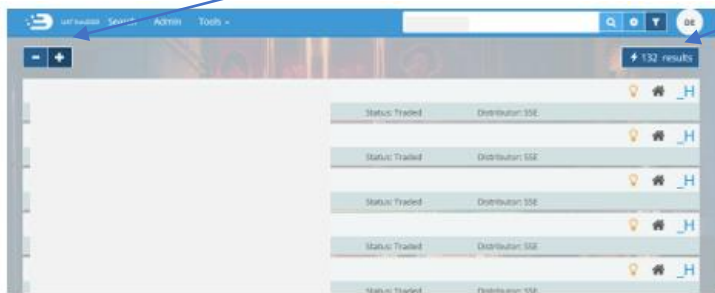
It shall provide the following information:

- Supplier and address of the MPAN viewed.
- User detail information such as the e-mail address, phone number and fax number, place of work for both the user and the line manager. (If these are filled in by the users' administrator).

The screenshot shows the 'User Reports' interface. At the top, there is a navigation bar with 'UAT Nov2020', 'Admin', and 'Tools'. On the right, there is a language selector 'DE'. Below the navigation bar, the 'User Reports' section contains a dropdown menu for user selection, two date input fields labeled 'From Date' and 'To Date', and a 'Username' input field. A 'Download' button with a download icon is located at the bottom right of the form.

Refining Results

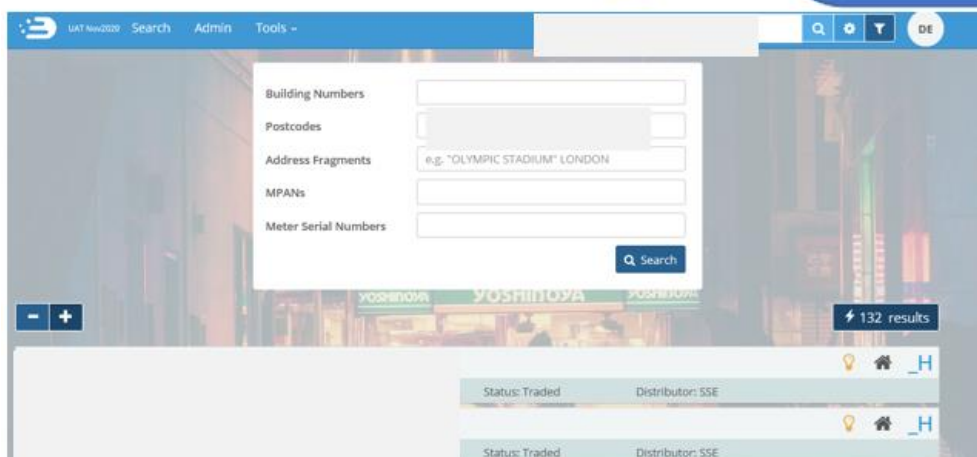
MPAN search results can be further refined by using either the plus and minus icons, or the lightning bolt icon, as described below.



Some searches return more results than expected.

The plus and minus buttons at the top left of the results screen will provide a detailed view when plus is selected (as in the screenshot) or a minimal view when minus is selected.

For an advanced search, click on the lightning bolt icon (top right of results screen) to expand the more detailed search criteria box. Then you can free type in any extra details and click on search.



Filtering Results



To include/exclude certain MPAN attributes from the search results, you can click the 'Filter' icon (🔽) to the right of the search bar which will expand the filter options.

The filter icon will move side-to-side to indicate that a filter is applied.

If you navigate away from the current search page (e.g. back to the homepage or to your account details page), the filter settings will be reset to include all attributes.

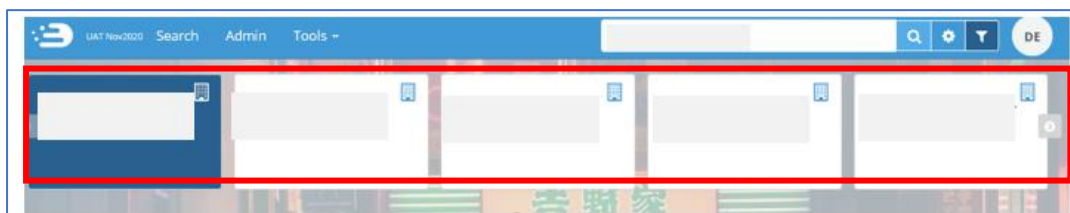
If your filter excludes all results, ECOES will advise you with the following pop up.



MPAN page and Restricted Data

Postcards/Postcard flipper

Searching by postcode will usually result in 'Postcards' being visible within the MPAN record. Postcards (highlighted in the red box below) are designed to allow users to quickly view another search result without needing to navigate back to the results page.



The number of postcards depends on how many search results you had; if your original search yielded 4 results then there will be 4 postcards that can be scrolled through. If your search yielded 1 result, then no postcards will be present.

Hovering over a Postcard will rotate it to display MPAN, GSP Group, Status and Distributor. Clicking on a postcard will open that MPAN page.

Restricted Access

Users with restricted access, will be unable to view all details associated with that MPAN. Whether a Data Item restriction applies will depend on your Organisation's Industry Role and/or how they and other ECOES organisations have setup their access rules. MEC approved third parties will have restricted access to certain Data Items as determined by MEC and defined in

their Access Agreement. A summary of what Data Items are returned and what Data Item restrictions may be in place can be found in section 15.6 of the [ECOES URS](#).

Price Comparison Website (PCW) users are only allowed to view industry data for Domestic Meters, and therefore ECOES will only return data for Meters with Profile Classes 1 and 2. Restricted access MPAN page looks like this.



The 'no entry' sign indicates that those specific Data Items are restricted. You will not be able to view these items.



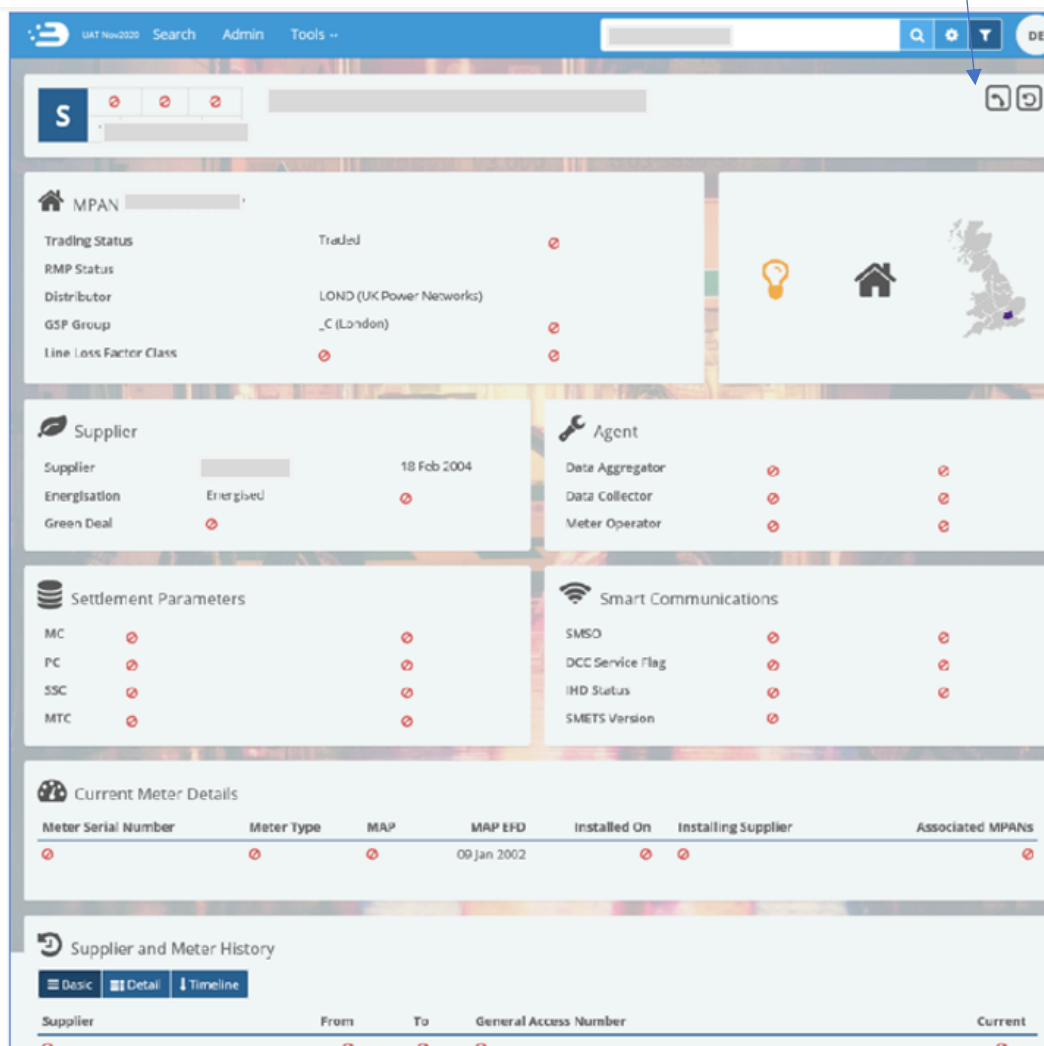
Hover the cursor over the 'Supply' icon to show date the data was last updated and by whom.



Click the contact button to open a pop-up containing the contact details of Distributor and MPAS associated with the MPAN.



Click the 'Back' icon to take you back to the main search results.



At the lower part of the MPAN detail page, users with access are able to view additional information regarding the MPAN, such as:

- Current and historical Meter details
- MOp and Supplier history, and
- Links and details relating to associated MPANs (if any).