TAX SYSTEMS

MTD Compliance Portal
User Management Guide

Version 4.3

For System Administrators and Superusers

Contents

1. Introduction

About this Guide

This guide is aimed at users who have been assigned the System Administrator or Superuser roles. It is designed to help you familiarise yourself with the User Management features of the MDT Compliance Portal and includes:

- An overview of the user management feature
- How to set up user roles and permissions
- How to add, edit and delete additional users of the portal

Technical Support

We provide a technical support help desk for users requiring assistance. The help desk can be contacted by telephone between the hours of 9.00 am and 5.30 pm, Monday to Friday excluding public holidays.

If you require help or further information, please contact the support team on:		
UK:	Tel: +44(0) 1784 777 666	**Email:** support@taxsystems.com
Ireland:	Tel: +353 (0) 1661 9976	**Email:** support@taxsystems.ie

2. User management overview

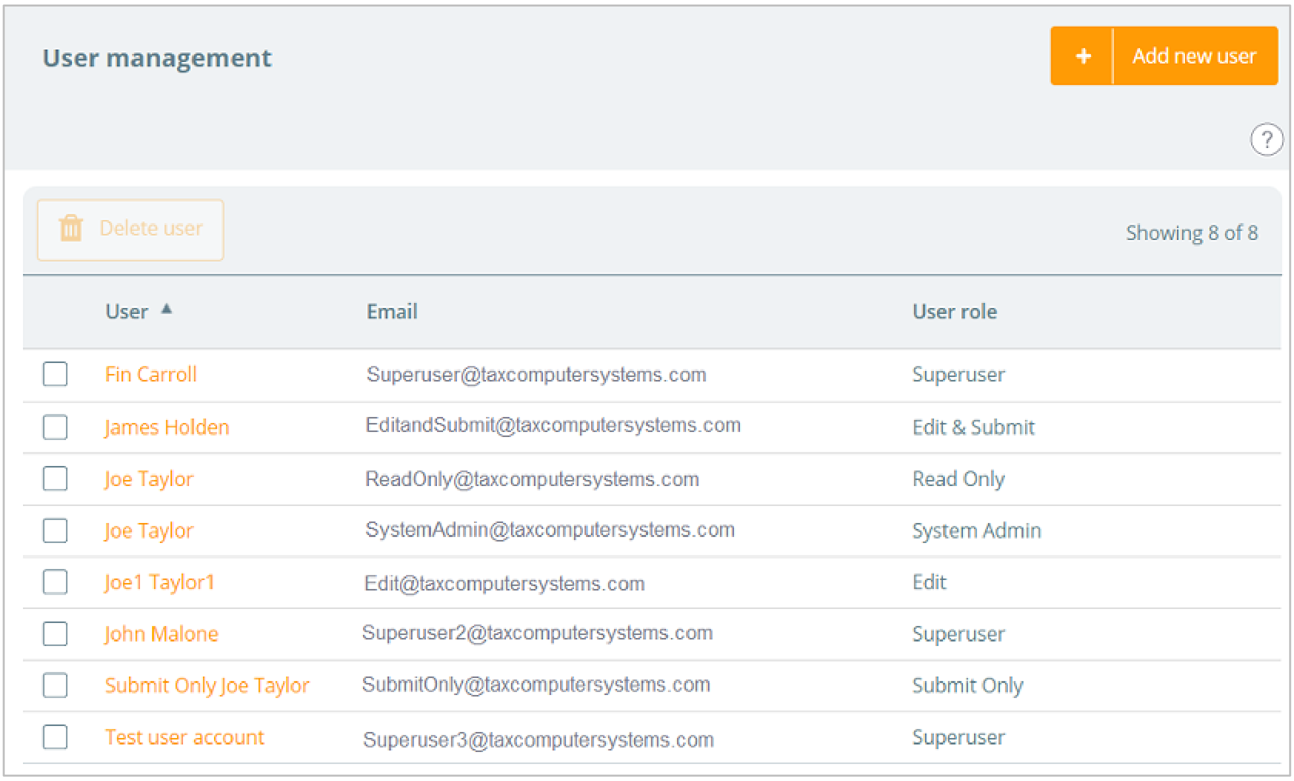
The User management feature allows the Administrator and Superuser to add, edit and delete other users of the MTD Compliance Portal. It also allows each user to be assigned a specific role that will allocate the appropriate level of access they should have.

The user management screen

To access the User management options, click on the **User icon menu** in the top right-hand corner of the screen and select the **User management** option.

This will display the **User summary** screen which will provide a list of users that have access to the portal, including:

- Username (you can click on this to edit a user's details)
- Email address
- Role that has been assigned to the user



The system defaults to displaying users in alphabetical order from A – Z, via their Username. You can sort users by email address and user role by clicking on the heading name.

An orange arrow will appear next to the heading that you have sorted on, indicating whether items are displaying from A – Z or from Z to A.

User role descriptions

This column will display the role that each user has been assigned and this dictates the level of access they have and what they are allowed to do in the portal. The roles available are:

- **Superuser:** This role has access to all user management and entity management tasks and allows the user to prepare and submit VAT Returns.
- **System Admin:** This role has access to all user management tasks, along with the folder option tasks on the entity management screen. This allows the user to create, edit and delete other users of the portal, as well as being able to add, edit and delete folders and assign user access to folders.
- **Edit & Submit:** This role has access to all entity option tasks on the entity management screen and allows the user to prepare and submit VAT Returns.
- **Edit:** This role has access to all entity option tasks on the entity management screen and allows the user to prepare VAT Returns.
- **Submit only:** This role has access to view an entity's VAT Return summary details and submit the VAT Return.
- **Read only:** This role has access to view an entity's VAT Return summary.

Roles can only be assigned by Superusers and System Administrators. When creating a new user, its is important that you understand the level of access they will need so that they can be assigned the appropriate role.

See **Section 3** for a table detailing the specific functionality access for each role type.

3. Planning your user role structure

Berfore you begin creating users, it's a good idea to look at your current process, access restrictions in place for certain entities or groups and whether you already have established roles for who can perform different tasks relating to VAT Return submissions.

If you have a lot of users that require different access levels to the portal and/or you need to set up a more complex folder structure, its worth mapping it out on paper first. This will help you to visualise the folder structure, who should have access to each folder and what their user role should be, before you start setting it up on the MTD Compliance Portal. For more information about creating your folder structure, see the Folder Management Guide.

Allocating user roles

The following table outlines the different user roles and what actions they are able to perform.

	Roles					
Features/Actions	**Superuser**	**System Admin**	**Edit & Submit**	**Edit**	**Submit only**	**Read only**
User management	✓	✓				
Add user and assign user role	✓	✓				
Edit user/change user role	✓	✓				
Delete user	✓	✓				
Entity management	✓	✓	✓	✓	✓	✓
Folder options						
Add folder/subfolder	✓	✓	✗	✗	✗	✗
Delete folder/subfolder	✓	✓	✗	✗	✗	✗
Assign folder/entity access to users **	✓	✓	✗	✗	✗	✗
Move entity/folder	✓	✓	✓	✓	✓	✗
Entity options						
Add entity	✓	✗	✓	✓	✗	✗
Edit entity	✓	✗	✓	✓	✗	✗
Delete entity	✓	✗	✓	✓	✗	✗
Authorise	✓	✗	✓	✓	✗	✗
Download AlphaBridge template	✓	✗	✓	✓	✗	✗
Submit VAT Return	✓	✗	✓	✗	✓	✗

** Folder access is further determined by the role that the user has been assigned.

If you do not need to restrict what your users are able do and see, then you can assign them all the Superuser role. However, you should bear in mind that they will have the ability to create other users, change the roles of existing users, change the folder structure and set folder permissions.

If you want to maintain more control over how/when the folder structure is changed and the access that users have to certain folders/entities or to performing certain tasks, then you should consider allocating a smaller number of Superuser roles and choosing one of the the other roles types for the majority of your users.

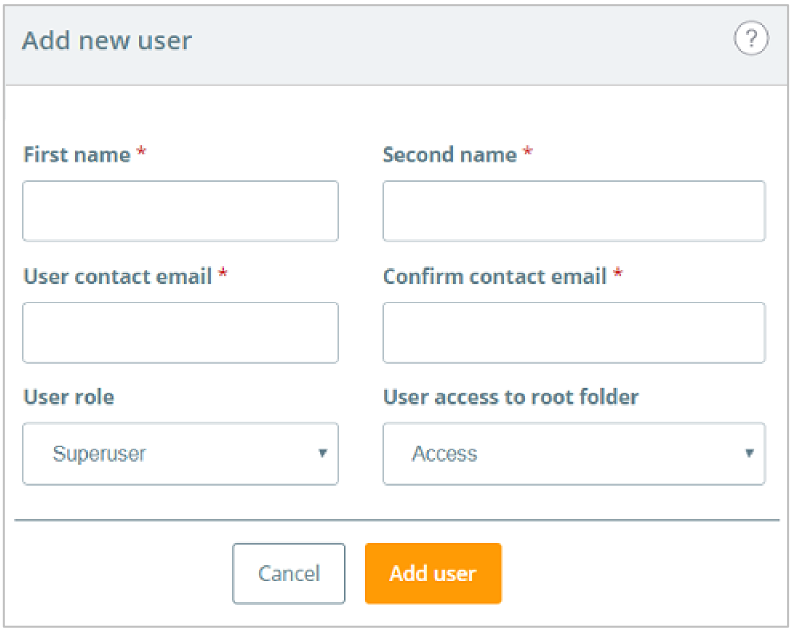
When you create a new user, you can also decide whether or not the user has access to the root folder. This is the main folder that will have been created for you by Tax Systems and is the one that all additional folders are created under.

4. User management options

Add a new user

You can add any number of users so that they can access the portal to create entities and prepare their VAT Returns for submission to HMRC. You can define each user's access to the portal, by selecting the appropriate role they should be given.

1. From the User Management screen, click on the **Add new user** button and the Add a new user dialog will appear.



2. All fields marked with an asterisk are **mandatory**. Fill in these details for your new user.

   Note: *Care should be taken when typing in the user's email address, since this cannot be changed once you have created the user. If you make a mistake, you will need to delete the user and add them again.*

3. The user role defaults to **Superuser**. To change this, click on the **drop-down list** and **select the role** you would like to assign.

4. Choose the access level the user should have to the root folder. The default option is set to **Access**. You can change this by clicking on the **drop-down list** and **selecting No access**.

5. Click on the **Add user** button to confirm or press **Cancel** is you do not wish to proceed.

Edit an existing user

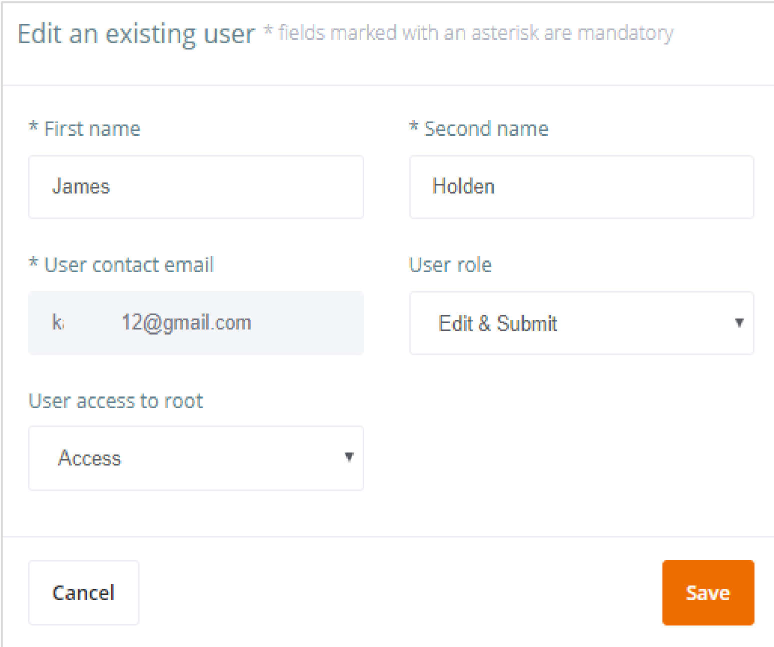
You can edit the user's First name, Second name, change their role type and their access to the root folder, but you **cannot edit the user's email address**.

If you have input an incorrect email address for a user, you will need to **delete** the user and **add** them in again.

1. To edit an exisiting user's details, click on the **user's name**.

2. The *Edit an existing user* screen will appear allowing you to change the user's **first name**, **second name**, the **role** type they have been assigned and their access to the **root folder**.

3. Once you have made your changes, click on **Save** to confirm or press **Cancel** is you do not wish to proceed.



Delete a user

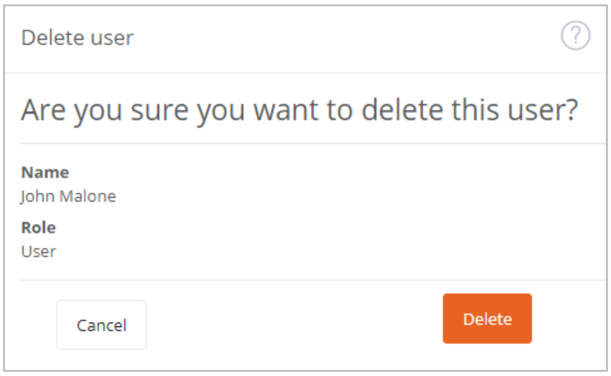
Should an existing user leave, no longer require access to the portal or has been created in error, then you can delete them and remove their access to the portal.

***Note**: Users that have been assigned the System Admin and Superuser roles will **only** be able to edit their user name details. They will not have the ability to **delete themselves**.*

1. Click on the **Check box** next to the user's name.

2. The **Delete user** button is now activated.

3. Click on the **Delete** button and the Delete *user* screen will appear.
4. To confirm your deletion, click on the **Delete** button or press **Cancel** if you do not want to proceed.



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