SETS Account Administrator
User Guide

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For help and support please:

- Visit the Revenue Scotland website – www.revenue.scot
- Telephone the Support Desk – 03000 200 310

1. Account Administrator – role and function

Account Administrator

The 'Account Administrator' plays an important administrative role in routine, day to day operation of SETS (the Scottish Electronic Tax System).

Every Organisation using SETS should have at least one person acting as Account Administrator, nominated by the Organisation to act on its behalf in relation to SETS.

When registering as an Organisation, the first person to login to SETS will automatically be assigned the role of Account Administrator. This person may appoint additional account administrators.

The Account Administrator shall:
- be responsible for the creation of Users (including additional administrators) for its Organisation and may authorise one or more Users to use SETS
- ensure that the information provided to Revenue Scotland about the Organisation and its Users is true, accurate, current and complete and that such information (including names, address, email addresses) is kept updated
- be Revenue Scotland's first point of contact in connection with SETS

If any person, being the sole or remaining Account Administrator, ceases to be the Account Administrator for any reason, the Organisation shall appoint a new Account Administrator as soon as practicable.

Account Security Administrator

The SETS portal allows the option of a secondary and additional 'Account Security Administrator' role to be assigned. Any User assigned this role has similar functional ability as the Account Administrator.

Full administrative responsibility for an Organisation's SETS account remains with the Account Administrator.

2. User roles and permissions

The action and permissions of all SETS users is determined by the User Roles assigned. User Roles are assigned (and subsequently changed or amended, if required) by either the Account Administrator or the Account Security Administrator.

See below for details of the account administrator functionality of both Account Administrator and Account Security Administrators roles:

Account administrator functionality	Account Administrator	Account Security Administrator
Change organisation details		
Email address	X	
Telephone number	X	
Address	X	
Change own user details		
Name	X	X
Email address	X	X
Password	X	X
Create new or change existing user details		
Username	X	X
Status (current / inactive)	X	X
Name	X	X
Email address	X	X
Password	X	X
Assign or change User Roles (excluding your own)	X	X

Permissions
What users can do in the SETS portal is determined by what permissions they have been given. Permissions are assigned to new users, or changed/amended for existing users by either the Account Administrator or Account Security Administrator.

See below for details of the various permissions available to users:

permissions	activity
Create draft returns	Allows a user to create a draft return
Update draft returns	Allows a user to update a draft return
Submit returns	Allows a user to submit a return
Portal Return Amendment User	Allows a user to amend a return up to 12 months after the filing date
Portal Messenger User	Allows a user to create and send secure messages
Portal Claim User	Allows a user to make a claim against a filed return more than 12 months after the filing date
Portal Dashboard Viewer*	Allows the user to view the dashboard *this user role must be enabled for the user to be able to access the system

3. How to identify the Account Administrator

Users assigned either Account Administrator or Security Account Administrator roles will know they have administrator functionality if the 'Create or update users' link is available on their 'Account details' section of the SETS portal.

To check whether a User is assigned account administrator roles:

1. Log into SETS and click on the 'Account details' link

2. If the 'Create or update users' link is displayed, this User has account administrator functionality

If this link is not displayed, you do not have account administrator functionality and your account has not been assigned Account Administrator or Account Security Administrator roles.

In this case, contact the person in your organisation responsible for administering user accounts on SETS.

4. Add a new user

To add a new user, you will need to have account administrator functionality ie. have the role of either Account Administrator or Account Security Administrator enabled on your account.

To check whether you have account administrator functionality and have either of these roles enabled on your account, see **How to identify the Account Administrator** section for details. If you are the first person in your organisation to register for SETS, both roles will be automatically enabled.

To add a new user, follow these steps:

1. Log into SETS and click on the 'Account details' link

2. Click 'Create or update users' link.

If you cannot see this link, you do not have account administrator functionality and do not have Account Administrator or Account Security Administrator roles enabled on your account. In this case, contact the person in your organisation responsible for administering user accounts on SETS.

3. Click 'Create a new user for your account' link.

4. You will be asked to supply the following details for the new user:
- Name
- Email address
- Username
- Password

You will also need to assign permissions to the new user; this determines what they are able to do in SETS (see **User roles and permissions** section for details).

5. Once you have added the new user, inform them of their username and password.

6. When the new user logs in for the first time they will be asked to change their password, log in again (using their new password), and read/accept the 'Terms and Conditions' for the upgraded SETS.

Further information, including a pdf version of the 'Terms and Conditions' is available on the Revenue Scotland website.

5. Change user details

To change user details (either your own or those of other users), you will need to have account administrator functionality and have the role of Account Administrator or Account Security Administrator enabled (see **User roles and permissions** section for details).

The following user details can be changed in the system:
- Name
- Email address
- Password

All users can change their own passwords – you should do this immediately if you suspect your account has been compromised.

If you have the role of Account Administrator or Account Security Administrator enabled you can also change the level of access (the permissions) that a user has to the system (see **Assign or change user permissions** section for details).

To change user details, follow these steps:

1. Log into SETS and click on the 'Account details' link

2. Click 'Create or update users' link. If you cannot see this link you do not have an administrator role enabled (see **User roles and permissions** section for details).

Sign up details

This is where you update your account information and manage the access that you give other people to your account.

User Research Test		Update
Email address	test@revenue.scot	
Contact telephone number	01234 567891	
Address	Scottish Government, Victoria Quay, Edinburgh, EH6 9BR	Update

Your user details

Joe Bloggs

Email address	test@revenue.scot
Contact telephone number	
Username	UR_TEST

- Change your password
- Create or update users
- Terms & Conditions

3. Find the user whose details you want to change in the list and click 'edit row'. You can search for a user by entering all or part of their name and clicking 'Find'.

Account users

Name
Enter part or all of the user's full name

Current
Choose from list

Find

Username	Current	Full name	Email address
UR_TEST	Y	RSTester1	rstester1@revenue.scot
Edit row			
UR_TEST2	Y	RSTester2	rstester2@revenue.scot
Edit row			
UR_TEST3	Y	RSTester3	rstester3@revenue.scot
Edit row			

1-3

Create a new user for your account
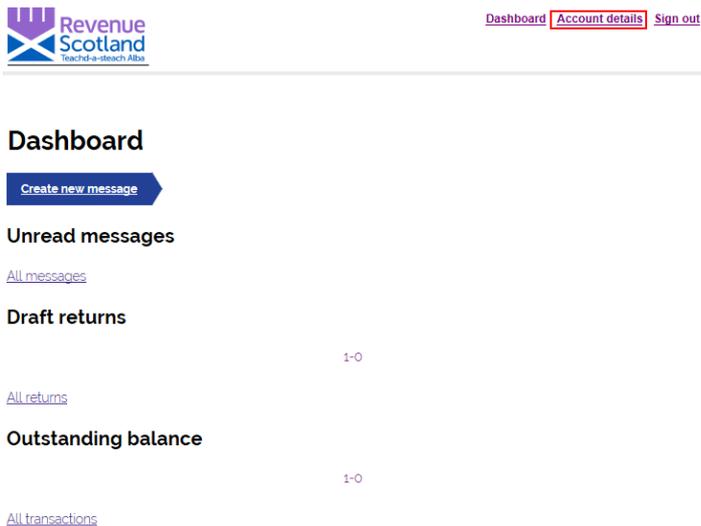You can create other users for your account and control the actions that they can take

4. Make changes to the user's details as necessary.

6. Assign or change user permissions

To assign or change user permissions you will need to have account administrator functionality and the role of either Account Administrator or Account Security Administrator role enabled on your account (see **User roles and permissions** section for details).

To assign or change user permissions, follow these steps:

1. Log into SETS and click on the 'Account details' link

2. Click 'Create or update users' link. If you cannot see this link you do not have an administrator role enabled (see **User roles and permissions** section for details).

3. Find the user whose permissions you want to assign or change in the list and click 'edit row'. You can search for a user by entering all or part of their name and clicking 'Find'.

Account users

Name
Enter part or all of the user's full name

Current
Choose from list

Find

Username	Current	Full name	Email address
UR_TEST	Y	RSTester1	rstester1@revenue.scot
Edit row			
UR_TEST2	Y	RSTester2	rstester2@revenue.scot
Edit row			
UR_TEST3	Y	RSTester3	rstester3@revenue.scot
Edit row			

1-3

Create a new user for your account   .
You can create other users for your account and control the actions that they can take

4. Assign or change user permissions by ticking or unticking from the 'User roles' list, as required (see **User roles and permissions** section for details).

User roles

☐ Account Administrator for Party via Portal

☐ Account Security Administrator for Party via Portal

☑ Create draft returns

☑ Update draft returns

☐ Submit returns

☐ Portal Return Amendment User

☑ Portal Messenger User

☐ Portal Claim User

☑ Portal Dashboard Viewer

Update User

5. Click 'Update User' to save your permissions.
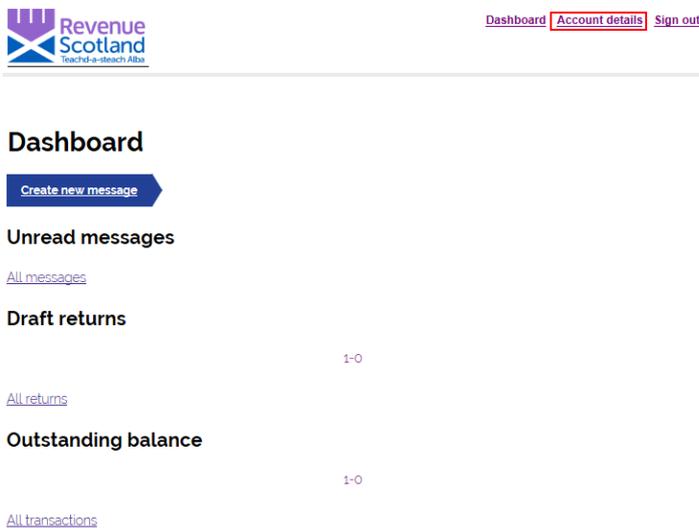
7. Amend the Organisation's details

To change the Organisation's details, you will need to have the Account Administrator role enabled (see **User roles and permissions** section for details).

The following organisation details can be changed in the system:
- Email address
- Telephone number
- Address

To change the Organisation's details, follow these steps:

1. Log into SETS and click on the 'Account details' link

2. There are two Update links on the account details page – use the top one to change email address or telephone number, and the bottom one to change address.