



AUSkey in the cloud

Access Manager (AM) User Interface Designs

25 February 2015


UNCLASSIFIED

Scenario 1 – ATO sets up software provider as an ‘online software provider’

DRAFT

Step 1 of 1 – ATO operator enables access to service

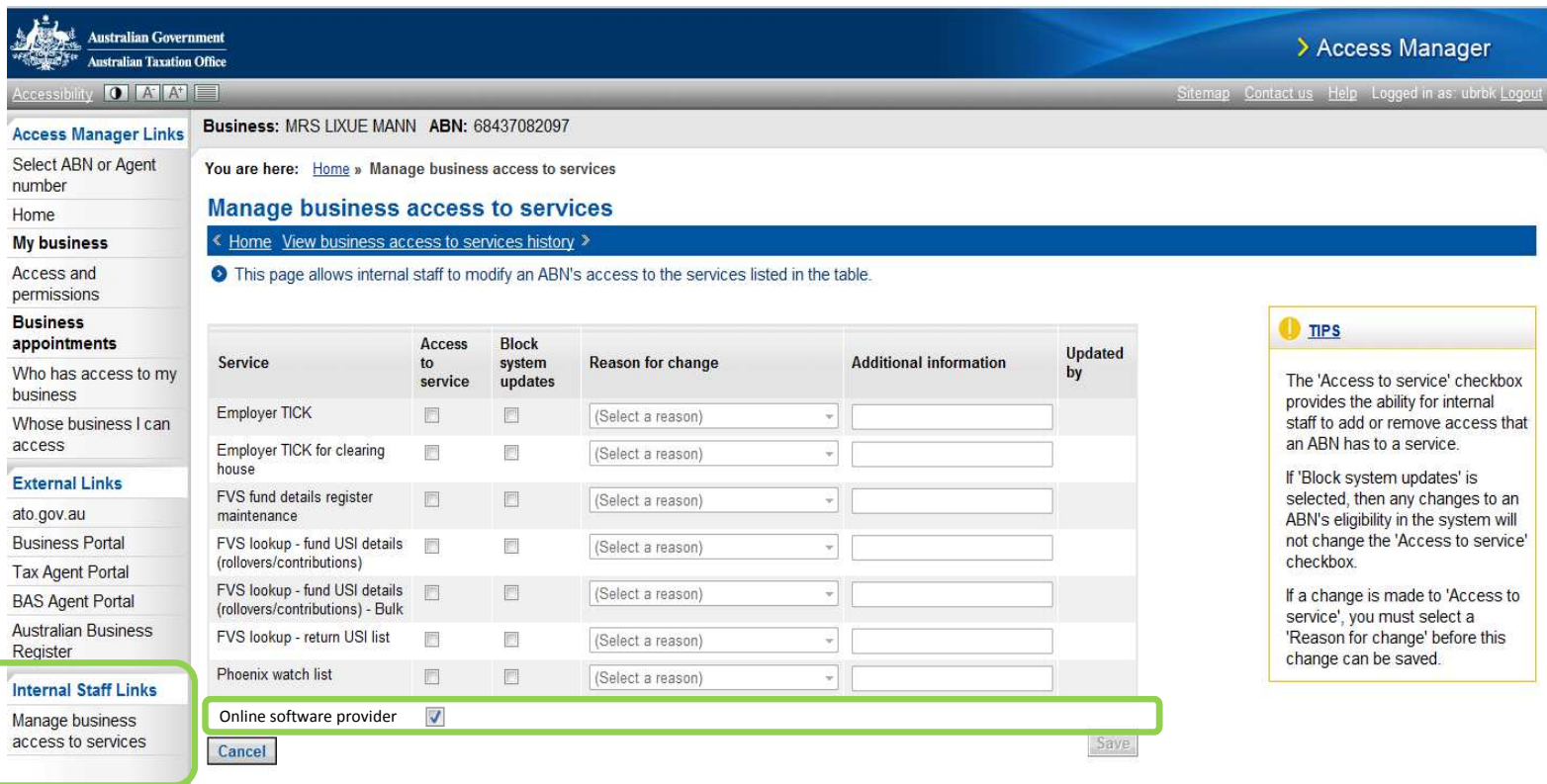
Actor: ATO operator



Once a software provider has the accredited process an ATO officer will perform the following steps in AM;

1. Searches the provider’s ABN.
2. Clicks on ‘Manage business access to services’ in the left hand menu
3. Ticks ‘Online software provider’ option and clicks ‘Save’

Note: This access will only be granted to the team managing the enablement of the ‘Online software provider’ service in AM



Access Manager

Australian Government
Australian Taxation Office

Business: MRS LIXUE MANN ABN: 68437082097

You are here: [Home](#) » Manage business access to services

Manage business access to services

[Home](#) [View business access to services history](#)

This page allows internal staff to modify an ABN's access to the services listed in the table.

Service	Access to service	Block system updates	Reason for change	Additional information	Updated by
Employer TICK	<input type="checkbox"/>	<input type="checkbox"/>	(Select a reason)		
Employer TICK for clearing house	<input type="checkbox"/>	<input type="checkbox"/>	(Select a reason)		
FVS fund details register maintenance	<input type="checkbox"/>	<input type="checkbox"/>	(Select a reason)		
FVS lookup - fund USI details (rollovers/contributions)	<input type="checkbox"/>	<input type="checkbox"/>	(Select a reason)		
FVS lookup - fund USI details (rollovers/contributions) - Bulk	<input type="checkbox"/>	<input type="checkbox"/>	(Select a reason)		
FVS lookup - return USI list	<input type="checkbox"/>	<input type="checkbox"/>	(Select a reason)		
Phoenix watch list	<input type="checkbox"/>	<input type="checkbox"/>	(Select a reason)		

Online software provider

[Cancel](#) [Save](#)

TIPS

The 'Access to service' checkbox provides the ability for internal staff to add or remove access that an ABN has to a service.

If 'Block system updates' is selected, then any changes to an ABN's eligibility in the system will not change the 'Access to service' checkbox.

If a change is made to 'Access to service', you must select a 'Reason for change' before this change can be saved.

Step 1 of 1 – The provider selects a tick-box next to the Device AUSKey and clicks ‘Save’

Actor: The online software provider



To enable a Device AUSKey, the software provider will need to;

1. Click on ‘Online Software provider functions’ in the left hand menu,
2. Select the tick box next to the relevant Device AUSKey and click ‘Save’

! Note:

The ‘Online software provider functions’ screen will only be visible to software providers enabled as an ‘Online Software Provider’ as per ATO internal process described on slide 2

Access Manager Links

- Home
- My business**
- Access and permissions
- Business appointments**
- Who has access to my business
- Whose business I can access
- Online software provider functions**
- External Links**
- ato.gov.au
- Business Portal
- Tax Agent Portal
- BAS Agent Portal
- Australian Business Register

Business: Tax Lodge Pty Ltd **ABN:** 98 146 732 999

You are here: [Home](#) »

Online software provider functions

< Home [Clients who have nominated me as a software provider to secure online \(cloud\) transmissions](#)>

From the list below, select the device AUSKey you would like to enable for the purposes of securing online transmissions (e.g. lodgements and prefill) for your clients and click ‘Save’.

Enable a Device AUSKey for securing online (cloud) transmissions for your clients

Device AUSKey name	User account status	Last accessed	Last updated	Enable for securing online transmissions
123.12.133.1	Active	12 Dec 2014	11 Nov 2014	<input checked="" type="checkbox"/>
device.lodge	Active	12 Dec 2014	11 Nov 2014	<input type="checkbox"/>

[Cancel](#) [Save](#)

Scenario 3 – Provider views clients or removes a client’s nomination

DRAFT

Step 1 of 2 – The provider views clients who have nominated them. The provider removes a client nomination.

Actor: The online software provider



To view clients who have nominated the online software provider;

1. Search for clients using the ABN or Business name or scroll through the list.

To Remove a client’s nomination;

1. Locate the client either through the search function or by scrolling through the list and
2. Click on ‘Remove nomination’

Continued on next page

! Note:

- The ‘Online software provider functions’ screen will only be visible to software providers enabled as an ‘Online Software Provider’ as per the process on slide 2
- Software providers will only be able to view clients that have nominated them

Australian Government
Australian Taxation Office

Access Manager

Accessibility [Icons] Sitemap Contact us Help Logged in as: JULIAN MANN Logout

Business: Tax Lodge Pty Ltd **ABN:** 98 146 732 999

You are here: [Home](#) »

Clients who have nominated me as a software provider to secure online (cloud) transmissions

[< Online software provider functions](#)

The list below shows businesses that have nominated you to secure online transmissions (e.g. lodgments and prefill) on their behalf.

Client search

ABN: and/or Business Name:

ABN	Business name	Nomination options
12 345 678 910	Jane Citizen	Remove nomination
10 987 654 321	Cumulo Nimbus	Remove nomination


! TIPS

To find a specific business, enter an ABN and/or business Name and select ‘Search’.

To remove a nomination made by a business, select ‘Remove nomination’ next to the business name.

Step 2 of 2 – The provider confirms the nomination removal

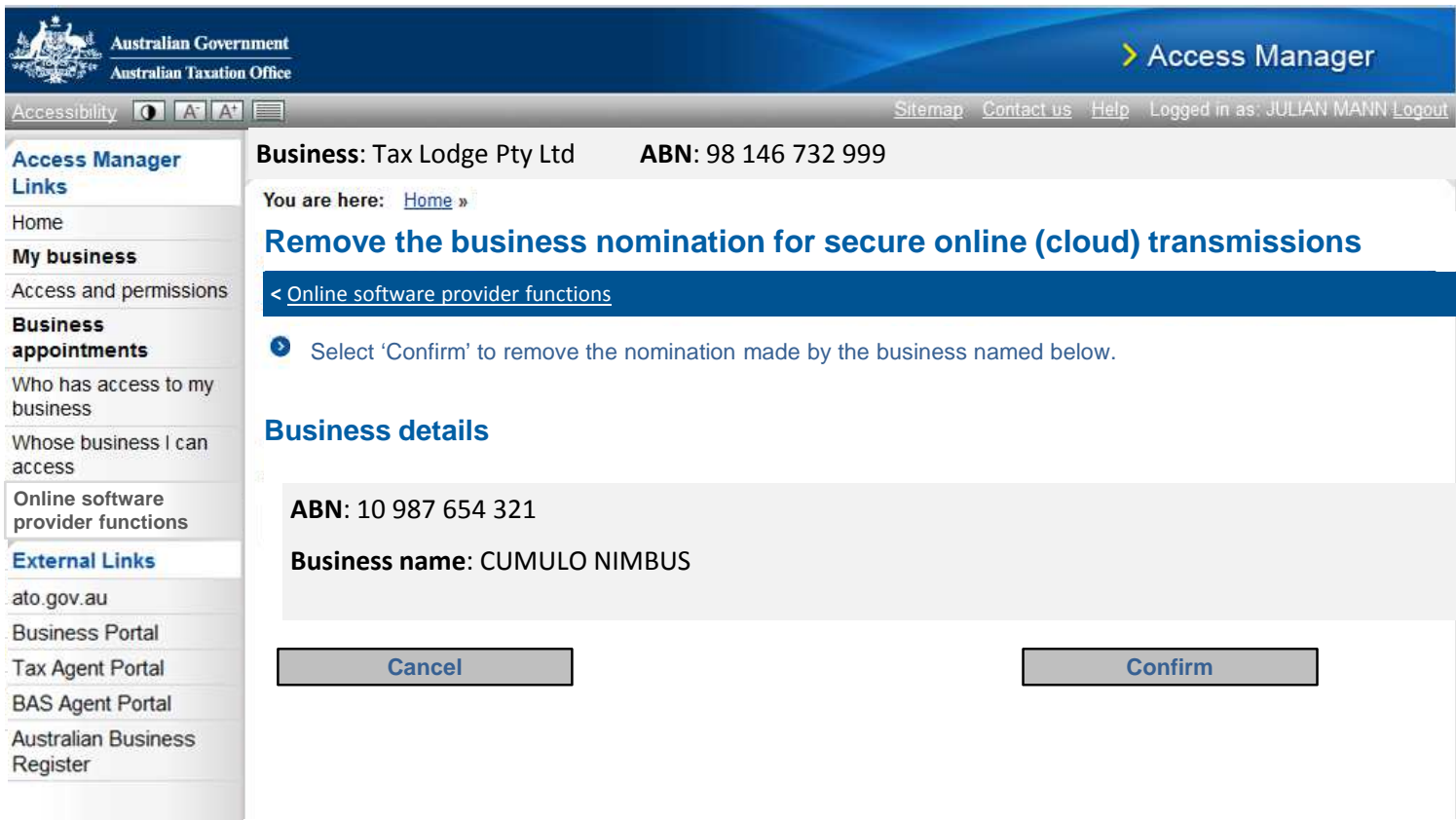
Actor: The online software provider



Continued from previous page

1. To confirm the nomination removal, select Confirm.

Note:
The 'Online software provider functions' screen will only be visible to software providers enabled as an 'Online Software Provider' as per ATO internal process described on slide 2



The screenshot shows the Australian Government Australian Taxation Office Access Manager interface. The user is logged in as JULIAN MANN. The main heading is 'Remove the business nomination for secure online (cloud) transmissions'. Below this, there is a breadcrumb trail: '< Online software provider functions'. A blue arrow icon points to the instruction: 'Select 'Confirm' to remove the nomination made by the business named below.' The 'Business details' section shows: 'Business: Tax Lodge Pty Ltd ABN: 98 146 732 999', 'ABN: 10 987 654 321', and 'Business name: CUMULO NIMBUS'. At the bottom, there are two buttons: 'Cancel' and 'Confirm'.

Actor: The client (Jane)



To nominate an online software provider, the client;

1. Clicks ‘My nominated software provider/s’ from the left hand menu

Australian Government
Australian Taxation Office

Access Manager

Accessibility [Icons] Sitemap Contact us Help Logged in as: JULIAN MANN Logout

Access Manager Links

- Home
- My business**
- Access and permissions
- Business appointments**
- Who has access to my business
- Whose business I can access
- My nominated software provider/s**
- External Links**
- ato.gov.au
- Business Portal
- Tax Agent Portal
- BAS Agent Portal
- Australian Business Register

Business: Ms JANE CITIZEN **ABN:** 12345678910

You are here: [Home](#) »

Welcome

Updates

Access Manager contains all the core functions of Online Access Manager and also incorporates some additional features such as the copy permissions function. This function allows you to copy the permissions you have assigned to one staff member and assign them to other staff. It can be accessed from the Access and permissions menu or via the quick link on this page.

Quick Links

- [Copy Permissions](#)

Actor: The client (Jane)



1. The client clicks ‘Nominate a provider’

Australian Government
Australian Taxation Office

Accessibility

Sitemap Contact us Help Logged in as: JULIAN MANN Logout

Access Manager
Links

- Home
- My business**
- Access and permissions
- Business appointments**
- Who has access to my business
- Whose business I can access
- My nominated software provider/s**
- External Links**
- ato.gov.au
- Business Portal
- Tax Agent Portal
- BAS Agent Portal
- Australian Business Register

Business: Ms JANE CITIZEN **ABN:** 12345678910

You are here: [Home](#) »

My nominated software provider/s

[< Home](#) [Nominate a software provider to secure online \(cloud\) transmissions >](#)

Nominated software providers are only responsible for securing transmissions (e.g. lodgments and prefill) that your business/entity chooses to make via the SBR channel through online accounting software.

Software providers nominated to secure my online (cloud) transmissions

No software provider/s nominated

Nominate a provider

TIPS

Modify my nominated software provider

Select an ABN in the list to either:


- Remove a nominated software provider
- Add or remove a Subscription ID

Scenario 4 – Client nominates a provider

DRAFT

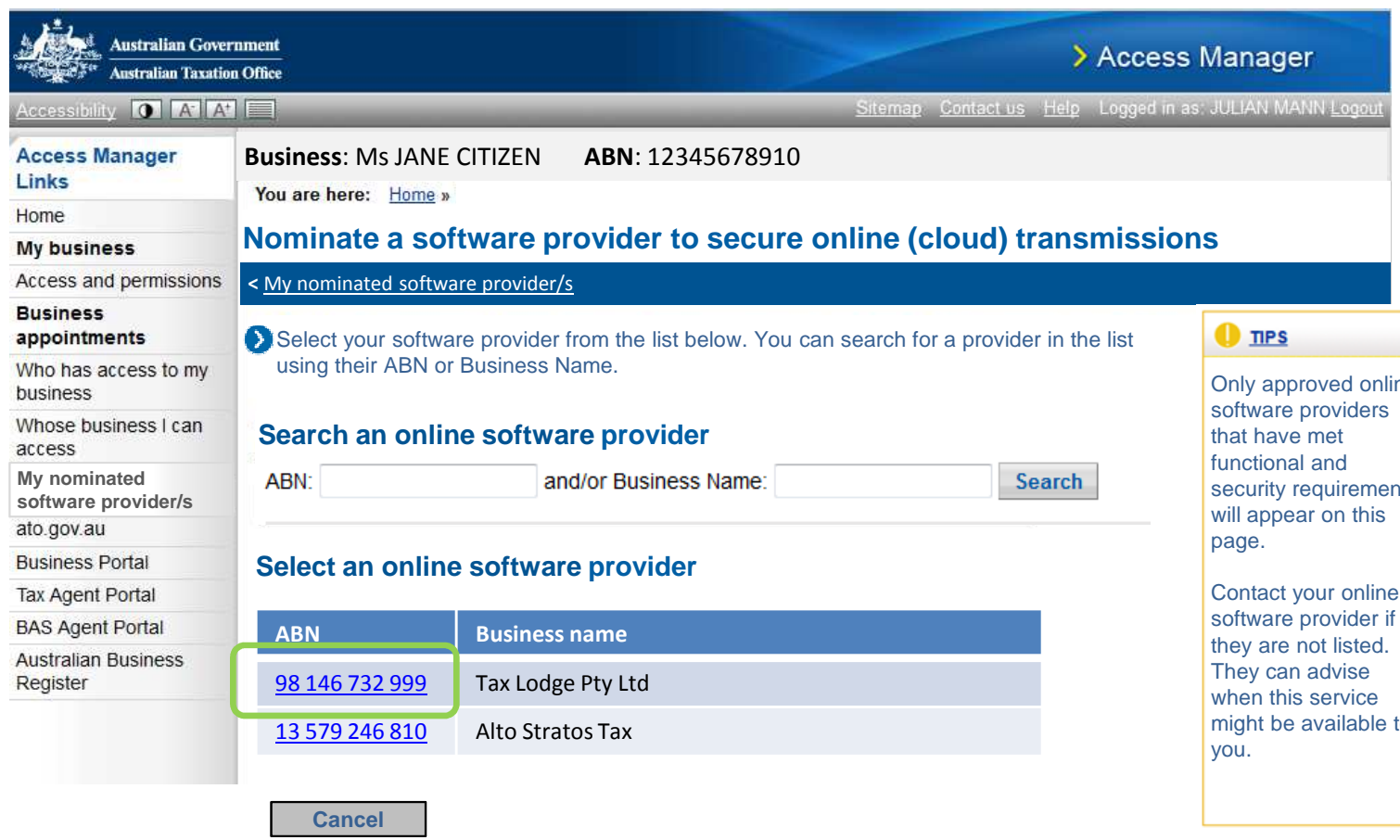
Step 3 of 6 – The client searches for and selects an online software provider from the list

Actor: The client (Jane)



1. Scroll or search the list to select an online software provider.
2. Once located, the ABN is clicked to continue with the nomination process.

Note: List Source - Only approved online software providers will appear in the software provider list below



Australian Government
Australian Taxation Office

Access Manager

Business: Ms JANE CITIZEN ABN: 12345678910

You are here: [Home](#) »

Nominate a software provider to secure online (cloud) transmissions

[< My nominated software provider/s](#)

Select your software provider from the list below. You can search for a provider in the list using their ABN or Business Name.

Search an online software provider

ABN: and/or Business Name:

Select an online software provider

ABN	Business name
98 146 732 999	Tax Lodge Pty Ltd
13 579 246 810	Alto Stratos Tax

TIPS

Only approved online software providers that have met functional and security requirements will appear on this page.

Contact your online software provider if they are not listed. They can advise when this service might be available to you.

Actor: The client (Jane)



The client;

1. Enters the Software ID/s, provided by their online software provider
2. Clicks 'Add'

Note:

- The Software ID is entered as part of the initial nomination process (one-off process). Thereafter, this Software ID is automatically attached with each transmission (e.g. lodgement / prefill) by the software provider.

Business: Ms JANE CITIZEN **ABN:** 12345678910

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Nominate a software provider to secure online (cloud) transmissions

[< Nominate a software provider to secure online \(cloud\) transmissions](#)

Nominated software provider details

ABN: 98 146 732 999
Online software provider: Tax Lodge Pty Ltd

Software IDs

A Software ID is issued from your nominated software provider to verify your online account with the provider and enable secure online (cloud) transmissions.

Software ID: *

No Software IDs listed


TIPS

You can add or remove Software IDs at any time.

You can also remove the nomination if you no longer subscribe to this online software provider.

Software developers refer to a 'Software ID' differently e.g. client ID, account ID or installation ID. **What is the preferred term to use?**

Actor: The client (Jane)

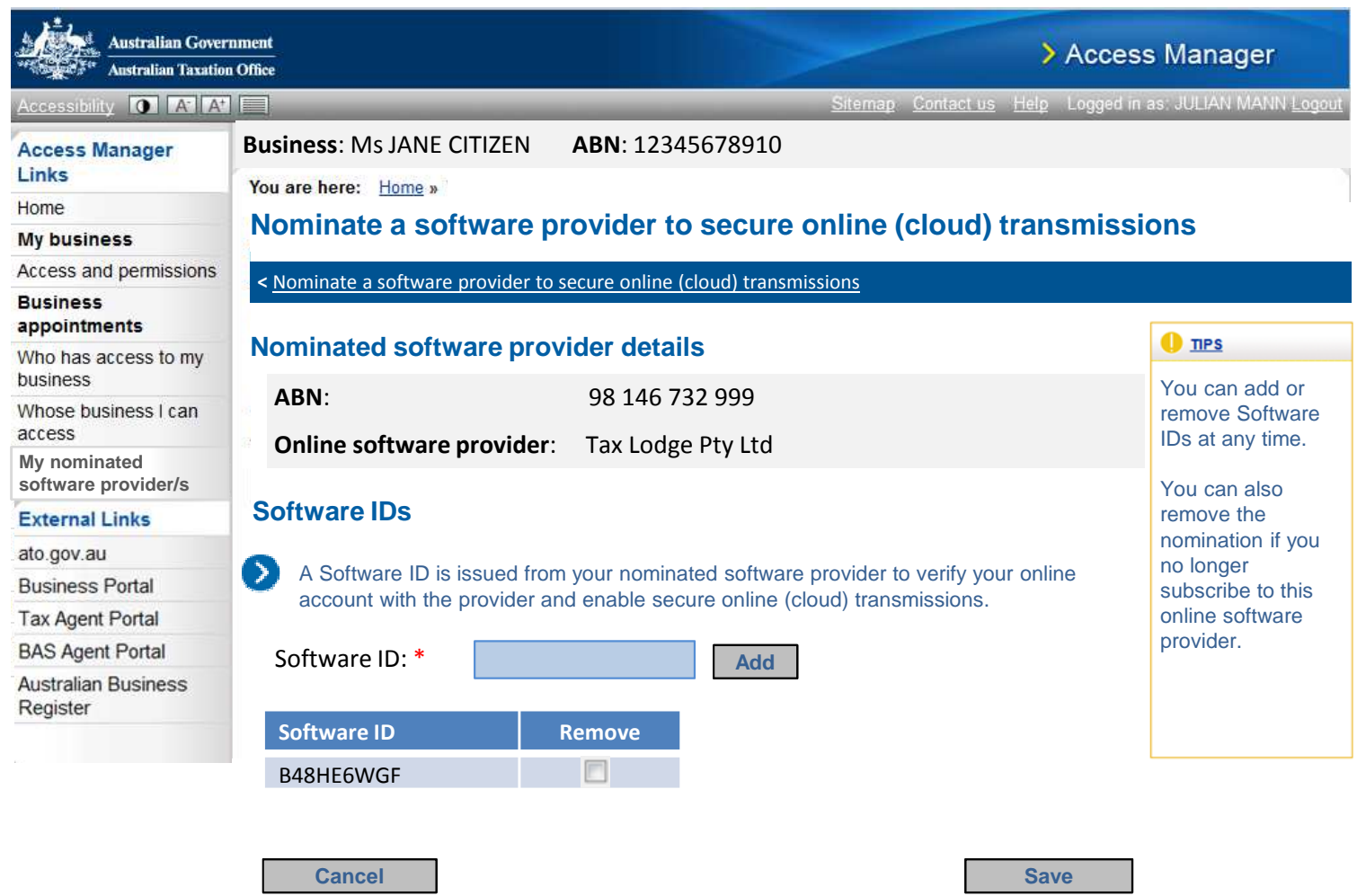


The client;

1. Clicks 'Save' button to continue. The 'Save' button will become activate once at least one Software ID has been added.

Note:

- The client is able to enter multiple Software IDs associated with the same ABN
- The client will not be able to proceed with the nomination without adding at least one Software ID



Australian Government
Australian Taxation Office

Access Manager

Business: Ms JANE CITIZEN ABN: 12345678910

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Nominate a software provider to secure online (cloud) transmissions

[< Nominate a software provider to secure online \(cloud\) transmissions](#)

Nominated software provider details

ABN: 98 146 732 999
Online software provider: Tax Lodge Pty Ltd

Software IDs

A Software ID is issued from your nominated software provider to verify your online account with the provider and enable secure online (cloud) transmissions.

Software ID: *

Software ID	Remove
B48HE6WGF	<input type="button" value="Remove"/>

TIPS

You can add or remove Software IDs at any time.

You can also remove the nomination if you no longer subscribe to this online software provider.

Actor: The client (Jane)



1. The client clicks 'Confirm' to acknowledge the role of the online software provider and to finalise the nomination.

The screenshot shows the Australian Taxation Office (ATO) website interface. At the top, it displays the Australian Government logo and the text 'Australian Taxation Office'. On the right, there is an 'Access Manager' link. Below the header, there are navigation links for 'Accessibility', 'Sitemap', 'Contact us', 'Help', and a user login status 'Logged in as: JULIAN MANN Logout'. A left-hand navigation menu includes sections for 'Access Manager Links', 'My business', 'Business appointments', and 'External Links'. The main content area is titled 'Confirm - Nominate a software provider to secure online (cloud) transmissions' and shows business details for 'Ms JANE CITIZEN' with ABN 12345678910. It includes a breadcrumb trail 'Home » My nominated software provider' and a warning icon with text: 'Nominated software providers are only responsible for securing transmissions (e.g. lodgments and prefill) that your business/entity chooses to make via the SBR channel through online accounting software. Please read the declaration below and select 'Confirm''. Below this is a section for 'Nominated software provider details' showing 'ABN: 98 146 732 999' and 'Online software provider: Tax Lodge Pty Ltd'. A 'Software IDs' section lists 'Software ID: B48HE6WGF'. A 'Declaration' section contains a text box with the following text: 'By selecting 'Confirm', I acknowledge the online software provider named above is not my agent and is not responsible for preparing any taxation, superannuation or other related documents on behalf of my business/entity. It can, however, submit transmissions (e.g. lodgments and prefill) through the SBR channel that my business/entity chooses to make through online accounting software.' At the bottom, there are two buttons: 'Back' and 'Confirm'.

Actor: The client (Jane)



1. A confirmation banner is displayed, and
2. The nominated online software provider listed

Business: Ms JANE CITIZEN **ABN:** 12345678910

You are here: [Home](#) »

My nominated software provider/s

Your nomination is confirmed.

[< Home](#) [Nominate a software provider to secure online \(cloud\) transmissions >](#)

Nominated software providers are only responsible for securing transmissions (e.g. lodgments and prefill) that your business/entity chooses to make via the SBR channel through online accounting software.

Software providers nominated to secure my online (cloud) transmissions

ABN	Business name	Software IDs
88 11 444 777	Tax Cloud professionals	B48HE6WGF

[Nominate a provider](#)


TIPS

Modify my nominated software provider

Select an ABN in the list to either:

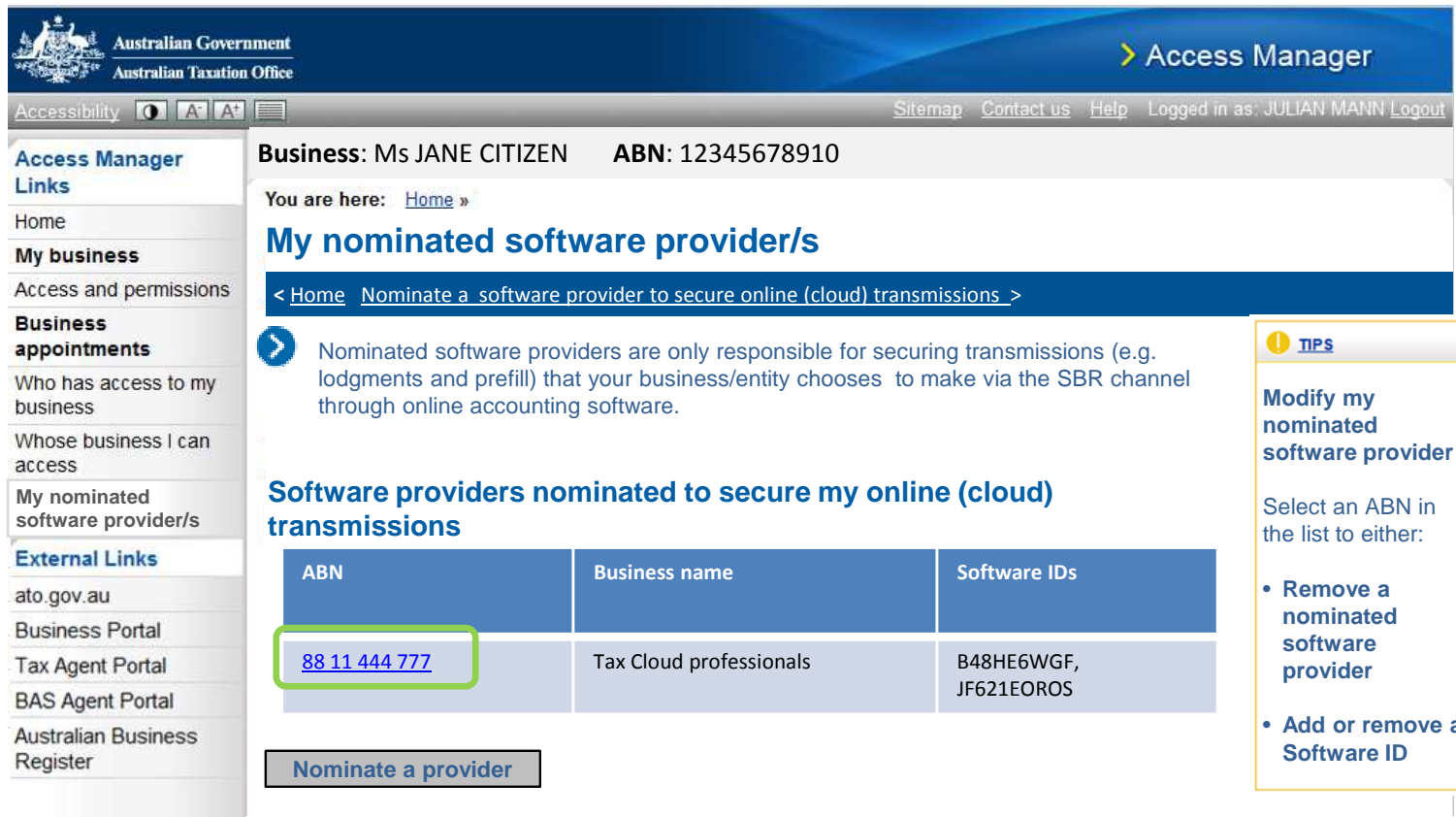
- Remove a nominated software provider
- Add or remove a Software ID

Actor: The client (Jane)



To modify or remove a nomination;

1. The client selects the relevant ABN



Australian Government
Australian Taxation Office

Access Manager

Business: Ms JANE CITIZEN ABN: 12345678910

You are here: [Home](#) »

My nominated software provider/s

< [Home](#) [Nominate a software provider to secure online \(cloud\) transmissions](#) >

TIPS

Modify my nominated software provider

Select an ABN in the list to either:


- Remove a nominated software provider
- Add or remove a Software ID

Software providers nominated to secure my online (cloud) transmissions

ABN	Business name	Software IDs
88 11 444 777	Tax Cloud professionals	B48HE6WGF, JF621EOROS

[Nominate a provider](#)

Actor: The client (Jane)

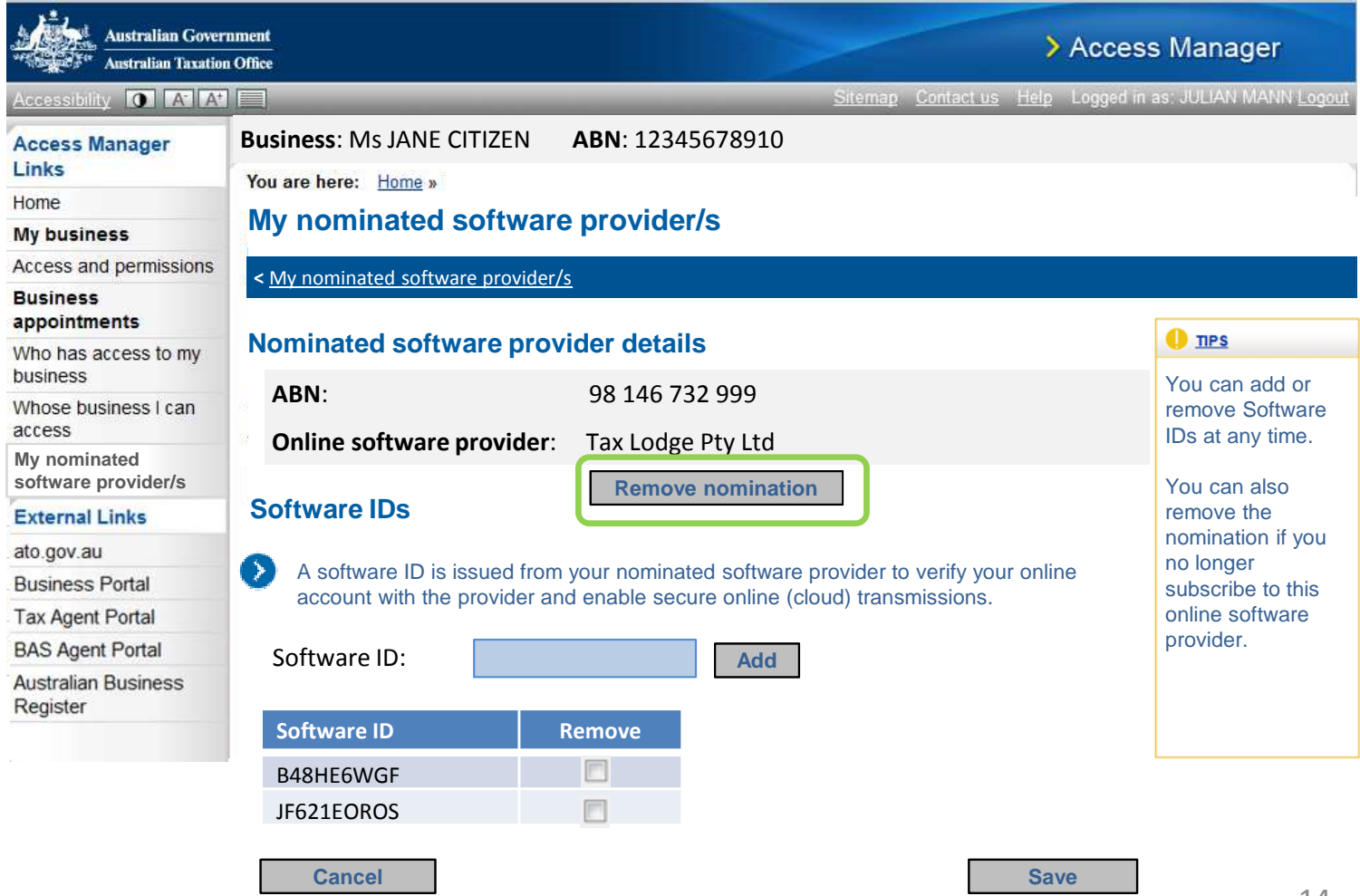


To remove an online software provider ;

- The client must click 'Remove nomination'

Note:

- The client will be able to:
 - Remove a software provider nomination entirely (including Software ID/s added)
 - Remove individual software IDs added as part of the software provider nomination



Access Manager
Australian Government
Australian Taxation Office

Business: Ms JANE CITIZEN ABN: 12345678910

You are here: [Home](#) »

My nominated software provider/s

< [My nominated software provider/s](#)

Nominated software provider details

ABN: 98 146 732 999

Online software provider: Tax Lodge Pty Ltd

Remove nomination

Software IDs

A software ID is issued from your nominated software provider to verify your online account with the provider and enable secure online (cloud) transmissions.

Software ID: **Add**

Software ID	Remove
B48HE6WGF	<input type="checkbox"/>
JF621EOROS	<input type="checkbox"/>

Cancel **Save**

TIPS

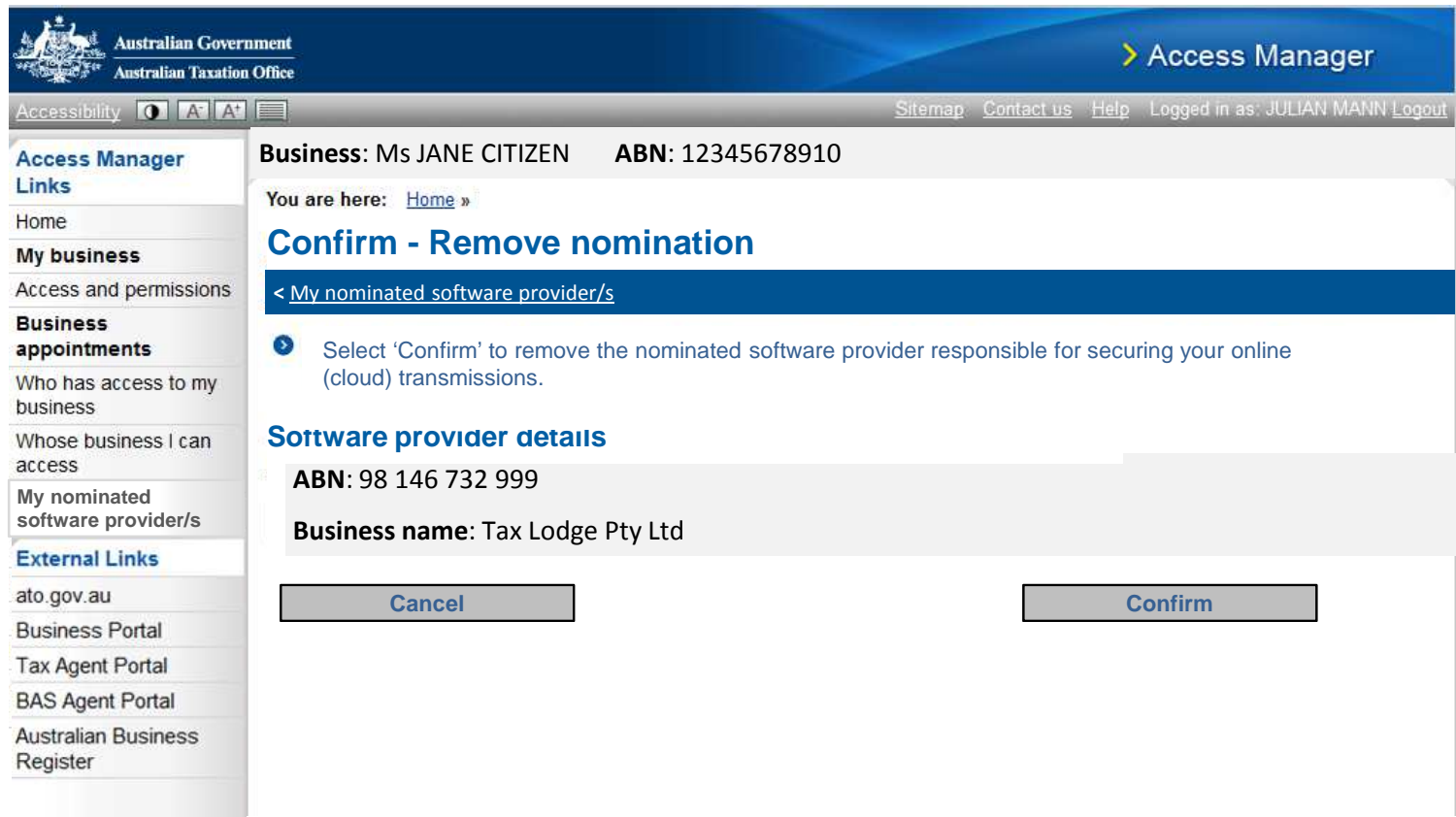
You can add or remove Software IDs at any time.

You can also remove the nomination if you no longer subscribe to this online software provider.

Actor: The client (Jane)




1. To confirm the removal of the nomination, the client clicks 'Confirm'

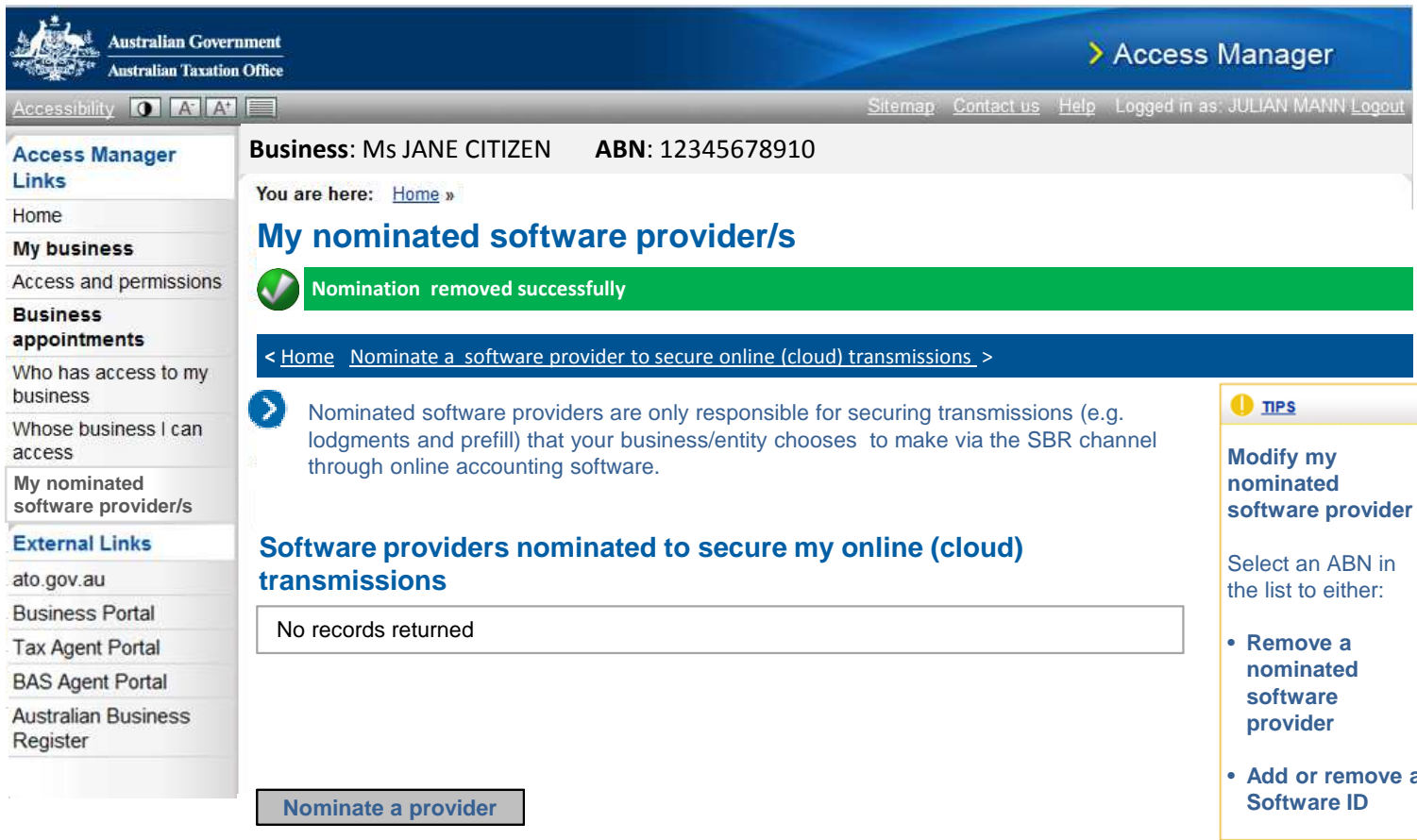


The screenshot shows the Australian Government Australian Taxation Office Access Manager interface. The user is logged in as JULIAN MANN. The page title is "Confirm - Remove nomination" and the breadcrumb is "< My nominated software provider/s". A message states: "Select 'Confirm' to remove the nominated software provider responsible for securing your online (cloud) transmissions." The software provider details are: ABN: 98 146 732 999 and Business name: Tax Lodge Pty Ltd. There are "Cancel" and "Confirm" buttons at the bottom.

Actor: The client (Jane)



1. Once removed successfully, the client is returned to the 'My nominated software provider/s' screen and a confirmation banner is displayed.




The screenshot shows the Australian Government Australian Taxation Office Access Manager interface. The user is logged in as JULIAN MANN. The page title is "My nominated software provider/s". A green confirmation banner at the top states "Nomination removed successfully". Below the banner, there is a breadcrumb trail: < Home Nominate a software provider to secure online (cloud) transmissions >. A tip icon is present next to the text: "Nominated software providers are only responsible for securing transmissions (e.g. lodgments and prefill) that your business/entity chooses to make via the SBR channel through online accounting software." The main content area is titled "Software providers nominated to secure my online (cloud) transmissions" and displays "No records returned" in a box. A "Nominate a provider" button is visible at the bottom. On the right side, a "TIPS" box contains the text "Modify my nominated software provider" and "Select an ABN in the list to either:" followed by two bullet points: "Remove a nominated software provider" and "Add or remove a Software ID".

Scenario 6 – Client adds or removes a Software ID from a software provider nomination

DRAFT

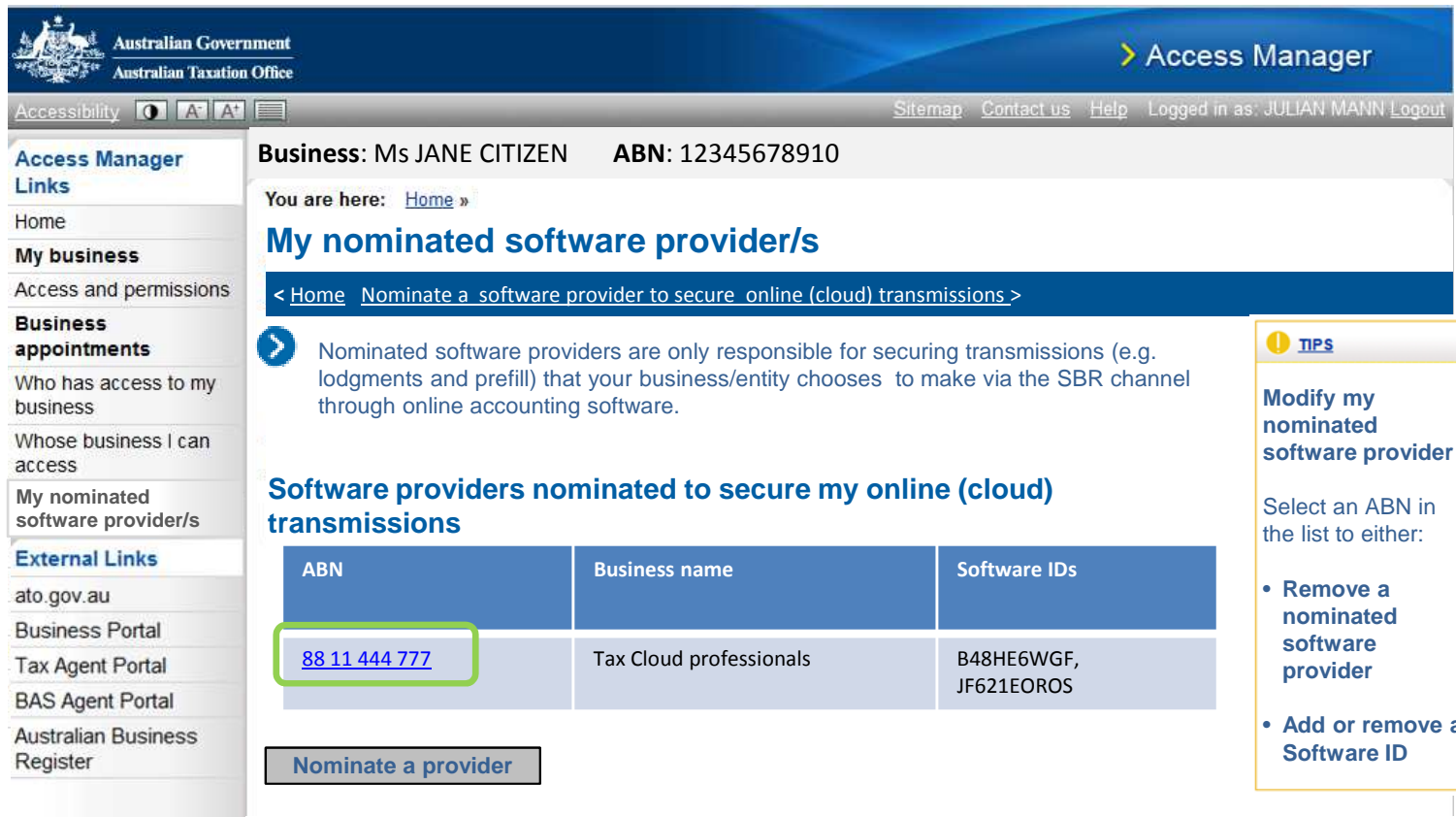
Step 1 of 3 – Client selects the nominated software provider

Actor: The client (Jane)



To modify or remove a nomination;

- The client selects the relevant ABN



Australian Government
Australian Taxation Office

> Access Manager

Accessibility | Sitemap | Contact us | Help | Logged in as: JULIAN MANN | Logout

Business: Ms JANE CITIZEN **ABN:** 12345678910

You are here: [Home](#) »

My nominated software provider/s

< [Home](#) [Nominate a software provider to secure online \(cloud\) transmissions](#) >

TIPS

Nominated software providers are only responsible for securing transmissions (e.g. lodgments and prefill) that your business/entity chooses to make via the SBR channel through online accounting software.

Software providers nominated to secure my online (cloud) transmissions

ABN	Business name	Software IDs
88 11 444 777	Tax Cloud professionals	B48HE6WGF, JF621EOROS

[Nominate a provider](#)

Modify my nominated software provider

Select an ABN in the list to either:


- Remove a nominated software provider
- Add or remove a Software ID

Scenario 6 – Client adds or removes a Software ID from a software provider nomination

DRAFT

Step 2 of 3 – The client adds or removes a Software ID/s

Actor: The client (Jane)

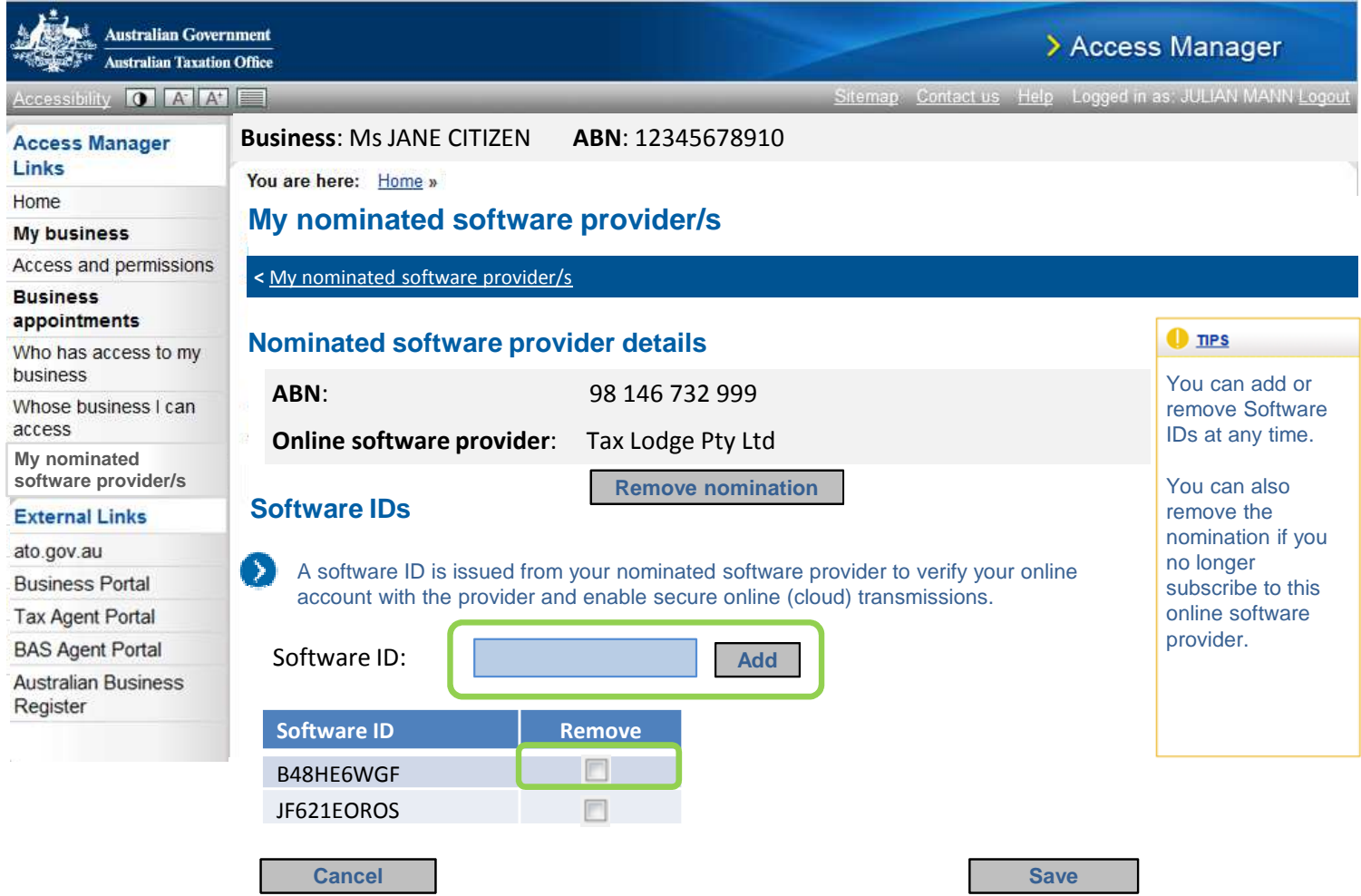


To add a specific Software ID;

1. The client must enter the Software ID, click 'Add' and
2. Click Save

To remove a specific Software ID;

1. The client must select the remove check box beside the relevant Software ID and
2. Click Save



Australian Government
Australian Taxation Office

> Access Manager

Accessibility [Icons] Sitemap Contact us Help Logged in as: JULIAN MANN Logout

Business: Ms JANE CITIZEN ABN: 12345678910

You are here: [Home](#) »

My nominated software provider/s

< [My nominated software provider/s](#)

Nominated software provider details

ABN: 98 146 732 999
Online software provider: Tax Lodge Pty Ltd

[Remove nomination](#)

Software IDs

➤ A software ID is issued from your nominated software provider to verify your online account with the provider and enable secure online (cloud) transmissions.

Software ID: [Add](#)

Software ID	Remove
B48HE6WGF	<input type="checkbox"/>
JF621EOROS	<input type="checkbox"/>

[Cancel](#) [Save](#)


TIPS

You can add or remove Software IDs at any time.

You can also remove the nomination if you no longer subscribe to this online software provider.

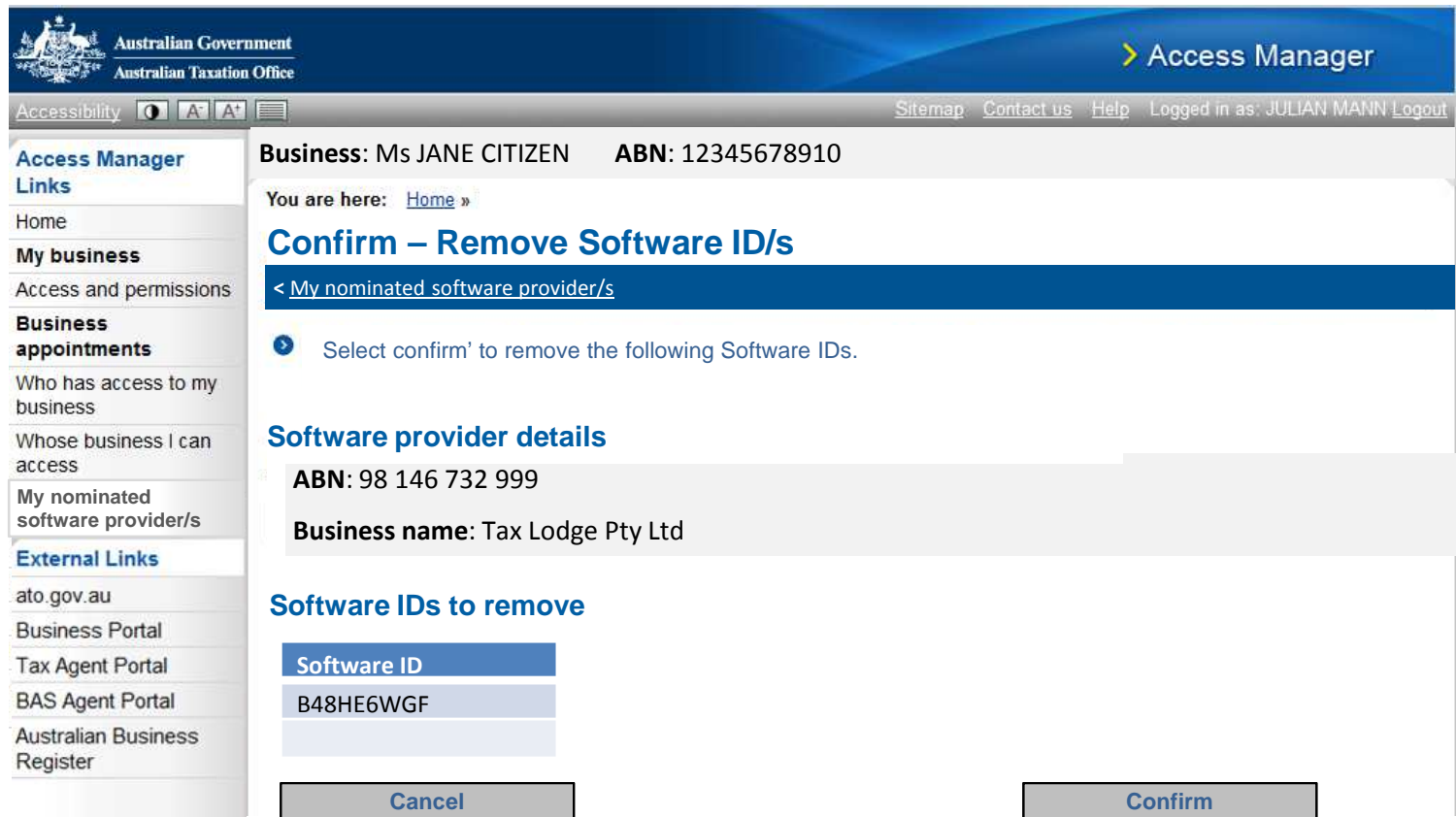
Step 3 of 3 – Client confirms the Software ID removal

Actor: The client (Jane)



If the client chooses to remove a Software ID they must

1. Confirm the removal of a Software ID clicks 'Confirm'



The screenshot shows the Australian Government Australian Taxation Office Access Manager interface. The user is logged in as JULIAN MANN. The page title is "Confirm – Remove Software ID/s". The breadcrumb trail is "< My nominated software provider/s". A message says "Select confirm' to remove the following Software IDs." Below this, under "Software provider details", the ABN is 98 146 732 999 and the business name is Tax Lodge Pty Ltd. Under "Software IDs to remove", there is a table with one entry: Software ID B48HE6WGF. At the bottom, there are "Cancel" and "Confirm" buttons.

Software ID
B48HE6WGF