



# DLS

DIVISION OF LOCAL SERVICES  
MA DEPARTMENT OF REVENUE

## DLS GATEWAY SECURITY MODULE LOCAL ADMINISTRATOR GUIDE

Revised for Modernization Release 5 – June 24<sup>th</sup>, 2017

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# DLS Gateway Security Module User Guide

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## Introduction

With the first rollout of new “modernized” code in February 2015, several changes were made in the Security module. Additional security enhancements will roll out in June, 2017 to further protect Gateway and the related systems it connects to. This guide will help Gateway administrators navigate new and existing user account features found in the Security module.

DLS’s Information Technology support staff is available to answer any questions you might have. Call either of these numbers during normal business hours, Monday through Friday:

Boston IT Support: (617) 626-2350

Springfield IT Support: (413) 452-3974

You may also email DLS IT Support: [DLSITGroup@dor.state.ma.us](mailto:DLSITGroup@dor.state.ma.us)

## The Security Module

The Security module allows local account administrators to:

- Create and manage user IDs and passwords for their community's system users.
- Set up and edit the functions users in different municipal departments can perform in the system modules.
- Deactivate users who have resigned, retired, or otherwise no longer need access.

*Municipal officials must be listed in the Local Officials Directory (LOD) to have a Gateway Account. An official's name will not appear in the Security module if he/she is not in the Directory. Enter new officials in the Directory prior to adding them to Gateway.*

Not all officials need a Gateway account. Officials that work on forms required by the Division of Local Services will need an account; officials that don't typically send data to DLS probably don't need an account. All officials, however, can be listed in the Local Officials Directory as a public service.

## Account Maintenance - User Passwords

Beginning June 25<sup>th</sup>, 2017 Gateway requires the use of strong passwords. Existing users whose passwords do not meet the new "strong password" requirements will be automatically directed to the My Profile page to enter a new password on their first login following that date. Administrators entering new users after June 25, 2017 will need to assign each new user a password that meets the new requirements.

### Strong Password Requirements

Passwords must meet the following requirements:

- Must be at least 8 characters long
- Must contain 1 uppercase character
- Must contain 1 lowercase character
- Must contain 1 number
- Must contain 1 special character - ex. # % \*
- Cannot exceed 20 characters in length

These requirements take effect June 24<sup>th</sup>, 2017.

Users with existing passwords that don't meet the new requirements will be automatically directed on first login to the My Profile page where they will choose a new password. The new requirements are displayed on My Profile, and Gateway will display an error message reminding users about the new rules when they enter a password that doesn't meet the standards.

### Resetting a Password

Administrators can reset user passwords in the Security module's User Maintenance screen. This can be done by DLS IT Support staff as well as by local (municipal) Gateway administrators. The names and numbers of local account administrators can be found using the "Forgot user name" link on Gateway's login page.



Users can also reset their own passwords by using the “self-service” option on the Gateway login page. There are three requirements for using the “Forgot password” self-service reset:

- A valid user name
- A valid email address in Local Officials Directory
- A valid answer to the Security Question

Users can review or change their security question/answer pair in the My Profile screen. Although their current email address is visible in My Profile, it cannot be changed in that screen. Go to the Local Officials Directory to modify an email address.

### Failed Login/Account Lock Policy

Gateway will allow a maximum of 10 login attempts, using either the normal login process or the “Forgot Password” self-service reset. After 10 failed attempts, Gateway will lock the user’s account for 30 minutes. Locked accounts can be unlocked at any time by a local or DLS Gateway administrator. Accounts cannot be locked by an administrator; they can only be unlocked. These policies take effect June 24<sup>th</sup>, 2017 in combination with strong password requirements.

### Account Maintenance - Search User

The **Search User Feature** allows you to view all users or search for any user with an **active username** within a jurisdiction. When viewing all users, you can change the default display to show up to 10, 25, 50 or 100 users in the Search Results. There are two ways to access a specific user’s account:

1. To select a user from the search results, simply click the user’s name. The selected user’s permissions will be displayed in the **User Maintenance** screen. (See **Account Maintenance - User Maintenance** for more information.)

Division of Local Services Gateway

Certification Taxrate District Taxrate Schedule A LA3 Misc Forms Directory Licensee Provider **Security**

Account Maintenance  
 Search User  
 User Maintenance

**Search User**  
 Search Results

**ABINGTON - 001**

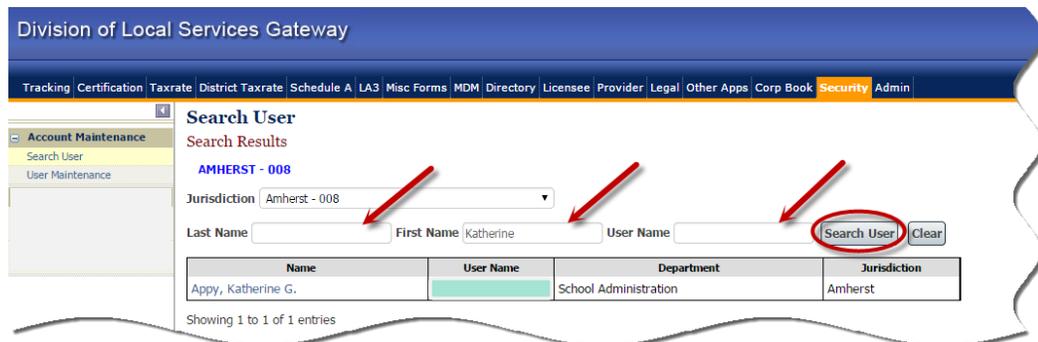
Jurisdiction: Abington - 001

Last Name: \_\_\_\_\_ First Name: \_\_\_\_\_ User Name: \_\_\_\_\_

Name	User Name	Department	Jurisdiction
Adams, Leanne M.		City/Town Clerk	Abington
Burbine, R. Andrew		Selectmen/Town Council	Abington
Coyle, Kenneth		Selectmen/Town Council	Abington
Frane, Michael		Selectmen/Town Council	Abington
Hurst, Jodie		Assessors	Abington
LaFond, Richard		City/Town Manager	Abington
Moquin, Suzanne		Accountant/Auditor	Abington
Pistorino, Jack		Assessors	Abington
Provost, Leo		Treasurer	Abington
Shea, Joe		Assessors	Abington

Showing 1 to 10 of 10 entries

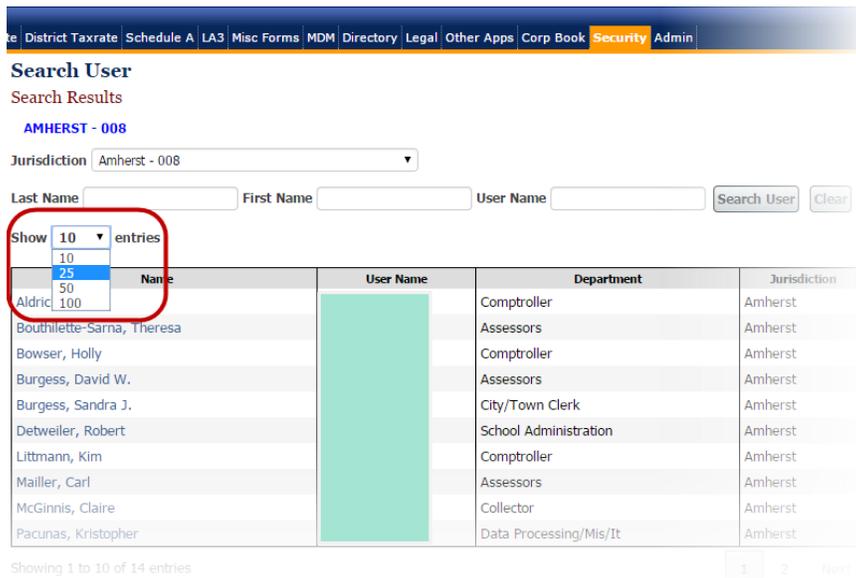
- To search for a specific user, enter a search term in the **Last Name**, **First Name** or **User Name** field (this can be a complete name or a portion of the name) and then click on the **Search User** button to display the specified user.



### Changing the Number of Entries Displayed

DLS Gateway displays **10** entries by default. It can be changed to display up to **10, 25, 50** or **100** entries as needed.

- Click the **Show entries** dropdown menu and scroll to the number of entries you wish to display on one page.



Note that the number selected will be the maximum number of entries displayed. In this example **25** was selected, but there are only **14** entries to show.

**Search User**  
 Search Results  
 AMHERST - 008

Jurisdiction: Amherst - 008

Last Name:  First Name:  User Name:

Show 25 entries

Name	User Name	Department	Jurisdiction
Aldrich, Sonia		Comptroller	Amherst
Bouthillette-Sarna, Theresa		Assessors	Amherst
Bowser, Holly		Comptroller	Amherst
Burgess, David W.		Assessors	Amherst
Burgess, Sandra J.		City/Town Clerk	Amherst
Detweiler, Robert		School Administration	Amherst
Littmann, Kim		Comptroller	Amherst
Mailler, Carl		Assessors	Amherst
McGinnis, Claire		Collector	Amherst
Pacunas, Kristopher		Data Processing/Mis/It	Amherst
Pooler, Sanford		Finance Director	Amherst
Puppel, Debra		City/Town Manager	Amherst
Racca, Maria		Finance Director	Amherst
Turati, Lori J		Assessors	Amherst

Showing 1 to 14 of 14 entries 1

If not all users are displayed on a page, navigation buttons for the additional pages will appear at the bottom right of the screen. Click the icon for the page number you wish to go to, or click Next to advance or Previous go back one page at a time.

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Showing 1 to 10 of 13 entries 1 2 Next

## Account Maintenance - User Maintenance

The User Maintenance Feature allows you to:

- a. Establish a User Name and Password
  - b. Make a user Active/Inactive
  - c. Set User Permissions and department access
1. To change an existing user's **account** status (changing from Active to Inactive or vice versa) check or uncheck the Active checkbox accordingly. A check in the Active box means the user is Active and can log into Gateway.
    - a. Removing a municipal official from the Local Officials Directory (LOD) automatically makes a user account Inactive.
    - b. Unchecking the Active checkbox in User Maintenance to make a user inactive will not automatically remove the official from LOD; it just makes the account inactive.
  2. To create a new user account for an official listed in LOD:
    - a. Click the dropdown menu and scroll to select a **Person**. An asterisk next to an officials name means that the account is inactive.

**User Maintenance**  
Login Modification  
AMHERST - 008

Jurisdiction: Amherst - 008

Person: --Select a Person-- Inactive users in Person dropdown are indicated by "\*"

- Select a Person--
- Aldrich, Sonia - Comptroller
- Appy, Katherine G. - School Committee
- Bilz, Barbara - Golf Course Superintendent
- Board, Select - LO Meals Verification
- Bobrowski, Paul G. - Housing Authority
- Bouthilette-Sama, Theresa - Admin Assistant
- Bowser, Holly - Asst. Comptroller
- Brewer, Alisa V. - Select Board
- Brooks, Judy H. - Housing Authority
- Burgess, David W. - Principal Assessor
- Burgess, Sandra J. - Town Clerk
- Chalfant, Linda - L.S.S.E. Director
- Coull, John W. - Elector, Oliver Smith Will
- Detweiler, Robert - School Business Manager
- Federman, Julie - Health Director
- Geryk, Maria - Superintendent of Schools
- Hayden, Aaron A. - Redevelopment Authority
- Hayden, Aaron A. - Select Board

York, Corey - Town Engineer

Yu, Gary - Assessor

\*Krause, Lisa - Town Accountant

\*Kucala, Karen - Town Accountant

\*McMullen, Brian W. - Assistant Assessor

\*Murray, John - Treasurer

\*Powell, Daryl - Property Lister

\*Summers, Sharon - Business Manager

\*Tassone, Joseph S - Town Accountant

Inactive users have an asterisk to the left of their names

- For a new user: complete the **User Name** (not case-sensitive), **Password** (must conform to Strong Password requirements and it is case-sensitive) and **Confirm Password** fields. The **Department** and **Position** fields are automatically filled with information from the Local Officials Directory.

**User Maintenance**  
Login Modification  
AMHERST - 008

Jurisdiction: Amherst - 008

Person: Federman, Julie - Health Director Inactive users in Person dropdown are indicated by "\*"

User Name\* [ ] Department: Health Inspection Services

Password\* [ ] Position: Health Director

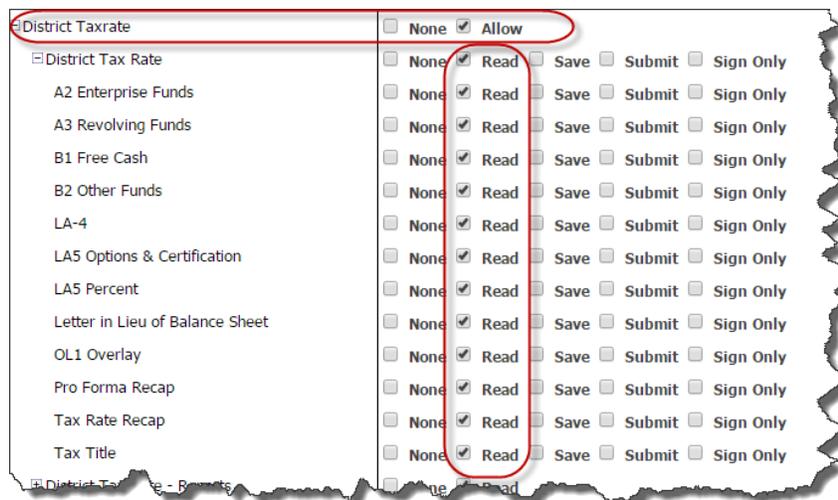
Confirm Password\* [ ] Active

**NOTE:** The User Name field cannot be changed once saved.

- b. The permissions currently set for the user are checked. *New user permissions are defined as **None** by default.* You must grant a user permission to use *at least one module* in order to save Security changes when creating a new account.

**NOTE:** The Permissions modules/submodules are shown in hierarchical order. Permissions for each form or process can be assigned to suit local business needs or can be automatically assigned using a pre-programmed Profile; see the details below for an explanation.

- c. To grant a user access to a top level (level one) module, click the Allow checkbox.
- d. To view the permissions underneath a level one module, click on the + next to the left of the module name. The level two (submodule) permissions will expand underneath the module.
- e. Click the checkboxes associated with the permissions you wish to give the user.
- f. Each permission must be explicitly set for each module/submodule. For example, granting a user **Submit** permission does not automatically give users permission to **Save**. This allows greater flexibility at the local level, to more accurately reflect the real job responsibilities of local officials and their staff. There is some cascading of rights, as described below:
  - i. If a user is allowed permission to a Level One Module (the modules that appear on the blue Module banner at the top of Gateway) they are automatically given **Read** rights to all its submodules.



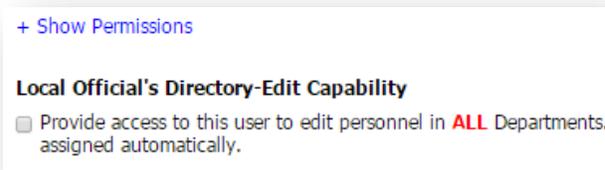
- ii. Likewise, if a user's rights to a level one or two module are changed to **None**, all rights to its submodules are changed to **None** as well.

<input checked="" type="checkbox"/> District Tax Rate	<input checked="" type="checkbox"/> None	<input type="checkbox"/> Read	<input type="checkbox"/> Save	<input type="checkbox"/> Submit	<input type="checkbox"/> Sign Only
A2 Enterprise Funds	<input checked="" type="checkbox"/> None	<input type="checkbox"/> Read	<input type="checkbox"/> Save	<input type="checkbox"/> Submit	<input type="checkbox"/> Sign Only
A3 Revolving Funds	<input checked="" type="checkbox"/> None	<input type="checkbox"/> Read	<input type="checkbox"/> Save	<input type="checkbox"/> Submit	<input type="checkbox"/> Sign Only
B1 Free Cash	<input checked="" type="checkbox"/> None	<input type="checkbox"/> Read	<input type="checkbox"/> Save	<input type="checkbox"/> Submit	<input type="checkbox"/> Sign Only
B2 Other Funds	<input checked="" type="checkbox"/> None	<input type="checkbox"/> Read	<input type="checkbox"/> Save	<input type="checkbox"/> Submit	<input type="checkbox"/> Sign Only
LA-4	<input checked="" type="checkbox"/> None	<input type="checkbox"/> Read	<input type="checkbox"/> Save	<input type="checkbox"/> Submit	<input type="checkbox"/> Sign Only
LA5 Options & Certification	<input checked="" type="checkbox"/> None	<input type="checkbox"/> Read	<input type="checkbox"/> Save	<input type="checkbox"/> Submit	<input type="checkbox"/> Sign Only
LA5 Percent	<input checked="" type="checkbox"/> None	<input type="checkbox"/> Read	<input type="checkbox"/> Save	<input type="checkbox"/> Submit	<input type="checkbox"/> Sign Only
Letter in Lieu of Balance Sheet	<input checked="" type="checkbox"/> None	<input type="checkbox"/> Read	<input type="checkbox"/> Save	<input type="checkbox"/> Submit	<input type="checkbox"/> Sign Only
OL1 Overlay	<input checked="" type="checkbox"/> None	<input type="checkbox"/> Read	<input type="checkbox"/> Save	<input type="checkbox"/> Submit	<input type="checkbox"/> Sign Only
Pro Forma Recap	<input checked="" type="checkbox"/> None	<input type="checkbox"/> Read	<input type="checkbox"/> Save	<input type="checkbox"/> Submit	<input type="checkbox"/> Sign Only
Tax Rate Recap	<input checked="" type="checkbox"/> None	<input type="checkbox"/> Read	<input type="checkbox"/> Save	<input type="checkbox"/> Submit	<input type="checkbox"/> Sign Only
Tax Title	<input checked="" type="checkbox"/> None	<input type="checkbox"/> Read	<input type="checkbox"/> Save	<input type="checkbox"/> Submit	<input type="checkbox"/> Sign Only

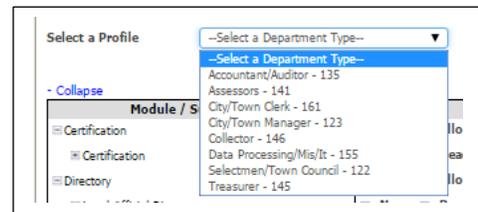
- iii. Granting a user any rights higher than **Read** for modules or submodules automatically grants **Read** rights.

<input checked="" type="checkbox"/> District Taxrate	<input type="checkbox"/> None <input checked="" type="checkbox"/> Allow
<input checked="" type="checkbox"/> District Tax Rate	<input type="checkbox"/> None <input checked="" type="checkbox"/> Read <input checked="" type="checkbox"/> Save <input type="checkbox"/> Submit <input type="checkbox"/> Sign Only
<input checked="" type="checkbox"/> District Tax Rate - Reports	<input checked="" type="checkbox"/> None <input type="checkbox"/> Read

- g. To temporarily hide the user permissions box, click **- Collapse**. To make it visible again, click **+ Show Permissions**.



- h. If you aren't sure what an official's rights should be, there may be a pre-defined user Profile for their department that you can use to set up the account.



Select the department type matching the official's department from the list. A set of basic user rights typically assigned to most people in that department will be set automatically; these rights can be accepted "as-is", or can be modified to suit local needs. Remember to click Save after selecting a Profile or modifying the user rights.

**Remember:** You must grant a user permission to use *at least one module* in order to save Security changes when creating a new account.

3. You can give a user **Local Official's Directory-Edit Capability**—permission to **add, update and delete** officials—in all departments or in selected departments.

**Local Official's Directory-Edit Capability**

Provide access to this user to edit personnel in **ALL** Departments. New departments added will be assigned automatically.

OR

Provide access to **SELECTIVE** Departments(select from the list below) for this user to edit personnel in the selected Departments. This option will refresh the screen and require re-entry of password.

**Available Departments**

- 131 - Finance Committee
- 133 - Finance Director
- 134 - Comptroller
- 135 - Accountant/Auditor
- 145 - Treasurer
- 146 - Collector
- 152 - Personnel
- 155 - Data Processing/Mis/It
- 161 - City/Town Clerk
- 165 - License Commission
- 171 - Conservation Commission
- 175 - City/Town Planning Board

**Selected Department(s)**

- 114 - Moderator
- 122 - Selectmen/Town Council
- 123 - City/Town Manager
- 141 - Assessors

Save

- a. To give a user rights to edit users in all departments, click the checkbox to the left of the Provide Access to...**ALL** Departments option.  
Please note that checking this box will hide the selection boxes underneath the Selective access option. Unchecking the All Departments option will cause the Selected Departments boxes to reappear.
- b. To allow the user to edit selected departments only, select one or more departments in the **Available Departments** box and click the > button to move them into the **Selected Departments** box; hold down the Ctrl key while clicking to select multiple departments. Clicking the >> button will move all available departments to the **Selected Departments** box.

- c. To Remove departments from the **Selected Departments** box click on the < or << buttons to remove selected departments or all departments respectively.

**Local Official's Directory-Edit Capability**

Provide access to this user to edit personnel in **ALL** Departments. New departments added will be assigned automatically.

OR

Provide access to **SELECTIVE** Departments(select from the list below) for this user to edit personnel in the selected Departments. This option will refresh the screen and require re-entry of password.

**Available Departments**

- 131 - Finance Committee
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- 161 - City/Town Clerk
- 165 - License Commission
- 171 - Conservation Commission
- 175 - City/Town Planning Board

**Selected Department(s)**

- 114 - Moderator
- 122 - Selectmen/Town Council
- 123 - City/Town Manager
- 141 - Assessors

Buttons: >, >>, <, <<

Tooltip: move all items from right to left

Save

4. Click the **Save** button to keep changes.

## Contacting DLS for assistance

For assistance with user maintenance and security tasks, please contact the Division of Local Services' IT Support staff during normal business hours:

DLS IT Support: (617) 626-2350 or [DLSITGroup@dor.state.ma.us](mailto:DLSITGroup@dor.state.ma.us)

Outside of normal business hours, please leave a voice mail or send an email with your name, community or district name and a brief description of your question or problem. A DLS IT Support representative will contact you on the next business day.