

Massachusetts Department of Revenue
Division of Local Services



**GATEWAY MODERNIZATION
SECURITY MODULE
LOCAL ADMINISTRATOR GUIDE**

9/21/2015

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DLS Gateway Security Module User Guide

Introduction

Beginning in February, 2015, the Division of Local Services' Gateway application underwent the first major revision since its inception in 2009. The Gateway Modernization project is a multi-year enhancement initiative that will add functionality for municipal officials and DLS staff; it will also bring Gateway's infrastructure up to modern IT standards for greater stability and better performance.

With the first rollout of new "modernized" code in February, several changes were made in the Security module. This guide, which is being revised as new functionality becomes available, will help administrators navigate the new features in Security; existing functions haven't changed significantly, but the look and feel of the module is slightly different. DLS Information Technology advisors are available to answer any questions you might have; please call us at (617) 626-2350 or email DLSITGroup@dor.state.ma.us to speak to an IT Support representative.

In this guide, look for the star symbol indicating a new feature, or an existing feature that might look different, as a result of the Gateway Modernization. 

Security

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 LOD prior to adding them to Gateway.

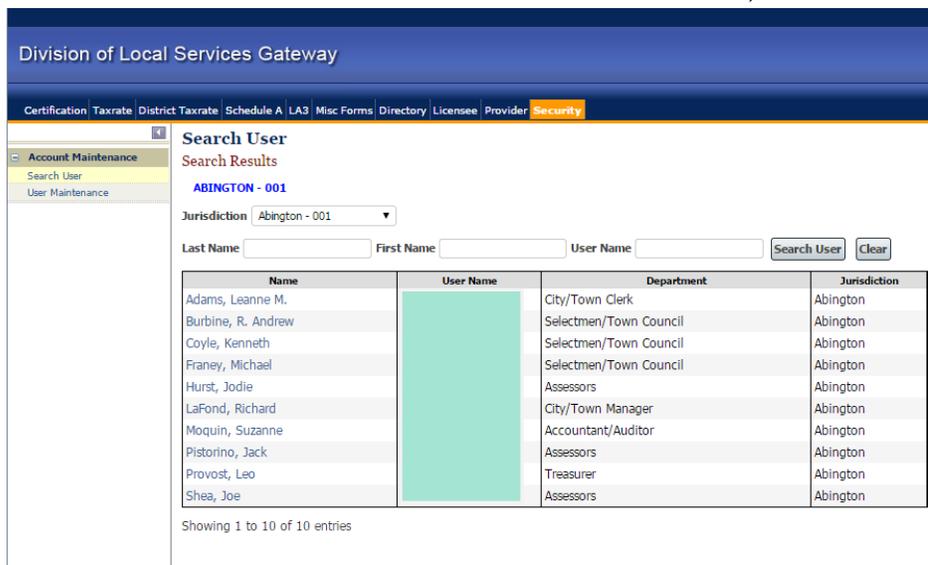
Not all officials need a Gateway account. Officials that work on forms required by the Division of Local Services will need an account; officials that don't typically send data to DLS probably don't need an account. All officials, however, can be listed in the Local Officials Directory as a public service.

Account Maintenance - Search User

The **Search User Feature** allows you to search for any user with an **active username** within a jurisdiction. You can search for a specific user or view all active users within a jurisdiction; when viewing all users, you can now change the default display to show up to 10, 25, 50 or 100 users in the Search Results.

After clicking Security on the module bar, click Search User.

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

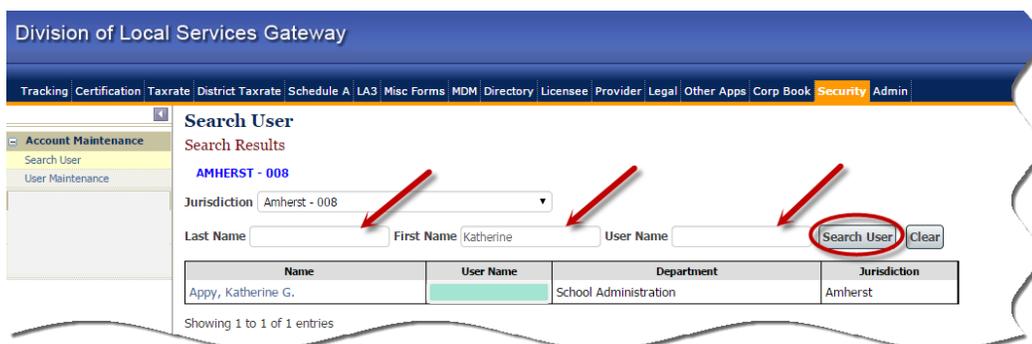
Jurisdiction: Abington - 001

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
Faney, 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

2. To display a specific user's permissions by searching for that 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.



Division of Local Services Gateway

Tracking Certification Taxrate District Taxrate Schedule A LA3 Misc Forms MDM Directory Licensee Provider Legal Other Apps Corp Book **Security** Admin

Account Maintenance
Search User
User Maintenance

Search User
Search Results

AMHERST - 008

Jurisdiction: Amherst - 008

Last Name: _____ First Name: Katherine User Name: _____

Name	User Name	Department	Jurisdiction
Appy, Katherine G.		School Administration	Amherst

Showing 1 to 1 of 1 entries

Division of Local Services Gateway

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

Account Maintenance
Search User
User Maintenance

User Maintenance

Login Modification

SANDWICH - 261

Jurisdiction: Sandwich - 261

Person: [] - Dir of Asses Inactive users in Person dropdown are indicated by ""

User Name*: [] Department: Assessors

Password*: [] Position: Dir of Assessing

Confirm Password*: [] Active:

Select a Profile: --Select a Department Type--

[Collapse](#)

Module / Sub modules	Permissions
<input type="checkbox"/> Certification	<input type="checkbox"/> None <input checked="" type="checkbox"/> Allow
<input type="checkbox"/> Certification	<input type="checkbox"/> None <input checked="" type="checkbox"/> Read <input checked="" type="checkbox"/> Save <input checked="" type="checkbox"/> Submit
<input type="checkbox"/> Directory	<input type="checkbox"/> None <input checked="" type="checkbox"/> Allow
<input type="checkbox"/> Local Official Directory	<input type="checkbox"/> None <input checked="" type="checkbox"/> Read
<input type="checkbox"/> District Taxrate	<input type="checkbox"/> None <input checked="" type="checkbox"/> Allow
<input type="checkbox"/> District Tax Rate	<input type="checkbox"/> None <input checked="" type="checkbox"/> Read <input checked="" type="checkbox"/> Save <input checked="" type="checkbox"/> Submit <input type="checkbox"/> Sign Only
<input type="checkbox"/> District Tax Rate - Reports	<input type="checkbox"/> None <input checked="" type="checkbox"/> Read
<input type="checkbox"/> LA3	<input type="checkbox"/> None <input checked="" type="checkbox"/> Allow
<input type="checkbox"/> LA3 Certification Process	<input type="checkbox"/> None <input checked="" type="checkbox"/> Read <input checked="" type="checkbox"/> Save <input checked="" type="checkbox"/> Submit <input type="checkbox"/> Sign Only
<input type="checkbox"/> LA3 EQV Process	<input type="checkbox"/> None <input checked="" type="checkbox"/> Read <input checked="" type="checkbox"/> Save <input checked="" type="checkbox"/> Submit <input type="checkbox"/> Sign Only
<input type="checkbox"/> LA3 Upload Program	<input type="checkbox"/> None <input checked="" type="checkbox"/> Read <input checked="" type="checkbox"/> Save <input checked="" type="checkbox"/> Submit <input type="checkbox"/> Sign Only
<input type="checkbox"/> Licensee	<input type="checkbox"/> None <input checked="" type="checkbox"/> Allow
<input type="checkbox"/> ALIF	<input type="checkbox"/> None <input checked="" type="checkbox"/> Read <input checked="" type="checkbox"/> Save
<input type="checkbox"/> Misc Forms	<input type="checkbox"/> None <input checked="" type="checkbox"/> Allow
<input type="checkbox"/> B of 50	<input checked="" type="checkbox"/> None <input checked="" type="checkbox"/> Read <input type="checkbox"/> Save <input type="checkbox"/> Submit
<input type="checkbox"/> Land of Low Value	<input type="checkbox"/> None <input checked="" type="checkbox"/> Read <input checked="" type="checkbox"/> Save <input type="checkbox"/> Submit <input type="checkbox"/> Sign Only
<input type="checkbox"/> Property Tax Exemptions	<input type="checkbox"/> None <input checked="" type="checkbox"/> Read <input checked="" type="checkbox"/> Save <input checked="" type="checkbox"/> Submit <input type="checkbox"/> Sign Only
<input type="checkbox"/> Year End Accounting	<input type="checkbox"/> None <input checked="" type="checkbox"/> Read <input checked="" type="checkbox"/> Save <input checked="" type="checkbox"/> Submit <input type="checkbox"/> Sign Only
<input type="checkbox"/> Provider	<input type="checkbox"/> None <input checked="" type="checkbox"/> Allow
<input type="checkbox"/> APFP	<input type="checkbox"/> None <input checked="" type="checkbox"/> Read <input checked="" type="checkbox"/> Save
<input type="checkbox"/> Schedule A	<input type="checkbox"/> None <input checked="" type="checkbox"/> Allow
<input type="checkbox"/> Schedule A	<input type="checkbox"/> None <input checked="" type="checkbox"/> Read <input type="checkbox"/> Save <input type="checkbox"/> Submit <input type="checkbox"/> Sign Only
<input type="checkbox"/> Schedule A Reports	<input type="checkbox"/> None <input checked="" type="checkbox"/> Read
<input type="checkbox"/> Security	<input checked="" type="checkbox"/> None <input type="checkbox"/> Allow
<input type="checkbox"/> Account Maintenance	<input checked="" type="checkbox"/> None <input type="checkbox"/> Read
<input type="checkbox"/> Taxrate	<input type="checkbox"/> None <input checked="" type="checkbox"/> Allow
<input type="checkbox"/> Tax Rate - BLA	<input type="checkbox"/> None <input checked="" type="checkbox"/> Read <input checked="" type="checkbox"/> Save <input checked="" type="checkbox"/> Submit <input type="checkbox"/> Sign Only
<input type="checkbox"/> Tax Rate - BOA	<input type="checkbox"/> None <input checked="" type="checkbox"/> Read <input checked="" type="checkbox"/> Save <input checked="" type="checkbox"/> Submit <input type="checkbox"/> Sign Only
<input type="checkbox"/> Tax Rate - Reports	<input type="checkbox"/> None <input checked="" type="checkbox"/> Read

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

- 122 - Selectmen/Town Council
- 123 - City/Town Manager
- 135 - Accountant/Auditor
- 145 - Treasurer
- 146 - Collector
- 155 - Data Processing/Mis/It
- 161 - City/Town Clerk
- 210 - Police
- 220 - Fire
- 291 - Emergency Management
- 411 - Fininere

Selected Department(s)

- 141 - Assessors

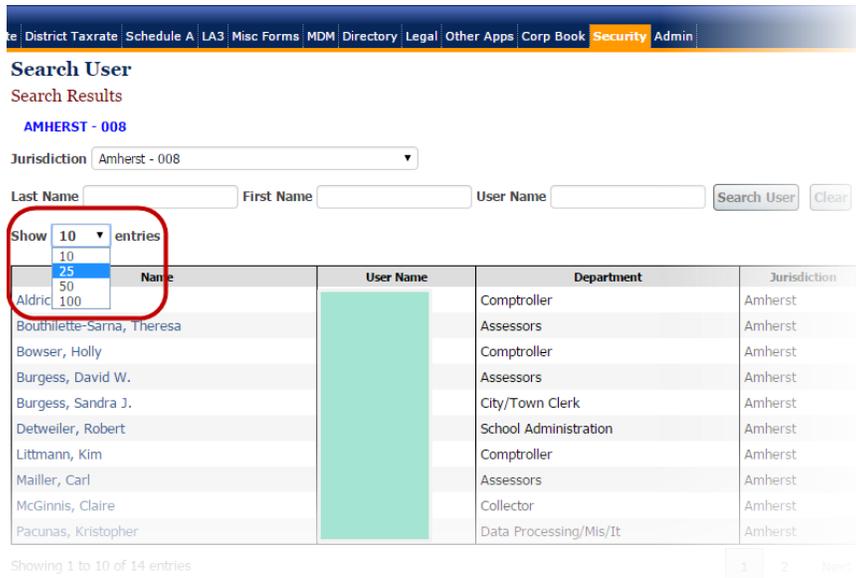
User Maintenance screen

See the *Account Maintenance - User Maintenance* section of this guide for information about this screen.

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.

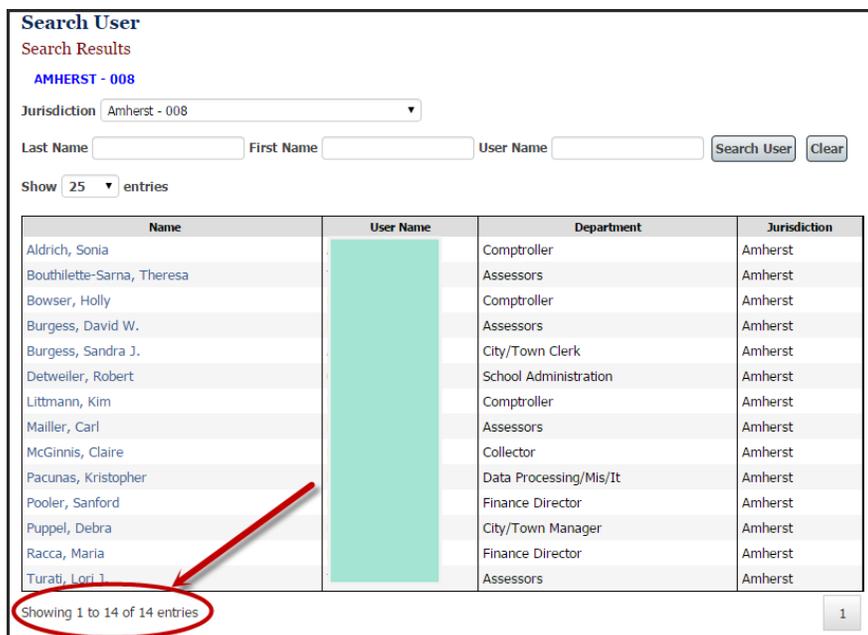
1. Click the **Show entries** dropdown menu and scroll to the number of entries you wish to display on one page.



The screenshot shows the 'Search User' interface for 'AMHERST - 008'. The 'Jurisdiction' is set to 'Amherst - 008'. There are input fields for 'Last Name', 'First Name', and 'User Name', along with 'Search User' and 'Clear' buttons. A dropdown menu for 'Show entries' is open, showing options 10, 25, 50, and 100. The number 25 is selected. Below the dropdown is a table with columns: Name, User Name, Department, and Jurisdiction. The table lists 14 entries, with the 'User Name' column redacted. The status bar at the bottom indicates 'Showing 1 to 10 of 14 entries' and has pagination controls for 1, 2, and Next.

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

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.



The screenshot shows the 'Search User' interface for 'AMHERST - 008' with the 'Show entries' dropdown set to 25. The table now displays 14 entries, with the 'User Name' column redacted. A red arrow points to the 'Showing 1 to 14 of 14 entries' status bar, which is circled in red. The pagination controls show '1'.

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

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.

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 **Active** 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 Inactive.
 - b. Unchecking the Active checkbox in User Maintenance to make a user inactive will automatically remove the official from LOD.
 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.

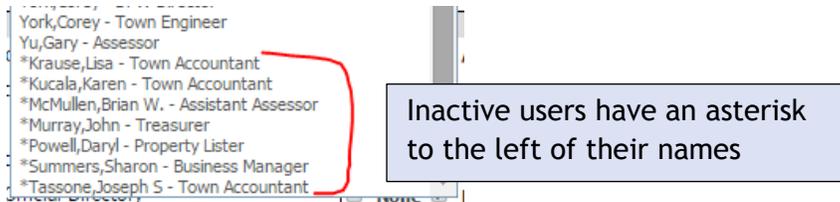
User Maintenance
Login Modification
AMHERST - 008

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
- Gelyk, Maria - Superintendent of Schools
- Hayden, Aaron A. - Redevelopment Authority
- Hayden, Aaron A. - Select Board



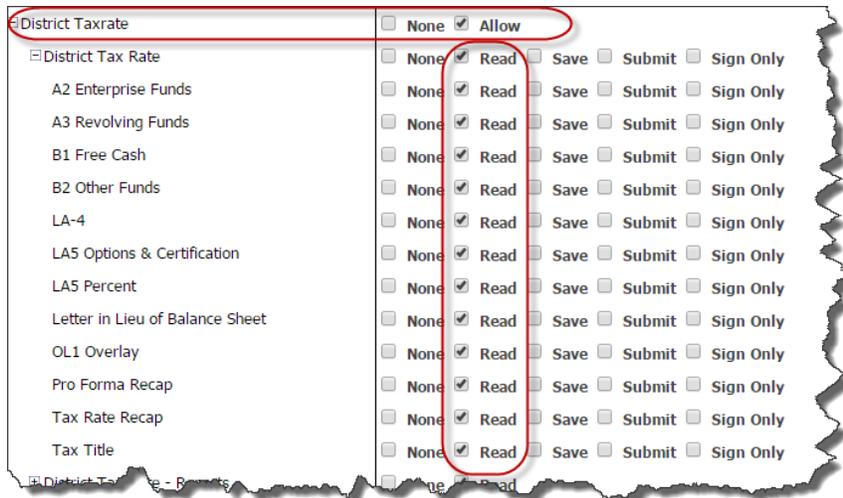
- a. For a new user: complete the **User Name** (not case-sensitive), **Password** (any combination of letters and numbers, 6-8 characters in length) and **Confirm Password** fields. The **Department** and **Position** fields are automatically filled with information from the Local Officials Directory.

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

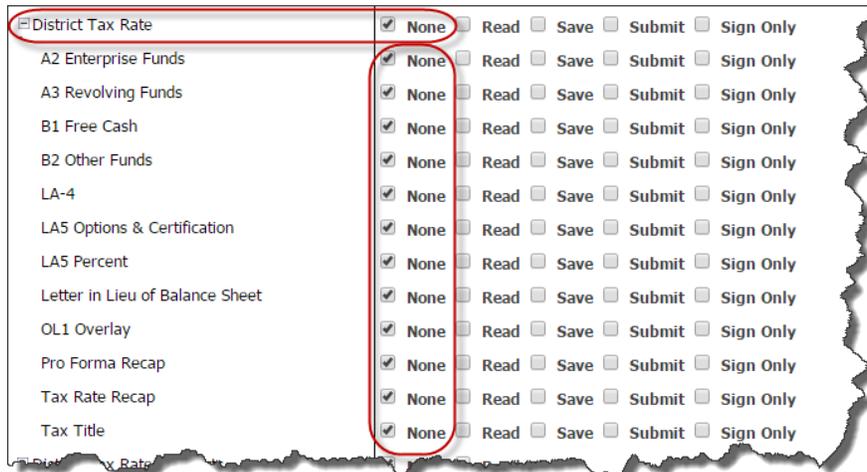
- b. The permissions currently set for the user are checked. *New user permissions are defined as **None** by default.*

★ **NOTE:** Beginning with this new release, the Permissions modules/submodules are now shown in hierarchical order. Permissions must also be set independently; there is no longer an “implied” cascading of rights. See the details below for an explanation.

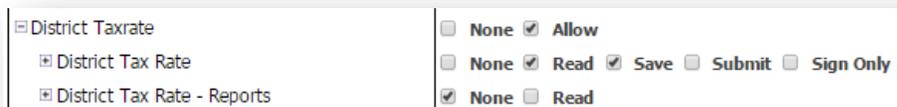
- c. To grant a user access to a top level (level one) module, click the Allow checkbox.
- d. To view the permissions underneath a level one module, click on the + next to the left of the module name. The level two (submodule) permissions will expand underneath the module. *Note: Only levels 1 and 2 are in effect for the January release. Rights at level 3 and below will be active in a future release.*
- e. Click the checkboxes associated with the permissions you wish to give the user.
- f. **NEW:** Permissions must now be explicitly set for each module/submodule. For example, granting a user **Submit** permission does not automatically give users permission to **Save**. This will allow greater flexibility at the local level, to more accurately reflect the real job responsibilities of local officials and their staff. There is still 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.



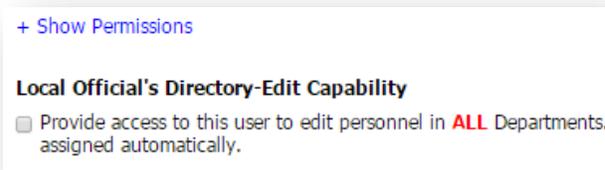
ii. Likewise, if a user's rights to a level one or two module are changed to **None**, all rights to its submodules are changed to **None** as well.



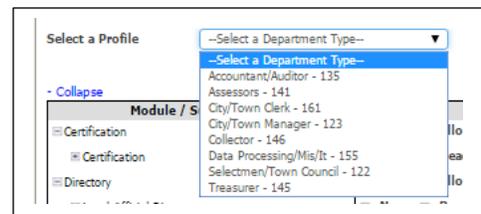
iii. Granting a user any rights higher than **Read** for modules or submodules automatically grants **Read** rights.



- 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 that you can use to set up the account.



Select the department type matching the official's position 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.

NOTE: 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.
- ★ Note: saving account changes prior to selecting LOD departments is no longer required. Changing LOD options will not refresh the screen in Gateway 2.0, so you don't need to save the other options before selecting LOD access options.

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 Planner/Planning Board

Selected Department(s)

- 114 - Moderator
- 122 - Selectmen/Town Council
- 23 - City/Town Manager
- 41 - Assessors

Buttons: >, >>, <, <<

Save

- 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.
- 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

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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

> >> < <<

move all items from right to left

Save

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