

MSRB Gateway User Manual for Dealers and Municipal Advisors

Version 2.0, December 2019



Revision History

Version	Date	Description of Changes
1.0	April 2012	Initial version. Created to accommodate increased account management for Issuers, Obligated Persons and Agents.
1.1	July 2012	Updated Gateway Main Menu images.
1.2	November 2012	Updated language to reflect Optional G-40 Contacts have similar functional to Primary G-40 Contacts and updated screenshots which show the validation checkbox on the Primary G-40 contact's information.
1.3	May 2014	Information on registration functionality is now available in the MRSB Registration Manual to reflect changes to the process under MSRB Rule A-12.
1.4	August 2015	Updated the Resources and Support section to reflect the change in hours of operation for Email Support.
1.5	June 2016	Updated to reflect the user navigation changes to the MSRB.org homepage, MSRB Gateway Login and Main Menu pages.
2.0	December 2019	Updated to reflect changes to the MSRB.org homepage and Account Administrator role.

Resources and Support

MSRB Website: www.MSRB.org

EMMA Website: EMMA.MSRB.org

For assistance, contact MSRB Support at 202-838-1330 or MSRBsupport@msrb.org.

Live Support: 7:30 a.m.–6:30 p.m. ET

Email Support: 7:00 a.m.–7:00 p.m. ET

Municipal Securities Rulemaking Board

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Introduction

The Municipal Securities Rulemaking Board (MSRB) protects investors, issuers of municipal securities, entities whose credit stands behind municipal securities and public pension plans by promoting a fair and efficient municipal market. The MSRB fulfills this mission by regulating securities firms, banks and municipal advisors that engage in municipal securities and advisory activities. To further protect market participants, the MSRB promotes disclosure and market transparency through its Electronic Municipal Market Access (EMMA[®]) website, provides education and conducts extensive outreach. The MSRB has operated under Congressional mandate with oversight by the U.S. Securities and Exchange Commission (SEC) since 1975.

The EMMA website is a centralized online database operated by the MSRB that provides free public access to official disclosure documents and trade data associated with municipal bonds issued in the United States. In addition to current credit rating information, the EMMA website also makes available real-time trade prices and primary market and continuing disclosure documents for over one million outstanding municipal bonds, as well as current interest rate information, liquidity documents and other information for most variable rate municipal securities.

MSRB Gateway serves as a secure access point for MSRB systems. Dealers and municipal advisors are required to register with the MSRB via the online registration process in Gateway before an MSRB Gateway accounts are created¹. Once the MSRB Gateway account is created, the Master Account Administrator and Account Administrator can add additional user accounts to their organization and grant access rights to various MSRB systems to those users.

Staff of dealers and municipal advisors who have been granted user rights by their account administrators can use MSRB Gateway to access all MSRB systems including, but not limited to, the systems listed below.

- Electronic Municipal Market Access Dataport
- Real-time Transaction Reporting System (RTRS) Web
- Short-term Obligation Rate Transparency (SHORT) System
- MSRB Form G-37 Submission Portal

¹The MSRB Registration Manual provides instructions on how to complete the MSRB registration process using MSRB Form A-12 in MSRB Gateway. To begin the registration process, visit the MSRB website at [MSRB.org](https://www.msrb.org).

Dealers can grant appointed agents access to Gateway to submit documents or information to the MSRB on their behalf (e.g., primary market documents in connection with the MSRB's EMMA system). Dealers can also grant MSRB Gateway access to program dealers, remarketing agents, auction agents and designated agents for submitting information to MSRB's SHORT system.

The groups feature in MSRB Gateway makes user account management easier for large organizations. This feature allows the Master Account Administrator to create smaller groups of users that are managed by a group account administrator.

Part 1: Gateway Accounts

MSRB Gateway accounts are created as part of the Form A-12 process or by an individual designated by the dealer or municipal advisor.

Master Account Administrator

[MSRB Rule A-12](#), requires each broker, dealer, municipal securities dealer or municipal advisor to appoint a Master Account Administrator, and the Gateway account for the Master Account Administrator is created during the MSRB registration process. Certain functions, such as agent designation or the creation and management of groups can only be performed by the Master Account Administrator.

Account Administrator

The Master Account Administrator may appoint one or more Account Administrators to assist them with account management functions.

Self Management by Users

Certain data can be edited by any users on their own account, including email address, mailing address, and phone numbers

Access MSRB Gateway

To access MSRB Gateway, an MSRB Gateway account with a valid User ID and password is required. If you do not have a Gateway account and you are a broker, dealer, municipal securities dealer or municipal advisor, contact an account administrator to create your MSRB Gateway account.

Go to [MSRB.org](https://www.msrb.org) and click **Login**.

The screenshot shows the MSRB website homepage. At the top right, there is a navigation menu with links for ABOUT MSRB, EMMA®, MUNIEDPRO®, LOGIN, REGISTER, and CAREERS. The LOGIN link is highlighted with a red box, and a red arrow points to it from below. Below the navigation menu is a search bar. The main content area features a large banner with the text "MSRB Submits EMMA® Facility Filing with the SEC" and "Investor's Guide for ABLÉ Programs". Below the banner are four main navigation buttons: MARKET EDUCATION (with MuniEdPro logo), ABOUT THE MSRB (with a play button icon), MSRB RULES (with a scale icon), and VISIT THE EMMA WEBSITE (with EMMA 10 YEARS logo). At the bottom, there is a "Latest News" section with a tweet from @MSRB_News about taxable securities, and two other promotional boxes: "Investor Brochure" and "Municipal Advisory Client Brochure".

Enter your **User ID** and **Password** and then click the **Login** button.

MSRB Home | Contact and Support

MSRB
Municipal Securities Rulemaking Board

Log into MSRB Gateway

User ID
jdoe5

Password
.....

[Forgot password?](#)

Login

[Don't have an account? Register](#)

[MSRB Gateway Manual](#)

Welcome to MSRB Gateway, the secure access point for all MSRB applications including EMMA. [Click here](#) for guidance on user account management and information about the MSRB Gateway.

To return to MSRB.org from within the MSRB Gateway application, click on the MSRB Home link at the top right corner of the page.

If you are experiencing login or other system related problems, please check the [Systems Status Page](#) for more information. If you need additional help, please contact the MSRB via email at GatewaySupport@msrb.org or by phone at 202-838-1330

[Access Online Training about Submitting to EMMA](#)

The MSRB recommends not bookmarking this page.

[Terms and Conditions](#) | [Privacy Statement](#) | [Site Map](#)

You will be directed to the MSRB Gateway Main Menu.

MSRB Gateway Main Menu

Welcome to MSRB Gateway! Your User Account has the following access rights:

Market Transparency Systems

- EMMA Dataport


Account and Organization Management

- View Account Administrators
- Manage Continuing Disclosure Confirmation Requests

Making Submissions to the EMMA Website or other Transparency Systems

MSRB Gateway provides links to all MSRB programs for submission of market data and disclosures. Links to the relevant applications may be found on the main Gateway page under the Market Transparency Systems heading. Clicking on the links will take you out of Gateway.

MSRB Gateway Main Menu
 Welcome to MSRB Gateway! Your User Account has the following access rights:

Market Transparency Systems 

Access MSRB systems to submit documents and data related to municipal market activity and political contributions.

- Dealer System Outage Reporting
- SHORT System Web User Interface – Data Submissions
- SHORT System Web User Interface – Data Submissions Test Environment
- RTRS Web Interface - Test System
- Rule G-37 Submission
- EMMA Dataport

Dealer Feedback System

- Transaction Data Request Form

Account and Organization Management

- Manage User Accounts
- View Account Administrators
- Manage Groups
- Manage Continuing Disclosure Confirmation Requests
- Manage Consolidations



If you do not see a link to the system you need to access, it is because your account has not been granted the required access right. If you are an account administrator, you may grant yourself the appropriate right. Otherwise, you will need to contact a person at your firm with account administration rights.

Part 2: Account Administration

Gateway account administrators can perform the following account management functions to in Gateway:

- Create new users;
- Disable user accounts;
- Re-enable user accounts;
- Modify user account details.
- Grant user account access rights; and

Account management functions are performed on the User Account screen.

Use the steps below to navigate to this screen. Follow these steps whenever updates are made to a user's account and refer to this section for navigation guidance as these steps will not always repeat for each scenario illustrated in this section.

After updates are made to a user's account, click through the screens to continue with the updates and confirm the changes. An email is forwarded to the user informing them of the changes to their account.



Firms should diligently remove access to MSRB Gateway as soon as practical for any individual who is no longer employed by the firm.

Access User Accounts

From the MSRB Gateway Main Menu, click **Manage User Accounts** under the **Account and Organization Management** section to be directed to the User Account screen.

MSRB Gateway Main Menu
Welcome to MSRB Gateway! Your User Account has the following access rights:


Market Transparency Systems
Access MSRB systems to submit documents and data related to municipal market activity and political contributions.

- Dealer System Outage Reporting
- SHORT System Web User Interface – Data Submissions
- SHORT System Web User Interface – Data Submissions Test Environment
- RTRS Web Interface - Test System
- Rule G-37 Submission
- EMMA Dataport

Dealer Feedback System

- Transaction Data Request Form

Account and Organization Management

- Manage User Accounts 
- View Account Administrators
- Manage Groups
- Manage Continuing Disclosure Confirmation Requests
- Manage Consolidations

The User Accounts screen displays all users in the organization on the right side of the screen. From this list, double-click the user account that you would like to edit.



If a user has a Gateway account and the account is not displayed, the account may be disabled and will need to be re-enabled.

User Accounts

The following are User Accounts for your company. Depending on your MSRB Gateway Access Rights, you can add, edit, or disable User Accounts, and search for User Accounts by name, email, or by Group. To view details, select the desired User Account from the list. Please be advised that all actions taken on MSRB systems by a user through a User Account established for your company shall be your company's responsibility.

Search for a user:

By first name:

By last name:

By email:

By Right:

By Group: [Manage Groups](#)

Show disabled User Accounts:

[Search](#) [Reset](#)

[Add New Account](#)

Showing (1 - 3) of 3

User Name	Last Updated By	Last Updated On
<input checked="" type="checkbox"/> Betty Doe	JDOE23	6/22/2012 10:51:36 AM
<input checked="" type="checkbox"/> JOHN DOE	JDOE23	6/22/2012 10:51:36 AM
<input checked="" type="checkbox"/> Mike Doe	JDOE23	6/22/2012 10:51:36 AM

[Return to Main Menu](#)
[Edit Groups](#)

Click the **Edit User Account** button.

User Account Profile and Access Rights

Account Details

User ID: JDOE1

User Name: JOHN DOE

MSRB ID: G0000B

Email Address: jdoe1@dealerxyz.com

Title:

Department:

Address: 123 MAIN STREET
CITY, ST 12345
US

Phone Number: 123-456-7890 **Ext.** 11

Fax Number:

Last Updated by: JDOE1 **On:** 4/23/2019 1:33:37 PM

Account Access Rights

You have the following Access Rights in MSRB Gateway:

EMMA Continuing Disclosure Submissions [?]

EMMA Form G-45 Submissions [?]

EMMA Primary Market Submissions [?]

EMMA Voluntary Financial Information [?]

EMMA Voluntary OS/ARD Submission [?]

EMMA Voluntary Preliminary OS Submission [?]

Electronic G-37 [?]

Master Account Administrator [?]

SHORT System [?]

[View Profile History](#) [View Rights History](#) [Edit User Account](#)

[Return to Accounts](#) [Manage Groups](#) [Manage Groups by User](#) [Return to Main Menu](#)

Update User Account and Save Changes

Make the appropriate updates to the user account and then click **Continue**. You may also click the **Return to Accounts** button to discard changes made to the user account.

Edit User Account

Account Details

User ID: JDOE1
MSRB ID: G0000B
Group(s): No groups set up.
First Name*: JOHN
Middle Name:
Last Name*: DOE
Email Address*:
Confirm Email*:
Title:
Department:
Phone Number*: - - Ext.
Fax Number: - -
Address1*:
Address2:
City*:
State*:
Zip*:
Country:

*required

Account Access Rights

Select the Access Rights to assign to your User Account.
You will have the following Access Rights in MSRB Gateway:

- EMMA Continuing Disclosure Submissions** [?]
- EMMA Form G-45 Submissions** [?]
- EMMA Primary Market Submissions** [?]
- EMMA Voluntary Financial Information** [?]
- EMMA Voluntary OS/ARD Submission** [?]
- EMMA Voluntary Preliminary OS Submission** [?]
- Electronic G-37** [?]
- Master Account Administrator** [?]
- SHORT System** [?]

[Continue](#)
[Return to Account Profile](#)

[Return to Accounts](#)
[Return to Main Menu](#)

If you accept the updates made to the user account, click the **Continue** button. Then click the **Confirm User Account** to complete the update to the user account.

Confirm User Account

Account Details

User ID: BDOE1
User Name: BETTY DOE
MSRB ID: A9999
Email Address: bdoe1@dealerxyz.com
Title:
Department:
Address: 123 MAIN STREET
CITY, ST 12345
US
Phone Number: 123-456-7890
Fax Number:

[Confirm User Account](#)
[Edit User Account](#)

[Return to Main Menu](#)

Confirm Updates Made to User Account

After the updates to a user account are saved, a confirmation screen will appear.

User Account Update Results

The following User Account was successfully updated. An email confirmation was sent to the user.

User ID: JDOE1
MSRB ID: G0000B
Name: JOHN DOE
Email Address: jdoe1@dealerxyz.com

[Return to Accounts](#) [Return to Main Menu](#)

An email confirmation is sent to the account holder that notes the updates made to their account, as well as who made the updates.

Please keep this information confidential to prevent unauthorized use of this account.

The MSRB account registered for this email address: kdoe@dealerxyz.com has been updated by James Doe (JDOE14)

You may login and check your account details and update history by going to: <http://www.msrb.org/msrb1/control/default.asp>

This is a system-generated e-mail PLEASE DO NOT REPLY. REPLIES ARE NOT MONITORED. If you need assistance with your account please contact an account manager at your organization. You may also obtain more information about MSRB Gateway at: <https://www.msrb.org/msrb1/control/default.asp>.

Create New User Account

From the User Accounts screen click the **Add New Account** button.

User Accounts

The following are User Accounts for your company. Depending on your MSRB Gateway Access Rights, you can add, edit, or disable User Accounts, and search for User Accounts by name, email, or by Group. To view details, select the desired User Account from the list. Please be advised that all actions taken on MSRB systems by a user through a User Account established for your company shall be your company's responsibility.

Search for a user:

By first name:

By last name:

By email:

By Right:

By Group: [Manage Groups](#)

Show disabled User Accounts:

[Search](#) [Reset](#)

[Add New Account](#)

Showing (1 - 2) of 2

User Name	Last Updated By	Last Updated On
<input checked="" type="checkbox"/> JANE DOE	JDOE14	6/2/2012 7:54:46 PM
<input checked="" type="checkbox"/> James Doe	JDOE14	6/2/2012 7:27:04 PM

Enter the account details for the user on the left side of the screen. Select the account access rights you would like to grant the user on the right side of the screen.

- Users who are granted Account Administrator rights will be an Account Administrator and will have access to other users' accounts in the organization.
- At least one account access right must be granted to a user to keep the account active. If no account access rights are granted, the account will be disabled.
- To read a description of an access right, click the [?] icon located next to each account access right listed.

Add User Account

Complete all required information below and assign one or more Access Rights to create a new User Account. If no Access Rights are given, the User Account will be automatically disabled.

<p>Account Details</p> <p>MSRB ID: A7260</p> <p>Group(s): No groups set up.</p> <p>First Name:* <input type="text" value="Chris"/></p> <p>Middle Name: <input type="text"/></p> <p>Last Name:* <input type="text" value="Doe"/></p> <p>Email Address:* <input type="text" value="cdoe@dealenyz.com"/></p> <p>Confirm Email:* <input type="text" value="cdoe@dealenyz.com"/></p> <p>Title: <input type="text"/></p> <p>Department: <input type="text"/></p> <p>Phone Number:* <input type="text" value="111"/> - <input type="text" value="222"/> - <input type="text" value="3333"/> Ext. <input type="text"/></p> <p>Fax Number: <input type="text"/> - <input type="text"/> - <input type="text"/></p> <p>Address1:* <input type="text" value="101 Main Street"/></p> <p>Address2: <input type="text"/></p> <p>City:* <input type="text" value="City"/></p> <p>State:* <input type="text" value="ST"/></p> <p>Zip:* <input type="text" value="12345"/></p> <p>Country: <input type="text"/></p> <p><small>*required</small></p>	<p>Account Access Rights</p> <p>Select the Access Rights to assign to this User Account.</p> <p>This user will have the following Access Rights in MSRB Gateway:</p> <p>Account Administrator <input type="checkbox"/> [?]</p> <p>SHORT System <input checked="" type="checkbox"/> [?]</p> <p>EMMA Primary Market Submissions <input checked="" type="checkbox"/> [?]</p> <p>Agent Designation <input type="checkbox"/> [?]</p> <p>EMMA Continuing Disclosure Submissions <input type="checkbox"/> [?]</p> <p>Electronic G-37 <input type="checkbox"/> [?]</p>
--	---

[Continue](#)

[Return to Accounts](#) [Return to Main Menu](#)

After the user account has been created, click the **Continue** button to accept the changes and then click the **Confirm User Account** button on the following screen to confirm the new account.

After the Gateway account has been created, the new user will receive an email with a User ID and a link to create a password to access the new Gateway account.

Grant User Account Access Rights

Gateway User Account Access rights are granted to a user by an Account Administrator, with the exception of the Account Administrator access right. This right can only be granted by the Master Account Administrator.

The following is a list of user account access rights that can be granted in Gateway²:

Account Administrator	This right can only be granted by the Master Account Administrator. Users with this right can manage other users' accounts. They can perform most functions of the Master Account Administrator, but not all.
Dealer Feedback System	This right provides access to the application used by dealers to request transaction data about their own trades.
Dealer System Outage Report User	This right provides access to the application used by dealers to report system outages.
EMMA Continuing Disclosure Submissions	This right provides access to make continuing disclosure filings.
EMMA Primary Market Submissions	This right provides access to submit official statements and advanced refunding documents.
Electronic G-37 Submissions	This right provides access to make political contribution filings.
EMMA Form G-45 Submissions	Allows access to make submissions for 529 Savings Plan and ABLE Programs
RTRS Web	Allows access to RTRS Web for all functions, including input or correction of trade reports.

²The list of rights shown is typical but subject to change. Additional rights may appear if your organization has been designated as an agent to make submissions on behalf of another organization. If you believe rights are missing, or are uncertain about a right listed, please contact MSRB Support at 202-838-1330.

RTRS Web View Only	Allows limited access to RTRS Web for viewing and reports.
SHORT System	Allows access to make auction rate and variable rate submissions.



Some users may see *Other Form A-12 Submitter*. This designation indicates a role that is assigned through Form A-12, such as Data Quality Contact or Optional Regulatory Contact.

Follow these steps to grant user account access rights:

Navigate to the User Accounts screen and select the user to whom you will grant account access rights. Once the Account Profile is displayed, click **Edit User Accounts**.

User Accounts

The following are User Accounts for your company. Depending on your MSRB Gateway Access Rights, you can add, edit, or disable User Accounts, and search for User Accounts by name, email, or by Group. To view details, select the desired User Account from the list. Please be advised that all actions taken on MSRB systems by a user through a User Account established for your company shall be your company's responsibility.

Search for a user:

By first name:

By last name:

By email:

By Right:

By Group: [Manage Groups](#)

Show disabled User Accounts:

[Search](#) [Reset](#)

[Add New Account](#)

Showing (1 - 4) of 4

User Name	Last Updated By	Last Updated On
<input checked="" type="checkbox"/> BETTY DOE	JDOE23	6/22/2012 1:48:48 PM
<input checked="" type="checkbox"/> CHRIS DOE	JDOE23	6/22/2012 1:57:34 PM
<input checked="" type="checkbox"/> JOHN DOE	JDOE23	6/22/2012 10:51:36 AM
<input checked="" type="checkbox"/> Mike Doe	JDOE23	6/22/2012 10:51:36 AM

[Return to Main Menu](#)

[Edit Groups](#)

Click the account access right(s) you would like to grant the user. Please note your organization will only be able to see and select the account access rights inherent to your organization type.

Edit User Account

Account Details

User ID: CDOE
MSRB ID: A7260
Group(s): No groups set up.
First Name: CHRIS
Middle Name:
Last Name: DOE
Email Address:
Confirm Email:
Title:
Department:
Phone Number: - - **Ext.**
Fax Number: - -
Address1:
Address2:
City:
State:
Zip:
Country:

*required

Account Access Rights

Select the Access Rights to assign to this User Account.
This user will have the following Access Rights in MSRB Gateway:

Account Administrator [?]
Agent Designation [?]
EMMA Continuing Disclosure Submissions [?]
EMMA Primary Market Submissions [?]
Electronic G-37 [?]
SHORT System [?]


Force password change on next login.
 Disable the user account.

[Continue](#) [Return to Account Profile](#)

[Return to Accounts](#) [Return to Main Menu](#)

Save and confirm the updates. Users can view access rights they have been granted by expanding the **Market Transparency Systems** link on the Gateway Main Menu.

Users can determine their role as indicated in the **User Details Dropdown** box by clicking on User Name.



[MSRB Home](#) | [Contact and Support](#)

Welcome JDOE5 A9999. [Logout](#)

User ID: JDOE5
Role: Master Account Administrator
User Name: JOHN DOE
Organization Name: Dealer XYZ
MSRB ID: A9999
Email Address: jdoe5@dealxyz.com

[Edit Profile](#) [Change Password](#)

MSRB Gateway Main Menu

Welcome to MSRB Gateway! Your User Account has the following access rights:

Market Transparency Systems

Access MSRB systems to submit documents and data related to municipal market activity and political contributions.

- Dealer System Outage Reporting
- SHORT System Web User Interface – Data Submissions
- SHORT System Web User Interface – Data Submissions Test Environment
- RTRS Web Interface - Test System
- Rule G-37 Submission
- EMMA Dataport

Disable User Account

- A user with a disabled account can no longer access Gateway and will no longer appear on the organization's User Account Screen.
- If a user leaves the organization, or you would like to restrict a user from accessing their Gateway account, an Account Administrator can disable the account.
- A user's account will also disable automatically if no account access rights are granted to that user.
- Disabling a user account will not delete the user from Gateway; once a user account is created, it can never be deleted.
- A user's disabled account can be re-enabled at any time.



If the user has left the organization, make sure to remove all user rights before you disable the user account. If the account is not disabled, the user may still receive notification emails from the MSRB to the email address associated with the Gateway user account.

Use the following steps to disable a user account:

Navigate to the **User Accounts** screen and double-click the user you wish to disable. Click **Edit User Account**.

User Accounts

The following are User Accounts for your company. Depending on your MSRB Gateway Access Rights, you can add, edit, or disable User Accounts, and search for User Accounts by name, email, or by Group. To view details, select the desired User Account from the list. Please be advised that all actions taken on MSRB systems by a user through a User Account established for your company shall be your company's responsibility.

Search for a user:

By first name:

By last name:

By email:

By Right:

By Group: [Manage Groups](#)

Show disabled User Accounts:

[Search](#) [Reset](#)

[Add New Account](#)

Showing (1 - 4) of 4

User Name	Last Updated By	Last Updated On
<input checked="" type="checkbox"/> BETTY DOE	JDOE23	6/22/2012 1:48:48 PM
<input checked="" type="checkbox"/> CHRIS DOE	JDOE23	6/22/2012 1:57:34 PM
<input checked="" type="checkbox"/> JOHN DOE	JDOE23	6/22/2012 10:51:36 AM
<input checked="" type="checkbox"/> Mike Doe	JDOE23	6/22/2012 10:51:36 AM

[Return to Main Menu](#)

[Edit Groups](#)

Click the checkbox next to **Disable the user account** and then click the **Continue** button.

Edit User Account

Account Details

User ID: CDOE
MSRB ID: A7260
Group(s): No groups set up.
First Name:* CHRIS
Middle Name:
Last Name:* DOE
Email Address:* cdoe@dealxyz.com
Confirm Email:* cdoe@dealxyz.com
Title:
Department:
Phone Number:* 111 - 222 - 3333 **Ext.**
Fax Number: - -
Address1:* 101 MAIN STREET
Address2:
City:* CITY
State:* ST
Zip:* 12345
Country:

*required

Account Access Rights

Select the Access Rights to assign to this User Account.
This user will have the following Access Rights in MSRB Gateway:

Account Administrator [?]
Agent Designation [?]
EMMA Continuing Disclosure Submissions [?]
EMMA Primary Market Submissions [?]
Electronic G-37 [?]
SHORT System [?]

Force password change on next login.
 Disable the user account.

[Continue](#) [Return to Account Profile](#)

[Return to Accounts](#) [Return to Main Menu](#)

Click the **Confirm User Account** button to disable the user account.

Confirm User Account

Account Details

User ID: CDOE
User Name: CHRIS DOE
MSRB ID: A7260
Group(s):
Email Address: cdoe@dealxyz.com
Title:
Department:
Address: 101 MAIN STREET
CITY, ST 12345
Phone Number: 111-222-3333
Fax Number:

Account Access Rights:

This User Account will be disabled.
Click on "Confirm User Account" to complete the process.

[Confirm User Account](#) [Edit User Account](#)

[Return to Accounts](#) [Return to Main Menu](#)

A confirmation screen will appear confirming the account has been disabled. The user of the disabled user account will receive an email stating their account has been disabled.

User Account Update Results

The following User Account was successfully disabled. An email confirmation was sent to the user.

User ID: CDOE
MSRB ID: A7260
Name: CHRIS DOE
Email Address: cdoe@dealerxyz.com

Return to Accounts
Return to Main Menu

Re-Enable User Account

Navigate to the User Accounts screen. Click the checkbox next to **Show disabled User Accounts** and then click the **Search** button.

User Accounts

The following are User Accounts for your company. Depending on your MSRB Gateway Access Rights, you can add, edit, or disable User Accounts, and search for User Accounts by name, email, or by Group. To view details, select the desired User Account from the list. Please be advised that all actions taken on MSRB systems by a user through a User Account established for your company shall be your company's responsibility.

Search for a user:

By first name:

By last name:

By email:

By Right:

By Group: Manage Groups

Show disabled User Accounts:

Search
Reset

Add New Account

Showing (1 - 3) of 3

User Name	Last Updated By	Last Updated On
<input checked="" type="checkbox"/> BETTY DOE	JDOE23	6/22/2012 1:48:48 PM
<input checked="" type="checkbox"/> JOHN DOE	JDOE23	6/22/2012 10:51:36 AM
<input checked="" type="checkbox"/> Mike Doe	JDOE23	6/22/2012 10:51:36 AM

Return to Main Menu
Edit Groups

A list of all user accounts will be displayed on the right. Disabled user accounts will be grayed out. Select the user account you wish to re-enable and edit the user's account.

User Accounts

The following are User Accounts for your company. Depending on your MSRB Gateway Access Rights, you can add, edit, or disable User Accounts, and search for User Accounts by name, email, or by Group. To view details, select the desired User Account from the list. Please be advised that all actions taken on MSRB systems by a user through a User Account established for your company shall be your company's responsibility.

Search for a user:

By first name:

By last name:

By email:

By Right:

By Group: [Manage Groups](#)

Show disabled User Accounts:

[Search](#) [Reset](#)

[Add New Account](#)

Showing (1 - 4) of 4

* disabled accounts shown in gray

User Name	Last Updated By	Last Updated On
<input checked="" type="checkbox"/> BETTY DOE	JDOE23	6/22/2012 1:48:48 PM
<input checked="" type="checkbox"/> CHRIS DOE	JDOE23	6/22/2012 2:14:44 PM
<input checked="" type="checkbox"/> JOHN DOE	JDOE23	6/22/2012 10:51:36 AM
<input checked="" type="checkbox"/> Mike Doe	JDOE23	6/22/2012 10:51:36 AM

[Return to Main Menu](#)
[Edit Groups](#)

Click **Edit User Account** and then de-select the **Disable the user account** by clicking on the checked box. Ensure the user is granted at least one account access right and then click the **Continue** button.

Edit User Account

Account Details

User ID: CDOE
MSRB ID: A7260
Group(s): No groups set up.
First Name:* CHRIS
Middle Name:
Last Name:* DOE
Email Address:*
Confirm Email:*
Title:
Department:
Phone Number:* - - **Ext.**
Fax Number: - -
Address1:*
Address2:
City:*
State:*
Zip:*
Country:

*required

Account Access Rights

Select the Access Rights to assign to this User Account.
 This user will have the following Access Rights in MSRB Gateway:

Account Administrator [?]
Agent Designation [?]
EMMA Continuing Disclosure Submissions [?]
EMMA Primary Market Submissions [?]
Electronic G-37 [?]
SHORT System [?]

Force password change on next login.
 Disable the user account.

[Continue](#)
[Return to Account Profile](#)

[Return to Accounts](#)
[Return to Main Menu](#)

The Account Details screen will appear. Click the **Confirm User Account** button.

Confirm User Account

Account Details	Account Access Rights:
User ID: CDOE	Click on "Confirm User Account" to complete the process.
User Name: CHRIS DOE	
MSRB ID: A7260	
Group(s):	
Email Address: cdoe@dealerxyz.com	
Title:	
Department:	
Address: 101 MAIN STREET CITY, ST 12345	
Phone Number: 111-222-3333	
Fax Number:	

[Confirm User Account](#) [Edit User Account](#)

[Return to Accounts](#) [Return to Main Menu](#)

A confirmation screen will display the confirmed update. The user will receive a confirmation email indicating that their account has been re-enabled.

Part 3: Global User Management Functions

Basic account management functions are available to all users. These functions include:

- modifying user account details;
- viewing account administrators in the organization;
- viewing user account history; and
- managing passwords.

Modify User Account Details

Users can modify user information associated with their own account. Click on the User Name in the upper right section of the Gateway page and then click **Edit Profile** in the User Details Dropdown box.

The screenshot displays the MSRB Gateway user interface. At the top left is the MSRB logo (Municipal Securities Rulemaking Board). At the top right are links for "MSRB Home" and "Contact and Support". Below the logo, the user is greeted with "Welcome JDOE5 ▲ A9999" and a "Logout" link. The main content area is divided into two sections. On the left, under "MSRB Gateway Main Menu", there is a list of "Market Transparency Systems" including Dealer System Outage Reporting, SHORT System Web User Interface (Data Submissions and Test Environment), RTRS Web Interface (Test System), Rule G-37 Submission, and EMMA Dataport. On the right, a user profile dropdown menu is open, showing the following information: User ID: JDOE5, Role: Master Account Administrator, User Name: JOHN DOE, Organization Name: Dealer XYZ, MSRB ID: A9999, and Email Address: jdoe5@dealerxyz.com. Two buttons are visible at the bottom of the dropdown: "Edit Profile" (highlighted with a red box) and "Change Password".

Click **Edit User Account** to view and edit your profile.

Click on the **Edit User Account** button.

User Account Profile and Access Rights

Account Details

User ID: JDOE7
User Name: JOE DOE
MSRB ID: A7380
Group(s): [Manage Groups](#)
Email Address: jdoe@dealerxyz.com
Title:
Department:
Address: 123 MAIN STREET
 CITY, ST 12345
Phone Number: 123-456-7890
Fax Number:
Last Updated by: JDOE7 **On:** 4/29/2014 9:28:47 AM

Account Access Rights

You have the following Access Rights in MSRB Gateway:

- Access to user profile** [?]
- Agent Designation** [?]
- Dealer Feedback System** [?]
- Dealer System Outage Report User** [?]
- EMMA Continuing Disclosure Submissions** [?]
- EMMA Primary Market Submissions** [?]
- Electronic G-37** [?]
- Master Account Administrator** [?]
- Other Form A-12 Submitter** [?]
- RTRS Web** [?]
- RTRS Web View Only** [?]
- SHORT System** [?]

[View Profile History](#)
 [View Rights History](#)
 [Edit User Account](#)

[Return to Accounts](#)
 [Manage Groups](#)
 [Manage Groups by User](#)
 [Return to Main Menu](#)

Make edits to the appropriate account details as needed and then click the **Continue** button.

Edit User Account

Account Details

User ID: JDOE7
MSRB ID: A7380
First Name:* JOE
Middle Name:
Last Name:* DOE
Email Address:*
Confirm Email:*
Title:
Department:
Phone Number:* - - **Ext.**
Fax Number: - -
Address1:*
Address2:
City:*
State:*
Zip:*
Country:

*required

Account Access Rights

Select the Access Rights to assign to your User Account.
 You will have the following Access Rights in MSRB Gateway:

- Access to user profile** [?]
- Agent Designation** [?]
- Dealer Feedback System** [?]
- Dealer System Outage Report User** [?]
- EMMA Continuing Disclosure Submissions** [?]
- EMMA Primary Market Submissions** [?]
- Electronic G-37** [?]
- Master Account Administrator** [?]
- Other Form A-12 Submitter** [?]
- RTRS Web** [?]
- RTRS Web View Only** [?]
- SHORT System** [?]

[Continue](#)
 [Return to Account Profile](#)

[Return to Accounts](#)
 [Return to Main Menu](#)

Review the changes and then click the **Confirm User Account** button.

Confirm User Account

<p>Account Details</p> <p>User ID: JDOE7 User Name: JOE DOE MSRB ID: A7380 Group(s): Email Address: jdoe@dealerxyz.com Title: Department: Address: 123 MAIN STREET CITY, ST 12345</p> <p>Phone Number: 123-456-7890 Fax Number:</p>	<p>Account Access Rights:</p> <p>Click on "Confirm User Account" to complete the process.</p>
---	--

Confirm User Account
Edit User Account

Return to Accounts
Return to Main Menu

Changes made to the account profile take effect immediately.

User Account Update Results

The following User Account was successfully updated. An email confirmation was sent to the user.

User ID: JDOE7
MSRB ID: A7380
Name: JOE DOE
Email Address: jdoe@dealerxyz.com

Return to Accounts
Return to Main Menu

You will receive an email acknowledging that changes have been made to your account.

Subject: Your MSRB Gateway Account has been updated

Please keep this information confidential to prevent unauthorized use of this account.

The MSRB account registered for this email address: JDOE7 has been updated by Joe Doe (JDOE7)

You may login and check your account details and update history by going to: <https://msrb.org/msrb1/control/default.asp>

This is a system-generated e-mail PLEASE DO NOT REPLY. REPLIES ARE NOT MONITORED. If you need assistance with your account please contact an account manager at your organization. or You may also obtain more information about MSRB Gateway at: <https://msrb.org/msrb1/control/default.asp>.

View Account Administrators

Users can view Account Administrators within their organization to identify who has access rights to provide user account information or make updates to their account.



Use this function to find the person in your firm who can assist you when you require access to an MSRB system and cannot grant access rights to yourself.

Go to the MSRB Gateway Main Menu and click **Account and Company Management** to expand the dropdown menu. Click the **View Account Administrators** link.

MSRB Gateway Main Menu
Welcome to MSRB Gateway! Your User Account has the following access rights:

Market Transparency Systems
Access MSRB systems to submit documents and data related to municipal market activity and political contributions.

- Dealer System Outage Reporting
- SHORT System Web User Interface – Data Submissions
- SHORT System Web User Interface – Data Submissions Test Environment
- RTRS Web Interface - Test System
- Rule G-37 Submission
- EMMA Dataport

Dealer Feedback System

- Transaction Data Request Form

Account and Organization Management

- Manage User Accounts
- **View Account Administrators**
- Manage Groups
- Manage Continuing Disclosure Confirmation Requests
- Manage Consolidations

The screen will display all the Account Administrators for the organization.

Account Administrators

The following is contact information for Account Administrators for your organization. You can contact an Account Administrator for assistance with updating your account profile or to add Rights to your account.

Showing (1 - 1) of 1

Group	Name	Email	Phone Number
*	JOHN DOE	jdoe@dealerxyz.com	(111) 222-3333

[Return to Main Menu](#)

View User Account History

Users can view a history of changes that were made to their account profile or to their account access rights. Locate the **User Name Dropdown** box in the upper right of the Gateway Main Menu. Click the **Edit Profile** link.

Welcome JDOE5 ▲, A9999.
[Logout](#)

MSRB Gateway Main Menu

Welcome to MSRB Gateway! Your User Account has the following access rights:

Market Transparency Systems

Access MSRB systems to submit documents and data related to municipal market activity and political contributions.

- Dealer System Outage Reporting
- SHORT System Web User Interface – Data Submissions
- SHORT System Web User Interface – Data Submissions Test Environment
- RTRS Web Interface - Test System
- Rule G-37 Submission
- EMMA Dataport

Dealer Feedback System

- Transaction Data Request Form

Account and Organization Management

- Manage User Accounts
- View Account Administrators
- Manage Groups
- Manage Continuing Disclosure Confirmation Requests
- Manage Consolidations

User ID: JDOE5
 Role: Master Account Administrator
 User Name: JOHN DOE
 Organization Name: Dealer XYZ
 MSRB ID: A9999
 Email Address: jdoe5@dealerxyz.com

[Edit Profile](#)
[Change Password](#)

Click **View Profile History** button to view the changes made to your profile. Click **View User Access Rights History** to view changes made to your access rights.

User Account Profile and Access Rights	
Account Details	
User ID:	JDOE5
User Name:	JOHN DOE
MSRB ID:	A9999
Email Address:	jdoe5@dealerxyz.com
Title:	
Department:	
Address:	123 MAIN STREET CITY, ST 12345 US
Phone Number:	123-456-7890
Fax Number:	
Last Updated by:	MSRB
On:	5/16/2016 5:01:02 PM
Account Access Rights	
You have the following Access Rights in MSRB Gateway:	
Access to user profile	<input checked="" type="checkbox"/> [?]
Agent Designation	<input checked="" type="checkbox"/> [?]
Dealer Feedback System	<input checked="" type="checkbox"/> [?]
Dealer System Outage Report User	<input checked="" type="checkbox"/> [?]
EMMA Continuing Disclosure Submissions	<input checked="" type="checkbox"/> [?]
EMMA Form G-45 Submissions	<input checked="" type="checkbox"/> [?]
EMMA Primary Market Submissions	<input checked="" type="checkbox"/> [?]
Electronic G-37	<input checked="" type="checkbox"/> [?]
Form A12	<input checked="" type="checkbox"/> [?]
Form A12 Review and Approve	<input checked="" type="checkbox"/> [?]
Form RTRS Regulator	<input checked="" type="checkbox"/> [?]
Form RTRS Review and Approve	<input checked="" type="checkbox"/> [?]
Form RTRS Submitter	<input checked="" type="checkbox"/> [?]
Master Account Administrator	<input checked="" type="checkbox"/> [?]
Other Form A-12 Submitter	<input checked="" type="checkbox"/> [?]
Primary Billing Contact	<input checked="" type="checkbox"/> [?]
Primary Regulatory Contact	<input checked="" type="checkbox"/> [?]
RTRS Web	<input type="checkbox"/> [?]
RTRS Web View Only	<input checked="" type="checkbox"/> [?]
RTRS-WEB TEST	<input checked="" type="checkbox"/> [?]
SHORT System	<input checked="" type="checkbox"/> [?]
View Profile History View Rights History Edit User Account	
Return to Accounts Manage Groups Manage Groups by User Return to Main Menu	

The profile history shows all updates to the account, as well as who made the updates.

User Account Profile History													
Click on an entry for available detail.													
Showing (1 - 5) of 5													
<div style="text-align: center;"> << < > >> </div> <table border="1"> <thead> <tr> <th>Updated By</th> <th>Updated On</th> </tr> </thead> <tbody> <tr> <td>CHOOK1</td> <td>10/21/2010 5:07:02 PM</td> </tr> <tr> <td>CHOOK1</td> <td>10/21/2010 5:02:57 PM</td> </tr> <tr> <td>CHOOK1</td> <td>10/21/2010 4:49:37 PM</td> </tr> <tr> <td>CHOOK1</td> <td>10/21/2010 4:41:54 PM</td> </tr> <tr> <td>CHOOK1</td> <td>10/21/2010 4:28:06 PM</td> </tr> </tbody> </table> <div style="text-align: center;"> << < > >> </div>		Updated By	Updated On	CHOOK1	10/21/2010 5:07:02 PM	CHOOK1	10/21/2010 5:02:57 PM	CHOOK1	10/21/2010 4:49:37 PM	CHOOK1	10/21/2010 4:41:54 PM	CHOOK1	10/21/2010 4:28:06 PM
Updated By	Updated On												
CHOOK1	10/21/2010 5:07:02 PM												
CHOOK1	10/21/2010 5:02:57 PM												
CHOOK1	10/21/2010 4:49:37 PM												
CHOOK1	10/21/2010 4:41:54 PM												
CHOOK1	10/21/2010 4:28:06 PM												
Return to Account Profile Return to Account Management													

The account access rights history shows a history of the user's account access rights, when account access rights were granted or removed, as well as who changed the access rights.

User Account Access Rights History			
Showing 0 of 0			
<input type="button" value="<<"/> <input type="button" value="<"/> <input type="button" value=">"/> <input type="button" value=">>"/>			
Application	Access	Updated By	Updated On
Electronic G-37	ACCESS GRANTED	JDOE14	6/2/2012 8:57:44 PM
EMMA Continuing Disclosure Submissions	ACCESS GRANTED	JDOE14	6/2/2012 8:57:44 PM
SHORT System	ACCESS GRANTED	JDOE14	6/2/2012 8:57:44 PM
EMMA Primary Market Submissions	ACCESS GRANTED	JDOE14	6/2/2012 8:57:44 PM
<input type="button" value="<<"/> <input type="button" value="<"/> <input type="button" value=">"/> <input type="button" value=">>"/>			

Password Management

There are several scenarios in which a user will need to reset their Gateway password. These scenarios include:

- a security requirement that forces users to periodically change their password;
- three unsuccessful log-in attempts resulting in the account being locked;
- users forget their password; and
- users wish to create a new password. (Passwords may be changed by clicking the **Change Password** link located in the user's **My Profile** box.)

Create Password for New User Account

After a Gateway account is created, the user receives an email with their User ID and a link to create a unique password. Click the link to create a unique password.

Please keep this information confidential to prevent unauthorized use of this account.

An MSRB Gateway Account has been created for this email address: kdoe@dealerxyz.com by JAMES DOE (JDOE14)

The following Access Right(s) have been granted:
SHORT System, EMMA Primary Market Submissions

Your New User ID is: KDOE14

You may retrieve your password by going to: <https://www.msrb.org/msrb1/control/forgotpassword.asp>

This is a system-generated e-mail PLEASE DO NOT REPLY. REPLIES ARE NOT MONITORED. If you need assistance with your account please contact an account manager at your organization. You may also obtain more information about MSRB Gateway at: <https://www.msrb.org/msrb1/control/default.asp>.

Enter your User ID and then click the **Submit** button.

Reset Password

To reset your password, enter your User ID below.
If you do not know your User ID or you need an MSRB Gateway account, contact a representative in the Market Information Department at (703)797-6668.

User ID:

An email is sent with a link to create a password. Click the link.

We have received your request for a new password. Please note that our records have been updated and we recommend that you change your password in our system within 7 days using the link below. The link will expire within 7 days and failure to reset your password within 7 days will require you to submit another request for a password change.

<http://www2.msrb.org/msrb1/control/forgotPasswordProcess.asp?key=xTMrPcUk6X6CFkV2xTGHV1K89wFc6x>

To change your password, follow the simple steps below:

1. Click on the password link above.
2. On the Password Change page, enter and confirm the password that satisfies the password criteria.
3. Click on the Continue button.

This is a system-generated e-mail. PLEASE DO NOT REPLY. REPLIES ARE NOT MONITORED. If you need assistance with your account please contact a representative in the Market Information Department at 703-797-6668. You may also obtain more information about MSRB Gateway at: <https://www.msrb.org/msrb1/control/default.asp>.

Enter the User ID again and then click the **Submit** button.

Retrieve Password

To validate your request for a new password, enter your User ID below.
If you do not know your User ID or you need an MSRB Gateway account, contact a representative in the Market Information Department at (703)797-6668.

User ID:

On the Change Password screen, create a new password in accordance with the password criteria and then click the **Continue** button.

Change Password

THE MSRB REQUIRES THAT USERS CHANGE THEIR PASSWORDS PERIODICALLY FOR SECURITY PURPOSES.

USERS ARE ALSO ASKED TO CHANGE THEIR PASSWORD UPON INITIAL LOGIN OR AFTER USING THE 'Forgot your password?' FEATURE.

YOU MUST CHANGE YOUR PASSWORD NOW TO CONTINUE TO ACCESS THIS SYSTEM.

To change your password you must:

1. Enter your new password
2. Enter your new password again to confirm
3. Click "Continue"

New passwords must meet the following criteria:

1. Must be between eight (8) and fifteen (15) characters long
2. Must be different from your current password
3. Must not contain your User ID
4. Must contain characters from at least three of the following four categories:
 - Uppercase characters (A-Z)
 - Lowercase characters (a-z)
 - Numeric characters (0-9)
 - Special characters (!@#\$%^&*(), etc. excluding spaces)

New Password:

Retype New Password:

A confirmation screen will appear. Click the **Return** button to be routed to the Gateway Main Menu.


Transaction Confirmation

You have successfully changed your password.

Forgot User Password

From the Gateway login page, click the **Forgot password?** link.

Log into MSRB Gateway



User ID

User id is required.

Password

[Forgot password?](#)

Login


[Don't have an account? Register](#)

MSRB Gateway Manual

Welcome to MSRB Gateway, the secure access point for all MSRB applications including EMMA. Click [here](#) for guidance on user account management and information about the MSRB Gateway.

To return to MSRB.org from within the MSRB Gateway application, click on the MSRB Home link at the top right corner of the page.

If you are experiencing login or other system related problems, please check the [Systems Status Page](#) for more information. If you need additional help, please contact the MSRB via email at GatewaySupport@msrb.org or by phone at 202-838-1330

 [Access Online Training about Submitting to EMMA](#)

The MSRB recommends not bookmarking this page.

Enter your User ID and then click the **Submit** button. If you do not know your User ID, contact an Account Administrator in your organization.

Reset Password

To reset your password, enter your User ID below.
 If you do not know your User ID or you need an MSRB Gateway account, contact a representative in the Market Information Department at (703)797-6668.

User ID:

A notice appears stating an email containing the link to reset your password has been emailed to you. Check your email to retrieve this link.

MSRB Account Password

A link to reset your password has been emailed to the address registered with the MSRB for this account. If you are having problems receiving this link, please contact a representative in the Market Information Department at (703) 797-6668.

From your email, click on the link to reset your password.

Subject: Your MSRB Gateway Password Request

We have received your request for a new password. Please note that our records have been updated and we recommend that you change your password in our system within 7 days using the link below. The link will expire within 7 days and failure to reset your password within 7 days will require you to submit another request for a password change.

<http://www.msrb.org/msrb1/control/forgotPasswordProcess.asp?key=g6nNAC8hauNBhEQ76vH6XmRgnquaZH>

To change your password, follow these simple steps below:

1. Click on the password link above.
2. On the Password Change page, enter and confirm the password that satisfies the password criteria.
3. Click on the Continue button.

This is a system-generated e-mail. PLEASE DO NOT REPLY. REPLIES ARE NOT MONITORED. If you need assistance please contact a representative in the Market Information Department on 703-797-6668. You may also obtain more information about MSRB Gateway at: <https://www.msrb.org/msrb1/control/default.asp>.

Enter your User ID and then click the **Submit** button.

Retrieve Password

To validate your request for a new password, enter your User ID below.
If you do not know your User ID or you need an MSRB Gateway account, contact a representative in the Market Information Department at (703)797-6668.

User ID:

Create your new password following the password criteria instructions listed. Click the **Continue** button.

Change Password

THE MSRB REQUIRES THAT USERS CHANGE THEIR PASSWORDS PERIODICALLY FOR SECURITY PURPOSES.

USERS ARE ALSO ASKED TO CHANGE THEIR PASSWORD UPON INITIAL LOGIN OR AFTER USING THE 'Forgot your password?' FEATURE.

YOU MUST CHANGE YOUR PASSWORD NOW TO CONTINUE TO ACCESS THIS SYSTEM.

To change your password you must:

1. Enter your new password
2. Enter your new password again to confirm
3. Click "Continue"

New passwords must meet the following criteria:

1. Must be between eight (8) and fifteen (15) characters long
2. Must be different from your current password
3. Must not contain your User ID
4. Must contain characters from at least three of the following four categories:
 - Uppercase characters (A-Z)
 - Lowercase characters (a-z)
 - Numeric characters (0-9)
 - Special characters (!@#%&^*(), etc. excluding spaces)

New Password:

Retype New Password:

The **Transaction Confirmation** screen will appear indicating the password was successfully changed. Click the **Return** button to be routed to the Gateway Main Menu.

Transaction Confirmation

You have successfully changed your password.

User Initiated Password Reset

Follow the steps below to create a new password:

Navigate to the **My Profile** box located on the Gateway Main Menu and click the **Change Password** link.

Welcome JDOE5 ▲, A9999. [Logout](#)

MSRB Gateway Main Menu
Welcome to MSRB Gateway! Your User Account has the following access rights:

Market Transparency Systems
Access MSRB systems to submit documents and data related to municipal market activity and political contributions.

- Dealer System Outage Reporting
- SHORT System Web User Interface – Data Submissions
- SHORT System Web User Interface – Data Submissions Test Environment
- RTRS Web Interface - Test System
- Rule G-37 Submission
- EMMA Dataport

Dealer Feedback System

- Transaction Data Request Form

User ID: JDOE5
Role: Master Account Administrator
User Name: JOHN DOE
Organization Name: Dealer XYZ
MSRB ID: A9999
Email Address: jdoe5@dealerxyz.com

[Edit Profile](#) Change Password

You will be required to enter your current password in order to create your new password.

Change Password

To change your password you must:

1. Enter your current password to confirm your identity
2. Enter your new password
3. Enter your new password again to confirm
4. Click "Continue"

New passwords must meet the following criteria:

1. Must be between eight (8) and fifteen (15) characters long
2. Must be different from your current password
3. Must not contain your User ID
4. Must contain characters from at least three of the following four categories:
 - Uppercase characters (A-Z)
 - Lowercase characters (a-z)
 - Numeric characters (0-9)
 - Special characters (!@#\$\$%^&*(), etc. excluding spaces)

Current Password:

New Password:

Retype New Password:

A **Transaction Confirmation** screen will confirm that the password was successfully changed. Click the **Return** button to navigate to the Gateway Main Menu.

Transaction Confirmation

You have successfully changed your password.

Part 4: Agent Designation Overview

An organization can designate another organization to act as their agent to make submissions to the EMMA website. Designations are made based on the submission rights of the designating organization. Agent designation allows an organization to control the type of submission(s) they chose to grant to an agent. The agent also has control over the submission types it accepts. Only Master Account Administrators can manage an organization's agent relationships, which are controlled in Gateway.

An organization can only designate rights that are inherent to its organization type. Submission rights cannot be delegated if the delegating organization cannot make those submissions itself. For example, a dealer can designate an agent to make primary market submissions on the EMMA website on its behalf.

Agent designation can be reciprocal. An organization can request another organization to make EMMA submissions as its agent; and that same organization can also offer to make submissions as an agent for another organization.

Parties involved in agent designations receive email communication to notify them of designations being made for agent relationships, as well as changes to authorized submission types.



Only the EMMA Primary Market Disclosure Service, Short-term Obligation Rate Transparency (SHORT) System, EMMA Continuing Disclosure Service and the EMMA Form G-45 529 College Savings Plan Submission Service allow agent designations which are managed through MSRB Gateway agent designation. Agents for purposes of reporting trade data are identified on MSRB Form A-12.

Agent Relationships Overview

This section shows how to access the agent management screen and provides an overview of the agent management functions that can be performed.

Access the agent management screen from the Gateway Main Menu and click on the **Manage Agent Relationships** link under the **Agent Relationship Management** section.

The screenshot displays the MSRB Gateway Main Menu with the following sections and links:

- MSRB Gateway Main Menu**
Welcome to MSRB Gateway! Your User Account has the following access rights:
- Market Transparency Systems**
Access MSRB systems to submit documents and data related to municipal market activity and political contributions.
 - Dealer System Outage Reporting
 - SHORT System Web User Interface – Data Submissions
 - SHORT System Web User Interface – Data Submissions Test Environment
 - RTRS Web Interface - Test System
 - Rule G-37 Submission
 - EMMA Dataport
- Dealer Feedback System**
 - Transaction Data Request Form
- Account and Organization Management**
 - Manage User Accounts
 - View Account Administrators
 - Manage Groups
 - Manage Continuing Disclosure Confirmation Requests
 - Manage Consolidations
- Registrant Information Forms**
Submit forms to provide information about your organization.
 - Form A-12
- Agent Relationship Management**
Invite and approve agent invitations to/from organizations.
 - Manage Agent Relationships

A red arrow points to the 'Manage Agent Relationships' link in the Agent Relationship Management section.

The resulting **Manage Agents Relationships** screen is divided into two sections. The first section shows your relationships with organizations that act as your agent, including:

- Active relationships—active relationships with agents you have approved to submit on your behalf.
- Organizations you have requested to be your agent—view pending designations to organizations that you are waiting to accept/decline your designation request.
- Organizations offering to serve as your agent—view pending designations from organizations that are waiting for you to accept or decline their offer to act as your agent.
- Designate an organization to act as your agent—send a request for an

organization to act as your agent.

Logged in as TJOE1 for P000244 [Logout](#)

Manage Agent Relationships

Use the following menu options to designate agents to make submissions on your behalf and approve requests from others to act as your agent.

[Active relationships: \(1\)](#) ←

[Organizations you have requested to act as your agent: \(0\)](#)

[Organizations offering to act as your agent: \(0\)](#)

[Designate an organization to act as your agent](#)

Use the following menu options to offer to make submissions on behalf of another organization and approve requests from others to make submissions on their behalf.

[Active Relationships: \(0\)](#)

[Organizations requesting that you act as their agent: \(0\)](#)

[Organizations for which you have offered to act as an agent: \(0\)](#)

[Offer to serve as an agent for another organization](#)

[Return to Main Menu](#)

Contact information for your Master Account Administrator will be shared with Master Account Administrators of organizations involved in agent relationships with you.

The second section of the **Manage Agent Relationships** screen shows agent relationships in which your organization assumes the role of an agent, including:

- Active relationships—shows organizations for which you currently act as an agent and shows the types of submissions you can make on that organization’s behalf.
- Organizations requesting that you act as their agent—view pending requests from organizations that you act as their agent. You can accept or decline the designation.
- Organizations for which you have offered to act as an agent—view pending requests where you have offered to act as an agent, and you are waiting for the organization to accept or decline your offer.
- Offer to serve as an agent for another organization—extend an offer to act as an agent for another organization

Logged in as TJOE1 for P000244 [Logout](#)

Manage Agent Relationships

Use the following menu options to designate agents to make submissions on your behalf and approve requests from others to act as your agent.

[Active relationships: \(1\)](#)

[Organizations you have requested to act as your agent: \(0\)](#)

[Organizations offering to act as your agent: \(0\)](#)

[Designate an organization to act as your agent](#)

Use the following menu options to offer to make submissions on behalf of another organization and approve requests from others to make submissions on their behalf.

[Active Relationships: \(0\)](#) ←

[Organizations requesting that you act as their agent: \(0\)](#)

[Organizations for which you have offered to act as an agent: \(0\)](#)

[Offer to serve as an agent for another organization](#)

[Return to Main Menu](#)

Contact information for your Master Account Administrator will be shared with Master Account Administrators of organizations involved in agent relationships with you.



At this time, municipal advisors are only required to make Form G-37 submissions, which do not allow agent submission. Therefore, municipal advisors can only submit on behalf of other organizations (acting as an agent), and only the lower menu section is visible when a municipal advisor logs into MSRB Gateway.

View Relationships with an Agent Organization

On the **Manage Agent Relationships** screen, click the **Active Relationships** link on the top section to see agents that are designated to submit on your behalf. Click on any organization's name to view more about the relationship.

Active Relationships

Organizations who can act as your agent: (2)

MSRB ID	Organization Name	Submission Type	Relationship Status
G00243	AGENT 1234	SHORT System	Active
G00243	AGENT 1234	EMMA - Primary Market Disclosure	Active

[Return to Agent Menu](#)
[Return to Main Menu](#)

The **Relationship** screen below lists your relationship with the organization selected. The upper section lists submissions the organization can make on your behalf. The lower section list submissions that you make for this organization.

Relationship with AGENT 1234:

MSRB ID: G00243
Phone Number: 111-222-3333
Fax Number: 999-999-9999
Address: 500 MAIN STREET
 SUITE 600
 CITY, ST 12345

You have designated this organization to act as your agent for the following types of submissions:

Submission Type	Relationship Status
EMMA - Primary Market Disclosure	Active
SHORT System	Active

[Update Submission Types](#)

You act as an agent for this organization for the following types of submissions:

Submission Type	Relationship Status
-- No submission types authorized --	

[Update Submission Types](#)

[Search](#)
[Return to Agent Menu](#)
[Return to Main Menu](#)

Send Agent Designation Request

Below is an overview of the steps involved when sending an agent designation request.

- An organization requests another organization to act as their agent and indicates the type of submission(s) they want the agent to make on their behalf. Gateway will reflect the pending status.
- The Master Account Administrator of the prospective agent organization is notified via email of the designation request. They may accept or decline each submission type requested. The pending status is updated accordingly in Gateway.
- The Master Account Administrator of the requesting organization is notified via email of the actions taken by the prospective agent organization.
- The submission right is reflected as a tab in EMMA Dataport to allow the agent to submit on behalf of the designating organization.

To get started, click on the **Manage Agent Relationships** link under the **Agent Relationship Management** section.

MSRB Gateway Main Menu
Welcome to MSRB Gateway! Your User Account has the following access rights:

Market Transparency Systems
Access MSRB systems to submit documents and data related to municipal market activity and political contributions.

- Dealer System Outage Reporting
- SHORT System Web User Interface – Data Submissions
- SHORT System Web User Interface – Data Submissions Test Environment
- RTRS Web Interface - Test System
- Rule G-37 Submission
- EMMA Dataport

Dealer Feedback System

- Transaction Data Request Form


Account and Organization Management

- Manage User Accounts
- View Account Administrators
- Manage Groups
- Manage Continuing Disclosure Confirmation Requests
- Manage Consolidations

Registrant Information Forms
Submit forms to provide information about your organization.

- Form A-12

Agent Relationship Management
Invite and approve agent invitations to/from organizations.

- Manage Agent Relationships 

Click the **Designate an organization to act as your agent** link.

Logged in as JDOE23 for A7260 [Logout](#)

Manage Agent Relationships

Use the following menu options to designate agents to make submissions on your behalf and approve requests from others to act as your agent.

- Active relationships: (0)
- Organizations you have requested to act as your agent: (0)
- Organizations offering to act as your agent: (0)
- [Designate an organization to act as your agent](#)

Use the following menu options to offer to make submissions on behalf of another organization and approve requests from others to make submissions on their behalf.

- Active Relationships: (0)
- Organizations requesting that you act as their agent: (0)
- Organizations for which you have offered to act as an agent: (0)
- [Offer to serve as an agent for another organization](#)

[Return to Main Menu](#)

Enter search criteria (e.g., organization name or MSRB ID) and then click the **Search** button.

Organization Search

Organization Name:

MSRBID:

Email Address:

[Search](#) [Reset Search](#) [Return to Agent Menu](#)

MSRB ID	Organization Name

On the search results page, click the organization you wish to designate.

Organization Search - 1 Matching Records

Organization Name:

MSRBID:

Email Address:

[Search](#) [Reset Search](#) [Return to Agent Menu](#)

MSRB ID	Organization Name
G00243	AGENT 1234

Click the **Update Submission Types** button to see the types of submissions that can be designated to an agent.

Relationship with AGENT 1234:

MSRB ID: G00243
Phone Number: 111-222-3333
Fax Number: 999-999-9999
Address: 500 MAIN STREET
 SUITE 600
 CITY, ST 12345

You have designated this organization to act as your agent for the following types of submissions:

Submission Type	Relationship Status
-- No submission types authorized --	

[Update Submission Types](#)

You act as an agent for this organization for the following types of submissions:

Submission Type	Relationship Status
-- No submission types authorized --	

[Update Submission Types](#)

[Search](#) [Return to Agent Menu](#) [Return to Main Menu](#)

Select the submissions you would like the agent to make and then click the **Add Submission Type** button.

Relationship with AGENT 1234:

MSRB ID: G00243
Phone Number: 111-222-3333
Fax Number: 999-999-9999
Address: 500 MAIN STREET
 SUITE 600
 CITY, ST 12345

Types of submissions this organization can make on your behalf:

Submission Type	Relationship Status
-- No submission types authorized --	

Types of submissions for which you would like this organization to act as your agent:

EMMA - Primary Market Disclosure

SHORT System

[Add Submission Type](#)

[Search](#) [Return to Agent Menu](#) [Return to Main Menu](#)

The submissions selected move to the upper section of the screen as a pending item awaiting approval by the agent organization. The submission types on the lower section of the screen are available for designation. If a submission type is removed from the agent, it will move to the lower section of the screen.

Relationship with AGENT 1234:

MSRB ID: G00243
Phone Number: 111-222-3333
Fax Number: 999-999-9999
Address: 500 MAIN STREET
 SUITE 600
 CITY, ST 12345

Modifications successfully processed

Types of submissions this organization can make on your behalf:

Submission Type	Relationship Status
<input type="checkbox"/> EMMA - Primary Market Disclosure	Waiting for agent's approval

[Remove Relationship](#)

Types of submissions for which you would like this organization to act as your agent:

SHORT System

[Add Submission Type](#)

[Search](#)
[Return to Agent Menu](#)
[Return to Main Menu](#)

If the agent accepts the designation, the associated access right must be granted to the users in the organization who will make the submission.

Request to Act as an Agent

Just as you can request an organization to act as your agent, you can also request to serve as an agent for an organization by following the steps below.

On the agent relationship page, navigate to the lower section of the screen that lists functions available when you chose to act in the role of an agent. Click the **Offer to serve as an agent for another organization** link.


Logged in as TSAM1 for A7335 [Logout](#)

Manage Agent Relationships

Use the following menu options to designate agents to make submissions on your behalf and approve requests from others to act as your agent.

- [Active relationships: \(0\)](#)
- [Organizations you have requested to act as your agent: \(0\)](#)
- [Organizations offering to act as your agent: \(0\)](#)
- [Designate an organization to act as your agent](#)

Use the following menu options to offer to make submissions on behalf of another organization and approve requests from others to make submissions on their behalf.

- [Active Relationships: \(0\)](#)
- [Organizations requesting that you act as their agent: \(2\)](#)
- [Organizations for which you have offered to act as an agent: \(0\)](#)
- [Offer to serve as an agent for another organization](#) 
- [Return to Main Menu](#)

Enter search criteria and then click the **Search** button.

Organization Search

Organization Name:	<input style="width: 90%;" type="text"/>
MSRBID:	<input style="width: 90%;" type="text" value="A7243"/>
Email Address:	<input style="width: 90%;" type="text"/>

[Search](#)
[Reset Search](#)
[Return to Agent Menu](#)

MSRB ID	Organization Name

Click on the desired organization.

Organization Search - 1 Matching Records

Organization Name:	<input style="width: 90%;" type="text"/>
MSRBID:	<input style="width: 90%;" type="text" value="A7243"/>
Email Address:	<input style="width: 90%;" type="text"/>

[Search](#)
[Reset Search](#)
[Return to Agent Menu](#)

MSRB ID	Organization Name
A7243	Dealer XYZ

Click **Update Submission Types** for the types of submissions this organization can make.

Relationship with Dealer XYZ:

MSRB ID: A7243
Phone Number: 111-222-3333
Fax Number:
Address: 101 Main Street
 New York City, NY 12345

Types of submissions for which you are currently an agent for this organization:

Submission Type	Relationship Status
-- No current agent relationship with this organization --	

Types of submissions for which you would like to act as this organization's agent:

EMMA - Primary Market Disclosure
 SHORT System

[Add Submission Type](#)

[Search](#) [Return to Agent Menu](#) [Return to Main Menu](#)

Select the submission(s) you would like to make and then click the **Add Submission Type** button.

Relationship with Dealer XYZ:

MSRB ID: A7243
Phone Number: 111-222-3333
Fax Number:
Address: 101 Main Street
 New York City, NY 12345

Types of submissions for which you are currently an agent for this organization:

Submission Type	Relationship Status
-- No current agent relationship with this organization --	

Types of submissions for which you would like to act as this organization's agent:

EMMA - Primary Market Disclosure
 SHORT System

[Add Submission Type](#)

Your request is placed in pending status, pending approval or denial of the submission type from the other organization. You will receive an email notification stating the actions taken.

Relationship with Dealer XYZ:

MSRB ID: A7243
Phone Number: 111-222-3333
Fax Number:
Address: 101 Main Street
New York City, NY 12345

Modifications successfully processed

Types of submissions for which you are currently an agent for this organization:

Submission Type	Relationship Status
<input type="checkbox"/> EMMA - Primary Market Disclosure	Waiting for their approval
<input type="checkbox"/> SHORT System	Waiting for their approval

[Remove Relationship](#)

Types of submissions for which you would like to act as this organization's agent:

-- No additional submission types available --

[Search](#) [Return to Agent Menu](#) [Return to Main Menu](#)

If the submission type is approved, the associated access right must be granted to the users in the organization who will make the submission.

Accept or Decline an Agent Designation Request

To accept or decline an agent designation request, follow the steps below.

From the **Manage Organization Relationships** screen, click the **Organizations you have requested to act as your agent** link or **Organizations requesting that you act as their agent** link.

Manage Agent Relationships

Use the following menu options to designate agents to make submissions on your behalf and approve requests from others to act as your agent.

Active relationships: (2)
Organizations you have requested to act as your agent: (0) ←
Organizations offering to act as your agent: (0)
Designate an organization to act as your agent

Use the following menu options to offer to make submissions on behalf of another organization and approve requests from others to make submissions on their behalf.

Active Relationships: (0)
Organizations requesting that you act as their agent: (2) ←
Organizations for which you have offered to act as an agent: (0)
Offer to serve as an agent for another organization

[Return to Main Menu](#)

Pending requests are displayed. Click on the submission type to accept or decline the request.

Pending Agent Designations

Organizations you have requested to act as your agent: (1)

MSRB ID	Organization Name	Submission Type	Relationship Status
G00243	AGENT 1234	EMMA - Primary Market Disclosure	Pending

[Return to Agent Menu](#)
[Return to Main Menu](#)

To accept the designation, click on the box for each submission type you choose to accept and then click the **Approve Relationship** button.

Relationship with Dealer ABC:

MSRB ID: A7258
 Phone Number: 111-222-3333
 Fax Number: 999-999-9999
 Address: 2000 Main Street
 City, ST 12345

Types of submissions for which you are currently an agent for this organization:

Submission Type	Relationship Status
<input type="checkbox"/> EMMA - Primary Market Disclosure	Waiting for your approval

[Remove Relationship](#)
[Approve Relationship](#)

Types of submissions for which you would like to act as this organization's agent:

SHORT System

[Add Submission Type](#)

[Search](#)
[Return to Agent Menu](#)
[Return to Main Menu](#)

The approved submission type will show as Active.

Relationship with Dealer ABC:

MSRB ID: A7258
 Phone Number: 111-222-3333
 Fax Number: 999-999-9999
 Address: 2000 Main Street
 City, ST 12345

Modifications successfully processed

Types of submissions for which you are currently an agent for this organization:

Submission Type	Relationship Status
<input type="checkbox"/> EMMA - Primary Market Disclosure	Active

[Remove Relationship](#)

Types of submissions for which you would like to act as this organization's agent:

SHORT System

[Add Submission Type](#)

[Search](#)
[Return to Agent Menu](#)
[Return to Main Menu](#)

To decline the designation, click the box to uncheck each submission type that you do not choose to accept and then click the **Remove Relationship** button.

Relationship with Dealer ABC:

MSRB ID: A7258
Phone Number: 111-222-3333
Fax Number: 999-999-9999
Address: 2000 Main Street
City, ST 12345

Modifications successfully processed

Types of submissions for which you are currently an agent for this organization:

Submission Type	Relationship Status
<input type="checkbox"/> EMMA - Primary Market Disclosure	Active
<input checked="" type="checkbox"/> SHORT System	Waiting for their approval

[Remove Relationship](#)

Types of submissions for which you would like to act as this organization's agent:

-- No additional submission types available --

[Search](#) [Return to Agent Menu](#) [Return to Main Menu](#)

Click the **Confirm** button to remove the agent relationship(s).

Edit Agent Relationship with Dealer ABC:

MSRB ID: A7258
Phone Number: 111-222-3333
Fax Number: 999-999-9999
Address: 2000 Main Street
City, ST 12345

You have chosen to remove the following agent relationships with this organization:

Submission Type	Relationship Status
SHORT System	Waiting for principal's approval

[Confirm](#) [Cancel](#)

[Previous Page](#) [Search](#) [Return to Agent Menu](#) [Return to Main Menu](#)

The submission type appears in the lower section of the screen and is available for future designation.

Relationship with Dealer ABC:

MSRB ID: A7258
Phone Number: 111-222-3333
Fax Number: 999-999-9999
Address: 2000 Main Street
 City, ST 12345

Modifications successfully processed

Types of submissions for which you are currently an agent for this organization:

Submission Type	Relationship Status
<input type="checkbox"/> EMMA - Primary Market Disclosure	Active

[Remove Relationship](#)

Types of submissions for which you would like to act as this organization's agent:

SHORT System

[Add Submission Type](#)

[Search](#)
[Return to Agent Menu](#)
[Return to Main Menu](#)

Manage Agent Designation Rights

An agent relationship can be amended by both the agent and the designating organization at any time. Either party can request additional submission types or remove an existing submission type.

To amend designations, click the **Active Relationships** link.

Manage Agent Relationships

Use the following menu options to designate agents to make submissions on your behalf and approve requests from others to act as your agent.

Active relationships: (1) ←
Organizations you have requested to act as your agent: (0)
Organizations offering to act as your agent: (0)
Designate an organization to act as your agent

Use the following menu options to offer to make submissions on behalf of another organization and approve requests from others to make submissions on their behalf.

Active Relationships: (0) ←
Organizations requesting that you act as their agent: (0)
Organizations for which you have offered to act as an agent: (0)
Offer to serve as an agent for another organization

[Return to Main Menu](#)

All active agent relationships will appear. Click on the organization you wish to update.

Active Relationships

Organizations who can act as your agent: (1)

MSRB ID	Organization Name	Submission Type	Relationship Status
G00243	AGENT 1234	EMMA - Primary Market Disclosure	Active

[Return to Agent Menu](#)
[Return to Main Menu](#)

Submissions this organization makes on your behalf will display on the upper section of the screen. Submissions you make for this organization will display on the lower section of the screen. Click the **Update Submission Types** button to add or remove a submissions type.

Relationship with AGENT 1234:

MSRB ID: G00243
Phone Number: 111-222-3333
Fax Number: 999-999-9999
Address: 500 MAIN STREET
 SUITE 600
 CITY, ST 12345

You have designated this organization to act as your agent for the following types of submissions:

Submission Type	Relationship Status
EMMA - Primary Market Disclosure	Active

[Update Submission Types](#)

You act as an agent for this organization for the following types of submissions:

Submission Type	Relationship Status
-- No submission types authorized --	

[Update Submission Types](#)

[Search](#)
[Return to Agent Menu](#)
[Return to Main Menu](#)

The first part of the screen below lists active submission rights. Click the **Remove Relationship** button to remove this right.

The second section on this screen lists submission rights that have not been designated. Click the **Add submission type** button to request a submission type. An email is forwarded to the organization and they must accept or decline the designation request.

Relationship with AGENT 1234:

MSRB ID: G00243
Phone Number: 111-222-3333
Fax Number: 999-999-9999
Address: 500 MAIN STREET
 SUITE 600
 CITY, ST 12345

Types of submissions this organization can make on your behalf:

Submission Type	Relationship Status
<input type="checkbox"/> EMMA - Primary Market Disclosure	Active

[Remove Relationship](#)

Types of submissions for which you would like this organization to act as your agent:

SHORT System

[Add Submission Type](#)

[Search](#) [Return to Agent Menu](#) [Return to Main Menu](#)

Deactivation of Agent Relationship

An organization can remove a submission type in an agent relationship at any time. It is important to note that removing a submission right will disable a user's account if the submission type that is removed is the only Gateway account access right that has been granted to the user. The Master Account Administrators of the impacted organization will be alerted of its affected users.

If an agent no longer wishes to make a submission on behalf of another organization, and removes the submission type from the agent relationship, the user account is disabled as a result of this action once the action is confirmed.

Logged in as JDOE23 for A7260 [Logout](#)

Relationship with AGENT 1234:

MSRB ID: G00243
Phone Number: 111-222-3333
Fax Number: 999-999-9999
Address: 500 MAIN STREET
 SUITE 600
 CITY, ST 12345

Types of submissions this organization can make on your behalf:

Submission Type	Relationship Status
<input checked="" type="checkbox"/> EMMA - Primary Market Disclosure	Active
<input type="checkbox"/> SHORT System	Active

[Remove Relationship](#)

Types of submissions for which you would like this organization to act as your agent:

-- No additional submission types available --

[Add Submission Type](#)

[Search](#) [Return to Agent Menu](#) [Return to Main Menu](#)

If a submission type is removed and results in the disablement of a user's account in Gateway, the Master Account Administrator of the impacted organization receives the following email, which lists the user accounts that were deactivated as a result of the action. The text of the email changes slightly if an agent requests to remove a submission right.

Be advised that the Master Account Administrator for Organization XYZ has modified its relationship with your organization. Organization XYZ requests that your organization make the following submission(s) to EMMA on their behalf:

EMMA Voluntary OS/ARD Submission

The following users have had rights removed since those rights were dependent on this agent relationship:

USERID: JDOE

User Name: JOHN DOE

Email Address: jdoe@dealerxyz.com

Right Removed: EMMA Voluntary OS/ARD Submission

Please contact Jane Thomas Ms., Master Account Administrator for Organization XYZ, at 111-222-3333 if you have questions regarding this modification.

If you need assistance please contact MSRB's support line at 202-838-1330.

This is a system-generated email. PLEASE DO NOT REPLY. REPLIES ARE NOT MONITORED.

If a user's account is deactivated, the user cannot log in to Gateway. To reactivate a disabled account, the Master Account Administrator must grant the user at least one Gateway account access right.

Part 5: Groups

The Groups feature in Gateway gives the Master Account Administrator the option of forming smaller subgroups in Gateway. The MSRB highly recommends that only large organizations utilize the Group feature. This will facilitate easier account management for large organizations that must manage a large number of user accounts. The user accounts can be placed in groups and the groups can, at the discretion of the Master Account Administrator, be designated based on geographical location, department sector and job title, among others.

Group Roles and Responsibilities

User roles and responsibilities for Groups are described below.

Master Account Administrator

The Master Account Administrators can perform the following functions:

- Create, edit and delete a Group.
- Add users to a Group.
- Remove users from a Group.
- Add them self to a Group (Master Account Administrator privileges will not be affected).
- Appoint Group Account Administrators.
- Remove a user's Group Account Administrator role by:
 - Removing the user from the Group(s) that he/she manages. If removed from all groups, the user will become a Global Account Administrator
 - Remove the user's Account Administrator account access right. The user will remain in the group that he/she previously managed but will no longer have administrative rights.
- Appoint Global Account Administrators by granting the user Account Administrator account access rights, but not appointing the user to a group.
- Remove a user's Global Account Administrator role by removing the user's Account Administrator account access rights. The user will no longer have administrative rights and the user's account will be disabled if no other user account access rights are granted.

Global Account Administrator

Global Account Administrators can perform the following functions for all users except the Master Account Administrator:

- Add users to a group (with the exception of Global Account Administrators)
- Edit all Group accounts

- Move users from one Group to another Group (except for Global Account Administrators who do not belong to a Group)
- Move Group Account Administrators from one group to another

The Global Account Administrator cannot perform the following functions:

- Add, edit or delete a Group.
- Grant Account Administrator account access rights (therefore cannot create Global Account Administrators or Group Account Administrators).
- Remove Account Administrator account access rights (therefore cannot remove Global Account Administrator or Group Account Administrator roles).

Group Account Administrator

Group Account Administrators have administrative rights that are limited to users within that group.

A Group Account Administrator can perform the following functions:

- Manage user accounts within his/her Group(s).
- Create new users. The new user will be added to a Group that the Group Account Administrator manages.
- While a group can be administered by only one Group Account Administrator, a Group Account Administrator can administer multiple groups.

Create a New Group

To use the Groups feature, the Master Account Administrator must first create a Group using the following steps:

From the MSRB Gateway Main Menu, Click the **Manage Groups** link under the **Account and Company Management** section.

MSRB Gateway Main Menu
Welcome to MSRB Gateway! Your User Account has the following access rights:


Market Transparency Systems
Access MSRB systems to submit documents and data related to municipal market activity and political contributions.

- Dealer System Outage Reporting
- SHORT System Web User Interface – Data Submissions
- SHORT System Web User Interface – Data Submissions Test Environment
- RTRS Web Interface - Test System
- Rule G-37 Submission
- EMMA Dataport

Dealer Feedback System

- Transaction Data Request Form

Account and Organization Management

- Manage User Accounts
- View Account Administrators
- **Manage Groups** 
- Manage Continuing Disclosure Confirmation Requests
- Manage Consolidations

A list of Groups within the organization appears. Click the **Add New Group** button.

Groups | Users by Group

You can use Groups to organize your company's User Accounts. For example, if your organization has three different offices, you can create a Group for each and categorize existing or new User Accounts within the appropriate Group. After creating a Group, move User Accounts to a specific Group by accessing each User Account, clicking on the "Edit User Account" button and selecting the appropriate Group. You can also add or remove User Accounts from Groups by clicking on the "Users by Group" link above. Please be advised that all actions taken on MSRB systems by a user through a User Account established for your company shall be your company's responsibility.

Showing (1 - 2) of 2

Group Name	Action			Admin:
Group 1	Edit	Delete	View User Accounts	
Group 2	Edit	Delete	View User Accounts	

Enter the **Group Name** and then select a **Group Account Administrator** from the drop-down menu option, which provides a list of all Account Administrators within the organization.



A Group Account Administrator can be added at a later point if an Administrator has not been appointed yet, or if the desired Administrator is not an option in the drop-down menu.

Next, enter a brief description of the Group (optional) and then click the **Save** button to create the Group.

Groups

Complete the required information below to create a new Group. You can appoint a Group Account Administrator at this time or later by editing this Group or the Account Administrator's Account.

Group Name:*

Group Administrator (optional): [\[?\]](#)

Group Description (optional):

Save

[Return to Groups](#) [Return to Menu](#)

A confirmation screen will appear confirming the addition of a new Group.

Click on the **Accounts List** button to view a listing of all users in the organization.

Add User to a Group

This function can only be performed by an Account Administrator.

Navigate to the MSRB Gateway Main Menu and expand the **Account and Organization Management** link. Next, click on **Manage User Accounts** to get a listing of all users in the organization.

On the **User Accounts** page, select the user you would like to add to a Group.



If the user is not listed on the **User Accounts** page, add the new user by clicking the **Add New Account** button and then create an account for the user.

User Accounts

The following are User Accounts for your company. Depending on your MSRB Gateway Access Rights, you can add, edit, or disable User Accounts, and search for User Accounts by name, email, or by Group. To view details, select the desired User Account from the list. Please be advised that all actions taken on MSRB systems by a user through a User Account established for your company shall be your company's responsibility.

Search for a user:

By first name:

By last name:

By email:

By Right:

By Group: Manage Groups

Show disabled User Accounts:

Search Reset

Add New Account

Showing (1 - 5) of 5

User Name	Last Updated By	Last Updated On
<input checked="" type="checkbox"/> BETTY DOE	JDOE23	6/22/2012 1:48:48 PM
<input checked="" type="checkbox"/> CHRIS DOE	JDOE23	6/22/2012 2:33:36 PM
<input checked="" type="checkbox"/> JOHN DOE	JDOE23	6/22/2012 2:40:27 PM
<input checked="" type="checkbox"/> KELLY DOE	JDOE23	6/22/2012 3:03:39 PM
<input checked="" type="checkbox"/> Mike Doe	JDOE23	6/22/2012 10:51:36 AM

Return to Main Menu
Edit Groups

Add the user to a Group by clicking on the Group. A user can be placed in several groups by holding down the control key while selecting the Groups.

Click the **Continue** button to make additional updates.

Edit User Account

Account Details

User ID: CDOE
MSRB ID: A7260
Group(s): Group 1 Group 2 Group 3 [?]

For single selection, click once. For single de-selection, ctrl key + "click".
For multiple selection/de-selection, hold down ctrl key & make selections.
Groups that this User belongs to are highlighted in blue.

First Name:* CHRIS
Middle Name:
Last Name:* DOE
Email Address:*
Confirm Email:*
Title:
Department:
Phone Number:* - - **Ext.**
Fax Number: - -
Address1:*
Address2:
City:*
State:*
Zip:*
Country:

*required

Account Access Rights

Select the Access Rights to assign to this User Account.
This user will have the following Access Rights in MSRB Gateway:

Account Administrator [?]
Agent Designation [?]
Dealer System Outage Report User [?]
EMMA Continuing Disclosure Submissions [?]
EMMA Primary Market Submissions [?]
Electronic G-37 [?]
SHORT System [?]

Force password change on next login.
 Disable the user account.

The confirmation screen notes updates to the user's account. The user will receive an email detailing the changes to their account. Click the **Confirm User Account** button to confirm the updates.

Confirm User Account	
Account Details	Account Access Rights:
User ID: BDOE1	You have added this User Account to the following Group(s): Group 1.
User Name: BETTY DOE	User will be forced to change their password on next login.
MSRB ID: A7260	Click on "Confirm User Account" to complete the process.
Group(s): Group 1	
Email Address: bdoe@dealerxyz.com	
Title:	
Department:	
Address: 101 MAIN STREET CITY, ST 12345	
Phone Number: 111-222-3333 Ext. 444	
Fax Number:	
Confirm User Account	Edit User Account
Return to Accounts	Return to Main Menu

Delete User from a Group

Use the following steps to delete a user from a group:

Navigate to the users Account Details page and then click the **Edit User Account** button.

On the user's account detail screen, the group(s) that the user belongs to will be highlighted. To remove the user from a group, press the Ctrl key and click on the highlighted group to deselect the group.



If the user has **Account Administrator** account access rights and is removed from all groups, the user will become a Global Account Administrator.

Edit User Account

Account Details

User ID: CDOE
MSRB ID: A7260
Group(s): Group 1 Group 2 Group 3 [?]

For single selection, click once. For single de-selection, ctrl key + "click".
For multiple selection/de-selection, hold down ctrl key & make selections.
Groups that this User belongs to are highlighted in blue.

First Name:* CHRIS
Middle Name:
Last Name:* DOE
Email Address:*
Confirm Email:*
Title:
Department:
Phone Number:* - - **Ext.**
Fax Number: - -
Address1:*
Address2:
City:*
State:*
Zip:*
Country:

*required

Account Access Rights

Select the Access Rights to assign to this User Account.
This user will have the following Access Rights in MSRB Gateway:

- Account Administrator** [?]
- Agent Designation** [?]
- Dealer System Outage Report User** [?]
- EMMA Continuing Disclosure Submissions** [?]
- EMMA Primary Market Submissions** [?]
- Electronic G-37** [?]
- SHORT System** [?]

Force password change on next login.
 Disable the user account.

Continue
Return to Account Profile

Return to Accounts
Return to Main Menu

Create Global Account Administrator

Only the Master Account Administrator can create a Global Account Administrator. The Master Account Administrator must grant **Account Administrator** rights to an existing user or create a new user and grant them this right. The Global Account Administrator will not be assigned to any Group. Use the following steps to create a Global Account Administrator.

Grant the user **Account Administrator** rights then click **Continue**.

Edit User Account

Account Details

User ID: CDOE
MSRB ID: A7260
Group(s): Group 1 [?]
Group 2
Group 3
For single selection, click once. For single de-selection, ctrl key + "click".
For multiple selection/de-selection, hold down ctrl key & make selections.
Groups that this User belongs to are highlighted in blue.

First Name:* CHRIS
Middle Name:
Last Name:* DOE
Email Address:*
Confirm Email:*
Title:
Department:
Phone Number:* - - **Ext.**
Fax Number: - -
Address1:*
Address2:
City:*
State:*
Zip:*
Country:

*required

Account Access Rights

Select the Access Rights to assign to this User Account.
This user will have the following Access Rights in MSRB Gateway:

Account Administrator [?]
Agent Designation [?]
Dealer System Outage Report User [?]
EMMA Continuing Disclosure Submissions [?]
EMMA Primary Market Submissions [?]
Electronic G-37 [?]
SHORT System [?]

Force password change on next login.
 Disable the user account.

Continue
Return to Account Profile

Return to Accounts
Return to Main Menu

Remove Global Account Administrator

Only the Master Account Administrator can remove the Global Account Administrator role from a user. Once this role is removed, the individual is a User in Gateway who is not assigned to any Group. It is important that the user is granted at least one account access right, otherwise the account will be disabled. Follow the steps below to remove the Global Account Administrator role from a user.

The Master Account Administrator must edit the Global Account Administrator's user profile and remove the **Account Administrator** account access right by deselecting it and then click the **Continue** button.

Please ensure that the user is granted at least one account access right. Otherwise, the account will be disabled.

Edit User Account

Account Details

User ID: CDOE
MSRB ID: A7260
Group(s): Group 1
Group 2
Group 3 [?]

For single selection, click once. For single de-selection, ctrl key + "click".
For multiple selection/de-selection, hold down ctrl key & make selections.
Groups that this User belongs to are highlighted in blue.

First Name:* CHRIS
Middle Name:
Last Name:* DOE
Email Address:*
Confirm Email:*
Title:
Department:
Phone Number:* - - **Ext.**
Fax Number: - -
Address1:*
Address2:
City:*
State:*
Zip:*
Country:

*required

Account Access Rights

Select the Access Rights to assign to this User Account.
This user will have the following Access Rights in MSRB Gateway:

- Account Administrator** [?]
- Agent Designation** [?]
- Dealer System Outage Report User** [?]
- EMMA Continuing Disclosure Submissions** [?]
- EMMA Primary Market Submissions** [?]
- Electronic G-37** [?]
- SHORT System** [?]

Force password change on next login.
 Disable the user account.

Create Group Account Administrator

To create a Group Account Administrator the Master Account Administrator must grant Account Administrator account access rights to a new or existing user and assign the user to a Group(s).

A Group Account Administrator can be created by:

- Adding a Global Account Administrator to a Group;
- Creating a new user with Account Administrator access rights and then adding the user to a Group; or
- Granting an existing user Account Administrator access rights and then adding the user to a Group.

If transferring this right to a new or existing user, Account Administrator access rights must be granted to the user.

The Master Account Administrator can appoint a Group Account Administrator from the User Accounts screen or use the Manage Groups function. Steps for both methods are described below.

On the User Accounts Screen select an existing user with Account Administrator access rights and edit the user's account.

User Account Profile and Access Rights	
Account Details	Account Access Rights
<p>User ID: CDOE</p> <p>User Name: CHRIS DOE</p> <p>MSRB ID: A7260</p> <p>Email Address: cdoe@dealerxyz.com Email User ID</p> <p>Title:</p> <p>Department:</p> <p>Address: 101 MAIN STREET CITY, ST 12345</p> <p>Phone Number: 111-222-3333</p> <p>Fax Number:</p> <p>Last Updated by: JDOE23 On: 6/22/2012 5:29:56 PM</p>	<p>This user has the following Access Rights in MSRB Gateway:</p> <p>Account Administrator <input checked="" type="checkbox"/> [?]</p> <p>Agent Designation <input type="checkbox"/> [?]</p> <p>Dealer System Outage Report User <input type="checkbox"/> [?]</p> <p>EMMA Continuing Disclosure Submissions <input type="checkbox"/> [?]</p> <p>EMMA Primary Market Submissions <input checked="" type="checkbox"/> [?]</p> <p>Electronic G-37 <input type="checkbox"/> [?]</p> <p>SHORT System <input checked="" type="checkbox"/> [?]</p>
View Profile History	View Rights History Edit User Account
Return to Accounts	Manage Groups Manage Groups by User Return to Main Menu

Under Account Details, a listing of all available groups will be displayed. Select the group(s) you wish to assign to the new Group Account Administrator by clicking on the group(s). To select multiple groups, hold down the Ctrl key and then select the Groups. (If the group you select has an existing Group Account Administrator, the new group Account Administrator will replace the existing Group Account Administrator.)

Click **Continue**.

Edit User Account

Account Details

User ID: CDOE
MSRB ID: A7260
Group(s): Group 1 Group 2 Group 3 [?]

For single selection, click once. For single de-selection, ctrl key + "click". For multiple selection/de-selection, hold down ctrl key & make selections. Groups that this User belongs to are highlighted in blue.

First Name:* CHRIS
Middle Name:
Last Name:* DOE
Email Address:*
Confirm Email:*
Title:
Department:
Phone Number:* - - **Ext.**
Fax Number: - -
Address1:*
Address2:
City:*
State:*
Zip:*
Country:

*required

Account Access Rights

Select the Access Rights to assign to this User Account.
This user will have the following Access Rights in MSRB Gateway:

Account Administrator [?]
Agent Designation [?]
Dealer System Outage Report User [?]
EMMA Continuing Disclosure Submissions [?]
EMMA Primary Market Submissions [?]
Electronic G-37 [?]
SHORT System [?]

Force password change on next login.
 Disable the user account.

After selecting the group(s), a message will appear confirming the user is the Group Account Administrator for the selected group(s).

If the user is replacing an existing Group Account Administrator, a message will be displayed noting this change.

Click the **Confirm User Account** button.

Confirm User Account	
Account Details	Account Access Rights:
User ID: CDOE	This user will be a Group Administrator for the following Group(s): Group 3, and will be unable to administer User Accounts outside of this Group(s). If you wish for this user to administer all of your company's User Accounts, click on "Edit User Account", deselect the Group(s) and click on "Continue" at the bottom of the page.
User Name: CHRIS DOE	
MSRB ID: A7260	Click on "Confirm User Account" to complete the process.
Group(s): Group 3	
Email Address: cdoe@dealerxyz.com	
Title:	
Department:	
Address: 101 MAIN STREET CITY, ST 12345	
Phone Number: 111-222-3333	
Fax Number:	
<div style="display: flex; justify-content: space-around;"> Confirm User Account Edit User Account </div> <hr/> <div style="display: flex; justify-content: space-around;"> Return to Accounts Return to Main Menu </div>	

A confirmation screen will appear.

User Account Update Results
The following User Account was successfully updated. An email confirmation was sent to the user.
User ID: CDOE
MSRB ID: A7260
Name: CHRIS DOE
Email Address: cdoe@dealerxyz.com
<div style="display: flex; justify-content: space-around;"> Return to Accounts Return to Main Menu </div>

The user will receive a confirmation email stating they are now a Group Account Administrator for the selected Group(s).

If the new Group Account Administrator replaces an existing Group Account Administrator, the Group Account Administrator being replaced receives an email that states they are no longer the administrator of the Group(s).

Please keep this information confidential to prevent unauthorized use of this account.

The MSRB account registered for this email address: CDOE14 has been updated by James Doe (JDOE14)

You are now appointed as Account Administrator of the following Group(s):
Group 3

You may login and check your account details and update history by going to: <http://www.msrb.org/msrb1/control/default.asp>

This is a system-generated e-mail PLEASE DO NOT REPLY. REPLIES ARE NOT MONITORED. If you need assistance with your account, please contact an account manager at your organization. You may also obtain more information about MSRB Gateway at: <https://www.msrb.org/msrb1/control/default.asp>.

Remove Group Account Administrator from a Group

Only the Master Account Administrator can remove the Group Account Administrator from a group. Once this role is removed, the individual is a Gateway user who is not assigned to any Group. It is important that the user is granted at least one account access right—otherwise, the account will be disabled.

- If the Group Account Administrator is removed from all Groups, but still has Account Administrator rights, the individual will become a Global Account Administrator.
- If the Group Account Administrator is removed from all Groups and Account Administrator rights are removed, the individual will become a Gateway User who does not belong to any Group.
- It is important that the user is granted at least one account access right—otherwise, the user's account will be disabled.

To remove the user's Group Account Administrator role, navigate to the User Account screen and update the desired user's account. The Group(s) managed by the user will be highlighted in blue.

Edit User Account

Account Details

User ID: CDOE
MSRB ID: A7260
Group(s): Group 1
Group 2
Group 3 (Admin: CDOE) [?]

For single selection, click once. For single de-selection, ctrl key + "click".
For multiple selection/de-selection, hold down ctrl key & make selections.
Groups that this User belongs to are highlighted in blue.

First Name:* CHRIS
Middle Name:
Last Name:* DOE
Email Address:*
Confirm Email:*
Title:
Department:
Phone Number:* - - **Ext.**
Fax Number: - -
Address1:*
Address2:
City:*
State:*
Zip:*
Country:

*required

Account Access Rights

Select the Access Rights to assign to this User Account.
This user will have the following Access Rights in MSRB Gateway:

Account Administrator [?]
Agent Designation [?]
Dealer System Outage Report User [?]
EMMA Continuing Disclosure Submissions [?]
EMMA Primary Market Submissions [?]
Electronic G-37 [?]
SHORT System [?]

Force password change on next login.
 Disable the user account.

To deselect a Group, press the Ctrl key and click on that Group. To deselect several groups, hold down the Ctrl key and then click on the Groups you would like to deselect.

Click the **Continue** button.

Edit User Account

Account Details

User ID: CDOE
MSRB ID: A7260
Group(s): Group 1
Group 2
Group 3 (Admin: CDOE) [?]

For single selection, click once. For single de-selection, ctrl key + "click".
For multiple selection/de-selection, hold down ctrl key & make selections.
Groups that this User belongs to are highlighted in blue.

First Name:* CHRIS
Middle Name:
Last Name:* DOE
Email Address:*
Confirm Email:*
Title:
Department:
Phone Number:* - - **Ext.**
Fax Number: - -
Address1:*
Address2:
City:*
State:*
Zip:*
Country:

*required

Account Access Rights

Select the Access Rights to assign to this User Account.
This user will have the following Access Rights in MSRB Gateway:

Account Administrator [?]
Agent Designation [?]
Dealer System Outage Report User [?]
EMMA Continuing Disclosure Submissions [?]
EMMA Primary Market Submissions [?]
Electronic G-37 [?]
SHORT System [?]

Force password change on next login.
 Disable the user account.

Continue
Return to Account Profile

Return to Accounts
Return to Main Menu

A confirmation screen will confirm updates made to the account.

User Account Update Results

The following User Account was successfully updated. An email confirmation was sent to the user.

User ID: CDOE
MSRB ID: A7260
Name: CHRIS DOE
Email Address: cdoe@dealerxyz.com

Return to Accounts
Return to Main Menu

Delete a Group

Only the Master Account Administrator can delete a Group(s). When the Master Account Administrator deletes a Group(s), the user accounts are not deleted, but instead are disassociated from that Group(s). Follow the steps below to delete a Group from Gateway.

From **Account and Company Management** on the MSRB Gateway Main Menu, select **Manage Groups**. Locate the Group(s) you would like to delete and then click the **Delete** button next to the Group name.

Groups | Users by Group

You can use Groups to organize your company's User Accounts. For example, if your organization has three different offices, you can create a Group for each and categorize existing or new User Accounts within the appropriate Group. After creating a Group, move User Accounts to a specific Group by accessing each User Account, clicking on the "Edit User Account" button and selecting the appropriate Group. You can also add or remove User Accounts from Groups by clicking on the "Users by Group" link above. Please be advised that all actions taken on MSRB systems by a user through a User Account established for your company shall be your company's responsibility.

Showing (1 - 3) of 3

Group Name	Action			Admin:
Group 1	Edit	Delete	View User Accounts	Admin:
Group 2	Edit	Delete	View User Accounts	Admin:
Group 3	Edit	Delete	View User Accounts	Admin:

Buttons: Add New Group, User Account List, Return to Main Menu

A dialogue box will appear that states the Group cannot be reinstated once it has been deleted and that users belonging to that Group will be disassociated. Click the **OK** button on the popup message screen to confirm the deletion.

Groups | Users by Group

You can use Groups to organize your company's User Accounts. For example, if your organization has three different offices, you can create a Group for each and categorize existing or new User Accounts within the appropriate Group. After creating a Group, move User Accounts to a specific Group by accessing each User Account, clicking on the "Edit User Account" button and selecting the appropriate Group. You can also add or remove User Accounts from Groups by clicking on the "Users by Group" link above. Please be advised that all actions taken on MSRB systems by a user through a User Account established for your company shall be your company's responsibility.

Showing (1 - 3) of 3

Group Name	Action			Admin:
Group 1	Edit	Delete	View User Accounts	Admin:
Group 2	Edit	Delete	View User Accounts	Admin:
Group 3	Edit	Delete	View User Accounts	Admin:

Buttons: Add New Group, User Account List, Return to Main Menu

Message from webpage

Delete the Group 1 group?
You will not be able to reinstate this Group. User Account(s) that belong to this Group will be disassociated.

OK Cancel

A confirmation screen will appear.

Groups - Confirmation

You have deleted the Group "Group 1". This Group cannot be reinstated. User Accounts that belonged to this Group have been disassociated.

[Return to Groups](#) [Return to Account Management](#)