

Steps to Configure Your Account in the New Environment For E-Invoicing and other UMass-hosted applications

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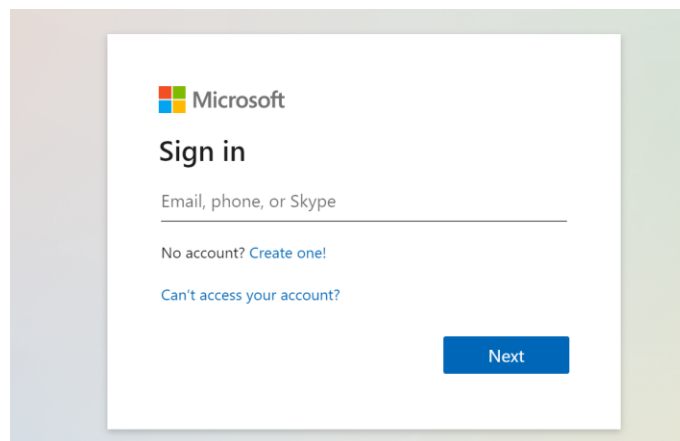
Step-By-Step Instructions to Configure Your Account and Launch E-Invoicing

NOTE FOR USERS WHO ACCESS OTHER MICROSOFT ENVIRONMENTS

*The new environment for **E-Invoicing** and other UMass-hosted applications is a Microsoft-hosted environment. Some users – but not all – may also be using Microsoft-hosted environments to run other applications, which may include Microsoft Office 365 applications like email.*

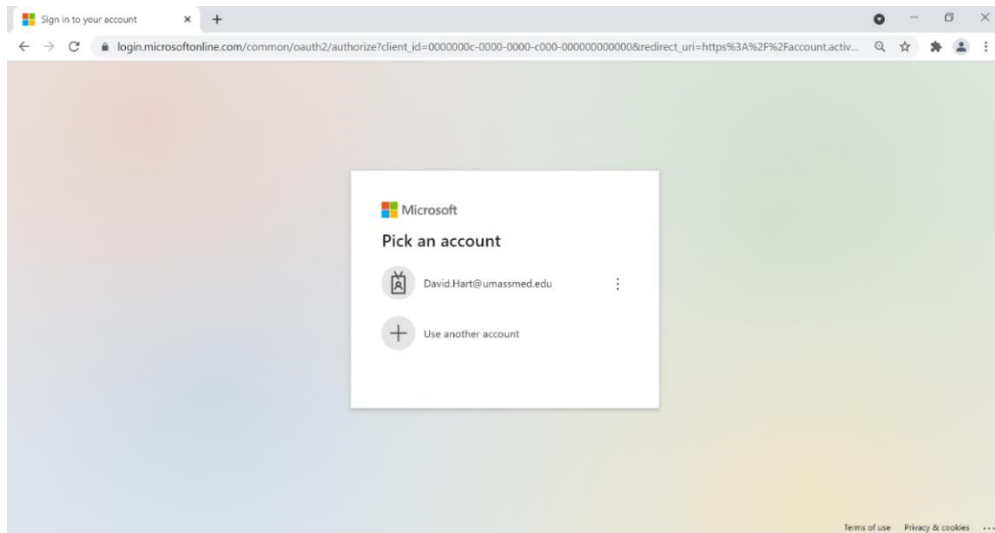
*If this is the case for you, we recommend that you attempt to access each of your Microsoft environments via a separate web browser (for example, make connections to E-Invoicing from a Chrome browser, and make connections to Microsoft email from an Edge browser). **We recommend Chrome and Firefox as browsers for accessing UMass applications.** Another approach would be to completely log out from one Microsoft environment before launching a connection to the new environment for UMass-hosted applications. Step 3 below contains additional information on Microsoft connections.*

1. Access <https://myapps.microsoft.com> from your web browser (Chrome or Firefox recommended).
2. Next, a Microsoft log in page with title “Sign In” is displayed. Enter your User ID as it appears in the “User ID” field of the email you received with Subject line **Your new EOE Online Account for E-Invoicing**.

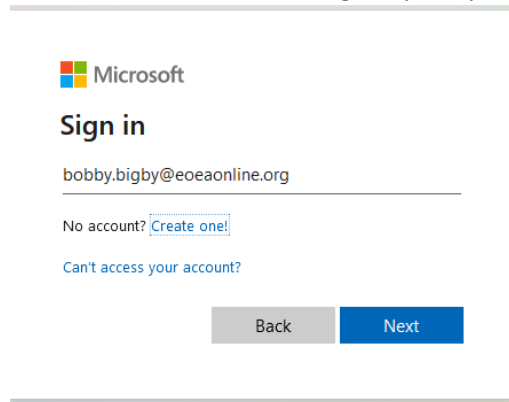


3. If you have previously accessed other Microsoft environments from the same browser on the same computer, you may automatically be logged into an account from a different Microsoft environment, or, you may see “Pick an account” with account names associated with your previous activity (see screen image below). If you are logged into a different Microsoft environment, please launch another browser application (Chrome and Firefox are recommended) to initiate your connection to E-Invoicing via <https://myapps.microsoft.com>.

If you don't see an account in the “Pick an account” list that looks like your *firstname.lastname* followed by *@eoeaonline.org*, (e.g., robert.young@eoeaonline.org), click the plus sign (+) adjacent to “Use another account” (image below).

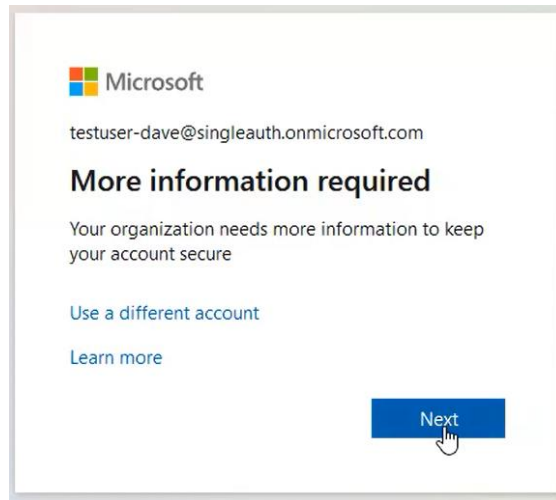


4. If you clicked the + next to “Use another account”, a Sign in prompt will be displayed as shown here:

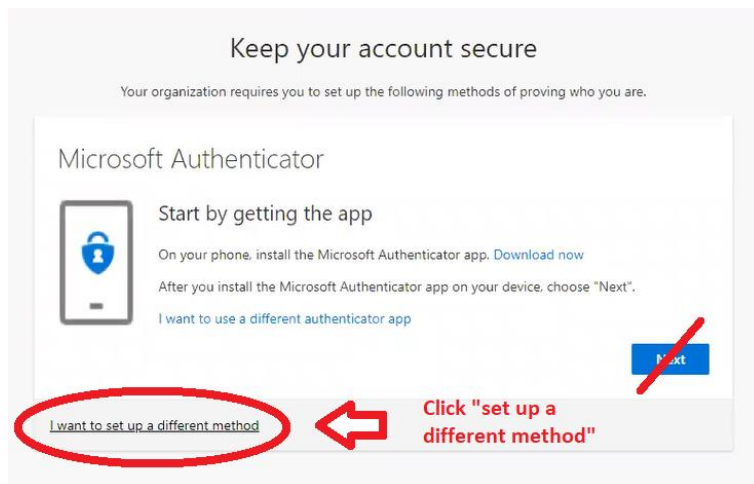


After specifying your username, click **Next** and you'll be prompted for your password.

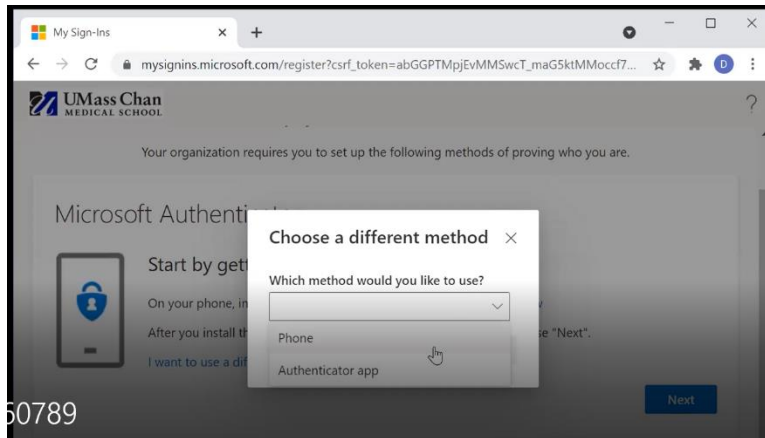
- Next, you will be guided through a sequence of screens in which you will configure your account and security settings. The first of these screens is shown on the next page. Click **Next** in this screen.



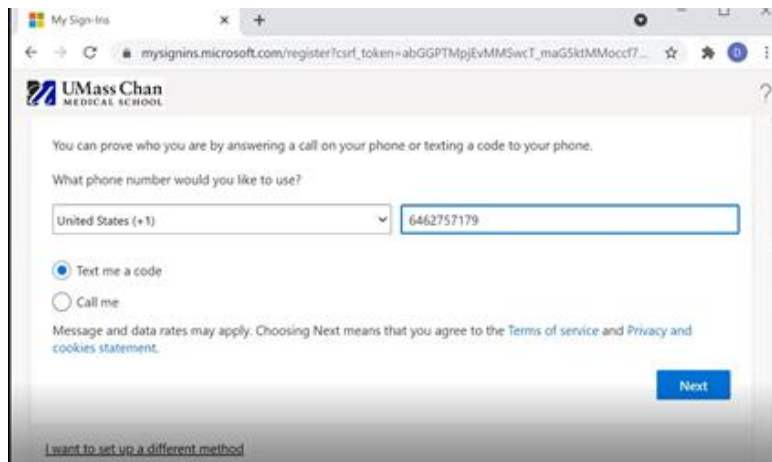
- Next, the system will guide you through steps to configure security functionality in the new environment. The first of these configuration screens is displayed below. **Select "I want to set up a different method" annotated in red below** (rather than the default option, Microsoft Authenticator).



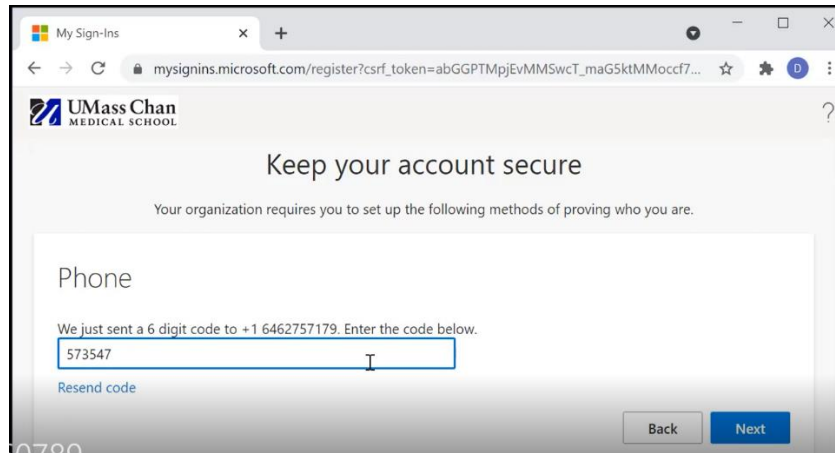
- After you click to use another method, a dropdown displays, showing the available methods (see screen image below). Select **Phone** from the dropdown, then click the Confirm button.



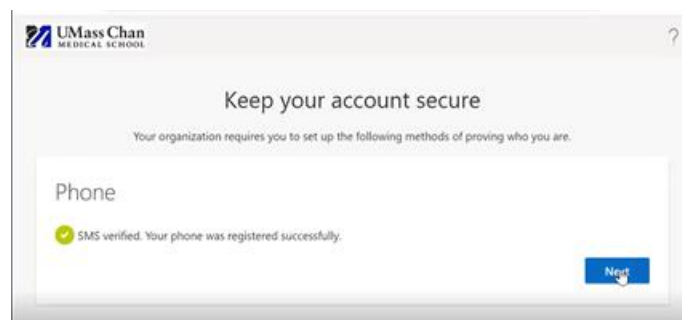
- Next, a screen displays for you to configure the phone number which would receive a call or text message when you have forgotten your password and need to reset it. You may configure either to receive a text message or a phone call as part of the reset process. The screen image on the next page shows the scenario where the user wants to receive a text message. After you provide your phone number and select Text or Call, press **Next**.



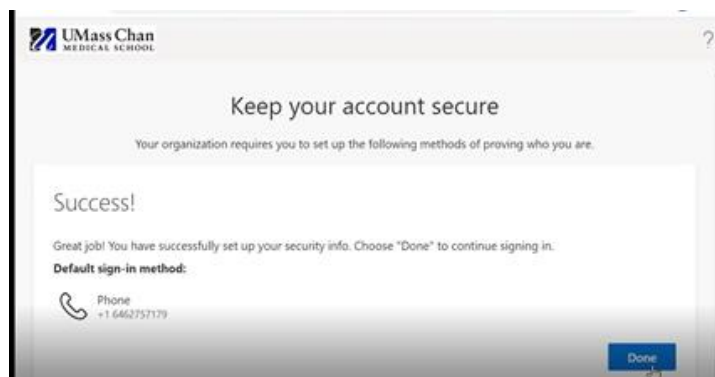
- After pressing "Next", you will receive either a phone call or text message, depending on your selection. In the case of a text, enter the six-digit code from the text message (see screen image below). In the case of a phone call, respond to the prompt in the call. Then, press **Next**.



Next, a status screen displays (image below), indicating you have successfully registered your Phone security method, which will be used to confirm your identity when you click “I forgot my password” in future sessions. Press **Next** on this screen.



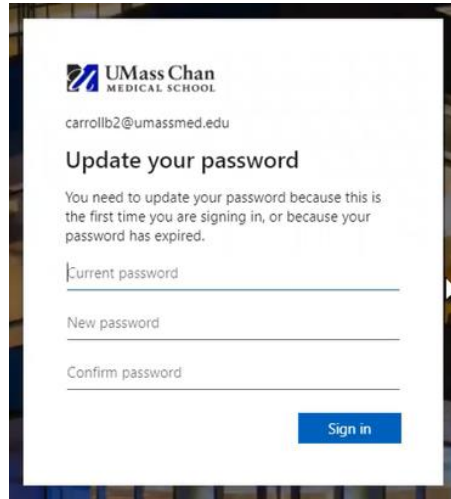
10. An additional screen displays, confirming the successful setup of your account’s security information. Click **Done** on this screen.



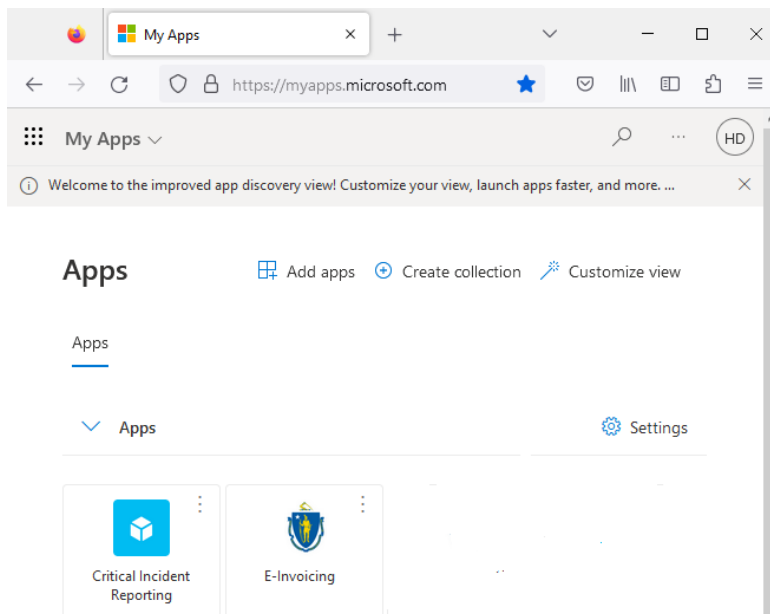
11. Next, you will be prompted to specify a permanent password (see screen image below). The requirements for a permanent password are:

- At least 8 characters

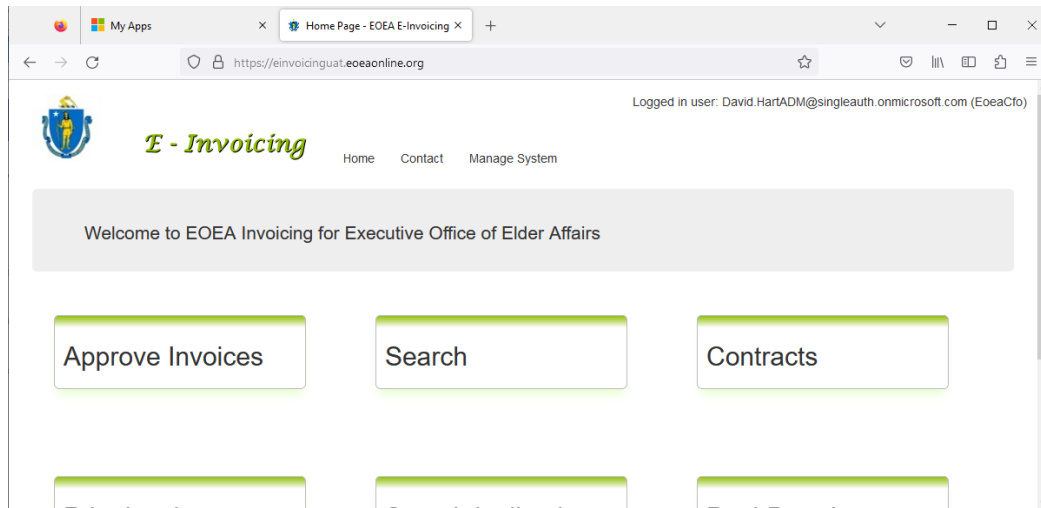
- Must contain 3 of the following: Uppercase character, lowercase character, number, special character (*#@\$%^&!)
- Permanent passwords are valid for 60 days, after which you'll be prompted to create a new password.



Next, your Myapps landing page (image below) displays an icon for each application to which you have access. You have access to **E-Invoicing** and possibly to Critical Incident Reporting. As we deploy more UMass-hosted applications to the new environment, other icons may also display. The screen image below reflects a user with access to E-Invoicing and Critical Incident Reporting.



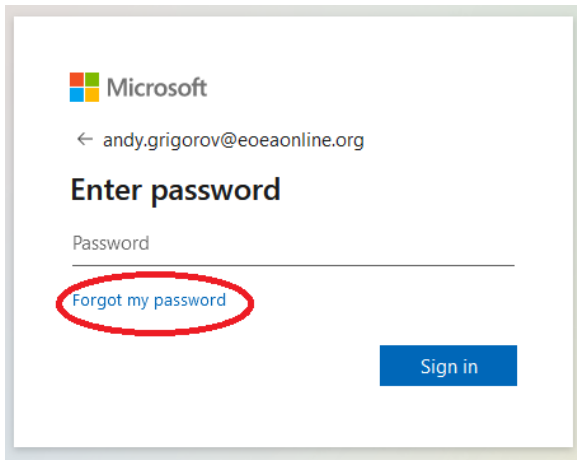
12. Click the **E-Invoicing** icon. The E-Invoicing landing page will display in another browser tab, as depicted below. You should be able to access the data and functions of the applications as in the previous environment.



APPENDIX – How to Reset Your Password (Self-service)

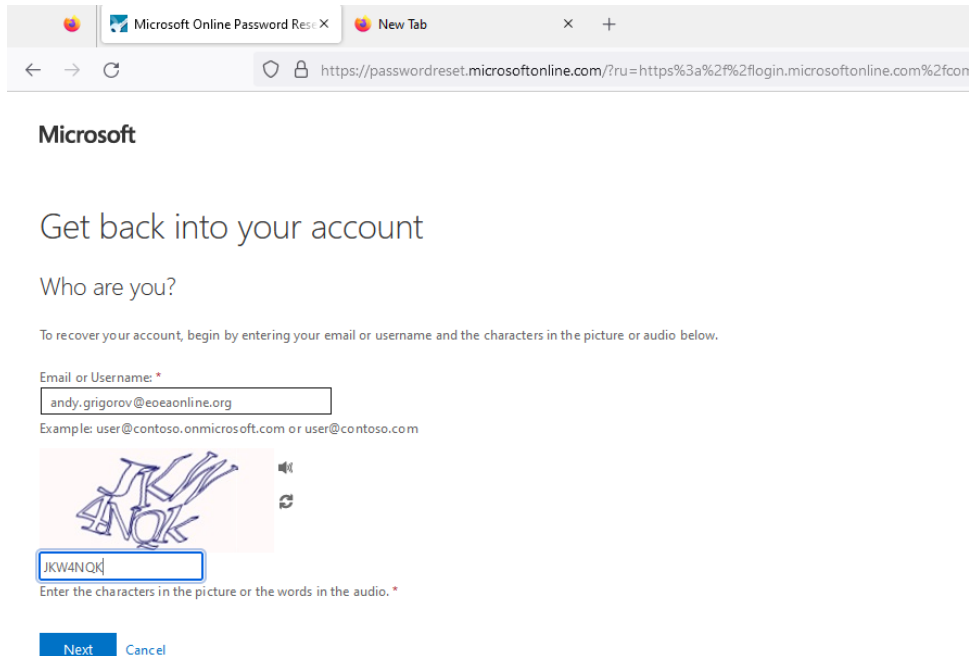
The new environment includes a convenient self-service password reset function. There are two ways to access this function:

- Click “Forgot my password” on the login page (<https://myapps.microsoft.com>), as shown below:



- Go directly to <https://passwordreset.microsoftonline.com>

Next, the “Get back into your account” prompt is displayed, as shown below. Provide responses to the prompts, and click Next.



Next, you'll be prompted to use one of the security access methods you specified during account setup, to verify your identity and reset your password (see image below).

The screenshot shows a web browser window with two tabs: "Microsoft Online Password Rese..." and "New Tab". The address bar shows the URL: "https://passwordreset.microsoftonline.com/?ru=https%3a%2f%2flogin.microsoftonline.com%2fcom...". The page content includes the Microsoft logo, the heading "Get back into your account", and a breadcrumb "verification step 1 > choose a new password". Below this, it says "Please choose the contact method we should use for verification:". There are two radio button options: "Text my mobile phone" (which is selected) and "Call my mobile phone". To the right of the "Text my mobile phone" option, there is explanatory text: "In order to protect your account, we need you to enter your complete mobile phone number (*****65) below. You will then receive a text message with a verification code which can be used to reset your password." Below this text is a text input field labeled "Enter your phone number" and a "Text" button.

After you've verified your identity, you'll be prompted specify your new password, as shown below:

The screenshot shows the same browser window as the previous image. The page content now includes the heading "Get back into your account" and a breadcrumb "verification step 1 ✓ > choose a new password". Below this, there are two password input fields. The first is labeled "* Enter new password:" and contains a password of 8 dots. Below the input field, a green bar indicates the password strength as "strong". The second field is labeled "* Confirm new password:" and is currently empty. To the right of the input fields, a callout box contains the text: "A strong password is required. Strong passwords are 8 to 256 characters and must combine uppercase and lowercase letters, numbers, and symbols. They cannot contain your username." At the bottom of the form, there are two buttons: "Finish" and "Cancel".