



# AgencyWeb Job Aid

## Home Screen and Log On

### Overview

Most Home Screen options do not require a User ID and Password (with the exception of the log on process)

The Home Screen allows you to:

1. Request new or modify existing AgencyWeb access
  - a. This includes removing or terminating access
2. Log on once you have a User ID and Password
3. Change your password
4. Access Help information
  - a. This includes FAQs, reference materials, and prerecorded MP3 video files
5. File a Service Request
6. Contact the Treasurer’s Office

*NOTE: If you enter your password incorrectly six times, the AgencyWeb will lock you out for three minutes. To create a new password, see the [Change Password](#) instructions.*

Security Access required: None

System Used: AgencyWeb

Special Access notes: None

### Tasks in this Job Aid

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## Home Screen and Log On

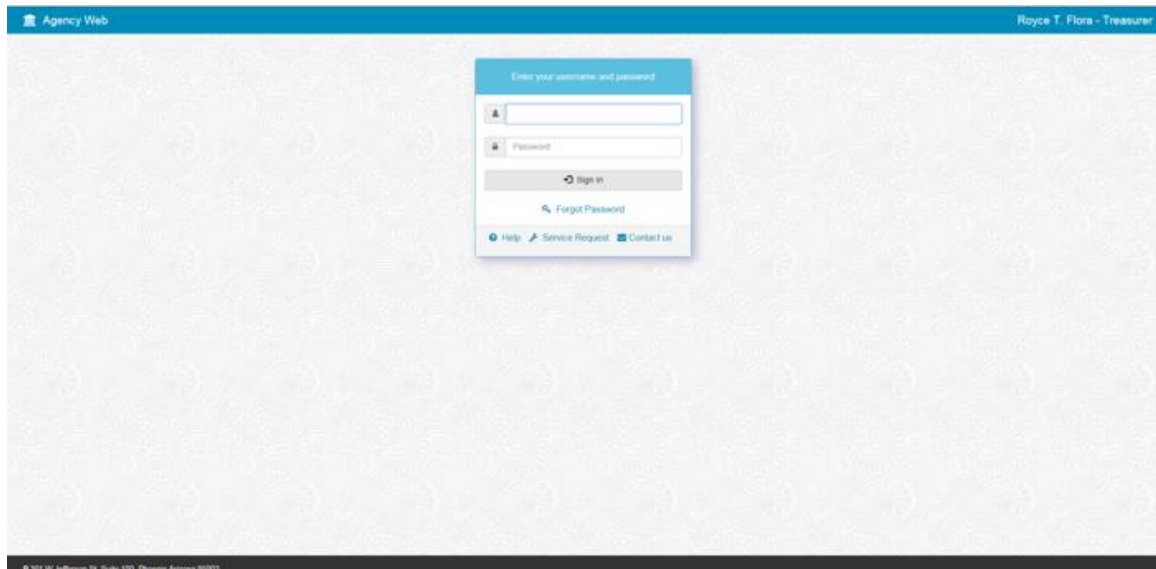
### Request NEW Access and MODIFY / REMOVE Existing Access

Use this option to:

1. Request brand-new access to the AgencyWeb
2. Modify existing access (including updates to emails addresses and telephone numbers)
3. Remove access when someone no longer requires it or when they leave the Agency

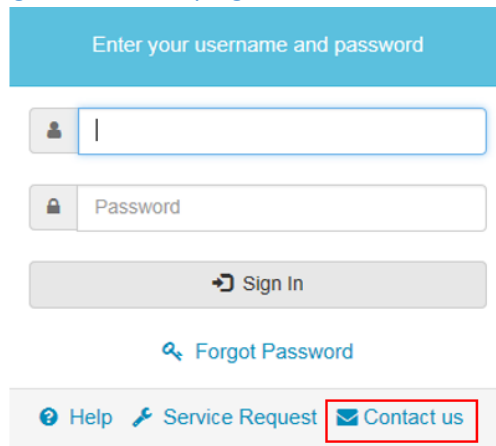
*For Agencies / Districts with an Agency Administrator, please have that person process all user access requests.*

#### 1 Access the AgencyWeb Home Page



#### 2 Click the "Contact Us" link

- This will open a new email address to the Treasurer's Office
- If an email does not open automatically, create a new email in your email system addressed to: [Treasurer.Accounting@mail.maricopa.gov](mailto:Treasurer.Accounting@mail.maricopa.gov)





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Request NEW Access and MODIFY / REMOVE Existing Access	
3	In your email, enter the Subject Line: <b>AgencyWeb Access</b>
4	<u>Include</u> the following information in your email: <ul style="list-style-type: none"><li>• Request the current AgencyWeb User Access Form</li><li>• Include your contact information (name, Agency, email, and telephone number)</li></ul>
5	Send the email
6	You will receive an email with the current version of the User Access Request Form attached
7	Complete the User Access Form and return it <ul style="list-style-type: none"><li>• The request will be reviewed by the Financial Services Division Director</li><li>• He will contact you if there are any questions</li></ul>
8	When access has been granted, the new user will receive an email with their User ID, the URL for the AgencyWeb, and instructions for logging on for the first time <ul style="list-style-type: none"><li>• See the Job Aid option below, <a href="#">FIRST TIME Log On</a></li></ul>
9	Training and reference materials are available at any time. While User Access requests are being processed, new users can review all training and reference materials <ul style="list-style-type: none"><li>• See the Job Aid option below, <a href="#">Help (includes Training / Reference Materials)</a></li></ul>



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### FIRST TIME Log On

Use this option when logging on to the AgencyWeb for the **first time only**.  
Once you have created a password, you will log on using your User ID and password.

**Prerequisite** You will receive an email with the URL of the AgencyWeb and your User ID.  
You will **not** receive a temporary password. Follow the FIRST TIME log on process below

1 Access the AgencyWeb Home Page

2 Click the **Forgot Password** link

3 Enter the email address associated with your User Access and click the **Email Link** button

- This is the email address noted on your AgencyWeb User Access Form
- **NOTE:** If your email address has changed, complete a User Access Form to update your email address on file with Treasury I.T. before proceeding with log on

4 You will see a message on your screen that states:

*Please check your email to reset your password. Ensure that your email service does not block the email address: AgencyWeb\_AccountHelp@mail.maricopa.gov.*



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## Home Screen and Log On

5	Access your email and open the message from: <i>AgencyWeb_AccountHelp@mail.maricopa.gov</i>
6	<p>If you are sharing the same email address with other Agency Web users in your organization, skip to <b>Step 6a</b>. Otherwise, click the reset password link in the email message</p> <ul style="list-style-type: none"><li>You have 30 minutes to click this link and reset your password. If you wait more than 30 minutes start this process with at Step 1 above</li></ul> <div data-bbox="332 583 1422 940" style="border: 1px solid black; padding: 10px;"><p><b>Reset Your Password</b></p><p>Dear Agency Web User,</p><p>You have requested to reset your password. If you did not make this request, please contact (602)506-8511. Otherwise, <a href="#">Click on this link to reset your Agency Web password.</a></p><p>Your username(s): <b>Train001 (for John Train001)</b>.</p><p><b>For security reasons, reset your password within 30 minutes.</b> If this time has elapsed, go to the "<a href="#">Forgot Your Password</a>" page again.</p><p>*** This is an automatically generated email. Please do not reply.***</p></div>
6a	<p><b>This step applies to users sharing the same email address with other Agency Web users in their organization.</b> Note the username that is assigned to you and click the reset password link in the email message.</p> <ul style="list-style-type: none"><li>You have 30 minutes to click this link and reset your password. If you wait more than 30 minutes start this process with at Step 1 above</li></ul> <div data-bbox="293 1234 1393 1560" style="border: 1px solid black; padding: 10px;"><p><b>Reset Your Password</b></p><p>Dear Agency Web User,</p><p>You have requested to reset your password. If you did not make this request, please contact (602)506-8511. Otherwise, <a href="#">Click on this link to reset your Agency Web password.</a></p><p>Your username(s): <b>testuser2 (for Erito Baggins), QATestUser3 (for Alison Wanda Landt), QATestUser7 (for Michelle PUHfeffer), Train001 (for John Train001)</b>.</p><p><b>For security reasons, reset your password within 30 minutes.</b> If this time has elapsed, go to the "<a href="#">Forgot Your Password</a>" page again.</p><p>*** This is an automatically generated email. Please do not reply.***</p></div>



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7	<p>If you are sharing the same email address with other Agency Web users in your organization, skip to <b>Step 7a</b>. Enter your email address and your new password twice (to confirm). Click the “Reset” button</p> <div data-bbox="483 472 1239 804"></div>
7a	<p><b>This step applies to users sharing the same email address with other Agency Web users in their organization.</b> Enter your email address, select the username that is assigned to you and enter your new password twice (to confirm). Click the “Reset” button</p> <div data-bbox="483 1050 1239 1587"></div>
8	<p>You will see a message on your screen that states: <i>Reset password confirmation. Your password has been reset. Please click here to log in.</i></p>
9	<p>Click the link in the message to return to the AgencyWeb Home Page</p>



# AgencyWeb Job Aid

## Home Screen and Log On

- 10 Enter your User ID in the **Username** field  
Enter your password in the **Password** field  
Click the **Sign In** button

A screenshot of the AgencyWeb login interface. At the top, a blue header bar contains the text "Enter your username and password". Below this are two input fields: the first is for the username, with a person icon on the left and a vertical bar indicating the cursor; the second is for the password, with a lock icon on the left and the word "Password" as a placeholder. Below the password field is a "Sign In" button with a right-pointing arrow icon, which is highlighted with a red rectangular border. Underneath the button is a "Forgot Password" link with a magnifying glass icon. At the bottom of the form are three links: "Help" with a question mark icon, "Service Request" with a wrench icon, and "Contact us" with an envelope icon.

Having trouble logging on? Click the **Service Request** link to request assistance



# AgencyWeb Job Aid

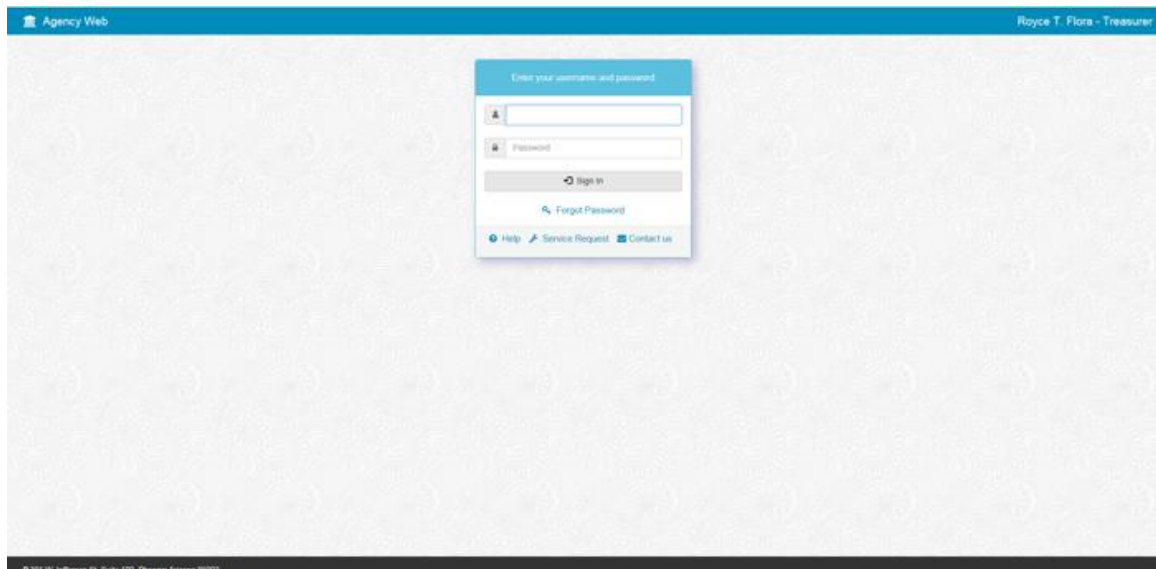
## Home Screen and Log On

### REGULAR Log On

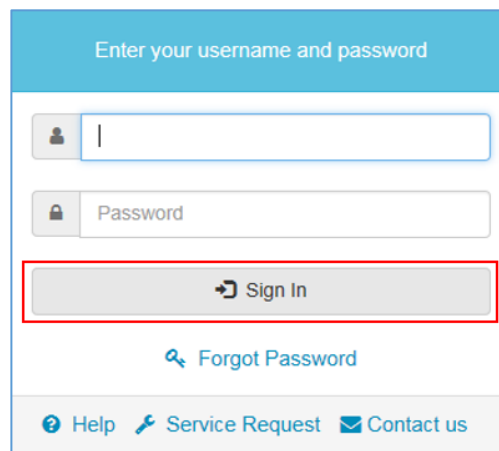
Use this option when logging on to the AgencyWeb.

- If you are logging on to the AgencyWeb for the **very first time**, see the Job Aid option above, [FIRST TIME Log On](#)

#### 1 Access the AgencyWeb Home Page



#### 2 Enter your User ID in the "Username" field Enter your password in the "Password" field Click the "Sign In" button



*NOTE: If you enter your password incorrectly six times, the AgencyWeb will lock you out for three minutes. To create a new password, see the [Change Password](#) instructions.*

Having trouble logging on?

See the Job Aid option [Service Request](#) to request assistance



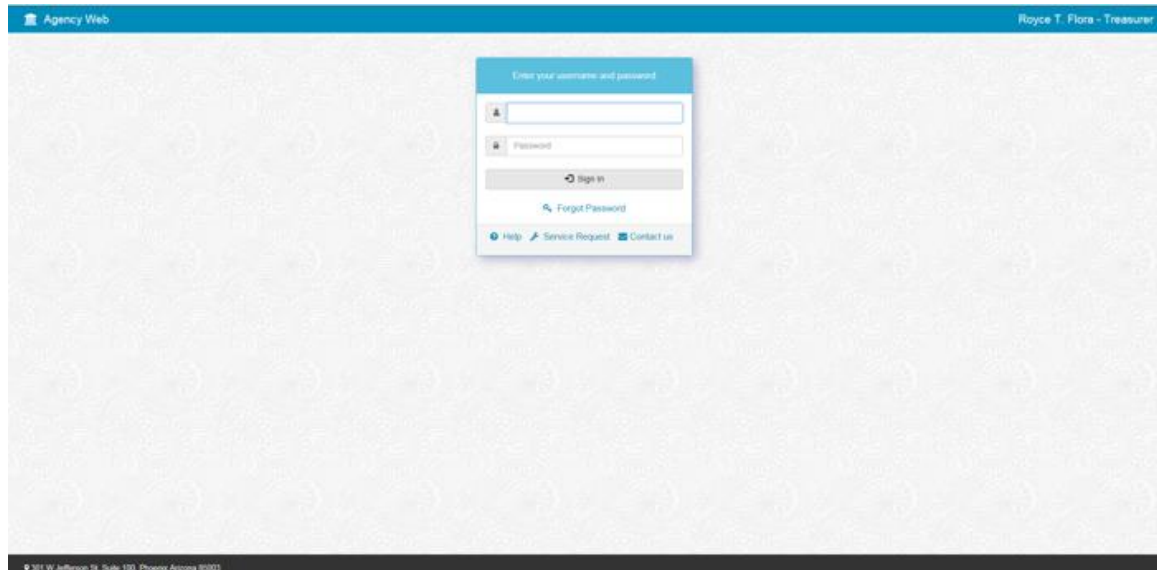


# AgencyWeb Job Aid

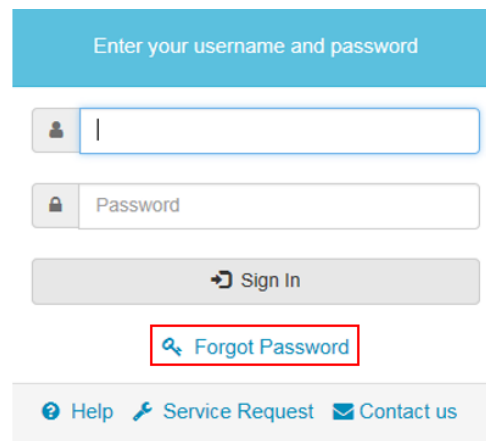
## Home Screen and Log On

### Change Password

- 1 Access the AgencyWeb Home Page



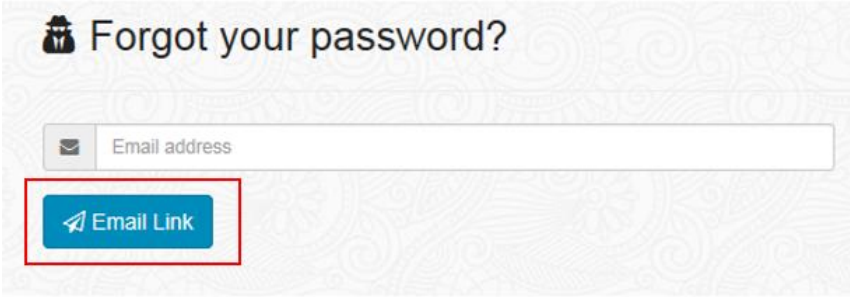
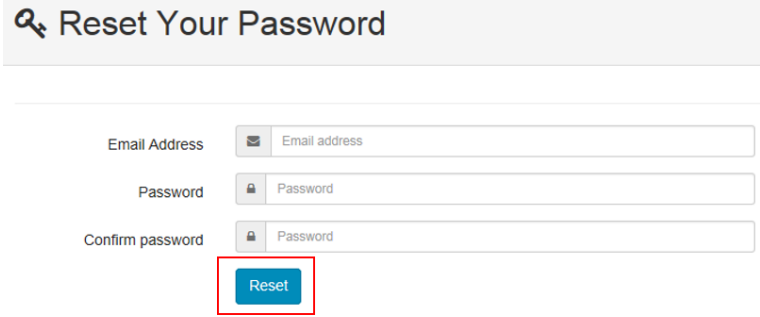
- 2 Click the "Forgot Password" link





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## Home Screen and Log On

Change Password	
3	<p>Enter the email address associated with your User Access and click the “<b>Email Link</b>” button</p> <ul style="list-style-type: none"><li>This is the email address noted on your AgencyWeb User Access Form</li><li>NOTE: If your email address has changed, see Job Aid option <a href="#">Request NEW Access and MODIFY / REMOVE Existing Access</a> to update your email address on file with Treasury I.T. before proceeding with log on</li></ul> 
4	<p>You will see a message on your screen that states: <i>Please check your email to reset your password. Ensure that your email service does not block the email address: AgencyWeb_AccountHelp@mail.maricopa.gov.</i></p>
5	<p>Access your email and open the message from <a href="mailto:AgencyWeb_AccountHelp@mail.maricopa.gov">AgencyWeb_AccountHelp@mail.maricopa.gov</a></p>
6	<p>Click the reset password link in the email message.</p> <ul style="list-style-type: none"><li>You have 30 minutes to click this link and reset your password. If you wait more than 30 minutes start this process with at Step 1 above</li></ul> <div data-bbox="321 1146 1382 1339" style="border: 1px solid black; padding: 5px;"><p><b>Reset Your Password</b></p><p>Dear Agency Web Beta User,</p><p>You have requested to reset your password. If you did not make this request, please contact (602)506-1102. Otherwise, <a href="#">Click on this link to reset your password.</a></p><p><b>For security reasons, reset your password within 30 minutes.</b> If this time has elapsed, go to the "Forgot Your Password" page again.</p><p>*** This is an automatically generated email. Please do not reply.***</p></div>
7	<p>Enter your email address and your new password twice (to confirm). Click the “<b>Reset</b>” button</p> 
8	<p>You will see a message on your screen that states: <i>Reset password confirmation. Your password has been reset. Please click here to log in.</i></p>
9	<p>Click the link in the message to return to the AgencyWeb Home Page</p>



# AgencyWeb Job Aid

## Home Screen and Log On

### Change Password

- 10 Enter your User ID in the “**Username**” field  
Enter your password in the “**Password**” field  
Click the “**Sign In**” button

Having trouble changing your Password?  
See the Job Aid option below, [Service Request](#) to request assistance



# AgencyWeb Job Aid

## *Home Screen and Log On*

### Help (includes Training / Reference Materials)

Use this option when searching for overview and training / reference materials.

The Help section is organized in four major groupings:

1. Categories of questions and FAQs
2. Questions and answers by category selected
3. Reference materials such as job aids and cross-references
4. Pre-recorded MP4 video files

Categories of questions and FAQs:

- Access
- Log On
- AgencyWeb & Microsoft Dynamics Access
- Log On, Passwords, Help
- Training
- Chart of Accounts
- Inquiry
- Reports
- File Upload
- Warrant Maintenance
- I Still Don't Know What To Do

**Note:** For questions about FTP, select the "Contact Us" link (see the Job Aid option [Contact Us](#))



# AgencyWeb Job Aid

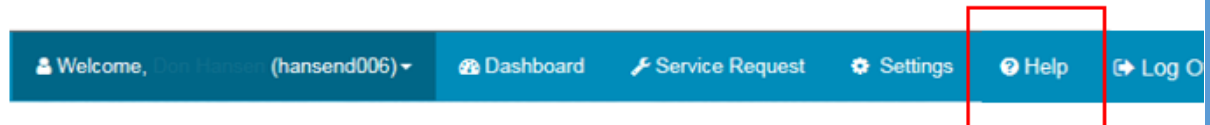
## Home Screen and Log On

### Help (includes Training / Reference Materials)

- 1 There are two ways to access the Help page:

From the Home Page, click the “Help” link (***you do not have to log in to access Help***)

- 2 Or, after logging in, click the “Help” link across the top of the AgencyWeb page





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## Home Screen and Log On

### Help (includes Training / Reference Materials)

#### 3 Review the available Help information

The screenshot shows the AgencyWeb Help page. On the left, a 'Help' sidebar (1) lists categories like ACCESS, TRAINING, and CHART OF ACCOUNTS. The main content area (2) is titled 'FAQ's & How To's' and shows 'ACCESS' and 'REQUEST ACCESS' sections. On the right, there are 'Documents' (3) and 'Videos' (4) sections.

The Help pages is organized into four sections:

1. Categories of questions and FAQs
2. Questions and answers by category selected
3. Reference materials such as job aids and cross-references
4. Pre-recorded MP4 video files

If the available Help information does not address your questions, please select the “Contact Us” link (see the Job Aid option [Contact Us](#))



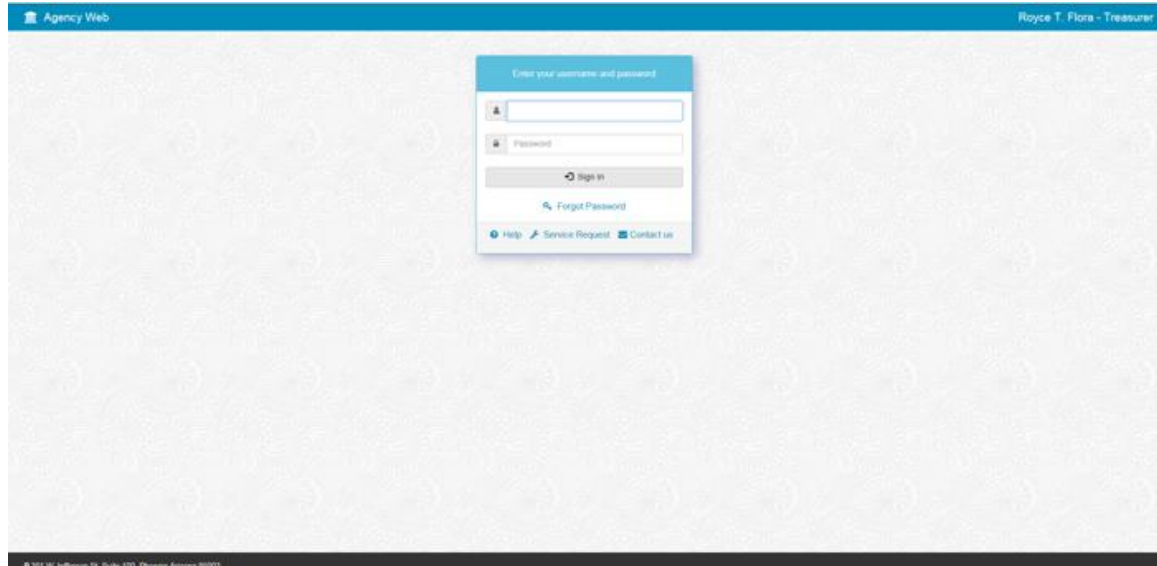
# AgencyWeb Job Aid

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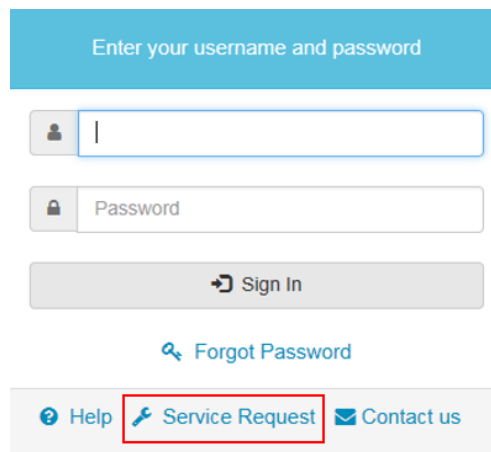
### Service Request

Use this option if you are having trouble accessing the AgencyWeb once you have a valid User ID and Password.

- 1 Access the AgencyWeb Home Page




- 2 Click the "Service Request" link





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Service Request	
3	<p>Complete the fields on the form.</p> <p>Required fields include: First Name, Last Name, Contact Name (this may be different if your Agency has an Administrator), Contact Email Address, and Contact Phone Number</p> <div data-bbox="415 487 1284 718"><p><b>Service Request</b></p><p>Name</p><p>First Name *      Last Name *</p><p>Contact Information</p><p>Contact Name *      Email Address *</p><p>Phone Number      Extension      Fax Number</p></div>
4	<p>Select a reason for the Service Request from the drop-down list</p> <div data-bbox="630 821 1027 989"><p>Reason</p><p>Select Reason *</p><p>Issues Logging in</p><p>Other</p></div>
5	<p>Add a message with details about your request</p> <ul style="list-style-type: none"><li>This is very important if you chose "Other" from the Service Request list above</li></ul> <div data-bbox="318 1121 1386 1362"><p>Message</p><p>Message</p></div>
6	<p>Check the "I Am Human" checkbox</p> <div data-bbox="732 1476 959 1514"><p>* <input checked="" type="checkbox"/> I AM HUMAN</p></div>
7	<p>Click the "Send Request" button</p> <div data-bbox="407 1602 1292 1713"><p></p></div>





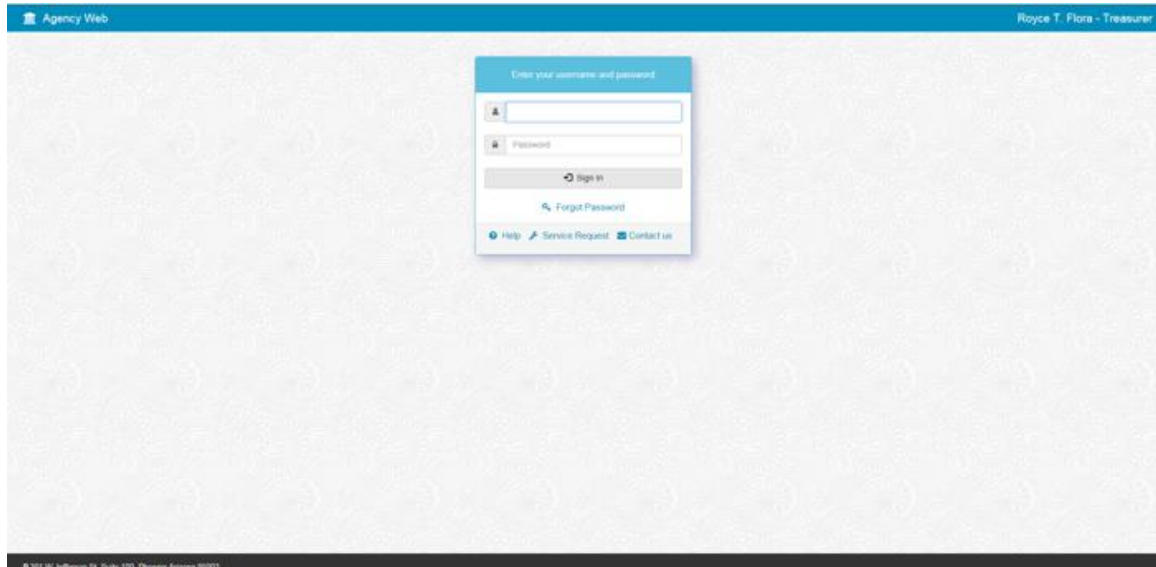
# AgencyWeb Job Aid

## Home Screen and Log On

### Contact Us

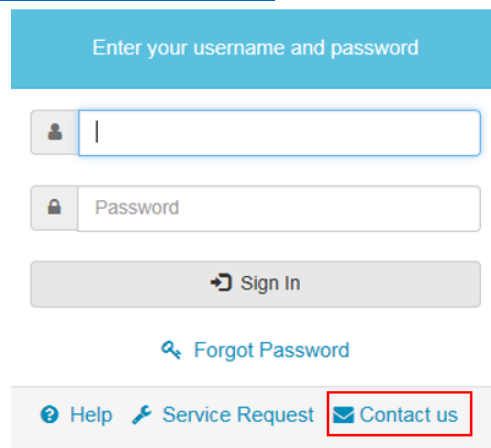
Use this option to contact the Treasurer’s Office when the Service Request and Help options do not address your questions, or when requesting a User Access Form for new access requests (see Job Aid option [Request NEW Access and MODIFY / REMOVE Existing Access](#))

1 Access the AgencyWeb Home Page



2 Click the “Contact Us” link

- This will open a new email address to the Treasurer’s Office
- If an email does not open automatically, create a new email in your email system addressed to: [Treasurer.Accounting@mail.maricopa.gov](mailto:Treasurer.Accounting@mail.maricopa.gov)



3 Enter the Subject Line: **AgencyWeb Request for Assistance**



# AgencyWeb Job Aid

## *Home Screen and Log On*

### Contact Us

- |   |   |
|---|---|
| 4 | <u>Include</u> the following information in your email: <ul style="list-style-type: none"><li>• Complete details of your request (and any steps taken prior to sending this email)</li><li>• Include your contact information (name, Agency, email, and telephone number)</li></ul> |
| 5 | Send the email  |