

# \*ORION Two/Multi-Factor Authentication Overview


## Overview

Two-Factor Authentication (2FA), also known as Multi-Factor Authentication (MFA), is mandatory when logging into Orion and is required for all levels of logins, whether you're an Admin, Advisor, Broker-Dealer, Client, Representative, etc. This policy is in place to help protect your sensitive data and information. Each valid user is granted access to Orion after successfully presenting two pieces of information.

After initial setup, in addition to entering your username and password when logging in, you'll also be asked to enter a registration code for 2FA. You'll be able to select whether this code is sent to you through a text message or a notification to your email. After entering the code, log into the system as usual.

Review the sections below to understand the user experience upon logging in, how to make changes to authentication information (if necessary), and troubleshoot common things that may occur during the process.

### ACCESS LEGEND

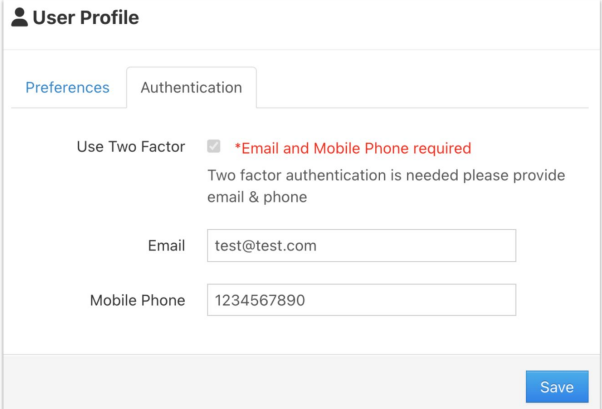
 This icon identifies features where your user experience may differ, depending upon your firm's implementation. For any questions about your setup, please contact your firm's admin.

## Initial Setup Process

When logging into Orion or the client portal for the first time, enter an **email address** and **mobile phone number** where you would like to receive registration codes for 2FA.

If you do not have a valid mobile phone number or email, consider using one that you have access to.

Once you click **Save**, you are redirected to the login page to re-authenticate your username and password.

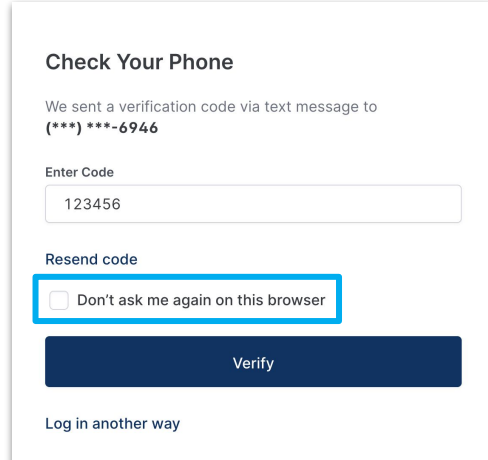
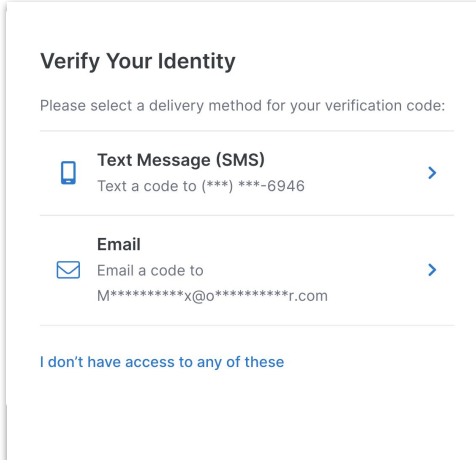
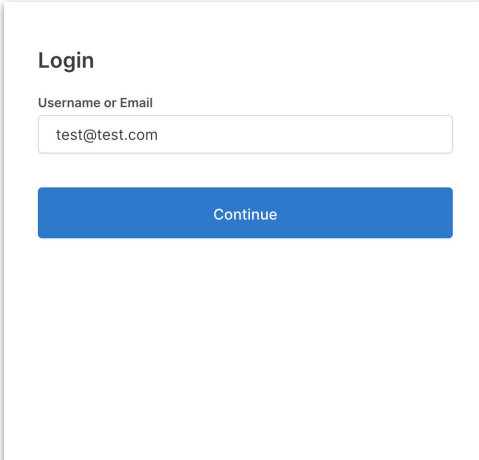


## Routine Login Process

1. Enter your username or email address and password.

2. After you input your credentials, select the delivery method for your registration code

3. After you receive the registration code, enter the code in the box and click Verify to log in.



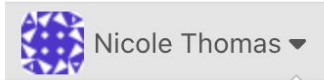
**Please Note:** Check the box **Don't ask me again on this browser** when logging in on a secure machine to reduce the number of times you must enter a registration code at login. The 2FA registration code expires 15 minutes after it is sent. After it expires, you must select 'Resend Code' for a new code to be sent.

## Updating Contact Information

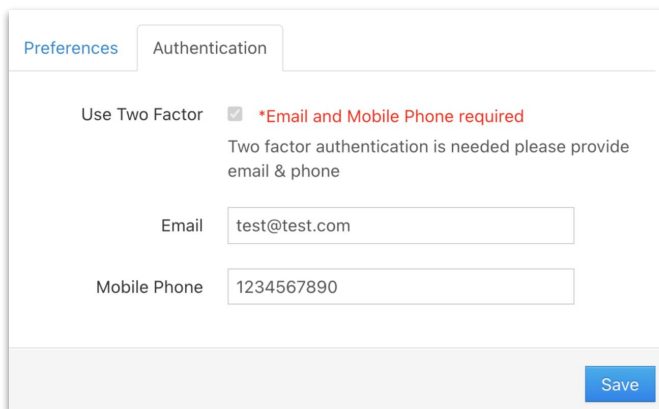
Updating your email address or mobile phone number for 2FA may slightly vary depending on your user interface. Follow the scenario that matches closest with your experience.

### Scenario A

Click your username in the upper right corner and select **Profile**.

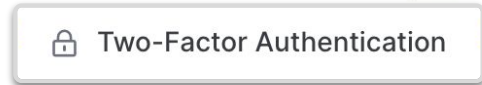


Click the **Authentication** tab and enter your new email or mobile phone number and press **Save**.

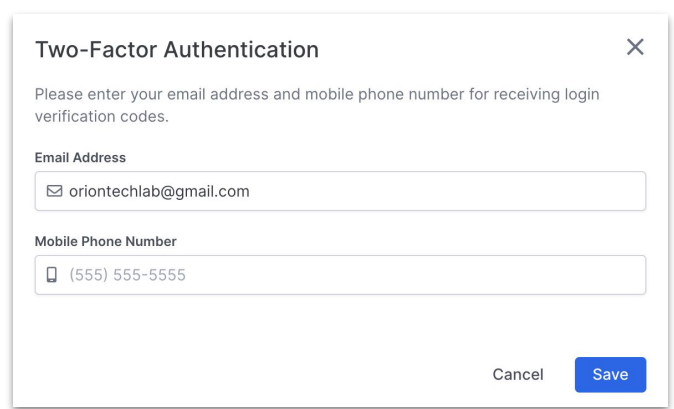


### Scenario B

Click the menu  in the upper right corner and select **Two-Factor Authentication**.

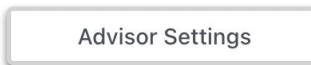


Enter your new email or mobile phone number, and press **Save**.

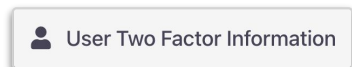


### Scenario C

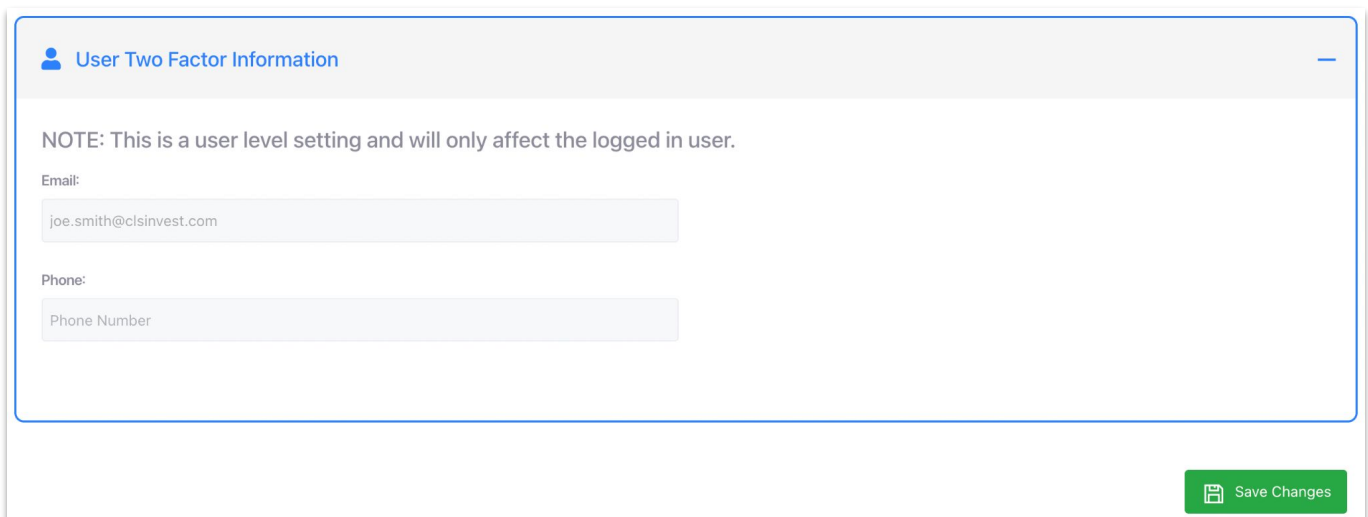
Click your username in the upper right corner and select



Select



, enter your new email or mobile phone number, and click



## Frequently Asked Questions

### Will I be prompted to enter a registration code each time I log into Orion?

After you establish your 2FA information and you've logged in at least one time using a registration code, you won't need to authenticate your information each time if you check the "Don't ask me again on this browser" box when logging in. If you do not check this box, log into Orion using a different device, or clear your cache, you will be prompted to authenticate your information.

### When does the 2FA registration code expire?

The 2FA registration code expires 15 minutes after it is sent. After it expires, you must select the 'Use an alternate registration method' and click Send Code for a new code.

### What is included in the email notification and text message sent for 2FA?

A standard notification is sent from (402) 513-9024 for text messages or portal@orionadvisor.com for email notifications. The text within the notifications for both options is "Your One-Time Registration Code, \*\*\*\*\*."

### What if I forget, or no longer have access to my 2FA email or phone number?

If you are having issues logging into the system, contact an admin at your firm. They will be able to update the assigned phone number and email you established for 2FA.

**FIRM INSTRUCTIONS:** To update a user's 2FA information, navigate to the Manage Users app and select the Representatives or Clients tab depending on the level of the user that you need to update.

Then, right-click on the applicable rep or client and select Edit User. Update the necessary information in the Email and Mobile Phone fields, and that will transfer to their 2FA information.