Xplan Two Factor Authentication

This guide outlines how to setup and activate two factor authentications within Xplan

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Insignia™ Financial

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Introduction

Two-factor authentication (2FA) provides a way of 'double-checking' that you are the person you are claiming to be when you log into your Xplan account.

Currently you log into Xplan with just a username and password, but with 2FA activated, you need to provide two things – your password and a security code before you can access your account. There are two methods of receiving the security code:

- 2FA via Google Authenticator (preferred)
- 2FA via SMS

The guide steps you thought the process to activate two factor authentication (2FA) within Xplan and how to switch between the two methods.

> **If you are unable to see the SMS option when trying to setup 2FA, this means you have not added your mobile number against your login. Please refer to the 'Setting up your SMS number' section for steps to add your mobile number.**

Activating 2FA using authenticator app

We have assumed that you have already downloaded the Google Authenticator app on your phone.
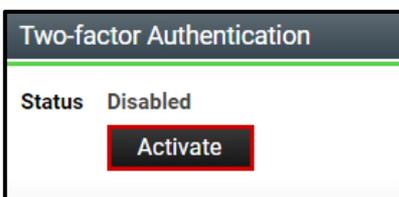

Xplan Setup

The following steps will take you through the Xplan setup process to setup 2FA if you were to use an authenticator app.

Navigate to your preferences by selecting your **username > My Preferences** and then selecting the **Account > Two-factor authentication** menu.
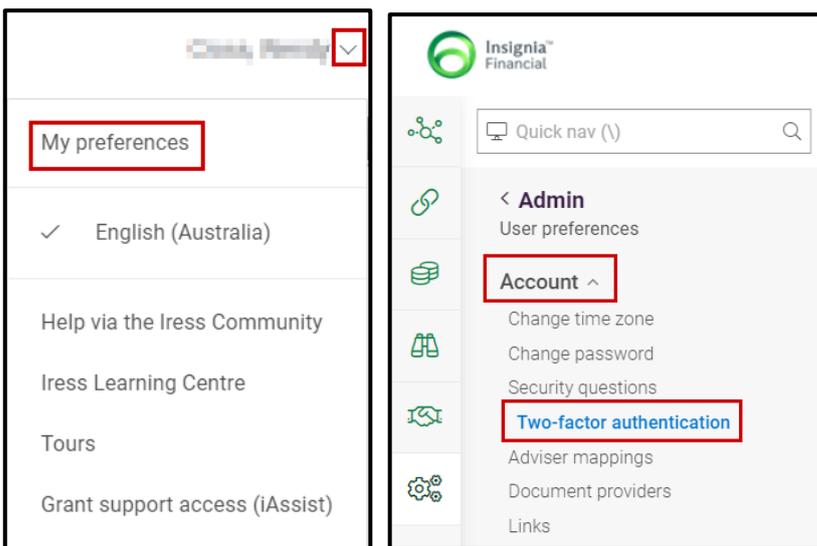
The Two-factor authentication screen will open, select the **Activate** button.

Enter your **Xplan login password** then click **Next**

Select **Software token** and click **Next**

You will be taken to the below screen
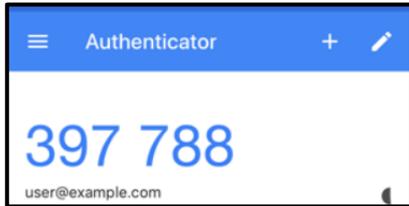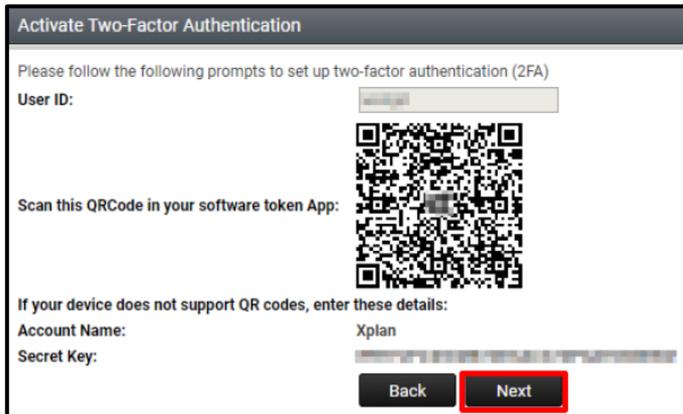
On your mobile phone open the **authenticator app**, tap '**begin setup**' or the **red plus** icon **> tap scan barcode > scan the QR code** on your computer.
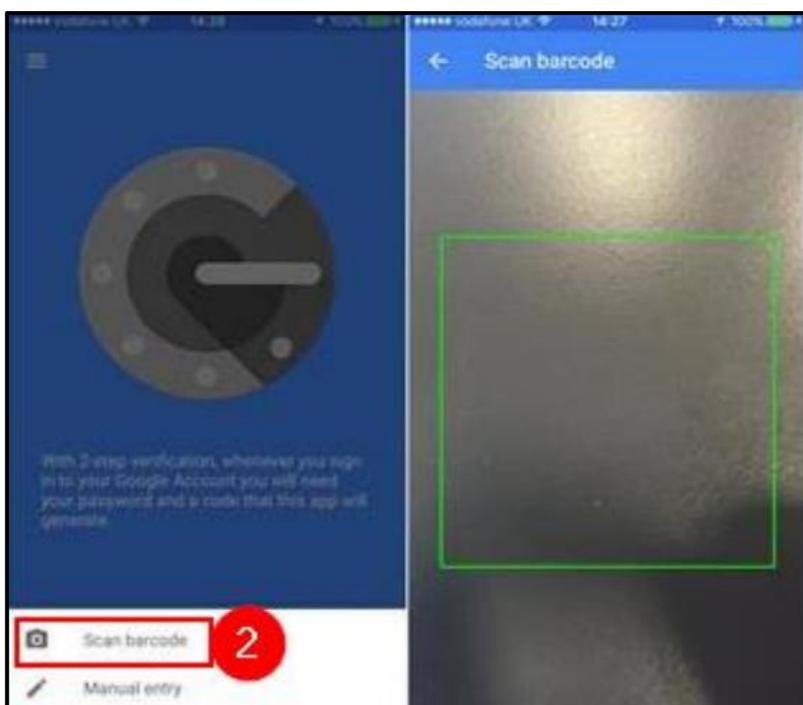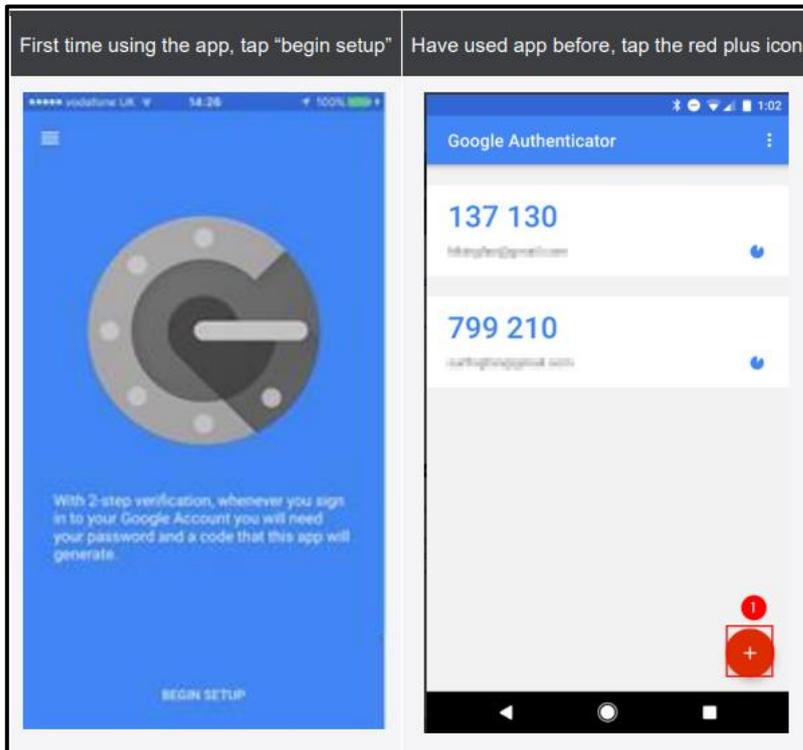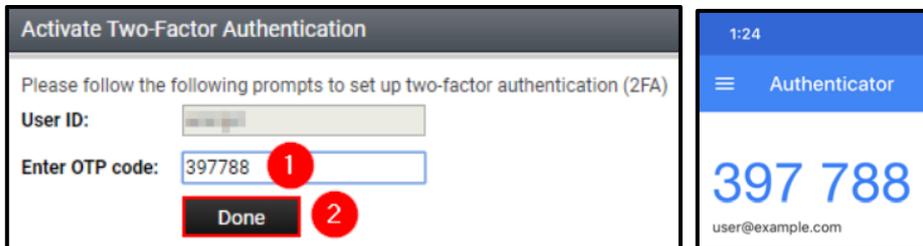
After scanning the QR code you will see a 6 digit code within the app. The 6 digit code is updated every 30 seconds.
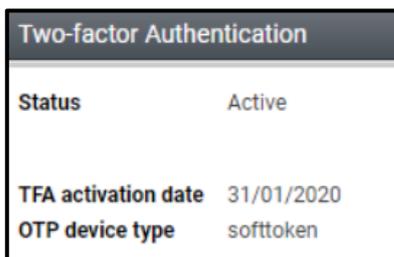

After you have scanned the code on your mobile device, you can click **Next** on your computer.

Enter the 6 digit code that is shown on the app and click **Done**.

You will see this screen when you have successfully activated 2FA.

Activating 2FA via SMS

If you are using SMS for your 2FA method, please ensure a mobile phone number is stored against your profile otherwise the SMS 2FA option will not be visible. To update/add your mobile number please complete the following:

Setting up your SMS number

Navigate to your preferences by selecting your **username > My Preferences** and selecting the **My Details > My details** menu
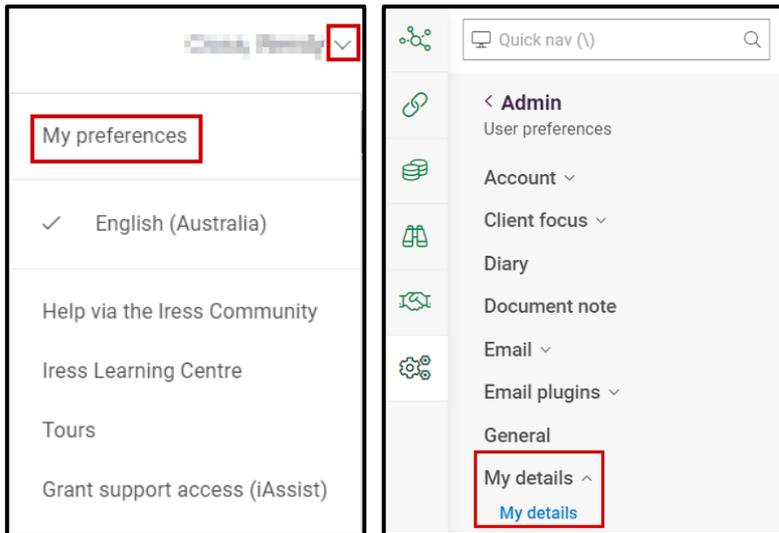
If you already have a mobile phone number stored, click on the **pencil** icon,

If you do not have a mobile phone number stored, click on the **Add** button.
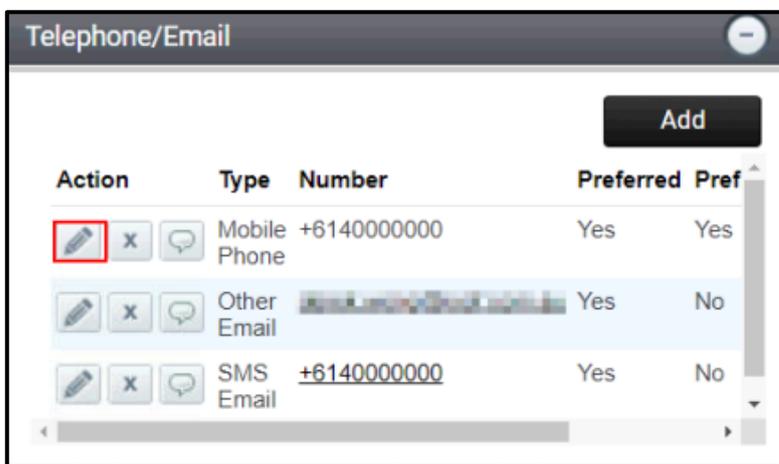
The Contact Details screen opens, ensure the **type** is set to **Mobile Phone**, your **mobile phone number** is entered, and preferred SMS mobile is set to **Yes**, and then click **Save**.

 Note: If you don't want your mobile phone number generating into advice documents, ensure your mobile number in Adviser Preferences is set to SMS preferred (Yes) and Preferred (No). The contact number that you wish to appear in your advice document (e.g. your office landline) should be set to SMS preferred (No) and Preferred (Yes).

Activating 2FA via SMS

Navigate to your preferences by selecting your **username > My Preferences** and then selecting the **Account > Two-factor authentication** menu.
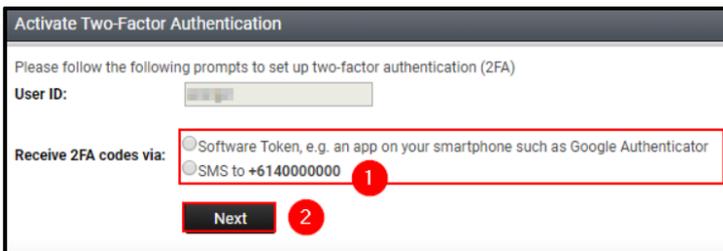
The Two-factor authentication screen will open, select the **Activate** button.
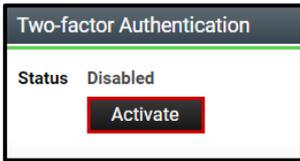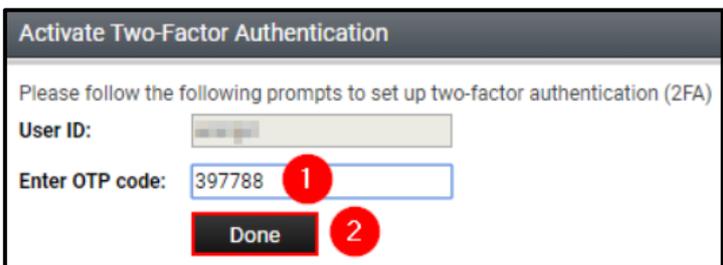
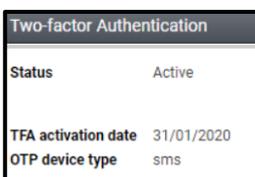Enter your **Xplan login password** then click **Next**

Select **SMS** and click **Next**

Enter the 6 digit code that you received via SMS, click **Done**.

The following screen confirms you have successfully activated 2FA.

Switching 2FA methods

If you wish to switch 2FA methods, you will need to first de-activate your current 2FA setup and then set it up again using any of the two above methods.

Navigate to your preferences by selecting your **username > My Preferences** and then selecting the **Account > Two-factor authentication** menu.
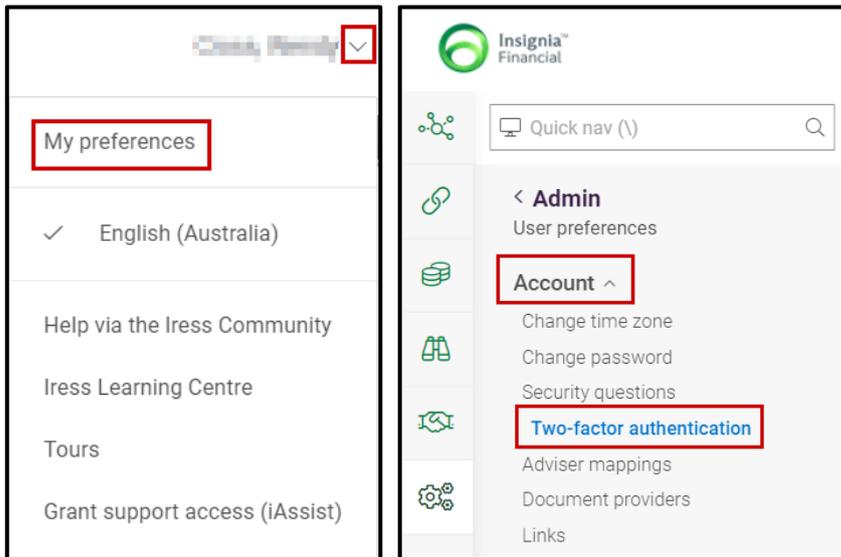
Select the **Deactivate button** and then select **Ok**.
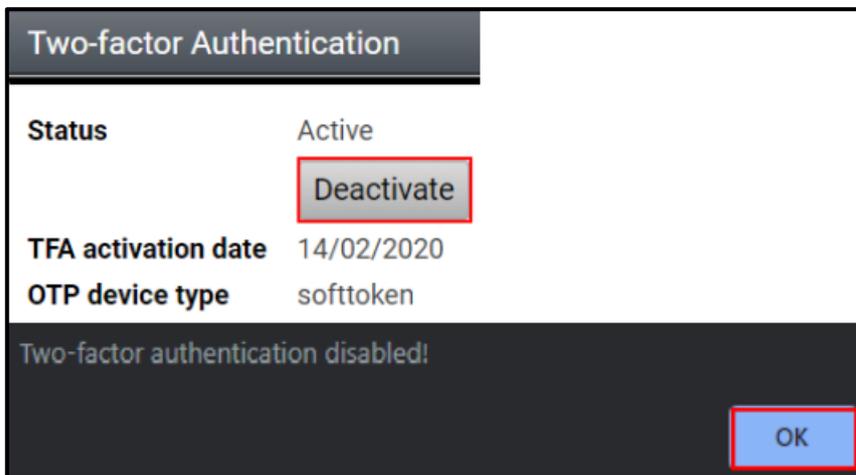
Setup your preferred 2FA option by following the relevant method as outlined in this guide.