

Enrolling in Duo Two-Factor Authentication

Hello! If you're reading this, you're about to see the new Share One Customer Portal for the first time. Before you do, you'll be prompted to enroll your device (probably your smartphone) in Duo two-factor authentication. There are only a few steps, and this document shows you what to expect.

What is two-factor authentication?

Two-factor authentication is a common method of verifying a user's identity by requiring them to provide something they know (password, factor one) and something they have (like a smartphone with the Duo app installed, factor two). This way imposters cannot access a sensitive site like the Customer Portal with just a stolen password.

How does it work?

For most people it works through an app on a smartphone, though you can also use Duo without a smartphone. Every time you log in to the Portal, you receive a Push notification (or a passcode) to the Duo app that you must accept (or enter, if you choose a passcode) before gaining access to the Portal. There will be a short walkthrough of that process at the end of this document.

How do I download the app?

That's exactly what we'll show you over the next few pages.

Important Note About Admin-level Access

All users have the same low-level portal access permissions when they first log in regardless of position at the credit union. Each credit union needs to determine who they want to elect as an Admin user. That user needs to notify Scott Bush at Share One with a request for Admin-level access, at which point they (the admin user) can set access levels for all other staff as they see fit. The permissions for each access level and instructions for modifying user access are in the Portal Help doc, which you can find via the Help link inside the Portal.

Admin-level users also have access to the Duo Admin panel, where they can delete and disable users when necessary.

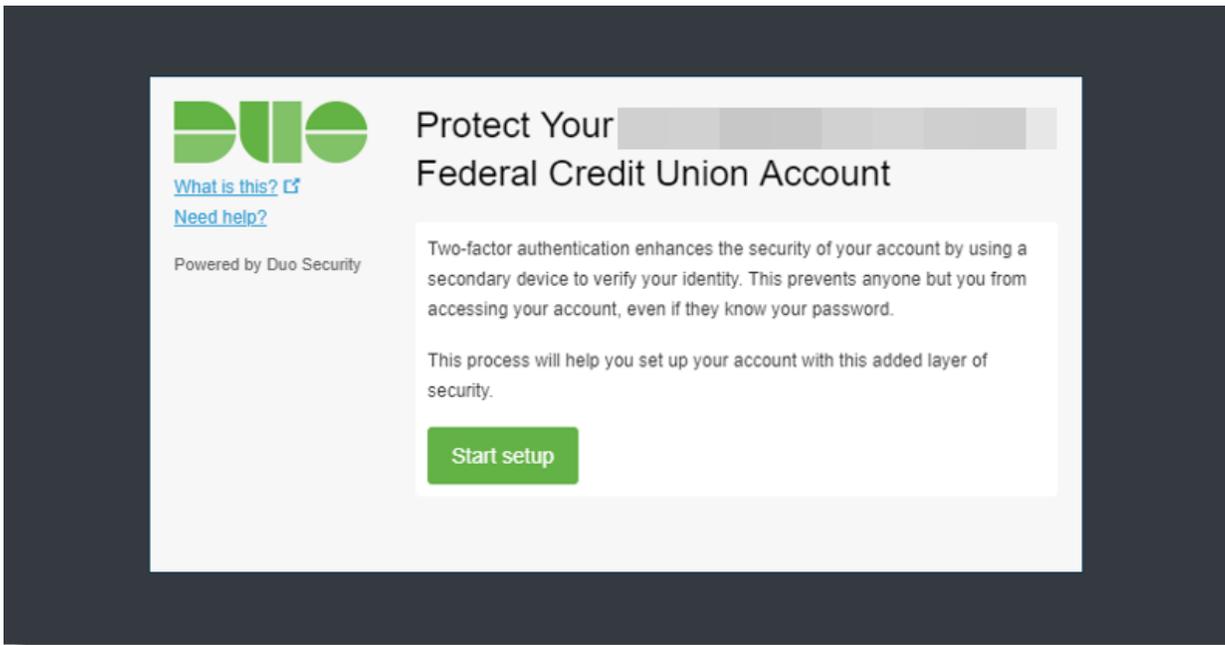
Step 1: Log In with your Citrix/NSSC Credentials

Your Customer Portal login credentials are the same as what you already use for system logins. If your credit union currently uses autologin and some of your staff do not remember their username and/or password, someone at your credit union should contact Share One’s Support department to initiate a fix for the staff.

Logging in automatically triggers initial Duo setup, so have the device you plan to install the app on ready.

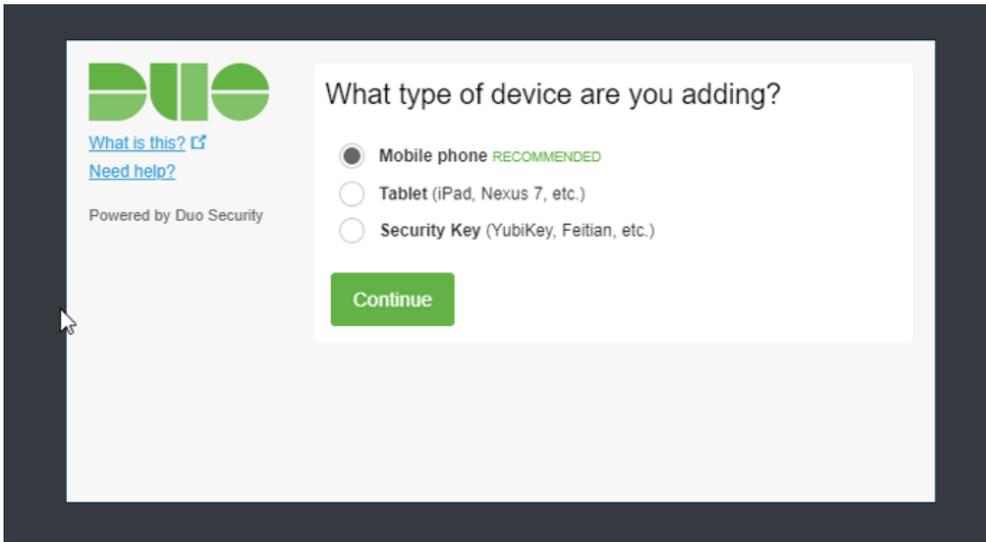
Step 2: Start Duo Setup

A Duo prompt appears. Read the text and click **Start Setup**.



Step 3: Select Your Device

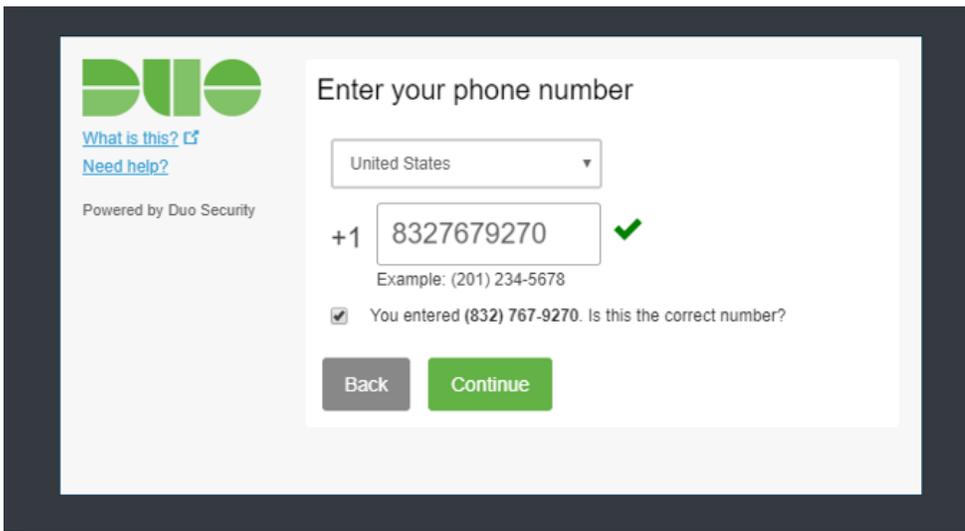
Your device options are Mobile Phone, Tablet, or Security Key. Security Keys are small devices (they often look like a USB stick) with a button that can be clicked to authenticate. In our context, keys can be used if a staff member does not have access to a smartphone, but they must be purchased separately. We strongly recommend using a mobile phone.



Click **Continue** once you've selected an option. The instructions going forward assume that you've selected a mobile phone to enroll. For details on security key enrollment, go [here](#).

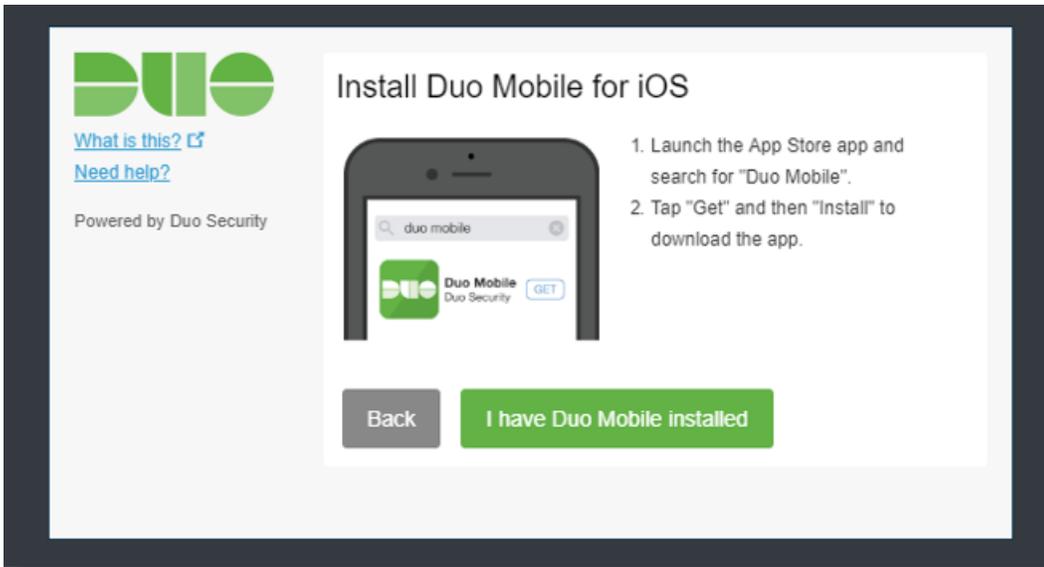
Step 4: Enter Your Phone Number

On the next screen enter your device's number.



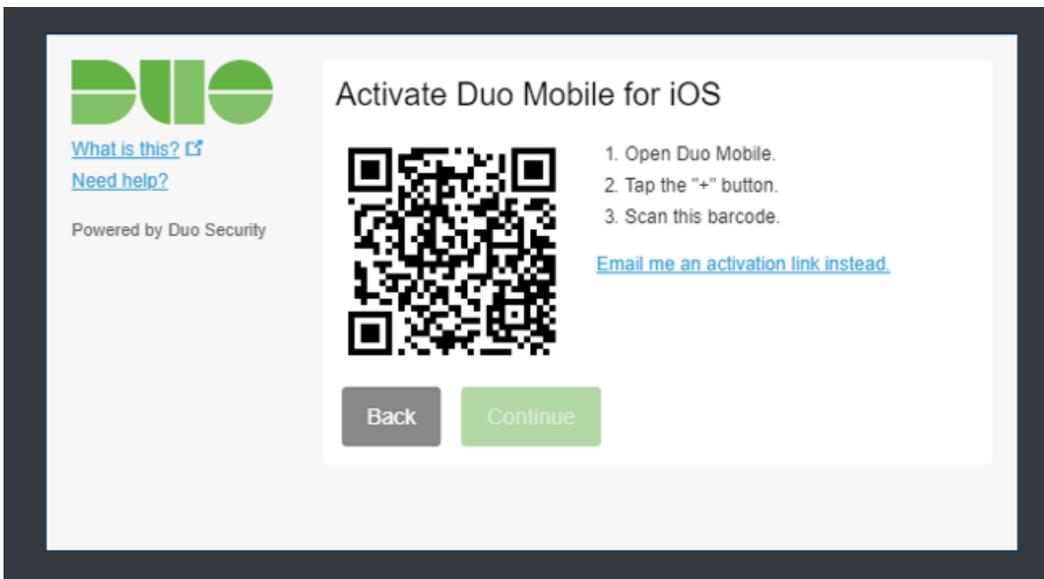
Step 5: Download the Duo App from your App store

Search for "Duo Mobile". The app is free. Once it's downloaded and installed, click **I Have Duo Mobile Installed**.



Step 6: Scan the Barcode

Open the app and follow the instructions to scan the barcode that appears on your computer screen. Alternatively, you can have an activation link emailed to you at an email address you specify.

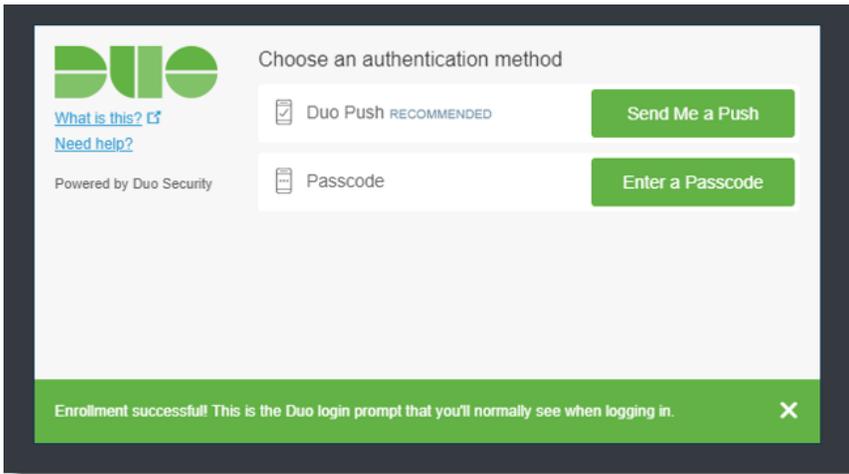


A green checkmark will appear if the scan works. Once the green checkmark appears click **Continue**.

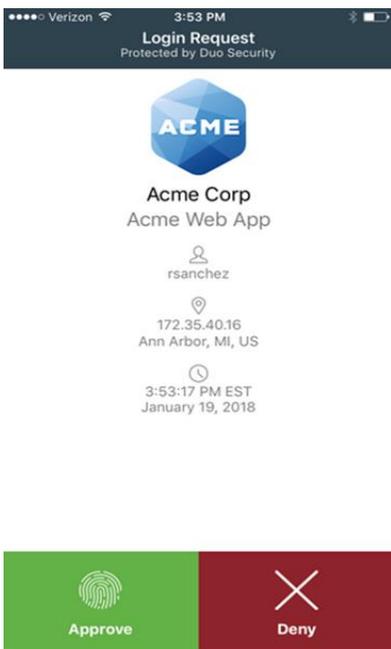
Step 7: Send Me a Push

You're enrolled! Now to authenticate. The Authentication Method prompt appears. **This is the same prompt you'll see every time you log in.** Your options are:

- Send Me a Push – The easiest, and what we recommend. A Push notification appears on the app. You open it and click Approve.
- Enter a Passcode – A passcode is sent to the app. You click the Passcode area to display it, then type it into the computer prompt.



Push Notification



Passcode

