Setup Two Factor Authentication

Last Modified on 03/18/2026 5:37 pm EDT

Two-factor authentication (2FA) is quickly becoming the standard setup for any user needing to login to a system that contains secure data. The two-factor authentication process requires a user to have

1. User ID
2. Password
3. Company ID
4. Token

Currently, all users must enter a User ID, Password and Company ID when logging into the application. By implementing two-factor authentication, this requires a token to be sent via text, email or Authenticator to the user. This token is then entered as part of the login process.

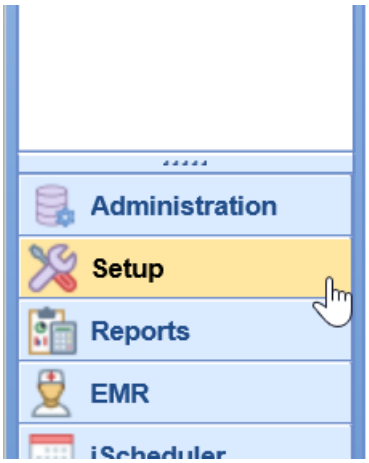
Company Settings (Future Release)

There are 2 Company Settings associated with two-factor authentication in the database.

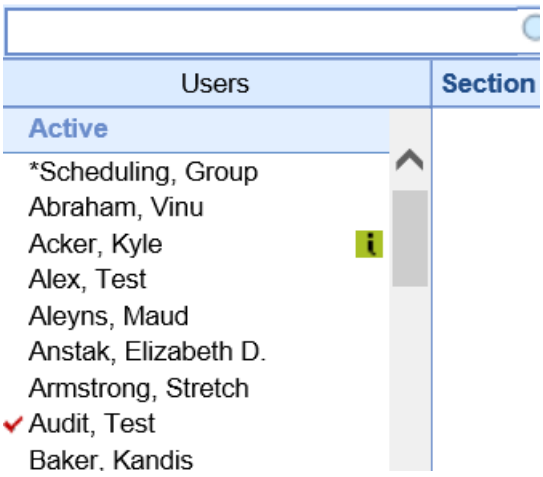
- Company Setting to require 2FA for all database users
- Company Setting to exclude 2FA by IP range
    - local LAN subnet to exclude in office logins

Steps

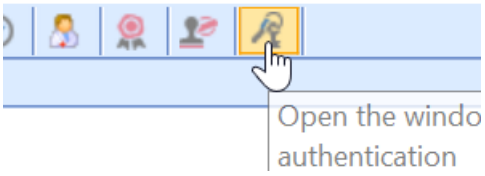
1. **Login** to the application as a user that has Administrative privileges
2. Navigate to the **Setup** portal



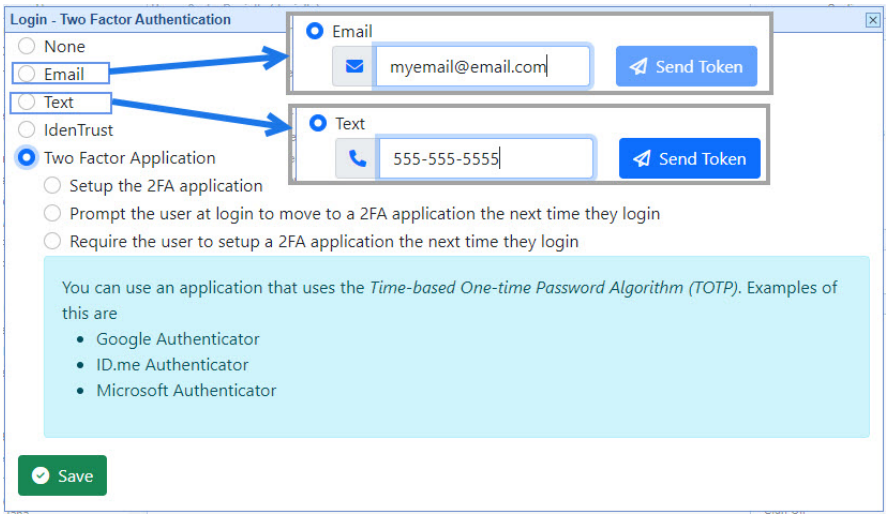
3. Click **Users**
4. Select the **user** that you want to modify form the list on the left



5. Open the **Two-Factor Authentication** setup window



6. Set the desire Two-Factor Authentication Method
    - None = Two-factor authentication is off
    - Email = Two-factor token sent via email to a designated e-mail address
    - Text = Two-factor token sent via text to a designated phone number
    - IdenTrust = User must authenticate via an IdenTrust USB token.
    - Two Factor Application = User must authenticate via an Authenticator such as Google Authenticator, ID.me Authenticator, Microsoft Authenticator.
7. Enter the appropriate information depending on the method selected from above.



8. If using a third party application, there are 3 options for user setup
    1. Setup 2FA to use for the next login
    2. Prompt the user to setup 2FA at next login
    3. Require the user to setup 2FA at the next login
9. Click **Save** to save changes

Note: If Two Factor Application has been set up for a user and needs to change to a different application under the 2FA Setup window, select None, Save, then set Two Factor Application and Save. This will prompt the new Application setup.