Multi-Factor Authentication – User Guide

Self-service User Portals
1.  https://mfa.canaccord.com/multifactorauth
   a.  Enroll here to access Canaccord remote access or Canaccord password management systems

2.  https://aka.ms/mfasetup (or https://aka.ms/setupsecurityinfo)
   a.  Enroll here to access Office 365 or Azure cloud applications.

Methods of Authentication
You have a choice between 4 methods of authentication, and you can switch your method at any time using the self-service user portal: https://mfa.canaccord.com/multifactorauth and https://aka.ms/mfasetup

1. Mobile App (Recommended)
   How it works:
   You will receive a prompt from the Microsoft Authenticator app on your smartphone asking you to tap Approve to complete your authentication.

   ![Approve sign-in?](image)

   Requirements:
   •  Apple, Android, or Windows smartphone or tablet.
   •  Data or WiFi internet connection.
   •  Push notifications enabled.

   Installing the Mobile App:
   •  Search for “Microsoft Authenticator” from your mobile device’s app store and install it.
   •  Activate with your Canaccord Genuity MFA account from the self-service portal.

2. Phone Call
   How it works:
   You will receive a phone call with an operator asking you to press # on your phone to verify your authentication.

   Requirements:
   •  Any type of phone with a # button.

3. Text Message
   How it works:
   You will receive a text message on your mobile phone with a 6 digit verification code, enter the code into the website you are logging into.

   ![Enter this code into the website to complete your sign in verification.](image)

   Requirements
   •  Any mobile phone capable of receiving and sending text messages.

4. OATH Token
   How it works:
   a) Mobile App token
You will enter the 6 digit code that is displayed on the mobile device into the website you are logging into.

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b) **Hardware token**

You will enter the 6 digit code that is displayed on the hardware token into the website you are logging into.

*Note: this would be the last method of choice, if all other methods do not fit your needs.*

Requirements:

- For the mobile app token method: Apple, Android, or Windows smartphone or tablet with the Microsoft Authenticator App (*Data and WIFI is not required for the authentication code*).
- For hardware token method: an OATH hardware token issued by Canaccord IT.

**User Enrollment** - https://mfa.canaccord.com/multifactorauth/

1. Go to the **Multi-Factor Authentication User Portal**: https://mfa.canaccord.com/multifactorauth/
   a. For enrollment, go to the website from your Canaccord computer.
   b. You may access the website from any computer at any time to update your settings.
2. Type in your **Canaccord credentials**. Same username and password you use to login to your office computer.
3. **Choose an authentication method** you prefer and complete the requirements for the method.

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For users using the **Mobile App** method (or OATH Token method from their mobile device) follow these steps to activate your account:

- If you have not done so, **install the Microsoft Authenticator app** on to your mobile device. Ensure your mobile device can connect to the internet and **allow push notifications for the app** when prompted.

- **Click on the Generate New Activation Code button** under the **Activate Mobile App** menu.

- Open the Microsoft Authenticator App on your mobile device and select **add account** and **scan QR code** option. Hold your mobile device’s camera to your computer monitor and scan the QR code. (You can manually type in code and URL also).

**OR SCAN QR CODE**

- After scanning the QR code, **the activation is complete**.

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*The 6 digit Authentication Code displayed is primarily for OATH Token users. It is also a fallback method for Mobile App users.*

*For example, a mobile app user who fails to verify their authentication, because they have no internet signal at the moment or they accidently tapped on cancel instead of verify, will be asked to enter the 6 digit code from the app and thus given a second opportunity to complete their authentication.*
For users using the **Phone Call** or **Text Message** method, follow these steps to complete your settings:

- Enter in the **phone number** you will be using along with the appropriate **country prefix**.

4. **Answer four of the Security Questions.** These questions will be used to validate your identity if you need support or for fallback in case you cannot get into the user portal.

5. **A welcome screen will be displayed once your enrollment is complete.**

6. **Afterwards, you will see a list of the self-service menu options available for you to update your settings if needed.**

7. **Go to the Change Method Menu and confirm you have selected the method you want.**

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**User Enrollment - https://aka.ms/mfasetup**

1. **Go to the Multi-Factor Authentication User Portal: https://aka.ms/mfasetup**
   
   a. For enrollment, go to the website from your Canaccord computer.
   
   b. You may access the website from any computer at any time to update your settings.

2. **Type in your Canaccord email address** if prompted for username, and then click next.
3. Click set up you prefer and complete the requirements for the method.

Keep your account secure

Sometimes your organization needs more info to make sure it's you. Set up the security info below so you can prove who you are.

- Authenticator app
  Set up your mobile app and approve a notification
  
  Set up

- Phone
  We’ll call or text you to verify your phone number

For users using the Authenticator App method (or OATH Token method from their mobile device) follow these steps to activate your account:

- If you have not done so, install the Microsoft Authenticator app on to your mobile device. Ensure your mobile device can connect to the internet and allow push notifications for the app when prompted.

- Click on the Set up button, and click next

  Get the app
  On your mobile device, install the Microsoft Authenticator app. Learn more

  Cancel  Next

- Open the Microsoft Authenticator App on your mobile device and select add account and work or school account option. Hold your mobile device’s camera to your computer monitor and scan the QR code. (You can manually type in code and URL also).

  Scan the QR code
  Use the app to scan the QR code below. This will pair the app with your account.

  Set up your account
  If prompted, allow notifications. Then add an account, and choose “Work or school account”.

  Cancel  Next

- After scanning the QR code, click Next to test the authentication on the app. Tap approve when prompted on the mobile app, then your activation is complete.

  Let’s try it out
  Approve the notification we’re sending to your app.
  Sending notification

  Cancel  Done

  Let’s try it out
  Approve the notification we’re sending to your app.
  Notification approved

  Cancel  Done
Set up your mobile phone number to act as a fallback option in case your mobile app is not functioning.

For users using the **Phone Call** or **Text Message** method, follow these steps to complete your settings:

- Enter in the **phone number** you will be using along with the appropriate **country prefix**. Choose your preferred option of a **call** or **text message** for verification and click **next**.

- If you chose the **phone call** option, you will receive a phone call asking you to **press #** to finish authentication. If you chose the **text message** option, you will receive a **6 digit code** to verify your authentication; once verified, click **done**.

4. You may change your method at anytime via this user portal and adjust or re-enroll the other options that are available.

5. You are encouraged to complete the security questions to further secure your account by clicking **Add security info**, then **Security questions**.

**Reporting Fraud**

If you encounter an instance where you receive an authentication prompt for Multi-Factor Authentication, *which you did not initiate*, it most likely means someone is attempting to login with your Canaccord account. In these cases, we encourage you to report fraud through these simple steps.
### How to report fraud:

**Mobile App Users:** You receive a prompt asking you to tap approve, but you have not attempted to login. Instead of tapping approve, tap the **Deny** button on your smartphone.

**Phone Call Users:** You receive a call asking you to finish your verification, but you have not attempted to login. Instead of pressing #, **Press 0 #**.

**Text Message Users:** You receive a text asking you to reply with the verification code, but you have not attempted to login. Instead of replying with the code in the text message, reply and **send 0** as the text message.

### After reporting fraud:
- A notice will be generated for Canaccord IT administrators.
- Your Multi-Factor Authentication method will be **blocked** in the meantime.
- A Canaccord IT administrator is required to unblock your account after investigating.

### Troubleshooting

#### Mobile App

**Not able to activate the mobile app.**
- Ensure your mobile device is connected to the internet. Check by seeing if you can go to your favourite website from your device’s browser.
- Ensure you have push notifications turned on for the Microsoft Authenticator app.
- Turn off your mobile device and turn back on, and try again.
- Uninstall the Microsoft Authenticator app, and re-install from your mobile device’s store.
- If you are scanning the QR code, make sure your camera lens is clean.
- If you are manually typing in the code and URL, make sure you type in the fields exactly as displayed on the user portal website.

**Not receiving notifications to verify my authentication.**
- Ensure your smartphone is connected to the internet. Check by seeing if you can go to your favourite website from your device’s browser.
- Ensure you have push notifications turned on for the Microsoft Authenticator app.
- Open the Microsoft Authenticator App. This will search for authentication requests if they did not come into your smartphone in time.

#### Phone Call and Text Message

**Not receiving a phone call or text message to verify my authentication.**
- Ensure your phone has reception, by placing/receiving a test call or sending/receiving a text message successfully.
- Ensure your phone number is inputted correctly in your user portal settings, along with the correct country prefix.

#### OATH Token

**Failed attempt after typing in the 6 digit code into the website I am trying to authenticate in.**
- Wait for the 6 digit code to change numbers on your mobile app (or hardware token) and try again. The numbers will change every 60 seconds.

**Hardware token is not displaying any numbers.**
- It most likely ran out of batteries; please ask your Canaccord IT support team to issue you a new one.


**Not able to logon.**
- Ensure your Canaccord username and password is valid. It is the same credentials as your office computer.
- If you are setting up your MFA method for the first time, your local IT team will need to add your Canaccord account into a security group to allow you access.

**If logging on externally (outside the Canaccord network).**
- After entering your Canaccord username and password, you will need to verify yourself with your multi-factor authentication method.
- If your multi-factor authentication method is not accessible, please wait 2 minutes after entering your username and password for a fallback security question to appear on the website, and then enter in the correct answer.