

Introduction to MFA

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Empowering
the Financial World



What is MFA?

Flow...



Getting Started

Checklist

- **Must be on Relius version 2018.0 or higher**
- **Which provider best suites your needs?**
 - IDP Infinity
 - Twilio
- **Readiness?**
 - Are your participants and contacts ready for MFA?
 - Contact Support to get Started

Checking for Readiness

Reports

The screenshot displays the 'Report Writer Reports' application window. On the left is a tree view of report categories, with 'Multi-factor Authentication' selected. The main area shows a table of reports and various configuration options.

Orient	Font	Report Description	File Name
P	8	Participant MFA Readiness	MFA_Stats
P	8	Participants with OTP MFA Device	MFA_EeW/ithOtpMfaDev
P	8	Sponsor MFA Readiness	MFA_SponsorStats
P	8	Advisor MFA Readiness	MFA_AdvisorStats

Configuration options include:

- Options: Plan (Single Plan), Division (All Divisions)
- Employee(s): All employees, Print masked SS#
- Date selection: From (User specified), To (User specified), Balance basis (Trade date (cash balance))
- Additional options: Additional Selections
- Data option: Prepare data & print report, Printing to: Window
- Starting page offset: 0

A 'Select Options' dialog box is open, showing the option to 'Include all plans in a single report' (unchecked). A red arrow points from the 'Additional options' button in the main window to this dialog box.

Readiness Report Output

Participant

Participant MFA Participation Analysis			
Plan ID	Plan Name	Active Participants	Ineligible Participants
		-----	Without Email/Phone Number -----
TinaMFA	Tina MFA Automation Plan	2 out of 2	0 out of 0
			2 out of 12

Ineligible employees exclude terminees
Inactive participants exclude participants with no balances

Sponsor

Analysis of One-time PIN Multi-Factor Authentication Readiness for Plan Sponsors		
Plan ID	Plan Name	Without Email/Phone Number
TinaMFA	Tina MFA Automation Plan	0 out of 3

Advisor

Analysis of One-time PIN Multi-Factor Authentication Readiness for Plan Advisors		
Plan ID	Plan Name	Without Email/Phone Number
TinaMFA	Tina MFA Automation Plan	0 out of 3

Vendor Setup

- **Utilities > VRU/Web Administration > Maintenance**
 - Utilities > Vendor > Setup
 - Double click on Vendor (IDP / Twilio)

Modify Vendor

General information

Format:

TPA ID:

IdP API User Name:

IdP API Password:

IdP API Key:

IdP Web Service URL:

Relius web URL:

Test Phone:

Notification Email:

Certificate

Certificate:

Password:

Certificate information:

Property	Value
Property	Value

One-time PIN Messaging

Language: Type #PIN# for one-time PIN place holder

One-time PIN text delivery options

Message

Please enter this one-time PIN for your retirement account: #PIN# This PIN will only be valid for 5 minutes: Relius Test.

One-time PIN voice delivery options

Message Pause duration after OTP: seconds

One-time PIN email delivery options

Return address:

Sender name:

Subject:

Message

B **I** **U** **L** **A** **S** **T** **R** **E** **T** **C** **O** **L** **O** **R** **E** **S** **T**

Please enter this one-time PIN for your retirement account: #PIN# This PIN will only be valid for 5 minutes: Relius Test.

Please enter this one-time PIN for your retirement account: #PIN# This PIN will only be valid for 5 minutes: Relius Test.

Web Options Setup

- **Setup for each Website**

- Select vendor (Same vendor for all sites)
- Enable CSR
- Enter Recognized device days
 - djflha

Multi-factor authentication

Enable one-time multi-factor authentication (based on plan web settings).
Provider:

Enable one-time pin multi-factor authentication for CSR
Recognized device logic expiration: days

Permitted one-time pin delivery methods:

	Method	Participants	Sponsor/Adviso	▲
1	SMS text message	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
2	Voice call	<input type="checkbox"/>	<input type="checkbox"/>	
3	E-mail	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
4	Google Authenticator	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

Plan Setup

- **Participant / Sponsor**

- Data Entry > VRU/Web Setup > Single Plan Setup

Participant web profile settings for: Participants

The options found under the VRU/Web menu will enable features for the Participant Web, CSF, and VRU applications.

Multi-factor authentication

Enable one-time pin multi-factor authentication

- **Advisor**

- Data Entry > VRU/Web Setup > Global Advisor Web Setup

Multi-factor authentication

Enable one-time pin multi-factor authentication

Web Experience

- Select Device

One-Time PIN Required ✕

Additional authentication is necessary to continue the login process. Select the delivery method of your One-Time PIN below and continue to the next step.

(904)3**-***8
o*****@msn.com
p***@fisglobal.com**
Use Google Authenticator

Note: In order to receive your One-Time PIN, it is important to update your account with any changes in your mobile phone number or e-mail. Phone number should be capable of receiving texts. Messages & Data rates may apply.

Web Experience

Continued

- Enter One-Time PIN

One-Time PIN Required ✕

Additional authentication is necessary to continue the login process. A One-Time PIN has been sent to the email address you have on file: **p*****@fisglobal.com**. Retrieve your pin and enter it below.

One Time Pin:

[Resend PIN \(Link will be enabled in 6 seconds\)](#)

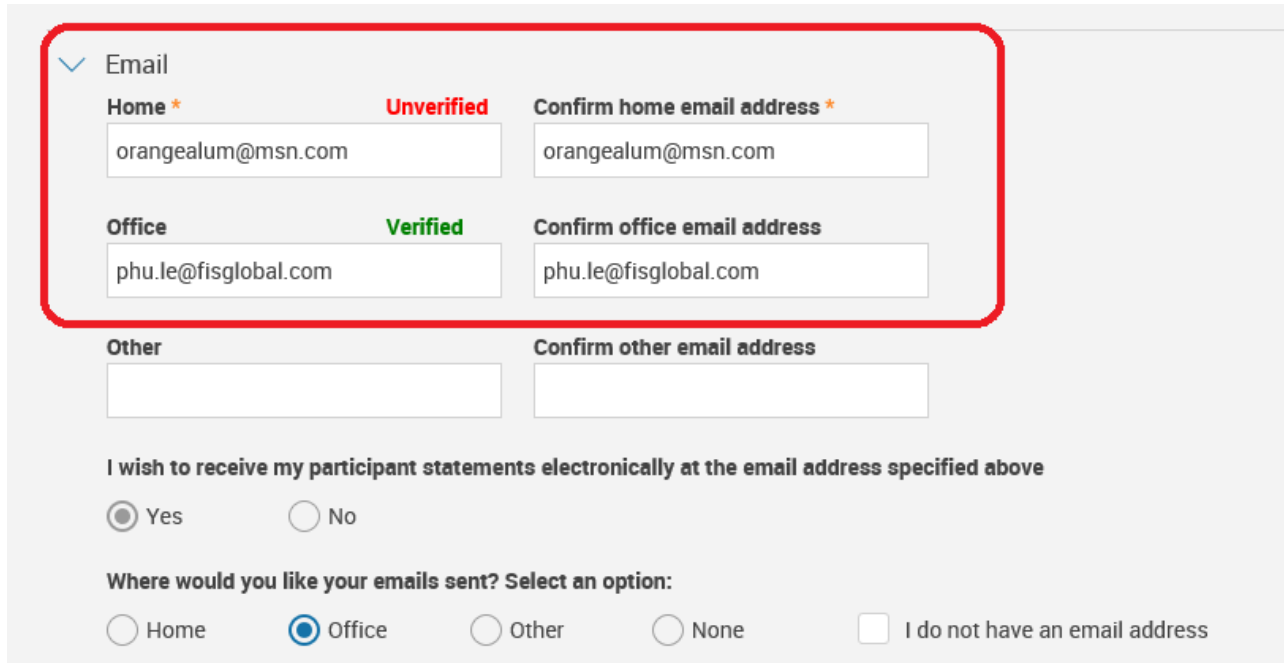
Device Registration: Do not remember this device.

Remember this device. This is my computer or mobile that I use regularly.

Note: In order to receive your One-Time PIN, it is important to update your account with any changes in your mobile phone number or e-mail. Phone number should be capable of receiving texts. Messages & Data rates may apply.

Email Verification

- Verified / Unverified email



✓ Email

Home * Unverified	Confirm home email address *
<input type="text" value="orangealum@msn.com"/>	<input type="text" value="orangealum@msn.com"/>
Office Verified	Confirm office email address
<input type="text" value="phu.le@fisglobal.com"/>	<input type="text" value="phu.le@fisglobal.com"/>
Other	Confirm other email address
<input type="text"/>	<input type="text"/>

I wish to receive my participant statements electronically at the email address specified above

Yes No

Where would you like your emails sent? Select an option:

Home Office Other None I do not have an email address

When does OTP apply?

- **Send OTP when user requests withdrawal and loans**
- **Personal info changes occur in remember scenario**
 - This includes email changes in transaction wizard
- **Available with SSO with above scenario**

MFA Implementation Facts

- **How long does the process take?**
 - ASP?
 - 3 Weeks
 - Installed?
 - 4 Weeks
- **How many Relius users have requested IDP?**
 - 40 clients
- **What are the top issues you will face with the IDP Implementation?**
 - Firewall rules have been the major roadblocks

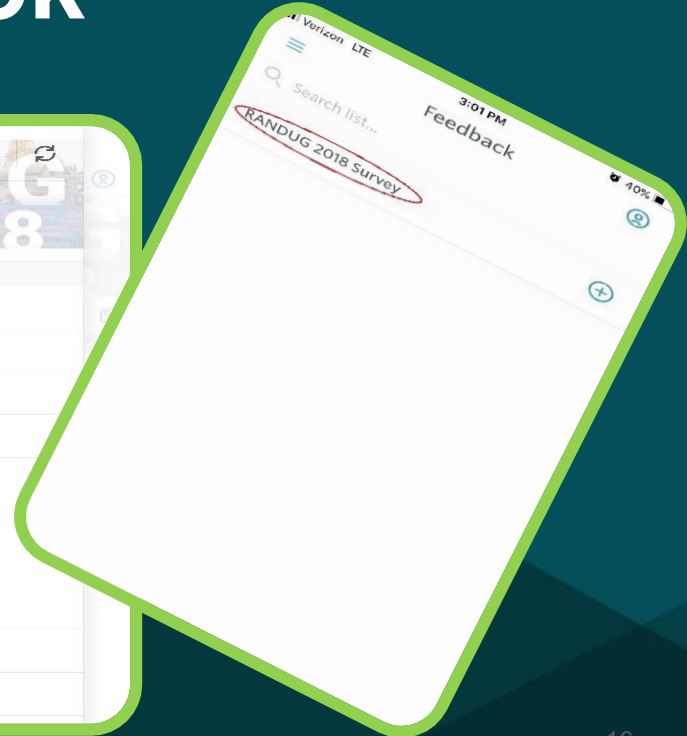
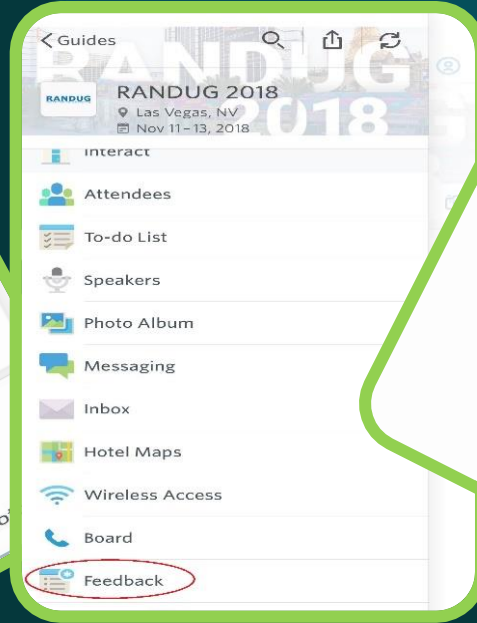
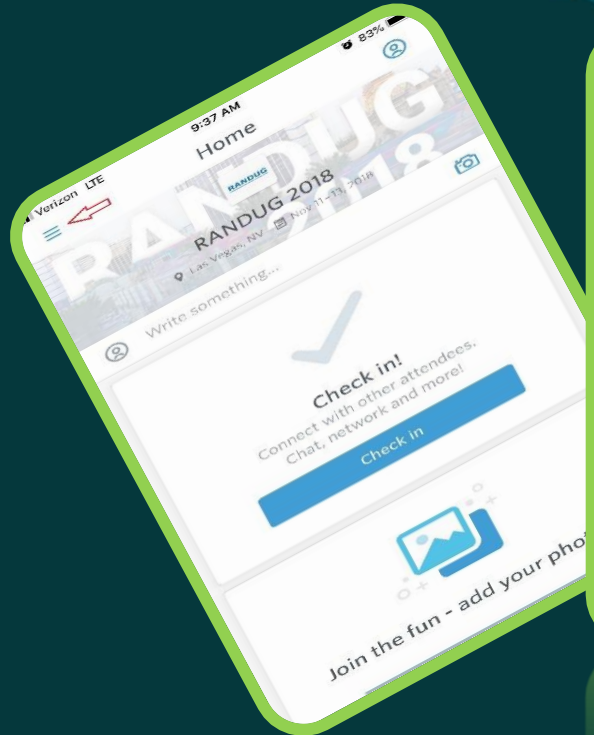
Comments?

What MFA enhancement would you like to see in the future?

Questions?



Survey on Guidebook



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