Guide to Our Cat Herder Two-Factor Authentication (2FA)

There are two scenarios where you might enable Two-Factor Authentication (2FA) on your Our Cat Herder account:

A. You choose to proactively do this yourself or
B. your board administrator will enforce/require it for the whole board.

For either method the process to enable is almost identical, however in the case where the board administrator has enforced 2FA activation you cannot access the portal until you set up 2FA.

We recommend reading this guide in its entirety before starting 2FA configuration.

> ***Administrator Note:***
>
> *If you are an administrator we highly recommend informing your portal users before activating enforced 2FA for the entire board as many board members may not be familiar with 2FA. Activating enforced 2FA right before a meeting can also be problematic as members cannot access the portal until it is set up. We suggest ensuring you have discussed with members about setting 2FA up and also be ready to assist non-technical members with some steps of the process (particularly setting up their device with an appropriate Authentication App).*

Setting up 2FA: What you Need

To setup 2FA on your Our Cat Herder account you will need:

1. An Active Our Cat Herder Account
2. Authentication App Installed on your device

An Active Our Cat Herder Account

Your portal administrator will have invited you to your organisation's Our Cat Herder portal.

You will need to ensure you have activated the account (you can successfully login) before setting up 2FA.

In the case of admin enforced 2FA where you have a brand new account you will set a new password and then be immediately asked to set up 2FA.

Authentication Application Installed on your phone/device

On your device (typically a phone) you will need to have an authenticator application installed such as Microsoft Authenticator, Google Authenticator or Authy.

The Authenticator App will be used for generating the six digit codes you need to input on login once 2FA is set up on your Our Cat Herder account.

Do not start the 2FA process on Our Cat Herder until you have an authenticator app installed.

Note to iOS 15+ Users

Since iOS 15 Apple has offered a Built-In Code Generator for 2FA. Sometimes this is enabled with the user of the device realising.

The iOS Built-In Code Generator for 2FA unfortunately can cause issues if it is not your primary 2FA app (eg: you already use Authy, Microsoft or Google Authenticator).

Unless the iOS Built-In Code Generator for 2FA is your primary way for managing 2FA/MFA (you already use Authy, Microsoft or Google Authenticator). We recommend turning it off.

To turn off the OS Built-In Code Generator for 2FA follow the below steps:

Open "Settings"

Scroll to "Passwords"

Select "Password Options"

Under "Set Up Verification Codes Using:" ensure that you select your main 2FA authenticator app (eg: Authy, Microsoft or Google Authenticator) instead of "Keychain".

Once this is done your iPhone should now use your preferred 2FA application.

Step 1: Install an Authenticator App

Install an Authenticator App on your device (such as phone or tablet). This will be used to generate the 6 digit codes you need to enter into Our Cat Herder.

As there are many device types and configurations and different authentication apps, if you need assistance with this step, we recommend you ask someone you trust with your IT to assist you.

Note: If you lose your device, erase it, uninstall the Authenticator App or get a new device you may not be able to access your OCH account any more. Some Authenticator apps like Authy offer ways to ensure this cannot happen. However this is why it is essential to make sure you properly store backup codes provided later in the setup process.

Step 2: Login

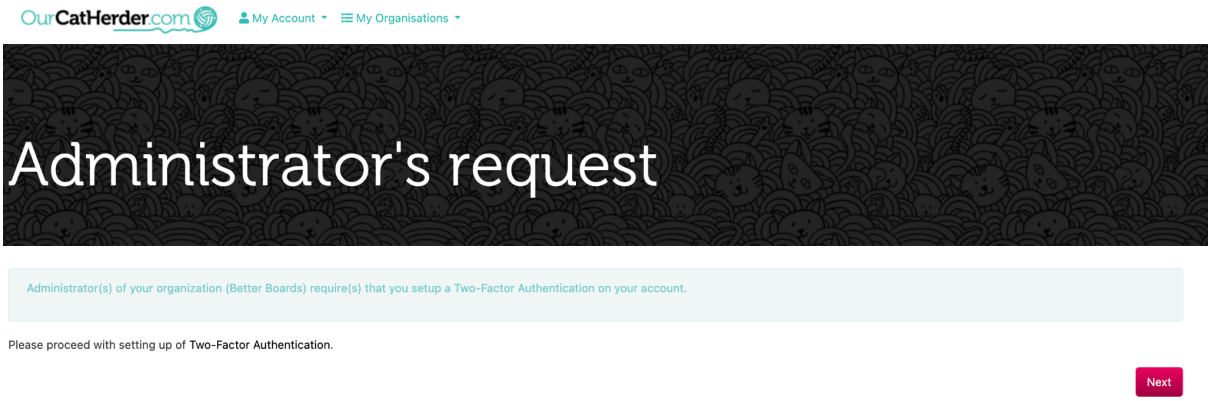
Head to https://ourcatherder.com/users/login and login to your Our Cat Herder account.

2FA Enforced by Administrator

If you are on a portal where 2FA has been enforced by an Administrator then instead of **Step 3** and **Step 4** you will see the below “Administrators Request” screen.

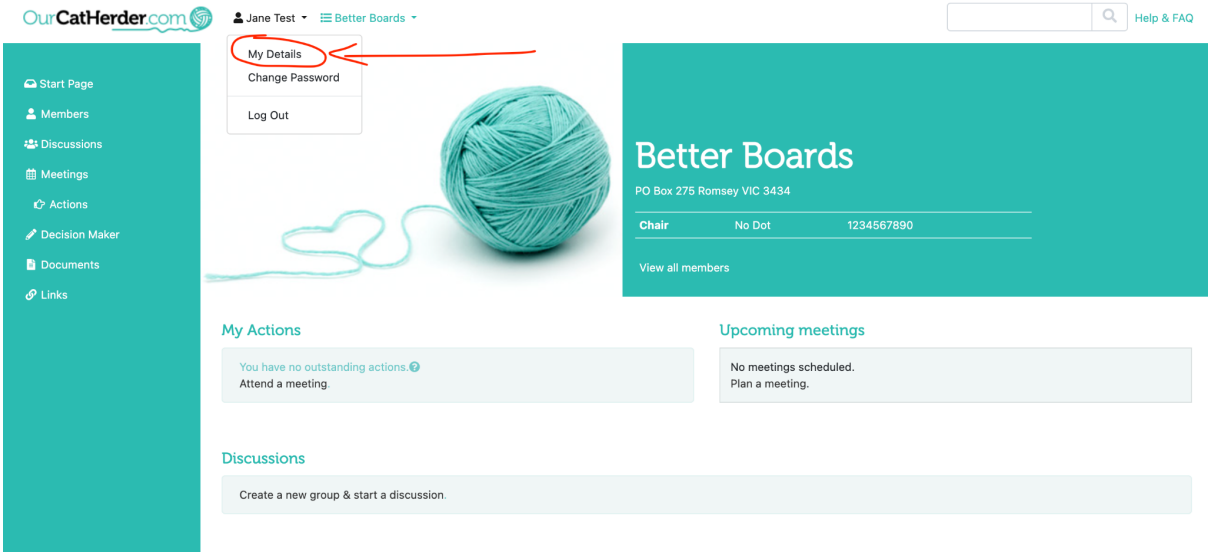
Clicking “Next” in this view will take you directly to **Step 5** in this document.

If you are setting up 2FA without the portal admin enforcing it then just follow all steps below sequentially from Step 3.



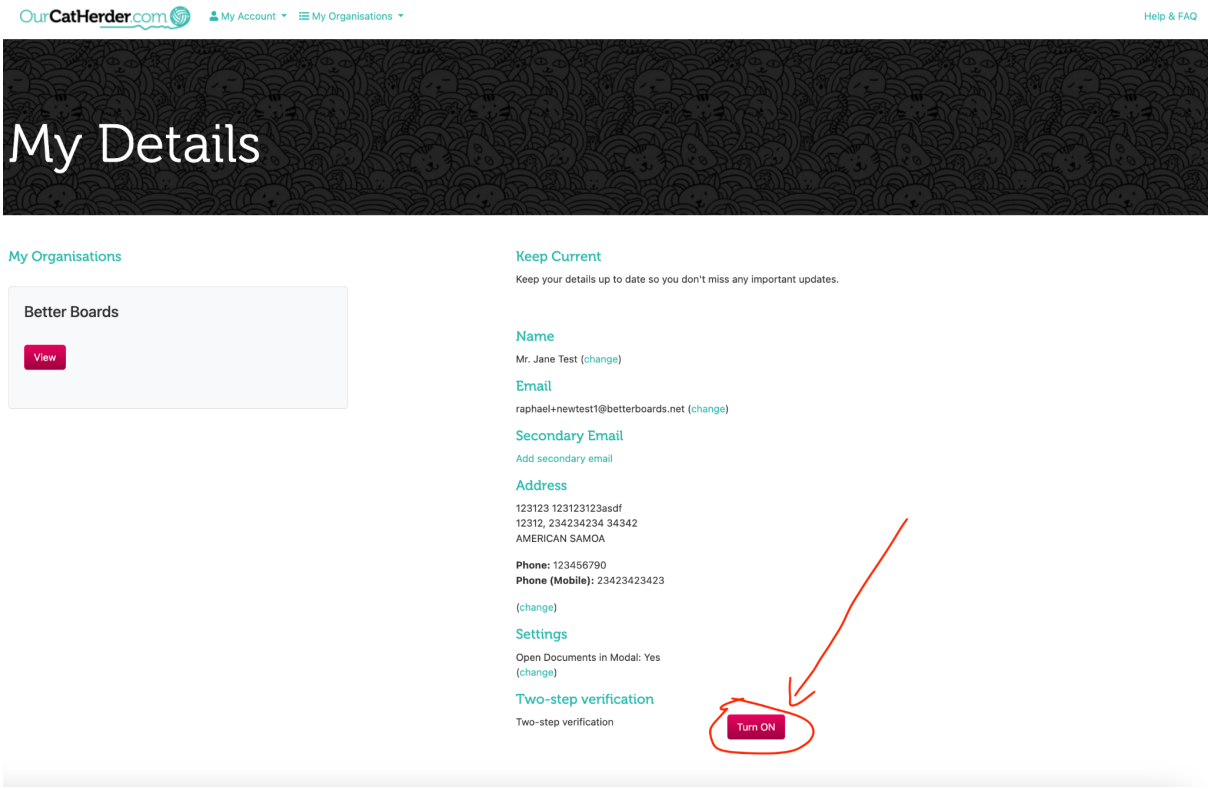
Step 3: Navigate to My Details Page

In some cases you might login and be sent directly to your “My Details” page. But if you are not then click your name in the top menu and in the drop down select “My Details”



Step 4: Start 2FA Activation process

On your “My Details” page scroll to the bottom of the page and click “Turn On” under the two-step verification item.

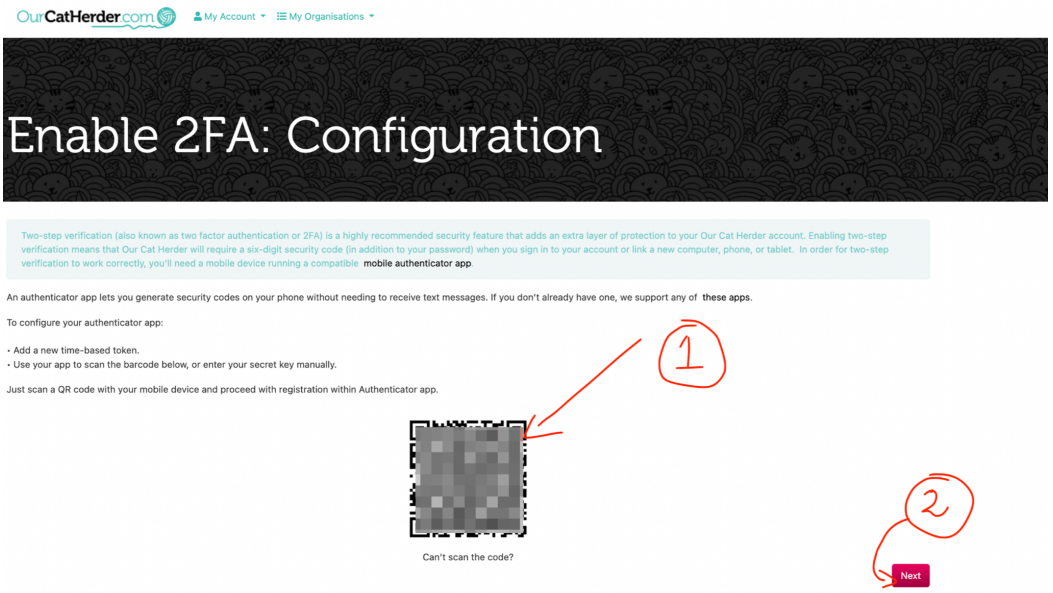


Step 5: Configuration

1. Open the Authenticator App installed earlier and scan the QR code (*note: some devices allow you to scan straight from the camera, we recommend doing it directly from the Authentication app of your choice as it is more reliable*).

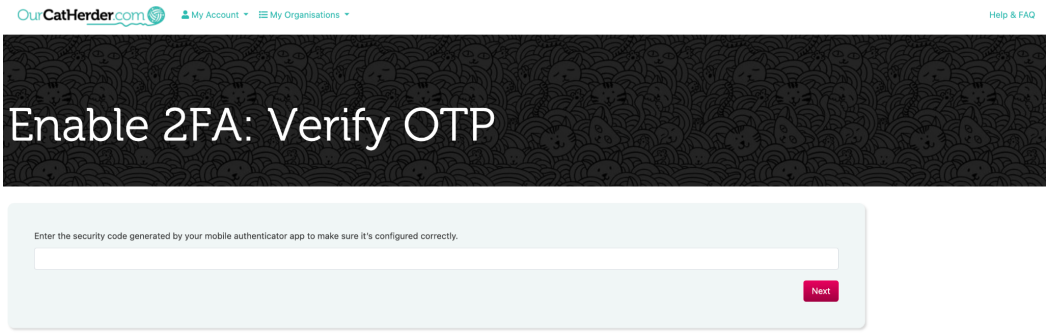
   Alternatively click “can’t scan the code” and it will provide a string of numbers for you to type into your Authenticator App instead.

   Once this is done then the Authenticator App should start producing strings of six digits numbers for you to input into Our Cat Herder



2. Click the next button which will take you to the next page, Verify OTP, where you need to enter the current **six digit code** from the Authenticator App (just the numbers as a single string eg 123456 not with spaces OR dashes).

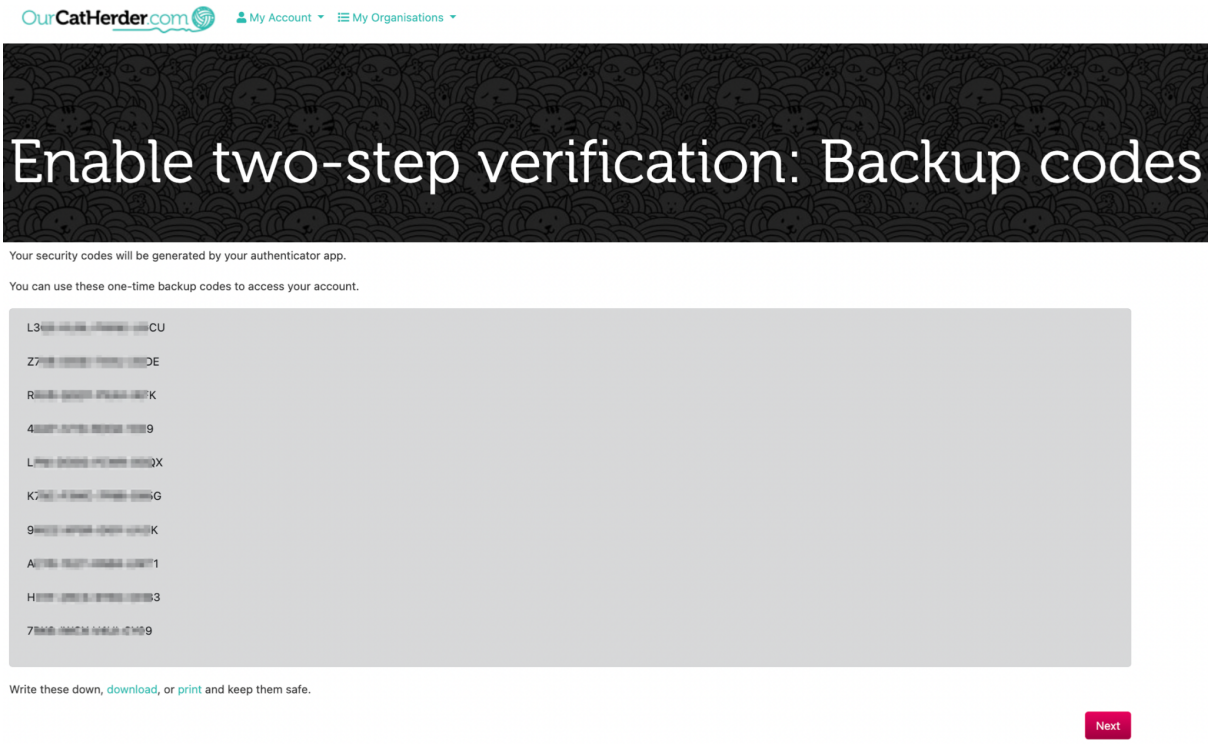
   This verifies that the codes from your Authenticator App are recognised by Our Cat Herder. Enter the current **six digit code** from your Authenticator App in the box shown and click “Next”



Step 6: Backup Codes

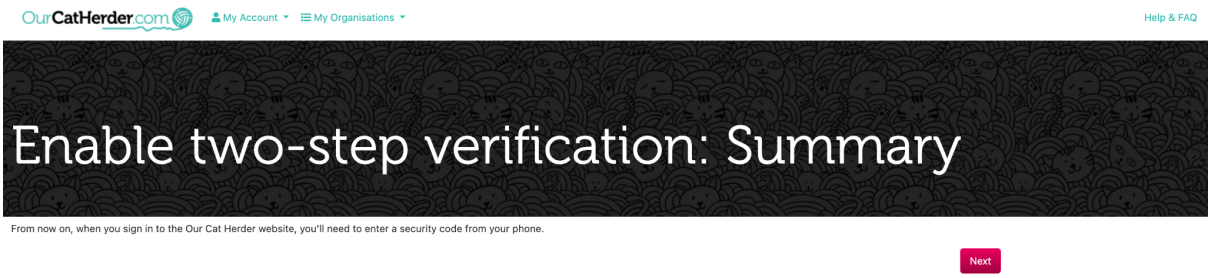
This is an important step. Write down, copy, print or save the list of 16 digit backup codes somewhere secure.

These codes are to be used if you lose your device, erase it or other situation where you cannot use the six digit codes generated by your Authenticator App. Once saved somewhere safe then click “Next”.

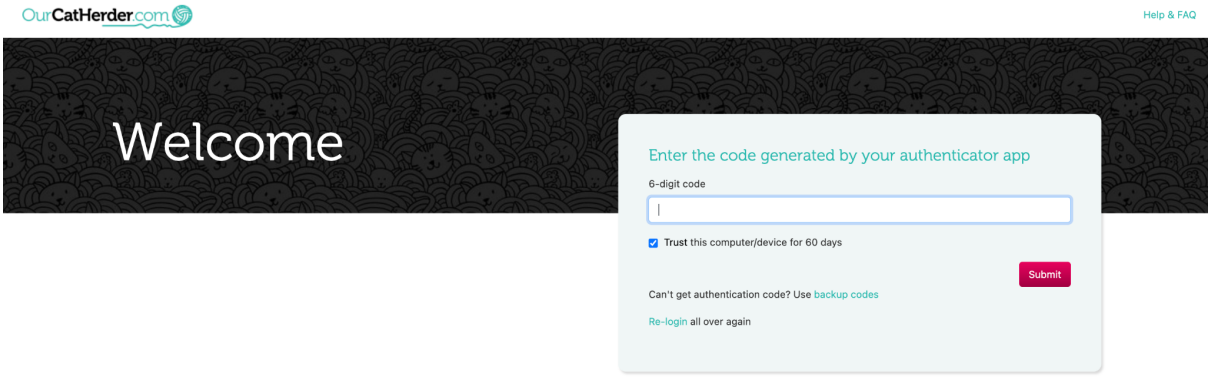


Step 7: Confirm.

The next page simply confirms the action you have taken. **However it is important you finish the process by clicking the "Next" button on this page.**



Once you click next on the "Summary" page you will be logged out of your account and asked to re-login. Once you login again with your you should see a screen like the below:



Now enter one of the six digit codes from your Authenticator App (do not include spaces or dashes, just the numbers eg: 123456).

You can also check the box to ask your current device to be remembered by Our Cat Herder (this will mean you don't have to enter a code again for a while). However it only remembers for up to 60 days or until something about your device changes (such as OS or Ip Address), after that you'll be asked to use another six digit code during the login process.

Notes

The 16 digit Backup Codes from earlier are not for everyday use they are for only if for some reason you don't have a way to access the Authenticator App on your device (device is lost, erased etc…)

Please contact support@ourcatherder.com with any questions about this process.