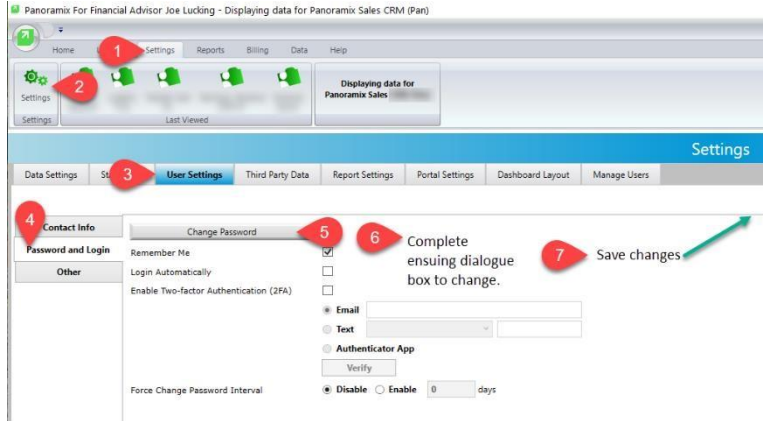


Password Management

How do I change my password?



1. Click the **Setting Tab**
2. If necessary, click the **SETTINGS** icon on the ribbon
3. Click the **User Settings** tab
4. Select the **Password and Login** tab
5. Click the **change password** button
6. Enter your “old password” (i.e. your current password) and your “new password” (i.e. the password you would like to use going forward) twice (once in each text box)
7. click **save**.

Does Panoramix support two-factor authentication (2FA)?

Two-factor Authentication (2FA) requires that you enter a code sent to you via email, SMS text message, or to your phone app in addition to your username and password before you may access Panoramix. It is an added level of security protection to prevent unauthorized access to your data. Yes, Panoramix supports 2FA.

How do I set up 2FA?

To enable 2FA

- Go to **Settings, User Settings**, (see image above)
- Select **Enable 2FA**
- Select the notification method for your code, email, SMS text, or phone app • If SMS text, select your carrier
- Click **Verify** to complete next steps

See image below.

Change Password

Remember Me ☒

Login Automatically ☐

Enable Two-factor Authentication (2FA) ☒

☐ Email

☐ Text Xfinity (Comcast)

☒ Authenticator App

Verify

- Alltel Wireless
- AT&T Mobility (formerly Cingular)
- AT&T Wireless
- Boost Mobile
- Cricket
- Metro PCS
- Sprint (Nextel)
- Sprint (PCS)
- Straight Talk
- T-Mobile
- U.S. Cellular
- Verizon
- Virgin Mobile
- Xfinity (Comcast)

Select Enable 2FA.

Select the notification method for your code, email, SMS text, or phone app. If SMS text, select your carrier.

Click Verify to complete next steps.

The list of carriers available for SMS text notification appears to the left.

To Verify

Enabling 2FA requires that user verify it before saving. Click **verify** to begin. The ensuing screen is slightly different based on the 2FA type selected.

In case of email and SMS text, click on **send code** in order to send code to the specified email/phone number. Enter the verification code and click **save**. In case of auth app, use the QR code (individualized code per user, generated to add Panoramix option to the authenticator app. Enter the verification code displayed by the app, and click **save**.

Email

Verify Two-factor Authentication

Verify Two-factor Authentication

This will verify that your email is setup correctly and your email address (" [redacted] ") is ready to receive verification emails.

Send Code 1

Enter code below: 3

Two-factor Authentication

Verification code was sent to " [redacted] ". Please enter it in the box below.

OK 2

Save Cancel 4

Text

Verify Two-factor Authentication

This will verify that your phone number (" [redacted] ") is ready to receive verification messages.

Send Code 1

Enter code below: 3

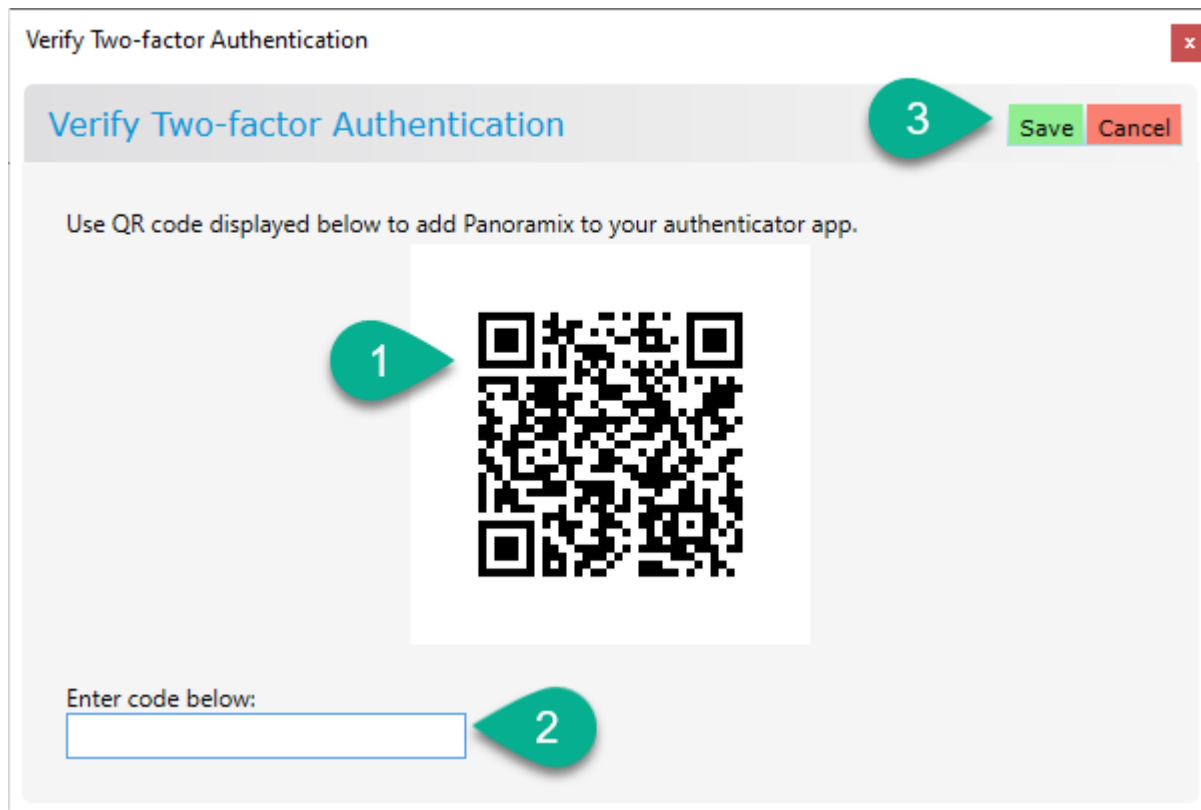
Two-factor Authentication

Verification code was sent to " [redacted] ". Please enter it in the box below.

OK 2

Save Cancel 4

Authenticator App



Verify Two-factor Authentication

Verify Two-factor Authentication

Use QR code displayed below to add Panoramix to your authenticator app.

1



2

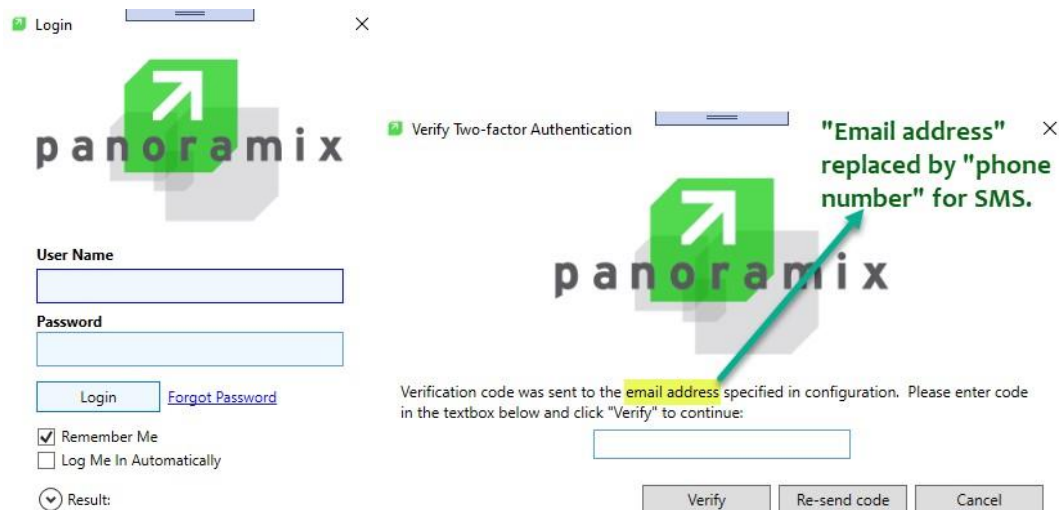
Enter code below:

3

Save Cancel

How do I then use 2FA?

Log in as you normally do with username and password. Once 2FA enabled, three options as shown in the following images.



Login

panoramix

User Name

Password

Login [Forgot Password](#)

☒ Remember Me
☐ Log Me In Automatically

Result:

Verify Two-factor Authentication

panoramix

"Email address" replaced by "phone number" for SMS.

Verification code was sent to the email address specified in configuration. Please enter code in the textbox below and click "Verify" to continue:

Verify Re-send code Cancel

Since your phone's Authenticator App generates a new code periodically, there is no need for a "resend code" button. Therefore, the screen looks as follows.



Verify Two-factor Authentication

panoramix

Please enter code generated in your authentication app in the textbox below and click "Verify" to continue:

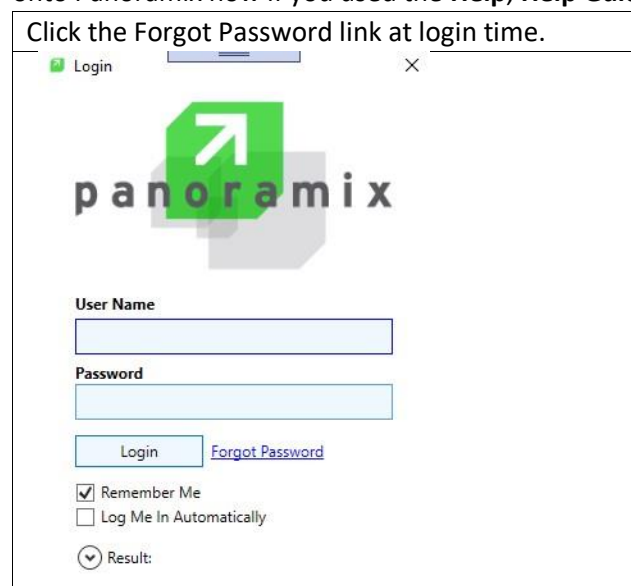
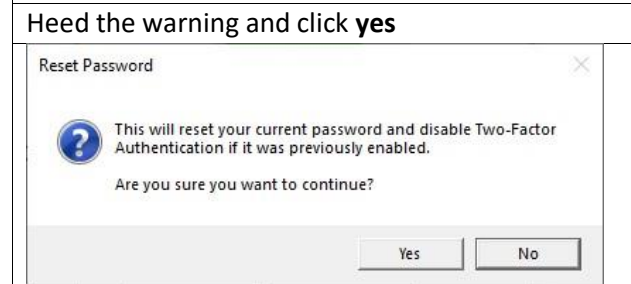
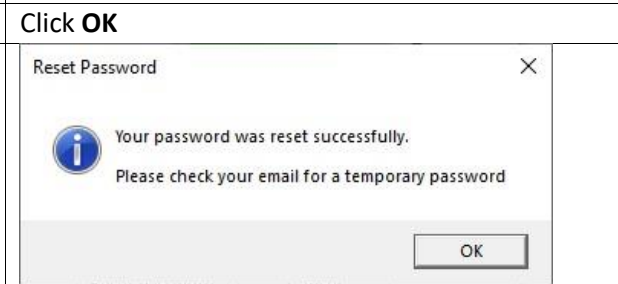
Verify Cancel

Wait, why do I have to pick my phone carrier for SMS text 2FA?

Panoramix makes you pick your own services carrier because a Panoramix license only costs \$5k per year for all your users. Yes, there are subscription services available that will figure out what carrier a phone number belongs to, but we honestly don't expect a lot of use of this option and we would have to raise our price to \$7k or \$8k a year to cover just that subscription service. So, pick your own carrier and save a bundle of cash.

What if I forget my password?

Either you are reading the entire FAQ for your own edification, for which I say thank you and congratulations, or you're checking this for a coworker who is locked out, in which case good on you for helping an knowing where to look. Otherwise, I'm not sure how you got here, since you must be logged onto Panoramix now if you used the **Help, Help Guides** selection to get to this document.

Click the Forgot Password link at login time.  Login panoramix User Name Password Login Forgot Password ☒ Remember Me ☐ Log Me In Automatically Result:	Enter your username and click reset password  Reset Password panoramix User Name Reset Password Cancel
Heed the warning and click yes  Reset Password ? This will reset your current password and disable Two-Factor Authentication if it was previously enabled. Are you sure you want to continue? Yes No	Click OK  Reset Password i Your password was reset successfully. Please check your email for a temporary password OK

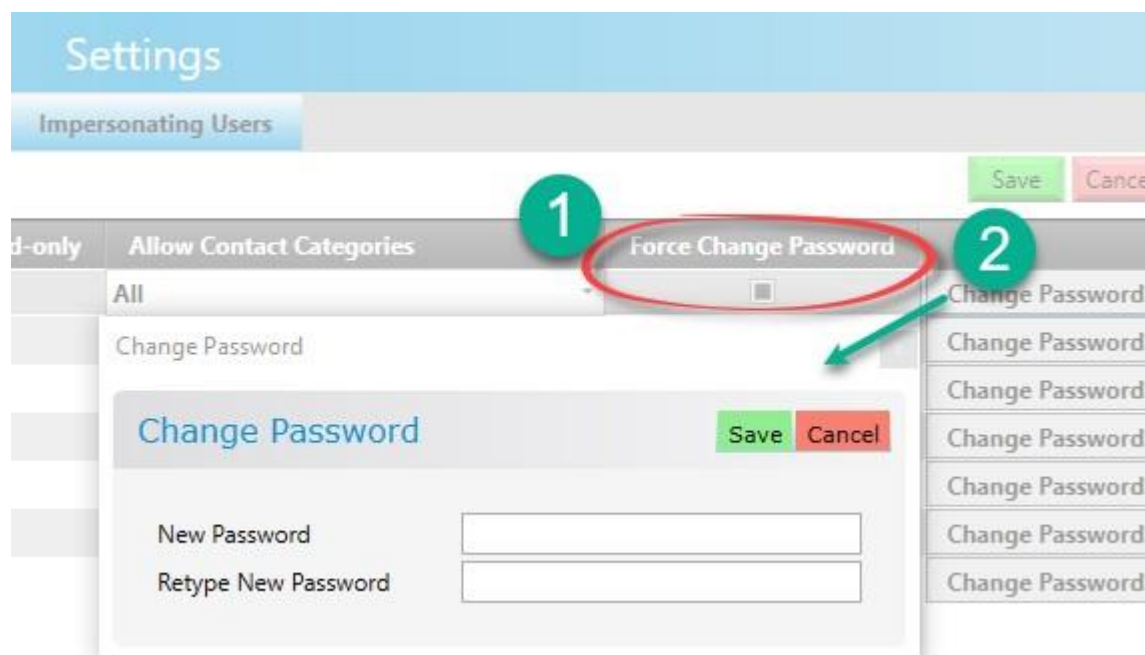
Return to login. Use temporary password	Change password Expired password Change Password Save Cancel Your password has expired. You must change it before logging in to Panoramix. Old Password New Password Retype New Password
Return to login. Use new password.	

NOTE: if the email address in Panoramix is invalid, you will need to contact support at 877-595-3282, option 3 for a reset.

How do I force password changes for my advisory?

Under settings, see immediately previous, if you have access to the **Impersonating Users** tab, you will see two elements related to managing your advisory's list of passwords. One is a check box that allows you to force change a password the next time the advisor logs in, and the other is a **change password** button that lets you set the value if the advisor has forgotten their password.

Remember to **save** changes. See below.



1 #1 = The force change password checkbox; #2 = the change password button and subsequent dialogue box.