Two Factor Authentication (2FA)

EPM Connect Guide

Document Control

Document Overview: This document outlines the step-by-step process for enabling two factor authentication.

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Document Approval
The Director of Operational Excellence shall review this guide annually and shall determine whether any further changes need to be made prior to approval.

This document was approved by Keren Prior, Director of Operational Excellence on 26th October 2026 and is issued on a version-controlled basis under her signature.

Document History

Date of Change	26th October 2026
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New Version Number	2.0
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Overview

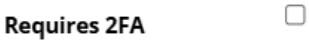
2 Factor Authentication requires set up by the Trust/School in **Main Settings** but can also be set up by your Employees on an individual basis.

Option 1: School/Trust Enablement

Trust Wide Enablement

If you wish for all Schools within your Trust to require 2FA, please follow this section of the guide.

1. From the left-hand side of the system, select **Trust Overview.** A list of further options is displayed.
2. Select **MAT Admin**. A list of further options is displayed
3. Select **Main Settings**.
4. Under **MAT Details**, there is a tick box labelled **Requires 2FA.**



5. Tick the **Requires 2FA** box.



6. Click **Save**.

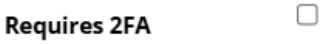


2 Factor Authentication will now be switched on for all employees across the Trust; they will be required to input a code each time they login. This code will be emailed to their User Email.

School Enablement

If you wish to enable 2FA for individual Schools, please follow this section of the guide.

1. From the bottom of the left-hand side of the system, select **Admin.** A list of further options is displayed.
2. Select **Main Settings**.
3. Under **Property Details,** there is a tick box labelled **Requires 2FA.**



4. Tick the **Requires 2FA** box.



5. Click **Save.**

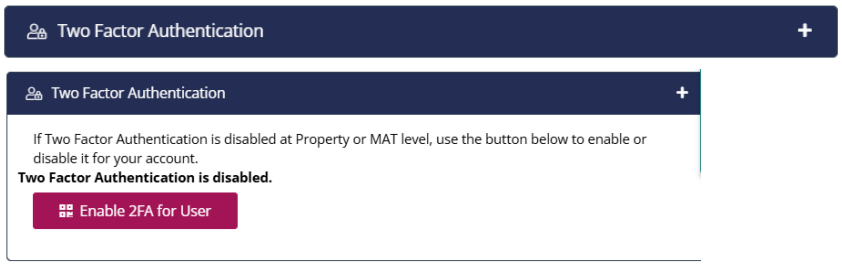


2 Factor Authentication will now be switched on for all employees across the school; they will be required to input a code each time they login. This code will be emailed to their User Email.

Option 2: Employee Enablement

If you do not require 2FA for the whole Trust/School, individuals can enable 2 factor authentication for themselves via **My Account**, in **My Portal**. If you require a specific set of Employees to enable this, we recommend setting a task for those employees to set up 2FA. Please see the Task Management Guide for details of how to set up tasks.

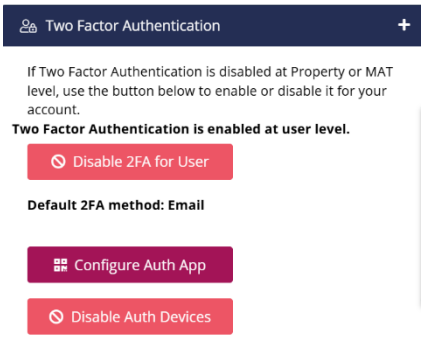
1. From the left-hand side of the system, click on **My Portal**. A list of further options is displayed.
2. Select **My Account**. Your **Account** page is then displayed.
3. Click the plus sign to open the **Two Factor Authentication** expansion tab.



4. Once expanded, click **Enable 2FA for User.**



5. The page will reload.



You have now enabled two factor authentication for your account. A **Saved Successfully** message is displayed.