

Xplan Two Factor Authentication (2FA) Report

User Gi V1.0

AMP Limited ABN 49 079 354 519

1. Introduction

Running this report in Xplan will provide practices with an overview of their users Two Factor Authentication (2FA) status.

2. How to run the user report

In the top right hand corner of the screen place your cursor into the search box.

Click on Users and hit Enter on your keyboard

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°2°	Main	Insurance News Social ent Clients				Clients Users Suppliers Professionals Referrers
Ē	•	Client Name ClientA_PVTFeb17R6A				Recent users Practice3, AMP User
44 \$\$	*	testing.pvt_28thFeb_Primary Test, Client_24th_May				Practice1, AMPUser
	*	Partner, Maddy Example, Test				
	*	mate, John (J) Client, John				

A list of users for the practice will load.

Navigate to the cog wheel in the left-hand panel and click on **Reports > Merge Report**

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°.9°.	🖵 Quick nav (\) Q							PDF
8 7	< Admin Users Search ^ Criteria Result	Search Filter Group Access Level Status	AMP HO - Der Include sub-g All Levels All Status	no Praeti Iroups V	~			0
\$\$	Load Reports Merge report Management report Recurring management report Custom management report	Search Result	: (1 to 3 of 3) ice1, AMPUser	User Id axauser.practice1	Access Level H CF IPS RR WSSP XT XT	Phone +	Email ats@amp.com.au	(Constant) (Constant)
		 Pract Pract 	ctice2, <u>AMP User</u> ice3, AMP User	axauser.practice2 axauser.practice3	H CF IPS H CF		zzzaxademo@axa.com.ai	11/02/2021 2:07:41 p u 17/01/2023 4:04:15 p

Select the category Xplan User Reports from the drop down menu. Click on the arrow next to the report

°. 2°,	Quick nav (\)	Select Merge Template							
8	< Admin Users	Target Clients: All Listed Users Report Category: Xplan User Reports	~						
ŧ	Search ~	Action Name	Туре	Description					
88	Reports ^	Xplan 2FA check	Entity List						
44	Merge report	Xplan User Access Level Details	Entity List	Summary of practice users and current charges					

Click Execute

The report will now start generating and when it is ready for download it will be available in the notification bell at the top of the screen. Click on the **notification bell** and download the report

			AMP Advice Technology Support 🗸	+ Q Search users (/)
Quick nav (\)				Edit Template Execute
	Select Template Files			
Report Setup ~	Select the template files that you wish to inclu	le/exclude during a report merge.		
Select Fields	 Selected template files will be concate There must be at least one template file 	hated to form one single output file. selected for merge.		
Options	Name Name	Description		
	Xplan 2FA check report.xlsx			
AMP Xplan - Work - Micros	oft Edge $\downarrow_{\!\!\!\Delta}$ — \Box $ imes$			
https://amp.xplan.ir	ess.com.au/home/user A 🍳			
Sender: AMP Advice Technology Support Received: 14/02/023 45552 pm Subject X/abu 27A nexk Merge Report Ress The merge report requested to be generation ownloaded. Template: Xplan 2FA check Generation Time: 0.128 sec	Action Close ut ed at 14/02/2023 4:55.52 pm is now ready to be Download Report	-		

Open the Excel file and click on "Enable Editing"

PROTECTED VIEW This file has been verified by Microsoft Defender Advanced Threat Protection and it hasn't detected any threats. If you need to edit this file, click enable editing.								
A B	C	D	E	F	G	н		
User Name	User Access Level	2FA Activated	2FA Activation Date	2FA Device Type				
2 Advice Technology Support, AMP	AMP Financial Planning Tools Support							
3 Practice1, AMPUser	H CF IPS RR WSSP XT XT+							
4 - Practice2, AMP User	H CF IPS							
5								

After you have clicked on enable editing the user details will populate into the report

A	В	C	D	E	F
plan Entity ID	User Name	User Access Level	2FA Activated	2FA Activation Date	2FA Device Type
266765	Advice Technology Support, AMP	AMP Financial Planning Tools Support			
13922	Practice1, AMPUser	H CF IPS RR WSSP XT XT+			
20075	- Practice2, AMP User	H CF IPS			
2 1 2	olan Entity ID 66765 3922 0075	Institution User Name 06765 Advice Technology Support, AMP 3922 Practice1, AMPUser 0075 - Practice2, AMP User	Dan Entity ID User Name User Access Level 66765 Advice Technology Support, AMP AMP Financial Planning Tools Support 3922 Practice1, AMPUser H CF IPS RR WSSP XT XT+ 0075 - Practice2, AMP User H CF IPS	Dan Entity ID User Name User Access Level 2FA Activated 66765 Advice Technology Support, AMP AMP Financial Planning Tools Support 3922 Practice1, AMPUser H CF IPS RR WSSP XT XT+ 10075 O075 - Practice2, AMP User H CF IPS	Dan Entity ID User Name User Access Level 2FA Activated 2FA Activated 66765 Advice Technology Support, AMP AMP Financial Planning Tools Support 4 3922 Practice1, AMPUser H CF IPS RR WSSP XT XT+ 4 0075 - Practice2, AMP User H CF IPS