How to Sign Onto Octane
Cardinal Financial Company - Wholesale

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Section 1: Signing Into Octane

Supported Browsers
The supported browsers for using Octane are:
- Chrome (recommended and used by Cardinal Financial) Firefox
- Apple Safari Microsoft Internet Explorer- Octane requires version 10 or higher
  *If you use an Apple Mac computer, do the following to ensure correct tabbing behavior in Octane:
- On your Mac Go To > System Preferences
- Select > Keyboard
- Select > Shortcuts
- Full Keyboard Access > Select > All Controls

Note: To sign in, the Account Administrator must have already created and configured a user account for you and your account status must be Active.

How To Sign In
- With a Remote location first complete the Remote Access steps below.
- Go to the Octane Sign In page https://octane.cardinalfinancial.com
- If you click on > Sign In link and receive an "Unauthorized Access" message your location has not been authorized for Octane access and you will have to request remote access.
- If you are working from a non-office site you must follow the instructions for Remote Access.

UNAUTHORIZED ACCESS

Your current location is not authorized to use this application.
If you have permission for remote access, review your account activation email for instructions or the Sign On information in the Octane Guide.
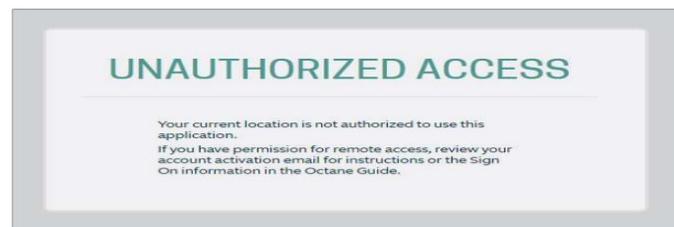
- If working from an authorized location, you will get the Login page (requesting remote access will not be required).

WELCOME TO OCTANE

Username

Password

Forgot your password?   **Sign In**

- Enter your username(first.last names) and password.
  - *Note:* Your user name is **_NOT_** your email address.
- Click Sign In or press Enter.
- You will receive a text message or use Google Authenticator to receive your two step verification code. Input this code into Octane.

Section 2: Two Step Verification

During your account activation, you will be required to add a mobile phone which can be used for 2-Step verification via a text message.You can also add a backup phone in case your primary phone is inaccessible. Click on your name in the top right corner of Octane select general then click on "Change Mobile Phone" on the bottom right to add a back up number.
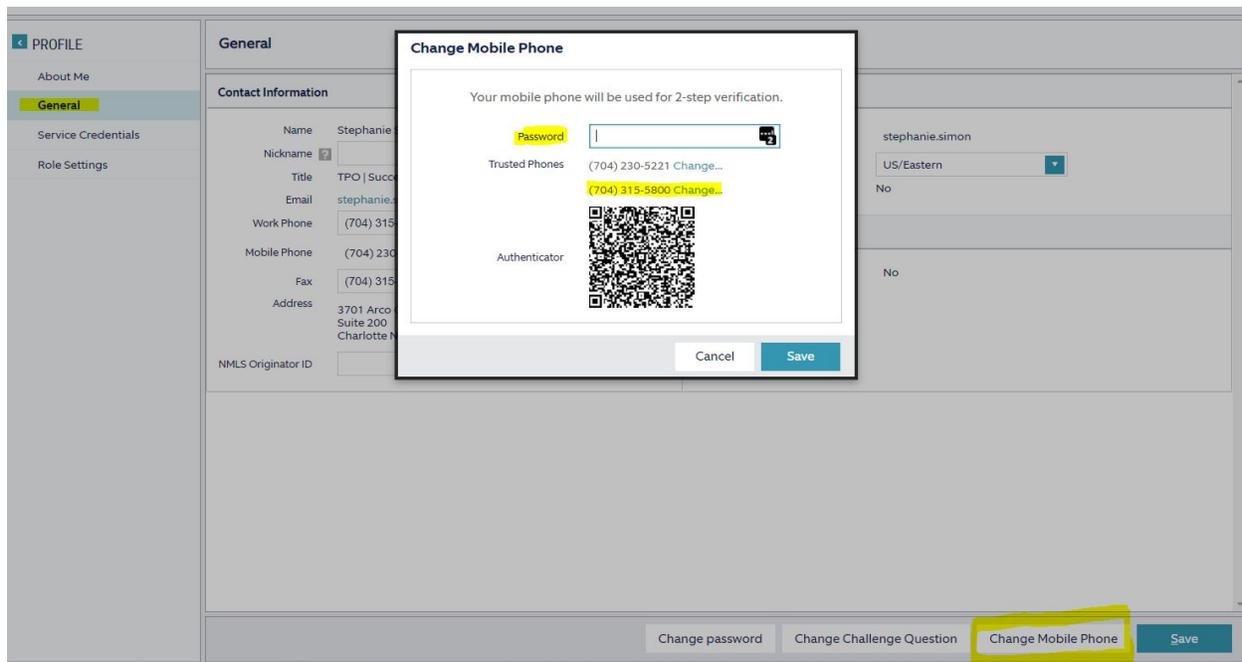
After signing in with your username and password, you will be sent a code via SMS to your configured phone and asked to enter it on screen before completing the sign in process.
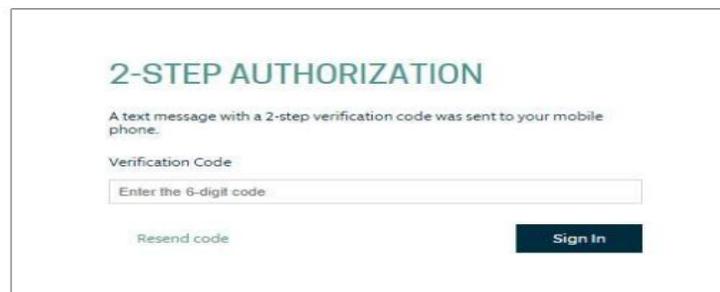
Note*: that once you complete activation, you can also configure your account to use Google Authenticator instead of text message for 2-step verification.*

Setting up Google Authenticator

- Download the "Google Authenticator" Application on your smartphone.
- Select the Change Mobile Phone button from the Profile screen and click the general tab located on the right side of your screen (same location as backup number).
- In that dialog**,** ignore the Password and Add Backup Phone fields.
- You will see a QR code labeled **Authenticator**. (See the screenshot from Change Mobile Phone above) Open the Google Authenticator app on your phone.
  Click the "+" button and choose Scan Barcode.
- Point your phone camera at the screen so that the QR code shows on the screen. It will automatically detect the code and complete making the entry. You should now see CardinalFinancial:<yourusername> in addition to other accounts added to your Google Authenticator account. *You can now click Cancel on the Octane Change Mobile Phone dialog to close it. You do not need to enter your password or click save.*
- From now on, you have the option to use google authenticator but you will still receive a text with the two-step verification code.

Section 3: Remote access

Some employees are authorized to work from a non-office site. If you are authorized, you must activate your remote location before you can sign-in to Octane from it.

- If you do not sign on from your active location for **5 days**, the location will be deactivated and you must re-activate.
- *Y*ou can only have one activated location at a time. If you make a remote access request from a different location, your previous access location will be deactivated even if it is within the **30 day activation period**. For example, if you work from home, then travel to a hotel and activate the hotel location, when you return home, you will have to reactivate your remote request from your home.
- You cannot make a remote access request from a company office. Connections from company offices are managed centrally

Activating a remote location:

- You can only request activation of a remote location if your Octane user account has been set to allow it. This must be done by Octane administrators**.**
- From the location from which you want to access Octane (e.g. your home) go to the Remote Access Request page**:** https://online.cardinalfinancial.com/#/remote-request
- You will see the Octane Remote Access request screen**:**

- Enter your Octane username and click the Request button.
- Octane will send an email to your Octane user email account. Check spam if not in your inbox.
- If your request was not accepted, the email will explain why.
- If your request was accepted, the email will contain a link to activate your location. The link is only valid for 15 minutes.
- Click the activation link in the email.
- If the remote access activation is successful and the user has been activated, the user can go to the Octane sign in page and use the application.

Octane Remote Access

Octane remote access activated. You can now go to the Octane sign in page and use the application.

Octane Remote Access

Octane remote access denied. If you reached this page using a confirmation link sent to you in an email, the link may have expired. To submit a new request, click Re-Request.

Re-Request
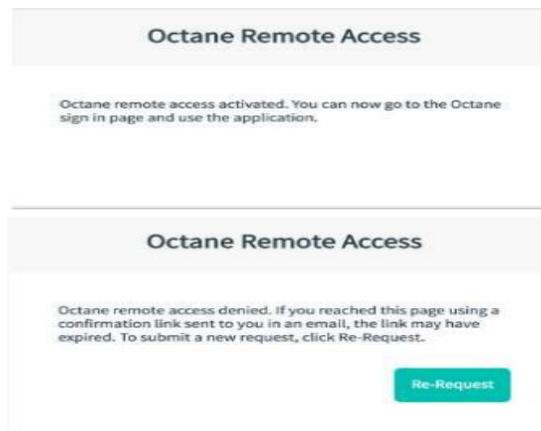
- If the remote access activation is successful and the user has not been activated, the user can return to the account activation email and proceed with the activation step
- If you don't see one of the screens above, it is likely due to an expired link. Re-try the process.

References

Reference List
Octane
Remote Access

Revision History

Date	Description	Approver
9.29.20	Initial Release	Timothy Williams