

Conventions & Requirements

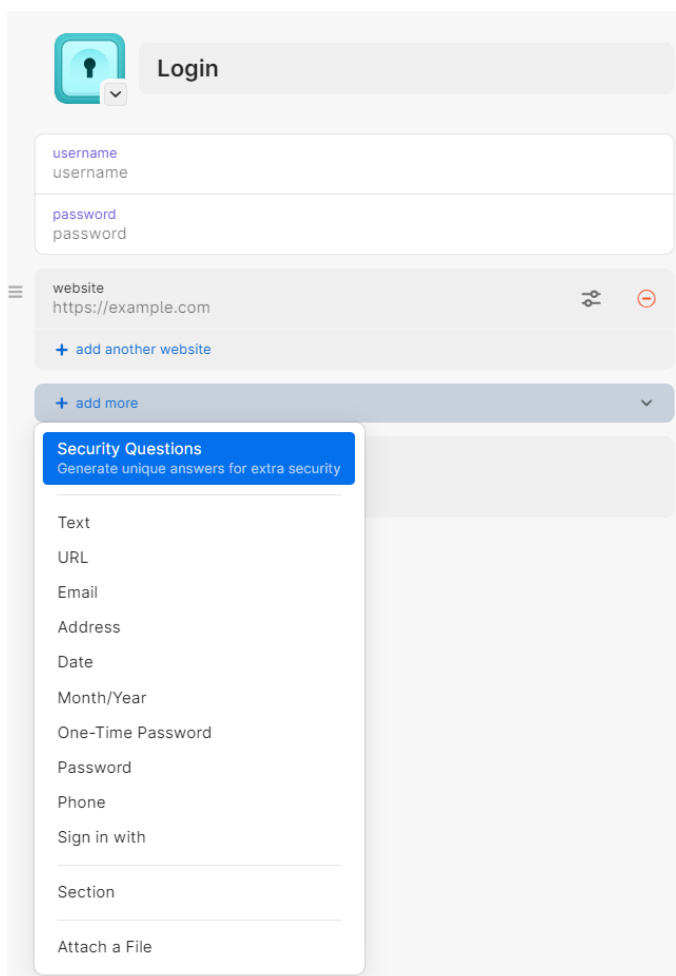
Separate Logins for Each Site

Each site/username/password combo should be a separate login. This allows autofill to work correctly display and autofill the logon details when searched/presented. Ex. BlackRock.

Security Questions

When adding security questions information to a logon, ensure this information is added to the *Security Question* field and not a generic *text* or *notes* field. This will allow autofill to correctly locate and autofill the information when its requested.

To add a *Security Question* field to a logon, select add more and choose **Security Question** from the drop-down.



The image shows a user interface for managing logins. At the top is a 'Login' button with a key icon. Below it are two input fields labeled 'username' and 'password'. Further down is a 'website' field containing 'https://example.com' with a '+ add another website' link. Below the website field is a '+ add more' button with a dropdown arrow. This dropdown menu is open, showing a list of options: 'Security Questions' (highlighted in blue with the subtitle 'Generate unique answers for extra security'), 'Text', 'URL', 'Email', 'Address', 'Date', 'Month/Year', 'One-Time Password', 'Password', 'Phone', 'Sign in with', 'Section', and 'Attach a File'.

Tagging

When adding tags to a logon entry, **always** use the client billing codes for the tags.

- Sub-codes/suffixes are currently excluded (hyphenated billing codes only in use where the hyphenation is for a SEPARATE client).

Login Items with Multiple Data Room/Managers

When creating login items that have multiple data rooms and/or managers:

- Tag with CLIENT manager names (manager tags not needed otherwise). i.e., manager tags should only be used for items with multiple managers for ease of searchability.
 - Sometimes data room access is granted when we're doing a search. These managers/funds should not be tagged; just include a tag for the client for which the search is being conducted.
 - myMAWER is Mawer's proprietary/dedicated site and contains Mawer in the title, so a "Mawer" tag need not be included.
- Create new Section = Data Room, Text "title" = Fund/Manager name, Text = client billing codes.

Multi-Factor Authentication

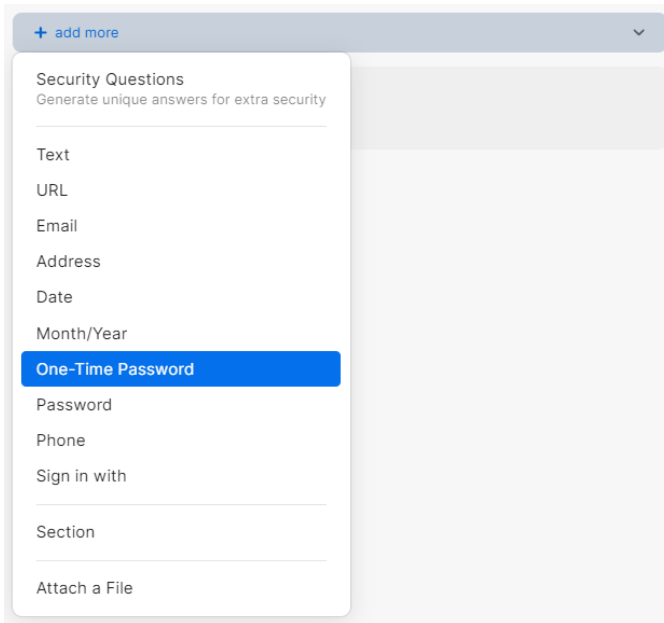
It's preferred that whenever possible the built-in 1Password MFA authentication mechanism be used for storing and reading MFA codes. If not available, configure MFA to email investmentreports@georgeandbell.com.

As a last resort, use your personal Duo, Microsoft Authentication apps or SMS. These options are not preferable as it does not allow anyone else to logon to the account without your device.

To add a MFA code onto a 1Password logon item, please:

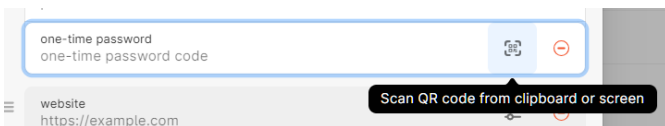
1. Choose the logon item you'd like to add the MFA code to.
2. Select **Edit** within the top right-hand corner to edit the item.

3. Select **add more** and choose **One-Time Password**.



4. Select the little square symbol to have the QR code scanned from the screen.

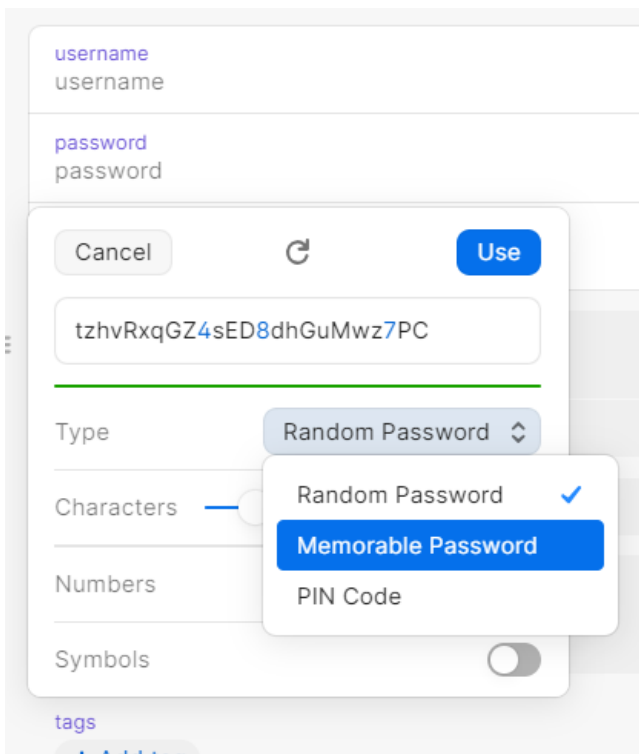
If not working, many sites allow you to copy/paste the code directly into the field.



Password Creation

By default 1Password uses their *Smart Password* generator, which generates a password as a random series of characters. This is the preferred option, however at times may not meet the password requirements of the site or it may be preferable to have a password that's memorable. To change how 1Password generates the password:

1. Under the logon item you're editing/creating select the password field.
2. 1Password should automatically prompt to **Create a New Password**. Select this option.
3. In the resulting drop-down update **Type** to you're preferred password generating mechanism.



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