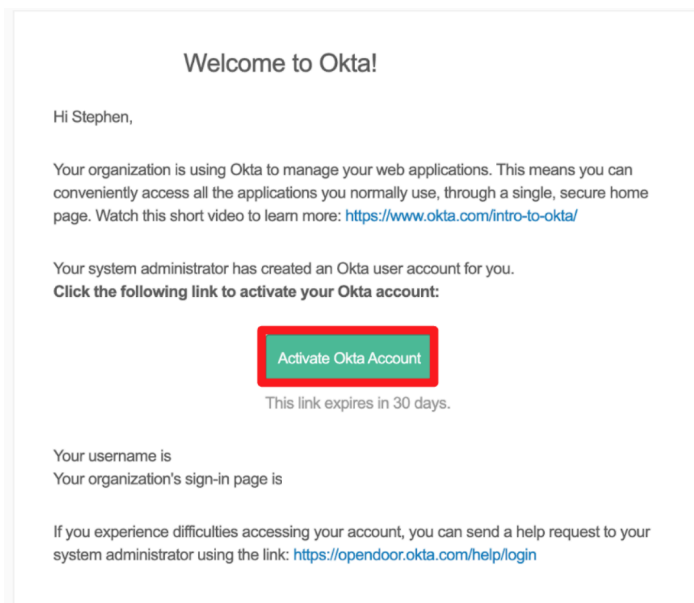# Technology and Account Setup

This guide provides a written version of the Technology Setup section of our New Employee Orientation. Use these steps to set up your Okta account, set up your equipment, and learn how to get help from IT.

Note: *This document was created for demonstration purposes only. Some links are placeholders, and may not point to the expected website or destination.*

Step 1: Okta Password Setup

Okta is a Single Sign On (SSO) tool that enables the business to grant you access to multiple apps and services using only one username and password. We've already generated an account for you ahead of your first day, so follow these steps to complete your account registration.
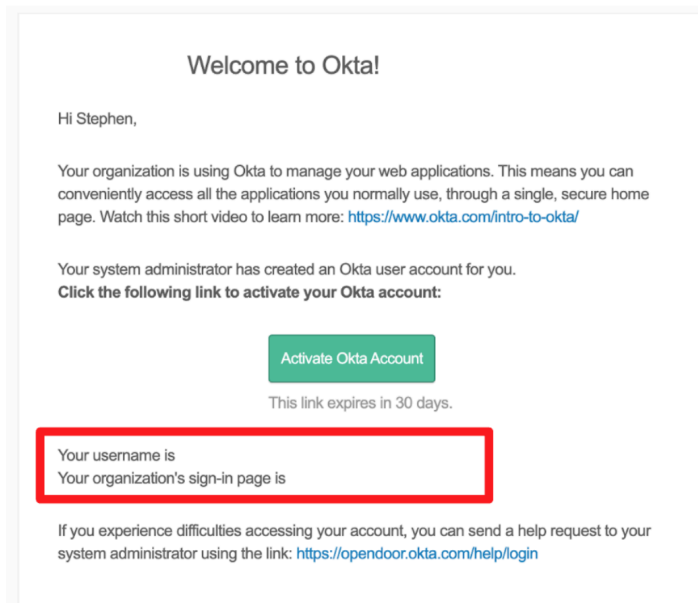
1. A "**Welcome to Okta" invitation email** is sent to every new hire in the early morning hours of their first day. Locate this in your personal email and click on the **Activate Okta Account** button.

(This button is one-time-use only; if you see a "Token Expired" message, reach out to IT

using one of the methods outlined in the Notes and FAQ section below.)

Note: The invitation email includes the username that the system pre-set for you, as well as a direct URL to the business's Okta Login page.

2. The account creation page will prompt you to **set up a password and your security questions**. This password cannot contain your first or last name, and must be 14 or more characters long.

If you cannot proceed past this step, double check that the password you are using

meets the requirements (outlined above and on the password setup screen).

3. Once your password and security questions are successfully set up, you should see a prompt walking you through how to download and **set up an app called Okta Verify**.

Step 2: Okta Verify Configuration

Okta Verify is the official [multi-factor authenticator](#) app for Okta. We use this app as an added layer of security whenever you sign into your account. When set up correctly, the app will display a notification that allows you to verify your identity with one tap, or will provide you with a code.

1. Directly following the password setup screen, you should see a **multi-factor authentication setup** screen.

   If you don't see this screen, or if you closed out of the password setup screen, navigate to [company.okta.com](#) on a personal device (preferably a laptop or tablet; **not** your phone), and sign in with your Okta credentials (remember: your username is in your invite email, and the password is the one we set up in the previous section).

Click on the **Configure factor** button.

Set up multifactor authentication

Your company requires multifactor
authentication to add an additional layer of
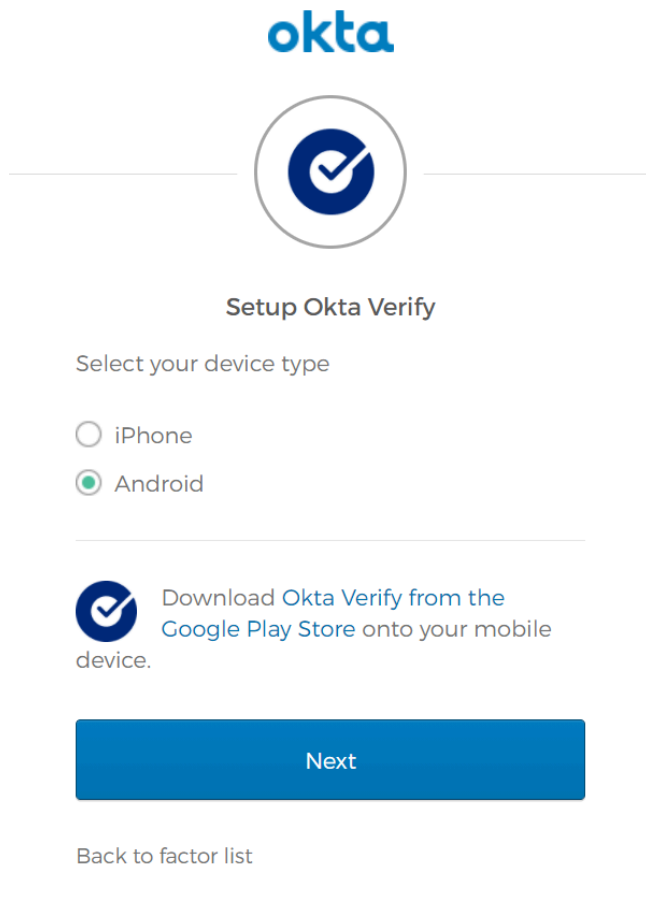security when signing in to your Okta account

Setup required

Okta Verify
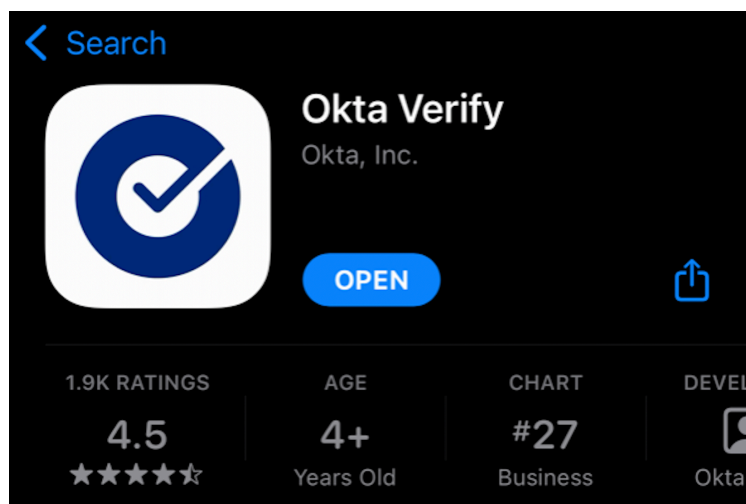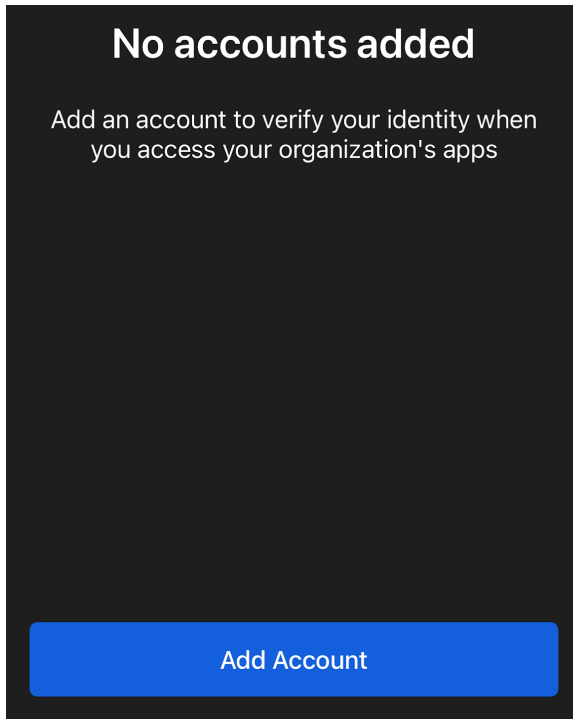Use a push notification sent to the
mobile app.

Configure factor

2. Choose your device type (**iPhone** or **Android**), then click on the **Next** button.

    okta

    Setup Okta Verify

    Select your device type

    ○ iPhone
    ◉ Android

    Download Okta Verify from the Google Play Store onto your mobile device.

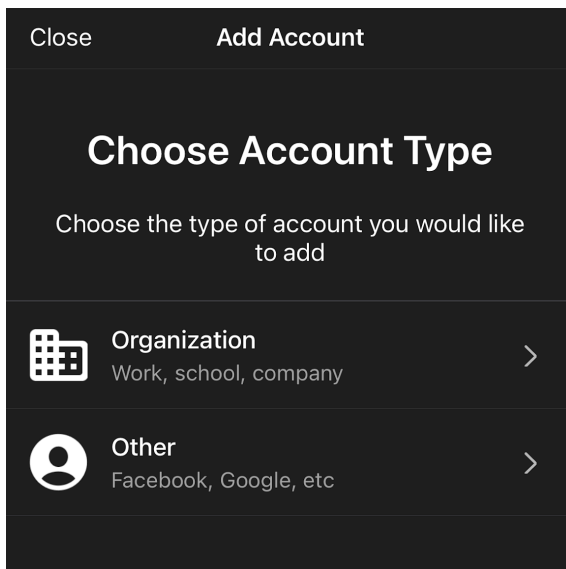   Next

    Back to factor list

3. A QR code will be displayed. Leave this screen for now and grab your phone. **Open your device's app store and download the Okta Verify app**.

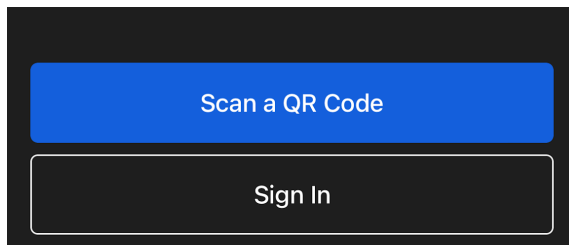   ‹ Search

    Okta Verify
    Okta, Inc.

    OPEN

    1.9K RATINGS   AGE   CHART   DEVEL

    4.5   4+   #27
    ★★★★⯪   Years Old   Business   Okta,

4. When the download is complete, open the Okta Verify app and tap **Get started** > **Next** > **Add account**.

No accounts added

Add an account to verify your identity when you access your organization's apps

Add Account

5. Tap on **Organization**.

Close   Add Account

Choose Account Type

Choose the type of account you would like to add

Organization
Work, school, company

Other
Facebook, Google, etc
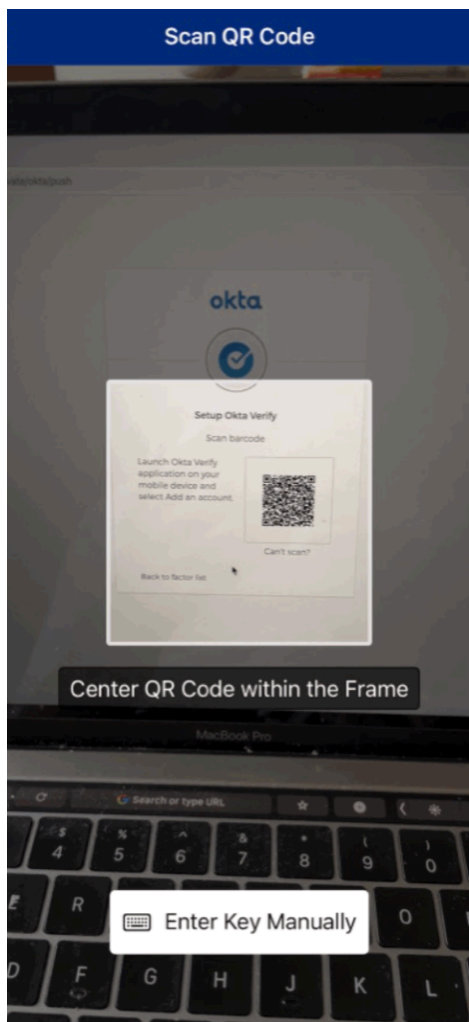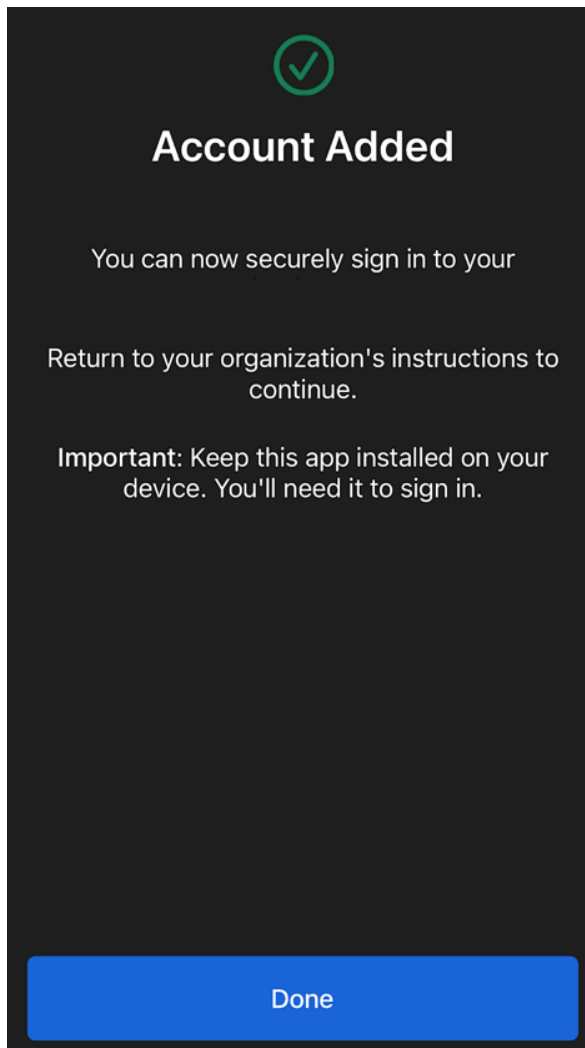
6. Tap on **Scan a QR Code**.

7. Use your phone to scan the QR code displayed on your personal computer or tablet.

If you aren't seeing the QR code, or you closed out of the page, navigate back to company.okta.com on a personal device (preferably a laptop or tablet; **not** your phone), and sign in with your Okta credentials (remember: your username is in your invite email, and the password is the one we set up in the previous section).

8. If successful, you should see an **Account Added** message. Tap on **done** to complete.

9. You should now see a six digit number that periodically changes.

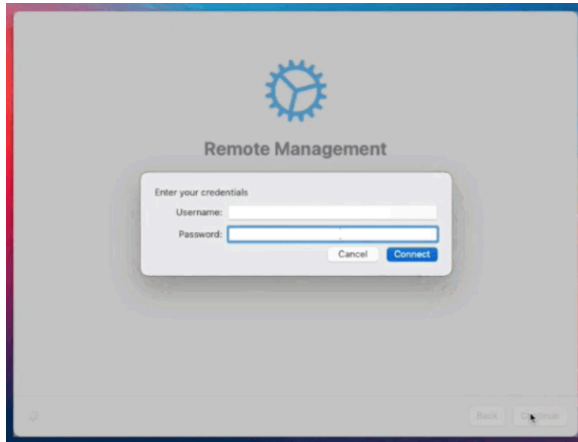   **Note**: Your username is also listed on this page, right above the six digit number.

10. You're all set! You can now use Okta Verify to sign in to Okta.

Step 3: Equipment Setup

Depending on your role, you may have received a MacBook, iPad, or PC (or any combination of these). If you didn't receive equipment, check with your manager to confirm that you need any. If you do, reach out to IT using one of the methods outlined in the Notes and FAQ section below.

Note: In order to set up your equipment, your **Okta account must be set up first**.
The steps will be different between Mac, iPad, and PC, but are all functionally similar.

1. Power on your Mac, iPad, or PC, and proceed through the steps until it asks you to **connect to the internet**. Connect to your local home network and click continue.

2. A **Remote Management** screen will appear. Use your Okta credentials to sign in (remember: your username is in your invite email and your Okta Verify app, and the password is the one we set up in the previous section).

   If the Remote Management screen does not appear: Restart the device and try again. If you are unsuccessful after attempting multiple restarts, proceed through the rest of the setup as normal and follow these steps to manually enroll your device (alternatively: make a point to reach out to IT using one of the methods outlined in the Notes and FAQ section below).

   If your credentials are not being accepted on this screen: The Remote Management screen does not have the ability to troubleshoot password or username discrepancies, so go back to your personal computer and attempt to sign in at company.okta.com.
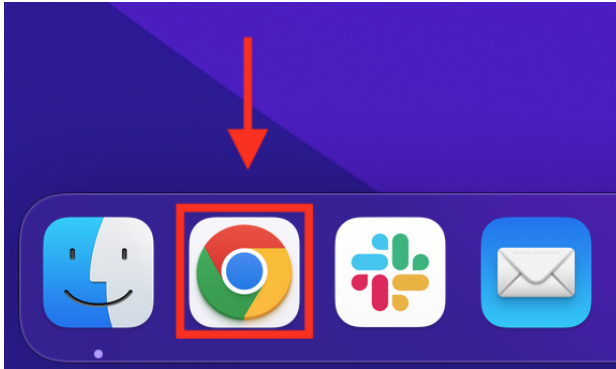
3. **iPad only:** After enrolling with Remote Management, you may see an Apple ID sign-in prompt. Skip this, and the setup is complete. Disregard Steps 4 and 5, as they pertain only to Mac and PC.

4. **Mac and PC only**: Finish the setup by creating your user account (inputting your first and last name), accept any prompts for restarts (such as for FileVault encryption), and proceed to Steps 4 and 5 once you arrive at the desktop.

Step 4: Google Chrome Setup

[Google Chrome](#) is an internet browser developed and distributed by Google. It is our preferred internet browser, and these instructions cover its configuration.

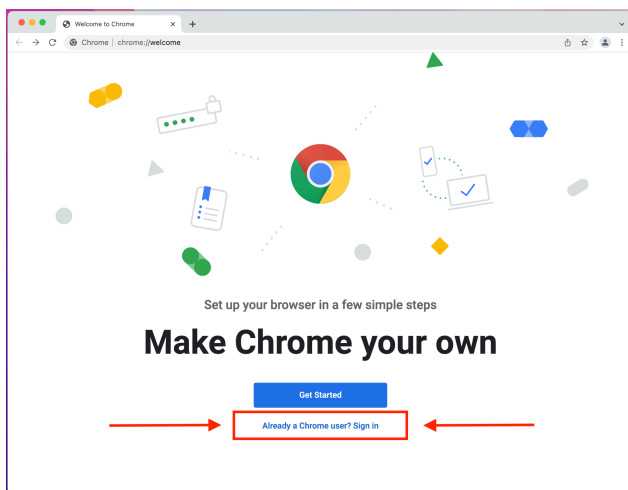**Note**: This step applies to Mac and PC only.

1. If you were able to see and sign in to the Remote Management screen during Step 3, **Google Chrome should already be installed**.

   If you don't see the app, you can search for it by clicking on the magnifying glass 🔍 in the toolbar at the top right of the screen (Mac only).

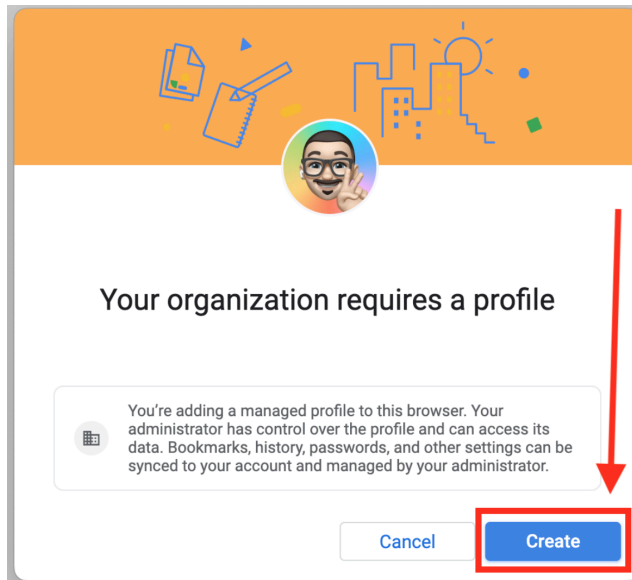   If after searching for it you still don't see it, feel free to download it directly from the Google website: https://www.google.com/chrome/

2. Upon opening Google Chrome for the first time, you will see a Make Chrome your own splash page. Click on **Already a Chrome user? Sign in**.
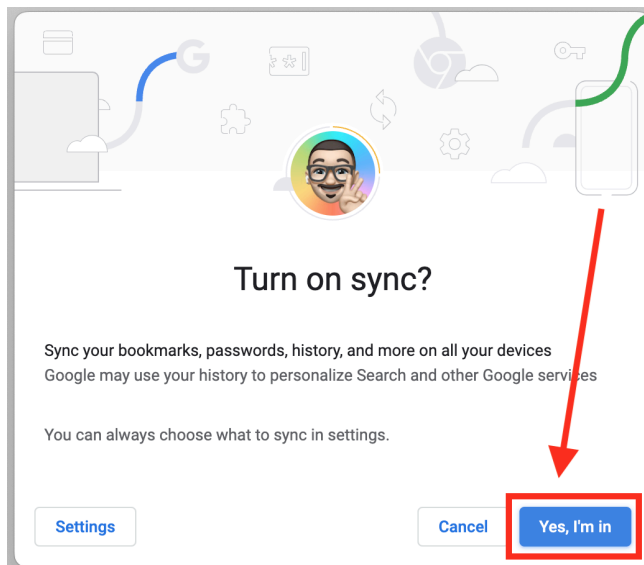
3. Sign in with your Okta credentials.

   Note: The screen may be asking you to sign in with a Google account; **do not sign in with a personal Google account**. Your Okta account includes access to Google. Type in your Okta username to trigger the Okta sign in page.

4. You will be required to create a profile in Chrome; the screen will display a message about this. To create this profile, click on **Create**.

5. The final setup page in Chrome will ask you if you'd like to turn Sync on. You do, so go ahead and click on **Yes, I'm in**.

   Note: Turning sync on will preserve any bookmarks you create from now on, but most

importantly it will populate your Bookmarks bar with a folder named "**Company Bookmarks**." Use this to access pages such as the IT Helpdesk, Workday, Learning Management System, and more.
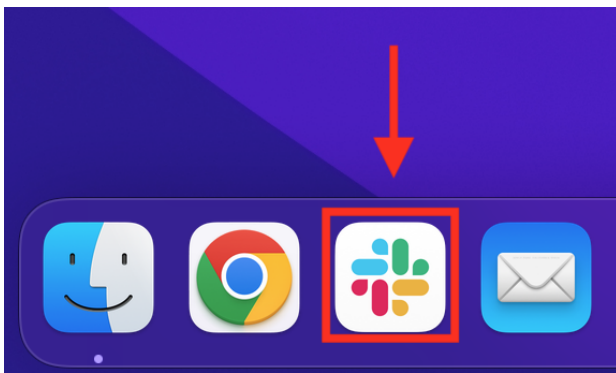
6. Now that you've successfully signed with your new Company Google account, take a moment to **sign in to your [email](#) and [calendar](#)**.

Step 5: Slack Sign In

[Slack](#) is a communications platform used by the business to keep work news, information, and conversations all in one place. Think of it like email, but faster, better organized and more secure. Instead of one-off email chains, all your communication is organized into channels that are easy to create, join, and search. These instructions cover the sign in process to get you started.

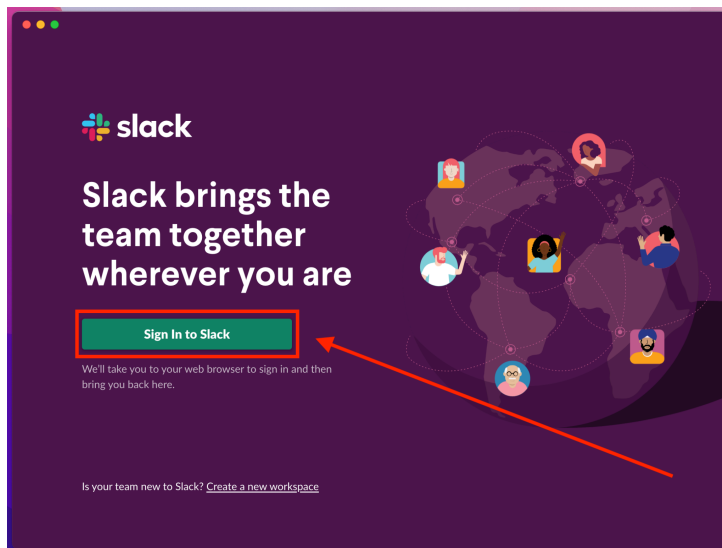**Note**: This step applies to Mac and PC only.

1. If you were able to see and sign in to the Remote Management screen during Step 3, **Slack should already be installed**.
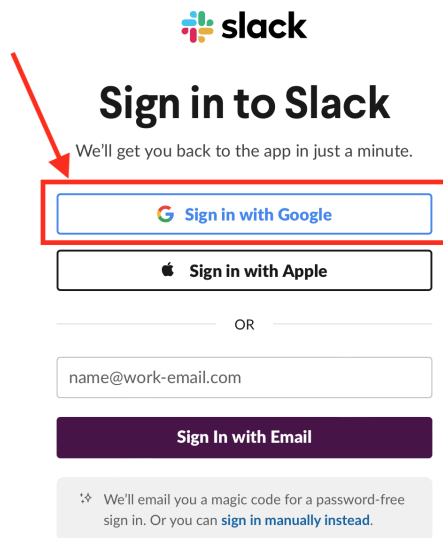

If you don't see the app, you can search for it by clicking on the magnifying glass 🔍 in the toolbar at the top right of the screen (Mac only).

If after searching for it you still don't see it, feel free to download it directly from the Slack website: https://slack.com/downloads/

2. Open Slack and click on **Sign In to Slack**.

3. **Sign In to Slack using your Company Google account** (remember: typing your Okta username into the sign in field will trigger the Okta sign in page).

4. **Note**: You can also access Slack via the web. To do this, simply click on the Slack tile in your Okta grid at company.okta.com.
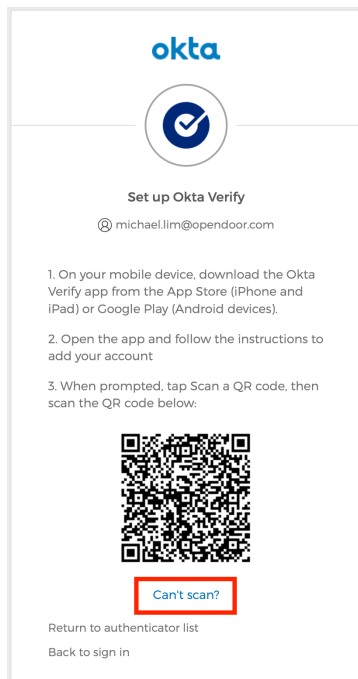
Notes and FAQ

Is there a video recording of these instructions?

➢ **Yes!** A video version of these written instructions can be viewed here.

I don't have a separate computer for scanning the QR code in Okta Verify. Can I link my account another way?

➢ **Yes; provided that you have a smartphone!** After setting up your password, navigate to company.okta.com in the browser on your phone. Sign in with your username and password, and you will be prompted with a QR code to scan. Tap on the small text beneath the QR code that says "Can't Scan?"

➢
➢ You will be provided with two alternative setup options: to receive a setup link via email or text. Follow one of these to link your account with the Okta Verify app.

Remote Management does not appear during Equipment Setup. What can I do?

➢ **For Macs and iPads:** Please follow these instructions to manually enroll your device with our system. If you run into any issues, please attend one of our help sessions, or reach out to IT using one of the options below.

➢ **For PCs:** Please attend one of our help sessions, or reach out to IT using one of the options below, so that we can work with you to rectify this issue.

Can I sign in to Slack/email/calendar/etc on my personal device?

➢ While possible, and keeping in mind the importance of Work/Life balance, IT recommends **against** doing this. If you choose to do so, however, we recommend that you sign in to your work accounts (such as email and calendar) in an app separate from the one you use for your personal accounts.

Why don't I have access to [*insert app name here*]?

➢ Your manager sent us a list of apps and services that you needed ahead of your first day. Now that this day has arrived, any new or elevated access outside of this list will require a ticket filed with IT (see below if you're not sure how to do this) and documented approval from your direct manager.

Note: The quickest way to get a new app added is for your manager to submit the ticket, which will avoid a delay with gaining and documenting their approval.

I'm new to Mac. Are there any resources available to help me learn?

➢ **Yes!** Yes! Check out Apple's official user guide here, which includes information about how to use a Mac, where the different buttons and ports are located, as well as some tips and tricks.

I'm new to Gmail. Are there any resources available to help me learn?

➢ **Yes!** Google Workspace Learning Center has training and help center articles that are available to all users. Their gmail training and help page can be found here, and is particularly helpful for users who are new to using gmail.

I'm new to Slack. Are there any resources available to help me learn?

➢ **Yes!** Slack has an in-depth, highly polished knowledge base that's available to all users. Their Slack Tutorial section, which can be found here, is particularly helpful for new users.

How to Contact IT

Now that you're all set up, there are three ways that you can get help from IT moving forward:

1. Send a Slack message to our AI Assistant

2. Open a ticket online

3. Send an email to it@company.com