



New Employee Mac Setup Guide

We're thrilled to have you join SoFi Technologies! This guide will walk you through everything you need to get your IT systems up and running smoothly.

Before You Begin

Please read this entire guide before you start. We recommend beginning the setup process at least two (2) hours before your first scheduled meeting. The initial setup process should take about 20-30 minutes, though actual time will vary based on your Internet connection bandwidth. If you run into any issues, check the **Troubleshooting** section on **Page 16**.

For persistent problems, please join our **Optional Day 1 IT Drop In Session**. You'll find the invite in your personal email. This session is scheduled on Mondays (Or Tuesdays, if a holiday falls on a Monday).

IMPORTANT: Please do not attempt to set up your computer using your personal email address or the credentials you have been using for Workday.

You will be able to start setting up your computer once you receive your **Account Information**.

Account Information Delivery

Full-Time Employees

Your account information will be sent to your personal email address by the morning of your first day. Keep an eye out for a secure message from onboarding-all@sofi.org with the subject line "**New Employee Account Information**." *Sometimes this email might land in your spam or junk folder, so don't forget to check there if it doesn't appear in your inbox.*

If you are unable to locate it let us know by email onboarding-all@sofi.org and we will resend it to you.

Contingent Workers


Your account information will be sent to your personal or parent company email address by the morning of your first day. Keep an eye out for a secure message from onboarding-all@sofi.org with the subject line "**Contingent Worker Account Information**." *Sometimes this email might land in your spam or junk folder, so don't forget to check there if it doesn't appear in your inbox.*

If you are unable to locate it let us know by email onboarding-all@sofi.org and we will resend it to you.


Retrieve Account Information



1. Check your personal email for the message and click the **Click here** link in the email.

New Employee Account Information - Edwin Rodriguez

 This message was sent with High importance.

 onboarding-all@sofi.org
To: 

 SecureMessageAtt.html
17 KB



This is a secure message.

[Click here](#) by 2022-11-25 14:36 PST to read your message.
After that, open the attachment.

[More Info](#)

Disclaimer: This email and its content are confidential and intended solely for the use of the addressee. Please notify the sender if you have received this email in error or simply delete it.

Secured by Proofpoint Encryption, Copyright © 2009-2022 Proofpoint, Inc. All rights reserved.


2. You will be asked to register with our secure mail service by entering your name, a password, and a security question. Once completed, click **Continue**.


SoFi Registration


Create your account to read secure email.


Email Address: 

First Name:

Last Name: 

Password: 

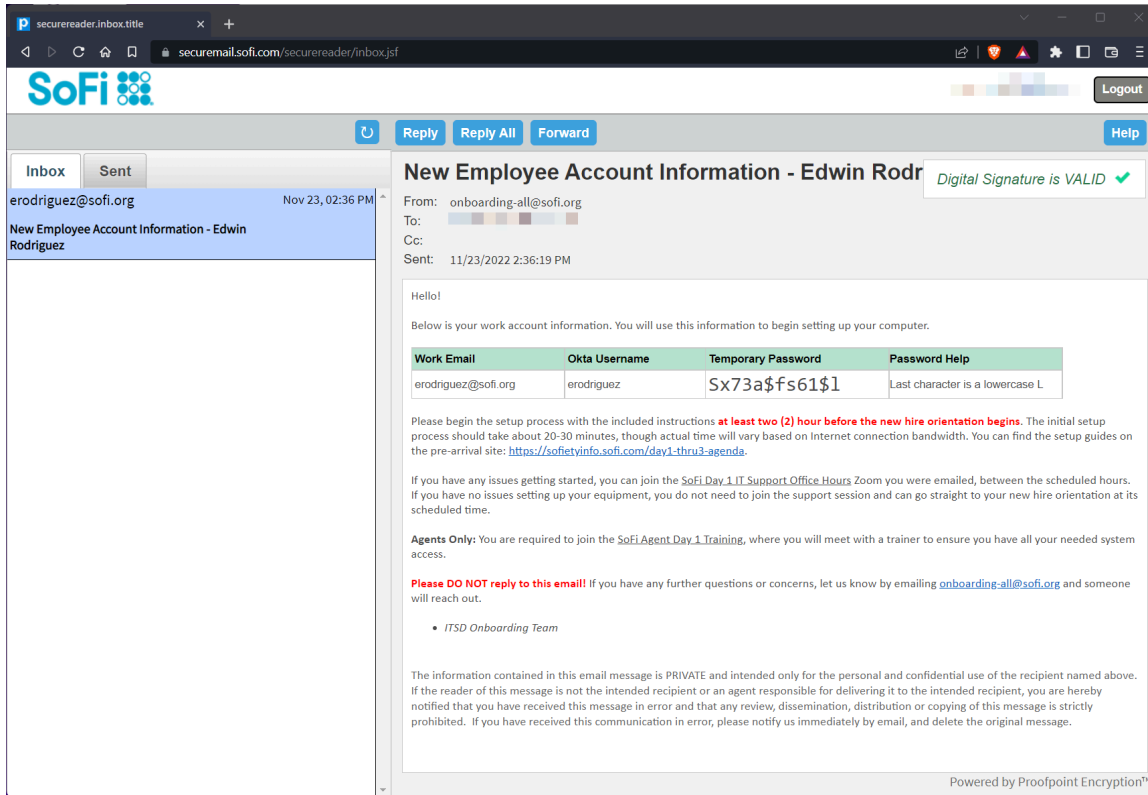
Confirm Password: 

Question : 

Answer:

Continue

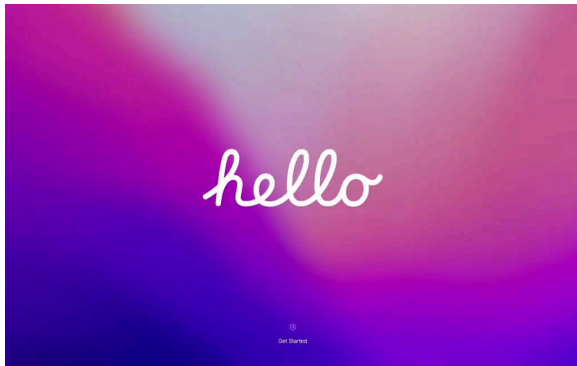
3. You will then be logged in and can view the account information email.



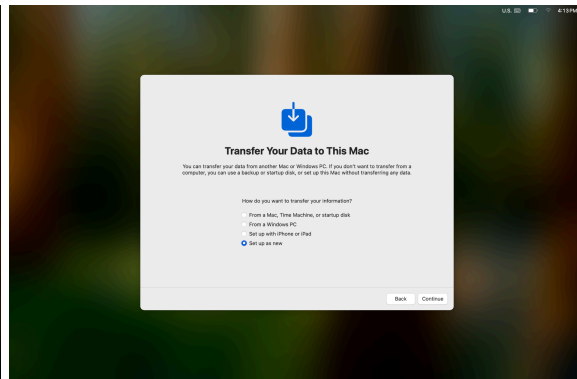
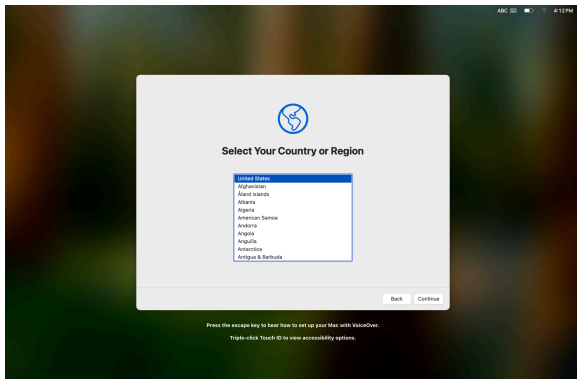
If you have any questions or issues regarding your account information, you can reply directly from the secure message. Otherwise, email onboarding-all@sofi.org.

Computer Setup Instructions

1. Power on the laptop and click the **next arrow** above *Get Started* at the bottom of the screen.



2. Continue with selecting your language, region, and any accessibility options. When you reach the *Transfer Your Data to This Mac* screen, select **Setup as new**.



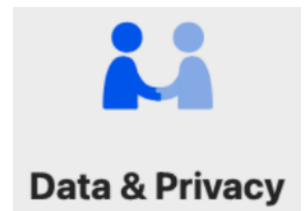
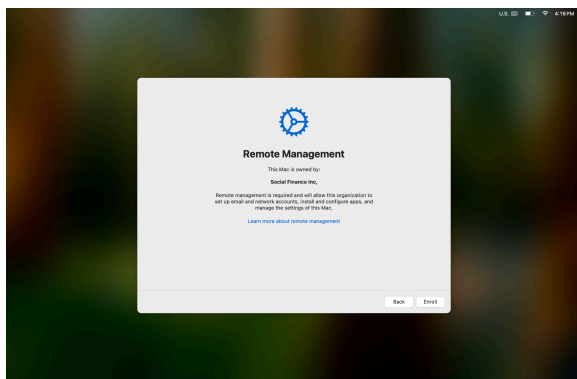
3. When asked to *connect to a network*, locate your local WiFi network, enter your security key, and hit the **Return** key.



- You may be prompted for a software update if the device does not meet the current minimum OS requirement. If so, proceed with the update and once completed, your device will restart and you can proceed from **Step 2**.

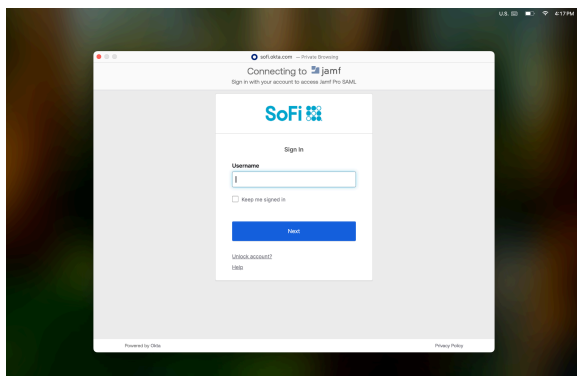


- You should now be presented with the Remote Management screen, click **Enroll**.



- DO NOT PROCEED** if you get the Data Privacy notice instead of the Remote Management screen,, please join the *Day 1 IT Office Hours* for further assistance.

- A window will open and will be presented with the Okta sign in screen. Enter your **username** or **work email**, *both work to sign into Okta*, as shown in your account information email and click **Next**.



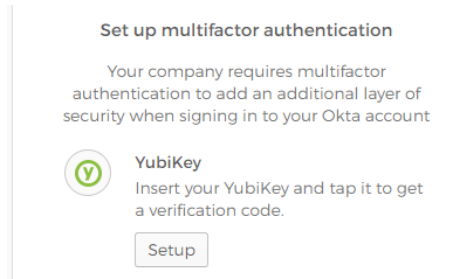
- If you are presented with a blank window for more than a minute, click the **Cancel** button and click **Enroll** again.

7. You will then be asked to enter your password, enter the temporary password as shown in your [account information](#) email and click **Next**.
8. Next you will be prompted that your password has expired and will be required to enter a new password, re-enter to confirm and click **Change Password**.
 - Password requirements are:
 - i. At least **12 characters**
 - ii. A lowercase letter
 - iii. An uppercase letter
 - iv. A number
 - v. A symbol
 - vi. No parts of your username
 - vii. **Keep in mind that** this will be your password for your computer and Okta account.
9. Next you will be prompted to "set up security methods". Start with setting up your *security question* by clicking **Set up** under *Security Question*.
10. You can select **Choose a security question**, select a question and enter your answer; Or select **Create my own security question** and enter your desired question and answer. Afterwards click **Verify**
11. Next you will set up your multifactor authentication (MFA) method.
 - If you are a full-time SoFi or Golden Pacific Bank employee (including intern) you are required to have a YubiKey registered to your Okta account.
 - If you are a full-time Galileo employee (including intern) or contractors for SoFi or Galileo you are required to set up Okta Verify on a mobile device.
 - **Additionally, if you are a Full-time Galileo employee please be sure to register the YubiKey you receive after setting up Okta Verify as there are plans to require YubiKey for all employees at a later date.**

12. Below provides the instructions to register your MFA method(s). Full Time Employees and Interns will find this located in your New Hire kit. If you are unable to locate the Yubikey, check the USB-C port in case this is already inserted. If you're still unable to locate the Yubikey, please contact onboarding-all@sofi.org.

○ **YubiKey Registration**

- i. Click **Set up** under the **YubiKey** option.



- ii. If you haven't already, insert the YubiKey into one of the available USB-C ports on your laptop.

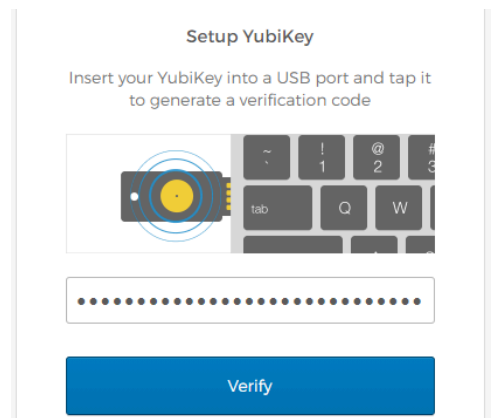


- iii. Make sure the cursor is in the box and touch the **gold part of your Yubikey** for a few seconds and a hidden string of characters will be entered. If it doesn't proceed automatically, click **Verify**.

- If you receive an error message stating that your YubiKey is unrecognized please join the **Day 1 IT Drop In Session**.

- iv. If successful, you will be presented with the option to set up additional MFA methods. None of these are required, but you are free to set them up if desired.

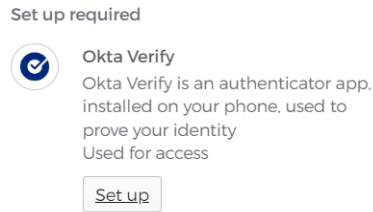
- v. Scroll to the bottom and click **Set up later**.



○ **Okta Verify Setup**

- i. If you haven't already, download the *Okta Verify* from your mobile device's app store.
- ii. Once the *Okta Verify* app is downloaded on your mobile device, open it and select **Add Account** followed by **Organization type**.
- iii. You will then be prompted to scan a QR code. Tap **Yes I'm Ready** and allow the app to utilize your camera if prompted.

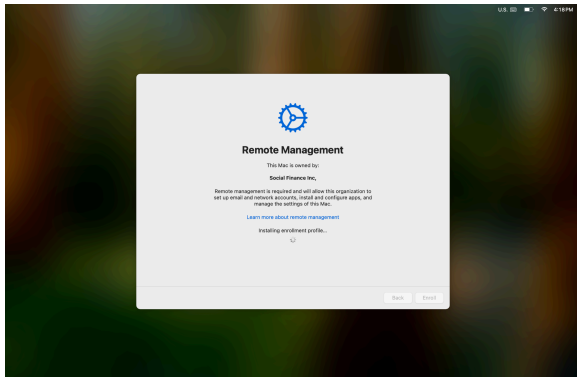
- iv. Go back to your computer and click **Set up** under the **Okta Verify**.



- v. You will then be prompted to scan a QR code. Tap **Yes I'm Ready** and allow the app to utilize your camera, if prompted
- vi. Below the instructions for downloading the app, you will be presented with a QR code to scan with your phone.

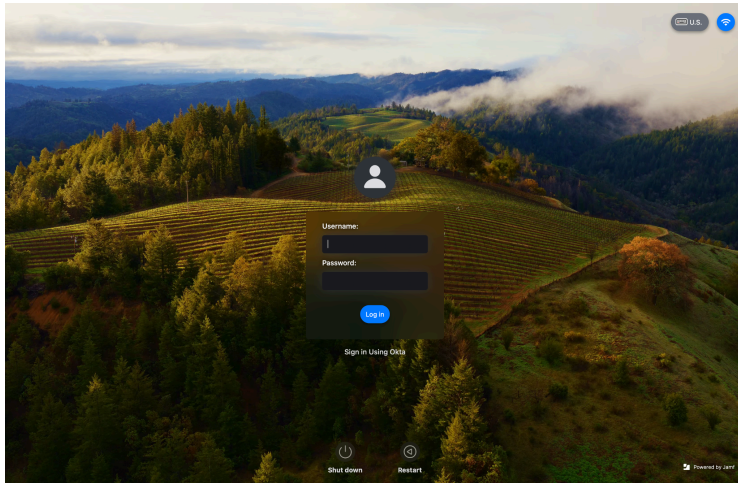


- If your phone has biometrics, you will be asked if you want to enable it, **this is recommended.**
- vii. Next you will receive a prompt in the Okta Verify app verifying it's you, click **Yes, it's me**
- viii. If successful, you will be presented with the option to set up additional MFA methods. None of these are required, but you are free to set them up if desired.
- ix. Scroll to the bottom and click **Set up later.**
13. The window will close and return you to the Remote Management screen for a few moments while the pre-stage profiles are installed.

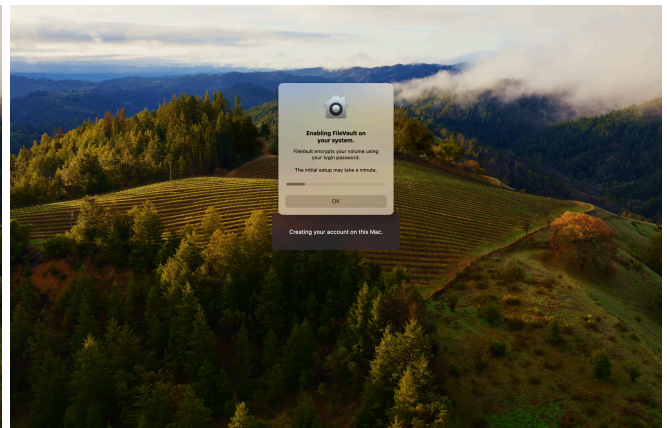
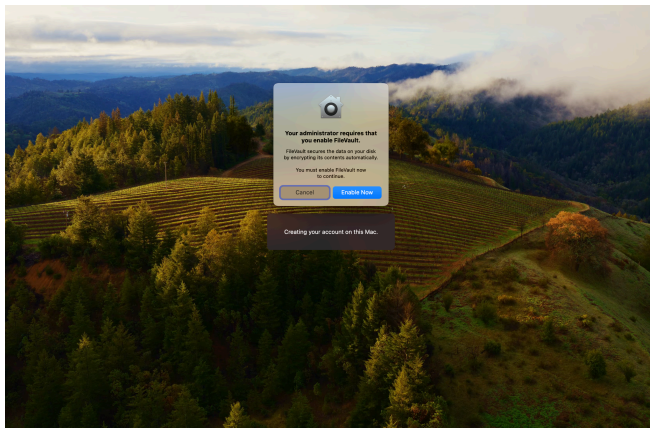


- If you see your Okta tiles immediately, click cancel to return to the *Remote Management* window and start the sign in process again.

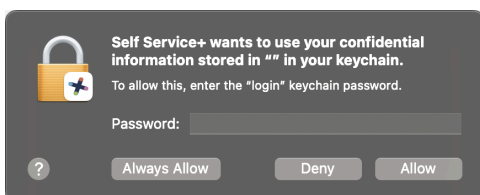
14. Afterwards, it will proceed and present the option to **Enable Location**, check the box and click **Continue**.
15. When you are presented with a gray login screen. Enter the username and the new password you created and click **Login**.



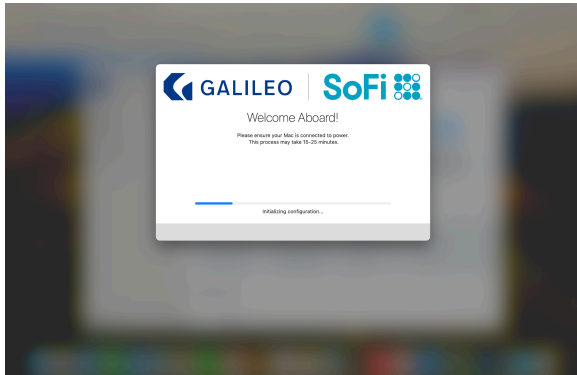
- **Note:** If you receive an error on this screen and are unable to login, wait about one minute and restart the computer. If you still receive it after restarting, join the [IT Office Hours](#) Zoom session.
16. When prompted for multifactor, use your **YubiKey** or **Okta Push** option to verify.
 17. If you are presented with the device usage [Terms & Conditions \(T&C\)](#), check the **I agree** box and click **OK**.
 18. **You will be prompted that your administrator requires you to enable FileVault, click [Enable Now](#). It will take a moment to enable and proceed.**



19. You will be presented with [Accessibility](#), [Touch ID](#), and [Choose Your Look](#), options. Follow the on screen instructions to complete those as desired.
20. **You will see another prompt to allow *Self Service+*. This is crucial in keeping your Okta password synced with your computer's local account. Enter your Okta password and click [Always Allow](#).** If you click *Deny* or *Allow* please join the IT Drop In Session or submit a support ticket in SoFi Compass..



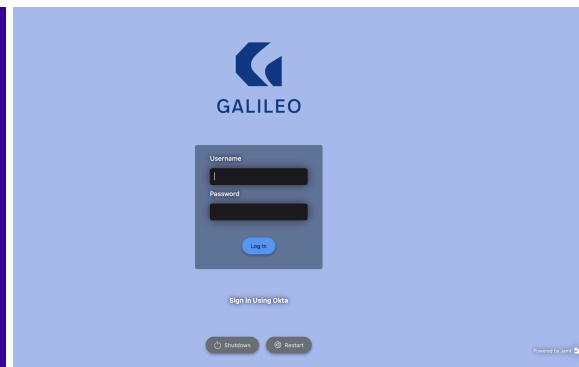
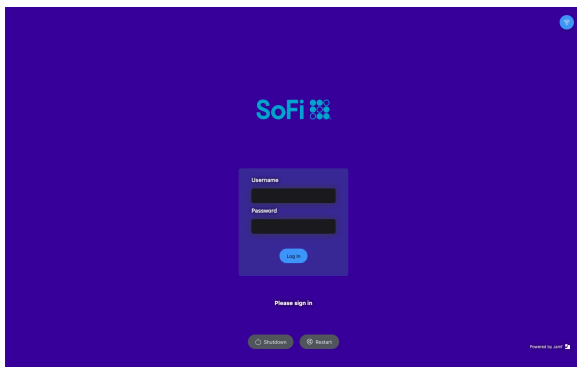
21. A couple of minutes after you reach your desktop, an installation window should appear.; This process will take about 15-25 minutes, depending on your Internet connection and your computer will restart once completed



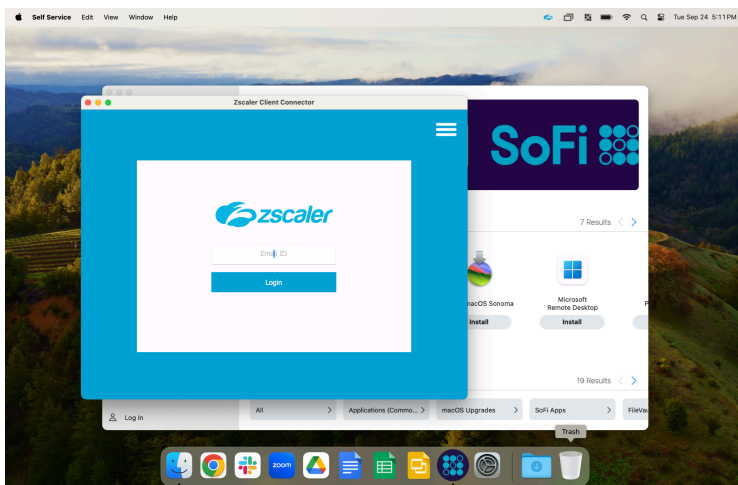
- **Note:** Sometimes the window fails to launch but the applications will still download in the background. Give it about 15-20 minutes and Zscaler should show up. Once it does you can proceed to *step 20*. If it does not, please join the **IT Drop In Session** for further assistance.

22. After restart you will be presented with the *FilleVault* login screen. This is the macOS encryption screen you will see whenever your computer is restarted. Select your profile and enter your Okta password.

23. When you get to the login prompt, known as the *Jamf Login* screen, enter your Okta username and password, followed by your MFA method and T&Q.



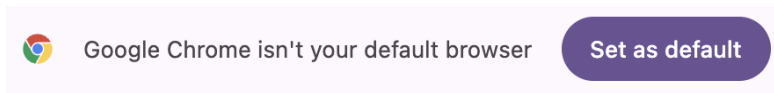
24. Once logged in you should see Zscaler open ready to sign in.



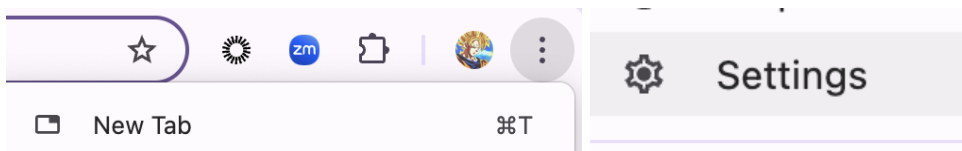
Default Browser Selection

You will need to set Google Chrome as your default browser so when signing into your base apps, Chrome will open instead of Apple Safari.

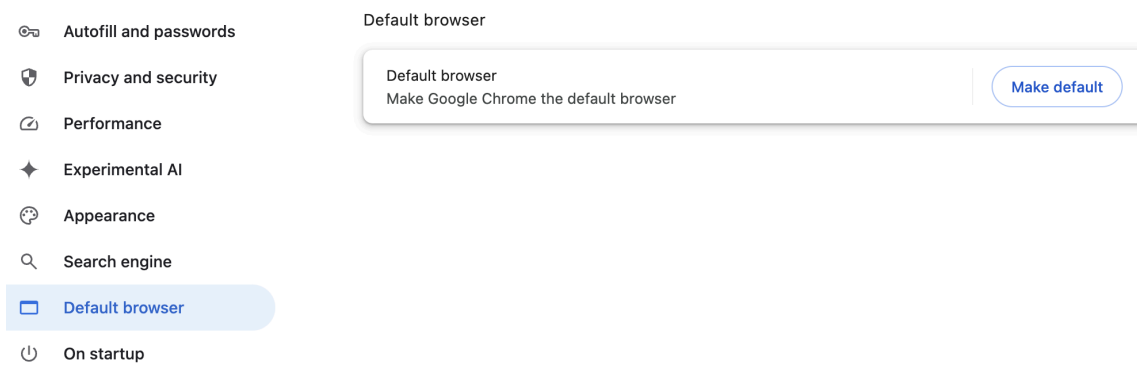
1. If Chrome did not prompt you to set as default during initial sign in, you should be able to trigger the it by simply quitting the application by pressing and holding **command + Q** on your keyboard and relaunching and clicking **Set as default**



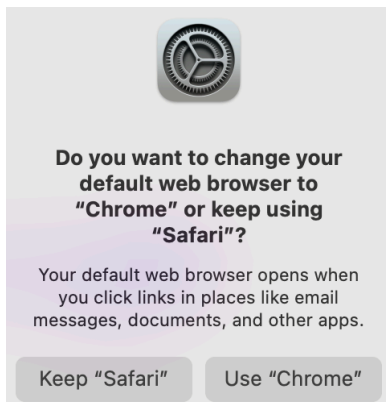
2. If you do not get the prompt, you can click the three dots at the top right of the Chrome windows and click **Settings**



3. Once in settings, click **Default browser** and click **Make Default**.



4. You will get another prompt asking if you want to change the default browser. Click **Use Chrome** and you will be all set.

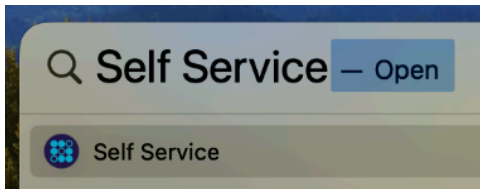


Dock Declutter

Your dock should have updated with the base apps once your computer completed enrollment and restarted. If your dock did not update, perhaps due to the installation window not coming up after you got to your desktop, you can manually update by running the task in *Self Service*.



1. Open *Self Service* by searching for it using *Spotlight* (macOS search function). You can open *Spotlight* by pressing **command + space bar** on your keyboard or clicking the magnifying glass on the menu bar the top-right of your screen



2. Once open, enter "dock" in the search box at the top left and you should see the **SoFi macOS Configured Dock** item.



SoFi macOS
Configured Dock

Install

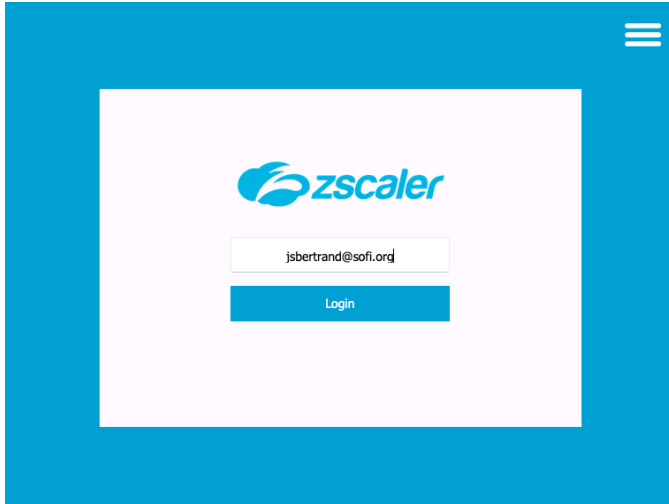
3. Click **Install** and give it a minute or two to complete. Once completed you should see your dock update with the base apps.



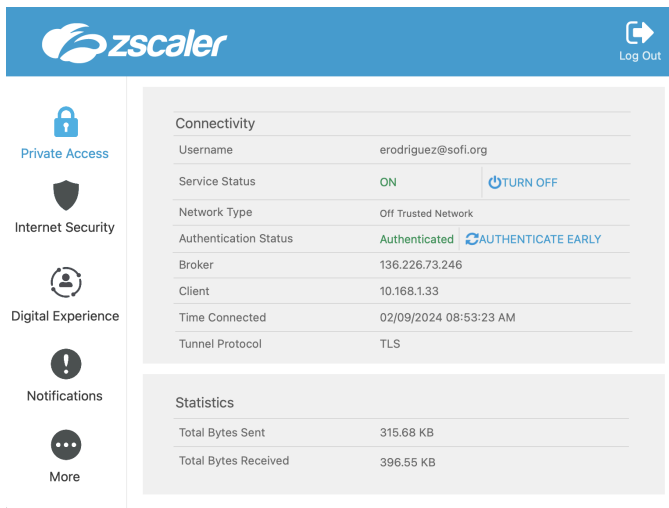
Zscaler VPN Connection

Zscaler is our VPN client. You will be required to have a consistent connection to the VPN in order to access most systems on your computer, including but not limited to Gmail, Freshservice, Slack, etc. You can access these tools on your mobile phone without VPN.

1. If it didn't automatically open, click the Zscaler icon from the menu bar.
2. Enter your work email address and click **Login**.



3. Next you will need to authenticate with Okta by entering your Okta username and the password you set during enrollment.
4. Once successfully connected you will see *Service Status* set to **ON** and *Authentication Status* set to **Authenticated**.




- If you receive an error stating you're 'attempting to access a restricted application' when trying to accessing or authenticating an app through Okta, we recommend the following:
 - i. Restart your browser by closing all windows, reopen, and try sign into Okta again
 - ii. Open Zscaler and reauthenticate by clicking **AUTHENTICATE EARLY**
 - iii. Check your local network devices and ensure you have a stable internet connection

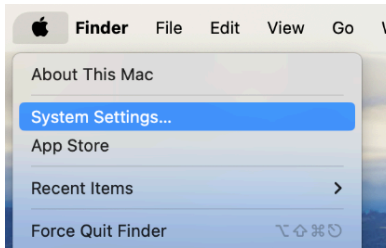
New Employee Software Setup Guide

Don't forget to use [New Employee Software Setup Guide](#) (↩️ *Direct link*) to sign into your base applications: Google Chrome, Slack, Zoom Workspace, and the Zoom Chrome Extension. This can be done while macOS system updates are being installed as detailed in the next section.

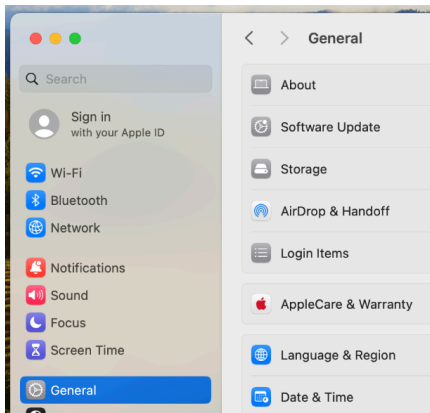
Check for System Updates

Please follow the directions below to install the latest macOS system updates.

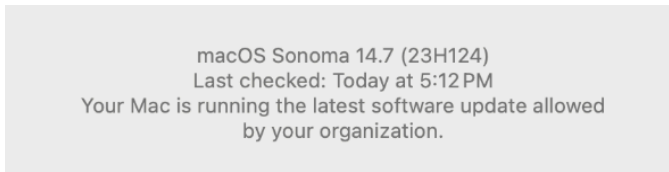
1. On your Mac, choose the *Apple* menu  and select **System Settings**.



2. Click **General** on the left side of the *System Settings* window, then click **Software Update** on the right.

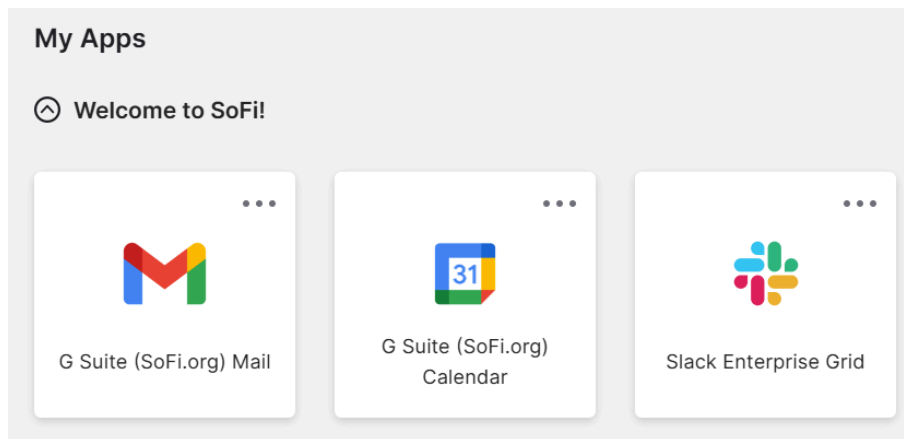


3. Click **Check for updates** followed by **Download/Install Now** if it indicates there are updates available.
4. When prompted to do so, click **Restart**.
5. After your computer restarts, repeat the process until *your Mac is up to date*.



What Next?

Navigate to Okta (sofi.okta.com), then open **Gmail**, **Google Calendar**, and **Slack**:



You'll receive further instructions from your manager or our Onboarding team and can view upcoming events on your Google Calendar.

Full Time Employees Only: New to Google Workspace or Slack? Check out the New Hire Checklist that will be emailed to your work email on the morning of your start date. Included here are recommended (free) LinkedIn Learning courses to help you optimize your productivity and get started with Google Workspace and Slack. *This will be reviewed in detail with you during your New Hire Orientation.*

Troubleshooting

This section contains troubleshooting for common issues encountered during setup. Please utilize this information if you run into any issues. If you are unable to resolve the issue you are having you can join the *Day 1 IT Office Hours Zoom* session during its scheduled times. You should have received an email invite to both your personal and work email, as well as see it on your work calendar.

YubiKey Not Working

If your YubiKey doesn't appear to be working when touching. Ensure that it is fully inserted into the USB port. It should be fully flushed against the laptop. Sometimes it requires a little force to go all the way in.



Since the YubiKey is an input device it is detected by the system as a keyboard. This sometimes prevents it from being used until you allow it, which cannot be done until you get to the desktop. If you are unable to use your YubiKey, please join the [Day 1 IT Office Hours Zoom](#) session for assistance.

Did Not Receive YubiKey

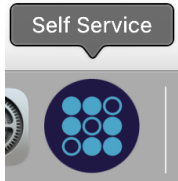
YubiKeys are the required Okta multifactor method for full-time SoFi and Global Pacific Bank employees and SoFi interns only. If you are a Galileo, Galileo LATAM employee, or contingent worker (including for SoFi) your required multifactor method is Okta Verify.

If you are a Full Time SoFi employee or SoFi Intern and do not appear to have received a YubiKey, double check your shipment confirmation email to ensure it was included. If so, you can check its delivery status. Your Yubikey will be packaged inside your New Hire kit. Sometimes Yubikeys may already be inserted into the USB-C port. If you were not sent one or unable to locate it, let us know by emailing onboarding-all@sofi.org and we will add a YubiKey bypass so you can configure and use Okta Verify until you locate or receive a YubiKey.

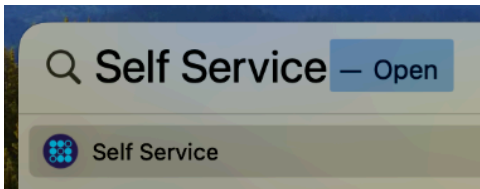
Install Missing Apps from Self Service

If you appear to be missing any apps such as Zscaler or Slack, you can install them manually by searching for them in *Self Service*.

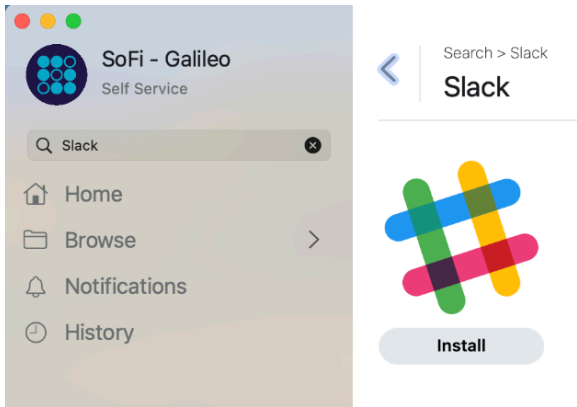
1. From your dock open **Self Service**.



- If you do not see it on your dock you can search it using *Spotlight* (macOS search function). You can open *Spotlight* by pressing **command + space bar** on your keyboard or clicking the magnifying glass on the menu bar the top-right of your screen



2. Once open, enter the name of the missing app in the search box at the top left and you should see it appear in the results.
3. Click **Install** and give it a few minutes to complete.



4. Once installed you should be able to open the application.

If you experience any difficulty completing your computer set-up process, please join the Optional IT Drop In Session (emailed to your personal email address) or contact the IT Service Desk at 1-844-442-5666 – leave a voicemail and the next available agent will return your call.