



New Employee PC 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 15**.

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 select 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**.





Registration


Create your account to read secure email.

Email Address: 

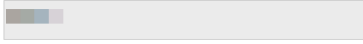
First Name:

Last Name: 

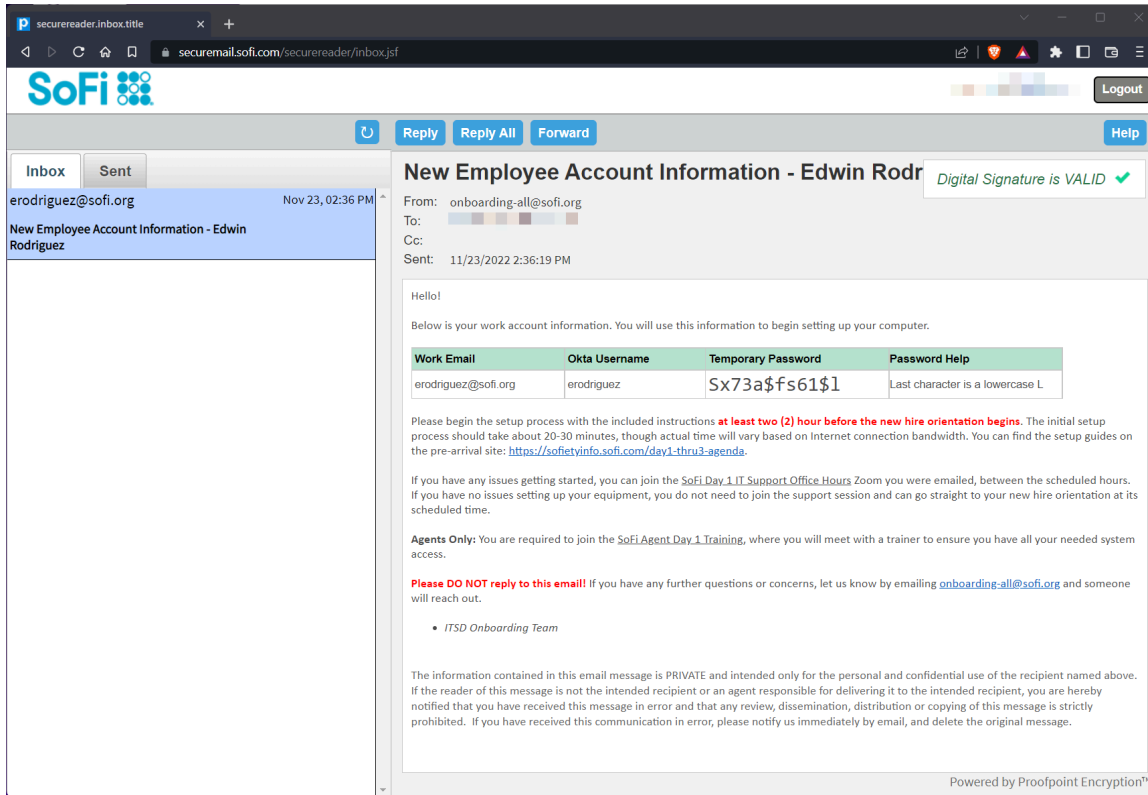
Password: 

Confirm Password: 

Question :

Answer: 

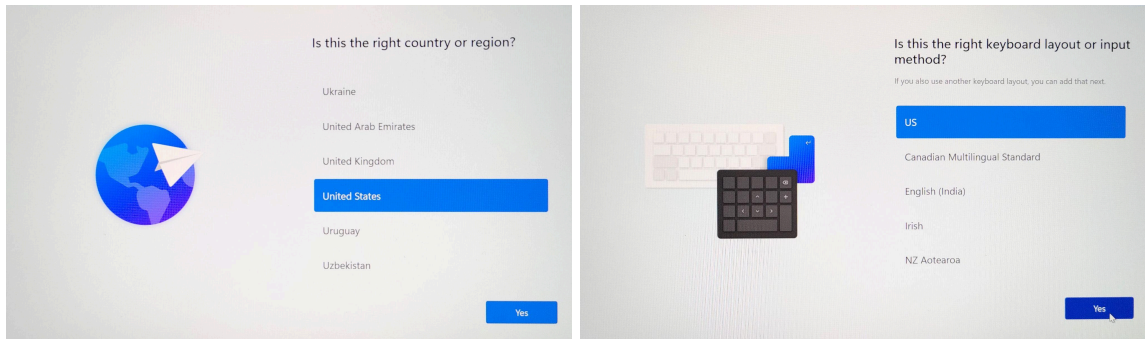
3. You will then be logged in and can view the account information email.



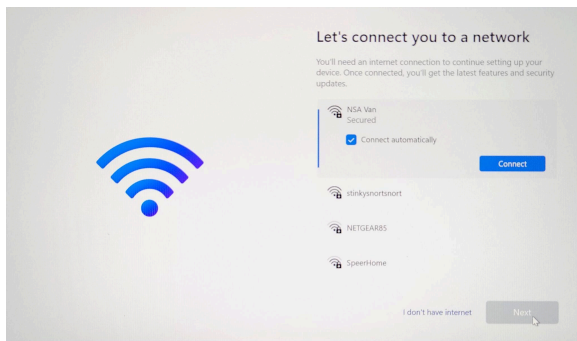
If you have any questions or issues regarding your account information, you can reply directly from the secure message. Otherwise, email onboarding-all@sofi.org.

Computer Enrollment

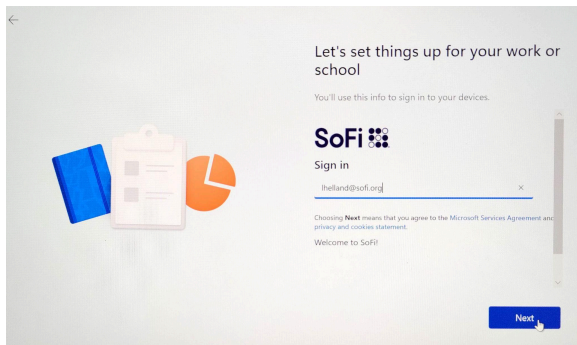
1. Power on your computer and follow the on-screen instructions for region and keyboard layout selections.



2. When asked to *connect to a network*, locate your local WiFi network, enter the security key, and click **Connect**. Once connected click **Next**.



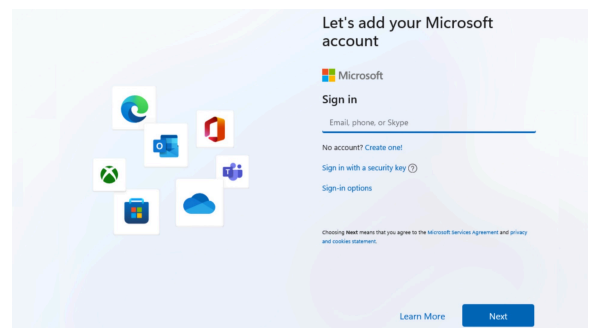
3. After checking for updates the computer will restart and you will be presented with a sign in screen for SoFi, enter your work email address and click **Next**.



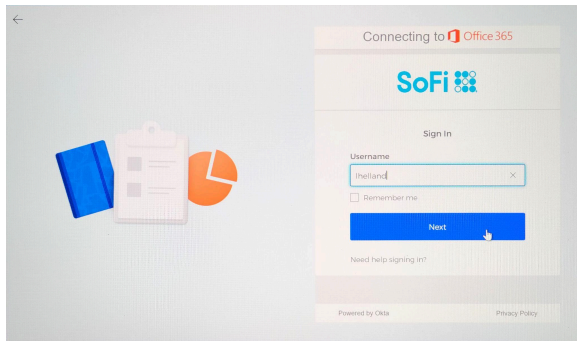
- o **DO NOT PROCEED** If you are presented with a *Microsoft Account sign in* and please join the **Day 1 IT Drop In Session** for further assistance. Your work email address will be accepted here, but your computer will not set up properly if you proceed.

4. Be sure you enter your **work email address** as shown in your account information email:

- o If you are a SoFi employee, be sure to use *username@sofi.org* and **not @sofi.com**.
- o If you are a Galileo employee, be sure to use *username@galileo-ft.com* and **not @galileo-ft.org**.



5. You will be presented with the Okta sign in screen. Your work email should automatically populate. If not, enter your **username** or **work email**, both work to sign into Okta, as shown in your account information email and click **Next**.

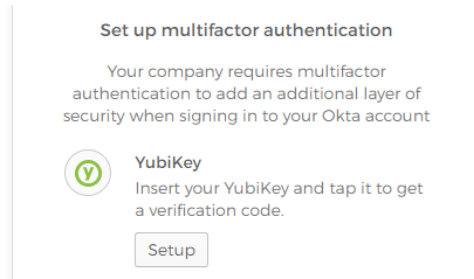


6. You will then be asked to enter your password, enter the temporary password as shown in your account information email and click **Next**.
- Be sure to reference the *Password Help* section in your secure email to ensure you are using the correct characters, for example, an **uppercase O** versus the **number zero (0)**, which can be easily mixed up.
7. 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.
8. Next you will be prompted to "set up security methods". Start with setting up your *security question* by clicking **Set up** under *Security Question*.
9. Select **Choose a security question**, choose a question and enter your answer; Or select **Create my own security question** and enter your desired question and answer. Afterwards click **Verify**.
10. 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.**

11. 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.

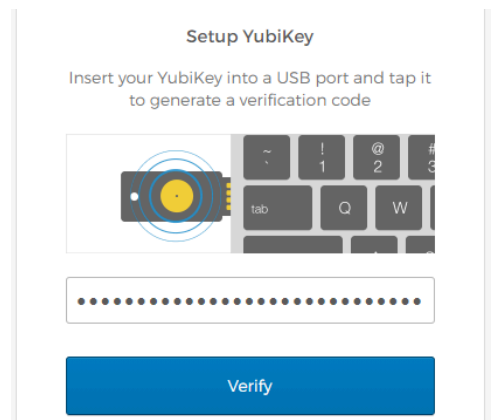


iii. Make sure the cursor is in the box and touch the **gold part of your Yubikey** for a few seconds and a hidden string of characters will be entered. If it doesn't proceed automatically, click **Verify**.

- 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.

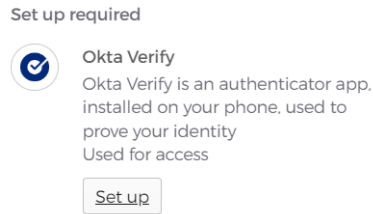
v. Scroll to the bottom and click **Set up later**.



○ **Okta Verify Setup**

- If you haven't already, download the *Okta Verify* app from your mobile device's app store.
- Once the *Okta Verify* app is downloaded on your mobile device, open it and select **Add Account** followed by **Organization Type**.
- 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 **Okta Verify**.



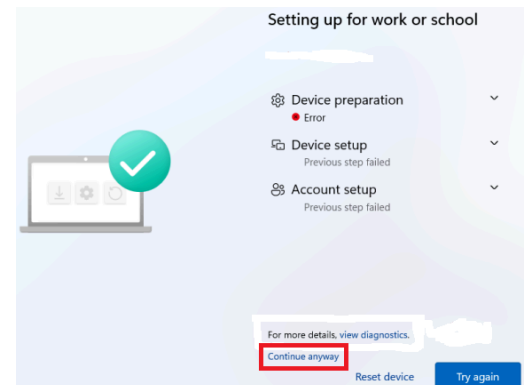
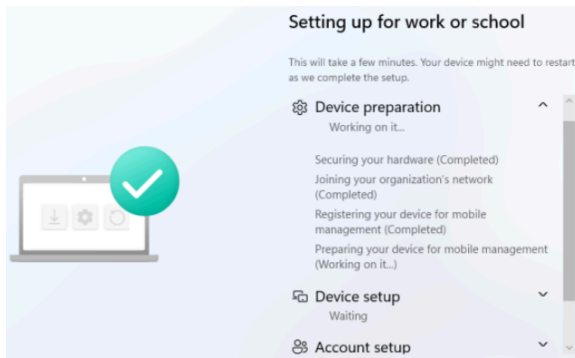
- v. Below the instructions for downloading the app, you will be presented with a QR code to scan with your phone.



- If your phone has biometrics, you will be asked if you want to enable it, **this is recommended.**

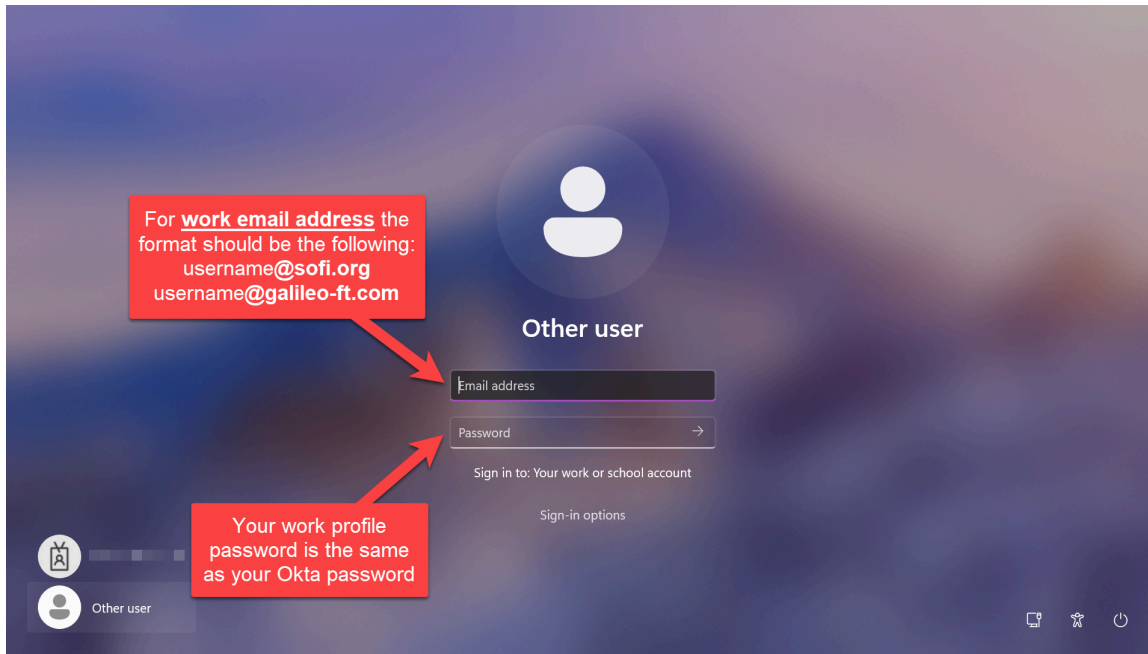
- vi. Next you will receive a prompt in the Okta Verify app verifying it's you, click **Yes, it's me**
- vii. If successful, you will be presented with the option to set up additional MFA methods. None of these are required, but you are free to set them up if desired.
- viii. Scroll to the bottom and click **Set up later.**

12. You will then see a few progress messages until you land on the *Setting up for work or school* screen (image below). This process should take approximately 20 minutes:

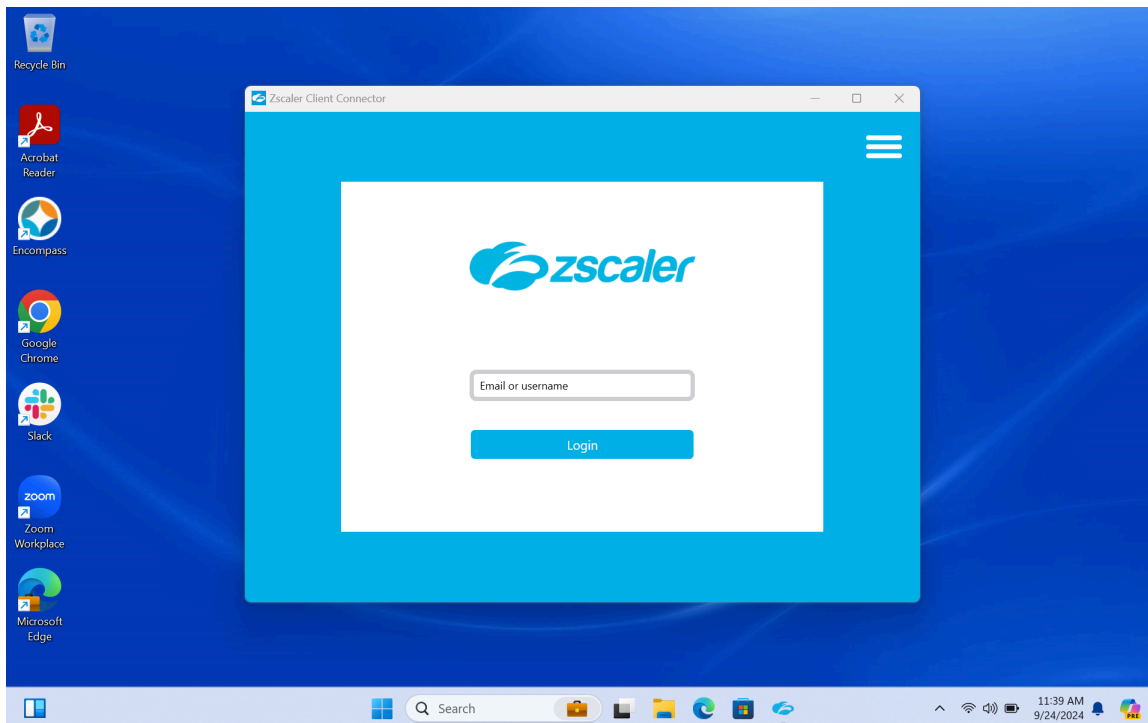


- If you 1) are not presented with the screen above and immediately see your Okta tiles, or 2) you're presented with a Microsoft sign in screen and told your account doesn't exist, **power down the computer and sign in again.**
- Occasionally, device enrollment will fail due to an unforeseen issue such as a server outage, network interruption, or application issue. **Do not RESET DEVICE or TRY AGAIN** as this will wipe the device and start the configuration process from scratch, which can take a significant amount of time. Proceed by clicking **Continue anyway** and continuing to follow the setup instructions. Any failed items should retry in the background.
- Join the *Day 1 Drop In Session*, during the scheduled time if you need further assistance.

13. Once enrollment is complete, you will be presented with the Windows sign in screen. Enter your **work email address** and **Okta password** you set up during initial setup.



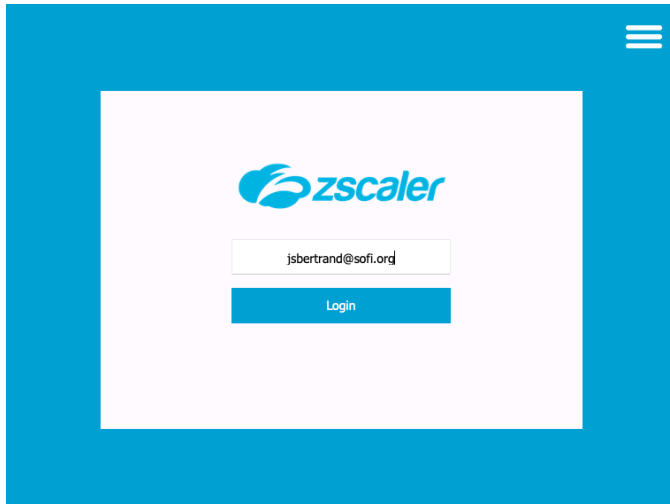
- Remember your email address is your **username@sofi.org** OR **@galileo-ft.com**
14. If successful, your profile will begin to be set up. This will take a few minutes and afterwards you will arrive at the desktop.



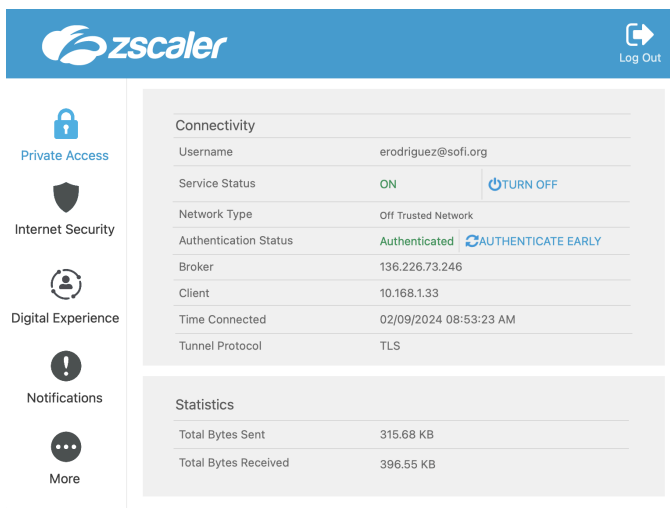
Zscaler VPN Connection

Zscaler is our VPN client. You will be required to maintain a consistent connection to the VPN in order to access most systems on your computer, including but not limited to, Gmail, SoFi Compass, Slack, etc.

1. Zscaler should automatically open when you sign into your desktop. If Zscaler does not appear or is showing a blank window, reference the *Troubleshooting* section beginning on *Page 15* of this guide.
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**.

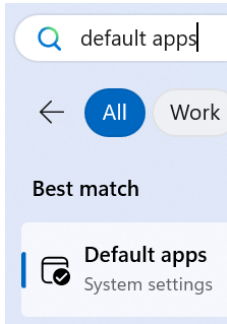


- If you receive an error stating you're 'attempting to access a restricted application' when trying to accessing or authenticating an app through Okta, we recommend the following:
 - i. Restart your browser by closing all windows, reopen, and try sign into Okta again
 - ii. Open Zscaler and reauthenticate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

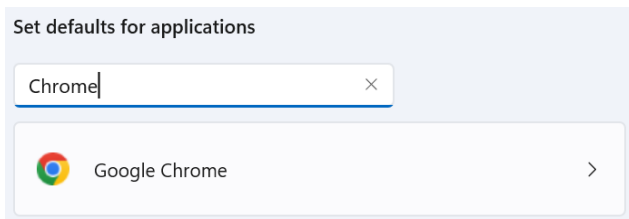
Default Browser Selection

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

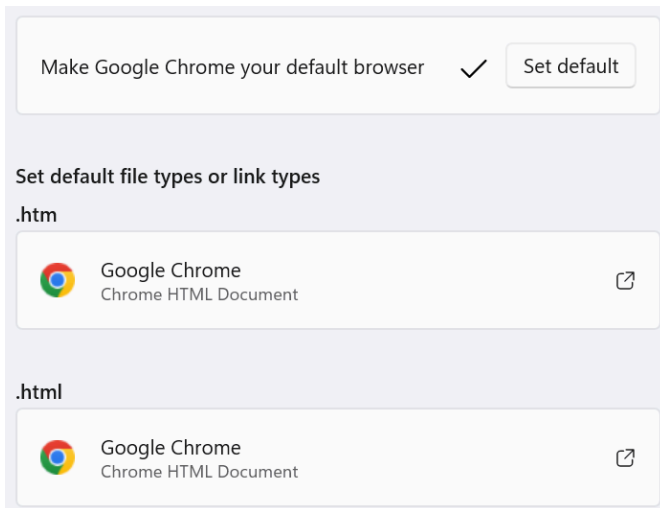
1. Open the *Start Menu*, search for and open **Default apps**.



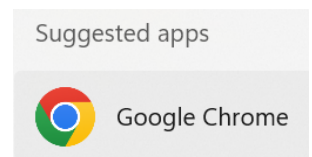
2. Under *Set defaults for applications* enter “**Chrome**” in the search box and select it.



3. Click the **Set default** button and you will see a check mark appear next to it. You will also see *.htm* and *.html* change to Google Chrome.



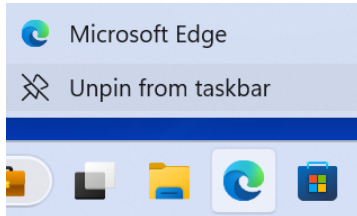
4. We recommend also setting Chrome as default for **MAILTO** and **WEBCAL**. This will ensure any email or calendar links open in Chrome. Simply scroll down, click each one, choose **Google Chrome** under *Suggested apps*, and click **Set default**.
5. The remaining items can be left as is.



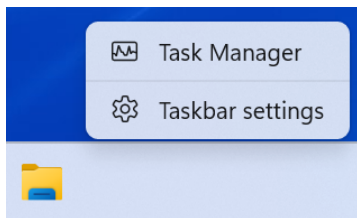
Taskbar Declutter

A number of items will show pinned to your *taskbar* by default. We recommend making the following modifications to free up the space.

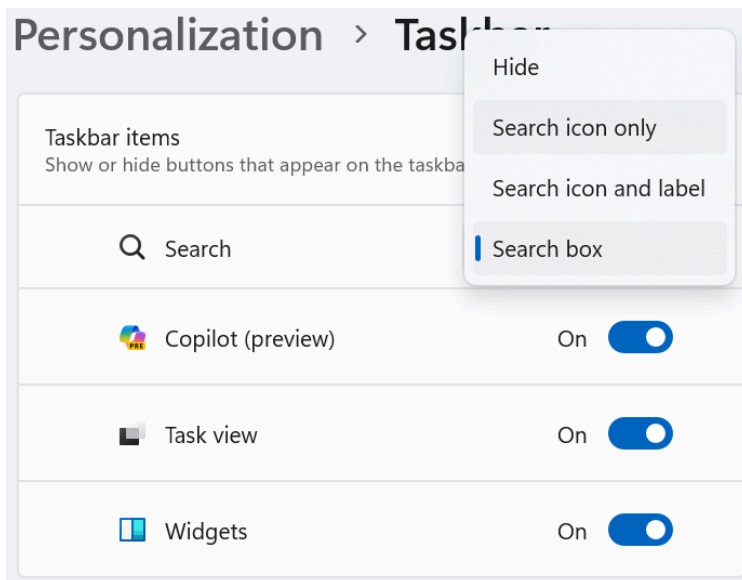
1. Right click both *Microsoft Edge* and *Microsoft Store* apps and select **Unpin from taskbar**.



2. Right-click any empty space on the *taskbar* and select **Taskbar settings**.



3. In the setting window that appears, click the drop down for *Search* and select **Search icon only (recommended)**.



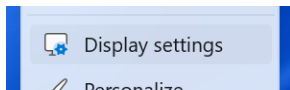
4. If you will not use them, we recommend **turning off Copilot and Widgets**.
5. **Task view** enables quick access to the Windows 11 multiple desktop functionality that may be useful, but if you do not plan on utilizing it, you can turn it off as well.

Change Display Layout

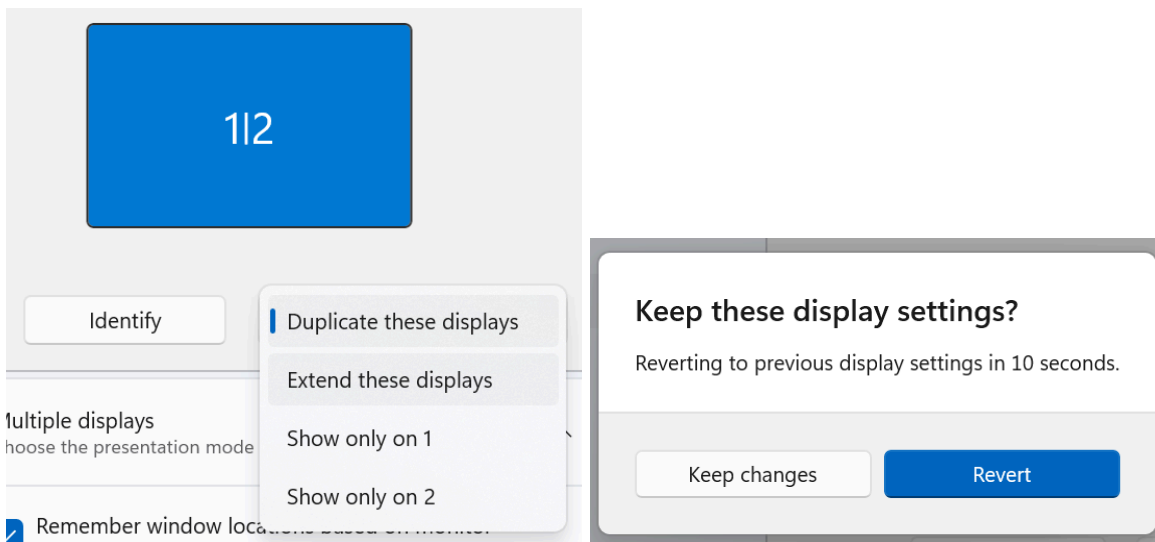
At this stage, if you've connected additional monitors you'll want to follow the steps below to ensure your displays match your physical layout when you move your mouse and windows between the displays.

Full Time Employees Only: Depending on your role and location, you may be eligible for additional at-home office equipment. This policy will be reviewed during your onboarding.

1. Right-click anywhere on the desktop and select **Display setting**.



2. By default, the displays will be duplicated. Select the drop down box that shows *Duplicate these displays* and select **Extend these displays** then select **Keep changes** when prompted.



3. You should then see your displays represented with numbers. You can identify them by clicking **Identify** and their corresponding number will appear at the bottom-left of the display.



4. The layout on screen may differ from the physical layout. For example, Display 2 is actually on the left of Display 1. To update this, simply drag Display 2 to the left of Display 1 and click **Apply**.

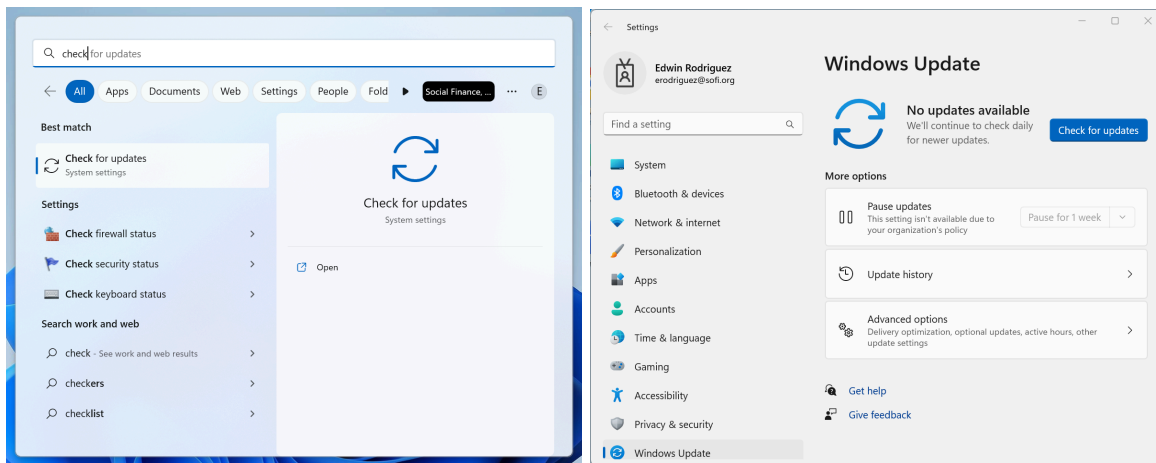
New Employee Software Setup Guide

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 Windows Updates are being installed as detailed in the next section.

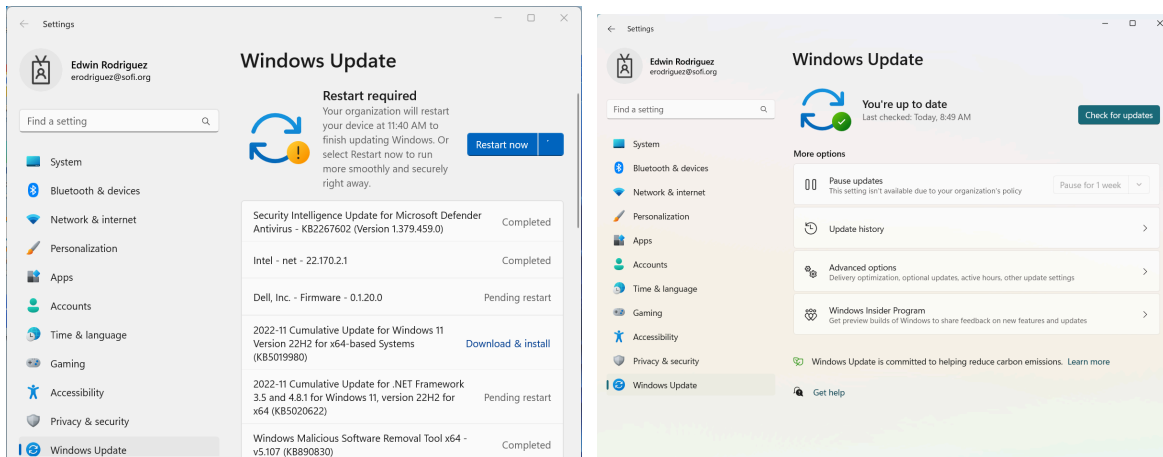
Check for System Updates

Please follow the directions below to install the latest Windows updates.

1. Click the **Start button**, begin typing **Check for updates** and open the *Systems settings* and click **Check for Updates**.

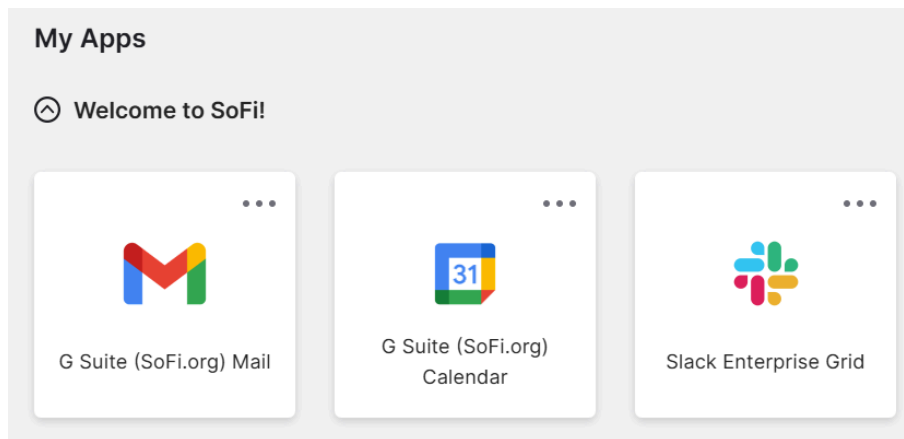


2. Once all updates are listed as Completed or Pending restart click **Restart Now**. Your computer will restart and may install a firmware update, which will take about 10 minutes. Once you're signed back in, repeat the *checking for updates* process until it displays **You're up to date**.



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.

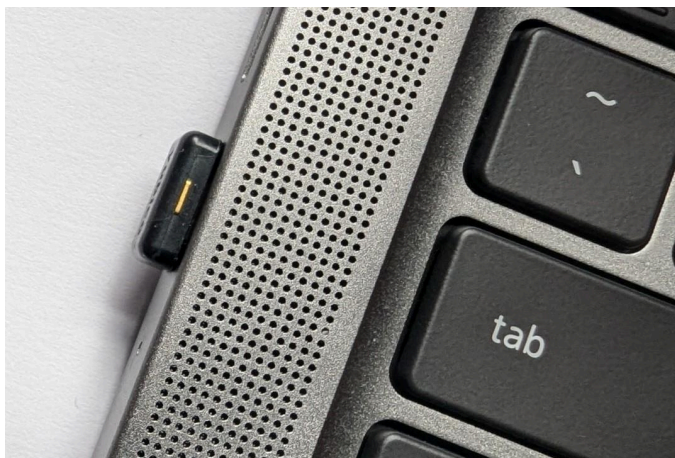
Full Time Employees Only: New to Google Workspace or Slack? Check out the New Hire Checklist that will be emailed to your work email on the morning of your start date. Included here are recommended (free) LinkedIn Learning courses to help you optimize your productivity and get started with Google Workspace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



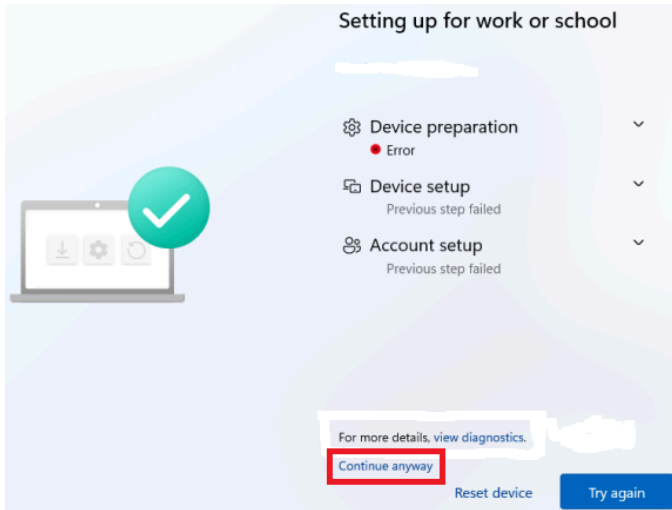
Did Not Receive YubiKey

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.

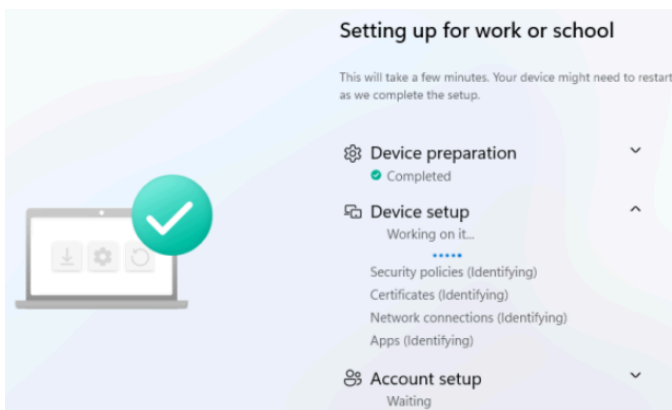
Received Error During Device Enrollment

Occasionally, device enrollment will fail due to an unforeseen issue such as a server outage, network interruption, or application issue. **Do not RESET DEVICE or TRY AGAIN** as this will wipe the device and start the configuration process from scratch, which can take a significant amount of time. Proceed by clicking **Continue anyway** and continue to follow the setup instructions. Any failed items should retry in the background.



Device Enrollment Taking Longer Than Expected

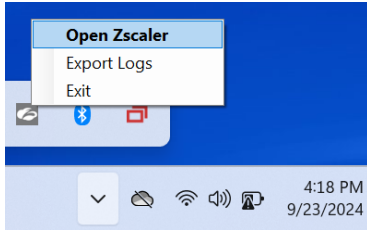
Sometimes device enrollment can take longer than expected due to trouble connecting to the server or deploying an application or setting. Usually it will finish, but if enrollment gets stalled on an item for 30 minutes, it will time out and show an error. If an error occurs, you'll want to click **Continue anyway** as detailed above under *Received Error During Device Enrollment*.



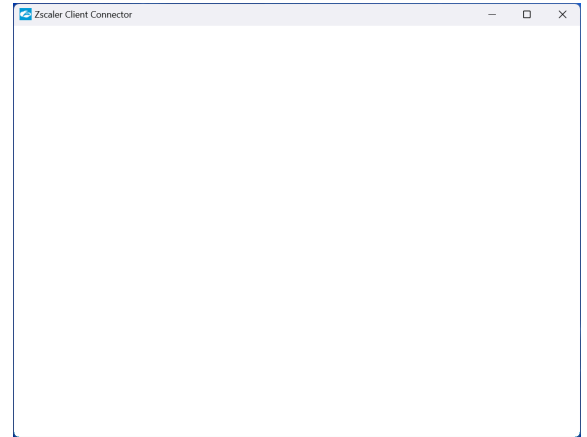
Zscaler Showing Blank Window

If Zscaler shows a blank window, you just need to close it and reopen the sign in the window.

1. Click the arrow to expand the notification area near the clock at the bottom left.
2. Click the Zscaler icon and select **Open Zscaler**.



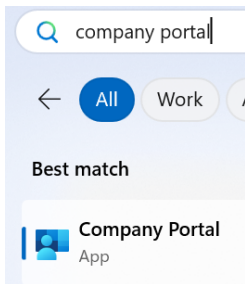
3. You can then proceed with signing into Zscaler.



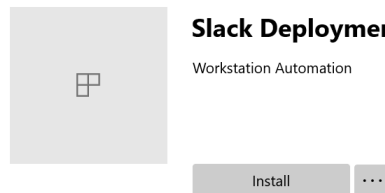
Install Missing Apps from Company Portal

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

1. Open the *Start Menu*, search for and open **Company Portal**.



2. Once open, click the search icon at the top left and search for the missing application. You can select it and click **Install** or **Retry**.

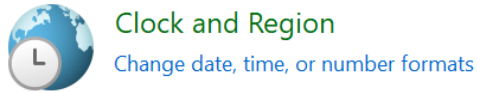


3. Once installed you should be able to open the application.

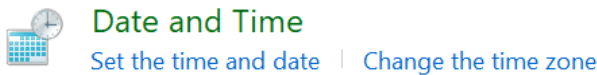
Time Zone is Incorrect

Your computer should automatically detect what time zone you are in. If it does not, see the instructions below for manually changing it from the *Control Panel*, not *Settings* as it will be locked there.

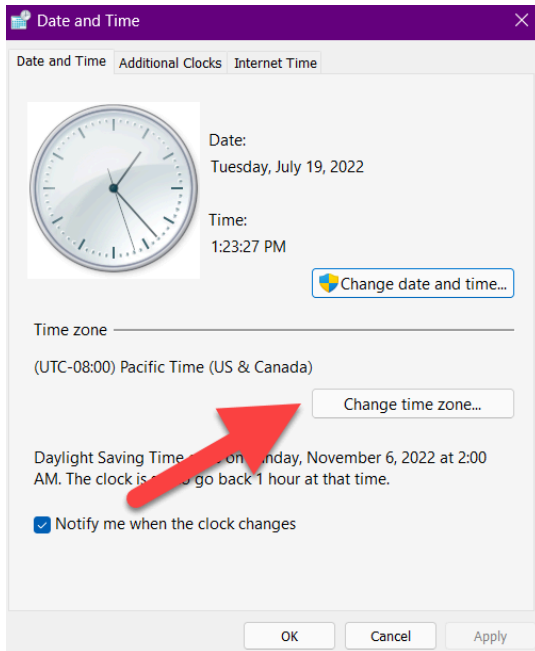
1. Open the Start menu, search for and open the **Control Panel**.
2. Click **Clock & Region**.



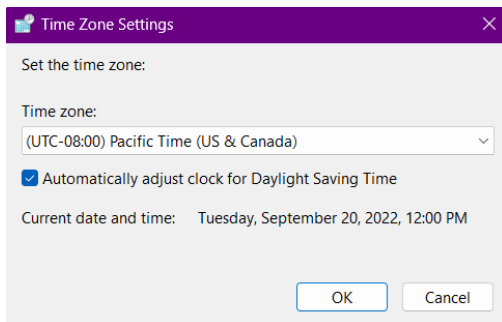
3. Then click **Date and Time**.



4. In the Date and Time window (*show to the right*), under Time zone, click **Change time zone**.



5. Locate and select your time zone and click **OK** and your clock should be corrected.



Windows Updates Are Failing

Most updates should be installed when the device is pre-configured by our vendor. Sometimes when this is done Windows does not initially recognize that the updates have been applied and tries to start installation. Unless it appears to be causing issues, this issue can be ignored as it will typically resolve itself within a couple of days.

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.