

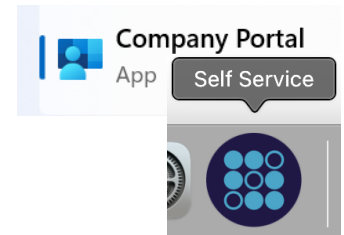
New Employee Software Guide

This guide will walk you through signing into the base applications on your computer. Please make sure to follow the directions carefully to ensure everything is signed in properly.

Missing Applications

If you have any missing applications, you can install them by opening your device's self service portal.

- **On Windows**, it is called **Company Portal** and can be opened by searching for it in the *Start Menu*.
- **On macOS**, it is called **Self Service** and can be launched from your dock or by searching for it using *Spotlight* (the name of macOS search function). You can open *Spotlight* by pressing **command + space bar** on your keyboard or clicking the magnifying glass on the menu bar at the top right of your screen.



Zscaler VPN Connection

Before you can proceed with signing into any applications, you will need to sign into Zscaler. You should have done this already as detailed in the computer setup guide for specific device type. **If not, refer to that document before proceeding.**

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 (Windows) or Safari (macOS). You should have done this already as detailed in the computer setup guide for specific device type. **If not, refer to that document before proceeding.**

Google Chrome & Okta Access

Signing in to Google Chrome with your Google Workspace (G Suite) account is important because it keeps your data, ie: bookmarks, history, etc, synced to your account and can be restored in the event you replace your laptop or clear your browser data.

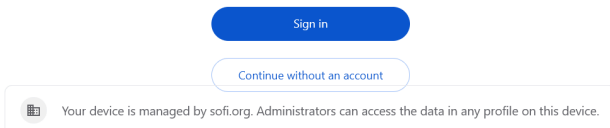
Sign In to Google Chrome

1. When you open **Google Chrome** you should be presented with the set up of a new Chrome profile. Since you have a Google Workspace account with SoFi/Galileo, click **Sign in**.

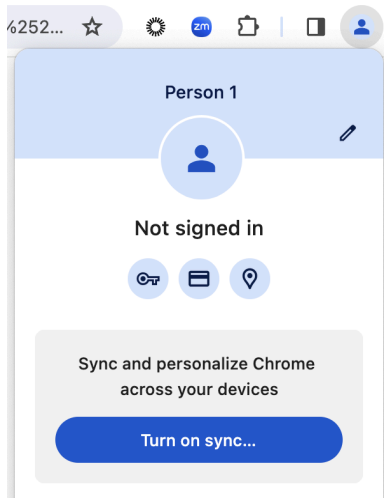


Set up your new Chrome profile

To access your Chrome stuff across all your devices, sign in, then turn on sync.



- If you do not get the page above, click the Profile menu at the top-right of your Chrome window and you should see **Turn on sync...**



2. On the *Sign in to Chrome* page, enter your *work email address* and click **Next**.

Google

Sign in to Chrome

Sign in with your Google Account to get your bookmarks, history, passwords, and other settings on all your devices

Email or phone

username@sofi.org

[Forgot email?](#)

Not your computer? Use Guest mode to sign in privately.
[Learn more](#)

[Create account](#) [Next](#)

3. You will redirect to *Okta* to sign in. Enter your *Username* and click **Next**.

Sign In

Username

Remember me


[Next](#)


4. You should then be asked to verify with a security method. You must use a combination of your **Password** and either **YubiKey Authenticator** or **Okta Verify** (get a push notification preferred). You cannot use a combination of *YubiKey* and one of the *Okta Verify*.

Verify it's you with a security method

erodriguez

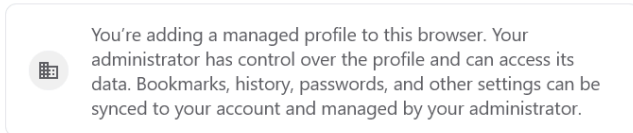
Select from the following options

 Password [Select](#)

 YubiKey Authenticator [Select](#)

5. Verify with your second security method.
 - o If you're using a **YubiKey**:

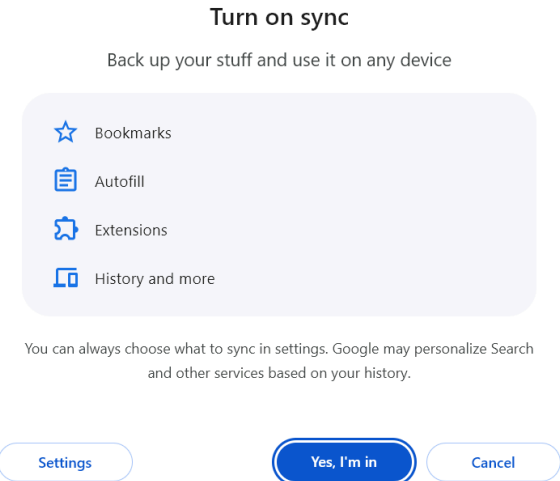
- i. make sure the cursor is in the box and touch the **gold part of your Yubikey** for a few seconds and a hidden string of characters will be entered.
 - ii. Give it about a second and a half to fully input then click **Verify**.
 - o If you're using **Okta Verify**:
 - i. Click **Send Push** and tap the notification received from Okta Verify on your mobile device.
 - ii. Tap **Yes, It's me** and tap the number that matches what is presented on your computer screen.
6. Afterwards you will receive a prompt informing you that you are adding a managed profile to the browser. Click **Add existing browser data to managed profile** and then **Continue**.




Add existing browsing data to managed profile



- o If you do not click *Add existing browser data to managed profile* Chrome will create a second profile. Reference the [*Troubleshooting*](#) section, beginning on [*Page xx*](#) of this guide to fix once you complete the following steps in this section.
7. You will then be prompted to *Turn on sync* with a summary of the items that will sync. Click **Yes, I'm in**. If desired you can customize what syncs by clicking **Settings**.




8. You should then be presented with a privacy notification that you can review. Once reviewed click **Got it**.




Enhanced ad privacy in Chrome

We're launching new privacy features that give you more choice over the ads you see.

Chrome notes topics of interest based on your recent browsing history. Also, sites you visit can determine what you like. Later, sites can ask for this information to show you personalized ads. You can choose which topics and sites are used to show you ads.









To measure the performance of an ad, limited types of data are shared between sites, such as whether you made a purchase after visiting a site.


More about ads in Chrome 

You can make changes in Chrome settings.


[Got it](#) [Settings](#)

9. Finally, you will likely see an error on the setting button at the top right of the browser. Click it and then click alert regarding the Drive extension.

TICATED      [Error](#) 

 New extension added (Application Launcher For Drive (by Google))

10. The Drive extension is not necessary so you can click **Remove from Chrome** unless you want it.

 Another program on your computer added an extension that may change the way Chrome works.

Application Launcher For Drive (by Google)

★★★★☆ (2107)

83,000,000 users

It can:

- Read and change your data on docs.google.com and drive.google.com
- Communicate with cooperating native applications

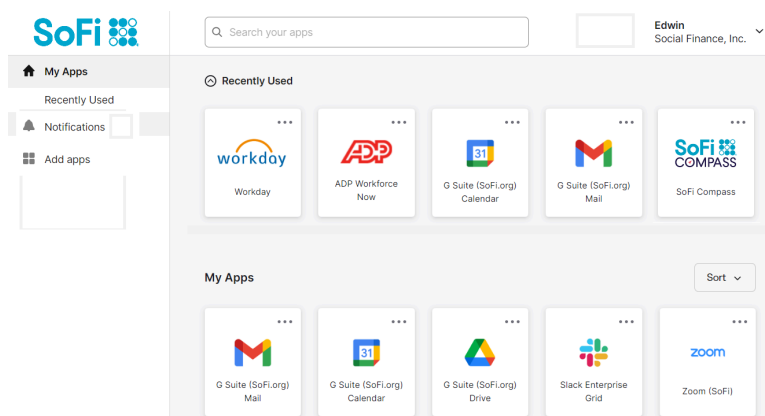
[Open in Web Store](#) [Enable extension](#) [Remove from Chrome](#)

Okta and Google Apps

Okta is our single sign-on (SSO) platform. Most of your services and applications will be accessible from or authenticated through Okta. For example, if you go to Gmail.com and enter your SoFi email address, it will recognize it as part of our SSO and redirect you to Okta to authenticate.

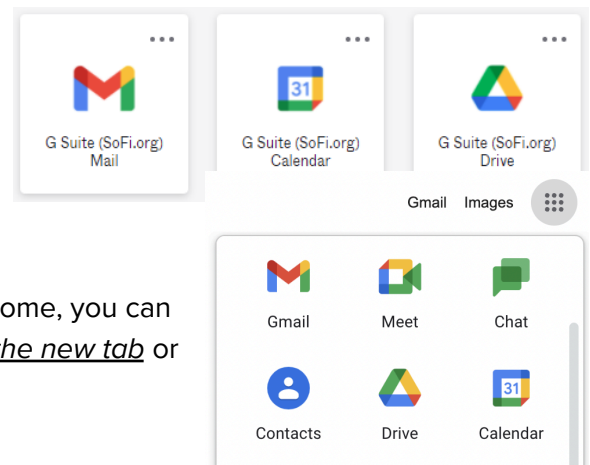
Signing in and Accessing Okta

1. Open *Google Chrome*, then open a new tab and go to **sofi.okta.com**.
2. Follow the sign-in and verification process.
3. You will then see your Okta dashboard and all of the applications and tools you have access to.



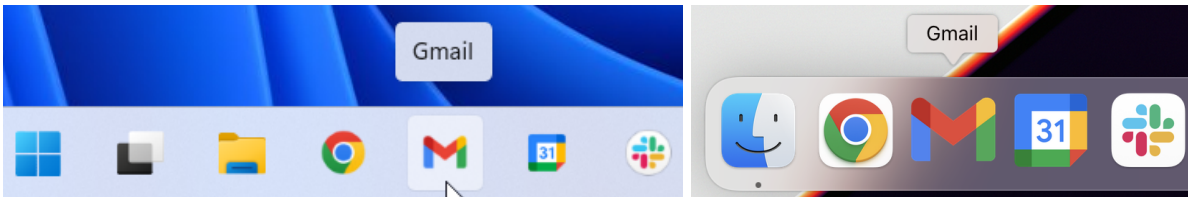
Accessing Email and Calendar

- **From Okta:** Once you're signed into Okta, you should be able to locate buttons for your email and calendar (*right image*).
- **Using web address:** In the browser enter the web addresses, as shown below:
 - www.gmail.com
 - www.calendar.google.com
- **From a new Chrome tab:** When you open a new tab in Chrome, you can quickly access them from the app menu at the *top-right of the new tab* or any Google site page (*right image*).

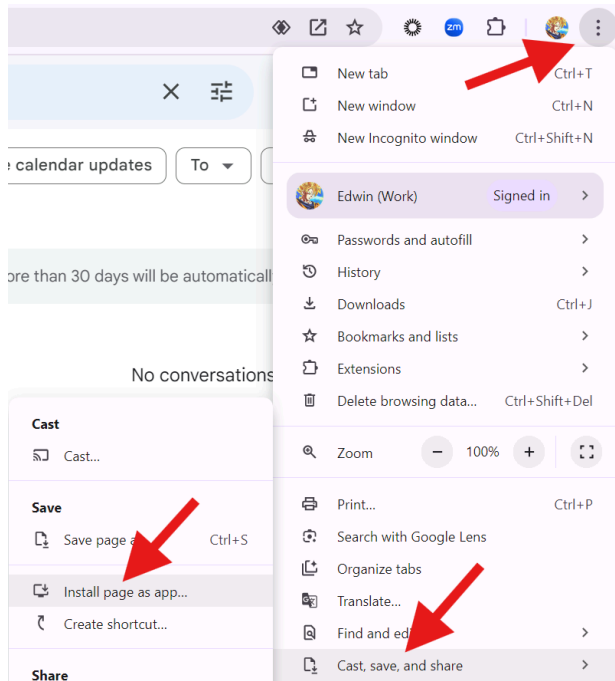


Installing Chrome Apps (Optional)

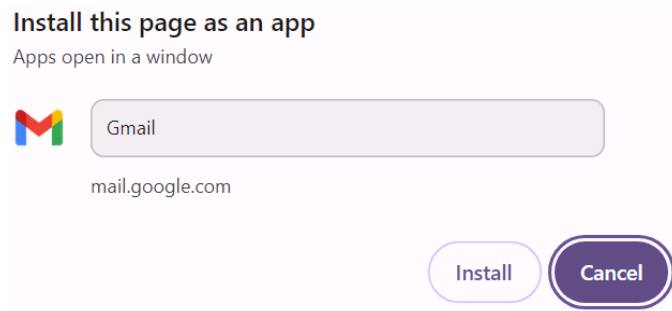
Chrome features a shortcut feature that allows you to install pages as apps to your Windows taskbar (*image 1*) or macOS dock (*image 2*) so they act as sudo-apps running in their own dedicated window.



1. Go to the page of the site you want to pin, for example Gmail.
2. While on the page, click the *Customize and controls* button at the upper-right corner of the Chrome window. Under **Cast, save, and share** select **Install page as app...**

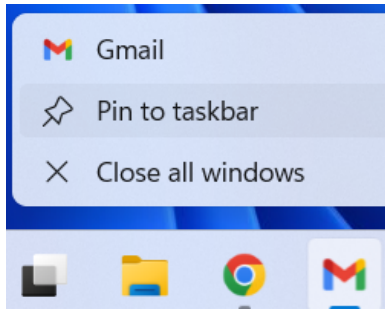


3. An install this page prompt will appear where you can click **Install**.

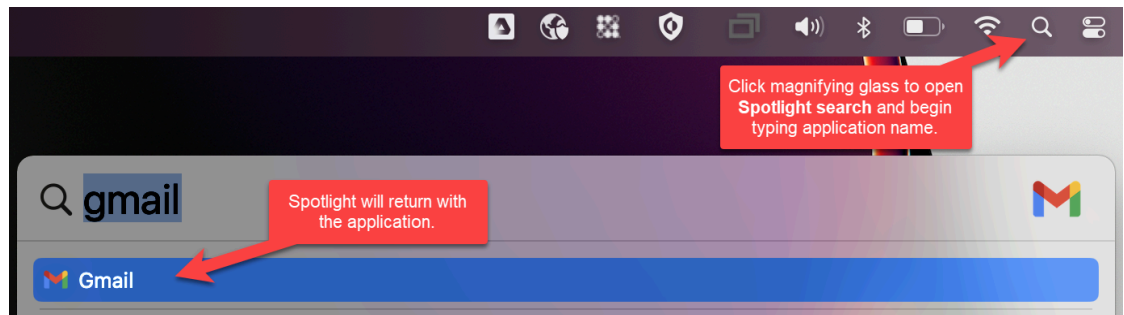


4. The site will reopen in a dedicated window and appear on your taskbar or dock.

- a. **On Windows**, right-click the icon on the taskbar and select **Pin to taskbar**. You can move it to your desired location on the taskbar.



- If the icon on the taskbar turns into a Chrome icon after pinning, close the window, right-click the icon on the taskbar and select **unpin....** Then reopen from your desktop or start menu and try pinning it again. (*This is a known bug*).
- b. **On macOS**, drag the icon over to your other pinned icons to your desired location.
- You can also launch it from *Spotlight* search or *Applications* folder.



Slack

Slack is our supported messaging platform. You will be able to contact anyone within the SoFi workspace.

Signing into Slack Desktop App

1. Open Slack on your computer, [not the web portal from Okta](#), and click **Sign in to Slack**.



2. The browser will open with sign in options. For the fastest sign in click **sign in manually** at the bottom instead of [entering your work email or clicking the Sign in with Google button](#). Then enter **sofi.slack.com** for the workspace URL and click **Continue**.

OR

name@work-email.com

Enter your workspace's Slack URL

sofi.slack.com

Sign In with Email

⚡ We'll email you a magic code for a password-free sign in. Or you can [sign in manually instead](#).

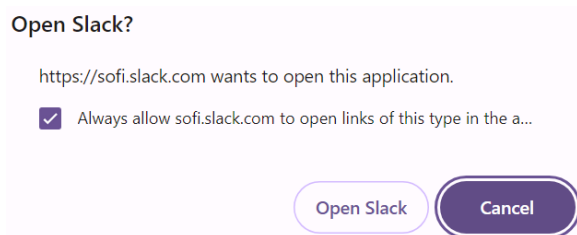
Continue

3. When shown click the **Sign in with Okta** button and It will automatically authenticate with Okta.

Sign in to Social Finance, Inc.



4. After authenticating with Okta, you will receive a prompt to *Open Slack*. Check the to **Always allow sofi.zoom.us to open links...** and then click **Open Zoom Meetings**.



- If you do not get the prompt to *Open with Slack* and open the web version. Go back to the Slack app and start the sign in process again and it should work.

Zoom Workplace

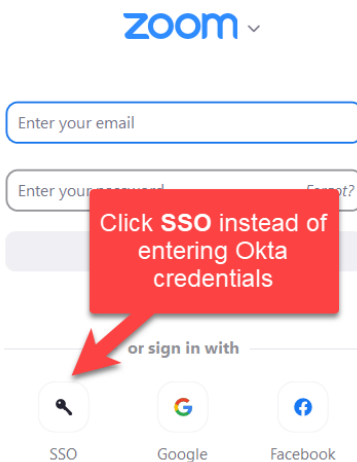
Zoom is our supported video conferencing solution. By default most new hires get a Zoom Basic account, which will limit your meetings to two participants. If more than two participants join the meeting, it will automatically be limited to 40 minutes. If you will be hosting meetings regularly, you can request a license be added to your account by submitting a Zoom Account request ticket from the Freshservice Service Catalog.

Signing into Zoom Meetings Desktop App

1. Open the Zoom app from your taskbar or dock, [not the web portal from Okta](#), and click **Sign In**.




2. Do not enter your email and password, instead select **SSO** at the bottom of the window.



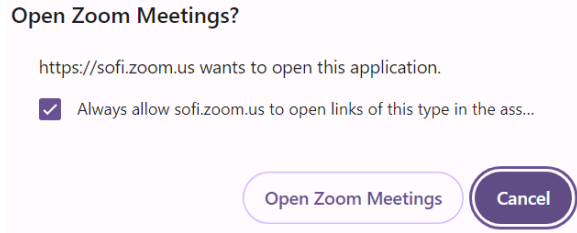
3. You will be prompted to *enter your company domain*, enter the bolded prefix below corresponding with your company below and click **Continue**.
 - o For SoFi you will enter **sofi**.zoom.us.

Your company domain .zoom.us ▾

- For Galileo you will enter **galileoft.zoom.us**.

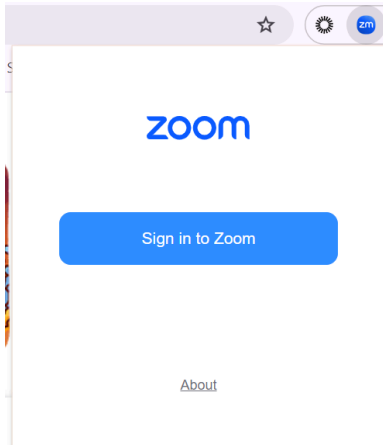
A screenshot of a web form input field. The field is labeled "Your company domain" in blue text. Inside the field, the text "galileoft" is entered, and ".zoom.us" is selected from a dropdown menu on the right side of the field.

4. After authenticating with Okta, you will receive a prompt to *Open Zoom Meetings*. Check the to **Always allow sofz.zoom.us to open links...** and then click **Open Zoom Meetings**.

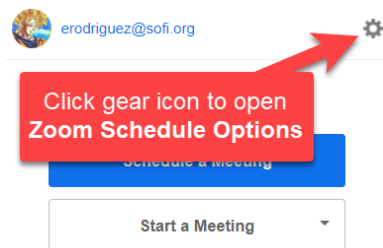


Signing into the Zoom Chrome Extension

1. In Google Chrome you should see the *Zoom Chrome Extension* at the end of the url bar. If you do not see it, click the extensions icon (puzzle piece) and you should see it.
2. You can click the pin icon to pin it as shown below. Click the extension and select **Sign in with Google**.



3. It should automatically authenticate and sign in. If you receive a login page instead. Go to sofi.okta.com and click the Zoom app. This will ensure you are signed into and then attempt again from the extension.
4. If you get a window saying it's loading but doesn't sign you in, quit Chrome and reopen it and try again.
 - o **On Windows**, you need to make sure all Chrome windows are closed, including any pages you installed as apps.
 - o **On macOS**, you can press and hold **command + Q** to quit.
5. Once signed in, click the Zoom extension again and then click the **gear icon**.



6. Scroll down to the bottom of the *Settings* page and check the box for **Allow me to specify schedule options each time** and click **Save**. This will ensure you receive the options window when creating a meeting in Google Calendar.

Allow me to specify schedule options each time

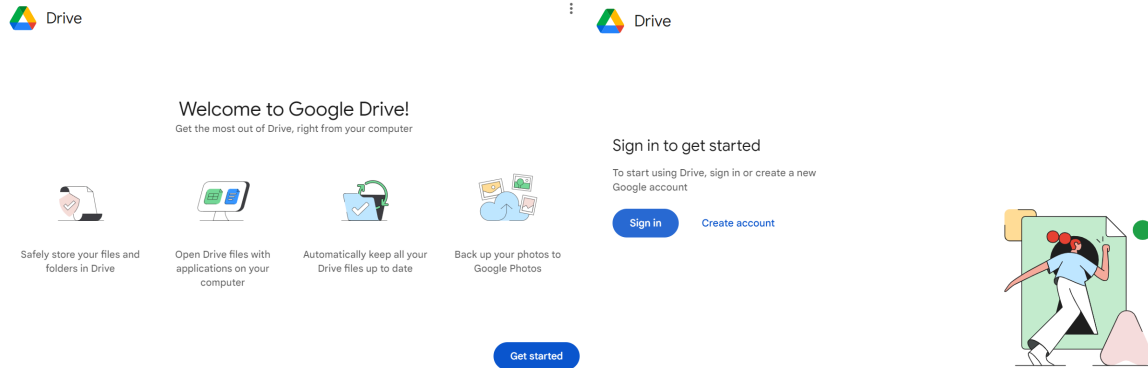
Save

Cancel

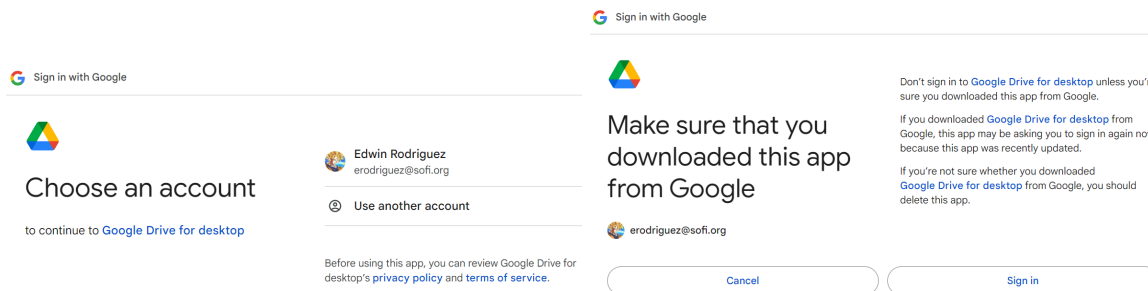
Google Drive

The Google Drive app should be installed on your computer. The app allows you to view and save any files to your Google Drive locally within your computer's file system. You can also enable syncing of other folders such as your Documents and Desktop to maintain backups without having to save or move files into the Google Drive folder.

1. Open Google Drive from your taskbar or dock and click **Get started** and then **Sign in**.



2. Chrome will open to the *Sign in with Google* page where you will select your account and then click **Sign in** on the following page.



3. You should see a success notification and the Google Drive app signing in.

Success! 

You've signed into Google Drive.

To continue, close this window and return to Google Drive.

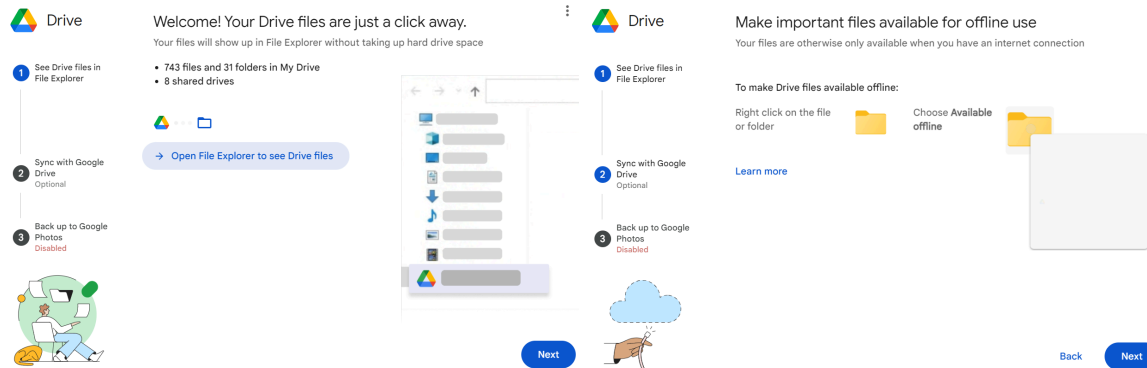


Setting up Google Drive for desktop

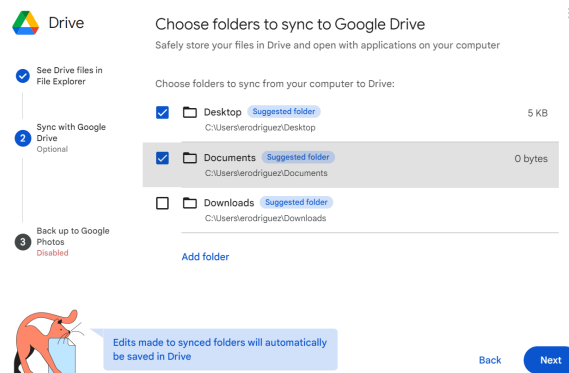
Google Drive is loading your files

- If the Google Drive app indicates that it is unable to sign in, just try again and it should work.

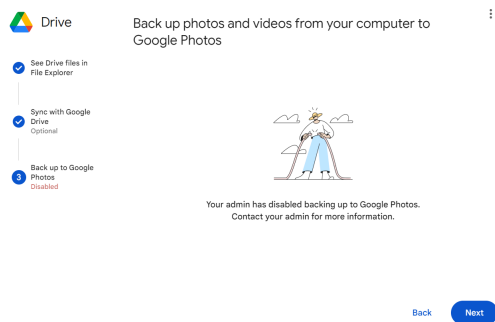
4. Once Google Drive is signed in it will provide an overview of how to use it. Click **Next** until you get to *Choose folders to sync to Google Drive*.



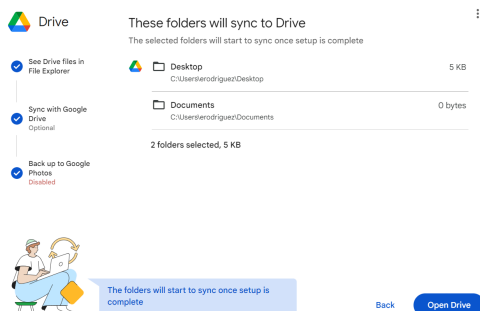
5. When you get to *Choose folders to sync to Google Drive* you can select the folders you would like to backup. Select the desired folders and click **Next**.



6. *Photo and Video* backup are disabled so when you get to that screen click **Next**.



7. The final screen will show a review of the folders you set to sync, if any. Click **Open Drive**.

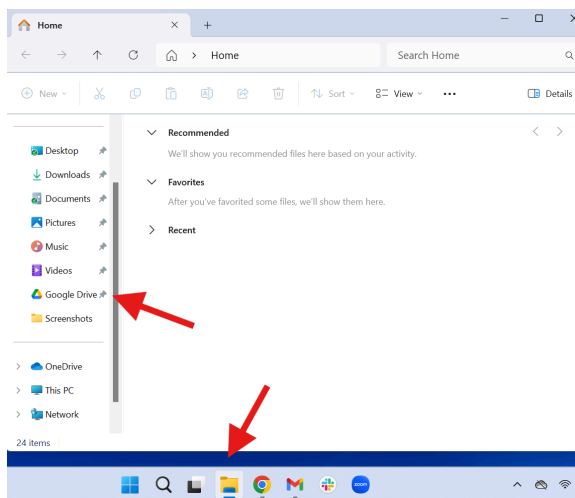


8. The Google Drive app window should appear from the icon on your taskbar (Windows) or menu bar (macOS).

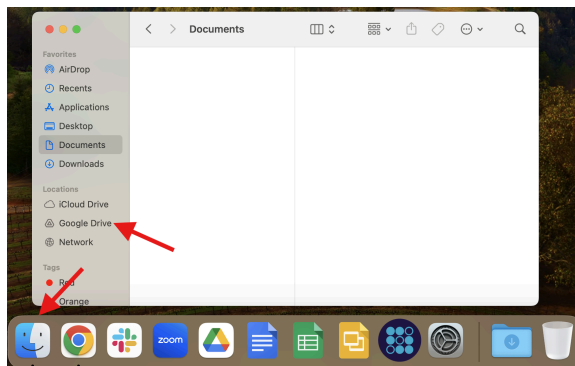


✓ Everything is up to date

9. You can access the Google Drive folder by opening the file explorer on your computer
- **On Windows**, click **File Explorer** icon on your taskbar and you should see **Google Drive** on the navigation pane to the left



- **On Mac**, click the **Finder** icon on your dock and you should see **Google Drive** on the navigation pane to the left.



Technical Support Portal

After your first day if you encounter any technical issues, you will need to submit a ticket in SoFi Compass, which can be accessed via Okta.

If you are unable to access SoFi Compass, you can call the emergency and after hours support hotline for assistance. The number is: (844) 442-5666. This phone number should also be present on the asset tag on the underside of your laptop.