

# Okta Enrollment Frequently Asked Questions



## I. What VolCorp Members Should Know About Okta

### 1. What is Okta?

In simple terms, Okta is a technology platform that will enable members to access VolCorp member resources with one login.

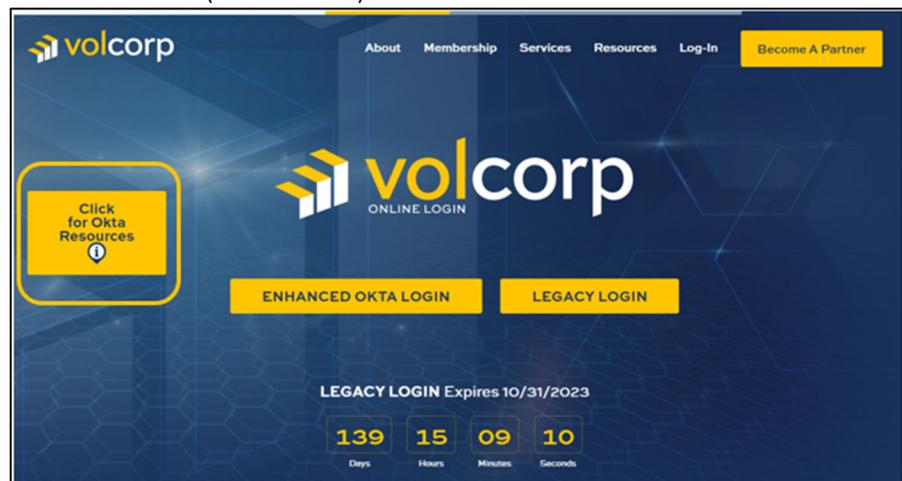
### 2. What are the benefits of using Okta?

Okta helps VolCorp streamline user management, enhance security, and improve the user experience by providing a unified platform for managing access to applications and systems.

### 3. I am having trouble registering my Okta account and/or enrolling, what should I do?

There are several step-by-step documents and other resources available online. Please reference and carefully review the resources before contacting VolCorp for additional assistance.

- i. Resources are available through a link on the VolCorp Online login page.
- ii. Click [here](#) or navigate to <https://www.volcorp.org/mfa/> and click on the Okta Resources button on the left (shown below).



### 4. How long does it take to enroll in Okta?

It should take approximately 5 to 10 minutes to completely enroll in Okta, especially if you are walking through the step-by-step tutorials for the first time.

### 5. How often will I be prompted to reauthenticate while in Safekeeping?

If there has been no activity within the site for a while, you will be prompted to authenticate.

### 6. What if I do not enroll in Okta?

If you do not proactively enroll in Okta during the enrollment period, you will no longer have access to Safekeeping once rollout is complete on June 5, 2024. You must enroll your Okta account during the appropriate enrollment period to retain access.

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### **7. What happens if I miss the 7-day activation period?**

If you click the activation link after it expires, you will be required to go through a self-guided email verification process. Even if you miss your 7-day activation period, you can and should still complete your Okta enrollment or you will lose all access to Safekeeping after the enrollment period ends. (See question #6).

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## II. Using a Mobile Device to Enroll in Okta

### 1. What do I need to do to enroll in Okta?

To enroll in Okta, you will need your work computer and a mobile device with internet or texting capability. You may also use a security key or hardware token. See question #2 for more information. You will also need the 'Welcome to Okta' email that you will receive requesting you to enroll.

### 2. What are the methods to verify Multifactor Authentication (MFA)?

- a) Through a FIDO2 compliant Security Key or Hardware Token
  - a. Click [here](#) for instructions on this option.
- b) Through the Okta Verify app (on a mobile device)
- c) Through an SMS text message (on a mobile device)
  - a. This option is *temporarily enabled* to allow for ease of Okta enrollment while your staff complete the enrollment steps for one or more of the other two preferred options listed above. **The SMS option will be removed once the Okta enrollment initiative is completed in October 2023.**
  - b. **NOTE:** If you have signed up for this option, please set up at least one other MFA option as soon as possible.

Members are required to set up at least one MFA method, but we highly recommend setting up two methods for contingency purposes.

### 3. What versions of my device are required for the Okta Verify app?

- Android
  - Versions 9, 10, 11, 12, 13
- Apple iOS
  - Versions 15, 16
- Apple iPadOS
  - Versions 14, 15, 16
- Apple watchOS
  - Versions 8 and later

### 4. What if I do not have a mobile device or am not allowed to use it while working?

Your option is to use a FIDO2 compliant Security Key. Click [here](#) for a document that explains what a security key is, what it looks like, and other key terms. This document also explains the process to set up this multi-factor authentication method.

### 5. Can I enroll in Okta from my mobile device?

We recommend initiating your Okta enrollment from a work computer. You will want to have your mobile device available during the enrollment process, but we do not recommend starting enrollment from your mobile device.

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**6. I just received a new mobile device. Do I need to re-enroll in Okta?**

Please contact support if you receive a new device to determine if re-authentication from your new device is needed.

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## III. Other Frequently Asked Questions

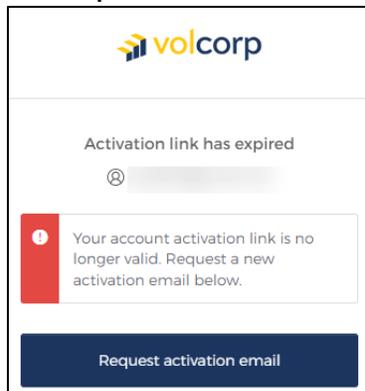
### 1. What happens if I miss the 7-day period to enroll my Okta account?

You can restart the enrollment/activation process by completing the following steps.

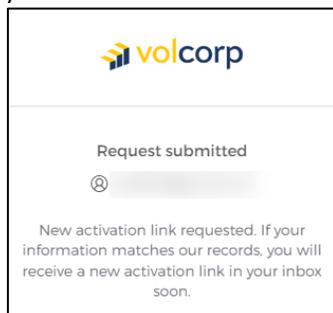
- a) Click the **Activate Okta Account** button in your original 'Welcome to Okta' email (even though the link is expired).



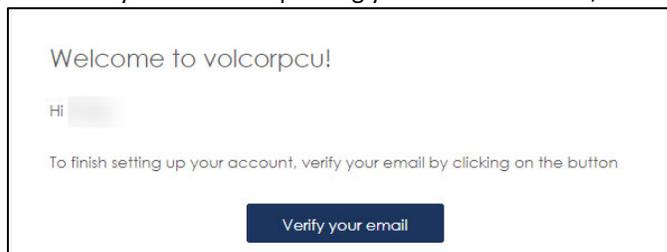
- b) Click **Request activation email**.



- c) Assuming your email address matches previous records, you will receive an email to verify your email address.



- d) In the email you receive requesting you to enroll in Okta, click the **Verify your email** button.



- e) Upon successful email verification, the enrollment process is the same. Please use the Okta resources available for assistance in completing enrollment.

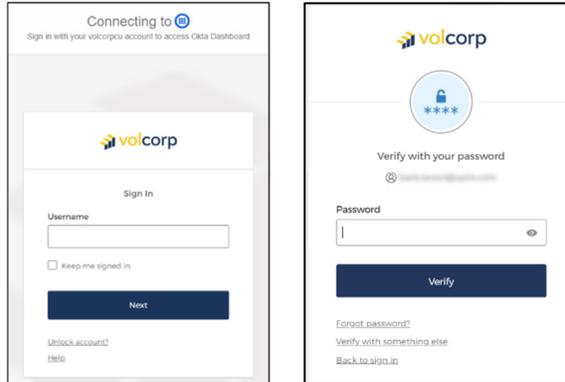
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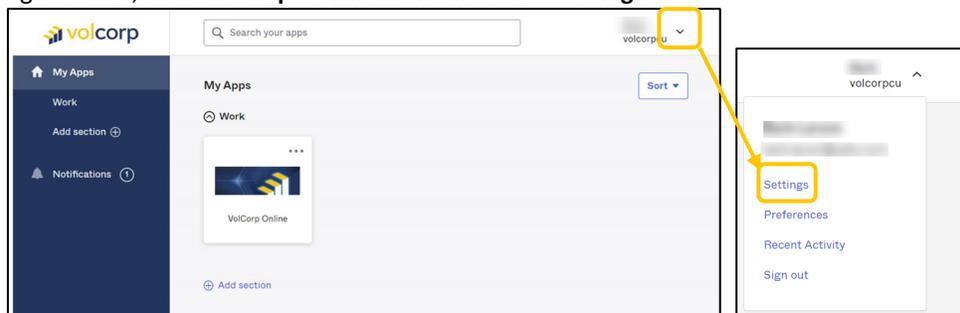
## 2. What if I lose my security key or must get a new one?

If this happens, you should remove the old security key from Okta, so Okta no longer recognizes and/or approves it as a verification method. Use the following steps to remove a security key in Okta.

- a) Go to the VolCorp Okta sign-in page: <https://volcorpku.okta.com>
- b) **Sign into Okta** with your username and password.



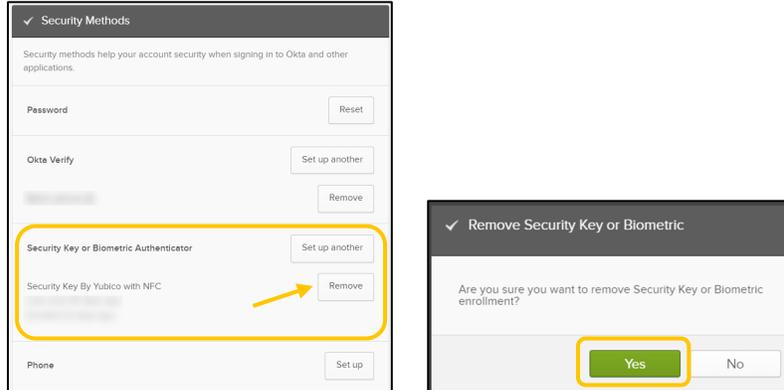
- c) You will be asked to verify your identity with an MFA method. Hopefully, you set-up more than one method during enrollment (since your security key is no longer an option). **Complete the MFA process using a different method.**
- d) Once the MFA process is complete, the VolCorp Okta dashboard page will open. In the upper right corner, click the **drop-down arrow** and select **Settings**.



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- e) In the Security Methods box, find the **Security Key** section and click **Remove** for the security key that will no longer be used. Click **Yes** to confirm.



- f) If you have a new Security Key available, click **Set up another** and go through the set-up process.



**Note:** If you need assistance setting up a new security key, resources are available. Go to the [VolCorp Online login page](#) and click on the Okta Resources box for additional assistance.

### 3. Which internet browsers are recommended?

Recommended browsers for use with Okta include the latest versions of Google Chrome and Microsoft Edge.

### 4. How does a new credit union employee gain access to Okta?

For new Okta user requests please contact VolCorp's Member Services:

- Toll free: (800)470-3444 – Option 1 for Member Services
- Local: (615)232-7900 – Option 1 for Member Services

### 5. Why did the link to Safekeeping have to change?

It will take a few months to get all our members enrolled in Okta, and we want to accommodate members with, and without Okta accounts during this timeframe. To do this, we created a temporary log-in page with these options. After the Okta rollout is complete, the temporary log-in page will be removed.

### 6. Do I need to update my shortcuts or bookmarks to the Safekeeping login page?

Yes. If you created a shortcut or bookmark to the Safekeeping login page prior to June 5, 2024, it must be updated to the new address of the temporary login page: <https://www.volcorp.org/mfa/>.

### 7. What if I have reviewed all the resources and the FAQ and I am still stuck?

Additional help is available by emailing [oktasupport@volcorp.org](mailto:oktasupport@volcorp.org). In the email, please provide the following details so we may efficiently respond to your request.

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- Copy and paste the following into an email to complete:
  - First and Last name:
  - Name of credit union:
  - City and State:
  - Routing/Account #:
  - Which of the 3 authentication methods you are having issues with (if applicable):
    - Okta Verify app
    - SMS Text
    - Security Key (for example, Yubikey, etc.)
  - If you are using a mobile device, what kind of device are you using?
    - Type of mobile device: (iPhone, Android, etc.)
  - Be as specific as possible about what is not working or where you are stuck.
    - Specific Issue:
  - Share specific verbiage about any error messages you may be receiving.
    - Verbiage in error messages:
    - Origination of error messages: (i.e., computer, phone, etc.)

## **8. If I have other general questions, what do I do?**

Contact VolCorp for general questions or issues.

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- Local: (615)232-7900 – Option 1 for Member Services