

New Hire Orientation

Information and Security – IT Operations



Security

Supports the operation and security of eMoney's network.

- Anti-Virus
- Email Filtering
- Intrusion Prevention
- Data Loss Prevention
- Firewall Management



Product Operations

Provides external technical support for client-facing platforms.

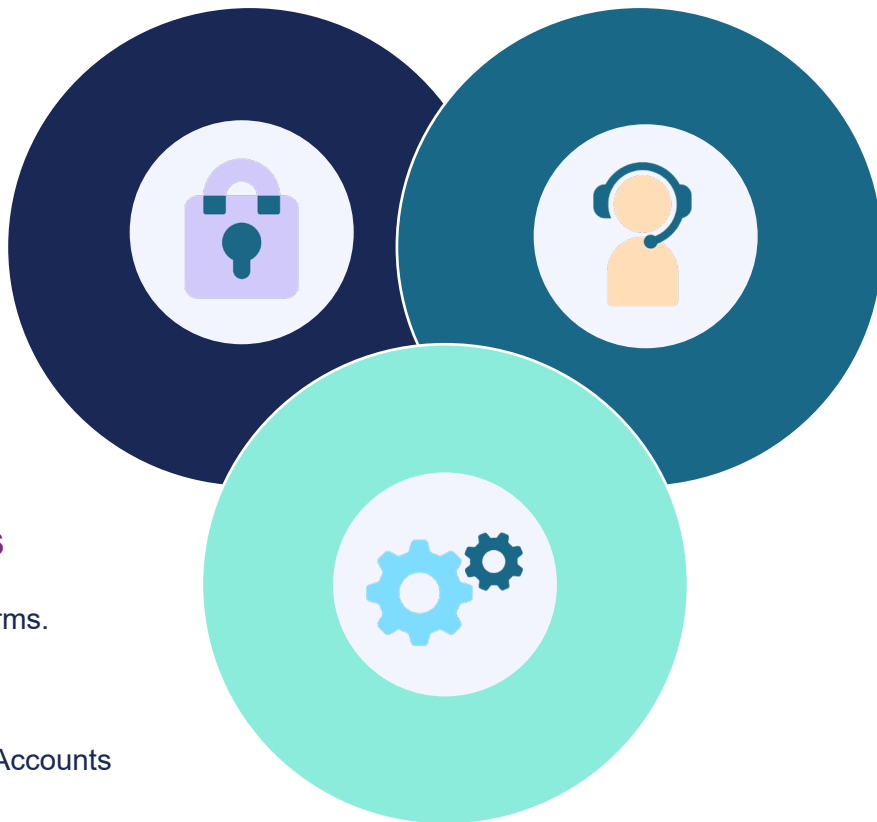
- LBS
- EMA
- NEXUS
- DMZ and EMAPLAN User Accounts
- Production SQL



Corporate Operations

Provides internal technical support for eMoney employees.

- Mobile Devices
- Virtual Desktop
- Desktops & Laptops
- Internal Applications
- Conferencing Systems



Keeping Data Secured

All employees and contractors are responsible for protecting eMoney's information and systems from cyber security threats.

- Application security
- Policies and procedures
- Personnel management
- Antivirus and firewall
- Encryption
- Audit compliance
- Contractual obligations

Security questions or concerns? Email Security@emoneyadvisor.com



Tips to Help eMoney Stay Compliant

ALWAYS lock your computer when you are away from your desk

- **Keyboard Shortcut:**



NEVER share your passwords or write them down

- **Utilize KeePass** – A password storing application available in Software Center

Equipment

All full-time employees will receive:

- 1 Monitor
- Headset
- Wireless Keyboard/Mouse Set
- USB-C Hub
- Additional Display Cables
- Power Strip

Please allow up to 1 week after your first day to receive all equipment!



| Logging into Your eMoney Laptop

Your First Time Logging In

eMoney Username: first initial + last name

ex: jsmith

Password: eMoneyNewHire2026!

Note: Your password will be changed once connected to internal network.

Once successfully logged in, connect to Wi-Fi. Please ensure that your laptop has established a connection to a secure Wi-Fi network.



Connecting to VPN

VPN (Virtual Private Network)

VPN allows you to create a secure connection to eMoney's internal network.

- **Full-time employees** connect to **EMA VPN**
- **Contractors** connect to **EMA VPN HUB**

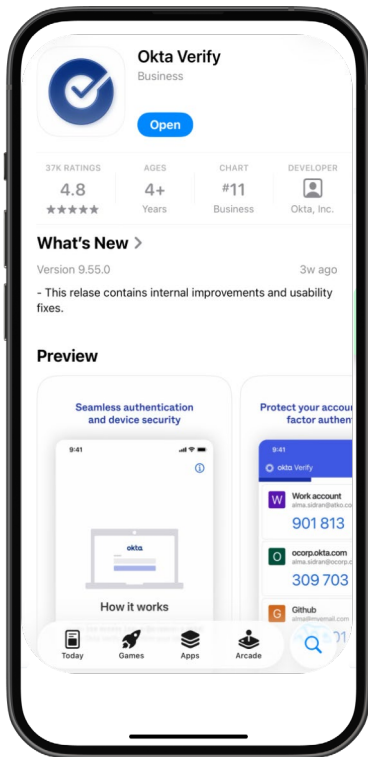
Important Notes:

- eMoney internal applications will not be accessible unless connected to VPN.
- Internet connection is required to connect to VPN

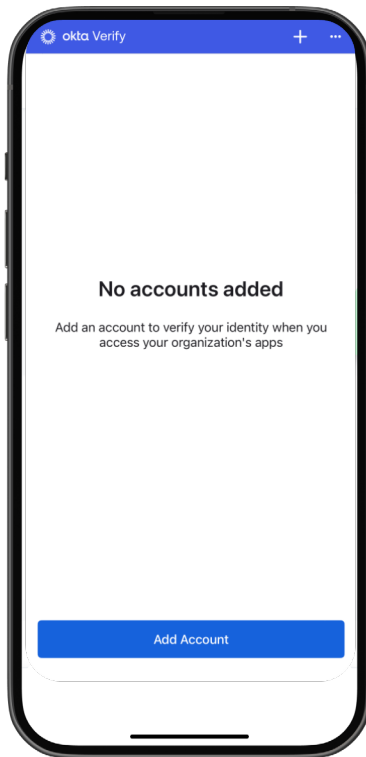


Okta Verify – Multifactor Authentication Setup

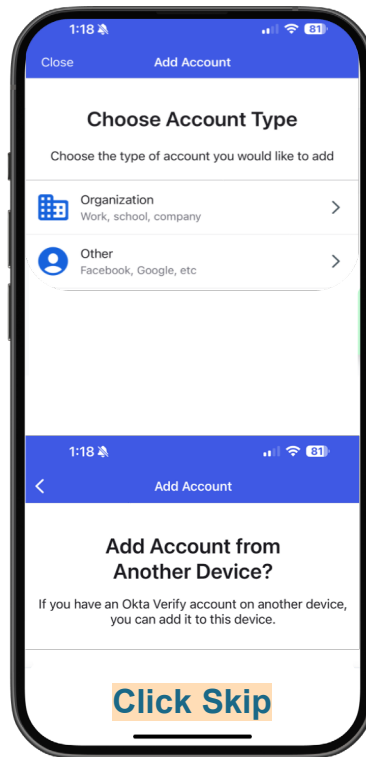
Install the **Okta Verify** app on your mobile device



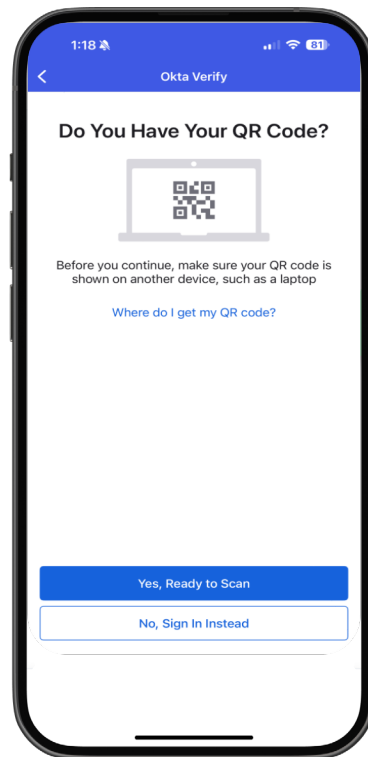
Click **Get Started > Next > Add Account**



For Account Type choose **Organization**



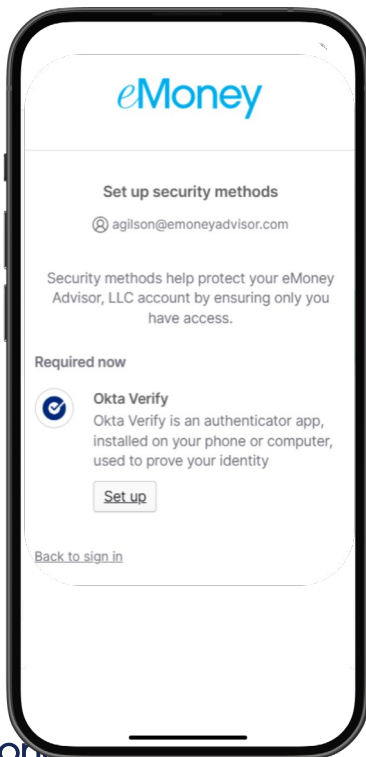
Click **Yes, Ready to Scan**



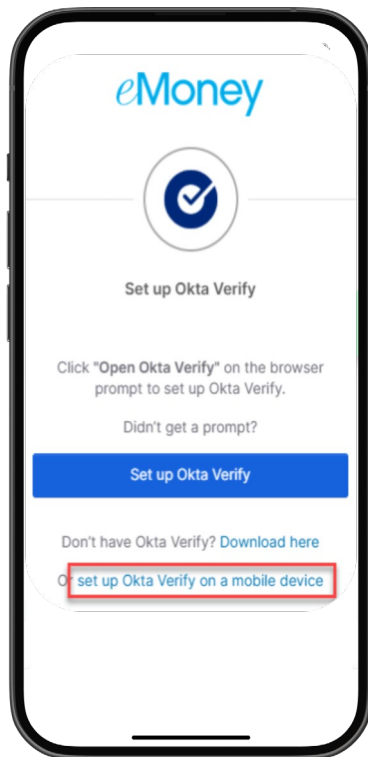
Okta Verify – Multifactor Authentication Setup

Laptop
emoneyadvisor.okta.com

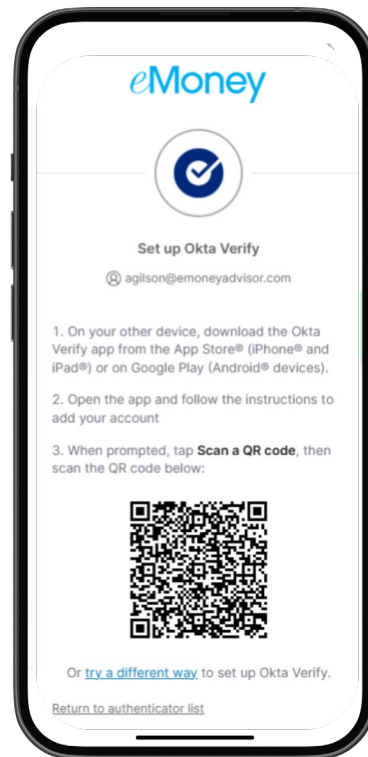
Visit Okta and the prompt below will appear



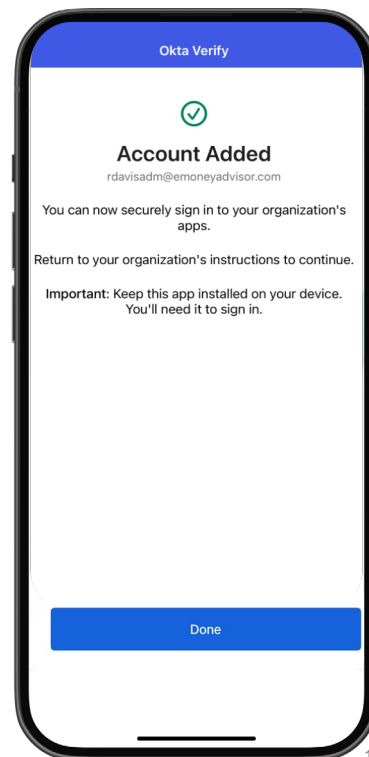
Click **Setup Okta Verify** on a Mobile Device



Allow camera access in Okta Verify, then scan the QR code on your laptop



Click **Yes, Ready to Scan**



Connecting to VPN Using Okta Verify

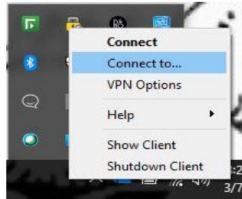
Click on the **Show Hidden Icons** arrow in the lower right corner of your screen (near you date and time)



Right click on the **Checkpoint Endpoint Security** icon (looks like a lock)



Click **Connect to...**



Make sure your **Site** is set to **EMA VPN**

Endpoint Security

Site: EMA VPN

Authentication

Please provide a user name and password to authenticate

Username: ltnisner

Password: Windows Password

Connect Cancel Help

eMoney



Did You Just Try to Sign In?

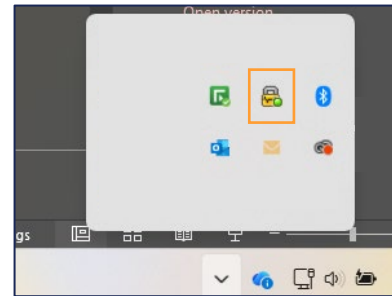
Havertown, Pennsylvania, United S...
[More Info](#)

Just now

On your mobile device,
open the Okta Verify
app and select
“Yes, It’s Me”

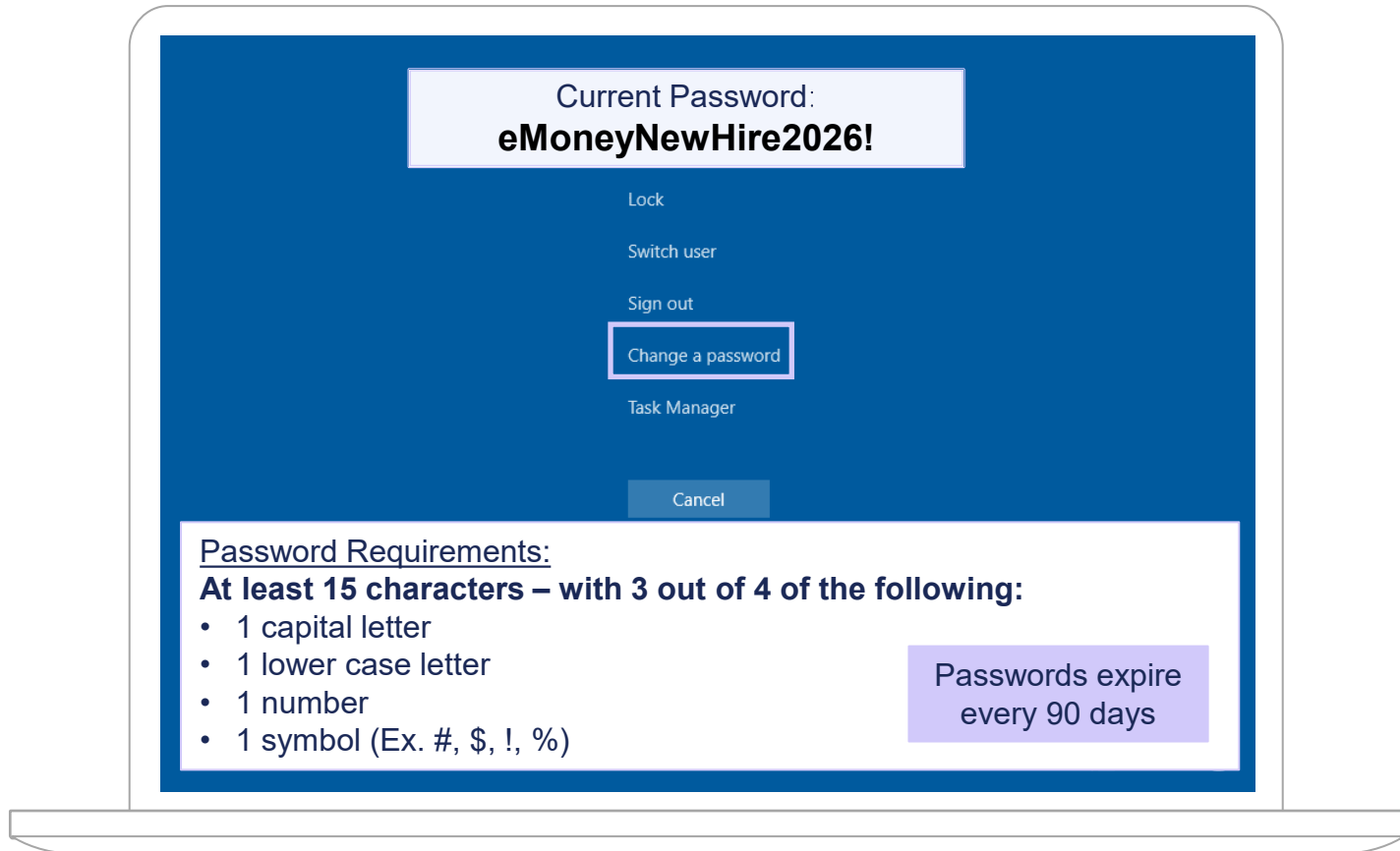
Yes, It's Me

No, It's Not Me



Connection
Successful!

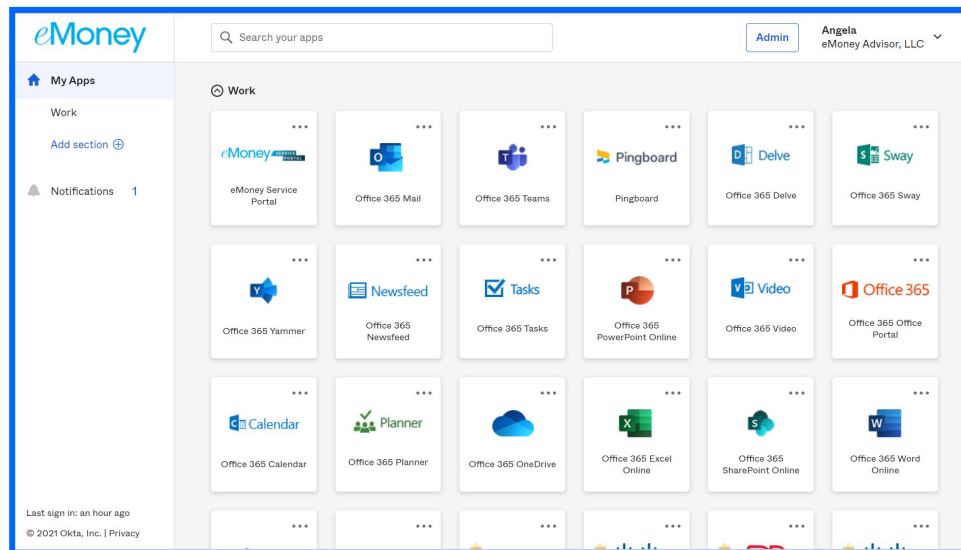
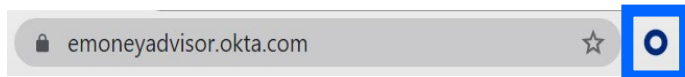
Changing Your Password (Always on VPN)



| Internal Applications

Accessing Internal Applications

1. Most applications are accessible through Okta, our single sign-on hub
2. <https://emoneyadvisor.okta.com>
3. Easily access your Okta account via the Okta Browser Plugin by clicking the little blue circle icon located at the top right of your browser



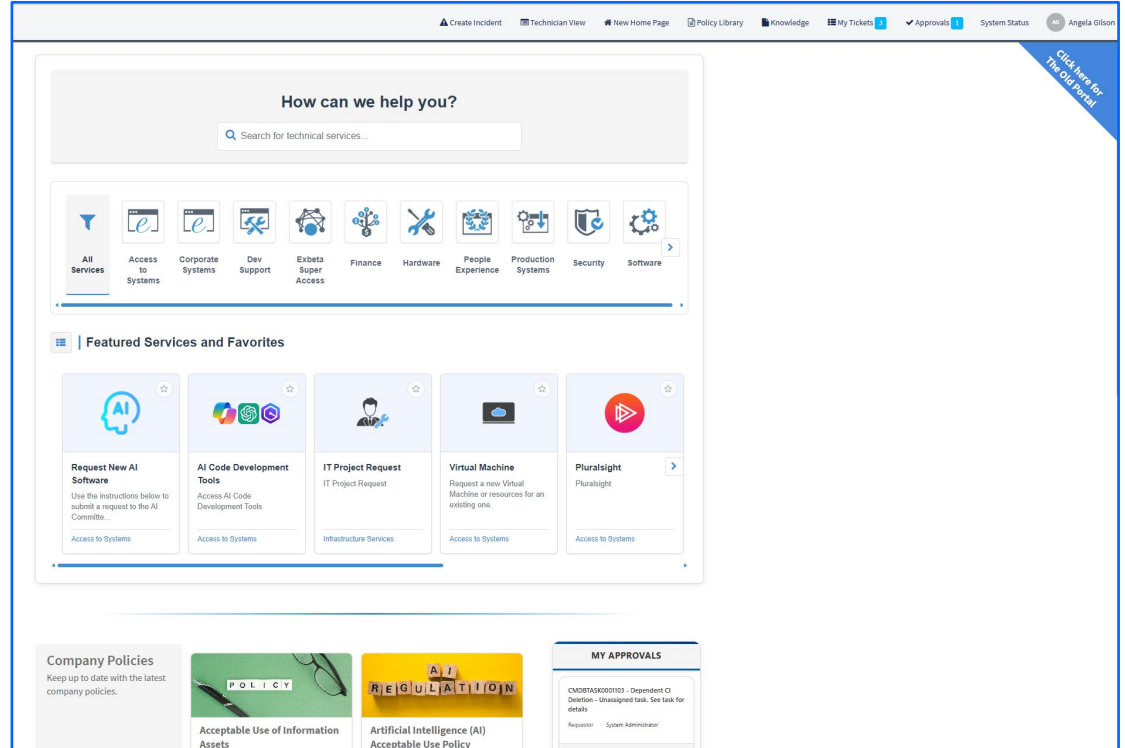
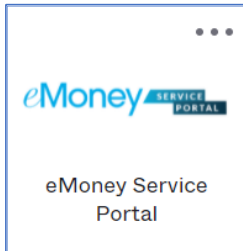
Service Portal

eMoney's Service Management Platform

Employees can submit tickets for:

- Software
- Hardware
- Access
- Report a break/malfunction
- People Experience (HR)

Okta Tile



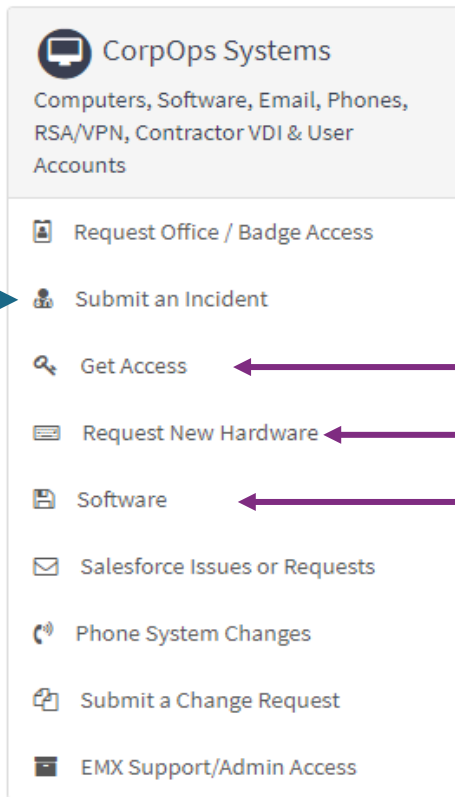
Incident vs Request

Incident

Something's broken and I need it fixed so that I can get my work done.

Incident Examples:

- Monitor is not working
- My laptop's performance is poor and negatively affecting productivity
- Unable to connect to network



Request

I need something that I currently do not have to more effectively perform my job duties.

Request Examples:

- I'd like a Webcam
- I need access to a space in Confluence
- Add/remove users from email distribution group

Knowledge Base

Database of articles that provide in-depth information, FAQs, and troubleshooting guides on common issues and topics.

[Home](#) > [Knowledge Base](#)

Categories

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How to Connect to SSL VPN from a Windows Computer

★★★★★

eMoney Advisor Employee Handbook

★★★★★

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👁 19 Views

Educational-Assistance-Policy

👁 15 Views

People Experience Data Privacy Policy

👁 7 Views

How To Login to Your New Laptop

👁 4 Views

eMoney

Service Portal Policy Library

You Have Documents Waiting For Your Acknowledgment.

Travel and Expense Policy

The purpose of this policy is to provide employees with rules and regulations related to business travel and expense. This policy establishes responsibilities, use of preferred providers, authorization limits and use of the corporate card, expense...

[Read and Accept](#)

eMoney Advisor Employee Handbook

Welcome to the eMoney Employee Handbook! Whether this is your first day or you are returning for a quick refresher, we hope this handbook answers your questions. If not, you're always welcome to reach out to a member of the People Experience...

[Read and Accept](#)

Employee Name and Likeness Policy INTERNAL

I, as an employee ("Employee") of eMoney Advisor, LLC or its affiliates and subsidiaries ("eMoney" or "Employer"), hereby consent, permit, and irrevocably authorize eMoney and its assigns, to use, separately or together, my name, voice, picture...

[Read and Accept](#)

eMoney Advisor Privacy Policy

eMoney Advisor, LLC ("eMoney" or "Company") has adopted this Privacy Policy (this "Policy") governing the processing, collection, use, and retention of Personal Data. Information is one of our most important assets, and it is everyone's...

[Read and Accept](#)

eMoney Advisor Acceptable Use of Information Assets Policy

eMoney Advisor, LLC ("eMoney" or "Company") has adopted this Policy (this "Policy") for establishing the acceptable use of all eMoney technology. eMoney's Information Security Policies are based on our own Information Security Framework, which...

[Read and Accept](#)

eMoney Advisor DISC Policy

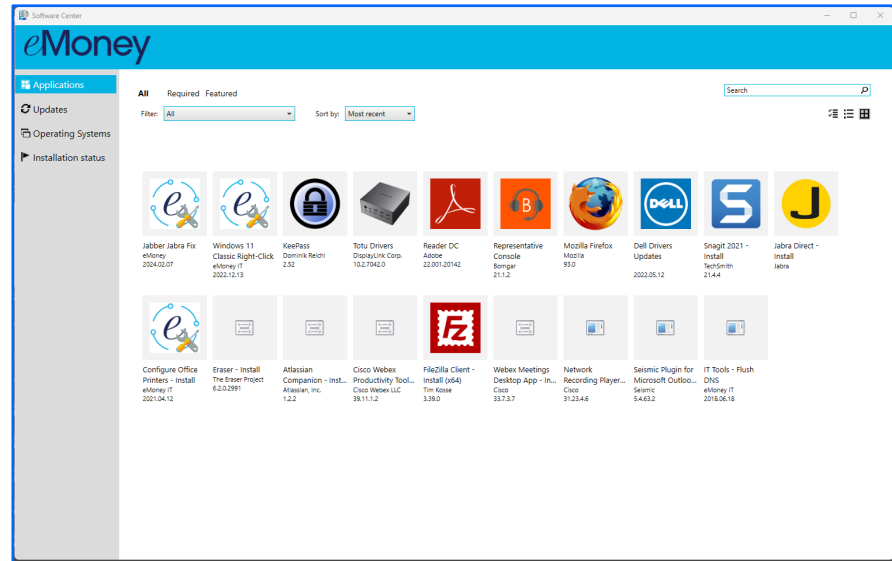
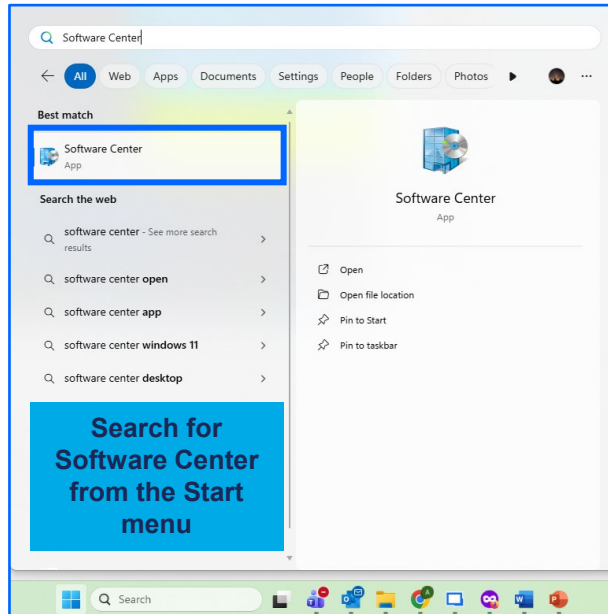
The Digital Information Security and Confidentiality Policy (DISC) is a critical component of eMoney Advisor, LLC's information security management, ensuring the preservation of confidentiality, integrity, and availability of all physical and...

[Read and Accept](#)

Be sure to read and accept all policies assigned to you as soon as possible!

Software Center

Software Center allows you to install software as needed. If on a Mac, this is the **Self-Service Center**



Video Conferencing



**Collaborative
Internal Meetings**



**Midsized internal &
external meetings**

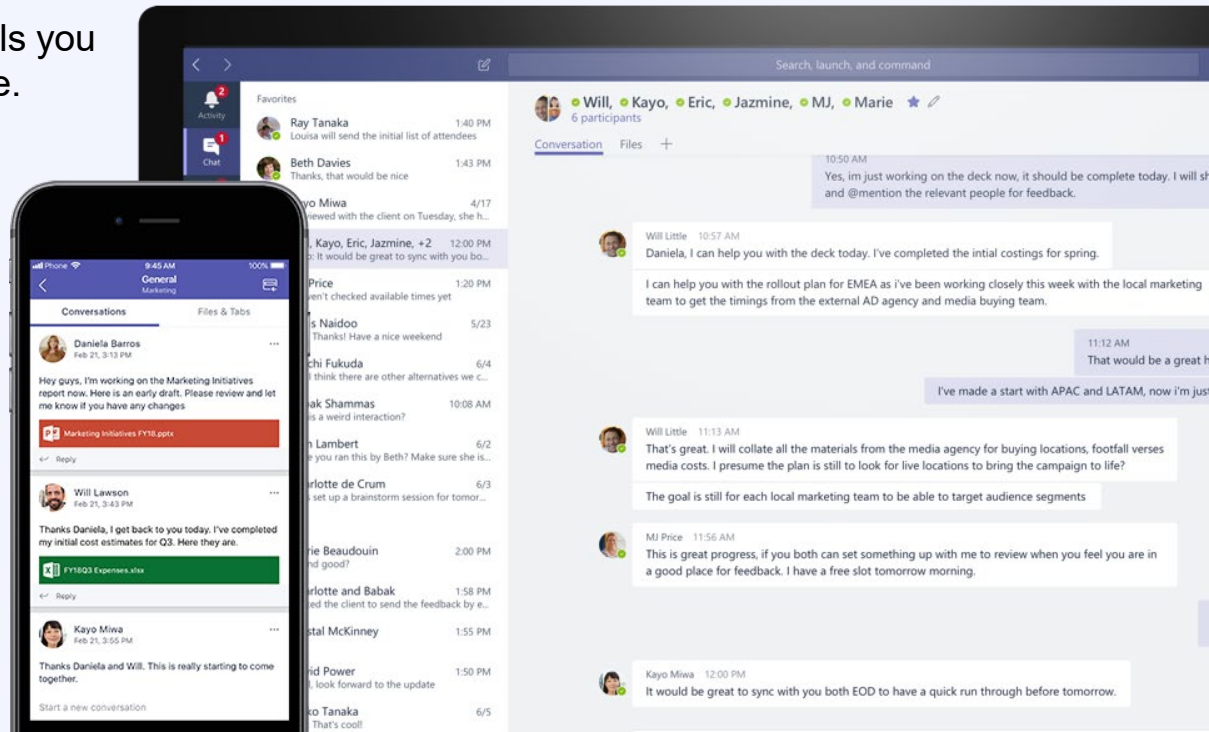
**Visit the Knowledge Base in the Service Portal
for more information on these platforms.**

Best Practices:

- For companywide Zoom webinars, disconnect from VPN (Just use Wi-Fi)
- Use a headset
- Check audio and video settings before each meeting

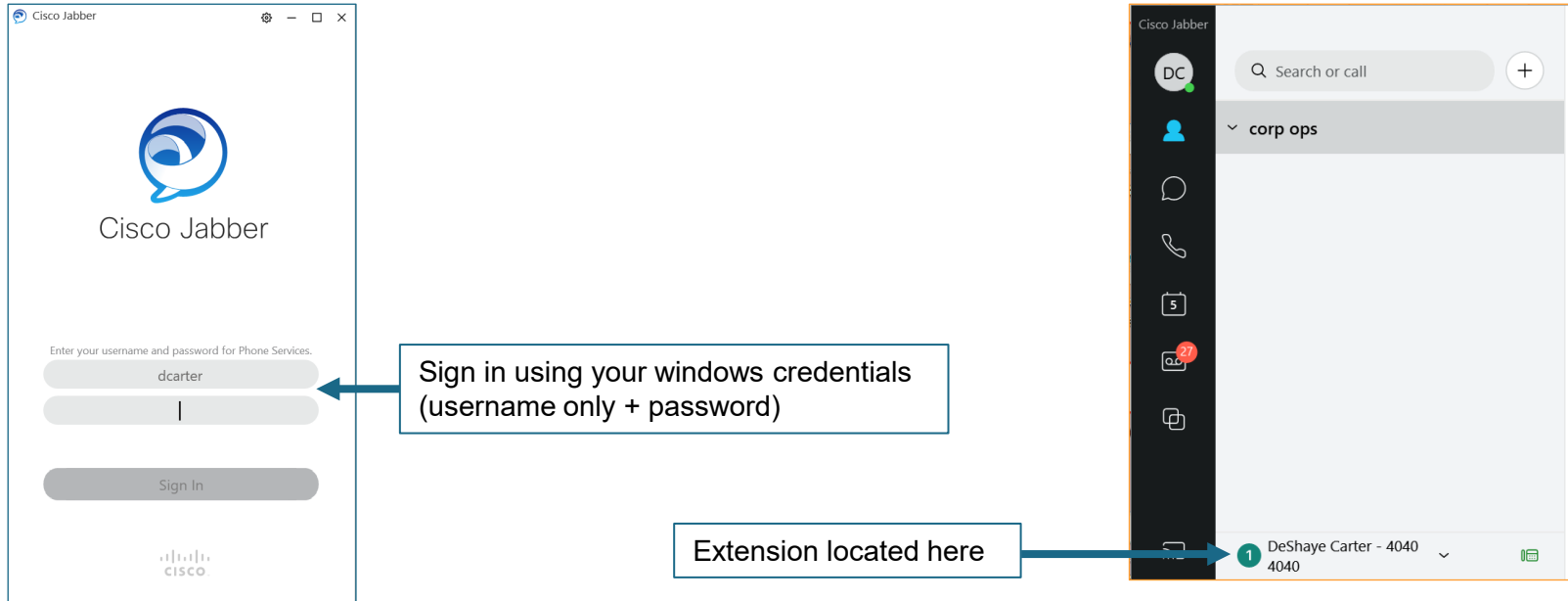
Internal Communications Platform: Microsoft Teams

Microsoft Teams is our internal communications platform and the hub for team collaboration in Office 365 that integrates the people, content, and tools you need to be more engaged and effective.



Cisco Jabber

Cisco Jabber is a communications application used to make and receive calls from your laptop.



For Jabber troubleshooting tips please visit the Files tab in the IT Operations – Public, Phone Support channel in Teams.

| Contacting CorpOps

Contacting CorpOps

- **Service Portal:** Submit a Ticket (Preferred Method)
- **Email:** CorpOps@emoneyadvisor.com
- **Microsoft Teams:** IT Operations – Public > CorpOps
- **Phone (leave a voicemail):**
 - x4004 (Internal)
 - 610-684-4680 (External)
- **Online Support:**
 - Monday through Friday from 7:30 AM – 8PM EST



Questions?

