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1. **Things to Know Before You Begin**

There are three (3) authentication factors available for access to the Chronic Condition Warehouse (CCW) and Virtual Research Data Center (VRDC). It is recommended that you enroll two (2) factors in the event your mobile device is not available.

1. **Okta Verify Application** – This solution requires a mobile device e.g., a smart phone with the Okta Verify application and is available on iOS and Android. This application provides a passcode and the ability to use the Push feature, which sends an alert to your mobile device to accept the login request.

2. **SMS Text Messaging Authentication** – This solution requires a mobile device that is able to receive SMS text messages.

3. **Voice Call Authentication** – This solution requires a valid phone number that the Okta software can call for verification.
2. **Enrolling a Factor**

This section of the document will outline the process to enroll your CCW User ID to an Okta factor.

1. To complete the initial enrollment, navigate to [https://www.ccwdata.org](https://www.ccwdata.org) and select **My CCW Login (Authorized Users Only).**

2. Enter your ‘CCW User ID’ and ‘Password’ in the corresponding fields.
3. Select the Okta factor you prefer most for the initial setup. To setup additional factors please see Managing Credentials.

2.1 Enroll Okta Verify Factor

Follow the steps below to set up the Okta Verify application on your mobile device.

1. Select the Setup button under Okta Verify.

2. Select the type of device you wish to setup.
3. Detailed instructions will be displayed for the corresponding device selected.
   a. If Apple is selected, you will be instructed to download the Okta Verify application from the App Store on your mobile device.

![Okta Verify download from App Store](image)

b. If Android is selected, you will be instructed to download the Okta Verify application from the Google Play Store on your mobile device.

![Okta Verify download from Google Play](image)

4. Open the Okta application on your mobile device and select ‘Add Account’.
5. You will then be required to allow the Okta Verify Application to access your camera.
6. Using your mobile device, scan the barcode on the screen.

![Barcode Scan](image)

7. A successful barcode scan will present a 6-digit code and your CCW User ID on your mobile device.

8. From your computer, select the Finish button.

![Finish Button](image)

9. If you are an existing CCW user, please continue to Step #10. If you are a new user, you will be prompted to change your password. Enter the temporary password provided by CCW Help in the ‘Old Password’ field. Create a new password using the guidelines detailed on the screen. Select the Change Password button.

![Password Change](image)
2.2 Enroll SMS Authentication Factor

Follow the steps below to setup the Okta SMS service to send a code via text message to your mobile device.

1. Select the **Setup** button under SMS Authentication.

2. Enter the mobile number (including 3-digit area code) to receive the SMS text message with a verification code. Select the **Send Code** button.

3. Enter the code received and select the **Verify** button.
4. Once the verification is successful, select the **Finish** button.

5. If you are an existing CCW user, please continue to Step #6. If you are a new user, you will be prompted to change your password. Enter the temporary password provided by CCW Help in the ‘Old Password’ field. Create a new password using the guidelines detailed on the screen. Select the **Change Password** button.
2.3 Enroll Voice Call Authentication Factor

Follow the steps below to setup the Okta Voice Call service to call a mobile or landline to provide a verification code via an audible recording.

1. Select the **Setup** button under 'Voice Call Authentication'.

   ![Voice Call Authentication Setup](image)

2. Enter the phone number (including the 3-digit area code) to receive a phone call with the verification code. Select the **Call** button.

   ![Voice Call Authentication Call](image)

3. Enter the code received and select the **Verify** button.

   ![Voice Call Authentication Verify](image)
4. Once the verification is successful, select the **Finish** button.

![Sign In:]

5. If you are an existing CCW user, please continue to Step #6. If you are a new user, you will be prompted to change your password. Enter the temporary password provided by CCW Help in the ‘Old Password’ field. Create a new password using the guidelines detailed on the screen. Select the **Change Password** button.

![Sign In:]

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CCW Okta Factor Enrollment and Management Guide

October 2019
3. Login Procedures

This section of the document will outline the different options for how to log into the CCW environment with the new Okta software.

3.1 Login Using the Virtual Desktop Infrastructure (VDI)

If you are accessing a VDI desktop, you will begin using the Okta Factor(s) as described in the steps below. Once you are connected and logged into your virtual desktop session, the new single sign-on feature will not require you to enter any credentials to access the CCW web applications.

1. From the VMware Horizon client, enter your CCW User ID in the ‘User name’ field (tst001).

2. Enter your CCW password in the field that states ‘Passcode’.
3. Enter which Okta factor you would like to use in the ‘Next Code’ field. This example’s options are to enter an Okta Verify passcode, enter ‘1’ to receive a voice call, ‘2’ to receive a push notification from your mobile device or ‘0’ to abort. The option numbers will vary depending on the factors you have enrolled. Please be sure to read the screen prior to entering an option number.

![Okta Factor Enrollment](image)

3.2 Login Using the CCW VPN

To connect to the CCW VPN, you will begin using the Okta Factor(s) as described in the steps below.

1. Open Cisco AnyConnect and select the **Connect** button.
2. Enter your ‘CCW User ID’ and ‘Password’ in the corresponding Username and Password fields.

3. Enter which Okta factor you would like to use in the Answer field. This example’s options are to enter an Okta Verify passcode, enter ‘1’ to receive a voice call, ‘2’ to receive a push notification to your mobile device, ‘3’ to receive SMS text or ‘0’ to abort. The option numbers will vary depending on the factors you have enrolled. Please be sure to read the screen prior to entering an option number.

4. Once verification is complete, select the Accept button to complete the VPN login process.
3.3 Login Using the CCW Website

If you are accessing the CCW website or web-based applications, you will begin using the Okta Factor(s).

3.3.1 Login with Okta Verify Factor

1. Enter your ‘CCW User ID’ and ‘Password’ in the corresponding fields.

2. You can either use the Push to mobile device functionality or enter the passcode from the Okta Verify application by selecting the **Or enter code**. This example uses the Push feature by selecting the **Send Push** button.
3. An alert is sent to your mobile device to accept the login. Accept the login.

3.3.2 Login with SMS Text Factor

1. Enter your ‘CCW User ID’ and ‘Password’ in the corresponding fields.
2. The last four digits of the phone number enrolled with your CCW User ID will be displayed. Select the **Send Code** button.

3. Enter the code received and select the **Verify** button.
3.3.3 Login with Voice Call Factor

1. Enter your ‘CCW User ID’ and ‘Password’ in the corresponding fields.

2. The last four digits of the phone number enrolled with your CCW User ID will be displayed. Select the **Call** button.
3. Enter the code provided and select the **Verify** button.
4. Managing Credentials

This section of the document will outline how to set up additional Okta Factor(s), how to modify the existing factors and reset a factor. Two Okta Factors are recommended in the event your mobile device is not available. To access the steps below, you must be logged into the CCW website with Okta MFA from the internet or a CMSNet connection.

1. Login to the CCW Website following the [Login Procedures](#) instructions.
2. Select the ‘Manage Multi-Factor Authentication’ link.
3. Scroll down to the ‘Extra Verification’ section.

4.1 Setup Additional Factors

The following sections and steps will provide how to setup additional Okta factors for authentication.

Within the ‘Extra Verification’ section, select the **Setup** button associated with the factor you wish to enroll. (Note: The factor initially enrolled in will say **Reset**. See [Reset a Factor](#) about functionality associated with the **Reset** button).
4.1.1 Enroll in Okta Verify

1. Select the Setup button to the right of ‘Okta Verify Mobile App’.
2. Choose the type of device you will be using to install the ‘Okta Verify Mobile App’.

3. Detailed instructions will be displayed for the corresponding device selected.
   c. If Apple is selected, you will be instructed to download the Okta Verify application from the App Store on your mobile device.
d. If Android is selected, you will be instructed to download the Okta Verify application from the Google Play Store on your mobile device.

4. Open the downloaded application on your mobile device and select ‘Add Account’.
5. You will then be required to allow the Okta Verify Application to access your camera.
6. Using your mobile device, scan the barcode on the screen.

7. A successful barcode scan will present a 6-digit code and your CCW User ID on your mobile device.
8. From your computer, select the Finish button.

9. Follow the instructions presented to download the Okta Verify application to your mobile device and complete the setup.
10. Once the verification is successful, select the Done button.

4.1.2 Enroll in Text Message

1. Select the Setup button to the right of ‘Text Message Code’.
2. Enter the mobile number to receive the SMS text message with a verification code. Select the Send Code button.
3. Enter the code received and select the Verify button.

4. A notification will display, confirming the setup was successful.

4.1.3 Enroll in Voice Call Verification

1. Select the Setup button to the right of ‘Voice Call’.
2. Enter the phone number (including 3-digit area code) to receive a phone call with the verification code. Select the Call button.
3. Enter the code received and select the Verify button.

4. A notification will display, confirming the setup was successful.
4.2 Reset a Factor

If changes are needed to the enrolled factor, use the ‘Reset’ function outlined below.

**Update**: This is where you can update the phone number associated with a factor.

**Disable**: This is where you are able to disable the chosen Okta Factor. This would be used to stop authentication in situations when a mobile phone is lost or stolen.

4.2.1 Reset Okta Verify Factor

1. Select the **Reset** button to the right of ‘Okta Verify Mobile App’.
2. Select the **Yes** button if you would like to revoke the Okta Verify token assigned to your account. This is a suggested practice if your mobile phone is lost or stolen.

![Set Up Okta Verify](image)

**Cases when you may want to revoke your Okta Verify token:**
- Your phone was lost and you want to make sure unauthorized users can’t access your account.
- You want to install Okta Verify on a different phone.

3. Follow the instructions presented to complete the setup.

4.2.2 Reset Text Message Code Factor

1. Select the **Reset** button to the right of ‘Text Message Code’.
2. Select one of the buttons below to perform the functions described.

![Set Up Text Message Verification](image)

3. Follow the instructions presented to complete the setup.
4.2.3 **Reset Voice Call Factor**

1. Select the **Reset** button to the right of ‘Voice Call’.
2. Select one of the buttons below to perform the functions described.

![Set Up Voice Call Verification](image)

3. Follow the instructions presented to complete the setup.
5. Troubleshooting

This section of the document provides instructions for common issues that may arise when setting up Okta factors.

5.1 QR Code Scanning Issues

If you run into issues scanning the QR code with your mobile device, use the following troubleshooting steps.

1. Select the ‘Problems scanning barcode?’ link.

2. Choose one of the options presented and select the Next button.

3. Once the verification is successful, select the Done button.
## Appendix A: Record of Changes

The following table records all changes made to this document.

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<thead>
<tr>
<th>Version</th>
<th>Date</th>
<th>Changed By</th>
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<tr>
<td>.01</td>
<td>3/11/2019</td>
<td>K.Pandullo</td>
<td>Created initial document</td>
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<td>3/20/2019</td>
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<td>Changes made after initial review</td>
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<td>3/26/2019</td>
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<td>4/2/2019</td>
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<td>Added Change Password screens</td>
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<td>Removed personal information from screen shots</td>
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<td>6/19/2019</td>
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<td>Updated screen shots for VDI upgrade.</td>
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<td>Updated screen shots for to include updated User Agreement</td>
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