



EVERISE

**Work From Home
Computer Self Set Up**

EVERISE

Welcome to Your System Setup!

We know you are excited to get started setting up your equipment! **Please follow the steps in this set up presentation carefully to complete the process.**

Please note:

- This process should take no longer than 1.5 hours to complete. Many of you familiar with setting up computers will complete in far less time.
- If at any point, you are stuck in this set up process, stop as we will help you on OBE day. We don't want you to stress or spend hours trying to figure it out on your own.
- A pre-setup room may be available at designated dates and times – which will be sent in the Everise Onboarding – Shipping and FAQ email sent to your personal email address. If you are setting up outside any designated time that is fine – just stop if you get stuck.
- On OBE day you will be split into groups based on how far you got in the set-up process.

Congratulations and Welcome to the Everise family!

Your Kit will contain:

- Please note, some items may look different based on your Line of Business.



1 Monitor



2 Tower or MiniPC



3 Keyboard and Mouse



4 Webcam



5 2 Power Cords

If you received the MiniPC, you should have two different Power Cords. For Tower users, you will have two of the same cords (on left)



6 Monitor Cable (VGA to DP)



7 Ethernet Cable

Packed Computer

- Here is an example of how your equipment may have been packaged.
- Please do not throw away any materials before your computer is fully set up.
- It is recommended to keep your box and packing materials in case of needing to return replacement equipment or at time of termination.

1. Monitor
2. PC (Tower or Mini) - Under the foam
3. Keyboard/Mouse
4. Webcam
5. Power Cords (2)
6. Display Cord
7. Ethernet Cord
8. Return Label



You will need to provide, prior to OBE:

1



Monitor

- Must be 21" (or larger)
- Must provide a display cable that will connect to this second monitor ports to a DisplayPort end (ex: HDMI to DisplayPort, DisplayPort to DisplayPort, etc)
- Laptops and tablets cannot be used as second monitors

2



- Must be Wired USB-A, no wireless
- Must be one of the following:
 - Plantronics 3320 Blackwire
 - Plantronics 5220 Blackwire
 - Plantronics Encore Pro 520 and a DA80 USB Plug Adapter

3



- Employees are required to have an Encrypted Broadband Wired Internet Connection
- No Mobile Hotspots, Satellite, or Wireless connection for Everise Equipment
- Speed Test met based on Company Specified Requirements

Pre-Set Up Checklists:

Set Up Location:

- ✓ Dedicated, Secure, Quiet Workspace. No one other than the employee should be allowed in the workspace during your shift
- ✓ Once set up is complete, will need to take 2 photos from different angles of workspace and send to Immediate Supervisor with first 15 days after setup.
- ✓ Workspace should be within 12 feet of modem/router. Everise will provide a 14ft cable, if you need longer, you will need to purchase yourself prior to OBE.
- ✓ Should be near enough outlets – You will need at minimum 4 outlets for your set up. *(We suggest you use a surge protector sufficient to support electronic equipment. This is an item you would have to purchase. Some agents choose to purchase a surge protector w/battery backup (about \$100). This avoids loss in pay as we don't pay you if you have home network issues.)*



Important

Computer must be placed within connecting distance of both your power source and router.

Pre-Set Up Checklists:



android



iOS


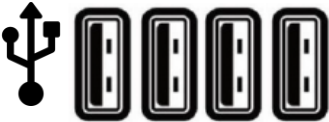

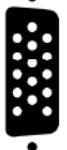

- Applications on your Personal Device:
1. Microsoft Authenticator – Used to login to Workday and Microsoft Applications



2. FortiToken Mobile – Used to access FortiClient VPN app on your work computer



Step One: Look on the back of your computer to identify these ports

-  **1** AC Power Port (Back of both the Tower PC & Monitors)
-  **2** USB Ports
-  **3** Ethernet Cable Port
-  **4** VGA Monitor Cord Port (We will use the VGA on the Monitor)
-  **5** DisplayPort (We will use this DP port on the Tower/MiniPC)



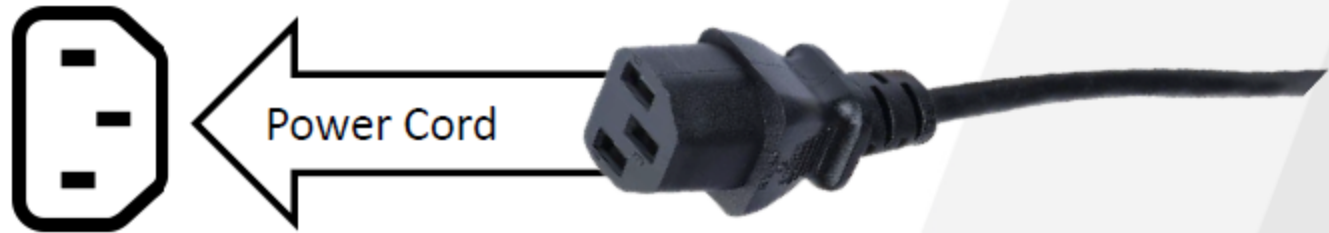
Mini PC – DC Power on the back

Equipment FAQ's

- 1** *I didn't receive a mouse.*
When you receive your keyboard and mouse in the dual box, the Mouse is located in a separate compartment from the keyboard, please open both sides of the box.
- 2** *My monitor was sent to me vertical, but it needs to be horizontal.*
Gently grip both sides of the monitor and then gently rotate the screen to horizontal position.
- 3** *I'm missing an item, I received the wrong item, or an item is damaged.*
Double check the Package photo slide earlier to ensure your item isn't still in the package. If still cannot find or your item is damaged, please wait until OBE Day for IT assistance.
- 4** When plugging in the equipment, be sure the cords are securely connected, but do not put too much pressure or wiggle the cords too much as this can damage the connection points.
- 5** A common troubleshoot for equipment set up is power not coming on, things to check:
Is it securely connected?
Does the outlet I'm plugging into work – try with another device, like a lamp.

Step Two: Connect Power to PC

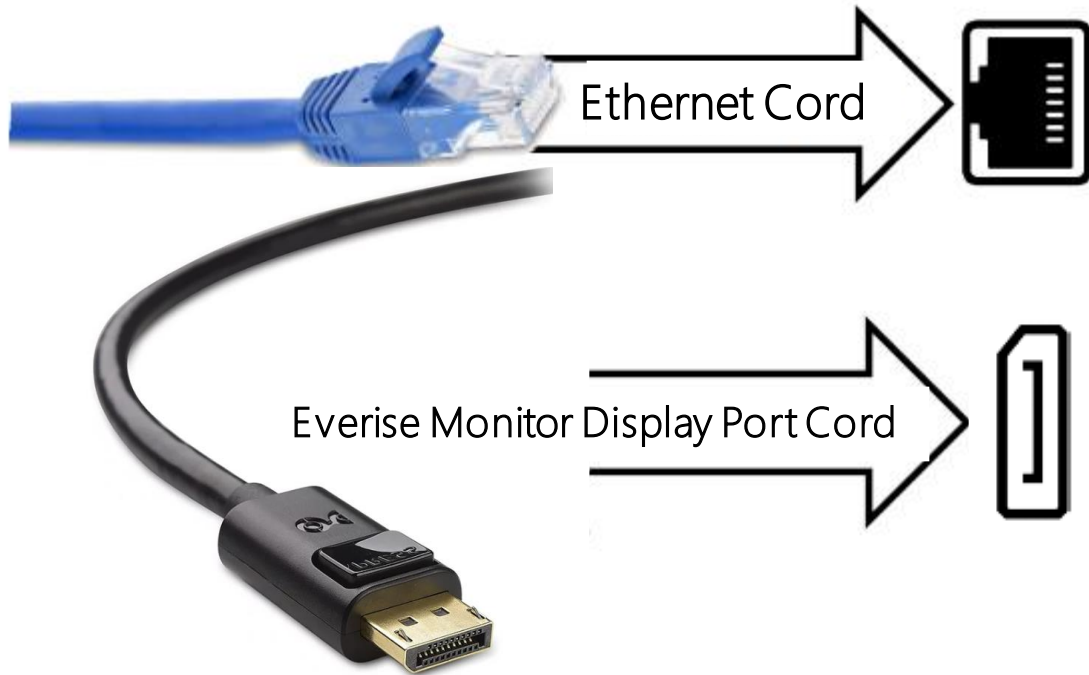
1. Connect power cable to computer power port.



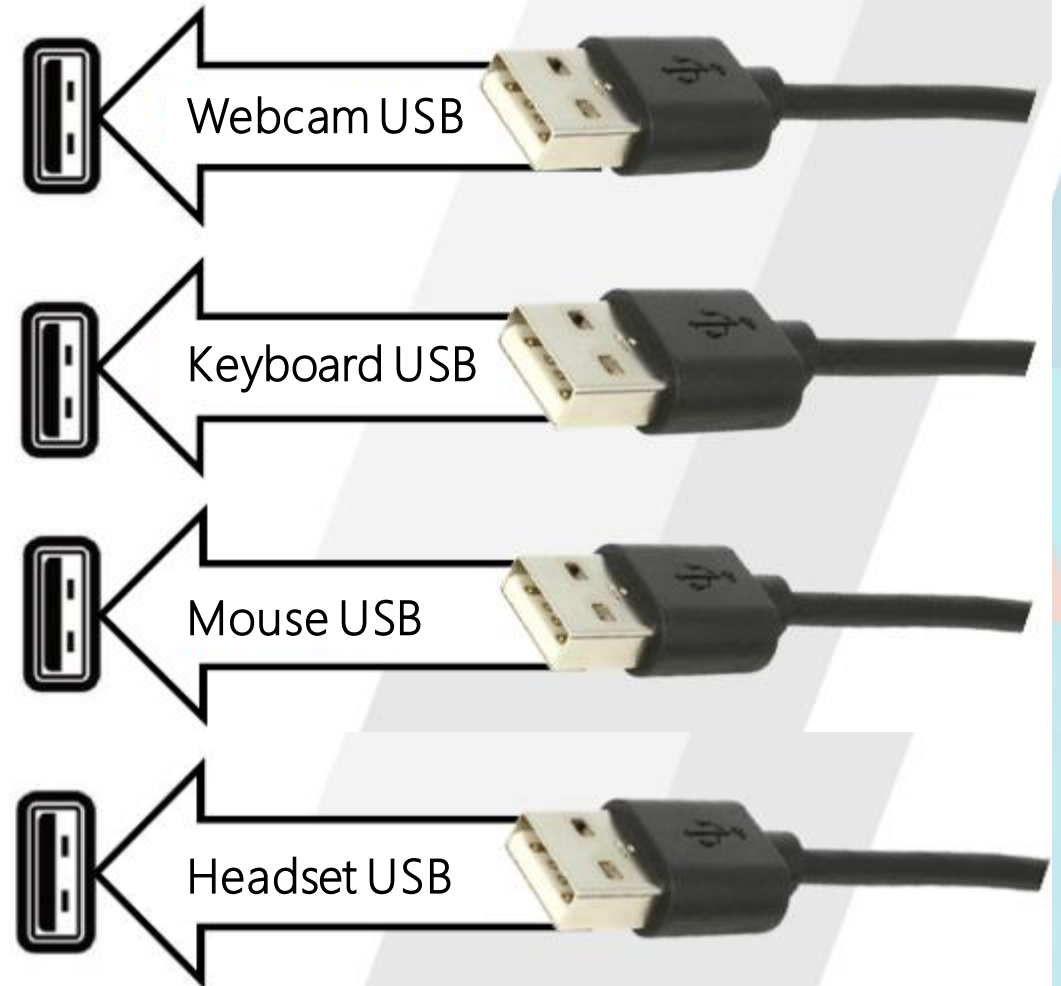
2. Connect power cable to power outlet.



Step Three: Connect remaining cables to computer



*Note for USB Ports – may be on the back or front of the computer.



HOW TO CONNECT?

PC TOWER + 1 MONITOR

USB Ports to connect Mouse and Keyboard

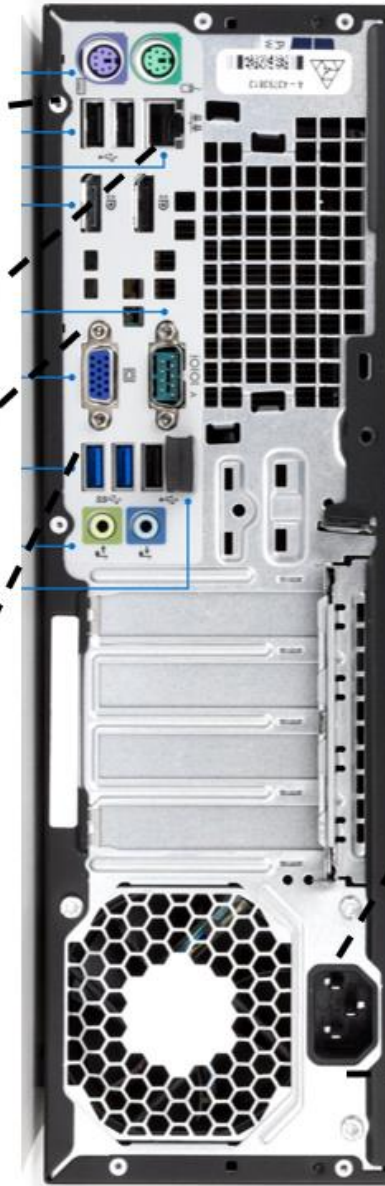
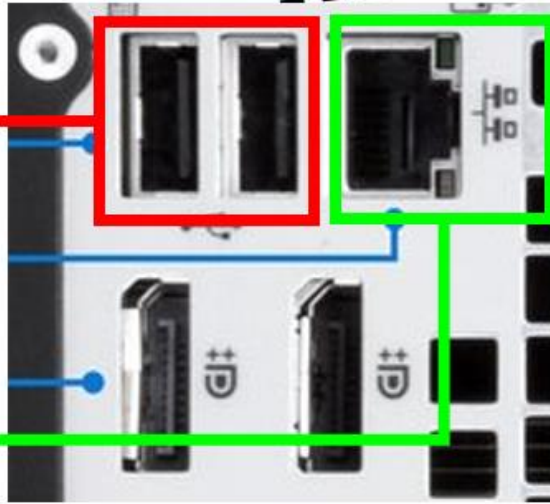
Ethernet port to connect CAT 5/6 Cable to router



To monitor

Monitor Cable (VGA to DP)

Display Port to connect to computer



To the strip

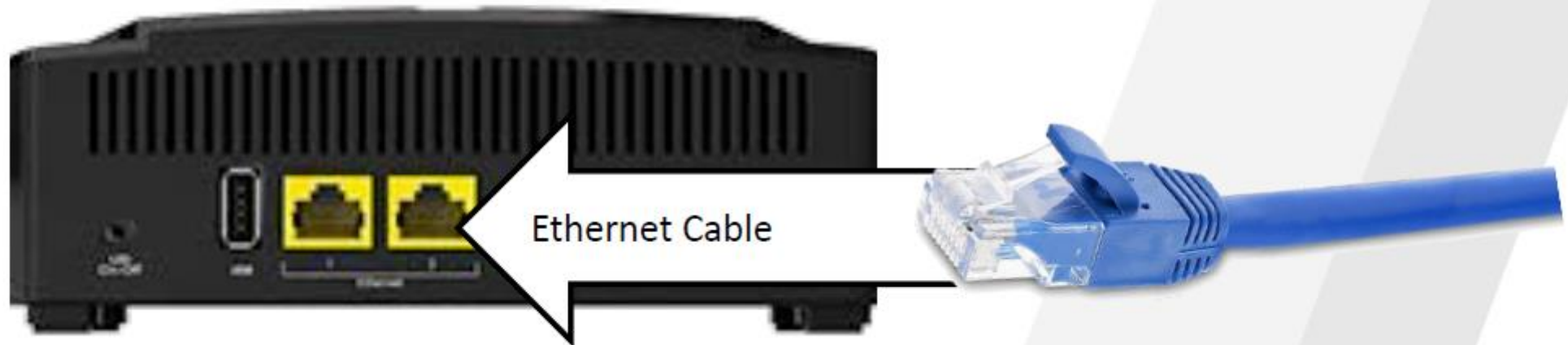


Power Cord



Power port

Step Three: Connect ethernet cable to router



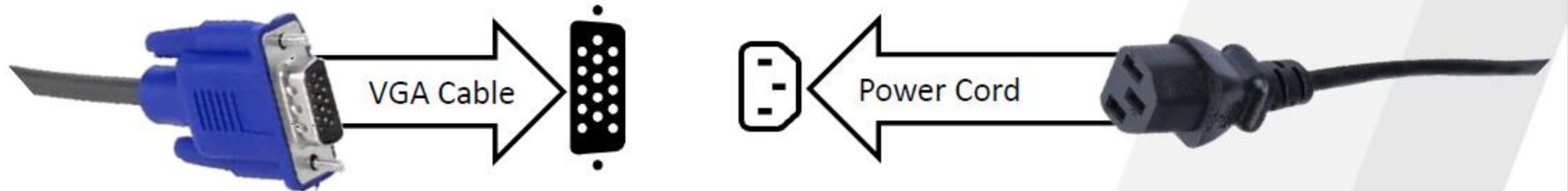
Step Five: Look under the monitor to identify these ports

VGA monitor cord port



AC power port

Step Six: Connect cables to monitor ports



Important

To add your own second monitor to your load-out, follow the manufacturer's connection instructions now.

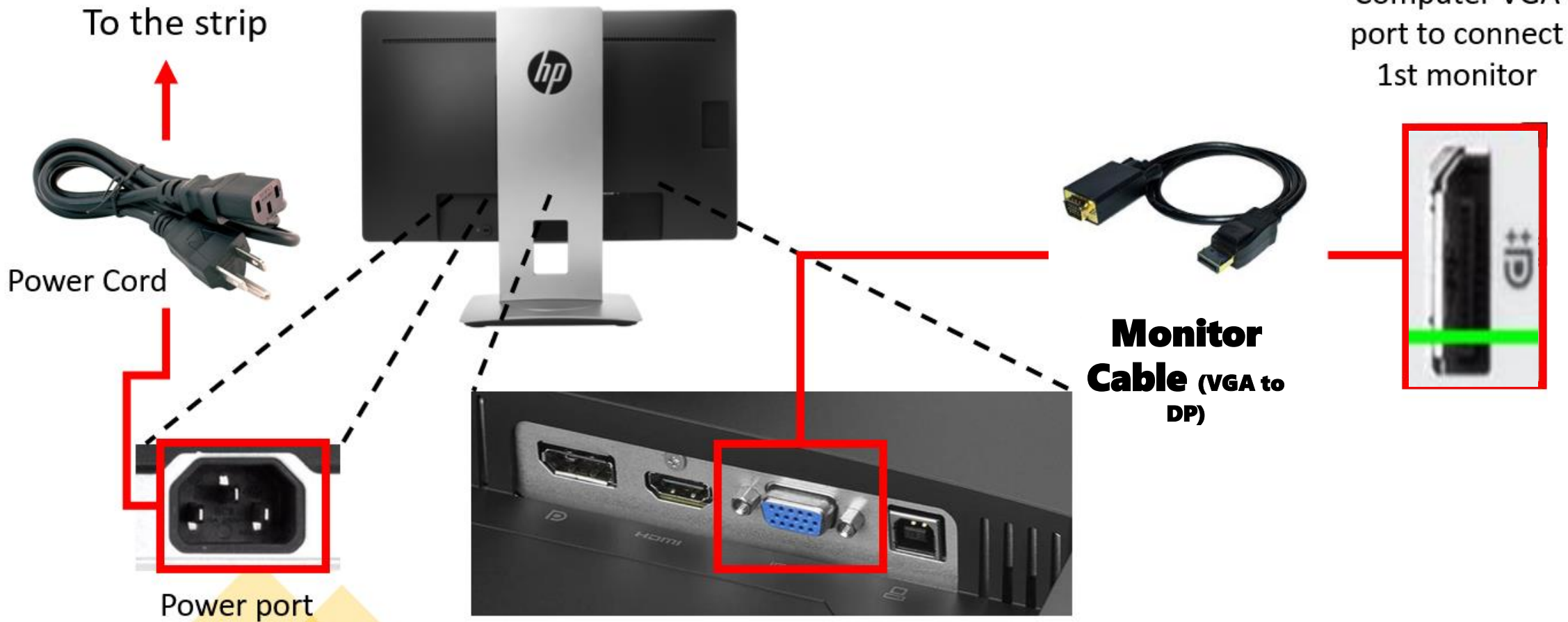
Note: Second monitor connections may be different from what is displayed above.

Otherwise, proceed to the next step.

HOW TO CONNECT?

PC TOWER + 1 MONITOR

Rear of Monitor



Power Cord

To the strip

Power port

Monitor Cable (VGA to DP)

Computer VGA port to connect 1st monitor



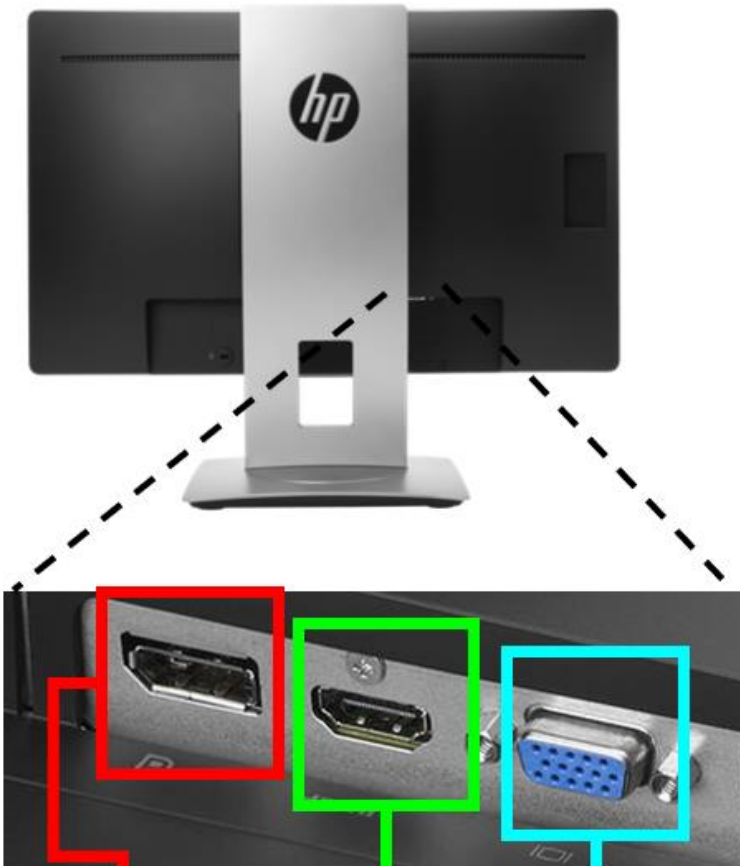
HOW SHOULD IT LOOK?

HOW TO CONNECT 2nd MONITOR?

Rear of 2nd Monitor

Rear of 1st Monitor

Rear Computer
VGA port to
connect 1st
monitor



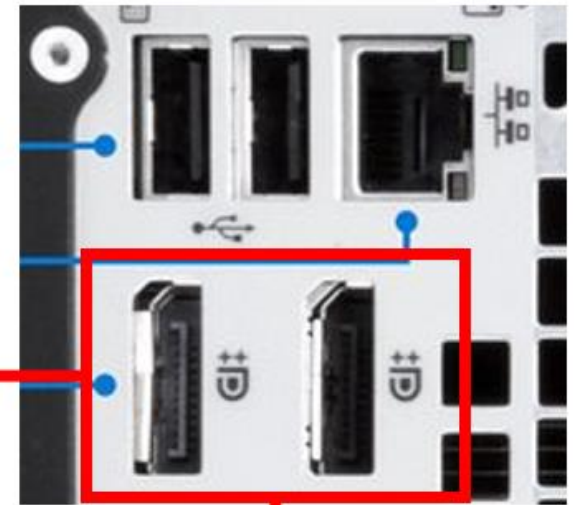
Display
port

HDMI

VGA



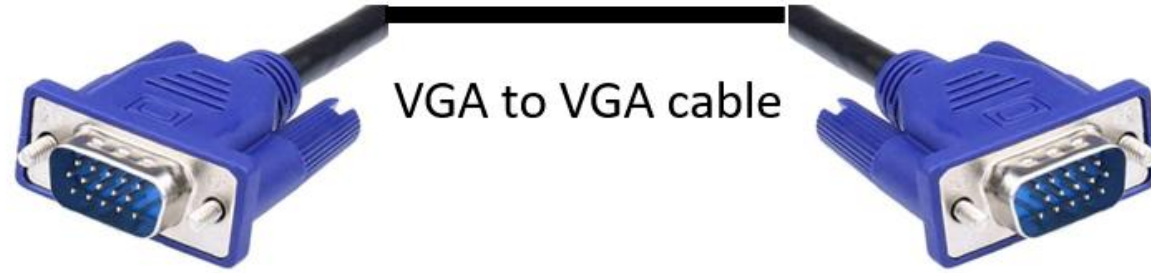
Display Port to: DP, HDMI,
VGA cable



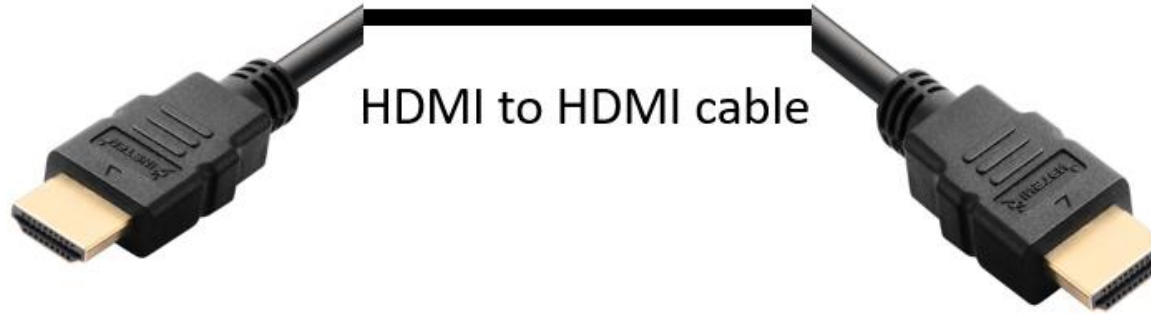
Rear Computer
Display Ports to
connect 2nd monitor

TYPES OF VIDEO CABLES

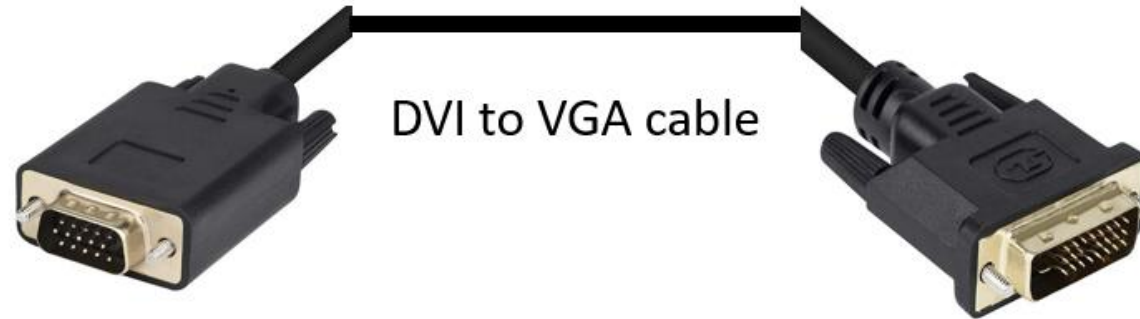
VIDEO PORTS
BACK MONITOR



VGA to VGA cable



HDMI to HDMI cable



DVI to VGA cable

VIDEO PORTS
BACK PC



TYPES OF DISPLAY PORT CABLES

VIDEO PORTS
BACK MONITOR

DISPLAY PORT
BACK PC



DP to VGA cable



DP to HDMI cable



DP to DVI cable

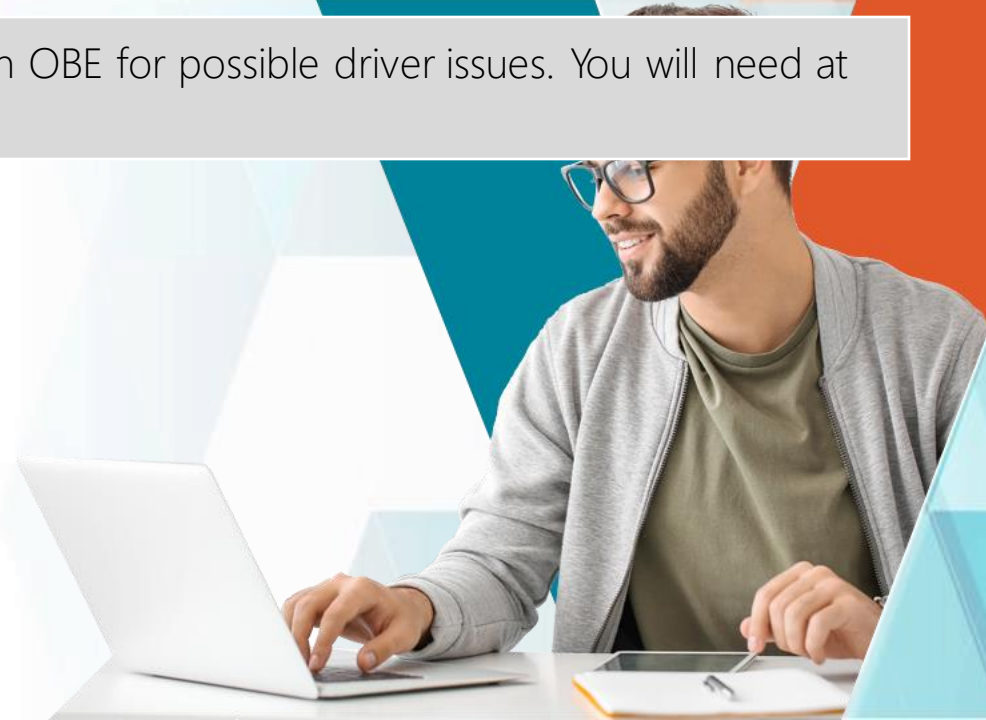


DP to DP cable



Monitor FAQ's

- 1** *I've plugged in my monitor to my computer, but the monitor says "No Display Detected"*
First make sure that you have securely plugged in the VGA port into the Monitor and the DisplayPort into the PC. If you have already done so, and still receive error, you can test with your personal monitor. If you still receive an error on both, you can stop the setup process and join your OBE for IT assistance.
- 2** Both monitors will plug into the PC, not to each other.
- 3** If second monitor saying not detected, it will be fixed on OBE for possible driver issues. You will need at least one working monitor to start training on OBE day.



Step Seven: Turn on monitor and computer



Step Eight: Login to Windows



Login using the username and password included in the email recently sent to you from EveriseOnboarding@c3connect.com.

LOGIN IN WINDOWS

First Step

This will kick off your InTunes setup for your account.

How would you like to set up?



Set up for personal use

We'll help you set it up with a personal Microsoft account. You'll have full control over this device.



Set up for an organization

You'll gain access to your organization's resources like email, network, apps, and services. Your organization will have full control over this device.

Next

Type your C3
email

 Sign in with Microsoft

Work or school account

jsomeone@example.com

Which account should I use?

Sign in with the username and password you use with Office 365 or other business services from Microsoft.

[Domain join instead](#)

[Privacy & cookies](#)

[Terms of use](#)

[Next](#)

Security confirmation

Use Windows Hello with your account

Your organization requires you to set up your work or school account with Windows Hello Face, Fingerprint, or PIN.

If you've already set up Windows Hello on this device, we'll automatically add it for this account. You may be asked to re-verify with Windows Hello.



If your organization requires a more complex PIN, Windows will prompt you to change it.



OK



Enter code

 We texted your phone +XXX XXXXXX  Please enter the code to sign in.

Code

Cancel


Verify

Type 6 digit
for your pin

Windows Security ✕

Set up a PIN

Create a PIN to use in place of passwords. Having a PIN makes it easier to sign in to your device, apps, and services.



Include letters and symbols

Now click in
"ok" to
completed
intune enroll

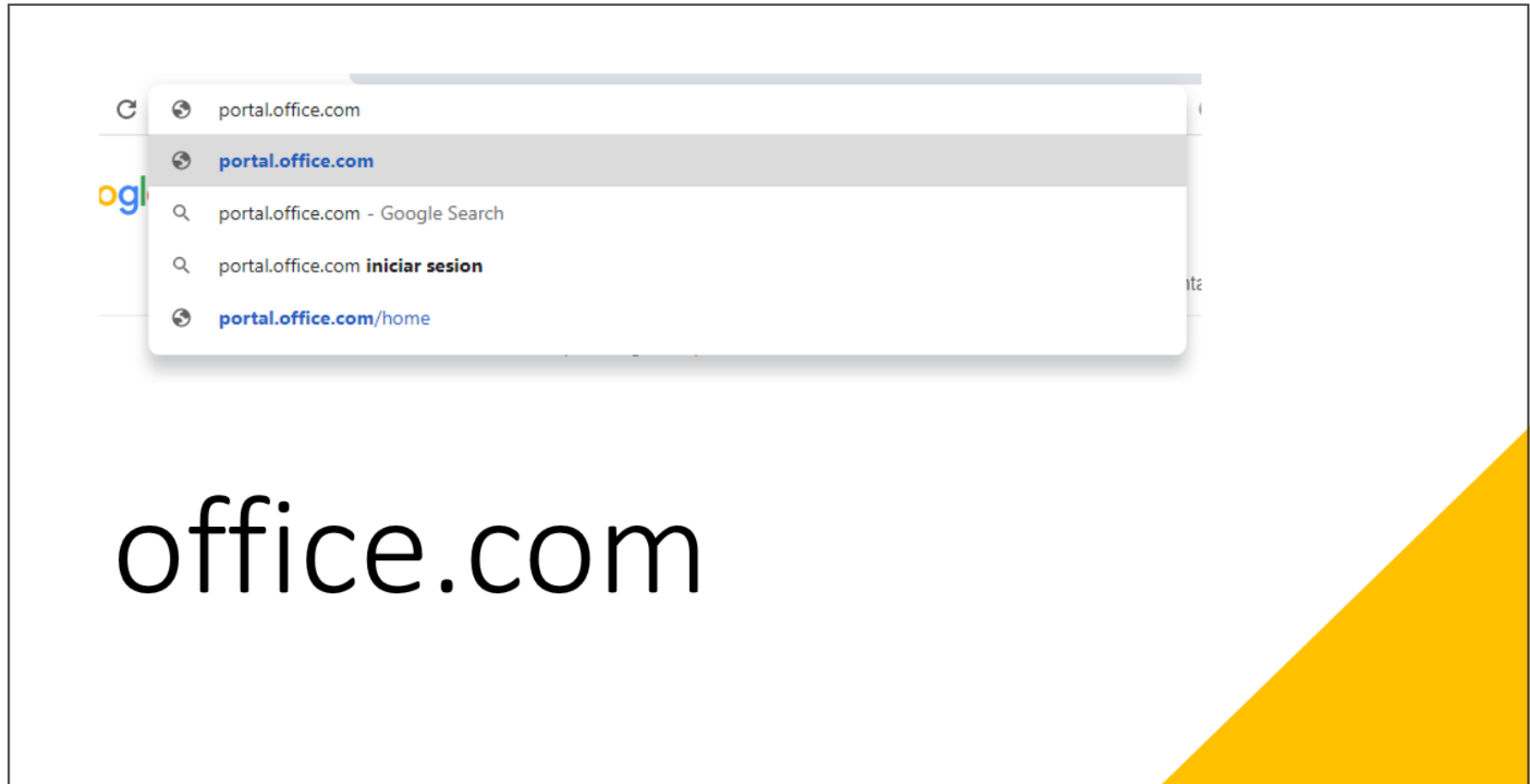
All set!

You can sign in with your PIN now.



OK

- Once logged into computer, locate the Google Chrome Application on the desktop and go to office.com or portal.office.com



office.com



Sign in to your account



login.microsoftonline.com/common/oauth2/authorize?client_id=00000006-0000-0ff1-ce00-000000000000...



Sign in

Email, phone, or Skype

No account? [Create one!](#)

[Can't access your account?](#)

[Sign-in options](#)

Next



Sign in

Email, phone, or Skype

No account? [Create one!](#)

[Can't access your account?](#)

[Sign-in options](#)

Next

Put in your C3 email

Example:

`jcatalan@c3connect.com`

Click on Next



← jcatalan@c3connect.com

Enter password

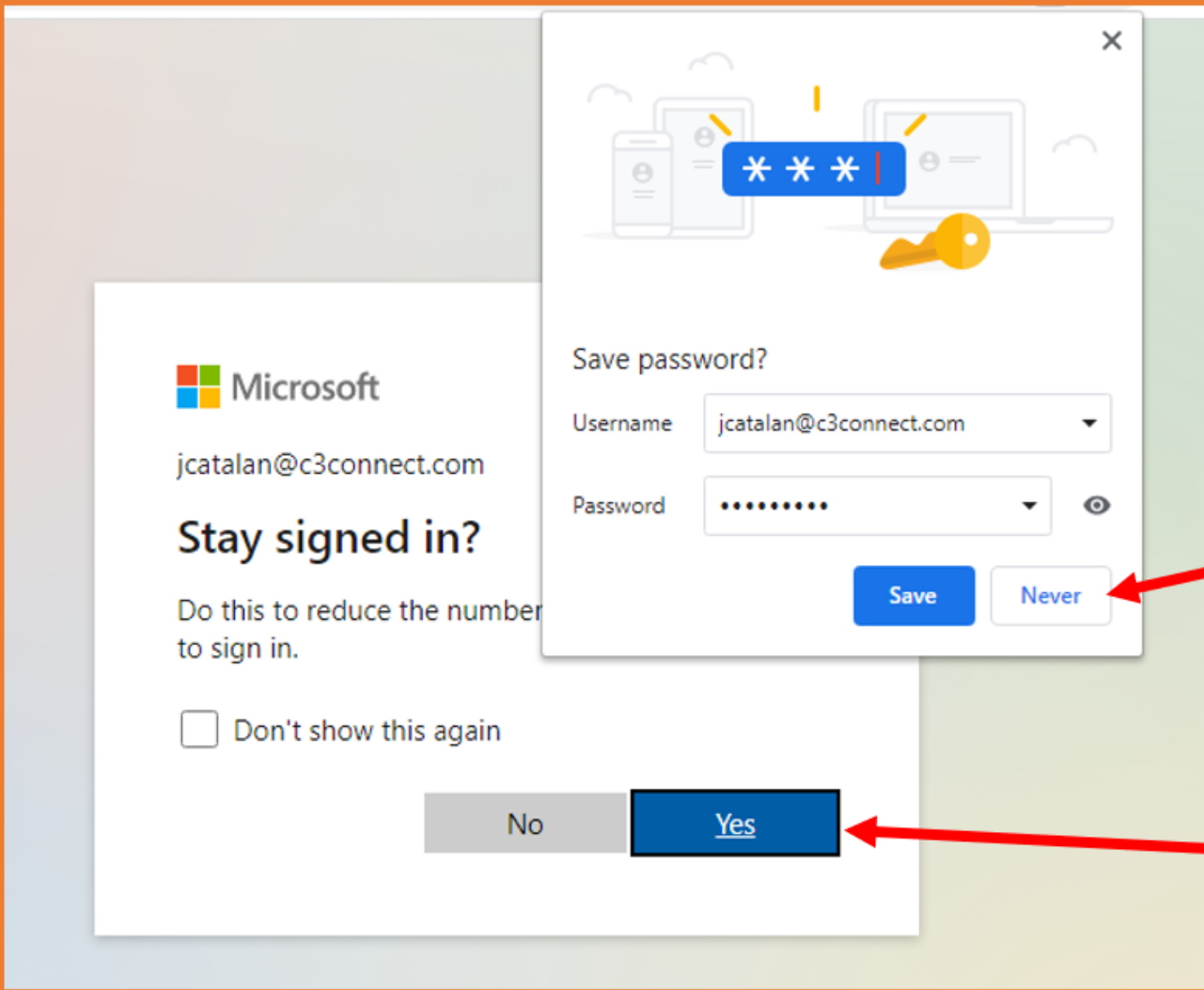
Password

[Forgot my password](#)

Sign in

Enter the password
shared with your C3
email

Click on Sign in



This pop ups will appear

Click on Never

Click on Yes

1. First select your country
2. Add your cellphone number
3. wait for your token

Microsoft

Additional security verification

Secure your account by adding phone verification to your password. [View video to know how to secure your account](#)

Step 1: How should we contact you?

Office phone

United States (+1) Extension

Contact your admin if you need to update your office number. Do not use a Lync phone.

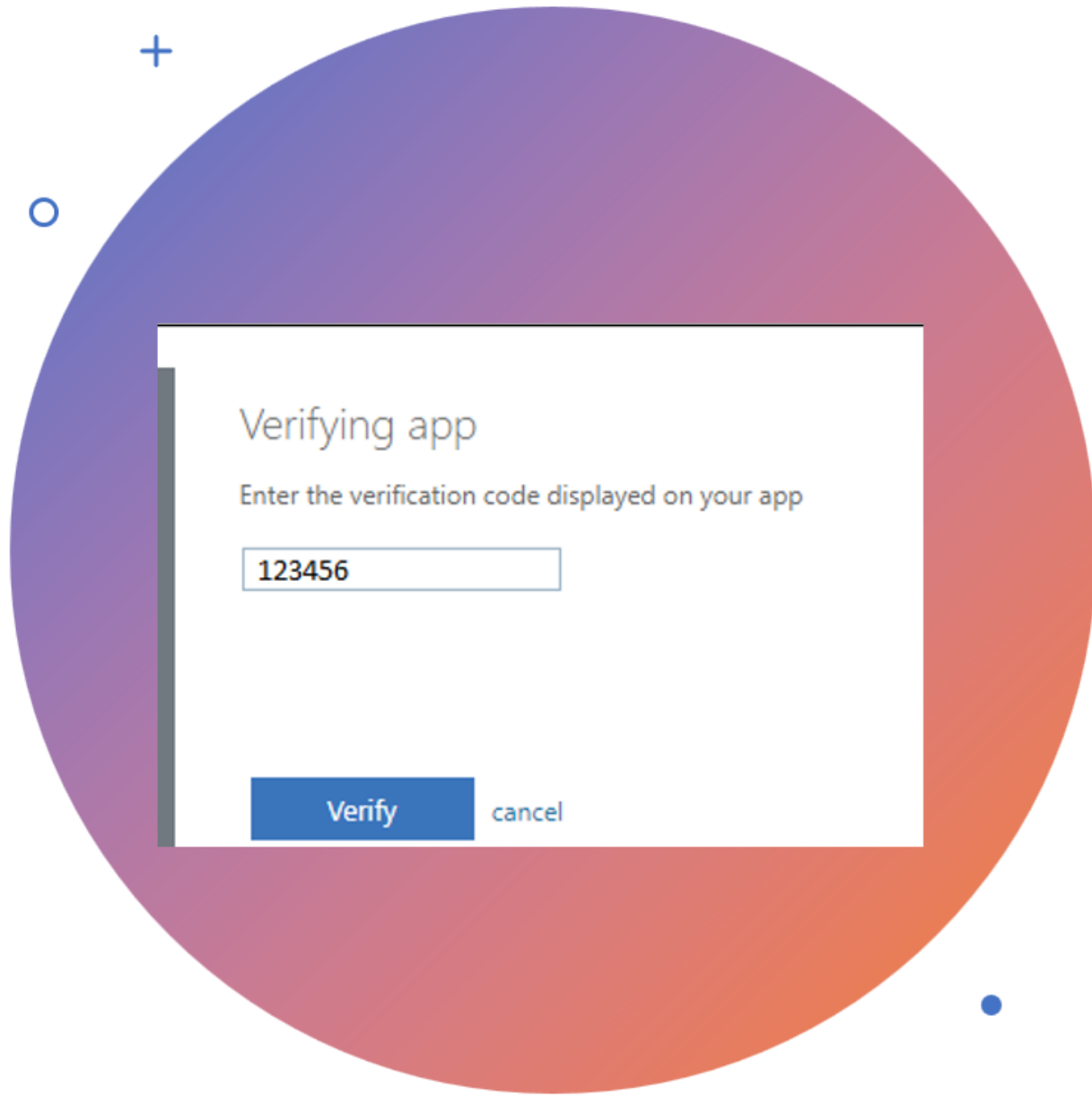
[Next](#)

Your phone numbers will only be used for account security. Standard telephone and SMS charges will apply.

Microsoft Authenticator



- Open the Microsoft Authenticator App on your personal device.
- Follow the on-screen instructions to Add Account.
- Add a Work/School Account.
- Click Sign in and use your C3Connect Email and Password that was emailed to your personal email.
- Once connected, you will begin to see 6 digit numbers circulate on the screen. You will use these as your MFA (multi-factor authentication)



Add your token

4. In your cellphone you received 6 number that is your token use those number to regist your cellphone in office

Office applications

The screenshot shows the Office 365 web interface. At the top, the browser address bar displays "office.com/?auth=2&home=1". The page header includes the "Office 365" logo and a user profile icon labeled "JC". A navigation bar on the left contains a home icon, a plus sign, and a vertical list of application icons: Word (W), Excel (X), PowerPoint (P), Outlook (O), OneDrive (cloud), and Teams (N). These icons are enclosed in a red rectangular box. A red arrow originates from the "Office applications" title and points to the PowerPoint icon. The main content area features a greeting "Good afternoon" and an "Install Office" button. Below this is a "Recommended" section with three cards: a document by Federico Antonio Gantioqui I... (yesterday at 3:24 PM), a shared document by Susely Escobar (Wed at 10:16 AM), and a video recording by Cristian Godinez (Wed at 11:48 AM). Each card includes a thumbnail image and a title. At the bottom, there are tabs for "Recent", "Pinned", "Shared with me", and "Discover".

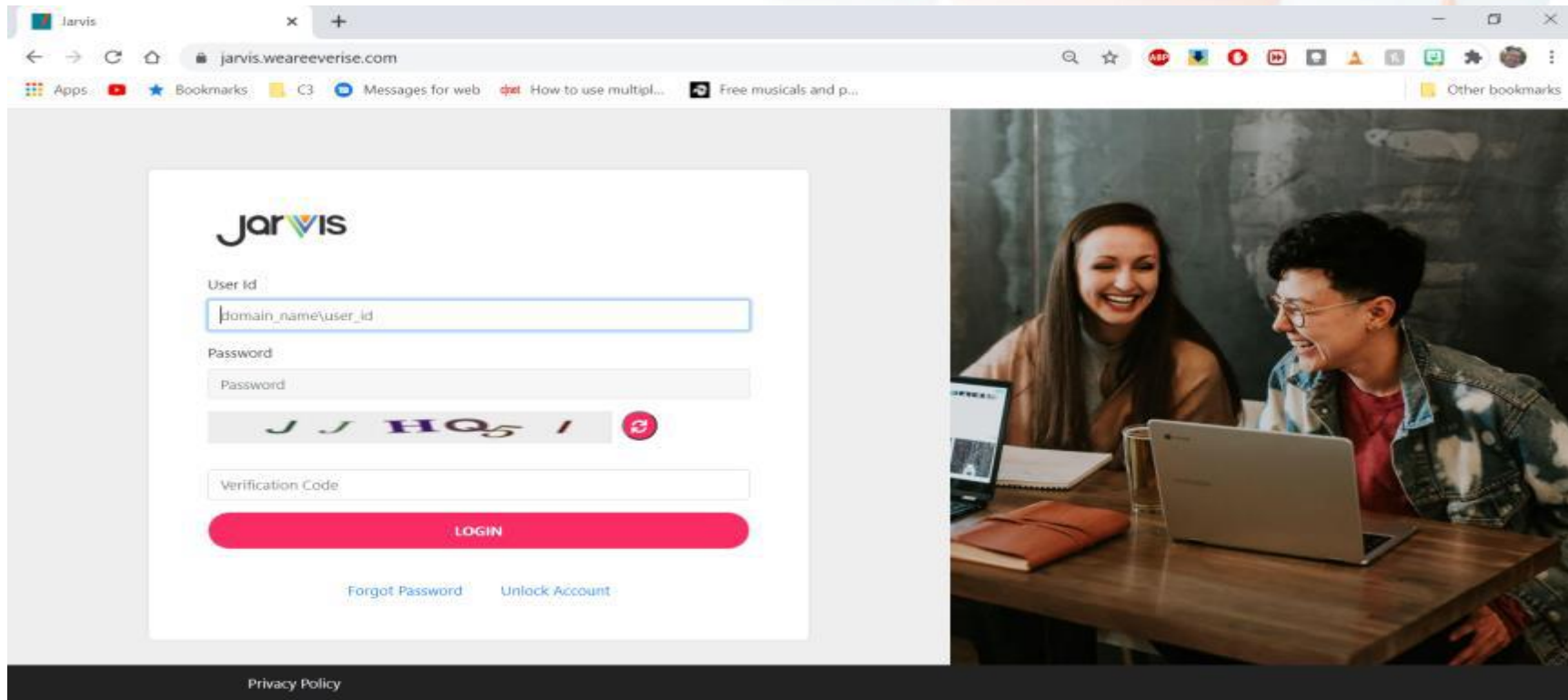
Update Jarvis Password

- Jarvis – Agent self-help password reset portal/tool
- • This portal/tool for use by AGENTS ONLY
- • Can only be used ONCE every 24 hrs
- • Access portal/tool via Google Chrome (not inside Everise Citrix VDI)
- • Initial setup must be done by agent with a valid/working password
- • After password reset or account unlock, allow 5-10 minutes for synchronization before attempting to use



INITIAL SETUP

- 1) Access Jarvis with this URL: <https://jarvis.weareeverise.com/>



Login to Jarvis

- Step 6: Agent will be prompted to select and store answers to 3 security questions and verify their Employee ID:
- Step 7: Answer questions and click SAVE

Set Security Questions

You've not completed your security questionnaire, please complete this section first before you proceed further. ✕

Select security question ✕

Answer

Select security question ✕

Answer

Select security question ✕

Answer

Employee Id

SAVE

Change Password

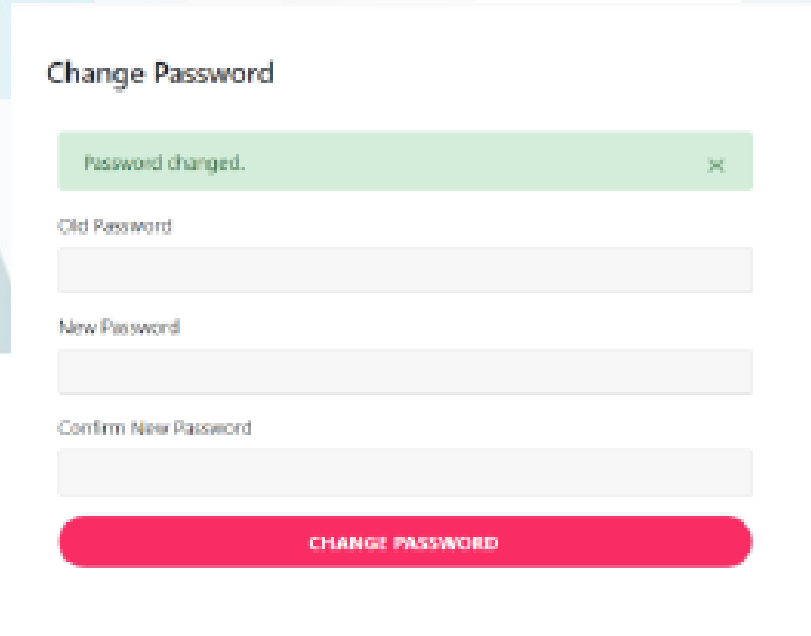
- Step 8 : To return to the change password screen, click on Control Panel and select Change Password
- Step 9: Fill in the fields for Old Password and New Password. And Select Change Password.

The screenshot shows a web form titled "Change Password". It contains three input fields: "Old Password", "New Password", and "Confirm New Password". Each field is currently filled with a series of dots representing masked text. Below the input fields is a prominent red button labeled "CHANGE PASSWORD".

This screenshot shows the Jarvis system interface. On the left is a vertical navigation menu with the Jarvis logo at the top. The menu items include "Control Panel" and "Change Password". The "Change Password" option is highlighted. To the right of the menu is the "Set Security Questions" form. At the top of this form is a green notification bar that says "Security questions updated." Below this are three rows of "Select security question" dropdown menus, each followed by an "Answer" text input field. At the bottom of the form is an "Employee Id" input field and a red "SAVE" button.

Change Password

- IF Successful, you'll see a green banner appear saying "Password Changed"
- *** ALLOW 5-10 MINUTES FOR NEW PASSWORD TO SYNCHRONIZE BEFORE ATTEMPTING TO USE**



The screenshot shows a 'Change Password' form with a white background and a light blue border. At the top, the title 'Change Password' is displayed. Below the title is a green success banner with the text 'Password changed.' and a close icon. Underneath are three input fields: 'Old Password', 'New Password', and 'Confirm New Password'. At the bottom of the form is a red button with the text 'CHANGE PASSWORD' in white capital letters.

Reset Password AFTER Initial Set up

- 1. Click on Forgot Password
- 2. Type in user_id in this format: **c3connect\user_id**
- 3. Click Next button
- 4. Answer security questions, verify Employee ID, type and verify a new password
- 5. Click RESET PASSWORD button

Reset Password

What is your favorite color?

What was the first company that you worked for?

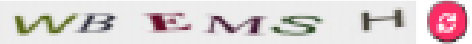
What is the name of your first pet?

[Back to Login](#)

Jarvis

User Id

Password

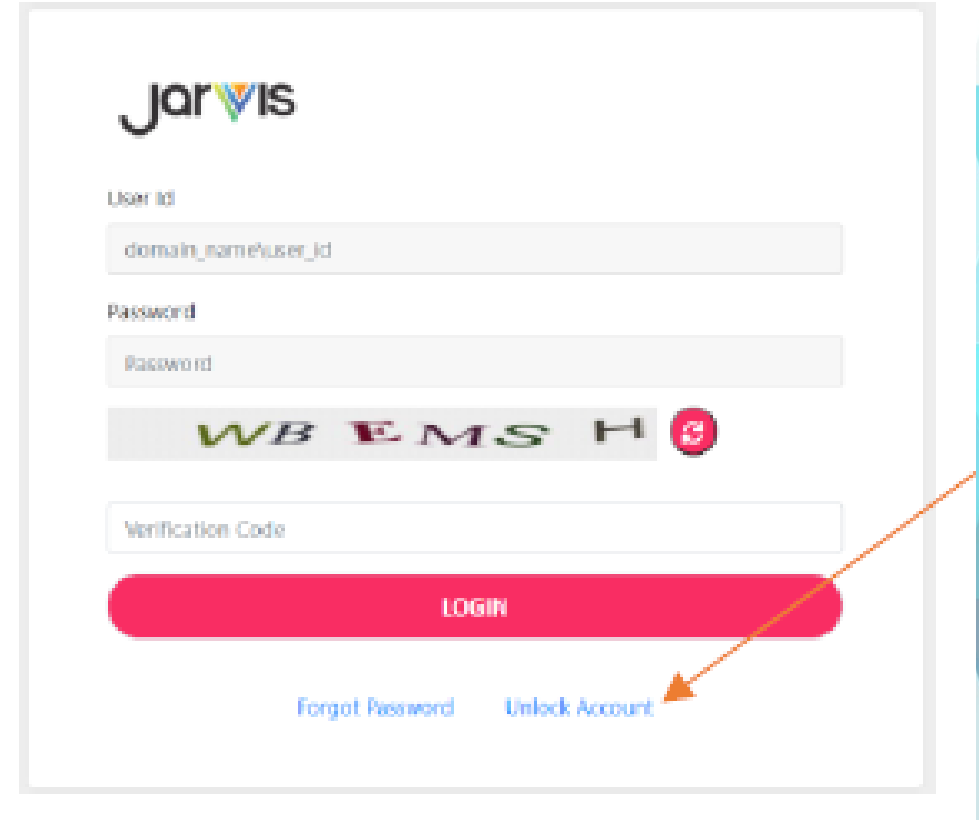


Verification Code

[Forgot Password](#) [Unlock Account](#)


Account Unlock After Initial Set Up

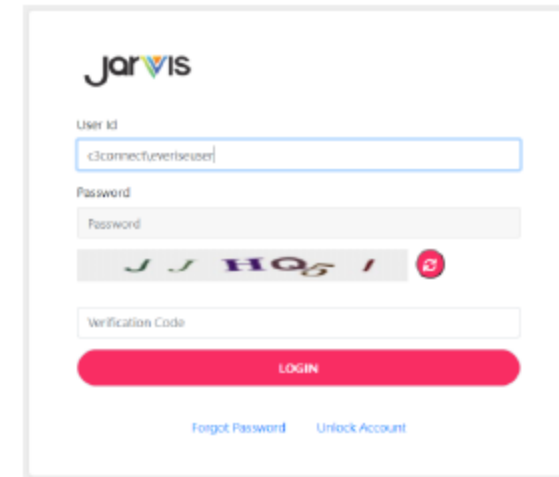
- Repeat the same steps as the Reset Password listed above, expect for Step 1.
- 1. Click on ‘Unlock Account’



The screenshot displays the Jarvis login interface. At the top left is the 'Jarvis' logo. Below it are three input fields: 'User Id' with the placeholder 'domain_name@user_id', 'Password' with the placeholder 'Password', and a verification code field containing 'WB EMS H' and a red circular icon with the number '3'. A prominent red 'LOGIN' button is centered below the fields. At the bottom, there are two links: 'Forgot Password' and 'Unlock Account'. An orange arrow points from the right side of the slide to the 'Unlock Account' link.

Login to Jarvis

- Step 2: Type in user_id in this format: **c3connect\user_id**
- Step 3: Type password
 - * agent must have a valid/working password for initial setup (this is the same password you use for O365/Team, VPN & Everise Citrix)
- Step 4: Type verification code displayed in the grey box *if you're having difficulty reading the code, click on  to get a new/different code
- Step 5: Click the LOGIN button



The screenshot shows the Jarvis login interface. At the top left is the Jarvis logo. Below it are four input fields: 'User Id' containing 'c3connect\user_id', 'Password' (masked with dots), a grey box containing a verification code 'JJHQ51' with a refresh icon to its right, and 'Verification Code'. Below these fields is a prominent red 'LOGIN' button. At the bottom of the form are two links: 'Forgot Password' and 'Unlock Account'.



Word



Excel



Power Point



Outlook



One Drive



One Note






Teams

New message

Mark all as read Undo

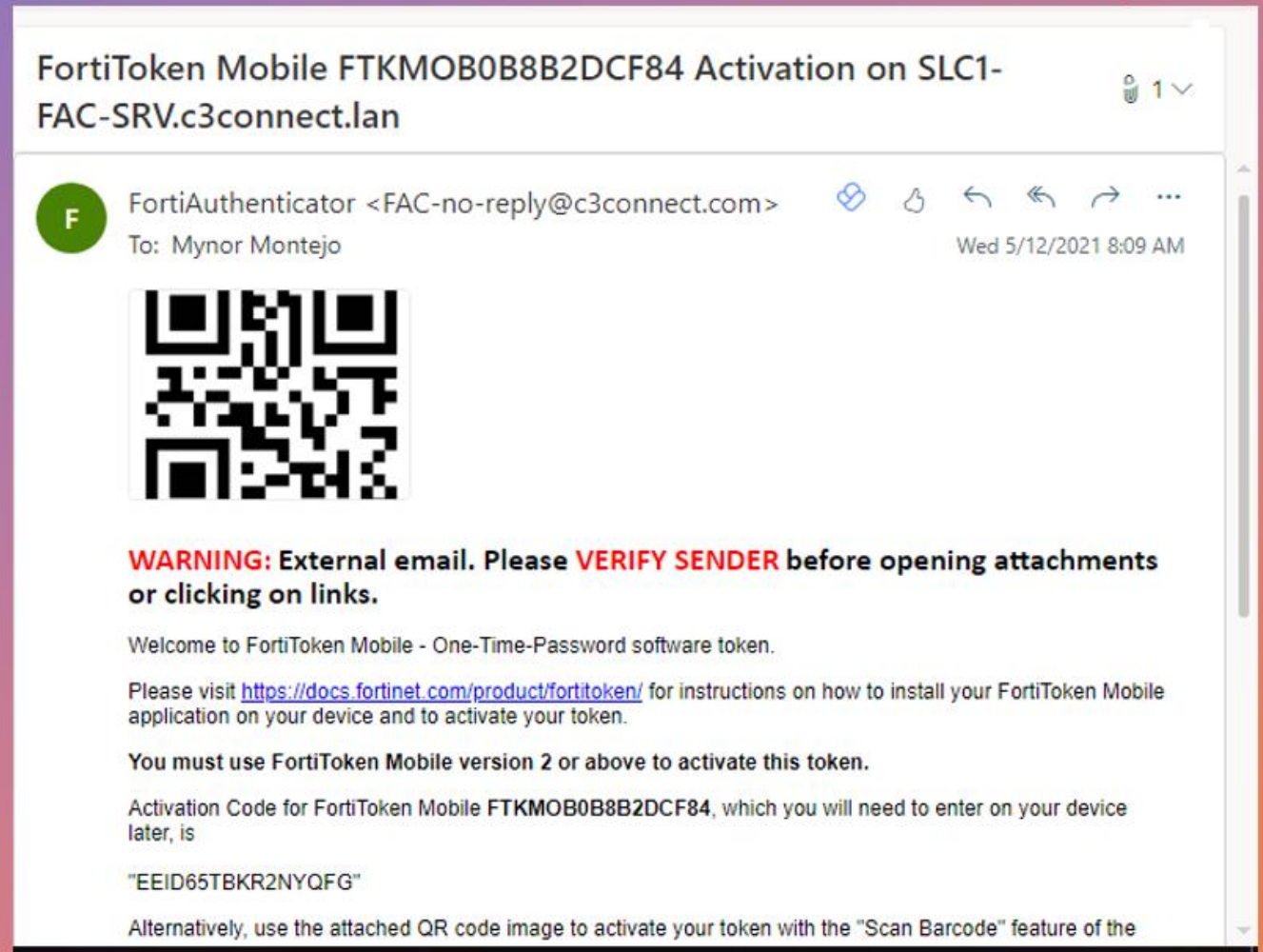
OBE: HRB 9A
Now

- Favorites
- Inbox 30
- Sent Items
- Deleted Items
- Add favorite
- Folders

<input checked="" type="checkbox"/>	Focused	Other	Filter
	Viviana Garsia > Forticlient-AnyDesk Do I click on get started?		↩ 12:25 PM
	Lonnie Yates; Whitney Akpobo > EXTERNAL: Error on lo... They need to change the login account t...		→ 11:01 AM
	Shondranique Small > EXTERNAL:		↩ 📎 11:00 AM



Look for Fortitoken email

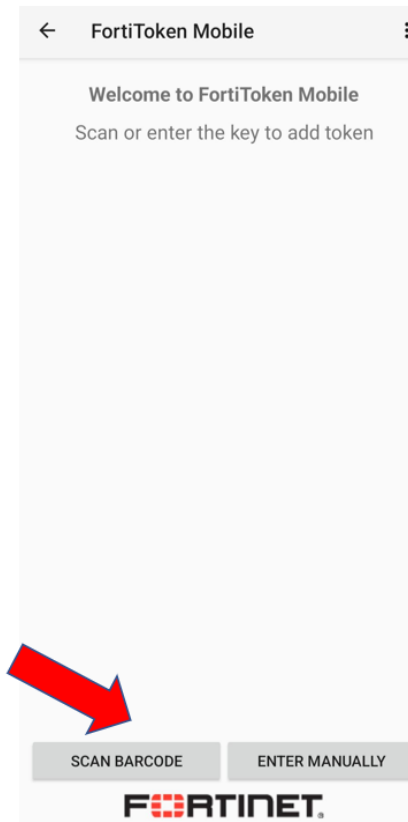


FortiToken Application



- Open the FortiToken App on your personal device

*Do not scan the QR code on this screen, this is an example. Scan the code from your Fortitoken email in your work inbox.



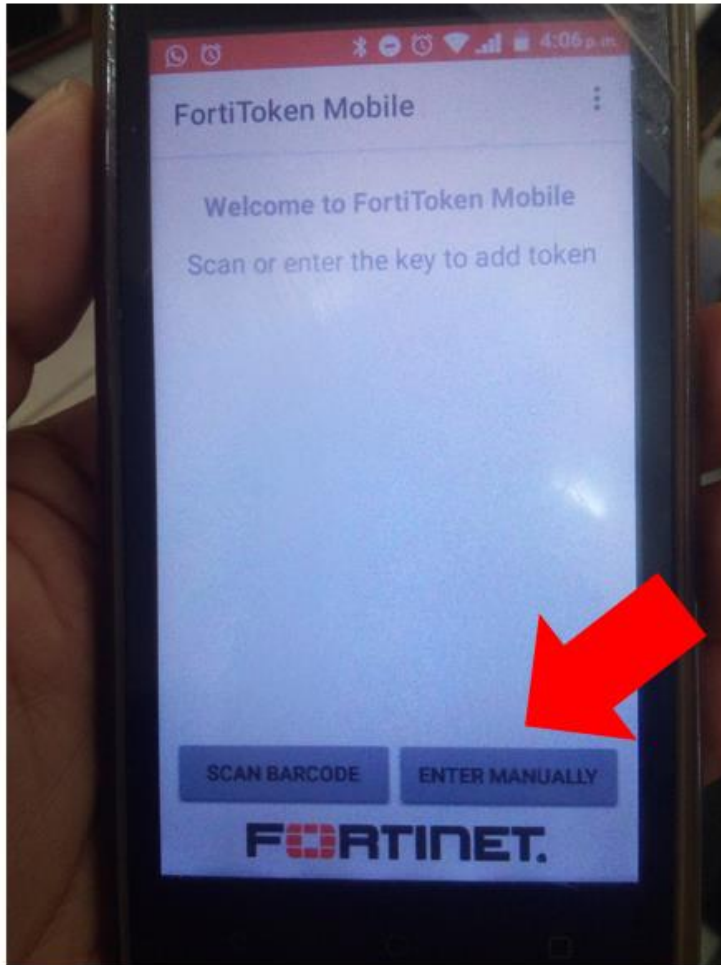
1. Select scan Barcode



2. Scan the Barcode that you can see in your C3Connect Email

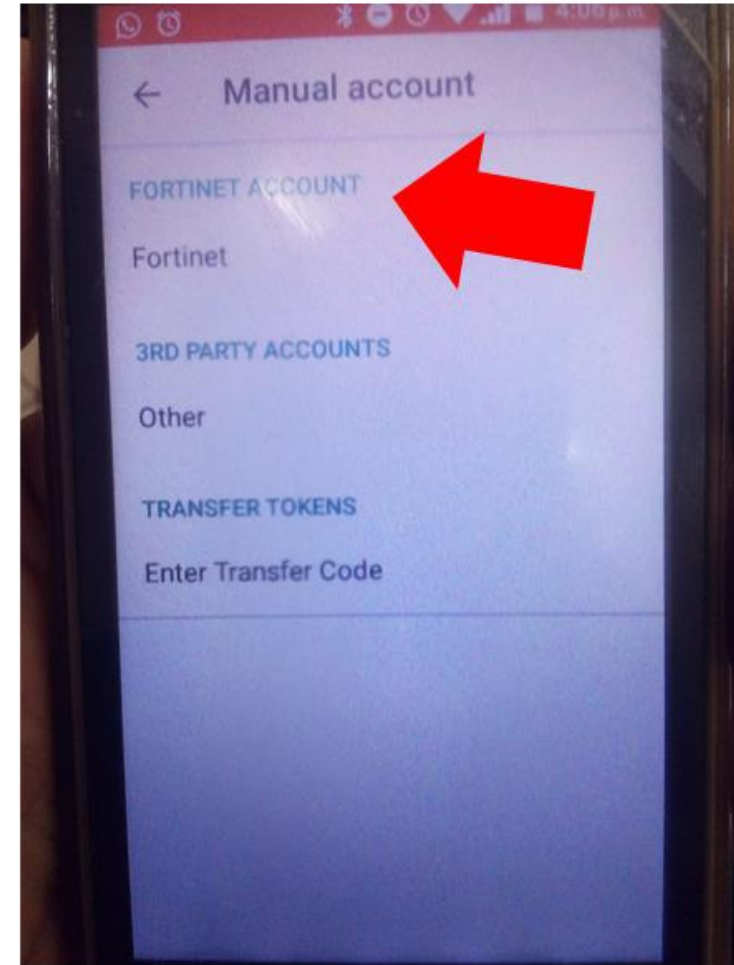
FORTITOKEN CONFIGURATION

2nd Step : Open the app Fortitoken



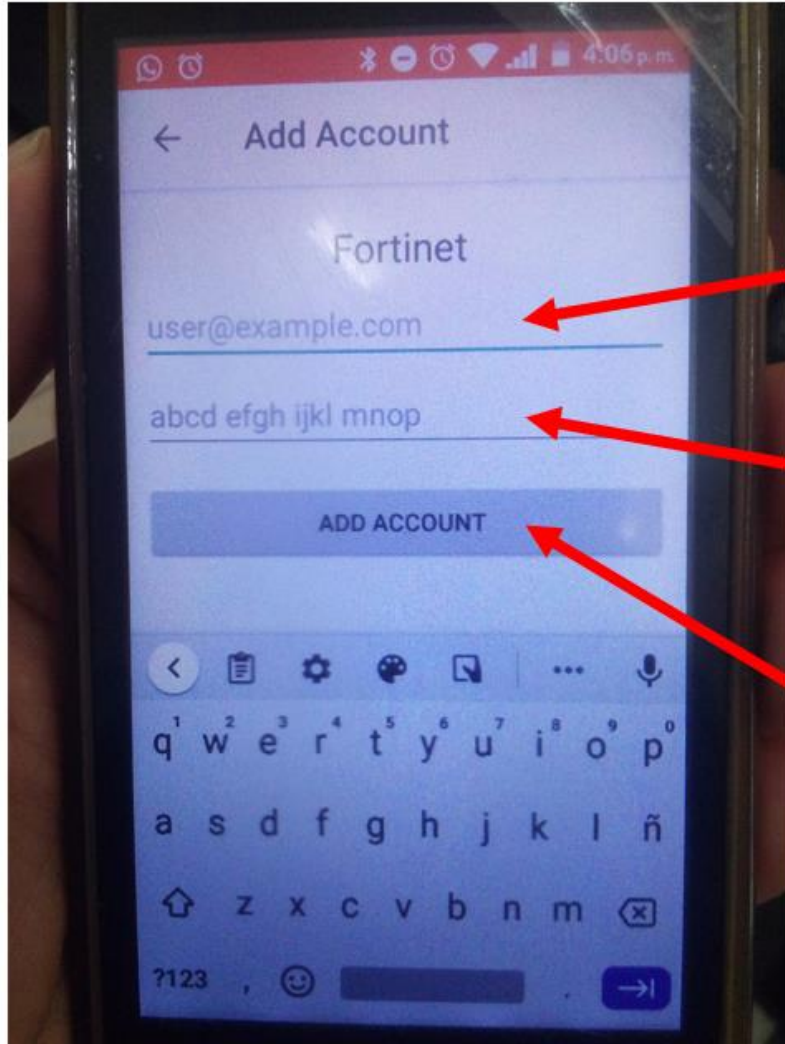
Select
Enter Manually

3rd Step : Select Fortinet Account



FORTITOKEN CONFIGURATION

4th Step : Put in the user and 16 digits code



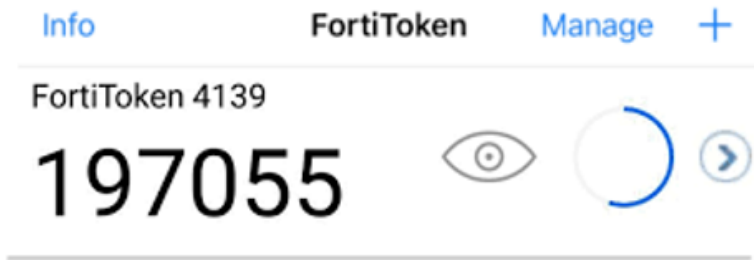
The user is the C3 email, example:
jsmith@C3connect.com

The 16 digits code is provided to the agent by email from Network Team, the 16 digits code looks like:
EEIMMUMPG326AWBF

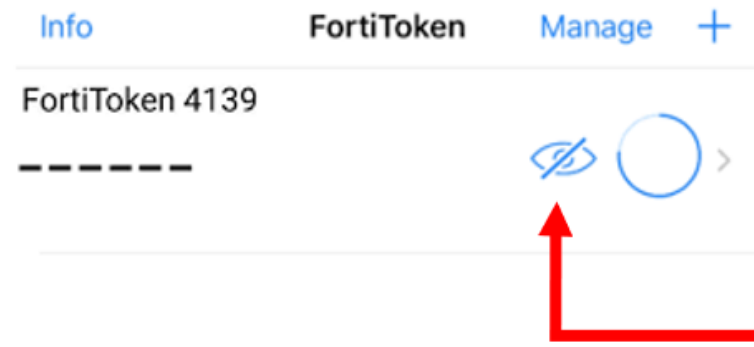
After entering the user and 16 digits code press in ADD ACCOUNT

FORTITOKEN CONFIGURATION

5th Step Review that Fortitoken code appears in the screen



You must see something like this in your screen



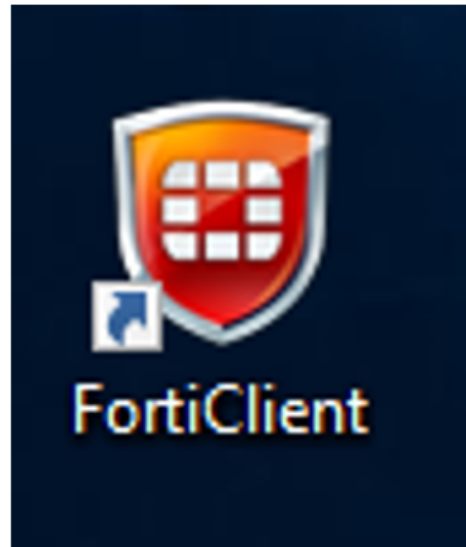
If you can't see the token just press on the eyeball

LOGIN INTO FORTICLIENT / VPN



To login into forticlient, you need to have two things:

- Internet signal
 - Fortitoken installed and configured in your smartphone
- 1st Step : Open Forticlient giving click on the icon below, in your desktop



LOGIN INTO FORTICLIENT / VPN

2nd Step : This window will appear

The screenshot displays the Forticlient VPN login interface. On the left, a blue sidebar contains a user profile for 'jcatalan', a 'REMOTE ACCESS' button, and menu items for 'Notifications', 'Settings', and 'About'. The main content area features a central graphic of a globe and a laptop with a lock icon, indicating a secure connection. Below this graphic is a form for entering VPN credentials. The form includes a dropdown menu for 'VPN Name' (currently set to 'Everise ASH VPN'), and text input fields for 'Username' and 'Password'. At the bottom of the form, there are two unchecked checkboxes: 'Save Password' and 'Auto Connect'. A blue 'Connect' button is positioned below the checkboxes. A red rectangular box highlights the 'VPN Name', 'Username', and 'Password' input fields. A red arrow points from the text 'You must fill these boxes' to the highlighted area.

VPN Name	Everise ASH VPN
Username	
Password	

Save Password Auto Connect

Connect

You must fill these boxes

LOGIN INTO FORTICLIENT / VPN

3rd Step : Select VPN Server

VPN Name: Everise ASH VPN
Personal VPNs
Everise ASH VPN
Everise DAL VPN
 Save Password Auto Connect

4th Step : Put in the username and password and press on connect

VPN Name: Everise ASH VPN
Username: jcatalan
Password:
 Save Password Auto Connect
Connect

The validating percentage will start to increase

Status: 45%
VPN Name: Everise DAL VPN
Username: jcatalan
Password:
Disconnect

A new box will be enabled

VPN Name: Everise DAL VPN
Username:
Password:
Token: Click on 'FTM Push' or enter token code
FTM Push OK Cancel

5th Step : Put in the token's box, the token provided for Fortitoken by your smartphone

VPN Name: Everise DAL VPN
Username:
Password:
Token: 363052
OK Cancel

The validating percentage will start to increase

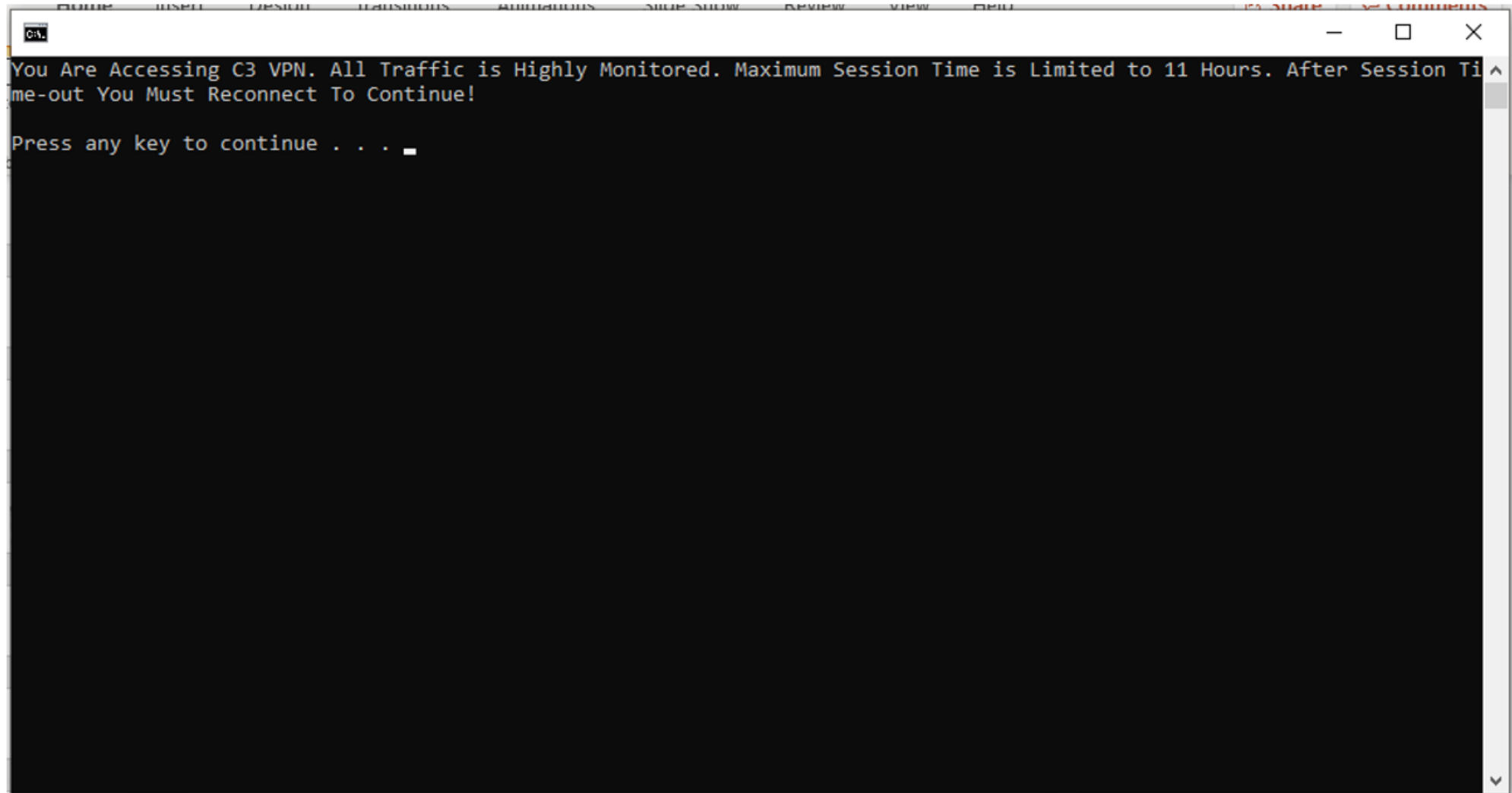
Status: 98%
VPN Name: Everise DAL VPN
Username:
Password:
Disconnect FTM Push

Never press this button

Press on OK

LOGIN INTO FORTICLIENT / VPN

If all process before was made correctly, a window like this will be showed. Just press any key in your keyboard to close it



LOGIN INTO FORTICLIENT / VPN

How to verify that you are connected to Forticlient??

1. You can give double click on the Forticlient icon and the follow window will appear



2. You can see in the lower right corner and will appear a green shield with a yellow lock on it. This yellow lock means that you are connected to Forticlient



If you can't see the green shield in the lower right corner, you can press this triangle to open more icons.

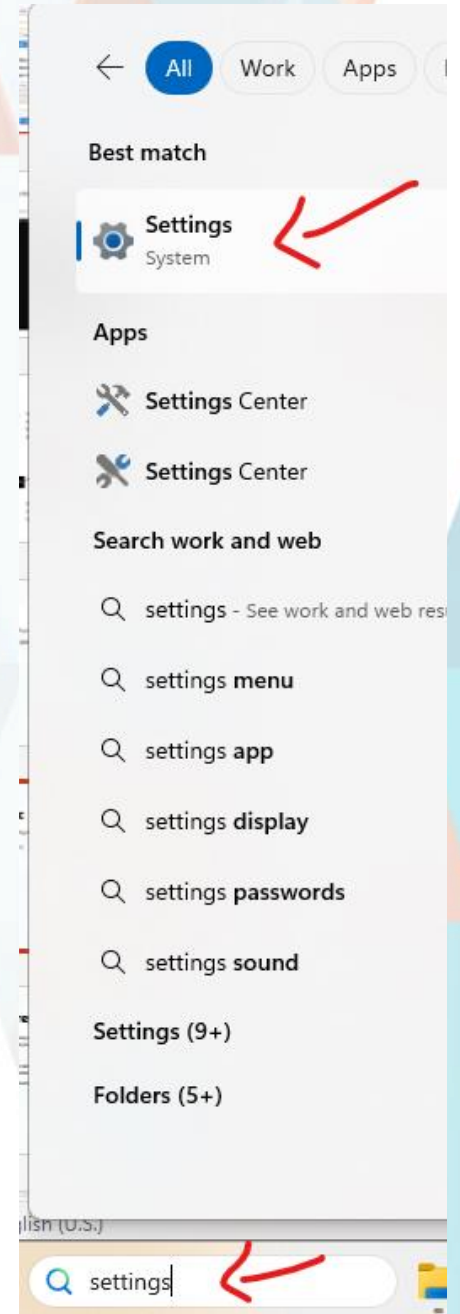
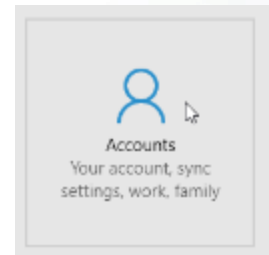
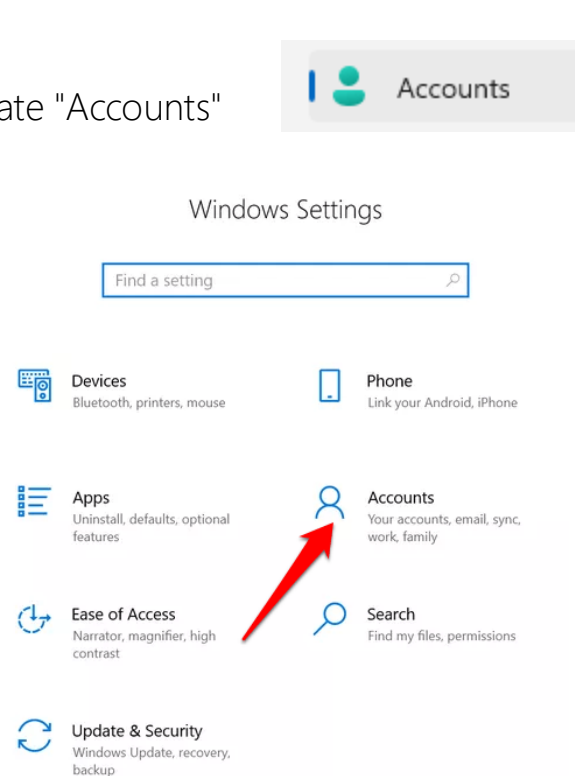


Trouble-Shooting

- The FortiToken Email QR code will expire 48 hours after it has been sent. If you are trying to activate after the 48 hours, you will need to get in touch with IT during OBE for assistance.
- If locked out tried to log in 2 times and were still unable to be successful, please stop and let IT know during your OBE as you can lock yourself out of your account if you try too many times.

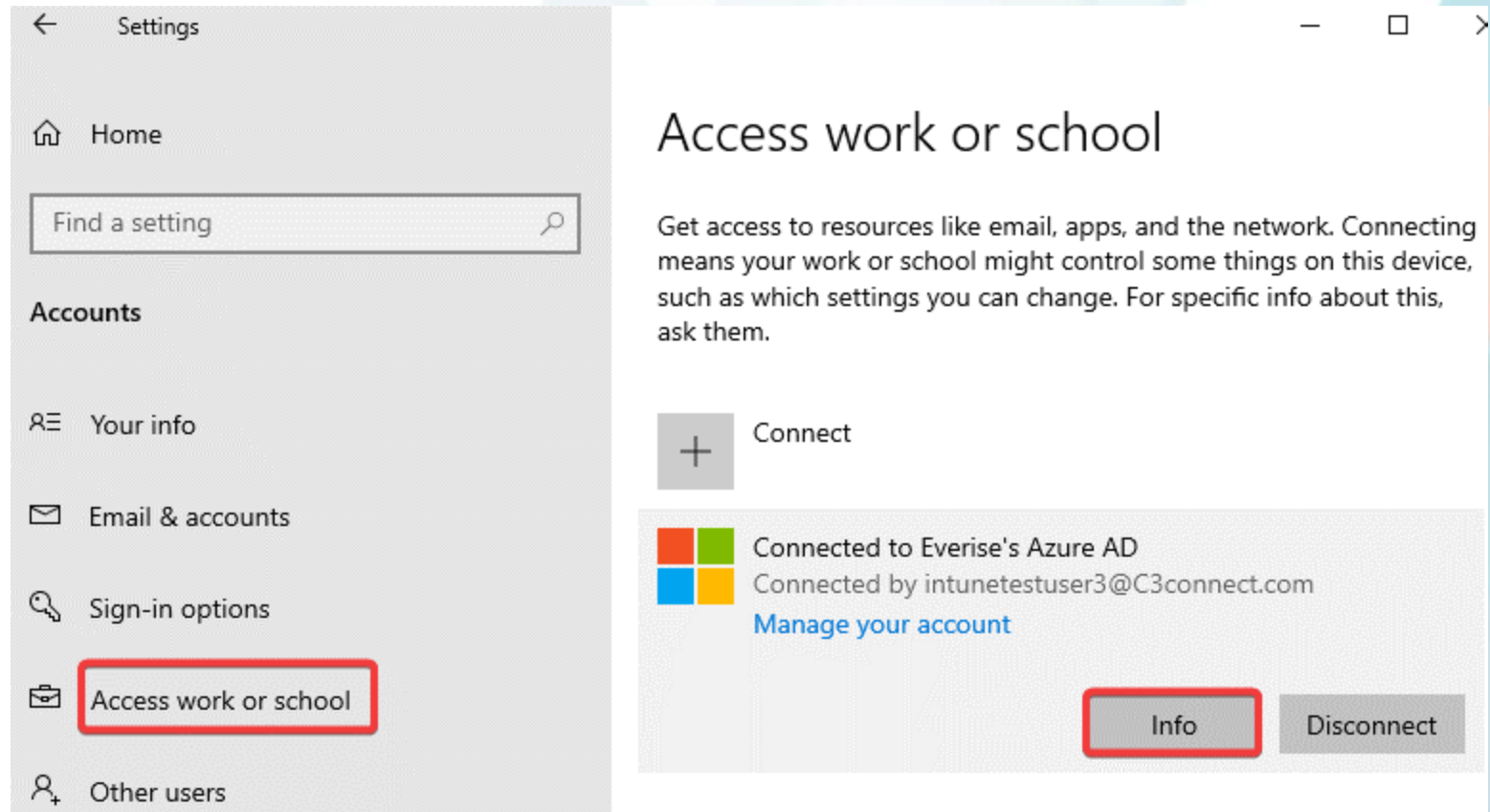
InTune Set Up & Sync

- To verify your computer is completely set up and ready for Training, please follow the following instructions.
- 1. Go to the Settings on your computer. (In the search bar, type "Settings")
- 2. Click on Settings
- 3. Under Settings, locate "Accounts"



InTune Set Up & Sync

- 4. Click "Access work or school" on left
- 5. Under "Connected to Everise's Entra AD" or "Connected to Everise's Azure AD", ensure the email address listed is your C3Connect email address.
 - If the email address is not your C3Connect email address, please stop as IT will need to assist you on OBE day in the Software break out room.
 - If your email is your C3Connect email address, proceed
- 6. Click on the "Connected to..." box
- 6. Click "Info"



InTune Set Up & Sync

- In the Info page, scroll down until you see "Device sync Status"
- Look for "Last Attempted Sync"
- If the date and time were within your set up time, then you are connected and ready to go.

- If you see "The sync could not be initiated (0)" or any other error message, IT will need to assist you on OBE day in the Software break out room

Device sync status

Syncing keeps security policies, network profiles, and managed applications up to date.

Last Attempted Sync:

The sync could not be initiated (0)

None

Connection info

Management Server Address:

<https://r.manage.microsoft.com/devicegatewayproxy/cimhandler.ashx>

Exchange ID:

8B2E87F40D3450A44D3B28E13B23B3AA

Device sync status

Syncing keeps security policies, network profiles, and managed applications up to date.

Last Attempted Sync:

The sync was successful
8/11/2023 8:32:01 AM



Sync

How to Prepare for OBE Day

1. On OBE Day, your Trainer will start the class by checking to see how far everyone got in their set up journey
2. Based on your response, you will be put into break-out rooms to continue your OnBoarding.
3. When you come into the room, be ready to be grouped in the following:
 - o Hardware issues – You have issues setting up the equipment, not turned on, etc (This does not include your second monitor not connecting as this could be a driver issue that will resolve during the day.)
 - o Software/Login Issues – You have successfully plugged in the equipment and it is working, but you have issues with:
 - Logging into the computer
 - Logging into your email account
 - Not completed Jarvis set up
 - Not completed InTune Set up
 - Not completed FortiToken/Client set up
 - o Completed set up – You have completed both set up and login instructions and are ready to begin compliance courses

We are
EVERISE

Thank you.

