

Okta Identity Engine

End-User Email Communication Templates

##

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Version 1.0

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| Document Purpose and Use |

The purpose of this document is to provide example email templates for Okta’s customers to use when communicating to their end users about upcoming changes related to Okta. This document covers upgrading to Okta Identity Engine and deploying Okta FastPass for login.

Okta recommends a series of notifications for each change, allowing Okta’s customers’ end users ample time to adjust to, prepare for, and adopt the change.

Please note that all placeholder text in the email templates has been <bracketed and made red>. Please make edits to placeholder text accordingly before sending to end users, and tailor the content to your specific deployment of Okta.

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| Identity Engine Upgrade Email Templates |

## Email Template 1: Prepare for upgrade to Identity Engine (no FastPass)

**Purpose of Email:**

To introduce your users to the upgrade an to ready them for the upcoming changes when your environment is upgraded to Okta Identity Engine

**Recommended Timing of Delivery:**

As early in the project lifecycle as permits, but to prevent this information from becoming stale, Okta recommends 15-30 days in advance of the upgrade event that enables Okta Identity Engine into your user environment. If users need to update their operating system or remove Okta Mobile, this will give them enough time to take action.

**Subject:**

Get ready for the new Okta login experience at <customer name>

**Body of Email:**

I’m excited to announce that we will soon upgrade our Okta deployment to the Okta Identity Engine. This upgrade allows us to make our Okta experience more seamless and more secure. When this is released, you may see a few changes to your login experience:

* We’ve removed the security image at the top of the login page
* <If applicable><It will be easier to switch between security methods for multi-factor authentication when logging in>
* <If applicable><We will update the experience for self-service password reset>
* <If applicable><We will make it possible to use either SMS or Voice Call as security methods when you login>

Please be on the lookout for additional emails as we get closer to deploying this new Okta experience. We are carefully working with Okta and <our internal IT and application teams> to ensure a smooth transition, and we will be alerting you to upcoming milestones and additional information as we get closer to our Go-Live date.

If you have any questions, please contact the <enter help desk contact info, by region if necessary>.

# Email 1: New Dashboard is Coming Announcement

## Email Template 2: Prepare for upgrade to Identity Engine with Okta FastPass

**Purpose of Email:**

To introduce your users to the upgrade and to make them aware of upcoming changes when your environment is upgraded to Okta Identity Engine and for the introduction of Okta FastPass.

**Recommended Timing of Delivery:**

As early in the project lifecycle as permits, but to make sure that users have enough time to take action, Okta recommends 15-30 days in advance of the upgrade event that enables Okta Identity Engine into your user environment. If users need to update their operating system or remove Okta Mobile, this will give them enough time to take action.

**Subject:**

Get ready for the new Okta login experience at <customer name>

**Body of Email:**

I’m excited to announce that we will soon upgrade to Okta Identity Engine and roll out a more streamlined login experience for <customer name>. This upgrade allows us to make our Okta experience more seamless and more secure.

To ensure that you are ready to take advantage of the new features, you may need to take a couple actions:

* <If applicable><Upgrade your machine to the latest operating system supported by your business unit>
* Update your mobile Okta Verify app to the latest version available on your mobile platform’s app store
* <If applicable><Unenroll and remove the Okta Mobile app>

We’re thrilled that this new login experience will make things easier for you to login, while helping keep you more secure as well.

Please be on the lookout for additional emails as we get closer to deploying this new Okta experience. We are carefully working with Okta and <our internal IT and application teams> to ensure a smooth transition, and we will be alerting you to upcoming milestones and additional information as we get closer to our Go-Live date.

If you have any questions, please contact the <enter help desk contact info, by region if necessary>.

## Email Template 3: Reminding users to remove Okta Mobile app

**Purpose of Email:**

Okta Identity Engine does not support Okta Mobile. To prevent users from seeing an error after upgrading, we recommend end users to proactively unenroll from Okta Mobile.

**Recommended Timing of Delivery:**

To give users enough time to unenroll, we recommend sending this out at least 14 days in advance of the upgrade event and sending this email after the “Preparing for upgrade” emails.

**Subject:**

[Action Required] Remove Okta Mobile application from your mobile device

**Body of Email:**

You have received this message because you have used the Okta Mobile application with <your Okta org URL> within the 30 days. We recommend that you remove the Okta Mobile application from any mobile device you own before the Okta Identity Engine Upgrade on <upgrade date>. Okta Mobile will no longer be supported once we have upgraded to the Okta Identity Engine.

When the Okta Mobile application is removed, you will still be able to access Okta through your mobile device directly from your mobile browser by navigating directly to <your Okta org URL>. Applications that use a username and password will no longer support password autofill on mobile devices, but you will still be able to copy and paste your password for the apps where you have saved the password.

The following applications, managed by <IT>, are unsupported on mobile browsers. You must use a desktop browser with the Okta plugin installed to access these applications: <List of SWA applications where the admin has disabled password reveal for end users>

If you have any questions, please contact the <enter help desk contact info, by region if necessary>.

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## Email Template 4: Okta Identity Engine upgrade completed, no Okta FastPass

**Purpose of Email:**

To tell your users that the Okta login experience has changed. Make them aware of where to go if they have questions.

**Recommended Timing of Delivery:**

When the Okta Identity Engine upgrade is complete and you have completed end to end feature validation of your organization.

**Subject:**

The new Okta login experience is live!

**Body of Email:**

*TL;DR: We’re introducing a new Okta login experience today— please read below for how this impacts you.*

I’m excited to announce that our new login experience for <Company Name> is now live!

Starting today, you’ll notice a few changes to the login page.

* The security image underneath the logo has been removed.
* <if applicable><The password field has been removed.>
* <if applicable><The **Remember me** checkbox has been changed to **Keep me signed in**.>
* <If applicable><It’s easier to switch between security methods for multi-factor authentication when logging in>
* <If applicable><We’ve updated the experience for self-service password reset>
* <If applicable><We’ve made it possible to use either SMS or Voice Call as security methods when you login>

 **Old Login Experience: New Login Experience:**

**<Insert your own screenshot> <Insert your own screenshot>**

Additional instructions can be found in [Okta’s end user documentation](https://help.okta.com/okta_help.htm?type=eu&id=ext-sign-in-flows) or <link to your help article>.

If you have any questions, please contact the <enter help desk contact info, by region if necessary>.

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## Email Template 5: Okta Identity Engine upgrade completed, with Okta FastPass

**Purpose of Email:**

To tell your users that the Okta login experience has changed, Okta FastPass is now live, and they can download Okta Verify on desktop. Make them aware of where to go if they have questions.

**Recommended Timing of Delivery:**

When the Okta Identity Engine upgrade is complete and you have completed end to end feature validation of your organization.

**Subject:**

The new Okta login experience is live!

**Body of Email:**

*TL;DR: We’re introducing a new Okta login experience today— please read below for how this impacts you.*

I’m excited to announce that our new login experience for <Company Name> is now live!

Starting today, you’ll notice a few changes to the login page.

* There is a new **“Sign in with Okta FastPass”** button on the login page.
* The security image underneath the logo has been removed.
* <If applicable><The password field has been removed.>
* <If applicable><It’s easier to switch between security methods for multi-factor authentication when logging in>
* <if applicable><The **Remember me** checkbox has been changed to **Keep me signed in**.>

 **Old Login Experience: New Login Experience:**

**<Insert your own screenshot> <Insert your own screenshot>**

**Use Username & Password to Log In**

You can continue to login as you’ve always done using your password by entering your **Username** first and clicking the **Next** button to enter your password and perform multi-factor authentication (if required).

**Use Okta FastPass to Log In**

However, you can also use the Okta Verify app onto your laptop to login for added security. To do this, click the **“Sign in with Okta FastPass”** button.

**Download Okta Verify & Register**

If you don’t have the Okta Verify desktop app installed on your laptop, you will be taken through a quick enrollment flow the very first time you click on that **“Sign in with Okta FastPass”** button.

1. Click on the “download & run Okta Verify” link at the bottom. You will be redirected to the app store.
2. Follow instructions to install Okta Verify. Once installed, open up Okta Verify. You will see the option to add your account.
3. Click on “Add Account” and enter your Okta URL: [<](http://okta.okta.com/)Your org URL> & click Next
4. If you have extra biometric security features on your laptop such as Apple TouchID or Windows Hello, you will be asked if you want to enable extra verification. Click “Enable” if you want to use this extra biometric functionality. Otherwise, click “Not now”. Both options are acceptable to continue.
5. Now you have Okta Verify installed and registered. Go back to the Okta login page and press the **“Sign in with Okta FastPass”** button to login without entering your username or password as frequently.

These instructions can also be found in [Okta’s documentation](https://help.okta.com/okta_help.htm?type=eu&id=ext-ov-user-overview) or <link to your help article>.

Please note that although the Okta Verify mobile app will continue to work as additional security methods after the upgrade, **you will need to manually enroll your Okta Verify mobile app to get the FastPass experience on a mobile browser.** Those instructions are found in [Okta’s end user documentation for iOS](https://help.okta.com/okta_help.htm?type=eu&id=csh-user-ov-manage-account-ios) and [Android](https://help.okta.com/eu/en-us/Content/Topics/end-user/ov-mng-account-android.htm) or <link to your help article>. Additionally, you will avoid issues with enrollment if you remove any duplicate instances of [<](http://okta.okta.com/)Your org URL> in your mobile Okta Verify app.

We’re excited to bring you a new seamless login experience, while helping keep you more secure as well. If you have any questions, please contact the <enter help desk contact info, by region if necessary>.