

User guide

Managed File Transfer - MFT
Logging In & Authentication



Table of contents

| | |
|---|----|
| First Time Login | 3 |
| First Time Login - Google Authenticator | 5 |
| First Time Login - Okta Verify | 7 |
| First Time Login - Phone (SMS Text) | 9 |
| Change Security Method or Password | 10 |
| Logging In | 12 |
| Logging in - Google Authenticator | 14 |
| Logging in - Okta Verify | 15 |
| Logging in - Phone (SMS Text) | 16 |
| Technical Support | 17 |

First Time Login

Welcome to the BOK Financial Managed File Transfer System

Welcome to the **BOK Financial Managed File Transfer (MFT) System**, located at <https://mft.bokf.com>. This system will allow you to simply and securely upload and download Lockbox, ACH, Recon, and other types of files to and from the Bank.

This document will provide the instructions you need to get up and running in the MFT System quickly and easily.

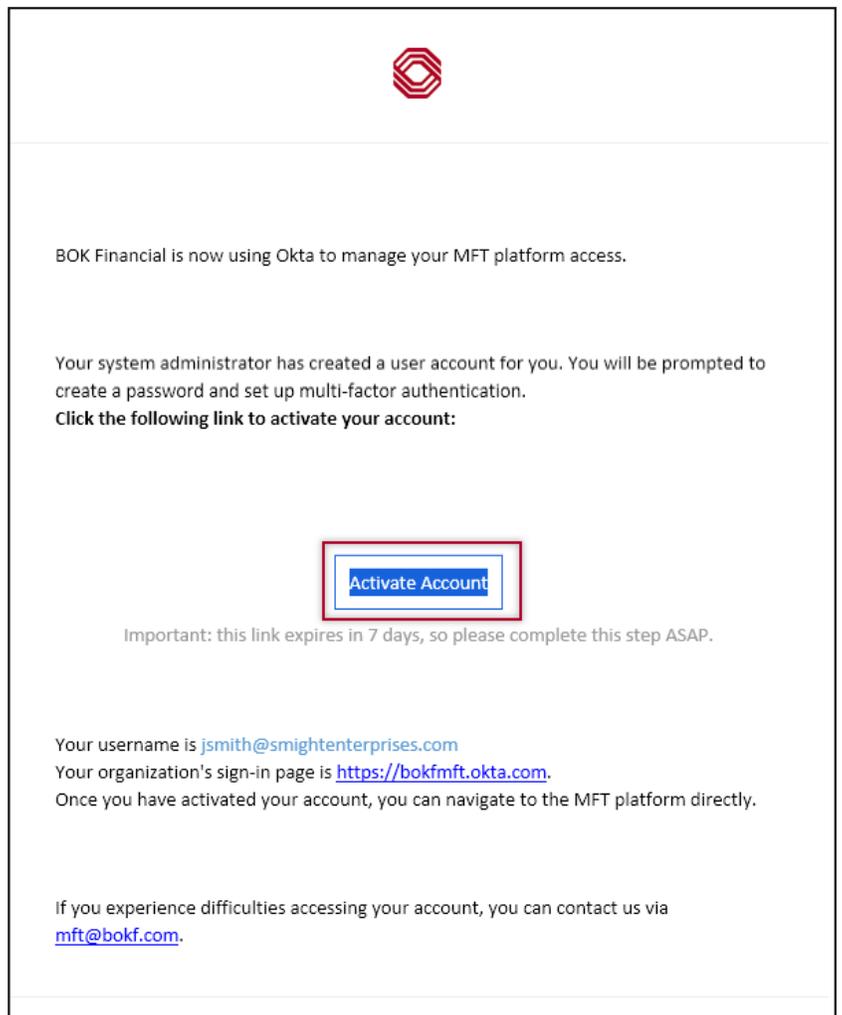
Enrolling in Okta

To get started, you will need to be enrolled in Okta. Okta is a US-based access management and identity company that we use to provide secure connections.

When your account is setup for the BOK Financial Managed File Transfer System, an Okta account is also created for you. Okta will be used to authenticate/verify your identity and log you into the Managed File Transfer System.

Shortly after account creation, you should receive an e-mail from Okta, noreply@okta.com to activate your new account.

Click the blue "Activate Okta Account" link, and a pop-up window opens for you to create your password.



The screenshot shows an email notification from Okta. At the top is the Okta logo. The main text reads: "BOK Financial is now using Okta to manage your MFT platform access." Below this, it states: "Your system administrator has created a user account for you. You will be prompted to create a password and set up multi-factor authentication. Click the following link to activate your account:" A blue button with the text "Activate Account" is highlighted with a red rectangular box. Below the button, it says: "Important: this link expires in 7 days, so please complete this step ASAP." At the bottom, it provides the username jsmith@smightenterprises.com, the sign-in page <https://bokmft.okta.com>, and contact information mft@bokf.com.



First Time Login

Create a new password that adheres to the password requirements shown below. Please enter that new password into the “Enter password” and “Re-enter password” fields and click the blue “Next” button.

Set up password
jsmith@smithenterprises.com

Password requirements:

- At least 8 characters
- A lowercase letter
- An uppercase letter
- A number
- A symbol
- No parts of your username
- Does not include your first name
- Does not include your last name
- Your password cannot be any of your last 10 passwords

Enter password

Re-enter password

Next

Next, you must choose your multi-factor security method. You may choose any one (or more) of the following. To make your selection, click “Set up” under your chosen method.

Set up security methods
jsmith@smithenterprises.com

Security methods help protect your Okta account by ensuring only you have access.

Set up required

- Google Authenticator**
Enter a temporary code generated from the Google Authenticator app. Used for access
Set up
- Okta Verify**
Okta Verify is an authenticator app, installed on your phone, used to prove your identity. Used for access
Set up
- Phone**
Verify with a code sent to your phone. Used for access or recovery
Set up

Once the first security method setup is complete, you are directed back to the list of remaining options. You may choose to setup another or click the blue “Setup later” button to continue into the platform.

Set up security methods
jsmith@smithenterprises.com

Security methods help protect your Okta account by ensuring only you have access.

Set up optional

- Google Authenticator**
Enter a temporary code generated from the Google Authenticator app. Used for access or recovery
Set up
- Okta Verify**
Okta Verify is an authenticator app, installed on your phone, used to prove your identity. Used for access or recovery
Set up

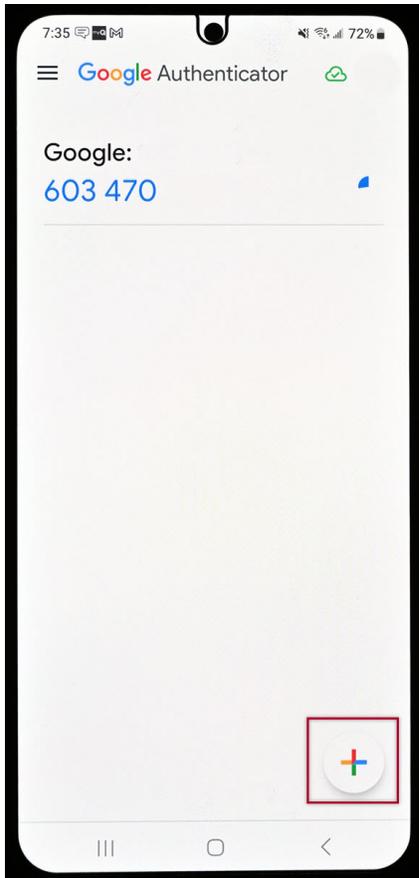
Set up later

[Back to sign in](#)

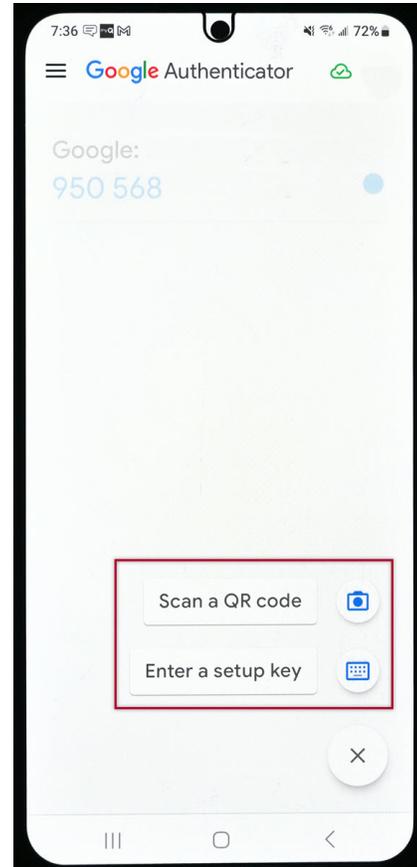
First Time Login - Google Authenticator



If you elected "Google Authenticator" as your method of authentication, first, you must download the app from your mobile device App Store then launch Google Authenticator.



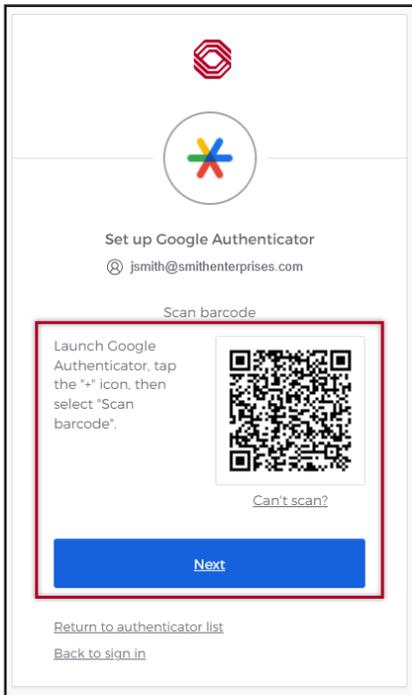
Once you have downloaded and launched the Google Authenticator app, your phone screen will be similar to what is shown here. If you use other applications with Google Authenticator, you may have an existing program listed. To add MFT, select the "+" sign to add another.



Next, select "Scan a QR Code".

First Time Login - Google Authenticator

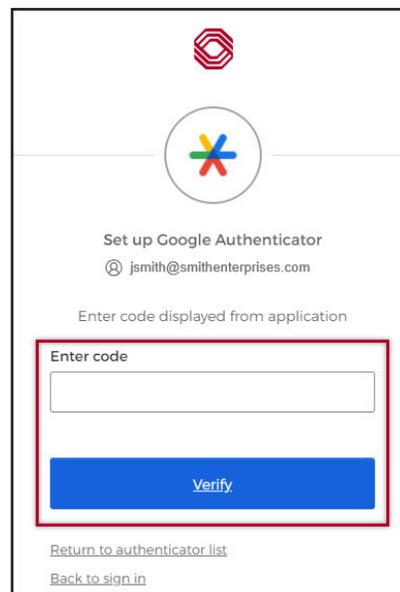
To scan the QR code, hold your phone to the image on your computer screen and your phone will automatically capture the image. When it is complete, click the blue "Next" button.



You will now see the authentication codes for the MFT application in addition to others you may be using. Be sure to use the right code for MFT when time to authenticate.



Enter the current code displayed in the Google Authenticator app for MFT in the "Enter code" field, then click the blue "Verify" button. When the Google Authenticator sync is complete, you are directed back to the "Set up security methods" options.



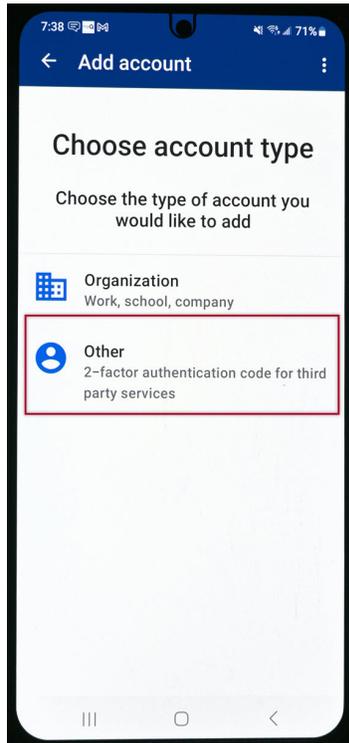
First Time Login - Okta Verify



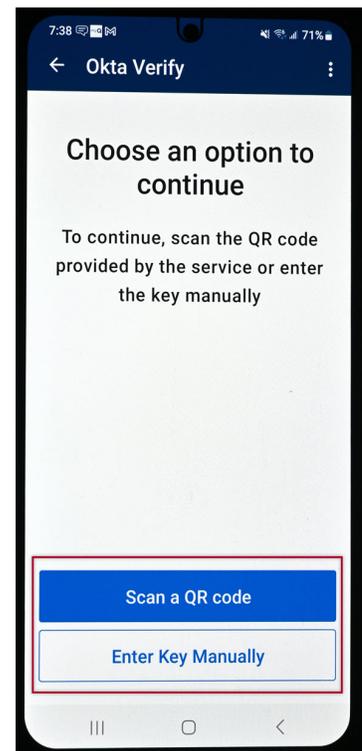
If you elected "Okta Verify" as your method of authentication, first, you must download the app from your mobile device App Store then launch Okta Verify. Okta Verify is the preferred security method to use with MFT.



Once you have downloaded and launched the Okta Verify app, your phone screen will be similar to what is shown here. If you use other applications with Okta Verify, you may have an existing program listed. To add MFT, select the "+" sign to add another.



You are then provided two options, select "Other" which is used for two-factor authentication.



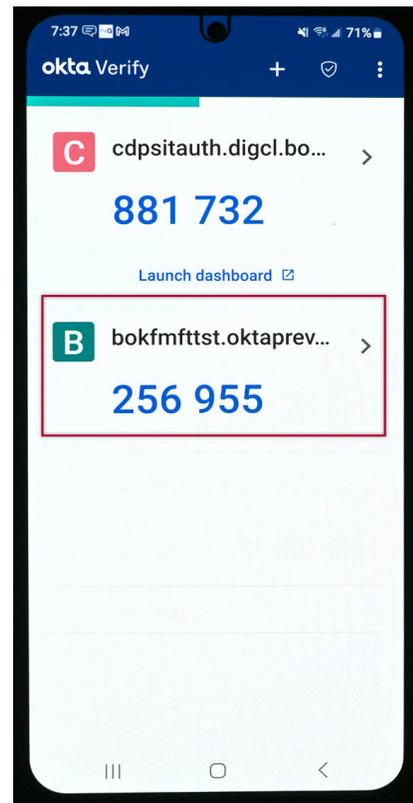
Next, select "Scan a QR code".

First Time Login - Okta Verify

To scan the QR code, hold your phone to the image on your computer screen and your phone will automatically capture the image and sync. When it is complete select "Done" on the app.



You will now see the authentication codes for the MFT application in addition to others you may be using. Be sure to use the right code for MFT when time to authenticate. Since Okta Verify has "Authentication Code" and "Push Notification" options, both are automatically selected and push notification will be the default. This can easily be adjusted by selecting the MFT account in the app and unchecking the method you do not want to use and will not appear as an option in MFT.



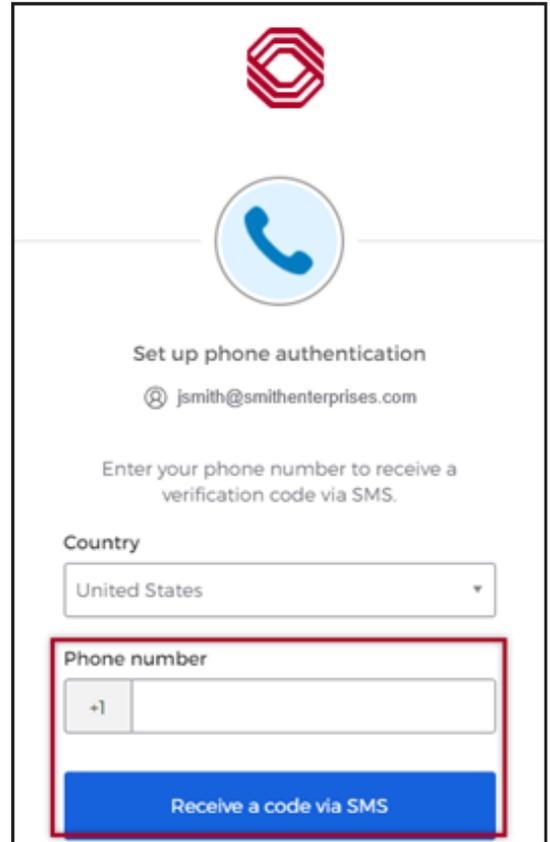
When the Okta Verify sync is complete, you are directed back to the "Set up security methods" options.

First Time Login - Phone (SMS Text)

If you elected "Phone" as your method of authentication, you will receive a screen to input the cell phone number for SMS texts.

Enter your ten-digit cell phone number into the "Phone number" field, then click the blue "Receive a code via SMS" button.

Your phone will receive a text message stating, "Your verification code is #####".



Set up phone authentication

jsmith@smithenterprises.com

Enter your phone number to receive a verification code via SMS.

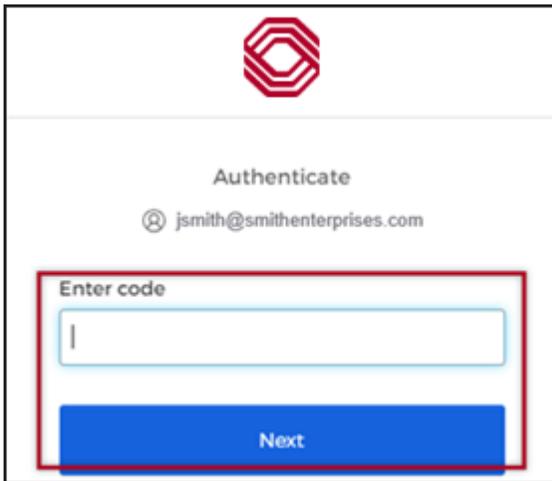
Country

United States

Phone number

+1

Receive a code via SMS



Authenticate

jsmith@smithenterprises.com

Enter code

Next

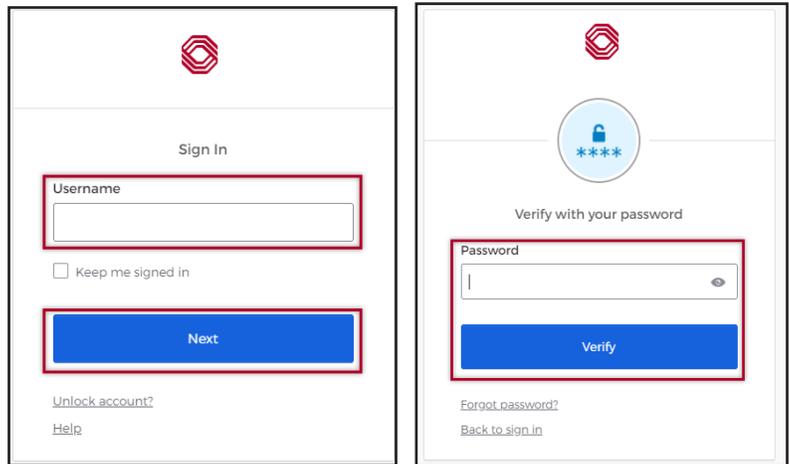
You should now see this authentication prompt:

Enter the verification code that you just received on your phone into the "Enter code" field and click the blue "Next" button.

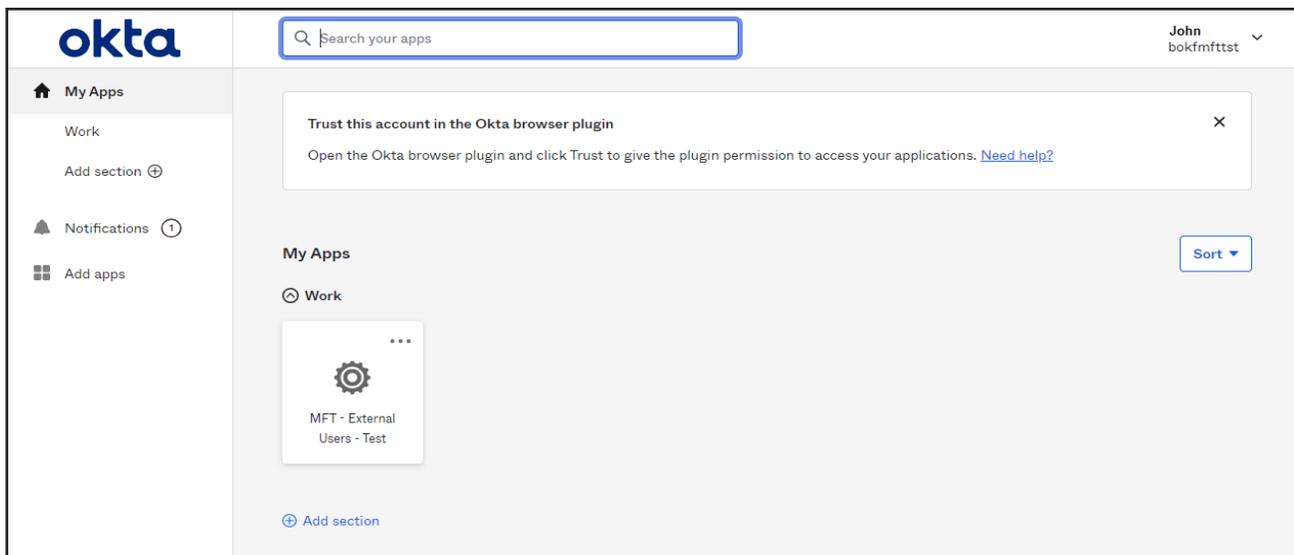
You are directed back to the "Set up security methods" options.

Change Security Method or Password

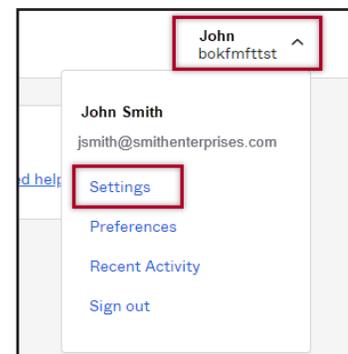
Should you want to make changes to your Security Method, including password, access your Okta account at <https://bokfimt.okta.com>. Login with the same “Username” and “Password” as MFT. You will also be required to authenticate before your access to Okta is complete.



Once logged into Okta, you will receive a landing page similar to the one below.



To begin the process of changing security method or password, click “Your Name” in the top right corner of the screen to display the menu. Then click “Settings”.

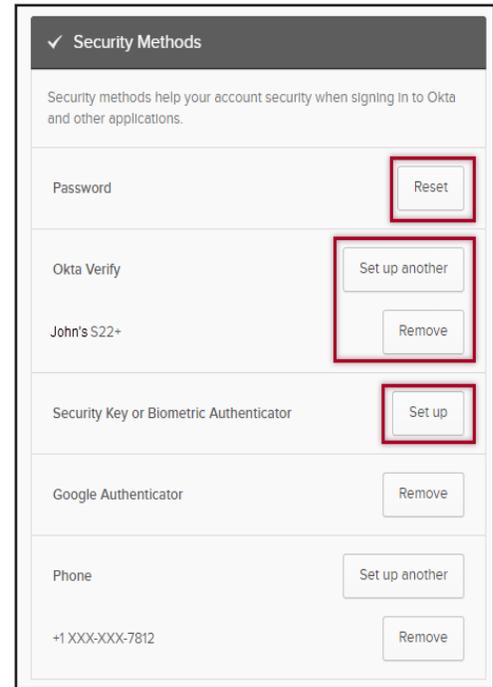
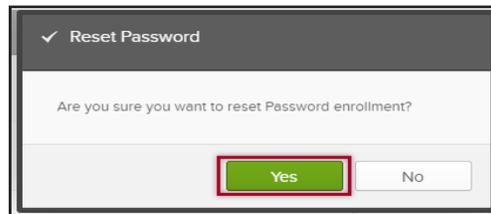


Change Security Method or Password

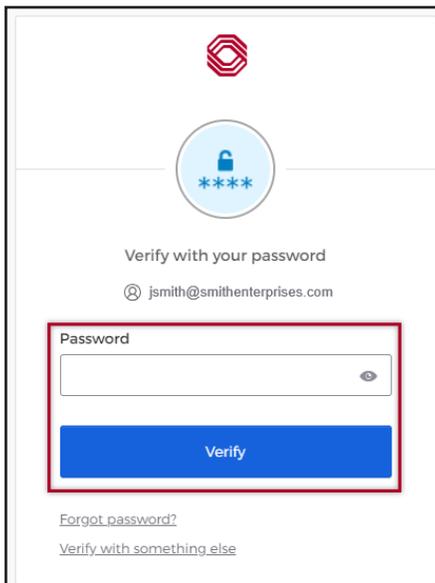
- To remove a particular security method, click “Remove” next to the method to be removed.
- To add a security method, click “Setup” next to the one to add. You will follow the same setup process as shown in previous pages of this guide.
- Some security methods allow for multiple phones. Click “Set up another” to add another phone.
- For all changes, you will go through the authentication process currently setup before changes can be made.

To change your password, click “Reset” next to password.

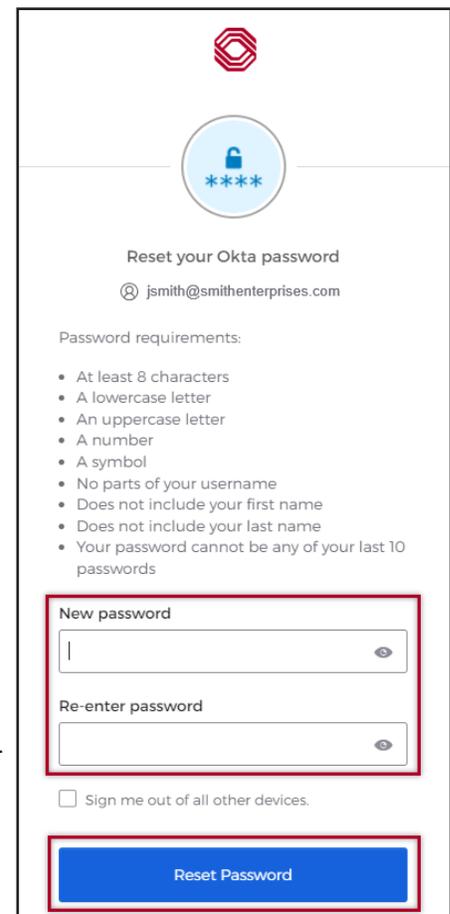
A pop up display appears confirming the password reset, click “Yes”.



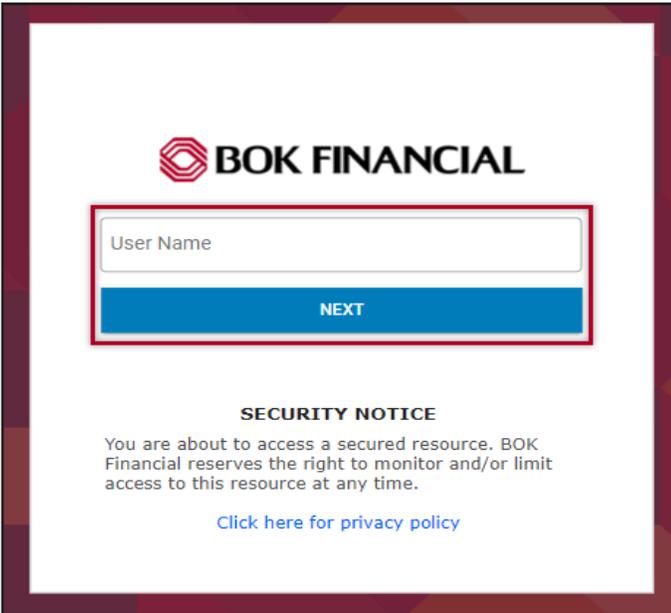
Input your current “Password” and click the blue “Verify” button. You will authenticate using your security method.



Then you will input your new password in both the “New password” and “Re-enter password” fields. When complete, click the blue “Reset Password” button. You will receive a successful message when the new password is accepted.



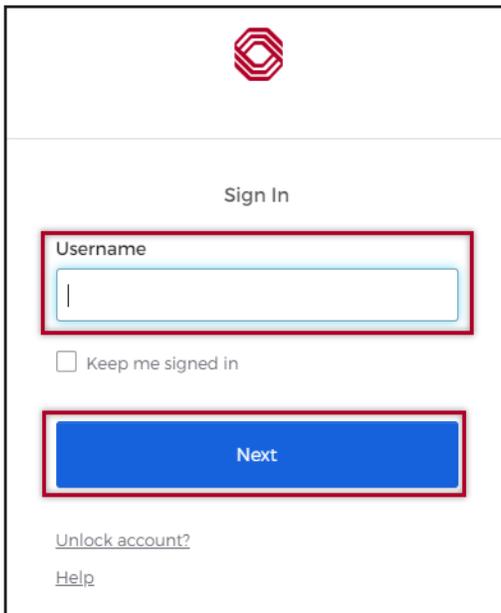
Logging In



The image shows the BOK Financial login prompt. At the top is the BOK Financial logo. Below it is a form with a "User Name" input field and a blue "NEXT" button. Underneath the form is a "SECURITY NOTICE" section with a link to the privacy policy.

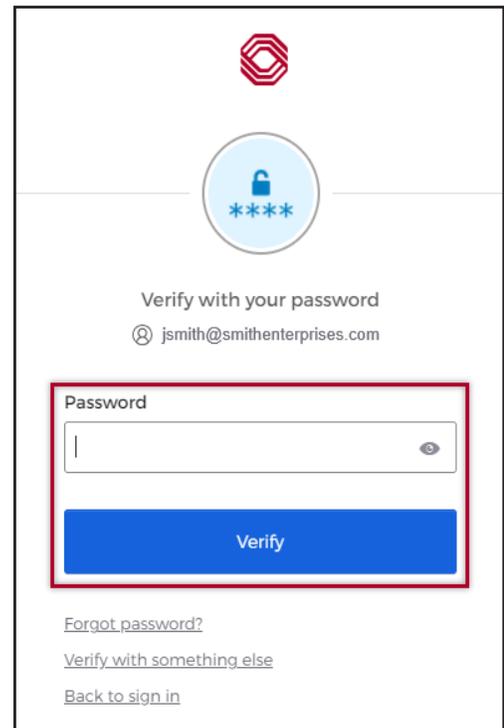
Each time you open <https://mft.bokf.com> going forward, you will receive this login prompt. Input your "User name" and click the blue "Next" button.

You will be directed to an Okta "Username" prompt. Enter your "Username", then click the blue "Next" button. This step may not appear each time you login.



The image shows the Okta "Username" prompt. It features the Okta logo at the top, followed by the text "Sign In". Below this is a "Username" input field and a blue "Next" button. There is also a checkbox for "Keep me signed in" and links for "Unlock account?" and "Help".

Key in your Okta "Password" followed by clicking the blue "Verify" button.

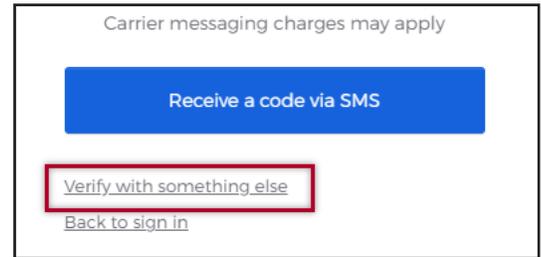


The image shows the Okta "Password" prompt. It features the Okta logo at the top, followed by a circular icon with a lock and "****". Below this is the text "Verify with your password" and the email address "jsmith@smithenterprises.com". There is a "Password" input field and a blue "Verify" button. At the bottom, there are links for "Forgot password?", "Verify with something else", and "Back to sign in".

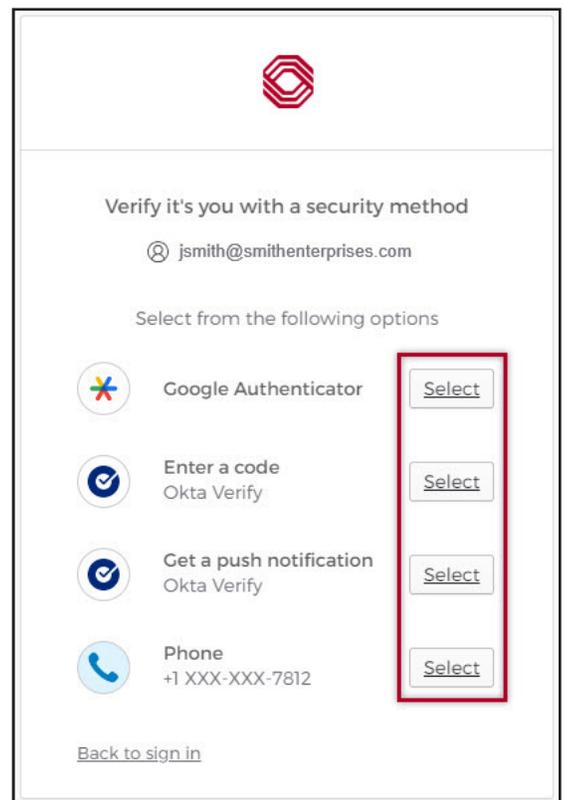


Logging In

A prompt will display for your chosen authentication method. If you have elected multiple methods, the selection will be random but you can change to "Verify with something else" by clicking the link under the displayed security method.

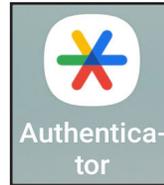


The list of elected security methods are displayed. Click "Select" next to the one you wish to authenticate with for this login.



Logging In - Google Authenticator

Launch the Google Authenticator app on your mobile phone.



Key in the code currently displayed for MFT in Google Authenticator into the "Enter code" field and click the blue "Verify" button. Codes change every 60 seconds.

You are then directed to the MFT landing page.

If you experience any issues while logging in, please consult the Technical Support section.

A screenshot of a web application's verification screen. At the top, there is a red hexagonal logo. Below it is a circular icon with the same colorful 'X' logo as the app icon. The text 'Verify with Google Authenticator' is centered, followed by the email address 'jsmith@smithenterprises.com' with a small circular icon to its left. Below this, the instruction 'Enter the temporary code generated in your Google Authenticator app' is displayed. A red rectangular box highlights the 'Enter code' input field, which contains a single vertical bar cursor, and a blue 'Verify' button below it. At the bottom of the screen, there is a link that says 'Back to sign in'.

Logging In - Okta Verify Authentication

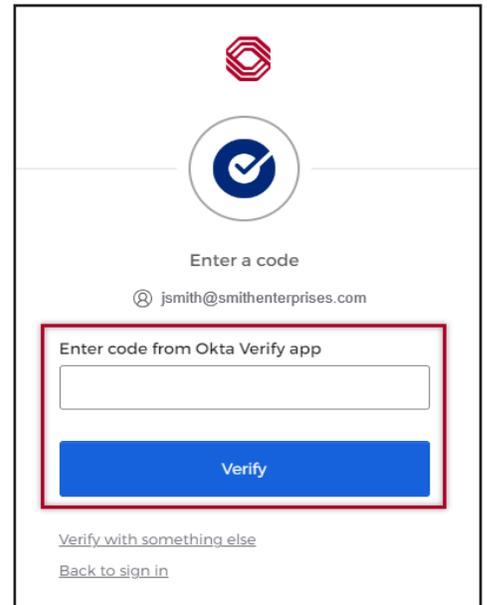
If “Okta Verify Enter a Code” is selected, launch the Okta Verify app on your mobile phone.



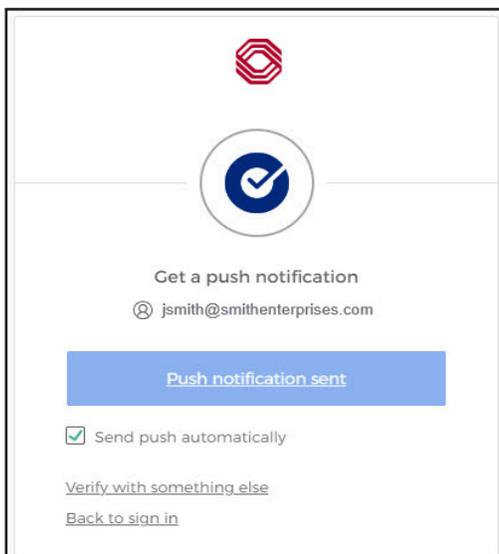
Key in the code currently displayed for MFT in the Okta Verify app into the “Enter Code from Okta Verify app” field and click the blue “Verify” button. Codes change every 60 seconds.

You are then directed to the MFT landing page.

If you experience any issues while logging in, please consult the Technical Support section.

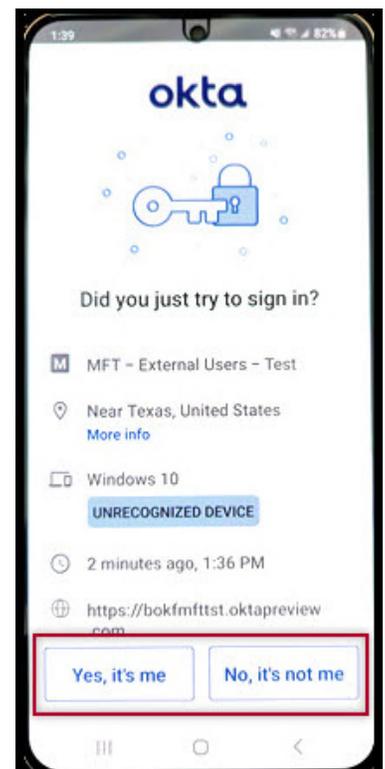


If “Okta Verify Push Notification” is selected, the below message will appear on screen and you will receive a message on your phone from Okta Verify confirming it is you.

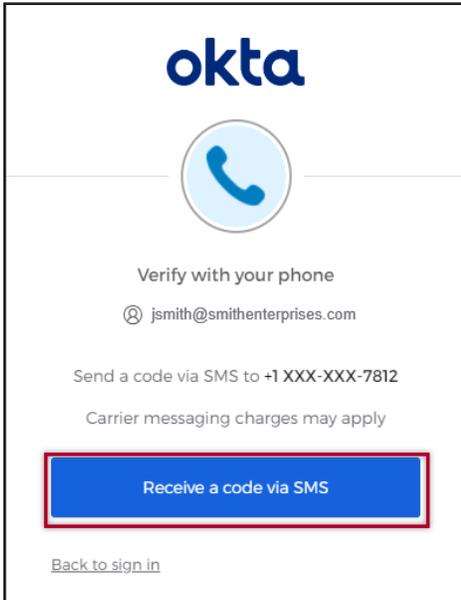


Select “Yes, it’s me” on your phone. **Note:** If you ever receive a push notification and you are not trying to sign in, select “No it’s not me”, change your MFT password immediately and contact the Bank.

Once you have authenticated, you are then directed to the MFT landing page.



Logging In - Phone (SMS Text) Authentication

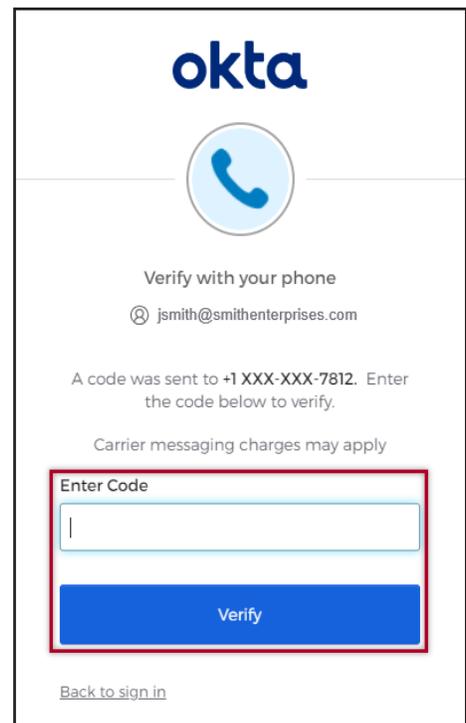


The phone “SMS” authentication prompt appears. Click the blue “Receive a code via SMS” button.

Key in the authentication code that you just received on your phone into the “Enter Code” field and click the blue “Verify” button.

You are then directed to the MFT landing page.

If you experience any issues while logging in, please consult the Technical Support section.



Technical Support

If you experience any issues or have questions about using the site, please reach out to your Client Services Professional. If your Client Services Professional is unavailable, please call 855-505-8600 to open a support case.

