

OKTA FREQUENTLY ASKED QUESTIONS



The purpose of this document is to provide a list of frequently asked questions (FAQs) related to Okta. This document covers general Okta FAQs as well as common Okta products such as Single Sign-On and Multi-Factor Authentication FAQs.

GENERAL OKTA BACKGROUND

What is Okta?

Okta is a security tool that will allow you to easily and securely log in to most websites and programs.

Who do I contact in case of issues with my Okta account?

Contact the Help Desk at BRPITIntegrations@baldwinriskpartners.com.

ACCESSING THE OKTA DASHBOARD

How do I set up my account?

You can set up your Okta account by following the user reference guide.

What is my username and password for Okta?

Your username is your email address and password will be sent in a separate email. If you did not receive a password, please contact BRPITIntegrations@baldwinriskpartners.com.

How do I sign into Okta once my account is created?

You can access Okta from this link: <https://baldwinriskpartners.okta.com/> or through the Okta Browser add-in.



NAVIGATING THE OKTA DASHBOARD

Do I have to use the Okta plugin?

It is highly recommended that you use the Okta plugin. It can help you get to your apps faster than through the web Dashboard, you can add your apps to Okta on the fly, and it comes with security benefits.

The plugin should be installed on your browser automatically. If it's not there, please reach out to BRPITIntegrations@baldwinriskpartners.com for assistance.

How do I add apps to my dashboard?

There will be an +Add Apps button on the left panel of your Okta Dashboard. Select that button, search for your app, and click the Add button.

Why does my Okta session expire, but some of the apps are still open?

When you're logged out of your Okta session, Okta won't automatically log you out of your applications. Your apps have their own session lifetime and won't be logged out. You can also manually log out of them when you're finished.

MANAGING PASSWORDS & ACCOUNTS

How do I unlock my account?

If you're locked out of your account (but still remember your password), click the "Need help signing in?" link at the bottom of the sign-in page. Click "Unlock Account" to unlock it. If that doesn't work, reach out to BRPITIntegrations@baldwinriskpartners.com.

What do I do if I forget my password?

If you've forgotten your password, click the "Need help signing in?" link at the bottom of the sign-in page. Then click "Forgot password" to reset it. If that doesn't work, reach out to BRPITIntegrations@baldwinriskpartners.com.

MULTI-FACTOR AUTHENTICATION (MFA)

What is MFA?

Multi-Factor Authentication (MFA) adds a second layer of security when logging into your account. It requires someone to have the username/password AND the user's mobile device in their hand to log in to their account. This drastically improves the security of our accounts.

Which MFA options are supported on Okta?

Right now, we allow the use of either the Google Authenticator app or Okta's own "Okta Verify" app. The Okta app is the preferred option as it allows push notifications to be used, which are usually easier than entering in a code.

What is Okta Verify?

Okta Verify is a mobile application from Okta that can be used to verify a user for MFA purposes. You receive a push notification on your mobile device to confirm the second factor after the factor is set up.

Do I need to set up MFA again if I registered previously?

No. Once done or configured, you need not set up a factor again.

Can I turn off MFA?

No, you cannot turn off MFA. MFA is required when on the BRP network and using BRP tools and resources.

What are the different ways I can access Okta-integrated applications?

There are two ways users can log in:

- You can go to baldwinriskpartners.okta.com and log in first, and then choose the application you want to access.
- You can go directly to the application you want to access using the application URL (the application may redirect you to the Okta login page depending on whether you have a valid session or not).

Can I register two devices for MFA?

No, with push notifications enabled, you cannot register two devices for a single account. You can, however, use the same device and apps for different accounts.

What do I do if I get a new cell phone?

To register a new device, you need to reset your MFA and then set it up again with the new device. If you are experiencing challenges with Okta and/or the authentication process, please reach out to BRPITIntegrations@baldwinriskpartners.com.

OKTA-SPECIFIC MFA PRODUCT HOW-TO & TROUBLESHOOTING

How do I set up and register my MFA?

You will be prompted to set up MFA upon logging into your account for the first time. You will be required to log in to Okta once daily.

How do I reset my MFA?

1. Go to your Okta Dashboard, where you'll be redirected to the Okta login page
2. Submit your username and password
3. If prompted, add your second factor for authentication
4. Once you're logged in, go to the Settings page, and click on Edit Profile
5. For security, you'll be prompted to provide your password and/or second factor
6. Click Remove for factor to reset
7. Click on Set up for factor you wish to reset

What can I do if I am stuck on the "Enrolling Your Device" screen on the phone I want to use for MFA?

If you get stuck in a loop when attempting to register via SMS/Email/QR code, or you are not getting any code to enter or any push notification, it means your device may not have enrolled correctly. In this case, you need to reset MFA from your account, uninstall Okta Verify on the device, install it again, and then set up the MFA again. If you still have any issues, reach out to BRPITIntegrations@baldwinriskpartners.com.

Why do I keep seeing MFA prompts after I've selected "Do not challenge me on this device again"?

If you continue to see MFA prompts after selecting "Do not challenge me on this device again," it could be for a few different reasons:

- 1. Cookie management:** The "Do not challenge me again" choice is captured in a browser cookie. If you've recently cleared your cookies or are using a new browser (like Chrome, Internet Explorer, Mozilla Firefox), it won't remember the choice.
- 2. Policy configuration:** Your Okta administrator sets how often they want MFA challenge prompts to appear. If they have set that window to every eight hours or 24 hours, you'll see MFA prompts again after that window, even if you've selected the "Do not challenge me on this device again" checkbox.
- 3. Exempted action:** Certain actions, like editing your account profile, will always trigger an MFA prompt as an additional layer of security.