

OKTA USER REFERENCE GUIDE



Please follow the steps below to guide you through your set up of Okta, BRP's new password management system. If you prefer to watch a video tutorial check it out: <https://www.youtube.com/watch?v=4yxlUgiPac> Setup must be completed to avoid interruption to your work.

STEPS FOR SETTING UP YOUR OKTA ACCOUNT

1. Proceed to <https://baldwinriskpartners.okta.com> and sign in using the credentials outlined below.
Username: *Your Current Work Email Address*
Password: *Your password will be outlined in the registration email.*

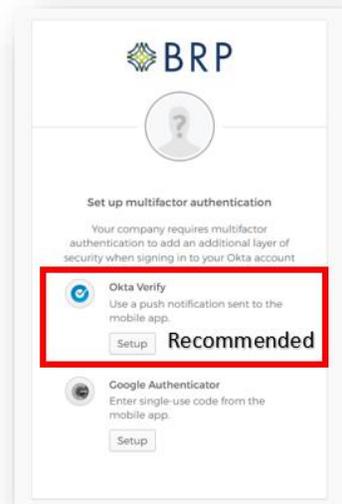
A screenshot of the BRP Okta sign-in page. At the top is the BRP logo. Below it is a circular profile picture placeholder with a question mark. A dark grey notification box states: "This is the first time you are connecting to baldwinriskpartners.okta.com from this browser". The sign-in form includes a "Username" field with the text "jmin-joe.holliday@baldwinriskpartners.co", a "Password" field with masked characters, a "Remember me" checkbox, and a blue "Sign In" button. A red rectangular box highlights the Username, Password, and Sign In button fields. At the bottom, there is a link for "Need help signing in?".

- Once you are signed in, you will be given a choice of MFA (multi-factor authentication) applications to register with. **You will need to download your application of choice from your phone's app store.**

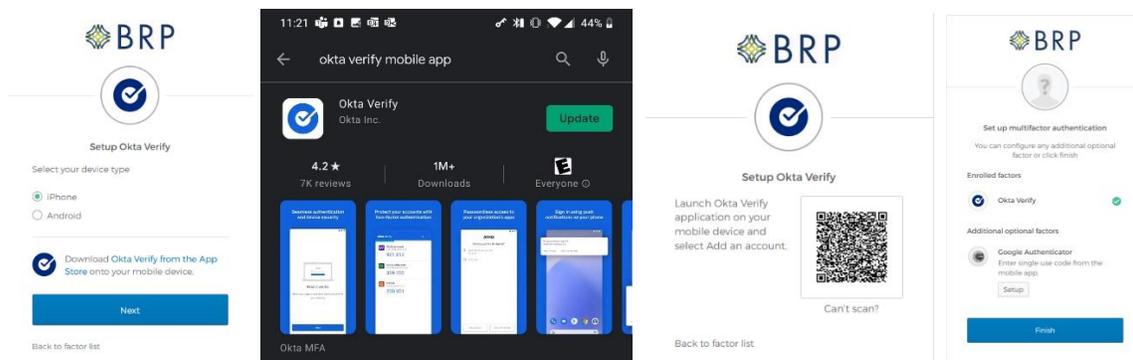
The **Okta MFA app (Okta Verify)** is the **recommended option** as it will allow you to receive push notifications for signing in and is the easiest method to use. You can also choose to use the Google Authenticator app.

Click the setup button below your choice and follow the prompts.

After you finish the MFA configuration, click Finish.

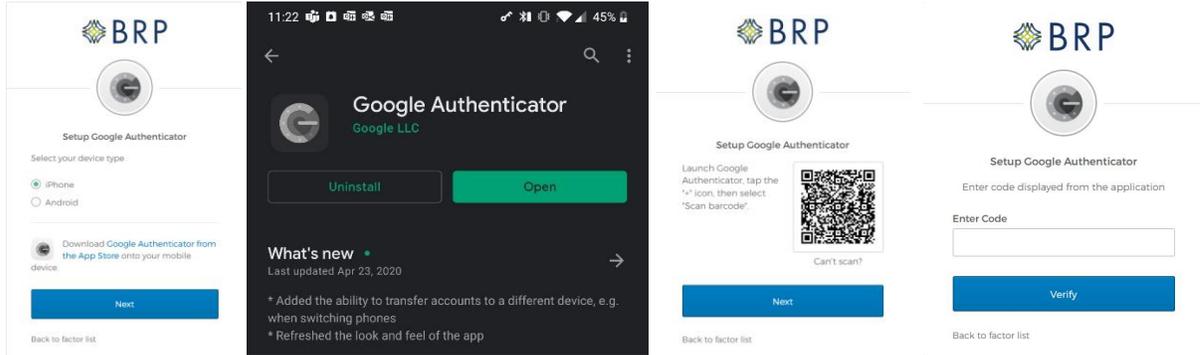


Steps for Okta Verify App



- Select your phone platform and download the Okta Verify Mobile App from your respective app store. Then hit next.
- Open the app on your phone and hit the “+” button in the top right corner. Choose “organization” for the account type.
- Your camera app should open. Point it at the QR code that shows up on your computer screen. Then hit “finish” on your mobile device and your computer.

Steps for Google Authenticator App



- Select your phone platform and download the Google Authenticator App from your respective app store. Then hit next.
- Open the app on your phone and hit the “+” button in the bottom right corner, then choose to “scan QR Code.” Your camera app should open. Point it at the QR code that shows up on your computer screen.
- After you scan the QR code, hit next on your computer. Then enter the randomly generated 6-digit number in the Google Authenticator app that shows up next to your Okta account. Finally, click “verify.”

3. After completing your set up on the mobile app, you will need to return to Okta page on your computer’s web browser and choose a security question and answer. You will also be asked to select a security image.

You should be prompted to select a security image. If you are not prompted to choose a security question or select a security image, please select “**edit profile**” to complete this step.

In the event that you forget your password, Okta will prompt you to answer your selected security question prior to resetting your password. The answer to your security question must be at least 4 characters in length.

The security image will be shown every time you login to Okta so that you know you are logging into BRP’s actual Okta tenant, and not a phishing or imposture page.

Never enter your credentials on the Okta sign-in page if you do not see your personalized security image.

Once you have completed the steps of the security question/ image set up, click the “**Create My Account**” button and you are all set and ready to use Okta!

Welcome to Baldwin Risk Partners, Admin-Joe!
Create your Baldwin Risk Partners account

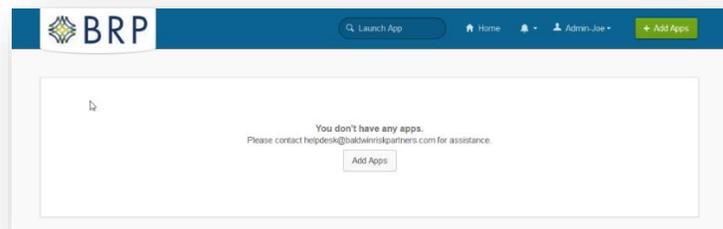
fb Choose a forgot password question
What is the food you least liked as a child?
Answer
Green eggs and ham

img Click a picture to choose a security image
Your security image gives you additional assurance that you are logging into Okta, and not a fraudulent website.

Create My Account

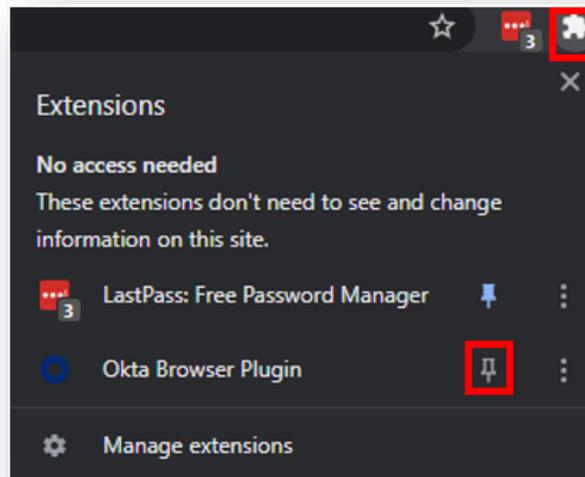
You will see a screen like the image below, indicating that you have completed your set up.



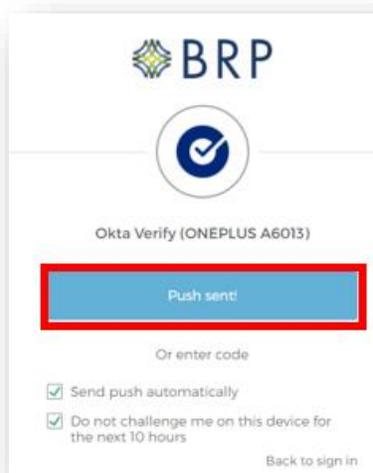
SIGNING IN AFTER YOU CREATE YOUR OKTA ACCOUNT

1. Once your Okta account has been setup, you will sign-in either by going directly to our Okta site (<https://baldwinriskpartners.okta.com/>) or by using the Okta add-in in your web browser.

If you do not see the add-in, you may need to click the puzzle icon in the top right of your web browser, and then click the pin icon next to the Okta add-in.

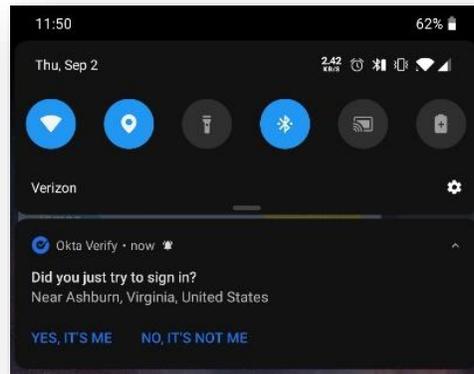


2. When prompted for an username/email and password, you will use your existing Microsoft credentials. (Note: these are the same credentials to login to your BRP computer and BRP email account).
3. After signing in, you will likely be asked to use your second form of authentication. If you chose to setup the recommended Okta app, click the button to push the request.



You should receive a “push notification” on your smart phone where you can tap “approve” within the application.

If you chose to use the Google authenticator app, open the app on your smartphone. Then locate the Okta account and enter the numbers you see next to it on the Okta sign-in page of your computer.

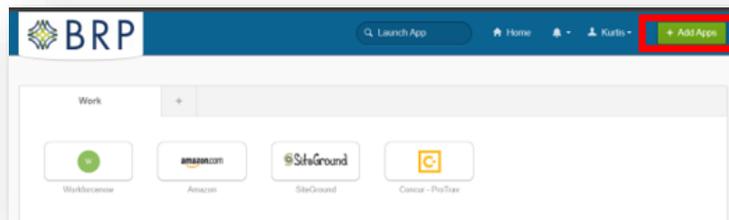


HOW TO ADD NEW WEBSITES

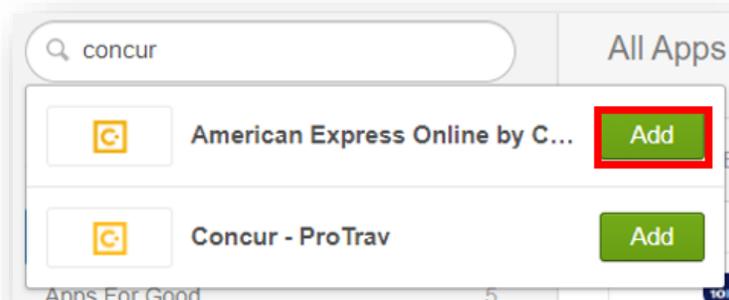
1. To save new sites, simply navigate to the site that you wish to add. Then login as normal. You should receive a prompt in the top right corner of your browser asking if you want to save the password to Okta.



2. If you do not receive the prompt as show above, then you can add the website by going to the Okta Dashboard (<https://baldwinriskpartners.okta.com/>) and clicking on the “add apps” button in the top right corner.

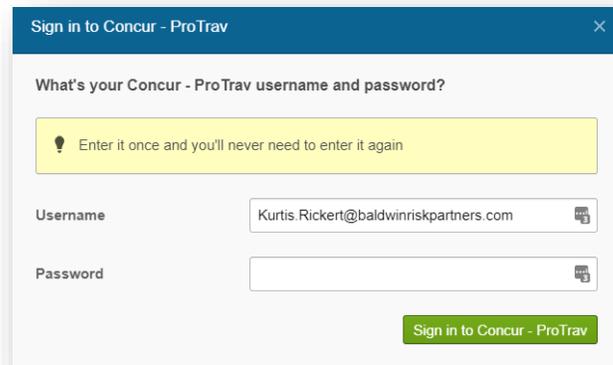


3. If manually adding the website, you will need to search for the app you want to add and click the “add” button.



4. You will then be prompted to save your username and password.

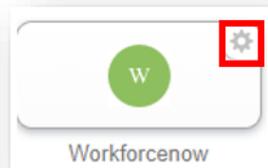
Note: Some sites are added to your account automatically by BRP. You may have limited permissions to view or edit the credentials for these sites.

A screenshot of a web browser window titled "Sign in to Concur - ProTrav". The window contains a login form with the heading "What's your Concur - ProTrav username and password?". Below the heading is a yellow box with a lightbulb icon and the text "Enter it once and you'll never need to enter it again". The form has two input fields: "Username" with the value "Kurtis.Rickert@baldwinriskpartners.com" and "Password" which is empty. A green "Sign in to Concur - ProTrav" button is located at the bottom right of the form.

HOW TO MANAGE YOUR WEBSITES

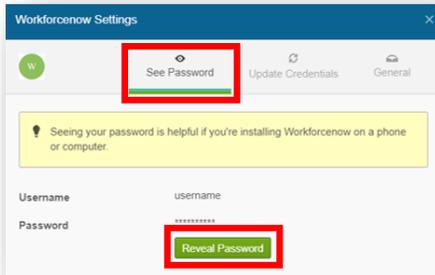
1. To manage your sites, start by navigating to the Okta dashboard (<https://baldwinriskpartners.okta.com/>).

Then, hover your mouse over the site you want to manage and click the gear icon in the top right corner.

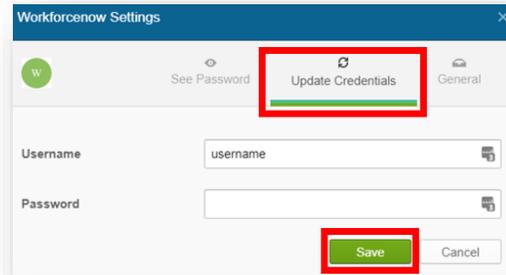


2. A menu will open and from here, you can click “Reveal Password” to see the password (if allowed). You may wish to do this in the event that you need to verify your password or copy and paste it for use somewhere else.

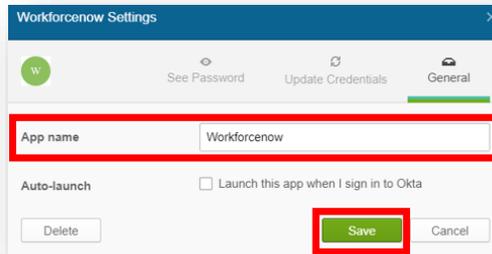
You can update the credentials if they have changed. You can also change the name of the icon to differentiate it if you have multiple passwords for the same site.



Reveal (See) Password



Update Your Credentials



Change the Name of the Icon