



**INFORMATION TECHNOLOGY**

# **OKTA USER GUIDE**

**V2.0**

The purpose of this guide is to assist users with the initial set up and familiarization of the Okta Single Sign-On (SSO) Solution. The following will provide an overview of Okta and walk users through the initial setup from receipt of the “Welcome to Okta” email to setting up Multi-Factor Authentication (MFA) factors.

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## 1. What is Okta and how will it be used?

Simply, **Okta** will have TWO functions:

### 1. Single-Sign On (SSO) Service

It will be a one-stop shop login portal service that only requires you to remember one password instead of numerous for your different applications. Once configured by the Hayward IT Dept, Okta will interact with the various applications required for your duties by allowing you to only sign into the Okta web portal and giving you access to all your work-related applications (Google, Dayforce, Salesforce, FortiClient VPN, etc) without having to input a password for those apps.

### 2. Multi-Factor Authentication (MFA)

It gives you the security of requiring your password from SSO above AND something you have (your phone) to confirm it is in fact your trying to sign in EVERY TIME you attempt to sign in. If someone has your password, but not your multi-factor authenticator, they cannot login to your account.

## 2. SETTING UP YOUR OKTA ACCOUNT

Setting up your Okta account will be done in two steps CONCURRENTLY and both parts are required to move forward:

Step 2a: Logging into your account on your **computer**.

Step 2b: Setting up your MFA on your **phone**.

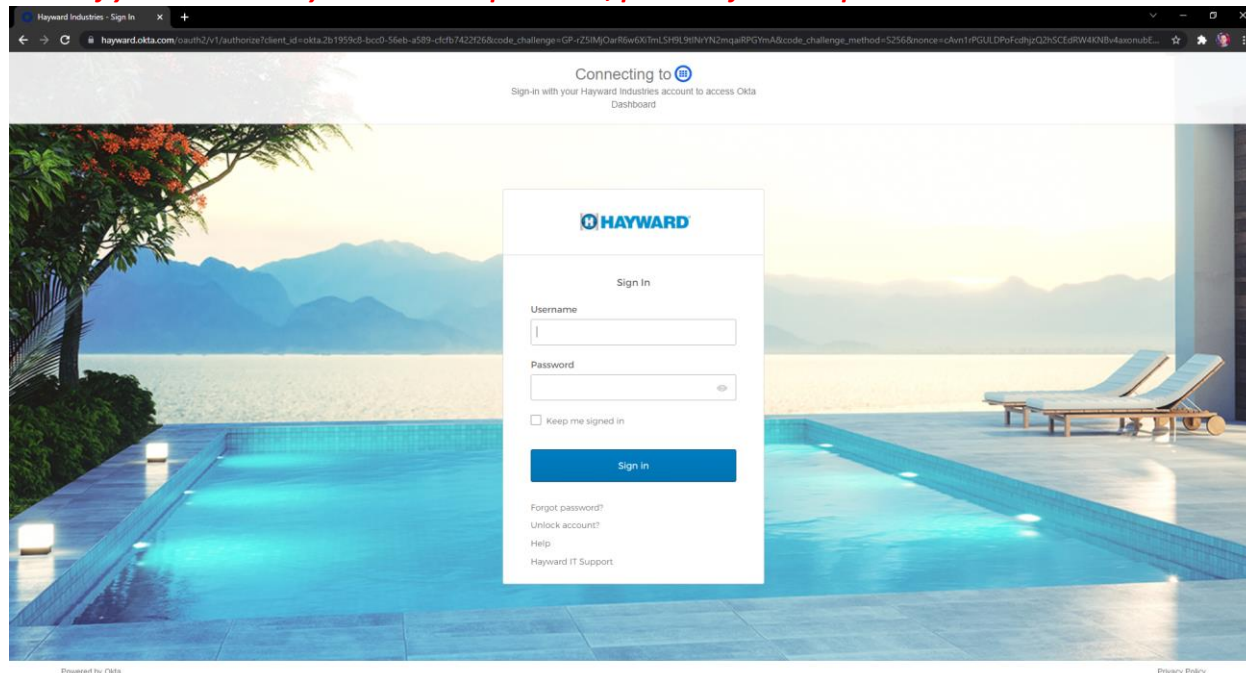
### 2a. Logging into Okta (ON COMPUTER).

To active/login to your Okta account, go to <https://hayward.okta.com/>

Input your “**@hayward.com**” email address in the Username field.

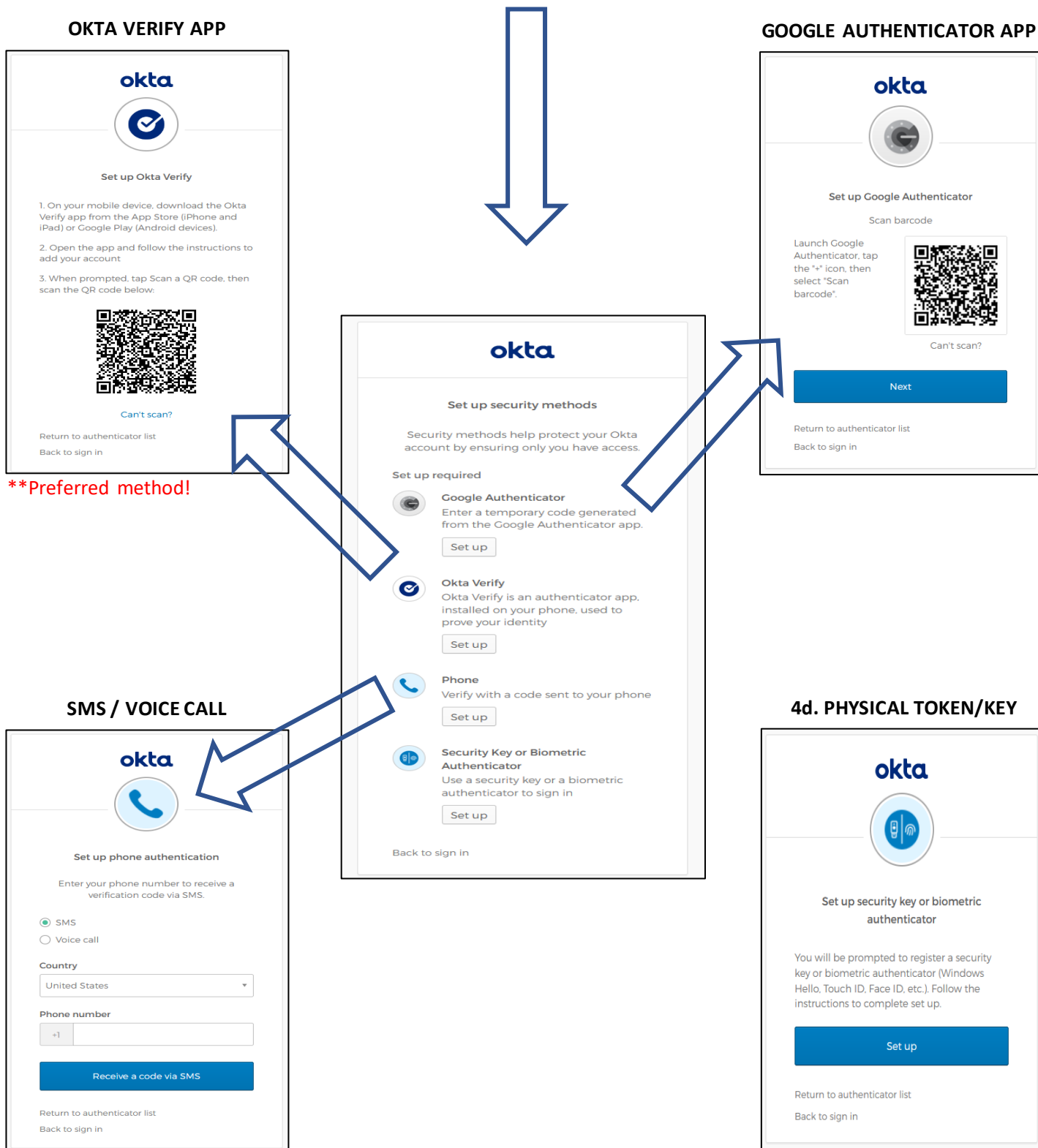
Input your **Windows password** (password used to login to your computer, KACE ticketing system, or FortiClient VPN) in the Password field.

**\*\*\*\*\* If you don't know your Windows password, please refer to Step 6a.**



\*\*\*\* If you receive an error, please refer to Section 6.

The next screen you will see is “Set Up Security Method” (the middle picture), where you will choose your MFA methods from the options available; the minimum is one method. When you click a Set-Up button, it will take you to the respective screens shown. Please go to Step 2b.



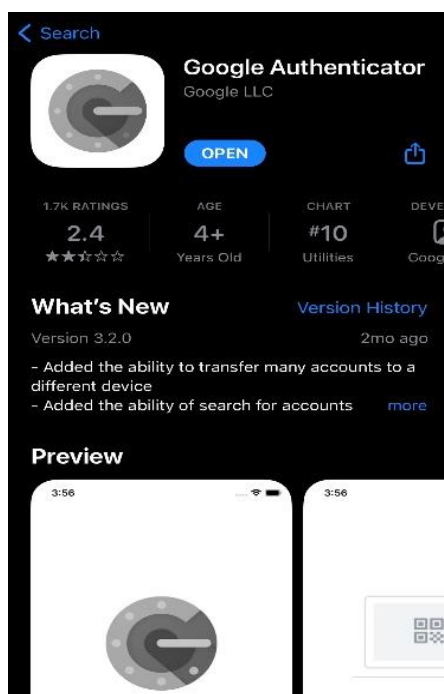
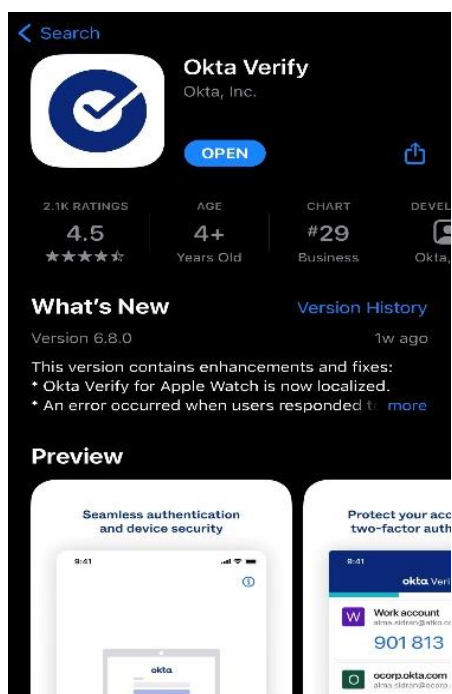
\*\*\*To be determined

## 2b. Setting up MFA (ON PHONE)

The next steps will take place on your phone. If you opt to use the Okta Verify or Google Authenticator mobile app, they are both available (free) on the Apple App Store and Google Play Store (see below for examples).

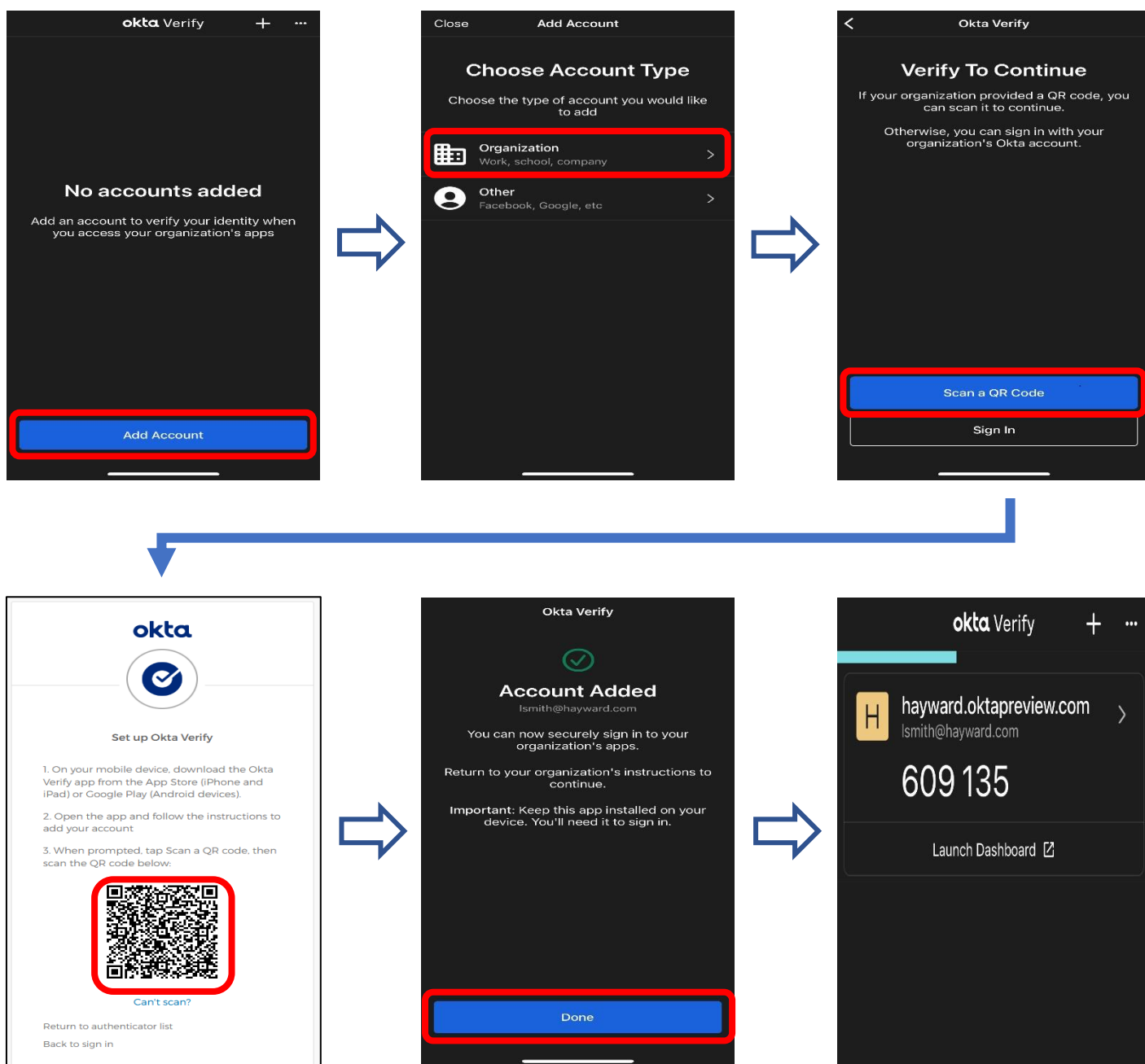
If you do not wish to use either app, please skip to Step 2b. (3).

*\*\*\*\*\*Neither of these apps collects personal data from your phone. They will only collect necessary data to improve functionality of the app, similar to every other app. If you have further questions or concerns about the app, please see the info provided by the vendor in the app store.*



## 2b (1). Okta Verify App

- i. Navigate to the respective application store for your device (Apple App Store used as example).
- ii. Search for and install the Okta Verify app.
- iii. Once installed, open the app, select the blue **"Add Account"** button.
- iv. Select **"Organization"** then **"Scan a QR Code"**.
- v. When your camera on your smart phone opens, scan the QR code provided on your computer during account set up.
- vi. Select **"Done"**. Your Okta Verify app is now setup as a second factor of authentication for login.



## 2b (2). Google Authenticator App

- i. Navigate to the respective application store for your device (Apple App Store used as example).
- ii. Search for and install the Google Authenticator app.
- iii. Once installed, open the app, select the **"Get Started"** button at the bottom.
- iv. Select **"Scan a QR code"**.
- v. When your camera on your smart phone opens, scan the QR code provided on your computer during account set up.
- vi. Click **"Next"** on your computer and input the 6-digit code provided by your Google Authenticator app. This will log you into Okta. Your Google Authenticator app is now setup as a second factor of authentication for login.



**2b (3). SMS / Voice Call**

- i. Select **"SMS"** if you want to receive a text or **"Voice call"** if you want to receive an automated call.
- ii. Input your personal or Hayward provided mobile phone number (no spaces or dashes) and click **"Receive a code via SMS"**.
- iii. The Okta page will ask for a numeric code. If you requested a SMS text, you will receive a 6-digit code. If you requested a voice call, you will receive a 5-digit code. Input that code and click **"Verify"**.
- iv. Your phone is now setup as a second factor of authentication.

The image displays two sequential screenshots of the Okta mobile authentication setup interface, connected by a blue arrow pointing from left to right.

**Left Screenshot: Set up phone authentication**

- Header: okta logo and a blue phone icon.
- Title: Set up phone authentication
- Text: Enter your phone number to receive a verification code via SMS.
- Options: ☒ SMS and ☐ Voice call.
- Country: A dropdown menu showing "United States".
- Phone number: A text input field with a "+1" country code prefix. The input field and the "Receive a code via SMS" button below it are highlighted with a red rectangle.
- Buttons: "Receive a code via SMS" (blue button).
- Footer: "Return to authenticator list" and "Back to sign in" (small text).

**Right Screenshot: Set up phone authentication**

- Header: okta logo and a blue phone icon.
- Title: Set up phone authentication
- Text: A code was sent to your phone. Enter the code below to verify. Carrier messaging charges may apply.
- Input: "Enter Code" label above a text input field. The input field and the "Verify" button below it are highlighted with a red rectangle.
- Buttons: "Verify" (blue button).

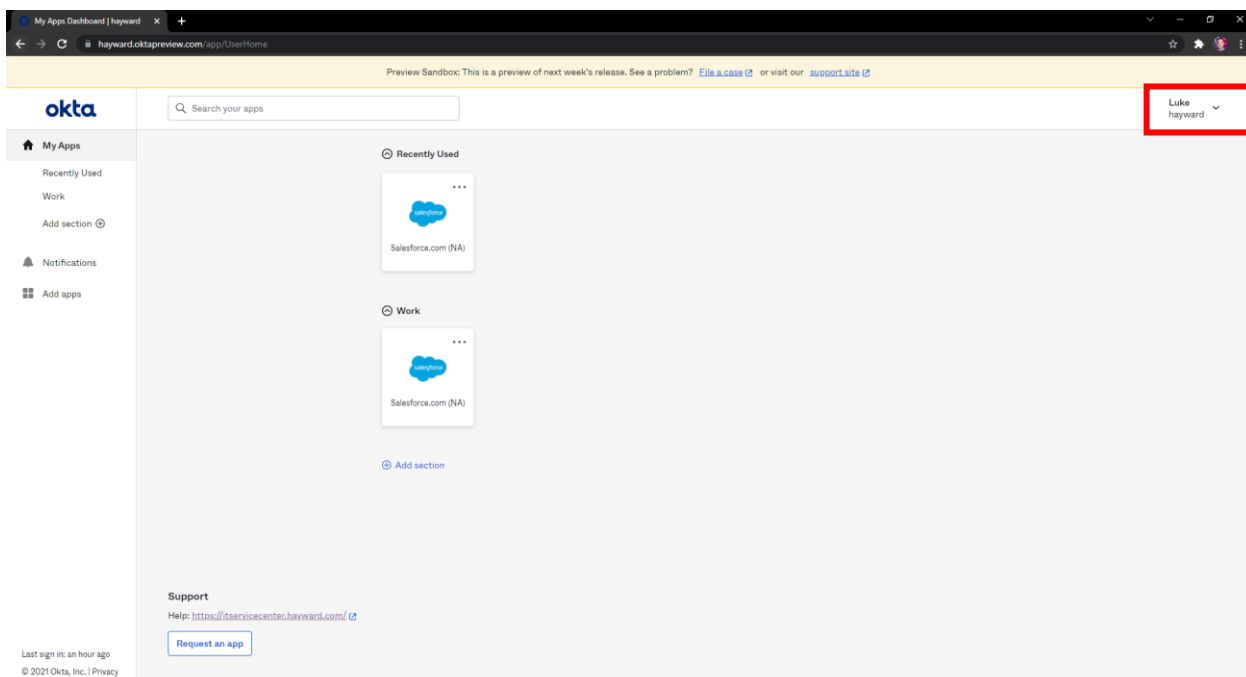
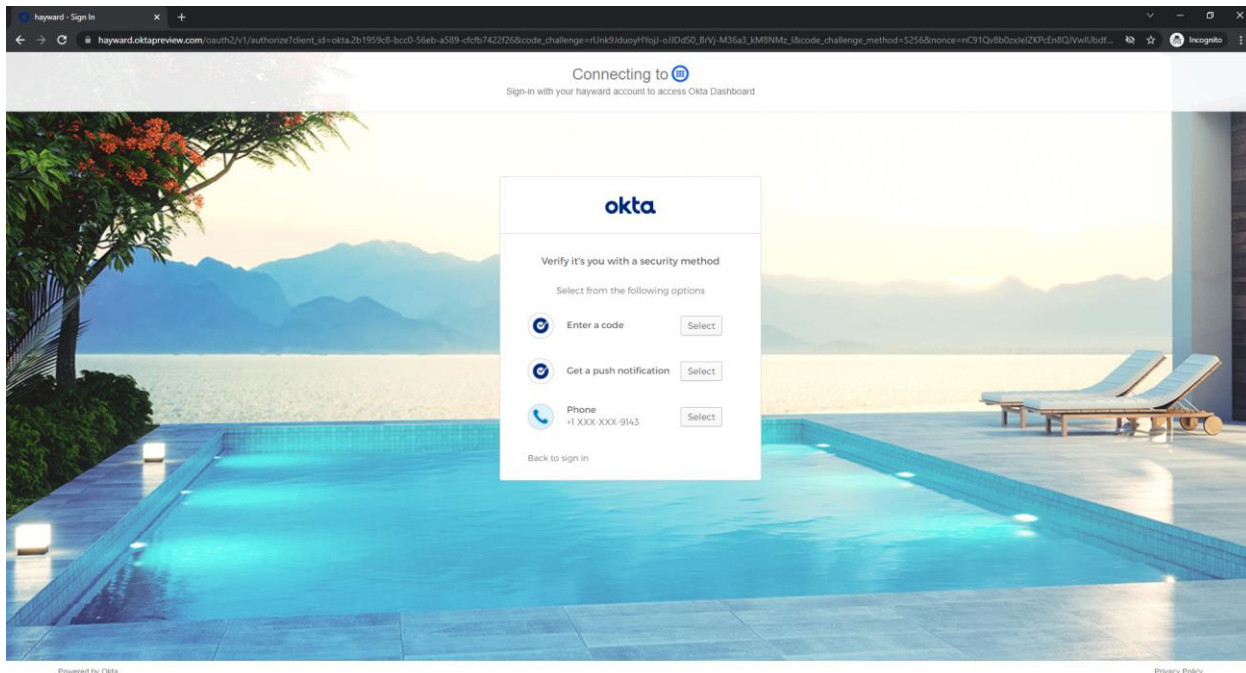
At this point, you should have set up at least one MFA method and will be able to log into Okta. Please go to Step 3.



### 3. LOGGING INTO OKTA

Once you've completed the MFA setup, you will see the below page. Earlier you already used your password (first factor) to start the login process, now you will need to use the method you set up (second factor) to complete the login process. Once you confirm the MFA method, you will be taken to the Okta Dashboard.

EVERYTIME you login to Okta, you will input your “@hayward.com” email address, **Windows password**, and will receive the below prompt.



#### **4. OKTA SETTINGS**

Clicking on your name with the down arrow in the top right corner will give you the “Settings”, “Preferences”, and “Sign out” options.

In “Settings”, you can remove, change, or add a new MFA method.

#### **5. ACCESSING APPLICATIONS**

**5a. FortiClient VPN**

**5b. Google Workspace**

**5c. Salesforce**

**5d. Dayforce**

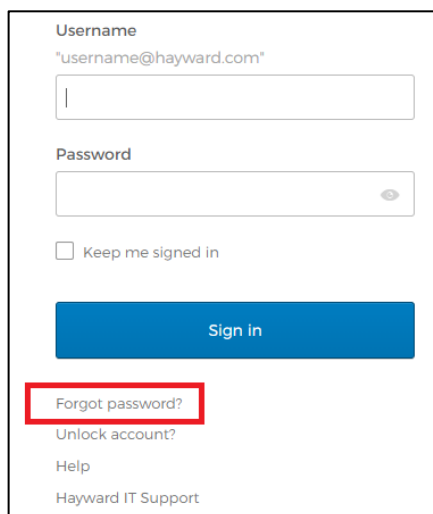
**5e. Concur**

## 6. ISSUES & ERRORS

### 6a. Forgot Password

If you are unable to get into Okta using your Window's password, then select "Forgot password?" and follow the instructions to reset.

**IMPORTANT NOTE: Changing your password in Okta will change your KACE ticketing, FortiClient VPN, and possibly your Window's password. You can ONLY do this every TWO DAYS!**



Username  
"username@hayward.com"

Password

☐ Keep me signed in

Sign in

Forgot password?

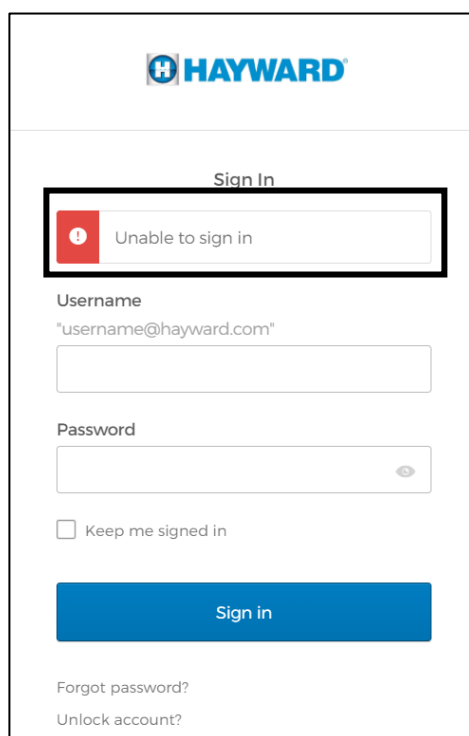
Unlock account?

Help

Hayward IT Support


### 6b. Unable to Sign In

If you receive a "Unable to sign in" error, please reset your password using Step 6a.



HAYWARD

Sign In

 Unable to sign in

Username  
"username@hayward.com"

Password

☐ Keep me signed in

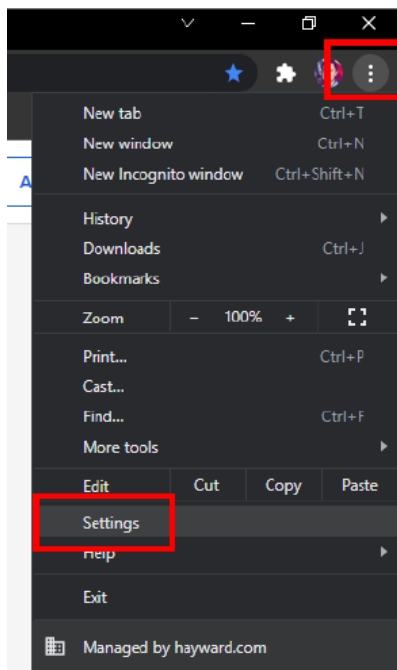
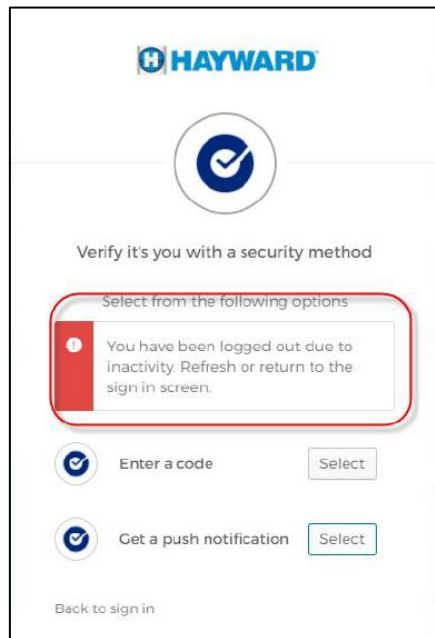
Sign in

Forgot password?

Unlock account?

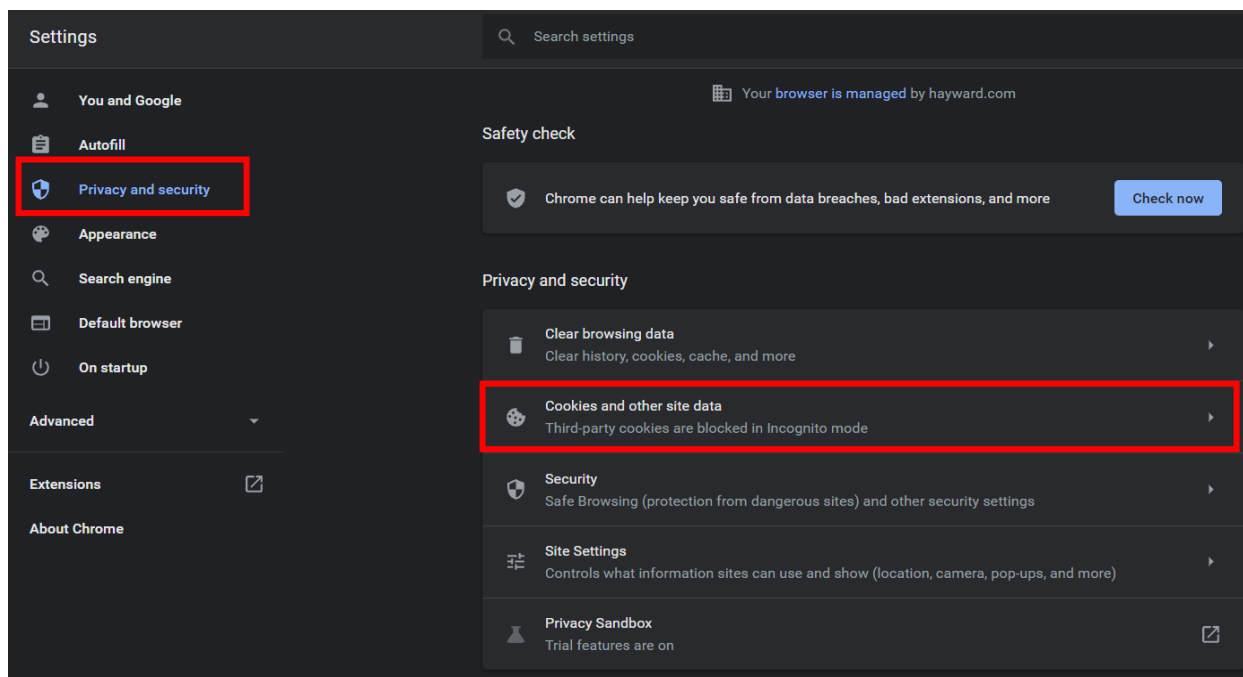
### 6c. Can't Confirm with MFA

If you receive the following error when trying to confirm with your MFA, you may need to delete your browser's cache/cookies. Follow the below steps to not delete more than what is necessary.

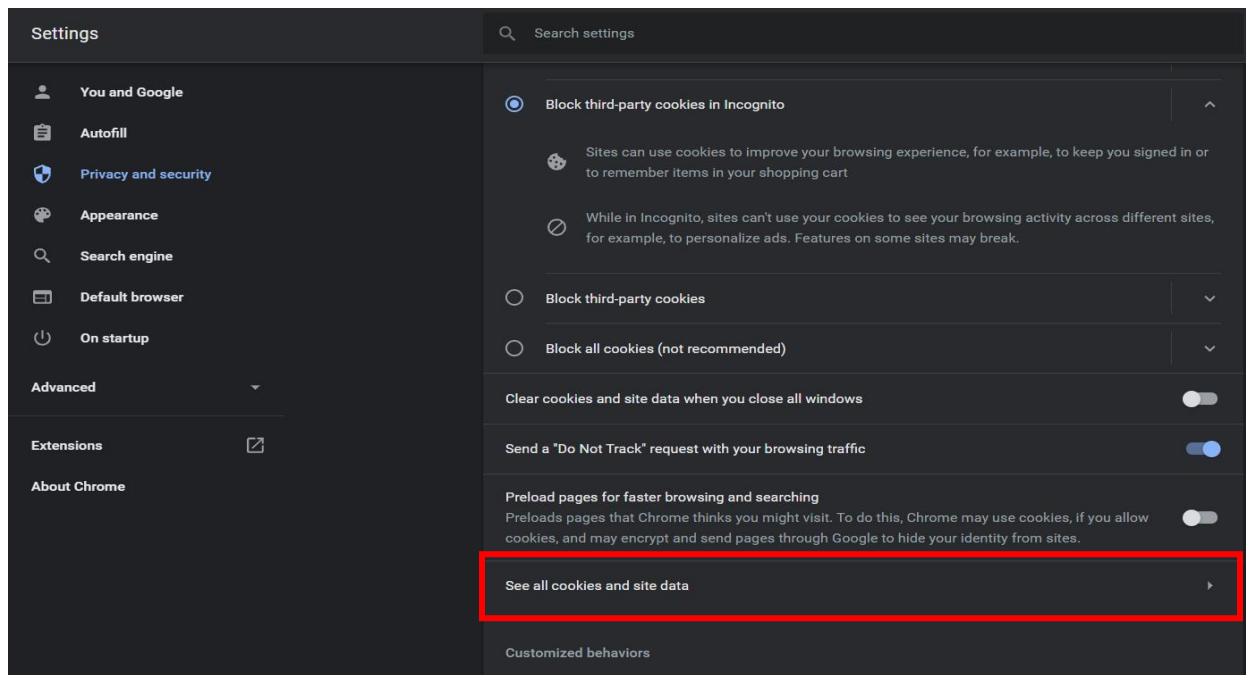


From the Chrome browser, click the three dots/ellipses in the top-right corner, then click Settings.

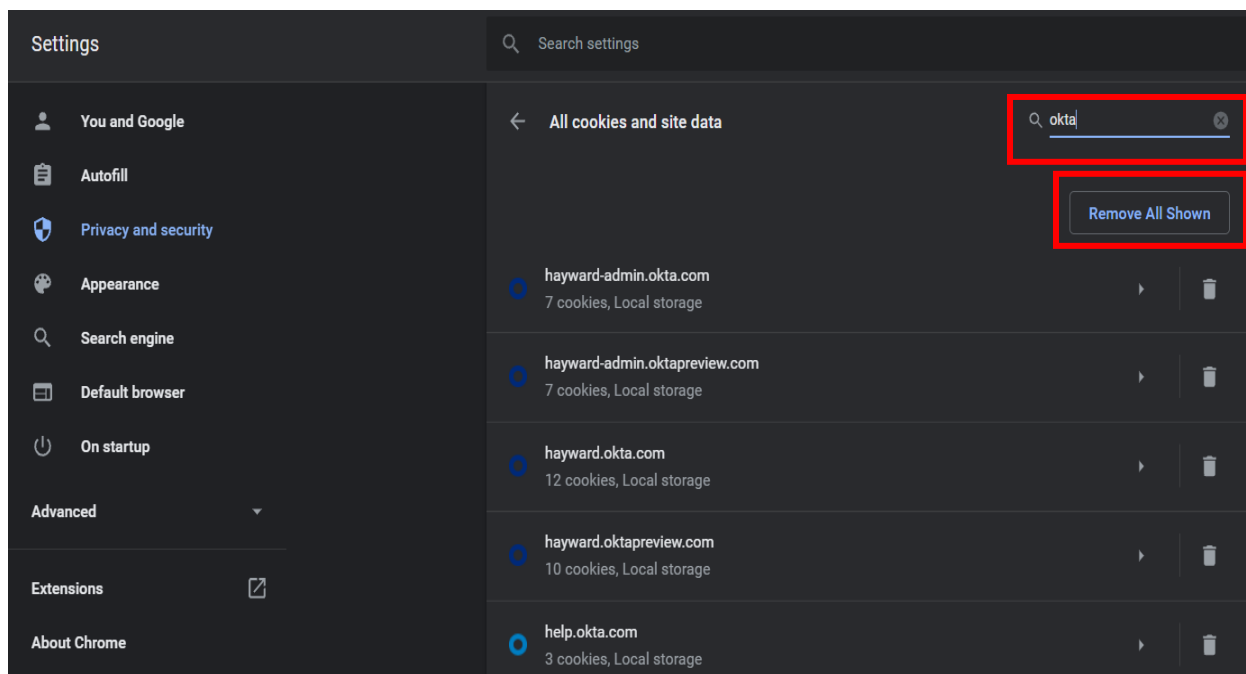
Click "Privacy and security" then click "Cookies and other site data".



Click “See all cookies and site data”.



Type “Okta” in the top-right search bar, then click “Remove All Shown”.



Try to login again. If the problem persists, Hayward IT Security.