

Getting Started with Collaborate

You will receive an email similar to the below, advising that there is a document to view in your Collaborate Portal.

Hello George

Nexia Edwards Marshall is sharing the following document with you:

- [DAF - Registration TEST Signing FYI-1002534565.pdf \(SIGNED\) \(FYI-1002554216\).pdf](#)

If you require assistance to view or sign this document, please contact me.

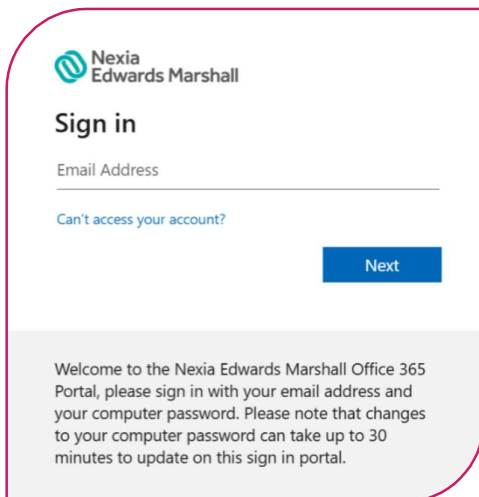
Please note that security has recently been increased on our Collaborate site, requiring two-factor authentication to be set up for all users. Please follow the prompts when logging in to Collaborate to set up 2FA via text message (recommended) or the Microsoft Authenticator app.

If you do not have a microsoft account, please create one here to receive and sign documents in future:

<https://signup.live.com/?lic=1>

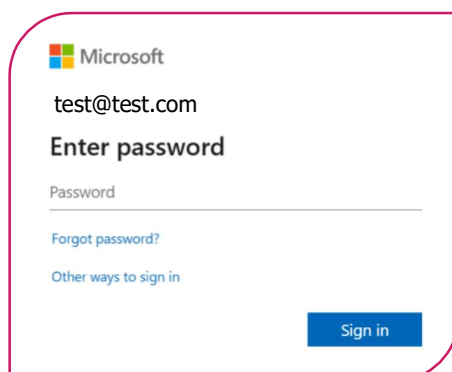
Kind regards,

You will go to the Collaborate Portal login page and add the email address you have registered with Nexia Edwards Marshall, click 'Next'.



The image shows a sign-in page for Nexia Edwards Marshall. At the top left is the company logo. Below it is the heading "Sign in". There is a text input field labeled "Email Address". Below the field is a link that says "Can't access your account?". To the right of the field is a blue button labeled "Next". At the bottom of the page, there is a grey box containing a welcome message: "Welcome to the Nexia Edwards Marshall Office 365 Portal, please sign in with your email address and your computer password. Please note that changes to your computer password can take up to 30 minutes to update on this sign in portal."


You will then be taken to the Microsoft login page as shown below.



The image shows a Microsoft sign-in page. At the top left is the Microsoft logo. Below it is the email address "test@test.com". The heading "Enter password" is displayed. There is a text input field labeled "Password". Below the field are two links: "Forgot password?" and "Other ways to sign in". At the bottom right is a blue button labeled "Sign in".

If you have a Microsoft account, please enter the password associated with that account that is connected to the email address you entered to login. Click 'Sign In'.

You should be taken to the following to confirm if you want to stay signed in, please make selections accordingly.

 **Microsoft**

test@test.com

Stay signed in?


Stay signed in so you don't have to sign in again next time.

☐ Don't show this again

No


Yes

You will then be taken to the Permissions requested page, please click 'Accept'.

 **Nexia
Edwards Marshall**

test@test.com

Permissions requested by:

 **Nexia Edwards Marshall**
edwardsmarshall.onmicrosoft.com

By accepting, you allow this organization to:

✓ Receive your profile data

✓ Collect and log your activity

✓ Use your profile data and activity data

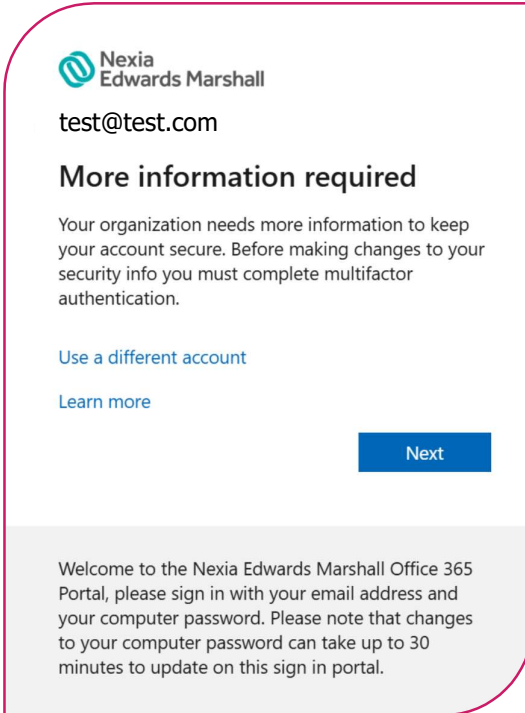
You should only accept if you trust Nexia Edwards Marshall. [Read Nexia Edwards Marshall's privacy statement](#). You can update these permissions at <https://myaccount.microsoft.com/organizations>. [Learn more](#)

This resource is not shared by Microsoft.

Cancel

Accept

There will be a 'More information required' page, please click 'use a different account' or click 'Next', as shown below.



The screenshot shows a login page for Nexia Edwards Marshall. At the top left is the logo and name. Below it is the email address 'test@test.com'. The main heading is 'More information required'. The text below explains that more information is needed for account security and mentions multifactor authentication. There are two links: 'Use a different account' and 'Learn more'. A blue 'Next' button is at the bottom right. At the bottom of the page, there is a welcome message for the Office 365 Portal.

Nexia
Edwards Marshall

test@test.com

More information required

Your organization needs more information to keep your account secure. Before making changes to your security info you must complete multifactor authentication.

[Use a different account](#)

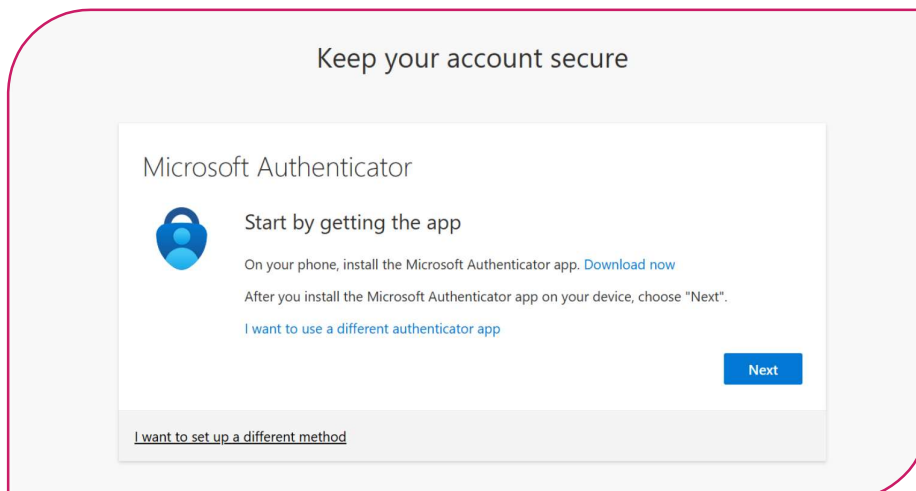
[Learn more](#)

Next

Welcome to the Nexia Edwards Marshall Office 365 Portal, please sign in with your email address and your computer password. Please note that changes to your computer password can take up to 30 minutes to update on this sign in portal.

You will now need to download the Microsoft Authenticator app onto your mobile phone via the App store for your relevant device.

You will need to click on [Download now](#) if you don't have it or click Next if you already have the app. If you wish to use an alternative app please click on [I want to use a different authenticator app](#). You can use a different method by clicking on the [I want to set up a different method](#).



The screenshot shows a page titled 'Keep your account secure'. It features a box for 'Microsoft Authenticator' with instructions to download the app. There are links for 'Download now', 'I want to use a different authenticator app', and 'I want to set up a different method'. A blue 'Next' button is at the bottom right of the box.

Keep your account secure

Microsoft Authenticator

Start by getting the app

On your phone, install the Microsoft Authenticator app. [Download now](#)

After you install the Microsoft Authenticator app on your device, choose "Next".

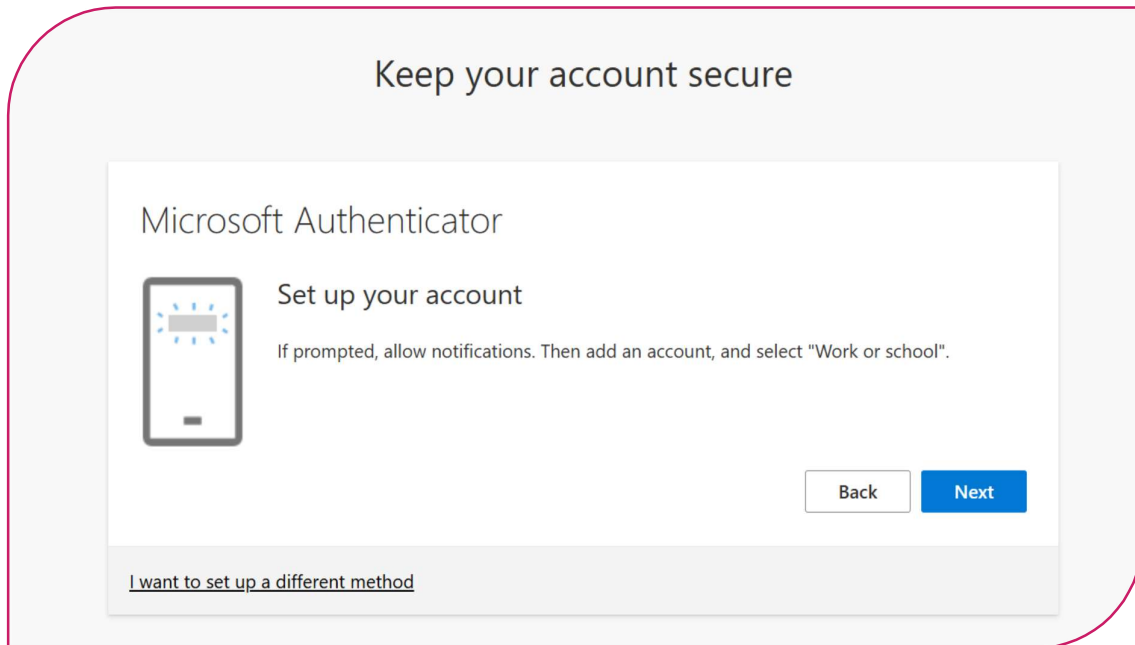
[I want to use a different authenticator app](#)

Next

[I want to set up a different method](#)

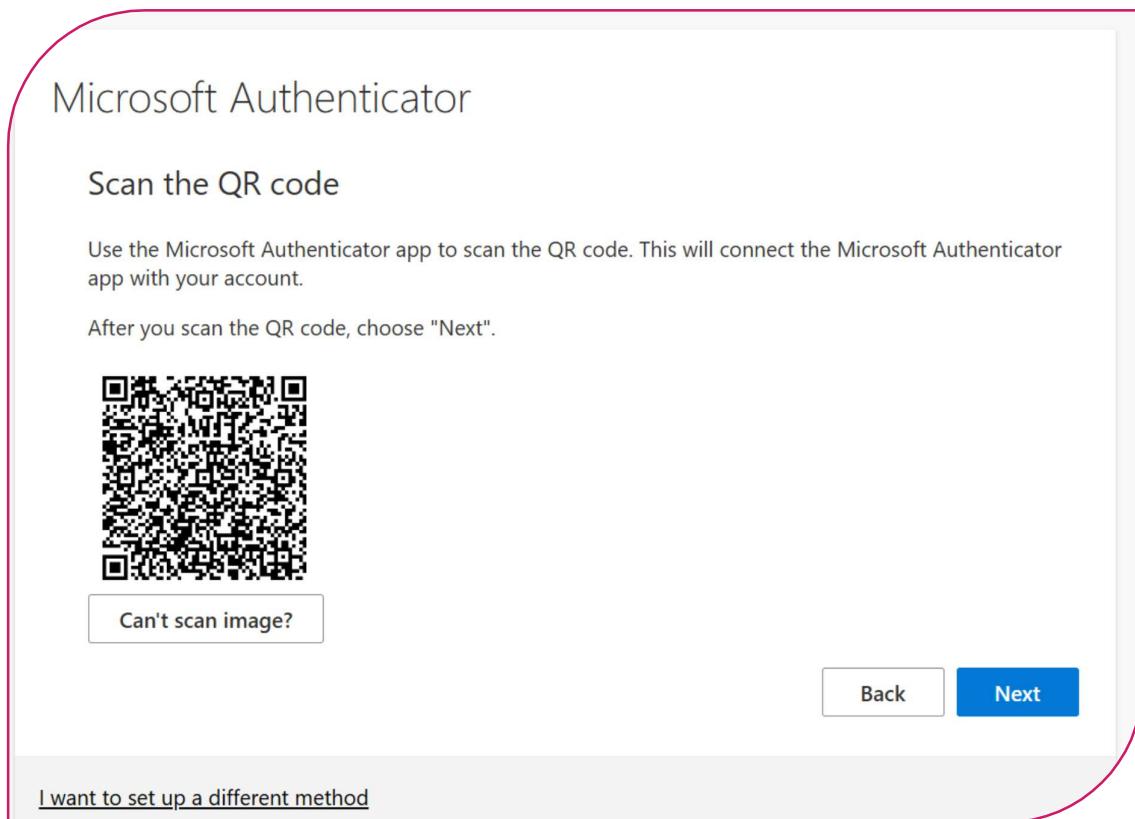
Once you have downloaded the app from the relevant App Store or already have the app please click 'Next'.

You will then need to Set up your account.



Click Next or I want to set up a different method.

Once you click 'Next' you will get the Microsoft Authenticator 'Scan QR Code', as shown below.



Open the Microsoft Authenticator App and click the plus sign at the top of your device screen. Select the 'Personal' / 'Work' or 'School' account.

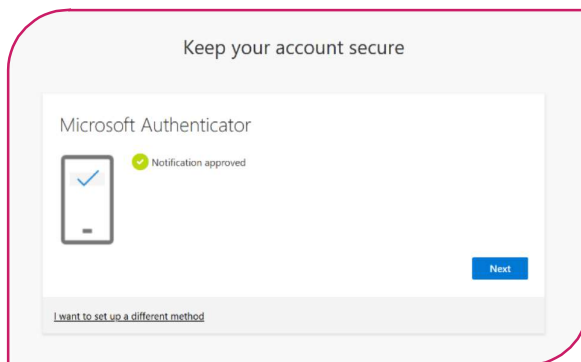
Select Scan a QR Code.

Then scan the QR code on your PC with your mobile device.

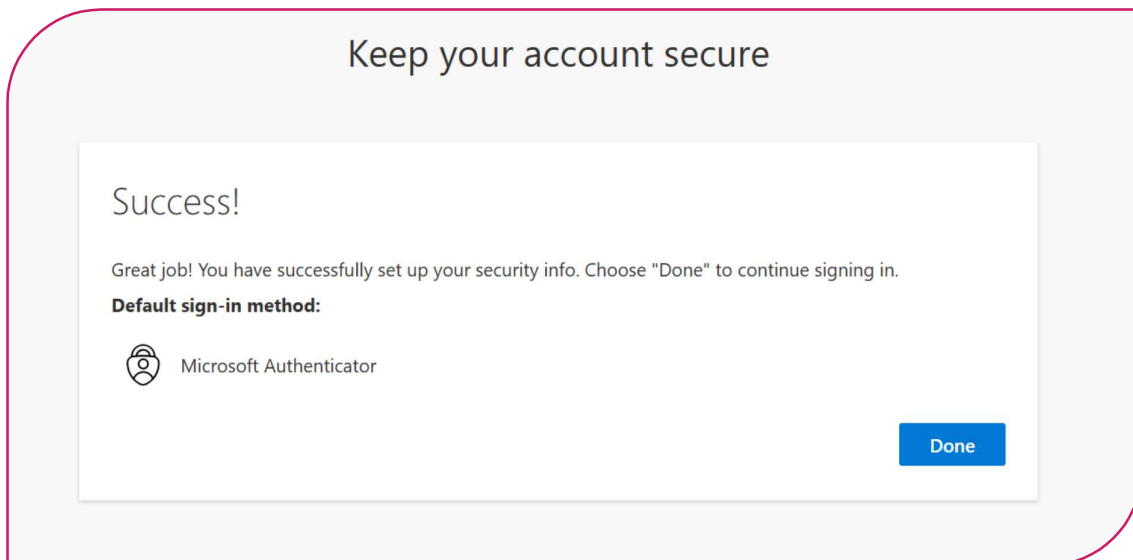
This will then add the account Nexia Edwards Marshall

Click 'Next' on your PC.

You will be asked to place a code on your mobile device from your computer screen and enter this if successful you should receive the below message then click 'Next'.

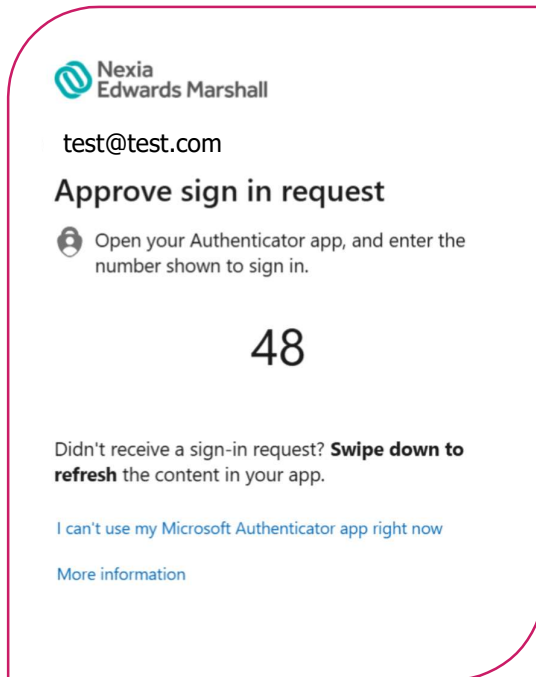


You should then receive the following message:



Click 'Done'.

You will then need to Approve sign in request. Open your Authenticator app and enter the number shown on your PC.



You will only need to do this setup once and then you should be able to access the Collaborate portal by using the Authenticator App for your 2FA (Two Factor Authentication).

If you need further assistance, please reach out to your client services coordinator.