

Crowe Secure Information Exchange (Crowe Exchange) uses Multi-Factor Authentication (MFA) to ensure your data is secure. The first time you log in to Crowe Exchange, it will require steps to set up your MFA.

On subsequent visits to Exchange, you'll have several options in which you can use MFA to login to Exchange

This job aid covers:

- First Time Login to Crowe Exchange
- Subsequent Login to Crowe Exchange
- Accessing Okta Admin site

#### First Time Login to Crowe Exchange

1. You will receive an email [apps-noreply@iam.crowe.com] from Okta. Click on the Activate Account button in the email.

Note: Okta provides the MFA service for you to securely use Crowe Exchange.



2. If the Crowe Email Redirect Page appears, click the Launch button in the Crowe Secure Information Exchange section.

#### Welcome!

Firmwide



3. The Welcome to Crowe LLP screen will appear. Type a new password in the Enter new password field. Then reenter it in the Repeat new password field.

	Create your Crowe LLP account
D	Enter new password
	Password requirements: at least 8 characters, a lowercase letter, an uppercase letter, a number, a symbol, no parts of your username. Your password cannot be any of your last 24 passwords. At least 1 day(s) must

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4. You will be asked to choose a security question. Type your response in the **Answer** field.

What is the food you least liked as a child?	~
Answer .	

5. Click a picture to select your security image and then click **Create My Account**.

	***	
		and the
. See		
		-

6. A Verify with Email Authentication box will appear. Click Send me the code to have the code sent to your email.

	A Crowe
	Verify with Email Authentication
Se	nd a verification code to bg@aol.com.
Γ	Send me the code

7. Once you receive the code, type it in the **Verification code** field and click **Verify**.

	Crowe	
A verific Check 3	Verify with Email Authentication ation code was sent to T_a@ our email and enter the code below.	
A	Haven't received an email? Send again	
	Venty	

secondary MFA setting.



**Optional Multi-Factor Authentication Set-Up** You can choose to include your mobile number or an email as a

8. You will receive a prompt to set up a mobile phone number or, email address, Google Authenticator, or Okta Verify as a second level of security. Click on your choice of secondary MFA and then Click **Configure next factor**.



9. If you chose SMS Authentication, you'll be asked to enter your mobile phone number. If you choose Email authentication, enter your email address and click **Send Code**.

10. Once you receive the code on your mobile phone or through email, type the code in the **Enter Code** field and click **Verify**.

Receive a code via SMS to authenticate	Crowe
United States	Set up Email Authentication A verification code was sent to p_S@gmail.com. Check your email and enter the code below.
Enter Code	Verification code
Verify	Verify



11. You will receive a screen confirming that your MFA is set up. Click **Finish** and Crowe Exchange will open.



12. The **Crowe Universal Subscription Agreement** will open the first time Exchange opens. Read it and click **I Accept** to proceed.

Crowe Unive	ersal Subscription Agreement	Crowe Secure Information Exchange
Please take a mom	ent to review the Terms of Service agreement below. By clicking "I Accept", you indicate your a	cceptance of all the terms and conditions set forth in the document.
This Crowe Universal entity whose behalf ye authority to bind Licen governs Licensee's us after signing in to Crow	Adsorption Agreement ("License") is made between Crowe LLP having a place of business at One Mild Am and executing the Agreement (heritrafiler, "Licensed") each a surry" and together the 'parties' Access to each surry of the Agreement (heritrafiler) and the Agreement of the Agreement (heritrafiler) and of the Licensed Works, "Il License does not accept the License as indicated above, License may not acce execute information Exchange (Wed Jul 00 2020).	enter Plaza, Suite 700, Oak Brock, Illinois 60181, and any of its assigns or successors in interest ("Cover") and the the Lecred Works Interenation defined will be provided via a vessate ("Websitch"). You romened that you have see, use or install any part of the Licensed Works. This Agreement is effective upon dicking the 1 Accept" batts
WHEREAS, Growe is the	e legal and beneficial owner of the Subscribed Works (hereafter defined), and desires to license the Subscri	ibed Works to Client; and
WHEREAS, the Client of	Jesires to obtain a Subscription to use the Subscribed Works solely for its internal business purposes and si	ubject to the terms and conditions of this Agreement.
NOW, THEREFORE, in	consideration of the mutual covenants, terms and conditions set forth herein, and for other good and valuab	e consideration, the receipt and sufficiency of which are hereby acknowledged, the parties agree as follows:
1. Definitions. The c now or in the future:	lefinition of terms set forth in this Section 1 shall apply in this Agreement (in addition to terms expressly def	Ined elsewhere herein) including any and all exhibits, addendums, and amendments made to or incorporated her
(a) "Action" before the Effective Di	means any third-party claim, suit, action, cause of action, or proceeding in the Territory alleging that the Sub ate, or any copyright or trademark of that third party in the Territory.	scribed Works or Documentation violates, infringes or misappropriates any U.S. patent issued and published on
(b) "Data Ve	ndors' shall mean the third-party vendors that supply Crowe with the Third-Party Data.	
(*) (*)	entation" shall mean any user manuals or instructions for the Subscribed Work, prepared by Crowe and provi	ided to Client, whether provided online or in printed form.



### Subsequent Login to Crowe Exchange

You will get an email from Crowe when you are added to a site (project).

1. Click on the link in the email and the login screen will appear. Type your email in the **Email** field and click **Next**.

**Note:** You can also login to Crowe Exchange by typing https://secureexchange.crowe.com in your web browser.



2. Type your password in the Password field. Then click Sign In.



3. Click **Send Code** to have a code sent to the mobile number you set up in MFA.

**Note:** If you want the code sent to your email that you set up in MFA, click the **arrow** next to SMS and select **Email Authentication**. Then select **Send me the code**.

#### If you choose to send a code to your mobile device, you will see:



### If you choose to send a code to your email, you will see:



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4. Once you receive the code, type it in the Enter Code field and click Verify.

Note: Click the box next to **Do not challenge me on this device for the next 7 days** if you don't want to have a code sent for 7 days. Otherwise you will be prompted to receive a code and enter a code every time you log into Crowe Exchange as part of MFA.



**Note:** Crowe Exchange will time out after 15 minutes of inactivity. You will get a pop-up with the time remaining as you get closer to the expiration time.



The Send Code page will appear for you to log back in.



### Accessing Okta Administration Page

You can access Exchange's Okta administration site to update the following items:

- Personal Information
- Security Image
- Extra Verification
- Display language
- Change Password
- Forgotten Password Question
- 1. Type <u>https://crowe.okta.com/enduser/settings</u> into your preferred internet browswer.
- 2. Enter the email address you use to login to Exchange, click Next.



3. Enter your Exchange password. Click Sign In

A Ci	rowe
?	
Sign	In
Email	
Password	
••••••	
Remember me	
Sign	In

4. From this dashboard, you'll be able to access all of your Okta security and profile settings for Exchange. You can update your profile information, password, and update your Forgotten Password Question here.

Personal Information	Change Password
	Password requirements:
First name	At least 8 characters
	<ul> <li>A lowercase letter</li> </ul>
Last name	<ul> <li>An uppercase letter</li> </ul>
	A number
Okta username	A symbol
	No parts or your username     Doer not include your first name
Primary email	Does not include your last name
Secondary email	Your password cannot be any of your last 24 passwords
Mobile phone	
	Forgotten Password Question
Title	
	Select a forgotten password guestion so you can reset your password