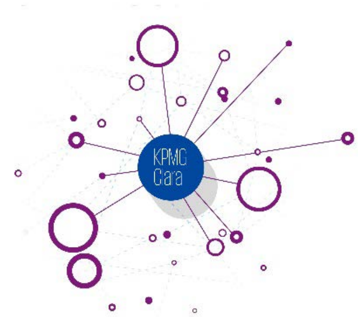
KPMG Clara

January 2021

Introduction

This document is designed to provide external/client users with a comprehensive guide to the resources and materials available for KPMG Clara.



General

Quick Start Guide

The Quick Start Guide is a simple summary resource to understand how to get started using KPMG Clara.

KPMG Clara Client Quick Start Guide Learn about the onboarding experience, including administrative actions and agreements before getting started, as well as technical and security information.	Quick Start Guide

Client login

Client users are required to log in to their KPMG Clara site using a unique username and password.

Client Login and Password Reset Learn how to log in to KPMG Clara for the first time, as well as how to reset your password, along with answers to other common login questions.	Quick Reference Card	

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Detailed guidance

Guidance by area

Available Quick Reference Cards (QRCs) and short training videos for specific functionality on the site.

Audit Committee Learn how to use the Audit Committee tile to view current and prior period Audit Committee presentations.	Quick Reference Card	n/a
Audit Status Learn how to use the Audit Status tile to see the status of the audit.	Quick Reference Card	n/a
Calendar Learn how to use the Calendar tile to see and create new events.	Quick Reference Card	n/a
Control Deficiencies Learn how to use the Control Deficiencies tile to facilitate related discussions with your KPMG engagement team.	Quick Reference Card	n/a
Homepage Learn about the different tiles and functionality available to you from the Homepage.	Quick Reference Card	n/a
Joint Working Tile Learn how to use the joint working tile and other custom document libraries created by your KPMG engagement team.	Quick Reference Card	Video
Alerts Learn how to enable and disable various alert notifications.	Quick Reference Card - PBC Alerts Quick Reference Card - Other Alerts	Video
PBC Management and Requests Learn how to manage the Provided by Client (PBC) requests, such as checking outstanding items, uploading documents, adding comments, and running status reports.	Quick Reference Card - PBC Management Quick Reference Card - PBC Lists	Video
PBC Reports Learn how to create Provided by Client (PBC) reports for a summary of PBC documents added or modified as well as comments associated with the requests.	Quick Reference Card	Video

Statutory Audit Tracking Learn how to use the Statutory Audit Tracking tile to facilitate project management and tracking of the statutory audit process across the group.	Quick Reference Card	n/a
Tasks Learn how to add and track tasks throughout the audit cycle by using the tasks log.	Quick Reference Card	Video
Your KPMG Team Learn how to use the Your KPMG Team tile to see and export contact information for your KPMG engagement team.	Quick Reference Card	n/a

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Cumulative Guidance

The User Guide is a compilation of the individual QRCs in one convenient document.

KPMG Clara Client User Guide	User Guide