



KPMG Clara collaboration quick start guide

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Overview

KPMG Clara collaboration is the client-facing element of the collaboration capabilities within the KPMG Clara smart audit platform. KPMG Clara collaboration enables engagement teams and clients to share documents in a single, centralized location and facilitates real-time interactions with your KPMG engagement team. Throughout the audit, access KPMG Clara collaboration for increased visibility and transparency into the status of your audit. Learn more about our smart audit platform [KPMG Clara](#) and the key features of [KPMG Clara collaboration](#) that enable more meaningful engagement with your audit team.

Before you start

To use KPMG Clara collaboration, you'll need to indicate your agreement with our Terms of Use. Expect your KPMG engagement team to include the Terms of Use language within your audit engagement letter or to directly send the Terms of Use to a member of your management with signing authority to review and electronically sign.

Security

Your organization's data security is top of mind. KPMG Clara collaboration is US hosted on KPMG's secure Microsoft M365 environment and utilizes Azure Business-to-Business authentication. If you have questions or additional security information requests, simply reach out to your KPMG engagement team to request the security and data protection document, a whitepaper detailing key IT security specifications of the platform.

IT administration

To ensure a smooth onboarding process, it is important that an IT administrator for your organization reviews the following recommendations:

- Understand your organization's [Active Directory](#) and how it works with Azure Active Directory Business-to-Business, the technology utilized for accessing KPMG Clara collaboration. User ID/emails and passwords used for login are managed by your

organization's IT; therefore, it is important to share with users of KPMG Clara collaboration what your organization's primary User ID/email and password is when accessing technology through your Active Directory.

- KPMG Clara collaboration leverages the Microsoft Office 365 platform, including SharePoint Online, and should be accessed using a modern browser that is supported by that platform. Further details of Microsoft Office 365 browser compatibility are available on Microsoft's website [here](#). Note: KPMG Clara collaboration is not compatible with IE11.
- Whitelist the https://kpmgus.sharepoint.com/* and https://login.microsoftonline.com/* URLs as trusted sites to ensure cookies are accepted.
- Add these email addresses as trusted email domains to ensure you receive email notifications and alerts from KPMG Clara collaboration: donotreply@kpmg.com and noreply@kpmg.com.

Onboarding and login

Once the Terms of Use is signed, your KPMG engagement team will identify a KPMG Clara collaboration user from your organization to perform a walkthrough of the registration and login process. A welcome email will then be sent to all other intended users of KPMG Clara collaboration that includes the site web address, [login guidance](#), and other helpful resources.

Get started

Your KPMG engagement team can introduce you to your site and share how KPMG Clara collaboration will improve communication and project management to provide an exceptional audit experience. Ask your KPMG engagement team for more information on any of the [enhanced capabilities](#) available within KPMG Clara collaboration. While KPMG Clara collaboration is intuitive and easy-to-use, in-application guidance task panes accessible through the  button of any screen make it easy for you and your organization to confidently learn the technology using simple videos and quick reference cards.