Sightline Client Quick Start Guide

This guide gives an overview of the Sightline platform
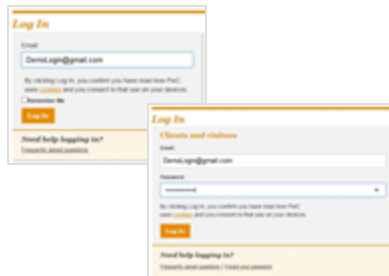
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pwc

Logging in

To log into the system:

1 Navigate to
https://sightline.pwc.com

2 Enter your User Name (email address) and click Continue.

3 On the next screen enter your Password and click 'Log In'.

Initial registration for access to PwC applications

If you are a new user requiring access to PwC's applications, you will be registered prior to your initial access. Once added to an engagement by your engagement team, you will receive an **Account Activation** email from PwC. Click **Activate your account** in the initial activation email. Create desired PwC credentials and provide a phone number for verification. PwC will verify your identity by providing a code via text or phone call. Select preferred method to receive verification code. Enter verification code and click **submit**. Once account activation confirmed, use the username and password created to log in to sightline.pwc.com.

Two-Step Verification

Two-Step Verification is required for external access to PwC applications, including Sightline. You will be asked to verify your identity with an authentication code, shared via text or email. Your information is remembered for 30 days when logging in from the same device, browser or operating system. When the time has expired, or if the user uses a different device, browser or operating system, you will be asked to follow the Two-Step Verification process again.

Forgotten password

If you forget your password, click the **Forgot Your Password** link on the password screen. You will be prompted to enter your email. Follow the steps in the **Account Assistance** email received from PwC (no_reply@registration.pwc.com).

Federated security

Where your organisation has federated security enabled with PwC (single sign on), after navigating to the Sightline platform you will return to your own authentication system to enter your organisation credentials including username and password. After entering this information, you should be automatically redirected back to Sightline.

Global Landing Page

The **Global Landing Page** provides you with a listing of each engagement you have with PwC. Expand the client section and click on the Engagement name or territory link to navigate to the relevant Homepage for that particular Engagement (e.g. GCS 2019 Corporate Income Tax site).
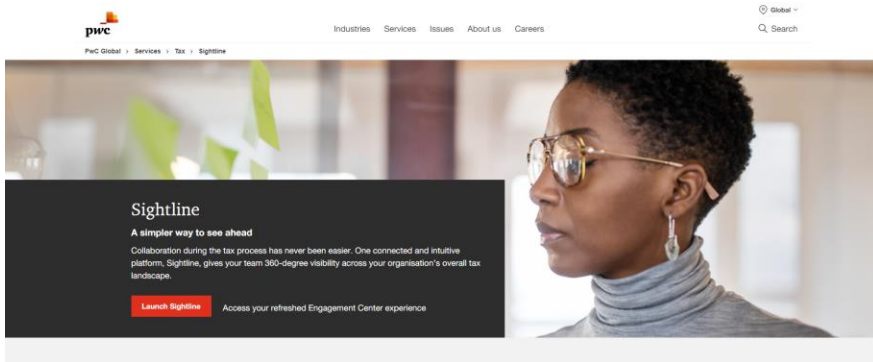
Engagements either stand alone as an individual engagement or link to a Parent Engagement for roll-up reporting as part of an **Engagement Collection**. Engagements linked to a Parent Engagement are called Child Engagements.

Your engagements list provides direct access to all of your engagements with PwC. Your list will display up to 300 engagements and lists them by the date they were most recently viewed or modified. If you have over 300 engagements, you can locate any that aren't displayed in the initial 300 using **search** and **show more**.

You can also visit your customized **Company Homepage** and **cross-client reporting** from the Global Landing Pate.
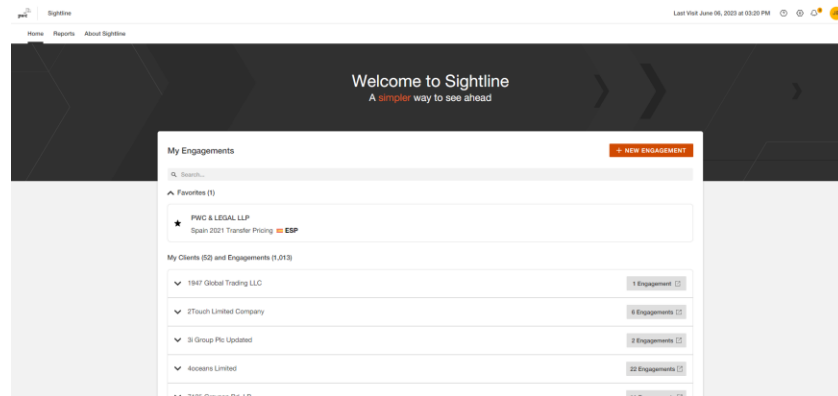
Welcome Page

The welcome page is the first point of entry into Sightline for the client.

When external users navigate to Sightline (sightline.pwc.com), they will be presented with the following:

- Overview of Sightline's core benefits and impact
- New features relevant to you

This page will be available to all external users and will be the first point of entry into our unified platform. Upon clicking the **Launch Sightline** button, a client user will enter their login credentials and proceed with accessing their engagements.

Engagement Collections

Engagements can either stand alone as an individual engagement or link to a Parent engagement to support roll-up reporting as part of an Engagement Collection. Engagements linked to a Parent Engagement are called Child engagements.

An **Engagement Collection** is a collection of your PwC engagements to support reporting across a set of engagements. A collection is comprised of child engagements linked to a Parent engagement for the same Client.

A **Parent engagement** is an overarching engagement linked to child engagements for the same Client portfolio. Parent engagements collect data from their Child engagements to support aggregated reporting across an Engagement Collection, available in Sightline Reports and Dashboards.

A **Child engagement** is a secondary engagement linked to an overarching, Parent engagement.

A **Single engagement** is an engagement that is not part of an Engagement Collection, but a standalone project in Sightline.
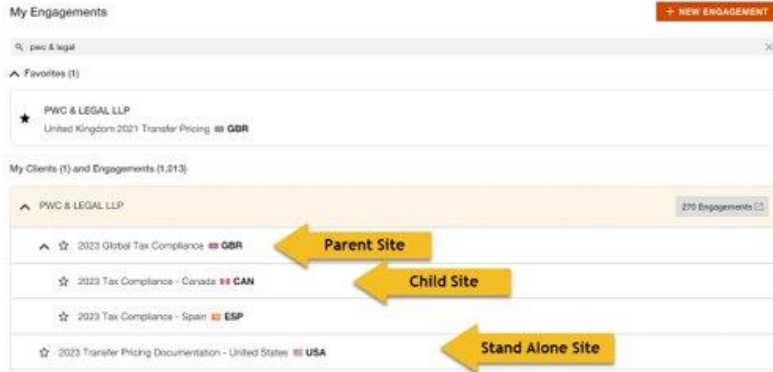
Company Homepage

The Company Homepage is your cross-engagement view of all PwC projects for your company. The Company Homepage aggregates data across platform applications of upgraded engagement sites and visualises data in various information widgets.

The **My Engagements Widget** provides a list of all PwC engagements to which you have access.

The **Deliverable Phase Widget** provides a breakdown of engagement deliverables and their current phases. If you don't have any deliverables in your engagement, the widget will show you all the phase colors with the legend.

| **Quick Tip:** | You can navigate directly to reports by clicking on the menu icon, located on the top right of the widget. |

The **Due Dates Calendar Widget** provides a calendar-centric view of the due dates assigned for each PwC deliverable within Tracker.

The **Bookmarks Widget** provides quick links to frequently visited sites and industry-relevant articles chosen for you by your PwC team.

The **Contacts Widget** shows a comprehensive list of all the team members that have been listed as a contact within each engagement.
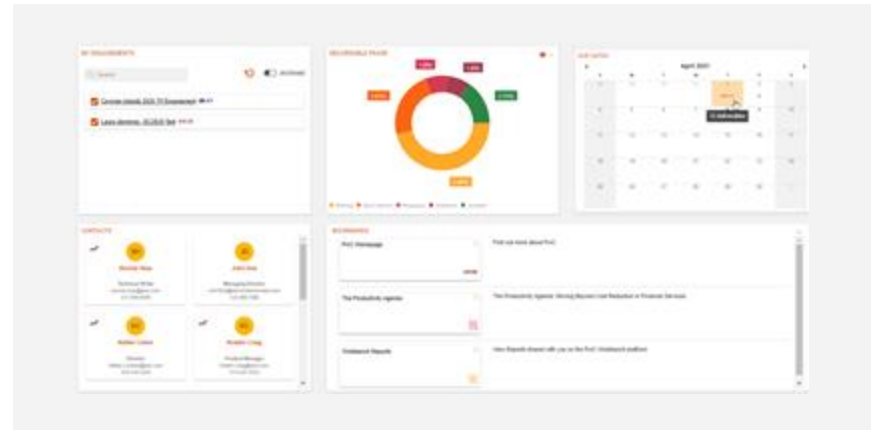
Use the engagement menu to navigate between apps in an engagement. Dashboards is the default view when entering an engagement.

Reporting Dashboards

Engagement Dashboard

The Engagement Dashboard is the default view upon visiting an engagement site. The Engagement Dashboard contains various widgets that summarise engagement data and provide quick links to information. Navigate between Sightline's core applications with the top menu bar.

Use the **engagement and client dropdowns** to navigate between engagements.

The **Deliverable Phase Widget** provides a breakdown of PwC deliverables and their current phases.

The **Requests Widget** shows the status of engagement information requests and queries.

My Approaching Tasks Widget shows tasks have that overdue and approaching deadlines.

The **Bookmarks Widget** provides quick links to frequently visited sites and industry-relevant articles chosen for you by your PwC team.

Deliverable Progress Dashboard

Maintain a clear understanding of where your PwC projects stand with the Deliverable Progress dashboard. This dashboard visualises deliverable status for your engagements and is the default view when visiting a Parent engagement.

Deliverable Phase provides a breakdown of engagement deliverables and their current phases.

The **World Heat Map** shows the status for each territory based on the latest non-completed deliverable.

Deliverables is a grid view of deliverable details.

Deliverable Due Date Dashboard

Monitor multiple PwC engagement deadlines with the Deliverable Due Date dashboard. This dashboard offers an overview of engagement due dates and deliverable health in respect to the assigned legal due date.

Due Dates is a calendar view of the due dates assigned to deliverables in Tracker. Coloured dots indicate the current phase of the deliverable.

Deliverable Health by Legal Due Date breaks down deliverable health for deliverables with an assigned Legal Due Date in Tracker. Deliverables without a Legal Due Date are included in the leftmost bar.

Deliverable Status is a grid view of deliverable details, including due dates, phase and status. Click a row to view the deliverable details. Territories with ten or more deliverables in the engagement will consolidate to an accordion view. Click the orange arrow to view deliverables associated with the territory.

Request Dashboard

Stay on top of data requests and client queries with the Requests Dashboard. This dashboard summarizes the inventory and status of requests and queries within your engagement(s).

Requests highlights breaks down the requests and queries in the engagement(s) by type (Request, Query to Client, Query from Client and Internal Request) and their current health (on time, impending, overdue and complete). Click the rows to filter the dashboard by either criteria.

Requests status gives an overview of the number of items associated with each status (drafted, requested, answered, completed). Filter the dashboard by status by clicking the associated status row.

Workload distribution shows how many items are assigned to the PwC team, the client team, both teams and unassigned items. The bar chart breaks down the items by status. Hovering over the colored sections will display how many items are have that status. Click the bar chart to filter the dashboard accordingly.

Requests progress displays an overview of the requests and queries in the engagement(s) by due date. Items with no associated due date will show in the No Due Date column.

Request details groups requests and queries by (1) engagement, (2) their related to type (deliverable, entity, entity group or the engagement), and (3) their related to name (the name of the item the request is related to). Use the orange arrows to expand the table rows and navigate to the item in the Requests app.
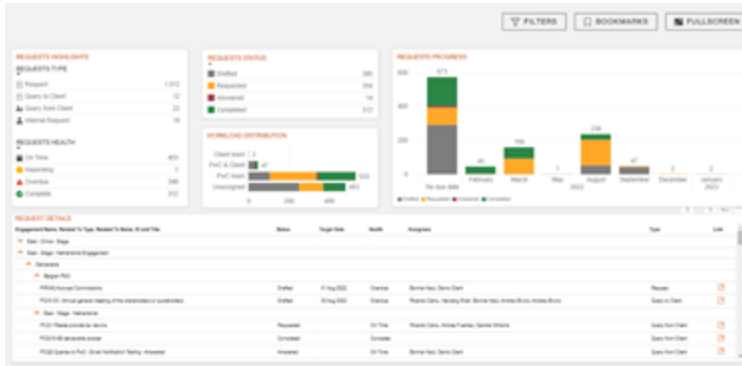
Reporting Dashboards Scope

The scope of Reporting Dashboards varies based on dashboard and engagement type.

The **Engagement dashboard** shows data from only the engagement selected in the Engagement dropdown despite its role as a parent, child or single engagement. In other words, you won't see aggregated data on the Engagement dashboard.

The Deliverable Due Date and Deliverable Progress dashboard scope depends on whether it is connected to a single, child or parent engagement:

- Dashboards connected to a **child** or **single** engagement display data for a child or single engagement only – child engagements will not show data from the associated parent or other child engagements in the Engagement Collection.
- Dashboards connected to a **Parent** engagement display data for all engagements in the Engagement Collection that the user can access.
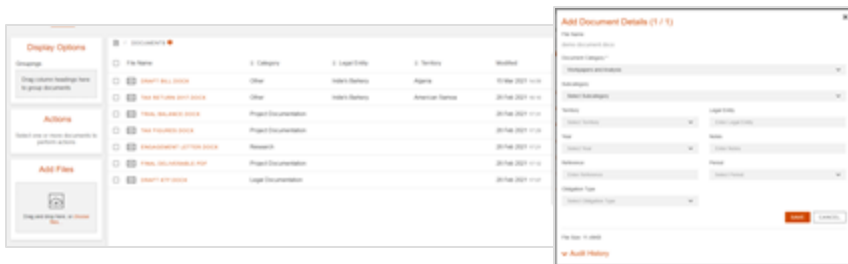
Documents

Documents can be securely shared directly between all members of the engagement team
– client and PwC.

The document app displays the documents that have been shared with you for the purpose of this engagement. It will include final deliverables available for you. You can also upload documents relevant to this engagement.

Uploading a document

- Drag and drop the document(s) in the upload box
- Select the relevant category and additional details to enhance your organisation.

In case of multiple files, add them to a zip folder to upload them all at once. You can apply document details to all documents within the zip folder by selecting **apply to all documents.**

View documents

- Use the Columns picker to choose which columns appear on the display page.
- Drag and drop column headers within the groupings dotted area, with the exception of 'file name' and 'modified'.
- Once headers are in the grouping box, you can reorder them and click apply at any time to customise the grouping structure to your needs. Click the X to remove groupings.
- Use the search bar to search for documents in your engagement.
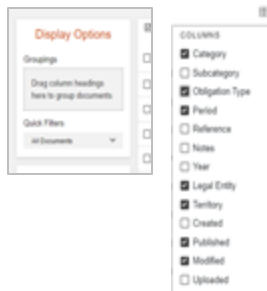
Requests

Access requests by selecting Data from the engagement menu.

Answering an Information Request

If you have been assigned an Information Request, you can respond by selecting the relevant Request row to open the slide out. Once selected, you can respond with text as well as upload documents relating to the matter.

You can also answer Information Requests with a document only. Click the arrow icon on the item row to select a document to attach as your answer. The status will update to *Answered* when the document is uploaded.

Notifications

Email notifications to receive alerts about activity happening in Requests is set to *Daily Summary* by default. To access notification settings, click the icon in the top right corner of your engagement and select **Requests Settings.**

Raising Queries to PwC

You can also raise a Query to PwC for the engagement team to respond to. Click the plus icon to Add a Query to PwC.

Follow the form in sequence by:

- Adding a title – in regards to what the query is
- Assign the relevant PwC team member you want to direct your Query to
- Select a response date
- Add text in relation to your Query
- Attach a file to provide further information
- You can also attach a URL link if relevant
- You can Save as Draft, Publish or Disregard your query.
- A PwC engagement team member will respond to your Query.
- Relate the query to the engagement, a legal entity, entity group or deliverable.
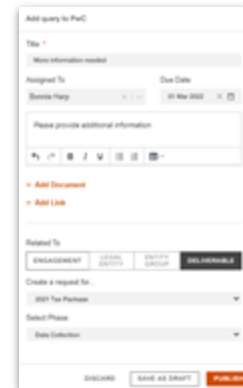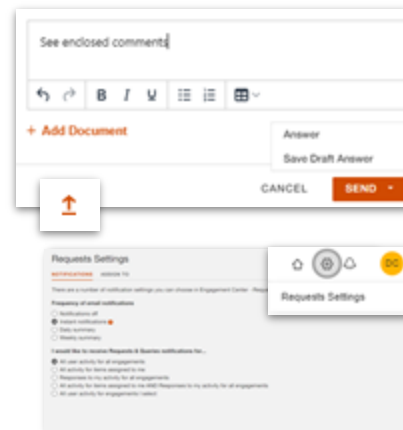
Tracker

Go to Tracker by selecting the **Deliverables** option on the engagement menu. Tracker is the Sightline work plan management application that offers real-time visibility and insight into Deliverable status and responsibilities of everyone involved. Use the left navigation pane to move between 3 view options: Deliverable View, Board View and Task View.
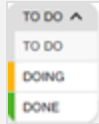
The progression of work through phases is visualised in **Deliverable View**.

Tasks View allows you to see a detailed view of your engagement activities. View and modify Task and Subtask names, start and end dates, and responsibilities.

Deliverables can be broken into discrete tasks. Tasks move through their own status stages:

- To do
- Doing
- Done

Filters – Utilise filters to narrow down your results

Quick Add – Use the Quick Add tool in order to quickly add individual Deliverables and Tasks to your work plan. Choose "+Deliverable" or "+Task".

Task status is visualised below in **Board View**, with interactive drag and drop.

Reports

Reports provide powerful visual and interactive insights into your engagement data. They provide aggregated data across your engagements to provide real-time insight into engagement status.
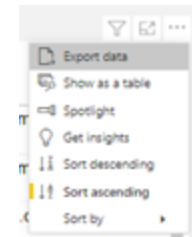
Different reports will be displayed as tiles. Click View Report to dig into your engagement data.
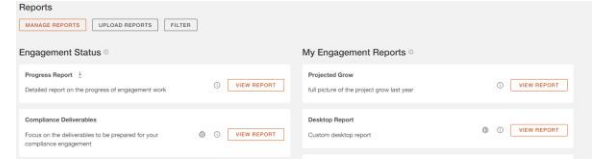
Narrow data by using the data slicers on the left side of the screen.


Click the **filter button** for more advanced filters to narrow your data. Click 'full screen' to maximise your report to fill your screen.

You can find the **export data** from Reports. Use the export option under the more options menu in a report. Access the more options menu by clicking the three dots in the top right corner of the report.

Notifications

Stay up to date with engagement activity with Sightline's in-app Notifications. New notifications appear for PwC and client users as a numerical symbol on the bell icon on the My Homepage Page.
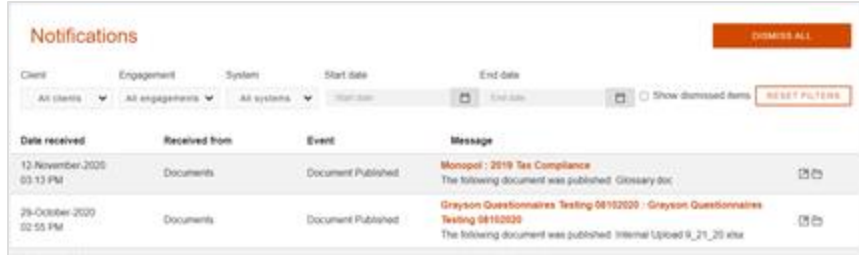

Email Notifications

Receive a daily or weekly email summary of engagement activity.

Email Notification Settings are available in your User Profile. Access your User Profile by clicking the yellow icon with your initials in the top right corner of Sightline.

Daily Summary will be set by default.

Change Email Notifications by selecting to receive a **Weekly Summary** or **Notification Off** under Email Notification Frequency.

A **PwC Sightline Digest** email will be sent to the email address associated with your Sightline account at the selected cadence.
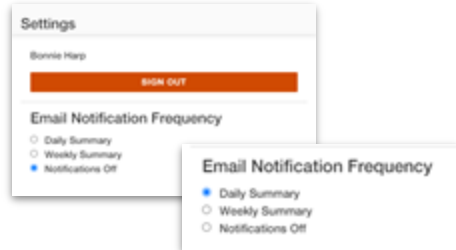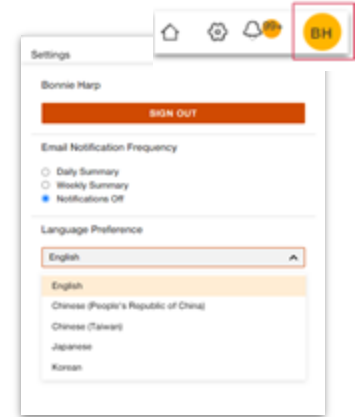

Language Preference

Language Preference Settings are available in your User Profile. Access your User Profile by clicking the yellow icon with your initials in the top right corner of Sightline.

English is Sightline's default language.

Select your preferred language in the dropdown menu and the platform will immediately appear in your chosen language.

Thank you

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