



# Sightline

## Frequently Asked Questions for Clients

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**Commented [1]:** @jennifer.babinec@pwc.com - I've updated this from a rewording perspective but could you ask one of your team to validate the accuracy of these FAQs as they are pretty longstanding?  
\_Assigned to Jenn Babinec (US)\_

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## Part 1: General information about Sightline

### Accessing Sightline

#### How do I access Sightline?

Sightline will be live on 19 June 2023. All existing engagements within Engagement Center will remain when the platform rebrands to Sightline. All current functionality and applications used in EC will remain the same.

Access your engagements in Sightline from anywhere in the world. PwC clients and staff can use the URL below to access Sightline.

- [sightline.pwc.com](https://sightline.pwc.com)

Upon entering the platform for the first time, clients will be directed to our Welcome Page where they will be asked to enter their PwC credentials to log into the platform.

Client users need to be verified by PwC before accessing any PwC applications, including Sightline. When you are added to a new engagement in Sightline, PwC will check if you are verified for PwC application access:

- If you are already verified, use your PwC credentials to log into Sightline.
  - If you are not verified with PwC, you will receive an email prompting the user activation process. See the next question for how to complete the activation process.

Note on 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 the Sightline platform.

#### How do I complete the activation process if I am not already verified with PwC?

Complete the user activation process with the following steps:

- Click the Activate your account button on the initial activation email.
- Enter your email address and create a password for the PwC application access.
- Insert a mobile phone number for 2-step verification process - you should use the appropriate format for your mobile phone number based on your local territory.
- Click Submit.

Once credentials are submitted, PwC will verify your identity by sending a verification code via phone call or text message:

- Select whether the verification code should be sent by phone call or text message.
- Click Send.

You will be prompted to enter the verification code:

- Enter the code received via phone call or text message.
- Choose Resend code to have the verification code sent again.
- Choose Select different method to receive code by an alternate method.
- Click Submit.

A confirmation message will appear confirming your account has been activated. Proceed to log into Sightline with your new PwC account credentials.

### **How do I reset my password?**

You may need to reset your password for Sightline. Changing the password for Sightline will update your password to access all PwC applications. Follow the steps below to reset your password:

- Click Forgot Password from the log-in screen.
- Enter your email address and click Next.
- Check your email for the PwC account password reset email.

Click reset your password within the password reset email from PwC.

Verify identity:

- If your phone number is registered with PwC, verify your identity with the verification code received by text or phone call
- If your phone number is NOT registered with PwC, verify your identity by answering knowledge-based security question(s).
- Complete the Reset password form and click submit.
- Log in to Sightline with your updated credentials.

\*If you do not have a registered phone number or knowledge-based question, please reach out to your Engagement team for assistance.

### **What is two-step verification?**

Clients are required to verify their identity with a one-time authentication code upon logging into Sightline.

- A one-time verification code will be shared via email or text message
- Client 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, they will be asked to follow the Two-Step Verification process again.

### **What is the difference between a Client Manager and a Client Contributor role in Sightline?**

Permissions in Sightline vary by application. Below are general descriptions of the two client roles across the platform. If you need specific permissions within a specific application in Sightline, reach out to your PwC Engagement team contact.

**Client Manager:** Client Managers are external users with elevated access and permissions in engagements. Client Managers have all permissions of Client Contributors plus the ability to create deliverables in Tracker.

**Client Contributor:** Client Contributors have full transparency into the state of an engagement and its associated deliverables, tasks, documents, data collection and reporting. Client Contributors have full viewing rights and can edit items they created, exceptions to this are noted in the detailed role and permissions.

### **Can I add other users to the engagement?**

An external user does not have permissions to request users to be added to an engagement. If you need to add a team member, please reach out to your PwC Engagement team contact directly.

## Technology Readiness and Troubleshooting

### What are the preferred browser and PC recommendations for Sightline?

Google Chrome is the **preferred browser** for best user experience. Supported browsers include the following:

- Google Chrome v79 and after
- Microsoft Edge v44 and after

The **best browsing experience** is on a desktop browser. Browsing from tablets is not recommended and

browsing from smartphones is not supported.

**Screen resolution:** Sightline will scale dynamically to the screen resolution, however for optimal experience browse in 1920x1080 resolution or higher, zoom screen to 100%. If using an iPad

(Legacy) 1st and 2nd Generation, view in Landscape View no smaller than 1024 x 768 px.

**Supported languages:** English; Japanese.

Be sure to complete the **Sightline Client Technology Checklist** to ensure that any technology challenges are addressed prior to the deployment of our Sightline platform with your organisation. Please reach out to your PwC Engagement Team contact to get access to the checklist.

### What is the inactivity timeout?

Client users will be logged out of Sightline if they are inactive for 2 hours or more.

### What do I do if I am having difficulty accessing Sightline? Are there any troubleshooting tips?

Keep the **Sightline Troubleshooting Guide** handy for all troubleshooting tips. If you have not already received this from your PwC Engagement Team contact, please reach out to them to request the guide.

## Security

### Where can I get more information on the security of Sightline?

Ask your PwC Engagement Team contact to share the Sightline Security Statement with you. This will be a good starting point to addressing any security related questions.

## Notifications

### What notification options are available in Sightline and how do I activate notifications?

Email notifications are available for the Requests application and In-platform notifications are available for Documents. Read about each below:

#### Activate email notifications for Requests:

- Start by clicking on the cog wheel icon in the upper right corner of the App and select 'Notification Settings'.
- Then select your frequency of email notification preference:
  - **Notifications off** – No emails will be sent
  - **Instant Notifications** – Receive email notifications within a few minutes of user activity within Requests.
  - **Daily Summary** – Receive a daily email summarising Requests activity.
  - **Weekly Summary** – Receive a weekly email summarising Requests activity.
- Then choose the type of notification:
  - **All user activity for all engagements** – Receive email notifications for all user activity on all engagements of which you are a member.
  - **Responses to my activity for all engagements** – Receive email notifications when users respond to your activity on all engagements of which you are a member.
  - **All user activity for engagements I select** – You'll receive email notifications for all user activity for the engagements that you select.
- Your selections are automatically saved, you can navigate back to Requests from here.

#### Access In-Platform Notifications:

New notifications appear as a numerical symbol on the bell icon on the Global Landing Page and Parent Engagements.

Notifications will be available in Sightline on an application by application basis. Currently, Sightline Documents is the only application with In-Platform Notifications. You will receive notifications for the following actions:

- A document is uploaded (published) by a PwC team member

- A document that is visible to the client user (a published document) is deleted



## Part 2: Core Applications and Services

### Requests

#### What is the purpose of Requests?

Requests avoids the need for exchanging sensitive information over email by providing a secure space for us to communicate with you, and for you to communicate with your PwC team. Request or provide information, upload documents, and follow up on queries directly in Requests. It also provides a clear detailed trail of all Information Requests including responses and documentation.

#### How do I respond to a Request or Query from the PwC team?

If you have been assigned an Information Request or Query, you can respond by selecting the relevant Request or Query and press the Reply button. Once selected, you can respond with text as well as upload documents relating to the matter. If uploading a document, you will also need to select a category for the type of information you are uploading using the drop-down list and pressing Publish.

#### How do I create a Request or Query to the PwC team?

Create an individual Request by clicking the Create button in the top right corner of the Queries to PwC view. Select relevant Deliverable, Legal Entity or Reporting Group. Fill out the form in sequence, attach links or files and publish for PwC. If multiple users need to be assigned to the Request or Query, click each responsible team member name in the Assign To field. Click the name again to unassign.

#### What is the difference between an Information Request and a Query?

An information request is intended to be used for upfront information gathering. A Query allows you to keep all communication that is not related to upfront information gathering separate under 'Queries'.

#### Can I receive notifications for Requests?

Yes, email notifications are available for Requests. See [question](#) on notifications above.

#### What is the difference between a cleared request and an answered one?

An answered Request or Query has at least one answer provided by the client. The status changes automatically once a client responds.

For a Request or Query to be cleared, a PwC User has to mark it cleared, meaning the conversation is complete.

#### I am unable to upload a document to a reply in Requests if a document with the same name was attached to the Request from PwC, what should I do?

This is a known issue that our team is working to resolve. Until it is resolved, we suggest one of the following workarounds:

- Rename the file a unique name when attaching it to the reply

- Reply in a new Information Request

## Documents

### What is the purpose of Documents?

Documents provides a consistent, safe and secure way for you and your PwC team to exchange project-related documents and files; for all members of the project team to have a single point of reference for documents; and access to shared documents no matter where you are located.

### Is there a max file size for upload?

The max size for a single document uploaded to Sightline Documents is 500MB.

### Are documents virus scanned on upload?

Yes, documents are automatically scanned for viruses. If the document contains a virus the document upload will fail.

### What types of files can be uploaded?

Documents permits the following file extensions for upload: AI BMP CSV DIF DOC DOCX DXL EML GIF HTML JPEG JPG JSON LFD MHT MM MP4 MPP MSG NRL ODP ODS ODT ONE PBIX PDF PNG PPS PPSM PPT PPTM PPTX PRN RTF TWBX TXT VDX VSD VSDX XLS XLSB XLSM XLSX XML ZIP BIZTAX

### How many files can I upload to Documents at once?

There is no limit to the number of files that can be uploaded at once. However, we recommend you upload via zip files if you are uploading a large number of files. This will ease the process of adding documents.

### Can I delete documents from Documents?

You can only delete documents that were uploaded by you.

### How long are documents stored?

Documents are stored for the life of the engagement in the Azure cloud storage. Documents is NOT a system of record, and all documents are purged from the cloud storage after the engagement ends. Be sure to work with your PwC Engagement Team to agree on a plan for document retention at the end of an engagement cycle.

### What happens when a document is 'Overwritten'?

The existing document is replaced with the newly uploaded document, including the contents of the document. No versions are stored in Documents.

### When uploading multiple documents and one or more is an 'Overwrite' what happens if I Cancel the process; will my other documents still upload?

If you are uploading multiple files, you will be presented with a message that lists the files that are uploaded and those that will be overwritten. When you choose Confirm or Cancel at this point you are deciding whether to overwrite. The other documents have already been uploaded.

## Tracker

### What is the purpose of Tracker?

Tracker is a user centric application designed to help you monitor the evolution of a project through its different stages. Value driven and logical, Tracker approaches project management in a simplified way.

### How do I access Tracker in Sightline?

Tracker is available on the top menu bar when you enter your engagement and land on the Engagement Dashboard

### Can I upload documents in Tracker?

Yes, you can upload or associate documents from the Sightline Documents picker to your Deliverable, Task or Subtask as follows:

- Open a Deliverable, Task, Subtask or Phase slide out.
- Navigate to the footer of the slide out and click the Documents tab.
- Click the attach document button.
- Tick the boxes next to the documents that you want to attach to your item or upload a new document.
- If uploading a new document, complete the document details.
- Click Confirm.

### Can I download documents in Tracker?

Download documents in Tracker by clicking the download icon next the file name in the Documents footer in the slide out.

### How do I edit deliverables, tasks or subtasks in Tracker?

Check with your PwC Engagement Team for detail on the permissions for a Client Manager and Client Contributor in Tracker. If you have permissions to edit a deliverable, task, phase, you can edit the deliverable and task details in the respective slide out. Access slide outs by clicking a deliverable or task row. You can also edit phase details by clicking on the corresponding phase card in Deliverable View.

### How do I delete a deliverable, task or subtask?

You can only delete a deliverable, task, or subtask that you created. Delete a deliverable, task or subtask by clicking the trash can icon in the top right of its slide out.

### What do the colored bubbles identify in Tracker?

The coloured bubbles in Tracker correspond with engagement team members. Tracker uses an algorithm based on initials to assign a unique user colour to each user. This makes it easier to identify team member activity and responsibility.

### **What are the relationships between deliverable, task and subtask?**

To facilitate aggregated or 'roll up' reporting, any 'deliverables' are divided into phases. Each phase can be assigned tasks within a deliverable. These tasks can be broken into subtasks.

### **How do I update the phase of an item in Tracker? Will subsequent phases update automatically?**

In the Deliverable View, expand the row of the deliverable that you need to edit. Tick the complete checkbox to update the phase. All subsequent phases will update automatically.

### **How are items sorted or prioritised in Tracker?**

Items are ordered by due date to prioritise upcoming deadlines.

### **Can I bulk upload deliverables and tasks in Tracker?**

Tracker doesn't support bulk deliverable and task upload yet but will support this feature in the future.

### **Can I filter to view tasks only assigned to me?**

You can't filter tasks assigned to you yet, but Tracker will support this feature in the future.

