



# Sightline Client User Guide



# Contents

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## User guidance for the Sightline Platform

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### Accessing Sightline

#



### Navigating Sightline

#

Welcome Page, Global Landing Page, Engagement Types, Company Homepage



### Sightline Core Applications and Services

#

Dashboards, Tracker, Requests, Documents, Reports

### Additional Settings and Services

#

User Management, Contacts, Notifications



### Support Resources

#

# Introduction to Sightline



# Sightline

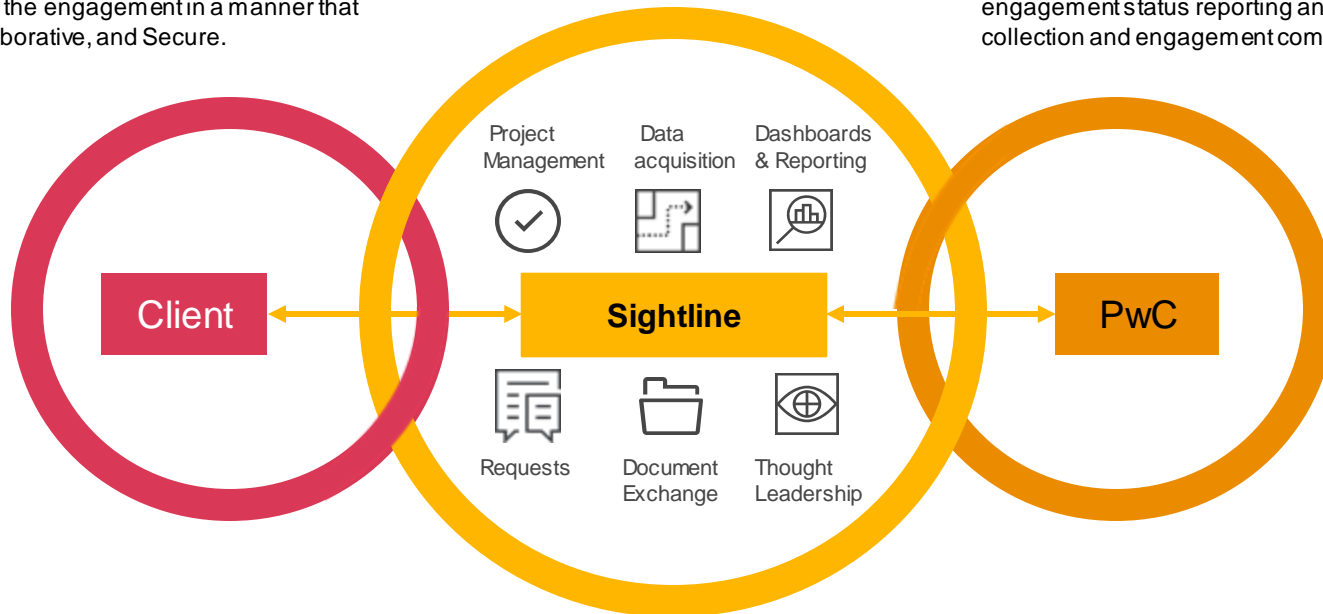
## Transparent

Sightline facilitates the delivery of engagements at PwC. Sightline is a central location for our clients and PwC teams to work during the engagement in a manner that is Transparent, Collaborative, and Secure.

## Collaborative

## Secure

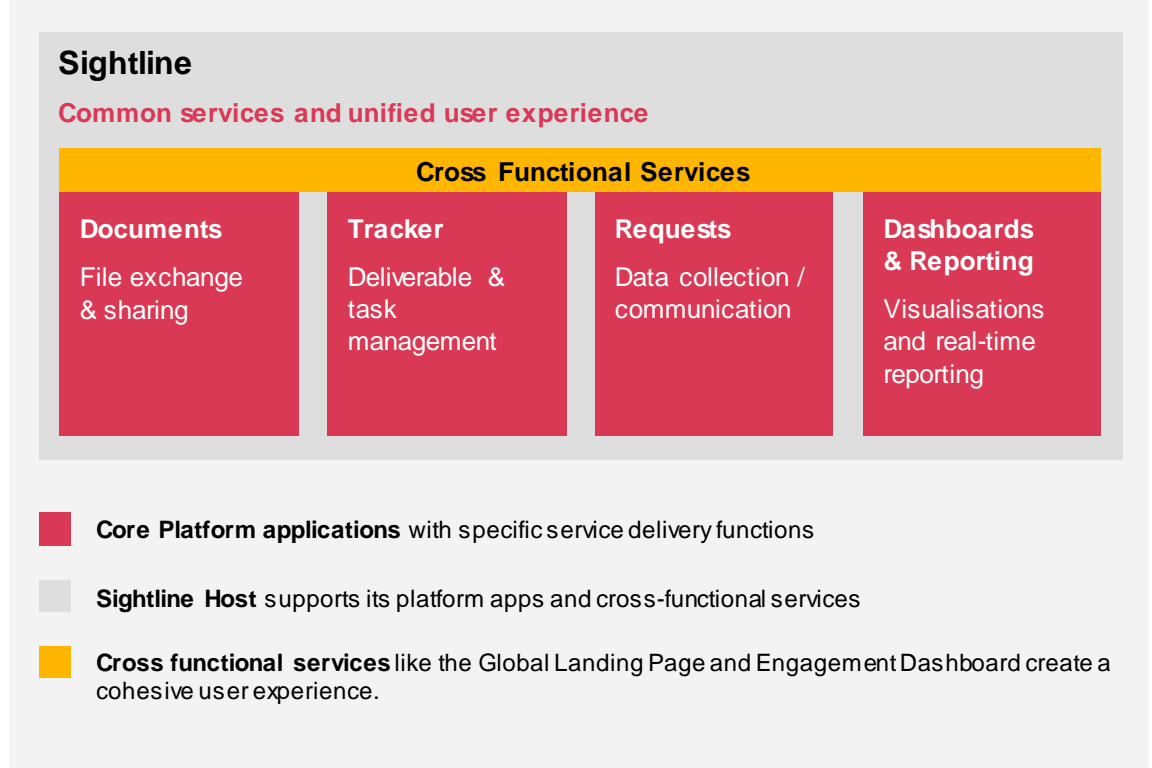
Sightline enables the efficient exchange of documents, monitoring of engagement progress, real-time engagement status reporting and centralises data collection and engagement communication.



# Sightline: How It's Organised

Both PwC and client users access Sightline through the **Global Landing Page**. From there, they can navigate to Sightline sites through an Engagement Index which lists all clients and engagements they have access to. In addition, the Global Landing Page provides features that are relevant across engagements, like creating a new site.

From the My Homepage users access the **Engagement Dashboard** for Parent and Child engagement sites. Parent engagements aggregate roll-up reporting from linked child sites of individual engagements. The Engagement Dashboard provides an overview of your engagement progress and access to core applications.





# Access Sightline



# Accessing Sightline



Navigating Sightline



## Access Sightline

Access your engagements in Sightline from anywhere in the world using :

<https://sightline.pwc.com>

# PwC Account Activation



Client users need to be verified by PwC before accessing any PwC applications, including Sightline. If you haven't registered an account with PwC, learn how to activate your account below.

## PwC Account Activation

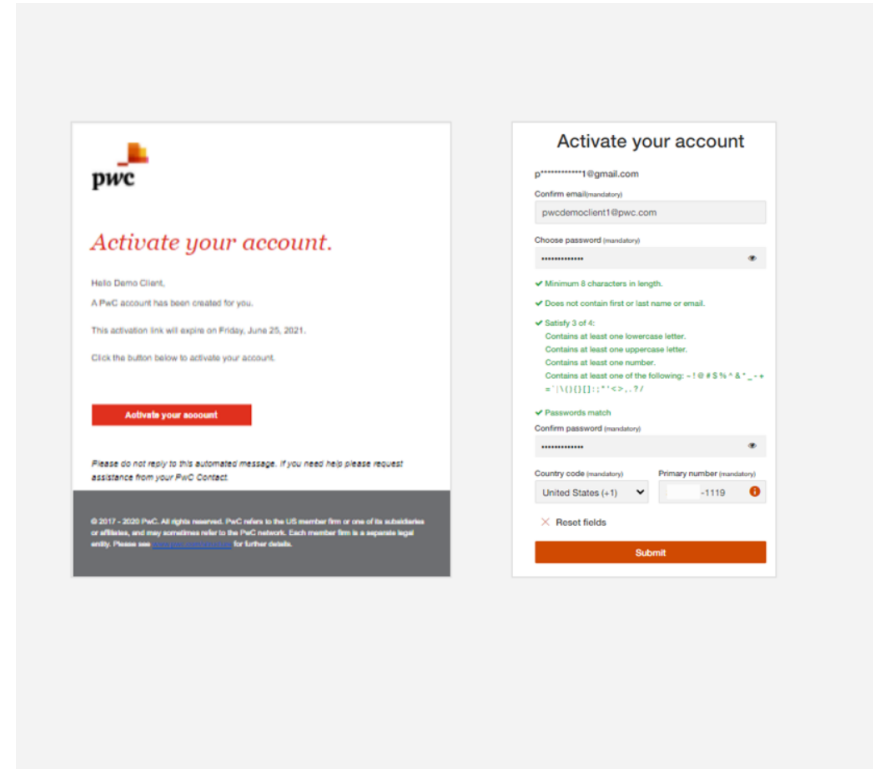
When you are added to a new engagement in Sightline, PwC will check if you are verified for PwC application access:

- If you are already verified, use your PwC credentials to log in to Sightline.
- If you are not verified with PwC, you will receive an email prompting the user activation process.

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 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**.

Process steps continued on next slide.



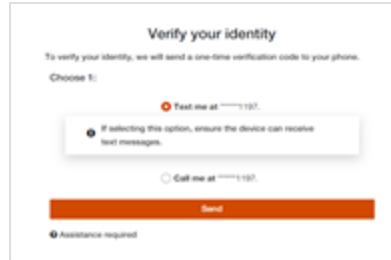


# PwC Account Activation

## Verify your Identity

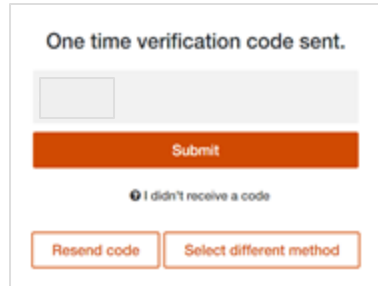
Once credentials are submitted, PwC will verify your identity by sending a verification code via phone call or text message:

- 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**.



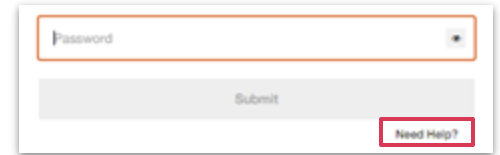
A confirmation message will appear confirming your account has been activated. Proceed to login to Sightline with your new PwC account credentials.

## Password reset

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:

- Enter your email address and click **Next**.  
Click **Need Help?** from the log-in screen.
- Re-enter your email address and click **Next**.
- Check your email for the **PwC account password reset** email.



## 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.*

# Log into Sightline



1

Navigate to <https://sightline.pwc.com>

2

Enter your username and click **Log In**.

3

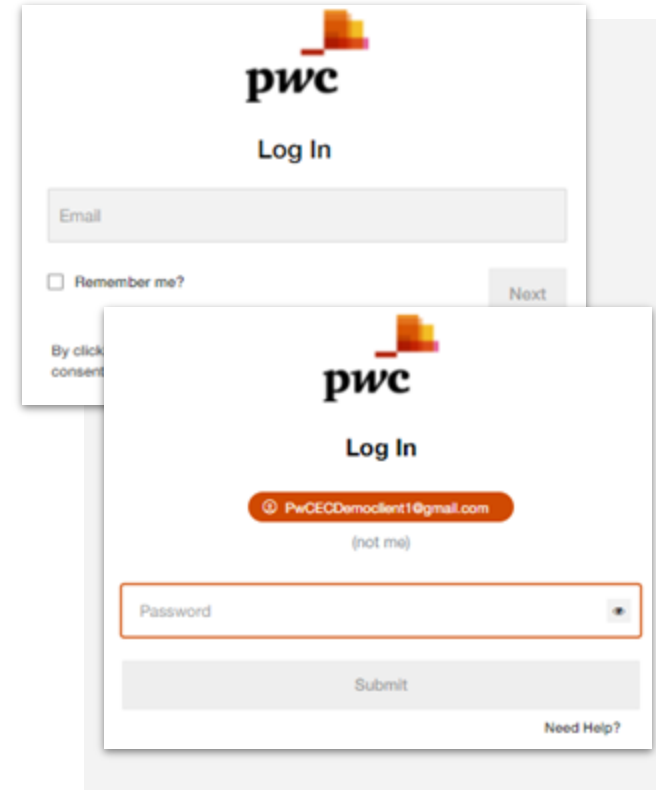
On the next screen enter your Password and click **Log In**.

## Forgotten password

If you forget your password, click the **Need Help?** link on the password screen. You will be prompted to enter your email. Follow the steps in the **Account Assistance** email received from [no\\_reply@registration.pwc.com](mailto: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 the Sightline platform.



# Two-Step Verification



## Two-Step Verification for Client users

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.

## Completing Two-Step Verification

### Log in to using PwC credentials



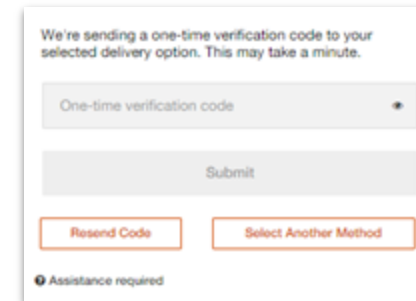
The image shows the PwC Log In form. At the top is the PwC logo. Below it is the text "Log In". There is a text input field for "Email". Below the input field is a checkbox labeled "Remember me?". To the right of the checkbox is a "Next" button. At the bottom of the form, there is a small disclaimer: "By clicking 'Next', you confirm you have read how PwC uses cookies. You consent to the stated use of cookies on your devices."

### Select Two-Step Verification method



The image shows the "Select Two-Step Verification method" screen. At the top is the PwC logo. Below it is the email address "PwCClient1@gmail.com" and "(not me)". The text says "To verify your identity, we will send a one-time verification code to your phone or email." Below this is the text "Choose one of the following options:" followed by three radio button options: "Email me at PwCClient1@gmail.com", "Text me at \*\*\*\*\*1119", and "Call me at \*\*\*\*\*1119". There is a "Send my code" button. At the bottom left, there is a "Assistance required" icon.

### Enter and submit verification code to gain access to Sightline



The image shows the "Enter and submit verification code" screen. The text says "We're sending a one-time verification code to your selected delivery option. This may take a minute." Below this is a text input field for "One-time verification code" with a dropdown arrow on the right. Below the input field is a "Submit" button. At the bottom, there are two buttons: "Resend Code" and "Select Another Method". At the bottom left, there is a "Assistance required" icon.

# Sightline Roles & Permissions



**Before using Sightline, it's important to understand the different client roles throughout the platform. There are various levels of access rights within Sightline, but two are specific to client users – Client Manager and Client Contributor.**

Permissions in Sightline vary by application. Below are general descriptions of 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 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.

Please reach out to your PwC Engagement Team for a more detailed list of Sightline access roles and permissions.



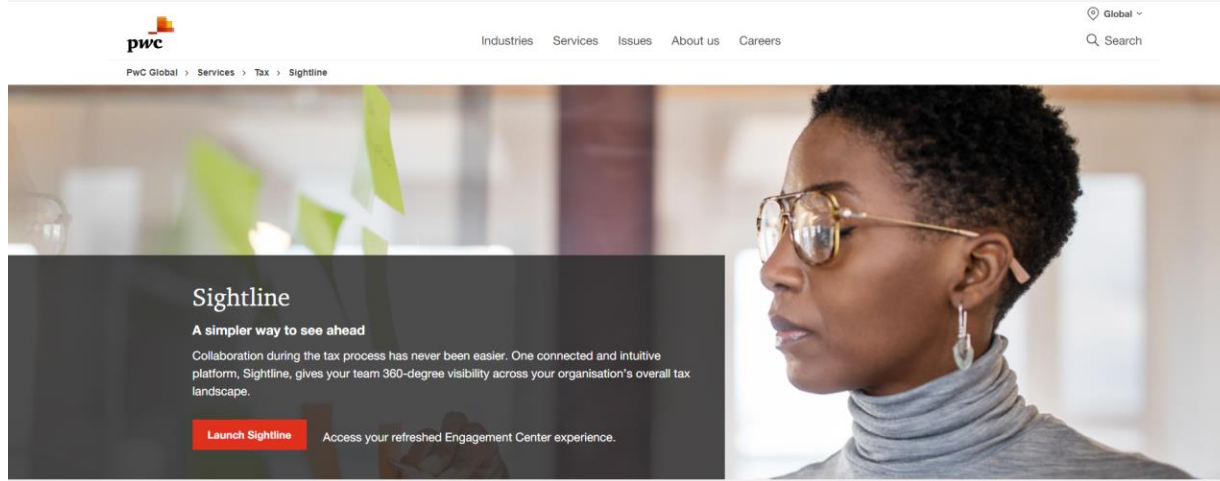
# Navigating Sightline



# Welcome page



Upon accessing [Sightline.pwc.com](https://sightline.pwc.com), the first thing you will see is the Welcome Page.



Access relevant **PwC Thought Leadership** that is pertinent to the way they do business

Upon clicking the **Launch Sightline** button, a you will enter their login credentials and proceed with accessing their engagements.

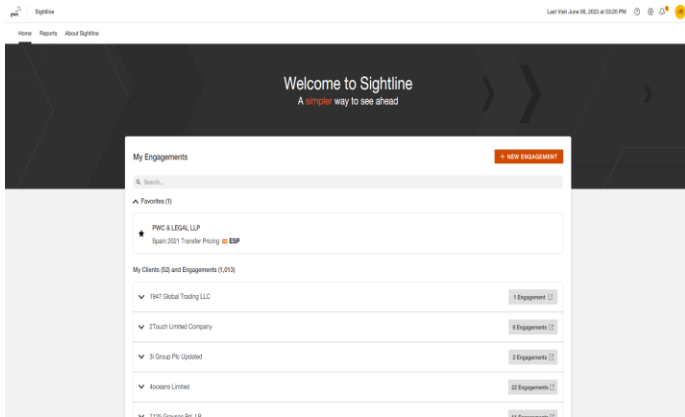
The **Welcome Page** will be the initial page you encounter upon accessing Sightline ([sightline.pwc.com](https://sightline.pwc.com)). If you have logged into Sightline within the past 30 days, you will be redirected to the Global Landing Page.

Visit the Welcome Page at any time by clicking **About Sightline** on the Engagement Index page.

# Global Landing Page



Upon launching Sightline, the first thing you will see is the Global Landing Page. The Global Landing Page provides a single access point to all of your engagements.



## Sightline knows you!

Sightline recognises users and will tailor information on the landing page to your needs.

## My engagements list

Click the orange arrow to expand Client rows to view associated engagements. Click an engagement to access it. Your engagement list shows up to 300 engagements and display based on the most recently viewed or modified. Use Search and Show More to locate engagements not available on the list.

## Search bar

Search your engagements as an easy way to navigate through multiple Clients and engagements. Even if you have more than 300 engagements, the Search functionality will search all engagements you have access to.

## Platform reporting

Click the Reports button to Platform Reporting (cross-client) for your engagements.

## Engagement

Engagements can 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.

## Show More

If you have access to a higher volume of engagements, you may not see all engagements for a Client or a Collection in the Recently Viewed / Modified list of engagements. Clicking Show More for the Client or Parent will allow you to drill-down into that specific context for a more comprehensive list of engagements.

# Engagement Types



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. A collection is comprised of child engagements containing services we provide to you and which you require to be linked together in order to support reporting across that set of engagements.

A **Parent engagement** describes the overarching engagement linked to child engagements within your 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.

A screenshot of the 'My Engagements' interface. At the top right is a '+ NEW ENGAGEMENT' button. Below is a search bar containing 'pwc &amp; legal'. Under 'Favorites (1)', there is a star icon next to 'PWC &amp; LEGAL LLP' with a sub-entry 'United Kingdom 2021 Transfer Pricing' and a GBR flag. Below this is 'My Clients (1) and Engagements (1,013)'. A section for 'PWC &amp; LEGAL LLP' shows '270 Engagements'. Three rows of engagements are listed with yellow arrows pointing to them: '2023 Global Tax Compliance' (GBR) is labeled 'Parent Site', '2023 Tax Compliance - Canada' (CAN) is labeled 'Child Site', and '2023 Transfer Pricing Documentation - United States' (USA) is labeled 'Single Site'.



# 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.

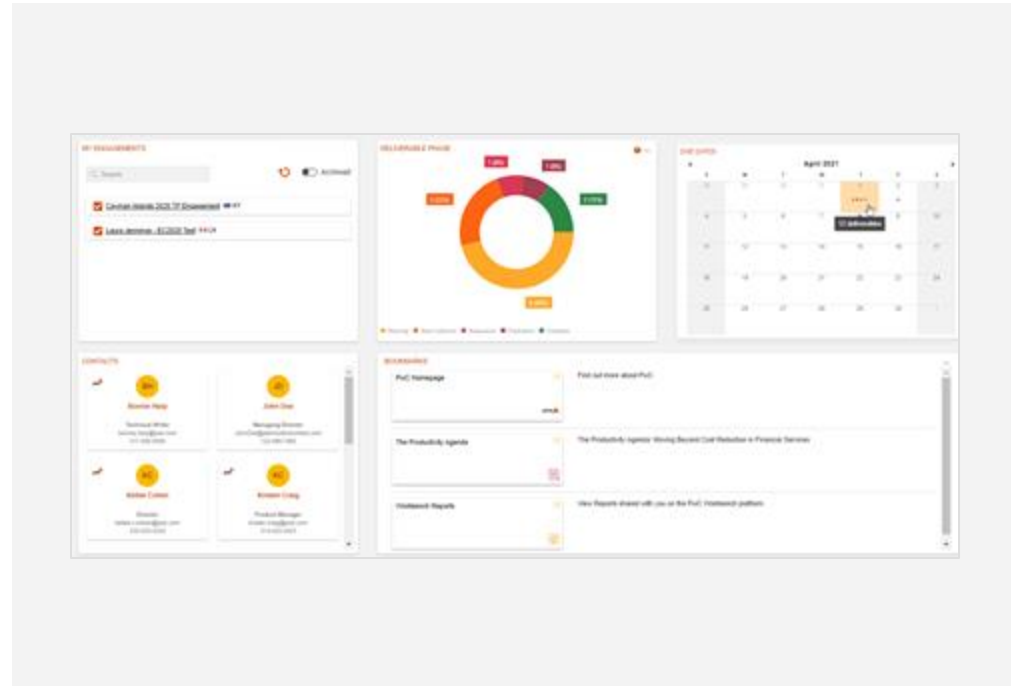
The **Deliverable Phase Widget** provides a breakdown of engagement deliverables and their current phases. If you don't have any deliverables in your engagement, the widget will show you all the phase colors with the legend.

**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.



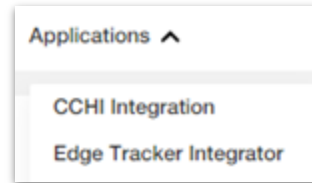
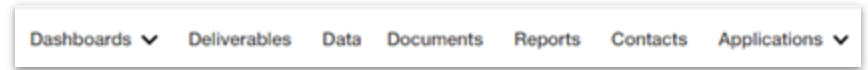
# Engagement Menu




The **engagement menu** is the navigation bar within an engagement. Access Sightline's platform apps with the engagement menu. You can also access other apps enabled in the app centre via the engagement menu.

Some menu items dynamically adapt to the configuration of your engagement. Others always remain the same. Each menu option is described below:

- **Dashboards:** Use the dropdown to view the **Deliverable Due Date, Deliverable Progress** and **Engagement Dashboards** for your engagement.
- **Deliverables:** Click Deliverables to go to **Tracker**.
- **Data:** Click Data to go to **Requests**.
- **Documents:** Use this option to navigate to the **Documents** app for your engagement.
- **Reports:** Access real-time reporting for your engagement in the **Reports** app.
- **Contacts:** View and create contacts for your engagement.
- **Applications:** This option appears at the end of the engagement menu if additional apps are enabled for your engagement.



**Quick Tip:** If only one app is enabled for the engagement, Applications will direct you there. If more than one app is enabled for the engagement, they will be grouped in a dynamic drop down menu under Applications.



# Sightline Core Applications and Services



# Dashboards



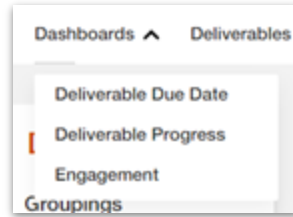
# Reporting Dashboards



**Reporting Dashboards** collect a portfolio of your work in one place, centralising the engagement delivery process and providing you with unprecedented transparency. Interactive visuals summarise engagement progress and enable teams to focus on a selection of deliverables. More details are a click away in PwC's apps, which are built flexibly to accommodate a variety of services.

Dashboards will be the first application visited upon entering your engagement:

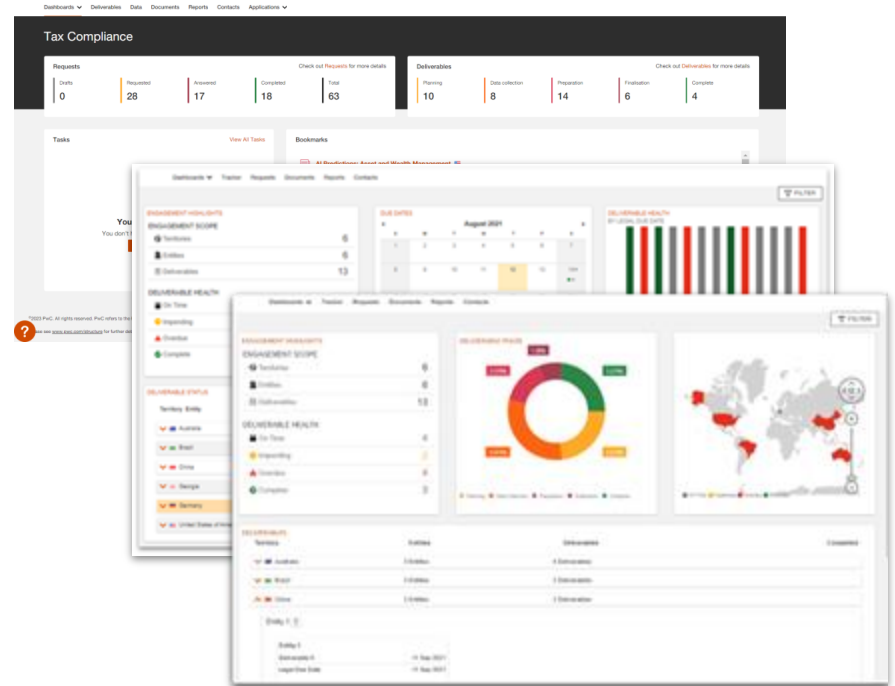
- The Engagement dashboard is the default view when visiting a Child or Single engagement.
- The Deliverable Progress dashboard is the default view when visiting a Parent engagement.



Click the arrow next to Dashboards on the Engagement menu to expand the Dashboards menu and navigate between dashboards.

## Quick Tip:

The scope of Reporting Dashboards varies depending on the engagement type and only includes data from engagements that you can access. Engagements that you can access are listed on the My Engagements List on the Global Landing Page and Company Homepage.



# Deliverable Progress Dashboard



Maintain a clear understanding of where your PwC projects stand with the **Deliverable Progress** dashboard. This dashboard visualises deliverable status with interactive information widgets. The Deliverable Progress dashboard is the default view when visiting a Parent engagement.

**Engagement Highlights** summarise engagement scope (number of territories, entities and deliverables) and deliverable health (on time, impending, overdue and complete). Click on a **deliverable health status** to filter dashboard data accordingly.

**Deliverable Phase** provides a breakdown of the deliverables in the engagement and their current phases. Click a **phase segment** on the donut graph to filter the dashboard data accordingly. If there are not yet deliverables in your engagement, this widget will display all the phase segments with a supplemental legend.

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

- On Time (grey)
- Impending (yellow)
- Overdue (red)
- Complete (green)

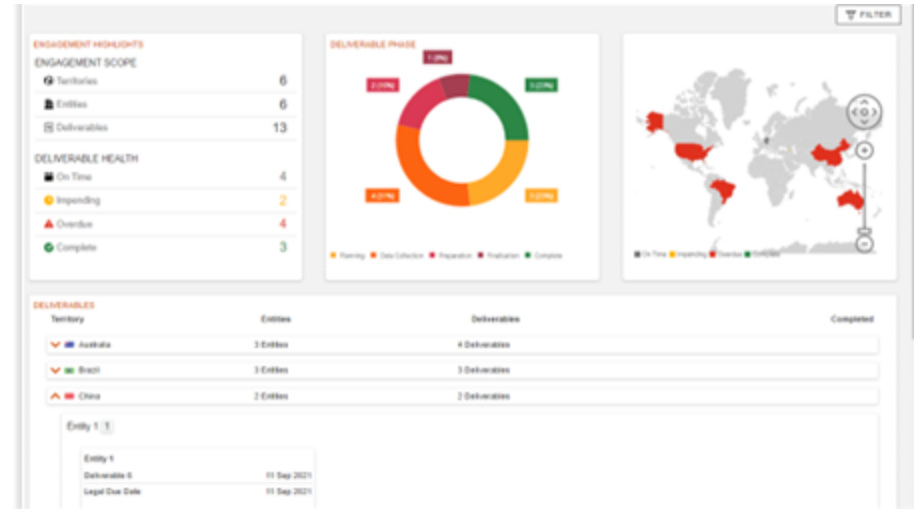
Filter dashboard data by territory by clicking on one or more countries.

**Deliverables** is a grid view of deliverable details, including the number of Entities and Deliverables per territory. Click the **orange arrow** next to a territory name to view deliverables as associated with the territory. Deliverables are grouped by Entity. Click a deliverable card to view its details and navigate to your deliverable in Tracker.

## Quick Tip:

Deliverable health is categorised according to the following criteria:

- If the deliverable is in a state of complete it shows as **complete**;
- If it is not in a state of complete and any due date is overdue then it shows as **overdue**;
- If no dates are overdue and any due date is impending it shows as **impending**;
- If no dates are overdue or impending, the deliverable shows as **on time**.



# Deliverable Due Date Dashboard



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

**Engagement Highlights** summarise engagement scope (number of territories, entities and deliverables) and deliverable health (on time, impending, overdue and complete). Click on a **deliverable health status** to filter dashboard data accordingly.

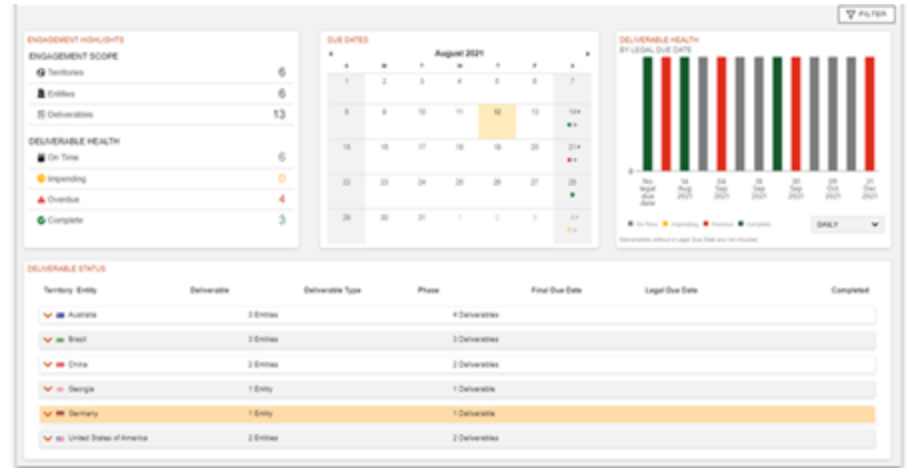
**Due Dates** is a calendar view of the due dates assigned to deliverables in Tracker:

- Hover over a date to see how many deliverables are due.
- Filter dashboard data to a custom date range by clicking the start and end date for a specific duration.

**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.

- Filter data to a daily, weekly or monthly view.
- Click a health status on the Engagement Highlights widget to filter this data accordingly.

**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.



# Engagement Dashboard



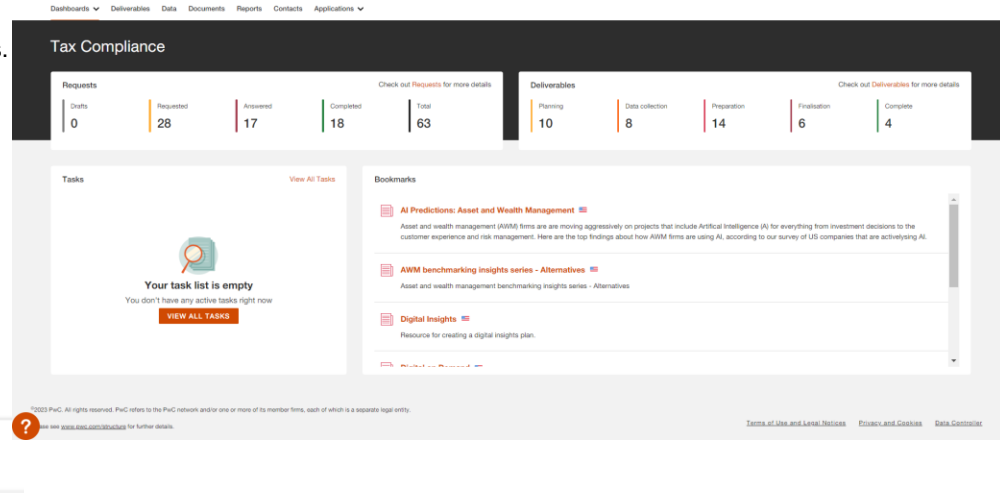
The **Engagement dashboard** is the default view upon visiting a child or single engagement. The Engagement Dashboard contains various summarise PwC engagement data and provides quick links to relevant information.

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

**Deliverables** provides a breakdown of engagement deliverables and their current phases. Click the **donut** to filter the dashboard by phase.

**Tasks** shows tasks have that overdue and approaching deadlines.

**Bookmarks** provides quick links to frequently visited sites and applications outside of Sightline. Reach out to your Territory or Network Champion to request Bookmarks for the Bookmark widget.



**Quick Tip:** 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.



# Child / Single Engagement Scope



This slide describes the scope of Dashboards connected to a **Child or Single Engagement** and applies to all Reporting Dashboards.

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.

You can verify which engagements that you can access on the My Engagement list on My Homepage.

My Engagements + NEW ENGAGEMENT

Search: pwc & legal

^ Favorites (1)

- ★ PWC & LEGAL LLP  
United Kingdom 2021 Transfer Pricing GBR

My Clients (1) and Engagements (1,013)

^ PWC & LEGAL LLP 270 Engagements

^ ☆ 2023 Global Tax Compliance <span>GBR</span>	← Parent Site
☆ 2023 Tax Compliance - Canada <span>CAN</span>	← Child Site
☆ 2023 Tax Compliance - Spain <span>ESP</span>	
☆ 2023 Transfer Pricing Documentation - United States <span>USA</span>	← Single Site

# Parent Engagement Scope



The data shown on Dashboards varies based on engagement type and user access. This slide describes the scope of Dashboards connected to a **Parent Engagement** and applies to all Reporting Dashboards except the Engagement Dashboard.

Dashboards connected to a **Parent engagement** display data for all engagements in the Engagement Collection that the user can access.

Parent dashboard data may vary by user depending on which engagements they can access. You can verify which engagements they are a part of on the My Engagements list on My Homepage.

My Engagements + NEW ENGAGEMENT

Search: pwc & legal

^ Favorites (1)

- ★ PWC & LEGAL LLP  
United Kingdom 2021 Transfer Pricing GBR

My Clients (1) and Engagements (1,013)

^ PWC & LEGAL LLP 270 Engagements

- ^ ☆ 2023 Global Tax Compliance GBR ← **Parent Site**
- ☆ 2023 Tax Compliance - Canada CAN ← **Child Site**
- ☆ 2023 Tax Compliance - Spain ESP
- ☆ 2023 Transfer Pricing Documentation - United States USA ← **Single Site**

# Tracker

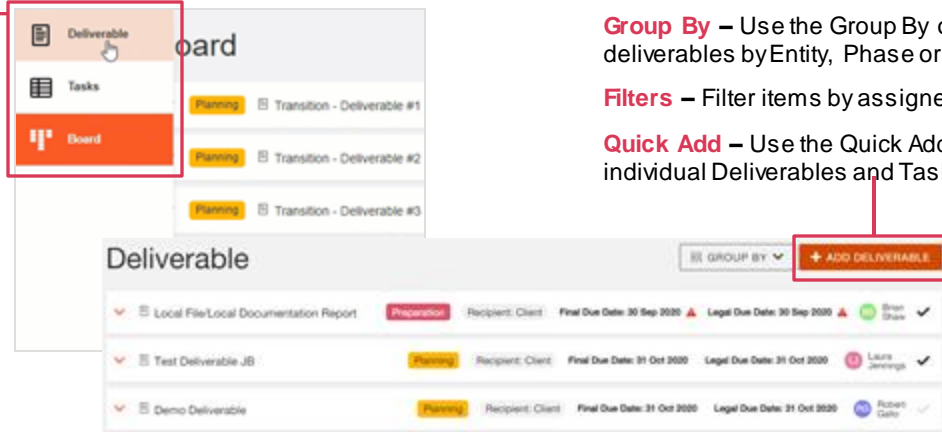


# Tracker

Tracker is used to manage the workflow for the engagement. Access the Tracker by selecting the **Deliverables** option on the engagement menu. Let's take a look at what workflow management looks like with Tracker.

## Views

- **Deliverable:** See a list of engagement Deliverables and an overview of their progress. This view tracks the four phases of the deliverable lifecycle (Planning, Data Collection, Preparation, Finalisation).
- **Task:** See a detailed view of your engagement activities. View and modify Task and Subtask names, start and end dates, and responsibilities.
- **Board:** See the status of work in a categorised and complete overview for your whole engagement – you can see who's working on what and if there are any overdue assignments.

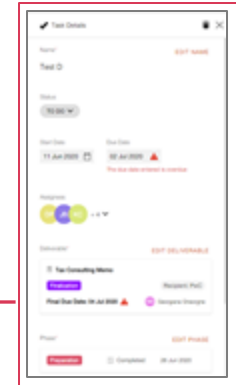


**Group By** – Use the Group By option to group your deliverables by Entity, Phase or Territory

**Filters** – Filter items by assignee or deliverable type.

**Quick Add** – Use the Quick Add button to quickly add individual Deliverables and Tasks to your work plan.

Clicking various line items, tiles or adding Deliverables and Tasks will open the **slide out** where you can make edits and updates

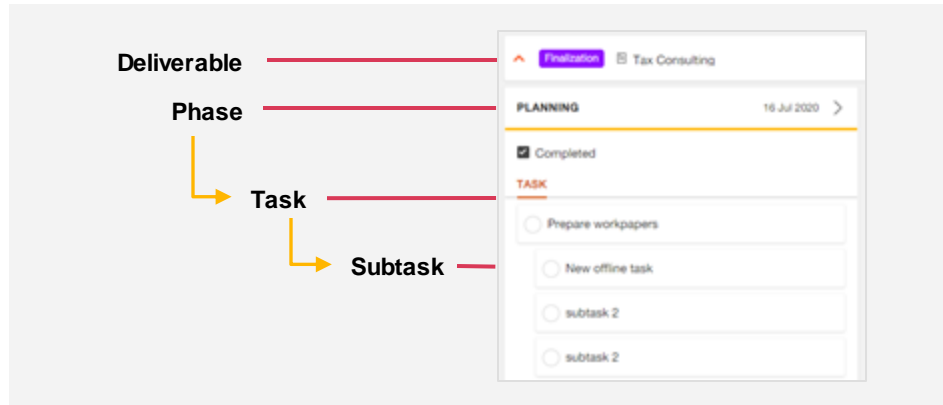


In order to facilitate aggregated or ‘roll up’ reporting, Deliverables are divided into Phases. Each Phase can be assigned Tasks within a Deliverable. These Tasks can be broken into Subtasks. Follow the steps below to add items.

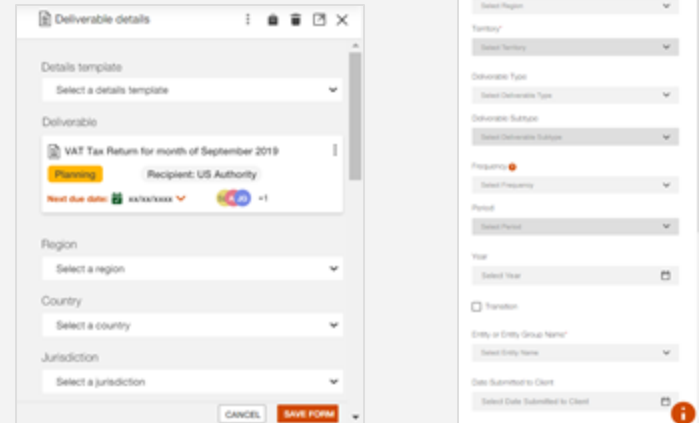
## Create items

If your role on the project permits access to create items, follow the steps below:

- Choose **+ ADD DELIVERABLE** in Deliverable View and **+ ADD TASK** in Task and Board View to add individual Deliverables and Tasks to your work plan.
- The Quick Add + buttons are also within each slide out.
- Add item details to categorise and filter your work plan data.



**Add additional details** in the Deliverable slide out. These fields transform the standard Deliverable into a specific type, allowing you to associate key pieces of information based on the type of work PwC is producing.

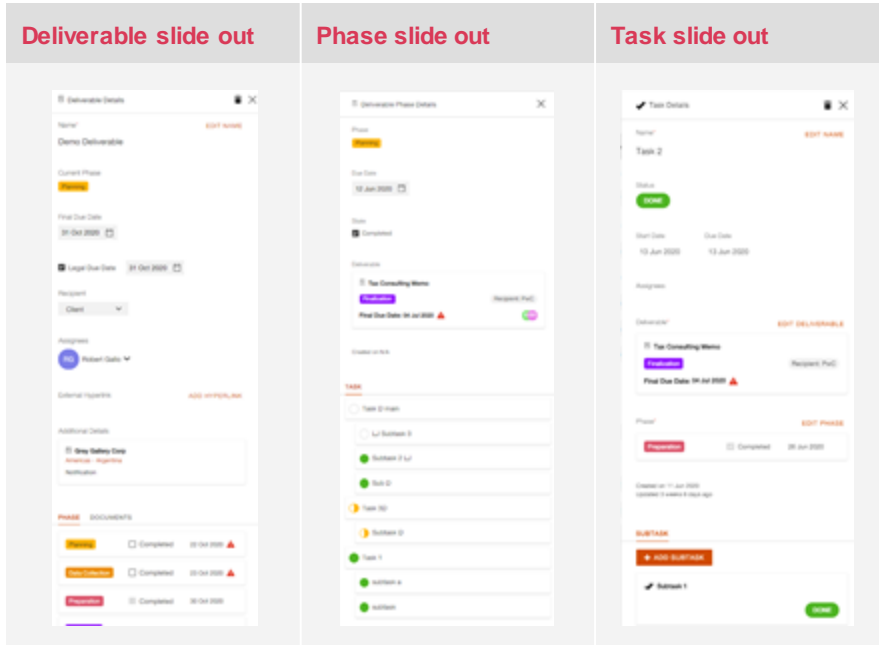




The screenshot shows the 'Add Additional Details' form for a deliverable. The form includes several sections: 'Details template' (Select a details template), 'Deliverable' (VAT Tax Return for month of September 2019, Planning, Recipient: US Authority), 'Region' (Select a region), 'Country' (Select a country), 'Jurisdiction' (Select a jurisdiction), and 'Period' (Select Period). There are also fields for 'Year' (Select Year), 'Transition' (checkbox), 'Entity or Entity Group Name' (Select Entity Name), and 'Date Submitted to Client' (Select Date Submitted to Client). The form has 'CANCEL' and 'SAVE FORM' buttons at the bottom.

# Managing the Detail in Tracker



If you have been granted **Client Manager** access, you can easily manage item details throughout Tracker via the slide outs to **create or edit Deliverables, Phases, Tasks and Subtasks**. If you have been granted ‘**Client Contributor**’ access, you can contribute by updating task and subtask status.



Click on the line items or mini cards in any view to open the slide out with full details slide out. Click the  icon to expand and the  icon to collapse line items.

## Manage Items and respond to deliverables, task and subtasks

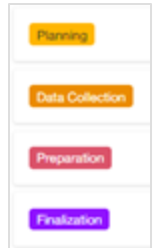
Edit **Deliverables and Phases** within slide outs.

Edit **Tasks and Subtasks** directly in Task View or within slide outs.

Manage item details by adjusting fields within the slide outs:

- Fields will update automatically unless they are **protected fields**.
- Protected fields are indicated by **orange text**.
- To update a protected field, click the orange text, update information, and click the **update** button.

Click the **phase cards** to access phase details.



# Hyperlinks and Documents



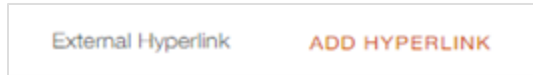
## Add hyperlinks and documents to your Deliverables and Tasks using slide outs.

### Hyperlinks

Easily access a report, Deliverable or other useful resources relevant to your engagement with hyperlinks. Add hyperlinks to Deliverables, Tasks and Subtasks in their respective slide out.

Add a hyperlink:

- Open a Deliverable, Task or Subtask slide out.
- Navigate to the external hyperlinks section and click **add hyperlink**.



- Title the hyperlink and insert the URL using format <https://www.yourlink.com>.
- Click **Add hyperlink**.

External Hyperlink [CANCEL] [ADD HYPERLINK]

Name\*

Demo hyperlink - LinkedIn

URL\*

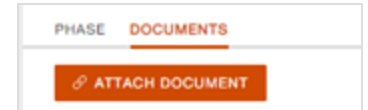
<https://www.linkedin.com/>

Note: Only hyperlinks approved by PwC can be added to your items in Tracker. We'll let you know if your hyperlink isn't approved. If you need to request a hyperlink approval, reach out to your PwC engagement team.

### Attach Documents

Attach documents from the Sightline Documents picker to your Deliverable, Task or Subtask:

- 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.
- Click **Confirm**.



### Download Documents

Download documents attached to your Deliverable, Task or Subtask by clicking the icon next to the document in the slide out footer.



# Requests





# Requests notification settings



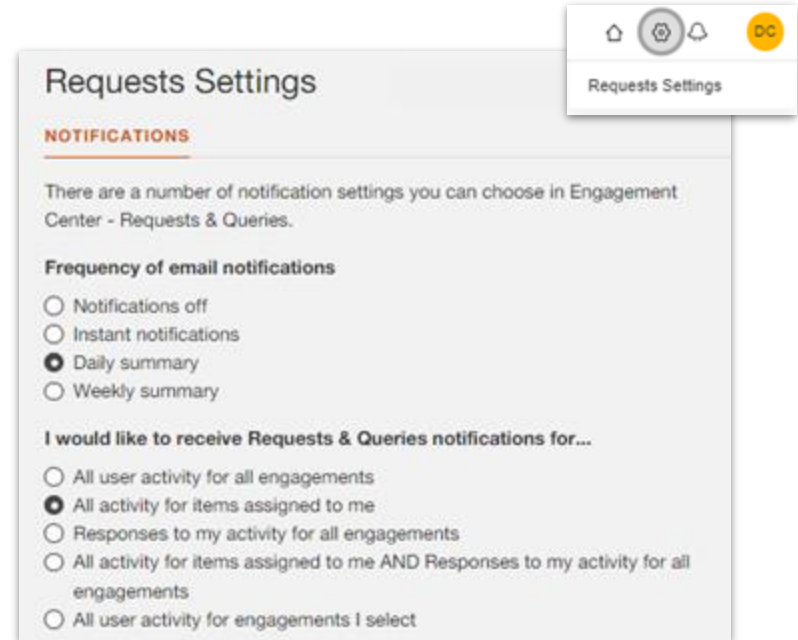
**Subscribe to email notifications to receive alerts about activity happening in Requests. Access Requests settings by clicking the cog wheel in the top right corner of your engagement. You can customise when to receive Notifications for Requests under the Notifications tab.**

## Frequency of email notifications

- **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.

## Types of notifications

- **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.
- **All activity for items assigned to me** - Receive email notifications any activity in information requests or queries assigned to you in Requests.
- **All activity for items assigned to me AND responses to my activity for all engagements** - Receive email notifications any activity in information requests or queries assigned to you in Request, as well as any responses to your activity.



# Requests overview



The **Requests** app allows you to communicate with your PwC team directly within Sightline, providing many benefits:

- All correspondence and documents exchanged between us can be found easily in one place.
- All data is safeguarded and secure within the platform, minimising risk and controlling access.
- You can see at a glance all requests and their status, enabling complete transparency between us.

## Navigate Requests

- **Information Requests** shows Information Requests from PwC, along with the status of whether you or your team have responded. Any draft responses to Information Requests, along with attachments included in those drafts, are visible to PwC.
- **Queries to PwC** displays all queries that have been raised to your PwC engagement team, separate to any responses you've provided to Information Requests. Pending and completed queries will appear here. Any draft Queries, along with attachments included in those drafts, will be visible to PwC.

## Generate PDF

You can generate a PDF of items in Requests within an engagement by using the Generate PDF button:



- Use the checkboxes to customize what is included in the PDF (Information Requests and/ or Queries to PwC)
- Click download and the PDF will automatically download to your desktop.

## Status

Requests tracks the status of requests and queries as they progress. **Status cards** display the count of items within a particular view and a breakdown of their status:

- **Total** – All items within the selected view (e.g. Information Requests).
- **Drafts** – In-progress queries to PwC or answers to information requests that have not yet been sent to PwC. PwC team members can view your drafts, but they cannot edit them.
- **Requested** – Published information requests or queries pending an answer.
- **Answered** – Requests or queries that have received a response and are under review.
- **Completed** – Fulfilled requests and queries that have been reviewed and approved.



# Add a query to PwC

Use the orange plus icon to raise a query with your PwC team. This icon is available within all views through the Requests app.

## Add query to PwC

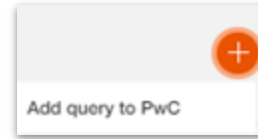
Requests will centralise all communication throughout your engagement. Raise a query with your PwC team in Requests by completing the following fields in the *Add query to PwC* slide out:

- Enter a brief title
- Assign the Query to one or more PwC team members
- Select a due date for completion
- Enter details of your query and what information you require
- Attach files and / or add a hyperlink to the request
- Associate the request with the engagement, a legal entity, entity group or deliverable (as available in your engagement).

**Publish** the request to make it visible to your PwC team. This will move your query to *Requested* status.

Click **Save as Draft** to edit the query at a later time. Drafts can be viewed but not edited by PwC. Click the item row to edit a draft.

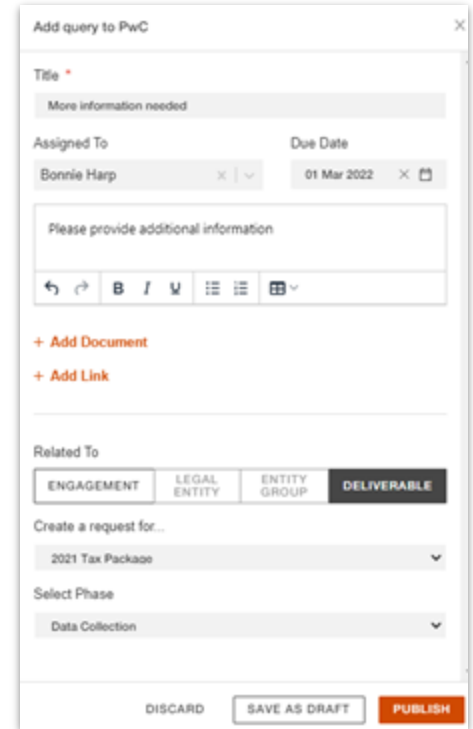
**Discard** your query if it is no longer needed. It will not be saved.



Attached files will upload in the Documents application even if you remove the file or discard your message.

Requests and queries are assigned an ID once created. IDs are located in the first column of the grid:

- **PIR** - indicates Information Request
- **PQ** - indicates Query



The screenshot shows the 'Add query to PwC' form with the following fields and options:

- Title**: More information needed
- Assigned To**: Bonnie Harp
- Due Date**: 01 Mar 2022
- Please provide additional information**: Rich text editor with formatting options (bold, italic, underline, list, link, image).
- + Add Document**
- + Add Link**
- Related To**: ENGAGEMENT, LEGAL ENTITY, ENTITY GROUP, DELIVERABLE (selected)
- Create a request for...**: 2021 Tax Package
- Select Phase**: Data Collection
- Buttons**: DISCARD, SAVE AS DRAFT, PUBLISH

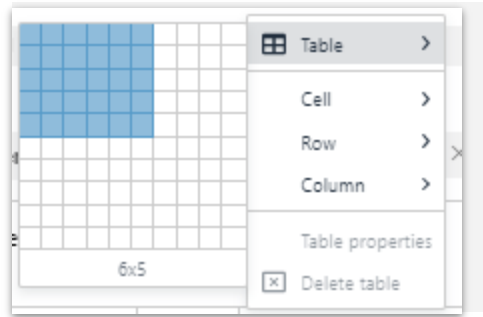
# Format queries

Use the formatting menu within a draft query to format text and insert basic tables.

## Insert table

Use the Table dropdown to insert a simple table into your query.

If you need to retain formatting of an existing table, attach the table as a separate file using the **Add Document** button on the slide out.

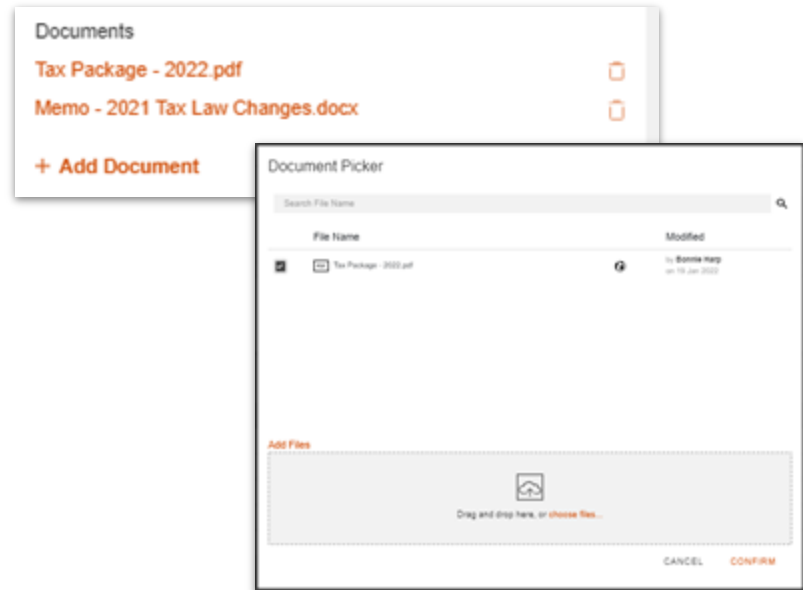


## Attach an existing file from your engagement

Click **+ Add document** to attach a file using the Document Picker. Select the documents from the Document Picker that you want to attach to your message. If your file is not saved in your engagement, upload it to the Doc Picker and it will be stored in Documents.

Remove attached documents by clicking the trash can icon next to the attachment link.

Attached files will upload in the Documents application even if you remove the file or discard your message.



# Answer information requests



Respond to information requests in two ways: a detailed text reply within a slide out, or a quick reply with an attachment only.

## Answer information request from PwC

- Click the item row to open the **Information Request Details** slide out.
- Add a detailed text response in the text box.
- Click Send and then **Answer** to publish the response for PwC. This will move the query to *Answered* status.
- Click Send and then **Save Draft Answer** to save your draft and edit your response at a later time. PwC can see but not edit draft answers - including attached documents.
- **Cancel** your answer if it is no longer needed. Your changes will not be saved.

## Answer with attachment only

Use the upload icon on the item row to reply by submitting an attachment:

- Click the upload icon to select documents from the Doc Picker. Any documents uploaded in Requests will automatically surface in the Documents app.
- Click a status card or refresh the page. Your items will move to *Answered* status.



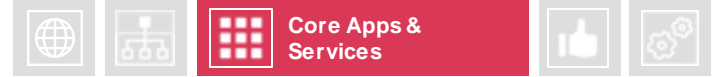
Attachments	Due Date ▾	Status 📌
Tax Package - 2022.pdf	📎	📌 Answered

## Save Draft Answer

You can save a draft of your answer to PwC and come back to edit it later. PwC cannot edit in-progress drafts, but they can view:

- In-progress content within the saved draft; and
- Any documents attached to the draft. Files attached to drafts will automatically be stored in the Documents app.

# Details and discussions



You can view request or query details and have discussions with your PwC team within the Information Request and Query to PwC Details slide out. This slide out is available when an item is no longer in draft status.



## View information request or query details

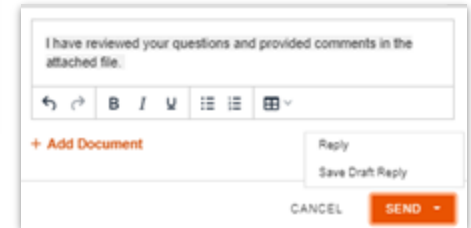
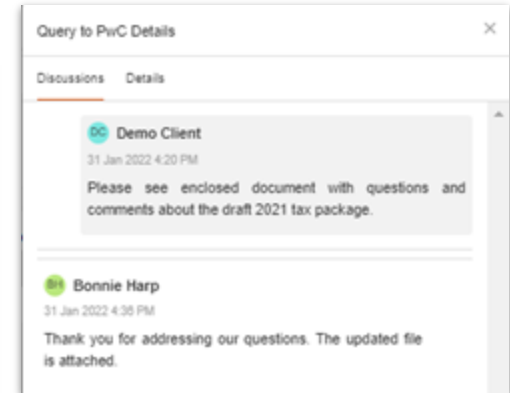
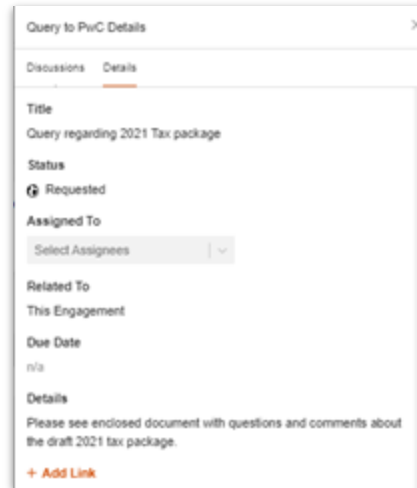
Click the clipboard icon at the end of an item row to open the **Information Request or Query Details** slide out.

The **Details tab** displays key information about the request or query, including title, status, assignees, due date and the body of the request.

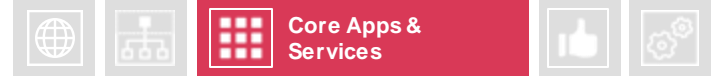
## Discussions

The **Discussions tab** provides a conversation thread about the item with your PwC team. Your PwC team members may use the discussion thread to ask follow up questions before formally answering or completing a query.

Use the text box in the Discussions tab to converse with your PwC team. Click send and then reply to send your message to PwC. Select Save Draft Reply to save your message and edit it later.



# Search and filter items



**Requests** makes it easy to sort, filter and locate items. Filter by status, assignee and due date or use the search bar to locate specific items in Requests.

## Filter requests and queries

Filters apply to items within a particular tab. Filter items in Requests in a variety of ways:

- Click a status card to filter your items by **status**. The grid will update to show only the items within the particular status.
- Click the filter icon on the Assignees column to filter items by **assignee**.
- Click the filter icon on the Due Date column to filter items by **due date**.

## Search requests and queries

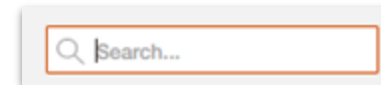
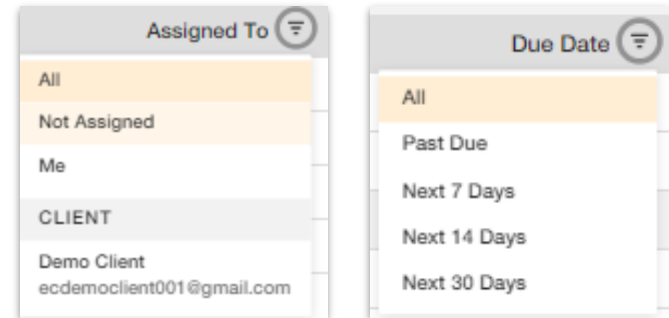
Use the search bar to search items in Requests. Requests will search items within the tab selected at the top of Requests (Information Requests, Queries to PwC). Search by the following criteria:

- Title
- Description (body of request or query)
- Content within discussions

Press enter to filter items according to your search. If a filter is applied, only filtered items will be searched.



Clicking a status card refreshes your view. If you change the status of an item, click a status card to update the count and the status noted in the grid.



# Documents





# Documents overview



Go to Documents by selecting **Documents** from the engagement menu. Exchanging and collaborating on documents is one of Sightline's most important capabilities. Add documents to your engagement by uploading them in Documents. Documents exchanged in Requests will automatically surface in Documents. The default view will show a list of all documents uploaded within your engagement.

## Group documents

Create a 'virtual folder' view, group your documents by attributes by dragging the column headers into this field.

## Actions

Use **Actions** to download multiple documents at once.

## Add documents

Drag and drop files into this field or click on **choose files**. Add document details.

## Column picker

Choose which columns appear on the display page

A screenshot of the 'DOCUMENTS' interface. The interface is divided into several sections. On the left, there is a 'Display Options' sidebar with three sections: 'Groupings' (containing a text box 'Drag column headings here to group documents'), 'Quick Filters' (with a dropdown menu set to 'All Documents'), and 'Actions' (with the text 'Select one or more documents to perform actions'). Below this is an 'Add Files' section with a file upload icon and the text 'Drag and drop here, or Choose files...'. The main area is a table with columns: 'File Name', 'Category', 'Legal Entity', 'Territory', 'Published', and 'Modified'. The table contains five rows of test data. On the right, there is a 'COLUMNS' sidebar with a list of columns and checkboxes: 'Category' (checked), 'Subcategory' (unchecked), 'Obligation Type' (checked), 'Period' (checked), 'Reference' (unchecked), 'Notes' (unchecked), 'Year' (unchecked), 'Legal Entity' (checked), 'Territory' (checked), 'Created' (unchecked), 'Published' (checked), 'Modified' (checked), and 'Uploaded' (unchecked). Red lines connect the text descriptions on the left to their corresponding UI elements in the screenshot.

# Add Documents

The screenshot displays the 'Add Documents' interface. On the left, there are three panels: 'Display Options' with a 'Groupings' section, 'Actions' with a selection instruction, and 'Add Files' with a drag-and-drop icon. The main area shows a table of documents under the heading 'DOCUMENTS'. The table has columns for 'File Name', 'Category', 'Legal Entity', and 'Territory'. The 'Add Document Details (1 / 1)' dialog box is open, showing fields for 'File Name', 'Document Category', 'Subcategory', 'Territory', 'Year', 'Reference', 'Obligation Type', 'Legal Entity', 'Notes', and 'Period'. The 'File Name' field contains 'Gemo document.docx'. The 'Document Category' is set to 'Workpapers and Analysis'. The 'Territory' is set to 'Select Territory'. The 'Year' is set to 'Select Year'. The 'Reference' is set to 'Enter Reference'. The 'Obligation Type' is set to 'Select Obligation Type'. The 'Legal Entity' is set to 'Enter Legal Entity'. The 'Notes' field is set to 'Enter Notes'. The 'Period' is set to 'Select Period'. The dialog box also shows 'File Size: 11.49KB' and an 'Audit History' link.

File Name	Category	Legal Entity	Territory
<input type="checkbox"/> DRAFT BILL.DOCK	Other	Indie's Bakery	Algeria
<input type="checkbox"/> TAX RETURN 2017.DOCK	Other	Indie's Bakery	America
<input type="checkbox"/> TRIAL BALANCE.DOCK	Project Documentation		
<input type="checkbox"/> TAX FIGURES.DOCK	Project Documentation		
<input type="checkbox"/> ENGAGEMENT LE...			
<input type="checkbox"/> FINAL DELIVERA...			
<input type="checkbox"/> DRAFT KTF.DOCK			

## Add Files

Drag and drop selected files or click **choose files** to upload from your desktop.

## Document Details

Once you have selected a file, the document category will default to 'Workpapers and Analysis'. You can change the value and provide more relevant details such as territory, year, reference, obligation type, legal entity, notes and period.

Providing details is not mandatory but will enable you to better organise your documents with groupings.

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 and search documents across an engagement collection



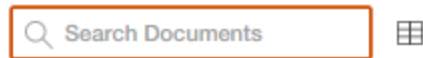
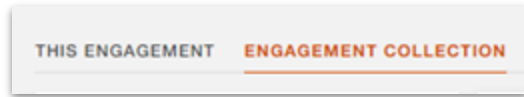
## View documents in an engagement collection

If the engagement is the Parent of an engagement collection, you can opt to view:

- all documents within the single parent engagement; or
- documents across all engagements you can access within a collection.

Use the tabs at the top of Documents in a Parent engagement to switch between viewing documents for the engagement or the engagement collection.

Grouping, search and filters apply within the selected view.



## Search documents

Use the search bar in the top right of the Documents app to locate a document within an engagement or engagement collection.

Search relevant document details associated with the document(s) you need to locate. Documents matched to the search criteria will appear in the documents grid. Some exceptions apply, including:

- Search documents associated with territory by searching the 3-character territory code or using the filter on the Territory column heading
- Document period cannot be searched at this time. Use the filter on the Period column heading to find documents with a specific period noted in the document details.

Search applies to documents within selected groupings and filters. If more than one grouping and / or filter are applied, search results will display documents within the multi-filter view. For example, if you are looking at a group of documents with a specific Category and have applied a territory filter, search will return documents where both the category and territory filters are true.

# Reports



# Reports

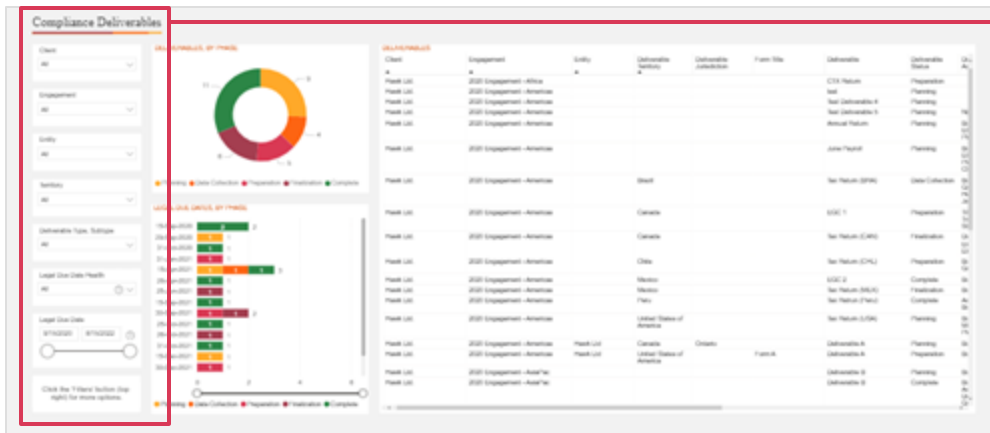


Reports provide powerful visual and interactive insights into your engagement data. They provide aggregated data across your engagements to provide real-time insight into engagement status. Select **Reports** from the engagement menu to access Reports.



## Report List

Different reports will be displayed as tiles. Click View Report to dig into your engagement data.



## Data Slicers

Narrow data by using the data slicers on the left side of the screen.

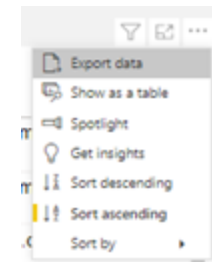
## Filters and Full Screen


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



## Export report data

You can find the Export data 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.





# Additional Settings and Services



# Contacts

You can add key contacts to each Engagement. Add team members to easily access their contact information. Client Managers can add, edit or remove any engagement contacts. Client Contributors can add contacts and edit and remove contacts that they created. Go to Contacts by selecting it on the engagement menu.

Dashboards ▾ Deliverables Data Documents Reports **Contacts**

## Contacts

**+ ADD CONTACT**

**Jane Doe** edit  
Director  
+1 (222) 333-4444  
janedoe@pwc.com

**John Smith** edit  
Sr. Associate  
+4 (333) 222-1111  
john.smith@pwc.com

**John Smith** edit  
Sr. Associate  
+4 (333) 222-1111  
john.smith@pwc.com

**Save** **Delete**

Click **+ Add Contact** to quickly insert new contact information

Click **edit** to change existing contact information or delete an existing contact.

**Edit** contacts directly in the contact card.  
**Save** changes with the disc icon.  
**Delete** an existing contact with the trash icon.

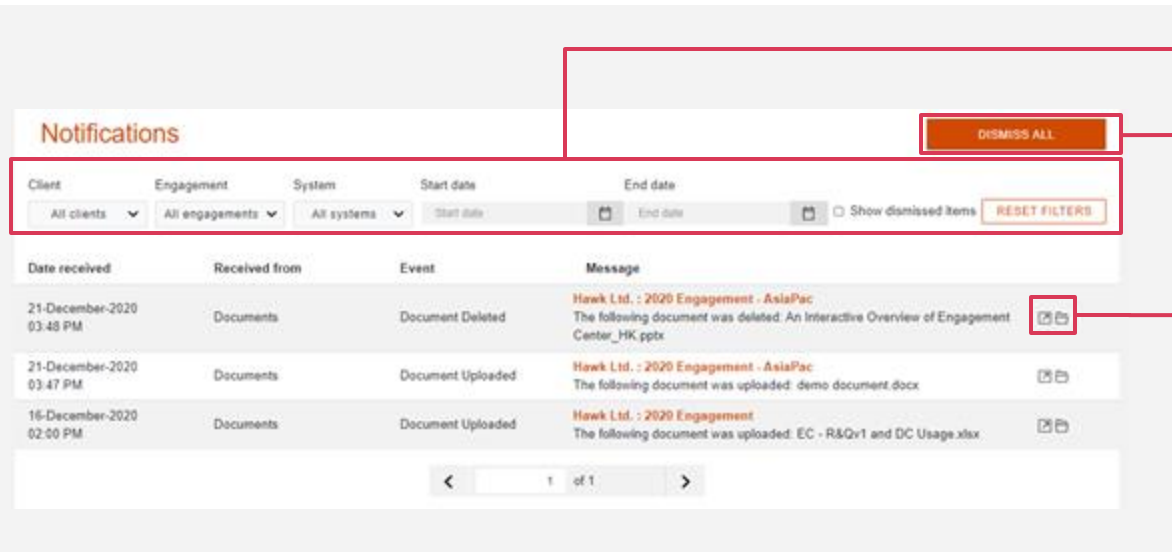
# Notifications

In-platform notifications are available in Sightline.

New notifications appear for PwC and client users as a numerical symbol on the bell icon on the Global Landing Page. 

Notifications will be available in Sightline on an application by application basis. Currently, Sightline Documents is the only application with 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



Date received	Received from	Event	Message
21-December-2020 03:48 PM	Documents	Document Deleted	Hawk Ltd. : 2020 Engagement - AsiaPac The following document was deleted: An Interactive Overview of Engagement Center_HK.pptx
21-December-2020 03:47 PM	Documents	Document Uploaded	Hawk Ltd. : 2020 Engagement - AsiaPac The following document was uploaded: demo document.docx
16-December-2020 02:00 PM	Documents	Document Uploaded	Hawk Ltd. : 2020 Engagement The following document was uploaded: EC - R&Qv1 and DC Usage.xlsx

**Filter** notifications by Client, Engagement, System (application or service) and Date.

**Dismiss Notifications** with the **Dismiss All** button. You can also dismiss a set of filtered Notifications by filtering your Notifications and clicking **Dismiss All**.

**Open the item** associated with a Notification with the arrow icon. 

**Dismiss** a single Notification with the open folder icon. You can reopen dismissed Notifications by selecting **Show Dismissed Items** and clicking the closed folder icon.

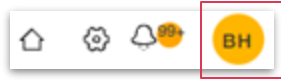




# Email Notifications

Stay up to date with activity in your PwC engagements by receiving daily or weekly **Email Notifications** from Sightline.

**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.

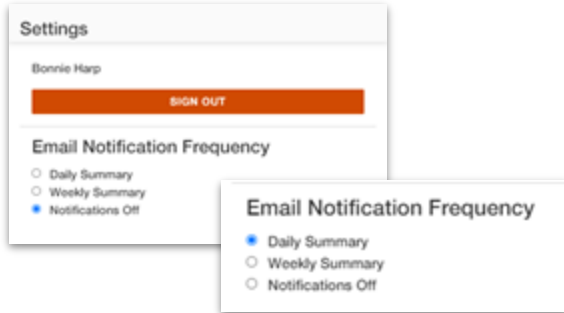


**Notifications Off** will be set by default.

Opt into Email Notifications by selecting to receive a **Daily Summary** or **Weekly Summary** under Email Notification Frequency.

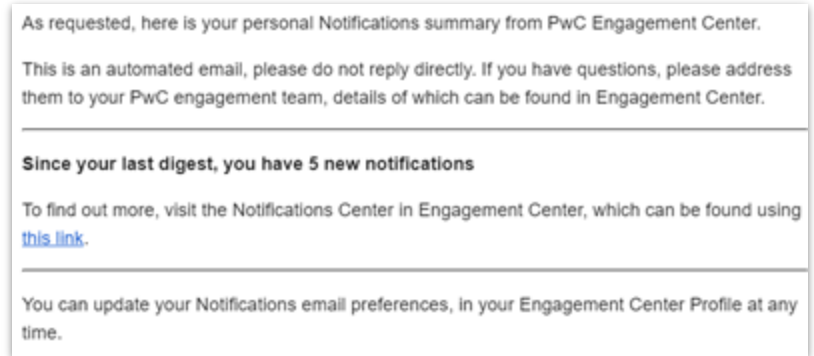
**Daily Summary** will send an Email Notification daily at 12am GMT.

**Weekly Summary** will send an Email Notification weekly on Sunday at 12am GMT.



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

Opt out of Email Notifications anytime by selecting **Notifications Off** under Email Notification Frequency in your User Profile.



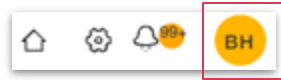
Opt out of Email Notifications anytime by selecting **Notifications Off** under Email Notification Frequency in your User Profile.

# Language Preference



Language translation is available for some languages in Sightline. Change your language preference to Chinese, Japanese or Korean in the User Profile.

**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.

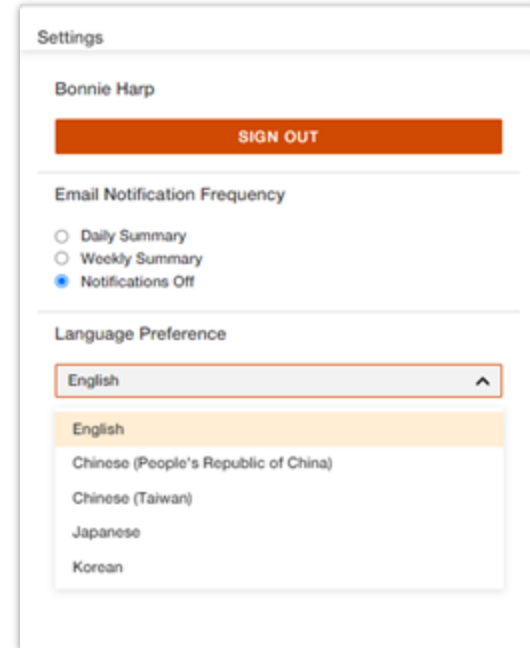


**English** is Sightline's default language.

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

## A note about language translation:

- Sightline may not show completely translated for all languages.
- Applications will be displayed in your preferred language where available.
- Any elements of Sightline that have not been translated will be displayed in English



# Supporting Resources



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## Resource centre

Your one-stop-shop for Sightline user guidance, FAQs, informational videos and more. Access the Resource centre by clicking the orange icon in the bottom corner of the platform.



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## PwC Client Support centre

Visit the [PwC Client Support centre](#) to view the Sightline knowledge base. Here you will find how-to articles, FAQs, videos and support information for Sightline. Log in with your PwC credentials to access the full list of content.

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## PwC Engagement Team

If you have questions about Sightline or are experiencing technical difficulties, reach out to your local PwC Engagement Team for assistance.

# Thank you

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