

Engagement Center Client User Guide

For the upgraded Engagement Center Experience



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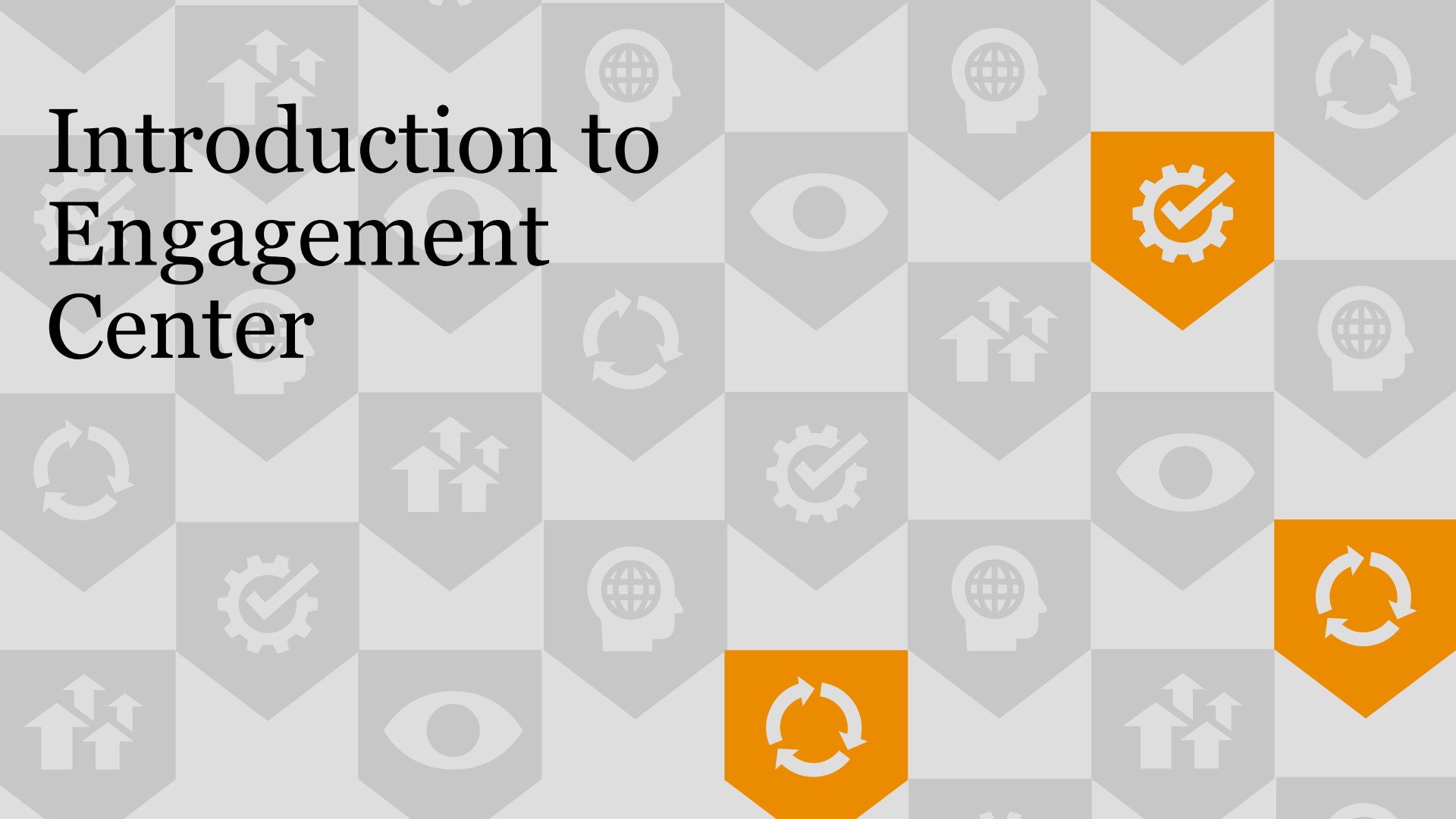
User Management, Contacts, Notifications



Support Resources

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Introduction to Engagement Center



Engagement Center

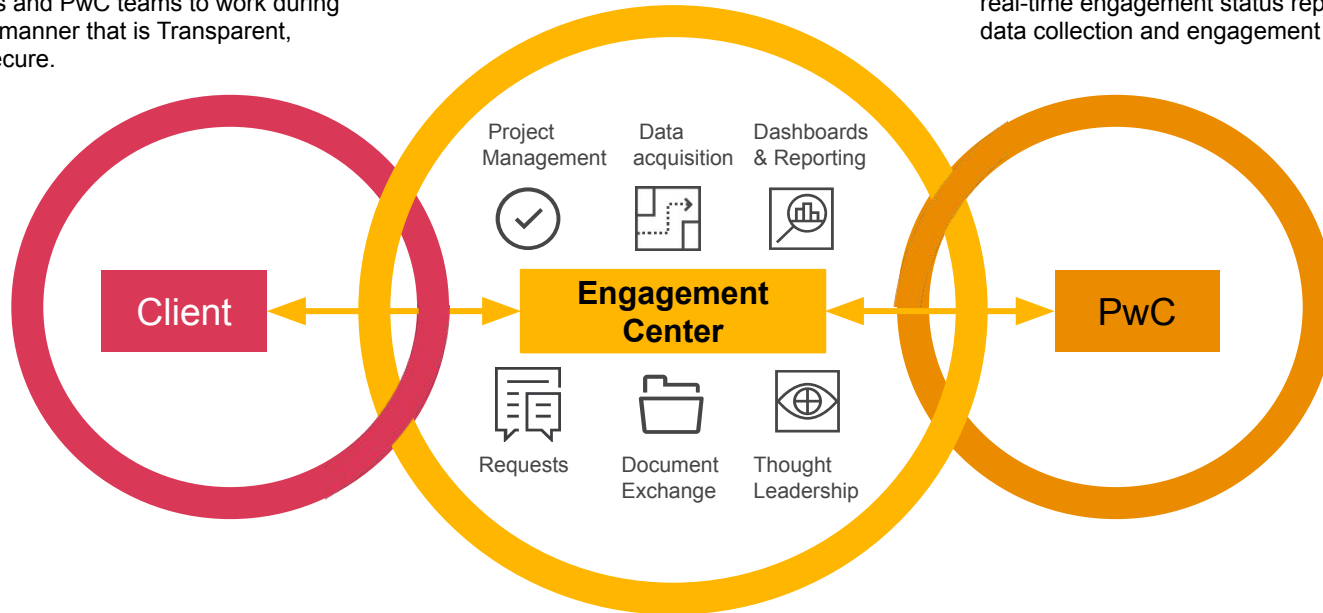
Transparent

Engagement Center facilitates the delivery of engagements at PwC. Engagement Center 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

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



Engagement Center: How It's Organised

Both PwC and client users access Engagement Center through the **Global Landing Page**. From there, they can navigate to Engagement Center 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 Global Landing Page, 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.

Engagement Center

Common services and unified user experience

Cross Functional Services

Documents

File exchange & sharing

Tracker




Deliverable & task management

Requests

Data collection / communication

Dashboards & Reporting

Visualisations and real-time reporting

-  **Core Platform applications** with specific service delivery functions
-  **Engagement Center Host** supports its platform apps and cross-functional services
-  **Cross functional services** like the Global Landing Page and Engagement Dashboard create a cohesive user experience.

Access Engagement Center





Access Engagement Center

Access your engagements in Engagement Center from anywhere in the world. PwC clients and staff can use the URLs below to access Engagement Center – both links will take you to the same place:

- <https://engagementcenter.pwc.com/>
- <https://engagementcentre.pwc.com/>

If your organisation has federated security enabled with PwC, see [slide 10](#) to learn more about your sign-in experience.

PwC Account Activation



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

PwC Account Activation

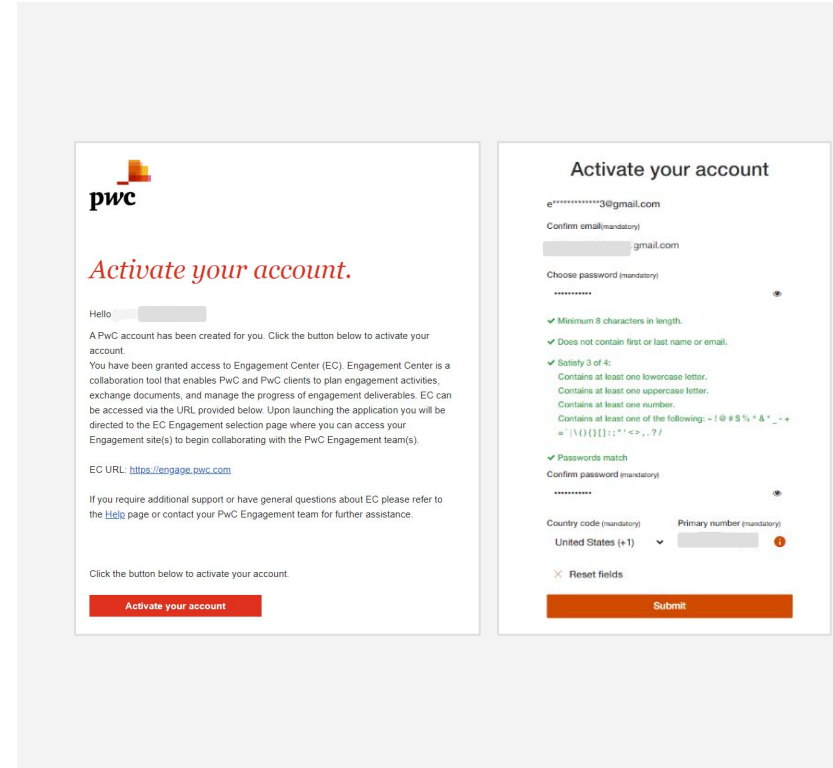
When you are added to a new engagement in Engagement Center, PwC will check if you are verified for PwC application access:

- If you are already verified, use your PwC credentials to log in to Engagement Center.
- 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**.

Verify your identity

To verify your identity, we will send a one-time verification code to your phone.

Choose 1:

Text me at *****197.

Call me at *****197.

If selecting this option, ensure the device can receive text messages.

Send

Assistance required

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**.

One time verification code sent.

Submit

I didn't receive a code

Resend code **Select different method**

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

Password reset

You may need to reset your password for Engagement Center. Changing the password for Engagement Center 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

Submit

Need Help?

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 Engagement Center 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.*

pwc

Reset your PwC account password.

Hello Bonnie Harp,
Click the button below to reset your account password.

Reset your password

Log into Engagement Center



1

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

2

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

3

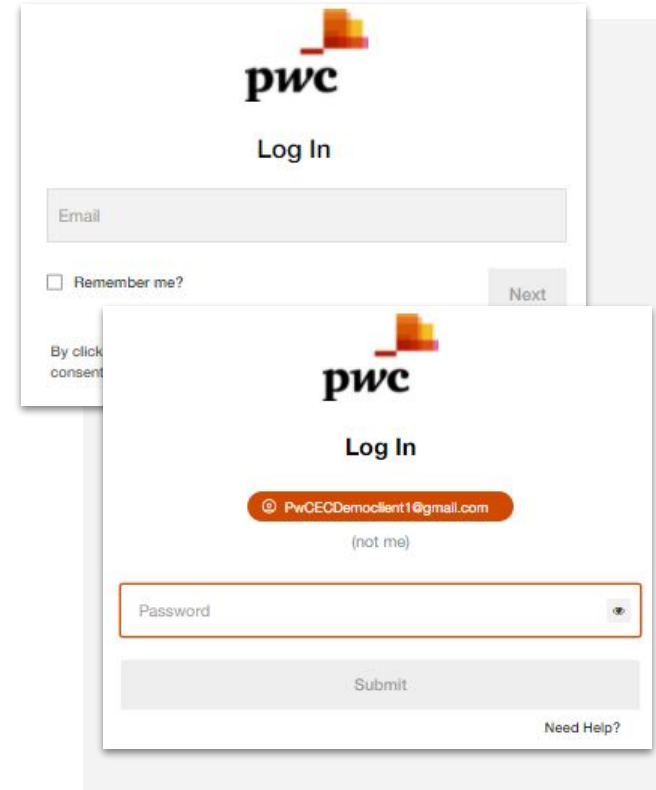
On the next screen enter your Password and click **Log In**.

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.

Federated security

Where your organisation has federated security enabled with PwC (single sign on), after navigating to the Engagement Center 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 Engagement Center 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 Engagement Center.

- 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.

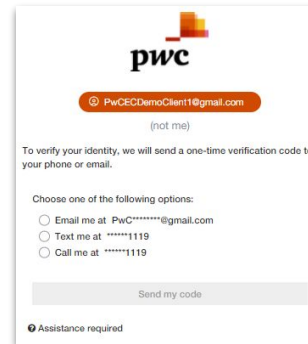
Completing Two-Step Verification

Log in to using PwC credentials



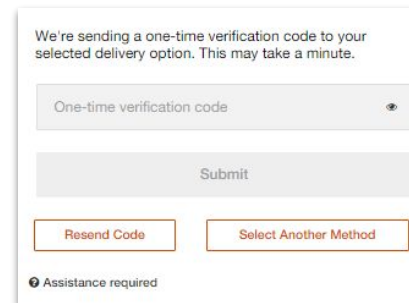
The screenshot shows the PwC login interface. At the top is the PwC logo. Below it is the text "Log In". There is a text input field labeled "Email". Below the input field is a checkbox labeled "Remember me?". To the right of the checkbox is a "Next" button. At the bottom, there is a small disclaimer: "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 screenshot shows the "Select Two-Step Verification method" screen. At the top is the PwC logo. Below it is the email address "PwCECDemoClient1@gmail.com" with "(not me)" underneath. The text reads: "To verify your identity, we will send a one-time verification code to your phone or email." Below this, it says "Choose one of the following options:" followed by three radio button options: "Email me at PwC*****@gmail.com", "Text me at *****1119", and "Call me at *****1119". There is a "Send my code" button. At the bottom, there is a "Assistance required" link.

Enter and submit verification code to gain access to Engagement Center



The screenshot shows the "Enter and submit verification code" screen. The text reads: "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 the "One-time verification code". There is a "Submit" button. Below the submit button are two buttons: "Resend Code" and "Select Another Method". At the bottom, there is a "Assistance required" link.

Engagement Center Roles & Permissions



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

Permissions in Engagement Center vary by application. Below are general descriptions of client roles across the platform. If you need specific permissions within a specific application in Engagement Center, 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 Engagement Center access roles and permissions.

Navigating Engagement Center



My Homepage

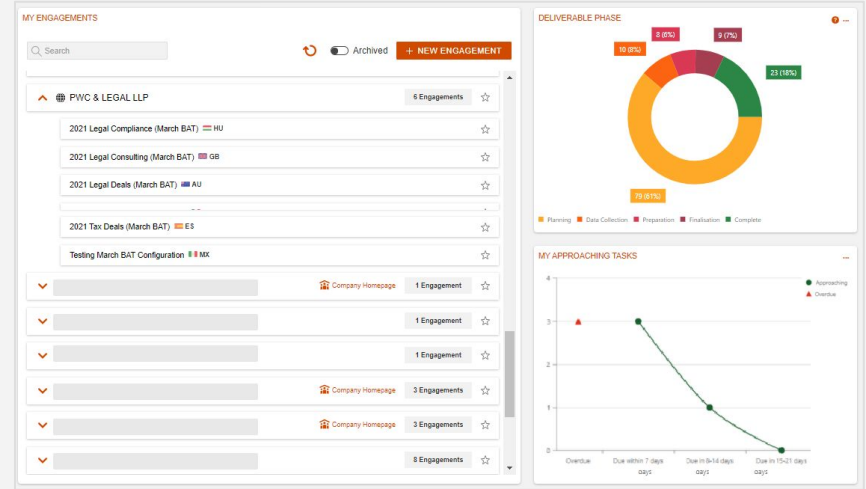
My Homepage is your customised landing page upon logging into Engagement Center. Tailored to your unique Engagement Center experience, My Homepage provides direct access to all of your engagements and visualises their progress in real-time.

Access all engagements that you are a part of from the **My Engagements** list:

- Find engagements quickly by **searching** them by name or client.
- Click the star to **favourite** engagements and clients so that they automatically appear at the top of the list until clicked on again to remove from favourites.
- Click the orange **Company Homepage** icon to view your client's Company Homepage.

The **Deliverable Phase** widget shows a breakdown of your engagement deliverables by phase. Deliverable progress data is sourced from all engagements that you are a part of within our upgraded platform:

- Navigate to **Reports** by clicking the three dots in the top right corner of the widget.
- The **My Approaching Tasks** widget shows your tasks that are overdue or have an approaching deadline. This data is sourced from all engagements that you are a part of within our upgraded platform.

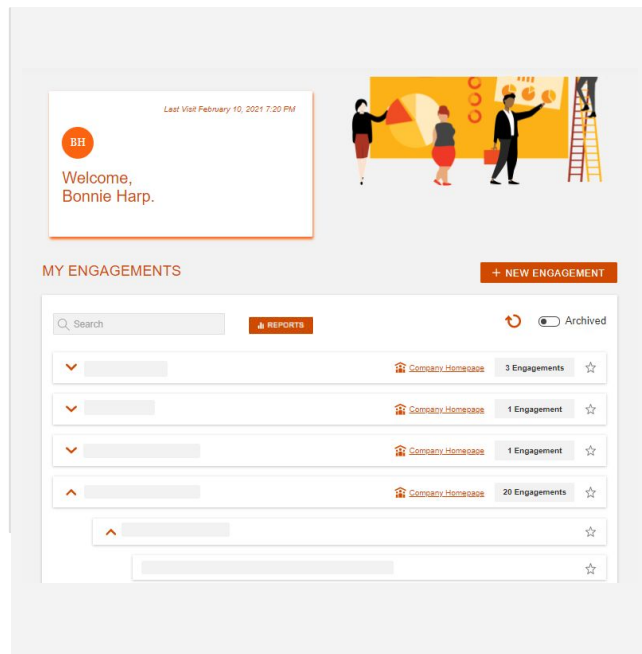


Quick Tip: If you notice engagements are missing from your My Engagements list, refresh your view by clicking the orange icon.

Global Landing Page




Upon launching Engagement Center, 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. If you notice engagements missing from the Global Landing Page, try clicking the orange refresh button.



Engagement Center knows you!

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

My Engagements List

Immediate access to your list of engagements, regardless of LoS or location. Click the  to expand rows and view child Engagements. Click on the Reports button to launch cross client reports connected to engagements that use Tracker.

Search bar

Search your engagements as an easy way to navigate through multiple engagements.

Platform Reporting

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

Company Homepage

Click the icon to visit the Company Homepage for a client.

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.

Refresh Button

If you think your engagements list is missing engagements that you have access to, try clicking the orange refresh icon.

Engagement Types

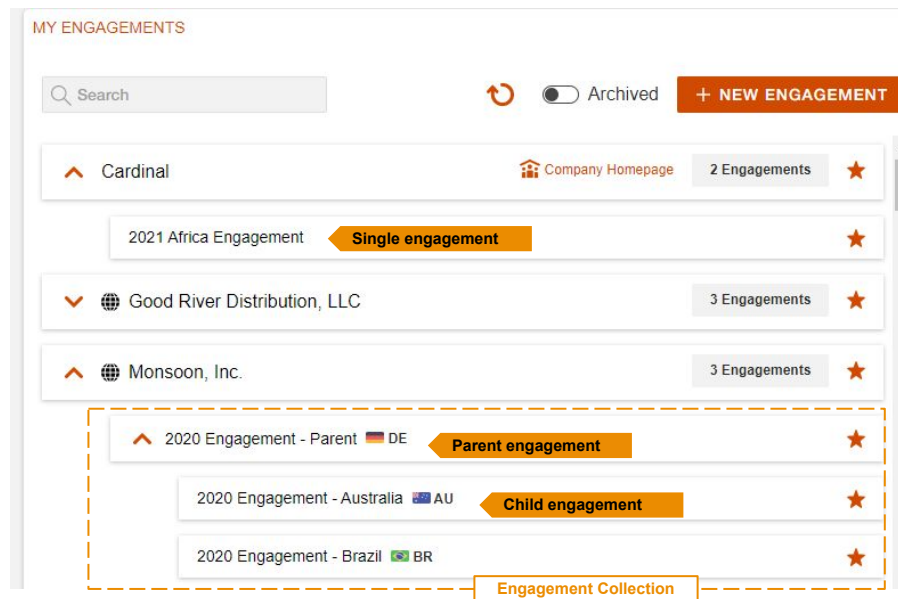
Engagements can either stand alone as an individual engagement or link to a **Parent engagement** to support roll-up reporting as part of an **Engagement Collection**. Engagements linked to a Parent Engagement are called **Child engagements**.

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 Engagement Center 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 Engagement Center.



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.

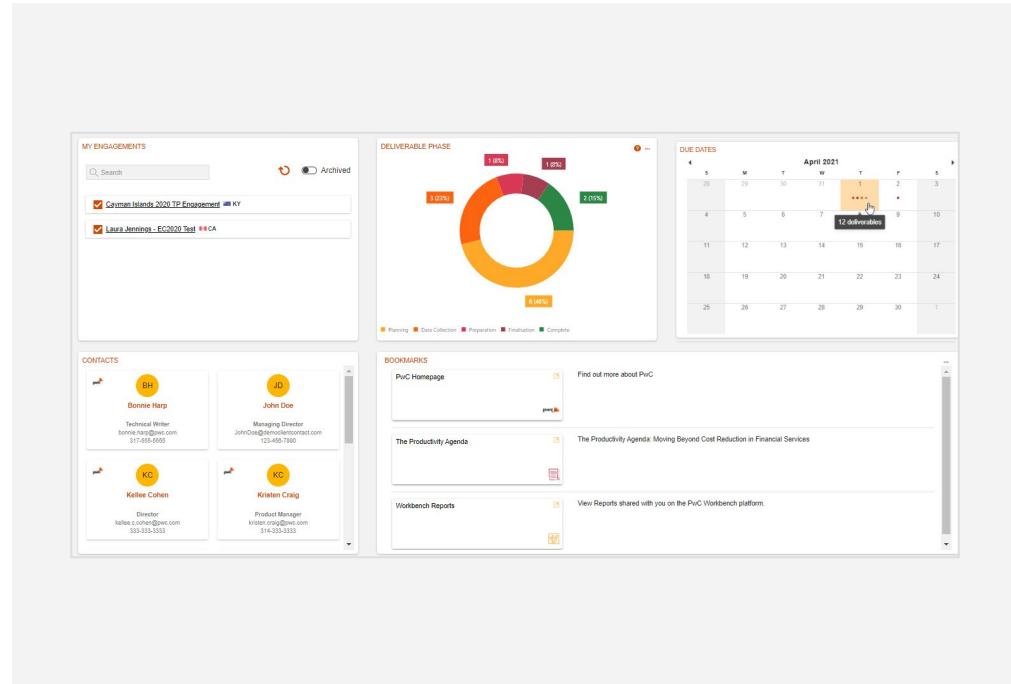
The **Deliverable Phase Widget** provides a breakdown of engagement deliverables and their current phases. If you don't have any deliverables in your engagement, the widget will show you all the phase colors with the legend.

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 Center Core Applications and Services





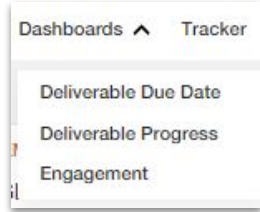
Dashboards

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.

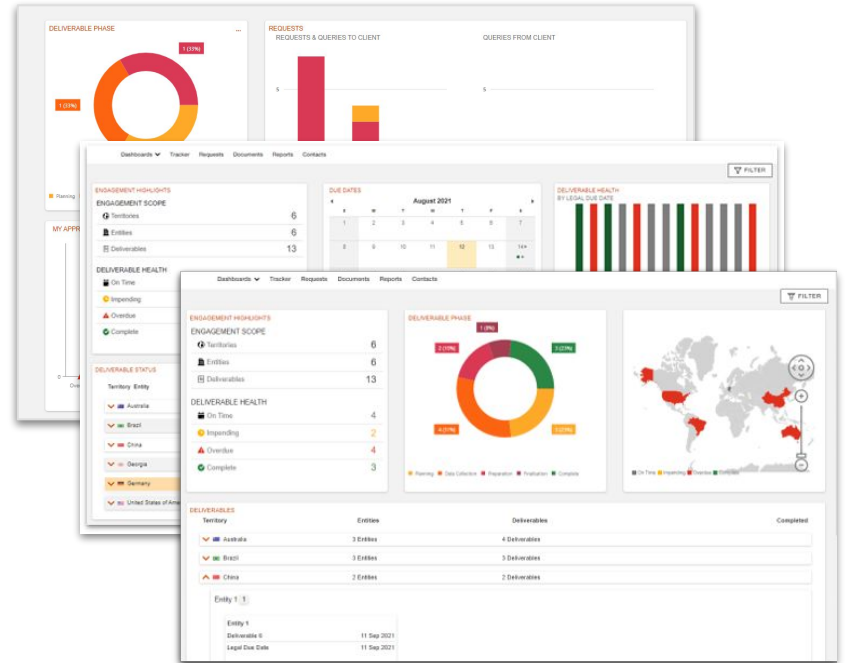
Dashboards will be the first application visited upon entering your engagement:

- 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 My Homepage 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)

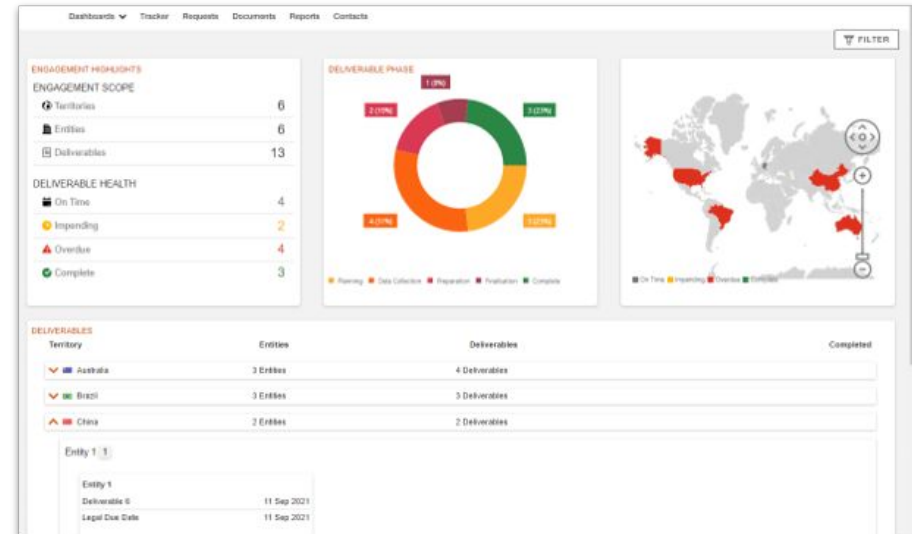
Filter dashboard data by territory by clicking on one or more countries.

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 associated with the territory. Deliverables are grouped by Entity. Click a deliverable card to view its details and navigate to your deliverable in Tracker.

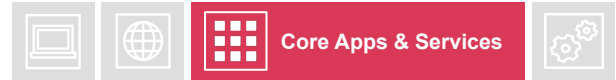
Quick Tip:

Deliverable health is categorised according to the following criteria:

- If the deliverable is in a state of complete it shows **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.

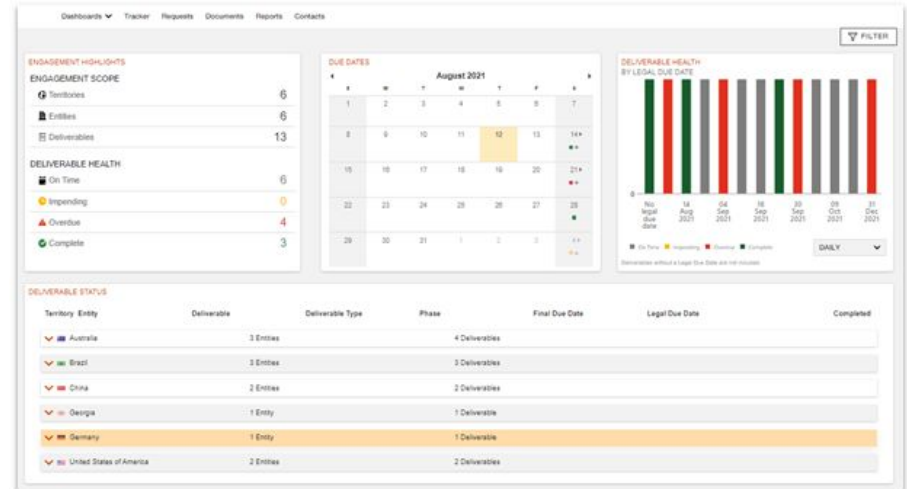
Due Dates is a calendar view of the due dates assigned to deliverables in Tracker:

- 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



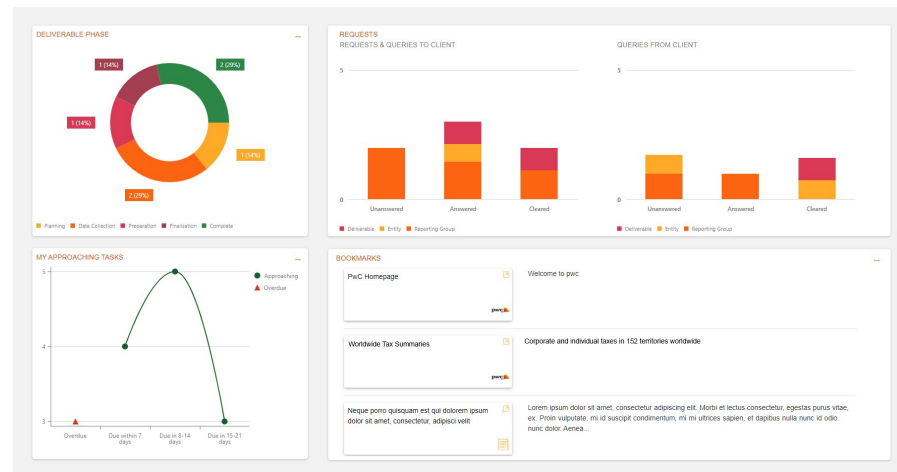
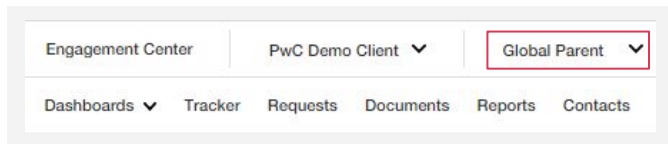
The **Engagement dashboard** is the default view upon visiting a child or single engagement. The Engagement Dashboard contains various summarise PwC engagement data and provides quick links to relevant information.

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

Requests shows the status of engagement information requests and queries.

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

Bookmarks provides quick links to frequently visited sites and applications outside of Engagement Center. 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

Search **REPORTS** Refresh Archived **+ NEW ENGAGEMENT**

PwC Demo Client Company Homepage **10 Engagements** Star

- Global Parent** BE **Parent engagement** Star
- Australia Engagement Site** AU **Child engagement** Star
- Belgium Engagement Site** BE Star
- United Kingdom Engagement Site** GB Star
- United States Engagement Site** US Star
- 2021 Engagement** AU **Single engagement** Star

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.



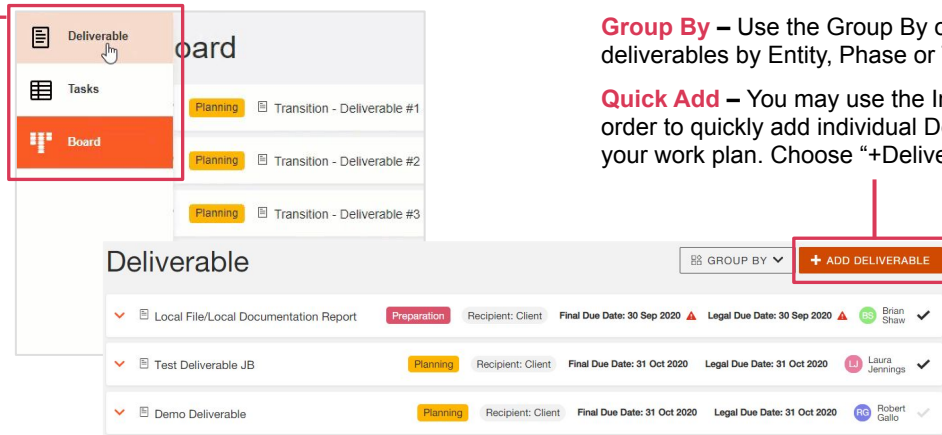
Tracker

Tracker

Tracker is used to manage the workflow for the engagement. Access the Tracker tile from the Engagement Home Page. Let's take a look at what workflow management looks like with Tracker.

Views

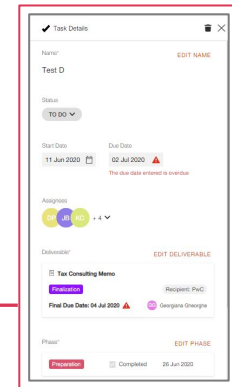
- **Deliverable:** See a list of engagement Deliverables and an overview of their progress. This view tracks the four phases of the deliverable lifecycle (Planning, Data Collection, Preparation, Finalisation).
- **Task:** See a detailed view of your engagement activities. View and modify Task and Subtask 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

Quick Add – You may use the Individual Quick Add tool in order to quickly add individual Deliverables and Tasks to your work plan. Choose “+Deliverable” or “+Task”.

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

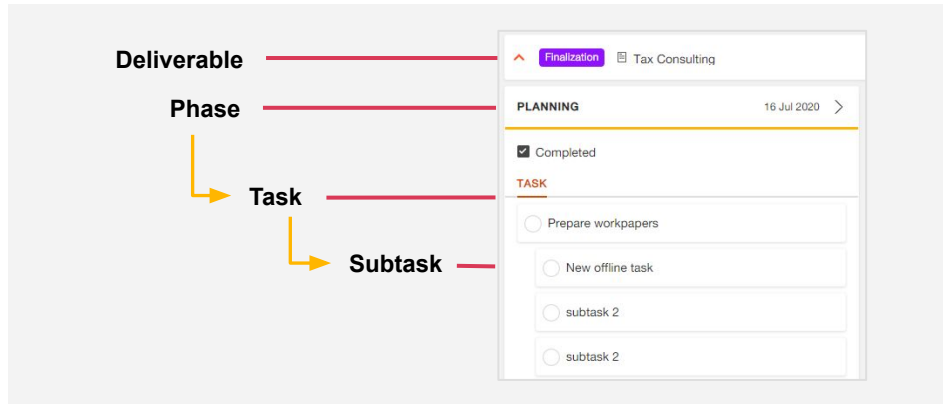


In order to facilitate aggregated or 'roll up' reporting, Deliverables are divided into Phases. Each Phase can be assigned Tasks within a Deliverable. These Tasks can be broken into Subtasks. Follow the steps below to add items.

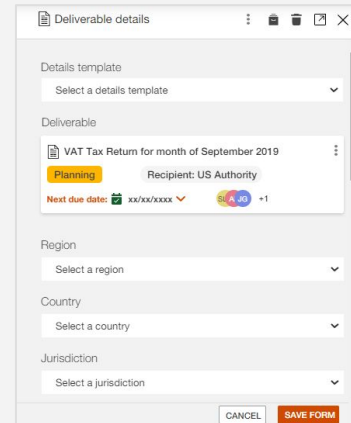
Create items

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.

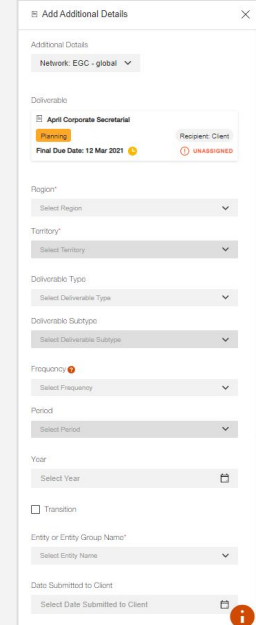


Add additional details in the Deliverable slide out. These fields transform the standard Deliverable into a specific type, allowing you to associate key pieces of information based on the type of work PwC is producing.




The 'Deliverable details' slide out form includes the following fields:

- Details template: Select a details template
- Deliverable: VAT Tax Return for month of September 2019
- Next due date: xx/xx/xxxx
- Region: Select a region
- Country: Select a country
- Jurisdiction: Select a jurisdiction
- Buttons: CANCEL, SAVE FORM



The 'Add Additional Details' slide out form includes the following fields:

- Additional Details: Network: EGG - global
- Deliverable: April Corporate Secretariat
- Final Due Date: 12 Mar 2021
- Region*: Select Region
- Territory*: Select Territory
- Deliverable Type: Select Deliverable Type
- Deliverable Subtype: Select Deliverable Subtype
- Frequency: Select Frequency
- Period: Select Period
- Year: Select Year
- Transition:
- Entity or Entity Group Name*: Select Entity Name
- Date Submitted to Client: Select Date Submitted to Client
- Info icon: 

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.

Deliverable slide out

Phase slide out

Task slide out

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**.

A slide out header for "External Hyperlink" with a text input field containing "External Hyperlink" and an orange button labeled "ADD HYPERLINK".

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

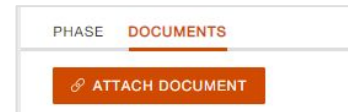
A slide out form for "External Hyperlink" with a "CANCEL" button and an "ADD HYPERLINK" button. It contains two input fields: "Name*" with the value "Demo hyperlink - LinkedIn" and "URL*" with the value "https://www.linkedin.com/".

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

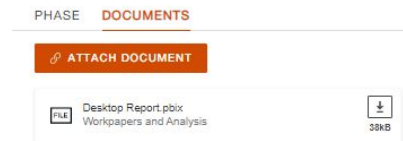
Attach documents from the Engagement Center Documents picker to your Deliverable, Task or Subtask:

- 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

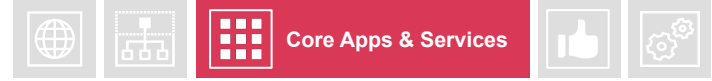
Download documents attached to your Deliverable, Task or Subtask by clicking the icon next to the document in the slide out footer.





Requests

Requests notification settings



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.

Notifications

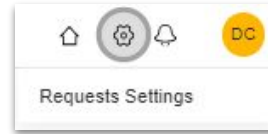
Subscribe to email notifications to receive alerts about activity happening in Requests. To access notification settings, click the cog wheel icon in the top right corner and select **Notification Settings**.

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.



Requests Settings Requests Version - 2.6 (20220121.4)

NOTIFICATIONS

There are a number of notification settings you can choose in Engagement Center - Requests & Queries.

Frequency of email notifications

Notifications off
 Instant notifications
 Daily summary
 Weekly summary

I would like to receive Requests & Queries notifications for...

All user activity for all engagements
 Responses to my activity for all engagements
 All user activity for engagements I select

Check the box to subscribe

Client	Engagement
<input checked="" type="checkbox"/> Globe ABC	Tax Engagement
<input type="checkbox"/> Globe XYZ	Tax Engagement

< 1 of 1 >

Requests overview

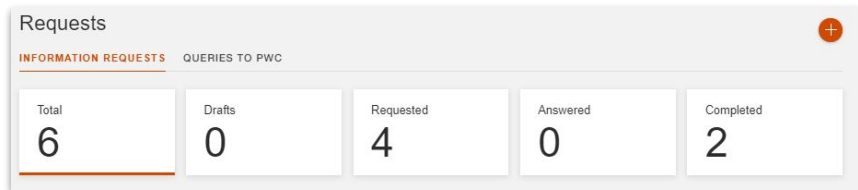


The Requests app allows you to communicate with your PwC team directly within Engagement Center, providing many benefits:

- 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.



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.

Click a status card to filter items by status.

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

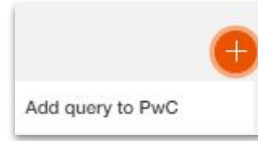
Requests will centralise all communication throughout your engagement. Raise a query with your PwC team in Requests by completing the following fields in the *Add query to PwC* slide out:

- 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.

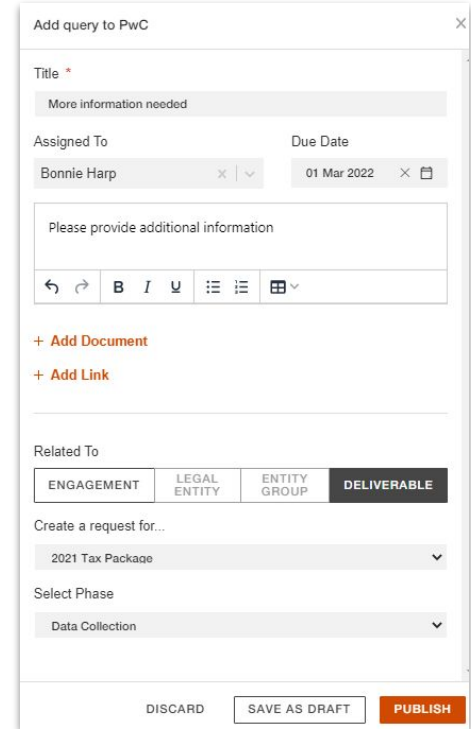
Discard your query if it is no longer needed. It will not be saved.



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:

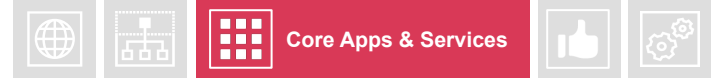
- *PIR* - indicates Information Request
- *PQ* - indicates Query



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 undo, redo, bold, italic, underline, list, and link icons.
- + Add Document**
- + Add Link**
- Related To**: Filter tabs for ENGAGEMENT, LEGAL ENTITY, ENTITY GROUP, and DELIVERABLE (selected).
- Create a request for...**: 2021 Tax Package
- Select Phase**: Data Collection
- Buttons**: DISCARD, SAVE AS DRAFT, PUBLISH

Format queries

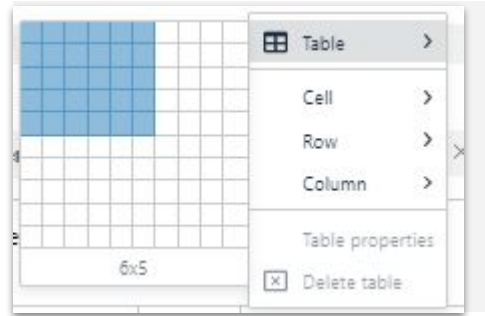


Use the formatting menu within a draft query to format text and insert basic tables.

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.

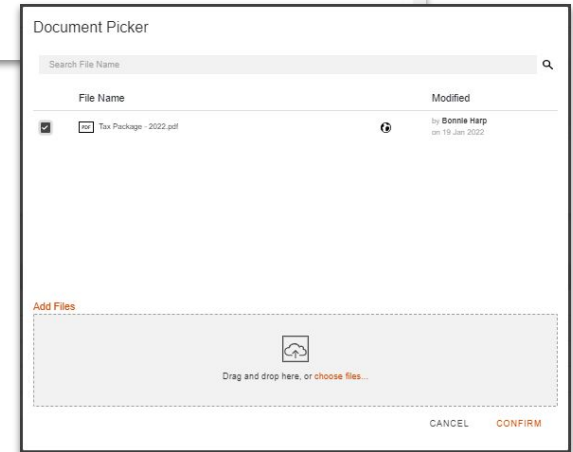
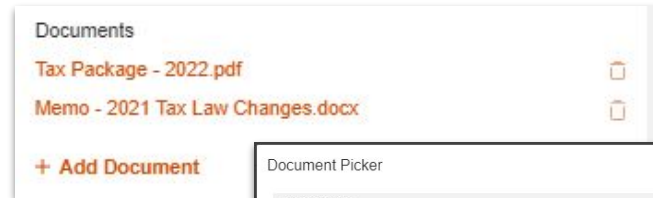


Attach an existing file from your engagement

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.



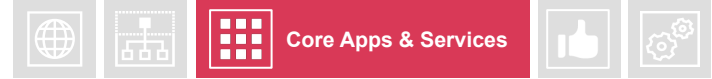
Attachments	Due Date ▾	Status ⓘ
Tax Package - 2022.pdf		Answered

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

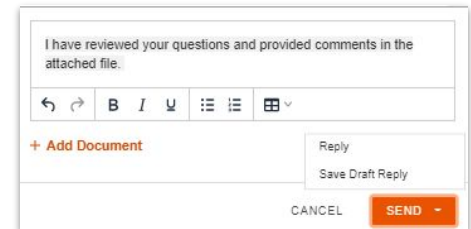
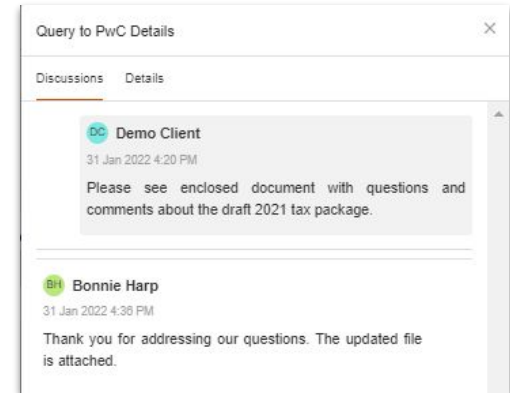
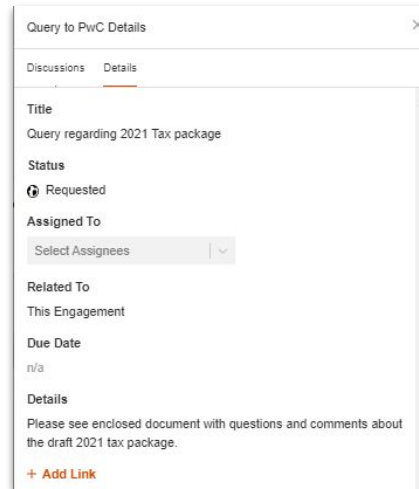
Click the clipboard icon at the end of an item row to open the **Information Request or Query Details** slide out.

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

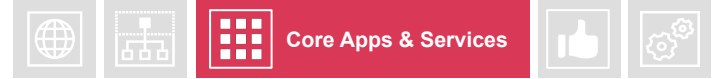
Discussions

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

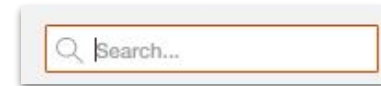
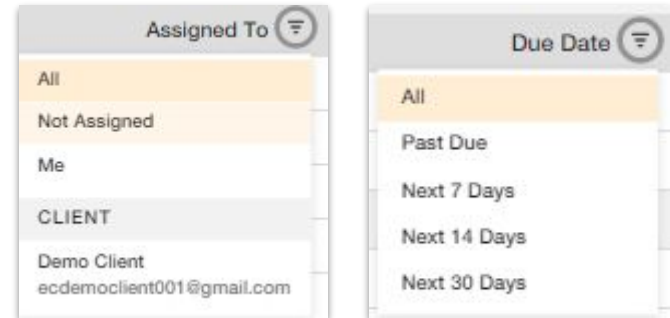
Use the search bar to search items in Requests. Requests will search items within the tab selected at the top of Requests (Information Requests, Queries to PwC). Search by the following criteria:

- 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.

Total	Drafts	Requested	Answered	Completed
9	3	4	0	2

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

Exchanging and collaborating on documents is one of Engagement Center'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.

Grouping documents

In order to have 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.

Adding 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

The screenshot shows the 'DOCUMENTS' page with a table of documents. Annotations highlight four key features:

- Groupings:** A box labeled 'Display Options' contains a 'Groupings' section with the instruction 'Drag column headings here to group documents'.
- Actions:** A box labeled 'Actions' contains the instruction 'Select one or more documents to perform actions'.
- Add Files:** A box labeled 'Add Files' contains an upload icon and the instruction 'Drag and drop here, or choose files...'.
- Columns:** A box labeled 'COLUMNS' contains a list of columns with checkboxes: Category (checked), Subcategory, Obligation Type (checked), Period, Reference, Notes, Year, Legal Entity (checked), Territory (checked), Created, Published, Modified (checked), and Uploaded.

<input type="checkbox"/>	File Name	Category	Legal Entity	Territory	Published	Modified
<input type="checkbox"/>	LARGEFILETEST4.TXT	Project Documentation			12 Mar 2021 16:5	
<input type="checkbox"/>	TESTING FILE 2.TXT	Legal Documentation			12 Mar 2021 16:5	
<input type="checkbox"/>	TESTING FILE 3.TXT	Analysis			12 Mar 2021 16:5	
<input type="checkbox"/>	TESTING FILE.TXT	Other			12 Mar 2021 16:5	
<input type="checkbox"/>	TESTING FILE 1.TXT	Research			12 Mar 2021 16:5	

Add Documents



Dashboard Documents Contacts Tracker Reports Requests

Display Options

Groupings

Drag column headings here to group documents

Actions

Select one or more documents to perform actions

Add Files

Drag and drop here, or choose files...

DOCUMENTS

<input type="checkbox"/>	File Name	Category	Legal Entity	Territory
<input type="checkbox"/>	DRAFT BILL.DOCX	Other	Indie's Barkery	Algeria
<input type="checkbox"/>	TAX RETURN 2017.DOCX	Other	Indie's Barkery	America
<input type="checkbox"/>	TRIAL BALANCE.DOCX			
<input type="checkbox"/>	TAX FIGURES.DOCX			
<input type="checkbox"/>	ENGAGEMENT LETTER.DOCX			
<input type="checkbox"/>	FINAL DELIVERABLE.DOCX			
<input type="checkbox"/>	DRAFT KTD.DOCX			

Add Document Details (1 / 1)

File Name
demo document.docx

Document Category *
Workpapers and Analysis

Subcategory
Select Subcategory

Territory
Select Territory

Legal Entity
Enter Legal Entity

Year
Select Year

Notes
Enter Notes

Reference
Enter Reference

Period
Select Period

Obligation Type
Select Obligation Type

SAVE CANCEL

File Size: 11.49KB

▼ Audit History

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.

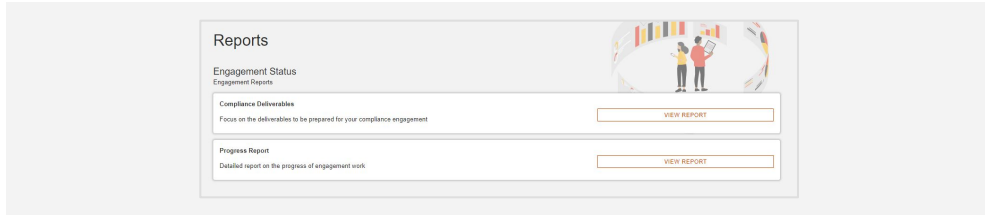
In case of multiple files, add them to a zip folder to upload them all at once. You can apply document details to all documents within the zip folder by selecting **apply to all documents**.



Reports

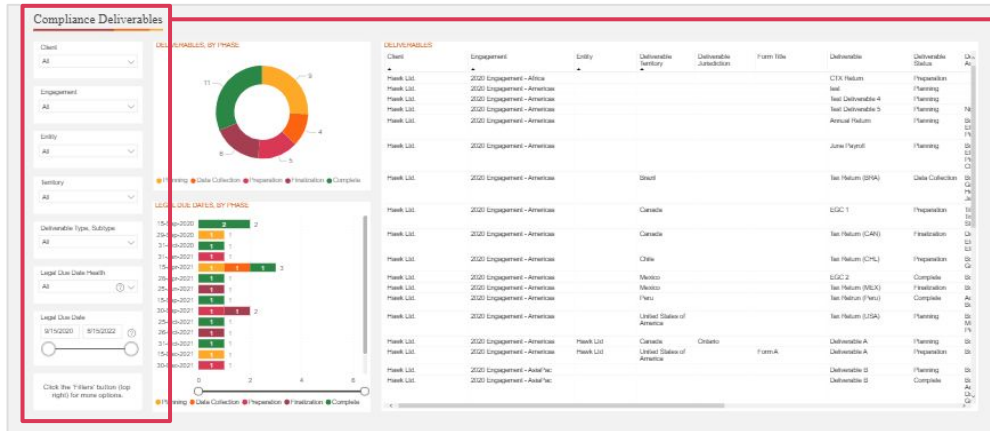
Reports

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.



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.

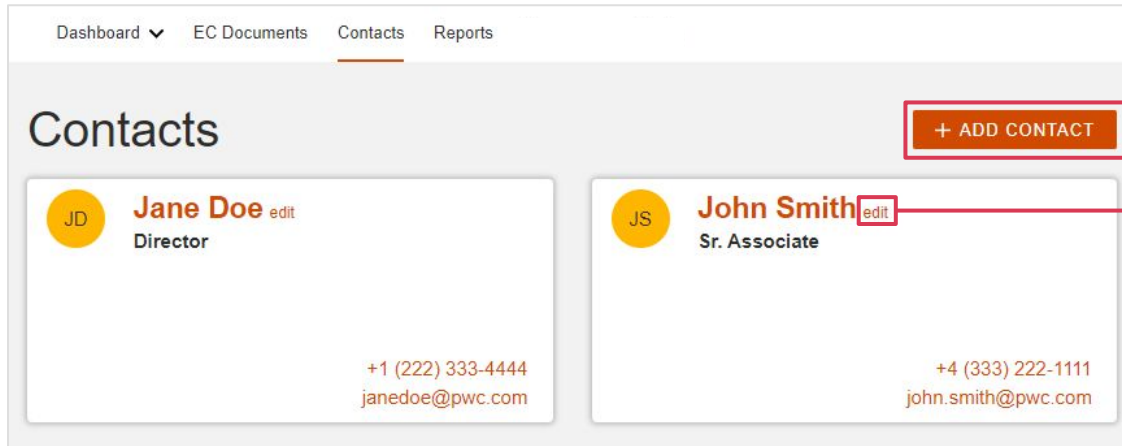


Additional Settings and Services



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.



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 Engagement Center.

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 Engagement Center on an application by application basis. Currently, Engagement Center 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

Notifications

DISMISS ALL

Client Engagement System Start date End date

All clients All engagements All systems Start date End date Show dismissed items **RESET FILTERS**

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	

< 1 of 1 >

Show dismissed items

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 Engagement Center.

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 Engagement Center.

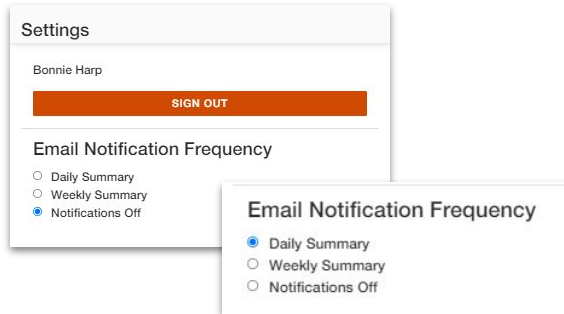


Notifications Off will be set by default.

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

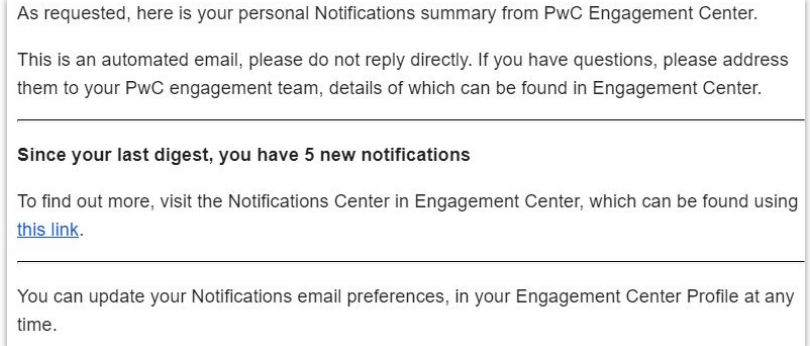
Daily Summary will send an Email Notification daily at 12am GMT.

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



An **PwC Engagement Center Digest** email will be sent to the email address associated with your Engagement Center 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.

Supporting Resources



Resource Center

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



PwC Engagement Team

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

www.pwc.com

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