

Connect v3

User Guide for Clients



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Connect v3 key features



Our latest version of Connect streamlines, standardizes and automates real-time communication and workflow between your team and your PwC Engagement team. It provides fast, efficient and secure information-sharing at every stage of the engagement—reducing or eliminating the need for email.

What are the key features?

- **Dashboards** enable real time monitoring of progress—helping you see what is coming due and when ([page 2](#))
- The **calendar view** displays all requests and engagement matters to which an individual has access ([page 4](#))
- The **Help** function houses a 'how to' video and User Guide for PwC Clients and Third Parties ([page 4](#))
- **Client review workflow** (optional) allows you to approve request details (i.e. due dates and assignments) before it's requested ([page 6](#)).
- **Assign requests functionality** allows the assignment of up to 6 users to a request ([page 7](#))
- **Uploading documents** includes the ability to drag and drop documents directly onto the request within the Requests view ([page 9](#)). **Large file upload** allows users to upload files larger than 250MB. If enabled, files larger than 250MB will be stored in the Microsoft Azure Cloud. Discuss this functionality with your local engagement team.
- **Discussions** allow you and your PwC Engagement Team to communicate directly within a request to ask questions or draw attention to information - keeping everyone out of email ([page 11](#))
- The **Engagement Matters** module (optional, [page 15](#)) provides greater transparency around coordination, communication and resolution of issues (such as, evaluation of adjustments). Discuss this functionality with your local engagement team.
- The **Milestones** module (optional, [page 16](#)) allows engagement teams to track and share the status of key dates and project deadlines.
- **Global metrics** can display the current request status and performance indicators for progress made on requests across all teams for the global engagement ([page 17](#))

New in 2019!

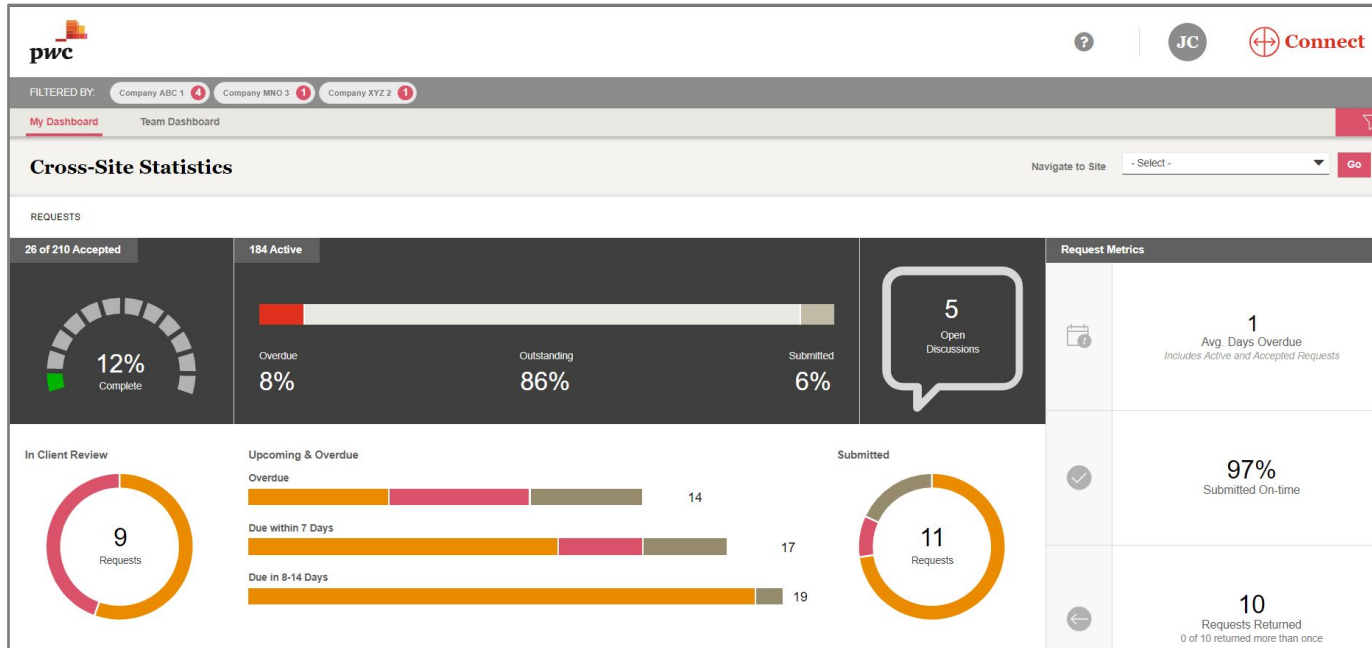
- **My Day** helps with the prioritization of tasks that require attention based on their due date ([page 3](#))
- **Updated requests view** makes navigation within the site seamless and provide you with all information needed ([page 4](#))
- **Related requests** provides visibility to all requests that are associated with one another ([page 8](#))
- **Discussions dashboard** allow you to view all discussions between you and your PwC Engagement Team in one place ([page 12](#))
- **Client request manager role** can create and manage all of the requests in the site ([page 13](#))
- **Digital Library** allows PwC to share links and or documents with you, unassociated with a request, such as accounting guidance and thought leadership ([page 14](#))

Cross-Site dashboard (your landing page)



Select **My Dashboard** to view requests directly assigned to you across all sites or **Team Dashboard** to view requests to which you have access

Select **Site Filter** to filter the dashboard for specific Connect sites or specific engagements.



To navigate to a specific site, select site from the dropdown and click **Go**

Request **Metrics** display real-time KPIs

Click interactive tiles to view prioritized requests to see what you need to do next

Average Days Overdue: Sum of days overdue for requests in 'In Client Review', 'Requested', 'In Progress', 'Returned', 'Submitted', or 'Accepted' that are past their due date (overdue) divided by the total number of all requests past their due date (overdue).

% of Requests submitted on time: Total number of requests 'Submitted' or 'Accepted' that are not past the due date (overdue) as a percentage of total number of requests that have been 'Submitted' or 'Accepted'

of Requests returned more than once: Total number of requests where returned count exceeds one



Keeping your priorities in order has never been easier!

My Day is a view that prioritizes tasks that require action

- Activities are categorized in My Day as:
 - Overdue
 - Due Today
 - Due in Next 7 days
- The My Day icon will be a rose colour if there are Activities to complete and grey if there are none
- Discussions pending response will display under "Open Discussions"

How do I complete an activity in My Day?

1. Click on the My Day icon in the top right corner
2. Click on the activity card to navigate to the task
3. Complete the required action (respond to the discussion, submit the request etc.)



My Day

Welcome to the My Day feature!
All of your tasks that are Overdue, Due Today and Due in the Next 7 Days will appear here. [Dismiss](#)

Open Discussions **1**

RESPOND TO REQUEST DISCUSSION

Significant reconciling items

Last comment by: Leslie V Walker 11 Minute(s) ago

Overdue

Due Today **5**

SUBMIT REQUEST

2002 - Lead schedules - consolidated

Business Day(s) Remaining

SUBMIT REQUEST

2006 - Reconciliation between trial balance and sub-ledgers

Business Day(s) Remaining

SUBMIT REQUEST

2007 - Disclosure checklist

Business Day(s) Remaining



Navigating requests view

Updated 2019!



NEW Show details or hide to show more requests on the grid

Calendar shows upcoming requests and custom entries

Notifications show new requests, discussion activities or updates

Select **Help** to access 'how to' video and User Guide

Select your initials to access **User preferences** to manage email notifications

NEW Select the **My Day** icon to access the My Day panel (Refer to **page 3**)

The screenshot shows the 'Requests' view in the Connect application. The top navigation bar includes the 'Connect' logo and 'Company ABC 1'. Below it, a secondary navigation bar has tabs for 'Requests', 'Engagement Matters', 'Discussions', 'Calendar', and 'Team Directory'. The main content area shows a list of requests with columns for Request, Status, Due Date, Submitted Date, Accepted Date, Request Owners, Requestees, Response Documents, and Open Discussions. A filter bar at the top of the list shows 'Filtered by: Interim' and 'Show Accepted' checked. A 'Show Details' button is also visible.

Select **Engagement Filter** to include or exclude engagements from view.

NEW Related requests lists all associated requests (Refer to **page 8**)

NEW Discussions dashboard shows all discussions in one place (Refer to **page 12**)

Click **request title** or **double click on row** to see request details

Team directory lists PwC user and Client user contact information

Navigating requests view (Continued)

Updated 2019!



Select **Show accepted** to see accepted requests (will not display in default view)

Drag and drop response document(s) directly onto a request

Follow a request with in-site notifications or email when activity occurs (optional)

Acknowledge In Client Review requests

Submit requests

Download a zip file of request templates or response documents (without additional security restrictions)

Create requests - CRM role only (Refer to page 13)

Export with details to Excel

Restrict access to PwC administrators, request owners, and requestees assigned to the request can view

***NEW* Enhanced filters** - Apply filter on columns, pink dot indicates a filter has been applied

Click to show or hide columns

Restrict request reassignment prevents modifying request assignments

Restrict response document download prevents opening or downloading response files uploaded by other users

Request workflow and status



In Client Review *optional workflow

PwC user assigns all or specific request(s) with the status “In Client Review”.

What do I do? Review the request, (i.e. due date, assigned requestees or clarity of information) select “Request Changes” or “Acknowledge”. Acknowledged requests move to “Requested” status or “Request Changes” are updated by PwC users, prior to “Requested” status.

Requested

Your team receives a request for response documents.

What do I do? Review the request, upload response documents and submit. If a request is not ready to be submitted, save and select “Mark as In Progress”.

In Progress

Your team is working on the request.

What do I do? Complete and submit the request.

Submitted

Response documents are uploaded to the request, and the request moves to PwC users for review and acceptance.

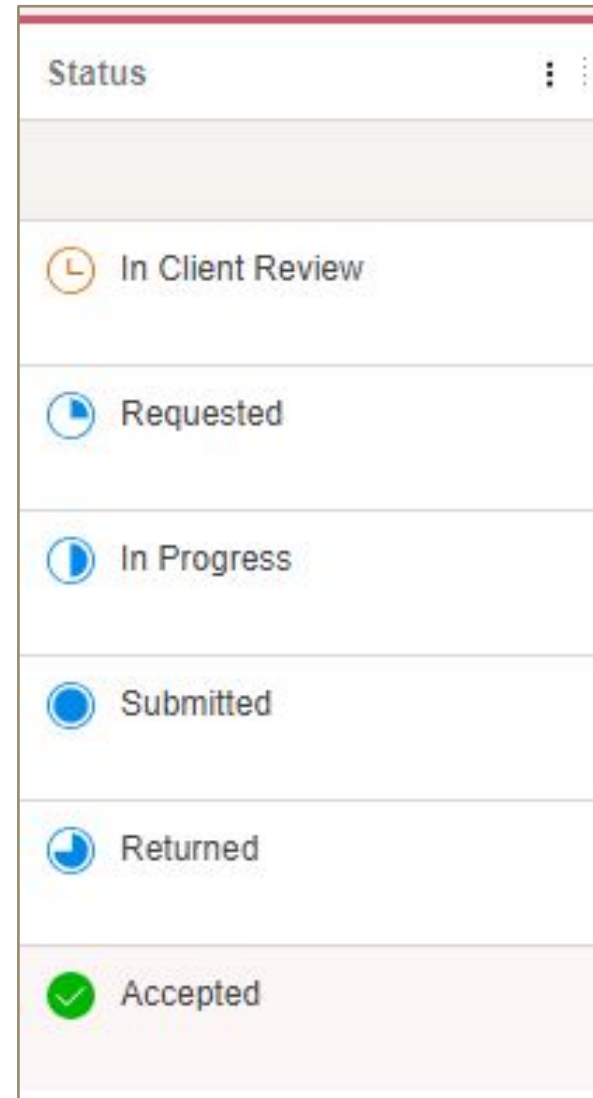
Returned

Before accepting, PwC users may return the request for updates. Once a request has been returned by PwC users or recalled by you, it will remain ‘Returned’ until re-submitted.

What do I do? Review the discussion within the request, update the request, as applicable, and re-submit the request.


Accepted

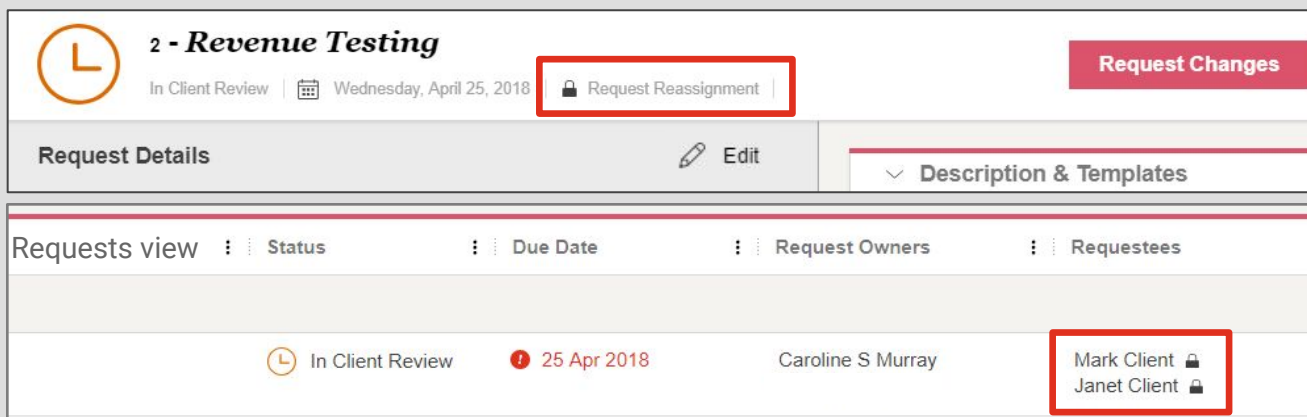
Accepted requests have been reviewed by PwC users and are complete.



Reassigning requests




You can reassign requests to members of your team if a PwC user has not 'Accepted'. If there is a lock icon  a PwC user has 'Restricted Reassignment' (see [page 5](#)). The lock icon will appear in the request header and on the Requests view in the Requestees column of the request.




The screenshot shows a request header for '2 - Revenue Testing' in 'In Client Review' status, dated Wednesday, April 25, 2018. A red box highlights the 'Request Reassignment' button. Below the header is a 'Request Details' section with an 'Edit' button. The main area is a table with columns: Requests view, Status, Due Date, Request Owners, and Requestees. A row shows the request is 'In Client Review' with a due date of '25 Apr 2018', owned by 'Caroline S Murray'. A red box highlights the 'Requestees' column, which lists 'Mark Client' and 'Janet Client', both with lock icons.

If request reassignment is not restricted, follow these steps to reassign requests to other members of your team

1. Select  the **Request details** view
2. Scroll down to Requestees section
3. Select the dropdown arrow next to **primary** or the **secondary requestees**
4. Select the individual to be added
5. Select **Save**

Did you know?

Up to 6 users can be assigned to a request




The screenshot shows the 'Requestees' section of the interface. It has a 'Primary Requestee' dropdown menu with 'Mary Client' selected. Below it is a 'Secondary Requestees (Optional)' section with five dropdown menus, each currently showing '- Select -'.

Related requests

New 2019!



Requests that are related can be linked to provide a quick visual status of all dependencies.

Requests will have the  icon next to the request name in the request view when it has related requests linked to it.

17 - PPE rollforward 

 Accepted


31 Jul 2019

How do I view the related requests?

1. Navigate to the request view (above)
2. Open the request
3. Click on the 'Related Requests' tab

Did you know?

- Only PwC users can add and manage a related request

 **17 - PPE rollforward** Accepted 31 Jul 2019 Not following Recall

Request Details

Engagement
Year End

Request ID
17

Request Title
PPE rollforward

Due Date
31 Jul 2019



Project
Canada

Description & Templates

No description & templates to display.

Response Documents Discussions **Related Requests** History

Requests In Sequence

Request	Status	Due Date	Primary Owner	Primary Requestee
19 - Support for Disposals	 Accepted	08 Aug 2019	Allison McGreevy	Erin Sheehan
18 - Support for...	 Requested	08 Aug 2019	Allison McGreevy	Erin Sheehan

Uploading response documents



There are two easy ways to upload response documents:

- (1) Drag and drop files into the row of the request on the requests view
- (2) Open the request and drag and drop into the 'Response documents' tab or upload the file

Drag & drop on requests view

From the requests view, you can:

1. Select the response document(s) for the specific request from your desktop or windows folder
2. Drag & Drop file(s) into the row of the desired request on the Requests view (this will highlight pink when you hover over it)
3. Open the request to add an optional description or start a discussion

Project	Request	Status	Due Date	Request Owners	Requestees
Uniform Guidance FY19	9 - Cash Management Selections	Requested	01 Sep 2019	Erin Sheehan	Test Rymysza
Core Interim 2019	10 - Investment Policy	Requested	02 Sep 2019	Clair O Merchant	Erin Sheehan
Core Planning 2019	11 - Unassigned Reserves Narrative	Requested	03 Sep 2019	Erin Sheehan	Caroline Murray
Core Planning 2019	12 - Meeting with Mary	Client Review	04 Sep 2019	Allison McGreevy	Erin Sheehan

Request Details

From the Request Details view, you can:

1. Drag & Drop file(s) into the 'Response documents' tab
 2. Add an optional description or start a discussion
- OR
1. Click 'Select files' button
 2. Select the appropriate files to be uploaded
 3. Click 'Open'
 4. Add an optional description or start a discussion

Request Details

Engagement: Year End

Request ID: 11

Request Title: Unassigned Reserves Narrative

Due Date: 03 Sep 2019

Response Documents

1 Response Document

Submitting requests



After response documents have been uploaded, it's easy to submit your request

Submit a single request from Request Details view

From the Request details view, click the 'Submit' button

11 - *Unassigned Reserves Narrative*
Requested | 03 Sep 2019 | Not following


Mark as In Progress **Submit**

Request Details Engagement Edit





Description & Templates Edit

Submit multiple requests at once

Submit multiple requests from the Requests view

1. Select the boxes to left of the requests you would like to submit
2. Click on the 'Submit' button 
3. A pop-up will display to confirm the number of requests to be submitted
4. Click 'Submit requests'

My Requests Team Requests

2 Requests 2 selected Show Accepted Show Details [Clear All Filters](#) **Submit**    

<input type="checkbox"/>	<input type="checkbox"/>	Project	Request	Status	Due Date	Request Owners
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Year End	2			
<input checked="" type="checkbox"/>	--	Core Interim 2019	10 - Investment Policy	Requested	02 Sep 2019	Clair O Merchant
<input checked="" type="checkbox"/>	--	Core Planning 2019	12 - Meeting with Mary	Requested	04 Sep 2019	Allison McGreevy

Edit a 'Submitted' request

Edit a 'Submitted' request from Request Details view

1. Open the Request Details view
2. Click 'Recall' and add a discussion, if applicable
3. The request will move to 'Returned' status
4. Update request and select 'Submit'

17 - *PPE rollforward*
Accepted | 31 Jul 2019 | Not following

Recall

Request Details Engagement Year End

Description & Templates

No description & templates to display.




Use Discussions to reduce the use of email and increase transparency! Discussions are used to correspond about a request - to provide an update, clarification or pose a question. Discussions are specific to a request and can be started by anyone with access to that request.

To create a Discussion

In Request Details

- Go to the Discussions tab within the request
- Select 'Add a Discussion' or '+Add New Topic', as applicable
- Enter Topic Title, Responders (add/remove if needed), Discussion Comment
- Click 'Save'

To add comments to an existing Discussion

- Go to the Discussion tab within the request
- Add your comment to 'Type your comment here...'
- Click  to send

Did you know?

- Upon creation of a discussion, the selected discussion responder(s) will receive an in-site notification or email, depending on user preference
- Discussions are visible to anyone that has access to that request
- All participants in the discussion and those following the request will receive a notification each time a comment is added to the discussion
- When a request reaches the 'Accepted' state, any associated discussions will automatically be closed for further commentary

Discussions dashboard

New 2019!



What is it?

All active discussions are displayed in the discussions view, accessible via the discussions tab

How do I respond to a discussion from the dashboard?

1. Click on the discussion title from the Discussions dashboard to open the request
2. Once in the request, follow the same steps as discussed on the previous page.

Did you know?

- Discussions on the dashboard can be sorted based on specific criteria including; Awaiting my response, Awaiting PwC Response, Responder, Created by me

Home	Requests	Engagement Matters	Discussions	Calendar	Team Directory	Filter
All		4 Discussions <input type="checkbox"/> Show Closed				
Awaiting My Response	Engagement	Discussion Topic Title	Status	Request	Responders	Last Modified By
Awaiting PwC Response	Interim	Please review before the due date	Open	21 - request owner add 367895	Nicholas Rymsza, Nick Rymsza	Oliver Goddard - 11 Jun 2019
Responder	Interim	Due Date	Open	8 - Financial condition of depository	Nicholas Rymsza, Nick Rymsza	Nicholas Rymsza - 19 Dec 2019
Created By Me	Interim	Listing does not tie to GL	Open	13 - Support for search for unrecorded...	James Stango, Jeffrey Vignos, Nick...	-
	Interim	Listing only provided as of 11.30. Need...	Open	15 - Unrecorded liabilities	Mary Myers, Oliver Goddard	-

Request access and roles

Updated 2019!



Improvements have been made to Connect's request access management including new user roles and new request access restrictions.

Optional restrictions for requests and documents include:

Signified by  icon on the:

Restrict access to PwC administrators, request owners, and requestees - Requests are only visible to PwC Administrators, Request Owners or Requestees

Requests view in the **'Request'** column

Restrict request reassignment - Prevents external users from modifying request assignments

Requests view in the **"Requestees"** column and in the **Request details** header

Restrict response document download—Prevents external users from opening or downloading response files uploaded by other users

Requests view in the **"Response documents"** column

Discuss with your PwC Engagement Team whether additional request level restrictions are applicable for your engagement.

Did you know?

- You can view your Site Role by accessing your profile in User Preferences.
- Site Role can only be changed by PwC Administrators. If you believe your access should be changed, you must contact your PwC Engagement Team.
- You **cannot restrict** PwC Administrators from viewing requests. If there are highly confidential documents that you do not want all PwC Administrators on your engagement to see, such requests should be coordinated outside of Connect.

User Preferences

User Profile



Nick Rymza
Client

Site Role

Client - View Assignments Only

Client Roles

***NEW* Client Request Manager—View All Unrestricted Requests** - can view all new requests by default, can create requests and manage certain requests (if assigned as a Primary or Secondary Owner).

***NEW* Client request manager—View assignments only** - Access ONLY to requests assigned as primary or secondary owner or requestee.

Client—View all unrestricted requests - can see all of the requests in the site in all engagements except requests where access has specifically been removed.

Client—View assignments only - can ONLY see requests that are assigned to you. You will see the same requests in the 'My Requests' and 'Team Requests' views.

Third Party Roles


Third Party—View assignments only—can only access requests they have been assigned as primary or secondary requestee.



Engagement teams can use Digital Library to share valuable links and or documents with you that are not specifically associated with a request, such as accounting standards, financial reporting, and regulatory hot topics! Discuss with your PwC Engagement Team what types of material would be most beneficial to your engagement.

Type	Title	Description	Category / Sub-Category	Added By	Date Added
	Accounting for US Tax Reform in Interim Reporting Periods		Tax/Tax Reform	Erin Sheehan	09 Aug 2019
	Business Combination Accounting & Reporting Guide		Accounting and Reporting/Business...	Erin Sheehan	09 Aug 2019
	CAQ publishes FAQs on critical audit matters	Starting in the summer of 2019, auditors will be required to communicate critical audit matters (CAMs) in their auditor's reports. Investors with questions about CAMs may turn to a company's investor relations (IR) group for answers. To help inform IR professionals as they prepare for those conversations, the CAQ has developed this list of frequently asked questions about CAMs.	Accounting and Reporting/Reporting	Erin Sheehan	09 Aug 2019
	Changes to SEC transaction disclosures	Podcast: 5 things you need to know about changes to SEC transaction disclosures	Accounting and Reporting	Erin Sheehan	09 Aug 2019
<input type="checkbox"/>	FASB clarifies guidance on accounting for grants and contributions		Accounting and Reporting	Erin Sheehan	09 Aug 2019
	In-Depth US 2016 - 02 FASB Lease Accounting Model		Accounting and Reporting/Leases	Erin Sheehan	09 Aug 2019
	PwC comments on extending PCC alternative for goodwill/intangibles to NFPs	Changes could be coming for not-for-profit entities. See PwC's thoughts on extending certain private company alternatives to NFPs.	Accounting and Reporting	Erin Sheehan	09 Aug 2019
	Revenue: Implementation in the higher education industry	Wondering how the new revenue standard will impact higher education entities? Let us explain.	Accounting and Reporting/Revenue	Erin Sheehan	09 Aug 2019

Did you know?

- Links and documents may be restricted to certain users or custom access groups, and are signified by the  icon next to the title.
- Only PwC users are able to upload links and or files to Digital Library. Discuss with your PwC Engagement Team what types of material would be most beneficial to your engagement.


Engagement Matters



Engagement Matters is an optional module that allows clients to view issues or other noteworthy matters, that are recorded and managed by PwC, throughout the course of an engagement. Engagement matters are created by PwC and shared with client users who have been granted access. **This module is NOT intended to take place of live discussions and other normal channels of communication.**



FLOWERS MOTORS HQ

 **Control deficiency RR - 22**
Active 07 Jun 2019

Engagement Matters Information

Engagement
Interim

Engagement Matter Title
Control deficiency RR - 22

Description
Engagement team identified three instances where the price per the sales order was modified without proper approval.

Type
Audit

Financial Statements impacted by this matter
Both


Target Resolution Date
07 Jun 2019

Location
None

PwC Owner
Oliver Goddard

Resolution
Management noted the deficiency to be remediated as of April 2, 2018. Remediation will be tested by the engagement team during the update period.

Discussed with local management?
No

 | **Flowers Motors HQ** ▾

Home Requests **Engagement Matters** Milestones Global Metrics Discussions Digital Library Calendar Team Directory

2 Engagement Matters Show Resolved | [View Client Access List](#)

Engagement Matter	Status	Target Resolution Date	Owner
Year End 1			
Control Deficiency PYRL - 2 Engagement team identified 2 instances where the salary change was not independently reviewed and approved within Workday prior to the change being made.	Active	29 Aug 2019	Allison McGreevy
Interim 1			
Control deficiency RR - 22 Engagement team identified three instances where the price per the sales order was modified without proper approval.	Resolved	07 Jun 2019	Oliver Goddard


Milestones




Milestones is an optional module that allows engagement teams to track and share the status of key dates and project deadlines. Local and regulatory milestones are created by PwC and shared with client users who have been granted access. Information will include requested information, responses and status of completion. Users have the option to filter milestones by engagement, location or team (group or component).



FLOWERS MOTORS HQ

 **Engagement Letter Executed**

Active  31 Jul 2019

Engagement
Interim

Milestone Title
Engagement Letter Executed


Description
None

Due Date
31 Jul 2019

Location
Atlanta

Team Name
Group Team

PwC Owner
Erin Sheehan

 **Connect** | Flowers Motors HQ ▾

Requests Engagement Matters **Milestones** Global Metrics Discussions Digital Library Calendar Team Directory

3 Milestones 0 selected Group By: Engagements Show Completed [View Client Access List](#)

Team Name	Location	Milestone	Status	Due Date	Owner
Interim 2	Atlanta	Audit Fee(s) Approved by Local Management	Active	07 Jun 2019	Oliver Goddard
Group Team	Atlanta	Engagement Letter Executed	Completed	31 Jul 2019	Erin Sheehan
Year End 1	Chicago	Audit Committee Presentation Reviewed	Active	22 Aug 2019	Erin Sheehan



Global metrics provides the current request status and performance indicators for progress made on requests across all teams for the global engagement including:

- # of requests
- % Outstanding
- % Overdue
- % Submitted on-time
- Avg days overdue
- Returned
- Returned > Once



Home Requests Global Metrics Discussions Calendar Team Directory

Multi-Location Regulatory

3 Teams Data is synced every two hours | [View Client Access List](#)

Requests

20 of 152 Accepted

13%
Completed

132 Active

Overdue	Outstanding	Submitted
85%	3%	12%

Milestones

0 of 4 Completed

0%
Completed

4 Active

Overdue	Outstanding
50%	50%

Team	Location	Client Year End	# of Milestones	ACTIVE MILESTONES		MILESTONE METRICS		
				Outstanding	Overdue	Opinion Type	# of Drafts	# of Adjust
Reg Team 1	Russian Federation	31 Dec 2018	3	1	2		0	0
Reg Team 2	Canada	31 Dec 2018	1	1	0		0	0
Reg Team 3	Hungary	31 Dec 2018	0	0	0		0	0

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**Q1**

Will Connect v2.7 sign-in credentials work for Connect v3? How do new users to Connect access the Connect site?

Yes, your Connect v2.7 sign-in credentials including password and username (your email address) are used to access Connect v3.

Your PwC Engagement Team will confirm the list of new users to be granted access and will register them. Once registered, members of your team will be sent an email from PwC Registration Services, notifying them of their user account (which is their email address) and temporary password.

Q2

Why do I have fewer Connect sites in v3 compared to v2.7?

In Connect v3, engagements are used to group requests and calendar entries for various workstreams. A Connect v3 site can include multiple engagements (e.g. Q1, Q2, Interim, Year-end) which may have been separate in Connect v2.7 sites. All engagements can be viewed at once, or an engagement filter can be applied to only see certain engagements. If you have access to multiple sites, information across all sites is visible on your Cross-Site Dashboard.

Q3

Can I restrict access to sensitive documents that I upload?

Yes, access to sensitive documents can be restricted to Primary and Secondary Requestees. It is recommended that the 'View Assignments Only' role be used for your team members. This permits viewing ONLY requests assigned to them as Primary and Secondary Requestees. See [page 13](#) for additional optional restrictions PwC users can apply to requests on your behalf. Note: All PwC Site Administrators will be able to view all of the requests, related documents, and discussions in your Connect site and their access cannot be restricted. If there are highly confidential documents that you do not want all PwC Site Administrators on your engagement to see, such requests should be coordinated outside of Connect.


Q4

How do I retrieve a request or an attached document once deleted?

There is no recycle bin for users in Connect. Once deleted, requests or documents are not recoverable.

Q5

Can I be notified of changes made to certain requests?

Yes, you can follow requests that you have access to. You can choose to receive in-site notifications, with or without email notifications. Follow preferences can be set on individual requests or in bulk by selecting requests in the Requests view and clicking "Following"  at the top right of the grid. The same procedure can be used to bulk remove follow preferences.

Q6

What browsers are supported by Connect v3?

We recommend utilizing the latest version of Chrome or Internet Explorer 11; however, Connect v3 will also support the latest version of Firefox, Edge and Safari (for Mac).

Q7

How do I enable my profile in the Team Directory?

On the Requests view click your name and select 'User Preferences'. Slide the 'Visible in Team Directory' toggle to 'on' and enter phone number (optional).

**Q8**

Connect v2.7 included comments and alerts. What functionality exists in Connect v3 to replace comments?

Discussions can be created and are linked to requests. They can be used to request additional instructions or clarification, draw attention to updated information, or indicate the reason for a request recall. A PwC user or client can initiate a discussion.

Q9

What are Engagement Matters?

Engagement Matters are issues or noteworthy items recorded and managed by PwC users in an optional module. Engagement Matters can be shared with certain members of your staff. Engagement Matters are marked 'Resolved' once complete.

Q10

Can I customize the 'My Requests' and 'Team Requests' view?

Use the show/hide columns functionality to adjust the view on the Requests view including adding or removing other columns. Column location can be changed by dragging and dropping to another location on the grid.

Q11

I received a dialogue saying that my session is about to timeout. What does this mean?

For security purposes, after authenticating into a Connect site, the system keeps track of how much idle time has passed since there has been any activity in the site. After a period of 25 minutes of idle time, the system will prompt the user with a session timeout pop-up which allows the user to extend their session or to log out. If choosing to extend the session, you will be able to continue working on the site without having to authenticate again. If choosing to sign out, you will be directed to the sign out page.

Q12

How do I make edits to response documents or delete documents attached to requests?

You can only upload a new document for updates as edits cannot be saved within Connect. To update a response document, open the request, navigate to 'Response Documents' tab and select the 'X' next to the attached document to delete. Upload a new response document.

Q13

How can I manage the emails I receive from Connect?

You can manage your email notification preferences related to a Connect site by accessing your User Preferences. (See [page 4](#)).

Q14

How does the Calendar view work?

Calendar provides an overall calendar view of when requests, Engagement Matters or Milestones you have access to are due (view by day, week or month). It also shows custom entries.

Q15

Who should I contact for additional assistance?

Please reach out to your PwC Engagement Team with any further questions about Connect v3.



Thank you!

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