Connect – Site Admin

Quick reference card for PwC teams

Engagements

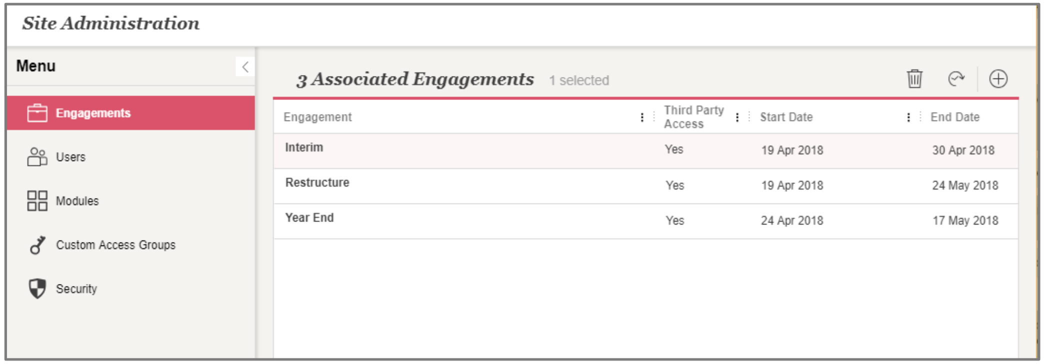
All Connect site content (e.g. discussions, requests etc) is grouped by engagement. Your Connect Site can include **multiple** engagements for your client (e.g. Quarterly, Interim and Year End).

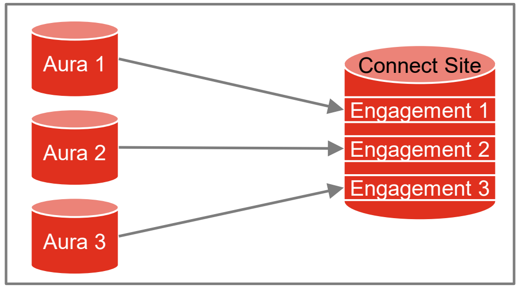
At least one engagement must be created before any requests, engagement matters or milestones can be added to a site.

Tips for linking to Aura sites:

- When you have a Q1 Aura file that is rolled forward to Q2 and Q3 (in the same fiscal year) you will never have more than one Aura file attached to the "quarter" engagement at a time. It is important to **roll-forward the Connect engagement FIRST**, and then roll-forward the Aura file.
- When the structure of your Aura file and Connect requests is **consistent between quarters**, you can create one quarterly engagement then 'Purge & Roll-forward' to the next quarterly engagement. All templates, owners, requestees, and mapping to Aura EGAs will remain with their associated requests, if setup in the initial quarterly engagement.
- If you issue **multiple audit reports** out of one Aura file and have to copy and archive multiple times, you should copy the Aura file > archive the copied Aura file > continue working in the Aura file linked to the Connect engagement.

For specific instructions on how to Purge & Roll-Forward Engagements see Purge & Rollforward Playbook.





Each Connect engagement can only be linked to one Aura file. However, one Aura file can be linked to multiple engagements.

Keep in mind when creating an engagement

- Start and End Date should reflect the timing of engagement work, NOT the period under audit or review.
- Refer to Playbook - New Client Setup (Step 2.1 Setup engagements) for more information on 'engagements' and linking to Aura.
- You can modify the option to **Allow Third Party Requests** at a later date.

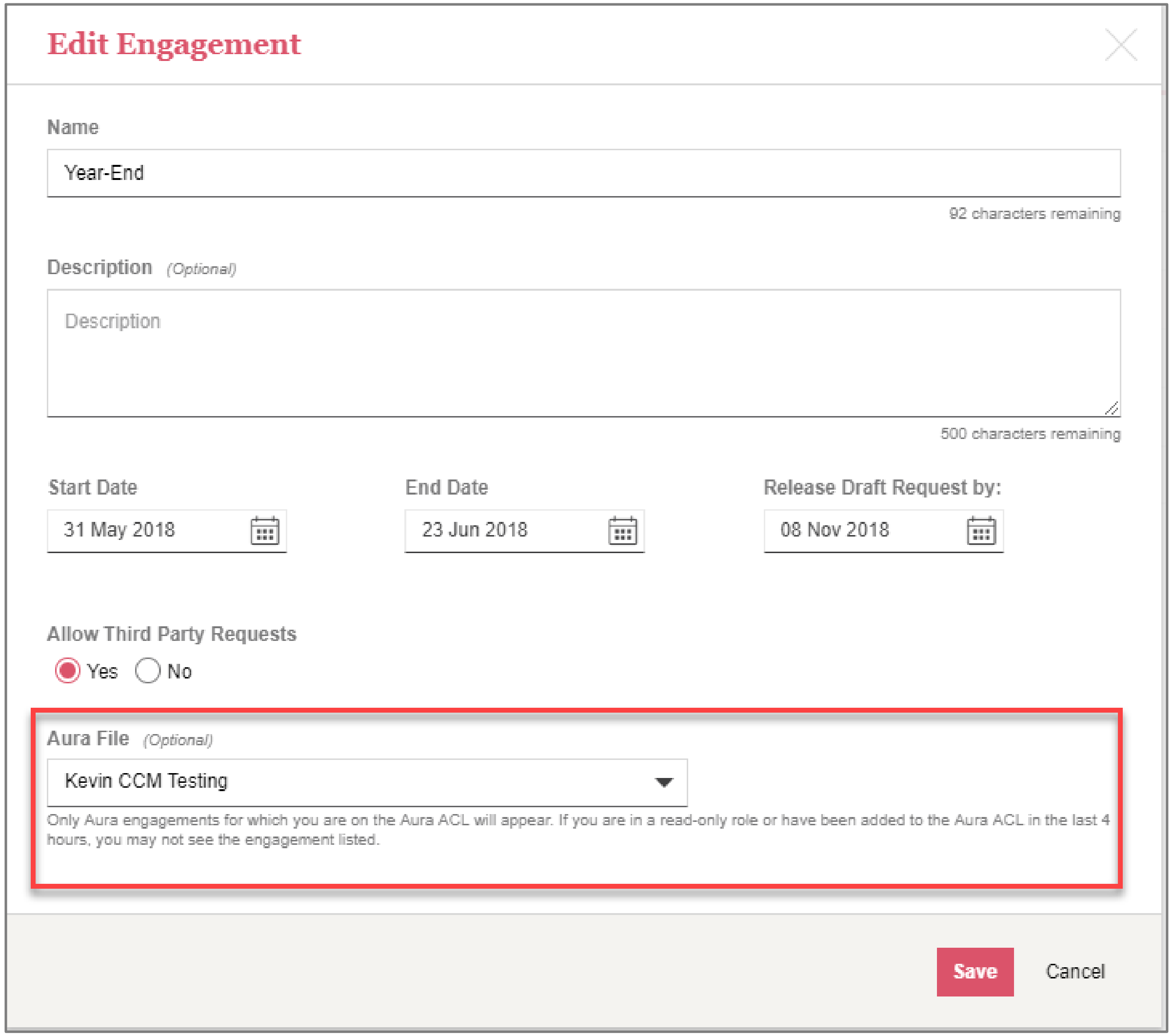
pwc

Aura Integration

To get the most efficiencies for your engagement make sure to link your Connect Engagements to the related Aura file.

- To link your Aura file(s) navigate to Site Admin -> Engagements
- View the Engagement's details by clicking on the name of the Connect Engagement
- Select the appropriate Aura file from the drop down list. Active Aura files to which you have access will be available in the drop down.
- Click Save

Refer to the following resources for additional functionalities once your Aura file is linked to Connect: Mapping Requests to Aura, Monitoring Requests in Aura, and Sending Documents to Aura.



Keep in mind

- Each Connect engagement can only be linked to one Aura file. However, one Aura file can be linked to multiple Connect engagements.
- Only Aura engagements for which you are on the Aura ACL will appear. If you are in a read-only role or have been added to the Aura ACL in the last 4 hours, you may not see the engagement listed.
- Refer to tips for linking to Aura sites on page 1

Users - PwC

PwC Users can be added -

- **From your Aura ACL** when you link your Aura file to a Connect Engagement(s) by clicking on .
  - Refer to the prior page for how to link your Aura file to a Connect Engagement(s)
- By clicking on 'Add'
- By clicking 'Import from File' and populating the User Import Template

Change multiple users' access by selecting the checkbox next to each user(s) and clicking 'Replace Connect Role'

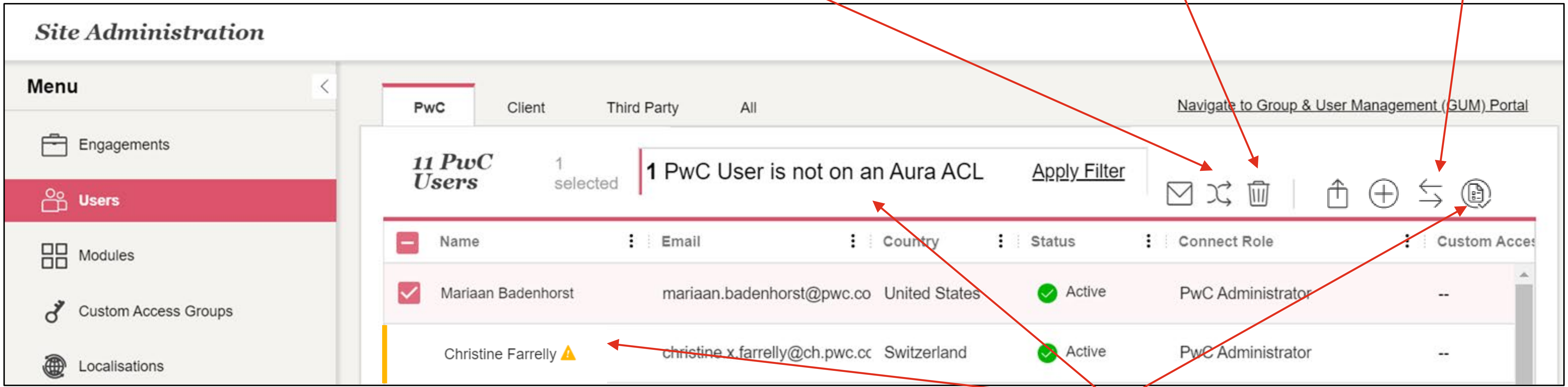
Remove User Access

Before deleting the users, you will be notified if the user is still associated with any requests, discussions, engagement matters, or milestones and required to reassign.

Find and Replace Users

This will apply to all associations throughout the site including Requests, Discussions, Engagement Matters, Milestones and Custom Access Groups from one user to another.

TIP: *The Replacement Assignee must have the same or higher access as the Assignee in order to replace*



Did you know?

- PwC, client and third party users can all be added with the same User import Template file. Ensure that all external domains have been added to the appropriate approved domains list.
- See the QRC Managing Access and Restrictions for more details on specific user roles, access and additional optional restrictions.

Compare the PwC users in Connect with PwC users in Aura

1. Identify PwC users within the linked Aura ACL(s) that do NOT have access to the Connect site. Select and add users as necessary. **Added users will be mapped to their highest corresponding Connect role by default.** See page 5. **If a user doesn't show up after he/she is added,** this may indicate the user changed his/her name/GUID, or that the individual no longer works at the firm. Confirm the correct user is selected, and create an IT ticket if you experience any issues.

1. Identify PwC users within the Connect site that do NOT have access to the linked Aura ACL(s). Any users identified are indicated by the yellow bar and triangle. You can easily filter for these results using the filter displayed above and select and remove users as necessary.

Users - Client and Third Party

Client and Third Party Users

Approved domain(s) need to be separately added on the Client and Third Party tabs, through Manage Domains before adding users by -

- Clicking on 'Add'
- Clicking 'Import from File' and populating the User Import Template

Tip

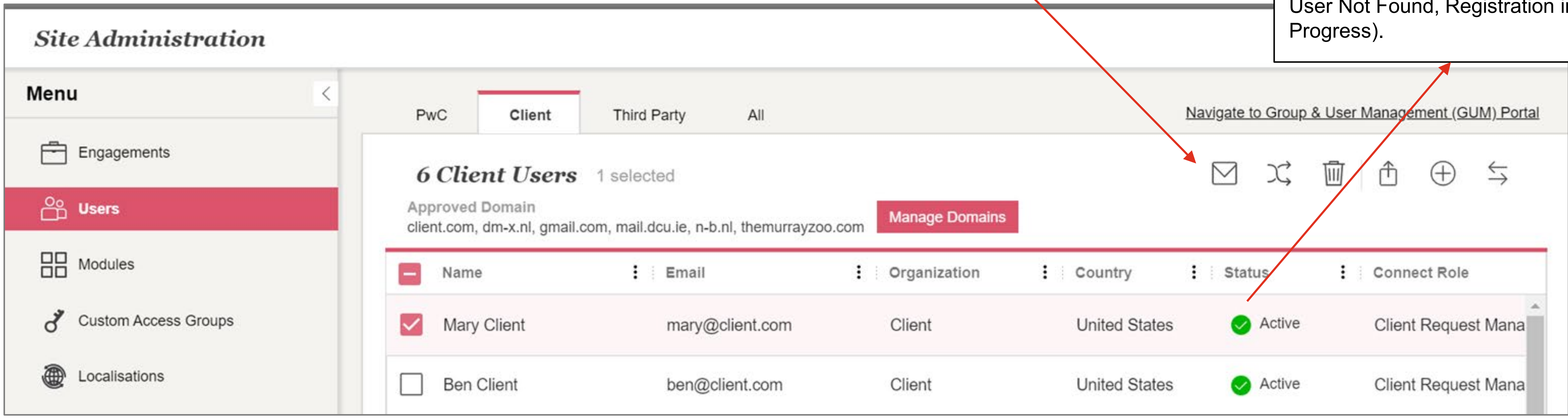
You can resend **Welcome email** any time by selecting the user and clicking the Mail Envelope icon

Did you know?

You can **Export a Listing of all Users** by:

1)Clicking on the 'All' users tab
2)Clicking on the 'Export' button

See page 5 for explanation of various statuses (Active, Disabled, User Not Found, Registration in Progress).



Remember:

- Refer to the prior page for how to change user roles and find and replace users site-wide.
- PwC, client and third party users can all be added with the same User import Template file. Ensure that all external domains have been added to the appropriate approved domains list.
- See the QRC Managing Access and Restrictions for more details on specific user roles, access and additional optional restrictions.

Two Options for registering a New External Users(s) (i.e. never had access to Connect previously)

1. For external users(s) that will need immediate access to your Connect site, register the external use(s) directly in GUM. Refer to the **GUM QRC**
2. For external users that do NOT need access to our Connect site **within 24 hours** of registration, you can register them directly within Connect.
   a. Adding manually - Click 'Register a New User' when adding users on the 'Client' or 'Third Party' tab

      Didn't find who you were looking for? Register a New User

   a. Bulk import - Populate the required fields in the User IMport Template file.

Users - Roles and Statuses

PwC Users imported to Connect from Aura will automatically be assigned based on the Default Connect Role matrix. To update a user's role, PwC Administrator must do so by selecting 'Replace Connect Role' .

Aura Role	Default Connect Role
File Owner, Engagement Leader, and Team Manager	PwC Administrator
Reviewer, COE Reviewer, Team member, COE Team member, and QRP	PwC – View All Unrestricted Requests
SDC User and SDC Reviewer	PwC SDC User
Read Only	Read Only

Refer to QRC Managing Access and Restrictions for detailed description of each Connect Role.

Reminder: The PwC Administrator role should be limited to a few necessary PwC team members based on the engagement teams determination. PwC Administrators have access to everything, and can manage all site settings, content and user access. Their access cannot be **restricted from viewing requests.**

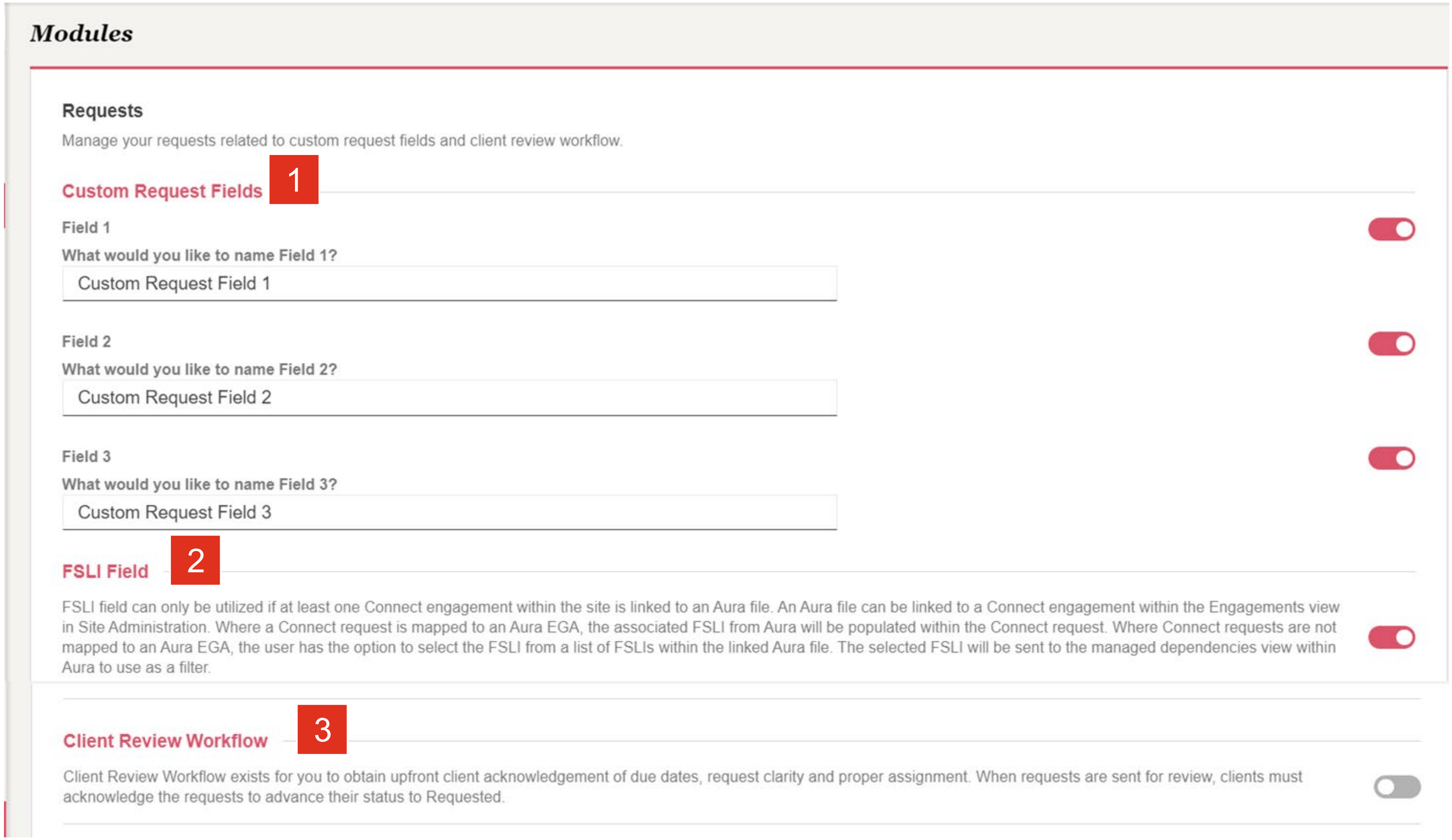
Not sure what a user's status means? See table to the right.

Status	Explanation
Active	Client, PwC, or Third Party Users Active
Disabled	Client or Third Party has not accessed Connect in > 1 year. Refer to GUM QRC to enable account.
User Not Found	PwC user no longer exists. Could be due to name change, or individual having left firm.
Registration In Progress	Client or Third Party User was recently added to GUM. May take up to one hour for registration to complete. Status will become 'Active' once registration is complete.

Modules

1. Custom Request Fields
Used to categorize and organize requests (e.g. FSLI, Business Unit, project or category). See [Creating Requests QRC]() for more detail.

2. FSLI Field
Where a Connect request is mapped to an Aura EGA, the associated FSLI from Aura will be populated within the Connect request. Where Connect requests are not mapped to an Aura EGA, the user has the option to select the FSLI from a list of FSLIs within the linked Aura file. The selected FSLI will be sent to the Aura Connect Requests Manager to use as a filter.

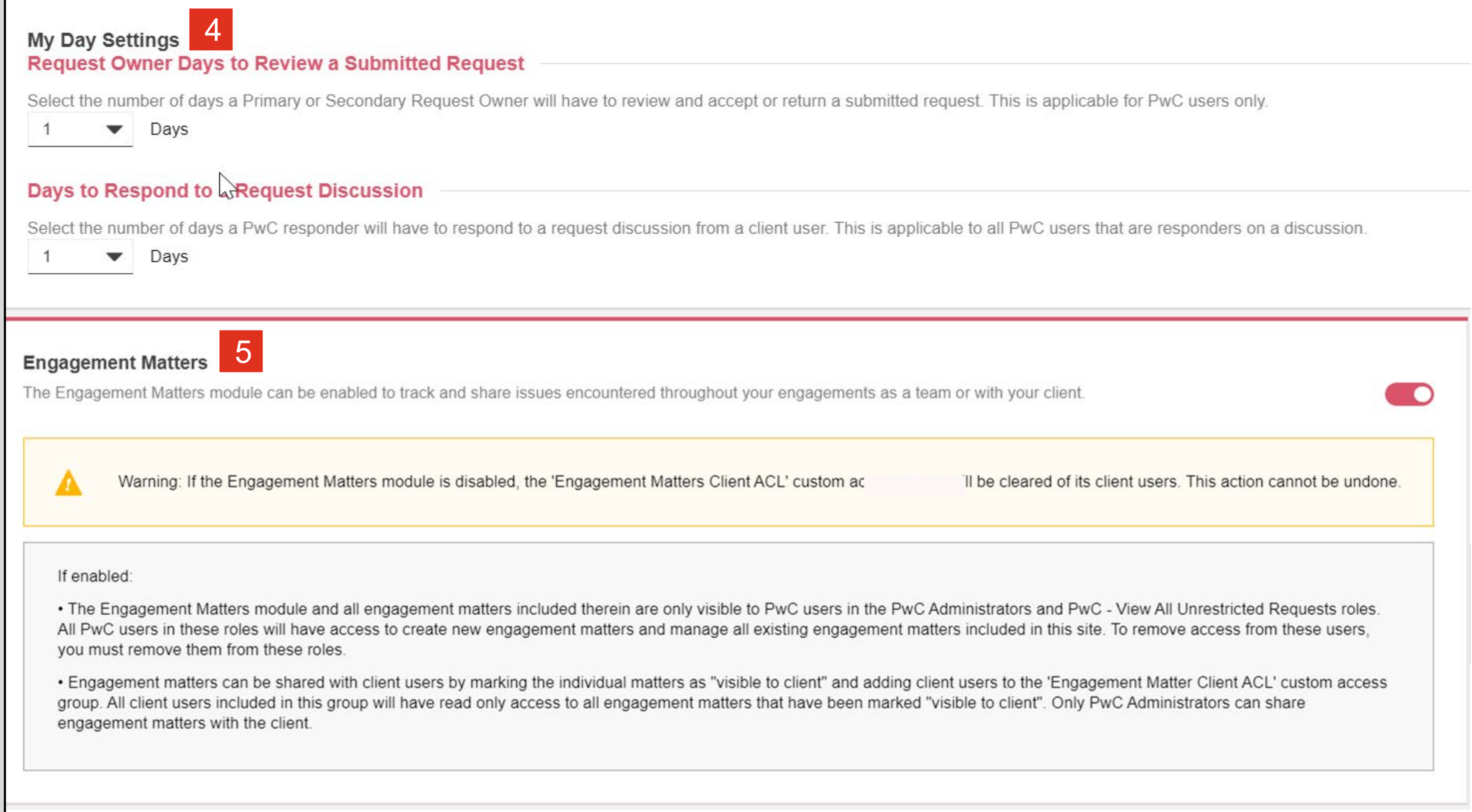


3. Client Review Workflow
Allows PwC users to obtain upfront acknowledgement from the client on due dates, request details and assignments. By default this optional workflow is turned off. Once enabled, select which requests will be created with the status ‘In Client Review’, ‘Draft’ or ‘Requested’. Requestees must acknowledge ‘In Client Review’ requests before they become ‘Requested’.

Modules

4. My Day Settings
Select the number of days PwC users will have to review and accept or return a submitted request or respond to a request discussion from a client user. See My Day QRC for more details.

5. Engagement Matters
The ‘Engagement Matters’ module can be used to track and share issues encountered throughout the course of the engagement. This functionality is optional and you can determine whether to share the matters with the clients who are part of the Engagement Matters Access Control List (ACL). See Engagement Matters QRC for more details.

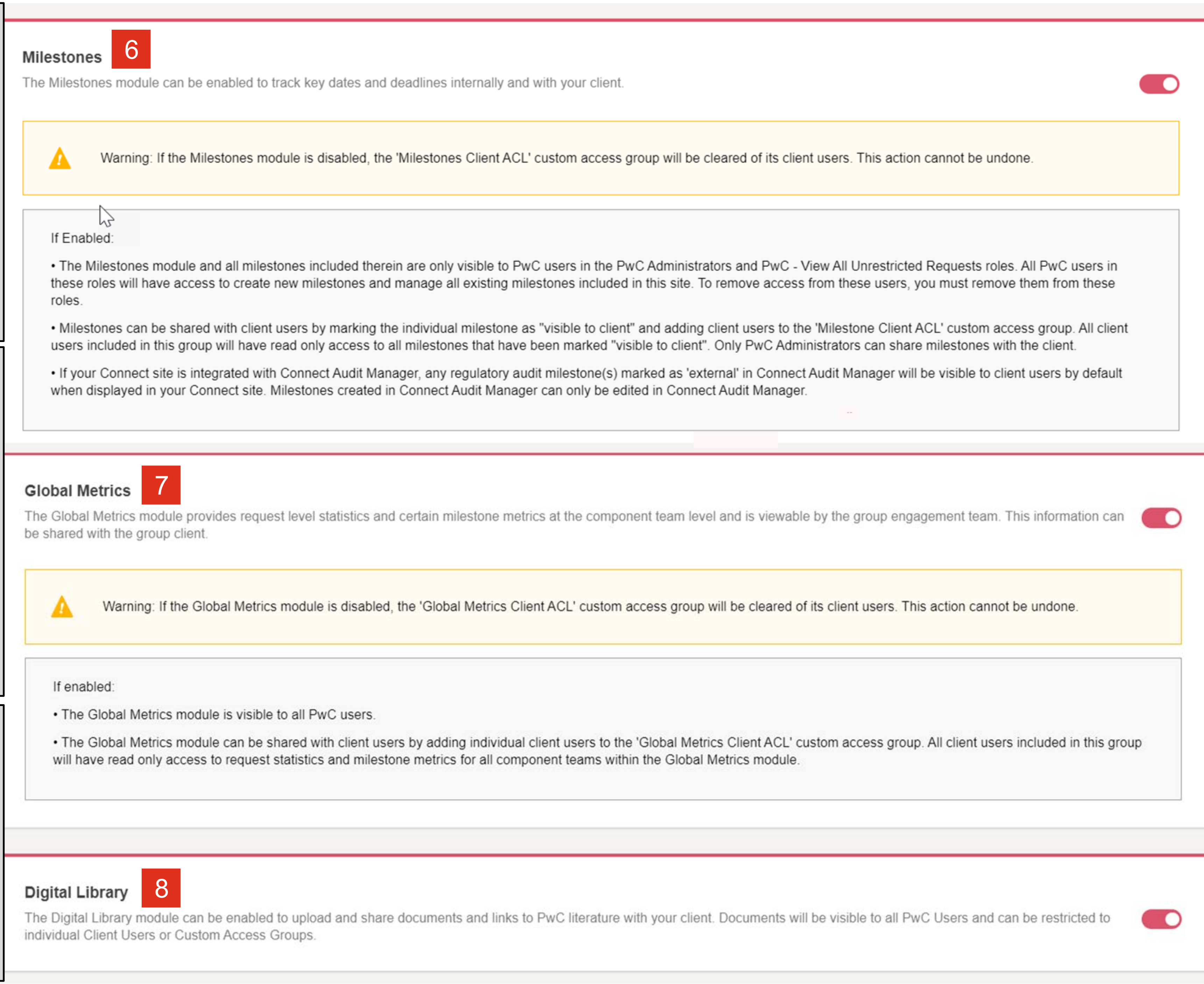


Modules

6. Milestones
Milestones is an optional module that allows engagement teams to track and share the status of key dates and project deadlines. Local milestones are created in Connect and shared with client users who have been granted access. See Milestones QRC for more details.

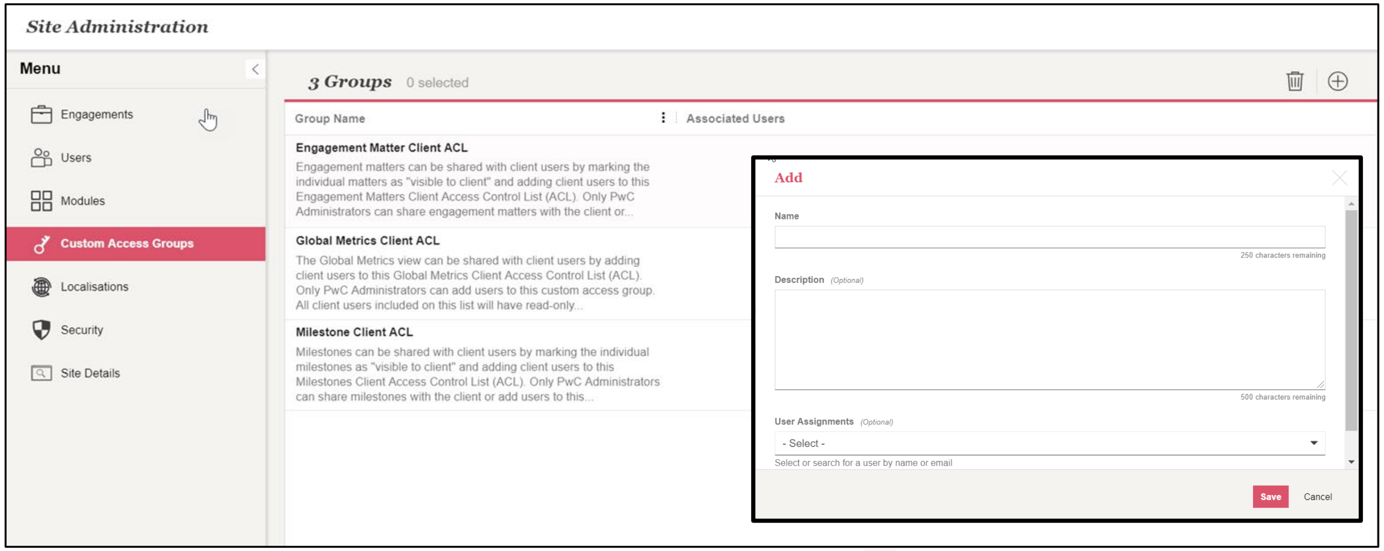
7. Global Metrics
The ‘Global Metrics’ module can display the current request status and performance indicators for progress made on requests across all teams for the global engagement. Global Metrics are only visible to the group engagement team and can be shared with client users. See Global Metrics QRC for more details.

8. Digital Library
Digital Library lets PwC users share documents or links to other websites with client users that are not associated with a request. Documents or links can be shared client users. *Digital Library CANNOT be accessed by Third Party users.* See Digital Library QRC for more details.



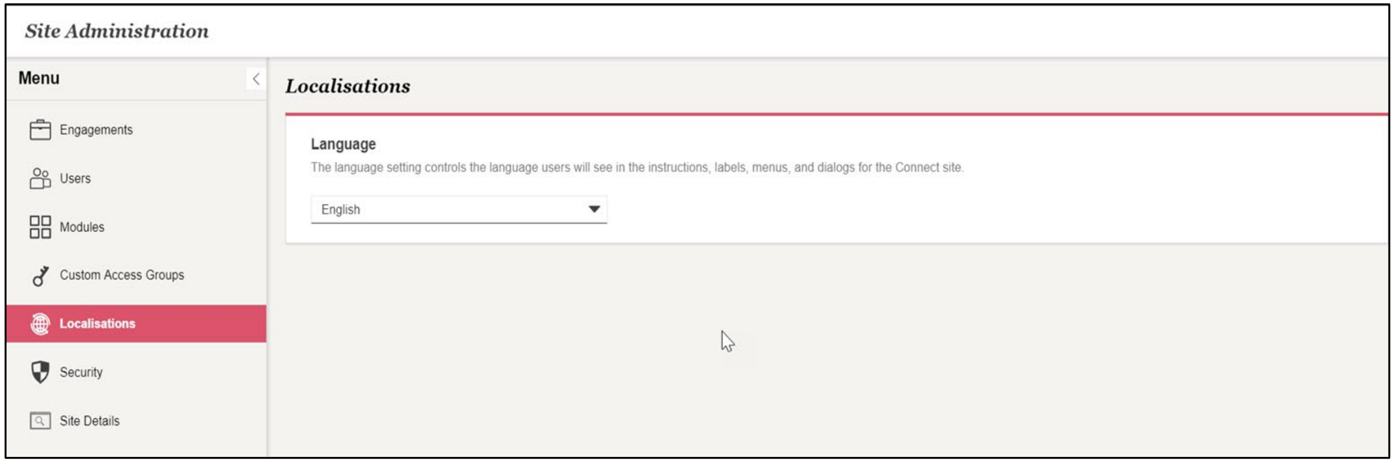
Custom Access Groups

- Client users need to be added to the Engagement Matters, Global Metrics and Milestones Client Access Control List(s) in order to see the related items when they are made visible to the client.
- When users access is managed using the user roles and request access restrictions available in Connect v3, the need for ‘custom access groups’ should be eliminated or greatly reduced.
- See QRC Managing Access and Restrictions for more details on specific user roles, access and additional optional restrictions.



Localisations

- To change the language users will see in the instructions, labels, menus, and dialogs for the Connect site, navigate to the Localisations module and select a language from the drop down.
- Changing the language of the site will not change the language of any user inputs such as request title or description. Further, the site creation form and Cross-Site dashboard will remain in English.



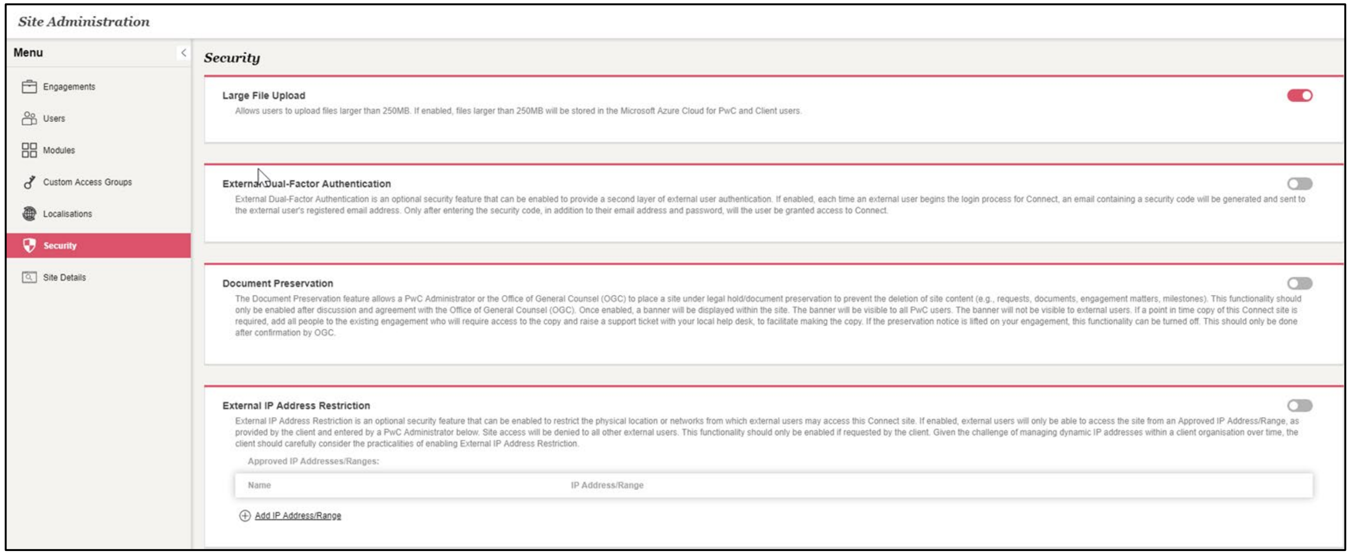
Security

Toggle to enable optional security settings

- Large File Upload
- External Dual-Factor Authentication
- Document Preservation
- External IP Address Restriction

Optional security features should only be enabled if agreed with the client.

See QRC Optional Security Settings and Document Preservation for specific details.



Site details

Site Details allows you to 1) delete a site or 2) make edits to the following:

- Connect Site Name
- Office
- Engagement Leader

All engagements have to be purged and deleted before a site can be deleted. Once a site is deleted it cannot be undone.

If a site is to be used for testing purposes only, select '**Yes**' in the relevant dropdown.