

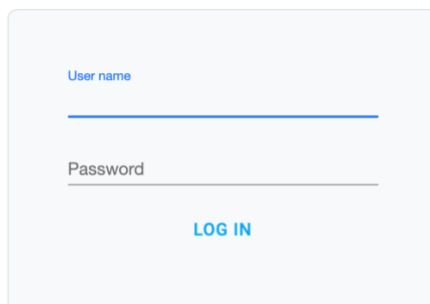
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1. Creation of Engagement

1.1. LOG IN

- Please enter your username and password.



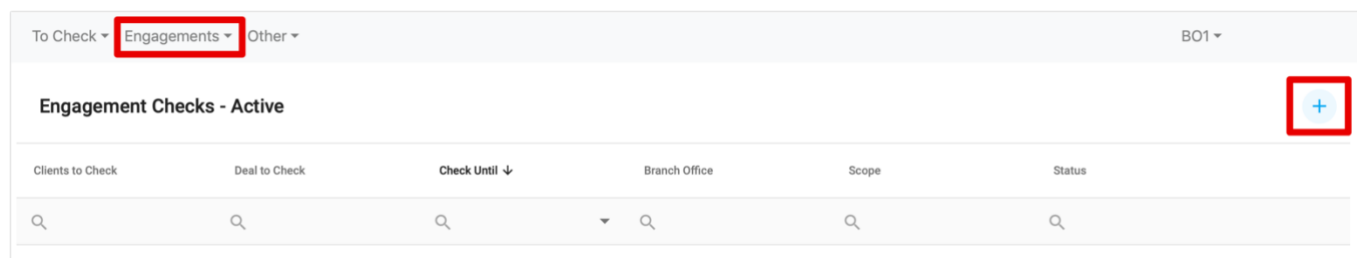
User name

Password

LOG IN

1.2. Create new Engagement

- Select Engagements – Active.
- Use "plus" to create new engagement.



To Check ▾ Engagements ▾ Other ▾ BO1 ▾

Engagement Checks - Active

Clients to Check	Deal to Check	Check Until ↓	Branch Office	Scope	Status
🔍	🔍	🔍	▼ 🔍	🔍	🔍

- Enter engagement details (put the Client name and Tax Id exactly, it will be used for Automatic Check. Automatic Check is a feature for branch offices with imported / entered clients. This feature doesn't require manual check or confirmation).
- Select scope (International means Transnational audit ALL ECOVIS network will be notified).
- Check end deadline.
- Click on Create.

To Check ▾ Engagements ▾ Other ▾

Engagement

Deal Name
AUDIT@7.3.2019_xyyz

Client Names To Check
Millers Oils

Tax Ids To Check
123456789

Note

Create

Branch Office *
B01 CZ

Scope *
International

Check until
July 06, 2019

- You can see or check new engagement.

To Check ▾ Engagements ▾ Other ▾ BO1 ▾

Engagement Checks - Active

Clients To Check	Deal to Check	Check Until ▾	Branch Office	Scope	Status	
Millers Oils	AUDIT@7.3.2019_xyyz	July 06, 2019	B01 CZ	International	Checking	 

- Engagement check detail.

To Check ▾ Engagements ▾ Other ▾ BO1 ▾

Engagement

Deal Name
AUDIT@7.3.2019_xyyz

Client Names To Check
Millers Oils

Tax Ids To Check
123456789

Note

Save

Branch Office
B01 CZ

Scope
International

Check until
July 06, 2019

Status: Checking

Inspecting BranchOffice	Result	Automatic Check Finished	Fiction Consent	Note
B02 CZ	Checking	ConflictFound	☐	
B03	Checking	NotAvailable	☐	

1.3. Engagement check results

- After the deadline or when all relevant branches make check, you will receive notification.

Your Independence Check Ready to Review: Deal AUDIT@7.3.2019_xyz



noreply

Marek Smrček

středa 3. července 2019 11:26

[Zobrazit podrobnosti](#)



[Stáhnout všechno](#)

[Zobrazit náhled všech](#)

Please note a new independence check result ready to review.

You can review your independence check [here](#).

1.3.1. In case when one branch identifies conflict, the engagement is rejected

- Your option is to change the preliminary results – edit the engagement.



Engagement Check Results

Status: Rejected

Deal Name: AUDIT@7.3.2019_xyz

Branch Office: BO1 CZ

Clients to Check: Millers Oils

Tax Ids to Check: 123456789

Check Until: July 06, 2019

Inspected By Branch Office	Result	Note	Office Email	Office Phone
BO2 CZ	IsConflict	note is needed - xxxxxxxxxxxxxxxxxxxx	milos.fiala@ecovis.cz	
BO3	Okay		pmzlin@gmail.com	

1.3.2. You can change the status to approved

- Documentation of your decision is requested.
- Then you can change the status.
- Save your changes.

To Check ▾ Engagements ▾ Other ▾
BO1 ▾

Engagement

Deal Name
AUDIT@7.3.2019_xyz

Client Names To Check
Millers Oils

Tax Ids To Check
123456789

Note
note is needed - yyyyyyyyyyy

Save Approve

Branch Office
BO1 CZ

Scope
International

Check until
July 06, 2019

Status: Rejected

Inspecting BranchOffice	Result	Automatic Check Finished	Fiction Consent	Note
BO2 CZ	IsConflict	ConflictFound	☐	note is needed - xxxxxxxxxxxxxxxxx ✎
BO3	Okay	NotAvailable	☐	✎

- You will receive new notification with report.
- Engagement check result - changed to approved.

Engagement Check Results

Status: Approved

Deal Name: AUDIT@7.3.2019_xyz Check Until: July 06, 2019

Branch Office: **BO1 CZ**

Clients to Check: Millers Oils

Tax Ids to Check: 123456789

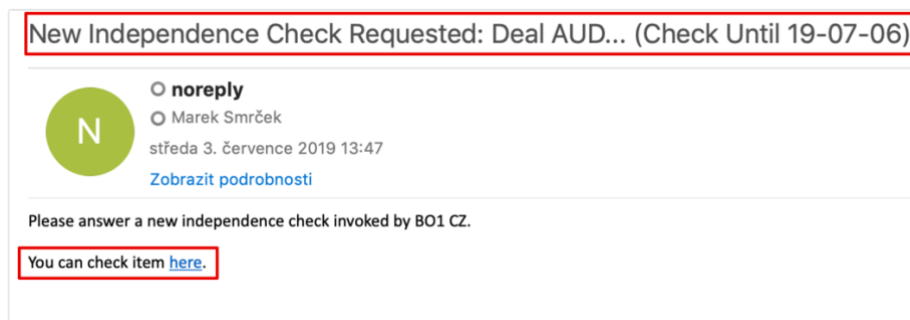
Note:
note is needed - yyyyyyyyyyy

Inspected By Branch Office	Result	Note	Office Email	Office Phone
BO2 CZ	IsConflict	note is needed - xxxxxxxxxxxxxxxxx	milos.fiala@ecovis.cz	
BO3	Okay		pmzlin@gmail.com	

2. Check procedure

2.1. You will receive an email requesting your action

- Click on link to log in AURE.IND.



2.2. LOG IN

- Please enter your username and password.

User name

Password

LOG IN

2.3. To check – Active engagements

- To Check, select Active.
- You can see all active Independence Check Requested.
- Click on Pen symbol to open and Check Engagement details.

The screenshot shows the 'To Check' tab in the AURE SW interface. At the top, there are tabs for 'To Check', 'Engagements', and 'Other'. Below these is a filter section with 'Active' and 'Archive' buttons. A table lists audit orders with columns: Clients to Check, Deal to Check, Result, Check Until, Automatic Check, Inspecting Branch Office, Requesting Branch Off..., and Note. The first row is highlighted in red, showing ID 'NNNN1', Deal 'AUDIT@7.3.2019_x...', Result 'Checking', Check Until 'July 06, 2019', Automatic Check 'NotAvailable', Inspecting Branch Office 'B03', and Requesting Branch Off... 'B01 CZ'. A blue pen icon for editing is highlighted in red at the end of the row.

2.4. Select your option

- Select your option – No Conflict or Conflict.
- Insert your note – if you choose Conflict, note is required. Describe potential conflict.
- Save your changes.

The screenshot shows the 'To Check' tab in the AURE SW interface. It displays a form for selecting an option. The 'Inspecting Office' is 'B03' and 'Check Until' is 'Jul 6, 2019'. The 'Branch Office' is 'B01 CZ'. The 'Deal Name' is 'AUDIT@7.3.2019_xxyz'. The 'EngagementCheck Note' is 'YYYYYYYYY'. The 'Clients To Check' is 'NNNN1'. The 'Tax Ids To Check' is '123456789'. The 'Result' section has three buttons: 'Checking' (selected), 'No Conflict', and 'Conflict'. The 'Note' field is empty. The 'Save' button is highlighted in blue.

2.5. Automatic Check

- This function, when is active for Branch Office will automatically check lists of clients - Client Name and Tax Number. When a Client Name or a Tax Number will same or very close to Client Names or Tax Numbers from New Independence Check Requested - the result will be Conflict.
- In case that Client Names or Tax Numbers are difrent the result will be automatically No Conflict.

3. Administration tasks

3.1. Edit Branch office details

- Click on Pen symbol to open and edit Branch office details.
- You can change for example primary email, where notification will be sending etc.
- Automatic Check - If you want activated Automatic Check, use Check Mark Provides Clients Data. Another condition is that clients your Branch Office are "fresh". Thats mean, last clients import is no older than 90 days.
- Save your changes.

Branch Office

Email
m.smrcek@attis.cz

Fax

Note
Praha

Provides Clients Data
☒

Aure BackOffice EndPoint

SAVE CANCEL

3.2. Clients

3.2.1. Manually add a new client

- Use "plus" to add a new client.

To Check Engagements Other
BO1

Clients
+

Branch Office ↑ Name ↑ Tax Number

(All)

No data

Number of Records: 0

Import Clients

SELECT FILE

Allowed file extensions are xlsx or xls.

- Fill Name, TN, select Branch Office.
- Save your changes.

Client

Name *

Tax Number

Branch Office
Select...

SAVE CANCEL

3.2.2. Import Clients

- Prepare import file (xlsx or xls) in correct form.

Info

	A	B	C
1	BranchOfficeId	Name	TaxNumber
2	1	Client name 1	TN 123456
3	1	Client name 2	TN 234567
4	2	Client name 3	TN 345678

Tab 1: Imported file example (all data must be defined)

- Excel structure is mandatory (Tab 1)
- Only first sheet is imported
- First row is header and is ignored
- Empty rows are skipped
- Rows with both empty TaxNumber and Name are ignored
- Rows with invalid BranchOfficeId are ignored
- Information about BranchOfficeId is in BranchOffice Detail

- Use button SELECT FILE and import your new clients.

3.3. Users

- You can add new user or edit users details.
- Use plus or pen symbol for add in or editing user.

- Fill or edit Login, First Name, Last Name etc.
- Save your changes.

User

Logon *

ATTIS

Branch Office

B01 CZ

First Name

Marek

Password

Last Name

ATTIS

E-mail

m.smrcek@attis.cz

Locked

☐

Change Pass On Next Logon

☐

SAVE

CANCEL

4. Help Desk

4.1. Support for end users

- Please contact you local support: [link](#)

4.2. AURE.IND support

- <http://support.attn.cz>
- Log In with your user name and password.



Welcome! Please enter your user name and password below.

USER NAME:

PASSWORD:

Log On

4.2.1. Create new ticket

HELPOESKWEB

Active Issues

Issue Archive

Kb

Kb Drafts

Job Definition

Ticket

New

0

Open Id

8463

ID	SUBJECT	CUSTOMER STATE	SUBMITTER	EXPECTED C	CUSTOMER
8 463	Požadavek na funkcionalitu HelpDesku	In progress	josef.hlavnc		99

<

1

>

PAGE SIZE 20

- Please fill ticket form:
 - Subject
 - Description
 - Optionally – High, Low or Medium priority
 - You can Add Attachment
 - Select request type – Bug or Request
 - Requested deadline

The screenshot shows the 'Ticket' form in the AURE SW application. At the top, there's a header with a menu icon, a user icon, and a 'My Account' link. Below the header, the 'Ticket' title is followed by a toolbar with icons for status, priority, and other actions. A '0' is displayed next to 'Open Id'. To the right of the toolbar are buttons for 'Add Attachment', a chat icon, a calendar icon, a shopping cart icon, and a three-dot menu icon. The main form area has a 'SUBJECT:' label followed by a text input field. Below this is a rich text editor with a toolbar containing various formatting options like bold, italic, underline, and link. To the right of the text editor is a sidebar with fields for 'REQUEST TYPE:' (set to 'Request'), 'REQUESTED DEADLINE:', 'CUSTOMER PRIORITY:' (set to '99'), and 'ID:' (set to '0'). At the bottom of the form, there are tabs for 'Design', 'HTML', and 'Preview', and a 'General' tab with an 'Attachments' button.

- Save and Close.

This screenshot shows the same 'Ticket' form as before, but with the three-dot menu icon in the top right corner clicked. A dropdown menu is now visible, containing the following options: 'Save and Close' (highlighted with a red box), 'Show Changes' (with a 'Save and Close' button next to it), a numeric input field with the value '0', 'Set Priority (1 - highest)' with a value of '0', and 'CorrectRemainingTimeGuess'. The rest of the form remains unchanged.

4.2.2. Active Issues

- Click on selected ticket.

HELPDESKWEB

Active Issues

Issue Archive

Kb

Kb Drafts

Job Definition

Ticket

New

0

Open Id

8463

ID	SUBJECT	CUSTOMER STATE	SUBMITTER	EXPECTED C	CUSTOMER I
8 463	Požadavek na funkcionalitu HelpDesku	In progress	josef.hlavnc		99

PAGE SIZE 20

- You can check new comments, change customer state or add new attachment.

HELPDESKWEB

Active Issues

Issue Archive

Kb

Kb Drafts

Job Definition

Ticket

0

Open Id

Add Attachment

Požadavek na funkcionalitu HelpDesku

11.6.2019 13:41

posílám přílohu s motivem helpdesku jiného dodavatele

11.6.2019 13:33 msmrcek

OK díky za podklady.

None

New

Active

Cancelled

Duplicite

MissingInfo

Postponed

ToAccept

AcceptedByCustomer

Deadline Required: 30.9.2019, State: In progress, Id: 8463

- You can add new comment.

HELPDESKWEB

Active Issues

Issue Archive

Kb

Kb Drafts

Job Definition

Ticket

0

Open Id

Add Attachment

Add Comment

CreateChatAction

Postpone 1 day

Set properties

Create Order

Show Changes

Set Priority (1 - highest)

CorrectRemainingTimeGuess

Požadavek na funkcionalitu HelpDesku

11.6.2019 13:41

posílám přílohu s motivem helpdesku jiného dodavatele

11.6.2019 13:33 msmrcek

OK díky za podklady.

11.6.2019 13:28