AURE SW **A way to effective management of audit orders**

User manual

AURE Software s.r.o.
Hanušova 100/10, 779 00 Olomouc, Czech Republic
www.auresw.cz, e-mail: auresw@auresw.cz, tel.: +420 725 481 906

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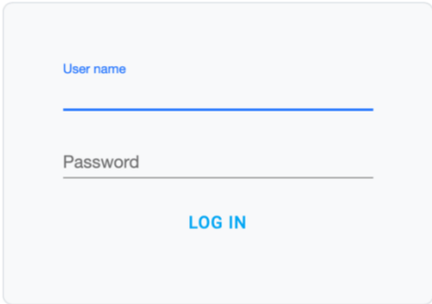
1. Creation of Engagement

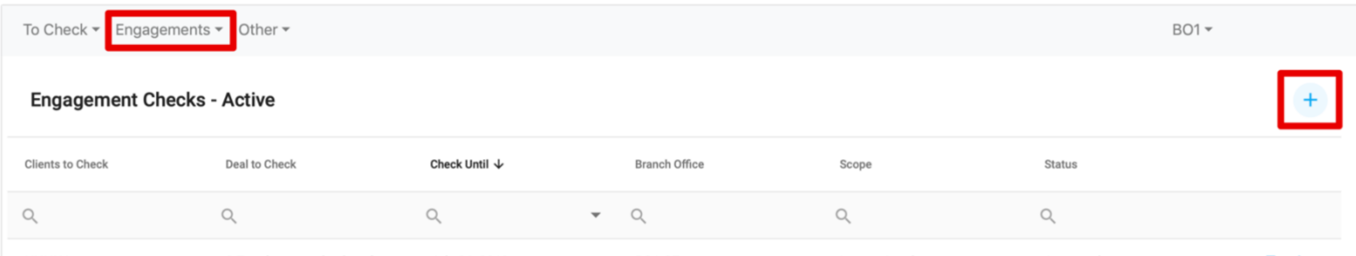
1.1. LOG IN

- Please enter your username and password.

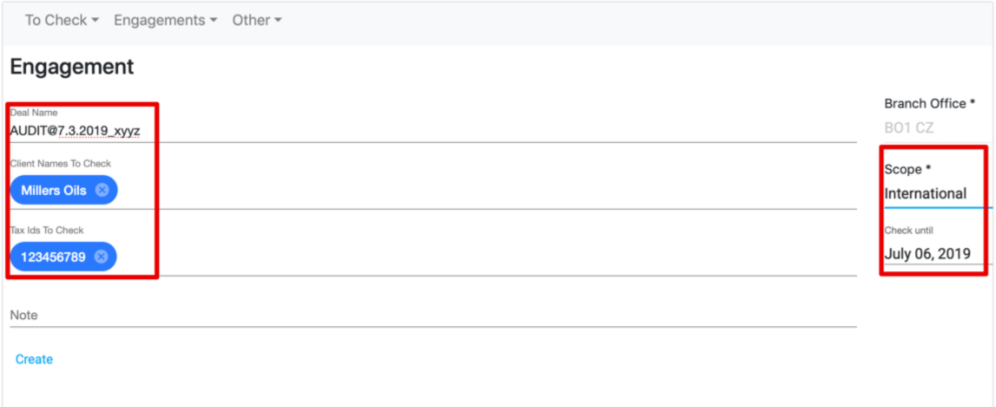


1.2. Create new Engagement

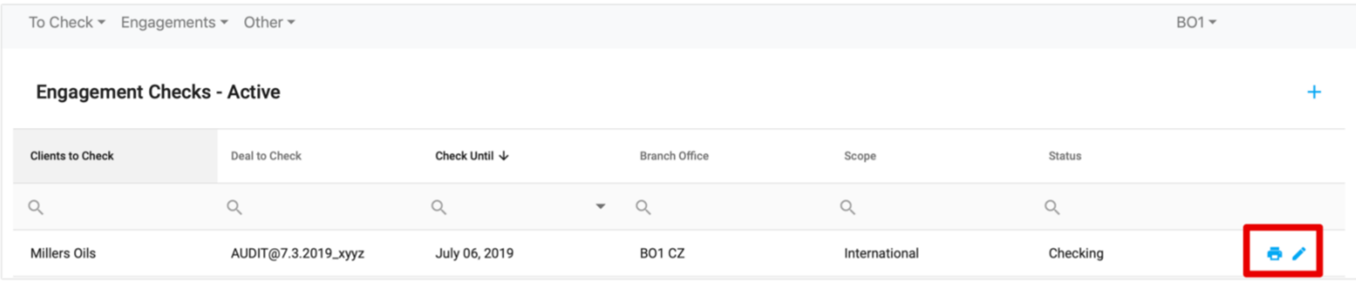
- Select Engagements – Active.
- Use "plus" to create new engagement.



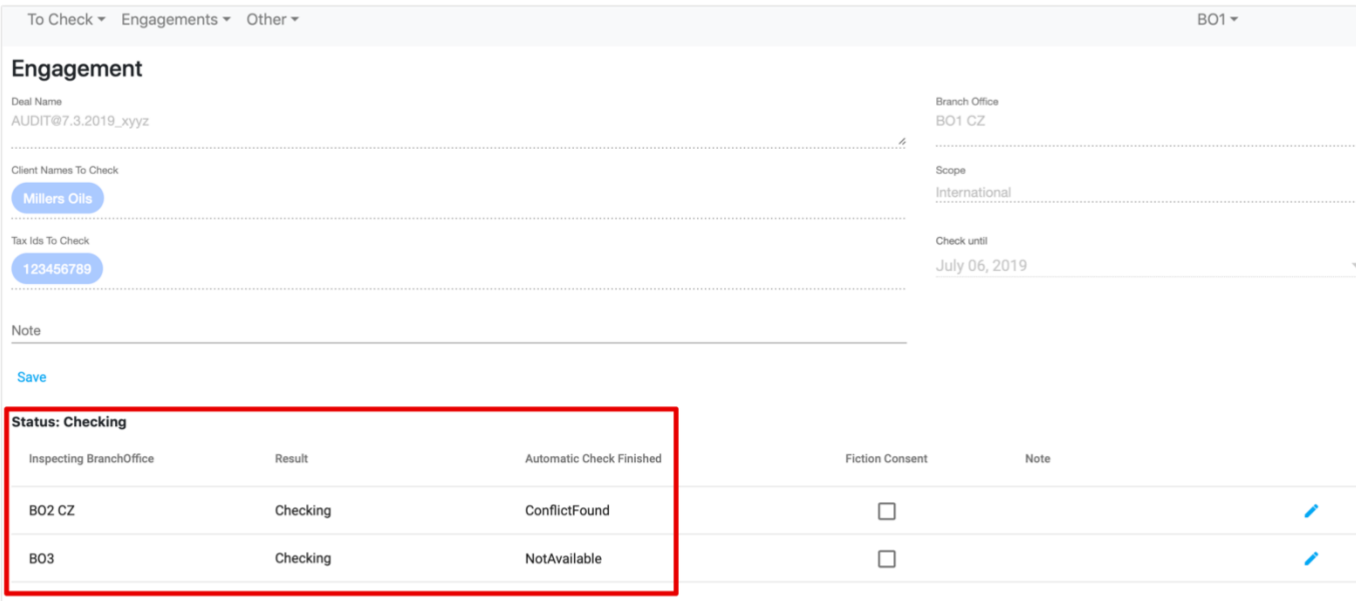
- Enter engagement deatils (put the Client name and Tax Id exactly, it will be used for Automatic Check. Automatic Check is feature for branch offices with imported / entered clients. This feature doesn't require manual check or confirmation.
- Select scope (International means Transnational audit ALL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



- You can see or check new engagement.



- Engagement check detail.



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_xyyz

noreply
Marek Smrček
středa 3. července 2019 11:26
Zobrazit podrobnosti

report.pdf
54,9 kB

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.

ECOVIS®

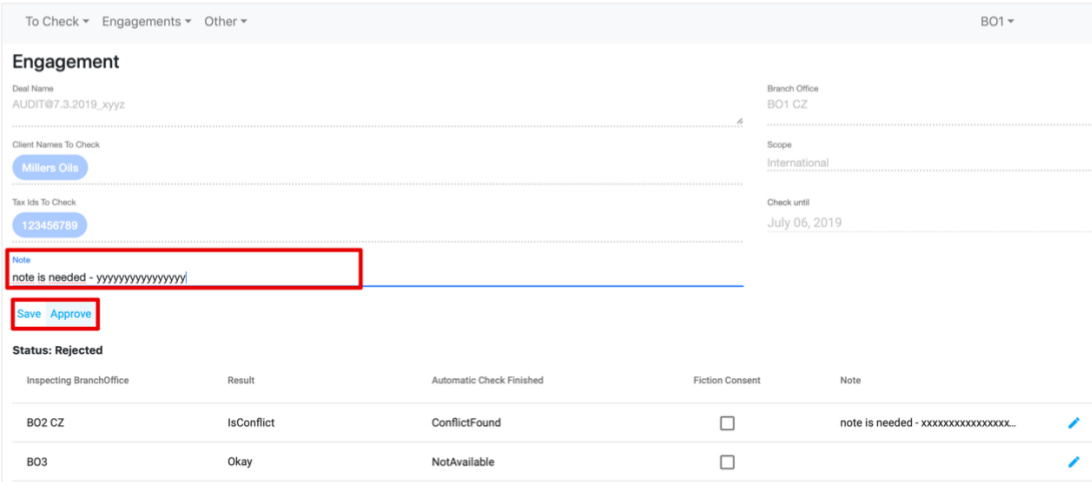
Engagement Check Results   Status: Rejected

Deal Name:	AUDIT@7.3.2019_xyyz	Check Until:	July 06, 2019
Branch Office:	BO1 CZ		
Clients to Check:	Millers Oils		
Tax Ids to Check:	123456789		

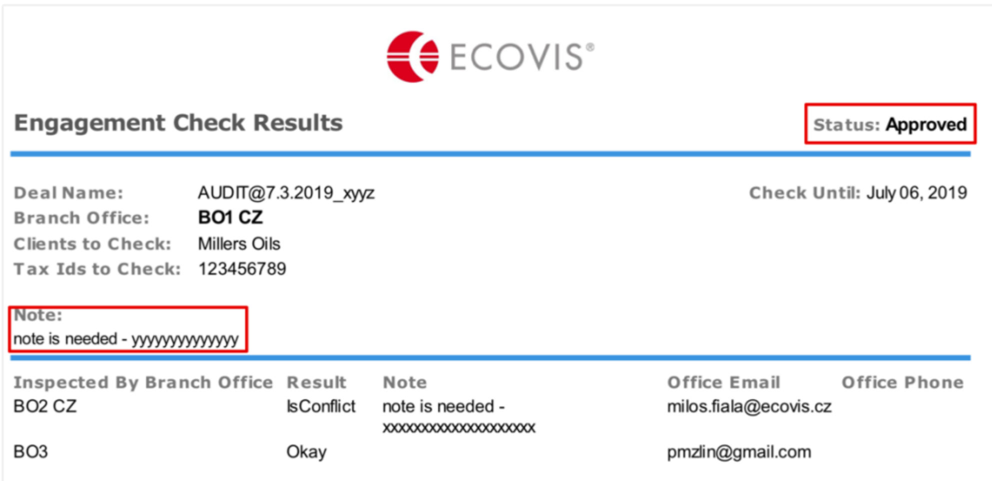
Inspected By Branch Office	Result	Note	Office Email	Office Phone
BO2 CZ	IsConflict	note is needed - xxxxxxxxxxxxxxxxxxxx	milos.fiala@ecovis.cz	
BO3	Okay		pmzlin@gmail.com	

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.



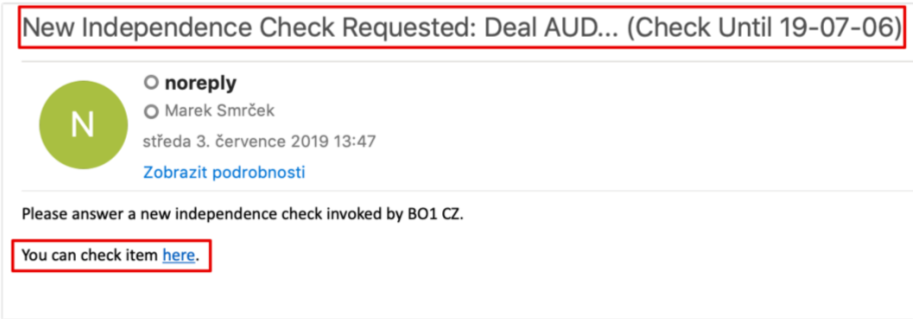
- You will receive new notification with report.
- Engagement check result - changed to approved.



2. Check procedure

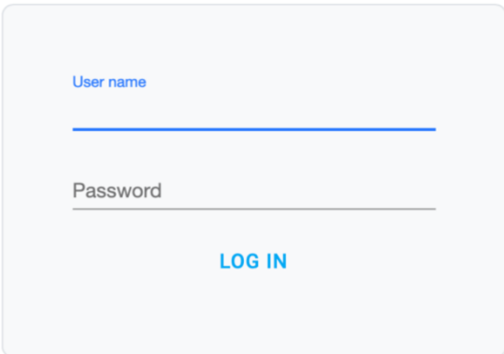
2.1. You will receive an email requesting your action

- Click on link to log in AURE.IND.



2.2. LOG IN

- Please enter your username and password.



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.

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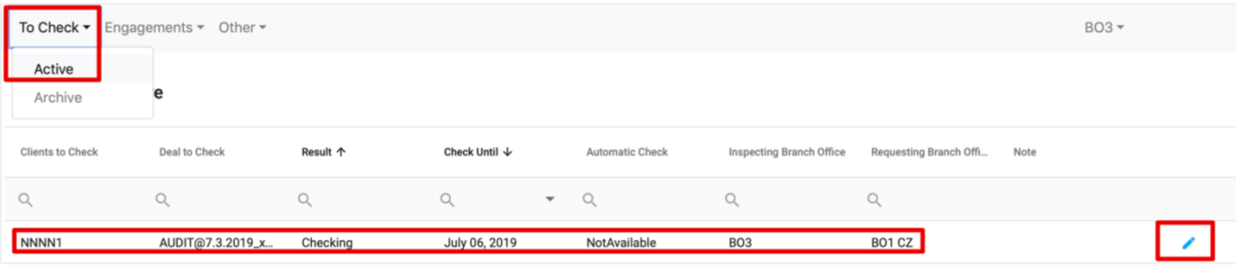
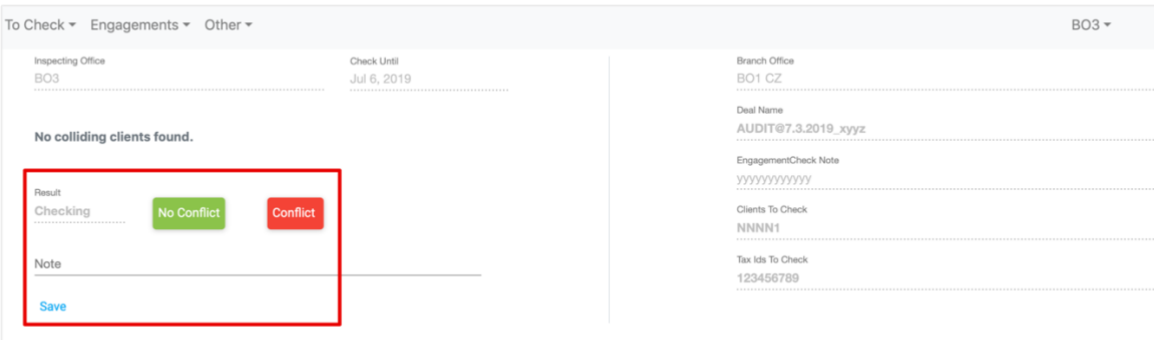


2.4. Select your option

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



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

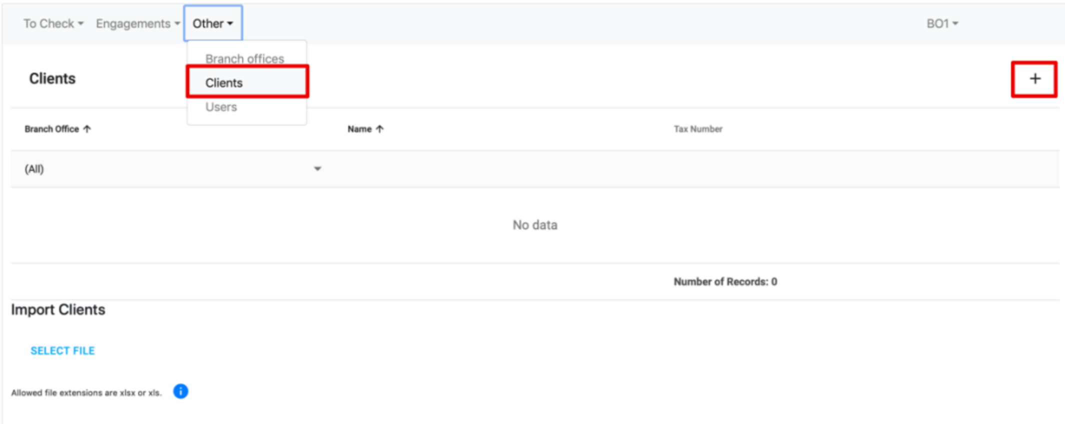
3.1. Edit Branch office details

- 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.

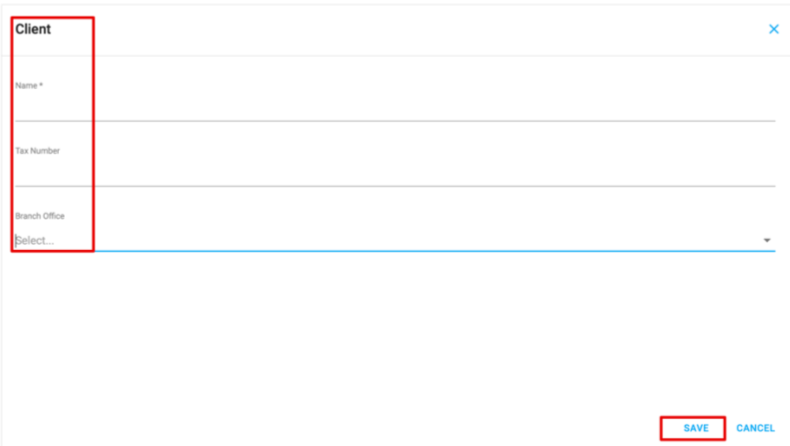
3.2. Clients

3.2.1. Manually add a new client

- Use "plus" to add a new client.



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



3.2.2. Import Clients

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

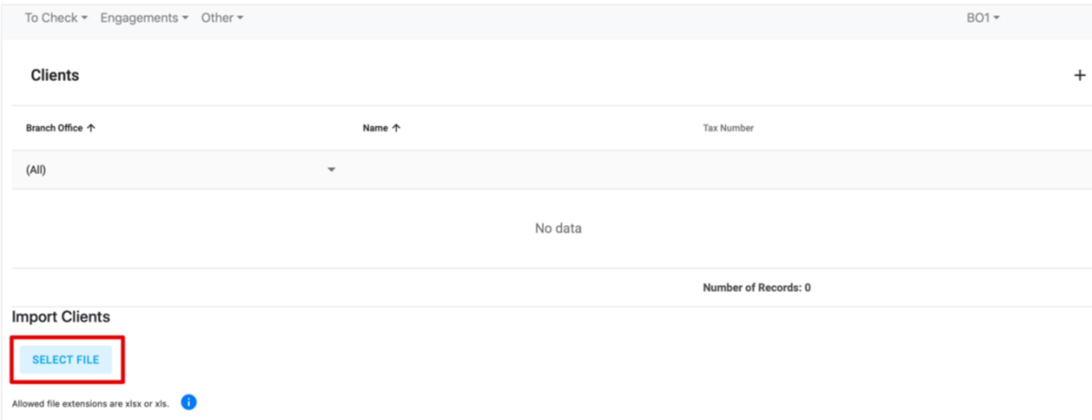
Info

	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)

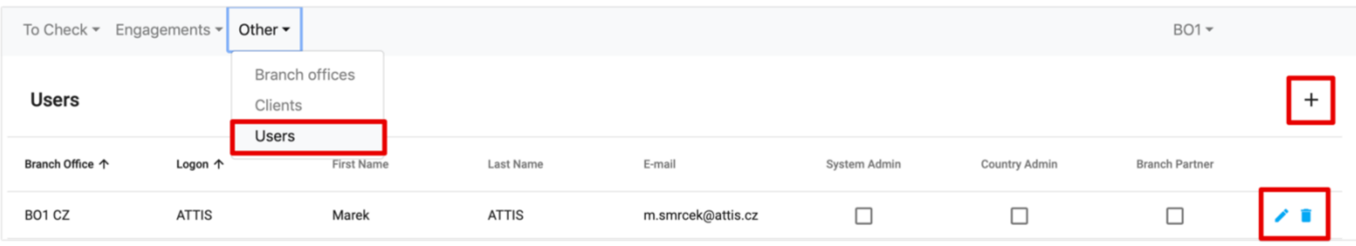
- Excel structure is mandatory (Tab 1)
- Only first sheet is imported
- First row is header and is ignored
- Empty rows are skipped
- Rows with both empty TaxNumber and Name are ignored
- Rows with invalid BranchOfficeId are ignored
- Information about BranchOfficeId is in BranchOffice Detail

- Use button SELECT FILE and import your new clients.

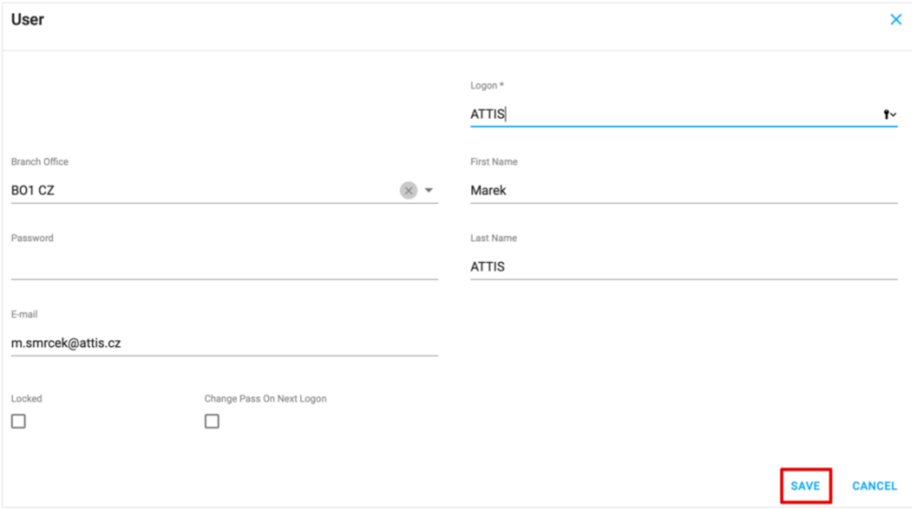


3.3. Users

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



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



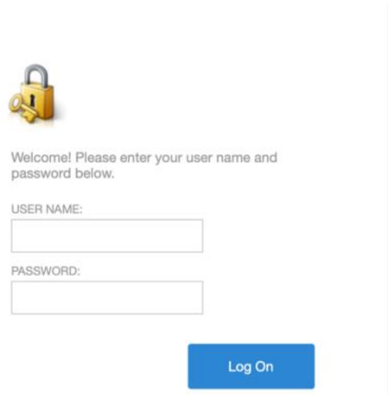
4. Help Desk

4.1. Support for end users

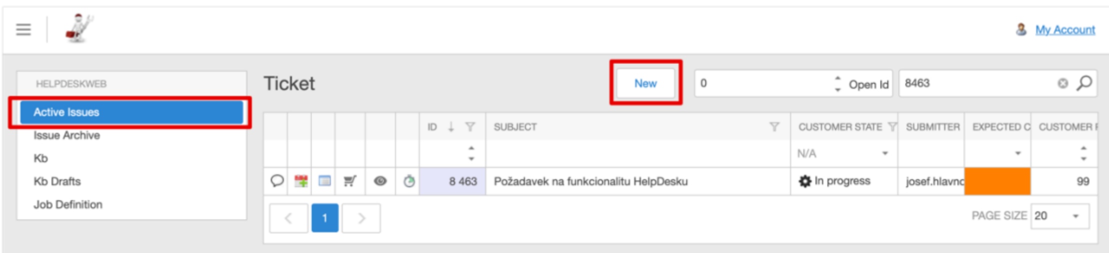
- Please contact you local support: link

4.2. AURE.IND support

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



4.2.1. Create new ticket



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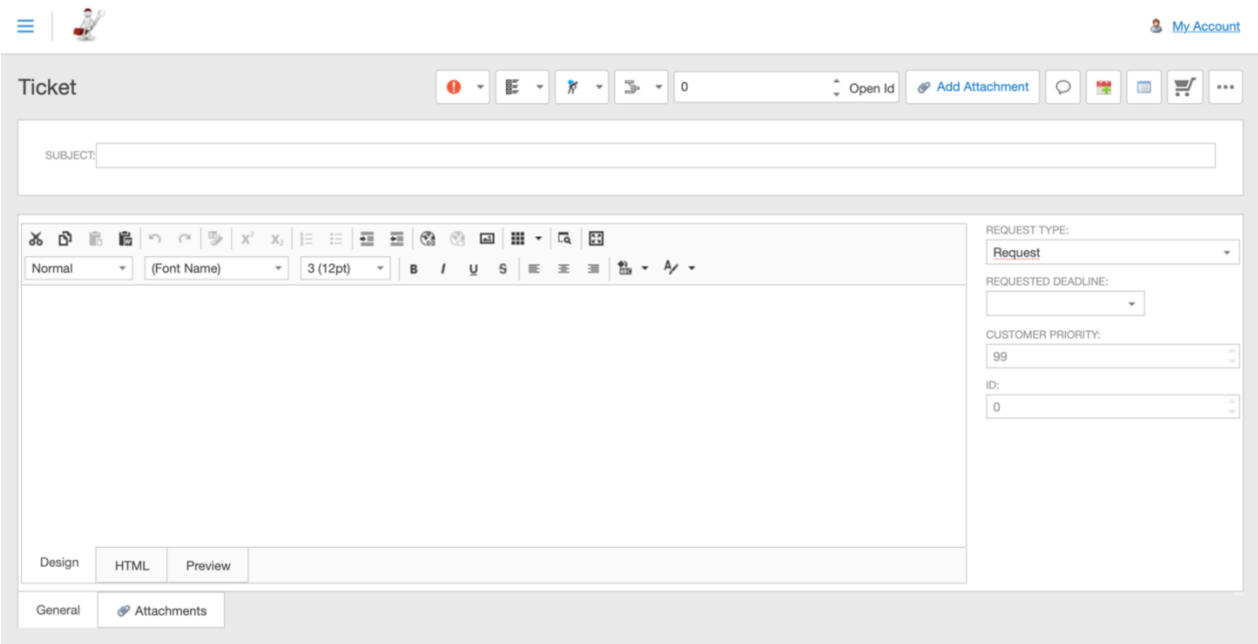
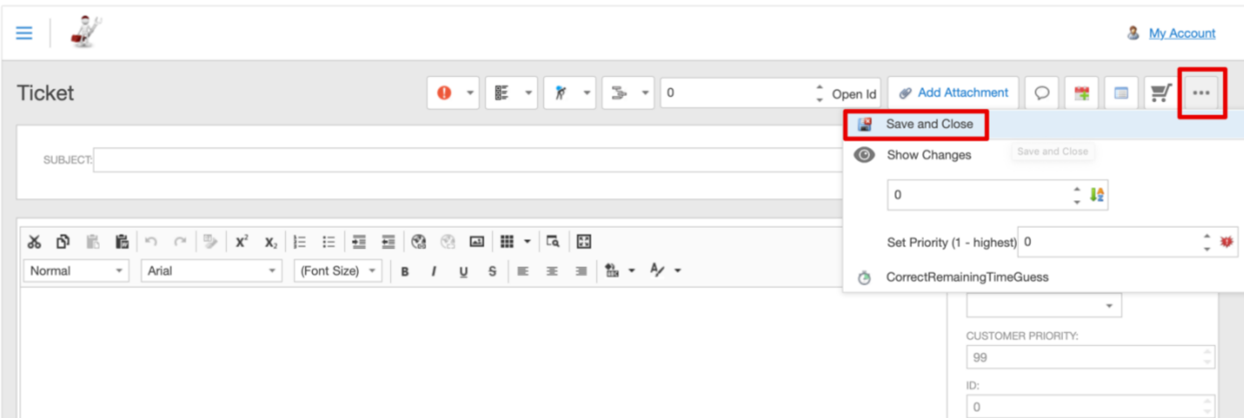
- Please fill ticket form:
  - Subject
  - Description
  - Optionally – High, Low or Medium priority
  - You can Add Attachment
  - Select request type – Bug or Request
  - Requested deadline



- Save and Close.



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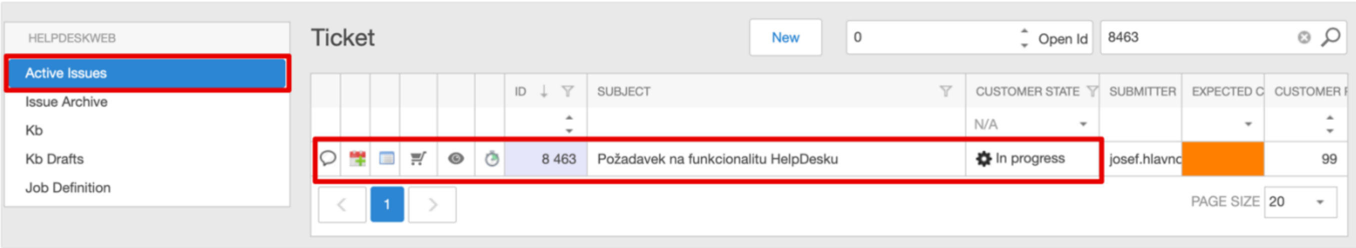
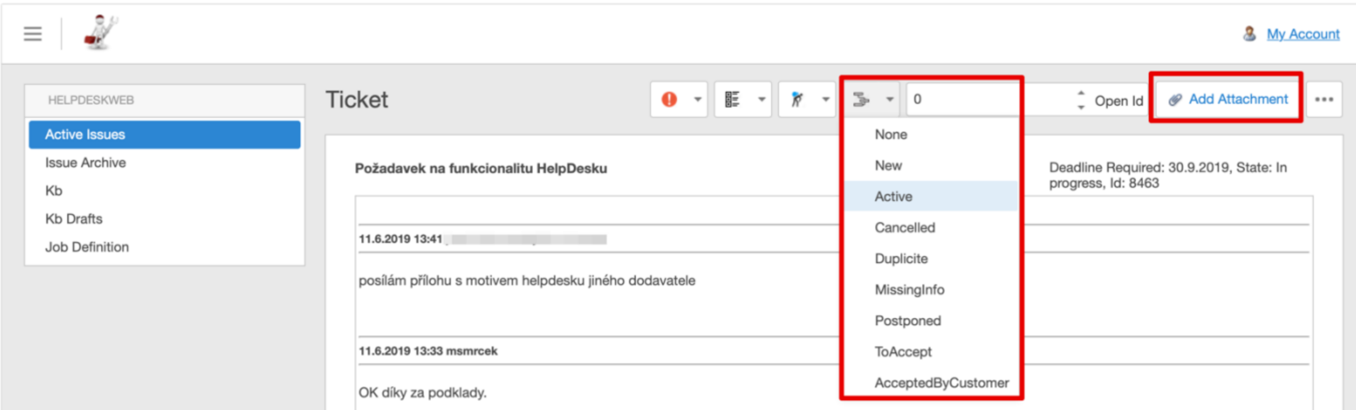
4.2.2. Active Issues

- Click on selected ticket.



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



- You can add new comment.