

Supervisor Functionality

Audit firms can appoint one or more Supervisors to oversee usage on Confirmation.

This provides the firm with a central user who has the ability to oversee all office activity and manage users and clients. To assist in billing and administration Supervisors have access to all client profiles created by auditors from their office(s) and can reassign work where needed.

1 The 'Administration' Tab

Supervisors gain access to the 'Administration' tab, providing firms with the ability to oversee their office activity and manage users and client profiles.



2 Reports

There are 13 different reports available in Confirmation allowing you to track all requests and results for your firm/office. Of the 13 reports, seven are standard reports available to auditors, with the other six requiring Supervisor access. To run a report you need to:

1. Select your report from the dropdown menu
2. Set your report filter(s)
3. Click 'View' to generate results
4. If desired, click 'Export' to download report

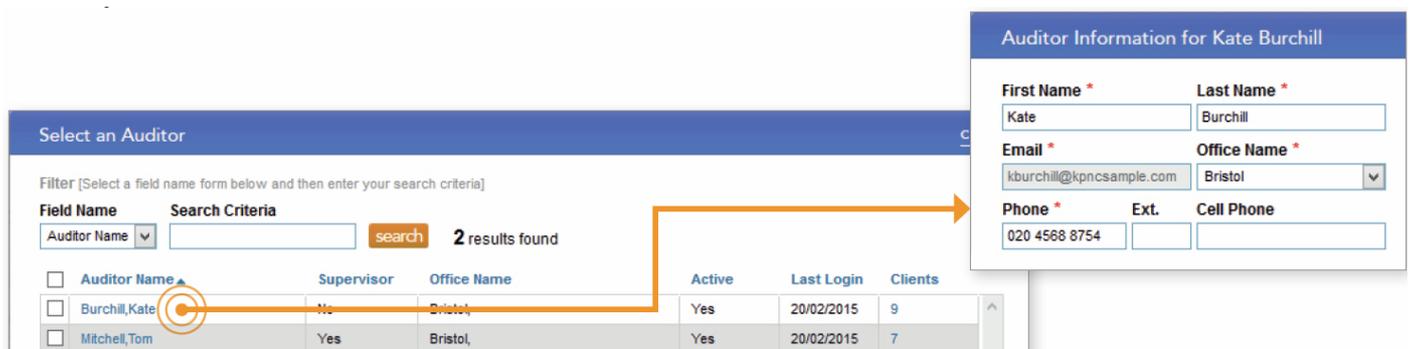
Key reports include:

- **In- Network Responders** - Used to search and locate available responders.
- **Office Activity Report** - Used for client billing reconciliation purposes. Auditors submitting confirmations can also be encouraged to include an 'Engagement Number' (i.e. client charge code) to assist facilitate the reconciliation process.
- **Client Detail** - Used as a complete listing of existing client profiles at your firm.

3 User Management

Use the 'Edit Auditor' button from the 'Action Links' section on the 'Administration' tab to view and edit users.

You can view individual user client lists, and also deactivate users that have left your office.



The screenshot shows the 'Select an Auditor' interface. A search filter is applied to 'Auditor Name' with the criteria 'Burchill, Kate', resulting in 2 results found. The table below shows the search results:

Auditor Name	Supervisor	Office Name	Active	Last Login	Clients
Burchill, Kate	No	Bristol	Yes	20/02/2015	9
Mitchell, Tom	Yes	Bristol	Yes	20/02/2015	7

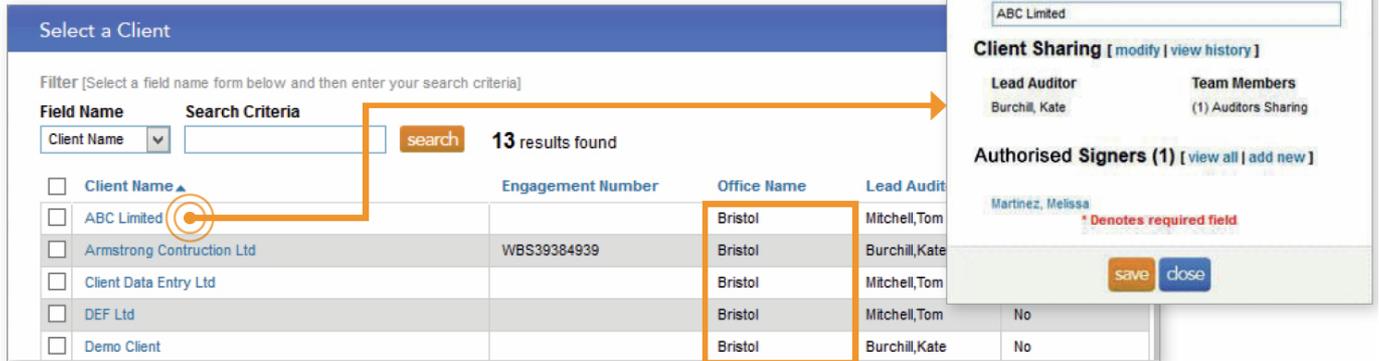
An orange arrow points from the 'Burchill, Kate' row to a pop-up window titled 'Auditor Information for Kate Burchill'. The pop-up contains the following information:

- First Name: Kate
- Last Name: Burchill
- Email: kburchill@kpncsample.com
- Office Name: Bristol
- Phone: 020 4568 8754
- Ext.:
- Cell Phone:

4 Client Management

Use the 'Manage Clients' button from the 'Action Links' section on the 'Administration' tab to view and edit clients.

You can edit the client name, manage auditor access and edit signatories.



The screenshot shows the 'Select a Client' interface with a search filter set to 'Client Name' and search criteria 'ABC Limited'. A table lists 13 results. An orange circle highlights the 'Client Name' column header, and an orange arrow points from it to the 'Edit Client Profile' modal. The modal shows the 'Company Name' field with 'ABC Limited' entered, 'Client Sharing' information (Lead Auditor: Burchill, Kate; Team Members: (1) Auditors Sharing), and 'Authorised Signers (1)' (Martinez, Melissa). A red asterisk indicates a required field. 'save' and 'close' buttons are at the bottom.

Field Name	Search Criteria	Engagement Number	Office Name	Lead Auditor
<input type="checkbox"/> Client Name				
<input type="checkbox"/> ABC Limited			Bristol	Mitchell, Tom
<input type="checkbox"/> Armstrong Contruction Ltd		WBS39384939	Bristol	Burchill, Kate
<input type="checkbox"/> Client Data Entry Ltd			Bristol	Mitchell, Tom
<input type="checkbox"/> DEF Ltd			Bristol	Mitchell, Tom
<input type="checkbox"/> Demo Client			Bristol	Burchill, Kate

5 Next steps

If you would like to appoint a Supervisor for your office, please complete a Supervisor Setup Form and return to Asia Pacific Customer Support at support@apac.confirmation.com.