

AUVENIR

5.3 Release Notes

Auvenir 5.3 Release Notes

We're pleased to bring you the latest release of the Auvenir platform. Read on to learn more about the exciting additions in our latest release 5.3.

What's in This Release:

- ✓ New copy engagement feature
- ✓ New non-digitized working papers uploaded into your engagements
- ✓ New enhancements to PBC manager
- ✓ New enhancements to Auvenir analytics tool
- ✓ Auvenir launches new content guide for the US market

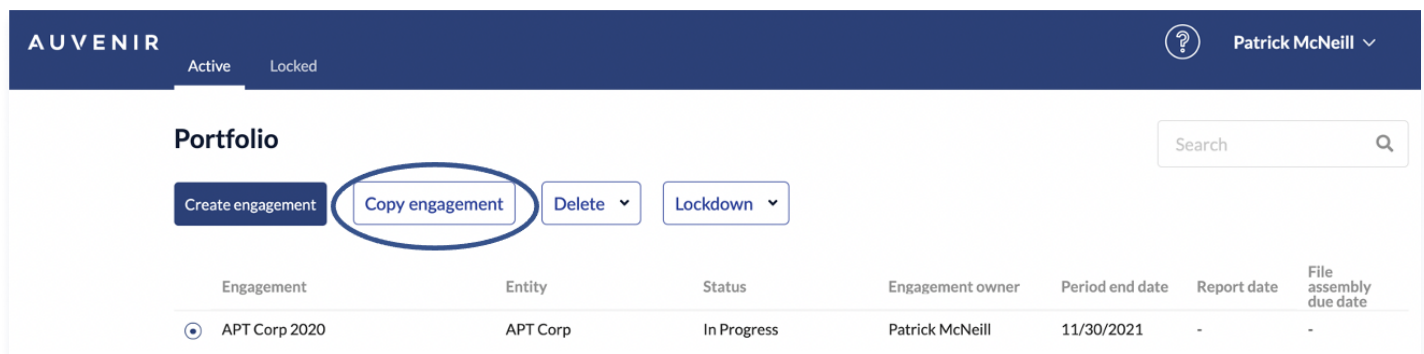
Copy engagements feature

The Skinny:

This powerful feature allows you to copy an engagement from your portfolio list to reuse large portions of the content in other engagements to save you time.

Features:

Do you have multiple clients in a specific industry? Copy a recently completed engagement and create an industry template. Reuse industry analysis and other common elements to get a head start on your next engagement for that industry.



The screenshot shows the Auvenir user interface. At the top, the 'AUVENIR' logo is on the left, and a user profile 'Patrick McNeill' with a dropdown arrow is on the right. Below the logo, there are tabs for 'Active' and 'Locked'. The main section is titled 'Portfolio' and includes a search bar. Below the search bar, there are four buttons: 'Create engagement', 'Copy engagement' (which is circled in blue), 'Delete' with a dropdown arrow, and 'Lockdown' with a dropdown arrow. Below these buttons is a table with the following columns: Engagement, Entity, Status, Engagement owner, Period end date, Report date, and File assembly due date. The table contains one row with the following data: Engagement: APT Corp 2020, Entity: APT Corp, Status: In Progress, Engagement owner: Patrick McNeill, Period end date: 11/30/2021, Report date: -, and File assembly due date: -.

Engagement	Entity	Status	Engagement owner	Period end date	Report date	File assembly due date
APT Corp 2020	APT Corp	In Progress	Patrick McNeill	11/30/2021	-	-

Include Non-digitized working papers within your engagements

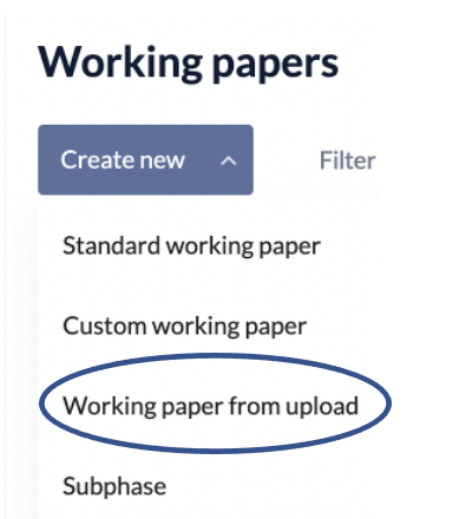
The Skinny:

You can now include working papers from Microsoft tools such as Word, Excel, and PPT directly within your Avenir engagements. We call these non-digitized working papers because they have not been through our proprietary digitization process.

Features:

Do you have a process that is already mapped out within a Microsoft tool such as Word, Excel, or PPT? Easily upload it directly into your engagement file to save time and effort. Edit those documents inside Avenir with our built-in SharePoint connection.

There are some restrictions on the use of these working papers, such as the ability to use Avenir common tools. Refer to the guide document for more details.



PBC Manager enhancements

The Skinny:

Auvenir has added a batch import feature as well as a consolidated daily notifications email to both auditor and client and added a PBC request status to your engagement dashboard.

Features:

- Download our convenient PBC request template, fill it in, and upload it to send a standard list of data requests to clients.
- During the progress of your engagement email notifications of new, updated, or overdue data requests will be sent once per day to team members and clients to keep things on track and ensure you have the data you need to complete your analysis.
- Email notifications are only sent when new or updated requests have been added. All requests are consolidated into a single email to manage the number of client notifications.
- Data request and status view have also been added to your engagement dashboard for easy review and updates.

The screenshot displays the Auvenir engagement dashboard for APT Corp 2020. The user is Patrick McNeill. The dashboard shows the following engagement status:

- Engagement status:** Period end date: 11/30/2021, Auditor's report date: -
- PBC requests - Status:**
 - New - (50%): 2
 - Ready for review - (25%): 1
 - Follow up - (25%): 1
 - Completed - (0%): 0
- PBC requests - Overdue:**
 - New - (67%): 2
 - Follow up - (33%): 1

Auvenir enhances its analytics common tool

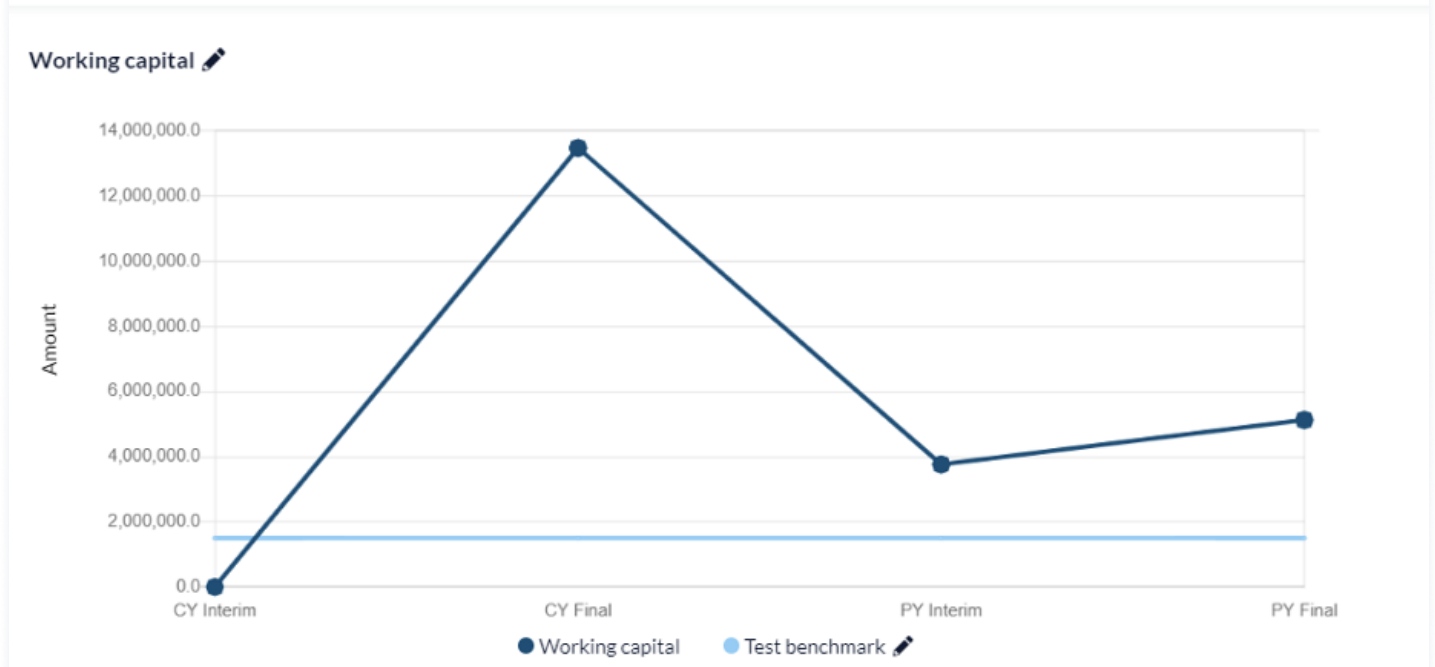
The Skinny:

Add analytics directly within your working papers. We've started with ratio analysis, but we're far from done!

Features:

- Create analytics from your trial balance data to add powerful visualizations directly in-context anywhere inside your engagement working papers.
- Add as many as 2 current and 20 historical trial balances to your engagement file to provide a trend analysis of up to eleven years.
- Add industry benchmarks to further enhance your analysis.

Review visualization



Auvenir enters the US market with comprehensive US Content Guide

The Skinny:

US users can now join the Auvenir platform with our new US Content Guide - <https://na.auvenir.com/assets/legal/auvenir-and-us-content-authors>. The system contains built-in tailoring questions to ensure you get only the content you need to fit the size and requirements of your engagement.

Features:

- Your Auvenir Pro subscription combined with the US Content Guide contains four custom workflows including a Guided Audit Workflow, Guided Review Workflow, Guided Compilation Workflow, and a Guided Preparation Workflow.
- The US Content Guide, authored by Dr. Mark S. Beasley and Dr. Randy Elder, is based on the [Audit and Attest and Compilation and Review Standards published by the AICPA](#).
- Auvenir integrates tailored questions directly in the platform to ensure you get the right content for your engagement, the moment you need it.
- All templates are fully customizable, designed to give you full control to tailor engagements to your clients' needs.