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Audit Firms role management tutorial



Audit Firms

An organisation becomes an external audit firm for the EC as soon as the audit service contract is signed, and the signatory is granted the role of Primary External Auditor.

This section covers the different Audit firm specific roles and how to manage those in the Funding & Tenders Portal, as well as how to manage teams and assign audits to them.

For details on the rest of roles of the organisation needed for grants or procurement contracts with the EC see Roles and access rights.

For information about the Business Process steps to be followed by external auditors, please see O utsourced audit - steps for audit firms.

The overview of the existing roles for the organisation are listed in the **Organisation Roles** tab in the portal: access **Manage My Area**, **My organisations** and select **View Roles** within **Actions** on the right, you arrive to the organisation **Roles** tab.

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O GRANTS 🗸											
My Proposal(s)										_	ł.
My Project(s)	Details Roles Projects Pro	posais									
My Formal Notification(s)	Results: 1		O Down	load excel list				Q Search.			l
	ROLE ¢	NAME ¢	EMAIL \$	USERNAME \$	TEAM \$	ACCOUNT DATA CHA	NGE DATE 💠	PROJECT (PROPOSAL)	٠		
	LEAR	Tom Petty	tom.petty@kpmg.com	npet		n.a					
	Primary External Auditor	Tom Petty	tom.petty@kpmg.com	npet		n.a					
	Primary External Auditor	JJ Cale	jjcale@kpmg.com	ncal		n.a					
	External Auditor	Eric Clapton	eric.clapton@kpmg.com	ncla	H2020_TEAM	n.a					
	Audit Team Member	John Mayall	john.mayall@kpmg.com	nma	H2020_TEAM	n.a					
	Audit Team Member	John Lee Hooker	johnlee.hooker@kpmg.com	nhos	H2020_TEAM	n.a					
	External Auditor	Jeff Beck	jeff.beck@kpmg.com	nbec	COSME_TEAM	n.a					
	Audit Team Member	Jimmy Page	jimmy.page@kpmg.com	npaş	COSME_TEAM	n.a					
	External Auditor Administrator	Robert Plant	robert.plant@kpmg.com	npla		n.a					
	Account Administrator	David Gilmour	david.gilmour@kpmg.com	ngilr		n.a					
	Edit Organisation Roles			н ≪ 1 ≫ н [10 -						l
	≣ Back										I
		© 2018 European Cor	nmissiop About Freetext search	I IT Helpdesk Coo	kies I Lenal Notice	APIs	Y., Y				

Each audit must be assigned to a Team. Audit firms may set up multiple Teams. The Team functionality gives the audit firm flexibility to organise and distribute audits within the firm to different groups of auditors. See Manage Teams.

Grant/revoke roles

To grant roles, go to Manage My Area / My Organisation(s) / Actions / View Roles. Click on Edit organisation Roles.

Details Roles	Projects Proposals	Teams					
Results: 6		Download exe	cel list			Q Search	
ROLE ¢	NAME ¢	EMAIL ¢	USERNAME \$	TEAM \$	ACCOUNT DATA CHANGE DATE \$	PROJECT (PROPOSAL) ID \$	PROJECT (PROPO ACRONYM \$
Audit Team Member	test test	nnoecas@gmail.com		DEFAULT	n.a		
External Auditor	Lorenzo	Lorenzo@ext.ec.europa.eu	uzjor	DEFAULT	n.a		
External Auditor Administrator	External Auditor	auditexter515@gmail.com	n003es9t		n.a		
Primary External Auditor	Jorge	Jorge@ext.ec.europa.eu	cruzj		n.a		
Primary External Auditor	External Primary Auditor	primaryexternalauditor@g	n003es9d		n.a		

To allocate a role:

1. Click on Add Roles.

Results: 6				Q Search.		Organisation: KPMG Advisory Ltd.
ROLE \$	NAME \$	EMAIL ¢	USERNAME ¢	TEAM \$	ACTIONS	PIC: 914556256
Audit Team Member	test test	nnoecas@gmail.com		DEFAULT	Ē	HU - 1134 Budapest Vaci ut 31.
Primary External Auditor	External Primary Auditor	primaryexternalaudit	n003es9d		۵.	

2. Select a role (the roles you are able to assign depend on the role assigned to you, see each Overview of Audit Firm Roles):

یڈی ہ	My Organisation(s) GRANTS V	Roles for the KPMC	the organisation: G		
1	My Proposal(3)				
	My Project(x)	Please enter the contact name a	Please choose I		ogenisation KPMG
ď	My Formal Notification(s)	FistName*	Perset Choose Primary External Auditor Enternal Auditor Enternal Auditor Enternal Auditor Audit Team Member		PC 990710013 P IV - 1000 Brownies Box de la Lie 28
		final *			
		 required field 		Canol	

3. Enter the first name, last name and the registered email address, and click **Ok** to save.

For the external auditor and the audit team member roles, an additional field will display where you can select a team. If the team is not available in the list, click on **+Add a new Team** and provide the name of the team (this option is available only for the primary external auditor and the external auditor administrator roles).

adas My Organisation(s) © 000015 ↓	Roles for the KPM	the organisation: G		
My Proposal(1)	Please enter the contact name a	end details External Auditor B	1	organization KPMG
🕂 My Formal Notification(1)	Team *	Prese choose Prese choose Prose choose Proce choose Proc		WESTREE WESTREE Rev de la Loi 25
	LastName *			
	 required field 		Gaved	

If the first or last name are not correct, but the email address is correct, the portal will automatically use the data as registered in EU Login. If the email address is not known, then, the user will be saved in the list of roles, but that person will receive an email to create an EU Login. You will differentiate this non-registered user from the rest because the username will remain empty in the **Roles** tab until the person finishes the registration.

My Organisation	Advisory Ltd.						
Details Roles	Projects Proposals	Teams					
Results: 5		Download ex	ccel list			Q Search	
ROLE ÷	NAME ¢	EMAIL ¢	USERNAME + 1	ream \$	ACCOUNT DATA CHANGE DATE \$	PROJECT (PROPOSAL) ID \$	PROJECT (PROPOSAL ACRONYM ¢
Audit Team Member	test test	nnoecas@gmail.com	> .	DEFAULT	n.a		
Primary External Auditor	Jorge	Jorge@ext.ec.europa.eu	cruzj		n.a		
Primary External Auditor	External Primary Auditor	primaryexternalauditor@g	n003es9d		n.a		
Edit Organisation Roles		И	1 ▶ H 1	10 ~			
≦ 1 Back							

To revoke a role, access the Roles Tab (Manage My Area / My Organisations / Actions / View Roles), click on Edit organisation Roles.

Details Roles	Projects Proposals	Teams				
Results: 6		Ownload exe	cel list		Q Search	
ROLE ¢	NAME \$	EMAIL ¢	USERNAME + TEAM +	ACCOUNT DATA CHANGE DATE ©	PROJECT (PROPOSAL) ID ¢	PROJECT (PROPOSA ACRONYM ¢
Audit Team Member	test test	nnoecas@gmail.com	DEFAULT	n.a		
External Auditor	Lorenzo	-Lorenzo@ext.ec.europa.eu	uzjor DEFAULT	n.a		
External Auditor Administrator	External Auditor	auditexter515@gmail.com	n003es9t	n.a		
Primary External Auditor	Jorge	Jorge@ext.ec.europa.eu	cruzj	n.a		
Primary External Auditor	External Primary Auditor	primaryexternalauditor@g	n003es9d	n.a		

1. Use the Bin icon to remove a role.

Results: 6				Q Search		_{Organisation:} KPMG Advisorv Ltd.
ROLE ¢	NAME \$	EMAIL \$	USERNAME \$	TEAM ¢	ACTIONS	PIC: 914556256
udit Team Member	test test	nnoecas@gmail.com		DEFAULT	Ê	♥ HU - 1134 Budapest Vaci ut 31.
rimary External uditor	External Primary Auditor	primaryexternalaudit	n003es9d		±	

2. In the following screen, click **Ok** to confirm the revocation of the role.

Roles for the organisation:	ry Ltd.			
The operation cannot be undone. Proceed?	NAME \$	EMAIL ¢	USERNAME +	organisation: KPMG Advisory Ltd.
Audit Team Member	test test	nnoecas@gmail.com		 ♥ HU - 1134 Budapest
The operation cannot be undone. Proceed?	K ∢ 1 >	₩ 10 ₩		Vaciut 31.
	Ok Ca	ncel		

External auditors and audit team members roles can also access the roles tab, but they will only have the possibility to remove/add other external auditors and audit team members to their own team.

	Europear Commiss	FU Single	nding & tende e Electronic Data Interchange	er opportuniti Area (SEDIA)	es		Welcome External Auditor (n003es9t)) 💿
≡ Mar	age my area	🕋 🛛 SE	ARCH FUNDING & TENDERS -	HOW TO PARTICIPATE 🔻	PROJECTS & RESULTS	WORK AS AN EXPERT SUPPORT 🔻	select programme	. 🌔
* . ∭		Roles for th	e organisation: B Advisory Ltd.					
ø	Please enter the cont	act name and o	details				Organisation:	
		Role *	Please choose		•			
		First Name *	External Auditor				 HU - 1134 Budapest 	
		Last Name *	Audit Team Member				Vaci ut 31.	
		Email *						
	* required field			_				
					Ok Cancel			

Granting/revoking external audit firm local auditor role

External auditors and audit team members can also grant the external audit firm local auditor role, which is granted at audit level, instead of at organisation level. Access via **Manage My Area / My Audits / Actions / View External Auditor Roles**.

			i <u>More ir</u>	fo		AL	
Results: 1						Q Search	l
PROCESS ID ¢	PROCESS TYPE ¢	LEGAL NAME ¢	PROGRAMME ¢	PHASE \$	BATCH \$	TEAM ¢	ACTION
TEST-TEST2-222	AUDIT	LIEGE AIR CARGO HANDLING SERVICES SA	H2020	CLOSED		Internal Security Fund I	Police (ISFP) Actio
		И 4	1 > > 10 ~				Access Audit View external auditor

Then, click Add Roles.

Results: 5				q	Search		KPING Advisory Ltd.		
OLE ¢	NAME \$	EMAIL \$	USERNAME \$	TEAM \$	ACTIONS		PIC: 914556256		
udit External Auditor	External Auditor	auditexter515@gmail.com	n003es9t	Internal Security Fund (ISFP)	Police		HU - 1134 Budapest Vaci ut 31.		
udit External Auditor dministrator	External Auditor Administrator	external.audit.adm@gmail	n003es9l						
idit Primary External iditor	External Primary Auditor	primaryexternalauditor@g	n003es9d						
idit Team Member at audit rel	External Audit Team Member	teammemberaudit2@gmail	n003esg8	Internal Security Fund (ISFP)	Police				
		H 4 1	▶ N 10 ¥						
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he only	possibili ^{the audit}	ty at aud	it level i	s to grai	nt the ex	terna	al audit f	irm loca	al auditor r
	POSSIDIII the audit. '2-LIEGE AIR CAR	ty at aud	it level is	s to grai	nt the ex	kterna	al audit f	irm loca	al auditor r
TEST	possibili the audit: '2-LIEGE AIR CAR	ty at aud	it level i s	s to grai	nt the ex	xterna	al audit f	irm loca	al auditor r
he only	possibili the audit: 12-LIEGE AIR CAR Ind details	ty at aud	it level i s services sa	s to grai	nt the ex	kterna	opputation: PPMG Advisory Ltd. PC E 1959250	irm loca	al auditor r
Terms	the audit: 2-LIEGE AIR CAF Inceal Auditor Internal Security Fund Police	ty at aud RGO HANDLING •	it level i s services sa	s to grai	nt the ex	kterna	Organisator: KPMG Advisory Ltd. Prc 9155555 9 Pt 11 13 Budgest 9 Pt 11 13 Budgest	irm loca	al auditor r
A contract of the contract of	possibili the audit 2-LIEGE AIR CAR Ind details Local Auditor Internal Security Fund Police of Pieter	ty at aud RGO HANDLING *	it level i s services sa	s to grai	nt the ex	kterna	al audit f al advisory Ltd. Prc 91455255 9 HU - 1134 Busineent Wat uf 31.	irm loca	al auditor r
the only A close for TEST ase enter the contact name as Role * Test Test Test Test Test Test Test Test Test Test Test	possibili the audit: "2-LIEGE AIR CAF Internal Security Fund Police of Pieter Smidt	ty at aud RGO HANDLING •	it level i s	s to grai	nt the ex	kterna	Cognicator: KPMG Advisory Ltd. PC 9155255 9 FBL-1134 Budgest Marcu J.	irm loca	al auditor r
And the second s	possibilit the audit: '2-LIEGE AIR CAR Ind details Local Auditor Internal Security Fund Police (Pieter Smidt Indecatiogrammi Loot:	ty at aud RGO HANDLING •	it level is	s to grai	nt the ex	kterna	Cognitication: KPMG Advisory Ltd. nc ortalogo nc ortalogo Net 1132 Buddipent Wale 1037.	irm loca	al auditor r
A constraint of the second sec	the audit: 12-LIEGE AIR CAR Indetails Local Auditor Internal Security Fund Police (Pieter Smidt Incode Softymus Local	ty at aud RGO HANDLING • (SEP)	it level is SERVICES SA	s to grai	nt the ex	kterna	al audit f oppositetion: PC 9155555 Vec 9155555 Vec 0131	irm loca	al auditor r

idits / Actions / View nis role can be removed when accessing via My Audits)

				Q Search.		organisation: KPMG Advisory Ltd.
LE ÷	NAME +	EMAIL +	USERNAME +	TEAM \$	ACTIONS	PIC: 914556256
dit External Auditor	External Auditor	auditexter515@gmail.com	n003es9t	Internal Security Fund Police (ISFP)		HU - 1134 Budapest Vaci ut 31.
dit External Auditor ministrator	External Auditor Administrator	external.audit.adm@gmail	n003es9l			
lit Primary External litor	External Primary Auditor	primaryexternalauditor@g	n003es9d			
lit Team Member at audit I	External Audit Team Member	teammemberaudit2@gmail	n003esg8	Internal Security Fund Police (ISFP)		
al Auditor	test test	nnoecas@gmail.com		Internal Security Fund Police (ISFP)	Ê	
		H (1	▶ H 10 ¥			
Add roles						
	k Ok to c	confirm.				
nen clic						
nen clic						

Roles for the audit:	ARGO HANDLING SERVICES SA			
The operation cannot be undone. Proceed?				Organisation:
ROLE *	NAME +	EMAIL ¢	USERNAME +	PIC: 914556256
Local Auditor	test test	nnoecas@gmail.com		HU - 1134 Budapest
	H 4 1 + H 10 -			vacrut 31.
The operation cannot be undone. Proceed?				
	Ok Cancel			

Manage Teams

Only the primary external auditor and the external auditor administrators can add/rename/remove the teams of an organisation.

Go to Manage My Area / My organisations, and then click on Actions / View Roles.

My Organisation(s)			Online ma "Register in the Partic	nual Sipant Register"	IT HOW TO "Participant Register"
	i <u>Mo</u>	re info			
Results: 1				Q Search	
LEGAL NAME *		PIC ¢	VAT ¢	STATUS \$	ACTIONS
KPMG Advisory Ltd.		914556256	HU12691908	DECLARED	Actions 😋
R 4 1	▶) 10	~			View Roles Audit Management
Do you want to continue the registration of your organisation to receive a PIC?	t finalica it - vour	organization has n	not received a DIC num	nervet - vou will not he al	Ve to see it above in the
In you started the registration or your organisation in the Commission register some time add, but during section My organisations. Please continue its registration by clicking on the button that leads you to the manual.	registration tool.	. You may check th	e information that will b	be necessary for the regis	tration in the user
CONTINUE	REGISTRATION				

Access the **Teams** tab:

_2	My organisation CENTRE NATIONAL DE	LA RECHERCHE SCIEN	TIFIQUE 1 Meetado		
(I) My Formal Notification(s)	Details Roles Projects Proposals Tea	ms			
	NAME 0				ACTIONS .
	AUDIT_2019_H2020 Team member list				
	Audit Contact	88 King	bb.king@crvs.com	8	C Actions *
	Audit Contact	Jim Monison	jim.morrisson@cnrs.com	8	
	AUDIT_2018_COSME				OC Actions *
	Add a new team		H et 1 H 10 *		

If you did not manage the Teams of your firm yet, you will see a "Default" team. You can rename it via **Actions** / **Rename**

My Organ KPM	^{sation:} G Advisor	y Ltd.					
Details Roles	Projects	Proposals	Teams				
Results: 1							
NAME						ACTIONS	
DEFAULT						Actions	•
						Rename Team	
Add a new team						nuu nolea	

The Team field becomes editable now. Provide the new name and click on the tick icon to confirm, or or the cross to cancel.

etails Roles	Projects	Proposals	Teams		
esults: 2					
AME					ACTIONS
Internal Security Fun	d Police				
ilot Projects and Prep	aratory Actions (F	PPPA)			Actions 🖧

To create a new team, click on **Add new team**.

etails Roles Pro	pjects Proposals	Teams		
esults: 2				
AME				ACTIONS
ternal Security Fund Police (IS	SFP)			Actions of
ilot Projects and Preparatory A	Actions (PPPA)			Actions
	_			

When creating a team, you will need to assign either an external auditor or an audit team member role to it. Select one of those roles, enter the name of the team and provide the details of the person. Click **Ok** to confirm the creation.

tails Roles	Projects Prop	osals	Teams									
ase enter the contact n	ame and details											
Role *	External Auditor		÷									
New Team Name *	Pilot Projects and Pre	paratory Ac	tions (PPPA)									
First Name *	External											
Last Name *	Auditor											
Email *	auditexter515@gmail.	com										
quired field												
			Ok	Cancel								
display	the cur	rent	t mer	nber	s of the	e team,	click	c on ^r	the ar	row	on f	the
display	the cur	rent	t mer	nber	s of the	e team,	click	c on ⁻	the ar	row	7 on 1	the
My organisatio KPMG A ails Roles	the cur Advisory Ltd Projects Prop	rent osals	t mer	nber	s of the	e team,	click	c on ^r	the ar	row	on 1	he
display My organisatio KPMG A ails Roles utts 2	the cur Tr Advisory Ltd Projects Prop	osals	t mer	nber	s of the	e team,	click	c on ⁻	the ar	row	on 1	the
display My organisatio KPMG A tails Roles muts 2 ME	the cur Advisory Ltd Projects Prop	osals	t mer	mber	s of the	e team,	click	c on ^r	the ar	row	ON 1	the
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My Organisatio KPMG A talls Roles sutt: 2 sutt: 2 cean member list cxternal Auditor	the cur T: Advisory Ltd Projects Prop ce (ISFP)	osals osals	t mer	nber	s of the	e team,	click	c on ·	the ar	/ / [CTIONS	the

You can remove assignees using the bin icon. Please note, the last external audit role of the team can be revoked if no audit is assigned to this team, otherwise, you are not able to remove it from the team members. When a team does not contain members, it disappears from the list of teams.

You can assign more team members via Actions / Add Roles.

≣ Back

My Organisat KPMG	on: Advisory Ltd.				
Details Roles	Projects Proposals	Teams			
Results: 2					
NAME					ACTIONS
Internal Security Fund P	blice (ISFP)				Actions
Team member list					Rename Team Add Roles
External Auditor	External Au	ditor	auditexter515@gmail.com	Ŵ	
Add a new team					
elect the	e role, enter	the deta	ils and click	on Ok to co	nfirm.
My Organisat KPMG	on: Advisory Ltd.				
Details Roles	Projects Proposals	Teams			
Please enter the contact	name and details				
Role ¹	Audit Team Member	\$			
Team	Internal Security Fund Police //S	ED)			

First Name * Team Last Name * Member Audit Email * teammemberaudit2@gmail.com * required field Ok Cancel

_____ Back

You can also assign additional team members directly when allocating an external auditor or an audit team member role. See Grant/revoke roles.

External auditors and audit team members roles can also access the teams tab, but they will have only the possibility to remove/add other external auditors and audit team members to their own team. They cannot add teams nor rename the existing ones.

tails Roles Projec	ts Proposals Teams			
suits: 2				
AME				ACTIONS
ernal Security Fund Police (ISFP)				Actions
				Add Roles
Feam member list				
eam member list	External Audit Team Member	teammemberaudit2@gmail.com	ê	

Assign an audit to a team

This action is done by a primary external auditor or an external auditor administrator (see Overview of Audit Firm Roles). Go to Manage My Area / My Audits.

The audits assigned to the external audit firm will be listed here.

My Audit(s)					Online manual "Audits"	T HOW TO "Audits"
			i <u>More info</u>				
Results: 2						Q Search.	
PROCESS ID ¢	PROCESS TYPE ¢	LEGAL NAME ¢	PROGRAMME \$	PHASE ¢	BATCH ¢	TEAM O	ACTION 0
TEST-TEST1-111	AUDIT	POLYTECHNEIO KRITIS	H2020	CLOSED		unassigned	Action 📽
TEST-TEST2-222	AUDIT	LIEGE AIR CARGO HANDLING SERVICES SA	H2020	CLOSED		Internal Security Fund Police (ISFP)	Action 📽
		н ч	▶ H 10 ¥				
Please choose audit team 🗸	Assign a team to the selected audits						

When an audit has not been assigned to a team yet, you will see "unassigned" under the **Team** column. Click on the left of the audit and select the team from the drop-down list.

(iii) My Audit(s)					Online manual "Audits"	T HOW TO "Audits"
			i More info				
Results: 2						Q Search	
PROCESS ID +	PROCESS TYPE \$	LEGAL NAME ¢	PROGRAMME +	PHASE \$	BATCH \$	TEAM ¢	ACTION +
TEST-TEST1-111	AUDIT	POLYTECHNEIO KRITIS	H2020	CLOSED		unassigned	Action 🕸
TEST-TEST2-222	AUDIT	LIEGE AIR CARGO HANDLING SERVICES SA	H2020	CLOSED		Internal Security Fund Police (ISFP)	Action 🗞
		н∢	1 > H 10 ¥				
Please choose audit team v	Assign a team to the selected audits						
(ISFP) Pilot Projects and Preparatory Actions (PPPA)							

Click **Assign a team to the selected audits**. You can assign several audits to the same team at the same time.

(i) My Audit(s)							Online manual "Audits"	T HOW TO "Audits"	
				i <u>More info</u>					
Res	uits: 2						Q Search		
	PROCESS ID +	PROCESS TYPE ¢	LEGAL NAME ¢	PROGRAMME +	PHASE \$	BATCH \$	TEAM ¢	ACTION \$	
	TEST-TEST1-111	AUDIT	POLYTECHNEIO KRITIS	H2020	CLOSED		unassigned	Action 🛇	
	TEST-TEST2-222	AUDIT	LIEGE AIR CARGO HANDLING SERVICES SA	H2020	CLOSED		Internal Security Fund Police (ISFP)	Action 🕸	
	H 4 1 > H 10 V								
P	Pilot Projects and Preparatory Actions (PPPA) v Assign a team to the selected audits								

If you want to create a new team, you need to do it either in the Teams tab of your organisation (see Manage Teams):

My Organisation: KPMG Advisory Ltd.	
Detalls Roles Projects Proposals Teams	
Results 2	
NAME	ACTIONS
Internal Security Fund Police (ISFP)	Actions oc
Pilot Projects and Preparatory Actions (PPPA)	Actions oc
Add a new team	
음 Back	

Or you can also create a new team when allocating an external auditor or an audit team member roles by selecting **+Add a new Team** in the team field (see Grant/revoke roles).

a d ₂ My Organisation(s) © GRANTS ✓	Roles for KPM	the organisation: G		
() My Proposal(1) () My Proposal(2)	Please enter the contact name a	and details		organisation. KPMG
My Formal Notification(s)	Team *	Prese choose 8 Prese choose Robot Provide Robot Provide Robot Robot Robot Robot Robot Robot Robot Robot Robot Robot Robot Robot Robot Robot Robot Robot Robot Robot Robot Robot Robot Robot Robot Robot Robot Robot Robot Robot Robot Robot Robot Robot Robot R		BE - 1000 Brundt Rac de la Loi 28
	LetName *			
	 required field 		Cancel	

Access the Audit Management System

External auditors / audit team members access **My Audits**, within **Manage my Area**. You will see only the audits assign to the team they are members of, but not all the audits of the firm.

From there, you click on the **Actions** button next to the audit and select **Access Audit**. This will launch the Audit Management System (AMS) for the concerned organisation.

European Commissi	Funding & tenc	ler opportunitie ge Area (SEDIA)	S			1	Welcome External Auditor (n	003es9t) 🕡 🕫
≡ Manage my area	A SEARCH FUNDING & TENDERS	HOW TO PARTICIPATE PRO	UECTS & RESULTS WORK AS AN EXPERT	SUPPORT 🔻				select 🏭 🔎
ழக் My Organisation(s)	(III) My Audit(s	s)						
My Audits		- /		i More info			· Auura	Audito
My Formal Notification(s)								
	Results: 1				Q Search			
	PROCESS ID +	PROCESS TYPE +	LEGAL NAME ¢	PROGRAMME +	PHASE +	BATCH ÷	TEAM ¢	ACTION +
	TEST-TEST2-222	AUDIT	LIEGE AIR CARGO HANDLING SERVICES SA	H2020	CLOSED		Internal Security Fund Polic	e (ISFP) Action 0
			H 4	1 > H 10 ¥			V	ew external auditor roles

Overview of Audit Firm Roles

Role	Who is this?	Duties and system rights	Additional information
Primary External Auditor	Signatory in the audit firm of the audit service contract with the EC, who automatically receives this role when the audit is launched.	Manages (grants/revokes) all the roles /teams/persons representing their organisation for Audit assignments in My Audits . The first primary external auditor acquires automatically the External Auditor role and rights.	This role is automatically granted and it is also automatically nominated as an external auditor. There may be more than one primary external auditor.
External Auditor	Main contact person(s) appointed by the external audit firm to manage the audit assignments under the audit service contract in line with the provisions of the contract.	Has full viewing/editing/ submission rights on audits assigned to their team. Responsible for the quality of the documents submitted to the EC. Can interact via the interface with the auditee and the EC. Grants/revokes these roles within their team: other external auditors external audit team Members local auditor	A team needs at least one external auditor. External auditors are nominated/revoked by: other external auditors in the same team primary external auditors external auditor administrators There may be one or more external auditors in a team.
External Auditor administr ator	Person in the audit firm that is responsible for the administrative tasks such as managing accesses and roles within their audit firm.	Manages (grants/revokes) all the roles /teams/persons representing their organisation for Audit assignments in My Audits . Does NOT have any rights to view /edit/submit audit documents on individual audits.	Administrators are granted/revoked by primary external auditors or other external auditor administrators. There may be none, one or more external auditors administrators in an audit firm.
Audit Team Member	Support auditor that can assist the external auditor.	Has rights to access the audit process documents to assist in any auditor task, but can NOT submit or complete the auditor task. Grants/revokes other audit team members or external local auditors to their team.	Audit team members can be granted/revoked by all roles except external audit firm local auditors. There may be none, one or more audit team members assigned to a Team.
External Audit Firm Local Auditor	Auditor tasked with individual assignments for the audit firm.	Has full viewing/editing/ submission rights on specific tasks with the audited beneficiary. Can upload documents but cannot submit documents to the EU. Can communicate directly with the auditee via the Audit Management System.	External audit firm local auditors roles are granted/revoked by audit team members or by external auditors at audit level, and not at organisation level as the rest of roles (see Granting /revoking local auditor role) . They do NOT have the right to grant/revoke other roles. There may be several external audit firm local auditors granted for an individual audit.