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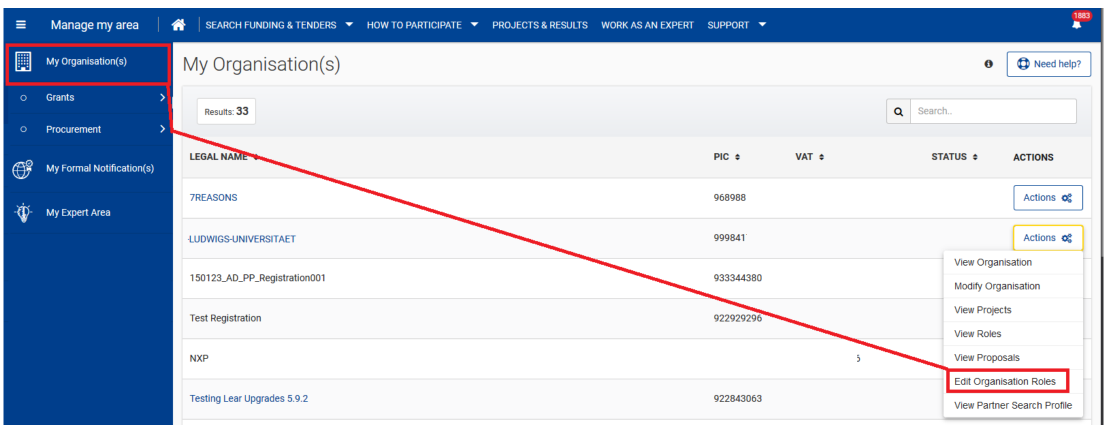
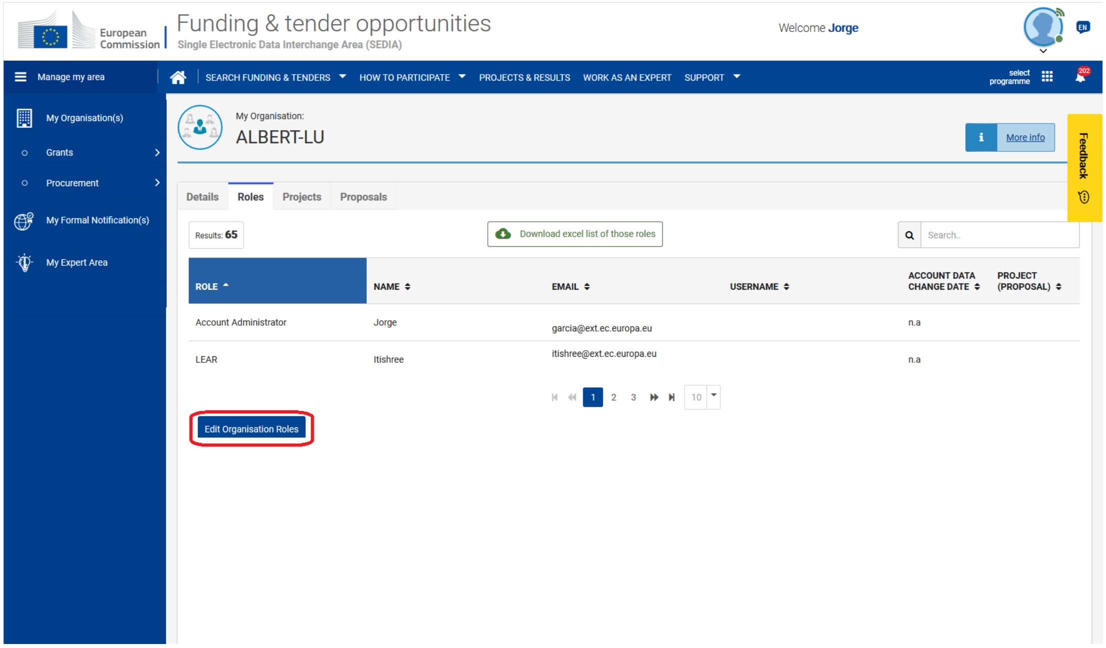
Organisation Roles

1. Go to the Funding and Tenders Portal **My Area – My Organisations** and click on **Actions** . Select **Edit Organisation Roles** in the list of actions.

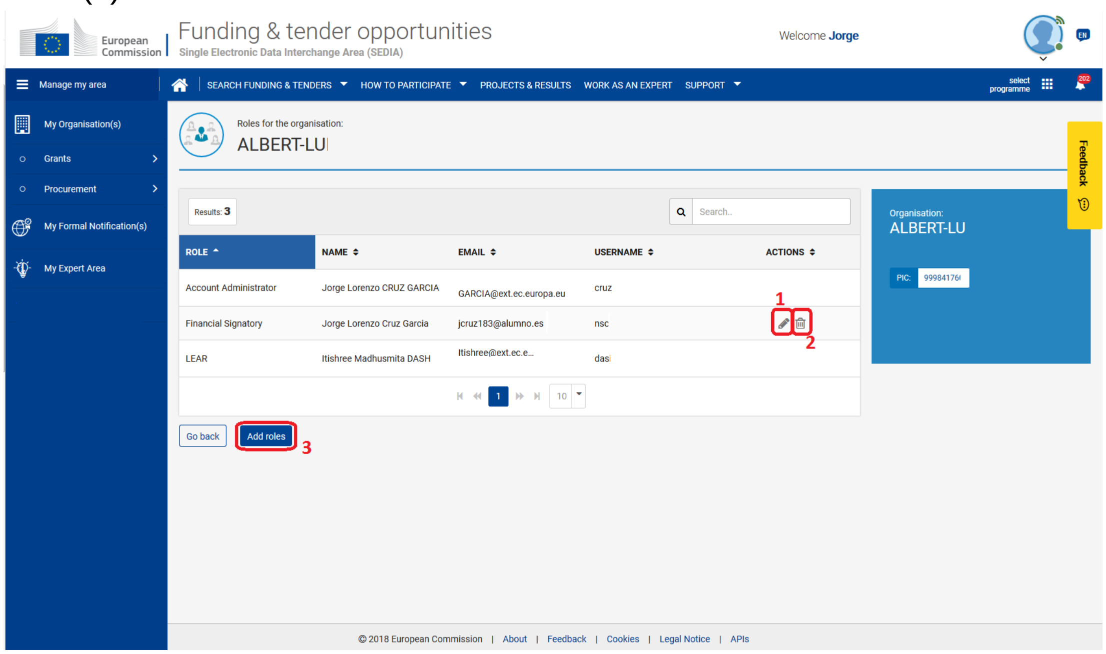


Edit Organisation Roles displays both for validated organisations and for recently registered organisations. When the organisation has been validated already, you have an additional option in the menu, **View Roles**, which takes you to a screen with filters. You will also have the possibility go to the **Roles for the organisation** screen from there.

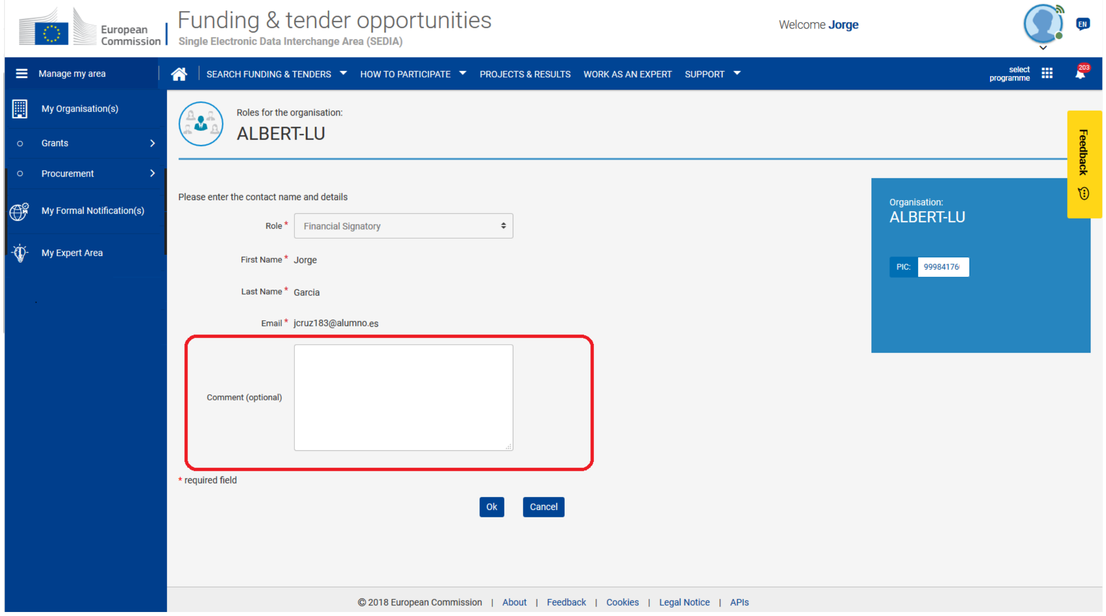
2. The **Roles for the organisation** screen appears displaying the existing roles.



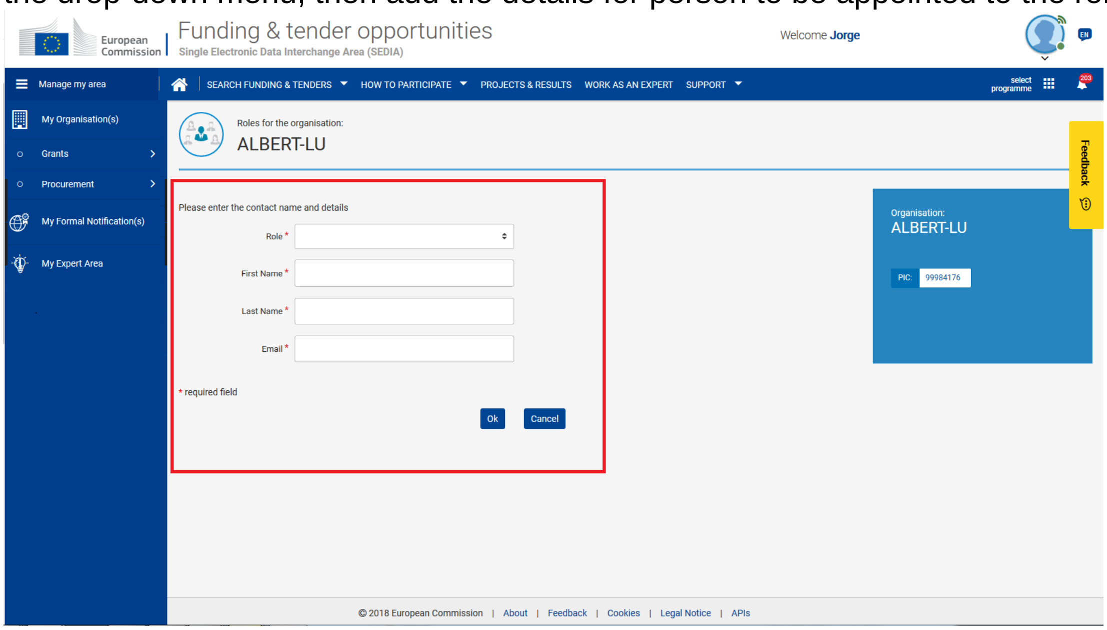
3. Click **Edit Organisation Roles**. In the new window, you can edit (1), revoke (2) or add new roles (3).



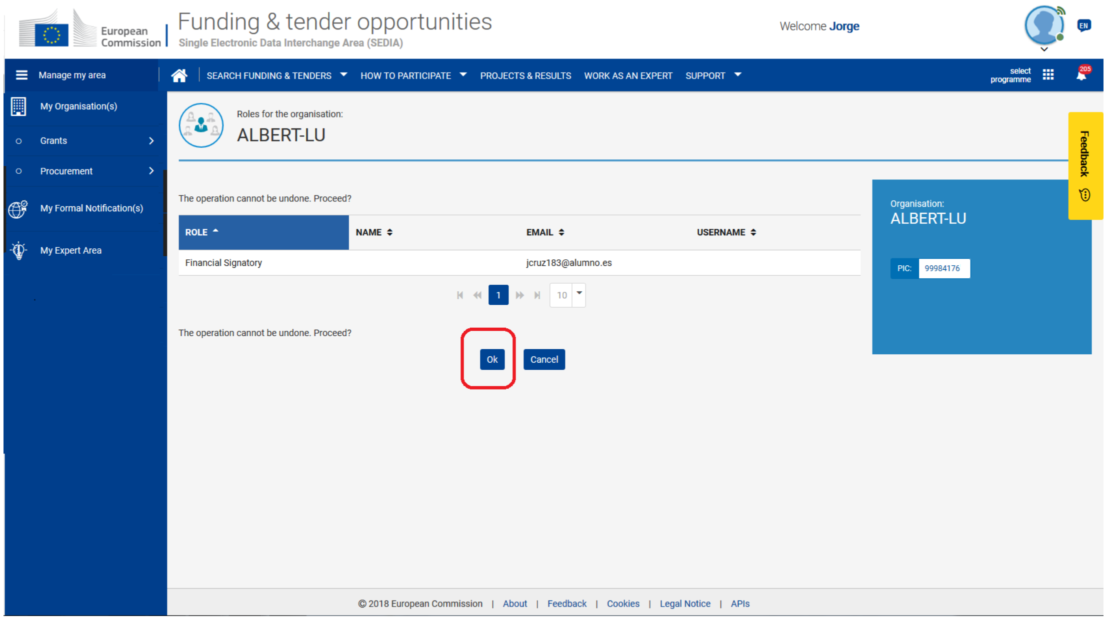
4. The pencil icon (**Edit)** is used to provide comments about the role. For example, that a certain FSIGN should be appointed as the Project Financial Signatory (PFSIGN) only for certain types of projects. The comment is visible when assigning the PFIGN/LSIGN to a project (see P LSIGN/PFSIGN below).



5. Click **Add Roles** to add a role. The **Add Role** screen appears. Select a role to be added from the drop-down menu, then add the details for person to be appointed to the role.

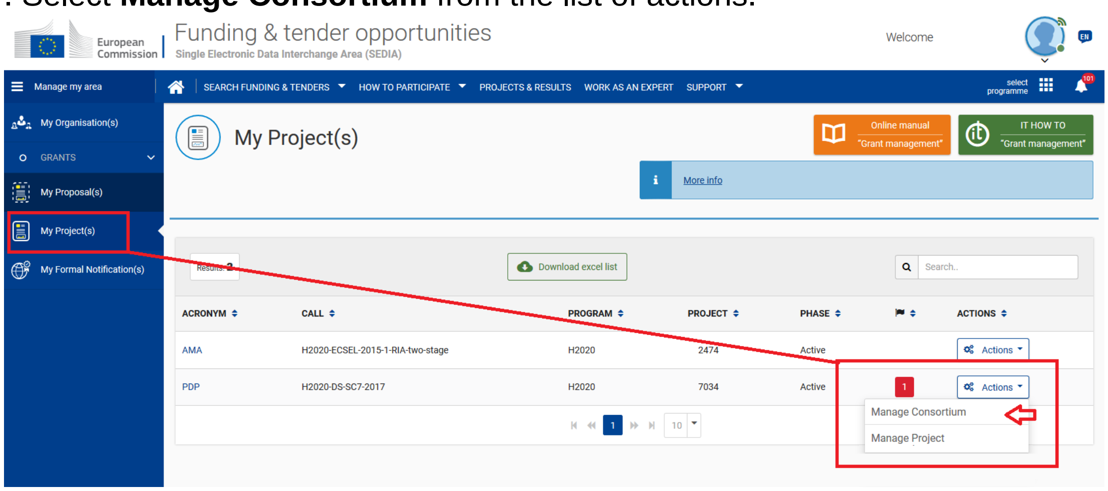


6. To revoke a role, click the bin icon close to the relevant role in the **Roles for the organisation** screen. In the second screen, click **OK** to confirm.

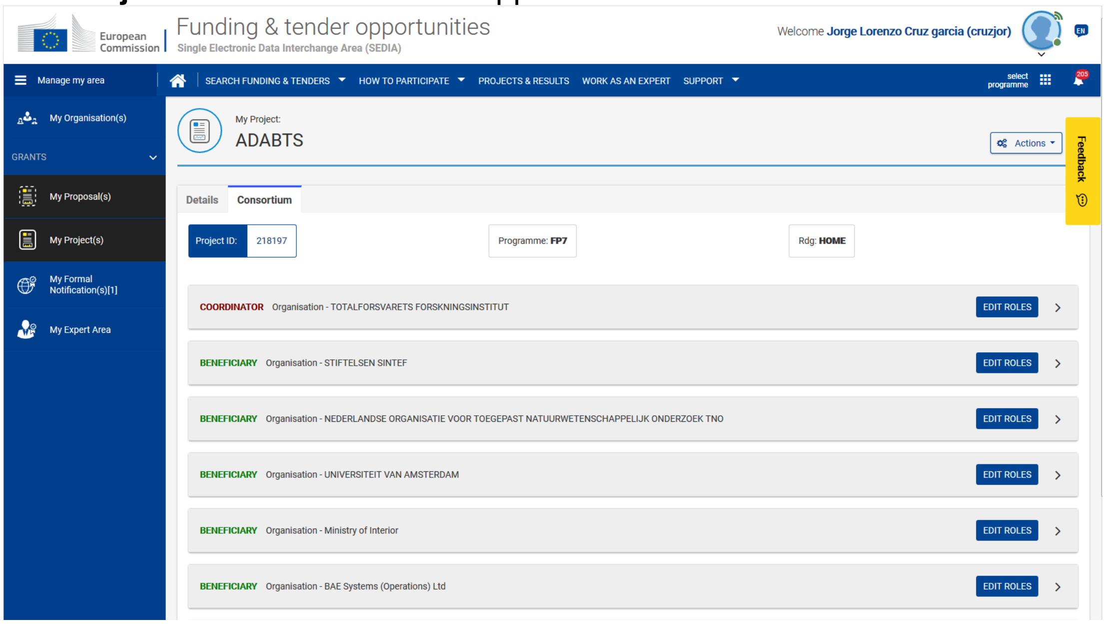


Project Roles

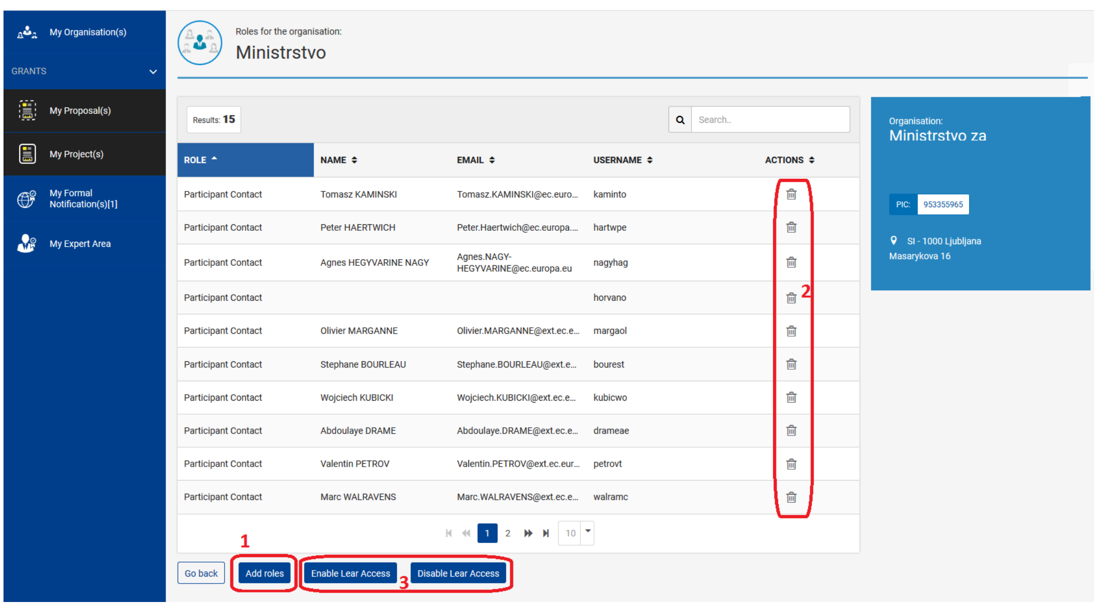
1. Go to the Funding & Tenders Portal **My Area** – **My Projects** and click on the **Actions** button . Select **Manage Consortium** from the list of actions.



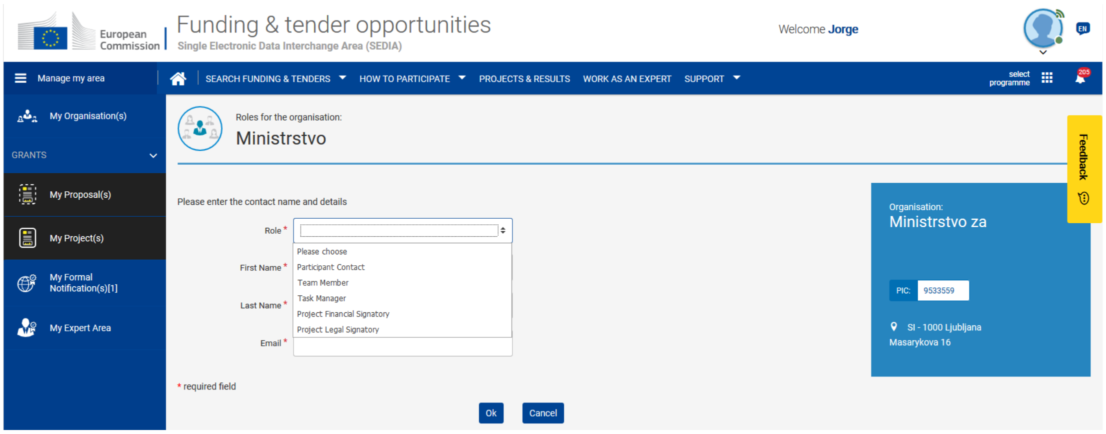
2. The **Project Consortium** screen appears.



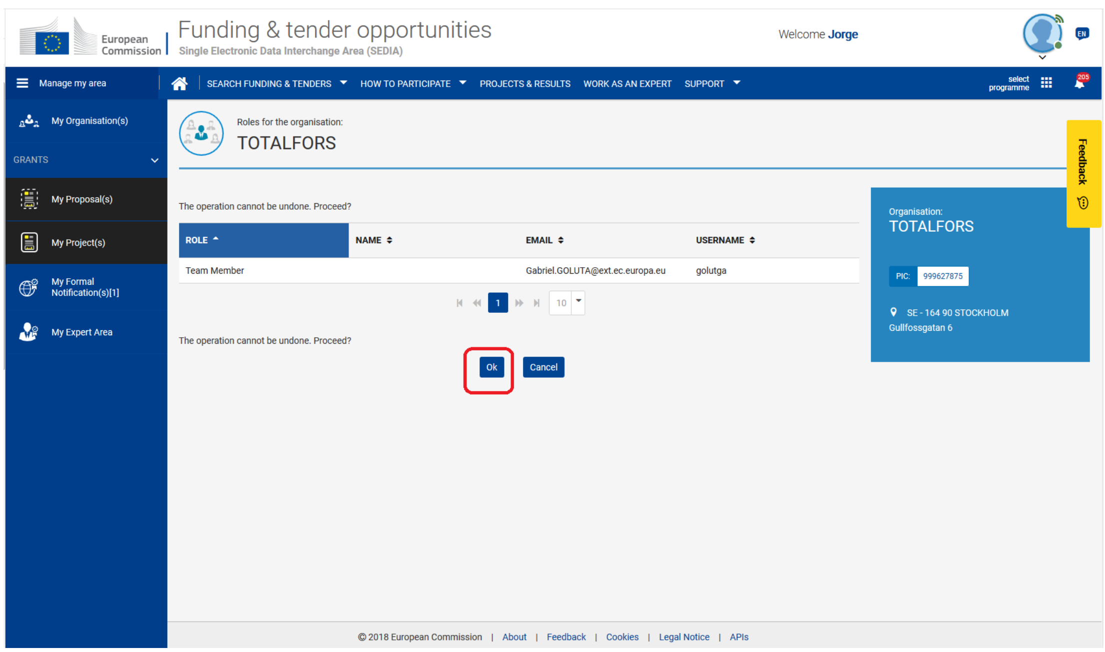
3. Click the **Edit roles** button next to the appropriate project contact organisation. The **Roles** for that organisation within the **Project** appear listed in a new screen. You can add (1) or revoke (2) roles of your organisation. As a coordinator contact also the option to grant or remove read access to the LEAR of the organisation displays (3, click here for further details).



4. Click the **ADD ROLES** button to add a role. The **Add Role** screen appears. Select a role to be added from the drop-down menu, then add the d etails for person to be appointed to the role .



5. To revoke a role, click the bin icon next to the contact to be removed, then click the **OK** in the following screen to confirm.

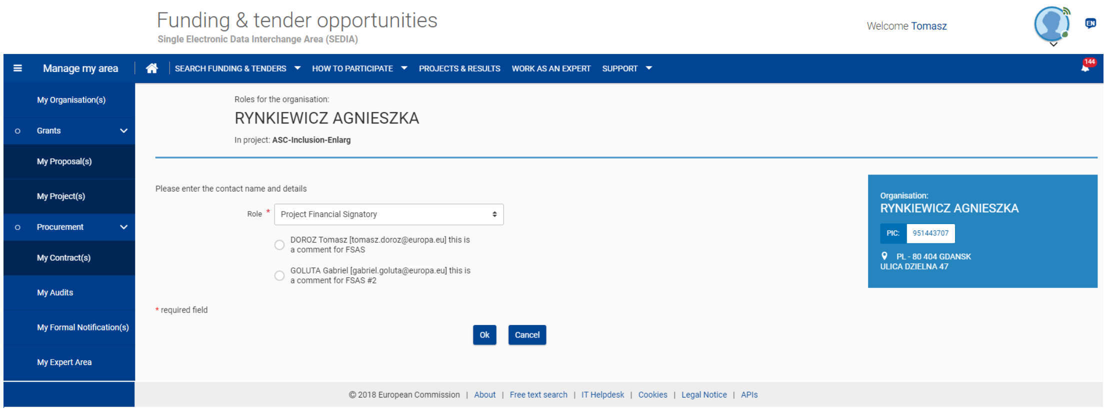


PLSIGN/PFSIGN

The Lear needs to set up a LSIGN/FSIGN to the organisation first. Once that this is done, you follow the same steps as when adding roles to a project, but when selecting this kind of role, the appointed LSIGNs/FSIGNs for the organisation will be listed for you, and you select one for the project by clicking on the radio button and confirming the selection via the **OK** Button.

The names which are listed correspond to the LSIGN / FSIGNs that the LEAR defined at level of the organisation

Note that when LEAR added a comment for the LSIGN / FSIGN, it will display after the email address.



Check also this **FAQ** specifically for PLSIGN / PFSIGN assignment.

LEARs and PLSIGN/PFSIGN

A prerequisite to assign a PLSIGN / PFSIGN is to allocate the LSIGN / FSIGN role in the organisation first. This action is to be done by a LEAR or Account Administrator of the organisation.

However, when assigning a PLSIGN / PFSIGN, LEARs and Account Administrators do not necessarily have the access to do it. This action is normally done by the Participant Contact (PaCo) of the organisation within the consortium.

LEARs and Account Administrators may, however, request to be granted the PaCo role for the organisation within that project. In this scenario, a LEAR / Account Administrator would be able to assign the PLSIGN/PFSIGN for the project too.

See Access to Projects and Proposals for LEARs or Account Administrators for information on how the LEAR / Account Administrator requests an active role in the project. PaCo is a so called "active role" in a project because it grants access to do things within the project administrative forms. LEARs / Account Administrators can also have a read only access to the project, but this level of access is not enough for them to appoint PLSIGNs / PFSIGNs.

Audit Roles

Prerequisite

Audit Roles can be only managed when your organisation has ongoing or past audits. If it is not the case, you will not able to assign the audit roles, you will not see them in the list of roles when adding a new role.

When assigning an audit role, you need to assign the role to the person and the person to a team, and as second step, assign the audit to the same team (see how to assign audits to a team)

There are two types of roles for Audits:

- Organisation level roles, which manage all administrative parts in portal. For instance, they manage the audit teams (creation, assignment of audits to the team, etc) as well as being in charge of nominating other audit roles for the organisation.

  Namely:

  - the primary audit contact for audited organisations and
  - the primary external auditor and external auditor administrator for audit firms.

  These roles are not assigned to an audit team, because they are granted at organisation level, instead of at audit level.

- Audit level roles, which grant access to the AMS (Audit Management System) in order to carry out the audit tasks. Persons granted these roles have to be assigned to the respective audit team in order to have access to the audit.

  Namely:

  - the assigned audit contact for the audited organisations and
  - the external auditor, external audit team member, and the external audit firm local auditor for audit firms.

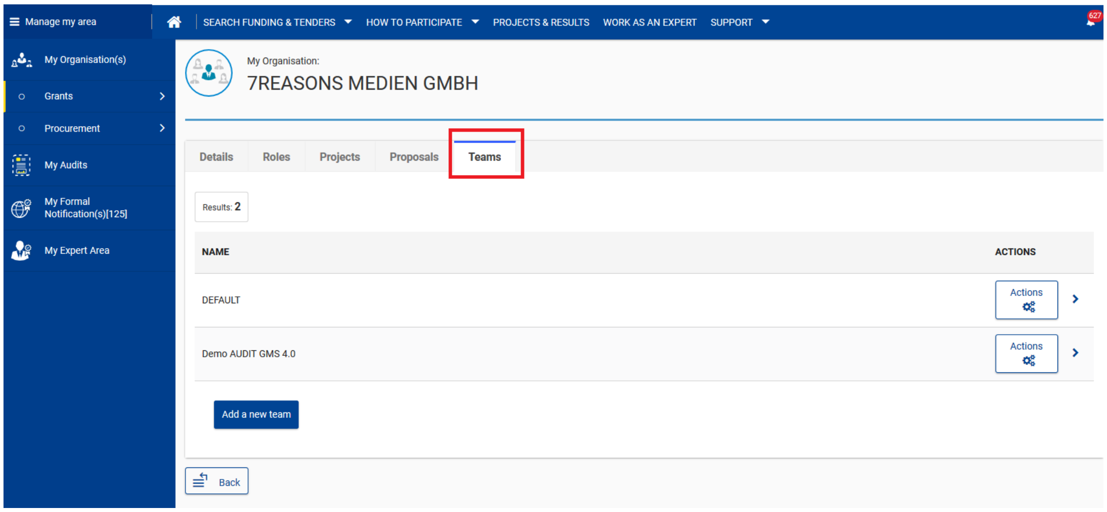
For external audit firms only

If you are an external audit firm, see AUDIT Firm Roles

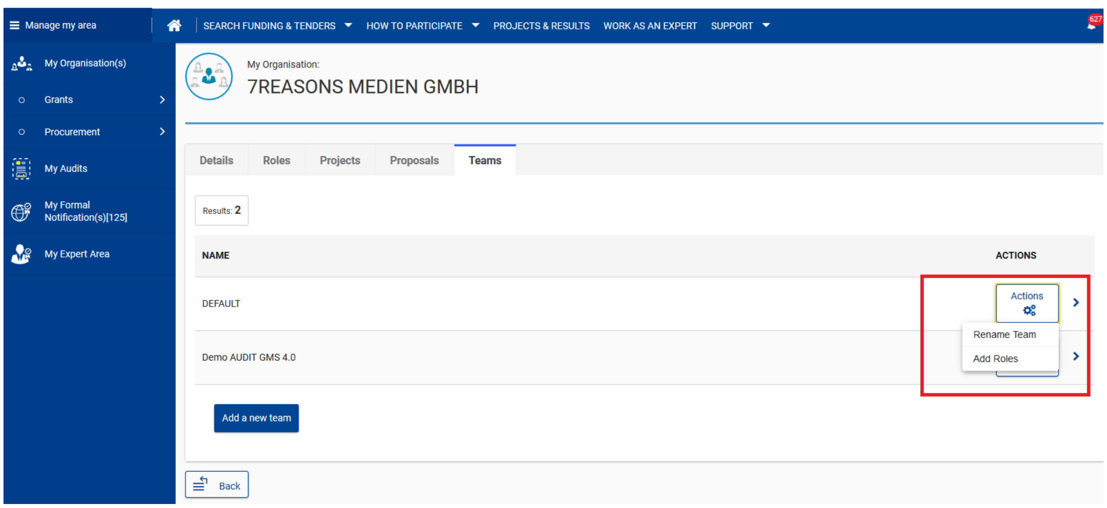
Assign an audit role and a team to a person

For Audited organisations, the LEAR will be assigned the first primary audit contact role. This role can manage the audit team, and may assign other audit roles for their organisation. If this is your first audit, a "Default" team has been created for you.

The Primary Audit Contact accesses their organisation roles under **My organisations** / **Actions** / **View Roles**, and clicks on the Teams tab.

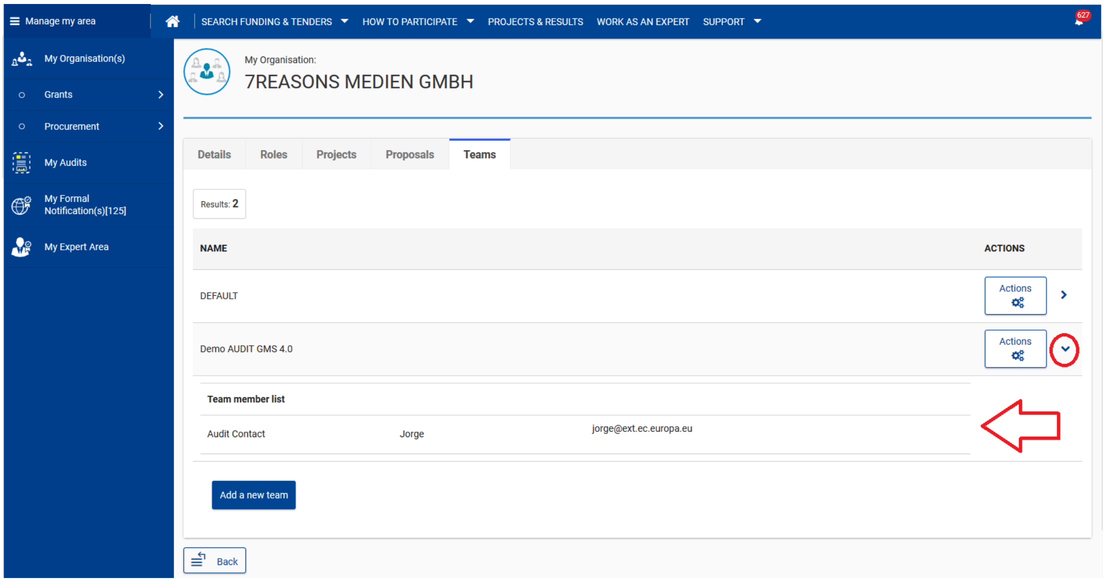


Rename the team or add roles to an audit team by selecting **Actions**.



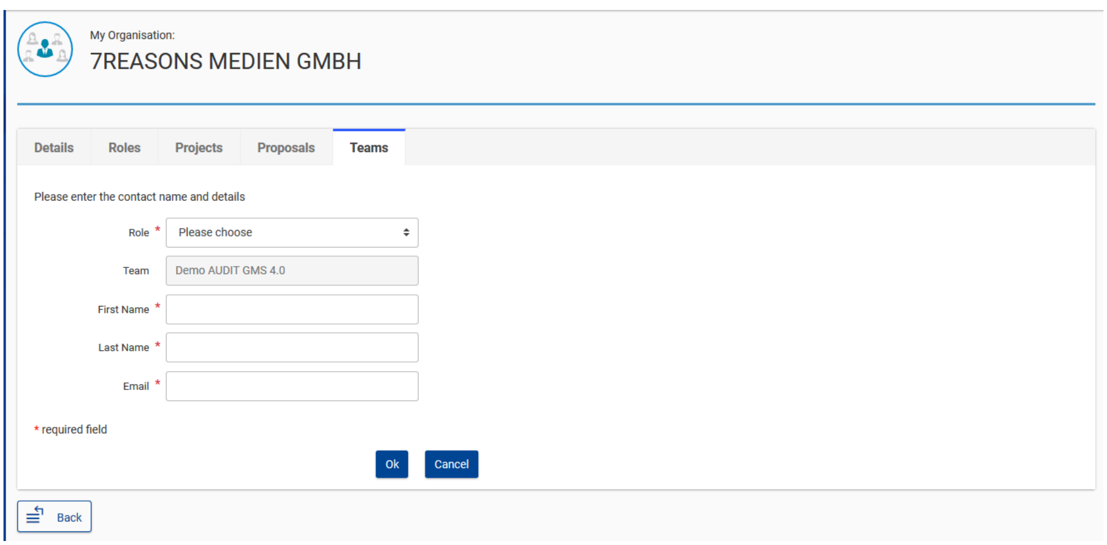
Use **Add a new team** to create a new team.

To display the current members of a team click on the arrow on the right.

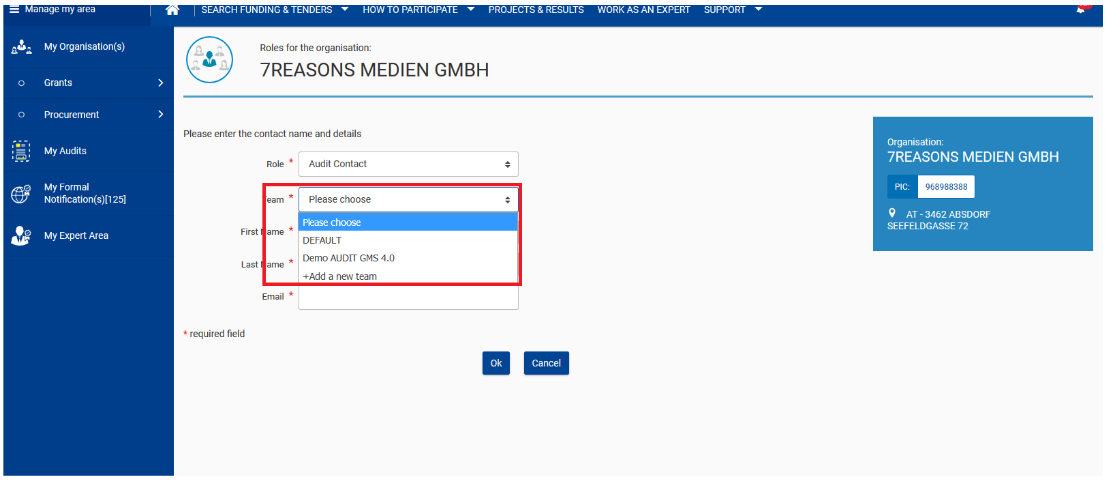


To add new audit contacts to a team, the Primary Audit Contact can do either of the following actions:

Go to the Teams tab (**My organisations** / **Actions** / **View Roles**), select **Actions/add role** for one of the teams. The audit contact role will be granted for that specific team.

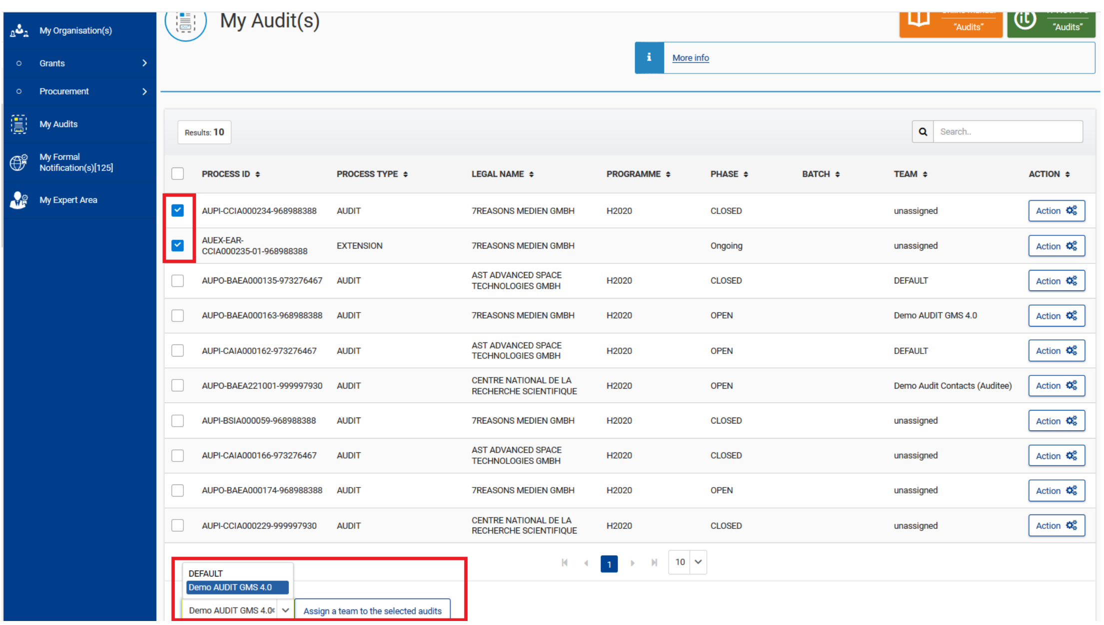


Go to the Roles tab (**My organisations** / **Actions** / **View Roles**), click on **Edit Organisation Roles** and then on **Add roles**. It is possible to assign other primary audit contacts or audit contact roles in this way. When assigning audit contacts, you will need to specify the team, which you can select from the drop-down list. It is also possible from this screen to add a new team by choosing **+Add New Team**.



Assign an audit to a team

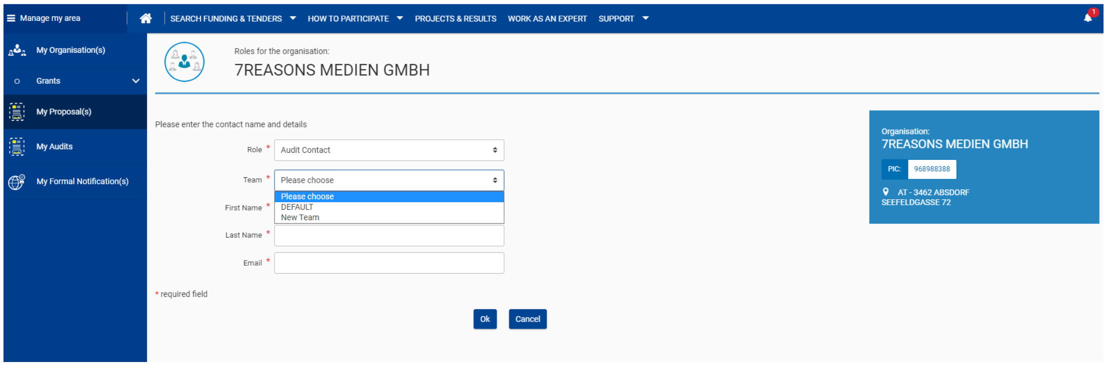
Once the roles are assigned, the Primary Audit Contact needs to assign the audit to the team by going to **My Audits**. If the audits are currently assigned to a team, the name will be displayed in the corresponding column. An unassigned audit can be selected and assigned to a team from the drop-down list and clicking on **Assign a team to the selected audits**. It is possible to select and assign several audits to one team at a time.



Audit contacts can assign roles

Additionally, Audit Contacts can nominate other Audit Contacts, but only for the teams they are members of, in either of the following ways:

Via **My organisations** / **Actions** / **View Roles** : once in the **Roles** tab, click **edit organisations roles**, then click on **Add Roles**.
If you are assigned to more than one team, you will be able to choose the team.
If you are assigned to only one team the new Audit Contact will be automatically added to your only team.
Note that you do not have the possibility to create a new team, only the Primary Audit Contacts can do this.



Via **My organisations** / **Actions** / **View Roles :** once in the **Teams** tab, click on **Actions**/**Add Roles** for the relevant team, and enter the details of the Audit Contact.
It is not possible to modify the team when adding a role via the **Teams** tab (the team is greyed out).
The **Actions** button for a team will only be available to anyone that is a member of that team.