

User roles in AssureAI

Various roles are available in the system to allow the users to access the features / clients on a need-to-know basis.

Role	Remarks
Auditor	<ul style="list-style-type: none"> Has unrestricted access to all features and assignments. Has read/write access to all configuration features under My Firm, Statement generation settings, Field work settings and Task Management settings. Can participate as maker / checker and approver in all types of assignments Can also access assignments where he or his team is not participating as maker / checker / approver. Can create/edit/deactivate any client. Can unfinalize annual audits.
Administrator	<ul style="list-style-type: none"> Has read/write access to all configuration features under My Firm, Statement generation settings, Field work settings and Task Management settings. Cannot participate as maker / checker / approver in assignments, hence does not have access to them. Can create/edit/deactivate any client. Administrator role can be additionally added to any other audit user to allow them access to the configuration features. In such cases, any audit user with Administrator access can also unfinalize an assignment that he is a part of.
Audit Manager	<ul style="list-style-type: none"> Has READ access to My Team. Does not have access to any other Configuration features. Can participate as maker / checker and approver in all types of assignments. Can create/edit/deactivate any client.
Audit Assistant / Junior Audit assistant	<ul style="list-style-type: none"> Does not have access to any of the Configuration features. Can participate as maker / checker and approver in all types of assignments. Can create/edit any client. Cannot deactivate a client.
External Auditor	<ul style="list-style-type: none"> This role can be used in cases where a few clients' audits are outsourced to an auditor outside the firm. Here the system will allow you to select the list of clients that the user should be given access to. Does not have access to any of the Configuration features. Can participate as maker / checker and approver in all types of assignments for the clients that he has access to. Can view and edit the clients that he has access to. Cannot create or deactivate clients.

Role	Remarks
Task Management user	<ul style="list-style-type: none"><li data-bbox="435 235 1118 266">• Does not have access to any of the Configuration features.<li data-bbox="435 300 1457 360">• Can participate as maker / checker and approver in assignments other than Annual audit for the clients that he has access to.<li data-bbox="435 394 1066 425">• Can create/edit any client. Cannot deactivate a client.