

Give an auditor access

Add an external auditor to an audit session, preview what they will see, resend their invitation and take their access away, from the Auditors tab.

WHO IT IS FOR Owner, Admin, Manager, Compliance Officer	TIME NEEDED About 8 minutes	LAST REVIEWED 3 October 2026
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Who this is for

Permissions: To add an auditor or resend an invitation you need **Can invite auditor**. To take access away you need **Can revoke auditor access**. To preview the auditor portal you need **Can preview auditor portal**, and your role must be Owner, Admin or Manager. To see the **Auditors** tab you need **Can view audit centre**. Owners and Admins have all of these. The Manager role includes them to start with, and the Compliance Officer role includes all but the preview. A person who is missing one does not see the matching form or button. An Owner or Admin can change this in **Configuration > Roles & Permissions**.

Before you begin

- Read the Audit Centre overview for how auditor access works. An audit session exists, with **Access starts** and **Access expires** set. See Run an audit session.
- You have the auditor's work email address, and ideally their name. The invitation goes to that address, and you cannot change the address after you add the auditor.
- The files the auditor should see are uploaded to the session. See Run an audit session.



Steps

1 Go to **Audit Centre** > **Audit sessions** and open the **Auditors** tab

- 1 In the left menu, under **Administration**, choose **Audit Centre**.
- 2 Choose the **Audit sessions** tab, then choose the card of the session the auditor will review.
- 3 Under the session name, choose the **Auditors** tab.
- 4 On the left, the **Add auditor** form is where you invite someone.
- 5 On the right, **Auditors** lists everyone already added to this session. A session with nobody added says **No auditors added**.

Note: Auditors belong to one audit session. If the same person reviews two audits, add them to each session.

The screenshot displays the 'Audit & Compliance Centre' interface. On the left is a dark sidebar menu with categories: 'REGISTERS' (including Rostering, Sites, SIL/Smart Rostering, Approvals, Timesheets, Invoicing, Support Coordination, Service Agreements, Staff Contracts, Documents, Reports, Charts, Incidents) and 'ADMINISTRATION' (including Automation Centre, Audit Centre, Pay Levels, Settings, Configuration). The 'Audit Centre' is highlighted with a blue circle and the number 1. The main content area has a top navigation bar with tabs: 'Readiness', 'Audit sessions' (highlighted with a blue circle and the number 2), 'Issues', 'Checks', 'Prepare audit', 'Complaints', 'Ratings', and 'Settings'. Below this is a card for 'Casey Sample Mid-term Audit' with a 'Back to sessions' button. The card has a sub-navigation bar with tabs: 'Evidence', 'By Standard', 'Samples', 'Findings', 'Auditors' (highlighted with a blue circle and the number 3), 'Requests', and 'Access Logs'. The 'Auditors' tab is active, showing two panels. The left panel, 'Add auditor', has input fields for 'Email' and 'Full name', and an 'Add auditor' button (highlighted with a blue circle and the number 4). The right panel, 'Auditors', lists 'Taylor Sample' with email 'taylor.sample@example.com', an 'Active' status, and buttons for 'Preview portal', 'Resend invite', and 'Revoke' (highlighted with a blue circle and the number 5).

Choose **Audit Centre** (1) and the **Audit sessions** tab (2), open the session, then choose **Auditors** (3). **Add auditor** (4) is on the left and the list of auditors (5) is on the right.



2 Enter the auditor's details and choose **Add auditor**

- 1 In **Email**, type the auditor's work email address.
- 2 In **Full name**, type their name.
- 3 Choose **Add auditor**. The button reads **Adding...** while it works.

Check the list on the right first, so you do not add the same person twice.

Email: Required. The address the invitation is sent to. You cannot change it after you add the auditor, so check it before you choose **Add auditor**.

Full name: Optional. Shown on the auditor's card and in the notification you receive when they send a request. If you leave it blank, their email address is shown instead.

Permissions: The **Add auditor** form and **Resend invite** need **Can invite auditor**. **Revoke** needs **Can revoke auditor access**. Without them the **Auditors** list is still shown.

The screenshot shows a web application interface with a top navigation bar containing links: Evidence, By Standard, Samples, Findings, Auditors (highlighted), Requests, and Access Logs. The main content area is split into two panels. The left panel, titled 'Add auditor', contains two text input fields: 'Email' (with a blue circle '1' next to it) containing 'kai.sample@example.com', and 'Full name' (with a blue circle '2' next to it) containing 'Kai Sample'. A blue button labeled 'Add auditor' (with a blue circle '3' next to it) is at the bottom right of the form. The right panel, titled 'Auditors', displays a card for 'Taylor Sample' with the email 'taylor.sample@example.com' and a green 'Active' status tag. Below the card are three buttons: 'Preview portal', 'Resend invite', and 'Revoke'.

Type the auditor's email address (1) and full name (2), then choose Add auditor (3).



3 Check the new auditor on the list

- 1 The auditor's name is at the top of their card. If you left **Full name** blank, their email address is used.
- 2 The email address is under the name.
- 3 The label shows where the auditor has got to. A new auditor shows **Invited**, or **Scheduled** when the session's access has not started yet.
- 4 The buttons on each card are **Preview portal**, **Resend invite** and **Revoke**. The next steps explain each one.

A message tells you what happened to the invitation. **Auditor invite sent.** means the email has gone. If the session's **Access starts** time is still in the future, the card shows **Scheduled** and the invitation is held until access opens. Check the card when access opens. A card that still shows **Scheduled** has not been sent its invitation, so choose **Resend invite**.

If a message says the invitation was not sent, use **Resend invite** once the problem is fixed.

The auditor receives an email titled **Audit access invitation** followed by your organisation's name. It shows the session, the audit dates and when access expires, and its **Open audit portal** button takes them to the portal.

Scheduled: You added the auditor before the session's **Access starts** time. The invitation is held. Choose **Resend invite** to send it.

Invited: The invitation has been sent and the auditor has not opened the portal yet.

Active: The auditor has opened the portal using their link.

Revoked: You chose **Revoke**. The auditor can no longer open the portal.

The new card shows the name (1), the email address (2), the label **Invited** (3) and the buttons **Preview portal**, **Resend invite** and **Revoke** (4).



4 Preview what the auditor sees

- 1 On the auditor's card, choose **Preview portal**. The auditor portal opens in a new browser tab, under a panel that says **Previewing auditor view**.
- 2 Look through the portal: the summary tiles, **Shared evidence**, **Findings**, **Request more evidence** and **Your requests**. This is what the auditor sees.
- 3 The auditor does not sign in to BondiByte. They use the link in their email and see this audit only. They see only files marked **Shared with auditor**. **View** opens a file and **Download** saves it, and both work only on a file that has **Auditor can download** ticked. They can send requests and raise findings. They cannot upload files or change anything of yours. If **Require auditors to verify with an emailed code** is ticked, they first type the 6 digit code from their email.
- 4 Choose **Exit preview** at the top of the portal to go back to the **Audit Centre**.

Nothing you do in the preview reaches the auditor or your records. The preview is recorded on the **Access Logs** tab.

Permissions: **Preview portal** works for the Owner, Admin and Manager roles. In any other role, choosing it gives the message **You do not have permission to preview as this auditor**.

Note: If nothing happens when you choose **Preview portal**, your browser may have blocked the new tab. Allow pop-ups for BondiByte, then try again.

5 Resend an invitation when the auditor cannot find theirs

- 1 On the auditor's card, choose **Resend invite**.
- 2 A message says **Auditor invite resent**, and a new email goes to the auditor. The label goes back to **Invited** until they open it. The link in the earlier email stops working, so the auditor must use the newest one.

On an auditor who shows **Scheduled**, **Resend invite** sends the invitation straight away. The auditor still cannot open the portal before the session's **Access starts** time.

Warning: **Resend invite** is also shown on an auditor whose access you have revoked. Resending gives that auditor access again, so do not use it on a revoked auditor unless you mean to let them back in.



6 Take access away with **Revoke**

- 1 On the auditor's card, choose **Revoke**. No confirmation window asks first.
- 2 A message says **Auditor access revoked**.
- 3 The label changes to **Revoked**. The auditor can no longer open the portal, and their link leads to a page that says **Audit portal access could not be verified**.

Revoke affects that auditor only. Other auditors and the session's files are not changed. Access also ends by itself at the session's **Access expires** time, so you do not have to revoke an auditor when an audit finishes on schedule.

Important: Revoking stops the auditor opening the portal again. It does not take back files they have already downloaded.

Warning: Do not use **Delete session** to take an auditor's access away. It removes the whole session, with its evidence, requests and access logs. Use **Revoke** instead.

The screenshot shows the 'Audit & Compliance Centre' interface. At the top, there's a notification message: 'Auditor access revoked.' with a green checkmark icon and a close button. Below this, the 'Auditors' tab is selected, showing a list of auditors. The first auditor, 'Kai Sample', has a status of 'Revoked' and a 'Revoke' button. The second auditor, 'Taylor Sample', is partially visible. The 'Add auditor' form on the left has fields for 'Email' and 'Full name' and an 'Add auditor' button. The top navigation bar includes links for 'Readiness', 'Audit sessions', 'Issues', 'Checks', 'Prepare audit', 'Complaints', 'Ratings', and 'Settings'.

Choose **Revoke** (1). A message says **Auditor access revoked**. (2) and the label changes to **Revoked** (3).

What happens next

The auditor opens the invitation email, chooses **Open audit portal** and sees the files you have shared. Their label changes from **Invited** to **Active** the first time they do. Their requests appear on the **Requests** tab. See [Manage evidence requests](#).

After the session's **Access expires** time the auditor can no longer open the portal, without any action from you.

Everything the auditor does in the portal, and everything you do to give, change or remove their access, is recorded on the **Access Logs** tab. See [Review auditor access history](#).



Important notes

Important: Treat an auditor's invitation like a key. Add only the people who need to review the audit, use their own work email address, and revoke access as soon as they no longer need it.

Note: Adding an auditor does not share anything, and sharing a file does not add an auditor. You need both.

Good practice

- Add the auditor once the files are ready, then use **Preview portal** to check what they will see before they open their invitation. You can still share more files afterwards.
- Use the auditor's own work email address, and give each reviewer their own entry. You cannot edit an address, so if it is wrong, add the person again with the right address and choose **Revoke** on the wrong entry.
- Revoke access when the audit is finished rather than waiting for it to expire, and check the **Access Logs** tab first so you know what happened during the audit.

Troubleshooting

I cannot see the **Add auditor** form, or the buttons on the auditor's card.

Why it happens: Your role does not include **Can invite auditor** (for the form and **Resend invite**), **Can revoke auditor access** (for **Revoke**) or **Can preview auditor portal** (for **Preview portal**, which is also limited to the Owner, Admin and Manager roles).

What to do: Ask an Owner or Admin to check your role in **Configuration > Roles & Permissions**.

A new auditor shows **Scheduled** and no invitation has arrived.

Why it happens: The invitation is held while the session's **Access starts** time is still in the future, and the card keeps showing **Scheduled** until it is sent.

What to do: Choose **Resend invite** on the auditor's card to send the invitation. The auditor still cannot open the portal before the session's **Access starts** time.

A message says **Auditor invite email could not be sent** or **Auditor invite was not sent because email delivery is disabled**.

Why it happens: The invitation email did not go out. The auditor is on the list, but they have not received a link.

What to do: If the address you typed was wrong, add the person again with the right address and choose **Revoke** on the wrong entry. If it was right, choose **Resend invite**. If the message appears again, contact BondiByte support.

The auditor says their link does not work and the portal says **Audit portal access could not be verified**.

Why it happens: The link is invalid, expired, revoked or outside its access window. A newer invitation replaces the earlier link, and access can have ended or not yet started.

What to do: Check the auditor's label and the session's **expires** time. If access should be open, choose **Resend invite** and ask the auditor to use the newest email.



The auditor sees **No files released yet**, or can see a file but cannot open it.

Why it happens: No file is marked **Shared with auditor**, or **Auditor can download** is not ticked on the file. The auditor then sees **You are not allowed to download this file**.

What to do: On the **Evidence** tab, choose **Share with auditor** on each file the auditor should see, and tick **Auditor can download** on the ones they need to open.

The auditor says there is no way to send a request.

Why it happens: The session was created with **Allow auditor requests** unticked. The auditor's form then says **Evidence requests are disabled for this audit**.

What to do: Create a new session with **Allow auditor requests** ticked, and add the auditor to that one.

Need more help?

Guides: bondibyterobotics.com.au/guides | Support: support@bondibyterobotics.com.au

*Screens show a demonstration organisation with made-up names and may differ slightly as BondiByte is updated.
Last reviewed 3 October 2026.*