

Introduction to User Permissions

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Managing equity and ESOPs involves various people and designations across the hierarchy of the company. In QapMap, we call these Personas or role a person plays in managing or using QapMap.

Typically, these people could be:

- Administrators
- Heads of departments
- Finance team/HR team/ managers
- Fund managers
- Investors
- Advisors and other external stakeholders
- Employees

QapMap provides certain predefined roles and personas. You can also create custom roles for administrator as needed for your company. Each of these different roles may need different levels of access, depending on how they need to know, approve, or sign off.

QapMap allows you to set permissions to the following:

- Cap Table
- Equity Award
- Others (User management, Settings, etc.)
- Data Room
- Reports
- Equity data for certain option holders

You can use QapMap's Manage Roles screen to create set specific administrator roles with corresponding permissions to reflect these levels of access. This will allow or restrict their activities on QapMap as per their role.

Note: This feature is available to the administrator of Issuer company.

Admin user can define custom tags and values within Stakeholder settings page. Eg: If "Entity" is a tag, it may have Qapita India, Qapita Singapore as values. If "Department" is a tag, it should have HR, Finance, Development as values.

To access the Roles and Permissions screen, click **Settings** in the menu on the left and click **Manage Roles**. The predefined roles are displayed by default.