Add Roles

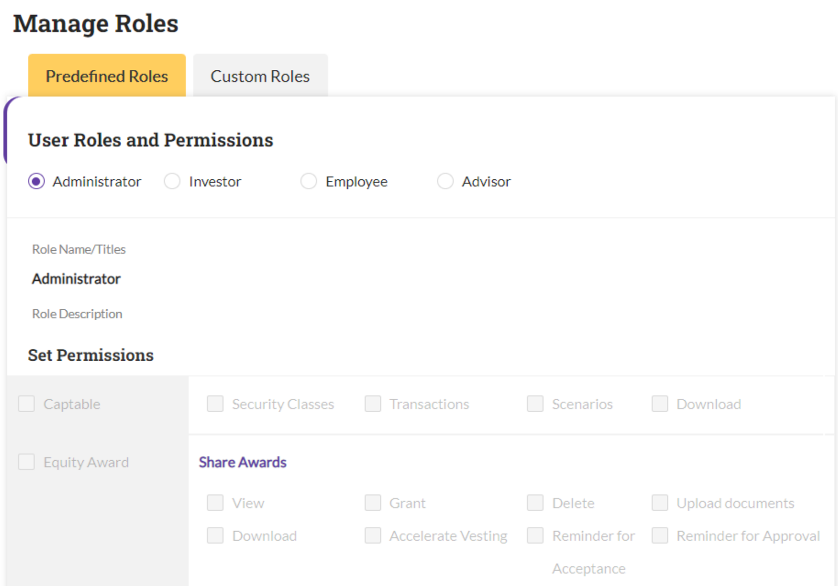
Modified on: Thu, 2 Jun, 2022 at 4:17 PM

QapMap provides pre-defined roles for standard roles within an organization. These roles allow different levels of access, depending on what they need to know, approve, or sign off. The default roles are:

- Admin
- Investor
- Employee
- Advisor

One of the most important permissions in QapMap is the access to the Cap Table.

- For a person with Admin level access, Cap Table access is default to “Detailed view”.
- For a regular employee, Cap Table access is defined by “Individual view”.



Create a Custom Role

You can also create custom roles as needed for your company. Each of these different roles may need different levels of access, depending on what they need to know, approve, or sign off.

The typical process in setting permissions is as follows:

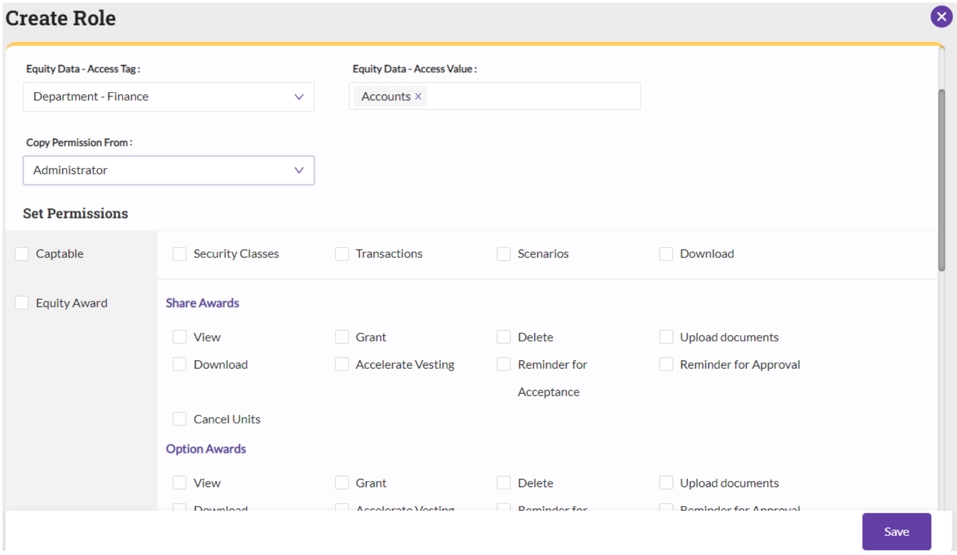
QapMap allows you to set permissions to the following:

- Cap Table
- Equity Award
- Others (User management, Settings, etc.)

- Data Room
- Reports

To create a new custom role:

1. To access the Roles and Permissions screen, click **Setting** in the menu on the left and click **Manage Roles**.
2. Click **Custom Roles**.
3. Click **Add New Custom Role**.



4. In the displayed Create Role screen, type the **Role Name** and **Role Description**.
5. Select the Equity Data **-** Access Tag. Access tags allow employees permissions based on permissions granted (entity, country and department)
6. You can base this role on another role by selecting the role in the **Copy Permission From** drop down.
7. You can now set permissions under the Cap Table, Equity Award, Others (User management, Settings, etc.), Data Room, and Reports. This ensures that the person assigned this role will be able to see only the components enabled here.
8. Click **Save** to complete the process. The newly-defined custom role is displayed along with Standard roles.