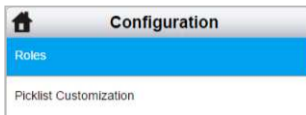


Configuration

The Configuration option helps the Administrator to set up access roles for various operations available in the application. The user is not directly assigned permissions; instead, the user is assigned a role. The role defines what permissions are available to the user. Also, it offers a way to customize picklist of the application.



Roles

Some roles are system defined and may not be edited or deleted. Other roles are defined by the Account Administrator and may be edited or deleted.

There are two types of roles in the application:

- **Account Roles**
- **Project Roles**



Account Roles

The permissions in this role cover all sections of the application other than Issues. These roles are system defined and cannot be edited. To view the permissions of required role, click on the Arrow button available in front of respective role.

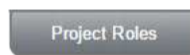


On the screen that appears, you can view the permission rights associated with respective role. This screen is read-only.

Name	Account Admin
Active	<input checked="" type="checkbox"/>
Permissions	Project Full Access Report Template Full Access Business Full Access Picklist Full Access Role Full Access

Project Roles

The permissions in this role cover the Issues section of the application. To add new roles under this section, switch to Project Roles tab.



Now, on the screen that appears:

- Click on **Add Role +** button.
- The New Project Role window appears. Enter the name, toggle the status as Active, and click on the permission link to select the intended rights.
- Click on **Save**.

Name	Issue Tester
Active	<input checked="" type="checkbox"/>
Permissions	View Issues

Picklist Customization

The Picklist Customization option allows the Account Administrator to add new items, update the item name or delete the items in Issue Type and Document Type picklist (available on *Issue screen*) as per requirement.

- Click on the **Picklist Type** link.
- The window displaying the types of picklists appears. Select the type as *Issue Type* or *Document Type* as required.
- Click on **Add Picklist Item +** button. The window for adding details of the new item appears. Specify the document/Issue type (based on the option selected at *Picklist Type* field). Toggle the **Active** option to make it available in the application.
- Click on **Save**.

