Understanding User Roles

Each user will need to be given a designated User Role. The User Roles are most important with regard to Tracking & Reporting.

User Roles

OMAH - Organization Master Account Holder
- o Project Creation: can create projects in any department.
- o Visibility: has visibility into every project in every department throughout the organization, including CBOs (nonprofits).
- o Reporting: can run reports to retrieve any information from any project, any department, or any user activity.
- o Account Management: has the ability to add or delete users, reset user passwords, run activity reports on the organization's users,
and generate emails to all users.

DMAH - Department Master Account Holder
- o Project Creation: can create projects in the user's assigned department(s).
- o Visibility: has visibility into every project in the user's assigned department(s).
- o Reporting: can run reports to retrieve any information from any project in the user's assigned department(s).
- o Account Management: has the ability to add or delete users, reset user passwords, run activity reports on the users in
his/her assigned departments and generate emails to all users in his/her assigned department(s).

Department
- o Project Creation: can create projects in the user's assigned department(s).
- o Visibility: has visibility into project he/she is assigned to ONLY.
- o Reporting: The user cannot run reports.
- o Account Management: has no organization or departmental account management access.

Nonprofit - (CBO)
- o Project Creation: can create projects in the user's assigned department(s).
- o Visibility: has visibility into project he/she is assigned to ONLY.
- o Reporting: The user cannot run reports.
- o Account Management: has no organization or departmental account management access.

***Users may be assigned to multiple departments if needed. For example, if a Budget Analyst needs to have DMAH responsibilities for more than one department, but not the entire organization, that person can be assigned to all the departments they need access to as a DMAH. Or if a DMAH for a city department needs to have visibility into the CBOs(nonprofits) who are sub-recipients, that user can be assigned to the CBO in addition to being assigned to their own department. This is true for any user role.