



FUNDED ORGANISATION ROLES AND MODULES MATRIX



Funded Org P2i Roles and Modules matrix

Modules	Permissions	P2i Role	Brief Description and Key Responsibilities in P2i
Supplier Contract Management Portal (JA): RFI's / RFQ's Contract Management Supplier Management User Management	Editor Editor Editor Editor	P2i Director	An approver role for performance data and Financial Acquittal Statements in P2i for the Funded Organisation. Key Responsibilities <ul style="list-style-type: none"> Views supplier information in the Contract Hub Views and approves Performance Based Acquittals Monitors unspent funds Views and approves Annual Financial Statements Views and approves Financial Acquittals Views payment recommendation Views additional contracted reports Cannot do in P2i <ul style="list-style-type: none"> Cannot edit contract information, user roles, Service Outlet information Cannot edit Performance Based Acquittals Cannot generate Unspent Funds reports Cannot attach Annual Financial Statements Cannot edit Financial Acquittals Cannot edit additional contracted reports
Acquittals Dashboard (PE): Annual Financial Statements Contract Management Hub Special Purpose Financial Acquittals Milestone Social Service Fulfilment (PBAs) Supplier Additional Contracted Reports	Approver Viewer Approver Approver Approver Viewer Viewer		
Supplier Contract Management Portal (JA): RFI's / RFQ's Contract Management Supplier Management User Management	Editor if associated to object Editor if associated to object - -	Service Outlet Data Entry	Enters financial and performance acquittal information into P2i for the Funded Organisation. Key Responsibilities <ul style="list-style-type: none"> Views information on the Contract Hub Views and edits Performance Based Acquittals Monitors Unspent Funds Views Annual Financial Statements Views and edits Financial Acquittals Views and edits additional Contracted Reports Cannot do in P2i <ul style="list-style-type: none"> Cannot edit contract information, user roles, Service Outlet information Cannot approve Performance Based Acquittals Cannot generate Unspent Funds reports Cannot edit or approve Annual Financial Statements Cannot approve Financial Acquittals
Acquittals Dashboard (PE): Annual Financial Statements Contract Management Hub Special Purpose Financial Acquittals Milestone Social Service Fulfilment (PBAs) Supplier Additional Contracted Reports	Viewer Editor Editor Viewer Editor Viewer Editor		
Supplier Contract Management Portal (JA): RFI's / RFQ's Contract Management Supplier Management User Management	Editor if associated to object Editor if associated to object - -	Supplier Budget and Finance	Records unspent funds for Performance Based Acquittals, reports Financial Acquittal Statements and reports Audited Financial Statements in P2i for the Funded Organisation. Key Responsibilities <ul style="list-style-type: none"> Views supplier information in the Contract Hub Views Performance Based Acquittals Monitors and generates Unspent Funds report Attaches Annual Financial Statements Views and edits Profit and Loss Statements (aka Annual Audited Statements) Views and edits Financial Acquittals Views Payment Recommendation Views and edits additional Contracted Reports Cannot do in P2i <ul style="list-style-type: none"> Cannot edit contract information, user roles, Service Outlet information Cannot approve Performance Based Acquittals Cannot approve Profit and Loss Statements (aka Annual Audited Statements) Cannot approve Financial Acquittals Cannot approve Contracted Report
Acquittals Dashboard (PE): Annual Financial Statements Contract Management Hub Special Purpose Financial Acquittals Milestone Social Service Fulfilment (PBAs) Supplier Additional Contracted Reports	Editor Viewer Editor Editor Editor Viewer Viewer Editor		



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Supplier Contract Management Portal (JA): RFI's / RFQ's Contract Management Supplier Management User Management	Editor if associated to object Editor if associated to object - -	Service Outlet Manager	Endorses performance data in P2i for the Funded Organisation. Key Responsibilities <ul style="list-style-type: none"> Views and edits contract information, user roles, Service Outlet information on the Contract Hub. Views and approves Performance Based Acquittals Monitors Unspent Funds report Views Annual Financial Statement Views Financial Acquittals Views Payment recommendation Views additional Contracted Reports Cannot do in P2i <ul style="list-style-type: none"> Cannot edit Performance Based Acquittals Cannot generate Unspent Funds report Cannot attach Annual Financial Statements Cannot edit or approve Financial Acquittals Cannot edit or approve additional Contracted reports
Acquittals Dashboard (PE): Annual Financial Statements Contract Management Hub Special Purpose Financial Acquittals Milestone Social Service Fulfilment (PBAs) Supplier Additional Contracted Reports	Viewer Editor Viewer Viewer Approver Viewer Viewer		
Supplier Contract Management Portal (JA): RFI's / RFQ's Contract Management Supplier Management User Management	Editor Editor Editor Editor	Supplier Administrator	Manages the P2i system for the organisation. The first person to register the Funded Organisation in P2i will be granted the System Administrator role for the Funded Organisation. Key Responsibilities <ul style="list-style-type: none"> Manages the P2i system for the supplier, creates/updates and deletes system roles. Can elevate other users' access levels for additional admin assistance. Allocates Funded Org staff to P2i system roles and allocates them to specific contracts. Views and edits contract information, user roles in the Contract Hub Views Performance Based Acquittals Monitors Unspent Funds Views Annual Financial Statements Views Financial Acquittals Views Payment Recommendation Views additional Contracted Reports Cannot do in P2i <ul style="list-style-type: none"> Cannot edit Service Outlet attributes Cannot edit or approve Performance Based Acquittals Cannot generate Unspent Funds reports Cannot attach Annual Financial Statements Cannot edit or approve Financial Acquittals Cannot edit additional Contracted Reports
Acquittals Dashboard (PE): Annual Financial Statements Contract Management Hub Special Purpose Financial Acquittals Milestone Social Service Fulfilment (PBAs) Supplier Additional Contracted Reports	Viewer Editor Viewer Viewer Viewer Editor Viewer		