

Release Strategies (Approvals)

SRM Bid Creation

SRM Contract Creation

SRM Purchase Order Creation

Description of Acronyms

RFQ – Request for Quote

IT- Information Technology

ITQ — Invitation to Qualify

ACM – Associate Commodity Manager

CM – Commodity Manager

CPO – Chief Procurement Manager

OGC – Office of General Counsel

DGS – Dept. of General Services

Release Strategy (Approvals) - SRM Bid Creation

DGS Bid Document Types	Thresholds	Approval Strategy
Request For Proposal Material	N/A	Commodity Manager, DGS Legal
Invitation For Bid Material Supplier Price Request Material	N/A	Commodity Manager
Request For Proposal Service	N/A	Commodity Manager, DGS Legal
Invitation For Bid Service Supplier Price Request Service	N/A	Commodity Manager
RFQU Material RFQU Service	N/A	None – however Ad-Hoc approvals are supported for this bid document type. Ad-Hoc approvals cannot be used for other bid document types.
RFQ-IT ITQ Material	N/A	Commodity Manager, OA Legal
RFQ-IT ITQ Service	N/A	Commodity Manager, OA Legal

Agency Bid Types	Thresholds	Approval Strategy
Invitation For Bid Material Invitation For Bid Services Supplier Price Request Material Supplier Price Request Service	N/A	Agency Head
Request For Proposal Material Request For Proposal Service RFQ-IT ITQ Material RFQ-IT ITQ Service	N/A	Agency Head, Agency Legal
RFQU Material RFQU Service	N/A	None – however Ad-Hoc approvals are supported for this bid document type. Ad-Hoc approvals cannot be used for other bid document types.

Note: In the case of Information Technology (IT) Procurements, workflow will route to appropriate Office of Administration (OA) roles.

Release Strategy (Approvals) - SRM Contract Creation

DGS Contract Types	Thresholds	Approval Strategy
Materials: Statewide ITQ Statewide Dealer/Reseller Statewide Multi-award Statewide Regular Contract Statewide Header	\$10K-\$50K \$50K-\$100K \$100K-\$1M \$1M-∞	DGS Legal ACM,DGS Legal ACM,CM,DGS Legal ACM, CM, CPO, Treasury, DGS Legal
Statewide Sole Source Material	\$10K - ∞	DGS Dep. Sec. for Procurement, DGS Legal, Treasury, Sole Source Board, CPO
Services: Statewide ITQ Statewide Dealer/Reseller Statewide Multi-award Statewide Regular Contract Statewide Header Statewide Sole Source Service	\$10K-\$50K \$50K-\$100K \$100K-\$1M \$1M-∞*	DGS Legal ACM,DGS Legal ACM,CM,DGS Legal ACM, CM, CPO, DGS Legal *Comptroller no longer in process except for non-standard terms & conditions

Agency Contract Types	Thresholds	Approval Strategy
Materials: Agency Contract	\$10K-\$20K \$20K-∞	Agency Legal Agency Head, Agency Legal * Comptroller no longer in process except for non-standard terms & conditions
Services: Agency Contract Agency Sole Source Service	\$10K-\$25K \$25K-∞	Agency Head, Agency Legal Agency Head, Agency Legal, Attorney General * Comptroller no longer in process except for non-standard terms & conditions

Important Note:

If Non-Standard Terms & Conditions are checked Office of General Counsel (OGC) & Attorney General are added to the process.

Except for Independent Agencies - Attorney General only is added to the process

Release Strategy (Approvals) - SRM Purchase Order Creation

DGS Purchase Order Types	Thresholds	Approval Strategy
DGS issued Material	\$10K-\$50K \$50K-\$100K \$100K-\$1M \$1M-∞	Comptroller, DGS Legal ACM, Comptroller, DGS Legal ACM, CM, Comptroller, DGS Legal ACM, CM, CPO, Comptroller, Treasury, DGS Legal
DGS issued Service	\$10K-\$25K \$25K-\$50K \$50K-\$100K \$100K-\$1M \$1M-∞	Comptroller, DGS Legal Comptroller, DGS Legal, Attorney General ACM, Comptroller, DGS Legal, Attorney General ACM, CM, Comptroller, DGS Legal, Attorney General ACM, CM, CPO, Comptroller, DGS Legal, Attorney General
Sole Source Service	\$10K- \$25K \$25K - ∞	Agency Head, Comptroller, Agency Legal Agency Head, Comptroller, Agency Legal, Attorney General
Sole Source Supply	\$10K- ∞	DGS Dep. Sec. for Procurement, Comptroller, DGS Legal, Treasury, Sole Source Board, CPO

Important Note:

**If Non-Standard Terms & Conditions are checked OGC & Attorney General are added to the process.
Except for Independent Agencies - Attorney General only is added to the process**

Release Strategy (Approvals) - SRM Purchase Order Creation

Agency Purchase Order Types	Thresholds	Approval Strategy
Emergency Material	\$10K- ∞	CPO Exception: Independent Agencies – Agency Head Only For changes: No workflow required
Emergency Services	\$10K- ∞	CPO Exception: Independent Agencies – Agency Head Only For changes: No workflow required
Emergency PO OA OIT Services: Supplies:	\$10K - ∞ \$10K - ∞	Office of IT - Director of Services Office of IT – Director of Goods For changes: No workflow required
Auto-generated purchase order (Contract only)	\$0-\$10K	No release required.
Standard Material –Contract Reference	\$20K-∞	Comptroller
Standard Material – No Contract Reference	\$10K- ∞	Agency Head, Comptroller, Agency Legal
Standard Services – Contract Reference	\$20K-∞	Comptroller
Standard Services – No Contract Reference	\$10K-\$25K \$25K- ∞	Agency Head, Comptroller, Agency Legal Agency Head, Comptroller, Agency Legal, Attorney General
Sole Source Service	\$10K- \$25K \$25K - ∞	Agency Head, Comptroller, Agency Legal Agency Head, Comptroller, Agency Legal, Attorney General

Important Note:

**If Non-Standard Terms & Conditions are checked OGC & Attorney General are added to the process.
Except for Independent Agencies - Attorney General only is added to the process**