

SRM Procurement Document Approver Role

Purpose/Definition: The SRM Procurement Document Approver role is responsible for approving and rejecting any and/or all of the following procurement documents in SRM:

- Solicitations including IFB, RFP and RFQ document types created by agencies or DGS
- Purchase Orders for agencies under the Governor’s jurisdiction, independent agencies and DGS purchase orders created on behalf of agencies including standard, emergency, sole source, independent and purchase off contract
- Contract documents of all types including SRM local, global outline agreements and ITQs for agencies or DGS

Role Mapping Rules

Positions that receive the SRM Procurement Document Approver role cannot receive the following roles:

- SRM Agency Purchaser
- SRM DGS Commodity Specialist
- SRM DGS Auction Processor
- SRM Requisitioner
- Account Code Custodian
- Invoice Entry Processor
- Agency Material Master Service Master Records Processor

Please review Management Directive 205.37 Role Assignment, Security, and Internal Control Maintenance for guidance on role mapping conflicts.

Responsibilities

- Based on role assignment, approvers will review, edit, and approve or reject procurement documents in SRM. See Approver Categories chart for a description of role responsibilities.

Approver Categories Chart

Approver Role- Agency	Responsibilities
General Purpose Plant Agency Head – Supplies	Approve procurement documents outlined above for supplies when: <ol style="list-style-type: none"> 1. the purchase order contains line items with multiple locations (plants) or no plants 2. the contract type supplies is selected and multiple locations or no plant exists 3. the bid document is for supplies
General Purpose Plant Agency Head – Services	Approve procurement documents outlined above for supplies when: <ol style="list-style-type: none"> 1. the purchase order contains line items with multiple locations (plants) or no plants 2. the contract type services is selected and multiple locations or no plant exists 3. the bid document is for services

Approver Role- Agency	Responsibilities
Agency Head – Supplies	Approve procurement documents outlined above for supplies when: <ol style="list-style-type: none"> 1. the purchase order is plant specific and the line item is supply 2. the contract is plant specific and the document type is supplies 3. the bid document is for supplies
Agency Head – Services	Approve procurement documents outlined above for services when: <ol style="list-style-type: none"> 1. the purchase order is plant specific and the line item is service 2. the contract is plant specific and the document type is services 3. the bid document is for services
General Purpose Plant Agency Legal – Supplies	Approve procurement documents outlined above for supplies when: <ol style="list-style-type: none"> 1. the purchase order contains line items with multiple locations (plants) or no plants 2. the contract type supplies is selected and multiple locations or no plant exists 3. the bid document is for supplies
General Purpose Plant Agency Legal – Services	Approve procurement documents outlined above for supplies when: <ol style="list-style-type: none"> 1. the purchase order contains line items with multiple locations (plants) or no plants 2. the contract type services is selected and multiple locations or no plant exists 3. the bid document is for services
Agency Legal – Supplies	Approve procurement documents outlined above for supplies when: <ol style="list-style-type: none"> 1. the purchase order is plant specific and the line item is supply 2. the contract is plant specific and the document type is supplies 3. the bid document is for supplies
Agency Legal – Services	Approve procurement documents outlined above for services when: <ol style="list-style-type: none"> 1. the purchase order is plant specific and the line item is service 2. the contract is plant specific and the document type is services 3. the bid document is for services
Bid Invitation Ad Hoc Approver	Approve bid invitations for supplies and services for the RFQ document type only. If you are already role mapped as an approver, you do not need this role; this is only for those individuals who may be ad hoc on an RFQ but not approving other documents.

Approver Role – DGS	Responsibilities
DGS Director of BOP – Supplies	Approve procurement documents outlines above for supplies when: <ol style="list-style-type: none"> 1. the purchase order is DGS generated on behalf of an agency and associated with the delegated threshold per policy 2. the contract is DGS generated and the document type is supply 3. the bid document is an IFB
DGS Director of BOP – Services	Approve procurement documents outlines above for services when: <ol style="list-style-type: none"> 1. the purchase order is DGS generated on behalf of an agency and associated with the delegated threshold per policy 2. the contract is DGS generated and the document type is service 3. the bid document is an RFP
DGS Legal – Supplies	Approve procurement documents outlines above for supplies when: <ol style="list-style-type: none"> 1. the purchase order is DGS generated on behalf of an agency and associated with the delegated threshold per policy 2. the contract is DGS generated and the document type is supply 3. no bid approval required for legal on an IFB
DGS Legal – Services	Approve procurement documents outlines above for services when: <ol style="list-style-type: none"> 1. the purchase order is DGS generated on behalf of an agency and associated with the delegated threshold per policy 2. the contract is DGS generated and the document type is service 3. the bid document is an RFP

Approver Role – Comptroller	Responsibilities
Comptroller Approver -0100 – Attorney General	Approve procurement documents outlines above when: <ol style="list-style-type: none"> 1. the purchase order is created as a standalone document or associated with a contract and over the thresholds defined by procurement policy 2. the contract is agency generated, DGS generated and associated with the thresholds and activities defined by procurement policy
Comptroller Approver -0200 – Central Services	Approve procurement documents outlines above when: <ol style="list-style-type: none"> 1. the purchase order is created as a standalone document or associated with a contract and over the thresholds defined by procurement policy 2. the contract is agency generated, DGS generated and associated with the thresholds and activities defined by procurement policy

Approver Role – Comptroller	Responsibilities
Comptroller Approver -0300 – LCB	Approve procurement documents outlines above when: <ol style="list-style-type: none"> 1. the purchase order is created as a standalone document or associated with a contract and over the thresholds defined by procurement policy 2. the contract is agency generated, DGS generated and associated with the thresholds and activities defined by procurement policy
Comptroller Approver -0400 – LECS	Approve procurement documents outlines above when: <ol style="list-style-type: none"> 1. the purchase order is created as a standalone document or associated with a contract and over the thresholds defined by procurement policy. 2. the contract is agency generated, DGS generated and associated with the thresholds and activities defined by procurement policy
Comptroller Approver -0500 – PennDOT	Approve procurement documents outlines above when: <ol style="list-style-type: none"> 1. the purchase order is created as a standalone document or associated with a contract and over the thresholds defined by procurement policy 2. the contract is agency generated, DGS generated and associated with the thresholds and activities defined by procurement policy
Comptroller Approver -0600 – PHHS	Approve procurement documents outlines above when: <ol style="list-style-type: none"> 1. the purchase order is created as a standalone document or associated with a contract and over the thresholds defined by procurement policy 2. the contract is agency generated, DGS generated and associated with the thresholds and activities defined by procurement policy
Comptroller Approver -0700 – PPR	Approve procurement documents outlines above when: <ol style="list-style-type: none"> 1. the purchase order is created as a standalone document or associated with a contract and over the thresholds defined by procurement policy 2. the contract is agency generated, DGS generated and associated with the thresholds and activities defined by procurement policy

SRM Procurement Document Approver - continued

Required Knowledge, Skills, and Abilities

- Broad knowledge of Procurement Code and Purchasing Policy
- Broad knowledge of solicitation requirements
- Knowledge of purchase order and contract workflow
- Knowledge of approval criteria for appropriate document types associated with the role
- Ability to use computer

Tools

- SAP—SRM

Processes & Transactions

- Purchasing
 - Approval Processing

Training Prerequisites

The following knowledge is required before employees can enroll in SRM training. If an employee who will perform a To-Be role is not knowledgeable in any of the below areas, pre-requisite training is available through the CTC.

- PC and Windows User Fundamentals
- Microsoft Software
 - Microsoft Word (Word Processor)
 - Microsoft Excel (Spreadsheet)
 - Microsoft Outlook (Email)
 - Internet Browsers
 - Windows

Procurement Document Approver -

Course Name	Course	Hours	Del. Media
Fundamentals	SRM Sourcing Fundamentals	1.00	WBT
	SRM Navigation & Overview	0.15	WBT
Approver	SRM 7.0 Procurement Document Approver	1.00	WBT
		<u>2.15</u> hours total	