

Deleting a Solicitation (RFx)

Deletion must occur in the Personal Object Worklist (POWL). Deletion will not work in Display SRM Document. The SRM Solicitation must be in a “Saved” status, it cannot be in a “Published,” “Rejection Pending” or any other status. Once the PUBLISH button is selected, the DELETE button will no longer be an option.

Follow the steps below to delete a Solicitation (RFx) document in SRM.

1. Select the RFx Role in the left navigation
2. Enter the applicable solicitation (RFx) number or other search criteria
3. When the results display, select the gray box next to the applicable solicitation (RFx) number. Make sure that it is in a “Saved” status.
 - a. Also make sure to delete all line items associated with the solicitation
4. Notice that the DELETE “One-step” action button is now active for you to select. Select the DELETE button to delete the document.
 - a. The solicitation will remain in the system, but will show as “Deleted”

The screenshot shows the SRM interface with the following search criteria:

- Solicitation Number: [] To []
- RFx Type: Invitation For Bid
- Name of RFx: []
- Solicitation Status: []
- Processed Since: Last 90 Days
- Purchasing Organization: []
- Product Category: []
- Submission Deadline: []
- My RFx:
- Purchase Group: []
- Number of RFx responses: [] To []
- Supplier:
- Item Product: []

The table below shows the search results:

RFx Number	RFx Name	Type	Status	RFx Category	Purchasing Organization	Submission Deadline
<input checked="" type="checkbox"/> 0100038102	P0066292 04/18/2016 11:52	BID	Saved		COPA Purchasing Organization	
<input type="checkbox"/> 0100038121	35X134652 - Mine Safety Comm Systems	BID	Published		COPA Purchasing Organization	04/25/2016
<input type="checkbox"/> 0100038111	Meat & Dairy Products for SCI-Walmart	BID	Published		Corrections Purchasing Organization	05/02/2016
<input type="checkbox"/> 0100038101	P00514646 04/18/2016 07:34	BID	Saved		COPA Purchasing Organization	05/11/2016
<input type="checkbox"/> 0100038092	P00102400 04/15/2016 09:43	BID	Saved		COPA Purchasing Organization	
<input type="checkbox"/> 0100038091	P00102400 04/15/2016 09:27	BID	Saved		COPA Purchasing Organization	
<input type="checkbox"/> 0100038085	Animal Control Services, SWVC, TLR, 4/15/16	BID	Saved		DMVA Purchasing Organization	04/22/2016
<input type="checkbox"/> 0100038084	1149-Greene Boiler Services, 2016-17	BID	Published		Corrections Purchasing Organization	05/26/2016
<input type="checkbox"/> 0100038083	Animal Control Services, SWVC, TLR, 4/15/16	BID	Release Rejected		DMVA Purchasing Organization	04/22/2016

Notice that if the document has a “Published” status, upon being selected, the DELETE “One-step” action button does not become activated. This is because you do not have the ability to delete a document once it has been published.

View: [Standard View] Create RFX Copy Display Edit Delete Publish Responses and Awards Print Preview Refresh Export							
RFX Number	RFX Name	Type	Status	RFX Category	Purchasing Organization	Submission Deadline	
6100038122	P00068292 04/18/2016 11:52	BID	Saved		COPA Purchasing Organization		
6100038121	35X134652 - Mine Safety Comm Systems	BID	Published		COPA Purchasing Organization	04/25/2016	
6100038111	Meat & Dairy Products for SCI-Waymart	BID	Published		Corrections Purchasing Organization	05/02/2016	
6100038101	P00514646 04/18/2016 07:34	BID	Saved		COPA Purchasing Organization	05/11/2016	

Notice that if the document has a “Release Rejected” status, upon being selected, the DELETE “One-step” action button does not become activated. That is because the Publish button was selected to send this document into the approval workflow, and again once the document has been published you do not have the ability to delete it.

View: [Standard View] Create RFX Copy Display Edit Delete Publish Responses and Awards Print Preview Refresh Export							
RFX Number	RFX Name	Type	Status	RFX Category	Purchasing Organization	Submission Deadline	
6100038084	1149-Greene Boiler Services, 2016-17	BID	Published		Corrections Purchasing Organization	05/26/2016	
6100038083	Animal Control Services, SWVC, TLR, 4/15/16	BID	Release Rejected		DMVA Purchasing Organization	04/22/2016	
6100038082	Hydraulic Simulator	BID	Published		COPA Purchasing Organization	05/05/2016	

If you will not be using a solicitation and it has been published, go through the proper legal process to end the solicitation process and then leave the solicitation in the system with a message in the internal note as to why it is not being utilized.