

Deleting a Solicitation (RFx)

This procedure will provide guidance on how to delete an SRM Solicitation prior to it being published to the PA Supplier Portal.

Deletion of a Solicitation must occur in the Personal Object Worklist (POWL). Display SRM Documents will not provide the option to delete. 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 in SRM.

1. Select the RFx Role in the left navigation
2. Enter the applicable Solicitation number or other search criteria
3. When the results display, select the gray box next to the applicable Solicitation number.
 - a. Make sure the Solicitation is in a “Saved” status.
 - b. Make sure to delete all line items associated with the Solicitation
4. Notice that the Delete “One-step” action button is now active for select. Select the Delete button to delete the Solicitation.
 - 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 action bar includes: 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
#100038122	P00568282 04/18/2016 11:52	BD	Saved		COFA Purchasing Organization	
#100038123	35X134852 - Mine Safety Comm Systems	BD	Published		COFA Purchasing Organization	04/25/2016
#100038111	Meat & Dairy Products for SD-Walmart	BD	Published		Corrections Purchasing Organization	05/02/2016
#100038101	P00514646 04/18/2016 07:34	BD	Saved		COFA Purchasing Organization	05/11/2016
#100038052	P00102400 04/15/2016 09:43	BD	Saved		COFA Purchasing Organization	
#100038061	P00102400 04/15/2016 09:27	BD	Saved		COFA Purchasing Organization	
#100038069	Animal Control Services, SWVC, TLR, 4/15/16	BD	Saved		DMVA Purchasing Organization	04/22/2016
#100038004	1149-Greene Boiler Services, 2016-17	BD	Published		Corrections Purchasing Organization	05/26/2016
#100038003	Animal Control Services, SWVC, TLR, 4/15/16	BD	Release Rejected		DMVA Purchasing Organization	04/23/2016

Note: If the Solicitation has a “Published” status, upon being selected, the Delete “One-step” action button does not become activated. The reason for this is that users do not have the ability to delete a Solicitation 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					

Note: If the Solicitation has a “Release Rejected” status, upon being selected, the Delete “One-step” action button does not become activated. The reason for this is that the Publish button was selected to send the Solicitation into the approval workflow, and once the Solicitation has been published users 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 a user will not be utilizing a Solicitation that has been published, they should go through the proper legal process (addendum) to end the Solicitation process. The Solicitation will remain in the system, and users should enter a reason for the cancellation in the internal note.