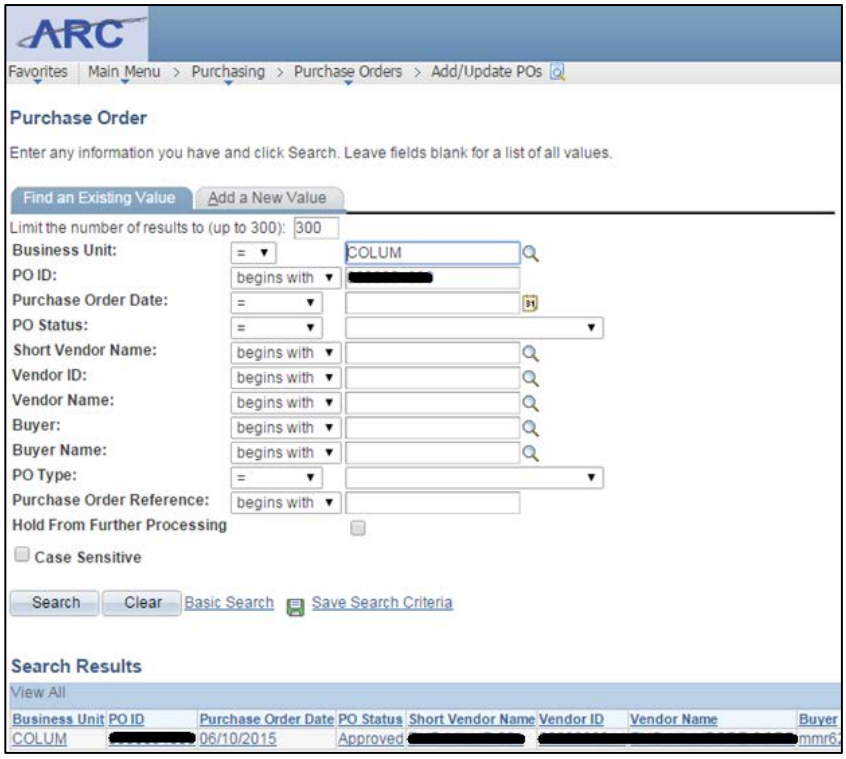
JOB AID

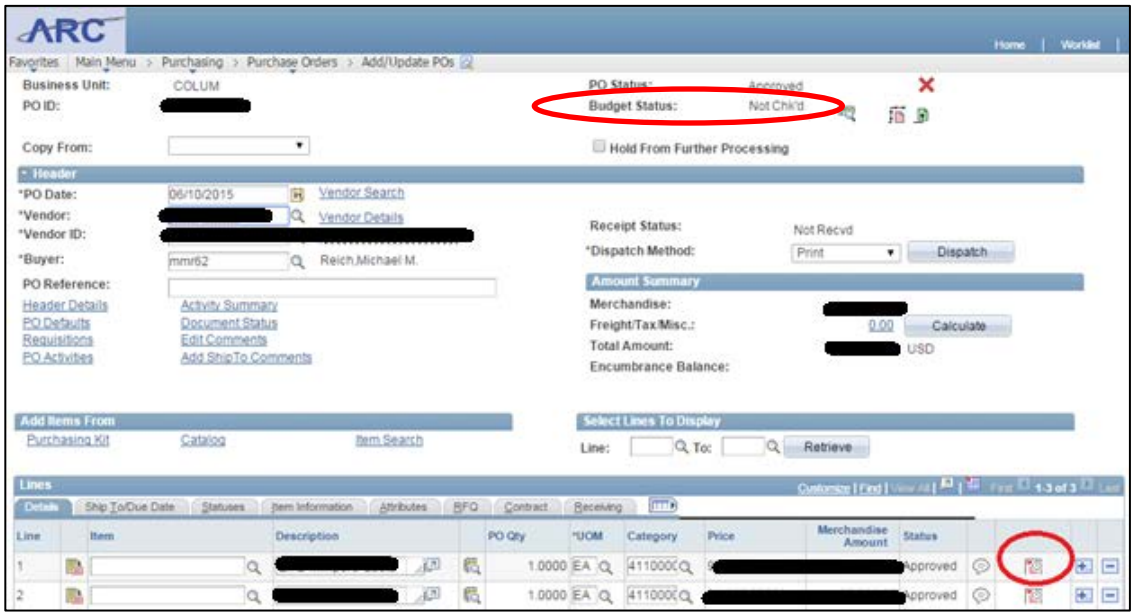
Identifying and Correcting Purchase Orders with a ChartField Status: Recycled

The purpose of this job aid is to help users identify and correct Purchase Orders containing distribution lines with a RECYCLED status.

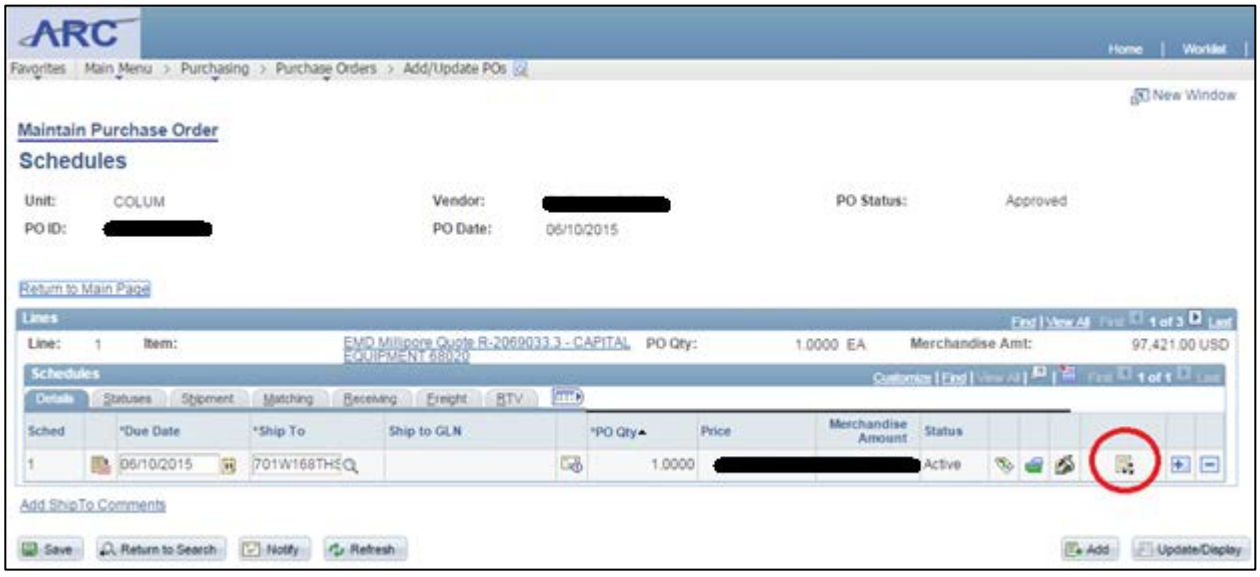
1) RECYCLED status is an indicator that one or more ChartFields in the ChartString are **invalid**. PO's will have this status if the ChartField is inactivated after the initiating requisition is approved by the department (the PO may still be dispatched but it will be created in RECYCLED status) or if a ChartField value is inactivated after the PO is dispatched.
    a. PO Distribution Line(s) with inactive ChartField values will be in a Recycled status.
    b. The PO Budget status will not set to Not Chk'd. It will not be Valid until the Recycled status is cleared.
    c. The PO will not be able to have vouchers processed against it until the Recycled status has been resolved.
2) Departments will receive notification of POs that have a ChartField Recycled Error in the Procurement weekly e-mail alert.
3) Departments can determine which specific distribution lines are in error by following the steps below:
    a. Navigation: Main Menu > Purchasing > Purchase Order Add/Update PO



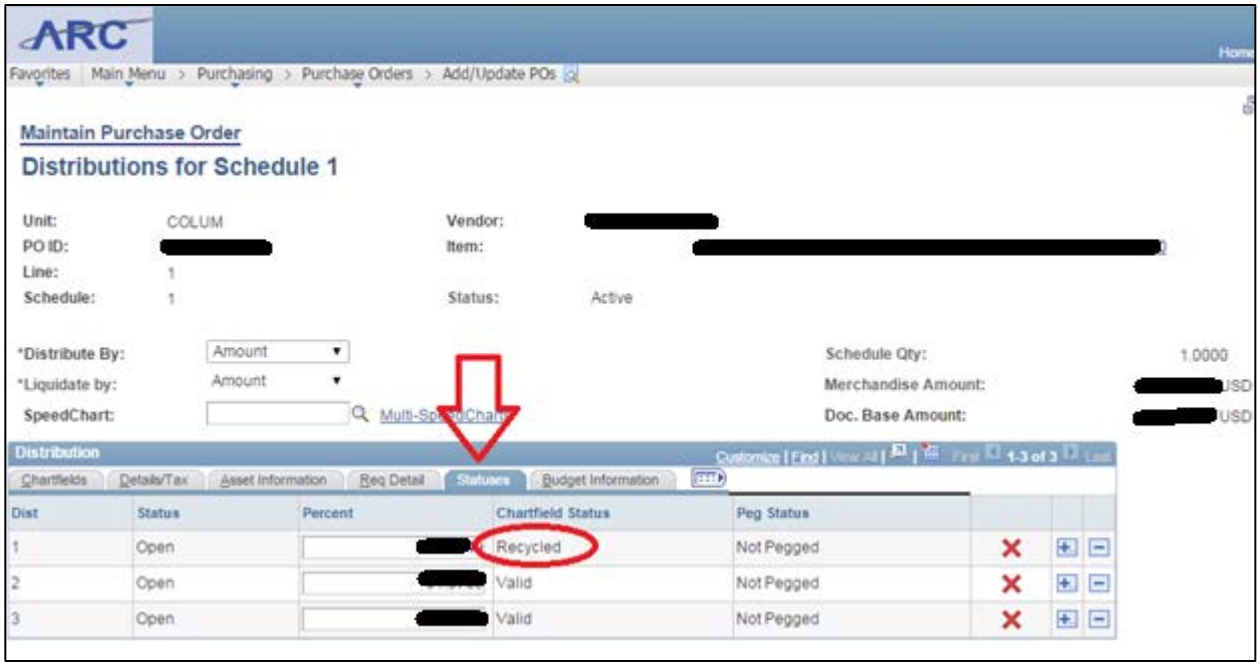
b) Budget Status will appear as **Not Chk'd**. Click on **SCHEDULE** icon.



c) Click on ChartField Distribution **icon** (circled below in red)



d) Click on the **Statuses** tab to see which Distribution Line is in **Chartfield Status: Recycled**. You may need to check the Distribution Lines on multiple PO lines before you find the ChartField in Recycled status.



4) The Recycle error on the PO can be fixed in one of three ways:
   a. Perform a Financial Change Order to update the chart string on the distribution line – see the following job aid for instructions on how to do this: http://finance.columbia.edu/files/gateway/content/training/job_aids/change_order_creating_financial_change_order_job_aid.pdf
   b. Close the existing PO and create a new requisition
   c. Work with SPF or the Controller's Office to activate the ChartField value, if appropriate

If you have any questions, please contact the Finance Service Center. You can log an incident or request a service by using a self-service web form, or you can contact the Finance Service Center by phone: (212) 854-2122. See their website for hours of operation.