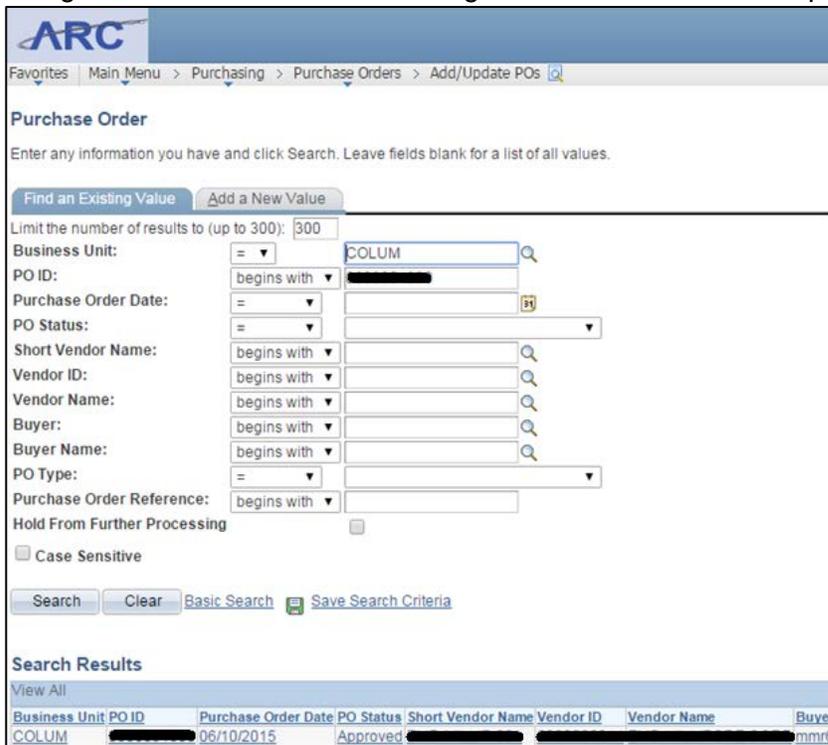


## Identifying and Correcting Purchase Orders with a ChartField Status: Recycled

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



The screenshot shows the ARC 'Purchase Order' search interface. It includes a search form with various fields and a search results table.

**Search Form Fields:**

- Business Unit: = [COLUM] [Search]
- PO ID: begins with [REDACTED]
- Purchase Order Date: = [ ] [BY]
- PO Status: = [ ] [v]
- Short Vendor Name: begins with [ ] [Search]
- Vendor ID: begins with [ ] [Search]
- Vendor Name: begins with [ ] [Search]
- Buyer: begins with [ ] [Search]
- Buyer Name: begins with [ ] [Search]
- PO Type: = [ ] [v]
- Purchase Order Reference: begins with [ ]
- Hold From Further Processing:
- Case Sensitive:

**Search Results Table:**

Business Unit	PO ID	Purchase Order Date	PO Status	Short Vendor Name	Vendor ID	Vendor Name	Buyer
COLUM	[REDACTED]	06/10/2015	Approved	[REDACTED]	[REDACTED]	[REDACTED]	mmr6

# JOB AID



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

ARC  
Home | World |  
Favorites | Main Menu > Purchasing > Purchase Orders > Add/Update POs

Business Unit: COLUM  
PO ID: [REDACTED]  
PO Status: Approved  
Budget Status: Not Chk'd  
Hold From Further Processing:

Copy From: [REDACTED]

**Header**  
\*PO Date: 06/10/2015  
\*Vendor: [REDACTED]  
\*Vendor ID: [REDACTED]  
\*Buyer: mm62 Reich, Michael M.  
Receipt Status: Not Recvd  
\*Dispatch Method: Print Dispatch

**Amount Summary**  
Merchandise: [REDACTED]  
Freight/Tax/Misc.: 0.00  
Total Amount: [REDACTED] USD  
Encumbrance Balance: [REDACTED]

**Add Items From**  
Purchasing Kit Catalog Item Search

**Select Lines To Display**  
Line: [REDACTED] To: [REDACTED] Retrieve

Line	Item	Description	PO Qty	UOM	Category	Price	Merchandise Amount	Status	Actions
1	[REDACTED]	[REDACTED]	1.0000	EA	411000	[REDACTED]	[REDACTED]	Approved	[REDACTED] [REDACTED] [REDACTED] [REDACTED]
2	[REDACTED]	[REDACTED]	1.0000	EA	411000	[REDACTED]	[REDACTED]	Approved	[REDACTED] [REDACTED] [REDACTED] [REDACTED]

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

ARC  
Home | World |  
Favorites | Main Menu > Purchasing > Purchase Orders > Add/Update POs

**Maintain Purchase Order**  
**Schedules**  
Unit: COLUM Vendor: [REDACTED] PO Status: Approved  
PO ID: [REDACTED] PO Date: 06/10/2015

[Return to Main Page](#)

**Lines**  
Line: 1 Item: EMD Millipore Quote R-2069033.3 - CAPITAL EQUIPMENT 880X0 PO Qty: 1.0000 EA Merchandise Amt: 97,421.00 USD

Sched	*Due Date	*Ship To	Ship to GLN	*PO Qty	Price	Merchandise Amount	Status	Actions
1	06/10/2015	701W168THE		1.0000	[REDACTED]	[REDACTED]	Active	[REDACTED] [REDACTED] [REDACTED] [REDACTED]

**Schedules**  
Add ShipTo Comments

Save Return to Search Notify Refresh Add Update/Display

# JOB AID



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.

The screenshot shows the 'Maintain Purchase Order' interface for 'Distributions for Schedule 1'. The 'Statuses' tab is active. A table lists three distribution lines:

Dist	Status	Percent	Chartfield Status	Peg Status
1	Open		Recycled	Not Pegged
2	Open		Valid	Not Pegged
3	Open		Valid	Not Pegged

- 4) The Recycle error on the PO can be fixed in one of three ways:
- 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](http://finance.columbia.edu/files/gateway/content/training/job_aids/change_order_creating_financial_change_order_job_aid.pdf)
  - Close the existing PO and create a new requisition
  - 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.