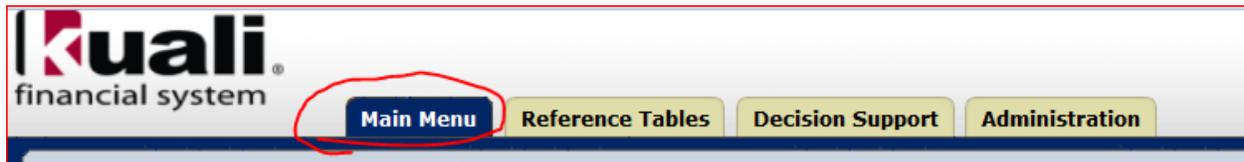# HOW TO INITIATE AN ELR FOR FIRST TIME LOANS
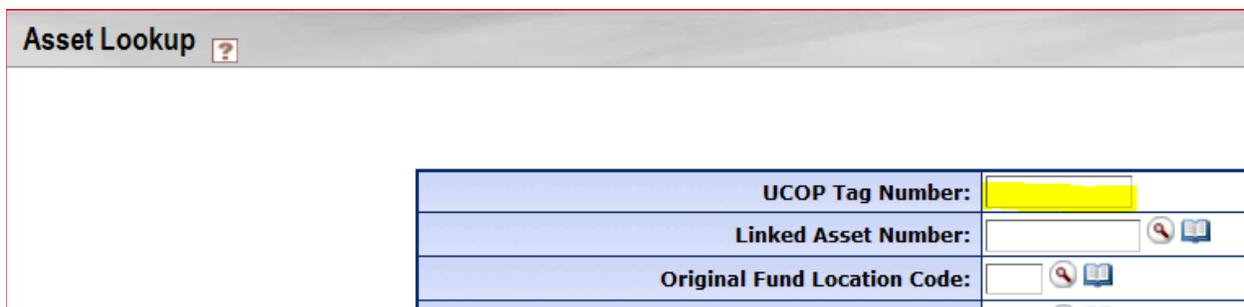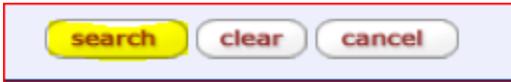
Sign into Kuali

From the Main Menu screen, click on <u>Asset</u> (under the Capital Asset Management section)
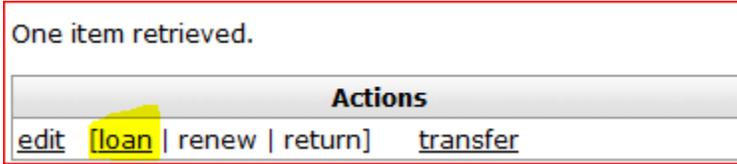

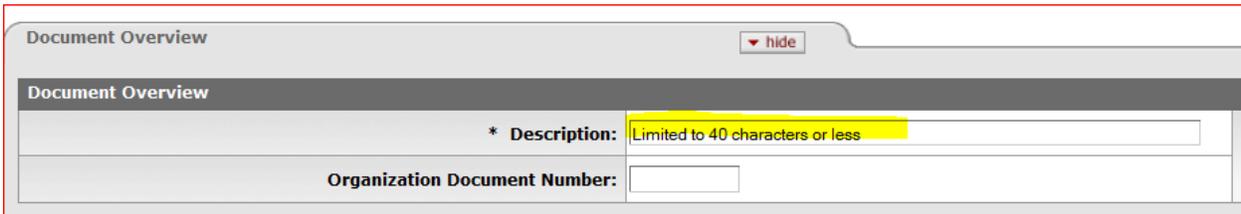In the UCOP Tag number field, type in the UCOP Tag # (formerly known as the Asset number) then hit *search*

In the Actions column, click on *loan*

Every document in Kuali requires a 40 character or less "description."

You may put anything you like, but bear in mind this is like the "subject header" of an email – it is what other approvers will see in their KFS inbox and what other KFS users would see if they searched for your document. The description is a searchable field as well, so you are encouraged to spell correctly and put information that will either identify the purpose of the document or identify the asset. For example, "Loan [the UCOP number] to [the borrower]."

The Explanation and Organization Document Number fields are optional and can be filled with whatever information you would like.
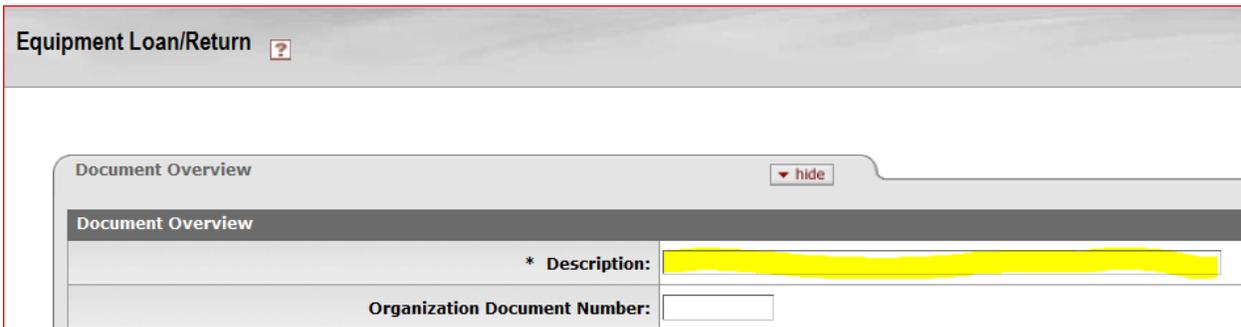
If the borrower is a UCD employee, they will have a Borrower ID. Clicking on the magnifying glass will bring up a search screen for you to lookup their name and return it.
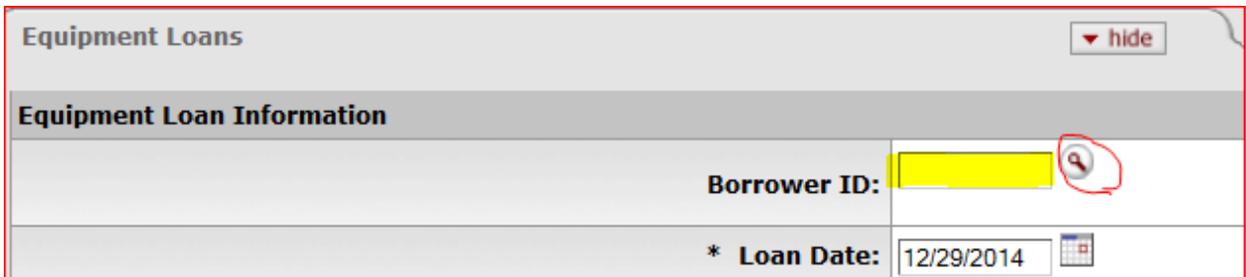
If they are not a UCD employee, they are considered an outside borrower. Please fill out this field with a first and last name:

Outside of University Borrower Name:	Dr. John Smith
* Expected Return Date:	

Whether the borrower is internal or external, the "Expected Return Date" cannot be any further into the future than three years. Policy prohibits giving away (permanently loaning) equipment of any kind, including obsolete or non-working equipment. If your borrower has a legitimate need to borrow the asset beyond three years, you will need to do a renewal.

If the Borrower is external, you will need to fill out the following fields where indicated.

Borrower's Address ▾ hide

Borrower

* **Address:**	
* **City:**	
* **State:**	
* **Postal Code:**	
Country:	
Phone:	

For the policy questions, please choose the answer appropriate to the asset's funding and title **for both questions**. The two choices <u>for each question</u> are as follows:

Question 1:
   a)   This is an intercampus or external loan. I confirm the department has secured approval from the department head and I have attached a copy of the approval to this document (for example signed approval letter, EIMR, copy of email, etc.)
   b)   This is not an intercampus or external loan.

Question 2:
   a)   This is an intercampus or external loan. I confirm the department has secured approval from the Sponsor and I have attached a copy of the approval to this document (for example signed approval letter, EIMR, copy of email, etc.)
   b)   The asset being loaned is University title.

Attach the appropriate documentation. Click on Add.

Notes and Attachments			
	Posted Timestamp	Author	* Note Text
add:			

Actions
add

Click *Submit.*

The doc will route to your fiscal officer, then EQ.

Congratulations! You're done!