HOW TO DO AN ASSET EDIT DOC (aka CASM doc)

Sign into Kuali (aka KFS)

In the middle column, under **Capital Asset Management System**, click on *Asset*

In the resulting Asset Lookup screen, type in the UCOP tag number (ex. 20033001267) then click on Search

SIDENOTE: You can process three types of documents from here: an Edit doc, a Loan/Renew/Return doc and the Transfer doc. You can also do an 'asset inquiry' by clicking on the asset number. The underlining tells you it is a link. The underlining of the column headers indicates that they can be sorted.

SIDENOTE: If you ever want to use the Doc Search to find an Edit doc you've already done, the *Document Type* is CASM.

Click on *Edit*

One item retrieved.

Actions	Asset Number	UCOP Tag Number	Custodial Code	Building Code	Asset Status Code	UCOP Disposal Code	Asset Description	Asset Type Code	In-Service Date
edit [loan | renew | return] transfer	538809	20033001267	9845	9519	A		SERVER, IBM X SERIES 345, XEON PROCESSOR, 6 EA 18.2GB HARD DRIVES	H0765	03/05/2003

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

Document Overview   ▼ hide

Document Overview

* **Description:** Limited to 40 characters or less

Organization Document Number:

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 an asset that is being edited, a good description might be "Add serial number," "Correct Model Number," Update Building and Room Number," etc. For example: "Add serial number for 20143001234".

The **Explanation** field is **not** mandatory but is much bigger and is an excellent place to put a lengthier reason for the doc, a contact person's info or any other data that would be helpful for you later on. The grey triangle of dots indicates that you can make the field bigger by dragging it:

Explanation:

The **Organization Document Number** is also not mandatory, is limited to 10 characters and may be used for whatever you like (like a PO number or the loan number for example) or left blank as you choose. It is also a searchable field.

Organization Document Number: 12345

SIDENOTE: All of the current information is in the left column designated as "Old" [information]. The New information goes in the right column. Any field with a white box is editable by you with the exception of the Asset Status Code. If you were to try to change that, you would get an error message. Here are all the fields with white boxes:

Asset Detail Information Tab:

Asset Number:	538809
Custodial Code:	9845
Organization Owner Chart Of Accounts Code:	H
Organization Owner Account Number:	1009845
Organization Code:	HSYS
Linked Asset Number:	🔍 📖
Original Fund Location Code:	3
Original Fund Number:	63000
Current Fund Location Code:	3
Current Fund Number:	63000
● **Principal Investigator:**	🔍
Agency:	🔍 📖
Acquisition Type Code:	New
UC Acquisition Type Code:	31
* **Asset Status Code:**	A 🔍 📖
* **Asset Condition:**	N1 🔍 📖
Asset Description:	SERVER, IBM X SERIES 345, XEON PROCE DRIVES
Asset Type Code:	H0765
Vendor Name:	
● **Manufacturer:**	IBM
● **Model Number:**	X SERIES 345
● **Serial Number:**	
UCOP Tag Number:	20033001267
Federal Property Number:	
Create Date:	02/21/2003
In-Service Date:	03/05/2003
Depreciation Date:	04/01/2003
Total Cost:	8,322.74
Federal Contribution:	0.00

Principal Investigator – this is usually for departments that have researchers, but it will accept any KFS User ID Name. If you feel like it would be helpful to you, please use it.
Agency - this is where the sponsoring agency that provided the grant funds for the equipment would go.
Asset Status Code – as noted above, this is not editable by the departments and if you were to try to change that, you would get an error message.
Asset Condition – this is where you update the condition of the asset when doing your inventory. It has a magnifying glass for you to pull up all the condition codes available to you.
Manufacturer
Model Number
Serial Number – PLEASE FILL THIS FIELD OUT WHENEVER POSSIBLE!
Federal Property Number – if you had something on loan from the Federal government, their property number would go here.

Asset Location Tab:

[For on campus addresses]

New	
On Campus	
Campus:	DV
● Building Code:	[highlighted field] 🔍 📖
● Building Room Number:	[highlighted field] 🔍 📖
Building Sub Room Number:	[field]

[Needed for off campus addresses only]

Off Campus	
● Name:	[field]
● Address:	[field]
● City:	[field]
● State:	[field] 🔍
● Postal Code:	[field] 🔍
● Country:	[field] ▾ 🔍

Organization Information Tab: these are all for the department's use. For the last one, **Organization Asset Type Identifier,** no blank spaces are allowed; separate words with an underscore)

● Organization Inventory Name:	[field]
Asset Representative Principal Name:	rhenwood - Henwood, Raymond F
Asset Representative Name:	Henwood, Raymond F
● Organization Text:	[text area]
● Organization Tag Number:	[field]
● Organization Asset Type Identifier:	[field]
Receive Date:	03/05/2003

Components Tab:
All of these boxes look editable, but only some should be changed by the department. They are highlighted in yellow.

Component Number:	
* UC Acquisition Type Code:	
Component In Service Date:	
Component Receive Date:	
Component Purchase Order Number:	
* Component Description:	
• Component Condition Code:	
Component Vendor Name:	
• Component Manufacturer Name:	
• Component Model Number:	
• Component Serial Number:	
• Component Organization Text:	
Component Estimated Lifetime Limit:	
Federal Property Number:	
Active Indicator:	
	add

If you have notes or attachments you wish to add, 'show' the Notes and Attachments Tab and add them:

View Asset Depreciation   ▶ show

Notes and Attachments (0)   ▶ show

Notes and Attachments (0)   ▼ hide

Notes and Attachments

	Posted Timestamp	Author	* Note Text	Attached File	Actions
add:				Browse... No file selected. / CANCEL	add

Ad Hoc Recipients   ▶ show

If you wish to ad-hoc route it to someone for *approval,* you must do so before you submit the document. Otherwise you may ad-hoc for FYI purposes both before or after submitting. If you don't know the person's user ID, use the magnifying glass to look them up. If you don't need to ad-hoc route it to anyone, just skip this step:

Ad Hoc Recipients   ▼ hide

Ad Hoc Recipients

Person Requests:

* Action Requested	* Person	Actions
APPROVE		add

SIDENOTE: The tabs that you have edited will have a gold asterisk next to them:

Document Overview		
Asset Detail Information		
Asset Location ✳		
Organization Information		
Payments		
Payments Lookup		
Asset Depreciation Information		

Click on *Submit*. You're all done!

(**submit**) (save) (close) (cancel)

SIDENOTE: In KFS, only the Bargain Barn, Equipment Management and custodial code 'officials' (asset reps, asset rep delegates, department head, and department head delegate) can see the "Actions" column for the assets in 'their' custodial code. The first snapshot shows what the asset rep would see for 9845 (his code); the second snapshot shows what he would see for a custodial code where he/she is not affiliated - the Actions column is missing.

176 items retrieved, displaying 1 to 100.[First/Prev] **1**, 2 [Next/Last]

Actions			Asset Number	UCOP Tag Number	Custodial Code	
edit [loan	renew	return]	transfer	568096	20133000054	9845	9
edit [loan	renew	return]	transfer	568097	20133000055	9845	9
edit [loan	renew	return]	transfer	569105	20133000056	9845	9
edit [loan	renew	return]	transfer	569106	20133000057	9845	9
edit [loan	renew	return]	transfer	569107	20133000058	9845	9
edit [loan	renew	return]	transfer	569108	20133000059	9845	9
edit [loan	renew	return]	transfer	569109	20133000060	9845	9
edit [loan	renew	return]	transfer	569110	20133000061	9845	9
edit [loan	renew	return]	transfer	569111	20133000062	9845	9

175 items retrieved, displaying 1 to 100.[First/Prev] **1**, 2 [Next/La

Asset Number	UCOP Tag Number	Custodial Code
531798	20003007177	9361
538984	20023005720	9361
538985	20023005723	9361
536139	20023002638	9361
536140	20023002639	9361
544406	20043001613	9361
546067	20043002443	9361
544077	20033002411	9361
540919	20023008035	9361
540920	20023008040	9361
542848	20033004734	9361