HOW TO DO AN ASSET LOCATION – GLOBAL DOC (aka ALOC doc)

Sign into Kuali (aka KFS)

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

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 assets that are being transferred from one building to another, a good description might be “Trsf assets to [Name of the Building].”

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:

The Organization Document Number is limited to 10 characters and may be used for whatever you like (like a PO number or the loan number for example). It is also a searchable field.
Next, click on the *Lookup/Add Multiple Asset Lines* magnifying glass:

If all your assets are in one custodial code and one building, fill out those two pieces of information in the lookup screen, then click on *Search*:

![Asset Lookup](image)

You can re-sort your list by clicking on the up/down arrow icons in any of the columns:

<table>
<thead>
<tr>
<th>Select?</th>
<th>Asset Number</th>
<th>UCOP Tag Number</th>
<th>Custodial Code</th>
<th>Building Code</th>
<th>Asset Status Code</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>515330</td>
<td>953006949</td>
<td></td>
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<tr>
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<tr>
<td></td>
<td>572937</td>
<td>20143003441</td>
<td></td>
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</tr>
</tbody>
</table>

The next thing you need to do is choose the asset / UCOP numbers you are transferring by clicking on *Select* across from the ones you want. Note that the asset number is right next to the UCOP Tag number.

If you have already narrowed your results by adding in enough parameters in the “lookup” field that all of your returned results are to be moved, you can click on the first or third choice below; otherwise, just hunt for the ones that are going to be moved. When you have all the assets selected, click on the last choice, “return selected.”
All the assets that you selected have been returned to your document with their current building and room number. You will need to manually change every room number to the new room number (and, if switching buildings, the new building code as well):

![Asset Screenshots]

If you do not know either the building or the room number codes, click on the magnifying glass across from the code you are looking for (either building or room). This will bring you to the Building or Room Lookup respectively.

**SIDENOTE:** The room number must be recognized by KFS. Room numbers such as “0,” “unk,” “yard,” “bsmt” etc. are not valid and will not be recognized.

If you are not changing buildings or have already entered the new building code, click on the magnifying glass across from the Room Number field to bring up the Room Lookup Screen:

![Room Lookup Screen]

With all fields blank except for your new Building Code, click on Search.
Your return results will vary depending on how many rooms are in the building:

220 items retrieved, displaying 1 to 100.[First/Prev] 1, 2, 3 [Next/Last]

Click on “return value” across from the room number you need.

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

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:

Click on Submit. You’re all done!