HOW TO DO AN ASSET TRANSFER DOC (aka AT 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. 20113001058) 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 a Transfer doc you’ve already done, the **Document Type** is AT.

Click on **Transfer**

<table>
<thead>
<tr>
<th>Actions</th>
<th>Asset Number</th>
<th>UCOP Tag Number</th>
<th>Custodial Code</th>
<th>Building Code</th>
<th>Asset Status Code</th>
<th>UCOP Disposal Code</th>
<th>Asset Description</th>
<th>Asset Type Code</th>
<th>In-Service Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>edit</td>
<td>55956</td>
<td>20113001058</td>
<td>9845</td>
<td>9510</td>
<td>A</td>
<td>NETWORK EXTENDER, CISCO NEXUS 2232</td>
<td>H0763</td>
<td>05/01/2011</td>
<td></td>
</tr>
</tbody>
</table>

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 an asset that is being transferred, a good description might be “Trsf 20143001234 to 9993.”

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.

Before you can submit an AT doc, you’ll need to know the custodial code, building code and room number of where it is going. Once you know this information:

Type in the destination custodial code. If you needed to look it up, you can use the magnifying glass. For example 9993.
Then enter the building and room number:

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 either 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!
A new thing about KFS AT docs, is that they now automatically route to the incoming asset rep for approval and your document is not final until they have approved it. Your document may have been successfully submitted, but until the incoming rep approves it, it will be “enroute.” Once they (and other subsequent approvers) approve, the status will say “final:”

<table>
<thead>
<tr>
<th>Document Id</th>
<th>Status</th>
<th>Document</th>
</tr>
</thead>
<tbody>
<tr>
<td>31337953</td>
<td>FINAL</td>
<td>TRSF ASSET TO EXCESS SURPLUS</td>
</tr>
</tbody>
</table>

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.