

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

Asset Lookup ? Backdoor Id rhenwo

UCOP Tag Number:	20113001058
Linked Asset Number:	<input type="text"/>
Original Fund Location Code:	<input type="text"/>
Current Fund Location Code:	<input type="text"/>
Agency:	<input type="text"/>

search clear cancel

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*

One item retrieved.

<u>Actions</u>	<u>Asset Number</u>	<u>UCOP Tag Number</u>	<u>Custodial Code</u>	<u>Building Code</u>	<u>Asset Status Code</u>	<u>UCOP Disposal Code</u>	<u>Asset Description</u>	<u>Asset Type Code</u>	<u>In-Service Date</u>
edit loan renew return transfer	565956	20113001058	9845	9519	A		NETWORK EXTENDER, CISCO NEXUS 2232	H0765	05/01/2011

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

Document Overview ▼ hide

Document Overview

* Description:

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 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:

Explanation:

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.

Organization Document Number:

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.

Asset Transfer Information		▼ hide	
Old		New	
Transfer from Originating Organization		Transfer to Receiving Organization	
Custodial Code:	9845	* Custodial Code:	9993
Organization Owner Chart Of Accounts Code:	H	* Organization Owner Chart Of Accounts Code:	H
Organization Owner Account Number:	1009845	* Organization Owner Account Number:	1009894
Organization Code:	HSYS	* Organization Code:	HSYS
Interdepartmental Sale			
Interdepartmental Sales Indicator:	<input type="checkbox"/>		
Transfer Of Funds Financial Document Number:	<input type="text"/>		

Then enter the building and room number:

Asset Location		▼ hide	
On Campus		Off Campus	
* Campus:	DV	Name:	<input type="text"/>
Building Code:	8125	Address:	<input type="text"/>
Building Room Number:	1030	City:	<input type="text"/>
Building Sub Room Number:	<input type="text"/>	State:	<input type="text"/>
		Postal Code:	<input type="text"/>
		Country:	<input type="text"/>

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:			<input type="text"/>	Browse... No file selected.	add
					CANCEL

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:

Ad Hoc Recipients			▼ hide
Ad Hoc Recipients			
Person Requests:			
* Action Requested	* Person	Actions	
APPROVE	<input type="text"/>	add	

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.”

Document Id	Status	Docum
31337953	FINAL	TRSF ASSET TO EXCESS SURPLUS

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
edit [loan renew return] transfer	568097	20133000055	9845
edit [loan renew return] transfer	569105	20133000056	9845
edit [loan renew return] transfer	569106	20133000057	9845
edit [loan renew return] transfer	569107	20133000058	9845
edit [loan renew return] transfer	569108	20133000059	9845
edit [loan renew return] transfer	569109	20133000060	9845
edit [loan renew return] transfer	569110	20133000061	9845
edit [loan renew return] transfer	569111	20133000062	9845

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

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