

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

Updated on 04/06/21

Sign into Kuali (aka KFS): kfs.ucdavis.edu

The screenshot shows the Kuali Financials navigation bar. At the top left is the UC Davis logo. To its right is the word "Financials". Above the "Financials" link is a search bar containing the URL "https://kfs.ucdavis.edu/". Below the logo and search bar are two small icons: a left arrow and a right arrow.

Go to **Capital Assets**, click on Asset

The screenshot shows the "Capital Assets" page in Kuali Financials. On the left is a sidebar with links like Home, Action List, Doc Search, Jump to..., Accounting, Accounts Payable, Accounts Receivable, Capital Assets (which is highlighted with a yellow box), Chart of Accounts, and More Items. The main content area has three columns: Activities, Administration, and Reference. The "Asset" item under Reference is also highlighted with a yellow box.

Activities	Administration	Reference
Plant Asset Activity	Asset Acquisition Type Asset Condition Asset Location Type Asset Payment Document Type Asset Retirement Reason Asset Status Asset Transaction Code Asset Transaction Type Asset Type Capital Asset Account Number EFA Fund Source	Asset Asset Custodial Code Asset Fabrication Asset Global (add) Asset Location Global Asset Payment Asset Retirement Global Asset Transfer Global

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

The screenshot shows the "Asset Lookup" screen. It has several input fields for searching assets: UCOP Tag Number (containing "20033001267" and highlighted with a yellow box), Linked Asset Number, Original Fund Location Code, Current Fund Location Code, Agency, Building Code, Acquisition Type Code, Asset Status Code, Asset Condition, Manufacturer, Asset Number, Custodial Code, Original Fund Number, Current Fund Number, Campus, Building Room Number, UC Acquisition Type Code, UCOP Disposal Code, Vendor Name, and a "Search" button at the bottom (also highlighted with a yellow box).

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*

Search Results							
Actions	Asset Number	UCOP Tag Number	Custodial Code	Building Code	Asset Status Code	UCOP Disposal Code	Asset Description
edit	538538	20033001267	9845	9519	R	22	SERVER, IBM X SERIES 345, XEON PROCESSOR, 6 EA 18.2GB HARD DRIVES

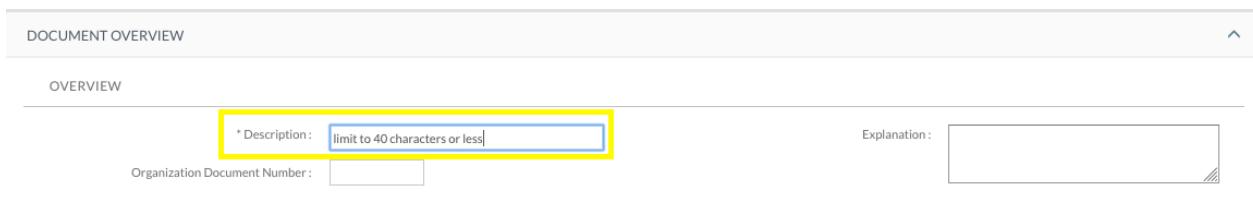
Every document in Kuali requires a 40 character or less “description.”

DOCUMENT OVERVIEW

OVERVIEW

* Description : Explanation :

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 :

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:	538538
* Custodial Code:	9845  
Organization Owner Chart Of Accounts Code:	H
Organization Owner Account Number:	1009845
Organization Owner Organization Code:	HSYS
Linked Asset Number:	<input type="text"/>  
Original Fund Location Code:	3  
Original Fund Number:	63000  
Current Fund Location Code:	3  
Current Fund Number:	63000  
Principal Investigator:	<input type="text"/>  
Agency:	<input type="text"/>  
Acquisition Type Code:	New   
* UC Acquisition Type Code:	31  
* Asset Status Code:	R  
* Asset Condition:	N1  
* Asset Description:	SERVER, IBM X SERIES 345, XEON PROCESSOR, 6 EA 18.2GB HARD DRIVES
* Asset Type Code:	H0765  
Vendor Name:	<input type="text"/>
Manufacturer:	IBM  
Model Number:	X SERIES 345  
Serial Number:	<input type="text"/>
UCOP Tag Number:	20033001267
Old Tag Number:	<input type="text"/>
Federal Property Number:	<input type="text"/>
Receive Date:	03/05/2003  
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]

Campus:	On Campus
Campus:	DV
Building Code:	<input type="text" value="9519"/>  
Building Room Number:	<input type="text"/>  
Building Sub Room Number:	<input type="text"/>

[Needed for off campus addresses only]

Off Campus
Name: <input type="text"/>
Address: <input type="text"/>
City: <input type="text"/>
State: <input type="text"/> 
Postal Code: <input type="text"/> 
Country: <input type="text"/> 

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)

PROPOSED	
Organization Inventory Name:	<input type="text"/>
Asset Representative Principal Name:	wrivers - Rivers, William K
Asset Representative Name:	Rivers, William K
Organization Text:	<input type="text"/>
Organization Tag Number:	<input type="text"/>
Organization Asset Type Identifier:	<input type="text"/>
Replacement Amount:	<input type="text"/>
Estimated Sale Price:	<input type="text"/>

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:	<input type="text"/>
Component In Service Date:	<input type="text"/>
Component Receive Date:	<input type="text"/>
Component Purchase Order Number:	<input type="text"/>
* Component Description:	<input type="text"/>
Component Condition Code:	<input type="text"/>
Component Vendor Name:	<input type="text"/>
Component Manufacturer Name:	<input type="text"/>
Component Model Number:	<input type="text"/>
Component Serial Number:	<input type="text"/>
Component Organization Text:	<input type="text"/>
Component Estimated Lifetime Limit:	<input type="text"/>
Federal Property Number:	<input type="text"/>
Active?:	<input type="checkbox"/>
ADD	

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

NOTES AND ATTACHMENTS (0)	
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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

NOTES AND ATTACHMENTS (0)	
<small>Please DO NOT attach documents with Personal Identification Information (PII) or Protected Health Information (PHI). For more information, please review the following website: https://cloud.ucdavis.edu/data-types-list. Vendor W-9 attachments must be submitted via the inline update form: https://supplychain.ucdavis.edu/procure-contract/w-9-upload</small>	
*Note Text: <input type="text"/>	Attachment: <input type="button" value="Browse..."/> No file selected. <input type="button" value="Remove Attachment"/> ADD

glass to look them up. If you don’t need to ad-hoc route it to anyone, just skip this step:

AD HOC RECIPIENTS	
PERSON REQUESTS	
* PERSON <input type="text"/>	* ACTION REQUESTED <input type="button" value="APPROVE"/>
ACTIONS 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 AggieSurplus, 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.

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

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