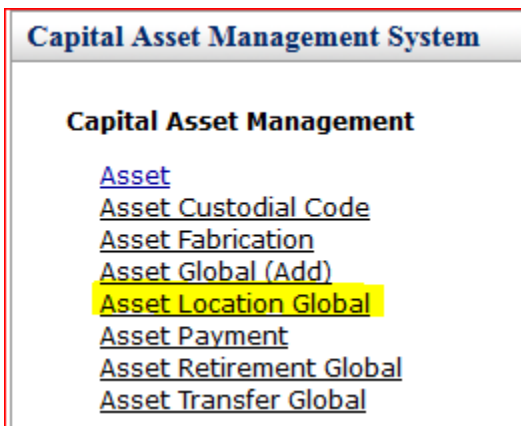


HOW TO DO AN ASSET LOCATION – GLOBAL DOC (aka ALOC doc)

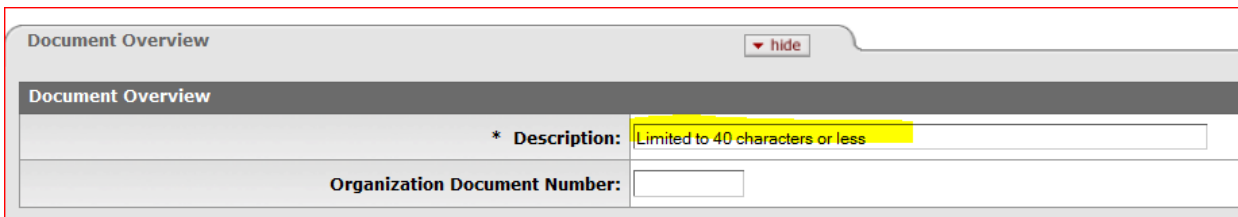
Sign into Kuali (aka KFS)



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

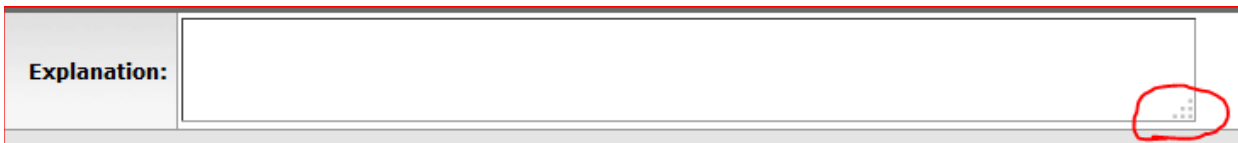


Every document in Kuali requires a 40 character or less “description.”

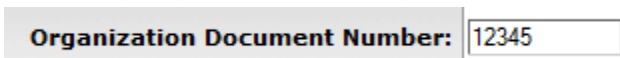


You may put anything you like, but bear in mind this is like the “subject header” of an email – it is what other approvers will see in their KFS inbox and what other KFS users would see if they searched for your document. The description is a searchable field as well, so you are encouraged to spell correctly 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 ?			
UCOP Tag Number:	<input type="text"/>	Asset Number:	<input type="text"/>
Linked Asset Number:	<input type="text"/>	Custodial Code:	<input type="text"/>
Original Fund Location Code:	<input type="text"/>	Original Fund Number:	<input type="text"/>
Current Fund Location Code:	<input type="text"/>	Current Fund Number:	<input type="text"/>
Agency:	<input type="text"/>	Campus:	DV
Building Code:	<input type="text"/>	Building Room Number:	<input type="text"/>



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

Select?	Asset Number	UCOP Tag Number	Custodial Code	Building Code	Asset Status Code

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.

Select?	Asset Number	UCOP Tag Number
<input type="checkbox"/>	<u>515330</u>	953006949
<input type="checkbox"/>	<u>538708</u>	20023008397
<input type="checkbox"/>	<u>546655</u>	20043002755
<input type="checkbox"/>	<u>572936</u>	20143003440
<input type="checkbox"/>	<u>572937</u>	20143003441

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 Number:	572946
Campus:	DV
Building Code:	9992
Building Room Number:	0060
Building Sub Room Number:	
UCOP Tag Number:	20143003450
<input type="button" value="delete"/>	
Asset Number:	572935
Campus:	DV
Building Code:	9992
Building Room Number:	0060
Building Sub Room Number:	
UCOP Tag Number:	20143003439
<input type="button" value="delete"/>	

* Asset Number:	
<input type="button" value="add"/>	
Asset Number:	572946
Campus:	DV
Building Code:	
Building Room Number:	
Building Sub Room Number:	
UCOP Tag Number:	20143003450
<input type="button" value="delete"/>	
Asset Number:	572935
Campus:	DV
Building Code:	
Building Room Number:	
Building Sub Room Number:	
UCOP Tag Number:	20143003439
<input type="button" value="delete"/>	

etc ↓

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:

Asset Number:	515330
Campus:	DV
Building Code:	3745
Building Room Number:	
Building Sub Room Number:	
UCOP Tag Number:	953006949
<input type="button" value="delete"/>	

Room Lookup

With all fields blank except for your new Building Code, click on *Search*.

Campus Code:	DV - UC Davis
Building Code:	3745
Building Room Number:	
Building Room Department:	
Building Room Type:	
Building Address Description:	
Active Indicator:	<input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Both
<input type="button" value="search"/> <input type="button" value="clear"/> <input type="button" value="cancel"/>	

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:

View Asset Depreciation

Notes and Attachments (0)

Notes and Attachments (0)

Notes and Attachments					
	Posted Timestamp	Author	* Note Text	Attached File	Actions
add:				<input type="button" value="Browse..."/> No file selected.	<input type="button" value="add"/>

Ad Hoc Recipients

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

Ad Hoc Recipients		
Person Requests:		
* Action Requested	* Person	Actions
APPROVE		<input type="button" value="add"/>

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