

HOW TO DO AN ASSET RETIREMENT DOCUMENT (aka ARG doc)

Sign into Kual (aka KFS)



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



In the resulting **Asset Retirement Reason Lookup** screen, click on *Search*

Retirement Reason Code:	<input type="text"/>
Retirement Reason Name:	<input type="text"/>
Retirement Reason Restriction Indicator:	<input type="radio"/> Yes <input type="radio"/> No <input checked="" type="radio"/> Both
UCOP Disposal Code:	<input type="text"/>
Active?:	<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"/>	

There are several reasons an asset should be retired, but the only ones the departments should use are:

Retirement Reason Code	Retirement Reason Name	UCOP Disposal Code	UCOP Disposal Name
3	Lost	22	Lost / Unable to Locate
7	Theft	25	Theft
I	Terminating Intercampus Loan	16	Terminate Intercampus Loan
L	Terminating Govt Loan	20	Terminate Loan and Return Equipment to Federal Agency
U	Disposal of Non-inventorial item	10	Retire Non-Inventorial
V	Terminating Non-Govt Loan	17	Terminate External Loan of Non-Government Equipment

Two others should be used *only after* the Aggie Surplus department has given their approval:

Retirement Reason Code	Retirement Reason Name	UCOP Disposal Code	UCOP Disposal Name
4	Discarded -Bargain Barn and ANR Use Only	23	Salvaged - Discarded / Cannibalized for Parts
5	Cannibalized -BargainBarn & ANR Use Only	23	Salvaged - Discarded / Cannibalized for Parts

The most common reason for a department to retire an asset is because, after a good faith effort, it cannot be found and is deemed lost. Using that as our example, you can type in '3' in the **Retirement Reason Code** without having to search first,

Retirement Reason Code:	<input type="text" value="3"/>
Retirement Reason Name:	<input type="text"/>
Retirement Reason Restriction Indicator:	<input type="radio"/> Yes <input type="radio"/> No <input checked="" type="radio"/> Both
UCOP Disposal Code:	<input type="text"/>
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"/>	

Or, if you have searched, click on *Return Value* across from 3

One item retrieved.

Return Value	Retirement Reason Code	Retirement Reason Name	Retirement Reason Restriction Indicator	UCOP Disposal Code	UCOP Disposal Name	Active Indicator
return value	3	<u>Lost</u>	No	22	Lost / Unable to Locate	Yes

Export options: [CSV](#) | [spreadsheet](#) | [XML](#)

The other choices you might have occasion to use are 7 (theft) or U (Disposal of Non-inventorial Item) or the retirement of a borrowed asset after it has been returned to the lender (I, L, V). U are for those items under 5K that you no longer wish to track in CAMS; once 'retired from CAMS' they still need to be disposed of according to policy, but there will no longer be an AT document to do when it is time to salvage the item. All retirement docs route to EQ regardless of the reason.

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

Document Overview ▼ hide	
Document Overview	
* Description:	<input type="text" value="Limited to 40 characters or less"/>
Organization Document Number:	<input type="text"/>

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. A good 40 character description might be "Retire [UCOP Tag #] as Lost."

For an asset that is being retired as lost, it is a very good idea to leave a doc note (either in the Explanation field or the Notes further down) regarding the circumstances, any known facts, and/or how you came by the information. The **Explanation** field is not mandatory for KFS, but it is in order for EQ to approve for anything over \$5,000.

Document Overview * required field

Document Overview

* Description:	RETIRE 863000684 AS LOST	Explanation: This asset has not been seen in many years and was believed to have been salvaged. Since no documentation exists, it is being retired as lost.
Organization Document Number:	<input type="text"/>	

Retirement Information hide

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:

The next thing you need to do is add the *asset* number that you are retiring (**to retire more than one asset at a time, skip to the [Retiring Multiple Assets](#) section further below**). Since *asset* numbers are not how UCD tracks the equipment (we use the UCOP Tag number which used to be referred to as the asset number), you search for the asset number by clicking on the magnifying glass and dropping in the UCOP tag number where indicated and then clicking on *search*:

Asset Detail Information hide

New Asset Retired Look Up/Add Multiple Asset Lines

* Asset Number:

UC Acquisition Type Code:

Asset Lookup Backdoor Id rhe

UCOP Tag Number:

Linked Asset Number:

Next, click on *Return Value*. Note that the asset number is right next to the UCOP Tag number:

Return Value	Asset Number	UCOP Tag Number	Custodial Code	Building Code	Asset Status Code	UCOP Disposal Code	Asset Description	Asset Type Code	In-Service Date
return value	503645	863000684	9845	9519	A		CONTROLLER, 32 TERMINALS,REMOTE FOR SYSTEM 3270	H0766	05/15/1986

Now click on *Add*.

Asset Detail Information ▼ hide

New Asset Retired

* Asset Number: 🔍 📖

UC Acquisition Type Code:

SIDENOTE: If you had known the asset number from the start, you could have simply typed it in and then clicked *Add*.

Once *Add* has been clicked, the asset’s information shows up immediately below. This gives you a chance to make sure you have not inadvertently picked up the wrong asset number:

▼ hide Asset Retired (503645)

Asset Number:	503645
Organization Owner Chart Of Accounts Code:	H
Organization Owner Account Number:	1009845
Organization Owner Organization Code:	1011
Acquisition Type Code:	
UC Acquisition Type Code:	31
Asset Status Code:	A
Asset Condition:	O1
Asset Description:	CONTROLLER, 32 TERMINALS,REMOTE FOR SYSTEM 3270
Asset Type Code:	H0766
Vendor Name:	
Model Number:	3274-41C
Serial Number:	K7644
UCOP Tag Number:	863000684
Federal Property Number:	
Create Date:	05/01/1986
In-Service Date:	05/15/1986
Depreciation Date:	06/01/1986
Total Cost:	11,422.00
Accumulated Depreciation:	11,422.00
Book Value:	0.00
Federal Contribution:	0.00
Organization Text:	
Custodial Code:	9845

Retiring Multiple Assets

If you need to retire two or more assets, click on the magnifying glass next to “**Look Up/Add Multiple Asset Lines**” on the right-hand side of the screen across from the “**Asset Detail Information**” tab.

Asset Detail Information ▼ hide

New Asset Retired Look Up/Add Multiple Asset Lines 🔍

* Asset Number: 🔍 📖

UC Acquisition Type Code:

This will bring up the **Asset Lookup** screen. If you know your UCOP numbers, you can enter up to eight at a time in the **UCOP Tag Number** field by separating them with a pipe character (“|”).

Example: 20103001231|20163001238. This will bring back just these two assets.

Viewing rows 1 to 2

Select?	Asset Number	UCOP Tag Number	Custodial Code	Building Code	Asse
<input type="checkbox"/>	<u>566917</u>	20103001238	<u>9739</u>	<u>9416</u>	<u>A</u>
<input type="checkbox"/>	<u>566910</u>	20103001231	<u>9739</u>	<u>9416</u>	<u>A</u>

The numbers do not need to be consecutive; however, if they are, you can bring back as many as you need by separating the first and last number with two decimal points (“..”).

Example: 20103001231..20103001238. This will bring back all the assets in between as well as the first and last numbers listed:

Viewing rows 1 to 8

Select?	Asset Number	UCOP Tag Number
<input type="checkbox"/>	<u>566910</u>	20103001231
<input type="checkbox"/>	<u>566911</u>	20103001232
<input type="checkbox"/>	<u>566912</u>	20103001233
<input type="checkbox"/>	<u>566913</u>	20103001234
<input type="checkbox"/>	<u>566914</u>	20103001235
<input type="checkbox"/>	<u>566915</u>	20103001236
<input type="checkbox"/>	<u>566916</u>	20103001237
<input type="checkbox"/>	<u>566917</u>	20103001238

If your numbers don't lend themselves easily to either of the two scenarios above, narrow the search for assets by entering your User ID name under “Asset Representative Principal Name” and if necessary, the custodial codes in question (separate them by the pipe character if you have more than one custodial code).

Asset Representative Principal Name: <input type="text" value=""/>	Custodial Code: <input type="text" value=""/>
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SIDENOTE: It is not recommended that you retire as lost assets with different title. This way, if there is a question on a non UC titled asset, your document will not need to be disapproved just for that asset, or for one or two assets. EQ does not have the ability to amend documents (i.e., add or remove asset numbers).

When you are ready, click “Search.” Your results will be at the bottom of the screen.

Using the “**Select?**” column, check off all those assets you wish to retire.

Select?	Asset Nun
<input type="checkbox"/>	<u>566917</u>
<input type="checkbox"/>	<u>566910</u>

You can cherry pick if you have more assets returned than you want to retire, or if all of the ones you see need to be retired, click on “**select all from all pages.**”

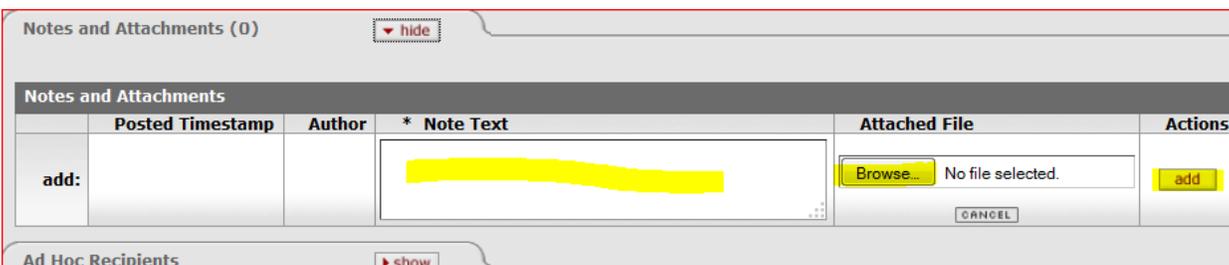
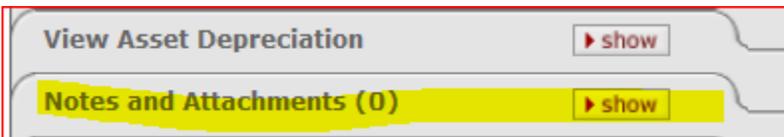
Once your assets are selected, click on “return selected.”



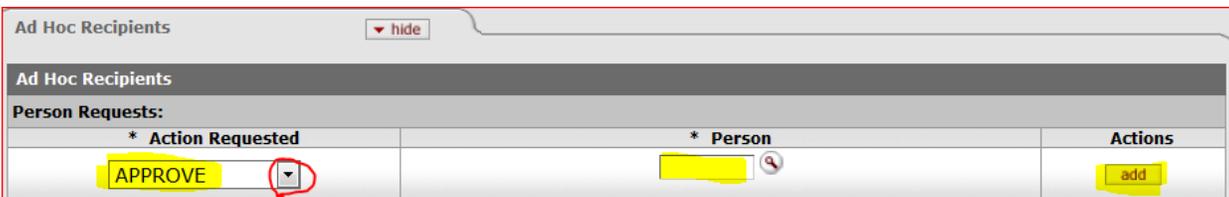
Because you used the **Look Up/Add Multiple Asset Lines** method, you do not need to “add” although now would be a good time to make sure the assets you want to retire are listed.

FINISHING YOUR RETIREMENT DOC

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!

