

## HOW TO DO AN ASSET TRANSFER GLOBAL DOC (aka ATG doc)

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Sign into Kuali (aka KFS)

The screenshot shows the Kuali Financials homepage. At the top is a navigation bar with icons for back, forward, search, and home. Below it is the UC Davis logo and the word "Financials". The main content area has a sidebar on the left with links like Home, Action List, Doc Search, Jump to..., Accounting, Accounts Payable, Accounts Receivable, Capital Assets (which is highlighted), Chart of Accounts, Contracts & Grants, Contracts & Grants Billing, Custom Document Search, Purchasing, and Reporting/External Systems. The main panel displays a grid of "Capital Assets" categories under four columns: Activities, Administration, Reference, and Pre-Asset Tagging. The "Reference" column includes "Asset Transfer Global", which is also highlighted with a yellow box. At the bottom of the page is a "DOCUMENT OVERVIEW" section with fields for "OVERVIEW", "Explanation", and "Organization Document Number", each with a grey triangle indicating it can be expanded.

In the reference column, under **Capital Asset Management System**, click on *Asset Transfer Global*

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

This screenshot shows the "Asset Transfer Global" document overview. It features a "Description" field containing "limit to 40 characters or less" and an "Explanation" field with a grey triangle indicating it's expandable. The "Organization Document Number" field contains "12345". A yellow box highlights the "Description" field.

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 example, “Transfer 20143001234 and 20143001235 to the BB.”

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.

Organization Document Number :

Before you can submit an ATG doc, you'll need to know the custodial code of where it is going. Once you know this information:

Type in the current custodial code (which should be 'your' custodial code):

\* Current Custodial Code:

Type in the destination custodial code. If you needed to look it up, you can use the magnifying glass.

\* New Custodial Code:

If you need to transfer just one asset, skip the steps immediately below and go to the section "[Transferring One Asset](#)."

## TRANSFERRING MORE THAN ONE ASSET

If you need to transfer two or more assets ***from the same code to another single code***, click on the magnifying glass next to "**Look Up/Add Multiple Asset Lines**" on the right-hand side of the screen across from the "**Edit List of Assets**" tab.

[Look Up/Add Multiple Asset Lines](#)

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.

The numbers do not need to be consecutive; however, if they are, you can bring back as many as you need by separating

Select?	Asset Number	UCOP Tag Number	Custodial Code	Building Code	Asset Status Code	UCOP Disposal Code	Asset Description	Asset Type Code	Receive Date
<input type="checkbox"/>	500706	733012585	9816	9416	D		DEFIBRILLATOR ANALYZER	F8730	06/01/1973
<input type="checkbox"/>	500708	733014526	9811	9416	A		OVEN	G8621	06/01/1973
<input type="checkbox"/>	503013	833004161	9817	9416	D		KEY CABINET, 1680 KEYS VERTICAL, CHANCELLOR SERIES,	J9810	12/01/1983

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 9
<a href="#">Select All From All Pages</a> <a href="#">Deselect All From All Pages</a>
<a href="#">Select All From This Page</a> <a href="#">Deselect All From This Page</a> <a href="#">Return Selected</a>

  

Select?	Asset Number	UCOP Tag Number
<input type="checkbox"/>	531166	20003006790
<input type="checkbox"/>	531167	20003006791
<input type="checkbox"/>	531168	20003006792
<input type="checkbox"/>	531169	20003006794
<input type="checkbox"/>	531170	20003006795
<input type="checkbox"/>	531171	20003006796
<input type="checkbox"/>	531172	20003006797
<input type="checkbox"/>	531173	20003006798
<input type="checkbox"/>	531174	20003006799

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 code in question. Please note: you cannot move assets from several custodial codes; it must be a "one code to one code" transfer.

Asset Representative Principal Name:  Custodial Code:   

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 transfer.

Viewing rows 1 to 9		
Select All From All Pages	Deselect All From All Pages	
<input checked="" type="checkbox"/>	Asset Number	UCOP Tag Number
<input type="checkbox"/>	<a href="#">531166</a>	20003006790
<input type="checkbox"/>	<a href="#">531167</a>	20003006791
<input type="checkbox"/>	<a href="#">531168</a>	20003006792

You can cherry pick if you have more assets returned than you want to transfer, or if all of the ones you see need to be transferred, 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 transfer are listed. If everything is as it should be, skip to the section "[Finishing Your Transfer](#)" lower down in this doc.

## TRANSFERRING ONE ASSET

If you know the asset number you are transferring, type it in and then click Add. Otherwise, since KFS 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 Number:   

**ADD**

Using 863000684 as an example:

Asset Lookup 

UCOP Tag Number:	<input type="text" value="863000684"/>
Linked Asset Number:	<input type="text"/>

**Search** **Clear** **Cancel**

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	Receive Date
return value	503636	863000684	9845	9519	R	22	CONTROLLER, 32 TERMINALS, REMOTE FOR SYSTEM 3270	H0766	05/01/1986

Now click on Add.

\* Asset Number:   

**ADD**

## FINISHING YOUR TRANSFER

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

EDIT LIST OF ASSETS

NOTES AND ATTACHMENTS (0)

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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>

\* Note Text:

Attachment:  No file selected.

**ADD**

**Remove Attachment**

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:

The screenshot shows a user interface for managing ad-hoc recipients. At the top, there is a header labeled "AD HOC RECIPIENTS". Below it, a section titled "PERSON REQUESTS" contains several input fields and buttons. On the left, there is a field labeled "\* PERSON" with a magnifying glass icon, which is highlighted with a yellow box. To its right is a dropdown menu labeled "\* ACTION REQUESTED" with the option "APPROVE" selected, also highlighted with a yellow box. Further to the right is a green "ADD" button. At the bottom of this section are three buttons: "Submit" (highlighted with a yellow box), "Save", and "Cancel".

Click *Submit*. You're all done!