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

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

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

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 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:

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.

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:
**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]*
### [Needed for off campus addresses only]

- **Off Campus**
  - Name: 
  - Address: 
  - City: 
  - State: 
  - Postal Code: 
  - Country: 

### 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)

<table>
<thead>
<tr>
<th>PROPOSED</th>
</tr>
</thead>
<tbody>
<tr>
<td>Organization Inventory Name:</td>
</tr>
<tr>
<td>Asset Representative Principal Name:</td>
</tr>
<tr>
<td>Asset Representative Name:</td>
</tr>
<tr>
<td>Organization Text:</td>
</tr>
<tr>
<td>Organization Tag Number:</td>
</tr>
<tr>
<td>Organization Asset Type Identifier:</td>
</tr>
<tr>
<td>Replacement Amount:</td>
</tr>
<tr>
<td>Estimated Sale Price:</td>
</tr>
</tbody>
</table>

### Components Tab:
All of these boxes look editable, but only some should be changed by the department. They are highlighted in yellow.
If you have notes or attachments you wish to add, ‘show’ the Notes and Attachments Tab and add them:

**NOTES AND ATTACHMENTS (0)**

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:

**SIDENOTE**: The tabs that you have edited will have a gold asterisk next to them:
Click on Submit. You're all done!

**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.