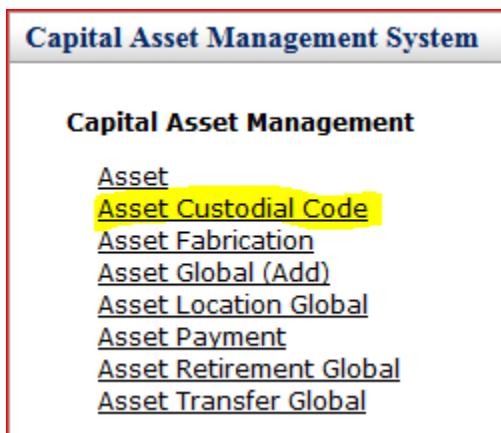


## HOW TO MAKE CHANGES TO YOUR CUSTODIAL CODE

From the KFS Main Menu, click on *Asset Custodial Code*:



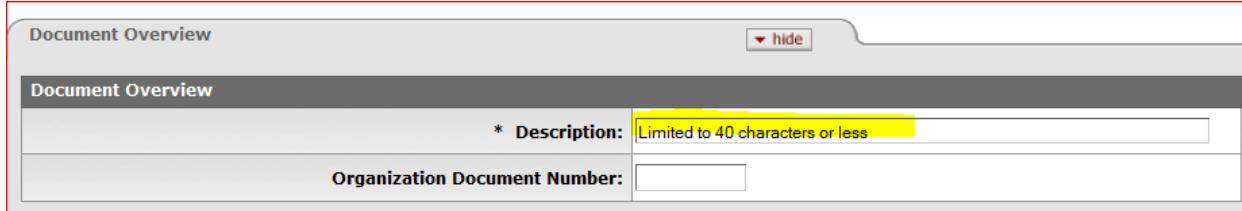
Type in the custodial code you wish to makes changes to and then click *search*:

<b>Custodial Code:</b>	<input type="text"/>
<b>Custodial Description:</b>	
<b>Asset Representative:</b>	<input type="text"/>
<b>Asset Delegate:</b>	<input type="text"/>
<b>Organization Owner Chart Of Accounts:</b>	<input type="text"/>
<b>Organization Owner Account Number:</b>	<input type="text"/>
<b>Organization Owner Organization Code:</b>	<input type="text"/>
<b>Department Head:</b>	<input type="text"/>
<b>Department Delegate:</b>	<input type="text"/>
<b>UC Sub Location Code:</b>	<input type="text"/>
<b>Active Indicator:</b>	<input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Both
<b>search</b> <b>clear</b> <b>cancel</b>	

Click on *edit*.

Actions	<u>Custodial Code</u>
<a href="#"><u>edit</u></a>	

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



The screenshot shows the 'Document Overview' screen. At the top, there is a 'Document Overview' section with a 'Description' field. The 'Description' field is highlighted with a yellow box, and the text 'Limited to 40 characters or less' is displayed to its right. Below the 'Description' field is an 'Organization Document Number' field, which is also highlighted with a yellow box. A 'hide' button is located in the top right corner of the 'Document Overview' section.

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. Some examples for documents in general are:

Update Asset Rep for Custodial Code 1234  
Update Owner's Acct for Cust Code 1234

The current information will be on the left hand side of the document; your changes will be done on the right hand side.

The information you are allowed to amend will be in a white box; anything not in a white box is not amendable by the department.

Changes that the department is allowed to make are:

- Custodial Description (name of the custodial code)
- Asset Rep
- Department Head
- Department Head Delegate
- Organization Owner Chart of Accounts
- Organization Owner Account Number
- UC Sub Location Code
- Asset Delegate (including Effective Start and End dates)

New

Custodial Code:	[REDACTED]
* Custodial Description:	[REDACTED]
* Asset Representative:	[REDACTED] 
Department Head:	[REDACTED] 
Department Delegate:	[REDACTED] 
* Organization Owner Chart Of Accounts:	[REDACTED]  
* Organization Owner Account Number:	[REDACTED]  
Inventory Cycle Type Code:	[REDACTED]
Program Code:	[REDACTED]
* UC Sub Location Code:	[REDACTED] 
Active Indicator:	Yes

* Asset Delegate:	[REDACTED] 
* Effective Start Date:	[REDACTED] 
Effective End Date:	[REDACTED] 
<b>add</b>	

Please Note: adding an Asset Delegate also requires you to click on *Add* (seen above).

Changes EQ would need to make for you:

- Custodial Code number
- Inventory Cycle Code
- Program Code
- Active Indicator

Please note: if your custodial code has a blank after “Program Code” you will need to contact EQ to have that filled in before being able to proceed with any changes to your custodial code.

If you have any notes or attachments, add them in the tab indicated:

Notes and Attachments (0)
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\* Note Text

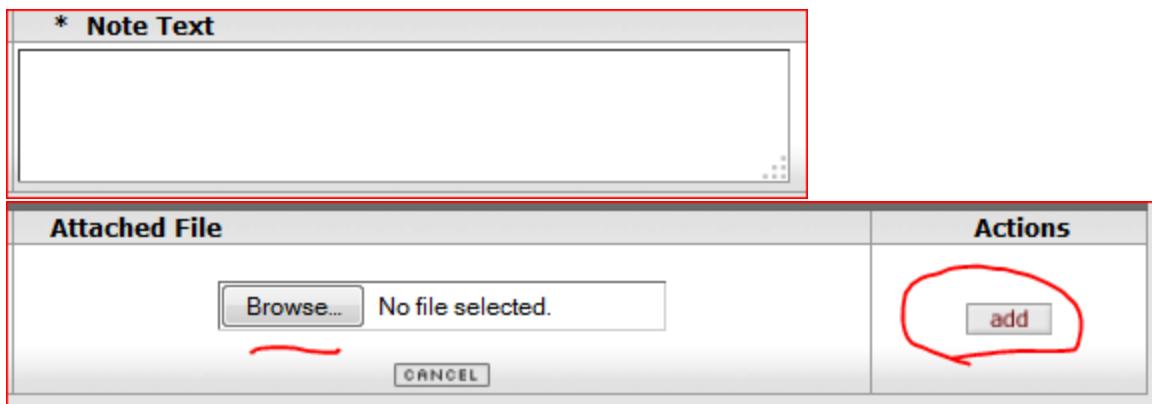
Attached File

Actions

Browse... No file selected.

CANCEL

add

A screenshot of a web-based file upload interface. At the top, there is a text area labeled "Note Text". Below it is a section for "Attached File" with a "Browse..." button and a message "No file selected.". At the bottom right is an "Actions" section with a "cancel" button and a "add" button, which is circled in red.

Once you have made the desired changes to your code, click on *Submit*

submit save close cancel

A screenshot of a button bar with four buttons: "submit", "save", "close", and "cancel". The "submit" button is highlighted with a yellow background and circled in red.