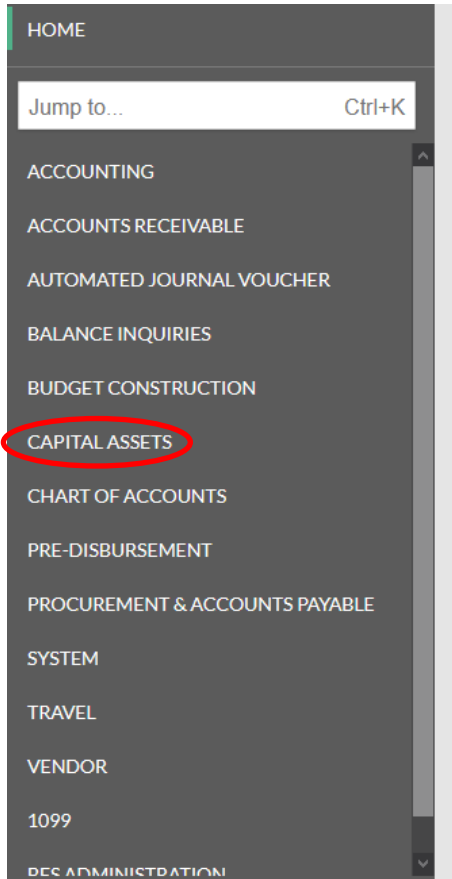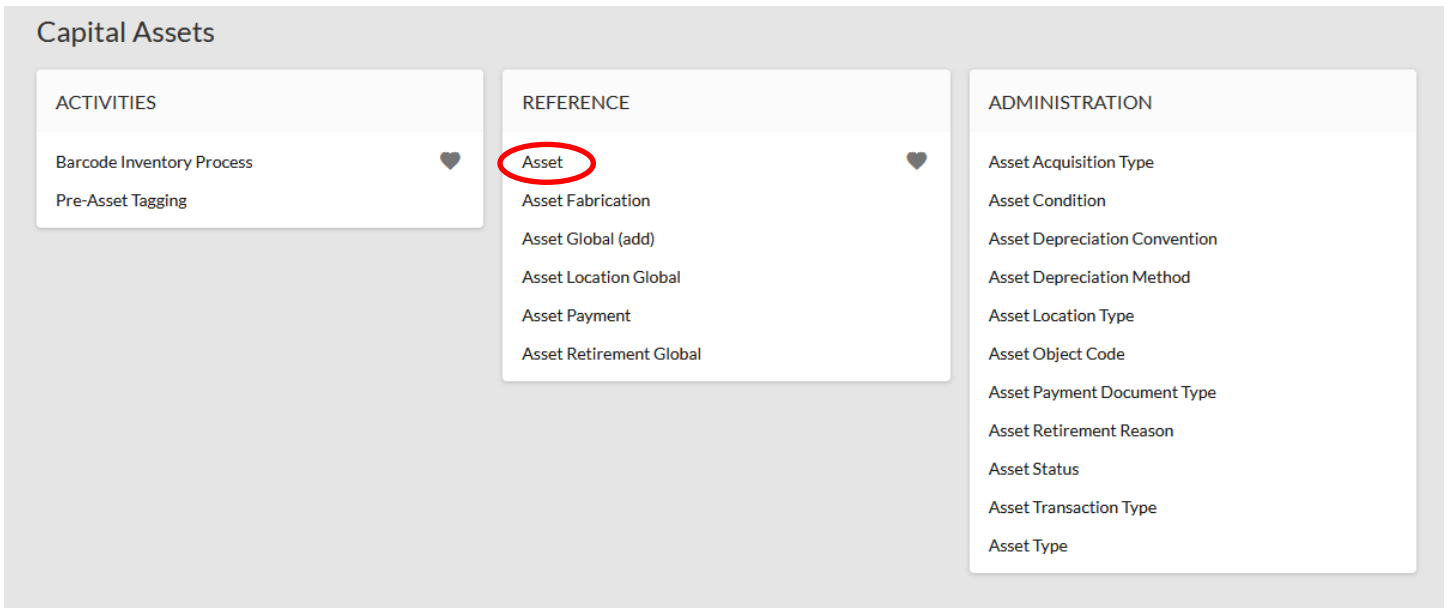Creating a Department Change Document in Kuali

PURPOSE: To change the custody of an asset from one department to another.

From the Main Menu screen, click on **Capital Assets.**

In the **Reference** box, click on the **Asset** link.

The Asset Lookup screen will open. Search for an asset by entering known asset information, such as the **Tag Number** (CSU decal number). After entering known information, click on the **Search** button.

When the search results are retrieved, confirm it is the correct asset and click on **Edit** in the actions box.

An Asset Edit Document will open.

Enter a **Description** in the **Document Overview** tab. *Example:* Transfer asset to chemistry.

Use the **Explanation** field (also located in the **Document Overview** tab) to provide any specific notes regarding the transfer. *Example:* PI transferred to a new department.

In the **Asset Detail Information** tab, the current asset information is on the left and a place to enter the **Proposed** (new) information is on the right.

Change or update the asset condition if needed.

Enter or look-up (by clicking the magnifying glass icon) the Proposed (new) **Organization Owner Account Number** default number. *Note:* The Default number is used to assign and identify the responsible department for capital assets only, no financial transactions will post.

If using the magnifying glass icon, clicking on it will open the Account Lookup screen.

Delete the current account number shown in the **Account Number** field and search for the new Account Number by entering the department number you want to transfer the asset to in the **Organization Code** field and clicking on **search**. All account numbers available for the entered Organization Code will be retrieved.

Click on the underlined **department** number in the **Organization Code** column of the search results. The following organization inquiry will open in a separate window.

Locate the **Organization Default Account Number** for the selected department. Write it down or remember it. Close out the inquiry window to return to your search results. Locate the default account in the results and click on **return value** at the left of the search results. You will return to the document with the **Organization Owner Account Number** and the **Organization Owner Organization Code** (department number) both populated.

In the **Asset Location** tab, if the asset will be physically moved to a new location, enter the proposed **Building Code** and/or **Building Room Number** fields. Search for these codes by clicking on the magnifying glass icon and searching by building name. *Note:* If the asset is in the same location shown, skip to the next tab.

In the **Organization Information** tab, update the proposed (new) **Asset Representative Principal Name.** Click on the magnifying glass icon to the right of the field to search for the new asset representative's name. *Note*: When the Person Lookup screen appears, delete the current name in the **Principal Name** field. Enter the new name in the **Last Name** field and click on search. Once results are retrieved, select the correct person, then click on **return value**. You will return to the document. *Note:* The **Asset Representative Name** field will auto-fill with the same name as the **Asset Representative Principal Name**.

Provide any notes and attachments in the **Notes and Attachments** tab. You must click on the **Add** button or you will lose the attachment.

In the **Ad Hoc Recipients** tab, ad hoc anyone that is required or necessary (and not already shown in the route log) by clicking on the magnifying glass icon to the right of the **Person** field. Search for required approvers by clicking on the magnifying glass icon to the right of the **Person** field. Select **return value** for the appropriate person(s). Select the **Action Requested** using the drop down. *Note*: You must click the **Add** button or the ad hoc will not be added.

Click on submit when you are finished. You should see the message **Document was successfully submitted** at the top of the document. If you see an error message instead (in red lettering), read the explanation of the problem – correct the error and resubmit.