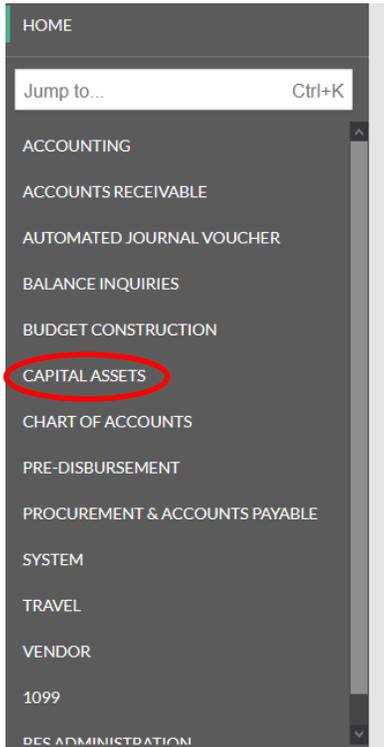


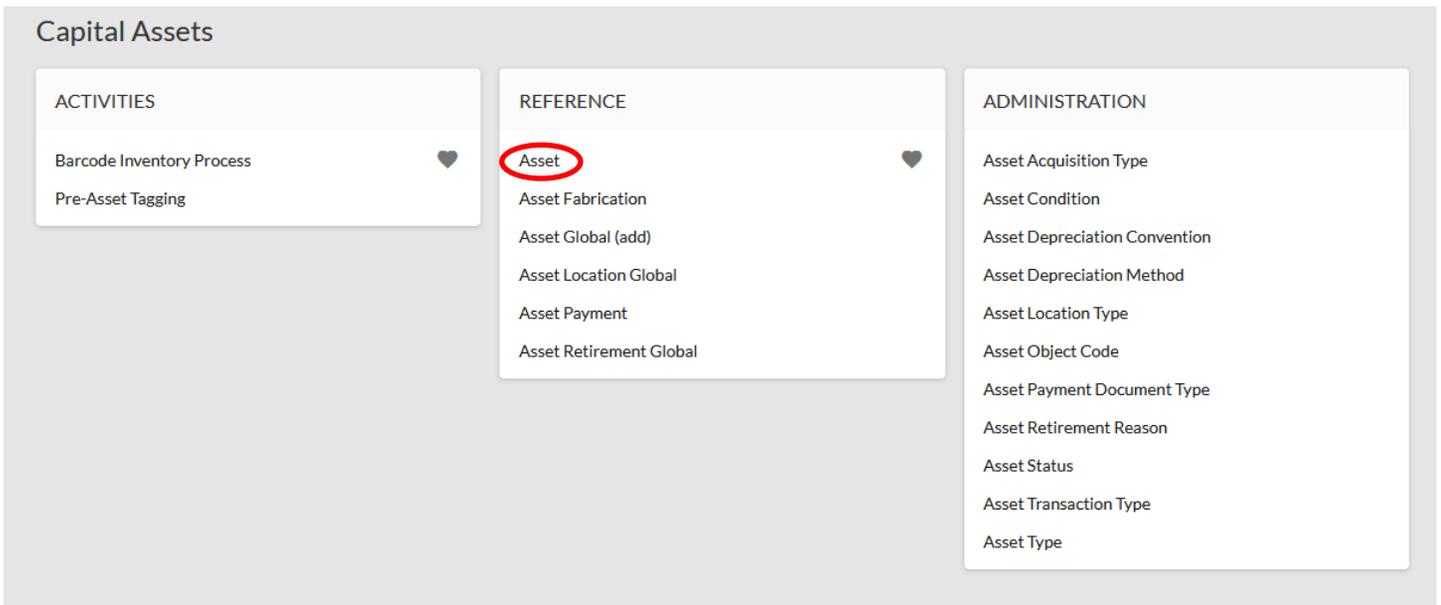
Creating a Responsible Person Change Document in Quali

PURPOSE: To transfer the responsibility of an asset from one person 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.

Tag Number:

Asset Number:

Organization Owner Chart Of Accounts Code: 

Organization Owner Organization Code: 

Organization Owner Account Number: 

Owner: 

Campus: 

Building Code: 

Building Room Number: 

Asset Type Code: 

Asset Status Code: 

Asset Condition:

Vendor Name:

Manufacturer:

Model Number:

Serial Number:

Create Date From: 

Create Date To: 

Asset Representative Principal Name:

Organization Inventory Name:

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

Search Results

Actions	Asset Number	Tag Number	Organization Owner Organization Code	Building Code	Asset Sta
edit loan renew return merge separate	504885	325325	1018	0041	A

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

An Asset Edit Document will open.

DOCUMENT OVERVIEW

OVERVIEW

* Description:

Organization Document Number:

Explanation:

ASSET DETAIL INFORMATION

PREVIOUS	PROPOSED
Asset Detail Info	Asset Detail Info
Asset Number: 504885	Asset Number: 504885
Organization Owner Chart Of Accounts Code: CO	* Organization Owner Chart Of Accounts Code: CO 
Organization Owner Account Number: 1352520	* Organization Owner Account Number: 1352520 
Organization Owner Organization Code: 1018	Organization Owner Organization Code: 1018
Owner: CSU	Owner: CSU
Acquisition Type Code: Pre-Asset Tagging	Acquisition Type Code: Pre-Asset Tagging
Asset Status Code: A	* Asset Status Code: A 
Asset Condition: Good-Operational	* Asset Condition: Good-Operational 
Asset Description: BLADE SERVER	* Asset Description: BLADE SERVER

Enter a **Description** in the **Document Overview** tab. *Example: Updating Responsible Party*

Use the explanation field (also located in the **Document Overview** tab) to enter any specific notes regarding why a change of responsible party is being submitted. *Example:* PI retired.

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.

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.

The screenshot shows the 'ASSET LOCATION' tab with two columns: 'PREVIOUS' and 'PROPOSED'. The 'PREVIOUS' column has fields for 'On Campus' (Campus: MC, Building Code: 1101, Building Room Number: 1101, Building Sub Room Number) and 'Off Campus' (Name, Address, City, State, Postal Code, Country). The 'PROPOSED' column has similar fields. Red circles highlight the magnifying glass icons next to the 'Building Code' and 'Building Room Number' fields in the 'PROPOSED' column, indicating a search function.

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**.

The screenshot shows the 'ORGANIZATION INFORMATION' tab with 'PREVIOUS' and 'PROPOSED' columns. The 'PREVIOUS' column shows 'Organization Inventory Name: MAHMOUD, HUSSAM N', 'Asset Representative Principal Name: hmahmoud@colostate.edu - Mahmoud, Hussam N', and 'Asset Representative Name: Mahmoud, Hussam N'. The 'PROPOSED' column has the same fields. Red circles highlight the magnifying glass icons next to the 'Asset Representative Principal Name' and 'Asset Representative Name' fields in the 'PROPOSED' column.

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

The screenshot shows the 'NOTES AND ATTACHMENTS (0)' tab. It has a 'Note Text' field, an 'Attachment' section with a 'Browse...' button and a 'Remove Attachment' button, and a green 'ADD' button circled in red.

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.

The screenshot shows a row of four buttons: 'Submit', 'Save', 'Close', and 'Cancel'. The 'Submit' button is circled in red.