

Creating a Responsible Person Change Document in Kualii

First you need to find the asset you wish to change the responsibility for. On the Main Menu screen under the **Lookup and Maintenance** box in the middle of the screen look under the **Capital Asset Management** heading and click on **Asset**.

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1099 Process

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Search by entering the CSU decal number into the **Tag Number** field.

http://kfsprod.is.colostate.edu:8480/?channelTitle=Asset&channelUrl=kr/lookup.do?methodToCall=s - Windows Internet Explorer

* required field

Tag Number: <input type="text" value="319568"/>	Asset Number: <input type="text"/>
Organization Owner Chart Of Accounts Code: <input type="text"/>	Organization Owner Organization Code: <input type="text"/>
Organization Owner Account Number: <input type="text"/>	Owner: <input type="text"/>
Campus: <input type="text"/>	Building Code: <input type="text"/>
Building Room Number: <input type="text"/>	Asset Type Code: <input type="text"/>
Asset Status Code: <input type="text"/>	Asset Condition: <input type="text"/>
Vendor Name: <input type="text"/>	Manufacturer: <input type="text"/>
Model Number: <input type="text"/>	Serial Number: <input type="text"/>
Create Date From: <input type="text"/>	Create Date To: <input type="text"/>
Asset Representative Principal Name: <input type="text"/>	Organization Inventory Name: <input type="text"/>
Asset Description: <input type="text"/>	Organization Text: <input type="text"/>
National Stock Number: <input type="text"/>	Government Tag: <input type="text"/>
Old Tag Number: <input type="text"/>	Organization Tag Number: <input type="text"/>
Total Cost: <input type="text"/>	Payment Sequence Number: <input type="text"/>
Payment Purchase Order Number: <input type="text"/>	Payment Document Number: <input type="text"/>

search clear cancel

One item retrieved.

Actions	Asset Number	Tag Number	Organization Owner Organization Code	Building Code	Asset Status Code	Asset Description	Asset Type Code	In-Service Date
edit loan renew return merge separate transfer	1837	319568	8032	0006	A	5 PAN PORTABLE STEAM TABLE	00025ME	06/30/2005

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

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Once you find your asset, click on **Edit** in the actions to the left. You will see the following screen.

http://kfsprod.is.colostate.edu:8480/?channelTitle=Asset&channelUrl=kr/lookup.do?methodToCall=s - Windows Internet Explorer

kuali
financial systems

Prod09022010 (Oracle9i)

Main Menu Maintenance Administration

action list doc search

Logged in User: kahrsj

Asset ?

Doc Nbr: 961261 Status: INITIATED
Initiator: kahrsj Created: 02:41 PM 09/14/2010

expand all collapse all
* required field

Document Overview

Document Overview

* Description:
Org. Doc. #:

Explanation:

Asset Detail Information

Old		New	
Asset Detail Info		Asset Detail Info	
Asset Number:	1730	Asset Number:	1730
Organization Owner Chart Of Accounts Code:	CO	Organization Owner Chart Of Accounts Code:	CO
Organization Owner Account Number:	1315050	* Organization Owner Account Number:	<input type="text" value="1315050"/>
Organization Owner Organization Code:	1373	Organization Owner Organization Code:	1373
Owner:	CSU	Owner:	CSU
Acquisition Type Code:	N - New	Acquisition Type Code:	N - New
Asset Status Code:	A	* Asset Status Code:	<input type="text" value="A"/>
Asset Condition:	G - Good	* Asset Condition:	<input type="text" value="G - Good"/>
Asset Description:	DOPPLE RADAR PROFILER SYSTEM	* Asset Description:	<input type="text" value="DOPPLE RADAR PROFILER SYSTEM"/>
Asset Type Code:	75170S1	* Asset Type Code:	<input type="text" value="75170S1"/>
Vendor Name:	LEIPZIG	Vendor Name:	LEIPZIG
Manufacturer:	LEIPZIG	Manufacturer:	<input type="text" value="LEIPZIG"/>
Model Number:	24 GHZ FM-CW	Model Number:	<input type="text" value="24 GHZ FM-CW"/>
Serial Number:	R2137S5	Serial Number:	<input type="text" value="R2137S5"/>
Tag Number:	319687	Tag Number:	<input type="text" value="319687"/>
Old Tag Number:		Old Tag Number:	<input type="text"/>
Government Tag:		Government Tag:	
National Stock Number:		National Stock Number:	
Last Inventory Date:		Last Inventory Date:	
Create Date:	05/20/2005	Create Date:	05/20/2005

Done Trusted sites | Protected Mode: Off 100%

As with all other documents in Kuali, you will need to enter a **Description** in the **Document Overview** tab.

Example: Updating Responsible Party

You can use the explanation field (also located in the **Document Overview** tab) to put in any specific notes about why you are changing the responsible party.

If the asset is changing locations then update the physical location where the asset is moving to on the **Asset Location** tab. If the asset is not changing locations then skip this step. The **Building Code** and **Building Room Number** fields will need to be filled in. You can search for these codes by clicking on the magnifying glass and searching by building name.

http://kfsprod.is.colostate.edu:8480/?channelTitle=Asset&channelUrl=kr/lookup.do?methodToCall=s - Windows Internet Explorer

Federal Contribution: | 0.00

Federal Contribution: | 0.00

Asset Location hide

Old	New
On Campus	On Campus
Campus: MC	* Campus: MC
Building Code: 0041	Building Code: 0041
Building Room Number: C209	Building Room Number: C209
Building Sub Room Number:	Building Sub Room Number:
Off Campus	Off Campus
Name:	Name:
Address:	Address:
City:	City:
State:	State:
Postal Code:	Postal Code:
Country:	Country:

Organization Information show

Payments show

The next step is to update the person responsible for the asset in the **Organization Information** tab. You will need to delete the current name from the **Asset Representative Principal Name** field and click on the magnifying glass to the right of the field to search for your new responsible person's name. Click on **return value** when you have found the new name.

http://kfsprod.is.colostate.edu:8480/?channelTitle=Asset&channelUrl=kr/lookup.do?methodToCall=s - Windows Internet Explorer

Organization Information hide

Old	New
Organization Inventory Name:	Organization Inventory Name:
Asset Representative Principal Name: dategan, - Lategan, Deon	Asset Representative Principal Name: dategan, Lategan, Deon
Asset Representative Name: Lategan, Deon	Asset Representative Name: Lategan, Deon
Organization Text:	Organization Text:
Organization Tag Number:	Organization Tag Number:
Organization Asset Type Identifier:	Organization Asset Type Identifier:
Receive Date:	Receive Date:
Replacement Amount:	Replacement Amount:
Estimated Sale Price:	Estimated Sale Price:

Payments show

If you need to attach any documentation to your document you will do so in the **Notes and Attachments** field. You must remember to click on the **Add** button after you have attached your file or your attachment will be lost!

http://kfsprod.is.colostate.edu:8480/?channelTitle=Asset&channelUrl=kr/lookup.do?methodToCall=s - Windows Internet Explorer

Initiator: kahrsi Created: 09:53 AM 09/16/2010

expand all collapse all
* required field

- Document Overview
- Asset Detail Information
- Asset Location
- Organization Information
- Payments
- Payments Lookup
- Land Information
- Asset Depreciation Information
- Warranty
- Repair History
- Components
- Lookup Related Capital Asset Document(s)
- View Purchasing/Financial Asset Documents
- Notes and Attachments (0)

Notes and Attachments					
	Posted Timestamp	Author	* Note Text	Attached File	Actions
add:			<input type="text"/>	<input type="text"/> <input type="button" value="Browse..."/> <input type="button" value="CANCEL"/>	<input type="button" value="add"/>

- Ad Hoc Recipients
- Route Log

Click on submit when you are finished. You should see the message **Document was successfully submitted** at the top of the document. If not you will instead see in red lettering an explanation of the problem – correct the error and resubmit.