Creating a Surplus Document in Kuali

**PURPOSE:** To transfer an asset to surplus for repurposing or to be retired from CSU’s records. *Note:* The following disposal reasons need the asset record to be transferred to surplus by creating a surplus document in Kuali:
Cannibalization requests, Software Termination requests, Sale requests, Equipment Release requests involving an outside entity (including Vendor Removal offers), Destroyed or Damaged asset transfers due to accidents or covered losses, and any other types of disposal reasons involving equipment no longer utilizable or needed by the department. For the following 4 (four) reasons only, the Department will need to submit an Asset Retirement Global document: Theft, Trade-In, External Transfer, and Write-Off (Lost/Improper Disposal).

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 surplus.

Use the **Explanation** field (also located in the **Document Overview** tab) to enter any specific notes for surplus property that would aid them in picking up your equipment. *Example:* please contact Kelly at 1-2345 to coordinate pickup or asset needs to be picked up before August 1st.

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 the Proposed (new) **Organization Owner Account Number** default number. *Note:* The surplus property default number is **2288400**.

In the **Asset Location** tab, update the **Building Code** and **Building Room Number** fields to reflect the current location of the asset where surplus can find the asset and pick it up. *Note:* If the asset is in the same location shown, skip to the next tab.

Provide any notes and attachments in the **Notes and Attachments** tab (e.g., Refrigerator, Freezer, and Laboratory Equipment Declaration (RFLE) form [required when sending refrigerators and freezers to surplus], authorizations to
dispose of sponsor owned equipment or sponsor funded equipment on active sponsored projects, etc.). You must click on the Add button or you will lose the attachment.

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.