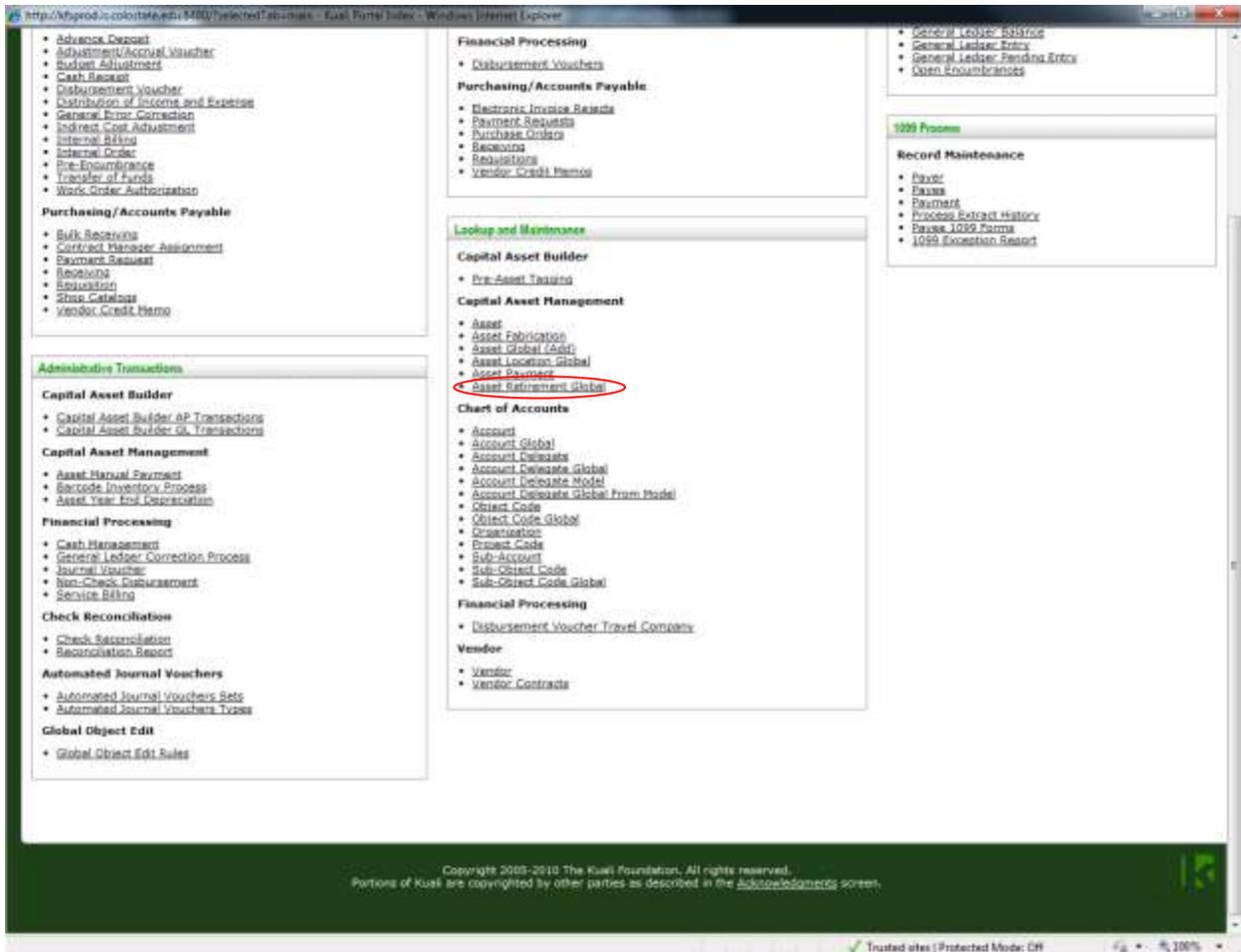
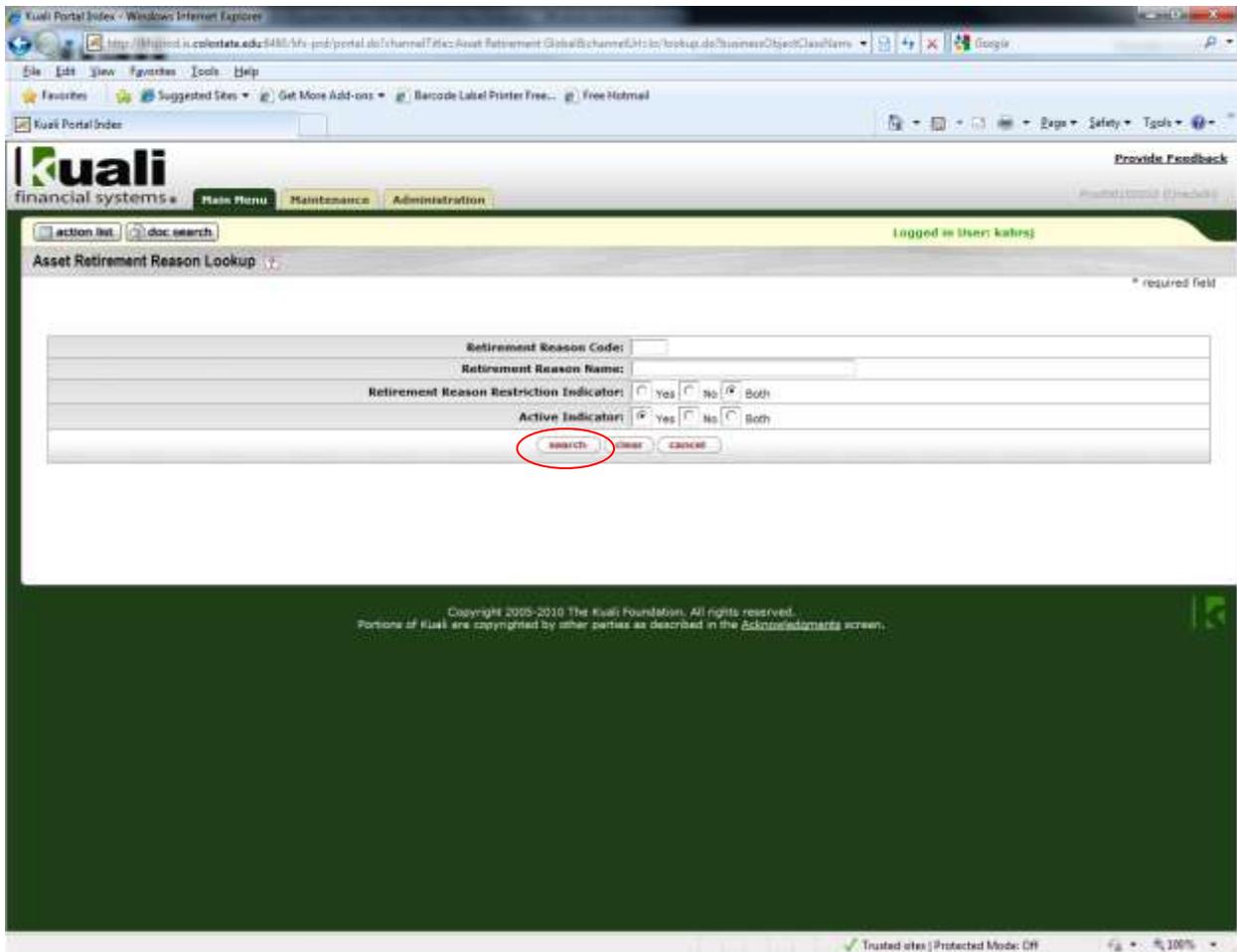


Creating a Lost/Write-Off Retirement Document

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 the **Asset Retirement Global** link.



You will see the following screen. Click **search** without entering any information to get the list of retirement reasons that you can choose from.



Select **return value** for code 3 the **Lost** retirement reason code.



When you select **return value** for the lost retirement reason you will see the following screen.

The screenshot displays the 'Asset Retirement Global' form in the Kuali system. The 'Document Overview' tab is active, showing fields for 'Description', 'Org. Doc. #', and 'Explanation'. The 'Retirement Information' section shows 'Retirement Reason Code' set to 'Lost' and 'Retirement Date'. The 'Asset Detail Information' section includes an 'Asset Number' field with a magnifying glass icon for search. At the bottom, there are buttons for 'submit', 'save', 'close', and 'cancel'. The page also shows a 'Logged in User: kahrsj' and a 'Doc Nbr: 96837'.

- 1.) As with all other documents in Kuali, you will need to enter a **Description** in the **Document Overview** tab. *Example:* Writing-Off Copier
- 2.) You will use the explanation field (also located in the **Document Overview** tab) to give an explanation for why you cannot locate the asset.
Example: Copier may have been surplussed but we can't find any paperwork confirming this.
- 3.) The next tab you will need to fill out is the **Asset Detail Information** tab. You will need to do a search for the asset number by clicking on the magnifying glass to the right of the **Asset Number** field. You will see the following search screen. Type your CSU decal number into the **Tag Number** field and search. When the search results come up and you find the asset that you want you will select **Return Value**.

- 4.) The next tab that you will need to fill out is the **Notes and Attachments** tab. For this document you will need to write a statement about how you will improve your equipment management procedures so that the circumstance for which you are writing off this asset is not repeated.

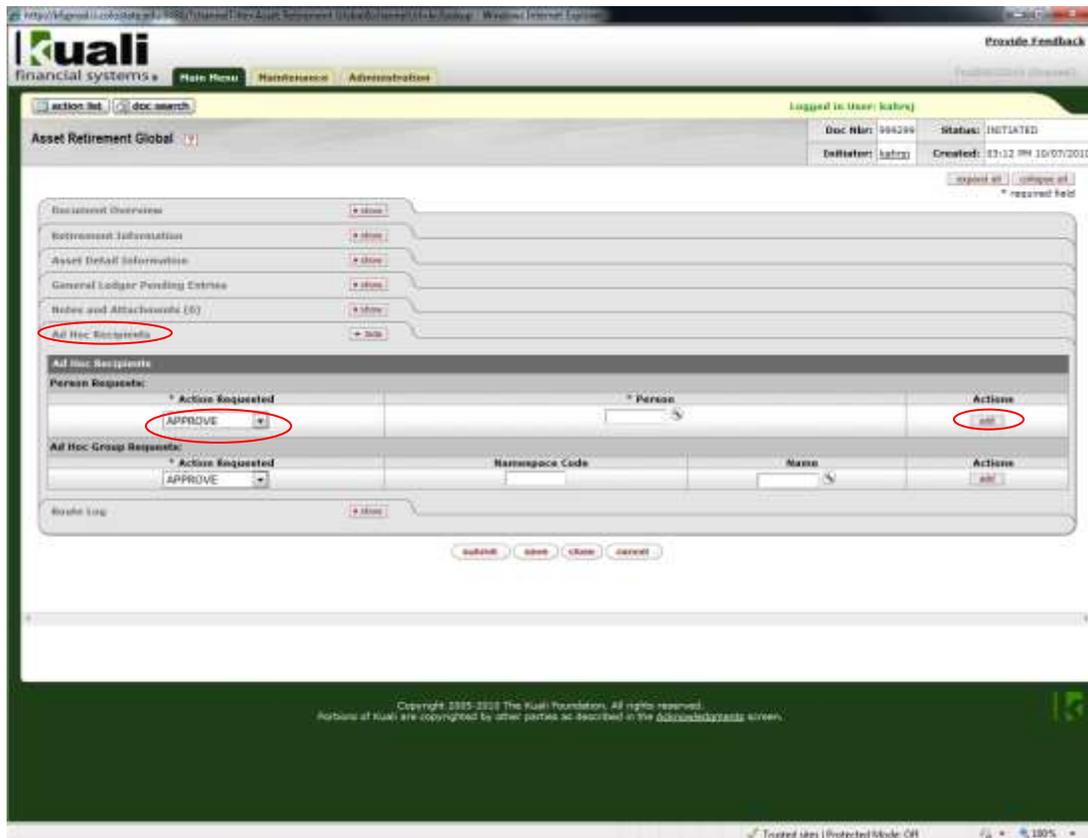
You can type this up in a word document and attach it or just write it directly in the document as a note. (If you are doing several write-off documents it might be helpful to do this in a word document so that you can attach the same one to all of your documents!) When you have finished you must click the **Add** button to the very right or your note will be lost!

The screenshot shows a web application interface for asset management. The interface is divided into several sections:

- Document Overview:** Includes fields for Description, Org. Doc. #, and Explanation.
- Retirement Information:** Includes fields for Retirement Reason, Retirement Reason Code (3 - Loss), and Retirement Date.
- Asset Detail Information:** Includes a field for Asset Number and a button for "Look Up/Add Multiple Asset Lines".
- Notes and Attachments (0):** This section is highlighted with a red circle. It contains a table with the following columns: Pasted Timestamp, Author, Note Text, Attached File, and Actions. The Actions column contains an "add" button, which is also highlighted with a red circle.
- Additional Sections:** Includes "All Rec. Receipts" and "Audit Log".

At the bottom of the interface, there are buttons for "submit", "save", "close", and "cancel". The footer contains copyright information: "Copyright 2005-2010 The Kuali Foundation. All rights reserved. Portions of Kuali are copyrighted by other parties as described in the Acknowledgments screen."

- 5.) The last tab you need to fill out for this document is the **Ad Hoc Recipients** tab. **You need to add your department head as an APPROVER for this document.** To do this click on the magnifying glass to the right of the **Person** field and search for your department head's name and select return value for the appropriate person. You must remember to click the **Add** button or the ad hoc will not be added and your document will be disapproved!



- 6.) Click on submit at the very bottom of the document 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.