

Creating a Loan Document in Kuali

First you need to find the asset you wish to loan (check-out). 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**. Search by entering the CSU decal number into the **Tag Number** field. Once you find your asset, click on **Loan** in the actions to the left. You will see the following screen.

The screenshot displays the Kuali system interface. At the top, there is a 'Document Overview' section with fields for '* Description:', 'Org. Doc. #:', and 'Explanation:'. Below this is the 'Asset' tab, which contains a 'hide' button and a table of 'Asset Information'. The table lists various details for an asset, including its number, description, organization, and acquisition details.

Asset Information	
Asset Number:	1931
Asset Description:	SPECTROMETER
Organization Owner Chart Of Accounts Code:	BL
Organization Owner Account Number:	1024797
Owner:	
Organization Code:	CHEM
Asset Status Code:	A
Asset Condition:	G
Acquisition Type Code:	N
Asset Type Code:	401
Vendor Name:	BINKLEY CORPORATION
Manufacturer:	BINKLEY CORPORATION
Model Number:	14035
Serial Number:	6076
Tag Number:	A134545
Old Tag Number:	
Government Tag:	
National Stock Number:	
In-Service Date:	06/19/1980
Create Date:	06/19/1980
Fiscal Year:	1980
Last Inventory Date:	04/15/2009 05:33 PM
Period:	07

1. As with all other documents in Kuali, you will need to enter a **Description** in the **Document Overview** tab.
2. Browse through the Asset Information in the **Asset** tab to make sure this is the asset you want to loan.
3. On the **Equipment Loans** tab, you'll need to do a lookup for the **Borrower ID**, and then enter the **Expected Return Date**. The document will only allow you to enter a return date 2 years or less from the loan date. You will need to renew the loan every two years if the equipment is being loaned long term. It auto-fills the **Loan Date** with the current date, although you can manually change it.
4. You'll then need to fill out the **Borrower's Address** tab with their information, including the location of where the asset will be housed. It does not auto-fill based on user ID.

Equipment Loans hide

Equipment Loan Information

* Borrower ID:	<input type="text"/>	Loan Date:	04/16/2009
* Expected Return Date:	<input type="text"/>		

Borrower's Address hide

Borrower		Stored at	
* Address:	<input type="text"/>	Address:	<input type="text"/>
* City:	<input type="text"/>	City:	<input type="text"/>
* State:	<input type="text"/>	State:	<input type="text"/>
* Postal Code:	<input type="text"/>	Postal Code:	<input type="text"/>
Country:	<input type="text"/>	Country:	<input type="text"/>
Phone:	<input type="text"/>	Phone:	<input type="text"/>

Asset Location show

Organization show

Processed Payments show

Payments Lookup show

Notes and Attachments (0) show

Ad Hoc Recipients show

An important thing to note is that the Borrower will need to approve this document so please be sure that they are aware of this and have access to Kualii!! If they do not have access to Kualii (because they are in another country, etc.) please contact us so that we can make arrangements to have the document pushed through without their approval!

- Click on submit when you are finished. You will get an error message if any required fields were left blank or filled in with inappropriate data. Otherwise, you will see the message **Document was successfully submitted** at the top of the document!