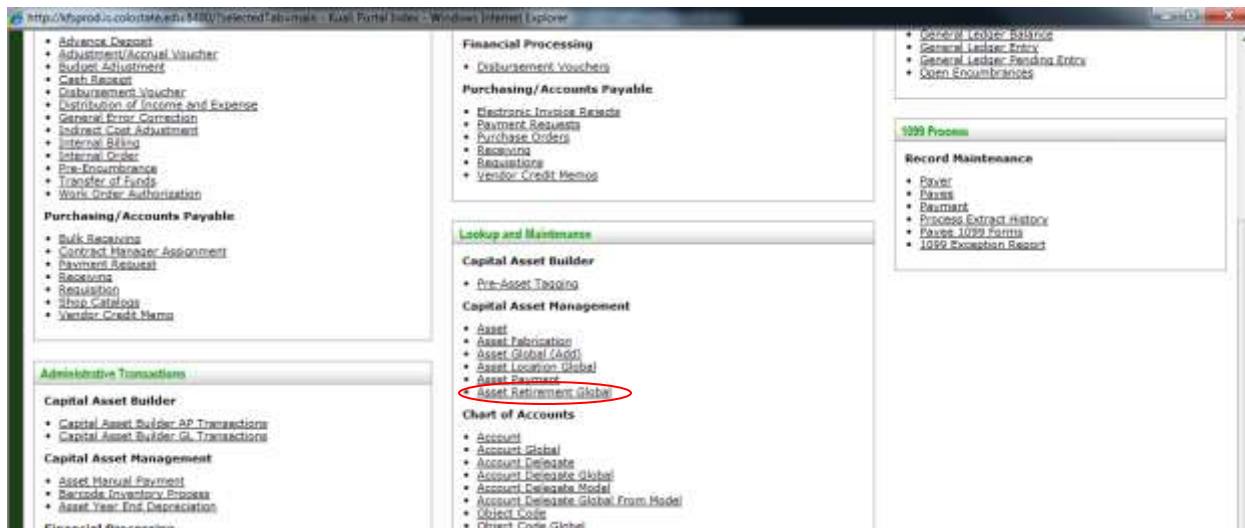
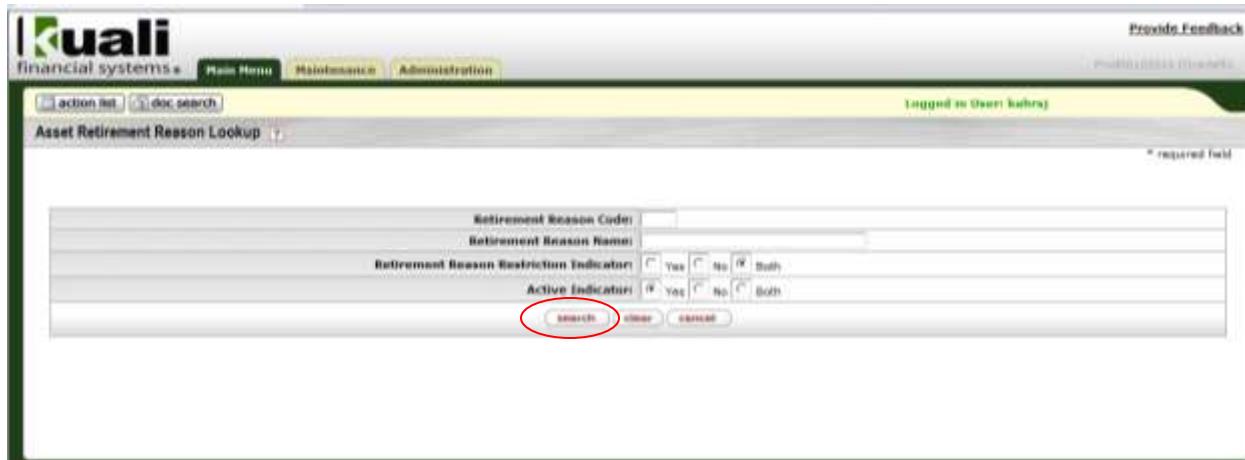


Creating a Trade-In Document in Kuali

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.



Click on the **return value** link for reason code 2, **trade-in**.

The screenshot shows a search interface for Asset Retirement Reasons. At the top, there are fields for 'Retirement Reason Code' (a dropdown menu), 'Retirement Reason Name' (a text input field), 'Retirement Reason Restriction Indicator' (radio buttons for Yes, No, Both), and 'Active Indicator' (radio buttons for Yes, No, Both). Below these are 'search', 'clear', and 'cancel' buttons. The main area displays a table of 19 items, each with columns for Return Value, Retirement Reason Code, Retirement Reason Name, Retirement Reason Restriction Indicator, and Active Indicator. The 'Return Value' column for reason code 2 ('Trade-in') is circled in red.

Return Value	Retirement Reason Code	Retirement Reason Name	Retirement Reason Restriction Indicator	Active Indicator
0	Credit	Credit	Yes	Yes
1	Sale	Sale	Yes	Yes
2	Trade-in	Trade-in	No	Yes
3	Lost	Lost	No	Yes
4	Recycled	Recycled	Yes	Yes
5	Cannibalized	Cannibalized	Yes	Yes
6	Gift	Gift	Yes	Yes
7	Theft	Theft	No	Yes
8	Destroyed	Destroyed	Yes	Yes
9	External Transfer	External Transfer	No	Yes
A	Auction (public surplus auction)	Auction (public surplus auction)	Yes	Yes
B	Check Canceled	Check Canceled	Yes	Yes
C	Asset Created in Error	Asset Created in Error	Yes	Yes
H	Retirement of Control Assets	Retirement of Control Assets	Yes	Yes
J	General Error Correction	General Error Correction	Yes	Yes
M	Merged	Merged	Yes	Yes
P	Plant Fund Retirement	Plant Fund Retirement	Yes	Yes
R	Razed	Razed	Yes	Yes
S	Asset Separated Retirement	Asset Separated Retirement	Yes	Yes

Export options: CSV | spreadsheet | XML.

When you select **return value** for the trade-in retirement reason you will see the following screen.

The screenshot shows the 'Asset Retirement Detail' page for reason code 2 ('Trade-in'). It includes sections for Document Overview, Financial Information, Asset Details, and General Ledger Pending Entries. A large 'Return Value' field is highlighted with a red circle. The status bar at the bottom indicates 'Status: INITIALIZED' and 'Created At: 11:51 AM 08/22/2010'.

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

You will use the explanation field (also located in the **Document Overview** tab) to put in the requisition number for the new piece of equipment and any other notes you wish.

The next tab 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**.

The screenshot shows the 'Asset Lookup' page in a web browser. At the top, there are tabs for 'action list', 'doc search', 'Main Menu', 'Maintenance', and 'Administration'. The user is logged in as 'kaliex'. The main form has fields for 'Tag Number' (containing '321564'), 'Organization Owner Chart Of Accounts Code', 'Organization Owner Account Number', 'Campus', 'Building Room Number', 'Asset Status Code', 'Vendor Name', 'Model Number', 'Create Date From', 'Asset Representative Principal Name', 'Asset Number', 'Organization Owner Organization Code', 'Owner', 'Building Code', 'Asset Type Code', 'Asset Condition', 'Manufacturer', 'Serial Number', 'Create Date To', 'Organization Inventory Name', 'Asset Description', 'Organization Text', 'National Stock Number', 'Old Tag Number', 'Total Cost', 'Payment Purchase Order Number', 'Government Tag', 'Organization Tag Number', 'Payment Sequence Number', and 'Payment Document Number'. Below the form, a message says 'One item retrieved.' followed by a table with one row. The table has columns: Return Value, Asset Number, Tag Number, Organization Owner Organization Code, Building Code, Asset Status Code, Asset Description, Asset Type Code, and In-Service Date. The row contains: Return Value (circled), Asset Number (321564), Tag Number (321564), Organization Owner Organization Code (3012), Building Code (0420), Asset Status Code (A), Asset Description (LUKE PAY STATION WITH A/C POWER AND HEATER), Asset Type Code (0002202), and In-Service Date (08/31/2007). At the bottom left, it says 'Export options: CSV | spreadsheet | XML'. At the bottom right, it says 'Trusted sites | Protected Mode: Off' and shows zoom controls (100%).

Return Value	Asset Number	Tag Number	Organization Owner Organization Code	Building Code	Asset Status Code	Asset Description	Asset Type Code	In-Service Date
Return value (circled)	321564	321564	3012	0420	A	LUKE PAY STATION WITH A/C POWER AND HEATER	0002202	08/31/2007

When you get back to the main screen of the document and the asset number is showing in the **Asset Number** field you must click the **Add** button to pull the asset info into the document.

The screenshot shows a Microsoft Word document titled "Asset Retirement Global". The document has several sections: "Document Overview", "Retirement Overview", "Retirement Information", "New", "Retirement Reason", "Retirement Reason Code", "Retirement Date", "Asset Details Information", "New Asset Retired", "Asset Number" (containing "100110"), and "Notes and Attachments (0)". A red circle highlights the "Add" button next to the "Asset Number" field. At the bottom, there are tabs for "Document", "Review", "Track Changes", and "Format". The status bar at the bottom right shows "Trusted sites | Protected Mode: OFF | 100%".

At this point you may add any notes or attachments you need to add in the **Notes and Attachments** tab and ad hoc anyone you need to ad hoc in the **Ad Hoc Recipients** tab.

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.