Sign on to the Training Lab Computer

USC training room 101
Sign into the computer with:

**user id:**

*islab*

**password:**

*TrainingIsFun!*

Use the internet browser option

Type CSU into the search engine
Select **www.colostate.edu/**

Select “C” from the A-Z

Select Campus Administrative Portal CAP
Sign on to the Training Site

Link: CSU CAP (CAMPUS ADMINISTRATION PORTAL)
http://padroni.is.colostate.edu:7778/portal/page/portal/CAPQA

Sign into CAP with your EID and password

Non-production applications:
Training Kuali Financial System (KFS)

Choose your campus
Asset edit documents

- Transferring department
- Surplus disposition
- Description or detail correction
- Location change
- Asset Representative Principal Name change
- Repair or Maintenance history
Asset Edit Practice Activity

*In the “TRAINING” environment

Use the following criteria in your document: Asset Rep is leaving; item will be re-located to the main office of your building; you will be the custodian.

1) Search your Organization code for the asset you want to transfer

2) Enter the Description and Explanation of your document

3) Verify the Building Code and change the Building Room Number

4) Delete the current Asset Representative then search and enter your name

5) Add an FYI to the previous Asset Representative

6) Save document

Leave the doc up for the next activity
Asset Edit Practice Activity

*In the “TRAINING” environment

*Transfer an asset from your department to Surplus.

1) Find the asset you want to transfer (or use the asset from the previous activity)

2) Clear org account number and click on the magnifying glass to start your search

3) Enter the department number you are looking for in the organization code field

4) Click on any of the 4 digit department number links that appear in the records

5) Locate the organization default account number in the pop up window

6) Select the correct account from the record screen then click return value
Part 2 Asset Loan Documents

• Initial loan document for any equipment located off campus for more than 30 days
  • Checked out to a department representative for use in the “field”
  • Sent out for repair or maintenance for more than 30 days
  • Long term use under a CSU project but not at a CSU facility
  • Any asset stored at an off site facility for more than 30 days
  • Assets purchased for satellite locations

• Renewing a loan document
  • For extended use of equipment off campus
  • Offsite project or research contract has been extended
  • Approved work from home situations

• Returning a loaned asset to campus
  • May be coming back to a: Location|Representative|Department, different than the original record reflects

Maximum loan term cannot exceed 2 years. At the time of loan, PMO requires verification of:
  • current use
  • custodian
  • project status
  • physical stored at address
Asset Loan Practice Activity

*In the “TRAINING” environment

*Loan an asset from your department to yourself for use at your home

1) Find the asset you want to transfer
2) Click “loan”
3) Enter the Description and Explanation
4) Search and enter your Borrower ID
5) Enter projected return date or 2 years if you anticipate an extended loan
6) Enter the contact information of borrower and if different, the location at which the asset will be physically used
7) Add Notes regarding the nature of use including project and/or contract info
8) Ad Hoc the custodian of the loaned equipment
9) Save the document
Part 3 - Asset Retirement global Documents

- Official Retirement Codes
  - Trade – in
  - Lost
  - Theft
  - External Transfer

- Retirement due to event
  - Cannibalization
  - Modification
  - Destroyed
  - Component separation
Retire an asset from your department due to Trade-In

Kuali... Lookup and Maintenance... Asset Retirement Global

1) “Search” for retirement codes and “return value” for Trade-in
2) Describe the reason for your document
   3) Enter the asset number (or search using other criteria and return value)
      4) Click “add” for each asset
         5) Describe the circumstances of the trade, including requisition number in the “Note Text”
            6) Attach quote showing the trade in value, Click “add”
               7) Attach trade approval from Surplus Property, Click “add”
                  8) Ad Hoc Head of the Department and relevant interested parties
                     9) Save the document
Betterment/upgrade | Modify Existing Asset

- Adding functionality
- Increasing capacity
- Enhancing performance
- Upgrade of existing components
- Extension of life by replacement of component

Result:

Betterment: modification and/or expenditure that significantly extends the useful life of an asset

Action:

For purchases see the capital asset checklist on the PMO webpage. For internal modification contact Property Management ASAP to adjust the asset record
Cannibalization

- Parts Machine
- Removing integral components for other uses
- De-manufacturing
- Re-manufacturing into a different machine
- Re-purposing the machine so it no longer performs its original function

Result:

Original asset is no longer operational in its original capacity and has a significant reduction in value and useful life

Action:

Create an edit doc to Surplus requesting retirement – Cannibalization must be verified and all remaining parts must be picked up by Surplus
Component separation

- Removal of components
- Detachment from configuration
- Incorporating components from other machines
- Breaking apart a “system” of units
- Separating a primary unit from secondary unit
- Attachment of or to a different configuration
- Reconfiguration of components

Result:

Original “asset” is no longer in its original configuration thereby either reducing or increasing its recorded value

Action:

Contact Property Management ASAP to adjust the asset record
Recommended training modules:

- **APO Certification** — *Head of Departments i.e.: Chairs, Directors, Controllers, or equivalent position titles*
- **DPC Certification** — *CAM processors appointed as the primary Property Manager in their department*
- **Asset Representative Certification** — *Any faculty, or staff with assigned assets in the CAM database*
- **CAM Processing modules** — *APO, DPC and all CAM processors*
  - Asset Edit
  - Asset Loan
  - Asset Retirement Global
  - Asset Management Reports
- **Equipment Inventory** — *APO, DPC, CAM processors and Asset Representatives*
- **Asset Disposition** — *All employees of the department/unit*
Thank you for watching this presentation by the Property Management Office

491-1045 Rachel Drenth – Inventory Specialist / Data Entry
491- 1358 Mack Freestone – Inventory Specialist / Data Entry
491-2270 Debra Ellison – Requisitions / Accounting
491-6513 Linda Brucker – Lease / Accounting
491-2040 Genevra Scott – Administrator / Accounting

Please call us! We are available to help with any document!

Capital Asset Management (CAM) Processor Training

CAM Documents