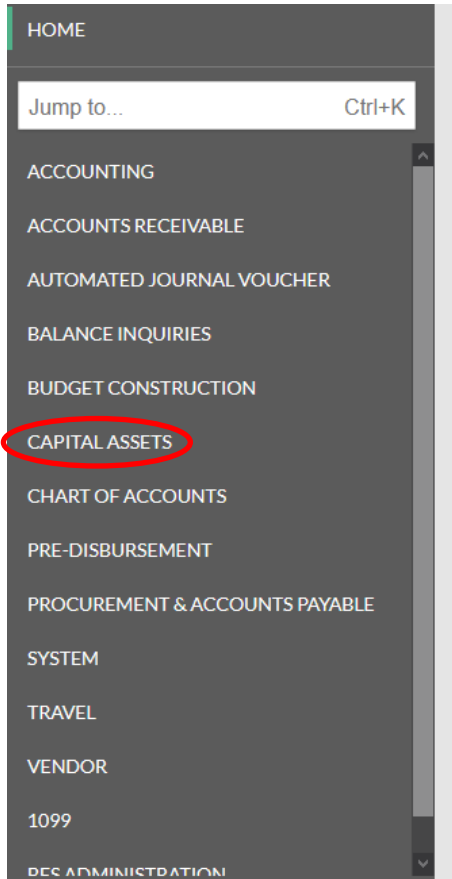


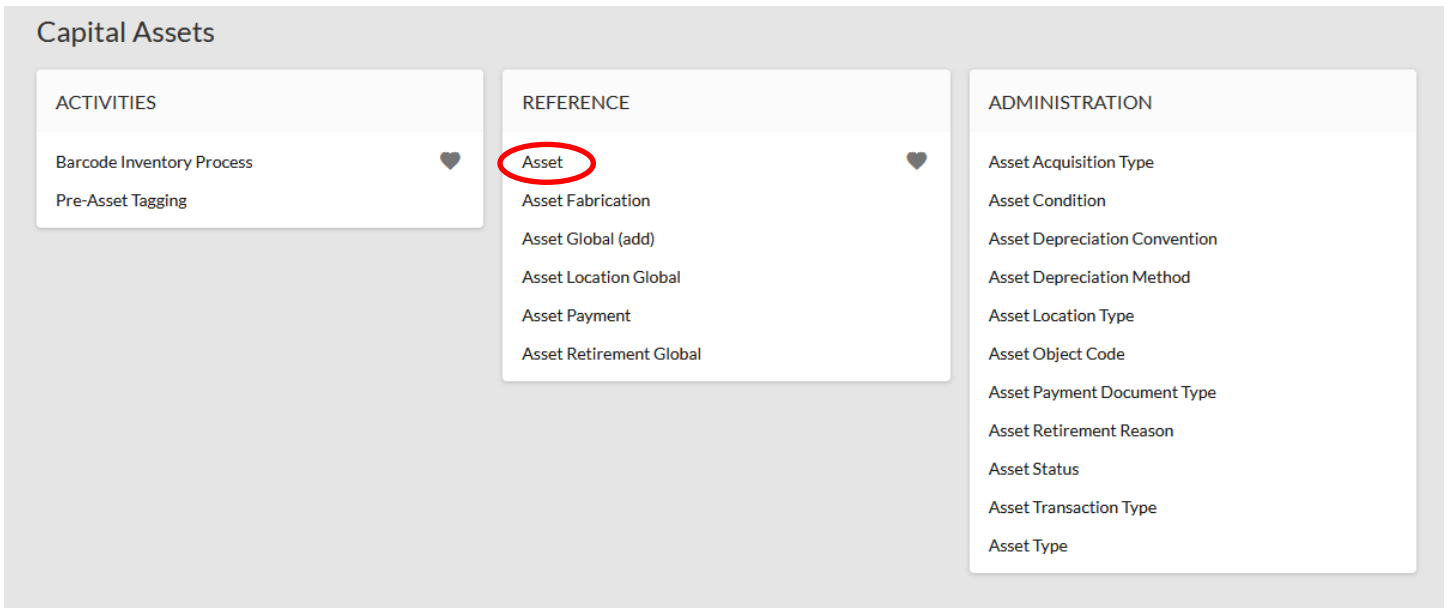
## Creating a Department Change Document in Quali

**PURPOSE:** To change the custody of an asset from one department to another.

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.

## Asset Lookup

Tag Number:

Asset Number:

Organization Owner Chart Of Accounts Code:

Organization Owner Organization Code:

Organization Owner Account Number:

Owner:

Campus:

Building Code:

Building Room Number:

Asset Type Code:

Asset Status Code:

Asset Condition:

Vendor Name:

Manufacturer:

Model Number:

Serial Number:

Create Date From:

Create Date To:

Asset Representative Principal Name:

Organization Inventory Name:

When the search results are retrieved, confirm it is the correct asset and click on **Edit** in the actions box.

### Search Results

Actions	Asset Number	Tag Number	Organization Owner Organization Code	Building Code	Asset Sta
<a href="#">edit</a>   <a href="#">open</a>   <a href="#">renew</a>   <a href="#">return</a>   <a href="#">merge</a>   <a href="#">separate</a>	<a href="#">504885</a>	<a href="#">325325</a>	<a href="#">1018</a>	<a href="#">0041</a>	<a href="#">A</a>

Export options: [CSV](#) | [spreadsheet](#) | [XML](#)

An Asset Edit Document will open.

OVERVIEW

\* Description:

Organization Document Number:

Explanation:

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ASSET DETAIL INFORMATION

PREVIOUS	PROPOSED
Asset Detail Info	Asset Detail Info
Asset Number: 504885	Asset Number: 504885
Organization Owner Chart Of Accounts Code: CO	* Organization Owner Chart Of Accounts Code: CO
Organization Owner Account Number: 1352520	* Organization Owner Account Number: 1352520
Organization Owner Organization Code: 1018	Organization Owner Organization Code: 1018
Owner: CSU	Owner: CSU
Acquisition Type Code: Pre-Asset Tagging	Acquisition Type Code: Pre-Asset Tagging
Asset Status Code: A	* Asset Status Code: A
Asset Condition: Good-Operational	* Asset Condition: Good-Operational
Asset Description: BLADE SERVER	* Asset Description: <input type="text"/>
Asset Type Code: 302705	* Asset Type Code: 302705
Vendor Name: HEWLETT PACKARD CO	Vendor Name: HEWLETT PACKARD CO
Manufacturer: HEWLETT PACKARD	Manufacturer: HEWLETT PACKARD
Model Number: PROLIANT BL460C G7	Model Number: PROLIANT BL460C G7
Serial Number: USE209WV54	Serial Number: USE209WV54
Tag Number: 325325	Tag Number: 325325
Old Tag Number: <input type="text"/>	Old Tag Number: <input type="text"/>
Government Tag: <input type="text"/>	Government Tag: <input type="text"/>
National Stock Number: <input type="text"/>	National Stock Number: <input type="text"/>
Last Inventory Date: 07/31/2020	Last Inventory Date: 07/31/2020

Enter a **Description** in the **Document Overview** tab. *Example:* Transfer asset to chemistry.

Use the **Explanation** field (also located in the **Document Overview** tab) to provide any specific notes regarding the transfer. *Example:* PI transferred to a new department.

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 or look-up (by clicking the magnifying glass icon) the Proposed (new) **Organization Owner Account Number** default number. *Note:* The Default number is used to assign and identify the responsible department for capital assets only, no financial transactions will post.

The screenshot shows the 'ASSET LOCATION' form with two columns: 'PREVIOUS' and 'PROPOSED'. The 'PREVIOUS' column has the following values: On Campus, Campus: MC, Building Code: 0041, Building Room Number: E07, Building Sub Room Number: Off Campus, Name: , Address: , City: , State: , Postal Code: , Country: . The 'PROPOSED' column has: On Campus, Campus: MC, Building Code: 0041, Building Room Number: E07, Building Sub Room Number: , Name: , Address: , City: , State: , Postal Code: , Country: . Red circles highlight the magnifying glass icons next to the Building Code and Building Room Number fields in the PROPOSED column. An 'Update' button is at the bottom right.

If using the magnifying glass icon, clicking on it will open the Account Lookup screen.

The screenshot shows the 'Account Lookup' form with various fields: Chart Code (CO), Account Number (1372090), Account Title, Organization Code, Responsibility Center Code, Reports to Organization Code, Reports To Chart Of Accounts Code, Account Type Code, Fund Group Code, Sub-Fund Group Code, Higher Education Function Code, Fiscal Officer Principal Name, Account Supervisor Principal Name, and Account Manager Principal Name. Red circles highlight the magnifying glass icons next to the Account Number and Organization Code fields. A 'Search' button is at the bottom, along with 'Clear' and 'Cancel' buttons. Radio buttons for 'Closed?' are set to 'No'.

Delete the current account number shown in the **Account Number** field and search for the new Account Number by entering the department number you want to transfer the asset to in the **Organization Code** field and clicking on **search**. All account numbers available for the entered Organization Code will be retrieved.

Chart Code:  Account Number:

Account Title:  Organization Code:

Responsibility Center Code:  Reports To Organization Code:

Reports To Chart Of Accounts Code:  Account Type Code:

Fund Group Code:  Sub-Fund Group Code:

Higher Education Function Code:  Fiscal Officer Principal Name:

Account Supervisor Principal Name:  Account Manager Principal Name:

Classed?  Yes  No  Both

Search Clear Cancel

Search Results

Return Value	Chart Code	Account Number	Account Title	Organization Code	Responsibility Center Code	Reports To Organization Code	Account Type Code	Fund Group Code	Sub-Fund Group Code	Higher Education Function Code	Fiscal Officer Name	Account Manager Name	Account Supervisor Name	Account Create Date	Account Expiration Date	Closed?
<a href="#">return value</a>	CO	1264900	Rm Symposium Protona&Chem	<u>1872</u>	LA	LA	NA	B	DCE&UP	IN&P	Kahler, Karen Elizabeth	Kahler, Karen Elizabeth	Shores, Matthew Paul	07/01/2009		No
<a href="#">return value</a>	CO	1264900	Chemistry	<u>1872</u>	LA	LA	NA	B	DCE&UP	IN&P	Kahler, Karen Elizabeth	Kahler, Karen Elizabeth	Shores, Matthew Paul	07/01/2009		No
<a href="#">return value</a>	CO	1300450	Chemistry Misc Revenue - General Operations Replacement	<u>1872</u>	LA	LA	MR	A	EG	A&A	Kahler, Karen Elizabeth	Kahler, Karen Elizabeth	Shores, Matthew Paul	07/01/2009		No
<a href="#">return value</a>	CO	1338000	Acct Default	<u>1872</u>	LA	LA	NA	A	EG	IN&A	Kahler, Karen Elizabeth	Kahler, Karen Elizabeth	Shores, Matthew Paul	07/01/2009		No
<a href="#">return value</a>	CO	1338100	Graduate Recruiting	<u>1872</u>	LA	LA	NA	A	EG	A&A	Kahler, Karen Elizabeth	Kahler, Karen Elizabeth	Shores, Matthew Paul	07/01/2009		No
<a href="#">return value</a>	CO	1338121	Joseph Zabrany Start-Up	<u>1872</u>	LA	LA	SU	A	EG	B&ZZ	Kahler, Karen Elizabeth	Kahler, Karen Elizabeth	Shores, Matthew Paul	03/25/2017		No
<a href="#">return value</a>	CO	1338122	Jeffrey Sander Start-Up	<u>1872</u>	LA	LA	SU	A	EG	B&ZZ	Kahler, Karen Elizabeth	Kahler, Karen Elizabeth	Shores, Matthew Paul	03/25/2017		No
<a href="#">return value</a>	CO	1338123	Justin Sambur Start-Up	<u>1872</u>	LA	LA	SU	A	EG	B&ZZ	Kahler, Karen Elizabeth	Kahler, Karen Elizabeth	Shores, Matthew Paul	05/02/2016		No

Click on the underlined **department** number in the **Organization Code** column of the search results. The following organization inquiry will open in a separate window.

ORGANIZATION DETAILS

Chart Code: CO** Colorado State University	Organization Code: 1872
Organization Name: Chemistry	Organization Manager User ID: 5083
Organization Manager Principal Name: cperregoy@colorstate.edu -- Perregoy, Cheryl L	Organization Manager Name: Perregoy, Cheryl L
Responsibility Center Code: LA	<u>Organization Default Account Number: 1338210</u>
Organization Type Code: D - Department	Organization City Name: Fort Collins
Organization Postal Code: 80523	Organization Country Code: United States
Organization Address Line 2:	Organization End Date:
Organization State/Province Code: CO	Reports to Organization: LA
Organization Begin Date: 01/01/2007	Organization Plant Chart: CO** Colorado State University
Reports to Chart Code: CO** Colorado State University	Campus Plant Chart Code: CO** Colorado State University
Active Indicator: Yes	HRMS Company:
EDIT PLANT ACCOUNT SECTION:	Address-2:
Organization Plant Account Number: 7720000	Building:
Campus Plant Account Number: 7730000	Position Allowed: No
EDIT HRMS UNIT SECTION:	Title Allowed: No
Address-1:	Personnel Approver Principal Name: -
Campus:	Fiscal Approver Principal Name: -
Room:	Last Update Date:
Tenure Allowed: No	
Occupational Unit Allowed: No	
Personal Approver Name:	
Fiscal Approver Name:	

Locate the **Organization Default Account Number** for the selected department. Write it down or remember it. Close out the inquiry window to return to your search results. Locate the default account in the results and click on **return value** at the left of the search results. You will return to the document with the **Organization Owner Account Number** and the **Organization Owner Organization Code** (department number) both populated.

In the **Asset Location** tab, if the asset will be physically moved to a new location, enter the proposed **Building Code** and/or **Building Room Number** fields. Search for these codes by clicking on the magnifying glass icon and searching by building name. *Note:* If the asset is in the same location shown, skip to the next tab.

ASSET LOCATION

<b>PREVIOUS</b>	<b>PROPOSED</b>
On Campus	On Campus
Campus: MC	Campus: MC
Building Code: 1101	Building Code: 1101
Building Room Number: 5101	Building Room Number: 5101
Building Sub Room Number:	Building Sub Room Number:
<b>Off Campus</b>	<b>Off Campus</b>
Name:	Name:
Address:	Address:
City:	City:
State:	State:
Postal Code:	Postal Code:
Country:	Country:
	Update Last Inventory Date: Update

In the **Organization Information** tab, update the proposed (new) **Asset Representative Principal Name**. Click on the magnifying glass icon to the right of the field to search for the new asset representative's name. *Note:* When the Person Lookup screen appears, delete the current name in the **Principal Name** field. Enter the new name in the **Last Name** field and click on search. Once results are retrieved, select the correct person, then click on **return value**. You will return to the document. *Note:* The **Asset Representative Name** field will auto-fill with the same name as the **Asset Representative Principal Name**.

ORGANIZATION INFORMATION	
PREVIOUS	PROPOSED
Organization Inventory Name: MAHMOUD, HUSSAM N	Organization Inventory Name: MAHMOUD, HUSSAM N
Asset Representative Principal Name: hmahmoud@colostate.edu - Mahmoud, Hussam N	Asset Representative Principal Name: hmahmoud@colostate.edu - Mahmoud, Hussam N
Asset Representative Name: Mahmoud, Hussam N	Asset Representative Name: Mahmoud, Hussam N
Organization Text:	Organization Text:
Organization Tag Number:	Organization Tag Number:
Organization Asset Type Identifier:	Organization Asset Type Identifier:
Receive Date:	Receive Date:
Replacement Amount:	Replacement Amount:
Estimated Sale Price:	Estimated Sale Price:

Provide any notes and attachments in the **Notes and Attachments** tab. You must click on the **Add** button or you will lose the attachment.

NOTES AND ATTACHMENTS (0)

\* Note Text:

Attachment:

Browse... No file selected.

Remove Attachment

ADD

In the **Ad Hoc Recipients** tab, add anyone that is required or necessary (and not already shown in the route log) by clicking on the magnifying glass icon to the right of the **Person** field. Search for required approvers by clicking on the magnifying glass icon to the right of the **Person** field. Select **return value** for the appropriate person(s). Select the **Action Requested** using the drop down. *Note:* You must click the **Add** button or the ad hoc will not be added.

AD HOC RECIPIENTS

PERSON REQUESTS

\*PERSON

\*ACTION REQUESTED

APPROVE

ADD

AD HOC GROUP REQUESTS

\*NAMESPACE CODE

\*NAME

\*ACTION REQUESTED

ACTIONS

APPROVE

ADD

ROUTE LOG

Submit Save Close Cancel

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.

Submit Save Close Cancel