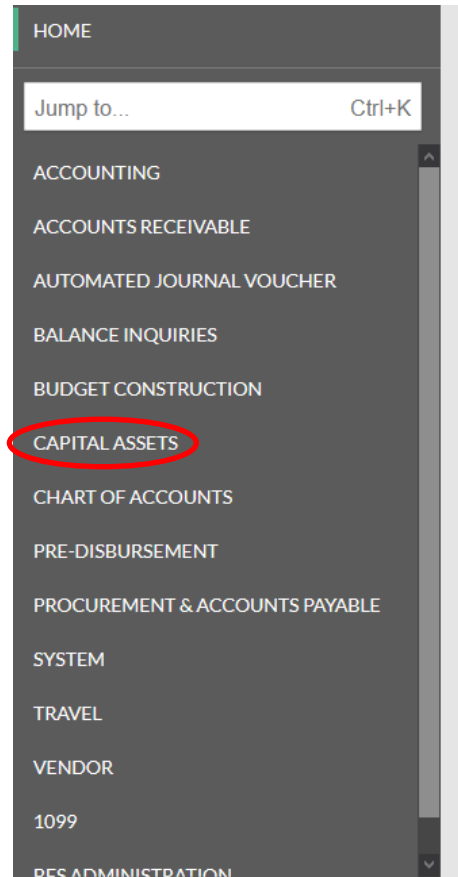


Creating a Surplus Document in Kualii

PURPOSE: To transfer an asset to surplus for repurposing or to be retired from CSU's records. *Note:* The following disposal reasons need the asset record to be transferred to surplus by creating a surplus document in Kualii: Cannibalization requests, Software Termination requests, Sale requests, Equipment Release requests involving an outside entity (including Vendor Removal offers), Destroyed or Damaged asset transfers due to accidents or covered losses, and any other types of disposal reasons involving equipment no longer utilizable or needed by the department. For the following 4 (four) reasons only, the Department will need to submit an Asset Retirement Global document: Theft, Trade-In, External Transfer, and Write-Off (Lost/Improper Disposal).

From the Main Menu screen, click on **Capital Assets**.



In the **Reference** box, click on the **Asset** link.

Capital Assets

ACTIVITIES

Barcode Inventory Process

Pre-Asset Tagging

REFERENCE

Asset

Asset Fabrication

Asset Global (add)

Asset Location Global

Asset Payment

Asset Retirement Global

ADMINISTRATION

Asset Acquisition Type

Asset Condition

Asset Depreciation Convention

Asset Depreciation Method

Asset Location Type

Asset Object Code

Asset Payment Document Type

Asset Retirement Reason

Asset Status

Asset Transaction Type

Asset Type

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
edit loan renew return merge separate	504885	325325	1018	0041	A

Export options: CSV | spreadsheet | XML

An Asset Edit Document will open.

OVERVIEW

* Description:

Organization Document Number:

Explanation:

ASSET DETAIL INFORMATION

PREVIOUS	PROPOSED
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: 3027015	* Asset Type Code: 3027015
Vendor Name: HEWLETT PACKARD CO	Vendor Name: HEWLETT PACKARD CO
Manufacturer: HEWLETT PACKARD	Manufacturer: HEWLETT PACKARD
Model Number: PROLIANT BL460C G7	Model Number: <input type="text"/>
Serial Number: USE20PWV54	Serial Number: <input type="text"/>
Tag Number: 325325	Tag Number: <input type="text"/>
Old Tag Number:	Old Tag Number: <input type="text"/>
Government Tag:	Government Tag: <input type="text"/>
National Stock Number:	National Stock Number: <input type="text"/>
Last Inventory Date: 07/31/2020	Last Inventory Date: 07/31/2020

Submit Save Close Cancel

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

Use the **Explanation** field (also located in the **Document Overview** tab) to enter any specific notes for surplus property that would aid them in picking up your equipment. *Example:* please contact Kelly at 1-2345 to coordinate pickup *or* asset needs to be picked up before August 1st.

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 the Proposed (new) **Organization Owner Account Number** default number. *Note:* The surplus property default number is **2288400**.

In the **Asset Location** tab, update the **Building Code** and **Building Room Number** fields to reflect the current location of the asset where surplus can find the asset and pick it up. *Note:* If the asset is in the same location shown, skip to the next tab.

ASSET LOCATION

PREVIOUS	PROPOSED
On Campus	On Campus
Campus: MC	* Campus: MC
Building Code: 0041	Building Code: 0041
Building Room Number: E07	Building Room Number: E07
Building Sub Room Number:	Building Sub Room Number: <input type="text"/>
Off Campus	Off Campus
Name:	Name: <input type="text"/>
Address:	Address: <input type="text"/>
City:	City: <input type="text"/>
State:	State: <input type="text"/>
Postal Code:	Postal Code: <input type="text"/>
Country:	Country: <input type="text"/>
	Update Last Inventory Date: <input type="button" value="Update"/>

Provide any notes and attachments in the **Notes and Attachments** tab (e.g., Refrigerator, Freezer, and Laboratory Equipment Declaration (RFLE) form [required when sending refrigerators and freezers to surplus], authorizations to

dispose of sponsor owned equipment or sponsor funded equipment on active sponsored projects, etc.). You must click on the **Add** button or you will lose the attachment.

NOTES AND ATTACHMENTS (0)

* Note Text:

Attachment:

No file selected.

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.