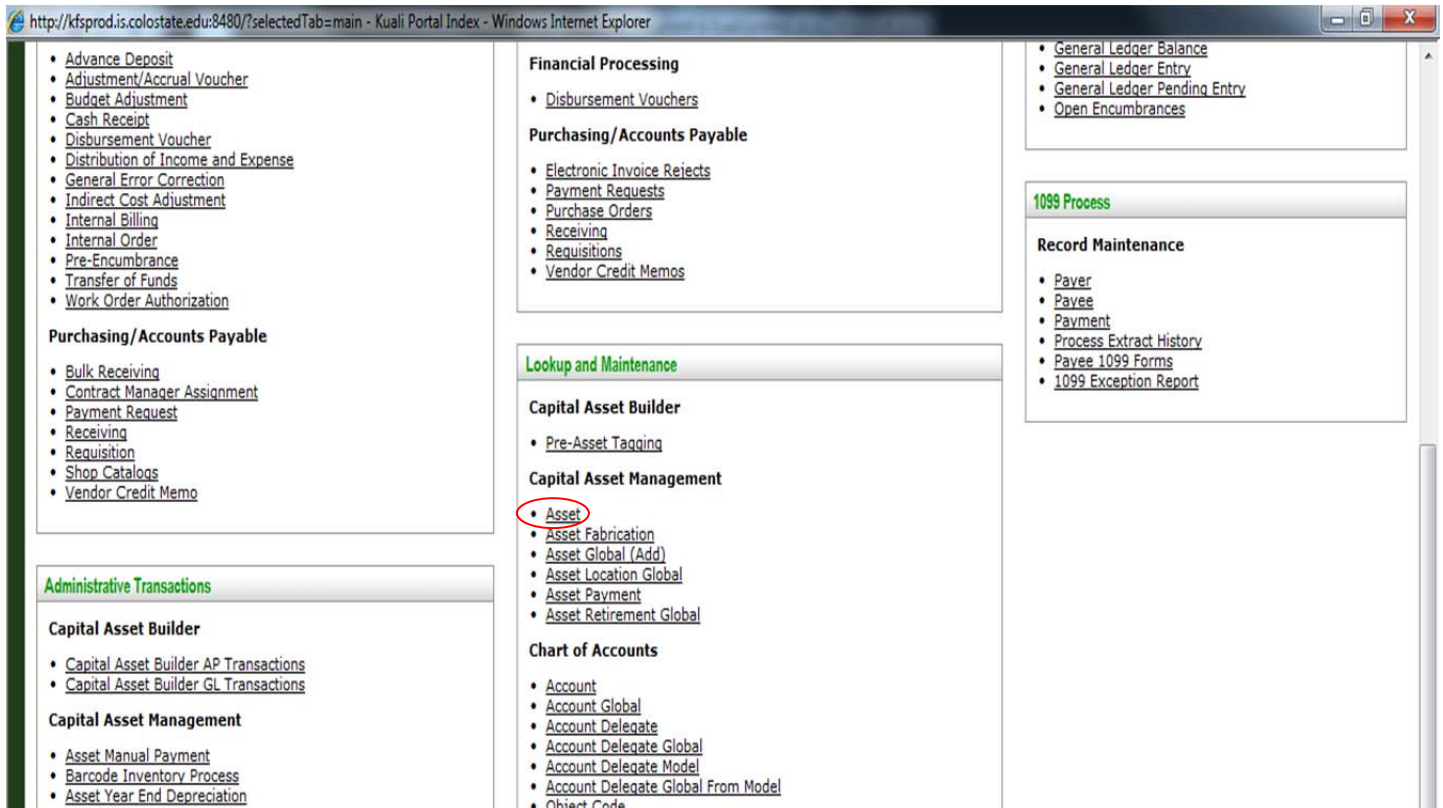# Creating a Loan or Renew or Return Document in Kuali

LOAN: 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**.

You will see the following screen. Search by entering the CSU decal number into the **Tag Number** field.
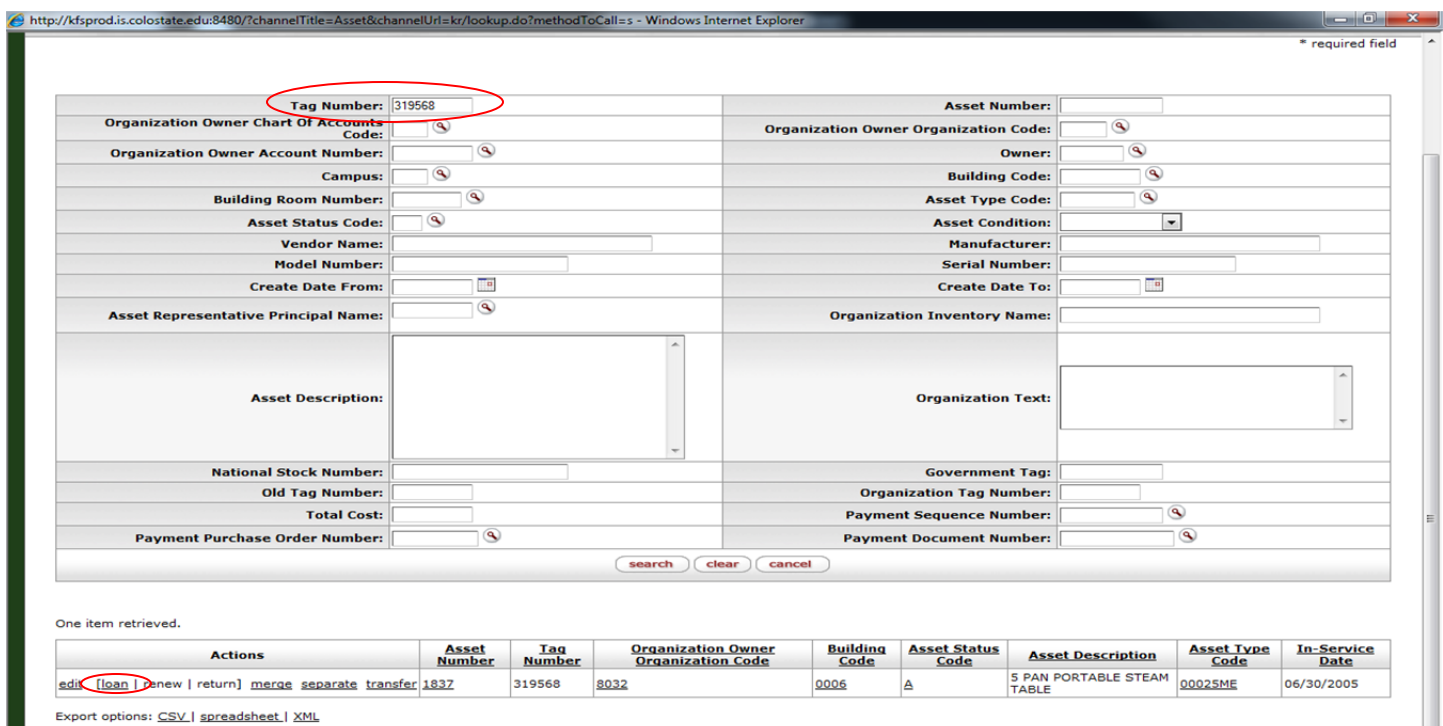
Once you find your asset, click on **loan** in the actions to the left. You will see the following screen.

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 if needed.
   a. **Borrower ID:**
      i. The borrower id entered on the loan document must be active in KFS. Normally this will be the faculty or staff member in possession of the equipment.
      ii. If the borrower is not an active KFS user add their name to the Notes and Attachments tab.
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. If the equipment is located at the borrower's personal residence the user will only need to complete the borrower's address.

5. 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.

RENEW: First you need to find the asset you wish to renew the loan for. Keep in mind the asset must currently be in loan status in CAM in order to be able to renew a loan. 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** (see above in the Loan section for a screen shot). The Asset Inquiry Screen will open and you can search for the asset number by entering the CSU decal number into the **Tag Number** field. Once you find your asset, click on <u>renew</u> in the actions to the left to open the document in order to renew the loan (if the renew link is not underlined then the asset is not currently on loan).

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 renew the loan for.
3. On the **Equipment Loans** tab, you'll need to 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 if needed.
4. 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.

RETURN: First you need to find the asset you wish to return the loan for. Keep in mind the asset must currently be in loan status in CAM in order to be able to return a loan. 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** (see above in the Loan section for a screen shot). The Asset Inquiry Screen will open and you can search for the asset number by entering the CSU decal number into the **Tag Number** field. Once you find your asset, click on <u>return</u> in the actions to the left to open the document in order to return the loan (if the return link is not underlined then the asset is not currently on loan).

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 return.
3. On the **Equipment Loans** tab, you'll need to enter the **Loan Return Date**. The document will only allow you to enter a return date 2 years or less from the loan date.
4. 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.
5. If the asset location has changed you will need to complete an asset edit document as well in order to update the location of the asset now that it has returned to campus. The return document does not allow you to update the location of the asset.