

Transferring Capital Equipment To Surplus

First you need to find the asset you wish to surplus. 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**.

The screenshot shows a main menu with several categories:

- Financial Processing**
 - Disbursement Vouchers
- Purchasing/Accounts Payable**
 - Electronic Invoice Rejects
 - Payment Requests
 - Purchase Orders
 - Receiving
 - Requisitions
 - Vendor Credit Memos
- Lookup and Maintenance**
 - Capital Asset Builder**
 - Pre-Asset Tagging
 - Capital Asset Management**
 - Asset** (circled in red)
 - Asset Fabrication
 - Asset Global (Add)
 - Asset Location Global
 - Asset Payment
 - Asset Retirement Global
 - Chart of Accounts
- Administrative Transactions**
 - General Ledger Balance
 - General Ledger Entry
 - General Ledger Pending Entry
 - Open Encumbrances
- 1099 Process**
- Record Maintenance**
 - Payer
 - Payee
 - Payment
 - Process Extract History
 - Payee 1099 Forms
 - 1099 Exception Report
- Purchasing/Accounts Payable**
 - Bulk Receiving
 - Contract Manager Assignment
 - Payment Request
 - Receiving
 - Requisition
 - Shop Catalogs
 - Vendor Credit Memo

Search by entering the CSU decal number into the **Tag Number** field.

The search form contains the following fields:

- Tag Number: 319568 (circled in red)
- 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: []
- Asset Description: []
- Organization Text: []
- National Stock Number: []
- Government Tag: []
- Old Tag Number: []
- Organization Tag Number: []
- Total Cost: []
- Payment Sequence Number: []
- Payment Purchase Order Number: []
- Payment Document Number: []

Buttons: search, clear, cancel

One item retrieved.

Actions	Asset Number	Tag Number	Organization Owner Organization Code	Building Code	Asset Status Code	Asset Description	Asset Type Code	In-Service Date
edit [loan renew return] merge separate transfer	1837	319568	8032	0006	A	5 PAN PORTABLE STEAM TABLE	00025ME	06/30/2005

Export options: CSV | spreadsheet | XML

Once you find your asset, click on **Edit** in the actions to the left.

You will see the following asset document screen:

The screenshot displays the 'Asset' document screen. At the top, it shows the user is logged in as 'kahrsj'. The document number is 961261, status is INITIATED, initiator is kahrsj, and it was created on 02:41 PM 09/14/2010. The 'Document Overview' tab is selected, showing a form with fields for '* Description:' and 'Explanation:'. Below this is the 'Asset Detail Information' tab, which is split into 'Old' and 'New' sections. The 'Old' section shows asset details for Asset Number 1730, Organization Owner Chart Of Accounts Code CO, Organization Owner Account Number 1315050, Organization Owner Organization Code 1373, Owner CSU, Acquisition Type Code N - New, Asset Status Code A, and Asset Condition G - Good. The 'New' section shows the same details but with a search icon next to the Organization Owner Account Number field and a dropdown menu for the Asset Condition field. The Asset Description is 'DOPPLE RADAR PROFILER SYSTEM'. The Asset Type Code is 75170SI, Vendor Name is LEIPZIG, Manufacturer is LEIPZIG, Model Number is 24 GHZ FM-CW, Serial Number is R213755, and Tag Number is 319687. The 'Last Inventory Date' is 06/20/2005. The bottom of the screen shows a status bar with 'Done', 'Trusted sites | Protected Mode: Off', and a 100% zoom level.

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

Example: Transferring freezer to surplus

You can use the explanation field (also located in the **Document Overview** tab) to put in any specific notes for surplus property that would aid them in picking up your equipment.

Examples: Please contact Kelly at 1-2345 to coordinate pickup

The next tab is the **Asset Detail Information** tab. You'll see all of the current asset info on the left, and a place to enter the new asset info on the right. Enter the new **Organization Owner Account Number**. The Organization Account Number loads the correct department number on the form. The surplus account number will be **2288400**. Department 6026 will show on the form. You may also change the **Asset Condition** in this tab if necessary.

Next you will need to enter the physical location where surplus can find and pick up the asset on the **Asset Location** tab. The **Building Code** and **Building Room Number** fields will need to be filled in. (If they are already correct you don't need to do anything here!)

Asset Location	
Old	New
On Campus	On Campus
Campus: MC	* Campus: MC
Building Code: 0041	Building Code: 0041
Building Room Number: C209	Building Room Number: C209
Building Sub Room Number:	Building Sub Room Number:
Off Campus	Off Campus
Name:	Name:
Address:	Address:
City:	City:
State:	State:
Postal Code:	Postal Code:
Country:	Country:

If you need to attach any documentation to your document you will do so in the **Notes and Attachments** field. Examples of this would be the forms that need to be filled out for surplus when you are surplusting refrigerators and freezers. You must remember to click on the **Add** button after you have attached your file or your attachment will be lost!

Posted Timestamp	Author	* Note Text	Attached File	Actions
			Browse... CANCEL	add

submit save close cancel

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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.