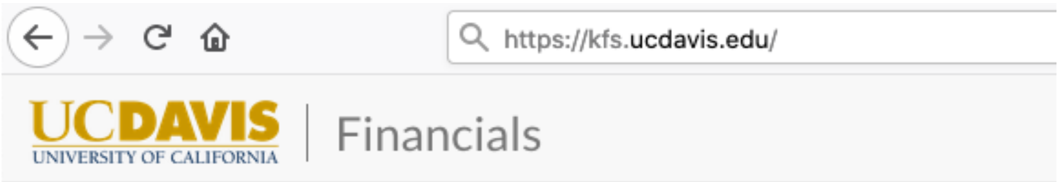
HOW TO DO AN ASSET TRANSFER GLOBAL DOC (aka ATG doc)

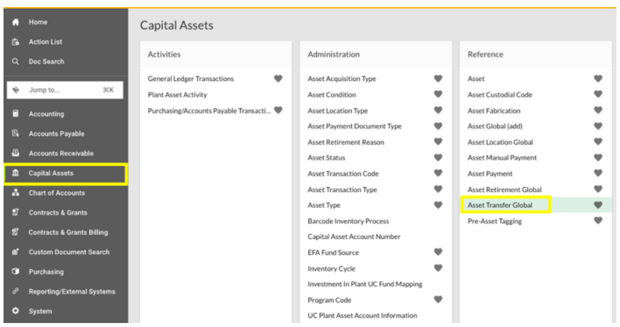
Updated on 04/07/21

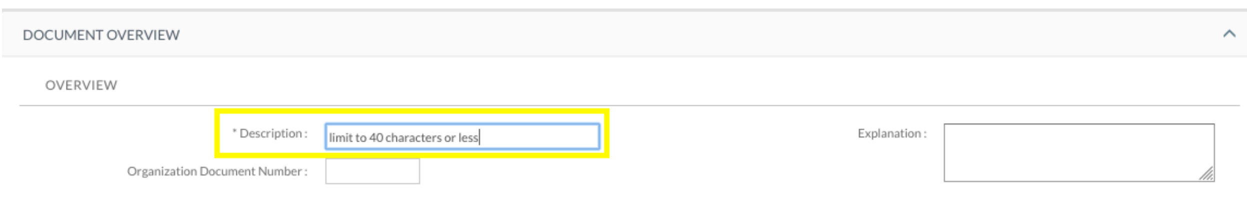
Sign into Kuali (aka KFS)



In the reference column, under **Capital Asset Management System**, click on *Asset Transfer Global*

Every document in Kuali requires a 40 character or less "description."





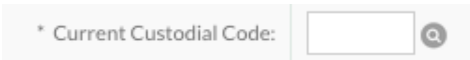
You may put anything you like, but bear in mind this is like the "subject header" of an email – it is what other approvers will see in their KFS inbox and what other KFS users would see if they searched for your document. The description is a searchable field as well, so you are encouraged to spell correctly and put information that will either identify the purpose of the document or identify the asset. For example, "Transfer 20143001234 and 20143001235 to the BB."

The **Explanation** field is **not** mandatory but is much bigger and is an excellent place to put a lengthier reason for the doc, a contact person's info or any other data that would be helpful for you later on. The grey triangle of dots indicates that you can make the field bigger by dragging it:

The **Organization Document Number** is limited to 10 characters and may be used for whatever you like (like a PO number or the loan number for example). It is also a searchable field.

Before you can submit an ATG doc, you'll need to know the custodial code of where it is going. Once you know this information:

Type in the current custodial code (which should be 'your' custodial code):



Type in the destination custodial code. If you needed to look it up, you can use the magnifying glass.

If you need to transfer just one asset, skip the steps immediately below and go to the section "**Transferring One Asset**."

TRANSFERRING MORE THAN ONE ASSET

If you need to transfer two or more assets ***from the same code to another single code***, click on the magnifying glass next to "**Look Up/Add Multiple Asset Lines**" on the right-hand side of the screen across from the "**Edit List of Assets**" tab.

This will bring up the **Asset Lookup** screen. If you know your UCOP numbers, you can enter up to eight at a time in the **UCOP Tag Number** field by separating them with a pipe character ("|").

Example: 20103001231|20163001238. This will bring back just these two assets.

The numbers do not need to be consecutive; however, if they are, you can bring back as many as you need by separating

Select All From All Pages | Deselect All From All Pages | Select All From This Page | Deselect All From This Page | Return Selected

Select?	Asset Number	UCOP Tag Number	Custodial Code	Building Code	Asset Status Code	UCOP Disposal Code	Asset Description	Asset Type Code	Receive Date
☐	500706	733012585	9816	9416	D		DEFIBRILLATOR ANALYZER	F8730	06/01/1973
☐	500708	733014526	9811	9416	A		OVEN	G8621	06/01/1973
☐	503013	833004161	9817	9416	D		KEY CABINET, 1680 KEYS VERTICAL,CHANCELLOR SERIES,	J9810	12/01/1983

the first and last number with two decimal points ("..").

Example: 20103001231..20103001238. This will bring back all the assets in between as well as the first and last numbers listed:

Viewing rows 1 to 9

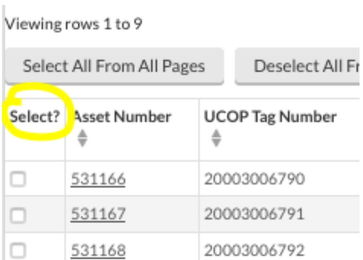
Select All From All Pages | Deselect All Fr

Select?	Asset Number	UCOP Tag Number
☐	531166	20003006790
☐	531167	20003006791
☐	531168	20003006792
☐	531169	20003006794
☐	531170	20003006795
☐	531171	20003006796
☐	531172	20003006797
☐	531173	20003006798
☐	531174	20003006799

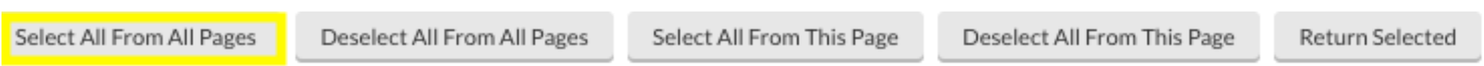
If your numbers don't lend themselves easily to either of the two scenarios above, narrow the search for assets by entering your User ID name under "Asset Representative Principal Name" and if necessary, the custodial code in question. Please note: you cannot move assets from several custodial codes; it must be a "one code to one code" transfer.

When you are ready, click "Search." Your results will be at the bottom of the screen.

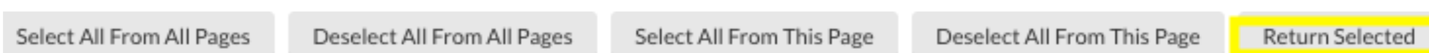
Using the "**Select?**" column, check off all those assets you wish to transfer.



You can cherry pick if you have more assets returned than you want to transfer, or if all of the ones you see need to be transferred, click on "**select all from all pages**."



Once your assets are selected, click on "return selected."

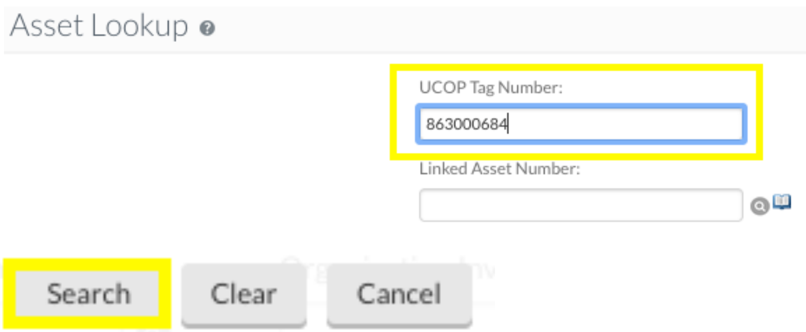


Because you used the **Look Up/Add Multiple Asset Lines** method, you do not need to "add" although now would be a good time to make sure the assets you want to transfer are listed. If everything is as it should be, skip to the section "**Finishing Your Transfer**" lower down in this doc.

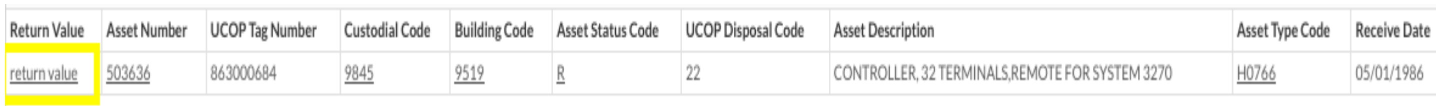
TRANSFERRING ONE ASSET

If you know the asset number you are transferring, type it in and then click Add. Otherwise, since KFS asset numbers are not how UCD tracks the equipment (we use the UCOP Tag number which used to be referred to as the asset number), you search for the asset number by clicking on the magnifying glass and dropping in the UCOP tag number where indicated and then clicking on search:

Using 863000684 as an example:



Next, click on *Return Value*. Note that the asset number is right next to the UCOP Tag number:

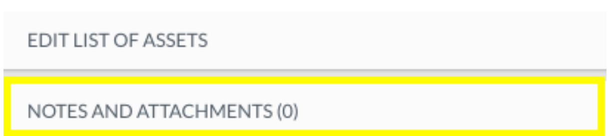


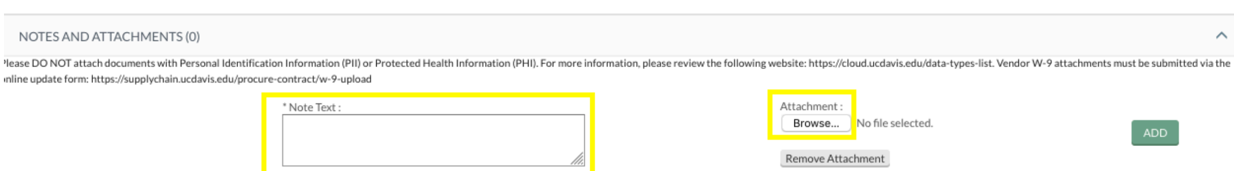
Return Value	Asset Number	UCOP Tag Number	Custodial Code	Building Code	Asset Status Code	UCOP Disposal Code	Asset Description	Asset Type Code	Receive Date
return value	503636	863000684	9845	9519	R	22	CONTROLLER, 32 TERMINALS,REMOTE FOR SYSTEM 3270	H0766	05/01/1986

Now click on Add.

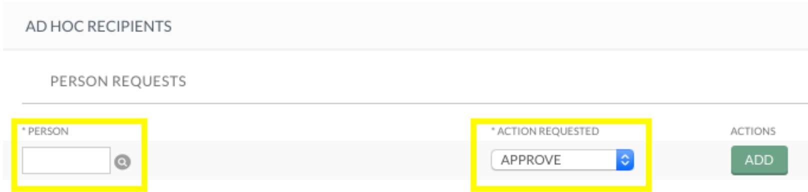
FINISHING YOUR TRANSFER

If you have notes or attachments you wish to add, 'show' the Notes and Attachments Tab and add them:





If you wish to ad-hoc route it to someone for *approval,* you must do so before you submit the document. Otherwise you may ad-hoc for FYI purposes both before or after submitting. If you don't know the person's user ID, use the magnifying glass to look them up. If you don't need to ad-hoc route it to anyone, just skip this step:



Click *Submit*. You're all done!