

Kuali@USC CAMS (Capital Asset Management System) Lookup and Maintenance User Guide

In the Kuali system, every transaction (such as a requested addition, change, or deletion) is created and submitted in the form of an electronic document, also referred to as an “eDoc.” The Kuali Financial System (KFS) includes two modules designed to enable users to create, maintain, and retire records related to both non-movable and movable capital assets:

- **Capital Asset Builder (CAB)** is the asset creation module used by the Equipment Management department to create asset database records for keeping track of movable capital assets. The CAB module is not discussed in this guide.
- The **Capital Asset Management (CAM)** module is used to track movable assets, both depreciable and non-depreciable, that have been purchased, transferred, received as gifts, or acquired in some other manner.

Together, these two modules constitute the **Capital Asset Management System (CAMS)** in KFS. However, it should be noted that the abbreviations *CAMS* and *CAM* are often used interchangeably at USC.

About this guide. This guide only offers instructions for working with the KFS CAM functions that are currently available for general use. It does not discuss the CAB system or USC eMarket. In addition, although the CAM module can be used to maintain records for large, non-movable capital assets, such as land and buildings, USC is not currently tracking such items in the Kuali system.

For brevity, this document does not cover introductory information, such as general descriptions of the Kuali on-screen interface or explanations of workflow routing. For that information, please see the separate document titled **Kuali Basics: Reference and Training Guide**, which can be accessed here: www.usc.edu/kuali/basicsguide

If you need assistance, please contact USC Kuali Customer Support by telephone at 213-740-5857 or send an email message to kuali@usc.edu.

CONTENTS:

About the Capital Asset Management Module	2
Basic CAMS Guidelines	2
Accessing CAMS Functions	5
Asset Lookup Form	5
Asset Location Global eDoc	8
Asset Payment Lookup Form	10
Asset Payment Depreciation Lookup Form	13
Asset Retirement Global eDoc	14
Asset Year End Book Value Calculator	17
Asset eDoc (Editing an Asset Record)	18
Equipment Loan/Return eDoc	21
Asset External Institution Maintenance	24
Asset Inquiry (Viewing Information About an Asset)	26
Saving an eDoc Before You Are Ready to Submit It	28
Resubmitting an eDoc Returned for Correction	29
Checking the Status of a Submitted eDoc	29
Logging Out of the Kuali System	29

About the Capital Asset Management Module

The KFS CAM module handles records for a variety of depreciable capital assets and non-depreciable, non-capital assets. CAM eDocs enable you to maintain and retire the records for these assets. The system is also designed to assist your school or department with other aspects of managing assets, such as monitoring inventory, depreciation, warranty, and repairs information. Additionally, the CAM module can be used to create or modify asset records from data collected in specific financial transaction eDocs in KFS, such as **Journal Vouchers (JVs)** and **Cashiering** (i.e., Cash Receipts, Credit Card Receipts, and Advance Deposits).

It should be noted that JV and Cashiering eDocs include a **Capital Edit** tab so that if one or more financial transactions detailed in the eDoc pertain to an existing or newly acquired capital asset, the user can update the existing record in the asset database or create a new asset record. (Financial debits or credits in Cashiering eDocs can be applied only to existing assets, whereas transactions detailed in JV eDocs can create new assets.) For general information about the Capital Edit tab, please refer to the **Kuali Basics: Reference and Training Guide**. For information about completing the Capital Edit tab in KFS Journal Voucher and Cashiering eDocs, please refer to the respective user guides for those Kuali modules.

Basic CAMS Guidelines

Terminology

- The following table shows several terms used in the Kuali system that correspond to older terms that were used in the university's legacy equipment inventory system (EQP):

Term Used in Legacy System (EQP)	Term Used in KFS
Equipment	Capital Asset
Group	Asset Type
Dispose (or Divest)	Retire
Acquisition Date	In Service Date
Program Code	Organization Code
Main/With Equipment	Parent/Child Assets

- For the purposes of CAMS records, the general rule is that “depreciable capital assets” are movable items that cost \$5,000 or more and have a minimum projected useful life of at least one year. There are some exceptions to this rule, usually arising from restrictions on the funds used for an item's purchase, or from equipment tracking requirements contained in the contract or grant associated with the purchase.

Some typical examples of depreciable capital assets are university vehicles, multi-user office equipment (e.g., computer printers), and medical and scientific research equipment. USC is not currently tracking buildings, land, and other large, non-movable capital assets through CAMS.

- Items classified as “non-depreciable, non-capital assets” would include art and museum objects; rare, out-of-print library books; antique furniture donated to the university; etc.
- Every capital asset is assigned an *Asset Type* code. Each Asset Type is defined to include an associated description, useful life, and other relevant data.

Asset Numbers and Tag Numbers

- In the university's legacy system, assets were assigned a unique Tag Number, which was utilized as the key identifier in the university's equipment database. In KFS, each asset is assigned both a Tag Number (carried over from the legacy system) and an Asset Number.
 - The *Tag Number* is generally the number of a physical tag affixed to the item. In those instances where the item itself is unable to accommodate a physical tag, the Tag Number begins with an "X" as a prefix.
 - The *Asset Number* is a system-generated unique identifier, which is assigned when the asset is created in the system. Once assigned, the Asset Number is permanent and cannot be reassigned or reused.
 - A given Tag Number can only be associated with one asset. By contrast, a single Asset Number may be assigned to an asset that consists of multiple components grouped together as a unit.
 - Under some circumstances, an existing asset may be assigned a new Tag Number (when there is a change in ownership; if the physical tag is worn out and must be replaced; etc.).
- In some instances, multiple assets may be associated in a parent-child relationship, where one or more "child" assets are subordinate to a "parent" asset. This relationship, which is established by Equipment Management personnel, is indicated in the CAMS records for the affected items, and is also represented in the Tag Numbers of the child assets:
 - Child assets do not have physical Tag Numbers. They are assigned virtual Tag Numbers in CAMS that consist of the parent asset's physical Tag Number followed by a decimal point and a one- to three-digit extension. (For example, if the parent asset's Tag Number is 123456, the Tag Numbers of the child assets will be 123456.1, 123456.2, etc.)
 - The Asset Numbers of child assets do not include any extensions.

CAMS Functions Currently Supported for General Use

The following CAMS functions listed under **Lookup and Maintenance > Capital Asset Management** on the **Financial Main Menu** in KFS are available for general use. However, note that each user's assigned user roles and account access privileges will determine which assets he or she can view and work with.

- **Asset** – opens a lookup form that enables you to search the CAMS system for asset records by entering identification, location, and ownership information as criteria; the displayed search results provide access to other functions and documents related to a particular asset (see **Asset Lookup Form** on page 5)
- **Asset Location Global** – opens an eDoc that you can submit to change location information for multiple assets simultaneously (see **Asset Location Global eDoc** on page 8)
- **Asset Payment** – opens a lookup form that enables you to search the system for asset records and payment information by entering payment-related criteria; the displayed search results provide access to other functions and documents specific to a particular asset (see **Asset Payment Lookup Form** on page 10)
- **Asset Payment Depreciation** – opens a lookup form that enables you to view the depreciation history of a particular asset (see **Asset Payment Depreciation Lookup Form** on page 13)
- **Asset Retirement Global** – opens an eDoc that you can submit to change the status of one or more capital assets to reflect that they are being retired, and to record financial transactions associated with the disposal of those assets (see **Asset Retirement Global eDoc** on page 14)

- **Asset Year End Book Value Calculator** – opens a lookup form that calculates a projected amount representing what an asset’s estimated value minus depreciation will be at the end of the current fiscal year (see **Asset Year End Book Value Calculator** on page 17)

Working With Search Results on Lookup Forms

Several of the CAMS functions are special lookup forms. The search results that match the criteria you have specified will appear in a table at the bottom of the lookup page.

- If you specify only a few search criteria, you will end up with a large number of lookup results. Filtering your search by specifying several criteria will enable you to more quickly locate the particular information you are seeking.
- Several of the search criteria fields on the lookup forms have an adjacent lookup  icon. You can click that icon to search for a specific code, account number, or other entity in the database to populate the field in question.
- When the table of search results appears at the bottom of the page, note that underlined entries in the cells of the table are hyperlinks that you can click to view related information.
- In the table of search results, note that underlined column headings can be clicked to change the order in which the rows of results are displayed. However, the original sorting order is used if you export the results, as explained in the next item in this list.
- The bottom of each lookup page includes *Export option* links below the search results table. These links enable you to save the search results in any of three file formats:
 - **CSV** – exports the search results to a .CSV (comma-separated values) file
 - **spreadsheet** – exports the search results to a .XLS (Excel worksheet) file
 - **XML** – exports the search results to a .XML (Extensible Markup Language) file

Actions That Can Be Taken on CAMS Asset Records

- When assets are displayed in the search results on the **Asset Lookup** and **Asset Payment Lookup** forms, they include hyperlinked “actions” that can be selected by authorized users. For any given asset, the actions displayed as active hyperlinks will vary according to the user’s access rights, user roles, and workgroup membership. The following table lists the actions that may be displayed:

Action	Description
edit	This action launches the Asset eDoc (discussed on page 18), which enables you to edit most of the information in the asset’s database record.
loan renew return	These actions launch the Equipment Loan/Return eDoc (discussed on page 21), on which you can enter information pertaining to the loan of an asset, the renewal of an existing loan, or the return of a previously loaned asset.
view	This action is available only for an asset that has been retired. Clicking the link will launch the read-only Asset Inquiry document (discussed on page 26), which presents all information on file for that asset in the asset database.
merge separate transfer payment	These actions are reserved for use by Equipment Management personnel. They are used, respectively, to update records in the asset database with information pertaining to the merging of assets, the separation of previously merged assets, the transfer of assets, or the manual entry of payment data.

- Usually, a CAMS user can take actions on any asset that was purchased using funds from at least one account for which that user has access rights.
- Organization Codes are also used to grant access to CAMS users. These codes can be assigned just like account numbers to grant user access. The system will allow a user to access all account numbers that fall under an assigned Organization Code.
- No actions other than **view** are available for any asset that has been retired.

Accessing CAMS Functions

Use this procedure to log in to KFS and access the CAMS functions.

1. Type www.usc.edu/kuali in the address field of your browser.
2. When the “Kuali at USC” page is displayed, click the Kuali Login button. The “USCnet Login” page will be displayed.
3. Log in, using your USC NetID user name and password. If you do not know your USC NetID or password, call ITS at 213-740-5555 (UPC) or 323-422-1968 (HSC).

The Financial Main Menu page of the Kuali screen will be displayed.

TIP: It is strongly recommended that you create a browser bookmark to the Financial Main Menu page for easy access to the Kuali system. When you later use that bookmark, you will be directed first to the “USCnet Login” page and then to the Financial Main Menu page once you have logged in.

4. On the Financial Main Menu page, the CAMS functions discussed in this guide are grouped under the **Capital Asset Management** heading in the **Lookup and Maintenance** section.

From this point, proceed to the section of this guide that discusses the CAMS function that you want to use. To locate the section you need, please refer to the **Table of Contents** on page 1, or to the list of **CAMS Functions Currently Supported for General Use** on page 3.

Asset Lookup Form

The **Asset Lookup** form enables you to search the CAMS system for existing asset records that meet the search criteria you have specified. The assets that match your criteria will be displayed in a search results table at the bottom of the page. Each row of the search results table represents a separate asset, and includes basic information, such as the Asset Number, Tag Number, Asset Description, Asset Type Code, Asset Status Code, Building Code, and Organization Code of the owner organization. Underlined entries in the search results table are active hyperlinks that you can click to view related details. For example, you can click the Asset Number of a listed asset to view the **Asset Inquiry** document, which presents all the information on file for that asset in the system. (See **Asset Inquiry (Viewing Information About an Asset)** on page 26 for more information.)

The first column in the search results table, labeled *Actions*, contains the actions that can be taken on the asset in each row. Some actions may not be available for particular assets, and only those actions for which you have the necessary permissions will be displayed as active hyperlinks.

To access the **Asset Lookup** form, click **Asset** under the **Capital Asset Management** heading in the **Lookup and Maintenance** section on the Financial Main Menu page. When the **Asset Lookup** form is displayed, complete any combination of the desired search criteria fields to filter your asset search, and click the  button to display results matching the criteria you specified.

- The use of wildcard characters is currently supported in all search criteria fields except for *Asset Number*, *Parent Asset Number*, and date fields or drop-down lists. You can therefore enter the first few digits of a tag number followed by an asterisk (*) in the *Tag Number* field to view search results that include all tag numbers beginning with those digits. Similarly, you can enter part of a number, name, or description in other search criteria fields (e.g., **computer** in the *Asset Description* field, *12** in the *Serial Number* field, etc.).
- Several of the search criteria fields have an adjacent lookup  icon. You can click that icon to search for a particular code, account number, or other entity in the database tables of valid entries for the field in question.
- If you want to utilize any of the date fields (*Create Date From/To* and *Retirement Date From/To*) as search criteria, note that you can click the adjacent calendar  icon to select the desired date from the pop-up calendar.

The following table lists all the search criteria fields available on the **Asset Lookup** form.

Field Name or Control	Description
Tag Number	A unique identification number issued by the university and physically affixed to the asset unless the asset cannot accommodate a tag. (Child assets do not have physical tag numbers. They are assigned virtual tag numbers, consisting of the parent asset’s physical tag number followed by a decimal point and a one- to three-digit extension.)
Asset Number	A system-generated unique identification number that is assigned when the asset is created in the system.
Parent Asset Number	When assets are associated in a parent-child relationship, this is the system-generated Asset Number assigned to the parent asset.
Organization Owner Chart of Accounts Code	The default value of SC in this field should not be changed. Click the lookup  icon to search for the desired code using the Chart Lookup form.
Organization Owner Organization Code	The Organization Code associated with the asset’s owner account. Click the lookup  icon to search for the desired code using the Organization Lookup form.
Organization Owner Account Number	The account number of the owner account responsible for the asset. Click the lookup  icon to search for the account number using the Account Lookup form.
Sponsored Agency	<i>This field is not currently used by USC.</i>
Campus	The code identifying the campus where the asset is physically located. Click the lookup  icon to search for the desired code using the Campus Lookup form.
Building Code	The code identifying the building where the asset is physically located. Click the lookup  icon to search for the desired code using the Building Lookup form.
Room Number	The room number of the room in the building where the asset is physically located. Click the lookup  icon to search for the desired number using the Room Lookup form.
Asset Type Code	A code that classifies types of assets into categories. Note that the anticipated life of an asset is based on its asset type. Click the lookup  icon to search for the desired code using the Asset Type Lookup form.

Field Name or Control	Description
Payment Sequence Number	A system-assigned number identifying the order in which payments were processed. Click the lookup  icon to search for the desired number using the Asset Payment Lookup form.
Payment Purchase Order Number	The number assigned to the Purchase Order for which the payment is posted. Click the lookup  icon to search for the desired number using the Asset Payment Lookup form.
Payment Document Number	The transaction document number that generated the capital expense. Click the lookup  icon to search for the desired number using the Asset Payment Lookup form.
Retirement Date From / To	Starting and ending date fields used to define the range of a time period during which the asset was retired in the asset database. Enter the desired date or click the adjacent calendar  icon to select a desired date from the pop-up calendar.

Asset Location Global eDoc

The **Asset Location Global** eDoc enables you to change location information (campus, building code, room, and sub-room) for multiple assets simultaneously. You can add assets to this eDoc one at a time or add multiple assets via the *Look Up/Add Multiple Asset Lines* search. When an asset is added to the eDoc, its location information is displayed on the screen, and the system displays an option to delete it from the document before submittal.

Changes that you make to an asset’s information in this eDoc will update the asset database when the eDoc is approved. (No changes can be made for an asset after it has been retired.) For Parent/Child assets, when you assign a new location to a parent, the records for its child assets will automatically be updated to reflect the new location.

To access and complete the **Asset Location Global** eDoc, proceed as follows:

1. Click **Asset Location Global** under the **Capital Asset Management** heading in the **Lookup and Maintenance** section on the Financial Main Menu page.

The **Asset Location Global** eDoc form will be displayed. This eDoc includes a basic set of standard tabs found in most eDocs, plus the **Edit List of Assets** tab. Fields marked with an asterisk (*) are required, and must be completed in order to submit the eDoc. In the upper right-hand area of the screen, the fields for document number, status, Initiator, and the creation date will be populated by the system.

2. In the *Description* field in the uppermost folder tab, labeled **Document Overview**, type a brief description (40 characters max.) of the asset location information you are submitting. (Below the *Description* field, the *Organization Document Number* field is not in use at this time.)

NOTE: The eDoc you are creating could appear in the results of a document search performed by any Kuali user. Do not include any sensitive information in the *Description* field because that description will be visible in the search results.

3. The *Explanation* text box is an optional field. If desired, use it to enter additional notes or a continuation of the information you have entered in the *Description* field.

4. If you only need to update information for one or a small number of assets, complete the **Edit List of Assets** tab as follows:
 - a. In the *New Asset Location* section of the tab, enter the *Asset Number* of an asset for which you want to edit the location information in the system. To search for the desired asset number, click the lookup  icon next to the *Asset Number* field, which will launch the **Asset Lookup** form described earlier in this guide (see page 5). Enter search criteria (such as the *Tag Number*) as needed on the **Asset Lookup** form to locate the desired asset. When the search results are displayed, click the *return value* link for the asset in question. The **Asset Location Global** eDoc will be displayed again, with the *Asset Number* field populated accordingly.
 - b. Click the  button. The page will be refreshed to show the *Asset Location* section displaying location and identification details for the asset you specified.
 - c. Make needed changes by editing the information shown in the *Campus*, *Building Code*, *Room Number*, and *Sub-Room Number* fields. Note that all of these fields are required except for *Sub-Room Number*.
 - d. If you realize that an asset you added to the eDoc should not be included, click the  button to remove it from the **Edit List of Assets** tab.
 - e. Repeat these steps as needed to add another asset for the purpose of editing its location information.
5. If you need to update information for multiple assets that share common attributes (such as having the same location, being included on the same purchase order, being parent/child assets with Asset Numbers that therefore all start with the same digits, etc.), complete the **Edit List of Assets** tab as follows:
 - a. Click the *Look Up/Add Multiple Asset Lines*  icon to launch the **Asset Lookup** form described earlier in this guide (see page 5).
 - b. Enter filtering criteria as needed so that the search results will include all the assets for which you want to modify the location information. The new location doesn't have to be the same for each asset; you can specify each asset's location information as needed.
 - c. Click the  button to display results matching the criteria you specified.
 - d. The search results will include a column of *Select?* check boxes. After checking the boxes for the desired assets, click the  button. (There are also alternative buttons that give you the option of selecting all entries on the current page of results or from all pages of results.) The **Asset Location Global** eDoc form will be displayed again, with the *Asset Location* section of the **Edit List of Assets** tab displaying location and identification details for the assets you selected.
 - e. For each asset, make any needed changes by editing the information in the *Campus*, *Building Code*, *Room Number*, and *Sub-Room Number* fields.
6. If you need to add any general comments or attachments to the eDoc, then complete the **Notes and Attachments** tab, as follows:
 - a. Click the  button on the **Notes and Attachments** tab to reveal the fields and controls used for adding comments and attaching related files.
 - b. Click the  button next to the *Attached File* field and navigate to the location of the file on your computer that you want to attach to this eDoc. The full path of the file that you have selected will appear in the *Attached File* field, but it is not yet attached.

If you want to change your selection to a different file, click the small button just below the *Attached File* field. When that field is empty again, click the button once more to locate the other file that you want to attach.

- c. Before attaching the file that you have selected, you must type the name of the file or a brief descriptive comment in the text box labeled *Note Text*. (This is a required field.)
 - d. To save the notes you entered and attach the file that you have selected, click the button located to the right of the *Attached File* field.
7. If you need to send a courtesy *FYI* notification to someone when submitting the eDoc, then complete the **Ad Hoc Recipients** tab as follows:
- a. Select *FYI* from the *Action Requested* drop-down list in the *Person Requests* section.
 - b. In the *Person* field, enter the User ID of the person to whom you want to route the eDoc. If you need to search for the User ID of the intended recipient, click the lookup icon  next to the *Person* field. When the **Person Lookup** page appears, enter search criteria as needed to locate the desired person. When the search results are displayed, click the *return value* link for your intended recipient. The **Asset Location Global** eDoc will be displayed again, with the *Person* field populated accordingly.
 - c. Click the button in the *Actions* column.
8. When you are ready to submit the eDoc, click the button.
- When the refreshed eDoc page appears, scroll to the top of the screen in order to view the status of your eDoc submission. The status message will state “Document successfully submitted” if there were no errors found in your eDoc. If the status message indicates that there were errors, such as missing information, take note of the problem and make the necessary changes or additions to the information you entered. After correcting your eDoc, click the button again, and then check the new status message to see if any further adjustments are needed.

If you later want to check on the status of an eDoc you have submitted, refer to the instructions presented in **Checking the Status of a Submitted eDoc** on page 29 of this guide.

Asset Payment Lookup Form

The **Asset Payment Lookup** form enables you to search the database for existing asset records and associated payment transactions by entering payment-related criteria. The assets and related payments that match your criteria will be displayed in a search results table at the bottom of the page. Each row of the results table represents a separate payment transaction that was processed for an asset matching the search criteria you specified, and includes payment-related information, such as the Account Number, Organization Code, Object Code, Amount, Posting Year, and Period Code. Underlined entries in the search results table are active hyperlinks that you can click to view related details.

The first column in the search results table, labeled *Actions*, contains the actions that can be taken on the asset in each row. Some actions may not be available for particular assets, and only those actions for which you have the necessary permissions will be displayed as active hyperlinks.

To access the **Asset Payment Lookup** form, click **Asset Payment** under the **Capital Asset Management** heading in the **Lookup and Maintenance** section on the Financial Main Menu page. When the **Asset Payment Lookup** form is displayed, complete any combination of the desired search criteria fields to filter your asset search, and click the button to display results matching the criteria you specified.

- The use of wildcard characters is currently supported in all search criteria fields except for *Asset Number* and date fields or drop-down lists. You can therefore enter the first few digits of a tag number followed by an asterisk (*) in the *Tag Number* field to view search results that include all tag numbers beginning with those digits. Similarly, you can enter part of a number, name, or description in other search criteria fields (e.g., **computer** in the *Asset Description* field, *20615** in the *Organization Code* field, etc.).
- Several of the search criteria fields have an adjacent lookup  icon. You can click that icon to search for a particular code, account number, or other entity in the database tables of valid entries for the field in question.
- If you want to utilize any of the date fields (*Posting Date From/To* and *In-Service Date From/To*) as search criteria, note that you can click the adjacent calendar  icon to select the desired date from the pop-up calendar.

The following table lists all the search criteria fields available on the **Asset Payment Lookup** form.

Field Name or Control	Description
Tag Number	A unique identification number issued by the university and physically affixed to the asset unless the asset cannot accommodate a tag. (Child assets do not have physical tag numbers. They are assigned virtual tag numbers, consisting of the parent asset’s physical tag number followed by a decimal point and a one- to three-digit extension.)
Asset Number	A system-generated unique identification number that is assigned when the asset is created in the system.
Purchase Order Number	The purchase order number associated with the purchase of the asset. For assets that were imported into CAMS from the legacy EQP system, this number will come from EQP data; going forward, it will come from the USC eMarket requisition associated with the asset’s purchase.
Requisition Number	The requisition number of the USC eMarket requisition associated with payments for the asset. For assets that were imported into CAMS from the legacy EQP system, this number will come from EQP data; going forward, it will come from the USC eMarket requisition associated with the asset’s purchase.
Document Type	The type of eDoc that generated the capital expense associated with an asset payment. Click the lookup  icon to search for the desired code using the Document Type Lookup form. For assets that were imported into CAMS from the legacy EQP system, the document type will be <i>EQP</i> .
Document Number	The Document Number identifying the eDoc that generated the capital expense associated with an asset payment. For assets that were imported into CAMS from the legacy EQP system, the document number will have an <i>EQP-</i> prefix.
Chart Code	The chart code for the owner account that is responsible for an asset payment. By default, this is always SC .
Organization Code	The Organization Code associated with the account that is responsible for an asset payment. Click the lookup  icon to search for the desired code using the Organization Lookup form.
Account Number	The account that is responsible for an asset payment. Click the lookup  icon to search for the desired account using the Account Lookup form.

Field Name or Control	Description
Sub-Account	If applicable, the account number of the sub-account responsible for an asset payment. Click the lookup  icon to search for the desired code using the Sub-Account Lookup form.
Object Code	Used to classify the transaction and to identify asset categories and the type of funding. Click the lookup  icon to search for the desired code using the Object Code Lookup form.
Sub-Object	<i>This field is not currently used by USC.</i>
Project Code	<i>This field is not currently used by USC.</i>
Organization Reference ID	<i>This field is not currently used by USC.</i>
Fiscal Year	The fiscal year in which an asset payment was posted to the General Ledger. Click the lookup  icon to search for the desired year using the System Options Lookup form.
Fiscal Period	The accounting period during which an asset payment was posted to the General Ledger. Click the lookup  icon to search for the desired period code using the Accounting Period Lookup form.
Posting Date From / To	Starting and ending date fields used to define the range of a time period during which an asset payment was posted to the General Ledger. Enter the desired date or click the adjacent calendar  icon to select a date from the pop-up calendar.
In-Service Date From / To	Starting and ending date fields used to define the range of a time period during which the asset was first placed in service and became eligible for depreciation. Enter the desired date or click the adjacent calendar  icon to select a date from the pop-up calendar.
Amount	The portion of the cost of the asset paid by a specific account for a given payment. This field supports the use of the following special characters that enable you to search for comparative amounts: > (greater than) >= (greater than or equal to) < (less than) <= (less than or equal to)
Total Cost	The recorded total cost of the asset. This field supports the following special characters that enable you to search for comparative amounts: > (greater than) >= (greater than or equal to) < (less than) <= (less than or equal to)
Campus	The code identifying the campus where the asset is physically located. Click the lookup  icon to search for the desired code using the Campus Lookup form.
Building Code	The code identifying the building where the asset is physically located. Click the lookup  icon to search for the desired code using the Building Lookup form.
Asset Status Code	A code indicating the current status of the asset. Click the lookup  icon to search for the desired code using the Asset Status Lookup form.
Asset Type Code	A code that classifies types of assets into categories. Note that the anticipated life of an asset is based on its asset type. Click the lookup  icon to search for the desired code using the Asset Type Lookup form.

Field Name or Control	Description
Plant Account Number	<i>This field is not currently used by USC.</i>
Campus Plant Account Number	<i>This field is not currently used by USC.</i>
Sub-Fund Group Code	A code representing the fund group that identifies the fund source and use restrictions associated with the account responsible for an asset payment. Click the lookup  icon to search for the desired code using the Sub-Fund Group Lookup form.
Object Sub-Type Code	A category code that is used to determine the depreciation convention that applies to the asset. Click the lookup  icon to search for the desired code using the Object Sub-Type Lookup form.
Asset Description	Free-form text that describes the asset.
Secondary Organization Code	Intended specifically for “69” accounts that are under construction, this data field is used to identify the school, department, or organization for which the asset is being created.

Asset Payment Depreciation Lookup Form

In CAMS, depreciation is an annual process at the end of each fiscal year that calculates depreciation expense entries for items in the asset database, sends them to the General Ledger, and adjusts the affected asset records. (Assets that have been fully depreciated will remain active in the system until they are retired.) The **Asset Payment Depreciation Lookup** form enables you to view the depreciation history of a particular asset. You can locate the desired asset record by specifying either a Tag Number or an Asset Number. The search results are displayed at the bottom of the page, in a table that includes depreciation-related information. Underlined entries in the search results table are active hyperlinks that you can click to view related details. (The search results table for this lookup form does not include an *Actions* column. It is a display-only lookup form.)

To access the **Asset Payment Depreciation Lookup** form, click **Asset Payment Depreciation** under the **Capital Asset Management** heading in the **Lookup and Maintenance** section on the Financial Main Menu page. When the **Asset Payment Depreciation Lookup** form is displayed, you can complete either the *Tag Number* or *Asset Number* field to search for the desired asset record. Click the  button to display results matching the criteria you specified.

- The *Tag Number* field supports the use of wildcard characters. You can therefore enter the first few digits of a tag number followed by an asterisk (*) to view search results that include all tag numbers beginning with those digits.
- You can click the lookup  icon adjacent to the *Asset Number* field if you want to launch the **Asset Lookup** form described earlier in this guide (see page 5).

Asset Retirement Global eDoc

This document enables you to change the status of capital assets to reflect that they are being retired, and to record financial transactions associated with the disposal of those assets. Note that once an asset has been retired, the action cannot be reversed through the Kuali system. A request would have to be submitted to the Equipment Management Department, asking for the asset in question to be recreated manually in the system.

- As a general rule, the **Asset Retirement Global** eDoc is used for the divesting of capital equipment from an organization's inventory. Non-capital assets cannot be retired using this eDoc.
- This eDoc replaces the previous process of submitting a paper *Equipment Management Inventory Adjustment Form* to report the disposition or divestiture of equipment.
- Upon submittal, **Asset Retirement Global** eDocs are automatically routed first to the fiscal officer of the account used for the last payment associated with the asset. Additional workflow routing is determined in part by the reason specified for the retirement of the asset.

To access and complete the **Asset Retirement Global** eDoc, proceed as follows:

1. Click **Asset Retirement Global** under the **Capital Asset Management** heading in the **Lookup and Maintenance** section on the Financial Main Menu page.
2. The **Asset Retirement Reason Lookup** form will be displayed so that you can select the applicable asset retirement reason code. (The *Merged* retirement reason code is only available to Equipment Management personnel.)

NOTE: Because USC has only a small set of "active" retirement reasons, there is no need to filter the list of retirement reason codes by specifying search criteria. You can simply click the button without changing any of the default settings in this lookup form.

3. When the list of active retirement reason codes is displayed at the bottom of the form, click the *return value* link for the reason that is appropriate for the asset being retired.

The **Asset Retirement Global** eDoc form will be displayed. This eDoc includes a basic set of the standard tabs found in most eDocs, plus special tabs pertaining to asset retirement. The specific tabs displayed on the eDoc will vary depending on the retirement reason that you selected. Fields marked with an asterisk (*) are required, and must be completed in order to submit the eDoc. In the upper right-hand area of the screen, the fields for document number, status, Initiator, and the creation date will be populated by the system.

4. In the *Description* field in the uppermost folder tab, labeled **Document Overview**, type a brief description (40 characters max.) of the asset retirement information you are submitting. (Below the *Description* field, the *Organization Document Number* field is not in use at this time.)

NOTE: The eDoc you are creating could appear in the results of a document search performed by any Kuali user. Do not include any sensitive information in the *Description* field because that description will be visible in the search results.

5. The *Explanation* text box is an optional field. If desired, enter additional notes or a continuation of the information you have entered in the *Description* field.
6. The **Retirement Information** tab appears on the eDoc for all retirement reason codes. No action is required; the tab will be populated automatically to reflect the retirement reason that you specified in step 2.

7. If you selected a retirement reason code denoting that the asset has been sold or traded in, then the **Sold or Trade in** tab will be displayed. Complete this tab by entering the details related to the sale or trade-in of the asset:
 - a. *Buyer Description* is a required field; enter the name of the person or entity to which the asset was sold or traded.
 - b. *Sale/Trade-in Price* is a required field; enter the selling price or trade-in amount.
 - c. If applicable, complete the *Handling Fee Amount* field by entering the amount of any charge levied for readying the asset for disposition.
 - d. If applicable, complete the *Preventive Maintenance Amount* field by entering the amount of any charge levied to track the cost of preventive maintenance associated with disposition of the asset.
 - e. If applicable, complete the *Cash Receipt Financial Document Number* field by entering the number of the cash or credit card receipt created to record the transaction.
 - f. If applicable, complete the *Cash Receipt Chart of Accounts Code* field by entering the chart code used to record the proceeds from the transaction. (Click the lookup  icon if you want to search for the desired code using the **Chart Lookup** form.)
 - g. If applicable, complete the *Cash Receipt Account Number* field by entering the account number used to record the proceeds from the transaction. (Click the lookup  icon if you want to search for the desired code using the **Account Lookup** form.)
8. If you selected the *Theft* retirement reason code, then the **Theft** tab will be displayed. Complete the *Police Case Number* field by entering the case number related to the theft of the asset.
9. If you selected the *External Transfer* retirement reason code, then the **External Transfer or Gift** tab will be displayed. Complete this tab by entering the details of the transfer:
 - a. *Contact Name* is a required field; enter the name of the recipient of the asset.
 - b. *Institution Name* is a required field; enter the name of the entity that has taken ownership of the asset.
 - c. If applicable, complete the remaining fields by entering the address details and telephone number of the entity that has taken ownership of the asset. (You can click the lookup  icon next to the state, postal code, and country code fields to search for the desired code.)
10. If you selected the *Merged* retirement reason code, then the **Target Asset Information** tab will be displayed. Complete this tab by entering details about the target asset into which the retired asset is being combined:
 - a. In the *Merged Target Asset Number* field, enter the asset number of the “surviving” asset (i.e., the one that will remain after “absorbing” the asset whose number is being retired).
 - b. In the *Asset Description* text box, enter a description of the target asset, which now includes the original asset and the retired asset that has been merged into it.
 - c. No action is required on this tab’s other fields, which present display-only information.
11. The **Asset Detail Information** tab appears on the eDoc for all retirement reason codes. Use the following instructions to complete this tab.
 - If only one or a small number of assets are being merged into the target asset you specified in the preceding step, proceed as follows:
 - a. In the *Asset Number* field of the *New Asset Retired* section, enter the asset number for the asset being retired. If you want to search for the asset number, click the lookup 

icon next to the *Asset Number* field, which will launch the **Asset Lookup** form described earlier in this guide (see page 5).

- b. Click the button located just beneath the *Asset Number* field. The eDoc page will be refreshed, and details about the asset number you added will now be displayed beneath the *New Asset Retired* section.
 - c. Review the details displayed for the asset number you added, in order to confirm that the correct asset has been identified. (If you find that you specified an incorrect asset number, you can click the button beneath the asset details to remove it from the **Asset Detail Information** tab.)
 - d. Repeat these steps as needed to add another asset to the list of those being merged into the target asset.
- If you need to specify multiple assets that are being merged into the target asset you specified above, proceed as follows:
- a. Click the *Look Up/Add Multiple Asset Lines*  icon to launch the **Asset Lookup** form described earlier in this guide (see page 5).
 - b. Enter filtering criteria as needed so that the search results will include all the assets that are being merged into the target asset.
 - c. Click the button to display results matching the criteria you specified.
 - d. The search results will include a column of *Select?* check boxes. After checking the boxes for the desired assets, click the button. (There are also alternative buttons that give you the option of selecting all entries on the current page of results or from all pages of results.) The **Asset Retirement Global** eDoc form will be displayed again, with the *New Asset Retired* section of the **Asset Detail Information** tab displaying details for the assets you selected.
 - e. Review the details displayed for the assets you added, in order to confirm that all of those listed are correct. (If you find that an incorrect asset number was included, click the button beneath that asset's details to remove it from the **Asset Detail Information** tab.)
12. The **General Ledger Pending Entries** tab appears on the eDoc for all retirement reason codes. No action is required on this tab, which presents display-only information about any pending General Ledger entries arising from financial transaction eDocs that pertain to an asset in this eDoc.
13. If you need to add any general comments or attachments to the eDoc, then complete the **Notes and Attachments** tab, as follows:
- a. Click the button on the **Notes and Attachments** tab to reveal the fields and controls used for adding comments and attaching related files.
 - b. Type your comments in the text box labeled *Note Text*. If you are just attaching a file, you must enter the file name or a brief comment in the text box. (This is a required field.)
 - c. To add an attachment, click the button next to the *Attached File* field and navigate to the location of the file on your computer that you want to attach. The full path of the file that you have selected will appear in the *Attached File* field, but it is not yet attached. If you want to change your selection to a different file, click the small button just below the *Attached File* field. When that field is empty again, click the button once more to locate the other file that you want to attach.
 - d. To save the notes you entered and attach the file that you have selected, click the button located to the right of the *Attached File* field.

14. If you need to send a courtesy *FYI* notification to someone when submitting the eDoc, then complete the **Ad Hoc Recipients** tab, as follows:
- Select *FYI* from the *Action Requested* drop-down list in the *Person Requests* section.
 - In the *Person* field, enter the User ID of the person to whom you want to route the eDoc. If you need to search for the User ID of the intended recipient, click the lookup icon  next to the *Person* field. When the **Person Lookup** page appears, enter search criteria as needed to locate the desired person. When the search results are displayed, click the *return value* link for your intended recipient. The **Asset Location Global** eDoc will be displayed again, with the *Person* field populated accordingly.
 - Click the button in the *Actions* column.
15. If all other sections of the eDoc have been completed and you are ready to submit the eDoc, click the button.
- When the refreshed eDoc page appears, scroll to the top of the screen in order to view the status of your eDoc submission. The status message will state “Document successfully submitted” if there were no errors found in your eDoc. If the status message indicates that there were errors, such as missing information, take note of the problem and make the necessary changes or additions to the information you entered. After correcting your eDoc, click the button again, and then check the new status message to see if any further adjustments are needed.

If you later want to check on the status of an eDoc you have submitted, refer to the instructions presented in **Checking the Status of a Submitted eDoc** on page 29 of this guide.

Asset Year End Book Value Calculator

The **Asset Year End Book Value Calculator** is a lookup form designed to calculate a projected amount representing what an asset’s estimated book value minus depreciation will be at the end of the current fiscal year. In calculating this estimate, the system considers only payments and depreciation expenses that have already been applied. Consequently, the estimated year-end value will change if additional payments or depreciation expenses are applied against the asset before the end of the fiscal year.

The search results are displayed at the bottom of the page, in a table that lists the Tag Number, Asset Number, Asset Description, and estimated Year-End Book Value for each asset in the result set. (The search results table for this lookup form does not include an *Actions* column.)

To access this lookup form, click **Asset Year End Book Value Calculator** under the **Capital Asset Management** heading in the **Lookup and Maintenance** section on the Financial Main Menu page. When the **Asset Year End Book Value Calculator** form is displayed, complete the desired search criteria fields to filter your asset search. You must complete at least one search criteria field.

- If you want to search for an asset by its Asset Number or Tag Number, you must enter all the digits because those fields on this lookup form do not support the use of wildcard characters.
- If you want to search for an asset by its location, note that the *Campus*, *Building Code*, and *Room Number* search criteria fields can only be used if ALL of them are completed.
- You can click the lookup  icon adjacent to the *Asset Number* field if you want to launch the **Asset Lookup** form described earlier in this guide (see page 5).
- The *Organization Code*, *Campus*, *Building Code*, and *Room Number* search criteria fields each have their own adjacent lookup  icon so that you can search the database for the desired data.

Asset eDoc (Editing an Asset Record)

When you select the **edit** action for an entry in the search results table for the **Asset Lookup** or **Asset Payment Lookup** form, the system will present the **Asset eDoc**. This document enables authorized users to make changes to the information on file for a particular asset in the database, and also to add new information to the asset's repair history and list of components. The **Asset eDoc** can be used to edit CAMS record data for both capital assets and non-capital assets.

In addition to the standard **Document Overview**, **Notes and Attachments**, **Ad Hoc Recipients**, and **Route Log** tabs, the **Asset eDoc** includes the following special tabs. Instructions for completing these tabs are presented next in this section. Fields marked with an asterisk (*) are required, and must be completed in order to submit the eDoc. In the upper right-hand area of the screen, the fields for document number, status, Initiator, and the creation date will be populated by the system.

- Asset Detail Information
- Asset Location
- Organization Information
- Payments
- Payments Summary
- Payments Lookup
- Land Information
- Asset Depreciation Information
- View Asset Separate History
- Warranty
- Repair History
- Components
- Lookup Related Capital Asset Documents
- View Purchasing/Financial Asset Documents

NOTE: Each user's assigned user roles and access privileges will determine which tabs he or she will see and be able to edit in the **Asset eDoc**.

To complete the **Asset eDoc**, proceed as follows:

1. In the *Description* field in the uppermost folder tab, labeled **Document Overview**, type a brief description (40 characters max.) of the asset information changes you are submitting. (Below the *Description* field, the *Organization Document Number* field is not in use at this time.)

NOTE: The eDoc you are creating could appear in the results of a document search performed by any Kuali user. Do not include any sensitive information in the *Description* field because that description will be visible in the search results.

2. The *Explanation* text box is an optional field. If desired, use it to enter additional notes or a continuation of the information you have entered in the *Description* field.
3. The **Asset Detail Information** tab consists of two sections: The **Old** section presents a read-only display of detailed identification information currently included in the asset's database record; the **New** section presents fields that can be used by Equipment Management personnel to update the information for that asset. (You can find descriptions for most of the fields on this tab in the table that lists the fields on the **Asset Lookup** form, which begins on page 5.)
4. The **Asset Location** tab consists of two sections: The **Old** section presents a read-only display of the location data currently included in the asset's database record; the **New** section presents editable fields that can be used to update that information. The *Campus* field is always required; the *Asset Type* and *Asset Status* codes determine which other information is required. There are separate sections for the entry of on-campus and off-campus location information. If you are entering information in the *Off Campus* section, note that you must also complete the *Campus* field in the *On Campus* section by entering **OTH** ("Other").

Also note that whenever a change is made on this tab, the **Asset Detail Information** tab will be updated as follows: The *Last Updated Date* field will change to show the current date, and the *Last Updated By* field will be updated to show who performed the update.

5. The **Organization Information** tab consists of two sections: The **Old** section presents a read-only display of the organization information currently included in the asset's database record; the **New** section presents editable fields that can be used to update that information. (You can find descriptions for several fields on this tab in the table that lists the fields on the **Asset Lookup** form, which begins on page 6.)
6. The **Payments** tab will display details for up to 10 payments associated with the asset whose information you are editing. Underlined items in the payment details are hyperlinks that you can click to view associated information. If more than 10 payments are on file in the system, this tab will be renamed **Payments Summary** and it will display only a *Payments Total* amount. You can view all the payments on file in the system by using the **Asset Payment Lookup** form, which can be accessed from the **Payments Lookup** tab discussed in the next step.

NOTE: When displaying payment details, the **Payments** tab may be divided into **Old** and **New** sections; however, all information shown in the tab is read-only.

7. The **Payments Lookup** tab merely contains a link that provides a convenient way to launch the **Asset Payment Lookup** form (discussed earlier in this guide; see page 10), automatically populated with results for the asset whose information you are editing.
8. The **Land Information** tab is not currently used by USC. Its purpose is to display information about any land related to the asset whose information you are editing. The **Old** section of the tab is a read-only display of information currently included in the asset's database record; the **New** section offers editable fields to update that information.
9. The **Asset Depreciation Information** tab consists of two sections: The **Old** section presents a read-only display of the depreciation information currently included in the asset's database record; the **New** section presents fields that can be updated by Equipment Management personnel, as well as links that provide a convenient way to launch the **Asset Payment Depreciation Lookup** form (discussed earlier; see page 13) and the **Asset Year End Book Value Calculator** form (discussed earlier; see page 17).
10. The **View Asset Separate History** tab is shown only if the asset whose information you are editing was previously part of another asset. This tab displays the "Original Asset Number" for the asset from which this asset was removed, and the date on which the separation occurred. Note that although the tab is divided into **Old** and **New** sections, all displayed information is read-only.
11. The **Warranty** tab consists of two sections: The **Old** section presents a read-only display of the warranty data currently included in the database record of the asset whose information you are editing; the **New** section presents editable fields that can be used to update that information.
12. The **Repair History** tab presents any repair history that has been entered in the asset's database record, and enables you to add new repair information. Note that you must click the button for each repair incident that you want to include in the asset's repair history.
When completing the date fields, note that you can click the adjacent calendar  icon to select the desired date from the pop-up calendar.
13. The **Components** tab presents a list of any component units that have been entered in the asset's database record, and also enables you to add new or previously unspecified components. Note

that you must click the button for each component that you want to include in the asset's record.

14. The **Lookup Related Capital Asset Documents** tab merely presents links that offer a convenient way to view other Kuali eDocs pertaining to the asset for which you are editing database information. The following links may be included:

- **Asset Edit** – Click this link to view any other **Asset** eDocs that were submitted to edit information in the database record for the same asset.
- **Asset Construction in Progress (CIP)** – (*Pertains to an eDoc not currently used by USC.*)
- **Asset Global Create or Separate** – Click this link to view the **Asset Global** eDoc that was used by the Equipment Management department to create a database record for the asset, or to separate the asset from another asset with which it was previously combined.
- **Asset Payments** – Click this link to view any **Asset Payments** eDocs that have been submitted by Equipment Management personnel to enter payment information manually for this asset.
- **Asset Transfer** – (*Pertains to an eDoc not currently used by USC.*)
- **Equipment Loan or Return** – Click this link to view any **Equipment Loan/Return** eDocs (discussed later in this guide; see page 21) that pertain to this asset.
- **Asset Location Global** – Click this link to view any **Asset Location Global** eDocs (discussed earlier in this guide; see page 8) that pertain to this asset.
- **Asset Retirement Global** – Click this link to view any **Asset Retirement Global** eDocs (discussed earlier; see page 14) that pertain to this asset.
- **Asset Maintenance, Fabrication, Location, Create, Separate, Retirement** – Click this link if you want to view *all* CAMS eDocs, of any type, pertaining to this asset.

15. The **View Purchasing/Financial Asset Documents** tab will display any Payment Request (PREQ) or financial transaction document currently pending against the asset in the **Capital Asset Builder** system. Because such documents are only displayed (a) while they are being processed and (b) if they will modify the asset data, this tab will usually be empty.

16. If you need to add any general comments or attachments to the eDoc, then complete the **Notes and Attachments** tab, as follows:

- a. Click the button on the **Notes and Attachments** tab to reveal the fields and controls used for adding comments and attaching related files.
- b. Type your comments in the text box labeled *Note Text*. If you are just attaching a file, you must enter the file name or a brief comment in the text box. (This is a required field.)
- c. To add an attachment, click the button next to the *Attached File* field and navigate to the location of the file on your computer that you want to attach to this eDoc. The full path of the file that you have selected will appear in the *Attached File* field, but it is not yet attached.

If you want to change your selection to a different file, click the small button just below the *Attached File* field. When that field is empty again, click the button once more to locate the other file that you want to attach.

- d. To save the notes you entered and attach the file that you have selected, click the button located to the right of the *Attached File* field.

17. If you need to send a courtesy *FYI* notification to someone when submitting the eDoc, then complete the **Ad Hoc Recipients** tab as follows:
- Select *FYI* from the *Action Requested* drop-down list in the *Person Requests* section.
 - In the *Person* field, enter the User ID of the person to whom you want to route the eDoc. If you need to search for the User ID of the intended recipient, click the lookup icon  next to the *Person* field. When the **Person Lookup** page appears, enter search criteria as needed to locate the desired person. When the search results are displayed, click the *Return Value* link for your intended recipient. The **Asset Location Global** eDoc will be displayed again, with the *Person* field populated accordingly.
 - Click the button in the *Actions* column.
18. When you are ready to submit the eDoc, click the button.

When the refreshed eDoc page appears, scroll to the top of the screen in order to view the status of your eDoc submission. The status message will state “Document successfully submitted” if there were no errors found in your eDoc. If the status message indicates that there were errors, such as missing information, take note of the problem and make the necessary changes or additions to the information you entered. After correcting your eDoc, click the button again, and then check the new status message to see if any further adjustments are needed.

If you later want to check on the status of an eDoc you have submitted, refer to the instructions presented in **Checking the Status of a Submitted eDoc** on page 29 of this guide.

Equipment Loan/Return eDoc

When you select the **loan**, **renew**, or **return** action for an entry in the search results table on the **Asset Lookup** or **Asset Payment Lookup** form, the system will display the **Equipment Loan/Return** eDoc. This eDoc, which replaces the *Property Loan Agreement for Temporary Transfer of USC/Government/Sponsor-Owned Equipment*, enables authorized users to update the asset database regarding the loan of a capital or non-capital asset to an external (i.e., non-USC) entity.

Depending on whether you have selected the **loan**, **renew**, or **return** action hyperlink, the eDoc form facilitates the entry of information pertaining to, respectively, the establishment of a new loan, the renewal of an existing loan, or the return of the loaned asset. Upon submittal, the document will be routed to the fiscal officer for the account specified in the **Asset** tab of this eDoc.

In addition to the standard **Document Overview**, **Notes and Attachments**, **Ad Hoc Recipients**, and **Route Log** tabs, the **Equipment Loan/Return** eDoc includes the following tabs. Instructions for completing these tabs are presented next in this section. Fields marked with an asterisk (*) are required, and must be completed in order to submit the eDoc. In the upper right-hand area of the screen, the fields for document number, status, Initiator, and the creation date will be populated by the system.

- Asset
- Equipment Loans
- Borrower’s Address
- Asset Location
- Organization
- Processed Payments
- Payments Lookup

NOTE: Each user’s assigned user roles and access privileges will determine which tabs he or she will see and be able to edit in the **Equipment Loan/Return** eDoc.

To complete the **Equipment Loan/Return** eDoc, proceed as follows:

1. In the *Description* field in the uppermost folder tab, labeled **Document Overview**, type a brief description (40 characters max.) of the asset information changes you are submitting. (Below the *Description* field, the *Organization Document Number* field is not in use at this time.)

NOTE: The eDoc you are creating could appear in the results of a document search performed by any Kuali user. Do not include any sensitive information in the *Description* field because that description will be visible in the search results.

2. The *Explanation* text box is an optional field. If desired, use it to enter additional notes or a continuation of the information you have entered in the *Description* field.
3. The **Asset** tab presents a read-only display of detailed identification information currently included in the asset's database record. (You can find descriptions for most of the fields on this tab in the table that lists the fields on the **Asset Lookup** form, which begins on page 5.)
4. The **Equipment Loans** tab collects information that identifies the borrower and specifies the starting date for the asset loan, as well as the date on which it is anticipated that the loaned asset will be returned.

If you are submitting the **Equipment Loan/Return** eDoc for a new equipment loan, be sure to complete all applicable fields:

- The *External Institution ID* field is used to identify the external entity to which the asset is being loaned. You can click the adjacent lookup  icon to search for the desired ID code using the **Asset External Institution Maintenance Lookup** form. (For information about this lookup form, please see page 24.) When the search results are displayed at the bottom of the page, click the *return value* link for the desired ID code. The **Equipment Loan/Return** eDoc will be displayed again, with the *External Institution ID* field populated accordingly.

Note that if the external entity that will be borrowing the asset does not already have an existing ID code in the CAMS database, then before proceeding, you will need to create a record for that entity by submitting an **Asset External Institution Maintenance** eDoc. You can do this by clicking the button in the upper right-hand corner of the **Asset External Institution Maintenance Lookup** form. (You can find instructions for completing the **Asset External Institution Maintenance** eDoc on page 24.)

- The *Loan Date* and *Expected Return Date* fields are required. The *Loan Date* field will be populated with the current date by default, but you can edit it to specify a different start date, if applicable.

If you are completing the **Equipment Loan/Return** eDoc for the renewal of an existing loan or the return of a loaned asset, the fields on the **Equipment Loans** tab are pre-populated, but some of them can be edited:

- For a loan renewal, you must enter a new *Expected Return Date*.
- For the return of a loaned asset, you must complete the *Loan Return Date* field, which is displayed only if you selected the **return** action for the asset.

5. The **Borrower's Address** tab consists of two sections: The **Borrower** section of this tab collects the borrower's mailing address and telephone number, and the **Stored At** section collects the same information for the physical location where the asset will be situated.

All fields in the **Borrower** section are required. They will be populated automatically using information on file in the database if you have entered a valid ID code in the *External Institution*

ID field on the **Equipment Loans** tab (discussed above). Be sure to also complete the fields in the **Stored At** section, if applicable.

6. The **Asset Location** tab presents a read-only display of the location information currently included in the asset's database record.
7. The **Organization** tab presents a read-only display of the organization information currently included in the asset's database record. (You can find descriptions for several fields on this tab in the table that lists the fields on the **Asset Lookup** form, which begins on page 6.)
8. The **Processed Payments** tab will display details for up to 10 payments associated with the asset. If more than 10 payments are on file in the system, this tab will display only a *Payments Total* amount. You can view all the payments on file in the system by using the **Asset Payment Lookup** form, which can be accessed from the **Payments Lookup** tab (discussed in the next step).
9. The **Payments Lookup** tab merely contains a link that offers a convenient way to launch the **Asset Payment Lookup** form (discussed earlier in this guide; see page 10), automatically populated with results for the asset.
10. If you need to add any general comments or attachments to the eDoc, then complete the **Notes and Attachments** tab, as follows:
 - a. Click the  button on the **Notes and Attachments** tab to reveal the fields and controls used for adding comments and attaching related files.
 - b. Type your comments in the text box labeled *Note Text*. If you are just attaching a file, you must enter the file name or a brief comment in the text box. (This is a required field.)
 - c. To add an attachment, click the  button next to the *Attached File* field and navigate to the location of the file on your computer that you want to attach to this eDoc. The full path of the file that you have selected will appear in the *Attached File* field, but it is not yet attached.

If you want to change your selection to a different file, click the small  button just below the *Attached File* field. When that field is empty again, click the  button once more to locate the other file that you want to attach.
 - d. To save the notes you entered and attach the file that you have selected, click the  button located to the right of the *Attached File* field.
11. If you need to send a courtesy *FYI* notification to someone when submitting the eDoc, complete the **Ad Hoc Recipients** tab as follows:
 - a. Select *FYI* from the *Action Requested* drop-down list in the *Person Requests* section.
 - b. In the *Person* field, enter the User ID of the person to whom you want to route the eDoc. If you need to search for the User ID of the intended recipient, click the lookup icon  next to the *Person* field. When the **Person Lookup** page appears, enter search criteria as needed to locate the desired person. When the search results are displayed, click the *Return Value* link for your intended recipient. The **Asset Location Global** eDoc will be displayed again, with the *Person* field populated accordingly.
 - c. Click the  button in the *Actions* column.
12. When you are ready to submit the eDoc, click the  button.

When the refreshed eDoc page appears, scroll to the top of the screen in order to view the status of your eDoc submission. The status message will state "Document successfully submitted" if

there were no errors found in your eDoc. If the status message indicates that there were errors, such as missing information, take note of the problem and make the necessary changes or additions to the information you entered. After correcting your eDoc, click the button again, and then check the new status message to see if any further adjustments are needed.

If you later want to check on the status of an eDoc you have submitted, refer to the instructions presented in *Checking the Status of a Submitted eDoc* on page 29 of this guide.

Asset External Institution Maintenance

If you are preparing to complete an **Equipment Loan/Return** eDoc (discussed on page 21) for the loan of a piece of equipment to an external institution or other entity, you will need to enter the ID code for that external entity on the **Equipment Loans** tab of the eDoc. If you do not know the external entity ID code, you can search for it using the **Asset External Institution Maintenance Lookup** form, which is discussed first in this section of the guide. If the external entity does not already have an existing ID code in the CAMS database, you will need to create a record for that entity by submitting an **Asset External Institution Maintenance** eDoc, which is discussed later in this same section.

Asset External Institution Maintenance Lookup Form

This lookup form enables you to search for the External Institution ID code of an external entity that has an existing record in the CAMS database. You can access the **Asset External Institution Maintenance Lookup** form in two ways:

- To launch the **Asset External Institution Maintenance Lookup** form by itself directly in the Kuali system, select the **Financial Maintenance** tab at the top of the Kuali screen, and then click **Asset External Institution** in the **Capital Asset Management** section of the Financial Maintenance page. When the **Asset External Institution Maintenance Lookup** form is displayed, complete the desired combination of search criteria fields to filter your search, and click the button to display results matching the criteria you specified.
- If you are in the process of completing an **Equipment Loan/Return** eDoc, click the lookup  icon next to the *External Institution ID* field on the **Equipment Loans** tab of that eDoc. The **Asset External Institution Maintenance Lookup** form will be displayed. When the **Asset External Institution Maintenance Lookup** form is displayed, complete the desired combination of search criteria fields to filter your search, and click the button to display results matching the criteria you specified. When the search results appear at the bottom of the page, click the *return value* link for the desired ID code. The **Equipment Loan/Return** eDoc will be displayed again, with the *External Institution ID* field populated accordingly on the **Equipment Loans** tab.

Asset External Institution Maintenance eDoc

This eDoc enables you to update the CAMS database tables by adding a new record for an external institution or other entity that is not yet present in the database. To access and complete this eDoc, proceed as follows:

1. Launch the **Asset External Institution Maintenance Lookup** form in either of the two ways described earlier in this section of the guide.
2. When the **Asset External Institution Maintenance Lookup** form is displayed, click the button in the upper right-hand corner of the lookup form.

The **Asset External Institution Maintenance** eDoc form will be displayed. This eDoc includes a basic set of standard tabs found in most eDocs, plus the **Edit Asset External Institution** tab. Fields

marked with an asterisk (*) are required, and must be completed in order to submit the eDoc. In the upper right-hand area of the screen, the fields for document number, status, Initiator, and the creation date will be populated by the system.

3. In the *Description* field in the uppermost folder tab, labeled **Document Overview**, type a brief description (40 characters max.) of the institution or entity for which you are submitting the eDoc. (Below the *Description* field, the *Organization Document Number* field is not in use at this time.)

NOTE: The eDoc you are creating could appear in the results of a document search performed by any Kuali user. Do not include any sensitive information in the *Description* field because that description will be visible in the search results.

4. The *Explanation* text box is an optional field. If desired, use it to enter additional notes or a continuation of the information you have entered in the *Description* field.
5. In the **Edit Asset External Institution** tab, complete all the required fields, as well as any others for which you can enter the requested information. Most of these fields are self-explanatory, but the following notes offer additional guidance.
 - In the *Asset Institution ID* field, enter an alphabetical ID code of your own choosing for the external entity that you are adding to the CAMS database. It is best to choose an existing abbreviation, or else create an ID that will be easy to remember later if you need to recall it while completing an **Equipment Loan/Return** eDoc. It is also preferable to select an ID code that will make it easy for other users to determine the name of the entity that it represents. (A couple of good examples are *JPL* for Jet Propulsion Laboratory, and *MIT* for Massachusetts Institute of Technology.)
If you enter an ID code that has already been used to identify another external entity, the system will present you with a message that says, *"This document cannot be Saved or Routed because a newer version of the maintenance record already exists."*
 - In the *Asset Institution Description* field, enter the name of the external entity that you are adding to the CAMS database.
 - Be sure to leave the *Active Indicator* check box selected (i.e., checked) so that the external entity you are adding will be included among the institutions and other external entities shown as currently active in the CAMS database.

6. If you need to add any general comments or attachments to the eDoc, then complete the **Notes and Attachments** tab, as follows:
 - a. Click the button on the **Notes and Attachments** tab to reveal the fields and controls used for adding comments and attaching related files.
 - b. Type your comments in the text box labeled *Note Text*. If you are just attaching a file, you must enter the file name or a brief comment in the text box. (This is a required field.)
 - c. To add an attachment, click the button next to the *Attached File* field and navigate to the location of the file on your computer that you want to attach to this eDoc. The full path of the file that you have selected will appear in the *Attached File* field, but it is not yet attached.

If you want to change your selection to a different file, click the small button just below the *Attached File* field. When that field is empty again, click the button once more to locate the other file that you want to attach.

- d. To save the notes you entered and attach the file that you selected (if applicable), click the button located to the right of the *Attached File* field.
7. If you need to send a courtesy *FYI* notification to someone when submitting the eDoc, then complete the **Ad Hoc Recipients** tab as follows:
 - a. Select *FYI* from the *Action Requested* drop-down list in the *Person Requests* section.
 - b. In the *Person* field, enter the User ID of the person to whom you want to route the eDoc. If you need to search for the User ID of the intended recipient, click the lookup icon  next to the *Person* field. When the **Person Lookup** page appears, enter search criteria as needed to locate the desired person. When the search results are displayed, click the *return value* link for your intended recipient. The **Asset Location Global** eDoc will be displayed again, with the *Person* field populated accordingly.
 - c. Click the button in the *Actions* column.
 8. When you are ready to submit the eDoc, click the button.

When the refreshed eDoc page appears, scroll to the top of the screen in order to view the status of your eDoc submission. The status message will state “Document successfully submitted” if there were no errors found in your eDoc. If the status message indicates that there were errors, such as missing information, take note of the problem and make the necessary changes or additions to the information you entered. After correcting your eDoc, click the button again, and then check the new status message to see if any further adjustments are needed.

If you later want to check on the status of an eDoc you have submitted, refer to the instructions presented in **Checking the Status of a Submitted eDoc** on page 29 of this guide.

Asset Inquiry (Viewing Information About an Asset)

The read-only **Asset Inquiry** document presents all of the information on file for a particular asset in the asset database. You can launch this document either by clicking the hyperlinked Asset Number for the desired asset in the search results table for the **Asset Lookup** or **Asset Payment Lookup** form, or by selecting the **view** action for a retired asset in the search results table for either of those lookup forms.

In addition to the standard **Document Overview, Notes and Attachments, Ad Hoc Recipients, and Route Log** tabs, the **Asset Inquiry** document may include all of the following tabs. The specific tabs displayed for a given asset may vary because certain tabs may not be applicable to the asset in question. Descriptions for these tabs are presented next in this guide.

- Asset Detail Information
- Asset Location
- Organization Information
- Payments
- Payment Summary
- Payments Lookup
- Land Information
- Asset Depreciation Information
- View Asset Merge History
- View Asset Separate History
- View Retirement Information
- View Equipment Loan Information
- Warranty
- Repair History
- Components
- Lookup Related Capital Asset Documents

Asset Detail Information Tab

This tab presents detailed identification information currently included in the asset's database record. (You can find descriptions for most of the fields on this tab in the table that lists the fields on the **Asset Lookup** form, which begins on page 6.)

Asset Location Tab

This tab presents the location information currently included in the asset's database record.

Organization Information Tab

This tab presents the organization information included in the asset's database record. (You can find descriptions for several fields on this tab in the table that lists the fields on the **Asset Lookup** form, which begins on page 6.)

Payments Tab and Payments Summary Tab

If 10 or fewer payments associated with the asset are on file in the system, the **Payments** tab will be displayed, presenting details for those payments. If more than 10 payments are on file in the system, the **Payments Summary** tab will be displayed, presenting only a *Payments Total* amount.

Payments Lookup Tab

This tab merely contains a link that provides a convenient way to launch the **Asset Payment Lookup** form (discussed earlier; see page 10), automatically populated with results for the asset in question.

Land Information Tab

This tab is not currently used by USC. Its purpose is to display information about any land related to the asset in question.

Asset Depreciation Information Tab

This tab presents the depreciation information included in the asset's database record, as well as links that provide a convenient way to launch the **Asset Payment Depreciation Lookup** form (discussed earlier; see page 13) and the **Asset Year End Book Value Calculator** form (discussed earlier; see page 17).

View Asset Merge History Tab

This tab is shown only if the asset was combined with another asset. The **View Asset Merge History** tab displays the original Asset Number that was assigned to the asset in question before it was merged, and also the date on which the merge occurred and the original Asset Number was retired.

View Asset Separate History Tab

This tab is shown only if the asset was previously part of another asset. The **View Asset Separate History** tab displays the "Original Asset Number" for the asset from which this asset was removed, and the date on which the separation occurred.

View Retirement Information Tab

If the asset has been retired, this tab presents information pertaining to its retirement.

View Equipment Loan Information Tab

If applicable, this tab presents information pertaining to the loan of the asset, including the loan dates and the address and telephone number for the borrower and the physical location where the asset is stored.

Warranty Tab

This tab presents the warranty information currently included in the database record of the asset.

Repair History Tab

This tab presents any repair history that has been entered in the asset's database record.

Components Tab

This tab presents a list of any component units that have been entered in the asset's database record.

Lookup Related Capital Asset Documents Tab

This tab merely presents links that offer a convenient way to view other Kuali eDocs pertaining to the asset. The following links may be included:

- **Asset Edit** – Click this link to view any **Asset** eDocs that were submitted to edit information in the database record for the same asset.
- **Asset Construction in Progress (CIP)** – *(Pertains to an eDoc not currently used by USC.)*
- **Asset Global Create or Separate** – Click this link to view the **Asset Global** eDoc that was used by the Equipment Management department to create a database record for the asset, or to separate the asset from another asset with which it was previously combined.
- **Asset Payments** – Click this link to view any **Asset Payments** eDocs that have been submitted by Equipment Management personnel to enter payment information manually for this asset.
- **Asset Transfer** – *(Pertains to an eDoc not currently used by USC.)*
- **Equipment Loan or Return** – Click this link to view any **Equipment Loan/Return** eDocs (discussed earlier in this guide; see page 21) that pertain to this asset.
- **Asset Location Global** – Click this link to view any **Asset Location Global** eDocs (discussed earlier in this guide; see page 8) that pertain to this asset.
- **Asset Retirement Global** – Click this link to view any **Asset Retirement Global** eDocs (discussed earlier; see page 14) that pertain to this asset.
- **Asset Maintenance, Fabrication, Location, Create, Separate, Retirement** – Click this link if you want to view *all* CAMS eDocs, of any type, pertaining to this asset.

Saving an eDoc Before You Are Ready to Submit It

There may be times when you cannot finish entering information for a CAMS eDoc in one sitting, or you might need to postpone submitting it. On those occasions, you can save the eDoc without losing any of the information that you have entered.

When you click the  button at the bottom of the screen, all the information you have entered will be preserved so that you can return to it later. The eDoc that you saved will wait in your Action List, which you can access by clicking the  button in the upper left-hand portion of the Main Menu screens.

When you are ready to complete an eDoc that you previously saved, open it from your Action List, finish entering all required information, and then click the  button at the bottom of the eDoc screen.

Resubmitting an eDoc Returned for Correction

You may occasionally receive an email message from the Kuali system informing you that an eDoc needs your attention. The email message will contain a link that you can click to access the eDoc in question.

Once you have opened the eDoc that requires changes, look at the **Notes and Attachments** tab to find out what information you might need to revise or add. After you have made the required changes or additions to the information you entered when you originally submitted the eDoc, click the  button at the bottom of the screen to resubmit the eDoc.

Checking the Status of a Submitted eDoc

Use this procedure to learn the current status of an eDoc after you have submitted it.

1. Log into the Kuali system, as described in **Accessing CAMS Functions** on page 5 of this guide.
2. Near the top of the Financial Main Menu screen, click the  button.
The **Document Lookup** page will be displayed.
3. Type your user name in the *Initiator* field.

TIP: If you are unsure of your user name, note that it is displayed after “Logged in User:” in the upper right-hand area of the Kuali window.

4. If you know the Document Number of the eDoc in question, enter it in the *Document/Notification ID* field.
5. Use the date selector tools adjacent to the *Date Created From/To* fields to specify the date range during which you submitted the eDoc in question.
6. Click the **search** button.
The search results, consisting of all the eDocs that you submitted during the specified time period, will be displayed in a table at the bottom of the screen.
7. In the search results table, identify the eDoc whose status you want to check, and click the document icon at the rightmost end of the same row, in the column labeled *Route Log*.
The screen will change to display status information for the eDoc in question, so that you can see where it is in the approval process.

Logging Out of the Kuali System

There is no “Log Out” button in the Kuali system. To exit Kuali, you must close all open windows of your Web browser using the standard window **Close**  button. (On an Apple computer running the OS X operating system, you must also quit the browser.)