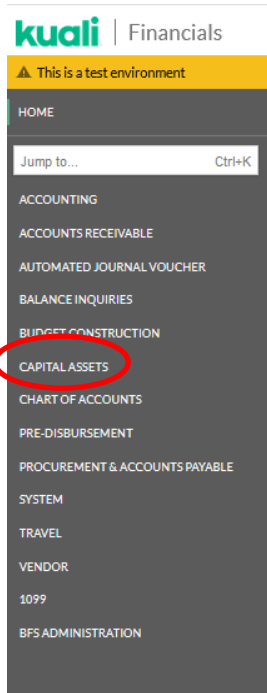


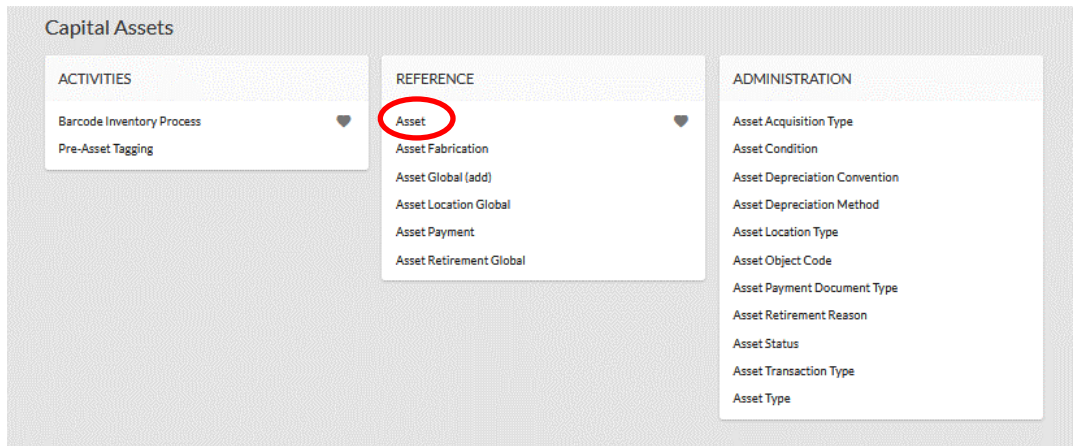
Creating a Loan or Renew or Return Document in Kualii

PURPOSE: To track equipment located at an off-campus location for more than 30 days.

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



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



The Asset Lookup screen will open. Search for an asset by entering known asset information, such as the **Tag Number** (CSU decal number). After entering known information, click on the **Search** button.

Tag Number:

Asset Number:

Organization Owner Chart Of Accounts Code:

Organization Owner Organization Code:

Organization Owner Account Number:

Owner:

Campus:

Building Code:

Building Room Number:

Asset Type Code:

Asset Status Code:

Asset Condition:

Vendor Name:

Manufacturer:

Model Number:

Serial Number:

Create Date From:

Create Date To:

Asset Representative Principal Name:

Organization Inventory Name:

Asset Description:

When the search results are retrieved, confirm it is the correct asset. Click on **loan** in the actions box at the left for an initial loan, **renew** for a renewal, or **return** for a loan return to campus. *Note:* The available options you can use will be underlined.

Search Results

Actions	Asset Number	Tag Number	Organization Owner Organization Code	Building Code	Asset Status Code	Asset Description
<u>loan</u> <u>renew</u> <u>return</u> <u>merge</u> <u>separate</u>	505420	325353	1372	1101	A	HYDRAULIC DISTRIBUTION MANIFOLD

Export options: CSV | spreadsheet | XML

LOAN: Click on **loan**. The Loan document will open.

DOCUMENT OVERVIEW

OVERVIEW

Description:

Organization Document Number:

Explanation:

ASSET

Asset Information	Asset Number: 505420	Organization Owner Account Number: 1372090
Asset Description: HYDRAULIC DISTRIBUTION MANIFOLD	Organization Owner Chart Of Accounts Code: CO	Asset Condition: 1372
Owner: CSU	Asset Type Code: G	Manufacturer: 475405I
Asset Status Code: A	Acquisition Type Code: P	Manufacturer: M T S SYSTEMS CORP
Vendor Name: M T S Systems Corp	Model Number: HD 293 DTI	Serial Number: NONE
Tag Number: 325353	Government Tag: 325353	Old Tag Number:
In-Service Date: 10/05/2012	National Stock Number:	Serial Number:
Fiscal Year: 2013	Create Date: 10/05/2012	Tag Number:
Period: 04	Last Inventory Date: 02/18/2019 12:00 AM	Manufacturer:

EQUIPMENT LOANS

1. Enter a **Description** and brief **Explanation** in the **Document Overview** tab.
2. Review the asset information in the **Asset** tab.
3. In the **Equipment Loans** tab, use the magnifying glass lookup icon for the **Borrower ID**.
 - a. **Borrower ID:**
 - i. The borrower id entered on the loan document must be an active CSU employee in KFS. Usually this is the PI, faculty member, or other staff member in possession of the equipment.
 - ii. If the borrower is not an active KFS user, enter an active user's name within the department (e.g., the Department Property Contact [DPC]) and record the actual borrower's name in the Notes and Attachments tab.

- The **Loan Date** auto-fills with the current date, although you can manually change it if needed.
- Enter the **Expected Return Date**. The document will only allow you to enter a return date two (2) years or less from the current date. You will need to renew the loan every two years if the equipment is being loaned long term.
- Complete the **Borrower's Address** tab with the borrower's personal address, do not use a CSU office/lab address. *Note:* The address does not auto-fill based on the user ID. If the equipment is located and stored at the same location, the user will only need to complete the borrower's address. Otherwise, the stored at (housed at) location will need to be completed in addition to the borrower's address.

- Click on **Submit** when you are finished. You should see the message **Document was successfully submitted** at the top of the document. If you see an error message instead (in red lettering), read the explanation of the problem – correct the error and resubmit.

RENEW: Repeat the procedure used to look up an asset. *Note:* An asset must currently be in loan status in CAM to be able to use renew. If the renew link is not underlined, then the asset is not currently on loan. Click on **renew**. The Loan document will open.

- Enter a **Description** and brief **Explanation** in the **Document Overview** tab.
- Review the asset information in the **Asset** tab.
- In the **Equipment Loans** tab, The **Loan Date** auto-fills with the current date, although you can manually change it if needed.
- Enter the **Expected Return Date**. The document will only allow you to enter a return date two (2) years or less from the current date. You will need to renew the loan again in two years if the equipment is being loaned long term.
- Attach a completed Inventory Verification of Loaned Assets form (located on the last page of this document) in the NOTES AND ATTACHMENTS tab. Remember to click on the ADD button to attachment it to the document.

- Click on **Submit** when you are finished. You should see the message **Document was successfully submitted** at the top of the document. If you see an error message instead (in red lettering), read the explanation of the problem – correct the error and resubmit.

RETURN: Repeat the procedure used to look up an asset. *Note:* An asset must currently be in loan status in CAM to be able to use return. If the return link is not underlined, then the asset is not currently on loan. Click on **return**. The Loan document will open.

- Enter a **Description** and brief **Explanation** in the **Document Overview** tab.
- Review the asset information in the **Asset** tab.
- In the **Equipment Loans** tab, the **Loan Return Date** is auto populated with the current date, although you can manually change it if needed.

4. Enter the **Return Date**. The Return Date must be within two (2) years or less from the original loan date and cannot be before the original loan date.
5. Click on **Submit** when you are finished. You should see the message **Document was successfully submitted** at the top of the document. If you see an error message instead (in red lettering), read the explanation of the problem – correct the error and resubmit.
6. Check the asset record to review the listed location of the asset. *Note:* The return document does not allow you to update the location of the asset. If the asset was returned to a location other than the listed location in the asset record, submit an Asset Edit document to update the record to reflect the current location of the asset.



Inventory verification of loaned assets
 Business and Financial Services
 Property Management Office

Colorado State University
 Business and Financial Services
 Property Management
 555 S. Howes St, 3rd Floor
 6003 Campus Delivery
 Fort Collins, CO, 80523
 (970) 491-2270

Dear Asset Representative

Date

Colorado State University is conducting a biennial physical inventory of capital assets including all off site controlled property.

Property has been loaned to you for use on a collaborative project and our records show the following item(s) in your possession:

Please:

- 1) Physically verify that you have these items with a submission of a date stamped photograph of its CSU id tag or serial number. Photograph may be waived in certain circumstances-please partner with your Department Property Contact.
- 2) Verify the property record details are accurate
- 3) List any CSU property not included above
- 3) E-mail this completed affidavit and photograph(s) to the CSU Property Management Office bfs_property_management@colostate.edu

Affidavit:

I affirm that all property containing a CSU id tag, listed above, is in my possession, and has been physically inventoried.

Name

Title

Date

If the property is no longer in your possession, please provide detailed information on its current location and custodian. Attach any supporting correspondence or documentation in addition to this affidavit.

Name

Title

Date

If you have any questions, please feel free to contact the Property Management Office at Colorado State University at bfs_property_management@colostate.edu or (970) 491-2270

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