Creating a Loan Document in Kuali

First you need to find the asset you wish to loan (check-out). On the Main Menu screen under the **Lookup and Maintenance** box in the middle of the screen look under the **Capital Asset Management** heading and click on **Asset**. Search by entering the CSU decal number into the **Tag Number** field. Once you find your asset, click on **Loan** in the actions to the left. You will see the following screen.

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

2. Browse through the Asset Information in the **Asset** tab to make sure this is the asset you want to loan.

3. On the **Equipment Loans** tab, you'll need to do a lookup for the **Borrower ID**, and then enter the **Expected Return Date**. The document will only allow you to enter a return date 2 years or less from the loan date. You will need to renew the loan every two years if the equipment is being loaned long term. It auto-fills the **Loan Date** with the current date, although you can manually change it.

4. You'll then need to fill out the **Borrower's Address** tab with their information, including the location of where the asset will be housed. It does not auto-fill based on user ID.

An important thing to note is that the Borrower will need to approve this document so please be sure that they are aware of this and have access to Kuali!! If they do not have access to Kuali (because they are in another country, etc.) please contact us so that we can make arrangements to have the document pushed through without their approval!

5. Click on submit when you are finished. You will get an error message if any required fields were left blank or filled in with inappropriate data. Otherwise, you will see the message **Document was successfully submitted** at the top of the document!