

CAPITAL ASSETS

ASSET CONFIGURATION DOCUMENT INSTRUCTIONS

After the requisition with capital line items in Buy.IU has been approved, the individual listed as Prepared By on the requisition will receive the Asset Configuration Document in their KFS action list to complete. The Asset Configuration Document must be completed before the Purchase Order is sent to the supplier.

NAVIGATION MENU

The Asset Configuration Document is broken down into different pages that can be navigated to easily from the navigation menu on the left of the screen. The different pages are:

Overview: Displays all the summary information about the order including links to the PO in Buy.IU and quotes attached to the order. The capital payments on the PO are displayed in the Accounting Lines section of this page.

Workflow: Displays all notes and workflow actions that have occurred on the document. Allows user to add a note, send a note, or ad hoc route the document to another user.

Systems: Contains the capital line items from the PO. This is the section of the document where the initiator will configure the assets and provide the required asset information. CONFIGURING ASSETS

1. To begin configuring assets, navigate to **System 1**. All line items marked as capital on the PO will be displayed on this page initially.

System 1 - ND 2000C Laptop promo Spectrometer

Select	Item	Description	UOM	Unit Cost	Quantity	Selected Quantity	Remainder	Extended Cost
<input checked="" type="checkbox"/>	1	ND 2000C Laptop promo Spectrometer	EA	\$11,995.00	1	1 Qty ▾	0	\$11,995.00
<input type="checkbox"/>	2	Axgel Gel Documentation System	EA	\$8,368.00	2		2	\$0.00
<input type="checkbox"/>	3	Shaker Incubator Eppendorf Excella F-25	EA	\$979.77	1		1	\$0.00
<input type="checkbox"/>	4	Innova ERLN Flask Clamps 500ML	EA	\$32.25	3		3	\$0.00
<input type="checkbox"/>	5	Innova ERLN Flask Clamps 100ML	EA	\$27.93	3		3	\$0.00
<input type="checkbox"/>	6	Training	EA	\$100.00	1		1	\$0.00

The select boxes in the far left column are used to select items to configure into system assets.

- If the item is an individual asset, only the single item will be chosen before completing the asset information section of the document.
- If all items combine to make a single system asset, then click the **Select All Items** button to select all items.
- If there are multiple systems, then select the lines that combine to make up the first system, enter the asset information for that system, then repeat for the next system.

See [Appendix A](#) for a detailed example with instructions on how to configure multiple systems.

2. After items are selected a drop down appears in the selected quantity field for the items selected.

There are three options:

- **Select by Amount:** Enter the dollar amount to be included in the current system. Usually used if item has a quantity of 1 and needs to be allocated to different assets (i.e. training).
- **Select by Percentage:** Enter the percentage of the amount to be included in the current system. Usually used if item has a quantity of 1 and needs to be allocated to different assets (i.e. training).
- **Select by Quantity (default):** Enter the quantity of the items to be included in the current system.

Select	Item	Description	UOM	Unit Cost	Quantity	Selected Quantity	Remainder	Extended Cost
<input checked="" type="checkbox"/>	1	ND 2000C Laptop promo Spectrometer	EA	\$11,995.00	1	1 Qty ▾	0	\$11,995.00
<input type="checkbox"/>	2	Axgel Gel Documentation System	EA	\$8,368.00	2	Select by Amount	2	\$0.00
<input type="checkbox"/>	3	Shaker Incubator Eppendorf Excella F-25	EA	\$979.77	1	Select by Percentage	1	\$0.00
<input type="checkbox"/>	4	Innova ERLN Flask Clamps 500ML	EA	\$32.25	3	Select by Quantity	3	\$0.00
<input type="checkbox"/>	5	Innova ERLN Flask Clamps 100ML	EA	\$27.93	3		3	\$0.00
<input checked="" type="checkbox"/>	6	Training	EA	\$100.00	1	\$25.00 Amt ▾	\$75.00	\$25.00

As items are selected, the amount in the Remainder column is updated to show what item quantities, percentages, or amounts remain to be configured. Amounts, percentages, or quantities selected cannot be greater than the remainder or an error will be displayed.

3. The next decision is to decide if items selected in current system will be a new asset or will be added to existing assets.

New Asset Add Selected to Existing Assets

- Select **New Asset** if purchasing items that will be new assets. This option is defaulted as this is the most common selection.
 - Select **Add Selected to Existing Assets** if purchasing items that will modify existing assets. This option is used for items purchased to upgrade an existing capital asset in our system.
4. Enter capital asset information. All fields marked with an * are required to be completed.

New Asset

New Asset Add Selected to Existing Assets

Asset Description *

ND 2000C Laptop promo Spectrometer

Number of Assets to be Created *

1

Asset to be Placed In-Service When Received?

Yes No

Asset Type *

40004



MOVEABLE ASSETS NOT YET RECEIVED, OR PLACED IN SERVICE

Expected In-Service Date *

Organization Text

Use this field to provide additional information that would help inventory this Asset

Manufacturer *



Model Number

- **Asset Description:** Will automatically populate with the description of the first item selected. If this does not accurately describe the asset, update the description by typing it in the text box.
- **Number of Assets to be Created:** Defaults to the quantity of the first item selected and defaults to blank if multiple items are selected with different quantities. If quantity is different than the default, change the quantity by typing in the text box.
- **Asset to be Placed in Service Within 30 days of Receipt?:**
 - Select **Yes** if expect asset to be used within 30 days of receiving it from the supplier.
 - Select **No** if not expected to start using the asset right away. For example, if buying equipment for a kitchen that is under renovation and is not expected to be open to the public until August of next year.

- **Expected In-Service Date:** Only displayed and required if **No** is selected for previous question. This field can be populated by typing in the date or selecting the date from the calendar. This date must be at least 30 days in the future from today’s date or an error will be displayed. This date will be populated in the organization text field of the asset for inventory internal control purposes.
- **Asset Type:** Determines the life span of the asset. The description or code can be typed directly into the text box or can be searched from the list by clicking .
 - a. If selected **No** for the in-service question, the asset type code will automatically default to 40004 and cannot be changed from this value unless the in-service answer is changed to **Yes**. This will prevent the asset from depreciating until it is placed in service.
- **Organization Text:** Optional field to provide additional information that would help inventory this asset.
- **Manufacturer:** Can be typed directly into the text box. If the manufacturer is the same as the supplier, click  to automatically populate the supplier name in this field.
- **Model Number:** Enter model number in the text box.

LOCATION

- Enter the location of where the asset will be used.
 - a. **Qty:** Enter the number of assets to be located in this location. The sum of the quantities in the location section must equal the value in the **Number of Assets to be Created** field above or an error will display.
 - b. **Campus:** Enter the campus in the text box or select from the drop down values.
 - c. **Building:** Either the building code or name can be typed into the text box or can be searched by clicking . Value entered must be a valid building code.
 - d. **Room:** Enter in room number or search for available rooms by clicking . Value entered must be a valid room for the building selected.
 - e. **SubRoom:** Enter sub room, if applicable.

Location 1



Qty *	Campus	Building *	Room *	SubRoom	<input type="checkbox"/> Off-Campus
1	BL	BL071 CHEMISTRY	027		<input type="checkbox"/>

- a. **Off-Campus:** Select if asset will be used in a building that is not listed in the official IU building list.
 - i. **Name:** Enter name of building if it has a name.
 - ii. **Address:** Enter street address of off-campus building.
 - iii. **City:** Enter city of off-campus building.
 - iv. **State:** Enter state of off-campus building.
 - v. **Country:** Enter country of off-campus building.

Location 1



Qty *	Campus	Name	Address *	<input checked="" type="checkbox"/> Off-Campus
<input type="text" value="0"/>	<input type="text" value="v"/>	<input type="text"/>	<input type="text"/>	
City *	Postal Code *	State *	Country *	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	

If an additional location is needed, click on the to add a second location. If you need to delete a location, click the button.

Add Selected to Existing Assets

- New Asset Add Selected to Existing Assets

Search Assets *

- **Asset Number:** Enter asset number in the text field or search for an asset by clicking .
- **Add:** Click to add asset number. Will add asset with description, chart, and org to selected asset(s) section below and provide a blank text box to enter additional asset numbers, if applicable. If added incorrect asset, click to delete asset.

- New Asset Add Selected to Existing Assets

Search Assets *

Selected Asset(s):

501438
Cisco C40 video conferencing
S...
Chart: IN, Org: SURC

5. Select next action from available action buttons presented at the bottom of the screen.

ACTION BUTTONS

- **Configure Next System:** This button is only presented if there are items still left to configure. Click this button after completing all the required capital asset information for the current system. This will reset the screen to begin configuration on the next system.

- **Save** – Saves the document and checks for errors.
- **Clear System** – Unselects all items and clears all data related to the **current system only**.
- **Clear All Systems** – Resets document to its original state and deletes all data for all systems. **Only select this button if you want to start the entire document over again.**
- **Submit** – Checks for errors and submits the document. This button is greyed out and not available to select until all items have been configured.

More items left for
configuration

Configure Next
System

Save

Submit

Clear System

Clear All Systems

Appendix A

EXAMPLE FOR CONFIGURING MULTIPLE SYSTEMS

Navigate to System 1. Before you can begin configuring assets, you must know if each line item is an individual asset or if it is to be combined with other line items to make a system asset. In the example above, we are told by the requestor:

- Spectrometer (Item 1) is an individual asset
- Gel Documentation Systems (Item 2) are two individual assets
- Flask clamps (Items 4 & 5) go with the Shaker Incubator (item 3) to make a system asset
- Training (Item 6) is related to all items

According to the above information, there will be three systems with a total of four assets:

- System 1 Spectrometer – 1 asset
- System 2 Gel Documentation System – 2 assets
- System 3 Shaker Incubator – 1 asset

System 1 Spectrometer

1. Select all items to be included in the system.
 - Select Item 1 Spectrometer.
 - Select Item 6 Training to include a portion of the training costs.
2. Determine the amounts of each item to be included.
 - In this example, the Spectrometer has a quantity of 1 so no need to change the drop-down or text box from the default.
 - Training also has a quantity of 1, but this is to be distributed between the four assets. In order to select only $\frac{1}{4}$ of this cost, choose **Select by Percentage**. Enter in 25% in the text box since only $\frac{1}{4}$ of the cost is to be applied to the Spectrometer.

System 1 - ND 2000C Laptop promo Spectrometer \$11,995.00

Select All Items

Select	Item	Description	UOM	Unit Cost	Quantity	Selected Quantity	Remainder	Extended Cost
<input checked="" type="checkbox"/>	1	ND 2000C Laptop promo Spectrometer	EA	\$11,995.00	1	1 <input type="text"/> Qty ▾	0	\$11,995.00
<input type="checkbox"/>	2	Axgel Gel Documentation System	EA	\$8,368.00	2		2	\$0.00
<input type="checkbox"/>	3	Shaker Incubator Eppendorf Excella F-25	EA	\$979.77	1		1	\$0.00
<input type="checkbox"/>	4	Innova ERLN Flask Clamps 500ML	EA	\$32.25	3		3	\$0.00
<input type="checkbox"/>	5	Innova ERLN Flask Clamps 100ML	EA	\$27.93	3		3	\$0.00
<input checked="" type="checkbox"/>	6	Training	EA	\$100.00	1	25.00% <input type="text"/> Pct ▾	75%	\$25.00

New Asset Add Selected to Existing Assets

Note how the remainder column adjusts to reflect the quantity, amount, or percentage remaining to be configured for that item.

3. Since this example is purchasing new assets, leave as the default of **New Asset**.

Asset Description *

ND 2000C Laptop promo Spectrometer

Number of Assets to be Created *

1

Asset to be Placed In-Service When Received?

Yes No

Asset Type *

454

SPECTROMETER,SPECTROPHOTOMETER

Organization Text

Use this field to provide additional information that would help inventory this Asset

Manufacturer *

Fisher Scientific

Model Number

ND 2000C

4. Enter asset information for spectrometer.

- **Asset Description:** Will automatically populate with the description of the first item selected and is appropriate for this asset so no editing is required.
 - **Number of Assets to be Created:** Same as the defaulted value of 1.
 - **Asset to be Placed in Service Within 30 days of Receipt?:** Click Yes.
 - **Asset Type:** In this example, start typing “spectrometer”, and a list of items with that description will display for selection. Select 454 from the list.
 - **Manufacturer:** Type Fisher Scientific.
 - **Model Number:** Type ND 2000C.
5. Enter location information for the spectrometer.
- **Qty:** In this example, there is only 1 spectrometer so only 1 Qty in this location.
 - **Campus:** Type or select BL from the drop down values.
 - **Building:** Type or select BL071 from the drop down values.
 - **Room:** Type or search for room 027.

Location 1 +

Qty *	Campus	Building *	Room *	SubRoom	<input type="checkbox"/> Off-Campus
1	BL	BL071	027	<input type="text"/>	
		CHEMISTRY			

6. Click Configure Next System.

More items left for configuration Configure Next System

Save

Submit

Clear System

Clear All Systems

System 2 Gel Documentation System

1. Select items included in the Gel Documentation System assets.
 - Select Item 2 Gel Documentation System. Include quantity of 2.
 - Select Item 6 Training. Include 50% (25% for each asset x 2 assets).

System 2 - Axgel Gel Documentation System

Select All Items

Select	Item	Description	UOM	Unit Cost	Quantity	Selected Quantity	Remainder	Extended Cost
	1	ND 2000C Laptop promo Spectrometer	EA	\$11,995.00	1	Selected In Other System(s)	0	\$0.00
<input checked="" type="checkbox"/>	2	Axgel Gel Documentation System	EA	\$8,368.00	2	2 Qty ▾	0	\$16,736.00
<input type="checkbox"/>	3	Shaker Incubator Eppendorf Excella F-25	EA	\$979.77	1		1	\$0.00
<input type="checkbox"/>	4	Innova ERLN Flask Clamps 500ML	EA	\$32.25	3		3	\$0.00
<input type="checkbox"/>	5	Innova ERLN Flask Clamps 100ML	EA	\$27.93	3		3	\$0.00
<input checked="" type="checkbox"/>	6	Training	EA	\$100.00	1	50.00% Pct ▾	25%	\$50.00

New Asset Add Selected to Existing Assets

Note that the other items previously selected for other systems is either greyed out or remainder amount is reduced.

2. Leave the defaulted choice of **New Asset**.
3. Enter asset information for the Gel Documentation Systems.
 - **Asset Description:** Leave as default.
 - **Number of Assets to be Created:** Same as the defaulted value of 2.
 - **Asset to be Placed in Service Within 30 days of Receipt?:** Click Yes.
 - **Asset Type:** Enter 383 Scientific Equipment.
 - **Manufacturer:** Type Axgel.
 - **Model Number:** Leave blank.

Asset Description *

Axgel Gel Documentation System

Number of Assets to be Created *

2

 The number of assets to be created does not equal the number of assets in the locations

Asset Type *

383

SCIENTIFIC EQUIPMENT - 8 YRS

Asset to be Placed In-Service When Received?

Yes No

Organization Text

Use this field to provide additional information that would help inventory this Asset

Manufacturer *

Axgel

Model Number

- Enter location information for the Gel Documentation System. In this example, we find out that one of them will be used in BL071 Room 027 and the other in room 121.
 - Qty:** In this example, there in only 1 Qty in each location so enter 1.
 - Campus:** Type or select BL from the drop down values.
 - Building:** Type or select BL071 from the drop down values.
 - Room:** Type or search for room 027.
- Click on the  to add a second location.
 - Qty:** Enter 1.
 - Campus:** Type or select BL from the drop down values.
 - Building:** Type or select BL071 from the drop down values.
 - Room:** Type or search for room 121.

Location 1



Qty *	Campus	Building *	Room *	SubRoom	<input type="checkbox"/> Off-Campus
1	BL	BL071 <small>CHEMISTRY</small>	027		

Location 2



Qty *	Campus	Building *	Room *	SubRoom	<input type="checkbox"/> Off-Campus
1	BL	BL071 <small>CHEMISTRY</small>	121 <small>RESEARCH SUPPORT GROUP</small>		

- Click Configure Next System.

System 3 Shaker Incubator

1. Since all remaining items are for the next system, click **Select All Items** button to select all remaining items.

System 3 - Shaker Incubator Eppendorf Excella F-25

Select All Items

Select	Item	Description	UOM	Unit Cost	Quantity	Selected Quantity	Remainder	Extended Cost
	1	ND 2000C Laptop promo Spectrometer	EA	\$11,995.00	1	Selected In Other System(s)	0	\$0.00
	2	Axgel Gel Documentation System	EA	\$8,368.00	2	Selected In Other System(s)	0	\$0.00
<input checked="" type="checkbox"/>	3	Shaker Incubator Eppendorf Excella F-25	EA	\$979.77	1	<input type="text" value="1"/> Qty ▾	0	\$979.77
<input checked="" type="checkbox"/>	4	Innova ERLN Flask Clamps 500ML	EA	\$32.25	3	<input type="text" value="3"/> Qty ▾	0	\$96.75
<input checked="" type="checkbox"/>	5	Innova ERLN Flask Clamps 100ML	EA	\$27.93	3	<input type="text" value="3"/> Qty ▾	0	\$83.79
<input checked="" type="checkbox"/>	6	Training	EA	\$100.00	1	<input type="text" value="25.00%"/> Pct ▾	0%	\$25.00

New Asset Add Selected to Existing Assets

2. Leave the defaulted choice of **New Asset**.
3. Enter asset information for the Shaker Incubator.
 - **Asset Description:** Leave as default in this example.
 - **Number of Assets to be Created:** Enter 1 since this is a single asset.
 - **Asset to be Placed in Service Within 30 days of Receipt?:** For this asset, assume asset will not be placed in service until August 2020. Click **No**. Answering No requires the completion of the Expected In-Service Date field.
 - **Expected In-Service Date:** Enter in 8/15/2019 for the date or select from calendar.
 - **Asset Type:** Defaulted to 40004 and cannot be changed since not expected to be placed in service within 30 days of receipt.
 - **Manufacturer:** Click  to set manufacturer to supplier name.
 - **Model Number:** Enter F-25.

Asset Description *

Shaker Incubator Eppendorf Excella F-25

Number of Assets to be Created *

1

Asset to be Placed In-Service When Received?

Yes No

Asset Type *

40004



MOVEABLE ASSETS NOT YET RECEIVED, OR PLACED IN SERVICE

Expected In-Service Date *

08-15-2019

Organization Text

Use this field to provide additional information that would help inventory this Asset

Manufacturer *

Alpha Baking Inc



Model Number

F-25

7. Enter location information for the Shaker Incubator.
 - **Qty:** Enter 1.
 - **Campus:** Type or select BL from the drop down values.
 - **Building:** Type or select BL071 from the drop down values.
 - **Room:** Type or search for room 027.
8. Now that all items have been configured only the following action buttons are displayed. Notice the **Configure Next System** button is no longer available.

Save

Submit

Clear System

Clear All Systems

9. Click **Submit**.