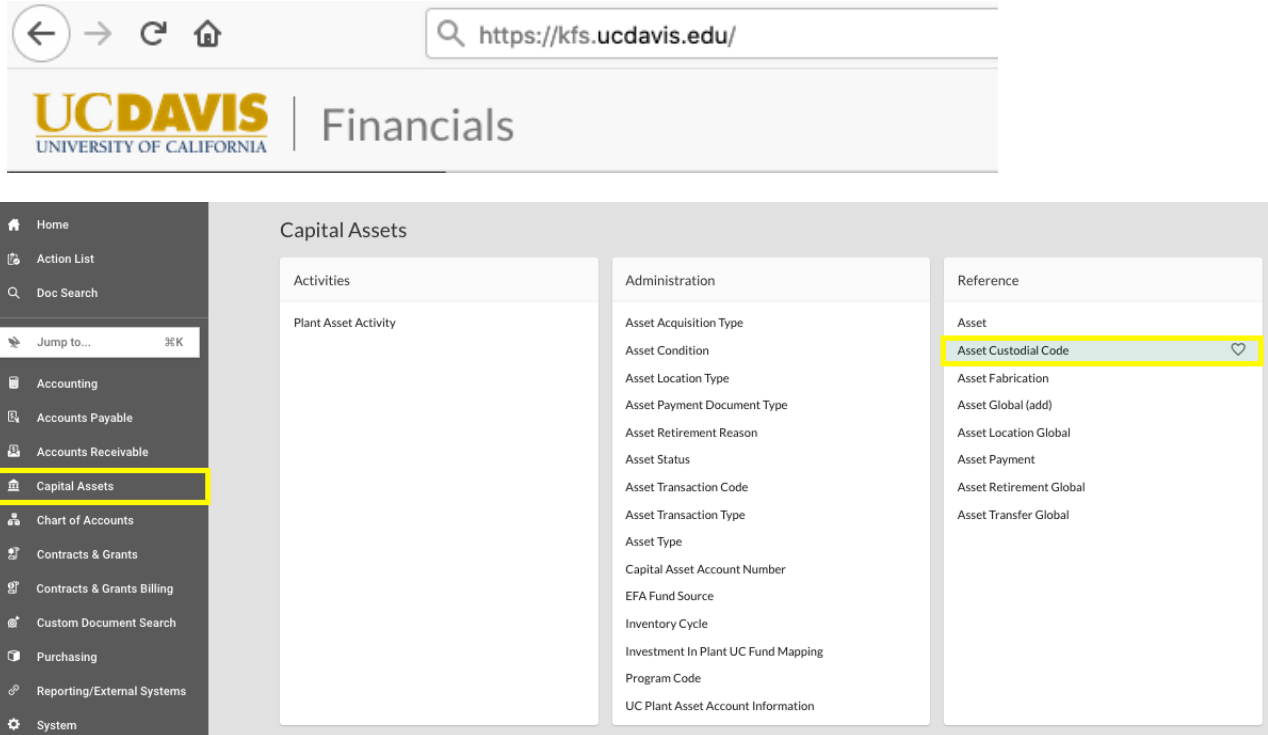


HOW TO MAKE CHANGES TO YOUR CUSTODIAL CODE

Updated on 04/08/21

From the KFS Main Menu, select Capital Assets > *Asset Custodial Code*:



Type in the custodial code you wish to makes changes to and then click *search*:

Custodial Code:

Custodial Description:

Asset Representative:

Asset Delegate:

Organization Owner Chart Of Accounts:

Organization Owner Account Number:

Organization Owner Organization Code:

Department Head:

Department Delegate:

UC Sub Location Code:

Active?: Yes No Both

Click on *edit*.

Actions	Custodial Code
edit	0128

Every document in Kualu requires a 40 character or less “description.”

DOCUMENT OVERVIEW ^

OVERVIEW

* Description: Explanation:

Organization Document Number:

This is like the “subject header” of an email – it is what other approvers will see in their KFS inbox and what other KFS users would see if they searched for your document. The description is a searchable field as well, so you are encouraged to spell correctly and put information that will either identify the purpose of the document or identify the asset. Some examples for documents in general are:

Update Asset Rep for Custodial Code 1234
Update Owner’s Acct for Cust Code 1234

The current information will be on the left hand side of the document; your changes will be done on the right hand side.

The information you are allowed to amend will be in a white box; anything not in a white box is not amendable by the department.

Changes that the department is allowed to make are:

- Custodial Description (name of the custodial code)
- Asset Rep
- Department Head
- Department Head Delegate
- Organization Owner Chart of Accounts
- Organization Owner Account Number
- UC Sub Location Code
- Asset Delegate (including Effective Start and End dates)

Custodial Code:	[REDACTED]
* Custodial Description:	[REDACTED]
* Asset Representative:	[REDACTED]
Department Head:	[REDACTED]
Department Delegate:	[REDACTED]
* Organization Owner Chart Of Accounts:	[REDACTED]
* Organization Owner Account Number:	[REDACTED]
Inventory Cycle Type Code:	[REDACTED]
Last Inventory Certification:	[REDACTED]
Program Code:	[REDACTED]
UC Sub Location Code:	1 - Campus
Active?:	Yes

* Asset Delegate:	[REDACTED]
* Effective Start Date:	[REDACTED]
Effective End Date:	[REDACTED]

ADD

Please Note: adding an Asset Delegate also requires you to click on *Add* (seen above).

Changes EQ would need to make for you:

- Custodial Code number
- Inventory Cycle Code
- Program Code
- Active Indicator

Please note: if your custodial code has a blank after “Program Code” you will need to contact EQ to have that filled in before being able to proceed with any changes to your custodial code.

If you have any notes or attachments, add them in the tab indicated:

NOTES AND ATTACHMENTS (0)

NOTES AND ATTACHMENTS (0)

Please DO NOT attach documents with Personal Identification Information (PII) or Protected Health Information (PHI). For more information, please review the following website: <https://cloud.ucdavis.edu/data-types-list>. Vendor W-9 attachments must be submitted via the inline update form: <https://supplychain.ucdavis.edu/procure-contract/w-9-upload>

Note Text:

Attachment:

 No file selected.

Remove Attachment

ADD

Once you have made the desired changes to your code, click on *Submit*