Completing the Capital Asset Tab on Requisitions

**Overview:** The Capital Asset tab of a purchase requisition needs to be completed if capital asset object codes are included in the eDoc to convey essential information about the asset to the Capital Asset Management (CAM) team.

1. After adding equipment to the Items tab in a requisition and completing the associated Accounting Line(s) with a capital asset object code, navigate to the Capital Asset tab and select Show.

2. Select the appropriate **Capital Asset System Type** from the first dropdown menu. The selected option will signal to CAM how many asset records are needed.
   a. Individual Assets: each line with a capital asset object code will be a separate asset
   b. Multiple Systems: multiple lines with a capital asset object code will combine to create multiple asset systems
   c. One System: multiple lines with a capital asset object code will combine to create one asset system

3. Select the appropriate **Capital Asset System State** from the second dropdown menu.
   a. Modify Existing: purchases should be added to an existing asset record
      i. This is most common with fabrications
   b. New System: purchases will require the creation of new asset record(s)

4. Click the Select button under the Action category.
   a. **Note:** if a capital asset object code was not included in the Accounting Line(s) above, an error will appear stating “No items were found that met the requirements for Capital Asset data collection.”
5. Complete the resulting section entitled **Capital Asset Items** and then click **add**.
   a. **Capital Asset Note Text**: Notes to assist CAM in accurately creating or updating the asset record(s), such as notes on how to apply the line items or account number of the unit that will be responsible for annual inventory of the asset (if different than the purchasing department; common for assets purchased on TLE account or project)
      i. **Note**: details and files can also be added to the Notes and Attachments tab of the requisition. Please indicate in the Capital Asset Note Text box what Notes and Attachments lines should be referenced by the CAM team.
   b. **Asset Type**: category code used to describe asset and to determine depreciable life
   c. **Location**: physical location of the asset upon receipt