



## 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.

Capital Asset	▶ show
Payment Information	▶ show
Additional Institutional Info	▼ hide

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

Capital Asset System Type:	▼
Capital Asset System State:	Individual Assets
Action:	Multiple Systems
	One 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)

Capital Asset System State:	▼
Action:	Modify Existing System
	New System

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

Capital Asset hide

**System Selection**

Capital Asset System Type: Individual Assets

Capital Asset System State: New System

Action: change update view

**Capital Asset Items**

Item Line #	Item Type	Quantity	UOM	Catalog #	Commodity Code	Description	Unit Cost	Extended Cost	Restricted
Qty		1.00	EA			Tangible, moveable, equipment	5001.00	5001.00	No

hide Capital Asset

Capital Asset Transaction Type: NEW

Capital Asset Note Text: Enter information to assist in creating description for new asset record. If there are special instructions on how to apply line items to create assets; include here. (Lines 1-3 = Microscope 1; Lines 4-9 = Microscope 2; Lines 10-12 = Apply to asset#537922)

Receiving Outside of Current Fiscal Year: No select

Asset Type: 06000 search

Manufacturer: Brand of Microscope same as vendor

Model Number: X1234

**Location**

Item Quantity: 1.00

Campus: EL search

City: EAST LANSING

Building: 0133 search off campus

State: MICHIGAN

Address: 166 SERVICE RD

Postal Code: 48824

Room: search

Country: UNITED STATES

add