

## Existing Hardware Asset

Match on the Serial Number.

### All Assets

These are physical items of value including workstations, servers, other electronic items, and furniture.

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<input type="checkbox"/>	Name	Serial number	Asset type	Manufacturer	Model	Status
<input type="checkbox"/>	Laptop-XYZ	A23456	Laptop	Dell	Latitude	Purchased
<input type="checkbox"/>	MonitorTest	10000	Monitor			Purchased
<input type="checkbox"/>	Workstation_Test	00001	Workstation			Purchased

## Existing Hardware Purchase

To find this existing purchase record, we need to match on the PO Number and the Item number (PO Line Number). Also take note that the purchase type is set to **Hardware**.

Procurement / Purchases & Vendors / All Purchases

### Purchase Properties

New Dell Latitude

Purchase order [Copy to a new purchase](#) [Edit this purchase order](#)

Purchases on this purchase order: 1. Any changes to this purchase order will be made to all the purchases sharing it.

Purchase order no.: PO-5432 Purchase date: 7/1/2022

Vendor: Dell

#### Purchase details

Item: 1

Description: New Dell Latitude

Part no./SKU: Unrecognized

Purchase quantity: 1 Quantity per unit: 1

Effective quantity: 1

Publisher: None [Search](#)

Status: New Purchase type: Hardware

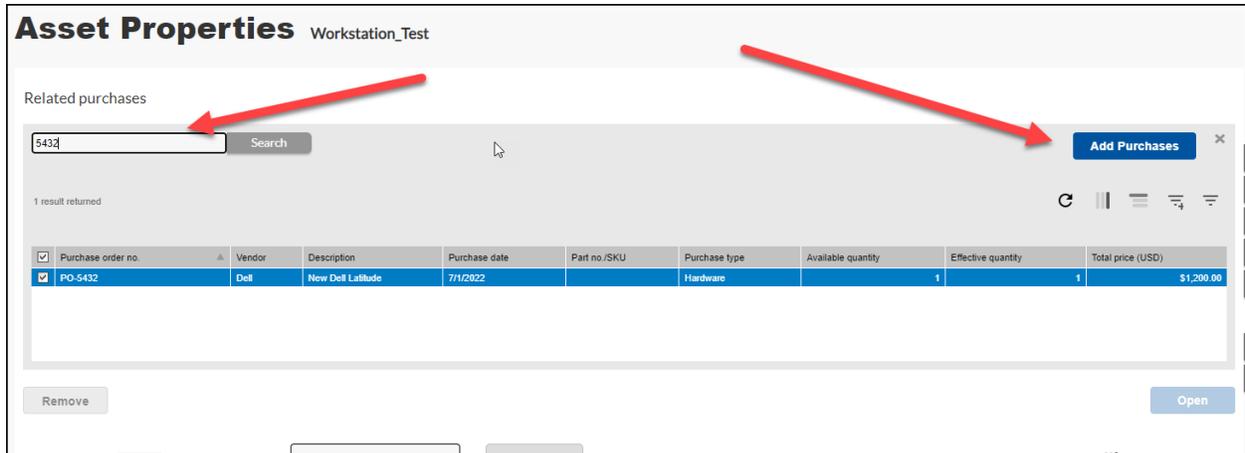
#### Related contract

Contract no.: None [Search](#)

Description: None

## Link Purchase to Asset - Manual

Go to the Purchase tab of the hardware asset. Search for the purchase using the PO Number, and then select it. Save the changes to link your existing purchase to the Hardware Asset.



## Link Purchase to Asset – Business Adapter

You will need a source of data that contains the data fields needed to find the existing Hardware Asset and the existing Purchase so that they can be linked together.

- ✓ Serial number of Hardware Asset
- ✓ PO Number
- ✓ PO Line/Item Number

For our example, we have an Excel spreadsheet that contains this information:

	A	B	C
	Serial Number	PO Number	Line Number
	A23456	PO-5432	1

## Example Adapter

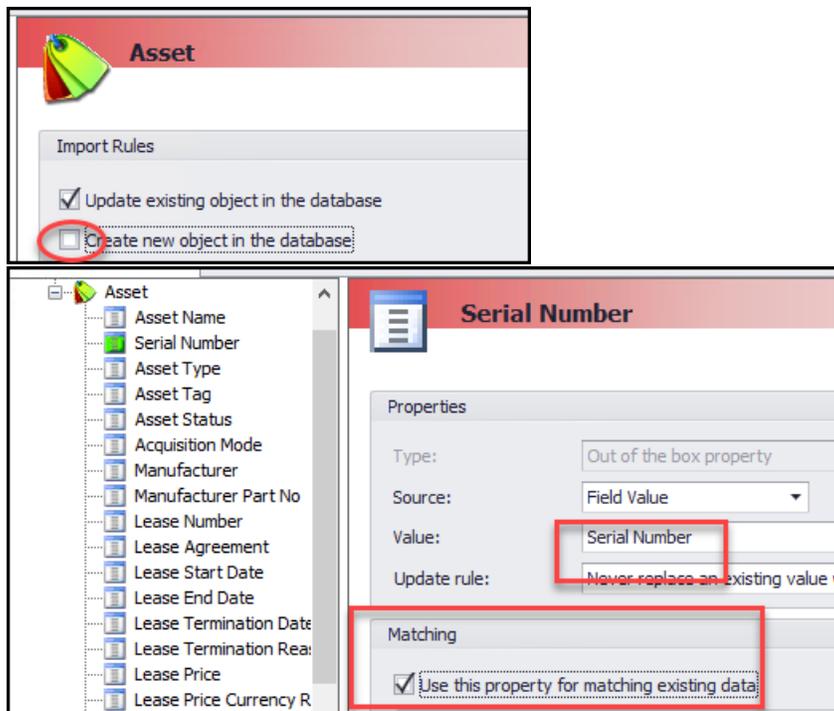
In this case, we have created a Business Adapter that reads the Excel spreadsheet and can see the data objects we need to map to within FNMS/ITAM.

This assumes you have some knowledge of how to create a Business Adapter and use an Excel spreadsheet as the data source. Once you have created the initial configuration of the adapter, you will then need to add the following data objects, in the following sequence.

The following example uses Flexera One ITAM, and the business adapter utility built into the ITAM Beacon. When creating the new business import, always start with the Custom Template so you have full flexibility in selecting only those ITAM data objects you need.

### Asset

Start with the Asset object. You don't want to accidentally create a new Asset if the serial number in your spreadsheet is not found, so remove the option to create a new Asset. Next, match on the Serial Number field from the spreadsheet to the Asset serial number field.



## Purchase Order

Next, add the Purchase Order object. Remove the option to create, and match on the Purchase Order Number from the spreadsheet.

Link Asset to PO.XML

- Link Asset to PO
  - Data
  - Asset
  - Purchase Order
    - Purchase Order No
    - Purchase Date
    - Vendor ID

### Purchase Order No

Properties

Type: Out of the box property

Source: Field Value

Value: PO Number

Update rule: Never replace an existing value with blank

Matching

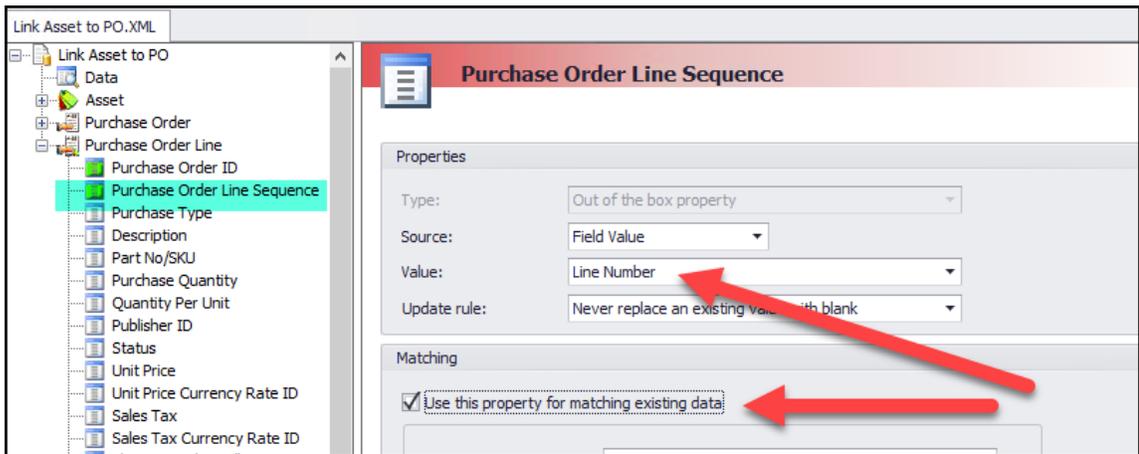
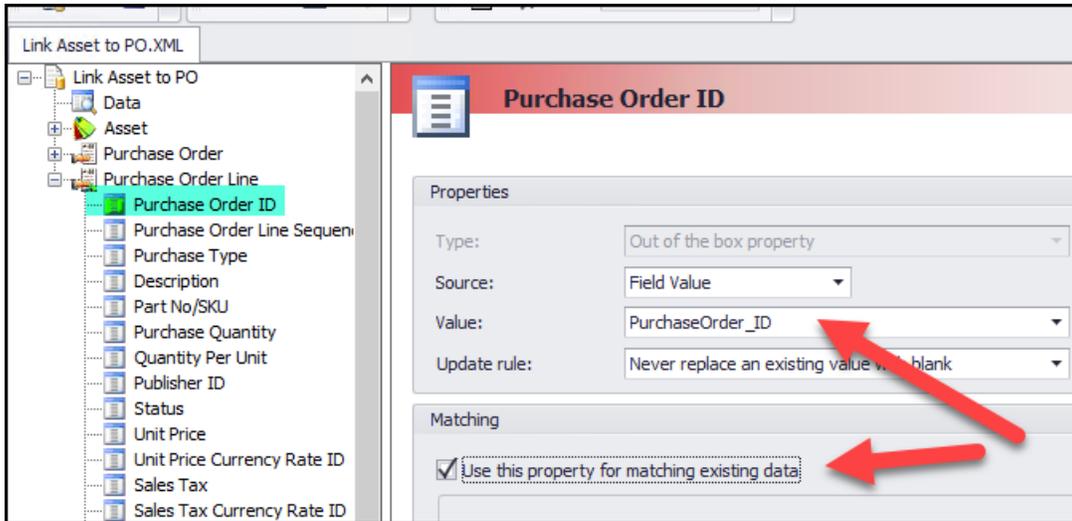
Use this property for matching existing data

If null value is found: Discard the record

Property pattern: [value]

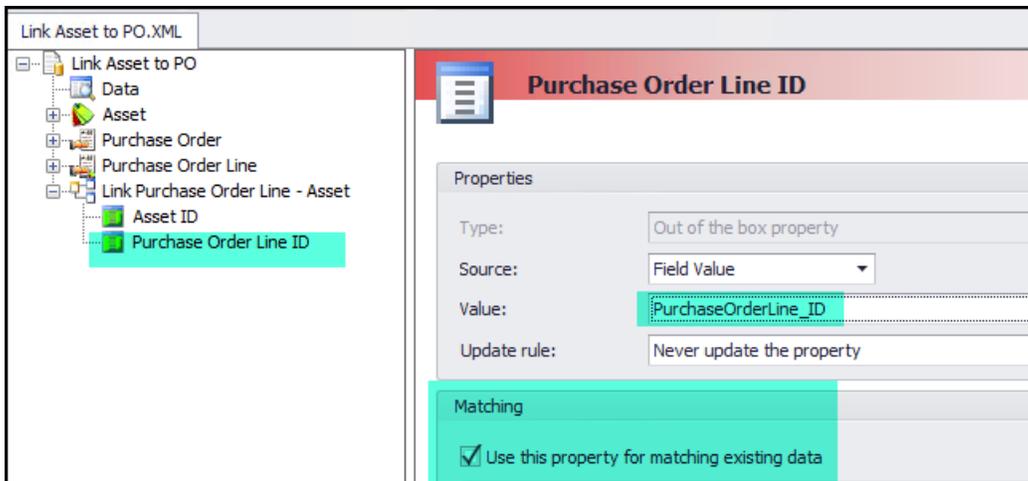
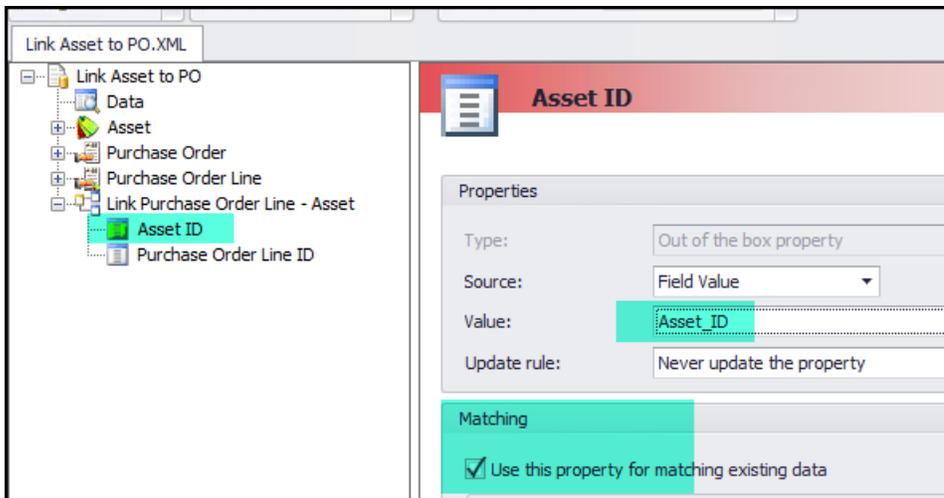
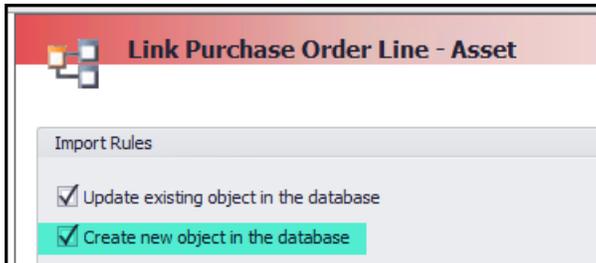
## Purchase Order Line

Next, add the Purchase Order Line object. You will want to match on the Purchase Order ID value from the Purchase object, and match on the Line Number from your spreadsheet. Since a purchase order can have multiple lines, you need to match on the unique combination of PO Number and Line Number.



## Link Purchase Order Line - Asset

We have now used the adapter to find the existing Hardware Asset and the existing PO Line. We can now use the relationship object named the Link Purchase Order Line-Asset to link the purchase to the asset. In this case, we do want to Create. We will need to match on the Asset ID and the Purchase Order Line ID.



## Run the Adapter

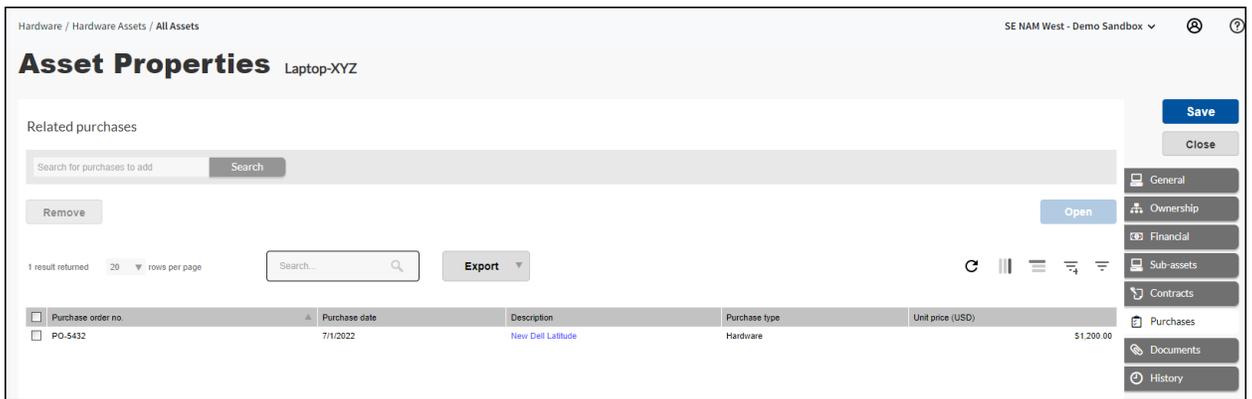
The adapter is now complete. Save the new adapter, update the beacon, and manually run the adapter from the beacon.

Within ITAM, you can watch the progress on the System Tasks page.

Task/Step	Task type	Start date	End date	Status	Summary
 <a href="#">Link Asset to PO</a>	Business import	11/8/2022 8:56:25 am	11/8/2022 8:56:42 am	 Completed	Asset - Matched = 1, Created = 0, Updated = 1, Rejected = 0 Asset/Computer - Matched = 0, Created = 0, Updated = 0, Rejected = 0 Purchase Order - Matched = 1, Created = 0, Updated = 1, Rejected = 0 Purchase Order Line - Matched = 1, Created = 0, Updated = 1, Rejected = 0 Link Purchase Order Line - Asset - Matched = 0, Created = 1, Updated = 0, Rejected = 0

## View the Asset, Verify the PO Line Link

Open the details of the Hardware Asset and on the purchases tab, you can see that the link has been created.



Hardware / Hardware Assets / All Assets SE NAM West - Demo Sandbox

### Asset Properties Laptop-XYZ

Related purchases

Search for purchases to add

1 result returned 20 rows per page

<input type="checkbox"/>	Purchase order no.	Purchase date	Description	Purchase type	Unit price (USD)
<input type="checkbox"/>	PO-5432	7/1/2022	<a href="#">New Dell Latitude</a>	Hardware	\$1,200.00

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