

IT Hardware Asset Management

Asset Record Entry in ServiceNow
A How-To Guide

Product Infrastructure Business Operations

Additional information

For additional information about this document or other documents in this series, contact:

Lin Laurie, Pi Business Operations

Intuit, Inc.

7535 Torrey Santa Fe Road

San Diego, CA 92129

(858) 215-8155

Version #	Implemented By	Revision Date	Approved By	Approval Date	Reason
1.0	<i>Lin Laurie</i>	<i>12/30/15</i>	Jen Martin	1/12/16	<i>Split from Asset Management Hardware Lifecycle into a role-based user guide.</i>

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Asset Record Entry in ServiceNow - Overview

High-level Overview: This document contains the daily procedures for asset management administrators or those taking over the process of creating asset record “stubs” so that lifecycle data (history, location, status, assignment, etc.), can be tracked for each tagged hardware asset Intuit purchases.

Daily POs update ServiceNow from Oracle via a scripted process. They are categorized by type and the AM team only works on Hardware Assets in this procedure.

These POs are separated into types, and each queue of types is processed. Each line item in the PO that is designated as a hardware asset is reviewed manually, and the model category and model are assigned to all asset records. These records then have their status changed to “Processed” and when the record is saved, they are no longer in the queue.

If the line item being reviewed is determined NOT to be a hardware asset, the item’s status is changed to Ignored so it will also leave the queue when saved.

If the item is determined to be software, the CATEGORYSEG1 field is changed to reflect that is IT Software instead of hardware, the record is saved, and it moves into the IT Software CATEGORYSEG1 queue for processing.

Responsibility:

- Asset Management Team

What You Need: Access to the following software:

- ServiceNow Hardware Asset Management module
- iProcurement (Oracle Purchasing component)
- [P2P Status Tool](#)

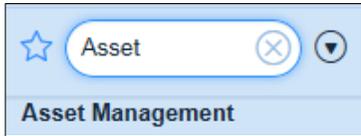
Timing

- Daily

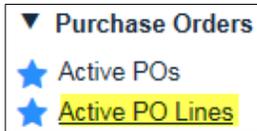
Creating a List of Hardware Open PO Line Items

To create a list of Hardware Assets to work out of a queue:

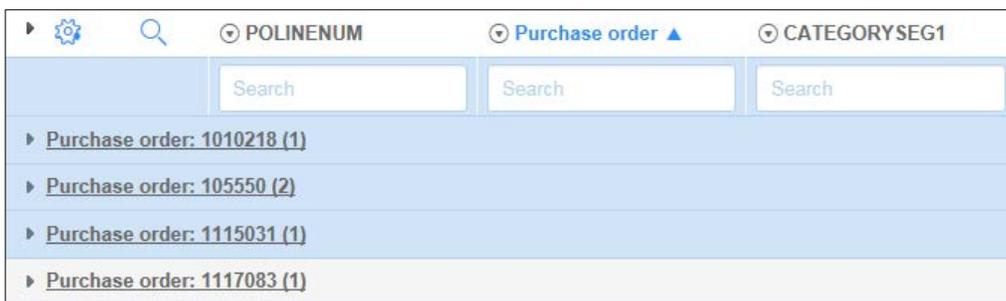
1. Log into ServiceNow at <https://intuitstage.service-now.com/>.
2. Enter “Asset” in the Filter to navigate to the Asset Management Module.



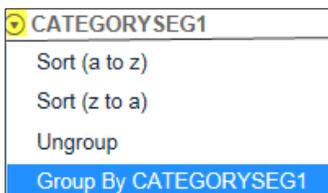
3. In the Purchase Orders section of the Asset Management module, click Active PO Lines.



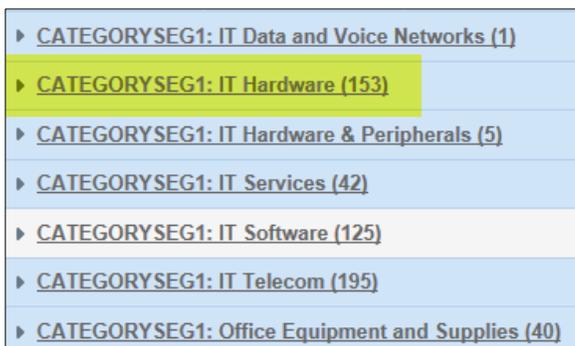
Once the list of purchase orders appears, you can sort them into purchase type (known as CATEGORYSEG1), and then select the each category and process or ignore line items depending on whether they are really hardware assets.



4. Click the down arrow to the left of CATEGORYSEG1, and select Group by CATEGORYSEG1.



5. From the category groups, click the IT Hardware category to open all the PO Lines that are for Hardware purchases.



Note: Because a hardware, software, maintenance, or support agreement could occur as part of any purchase order, we are also interested in reviewing the contents of these other categories as well. For instance, an active PO line can appear in a different category (such as IT Data and Voice Networks) because a hardware item was part of a larger purchase. Other items that will also show up in other

categories include purchases of hardware, software, support, or maintenance agreements. Focus on hardware first, and then go to the other queues and clear them out. You will change the Status code to Ignored if the PO line items do not apply to hardware as you view each of these category queues. See [Clearing Out Other Queues](#) for more information about processing items out of a queue when it is not a hardware asset.

Opening and Working with Active PO Lines

After opening the list of Active PO Lines from the IT Hardware category, (shown below), you will want to do the following:

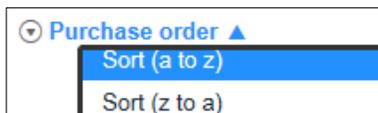
1. Sort them in Purchase Order number.
2. Review and process out of the queue, all active line items for one PO number-at-a-time.

The purpose is to open and create an asset “stub” record for each asset. For instance, if you purchase 5 servers, they may appear on one PO line, but during this process, you will cause ServiceNow to generate 5 stub records. We need this step to occur so that those records will be available once the items are received as they will be used to track each asset from time of receipt into an Intuit facility until time of disposal. These stub records are used to track the lifecycle of each asset.

	POLINENUM	Purchase order	CATEGORYSEG1	CATEGORYSEG2	ITEMDESCRIPTION
<input type="checkbox"/>	1	1188185	IT Hardware	Server Maintenance and Support	Quote#QT-218599, Sourcefire hardware sup...
<input type="checkbox"/>	6	1187028	IT Hardware	Network Routers and Switches	TSR, Request,Quote Number: 4020252.1,Par...
<input type="checkbox"/>	1	1188287	IT Hardware	Server Maintenance and Support	TSR Request ,Part # B41123, Orbit Pre-P...
<input type="checkbox"/>	24	406394	IT Hardware	Network Routers and Switches	TSR Request, Quote # 4069296.1 Par...

Note: Keep P2P application and TSR QuickBase open while performing this process so you can validate information as you’re working through the active PO Lines.

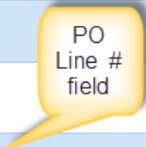
1. Sort your list in PO order by clicking the down arrow to the left of the Purchase Order field, and selecting Sort (a-z) so that you can work through an entire PO at a time.



You can also just click once on the Purchase Order title to sort in ascending order.



<u>6</u>	<u>1187028</u>	IT Hardware
<u>40</u>	<u>1187084</u>	IT Hardware
<u>1</u>	<u>1188185</u>	IT Hardware
<u>1</u>	<u>1188287</u>	IT Hardware
<u>1</u>	<u>1189840</u>	IT Hardware



- Click on the first purchase order line number to open it. (If you click on the PO number you will see the PO and not the line item details).

< PO Line - 6

Update
Save
Delete

<table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%;">POLINENUM</td> <td style="width: 50%;"><input type="text" value="6"/></td> </tr> <tr> <td>Purchase order</td> <td><input type="text" value="1187028"/></td> </tr> <tr> <td>Model category</td> <td><input type="text"/></td> </tr> <tr> <td>Model</td> <td><input type="text"/></td> </tr> <tr> <td>UNIQUEID</td> <td><input type="text" value="119,747"/></td> </tr> <tr> <td>PARTNUMBER</td> <td><input type="text"/></td> </tr> <tr> <td>SOURCEFILE</td> <td><input type="text" value="POLINES_062015_010035.XML34"/></td> </tr> <tr> <td>LINETYPE</td> <td><input type="text" value="Goods"/></td> </tr> </table>	POLINENUM	<input type="text" value="6"/>	Purchase order	<input type="text" value="1187028"/>	Model category	<input type="text"/>	Model	<input type="text"/>	UNIQUEID	<input type="text" value="119,747"/>	PARTNUMBER	<input type="text"/>	SOURCEFILE	<input type="text" value="POLINES_062015_010035.XML34"/>	LINETYPE	<input type="text" value="Goods"/>	<table style="width: 100%; border-collapse: collapse;"> <tr> <td>Status</td> <td><input type="text" value="Imported"/></td> </tr> <tr> <td>CATEGORYATTR1</td> <td><input type="text"/></td> </tr> <tr> <td>CATEGORYSEG1</td> <td><input type="text" value="IT Hardware"/></td> </tr> <tr> <td>CATEGORYSEG2</td> <td><input type="text" value="Network Routers and Switches"/></td> </tr> <tr> <td>UNITPRICE</td> <td><input type="text" value="\$ 6,080.00"/></td> </tr> <tr> <td>UNITOFMEASURE</td> <td><input type="text" value="Each"/></td> </tr> <tr> <td>QTYORDERED</td> <td><input type="text" value="24"/></td> </tr> <tr> <td>QTYRECEIVED</td> <td><input type="text" value="0"/></td> </tr> <tr> <td>SHIPMENTNUMBER</td> <td><input type="text" value="1"/></td> </tr> </table>	Status	<input type="text" value="Imported"/>	CATEGORYATTR1	<input type="text"/>	CATEGORYSEG1	<input type="text" value="IT Hardware"/>	CATEGORYSEG2	<input type="text" value="Network Routers and Switches"/>	UNITPRICE	<input type="text" value="\$ 6,080.00"/>	UNITOFMEASURE	<input type="text" value="Each"/>	QTYORDERED	<input type="text" value="24"/>	QTYRECEIVED	<input type="text" value="0"/>	SHIPMENTNUMBER	<input type="text" value="1"/>
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Update
Save
Delete

- Update the following fields:

Field	Description
Model Category	Select the category the hardware falls into from the list of selections. You may have to search for the original PO or use a quote or other backup material to locate this information. You might even need to Google the item description to figure out what it is. This field also limits what appears in the Model field below as selectable.
Model	Select the model for the asset. If you cannot find the model, you may have selected the wrong category. You can try to remove the model category and do a search on model first to find that it is in a different category from the one you thought it would be under.

More about Model Categories

We currently only use five model categories (although there are others listed in ServiceNow):

- **Computer** – Use this category for all monitors, TVs, tablets, laptops, and desktop devices.
- **Network Gear** – Use this category for video conferencing, network equipment, security appliances; all networking equipment.
- **Physical facility solutions** – Use this category to select power, racks, power distribution units (PDUs), and rack mount consoles, power conversion switches, and other facility-related devices.
- **Server** – Use this category for server purchases. Select this category for items such as Dell, Hewlett-Packard, Apple MP Server or Mac Pro, for example. Usually, (but not all) data center hardware purchases will fall under this category.
- **Storage Server** – Use this category for storage devices and other storage related devices. You can select this category for storage arrays, switches, blades, CleverSafe devices, some Dell devices, EMC devices, HP Disk Systems, Robots, StorageWorks, and NetApps for example.

Note: If you cannot find the correct Category, please use the procedure below, [“If You Can’t Figure Out How to Classify an Asset”](#) to contact the Asset team for assistance.

If you determine that the asset is Software instead of Hardware, see the process below called, [“For Software Instead of Hardware.”](#)

4. Click Save and the Status field will change to Processed.

Once you Save your work, ServiceNow will generate an asset “stub” record for each unit ordered so that once the units are received, they can be tagged and each asset tag can be entered and tracked within ServiceNow. So if 10 items were purchased, ServiceNow generates 10 stub asset records.

5. Scroll down to the Assets and then scroll to the right to verify that the location field (called Name) in each stub record is populated with the assigned location of the asset when it is received.

The screenshot shows the ServiceNow Assets table for PO line 1. The table has columns for Asset tag, Serial number, PO number, Model category, Assigned to, Model, and Display name. Five rows of stub records are visible, all with empty asset tags and PO number 1197014.

Asset tag	Serial number	PO number	Model category	Assigned to	Model	Display name
(empty)		1197014	Network Gear		2800 Series	Cisco Systems Inc 2800 Series
(empty)		1197014	Network Gear		2800 Series	Cisco Systems Inc 2800 Series
(empty)		1197014	Network Gear		2800 Series	Cisco Systems Inc 2800 Series
(empty)		1197014	Network Gear		2800 Series	Cisco Systems Inc 2800 Series
(empty)		1197014	Network Gear		2800 Series	Cisco Systems Inc 2800 Series

Status	Cost	Configuration Item	Created	Created by	Name
Ordered	\$6,370.00	2800 Series	01-14-2016 11:59:34 AM	llaurie1	Quincy (QCY)
Ordered	\$6,370.00	2800 Series	01-14-2016 11:59:30 AM	llaurie1	Quincy (QCY)
Ordered	\$6,370.00	2800 Series	01-14-2016 11:59:35 AM	llaurie1	Quincy (QCY)
Ordered	\$6,370.00	2800 Series	01-14-2016 11:59:32 AM	llaurie1	Quincy (QCY)
Ordered	\$6,370.00	2800 Series	01-14-2016 11:59:31 AM	llaurie1	Quincy (QCY)

- Once you see the location information in the Name field, click the right arrow at the upper left corner of the screen to leave the PO Line record and return to the list of PO line items and continue working through the list.

For Software Instead of Hardware

Sometimes you may find that an item is software but it is wrongly classified as Hardware. When this happens, you can change the CATEGORYSEG1 field to IT Software and save the record to move it into that queue for work by the Software Asset team. You can accomplish this in one of two ways:

- Change the CATEGORYSEG1 from the list form
- Change it from inside the Active PO Line record

To make the change from the PO Line List form:

- If you can tell while you are on the PO Line list screen, you can click on the line containing the mislabeled asset category and change it directly:

The screenshot shows a dropdown menu for 'CATEGORYSEG1' with the current value '=IT Hardware'. The dropdown list is open, showing 'IT Hardware' as the selected option. There are search and cancel buttons visible.

- Enter Software instead of Software, and then click the green check mark to save your work.

The screenshot shows the same dropdown menu for 'CATEGORYSEG1', but now 'IT Software' is selected. The green checkmark button is highlighted, indicating the change has been saved.

To make the change in the PO Line record:

- Open the PO Line item record.

The screenshot shows a form titled "PO Line - 6". The fields are as follows:

POLINENUM	<input type="text" value=""/>	Status	Imported
Purchase order	1187028	CATEGORYATTR1	<input type="text" value=""/>
Model category	<input type="text" value=""/>	CATEGORYSEG1	IT Hardware
Model	<input type="text" value=""/>	CATEGORYSEG2	Network Routers and Switches
UNIQUEID	119,747	UNITPRICE	\$ 6,080.00

2. Click inside the CATEGORYSEG1 field and make your change.

A close-up of the CATEGORYSEG1 field. The text "IT Software" is highlighted in yellow within the input box.

3. Click Save to keep your change and move the item to the correct queue.

Warning: You do not want to change the Status field or else it will not populate the queue that you changed it to.

If You Can't Figure Out How to Classify an Asset

Please don't guess about the Model Category and Model or if the Model doesn't exist, don't add it yourself.

If you cannot confidently classify a line item correctly, do not process the line item. Instead, send an email to the Asset Management distribution list (Assetmanagement2@intuit.com). Include the following information in your request:

1. The PO number.
2. The PO Line Item number.
3. Indicate the reason for the request.

Someone from our team will research the issue and process the record and will let you know what the resolution was to develop your skills in this area.

Clearing Out Other Queues

Sometimes people will purchase multiple items at the same time, such as a stapler and a taggable hardware device at the same time, especially when using their PCARD. For this reason, you need to review any other categories that show up in the CATEGORYSEG1 list. In the example below, ServiceNow lists all categories that contain line items with hardware in them. In the example below, notice that Hardware is shown in the CATEGORYSEG2 field. CATEGORYSEG1 is IT Services but there are four lines that need to be reviewed and evaluated to determine if they need asset tags and if they should generate stub records.

Purchase order	CATEGORYSEG1	CATEGORYSEG2 ▲	ITEMDESCRIPTION
1206059	IT Services	Hardware	TSR request , Quote# 714844654, Emulex L...
1206059	IT Services	Hardware	TSR request , Quote# 714844654, Broadcom...
1182904	IT Services	Hardware	TSR, 80" FLATSCREEN DISPLAYS MODEL-Sharp...
1205080	IT Services	Hardware	Outside services for Mint.com Customer C...

In the example above, PO 118904 is a flat screen display which should definitely be a tagged asset. The other items will require additional review.

To clear out each of the other Queues:

1. Open the Active PO Lines in the ServiceNow Asset Management’s Module, and group the PO lines by CATEGORYSEG1 as shown above in [Creating a List of Hardware Open PO Line Items](#).

▶ CATEGORYSEG1: IT Hardware (38)
▶ CATEGORYSEG1: IT Services (44)
▶ CATEGORYSEG1: IT Software (110)
▶ CATEGORYSEG1: IT Telecom (178)
▶ CATEGORYSEG1: Office Equipment and Supplies (23)

2. Select one of the remaining categories to open and work.
3. At the top of the screen, select CATEGORYSEG2 from the drop-down list, and then enter Hardware so it will group all hardware items at the top of the list.

Purchase order	CATEGORYSEG1	CATEGORYSEG2 ▲	ITEMDESCRIPTION
1206059	IT Services	Hardware	TSR request , Quote# 714844654, Emulex L...
1206059	IT Services	Hardware	TSR request , Quote# 714844654, Broadcom...
1182904	IT Services	Hardware	TSR, 80" FLATSCREEN DISPLAYS MODEL-Sharp...
1205080	IT Services	Hardware	Outside services for Mint.com Customer C...

4. Open each line (by clicking on the POLINENUM) and review each item to determine if it is a hardware asset.

5. If it is an item that needs to be tagged, then update the Model category and Model fields, and then click Save. The status will change to “Processed.” Check that the location (Name field) in the stub records is update, and then click the back arrow at the upper-left corner of the screen to return to the open line items and continue working through the items in the list.
6. Otherwise, change the Status to Ignored, and then click Update to save your work and return to the queue to continue to work it.
7. If the items are software, they will remain in the queue; otherwise, change the Status to Ignore, and then click Save with each record to process them out of the queue.

Troubleshooting Tips and Tricks

Determining Purchases

Sometimes it is difficult to determine what an item is based on the description entered into the Item Description fields. Here are some of the ways you can figure out an answer to that question in the order they are likely to be the most helpful.

Looking Up the PO in Oracle

If you need to find out more about the purchase, you can look up the purchase in Oracle by Requisition #, Purchase Order #, Supplier, or Requester.

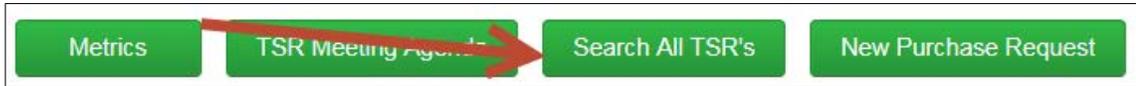
1. Open the [P2P Status Tool](#) (S2P).

2. Use the PO # or Requisition # to search for the item you want to learn more about, and then click Submit.
3. Follow the instructions provided by your own team on using this tool.
4. If you cannot process an Active PO Line item, see “[How to Classify an Asset.](#)”

Using the Technology Spend Request (TSR) QuickBase

The TSR contains information used to request approval for the purchase of much of the hardware purchased at Intuit. (Note: We expect that this QuickBase will be retiring in the end of FY16 Q2.)

1. Open the TSR QuickBase at <https://intuitcorp.quickbase.com/db/ba5vs8naj>.
2. Click the Search All TSR’s button.



3. Enter the search term (usually a part of the description of the item) in the Search box, and press Enter.



4. Review the results to find a match to the PO line you're trying to locate in ServiceNow and review the record by clicking the eye (on the left of the record you want to open).

	Date	Request Owner	Owner Manager/Director	Requested Product	\$ Amount	In Budget?	Company Number	PO Requestor	Purchase request approved by Finance
	05-22-2015	James, Mark A		NetBeez	\$25,000	YES	100	Mark James 7555 Torrey Santa Fe Rd San Diego CA 92129	✓

5. Scroll down through the TSR to the Vendor & Quote Information section, and open the attached quote.

Vendor & Quote Information

Vendor Name
NetBeez Inc

Original PO adding funds to: (if applicable)

Original Equipment Manufacturer (OEM)
NetBeez

Vendor Email Address
sales@netbeez.net

Quote attachment
Intuit - NetBeez Software License Quote #201505203.pdf  Revisions

- When you receive the message asking if you want to open or save the document, click Open to view it.

Do you want to open or save **Intuit - NetBeez Software License Quote _201505203.pdf** (637 KB) from **intuitcorp.quickbase.com**?

- Review the items in the quote and attempt to match them to the item in the PO line.

Quantity	Item	Unit List Price	Extended Price	% Discount	Unit Discounted	Total Price
1	NetBeez® - Central Server AMI	\$19,900.00	\$19,900.00	25.00%	\$14,925.00	\$14,925.00
27	NetBeez® - Agent FastE BEEZ	\$300.00	\$8,100.00	46.00%	\$162.00	\$4,374.00
27	NetBeez® - Agent WiFi BEEZ	\$420.00	\$11,340.00	50.00%	\$210.00	\$5,670.00
54	NetBeez® - Support and software updates annual contract	\$300.00	\$16,200.00	100.00%	\$0.00	\$0.00

- In this example we find that the dollar amount of the discounted item matches what is in the ServiceNow PO line for the Wi-Fi Agent so we know that this is software for the WIFI equipment. We can change the status of this item to Ignore and click Save to remove it from the queue.

Using Google to Search for Product Information

If you cannot figure out from the item description, category, or other field that is auto-populated when Oracle feeds the POs into ServiceNow, you can use information contained in the description field to look up the product.

In the example above, we searched for NetBeez; we can use the internet to do the same and locate their product page at <https://netbeez.net/product/>. Search through their list of products to match the products in the list to what is showing in the PO line. If you find a match here, you can stop looking, and go back into ServiceNow to complete entering the Model Number and Category information.

N B N E T B E E Z Home Product Solutions Resource

wired wireless external virtual

Specifications

NetBeez Central Server	On-Premise Virtual Appliance Cloud-Based Instance	
Wired BEEZ FastE	CPU: 700 Mhz ARMv6 RAM: 512 MB Disk drive: 8 GB Ethernet NIC: 10/100 Mbps (RJ-45) Power consumption: 3W AC 110V and 220V (External PSU) Dimensions (WxDxH): 2.5"x3.7"x1.2"	

Searching in ServiceNow

If you enter text in the search box without using any wildcards, the system performs the search for values greater than or equal to the value you enter. For text fields, this means that the search first sorts the records on the selected field, then finds the first record that starts with the text and all following records.

For example, if you want to find all models with names that start with “Cisco,” enter that in the search box and review the results.

Cisco Systems Inc 2300 Series Redundant Power Supply
Cisco Systems Inc 24-port Gigabit Switch SRW2024
Cisco Systems Inc 2800 Series
Cisco Systems Inc 2926 Catalyst Switch
Cisco Systems Inc 3600 Series Router
Cisco Systems Inc 3700 Series Multiservice Access Router
Cisco Systems Inc 3725/3745 Network Module - NM-16ESW
Cisco Systems Inc 4400 Series Wireless LAN Controller

Searching in Numeric Fields

For numeric fields, if you enter the number without wildcards, it brings up the item containing the number.

Display name ▲

3300

3com 3300 SuperStack II

3com Superstack II Hub

3com Total Control 1000 HiPer ARC NAC

Searching with Wild Cards

Using a wild card in front of the number gets you a better result.

Display name ▲

*3300

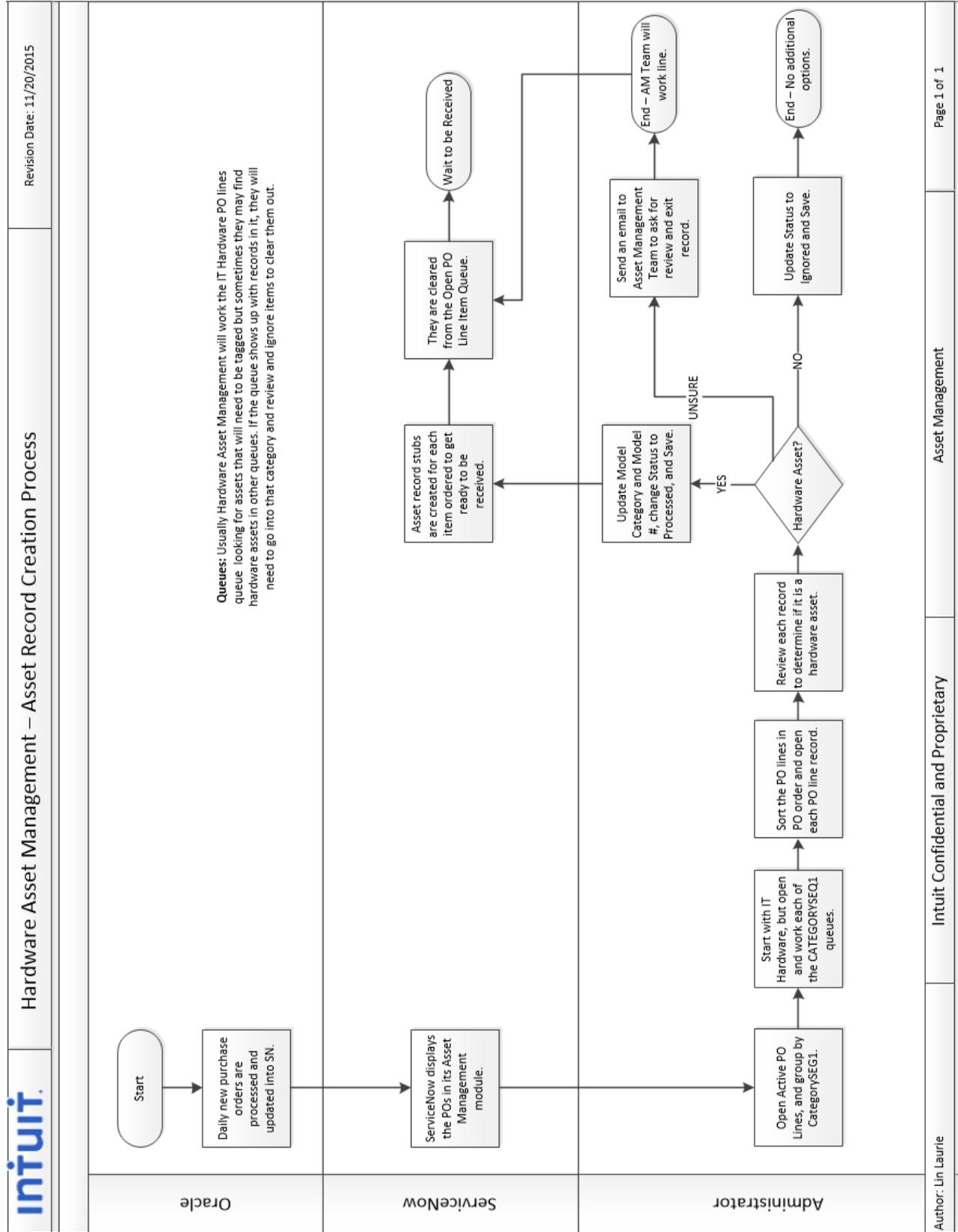
3com 3300 SuperStack II

Cisco Systems Inc Cisco 3300 Series Mobility Services Engine

You can use wildcards to refine your search. The following wildcards are available:

Example	Results
*searchterm or %searchterm%	Search for values that contain <i>searchterm</i>
%searchterm	Search for values that end with <i>searchterm</i>
searchterm%	Search for values that start with <i>searchterm</i>
=searchterm	Search for values that equal <i>searchterm</i>
!*searchterm	Search for values that do not contain <i>searchterm</i>
!=searchterm	Search for values that do not equal <i>searchterm</i>

Diagram of Asset Record Entry Process



Queues: Usually Hardware Asset Management will work the IT Hardware PO lines queue looking for assets that will need to be tagged but sometimes they may find hardware assets in other queues. If the queue shows up with records in it, they will need to go into that category and review and ignore items to clear them out.