GETTING STARTED WITH
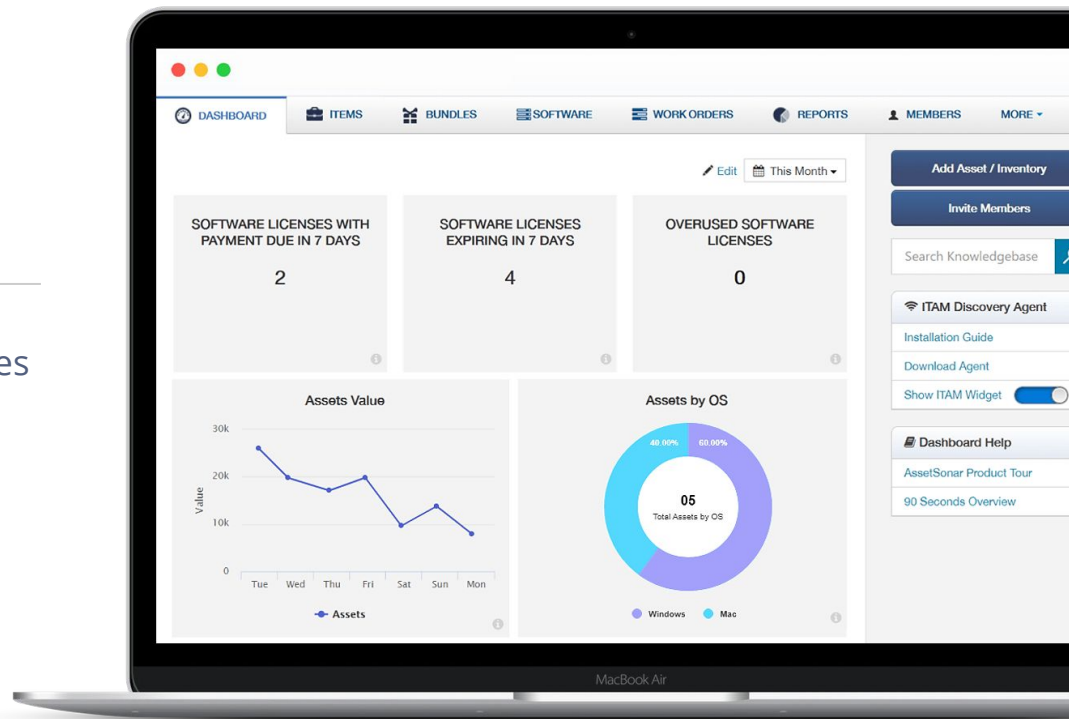
AssetSonar

Set up powerful IT Asset Management in minutes

assets nar

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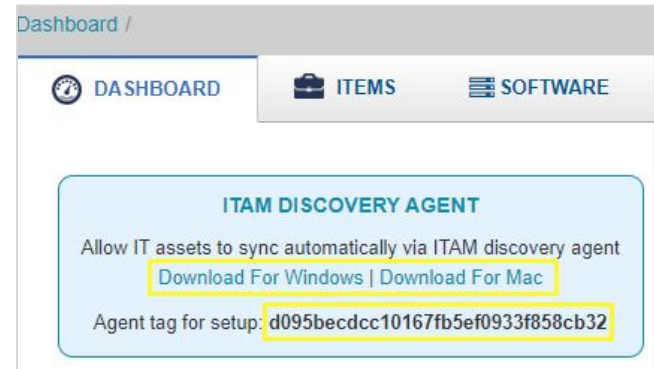
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① Add IT assets

AssetSonar uses an ITAM Discovery Agent to add IT assets to your account. To add your machine to AssetSonar:

1. Install the Windows or Mac agent setup file from the Dashboard.

2. Ensure your firewall isn't blocking the agent.

3. Launch the file and follow the on-screen instructions.

4. The setup will ask for a 'Tag value'. Get it from the ITAM Discovery Agent card under the Dashboard.

5. Agree to the license and complete the installation.

6. Finally, go to the Items Listings page and hit the 'Sync Now' button in the right panel.

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The 'Sync Now' button updates machine specifications for all agent-configured devices in AssetSonar.
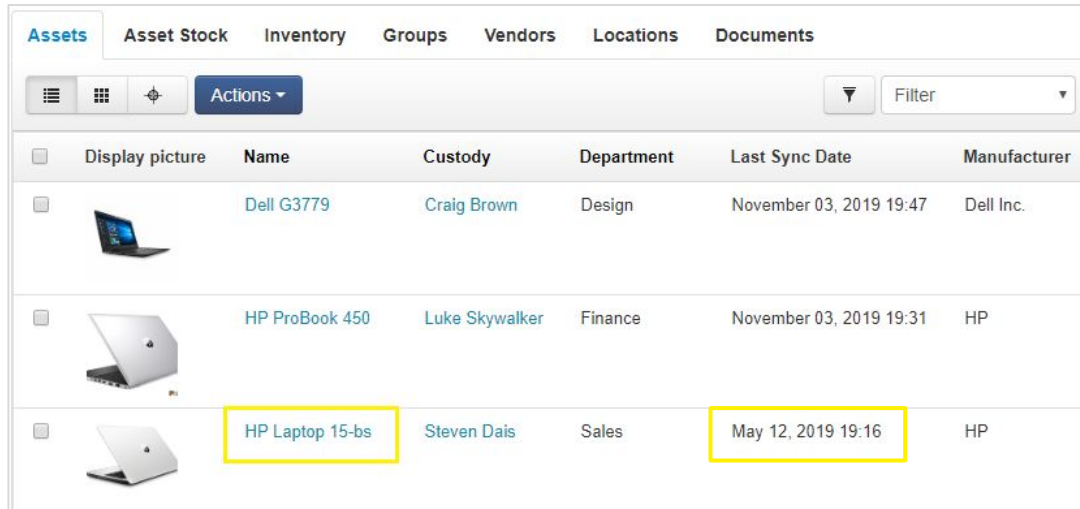
For more details, read our complete agent installation guide.

Want to speed up AssetSonar deployment across your organization? Our new ITAM Discovery Agent bypasses tag configuration so you can deploy it right away. Get in touch for access.

1 Once synced, the IT asset will be added to your AssetSonar account.
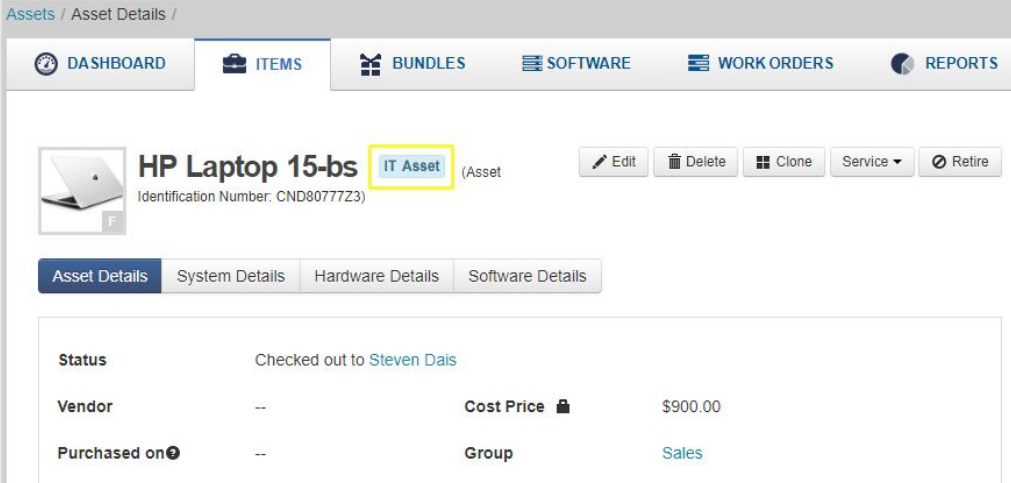
This item will now be accessible from *Items → Assets* where all the hardware assets show up. You can also see when the last sync took place for each IT asset.

1 To see hardware and software data for a device, head to its Item Details page.
Here, you'll be able to see the 'IT Asset' tag next to the Asset Name. This appears against all items scanned by the discovery agent.

Switch between the Asset Details, System Details, Hardware Details and Software Details tabs to view asset specifications.

1 The ITAM Discovery Agent automatically populates your device's software data in AssetSonar. Click on the 'Software Details' tab to view all software assets installed on this device.
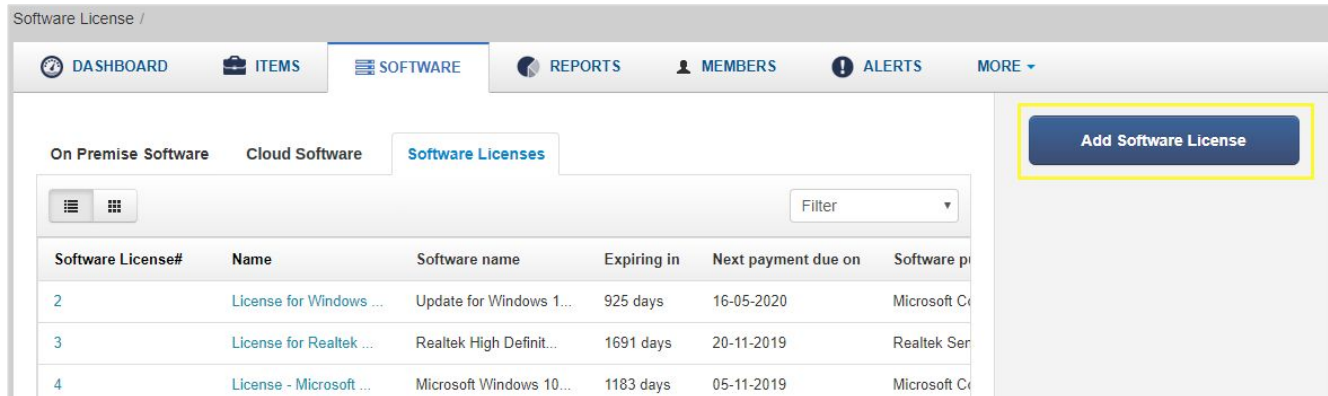
These will also be accessible from the Software module, where all discovered software assets from across the network are consolidated.

2   Add software licenses

AssetSonar's Software module also enables you to create and manage your software licenses.

To begin tracking a license, add it from *Software → Software Licenses → Add Software License.*

2

Start off by selecting the software application you're creating the license for.

Specify the Payment Frequency to track the license expense.

Select a Software Type (on premise/cloud).

Head on to specifying the license information.

Create Software License

Core Information

Software Name *	Adobe Illustrator 2019 ▼ (?)
Cost	19.99
Payment Frequency *	Monthly ▼
Software Category	Design ▼
Software Type	Installed Software ▼

2 Assign a License Type from the dropdown. Some of these types will further have License Options to indicate if they're counted per user or per machine.

Choose Start and End dates. These are critical in receiving timely alerts for expiries.

Select the 'Recur Indefinitely' checkbox for ongoing subscriptions that you don't have an end date for. Intended for subscriptions that you can cancel any time.

License Details

License Name *	Adobe Illustrator License
License Identification Number	AI-0432	ⅢⅢ Learn More
License Type *	Client Access License ▾
License Options *	Per Seat User ▾
Start Date *	11/04/2019
End Date *	12/04/2019
☐ Recur Indefinitely
Owner	Steven Dais ▾
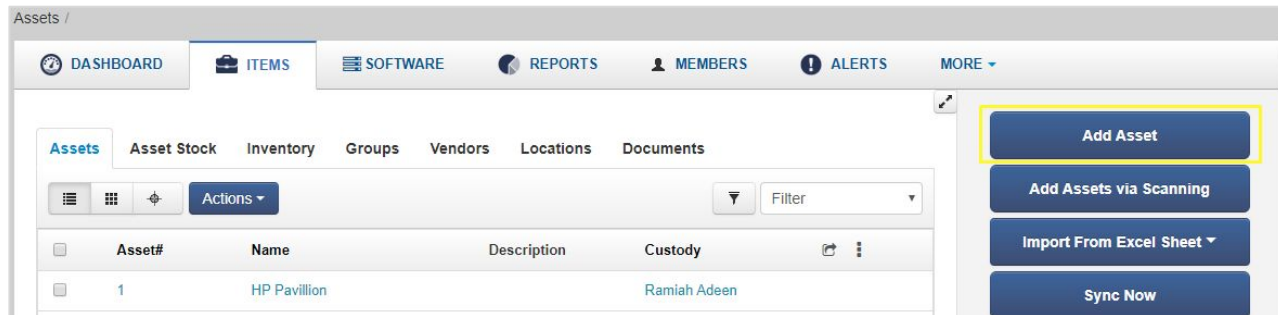
③ Add non-IT assets

Add non-IT assets to track peripherals and other office supplies.

1. **Assets:** Items that are individually checked out and tracked, like printers and projectors.

2. **Asset Stock:** Items that are checked out in bulk and aren't tracked individually, like cables.

3. **Inventory:** Items that are consumed once checked out, like memory cards and batteries.

To add non-IT assets, head to the Items module, and click on 'Add Asset'.

3 Begin by specifying a name for the asset. Then, fill in all data fields that are relevant to your needs, like item description and cost.

Create Custom fields for any additional data points, like battery voltage, by scrolling all the way down.
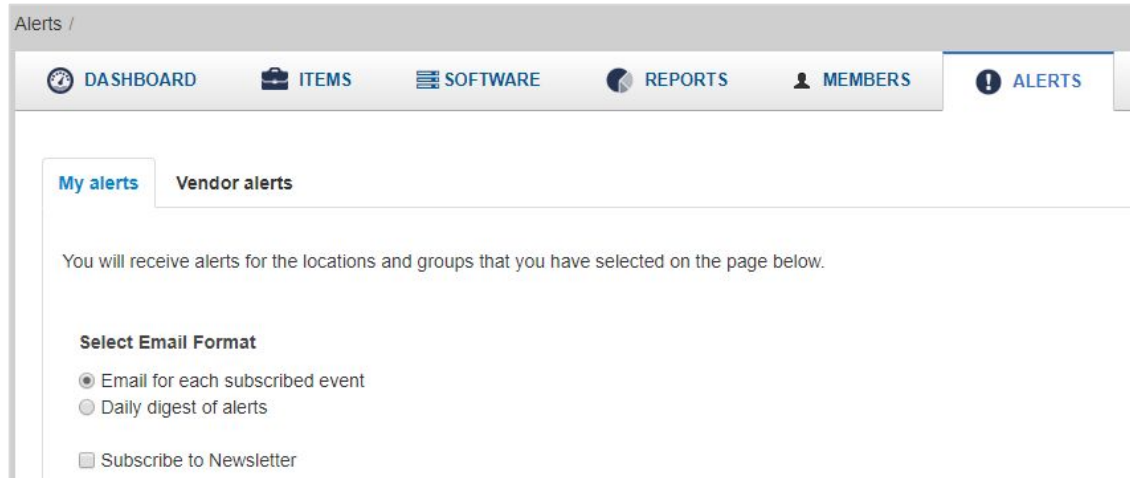
Note that new groups and vendors can be added when assigning to an asset. Once added, these will appear in *Items → Groups* and *Items → Vendors* respectively.

4 # Set up alerts

To be notified of upcoming events like license expiries, enable alerts from the Alerts module.

Choose whether to receive a daily digest of alerts once every day, or alerts for each individual event as they take place, like assets being checked out to an employee.

4 Enable software license alerts to learn of approaching expiries and payment due dates beforehand.

You can also specify how early you'd like to receive these two alerts.

Moreover, select the relevant checkboxes if you'd like to be notified of licenses becoming active, expiring, or terminating.

Software Licenses	
☑	License(s) Expiring in [15] days (?)
☑	Payment Due in [15] days (?)
☑	License(s) became Active today
☑	License(s) Expired today
☑	License(s) Terminated today

View meaningful IT metrics

5

The Dashboard gives you a complete overview of all your IT asset details. It consolidates all data points in one clean display so you can easily take actions like renewing licenses in a timely manner.
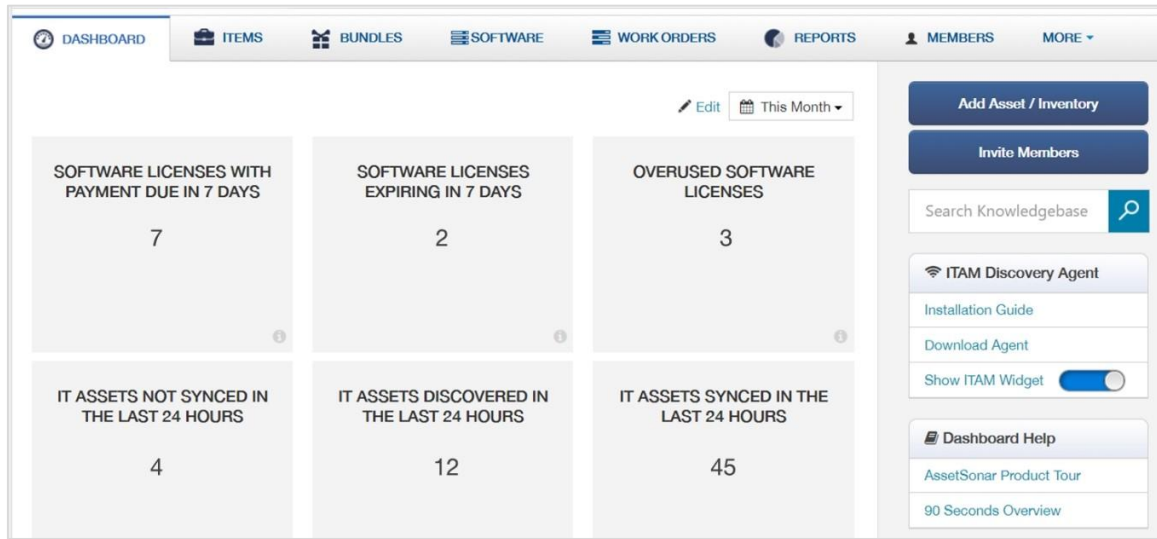
5

To select KPIs to show on your Dashboard, head to
Settings → My Settings → Dashboard Settings.

Here, select metrics that you'd like to see on the
Dashboard.

If you aren't sure what a certain metric means,
hover over the info icon next to it for more
information.

| Company Settings | Add Ons | **My Settings** | Billing |

Dashboard Settings

☑ Show KPIs/Metrics on dashboard
  ☑ Software Licenses with payment due in 7 days (?)
  ☑ Software Licenses expiring in 7 days (?)
  ☑ Overused Software Licenses (?)
  ☑ IT Assets Not Synced in the last 24 hours (?)
  ☐ IT Assets Discovered in the last 24 hours (?)
  ☐ IT Assets Synced in the last 24 hours (?)
  ☑ Underused Software Licenses (?)
  ☑ Software Licenses with payment due in 30 days (?)
  ☑ Software Licenses expiring in 30 days (?)
  ☑ Active Software Licenses (?)
  ☑ Expired Software Licenses (?)
  ☑ Number of IT Assets (?)
  ☐ Quantity of Asset Stock Reserved (?)
  ☐ Quantity of Asset Stock Checked Out (?)

Integrate with your service desk

Integrate your IT asset management with your Zendesk of Jira service desk to track all of your ITSM workflows. Here is how to set up Zendesk:

1. Head to *Settings → Add Ons → Integrate with Zendesk → Get the app at Zendesk.*

2. Provide your Zendesk subdomain and hit 'Connect'.

If you're installing the AssetSonar app from the Zendesk marketplace, you'll be asked to provide:

1. **An Access Token:** Get this from *Settings → Add Ons → API Integration* in AssetSonar.

2. **Your AssetSonar subdomain:** This is your AssetSonar URL; it looks like 'business.assetsonar.com'.

3. **Owner's email address:** This is the email address saved against the Account Owner in AssetSonar.

For more details, refer to the complete Zendesk and AssetSonar integration information.

FOR MORE HELP

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