

GETTING STARTED WITH AssetSonar

Set up powerful IT Asset Management in minutes



[Blog](#) | [Contact us](#)

The screenshot shows the AssetSonar dashboard interface running on a MacBook Air. The dashboard features a top navigation bar with links for DASHBOARD, ITEMS, BUNDLES, SOFTWARE, WORK ORDERS, REPORTS, MEMBERS, and MORE. On the left, there's a sidebar with options like Add Asset / Inventory, Invite Members, Search Knowledgebase, ITAM Discovery Agent, Installation Guide, Download Agent, and Show ITAM Widget (which is turned on). The main content area includes several key metrics and visualizations:

- Software Licenses with Payment Due in 7 Days:** 2
- Software Licenses Expiring in 7 Days:** 4
- Overused Software Licenses:** 0

Below these are two charts: "Assets Value" (a line graph showing asset value over a week) and "Assets by OS" (a donut chart showing the distribution of assets between Windows and Mac).

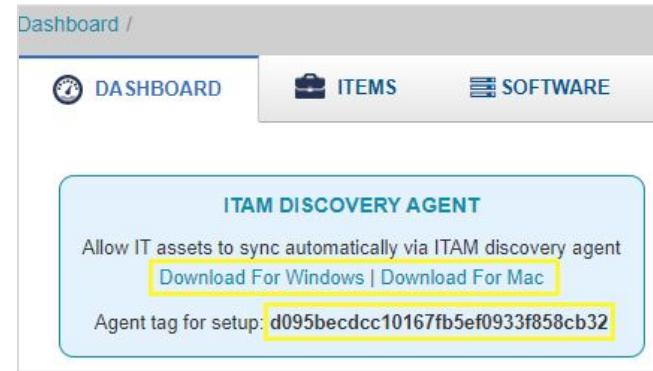
CONTENTS

1.	Add IT assets	1
2.	Add software licenses	6
3.	Add non-IT assets	9
4.	Set up alerts	11
5.	Integrate with your service desk	13
6.	View meaningful IT metrics	15

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.



1

The screenshot shows the AssetSonar software interface. At the top, there is a navigation bar with tabs: DASHBOARD, ITEMS (which is selected), BUNDLES, SOFTWARE, WORK ORDERS, REPORTS, MEMBERS, and MORE. Below the navigation bar is a sub-menu for 'Assets' with options: Assets, Asset Stock, Inventory, Groups, Vendors, Locations, and Documents. There is also a 'Actions' dropdown and a 'Filter' search bar. The main content area displays a table with columns: Display picture, Name, Custody, Department, Last Sync Date, and Manufacturer. A single row is shown for a Dell G3779 asset, which is currently in the Design department. On the right side of the screen, there is a sidebar with buttons for 'Add Asset', 'Import From Excel Sheet', and 'Sync Now'. The 'Sync Now' button is highlighted with a yellow box. Below the sidebar is a search bar for the Knowledgebase.

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.

	Display picture	Name	Custody	Department	Last Sync Date	Manufacturer
<input type="checkbox"/>		Dell G3779	Craig Brown	Design	November 03, 2019 19:47	Dell Inc.
<input type="checkbox"/>		HP ProBook 450	Luke Skywalker	Finance	November 03, 2019 19:31	HP
<input type="checkbox"/>		HP Laptop 15-bs	Steven Dais	Sales	May 12, 2019 19:16	HP

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.

The screenshot shows the 'Assets / Asset Details /' interface. At the top, there are tabs: DASHBOARD (selected), ITEMS (highlighted with a yellow box), BUNDLES, SOFTWARE, WORK ORDERS, and REPORTS. Below the tabs, there's a thumbnail of an HP laptop and the asset name 'HP Laptop 15-bs'. To the right of the name is a blue box labeled 'IT Asset' with a yellow border. Below the name, it says '(Asset)' and 'Identification Number: CND80777Z3'. To the right of the asset name are several buttons: Edit, Delete, Clone, Service ▾, and Retire. Below these buttons is a navigation bar with tabs: Asset Details (selected, highlighted with a blue box), System Details, Hardware Details, and Software Details. Under the Asset Details tab, there are four data rows:

Status	Checked out to Steven Dais		
Vendor	--	Cost Price	\$900.00
Purchased on	--	Group	Sales

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.

The screenshot shows the AssetSonar interface for an asset named 'HP Laptop 15-bs'. The top navigation bar includes links for DASHBOARD, ITEMS, SOFTWARE (which is selected and highlighted in blue), REPORTS, MEMBERS, ALERTS, and MORE. Below the navigation is a summary card for the laptop, showing its name, status as an IT Asset, identification number CND80777Z3, and several action buttons: Edit, Delete, Clone, Service, and Retire. Below the card are tabs for Asset Details, System Details, Hardware Details, and Software Details, with the Software Details tab being the active one and highlighted with a yellow box. A table then lists the installed software: WinRAR 5.61 (32-bit) version 5.61.0 by win.rar GmbH, WildTangent Helper version 1.0.0.300 by WildTangent, and WildTangent Games version 1.1.1.19 by WildTangent. To the right of the table is a vertical column of blue buttons with white text: Add to Cart, Replace Asset in Carts, Print Label, Checkin, Extend Checkout, Request Audit, and Reserve.

Software Name	Version	Manufacturer	Installation Date
WinRAR 5.61 (32-bit)	5.61.0	win.rar GmbH	
WildTangent Helper	1.0.0.300	WildTangent	
WildTangent Games	1.1.1.19	WildTangent	

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*.

The screenshot shows the AssetSonar Software Licenses page. At the top, there is a navigation bar with tabs: DASHBOARD, ITEMS (selected), SOFTWARE, REPORTS, MEMBERS, ALERTS, and MORE. Below the navigation bar, there are three categories: On Premise Software, Cloud Software, and Software Licenses (which is selected). A yellow box highlights the 'Add Software License' button. To the left of the table, there are two view mode icons (grid and list) and a 'Filter' dropdown. The table lists four software licenses with columns: Software License#, Name, Software name, Expiring in, Next payment due on, and Software p. The data is as follows:

Software License#	Name	Software name	Expiring in	Next payment due on	Software p
2	License for Windows ...	Update for Windows 1...	925 days	16-05-2020	Microsoft Co
3	License for Realtek ...	Realtek High Definit...	1691 days	20-11-2019	Realtek Ser
4	License - Microsoft ...	Microsoft Windows 10...	1183 days	05-11-2019	Microsoft Co

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 * (?)

Cost

Payment Frequency *

Software Category

Software Type

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 Learn More
License Type *	Client Access License
License Options *	Per Seat User
Start Date *	11/04/2019
End Date *	12/04/2019
<input type="checkbox"/> 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'.

The screenshot shows the 'Assets /' interface with the 'ITEMS' tab selected. The main area displays a table with columns: Asset#, Name, Description, and Custody. One row is visible with Asset# 1, Name HP Pavilion, and Custody Ramiah Adeen. To the right of the table is a sidebar with four buttons: 'Add Asset' (highlighted with a yellow box), 'Add Assets via Scanning', 'Import From Excel Sheet', and 'Sync Now'.

Asset#	Name	Description	Custody
1	HP Pavilion		Ramiah Adeen

Add Asset

Add Assets via Scanning

Import From Excel Sheet

Sync Now

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.

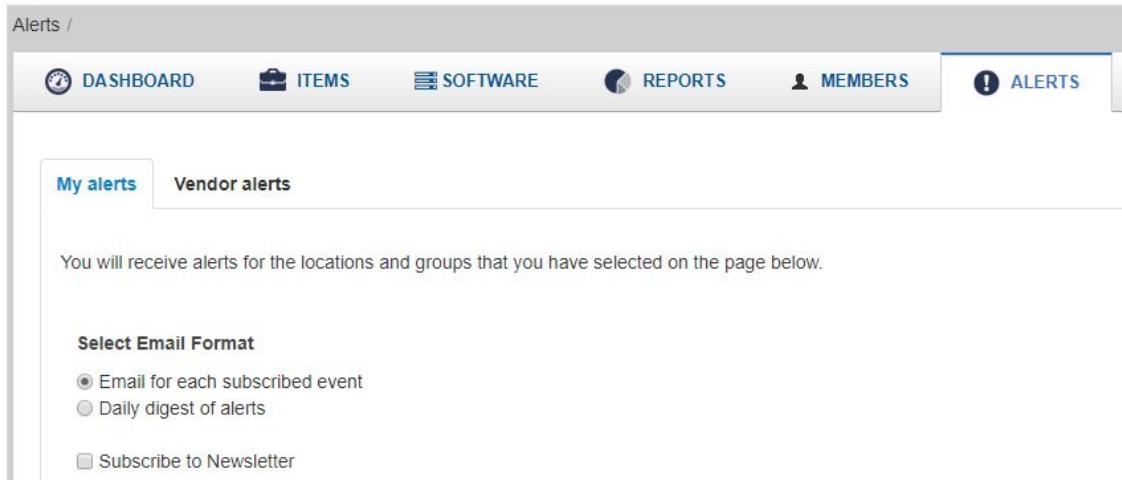
Note that new [groups](#) and vendors can be added when assigning to an asset. Once added, these will appear in *Items → Groups* and *Items → Vendors* respectively.

The screenshot shows a software interface titled 'Assets / New /'. At the top, there is a navigation bar with tabs: DASHBOARD (selected), ITEMS (highlighted in blue), SOFTWARE, REPORTS, and MEMBERS. Below the navigation bar, the title 'Create Asset' is displayed, followed by a section header 'Core Information'. The form contains the following fields:

Name *	HP OfficeJet Pro
Product model number	9015
Group *	Printers ▾ Add Add Subgroup
Identification Number	23
Description	All-in-one printer. Supports printing, copying, scanning, faxing.

Set up alerts

To be notified of upcoming events like license expiries, enable alerts from the [Alerts module](#).



The screenshot shows the 'Alerts /' page with a navigation bar at the top featuring links for DASHBOARD, ITEMS, SOFTWARE, REPORTS, MEMBERS, and ALERTS. The ALERTS link is highlighted with a blue border. Below the navigation bar, there are two tabs: 'My alerts' (selected) and 'Vendor alerts'. A message below the tabs states: 'You will receive alerts for the locations and groups that you have selected on the page below.' Under the heading 'Select Email Format', there are three options: 'Email for each subscribed event' (radio button selected), 'Daily digest of alerts' (radio button unselected), and 'Subscribe to Newsletter' (checkbox unselected).

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.

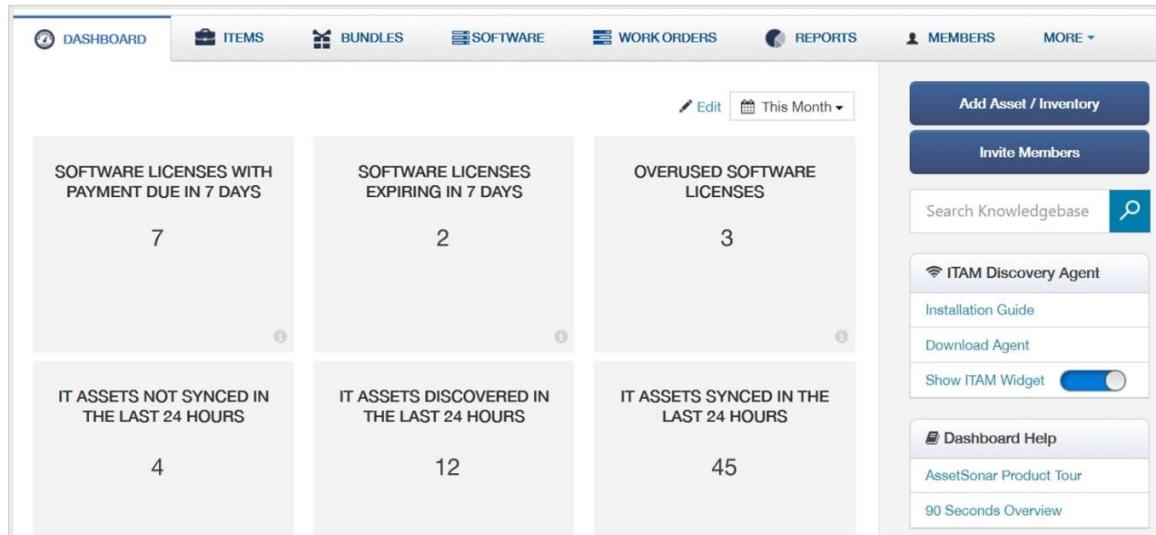
Moreover, select the relevant checkboxes if you'd like to be notified of licenses becoming active, expiring, or terminating.

Software Licenses	
<input checked="" type="checkbox"/>	License(s) Expiring in <input type="text" value="15"/> days (?)
<input checked="" type="checkbox"/>	Payment Due in <input type="text" value="15"/> days (?)
<input checked="" type="checkbox"/>	License(s) became Active today
<input checked="" type="checkbox"/>	License(s) Expired today
<input checked="" type="checkbox"/>	License(s) Terminated today

5

View meaningful IT metrics

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.

The screenshot shows a navigation bar with tabs: Company Settings, Add Ons, My Settings (which is selected and highlighted in blue), and Billing. Below the navigation bar is a section titled 'Dashboard Settings'. This section contains a list of checkboxes for selecting metrics to display on the dashboard. Some checkboxes are checked (indicated by a blue checkmark) and others are unchecked (indicated by a grey square). A yellow box highlights the checkbox for 'Software Licenses with payment due in 7 days (?)'. The list includes:

- 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 or 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

⊕ blog.assetsonar.com

✉ support@assetsonar.com

☎ +1 888 623 8654

