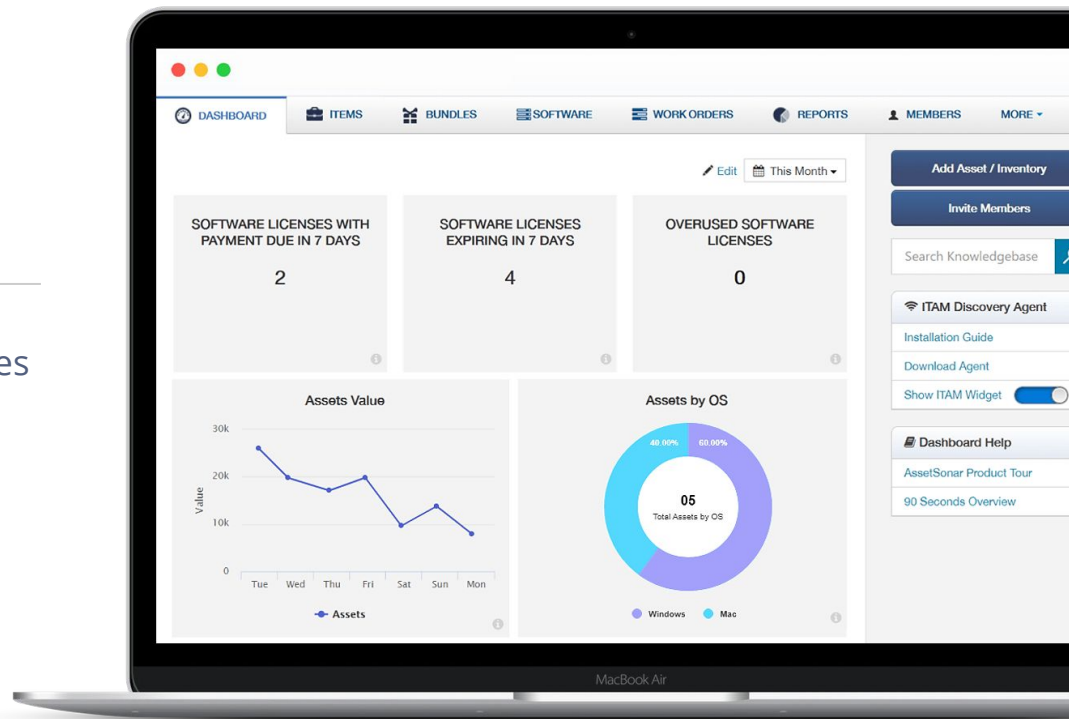


GETTING STARTED WITH AssetSonar

Set up powerful IT Asset Management in minutes



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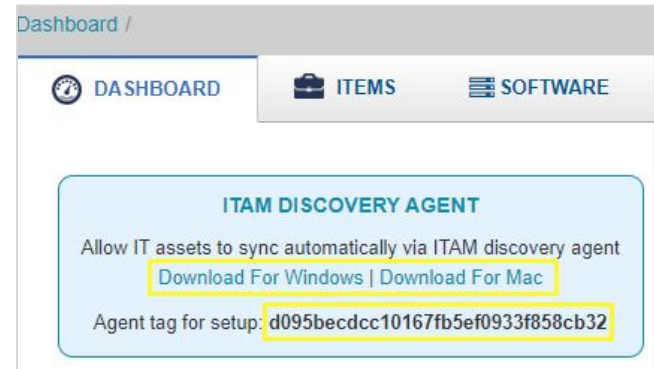
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1 Add IT assets


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.



1

The screenshot shows the AssetSonar web interface. At the top, there is a navigation bar with tabs for DASHBOARD, ITEMS, BUNDLES, SOFTWARE, WORK ORDERS, REPORTS, MEMBERS, and MORE. Below this, there is a sub-navigation bar with tabs for Assets, Asset Stock, Inventory, Groups, Vendors, Locations, and Documents. The main content area displays a table of assets. The table has columns for Display picture, Name, Custody, Department, Last Sync Date, and Manufacturer. One asset is listed: Dell G3779, Custody: Jerry Qur, Department: Design. To the right of the table, there are three buttons: Add Asset, Import From Excel Sheet, and Sync Now. The Sync Now button is highlighted with a yellow border. Below these buttons is a search bar labeled 'Search Knowledgebase'.

Display picture	Name	Custody	Department	Last Sync Date	Manufacturer
	Dell G3779	Jerry Qur	Design		

The 'Sync Now' button updates machine specifications for all agent-configured devices in AssetSonar.

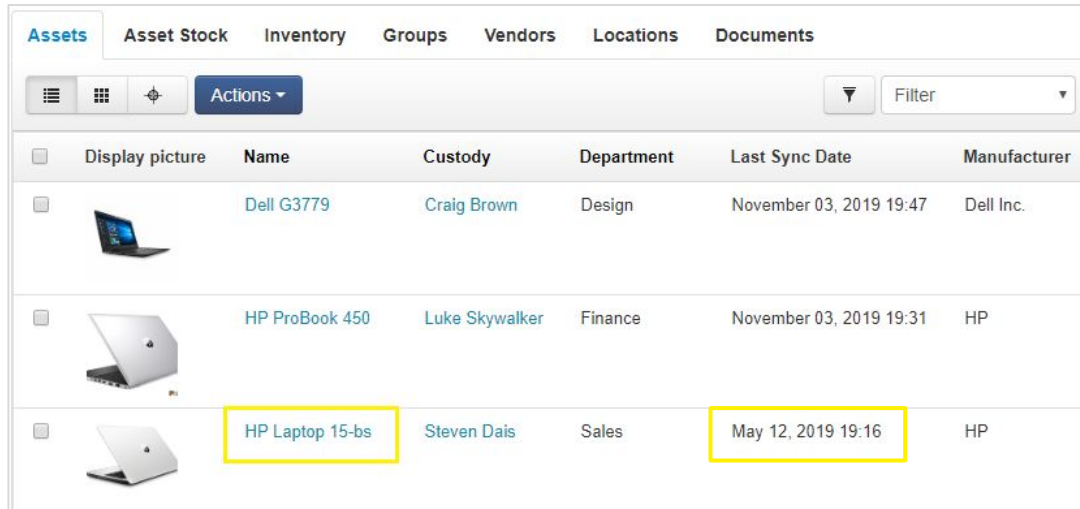
For more details, read our [complete agent installation guide](#).




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.

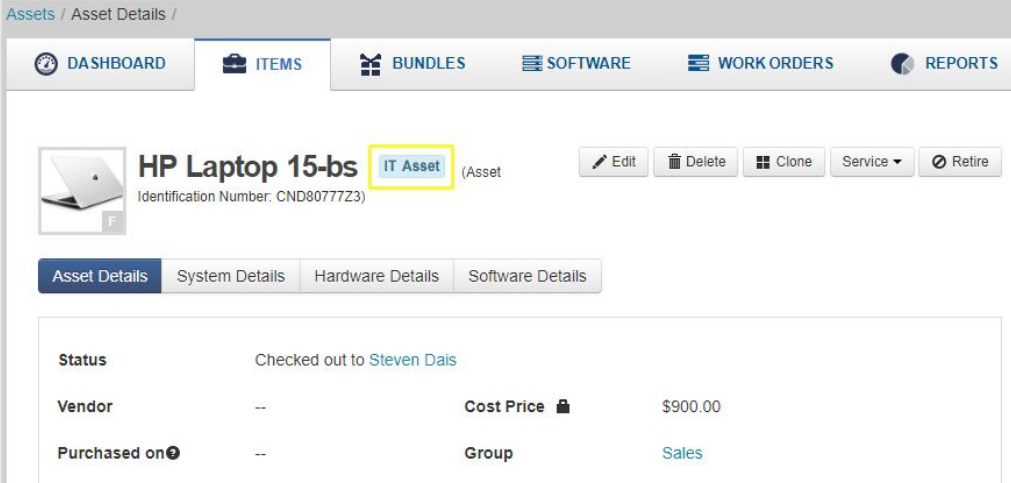
This item will now be accessible from *Items* → *Assets* where all the hardware assets show up. You can also see when the last sync took place for each IT asset.



<input type="checkbox"/>	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.





Assets / Asset Details /

DASHBOARD ITEMS BUNDLES SOFTWARE WORK ORDERS REPORTS

 **HP Laptop 15-bs** IT Asset (Asset)
Identification Number: CND80777Z3

Edit Delete Clone Service Retire

Asset Details System Details Hardware Details Software Details

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 'SOFTWARE' tab is selected in the navigation bar. Below the asset name, there are tabs for 'Asset Details', 'System Details', 'Hardware Details', and 'Software Details', with the latter being highlighted. A table lists the installed software assets:

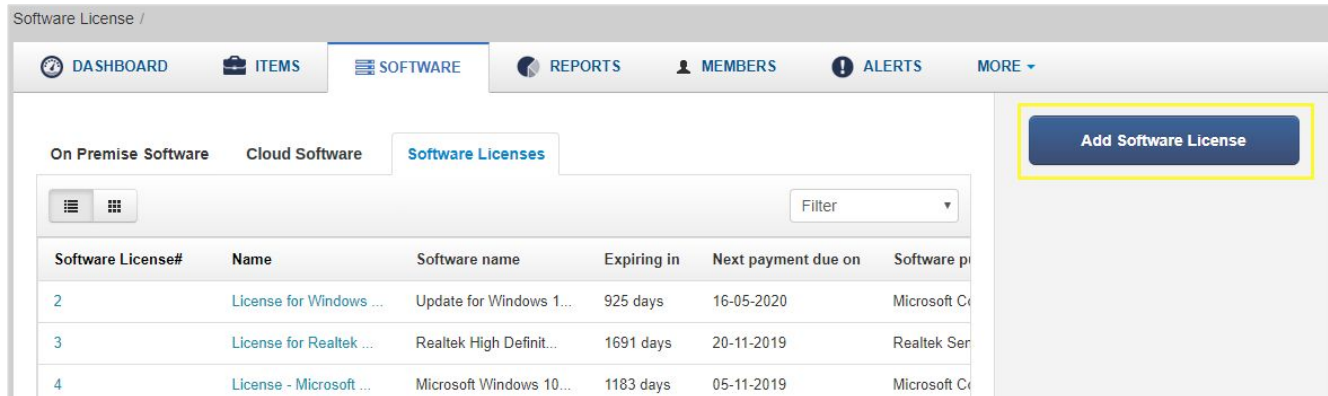
Software Name	Version	Manufacturer	Installation Date
WinRAR 5.61 (32-bit)	5.61.0	win.rar GmbH	
WildTangent Helper	1.0.0.300	WildTangent	
WildTangent Games	1.1.1.19	WildTangent	

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*.



Software License /

DASHBOARD ITEMS SOFTWARE REPORTS MEMBERS ALERTS MORE

On Premise Software Cloud Software Software Licenses

Filter

Software License#	Name	Software name	Expiring in	Next payment due on	Software provider
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

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 *	<input type="text" value="Adobe Illustrator 2019"/> (?)
Cost	<input type="text" value="19.99"/>
Payment Frequency *	<input type="text" value="Monthly"/>
Software Category	<input type="text" value="Design"/>
Software Type	<input type="text" value="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 *	<input type="text" value="Adobe Illustrator License"/>
License Identification Number	<input type="text" value="AI-0432"/>  Learn More
License Type *	<input type="text" value="Client Access License"/> ▼
License Options *	<input type="text" value="Per Seat User"/> ▼
Start Date *	<input type="text" value="11/04/2019"/>
End Date *	<input type="text" value="12/04/2019"/>
<input type="checkbox"/> Recur Indefinitely	
Owner	<input type="text" value="Steven Dais"/> ▼

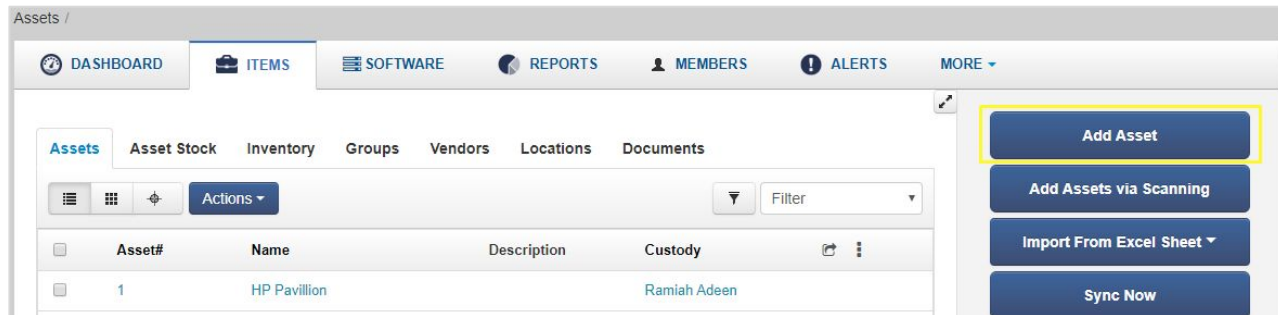
3

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 displays the 'Assets' module interface. The top navigation bar includes 'DASHBOARD', 'ITEMS', 'SOFTWARE', 'REPORTS', 'MEMBERS', 'ALERTS', and 'MORE'. Below this, the 'Assets' sub-module is active, with tabs for 'Asset Stock', 'Inventory', 'Groups', 'Vendors', 'Locations', and 'Documents'. A table lists assets with columns for 'Asset#', 'Name', 'Description', and 'Custody'. One asset is shown: '1' with 'Name' 'HP Pavilion' and 'Custody' 'Ramiah Adeen'. On the right side, a vertical menu contains four buttons: 'Add Asset' (highlighted with a yellow box), 'Add Assets via Scanning', 'Import From Excel Sheet', and '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.

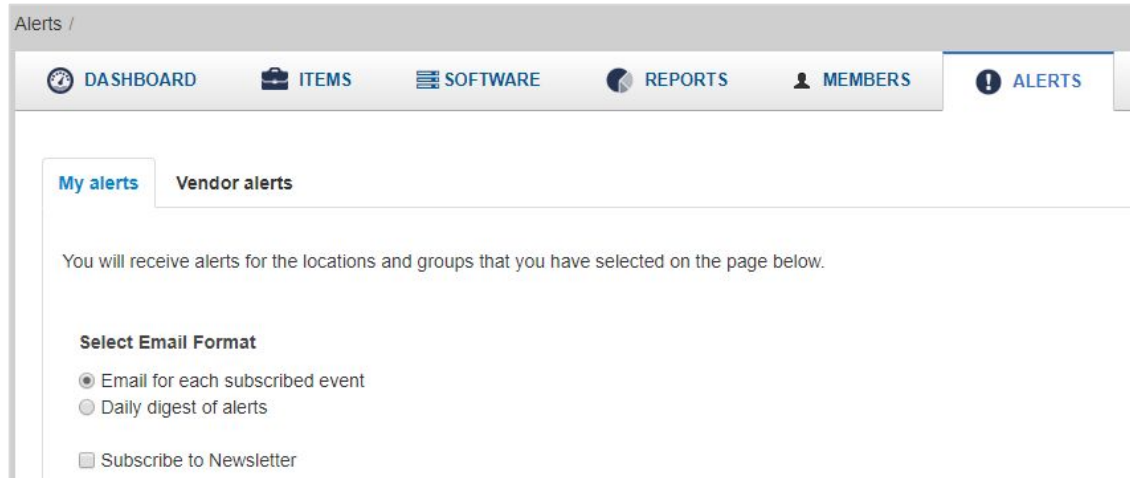
Note that new [groups](#) and vendors can be added when assigning to an asset. Once added, these will appear in *Items* → *Groups* and *Items* → *Vendors* respectively.

The screenshot shows the 'Create Asset' form in the Assets application. The breadcrumb trail is 'Assets / New /'. The navigation menu includes 'DASHBOARD', 'ITEMS', 'SOFTWARE', 'REPORTS', and 'MEMBERS'. The form is titled 'Create Asset' and has a section for 'Core Information'. The fields are as follows:

Field	Value
Name *	HP OfficeJet Pro
Product model number	9015
Group *	Printers (with 'Add Add Subgroup' link)
Identification Number	23 (with barcode icon)
Description	All-in-one printer. Supports printing, copying, scanning, faxing.

4 Set up alerts

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



The screenshot shows the 'Alerts' module setup page. At the top, there is a navigation bar with icons and labels for 'DASHBOARD', 'ITEMS', 'SOFTWARE', 'REPORTS', 'MEMBERS', and 'ALERTS'. Below the navigation bar, there are two tabs: 'My alerts' (active) and 'Vendor alerts'. The main content area contains the following text and options:

You will receive alerts for the locations and groups that you have selected on the page below.

Select Email Format

- Email for each subscribed event
- Daily digest of alerts
- Subscribe to Newsletter

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.

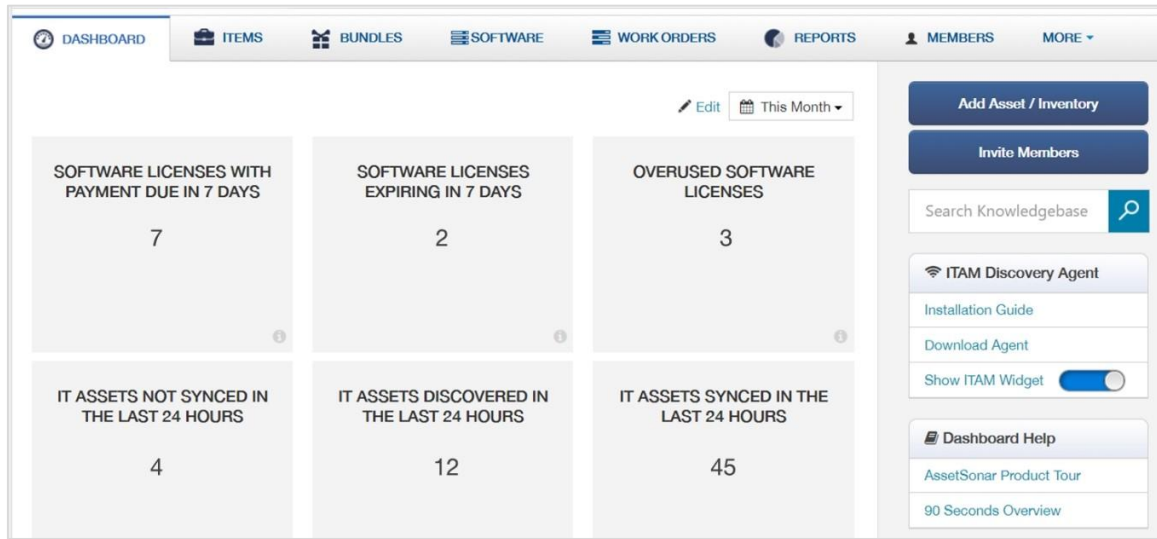
You can also specify how early you'd like to receive these two alerts.

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.

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 (?)

6 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

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