



Getting Started with AssetSonar

Upgrade your IT Asset Management

First Look

Set a company logo, select your time zone, enable the language translator, and configure a number of other **policy level settings** from *Settings* → *Company Settings*.

You can also access **data overviews** and take **quick actions** straight from the dashboard.

The screenshot shows the ValarTech dashboard interface. Key elements highlighted with red boxes and callouts include:

- Calendar icon:** A callout box says "Check the Availability Calendar to plan checkouts".
- User profile:** A callout box says "Manage your profile, settings and subscriptions here".
- ITAM Discovery Agent:** A callout box says "You can find information about the AssetSonar ITAM Discovery Agent here. Setting this up will automatically upload all your asset data into the system".
- Calendar widget:** A callout box says "Use the Dashboard Calendar for a snapshot of all active events".

The dashboard itself displays metrics such as "AVG. UPTIME 100.00% +1.50%", "ASSETS OVERDUE 93 Value for today", and "29.49% +0.26%". It also features a "Calendar" section for December 2017 and a "Search Knowledgebase" field.

Step 1: Identify Your Items

Identify what type of IT items you will track. You can activate Asset Stock and Inventory modules from *Settings* → *Add Ons*.

ITEMS TO KEEP

Assets



Assets are used over time and tracked individually, such as computers or printers. Your IT asset information will be automatically downloaded to AssetSonar using our agent.

Assets are checked out to people, reserved, serviced or moved across locations.

If you have 10 similar laptops, add 10 assets to the system. You can also use the clone functionality to do things quicker.

Asset Stock



Asset Stock is used over time but is not tracked individually, such as cables or software.

Asset Stock is checked out, reserved or moved across different locations.

If you have 10 cables, create an Asset Stock called Cables and add a stock of 10 to it. You will then check out quantities of this stock over time.

ITEMS TO CONSUME

Inventory



These are consumable items, such as toner or batteries.

You add or remove stock for inventory items.

If you have 10 toner cartridges, create an Inventory item called Toner and add a stock of 10 to it. You will then remove stock quantities as it gets consumed or sold over time.

Step 2: Add Items

Now that you've identified your item types, let's go ahead and add a few items.

+

Add an Asset

Start by adding an asset, say a MacBook

Clone Similar Assets

You can make 10 more copies of the first MacBook in one go by cloning it.

Explore the Detail Page

Add images, documents, comments, keep service logs, and take actions.

Try out Some Actions

Try out the basic actions, for example check out an asset to someone.

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Add Asset Stock

Add an asset stock record, like cables.

Add Stock to it

Next, add stock to it, such as 100 cables in Fairfax, and 70 in Baltimore.

Explore the Detail Page

Add images, documents, comments, take actions, and view Current Checkouts.

Try out Some Actions

Try out the basic actions, for example check out 10 cables to an employee.

+

Add Inventory

Start by adding inventory, like toner.

Add Stock to it

Now add stock to it, such as 100 pieces in Fairfax and 10 in Baltimore.

Explore the Detail Page

Add images, documents, comments, and take actions. Also define low stock thresholds.

Try out Some Actions

Try out the basic actions, for example add and remove stock.

Step 3: Add Custom Fields

If our predefined fields don't do it for you, you can always add Custom Fields. Different categories (such as Items, Carts, or Members) in AssetSonar can have different Custom Fields.

[Learn more](#)



Asset #33: MacBook Pro (15-inch)

RAM	32GB (2,400MHz DDR4)
Storage	2TB SSD
Ports	4x Thunderbolt 3 (USB-C)

ValarTech

Search



Samantha Bee

Custom Fields /

DASHBOARD

ITEMS

MEMBERS

REPORTS

ALERTS

MORE

Custom Fields are added and managed from here.

Custom fields

Printout templates

Add Custom Field

Custom Fields Help

Overview

Step 4: Add Groups, Vendors, Locations, and Documents

Groups

Use groups and subgroups to categorize your items. For example, all MacBooks and ProBooks can go into the Laptops group. You can also restrict users to only view asset groups they have permission to!

Vendors

Vendors who provide services, or supply assets and inventory go here. For example, you can keep a list of all your software vendors here. This section improves visibility into procurement and maintenance routines.

Locations

Assets & stock quantities can be tracked across different locations. If you provide the correct address when adding locations, we'll show your items on a map. These locations can also be building rooms, warehouses or cabinets.

Documents

All images and documents in your account can be placed in a central location. Any file that you upload to an item or a group - even a user's signature - gets added to the library. You can also import images and documents from Excel.

Assets Asset Stock Inventory Groups Vendors **Locations** Documents

Filter results here List by assets locations

Map Satellite

Canada

United States

Fairfax
Head Office
Warehouse 1
Rack 1
Warehouse 2

Click on locations to open location detail pages

Include Nested Locations

Step 5: Add Members

Members are individuals who check Assets or Asset Stock out, or use stock from Inventory. They can be Admins or Staff Users. **Admins** have full access and can add and update records. **Staff Users** cannot add or update items and don't see reports. They can only take actions for themselves.

You can add Members in bulk through an Excel with the 'Add Multiple Members' button on the right.



Emma Robinson
emma@example.com

IT Department

Staff User

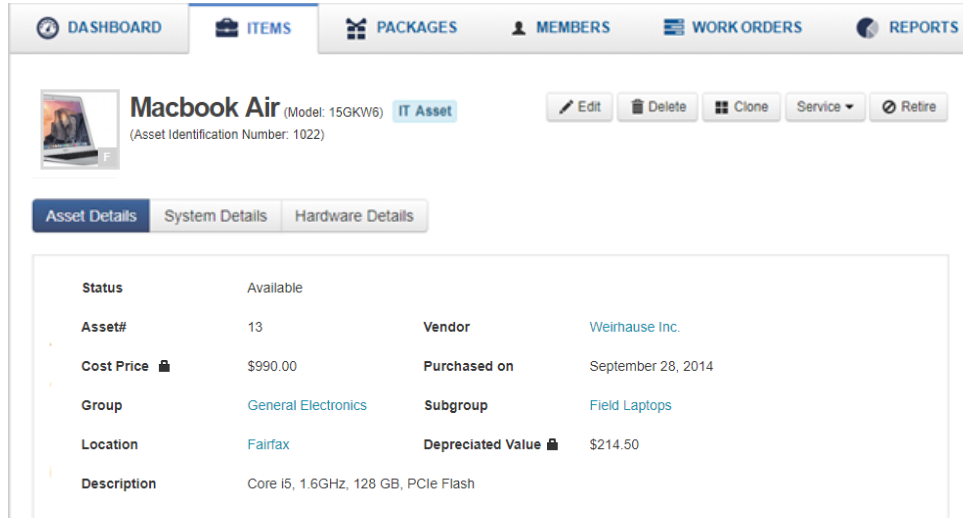
Has the HP Laptop checked out

You can also have **Non-Login** staff, whose records are maintained without them being able to log in. Admins checkout and reserve items for such users.

You can further configure the asset visibility and usage rights of members from Settings. This includes the Simple or Advanced Access Control options, as well as Arbitration to approve checkout and booking requests.

Name	Email	Role	Status	Reset Email
Carlson Peter	peter@business.com	Staff User	Unconfirmed	✕
Hopper Tom	tom@business.com	Staff User	Active	✕
London Barry	barry@business.com	Staff User	Active	✕
Lorne Elsa	elsa@business.com	Staff User	Non-Login	
Samantha Bee	momina.sohail@7vals.com	Account Owner		✕

Step 6: Set Up the ITAM Discovery Agent

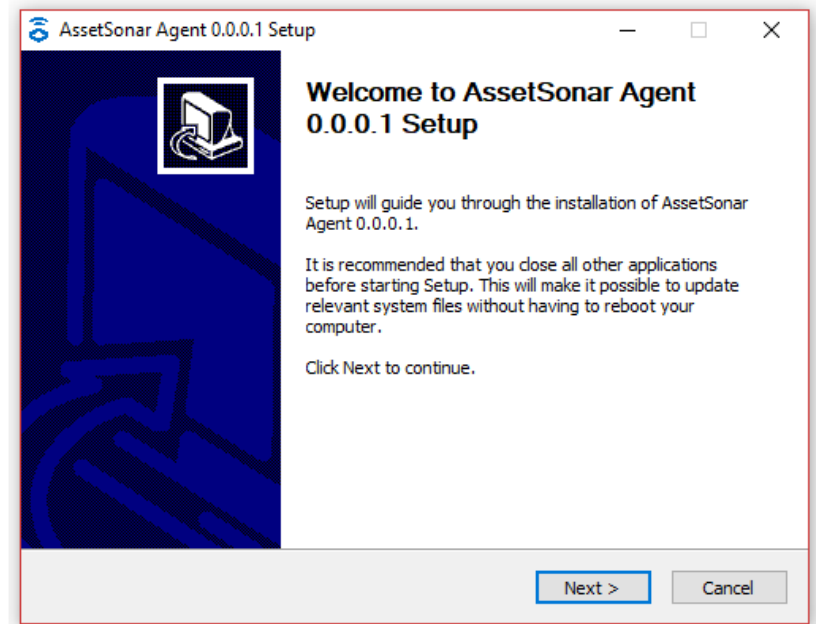


The screenshot shows the AssetSonar web interface. At the top, there are navigation tabs: DASHBOARD, ITEMS, PACKAGES, MEMBERS, WORK ORDERS, and REPORTS. The main content area displays the details for a 'Macbook Air' asset (Model: 15GKW6, Asset Identification Number: 1022). Below the asset name, there are tabs for 'Asset Details', 'System Details', and 'Hardware Details'. The 'Asset Details' tab is active, showing a table of asset information.

Status	Available	Vendor	Weirhouse Inc.
Asset#	13	Purchased on	September 28, 2014
Cost Price	\$990.00	Subgroup	Field Laptops
Group	General Electronics	Depreciated Value	\$214.50
Location	Fairfax	Description	Core i5, 1.6GHz, 128 GB, PCIe Flash

Our ITAM Discovery agent enables you to **update and track the system and hardware details** of all your IT assets.

To learn **how to download** the Agent, and set up data syncs using AssetSonar, click the image below:



Step 7: Take Actions on Items

Use AssetSonar to check items in and out, make reservations, send items into maintenance, and place audit requests.

ASSETS

- Check-in
- Checkout
- Extend Checkout
- Request Check-in
- Transfer Custody
- Request Audit
- Acknowledge Possession
- Reserve
- Add to Cart
- Start Service
- Extend Service
- End Service
- Retire
- Print Labels
- Add to Purchase Order
- Add to Work Order

ASSET STOCK

- Check-in stock quantity
- Checkout stock quantity
- Extend Checkout
- Reserve
- Add to Cart
- Retire Stock
- Add Stock
- Transfer Stock Location
- Print Labels
- Add to Purchase Order
- Add to Work Order

INVENTORY

- Remove stock quantity
- Add Stock
- Transfer Stock Location
- Request Stock
- Reserve
- Add to Cart
- Retire Stock
- Print Labels
- Add to Purchase Order
- Add to Work Order

Step 8: Subscribe to Email Alerts

All confirmed members **receive emails based on their selected actions of interest**, for example checkout, check-in, etc.

Staff members receive emails they've subscribed to only when they're involved in the action, while administrators receive emails for all actions across the company.

You can also customize the emails you receive when an alert is triggered.

The screenshot shows a web application interface with a navigation bar at the top containing 'DASHBOARD', 'ITEMS', 'MEMBERS', 'REPORTS', 'ALERTS', and 'MORE'. The 'ALERTS' tab is highlighted with a red box. Below the navigation bar, there are two tabs: 'My alerts' and 'Staff alerts'. A yellow callout box points to the 'ALERTS' tab with the text 'Alerts are managed and subscribed to from here'. The main content area is titled 'Select Email Format' and includes three options: 'Email for each subscribed event' (selected), 'Daily digest of alerts', and 'Subscribe to Newsletter'. Below this is a section titled 'Alert Type' with a sub-section 'Confirmation Alerts' containing 'User Registration - Non-login (?)' and 'Vendor Registration'. Another sub-section 'Checkin / Checkout' contains 'Checkin', 'Checkin Package', 'Checkin Request', and 'Checkin due today'. Each item has a checkbox to its left.

Alert Type	
Confirmation Alerts	
<input type="checkbox"/>	User Registration - Non-login (?)
<input type="checkbox"/>	Vendor Registration
Checkin / Checkout	
<input checked="" type="checkbox"/>	Checkin
<input checked="" type="checkbox"/>	Checkin Package
<input checked="" type="checkbox"/>	Checkin Request
<input type="checkbox"/>	Checkin due today

Step 9: Run Reports

GET INSIGHTS FROM REPORTS ON

- IT Asset Utilization
- Inventory and Stock Levels
- Asset Depreciation

- Check-in/Checkout events
- Reservations
- Audits

- Services & Maintenance
- Work Orders
- Purchase Orders

- Members
- Vendors
- Locations

To get more specific information within AssetSonar, you can create and save **Custom Reports**.

You can also **filter reports** as per your requirements. For example, you can filter IT Asset reports by group, location, date, members and vendors.

You can also **export your reports** to CSV or PDF.

Asset Reports



Available Assets



CheckedOut Assets



Check-in / Out Events



Overdue Assets



Retired Assets



All Active Assets



Asset Audits



Asset Scans



Asset Geo-Location



Asset Utilization



Depreciation



Summary



Asset Aggregate Quantity

Step 10: Try Out Different List Views

You can toggle between different views and take mass actions on items for quickly processing items.

The first button selects a Grid View, while the second simultaneously turns on the Compact View for Assets

Take Mass Actions on items here

Filter items here

Export data to a CSV or Customize Columns

The image displays two screenshots of the Asset Stock interface. The left screenshot shows the 'Assets' page in grid view. The top navigation bar includes a list view icon, a grid view icon (highlighted with a red box), a compact view icon (highlighted with a red box), and an 'Actions' dropdown menu. Below the navigation bar, there is a filter dropdown menu (highlighted with a red box) and a 'State: Available' filter. The main content area shows three asset cards: a Sony Projector (Asset#: 5), a Macbook Air (Asset#: 13), and an HP Probook (Asset#: 9). A yellow callout box points to the filter dropdown with the text 'Filter items here'. The right screenshot shows the 'Assets' page in compact view. The top navigation bar includes a list view icon, a grid view icon, a compact view icon (highlighted with a red box), and an 'Actions' dropdown menu. Below the navigation bar, there is a filter dropdown menu and a '1 of 12' pagination control. The main content area shows a table with columns for 'Location', 'Display picture', and 'Group'. The table contains four rows of data. A yellow callout box points to the 'Actions' dropdown menu with the text 'Take Mass Actions on items here'. Another yellow callout box points to the 'Actions' dropdown menu in the table with the text 'Export data to a CSV or Customize Columns'. The 'Actions' dropdown menu is open, showing options: Check-in, Checkout, Print Label, Add to Cart (highlighted), Start Service, End Service, Schedule Service, Retire, Acknowledge Possession, Change Display Picture, Add to Purchase Order, Request Audit, and Request Obsolete.

Similar to Compact View on Assets, there's a *Location Stock View* on Inventory and *Current Checkout View* on Asset Stock.

Step 11: Migrate Existing Data to AssetSonar

If you have data on Excel, **import it directly** into AssetSonar by going to any detail page (such as the page for Assets or Locations) and click *Import from Excel Sheet*. You can import the following data points:

- Assets, Asset Stock and Inventory
- Create Locations, Groups or Vendors during Import
- Members
- Assignments of Assets to Members
- Add Stock to existing Asset Stock or Inventory
- Custom Fields (provided they have been created)
- Images and Documents



Step 12: Print QR Code and Barcode Labels

In addition to **scanning Barcodes, QR Codes, and RFID Tags** using an external scanner, you can also use AssetSonar to design and print professional grade QR Code or Barcode labels.



With AssetSonar, you can **print new Barcode labels or use your existing Barcodes**. When using Barcodes it is necessary to enter the 'Identification Number' or Barcode number for your items.

You can also **customize labels** using the Label Designer. To access this, go to *More* → *Printout Templates*. You can set specific dimensions, add custom fields and rich formatting, and insert Barcodes and QR Codes to your label.

Step 13: Explore Features (I)

Once you're done with the basics, try out Advanced Settings and Add Ons. There are dozens of them, including:

CARTS

- Add items to carts for faster checkouts of IT assets for movement across locations
- Reserve carts in advance
- Create custom fields for carts

WORK ORDERS

- Create work orders
- Associate assets to work orders
- Assign work orders to members
- Track work order progress
- Get email alerts

PURCHASE ORDERS

- Create purchase orders and add items to them
- Send emails and invoices to vendors
- Track purchase orders

SERVICE TICKETS

- Create tickets to schedule and keep track of maintenance events. Add notes and service details, including details such as costs and associated vendors.

RECURRING SERVICE

- Define how often maintenance events need to be repeated
- Track to see if a service is pending, started, overdue or completed

DEPRECIATION

- Use the straight-line depreciation method to properly assess asset value over time
- Define percentage depreciation for assets at the group level

Step 13: Explore Features (II)

Here are some more Add Ons you can choose from under *Settings* → *Add Ons*:

CUSTOMIZATION

- Set multi-format custom fields for items and carts, including fields for dates and dropdowns. You can also customize email alerts.

ACCESS CONTROL

- Limit the visibility of certain items based on item group, location, or both. This is particularly useful when managing different departments or teams.

AVAILABILITY CALENDAR

- View items by availability using the availability calendar. This can help you plan out reservations in advance

CMDB

- Get better visibility into your IT landscape, creating linkages between users, items, and networks in order to help you support your employees easily.

LOCATION MANAGEMENT

- Manage asset meta locations with our rich locations feature. Linking assets to field locations enables you to distribute and use assets efficiently.

API

- Use our REST based APIs to access your assets or make AssetSonar work with third party applications

Step 14: Explore Integrations (Single Sign On)

For early access, contact us at support@assetsonar.com

AssetSonar enables you to use **SAML** so your organization can sign into our platform via a unified URL. You can use SAML to integrate different SSO apps with AssetSonar for the following benefits.

- Comprehensive data governance
- Single-click access
- Intelligent, real-time access security
- Optimized convenience across the platform

You can also allow users to use their **LDAP** credentials to access AssetSonar. This streamlines entry and helps companies respond to threats much more quickly.

The Okta logo consists of the word "okta" in a lowercase, blue, sans-serif font.The OneLogin logo consists of the word "onelogin" in a lowercase, black, sans-serif font.The Centrify logo features a red circular icon with a white stylized 'C' inside, followed by the word "Centrify" in a grey, sans-serif font.The PingIdentity logo features a red square icon followed by the word "PingIdentity" in a black, sans-serif font.

Step 14: Explore Integrations (Zendesk)

For early access, contact us at support@assetsonar.com

You can integrate AssetSonar with Zendesk for seamless IT service management. You can use this to link items and members to service desk tickets, end users, and agents.

- Quickly **identify and prioritize** what needs to be worked on.
- Pull up an asset's **service history log** and relay it to the agent.
- Check out **replacement items** to requesters as needed.
- Requesters can keep tabs on **the status of tickets** directly from AssetSonar.

This integration can help you cut down on repair times, promote efficiency, and improve the overall accuracy of your IT asset data.



Example: An employee files a ticket regarding a malfunctioning computer. AssetSonar tracks the asset specifications and maintenance history while Zendesk tracks the overall ticketing workflow. Zendesk tickets can even be created directly from AssetSonar.

Have questions? We're here to help!



Email: support@assetsonar.com

Blog: www.blog.assetsonar.com