AssetSonar

Mobile App Guide

IT ASSET MANAGEMENT ON THE GO

C O N T E N T S

1. THE DASHBOARD

The Dashboard quickly updates you on your IT asset-related activities and enables you to get a quick summary of all pressing business affairs in minutes!

1. **User Profile:** View your profile details here, including name, display picture, company name and email address.

2. **Things that need your attention:** Get up to speed with things that require your immediate attention, like Overdue Assets and Asset Stock.

3. **Today**: View check-ins and reservations due today.

4. **Tomorrow**: Prepare for check-ins and reservations due for the next day.

5. **Logging out:** Click on the left-arrow next to your profile to log out.

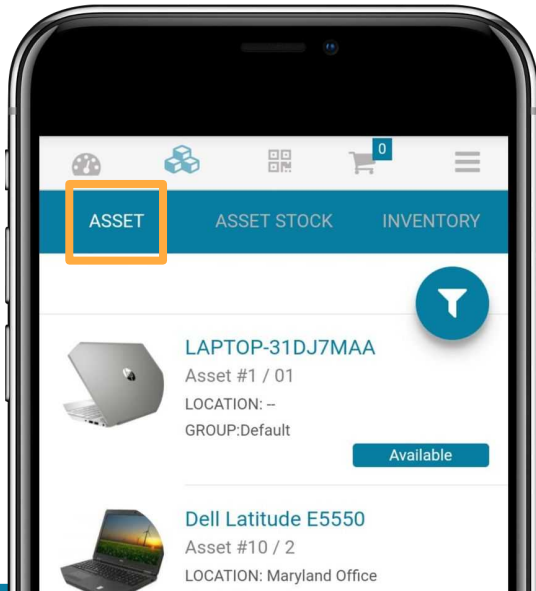6. **Help:** Use the help icon '?' to find your way around the app.

Note: Staff Users can only view data for items that are assigned to them.
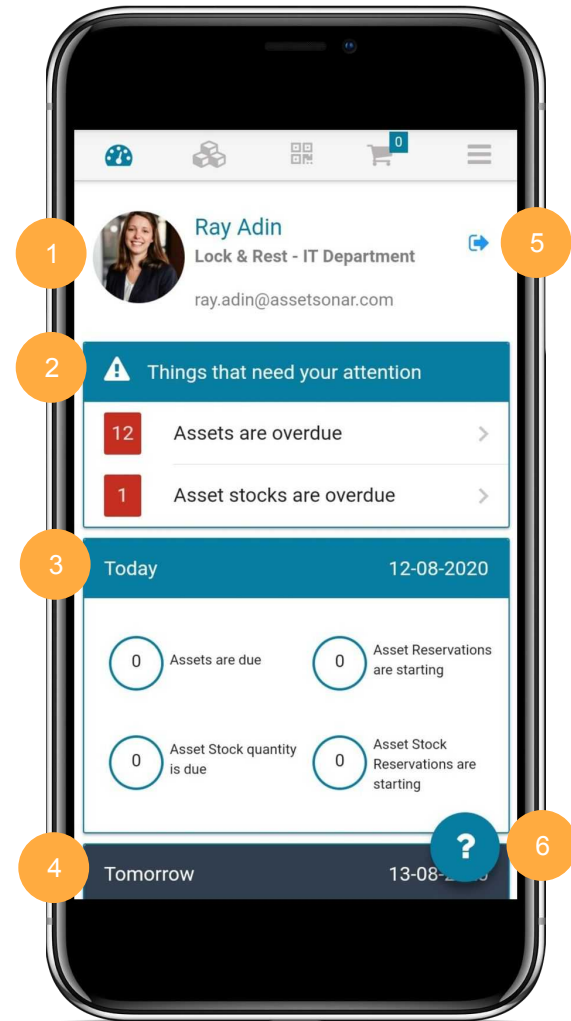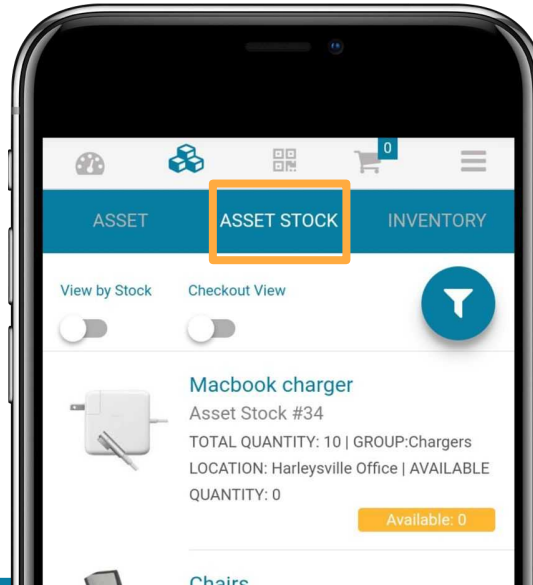
2. ITEMS

Click on the Items tab to view, add and edit all your items, and switch between item categories.

Assets

Asset Stock

Inventory

ASSET   ASSET STOCK   INVENTORY

LAPTOP-31DJ7MAA
Asset #1 / 01
LOCATION: --
GROUP:Default

Available

Dell Latitude E5550
Asset #10 / 2
LOCATION: Maryland Office

ASSET   **ASSET STOCK**   INVENTORY

View by Stock   Checkout View

Macbook charger
Asset Stock #34
TOTAL QUANTITY: 10 | GROUP:Chargers
LOCATION: Harleysville Office | AVAILABLE
QUANTITY: 0

Available: 0

Chairs

ASSET   ASSET STOCK   **INVENTORY**

View by Stock

HDMI Wires
Inventory #79 / 111C123
LOCATION: Baltimore Office |
GROUP:Webcam
QUANTITY: 500

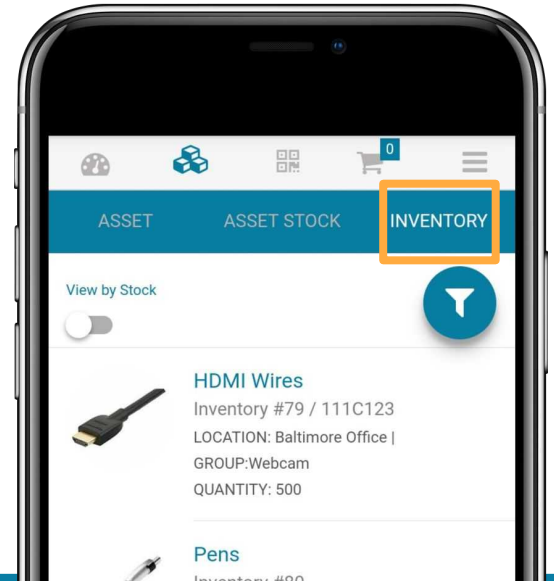Pens

2.1.   VIEWING ITEM LISTINGS

The Items tab enables you to view, add and edit all your items, including Assets, Asset Stock, and Inventory.

1. **Filtering items:** Click on the funnel '∇' icon to apply Asset filters and customize your view.

2. **Adding new items:** Tap the '+' button at the bottom-right to add new items to your database, right from your phone.

3. **Taking mass actions:** Click on item displays to select them. A play '▷' button will appear in place of the funnel. Click it to take an action like reserving the item for a user.

4. **Navigating to the Item Details page:** To head to an Item Details page, click on its description.
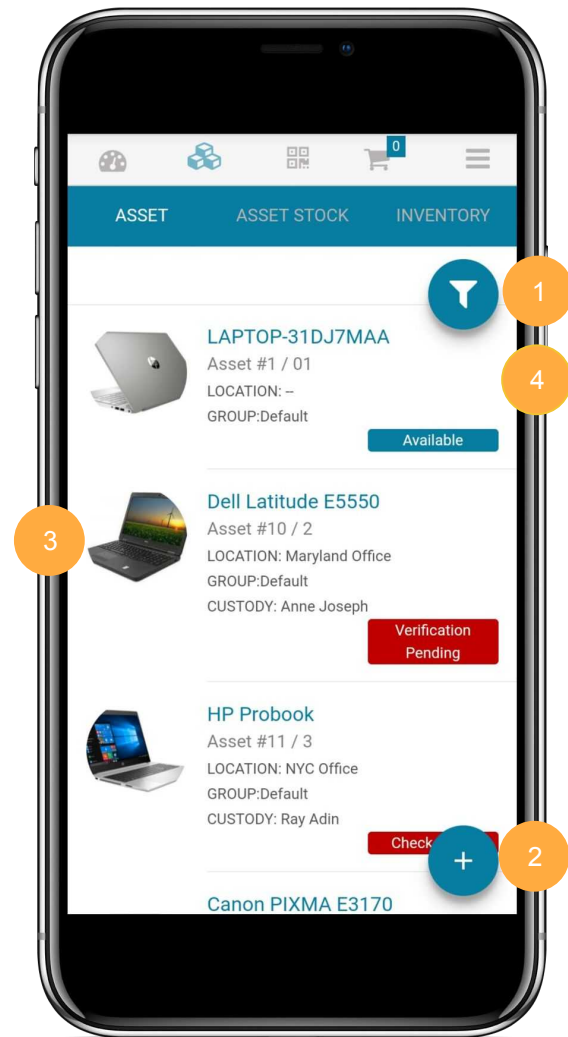
2.2. CHECKING ITEMS IN & OUT

The Item Details page serves as the source of all data on an item. Scroll down the page to view multiple data points such as the item's Location, Group, and Custom Fields.

You can check items in and out, edit their details or delete them from the Item Details page.

1. **Editing or deleting items:** Click on the vertical ellipsis '⋮' at the top-right to edit item details or to delete the item.

2. **Checking items in or out:** Click on the play '▷' button to log data regarding checkouts, services, reservations, and more from anywhere.

3. **Navigating back to the listing:** Click on the back arrow '←' to go back to the listing.
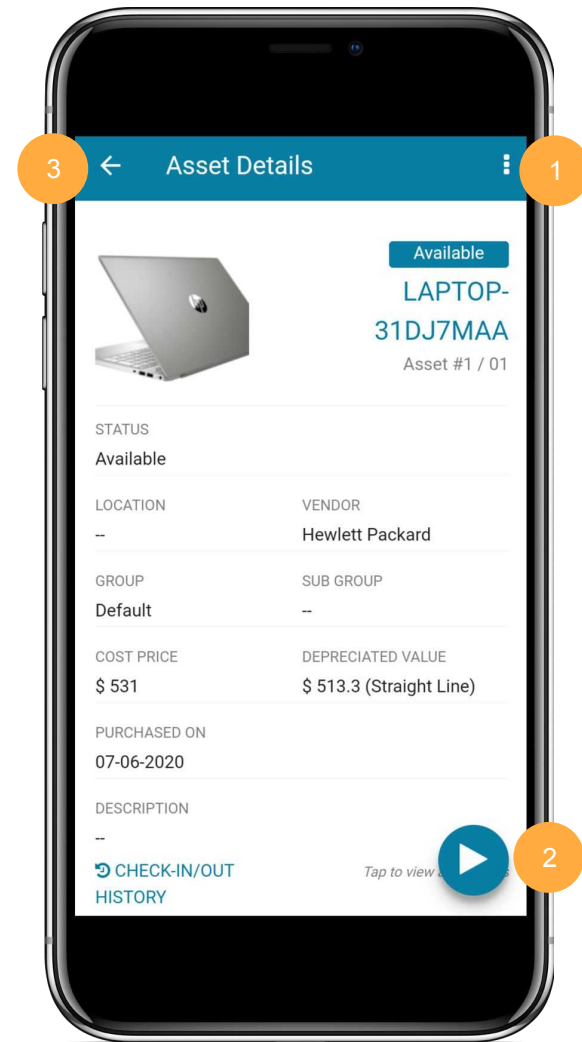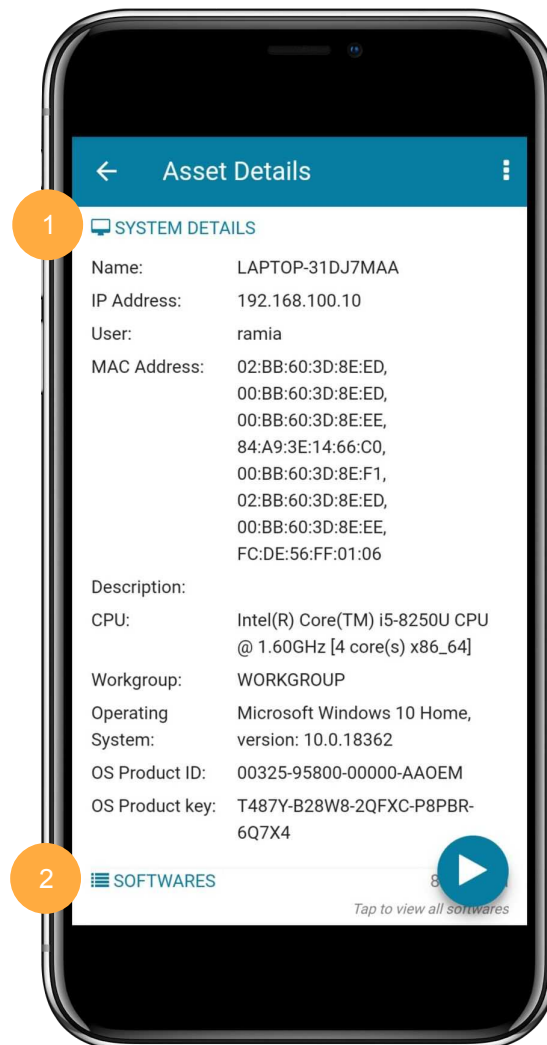
2.3. SYSTEM DETAILS & SOFTWARES

If you scroll down the Item Details page, you can get the following insights:

1. System Details: View details such as Name, IP and MAC Addresses, OS version, OS Product key and OS Product ID of the discovered IT asset. You can also see which User logged into the system.

2. Softwares: Click on the Softwares tab and view Name and Install Date of all the On Premise software installed in the IT asset. On Premise software is typically issued by the manufacturer and its partner vendor(s). To create licenses against the discovered On Premise software, go to the Software module in our desktop app.

←	**Asset Details**	⋮

1 🖥 SYSTEM DETAILS

Name:	LAPTOP-31DJ7MAA
IP Address:	192.168.100.10
User:	ramia
MAC Address:	02:BB:60:3D:8E:ED, 00:BB:60:3D:8E:ED, 00:BB:60:3D:8E:EE, 84:A9:3E:14:66:C0, 00:BB:60:3D:8E:F1, 02:BB:60:3D:8E:ED, 00:BB:60:3D:8E:EE, FC:DE:56:FF:01:06
Description:	
CPU:	Intel(R) Core(TM) i5-8250U CPU @ 1.60GHz [4 core(s) x86_64]
Workgroup:	WORKGROUP
Operating System:	Microsoft Windows 10 Home, version: 10.0.18362
OS Product ID:	00325-95800-00000-AAOEM
OS Product key:	T487Y-B28W8-2QFXC-P8PBR-6Q7X4

2 ☰ SOFTWARES

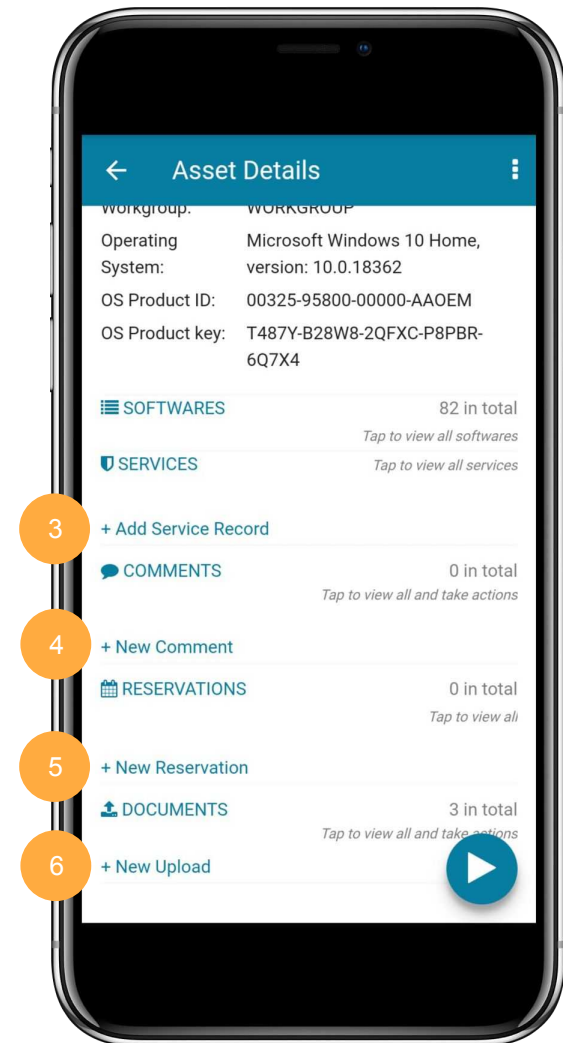*Tap to view all softwares*

2.4. ADDING SERVICES & RESERVATIONS

Scroll down the Item Details page to take the following actions:

3. Logging Services: Click on '+ Add Service Record' to log a new service event. View Service History for an item to get a snapshot of its problem areas.

4. Adding Comments: Create conversations around items with comments so no issues are overlooked. Add new comments from '+ New Comment' and view all past comments.

5. Adding a Reservation: View Reservation History and add new reservations for the item by clicking on '+ New Reservation'.

6. Downloading/uploading Documents: Download supporting documents like item manuals directly to your phone. To upload new documents, click on '+ New Upload'.

Asset Details

Workgroup:	WORKGROUP
Operating System:	Microsoft Windows 10 Home, version: 10.0.18362
OS Product ID:	00325-95800-00000-AAOEM
OS Product key:	T487Y-B28W8-2QFXC-P8PBR-6Q7X4

SOFTWARES — 82 in total
Tap to view all softwares

SERVICES — *Tap to view all services*

3 + Add Service Record

COMMENTS — 0 in total
Tap to view all and take actions

4 + New Comment

RESERVATIONS — 0 in total
Tap to view all

5 + New Reservation

DOCUMENTS — 3 in total
*Tap to view all and take actions*

6 + New Upload

2.4. TAKING MASS ACTIONS

Use the Item Listings to take a variety of mass actions like adding several items to Cart or checking in multiple laptops after a conference is over. Click on the display pictures to select multiple items. A play '▷' button will appear once you start selecting items. Click it to see the list of possible actions you can take.
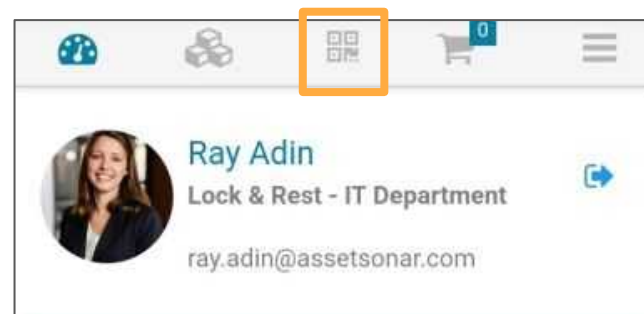
1. Check items in and out or extend checkouts.

2. Reserve items in advance from wherever you are.

3. Retire multiple items in one go.

4. Verify possession if you've received an assortment of items.

5. Add items to the Active or Reserved Cart.

6. Record a Service event, start a Service, or end it for multiple IT assets.
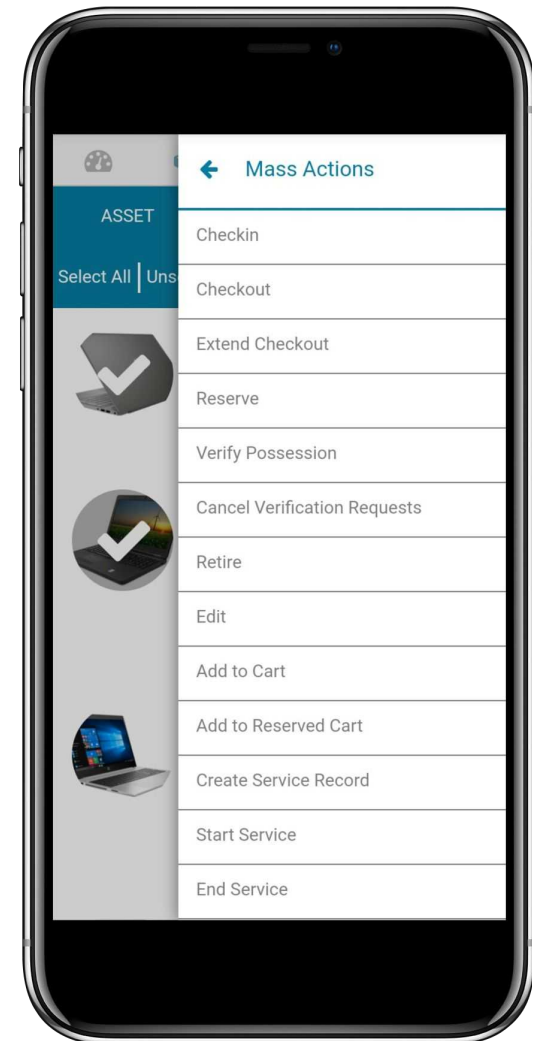
3. SCANNING ITEMS

Scan upto 25 items in quick succession with AssetSonar's Barcode/QR Code Scanner for swift item processing. Here's how to do it:

1. Click on the Barcode in the top panel.

2. Position the Barcode or QR Code within the designated area. Upon detection, the screen will display the Item #.

3. Once you've scanned all items (upto 25), click 'Completed'.

4. Check out scanned items or add them to the database if they're new!


Ray Adin
Lock & Rest - IT Department
ray.adin@assetsonar.com

Total 0 (of max 25) items have been scanned

8 80105 1 262681

Completed

4. CARTS

Carts enable you to check out or reserve multiple items together. The Carts tab also supports a Barcode scanner, so you can add items directly to the Current Cart.

The Carts Add On will have to be enabled from the desktop app in order to show up on the Mobile App. To do this, head to *Settings → Add Ons → Carts* from the desktop app and enable the Add On.

Once enabled, open the Carts tab from the Mobile App and toggle between Cart (Current Cart) and Cart Transactions.

- Cart tab lets you view, edit, and take actions on the current Cart.

- Cart Transactions tab provides you an overview of all your transactions.
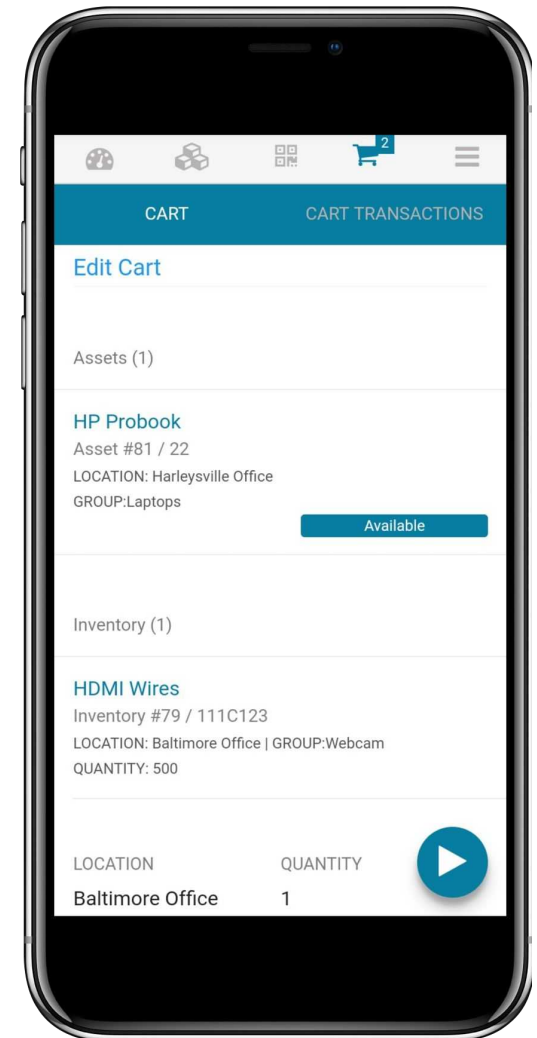
4.1. TAKING ACTIONS ON CURRENT CART

To access the Current Cart, go to the Cart section under the Carts tab.

1. **Editing the Current Cart:** Hit 'Edit Cart' to add items, change the Checkout or Due Date, or update Cart details. You can also access this by clicking these options from *play '▷' → Edit Cart*. You can also choose to add items from Fuzzy List suggestions.

2. **Checking out current Cart:** Check out Cart from *play '▷' → Checkout Cart.*

3. **Reserving the Cart:** Reserve Cart from *play '▷' → Reserve Cart*.

4. **Printing Cart details:** Print Cart details from *play '▷' → Print Cart*.

5. **Adding Comments:** Scroll down through this view and click '+ Add Comments'.

4.2. VIEWING ALL CART TRANSACTIONS

Get a quick recap of all your Cart Transactions from this section. You can also apply filters by clicking on the funnel icon to view Carts by status. Use these to glean insights regarding:

- All Carts

- Active Carts

- Active (including drafted) Carts

- Checked Out Carts

- Reserved Carts

- Completed Carts
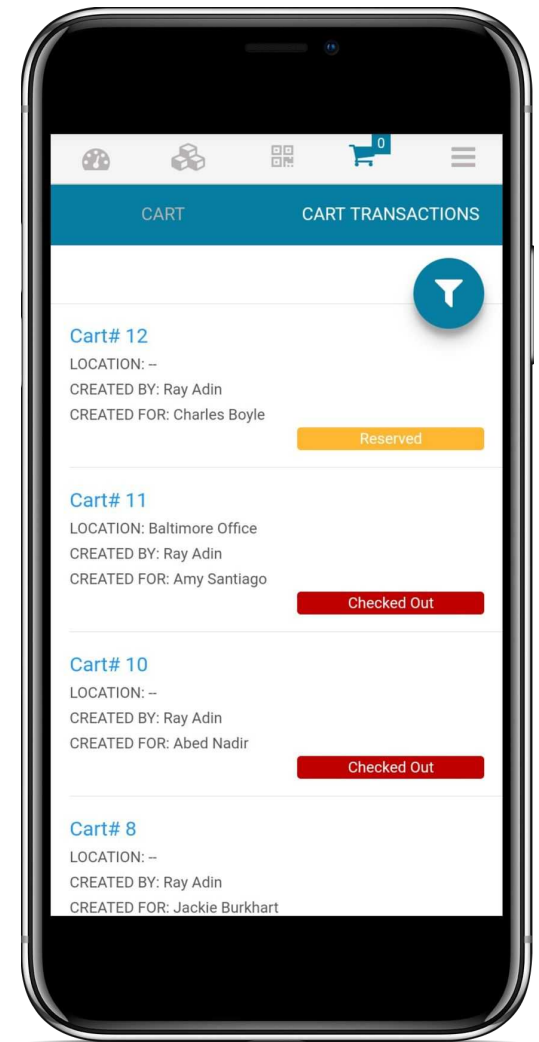
5. SEARCHING FOR ITEMS

With a vast IT asset database, finding a specific item can be tedious. This is where the Search tab is extremely useful.

Click the Hamburger menu '☰' on the top-right and open the Search tab to look for items and Carts in your AssetSonar database.

You can also customize the search by choosing which categories to include and exclude by toggling their buttons.

To search for an item:

1. Include or exclude Asset, Asset Stock, Inventory or Cart categories from the search by using the toggle buttons at the top.

2. Use the search field to type in your query.
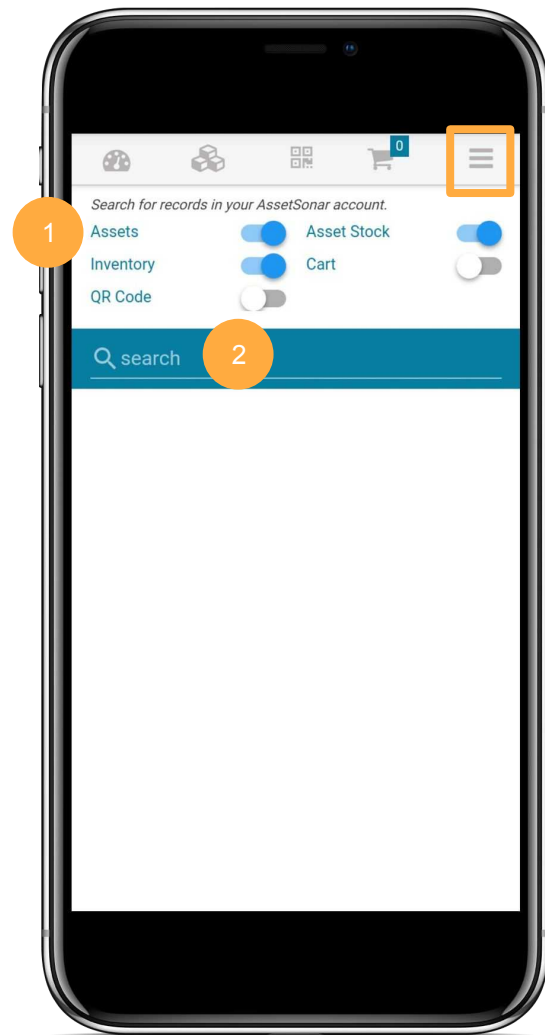
5. SEARCHING FOR ITEMS

3. Once AssetSonar pulls up all matching queries, go to the Item Details page for your concerned item. Refer to Sections 2.2 and 2.3 to learn about the various actions that you can take from here.

4. Click on the display pictures to select multiple items to take mass actions on them. Refer to Section 2.4 to learn more about mass actions.
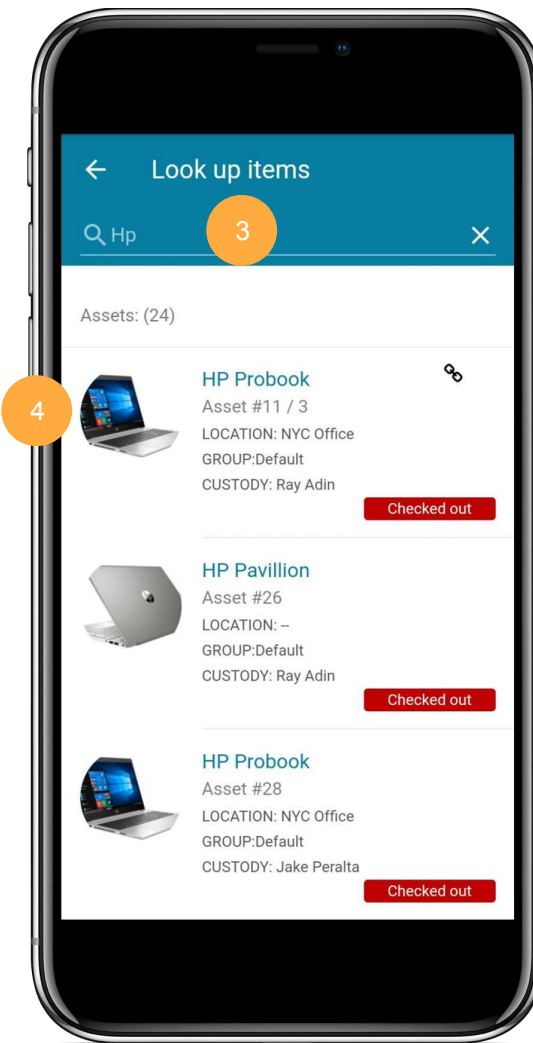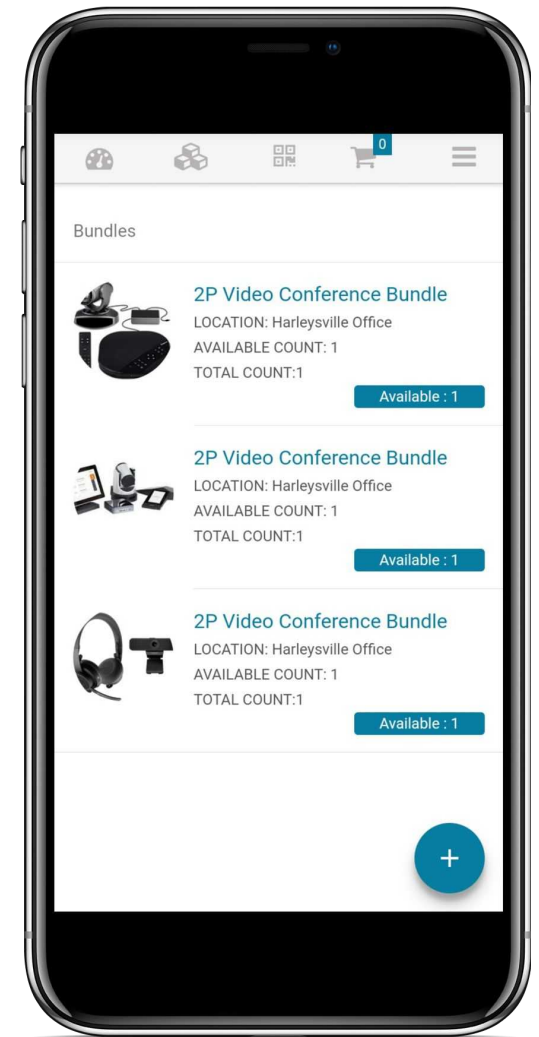
6. BUNDLES

Bundles in the AssetSonar Mobile App enable companies to group items based on their own company workflows in order to speed up item processing and enhance productivity. Let's say, you want to checkout multiple laptops, webcams, and headsets for a video conference. You can check all these items out as a Bundle and save yourself time.

To use Bundles, you will first have to enable the Add On from the desktop app. The Bundles tab will not be visible in the mobile app if the Add On is disabled.

To enable Bundles, go to *Settings → Add Ons → Bundles* from the desktop app. Note that Bundles cannot be enabled if the Carts Module is disabled.

That's it! Now, access this tab from the mobile app by clicking on the Hamburger menu '≡' at the top-right.

6.1. BUNDLES LISTING

The Bundles Listing enables you to get a bird's eye view of all your Bundles so you can access them to take further actions.
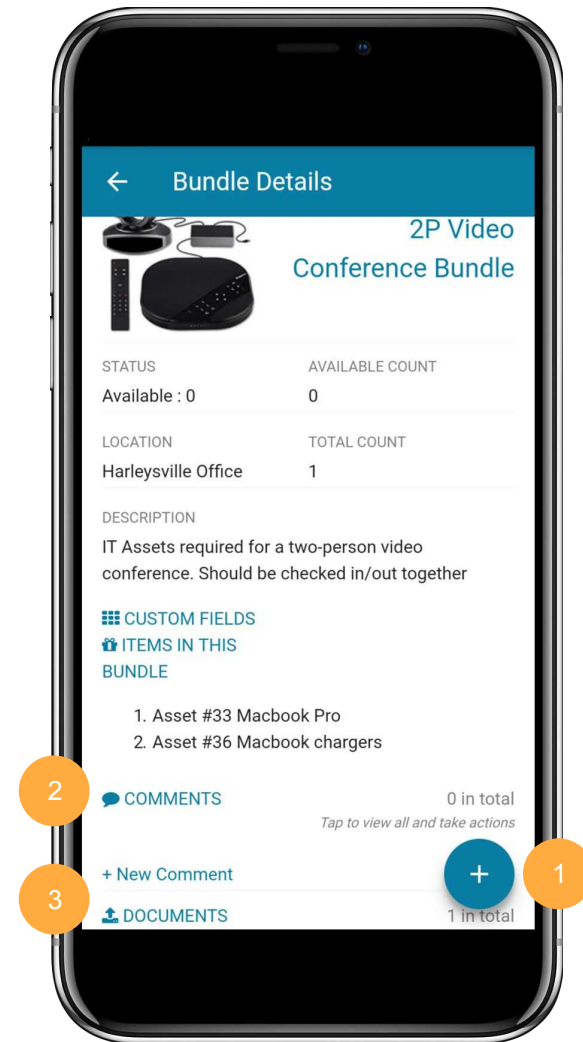
1. Click on the '+' icon to open up the Barcode or QR Code Scanner to scan labels for items in a Bundle. Take desired actions once the scan is complete. Refer to Section 5 to learn more about Scanning.

2. Click on a Bundle to go to its Details page.
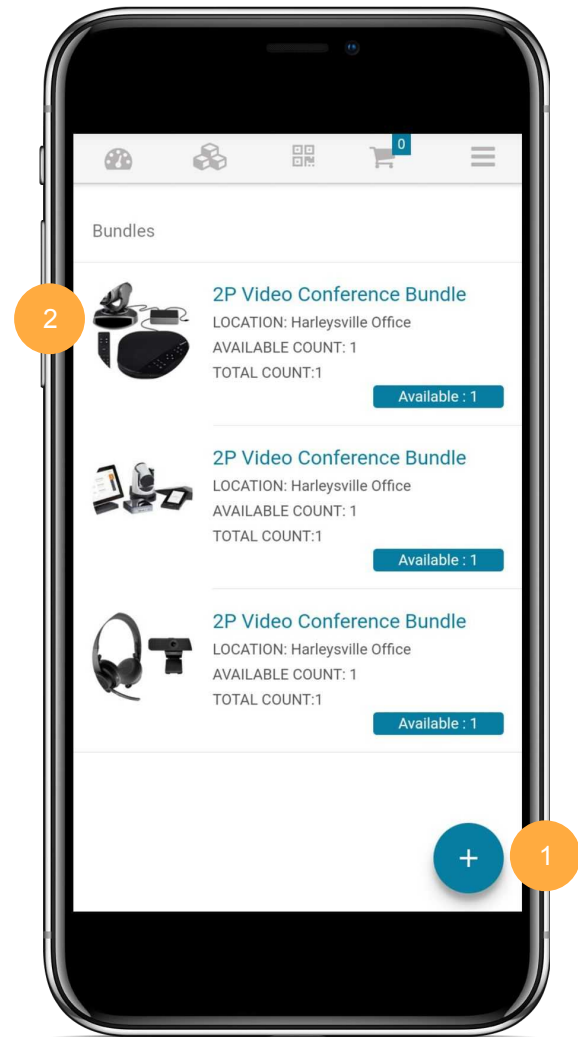
6.2. TAKING ACTIONS ON BUNDLES

You can use the Bundles tab to add a Bundle to Cart by going to its Details page. This escalates the checkout process and enables users to find everything they need without a hassle.

1. Click on the '+' button to add the Bundle to Cart. You will be able to select or deselect Bundle Items before adding them to the Cart that you want to check out.

2. Read existing comments on the Bundle or add new ones by clicking on '+ New Comment'. This provides a space for users to discuss even the smallest of concerns regarding the Bundle.

3. Download supporting documents from the Documents section.

Bundle Details

2P Video Conference Bundle

STATUS
Available : 0

AVAILABLE COUNT
0

LOCATION
Harleysville Office

TOTAL COUNT
1

DESCRIPTION
IT Assets required for a two-person video conference. Should be checked in/out together

CUSTOM FIELDS
ITEMS IN THIS BUNDLE

1. Asset #33 Macbook Pro
2. Asset #36 Macbook chargers

COMMENTS   0 in total
Tap to view all and take actions

+ New Comment

DOCUMENTS   1 in total

ABOUT ASSETSONAR

We launched AssetSonar to help IT equipment-intensive organizations increase efficiency and reduce costs. AssetSonar is powered by EZOfficeInventory. After streamlining operations for thousands of companies across the globe, from Fortune 500s to start-ups, we entered the IT landscape. Offering a combination of this experience and ITAM industry best practices, AssetSonar offers the leading IT asset management.

AssetSonar enables companies to lower administrative burdens related to tracking, organizing, and monitoring IT assets across locations. This is made possible with centralized device management, restricted access control, and services and maintenance. Enhance performance while strengthening both security and accountability with a well-rounded IT asset management platform.

Sign up for a free 15-day trial today, no credit card required!

https://ezo.io/assetsonar/sign_up/

FOR FURTHER ASSISTANCE:

🌐 https://ezo.io/assetsonar/sign_up/

✉ support@ezo.io

📞 +1 888 623 8654