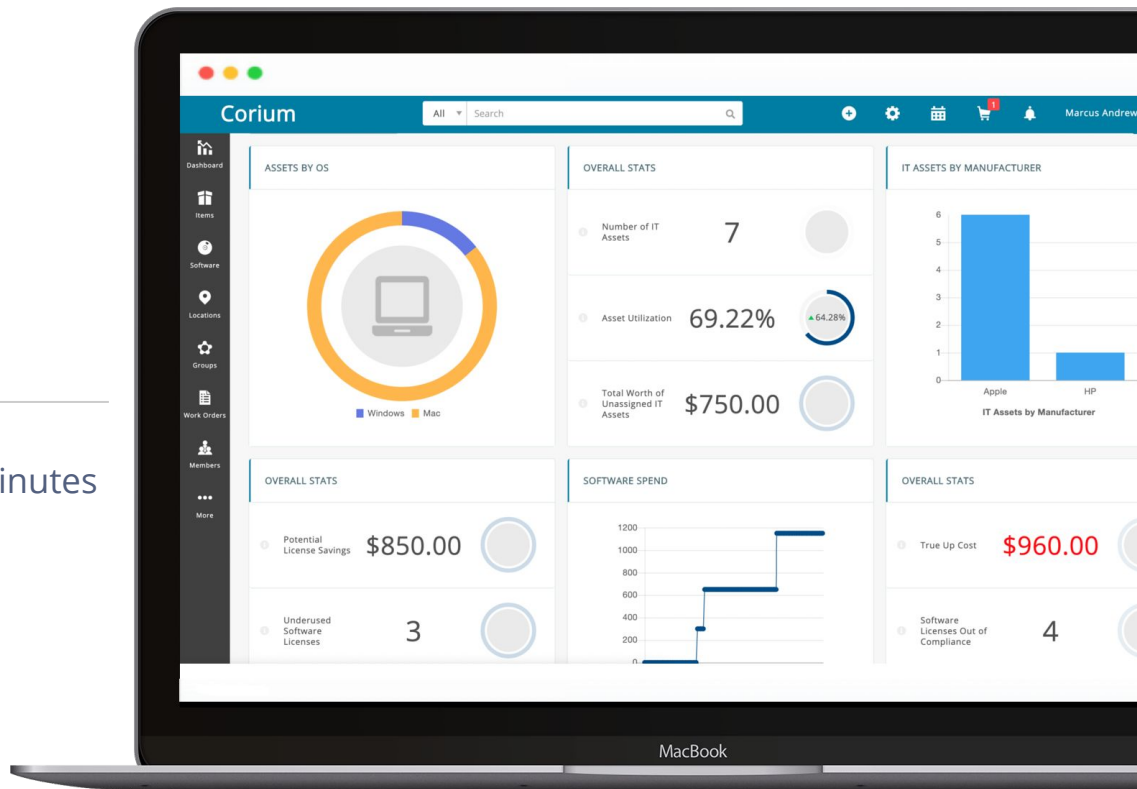


# GETTING STARTED WITH AssetSonar

Set up powerful IT Asset Management in minutes



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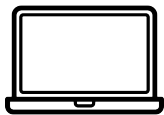
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# What can I track with AssetSonar?

Identify what **types of items** you will track. You can track IT Assets, IT peripherals, and regular items in AssetSonar.

## IT Assets



An IT Asset is a hardware asset, for example, a laptop or a desktop computer, that is either running our Agent or imported into AssetSonar via Jamf or SCCM.

## IT Peripherals



IT Peripherals are devices that connect to a computer and offer added functionality. These include printers (Assets), USB Drives (Asset Stock), and batteries (Inventory).

## Regular items



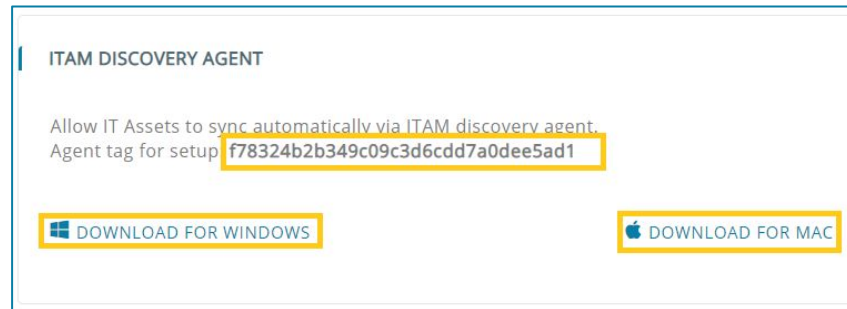
These are non-IT items that businesses use and track for regular operations, e.g. vehicles (Assets), chairs (Asset Stock), and water bottles (Inventory).

For each IT Asset, you can add **five** IT Peripherals or regular items to the package at **no additional cost**.

## 2 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 Asset Listings page and click the 'Sync Now' button in the top right corner.



Assets

IMPORT ASSETS ▼

SYNC NOW



+ ADD ASSET

ACTIONS ▼

Filter ▼

Select View ▼

EXPORT TO CSV

<input type="checkbox"/>	DISPLAY PICTURE	ASSET#	NAME	DESCRIPTION	CUSTODY	
<input type="checkbox"/>		2	iPad 2			
<input type="checkbox"/>		1	MacBookPro 15 (2013)			





The 'Sync Now' button updates machine specifications for all Agent-discovered devices in AssetSonar.

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

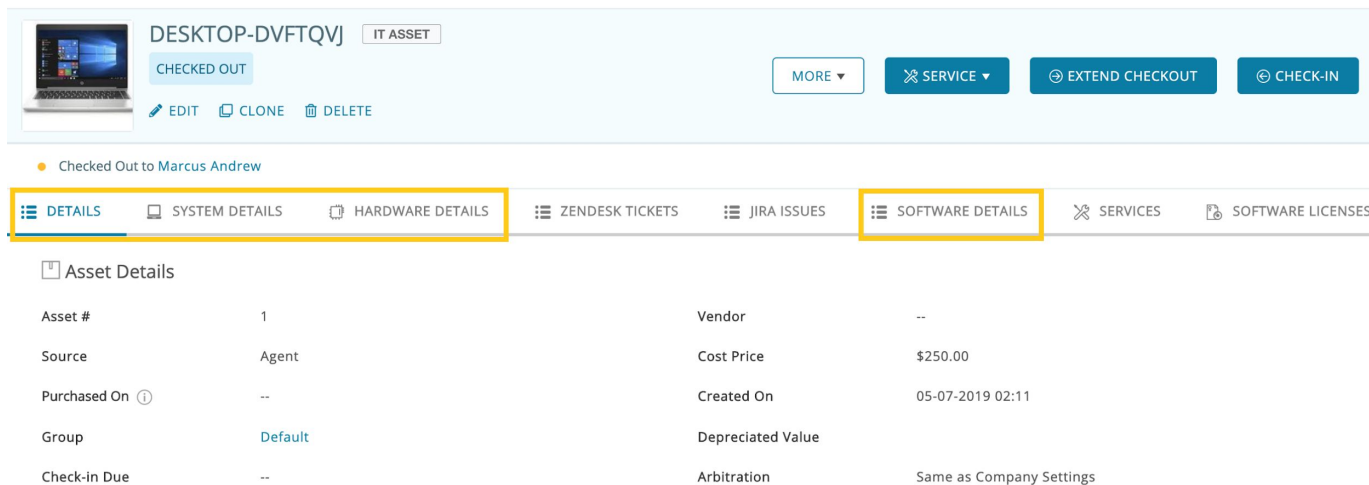
**Want to speed up AssetSonar deployment across your organization?** Our new ITAM Discovery Agent bypasses tag configuration so you can deploy it right away. [Contact us for a pre-configured Agent](#).

Once synced, the IT Asset will be added to your AssetSonar account.

This item is now 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.

ACTIONS ▼		Filter ▼	Select View ▼				EXPORT TO CSV	
<input type="checkbox"/>	DISPLAY PICTURE	ASSET#	NAME	CUSTODIAN DEPARTMENT	CUSTODY	LAST SYNC DATE	MANUFACTURER	
<input type="checkbox"/>		2	iPad 2	Design	Jake Peralta	06/19/2020 04:26	Apple	
<input type="checkbox"/>		3	LAPTOP-31DJ7MAA	IT	Ray Adin	06/19/2020 04:26	HP	
<input type="checkbox"/>		1	MacBookPro 15 (2013)	Finance	Amy Santiago	06/19/2020 04:26	Apple	

To see hardware and software data for a device, head to its Asset 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.

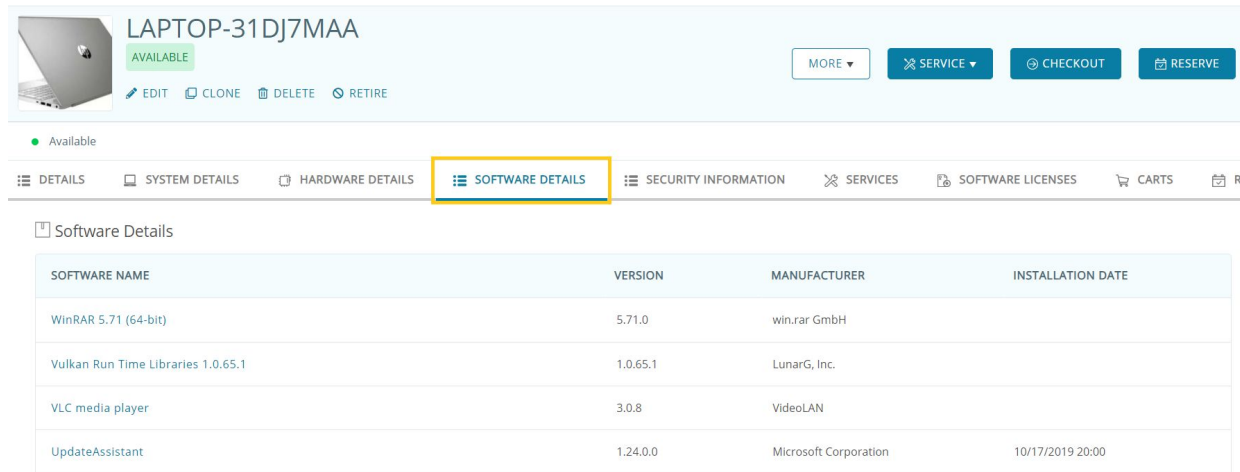


The screenshot shows the 'Asset Details' page for a device named 'DESKTOP-DVFTQVJ'. The page header includes a laptop icon, the asset name, a tag 'IT ASSET', and a status 'CHECKED OUT'. Below this are buttons for 'EDIT', 'CLONE', 'DELETE', 'MORE', 'SERVICE', 'EXTEND CHECKOUT', and 'CHECK-IN'. A notification indicates the asset is 'Checked Out to Marcus Andrew'. The main navigation bar contains tabs for 'DETAILS', 'SYSTEM DETAILS', 'HARDWARE DETAILS', 'ZENDESK TICKETS', 'JIRA ISSUES', 'SOFTWARE DETAILS', 'SERVICES', and 'SOFTWARE LICENSES'. The 'DETAILS' tab is active, showing a table of asset information.

Asset Details	
Asset #	1
Source	Agent
Purchased On ⓘ	--
Group	Default
Check-in Due	--
Vendor	--
Cost Price	\$250.00
Created On	05-07-2019 02:11
Depreciated Value	
Arbitration	Same as Company Settings

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

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 displays the AssetSonar interface for a device named LAPTOP-31DJ7MAA. The device status is 'AVAILABLE'. The 'SOFTWARE DETAILS' tab is selected and highlighted with a yellow box. Below the tab, a table lists installed software assets.

SOFTWARE NAME	VERSION	MANUFACTURER	INSTALLATION DATE
WinRAR 5.71 (64-bit)	5.71.0	win.rar GmbH	
Vulkan Run Time Libraries 1.0.65.1	1.0.65.1	LunarG, Inc.	
VLC media player	3.0.8	VideoLAN	
UpdateAssistant	1.24.0.0	Microsoft Corporation	10/17/2019 20:00

These will also be accessible from the Software module, where all discovered software assets from across the network are consolidated.



## Import IT Assets from External Sources (Jamf, SCCM)

You can also use our out-of-the-box integrations with [Jamf Pro](#) and [Microsoft SCCM](#) to mass import your Mac and Windows devices into AssetSonar.

In addition to this, you can mass deploy the AssetSonar Agent across your Mac, Windows, and Linux devices to set up a comprehensive database. Read our guides below for more information:

- [\[How-to\] mass deploy the AssetSonar Agent on your Apple Devices with Jamf Pro](#)
- [\[How-to\] mass deploy the AssetSonar Agent across Windows endpoints using Microsoft SCCM](#)
- [\[How-to\] mass install the AssetSonar Agent in your Linux Devices](#)

If you want to remotely install the AssetSonar Agent using Directory-as-a-Service solutions such as [Jumpcloud](#), you can contact our team for a pre-configured package at [support@ezo.io](mailto:support@ezo.io)

## 4

# Add Software Licenses

AssetSonar's Software module enables you to create and manage your [Software Licenses](#).

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

Software Licenses

+ ADD SOFTWARE LICENSE

IMPORT FROM SHEET ▾

Filter ▾

☰

☲

SOFTWARE LICENSE#	NAME	SOFTWARE NAME	EXPIRING IN	NEXT PAYMENT DUE ON	SOFTWARE PUBLISHER	START DATE	COST	STATE	CREATED AT	
4	<a href="#">License - CIO Compon...</a>	64 Bit HP CIO Compon...	30 days	--	Hewlett-Packard	06/19/2020	usd23.00	ACTIVE	06/19/2020 05:37	
5	<a href="#">License - 7 Zip 19</a>	7-Zip 19.00	30 days	07/19/2020	Igor Pavlov	06/19/2020	usd19.00	ACTIVE	06/19/2020 05:38	
6	<a href="#">License - Activity M...</a>	Activity Monitor.app	30 days	07/19/2020	--	06/19/2020	usd20.00	ACTIVE	06/19/2020 05:39	

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).

Go on to specifying the license information.

### Create Software License

#### Core Information

Software Name *	Adobe Photoshop 2020 ▼	ⓘ
Cost	19.99	
Payment Frequency *	Monthly ▼	
Software Category	Design ▼	
Software Type	Installed Software ▼	
Location	Brooklyn Office ▼	⊕

4

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).


Create Software License

License Name \*

License - Adobe Photoshop

License Identification Number

AP-0432

 [Learn more](#)

License Type \*

Client Access License ▼

License Options \*

Per Seat User ▼

Start Date \*

06/19/2020

☒ Recur Indefinitely

Owner

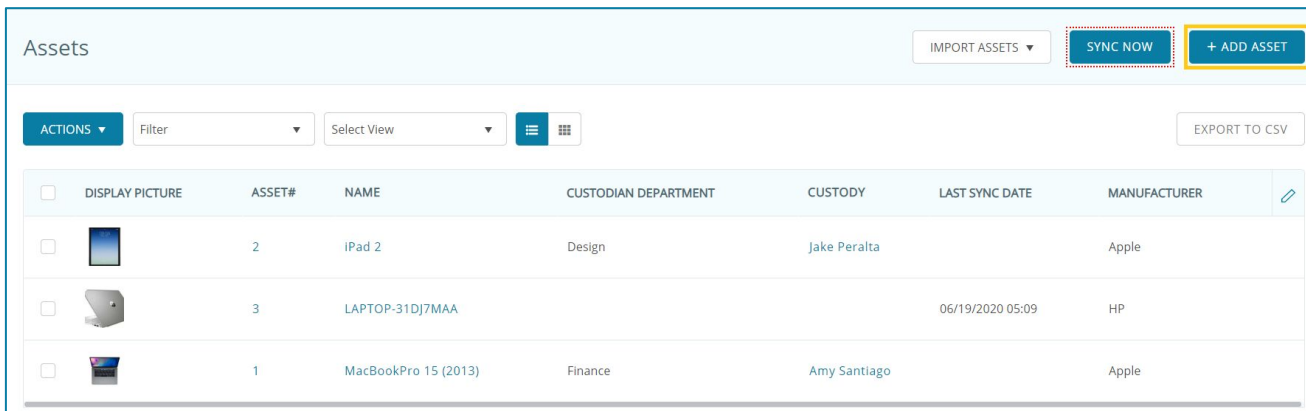
Jake Peralta ▼

## Add IT Peripherals or regular items




Add IT Peripherals and **regular items** to track office supplies. These can be categorized into:

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

To add IT Peripherals and regular items, head to the Items module, and add items as needed.




The screenshot displays the 'Assets' management interface. At the top, there are buttons for 'IMPORT ASSETS', 'SYNC NOW', and '+ ADD ASSET'. Below these are filters for 'ACTIONS', 'Filter', 'Select View', and an 'EXPORT TO CSV' button. The main table lists three assets with columns for a checkbox, display picture, asset number, name, custodian department, custody, last sync date, and manufacturer.

<input type="checkbox"/>	DISPLAY PICTURE	ASSET#	NAME	CUSTODIAN DEPARTMENT	CUSTODY	LAST SYNC DATE	MANUFACTURER	
<input type="checkbox"/>		2	iPad 2	Design	Jake Peralta		Apple	
<input type="checkbox"/>		3	LAPTOP-31DJ7MAA			06/19/2020 05:09	HP	
<input type="checkbox"/>		1	MacBookPro 15 (2013)	Finance	Amy Santiago		Apple	

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 the 'Groups' module and *More* → *Vendors* respectively.



Create Asset

NO IMAGE

Core Information

Specify the primary description for your Asset

Name \*

HP OfficeJet Pro

Product Model Number

9015

Group \*

Printers

Identification Number

23

BIOS Serial Number

Description

All-in-one printer. Supports printing, copying, scanning, and faxing.

## 6 Set up alerts

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

### Alerts

**MY ALERTS**STAFF ALERTSVENDOR ALERTS

---

**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.

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.

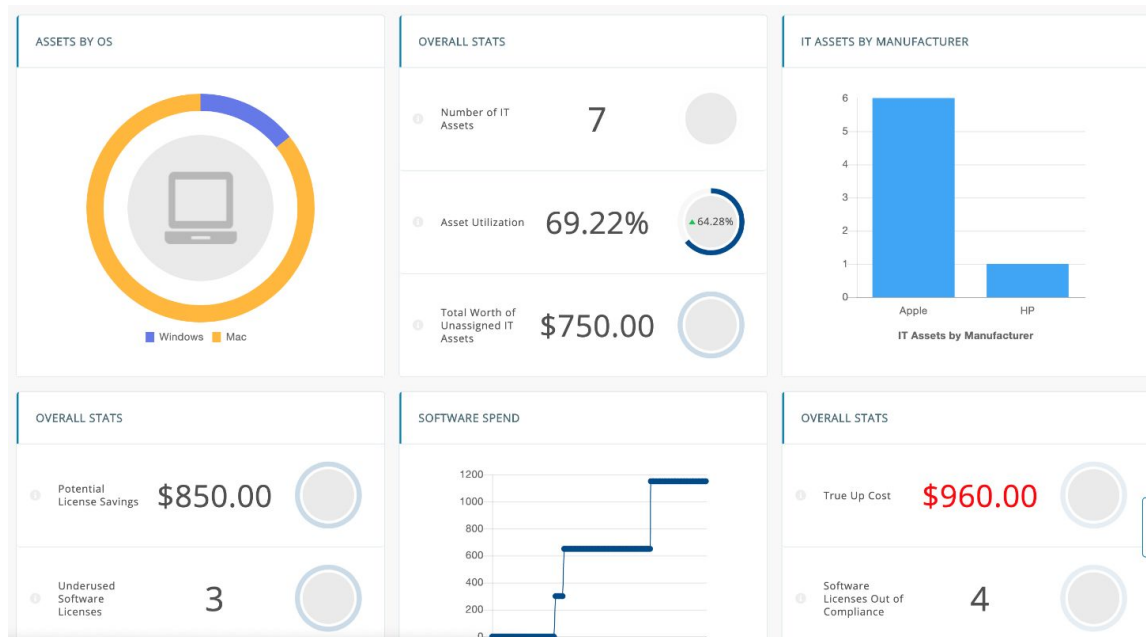
You can also set a License Availability Threshold that prompts you to purchase a new license when specified number of seats are left.

Software Licenses	
ALERT TYPES	
<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
<input checked="" type="checkbox"/>	License Availability Threshold



## 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.



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.

### Dashboard Settings

- ☒ Show KPIs/Metrics on dashboard
  - ☒ Software Licenses with payment due in 7 days ⓘ
  - ☒ Software Licenses expiring in 7 days ⓘ
  - ☒ Software Licenses Out of Compliance ⓘ
  - ☒ 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 ⓘ

## 8 Integrate with your service desk

Integrate your IT Asset management with service desks like Zendesk or Jira to track all of your ITSM workflows. As an example, let's set up the Zendesk integration:

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 guide on [Zendesk and AssetSonar integration](#).

## Explore integrations

### SERVICE DESKS

- Connect Zendesk with AssetSonar to link IT Assets & members with service desk tickets, end users & agents. [Learn more](#)
- Integrate AssetSonar with [Jira Cloud](#) and [Jira Server](#) for seamless issue tracking.

### MULTIPLE LOGIN OPTIONS

- Use **LDAP** credentials to log in. [Learn more](#)
- Integrate **G Suite** user directory to import members directly. [Learn more](#)
- Manage identity data of your employees with **SCIM** protocol using your AD. [Learn more](#)

### DEVICE MANAGEMENT

- Capture information regarding your Windows devices with Microsoft SCCM. [Learn more](#)
- Import and sync your Apple devices from Jamf. [Learn more](#)

### DATA BACKUP

- Take automatic, periodic data backups using AssetSonar.
- Sync your DropBox or OneDrive account with AssetSonar to backup your data.

### APIs

- Use our REST based APIs to access your IT Assets.

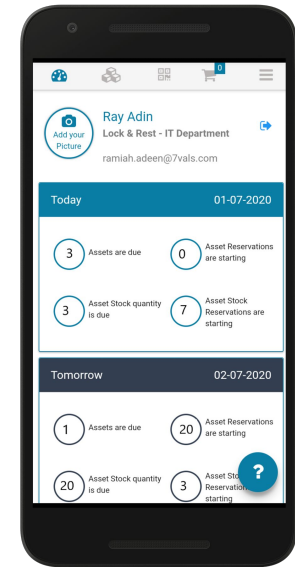
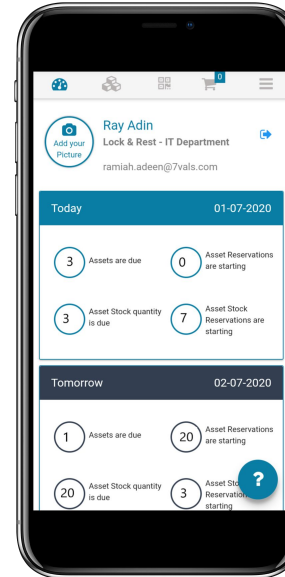
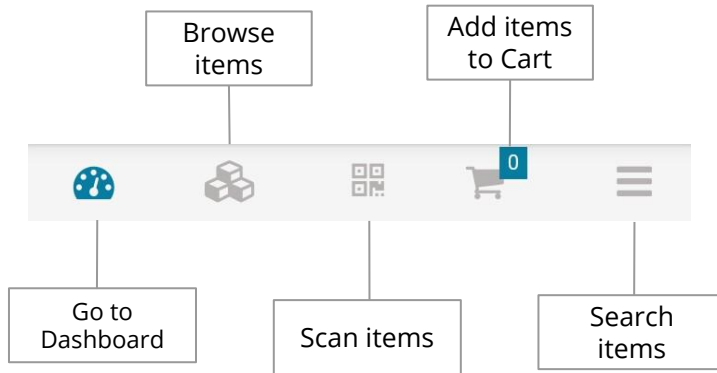
## 10 Take actions with the Mobile App

Pulling up IT Assets and taking actions becomes extremely convenient with the mobile app.

DOWNLOAD

For iPhone/iPad

For Android Phones & Tablets



## FOR MORE HELP

 <https://ezo.io/assetsonar/blog/>

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