



Quick Start Guide

IT Management On-Demand

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Introduction

Thank you for choosing SAManage, the leading on-demand IT Asset Management service, and the easiest way to manage your PC and software inventory. This guide will help you implement SAManage in your organization and gain better control over your IT assets.

This guide will demonstrate how easy it is to get up and running with SAManage. Because it is an on-demand service, there are no servers to provision, no software to maintain, and no databases to administrate. Additionally, with SAManage, you will not need to worry about running more software or backing up your data.

Suggested Success Criteria

We would like to help you realize maximum value from your SAManage solution, and suggest using the following criteria when choosing an IT Asset Management system for your company:

- 1) How quickly can you get started?
- 2) How easy it is to use and administer?
- 3) How do you view updated configurations, so you know what you have?
- 4) Can you consolidate all your contracts, leases, and software licenses?
- 5) Does it provide value-added services, such as risks detection?

Getting Help

If you need help, we are at your service. You can [search our online knowledgebase](#), which includes answers to the most commonly-asked questions, and is updated daily by our technical support team. Or, you can contact our support team by emailing support@samanage.com, or submitting an [online support ticket](#). We will get back to you within a few hours during our normal business hours (Mon. – Fri., 8AM -5PM PST), or the following day if your request is received after hours.



**FREE
30 Days
Trial**

**Sign up and get your
fully functional
SAManage account.**

Try it for FREE >

Getting Started

Getting started with SAManage is simple:

1. Sign-up for SAManage online by visiting www.samanage.com.
2. You will receive a confirmation email that includes an activation link, which will verify that we have the correct email address on file for your account.
3. Click on the link to activate your account.
4. Choose a new password.

These few quick steps are all you need to successfully complete the activation of your new SAManage account!

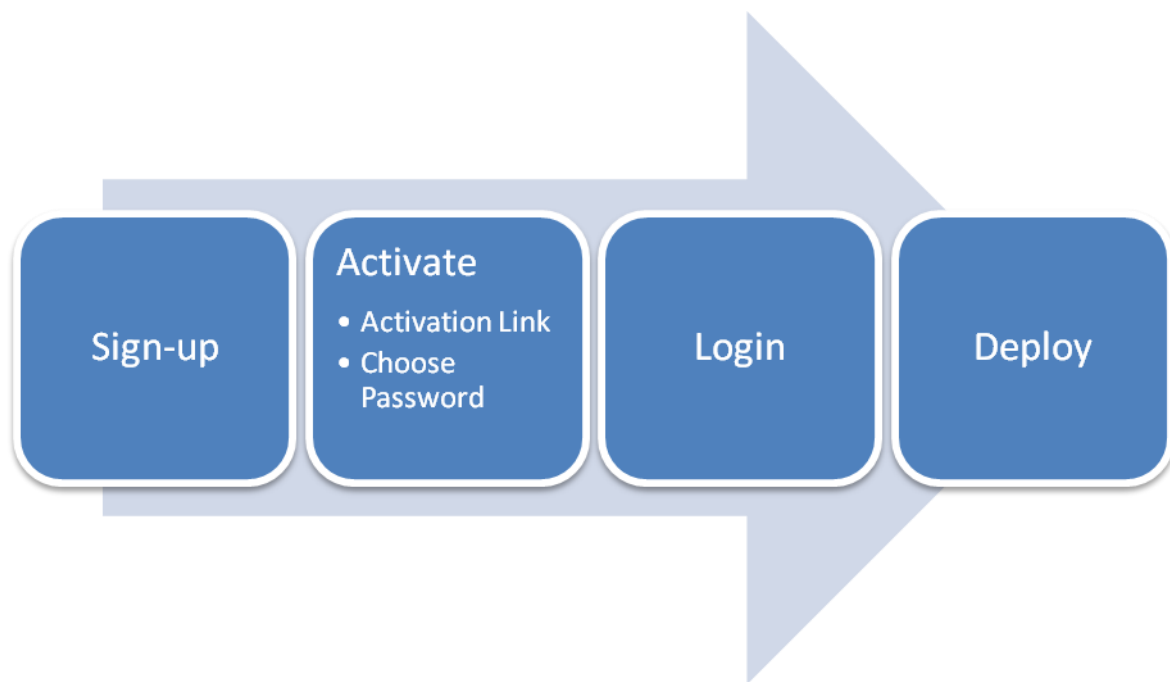
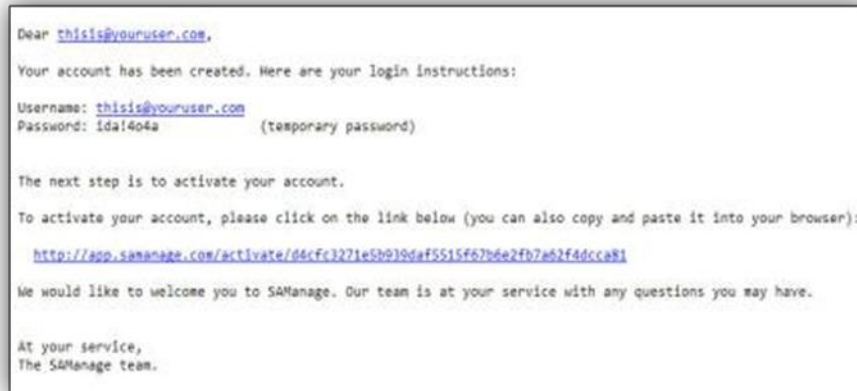


Figure 1: SAManage Activation Process

Activate Your New Account

Open the activation email received from activation@samanage.com. It should look like this:



Click on the link within the email to activate your new account.

Choose a new password for your account.

When you're finished, you will receive a confirmation email that your account is now active.

Log into Your Online Account

You can now log into your new account by visiting the [customer login page](#). When the screen on the right appears, please enter your username (**your email address**) and the password you chose to login into SAManage.

Spam Filters: If you signed up for the SAManage service, but did not receive an activation email, please check your spam folder to make sure it was not mistaken for spam. To ensure that you promptly receive all messages from us in the future, mark activation@samanage.com and support@samanage.com as “safe senders” in your email software.

If you have any questions, please [contact our support team](#).

Planning Your Deployment

SAManage uses a small footprint agent, which is installed on every workstation, laptop, or server that you wish to manage online. The agent requires no user intervention, and periodically collects and reports the local computer inventory to our servers. This process allows you to easily keep track of mobile and remote computers that do not visit your office frequently.

There are many ways to deploy SAManage across your network. As a best practice, we recommend using our Deployment Tool, Domain Logon Scripts or Active Directory GPO. For additional instructions and examples, please visit the [online deployment guides](#).

Deployment Approach	Recommended for:	Best Practice
Deployment Tool	Remote, enterprise wide deployment	√
Domain Logon Script	Large Networks (requires local administrator rights)	√
Active Directory GPO	Large Networks	√
Software Distribution tools	Large Networks	
Email based	No AD/Domain, many remote users/branches	

Finding Your Account Name

When you deploy an agent, you will be required to enter an **account name**. Your account name is the name you chose when you signed up for SAManage. When your agents report their inventory to our secure data center, they authenticate the information using the account name. When you logon to SAManage, your account name **can be found at the top right corner of your screen, next to “My Account”**:



Performing a Test Deployment

SAManage gives you the ability to perform a test deployment and install the SAManage agent on your local computer. To get started, download the deployment tool and install it on your computer:

- [Download the Deployment Tool setup file](#), and save it on your computer.
- Launch the Setup Wizard.
- Click “**Next>>**”, “**I Agree**”, “**Next>>**”, and “**Install**” to install the deployment tool.
- When the Setup Wizard completes, click “**Finish**” to launch the deployment tool.

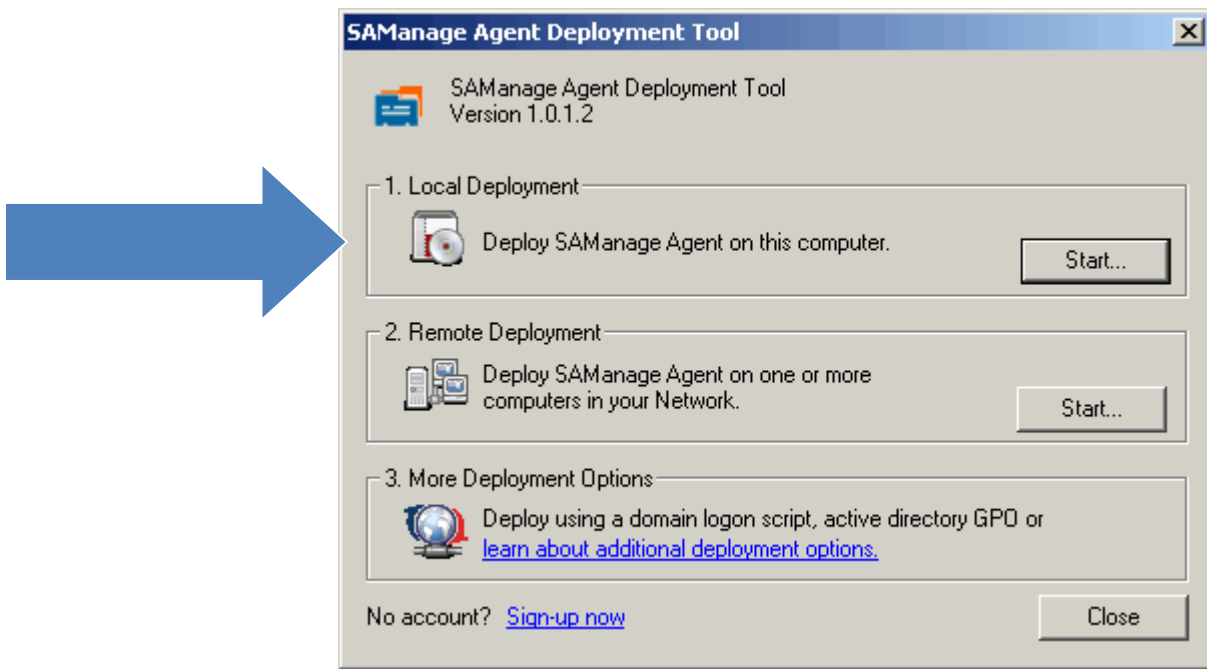


Figure 2: SAManage Deployment Tool

- Select “**1. Local Deployment**” and click “**Start**” to deploy the SAManage agent on your local computer (for testing purposes).

Please note that this is a manual procedure for testing purposes only. When deploying SAManage across your network using the Remote Deployment option, you will use the silent unattended deployment which is completely automatic and requires no user intervention.

- Click “**Next>**” and “**I Agree**”.

- When you see the agent set up screen (below), please enter your **Account Name**, and click “**Next>**” and “**Install**” to install the agent on your local computer.

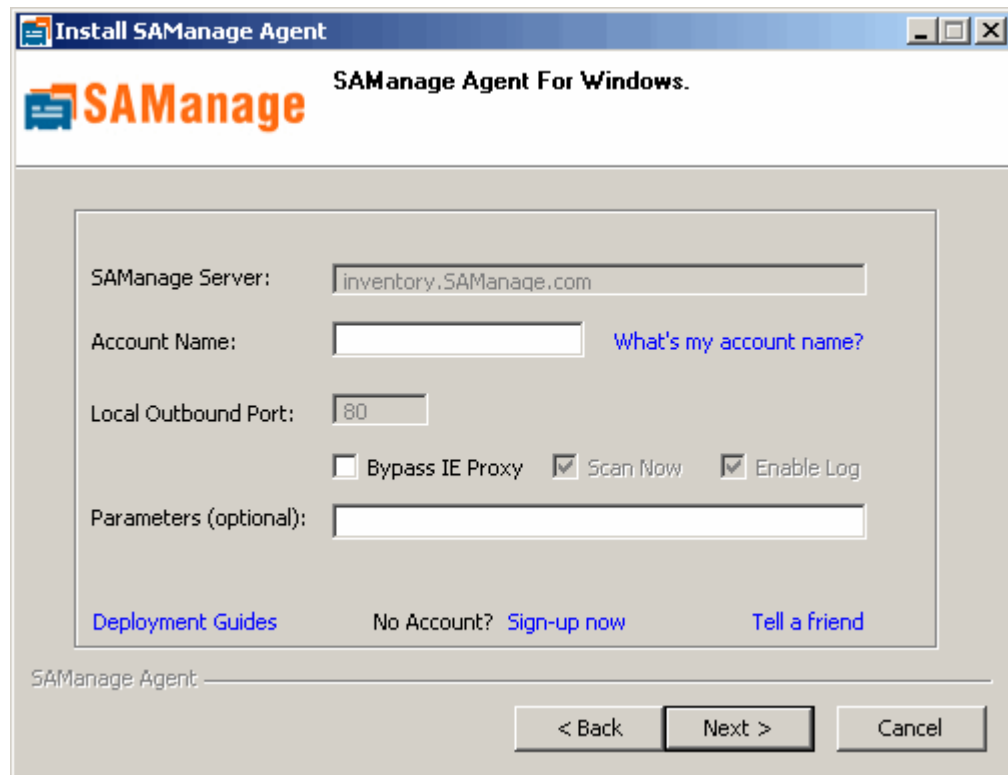


Figure 3: SAManage Manual Agent Setup

- The agent will run, and then report your local computer inventory to our server. Please note that it takes a few minutes for new inventory to appear in your online account.
- [Login to your online account](#) to view your local computer inventory.

Locating the Agent on Your Computer

The SAManage agent operates as a “silent agent”, without requiring any user intervention. It executes as a Windows service and automatically initiates an inventory update periodically – you will not notice anything as this takes place. You can locate the agent on your local computer through the “Add/Remove Programs” facility, or by browsing the “Program Files\SAManage” folder.

Enterprise Deployment Options

Remote Deployment Tool

The Remote Deployment tool simplifies the management of large corporate installations of SAManage. With the deployment tool, you can remotely deploy the SAManage agent on all computers in your network using your domain administrator credentials. Please follow these steps:

- [Download the Deployment Tool setup file](#), and save it on your computer.
- Launch the Setup Wizard.
- Click “**Next>>**”, “**I Agree**”, “**Next>>**”, and “**Install**” to install the deployment tool.
- When the Setup Wizard completes, click “**Finish**” to launch the deployment tool.

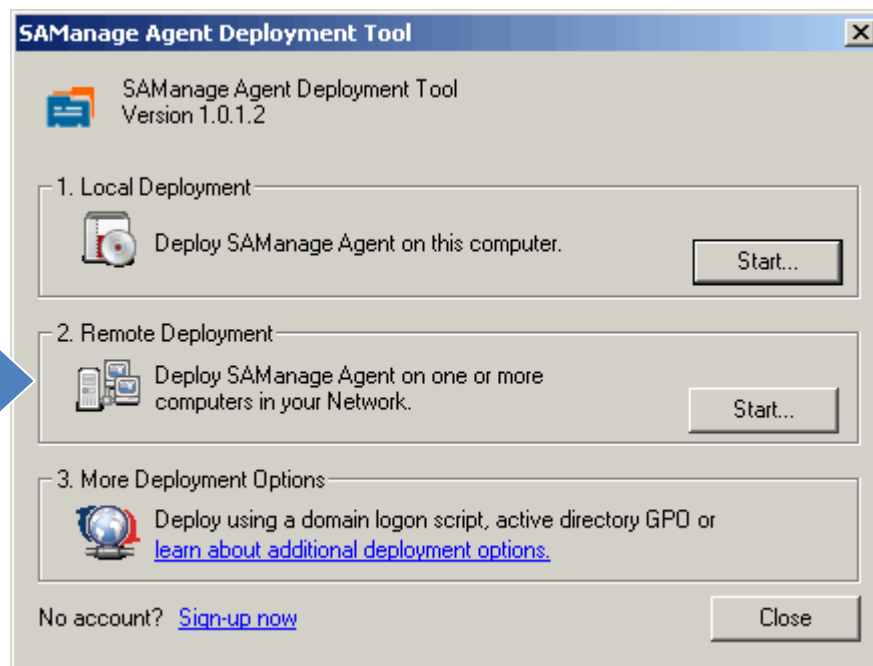


Figure 4: SAManage Deployment Tool

- Select “**2. Remote Deployment**” and click “**Start...**” to begin.

- **Select hosts in your network** by specifying an IP range (**From - To**), or click on the "Selected hosts..." option and "+" to select hosts from your network. You can select hosts from multiple domains or workgroups and add them to the list, or import a list of hosts from a CSV file.
- Click "**Next >>**" when you are done selecting your hosts.

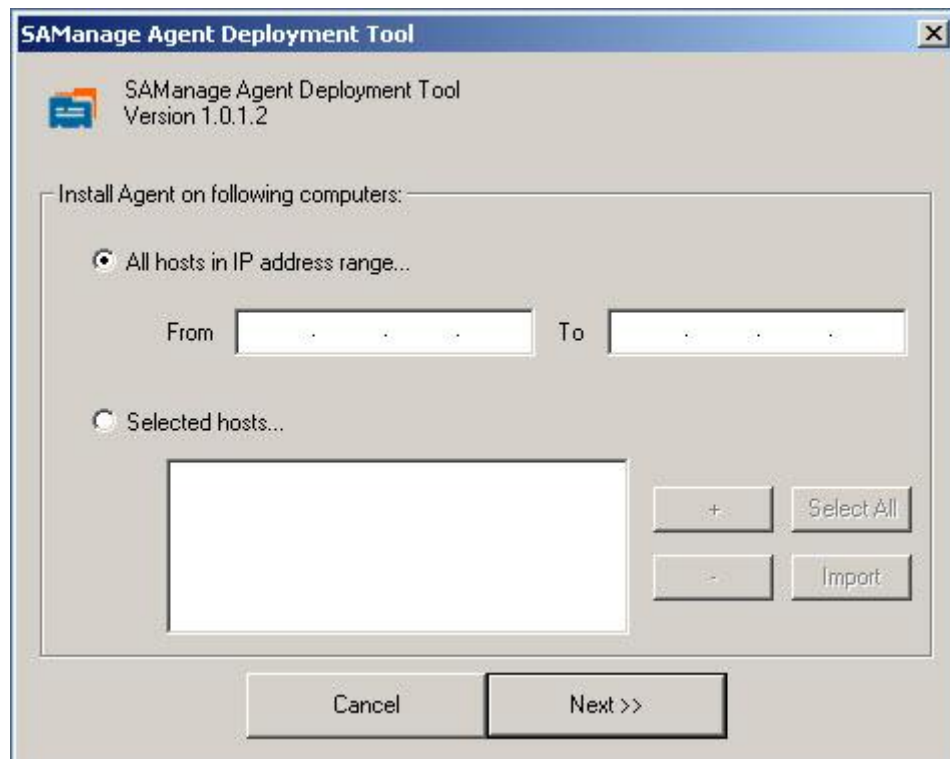


Figure 5: SAManage Deployment Tool - Select Hosts

- Enter the **SAManage account name** you selected during sign up. If you've forgotten your account name, click [here to locate it](#).
- Click "**Next >>**" once you have entered your SAManage account name.

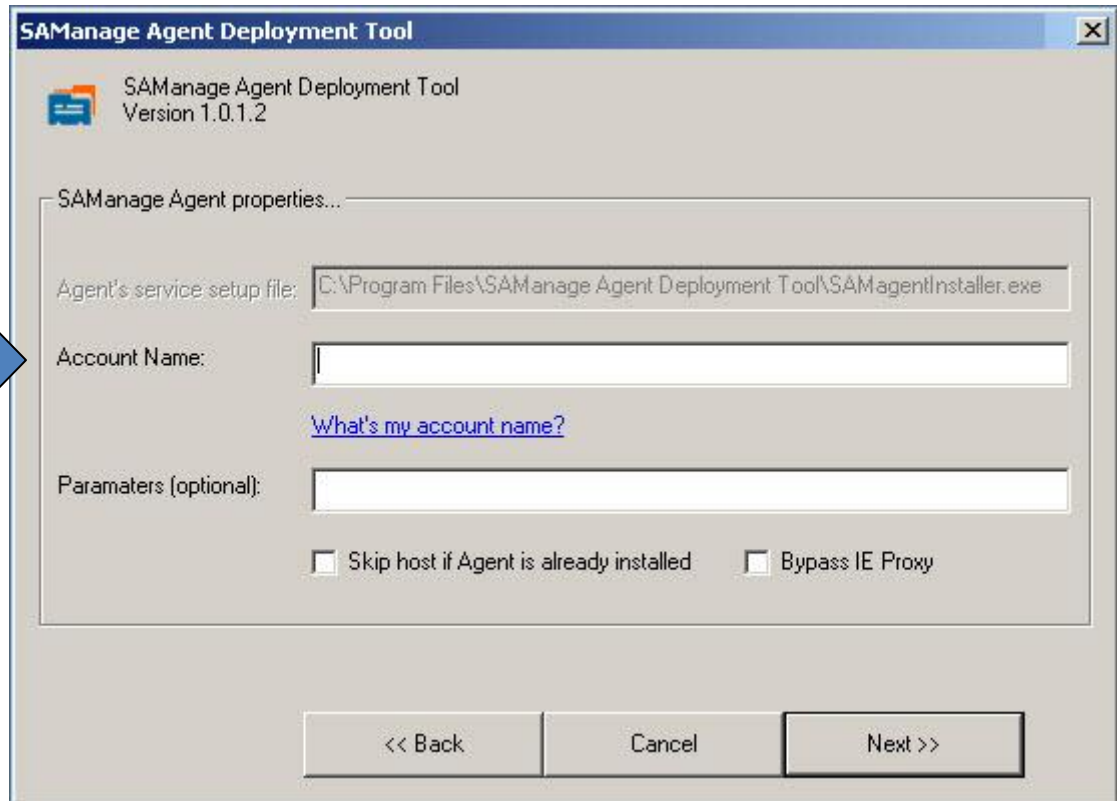


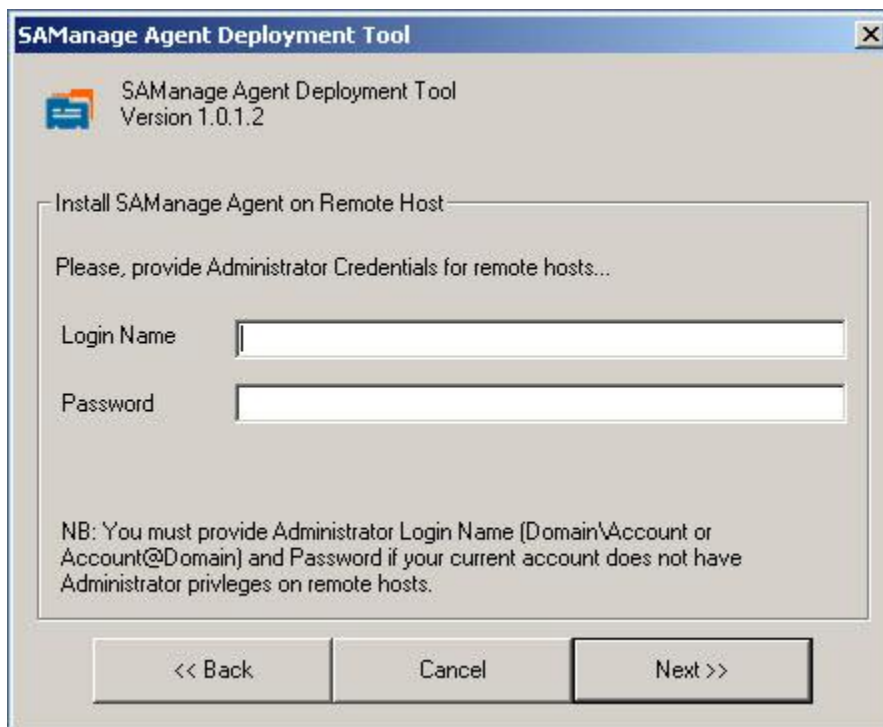
Figure 6: SAManage Deployment Tool – Account Setup

Note: You can execute the Deployment Tool multiple times, to deploy SAManage on any computers that were not connected to your network during previous executions. Simply check the "Skip hosts if agent is already installed" option.

- **Enter your Domain Administrator credentials** (Domain\Account or Account@Domain) to use during the remote deployment. These credentials will be used to remotely login to the specified computers and deploy the agent.

The Deployment Tool does not store your credentials, and does not transmit any data to SAManage.

- Click “**Next >>**” when you are done entering your credentials.



SAManage Agent Deployment Tool

SAManage Agent Deployment Tool
Version 1.0.1.2

Install SAManage Agent on Remote Host

Please, provide Administrator Credentials for remote hosts...

Login Name

Password

NB: You must provide Administrator Login Name (Domain\Account or Account@Domain) and Password if your current account does not have Administrator privileges on remote hosts.

<< Back Cancel Next >>

Figure 7: SAManage Deployment Tool - Domain Credentials

- **Click "Start!" to begin the remote deployment.** You can adjust the speed of deployment by shifting the "Bandwidth usage" scale. At the end of deployment, you can save the log file for future reference.

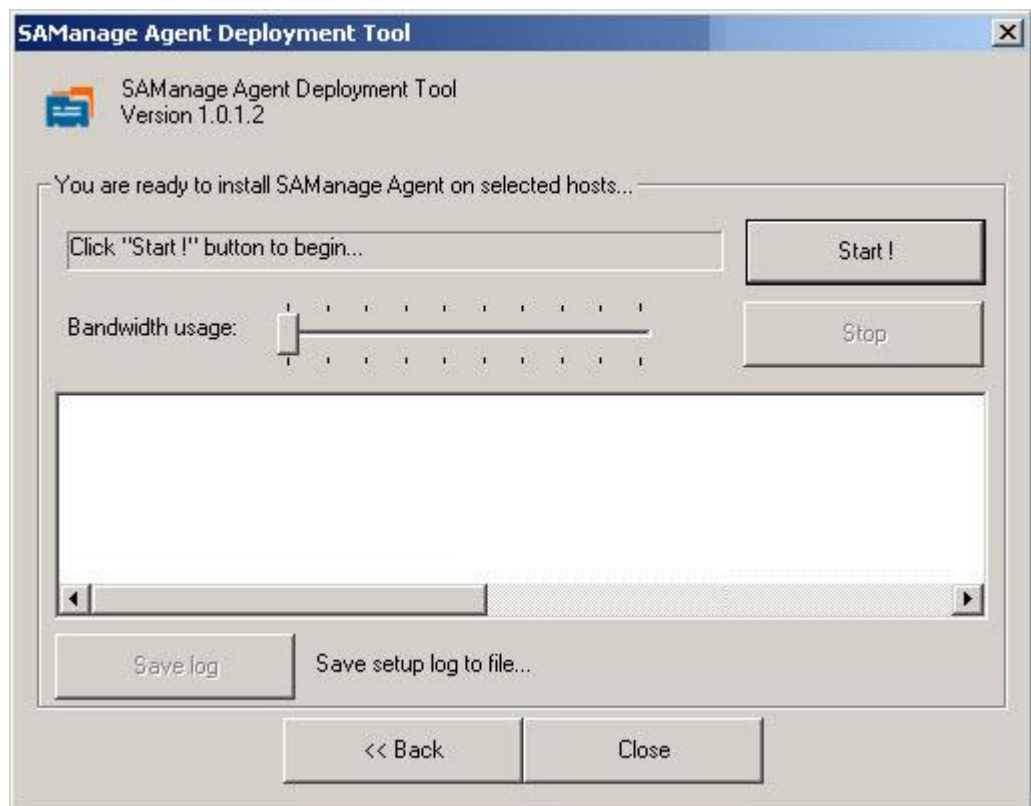


Figure 8: SAManage Deployment Tool - Launch

- **Optional:** Add a domain logon script (see below) to deploy the agent on computers that are not currently in your network or on new computers you provision in the future.

Domain Logon Script

The Domain Logon Script is an effective way to deploy agents across your computers. The script will automatically deploy the agent on any computer that logs into that domain, first checking to make sure that the agent was not previously deployed. Please follow the steps below:

Note: Local Administrator rights are required. You can only deploy the agent using logon scripts if your local user accounts have **local administrator rights** on their computers.

- [Download the SAManage Agent setup file](#) and save it on your local computer.
- Copy the agent setup file to a shared network folder (for example [\\NETLOGON](#)).
- Modify your existing domain logon script, or use the script below:

```
@echo off
REM === Agent already installed on the computer? =====
if exist "C:\Program Files\SAManage\*.EXE" goto END
REM === Installing agent in silent mode =====
\\SERVER\FOLDER\SAMagentInstaller.exe /TAG:ACCOUNTNAME /force /s /nosplash /debug
REM === Script done, exiting =====
:END
Exit
```

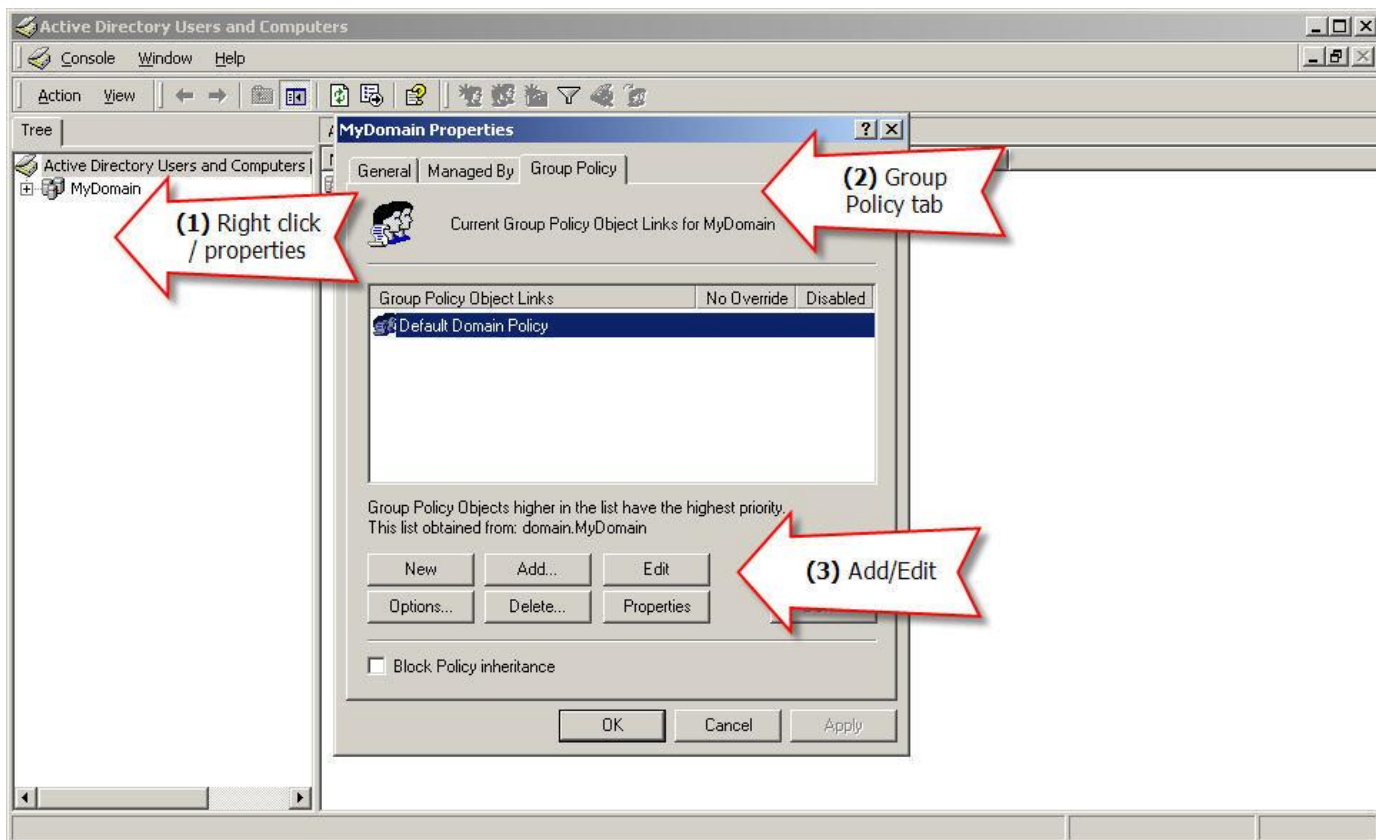
Modify the relevant values as follows:

- **SERVER** and **FOLDER** are your server name and shared folder name (for example [\\SERVER\NETLOGON](#)). Verify that the agent setup file is stored in the shared folder.
- **ACCOUNTNAME** is the name you selected for your SAManage account when you signed up. Please see page 5 of this guide for instructions on finding your account name.

Active Directory GPO

Use the Active Directory Group Policy Option (GPO) to deploy the SAManage agent automatically on all computers that join the domain. Please follow the steps below:

- [Download the SAManage Agent setup file](#) and save it on your local computer.
- Copy the agent setup file to a shared network folder (for example [\\NETLOGON](#)).
- Open the “Active Directory users and computers” tool (Start | Programs | Administrative tools | Active directory users and computers).
- Right click on your Active Directory Domain or OU, and select “Properties”.
- Click the “Group Policy” tab.
- Add a new policy, or edit an existing one.



- Expand “Computer Configuration” and “Windows Settings”, and select “Scripts” (Startup / Shutdown).
- Double click on the “Startup” option.
- Click on “Show Files” in the “Startup Properties” dialog box.

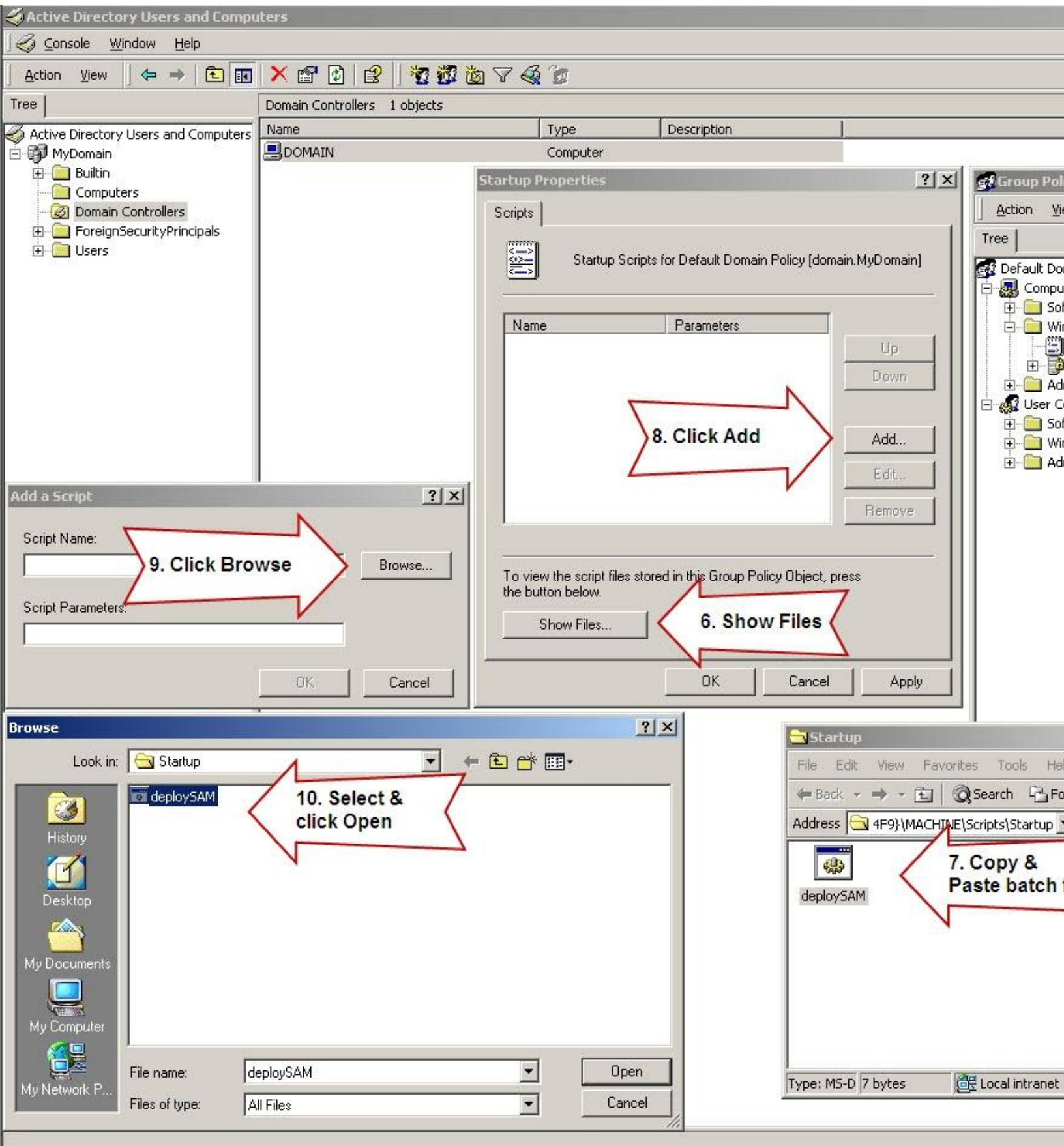
- Create a new batch file that will deploy the agent on any computer that joins the domain, if the agent was not previously deployed. Here is an example:

```
@echo off
REM === Agent already installed on the computer? =====
if exist "C:\Program Files\SAManage\*.EXE" goto END
REM === Installing agent in silent mode =====
\\SERVER\FOLDER\SAMagentInstaller.exe /TAG:ACCOUNTNAME /force /s /nosplash /debug
REM === Script done =====
:END
Exit
```

Modify the relevant values as follows:

- **SERVER** and **FOLDER** are your server name and shared folder name (for example \\SERVER\NETLOGON). Verify that the agent setup file is located in the shared folder.
- **ACCOUNTNAME** is the name you selected for your SAManage account when you signed up. See page #5 of this guide for instructions on finding your account name.

- Save the batch file on your desktop as **deploySAM.bat**.
- Copy and paste **deploySAM.bat** from your desktop to the Script Startup folder.
- In the “Startup Properties” dialog box, click “Add”.
- In the “Add a Script” dialog box, click “Browse”.
- Select the **deploySAM.bat** batch file and click “Open”.
- Click “OK” on the “Add a Script” dialog box, and “OK” on the “Startup Properties” dialog box, then close all open dialogs and the Active Directory snap-in. When the computer starts, the script will deploy the agent if it was not previously installed.



Software Distribution Tools

You can use an existing software distribution tool (such as Microsoft SMS) to quickly deploy the agents across your computers. Download the agent setup file as shown above, and use the following command to distribute it:

```
SAMagentInstaller.exe /TAG:ACCOUNTNAME /s /nosplash /debug /force
```

Please note that you can also set your distribution tool to look for the existence of the folder `C:\Program Files\SAManage`, so that it will deploy the agent on new computers added to your network.

More Ways to Deploy

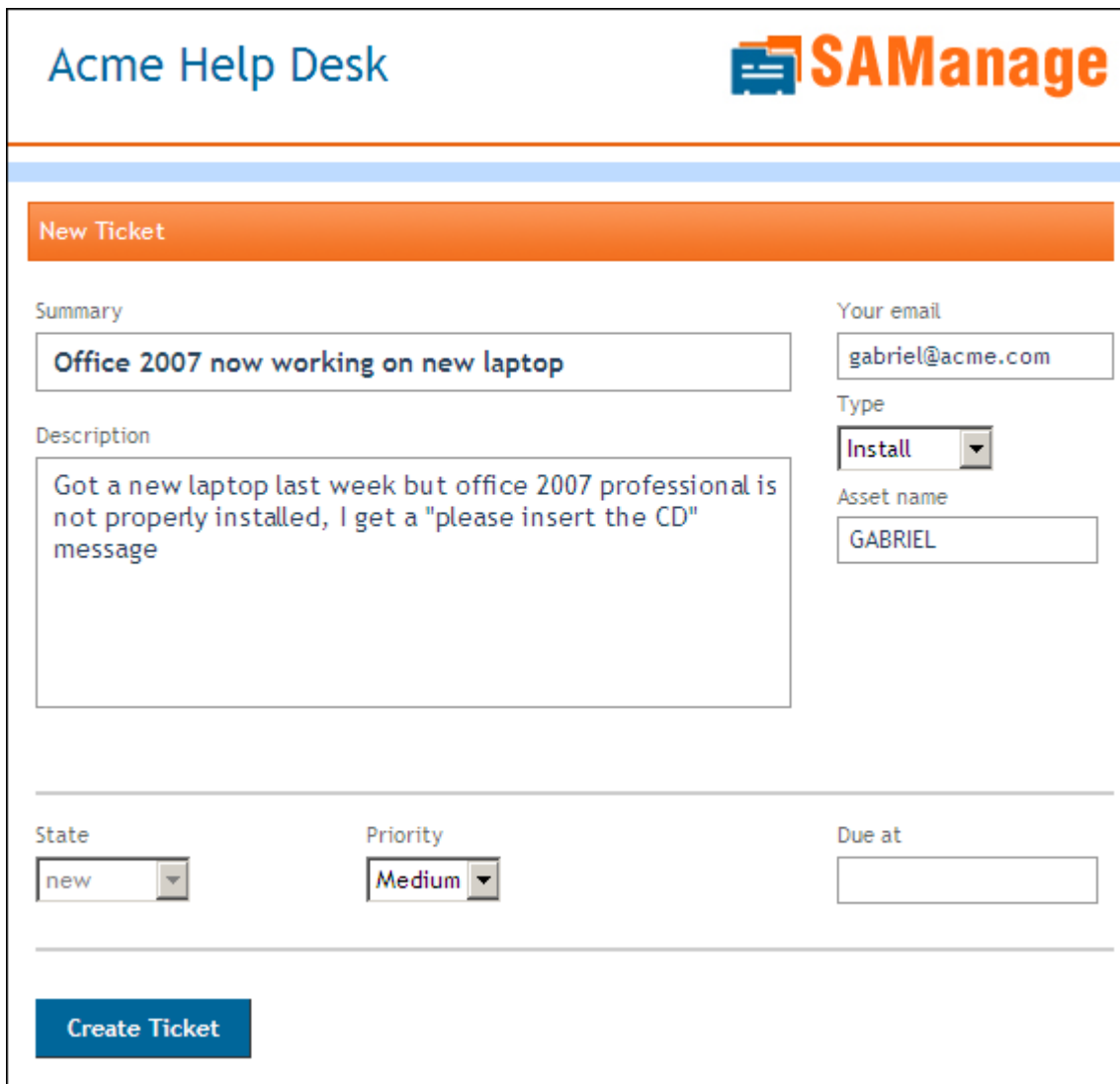
For additional ways to deploy the agents across your computers, and for the most updated best practices and tips, please visit the [online deployment guides](#) on our website.

Setup Your New Help Desk

SAManage comes with an integrated Help Desk that you can use to receive support requests from your end-users through a personalized support portal. You can manage and distribute tickets among team members and associate tickets with assets (computers or software). By providing quick access to an asset's current hardware configuration and service history from a single console, you can reduce the time it takes to resolve support requests and provide better service to your users.

To customize your new Help Desk portal, click on "[Setup](#)" and then click "[Help Desk](#)". You can customize the following:

- **End-User Portal** – empower your users to submit tickets via a branded help-desk portal. Select a simple, easy-to-remember address that redirects to your private ticket submission URL. Ask your network administrator to create a sub-domain CNAME record (for example, **support.SAManage.com**) that redirects to this URL.
- **Brand Your Portal** - you can customize the name of your portal and upload your logo.
- **Ticket Types and Auto-Assignment Rules** – we automatically create a few ticket types for you. You can add, delete, or rename the types, and set the default assignee for each type to streamline your support process.
- **Time Zone** – select the default time zone for your help desk.



The screenshot displays the 'Acme Help Desk' interface for SAManage. At the top, the title 'Acme Help Desk' is on the left and the SAManage logo is on the right. Below the header is a blue bar, followed by an orange bar labeled 'New Ticket'. The form is divided into several sections:

- Summary:** A text input field containing 'Office 2007 now working on new laptop'.
- Description:** A larger text area containing 'Got a new laptop last week but office 2007 professional is not properly installed, I get a "please insert the CD" message'.
- Your email:** A text input field containing 'gabriel@acme.com'.
- Type:** A dropdown menu with 'Install' selected.
- Asset name:** A text input field containing 'GABRIEL'.
- State:** A dropdown menu with 'new' selected.
- Priority:** A dropdown menu with 'Medium' selected.
- Due at:** An empty text input field.

At the bottom left of the form is a blue button labeled 'Create Ticket'.

Figure 9: Personalized Help Desk page

Next Steps

The agents automatically report their local inventory to our secure data center. You can [login to your online account](#) to [view your PC inventory](#) and much more. Please note that it might take a while for all your agents to report, depending on the deployment approach you chose.

Please explore the [Contracts](#), [Risks and License Compliance](#), the [Help Desk](#) and the [reports](#). We are confident you will find SAManage to be the leading on-demand IT Management service available, and we look forward to help you better manage your IT environment.

The SAManage Support Team is at your service. Contact us whenever you need us at support@samanage.com.