



S O N A R

SONAR User manual

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You can find the latest documentation for this product here: <http://sonar-raas.com>

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1 Organization registration

Before you can use SONAR you need to register your organization with the SONAR portal. Registration will allow you to download the SONAR client, collect information and generate reports.

Note: When you register your organization you are automatically added to the Admin role group. For more information refer to the Roles & permissions section in Chapter 4 of this document.

1. Navigate to the SONAR portal at the following URL: <https://portal.sonar-raas.com>. Click the **Register here** link.



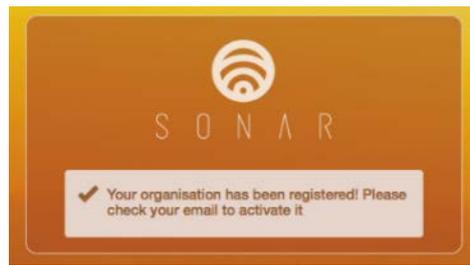
The image shows the SONAR login form. It features the SONAR logo at the top. Below the logo are three input fields: 'organisation name', 'email', and 'password', each with a 'required' label. A 'Forgotten your password?' link is positioned below the password field. At the bottom left, there is a 'remember me' checkbox. At the bottom right, there is a 'sign in' button. At the very bottom, there is a link that says 'Don't have an account? Register here'.

2. Complete the registration form. Once completed, click **Register**. Please note all fields are required.



The image shows the SONAR registration form. It features the SONAR logo at the top. Below the logo are several input fields: 'first name', 'last name', 'organisation name', 'email', 'country' (with a dropdown menu showing 'United Kingdom'), 'password', and 'verify password'. There is a CAPTCHA section with a blue 'SLIICS' logo and the text 'Please enter the text in the image above'. Below the CAPTCHA is a 'required' label and a text input field. At the bottom left, there is a checkbox for 'I agree to the terms and conditions'. At the bottom right, there is a 'register' button. At the very bottom, there is a link that says 'Already have an account? Sign in'.

4. Once registered, an activation email will be sent to the email address entered on the registration form.



5. Click the link provided in the email to successfully activate the organization account. This will enable login to the SONAR portal.



1.1 Forgotten password

If you have forgotten your password you can request a password reset. Complete the following steps to reset a password.

1. On the login screen of the SONAR portal, click the **Forgotten your password?** link.

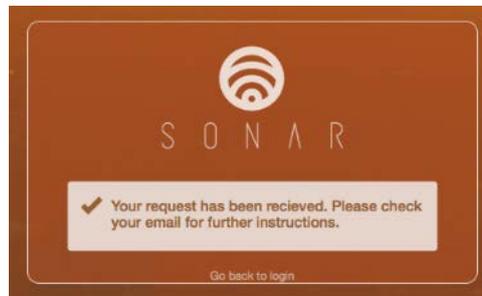


2. Enter your **organization name** and **email** address. Click **reset password**.



The image shows a password reset request form on the SONAR platform. At the top is the SONAR logo. Below it, the text reads: "Please enter your organisation name and email address in the form below and we will email you password reset instructions." There are two input fields: "organisation name" and "email", both with a "required" label. A "reset password" button is located at the bottom right of the form.

3. A confirmation message will be displayed. Check your email for an automated message from the SONAR platform.



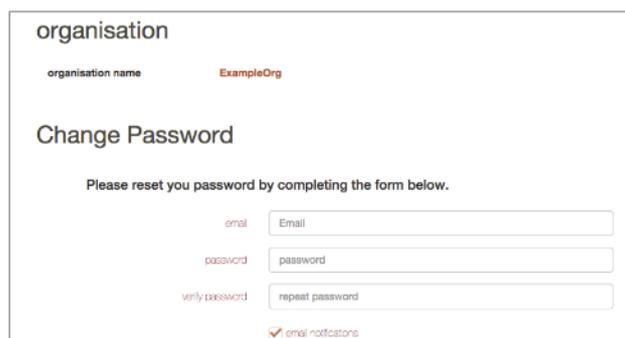
The image shows a confirmation message on the SONAR platform. At the top is the SONAR logo. Below it, the text reads: "Your request has been recieved. Please check your email for further instructions." There is a "Go back to login" link at the bottom of the message.

4. When the email arrives, click the link to reset your password; a browser window will open.



The image shows an email password change request. At the top is the SONAR logo. Below it, the text reads: "Password Change Request" and "You have requested to reset your password for SONAR." There is a link to "click here" to complete the password reset. At the bottom, the email address "sonar-raas.com" and the company name "xtravirt" are displayed.

5. Enter your email address and a new password. Click the **save** button. You will then be redirected to the portal login page.



The image shows a password change form on the SONAR platform. At the top is the SONAR logo. Below it, the text reads: "organisation" and "organisation name ExampleOrg". The form is titled "Change Password" and contains the text: "Please reset you password by completing the form below." There are three input fields: "email" (with "Email" as a placeholder), "password" (with "password" as a placeholder), and "verify password" (with "repeat password" as a placeholder). There is a "save" button at the bottom right of the form.

2 The SONAR portal

2.1 Roles & permissions

The SONAR portal supports two types of roles – **General User** and **General Admin**.

2.1.1 General User

The User role is the common role group that your users should belong to. It allows users to do the following:

- Login to the portal
- Manage their own user account
- Ability to download the SONAR client and associated collateral
- Access the FAQ & raise support tickets
- Collect data with the SONAR Client and upload to the SONAR portal
- Generate reports from the SONAR client

2.1.2 General Admin

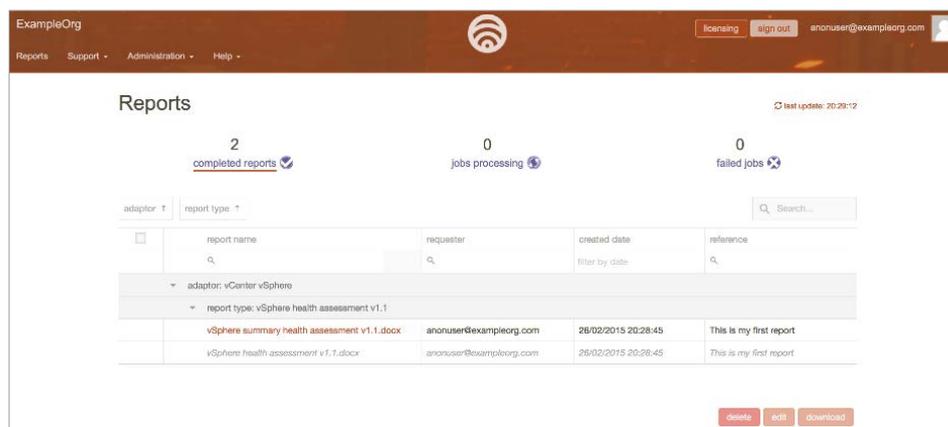
The Administrator account has the same permissions as the User role as well as additionally being able to do the following:

- Manage organization user accounts (add/delete/disable)

Note: By default, the first user account for an organization is a member of the General Admin role group.

2.2 Reports menu

The Reports menu contains a single entry, the **Reports** page. It is comprised of 3 views, each accessed by clicking the relevant link above the table.



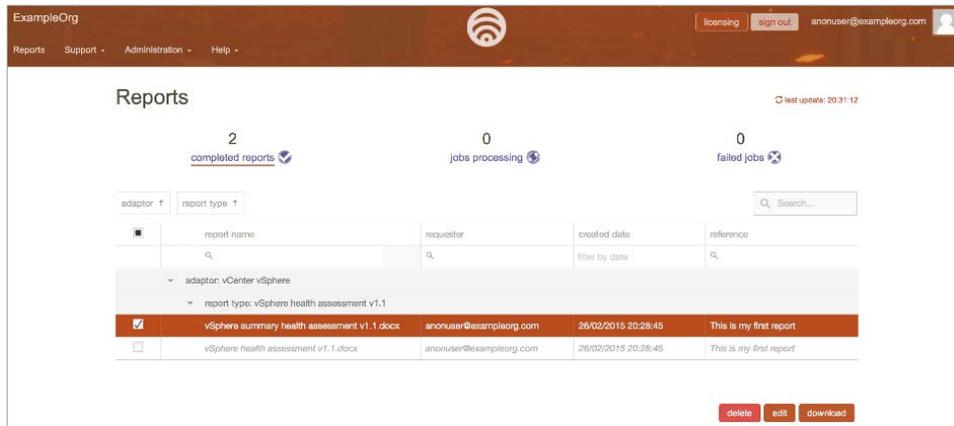
report name	requester	created date	reference
vSphere summary health assessment v1.1.docx	anonuser@exampleorg.com	28/02/2015 20:28:45	This is my first report
vSphere health assessment v1.1.docx	anonuser@exampleorg.com	28/02/2015 20:28:45	This is my first report

2.2.1 Completed reports

All reports that have been successfully generated can be found under the **completed reports** view. You can select reports to edit their reference, delete or download them.

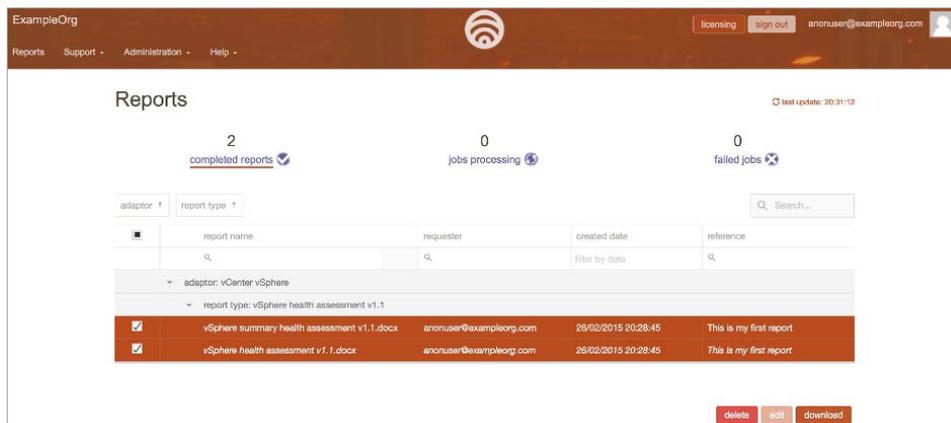
2.2.2 Download a single report

Find the report you wish to download. Select the report using the checkbox. Click the **download** button.



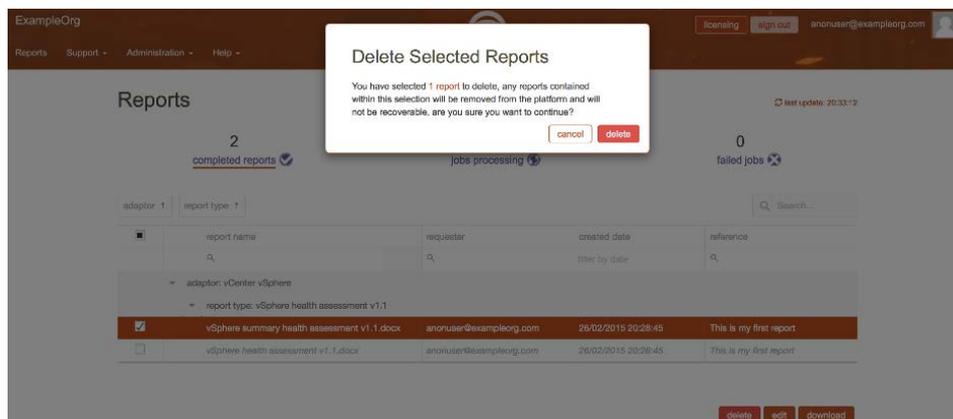
2.2.3 Download multiple reports

Find the reports you wish to download. Select each report using the checkbox. Click **download**. The selected reports will be automatically put into a zip file and you will be prompted to download.



2.2.4 Delete a single report

Select the report you wish to delete by ticking the checkbox next to the report. Click **delete**. A confirmation dialogue will appear. Click **delete** to confirm.



2.2.5 Delete multiple reports

Find the reports that you wish to delete. Select multiple reports by ticking the checkboxes. Click **delete**. A confirmation dialogue will appear. Click **delete** to confirm.

The screenshot shows the 'Reports' page in the ExampleOrg interface. At the top, there are navigation menus for Reports, Support, Administration, and Help. The page displays statistics: 2 completed reports, 0 jobs processing, and 0 failed jobs. Below these are filters for adaptor and report type, and a search box. A table lists reports with columns for report name, requester, created date, and reference. Two reports are selected with checkboxes:

	report name	requester	created date	reference
<input checked="" type="checkbox"/>	vSphere summary health assessment v1.1.docx	anonuser@exampleorg.com	26/02/2015 20:28:45	This is my first report
<input checked="" type="checkbox"/>	vSphere health assessment v1.1.docx	anonuser@exampleorg.com	26/02/2015 20:28:45	This is my first report

At the bottom right of the table, there are buttons for 'delete', 'edit', and 'download'.

2.2.6 Change a saved report name or reference information

Select the report you wish to edit the name or reference information by selecting the checkbox. Click the **edit** button. Edit the report name and reference information then click **save**.

The screenshot shows the 'Reports' page in the ExampleOrg interface. The table from the previous screenshot is shown, but only the first report is selected with a checkbox:

	report name	requester	created date	reference
<input checked="" type="checkbox"/>	vSphere summary health assessment v1.1.docx	anonuser@exampleorg.com	26/02/2015 20:28:45	This is my first report
<input type="checkbox"/>	vSphere health assessment v1.1.docx	anonuser@exampleorg.com	26/02/2015 20:28:45	This is my first report

The 'edit' button is highlighted in red at the bottom right of the table.

2.2.7 Searching for a report by keyword

Select the search box located above the table and enter the word or characters you want to search, then press **enter**. The list will auto-filter to display the results as well as highlighting instances of your search term within the results. To clear the search term, click the **x** icon in the search box.

The screenshot shows the 'Reports' page in the ExampleOrg interface. The search box above the table contains the text 'anonuser'. The table results are filtered to show only reports where the requester is 'anonuser':

	report name	requester	created date	reference
<input type="checkbox"/>	vSphere summary health assessment v1.1.docx	anonuser@exampleorg.com	26/02/2015 20:28:45	This is my first report
<input type="checkbox"/>	vSphere health assessment v1.1.docx	anonuser@exampleorg.com	26/02/2015 20:28:45	This is my first report

The search box at the top right contains 'anonuser' and a clear 'x' icon. The 'delete', 'edit', and 'download' buttons are visible at the bottom right of the table.

2.2.8 Filtering a column by a keyword

Enter the keyword within the column of the table you wish to filter press **enter**. The list will auto-filter to display the results. To clear the column filter, delete the text in the column filter box and press **enter**.



Jobs Processing

The jobs processing view (accessed by clicking on the 'jobs processing' link) lists all report processing jobs currently being run for your organization. When data is collected and uploaded to the SONAR platform, the platform service picks up the job and lists it here. Once the job is completed and the report has been generated the count will increase on the **completed reports** view.

Failed Jobs

Any job being run by the service that fails to successfully generate a report will be listed here.

2.3 Support menu

The Support menu provides access to software downloads and both client and platform support facilities.

2.3.1 Downloads

The **downloads** page contains various collateral items, including the SONAR client and user manual. The link at the top of the page will always download the latest client.



2.3.2 Getting Started

Displays the Getting Started page which appears when you log into the portal.

2.3.3 Buy Licenses

This link will send you to the online SONAR shop located on the sonar-raas.com website. From there you can purchase licenses and add-on features.

2.3.4 Support Tickets

If you need to report a bug, request a feature or have any general questions, you can raise a support ticket using the **Log a support ticket** online form.

Complete the form with as much information as possible. If possible, attach a screenshot or any other assets that may help the support team better understand your request. Click **create ticket**. A member of the SONAR support team will review your ticket as soon as possible.

2.4 Administration menu

The Administration menu allows users to the SONAR portal to amend their account details. If you are a member of the Admin role you can also manage user accounts for your organization from here.

2.4.1 My Profile

My Profile allows you to manage your account configuration, update account information and reset your password.

Updating account details

Update your first name, last name, email address and country location. Click **save**. If the details have been updated successfully, you will receive a confirmation message at the top of the screen.

Change Profile

✓ Success: details have been successfully updated.

profile picture
change profile picture (with Gravatar)

first name
sergio

last name
user

country
United Kingdom

email
sergio.user@example.org.com

change password

email notifications

You have previously agreed to our terms and conditions, if you would like to review them [click here](#)

save

Changing password

Click the 'change password' link. Enter your new password and then again for verification. Click **save** to update your password.

current password

password

verify password

cancel password change

email notifications

You have previously agreed to our terms and conditions, if you would like to review them [click here](#)

save

Configuring email notifications

If you wish to receive email notifications when a report has been generated, ensure that the **email notifications** checkbox box is ticked.

Changing your profile picture

You can change your profile picture that appears on the SONAR portal. To do so, you require a profile picture that has been created with the free Gravatar service (<http://gravatar.com>).

profile picture
change profile picture (with Gravatar)

2.4.2 User setup

Note, you will only see this menu item displayed if your account is configured as an Admin for your organization.

Adding new users

You can add additional users to your organization. Users can be members of either the User role or the Admin role. Click the **add user** button. Complete the **Add User form**. Ensure the **General User** role is selected. Click **save**.

The user will be emailed by the SONAR platform notifying that an account for them has been created with instructions for how to use.

The screenshot shows the 'Edit User' modal form. The background shows a table of current users with columns for email address, first name, last name, location, role, enabled, and email notifications. The 'add user' button is visible at the bottom left of the table.

Editing a user

Click the user you wish to edit. Click the **edit** button. When you have completed your changes, click the **save** button.

The screenshot shows the 'Add User' modal form. The background shows the same 'Current Users' table as in the previous screenshot. The 'add user' button is visible at the bottom left of the table.

Disabling a user account

Select the user you wish to disable. Click **disable** to save the change.

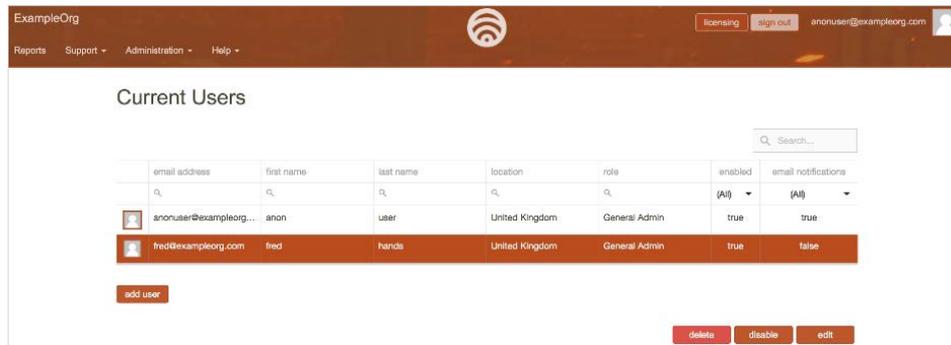
The screenshot shows the 'Current Users' table with the following data:

email address	first name	last name	location	role	enabled	email notifications
anonuser@exampleorg...	anon	user	United Kingdom	General Admin	true	true
fred@exampleorg.com	fred	hands	United Kingdom	General Admin	true	false

The 'disable' button is located at the bottom right of the table.

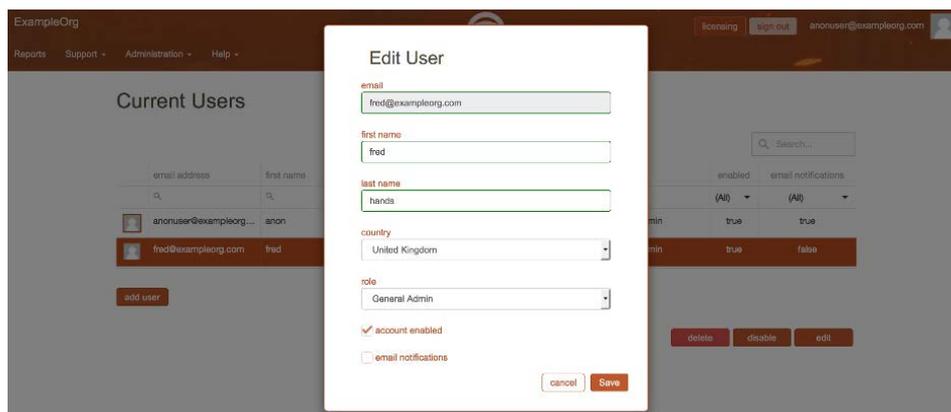
Deleting a user account

Select the user you wish to delete. Click **delete**. A confirmation dialogue will appear. Click **delete** to confirm.



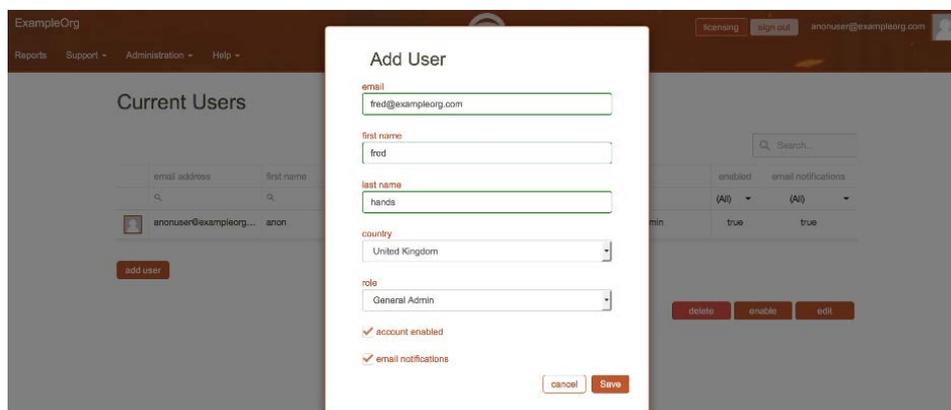
Configuring email notifications for a user account

Select a user and click **edit**. Tick the **email notifications** checkbox to enable notifications. Clear it to disable notifications. Click **save** to confirm the change.



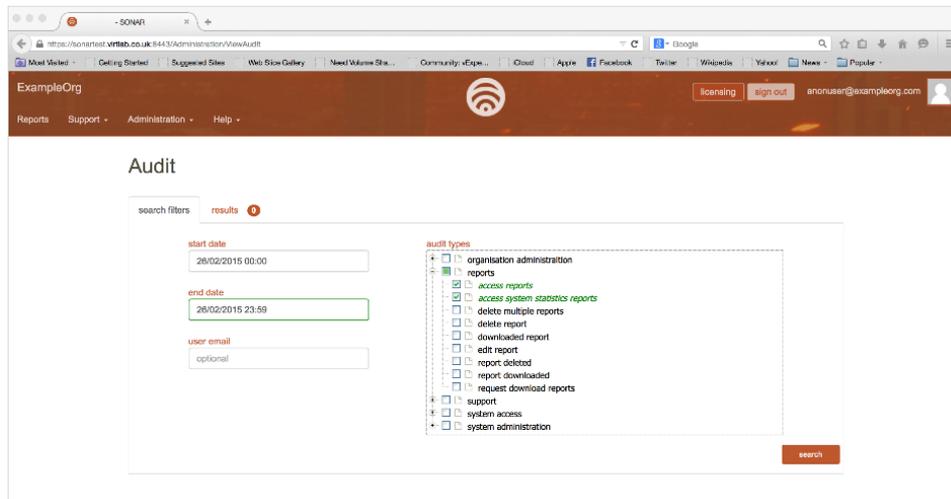
Configuring additional Admin users

1. Click **add user**. Complete the form. Ensure the role is set to **General Admin**. Click **save**.



Audit

The Audit menu allows you to review activities on the portal. Select a date range and a choice of audit types, then click **search**. Any results found will be displayed. Note: only users with a role of General Admin can access the Audit page.



2.5 Help menu

The Help menu provides access to the portal online help system as well as the About information dialog.

2.5.1 Help

The Help menu provides access to the portals online help system. To search the online Help system, enter your search term and press 'enter'. Click on a question in the list to expand it and see the answer.



2.5.2 About

The About dialog provides some basic information about the platform and your organization account. Your organization ID is found here which is required when purchasing licenses and upgrades. Administrators of your organization are also listed here.



2.6 Toolbar area

The toolbar area provides quick access to sign out of the platform, check licensing and obtain your Organization ID.

2.6.1 Licensing

Clicking the 'licensing' button will provide you a dialog that lists your organization's licenses.

License – the type of license, for example, vSphere

Current licenses – the number of licenses that you have purchased

Expiry – the expiry date of the license.



2.6.2 Sign Out

Clicking **Sign Out** will sign you out of the SONAR portal and return you to the login screen.

3 SONAR client

3.1 What is the SONAR client?

The SONAR client is used to select and generate SONAR reports, including configuring connections to infrastructure components, discovering and collecting data, and uploading to the SONAR platform for analytics and processing.

3.2 Client installation requirements

The following are required to successfully install and use the SONAR client.

- Physical or virtual machine
- Windows 7, Windows 8, Windows Server 2008 or Microsoft Server 2012
- 4GB Ram
- 1 Dual Core CPU
- Minimum 8GB disk space (more if you have a large infrastructure)
- Minimum supported screen resolution 1280 x 800
- Network Connectivity
- Direct internet connection
- Microsoft .Net Framework 4.5 SP1

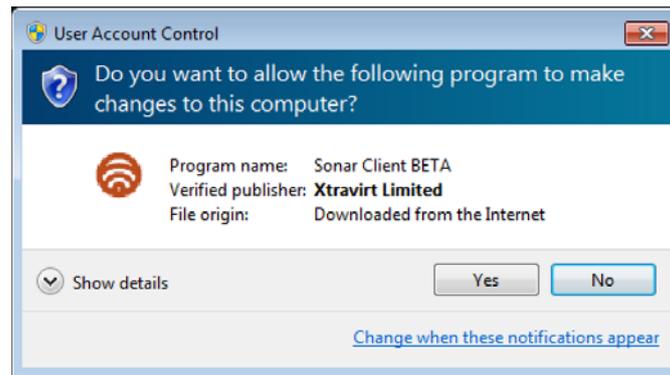
3.3 Downloading the latest client

Download the latest client from the **Downloads** page located in the **Support** menu of the portal. Click the link at the top of the **Downloads** page.



3.4 Installing the client

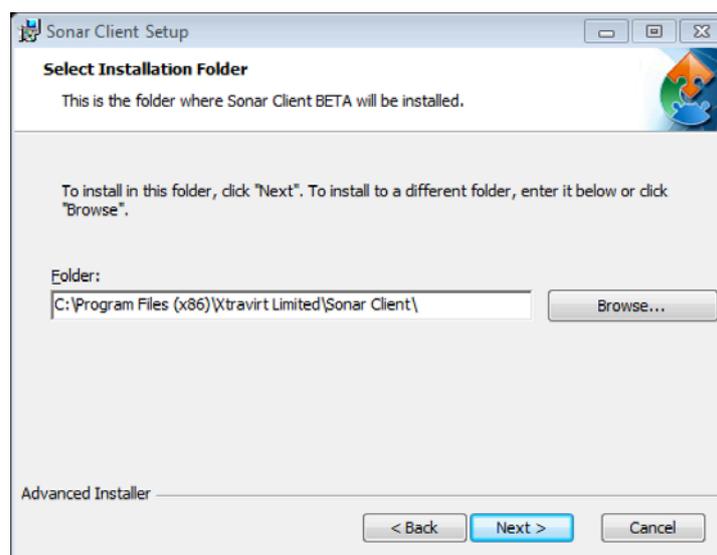
1. Extract the SONAR client zip file. Double-click the .exe file to start the installation.
2. Click **Yes** to start the installation.



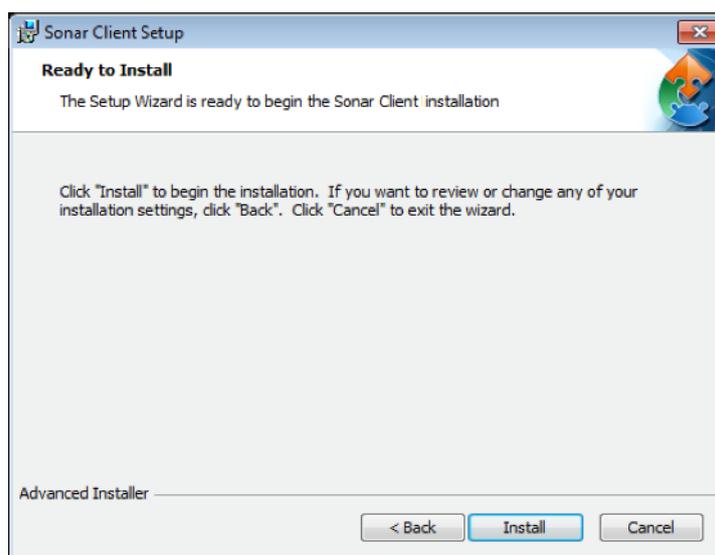
3. On the Welcome page click **Next**



4. Change the installation location or accept the default location (recommended). Click **Next** to continue.



5. Click **Install**



6. Click **Finish** to complete the installation.



3.5 Updating the client

Periodically new versions of the SONAR Client are released. It can be updated using the following two methods.

Method 1: Automated check at start-up

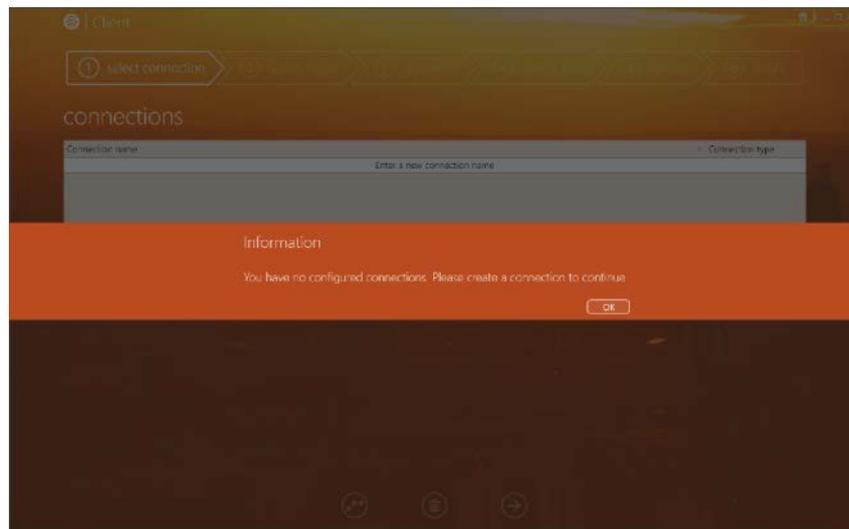
If connected to the Internet, the SONAR client will check for updates at start up. If any are available you will be prompted to download and install.

Method 2: Manual check

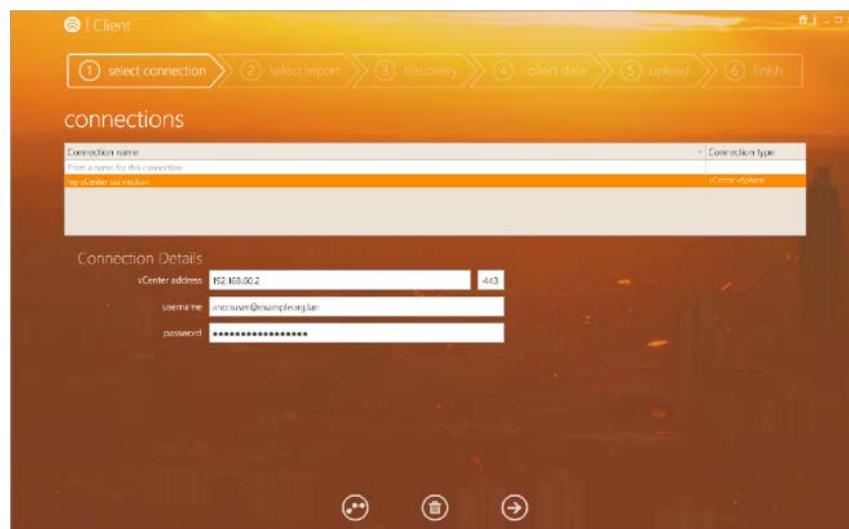
To manually check for a newer version of the client sign in to the SONAR portal. If a newer version exists, download and follow the installation previous instructions to update to the latest version.

3.6 Generating a report

1. Launch the SONAR client. If you have no existing connections you will be prompted to create one. Click **Ok**.



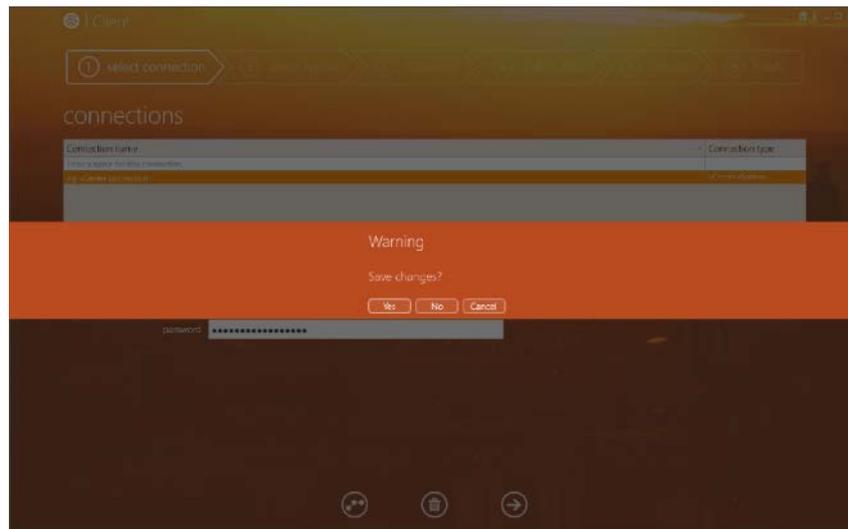
2. Click the **Enter a name for this connection** cell. Type a name for the connection. Select the **Connection type**. Select the **vCenter vSphere** connection type. Press **Enter** to create the connection, then complete the connection details.



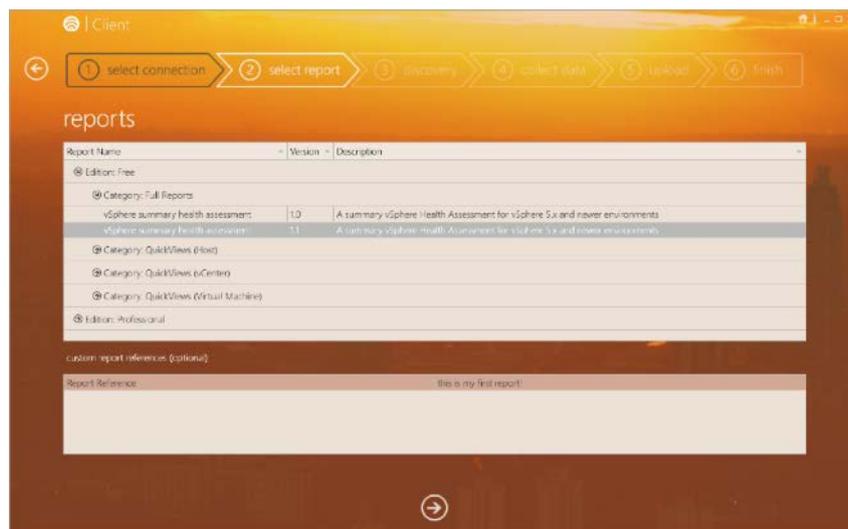
3. Click the next **arrow** at the bottom of the screen.



4. When prompted, click **Yes** to save the connection.



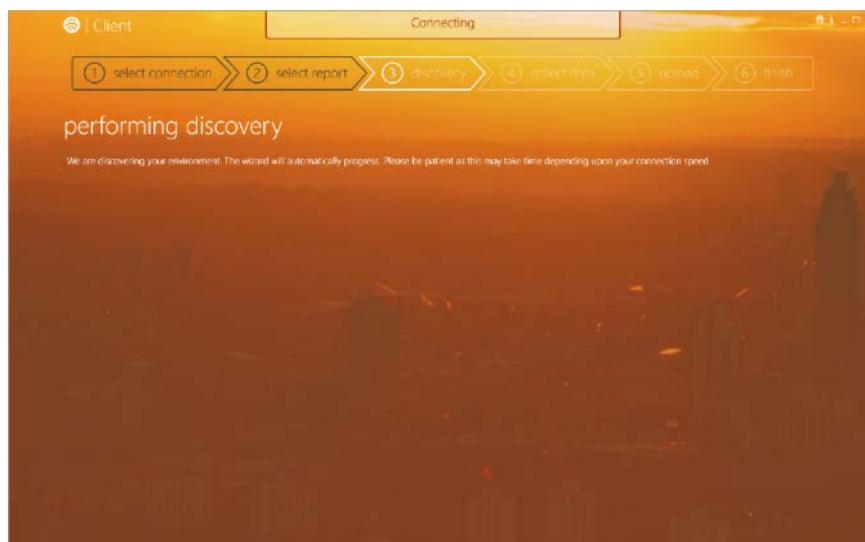
5. Select the report you wish to generate. If you wish to enter a reference for your report you can select a cell in the custom report references and type a brief note. This will appear on the portal in the **Reports** page as a field next to the completed report.



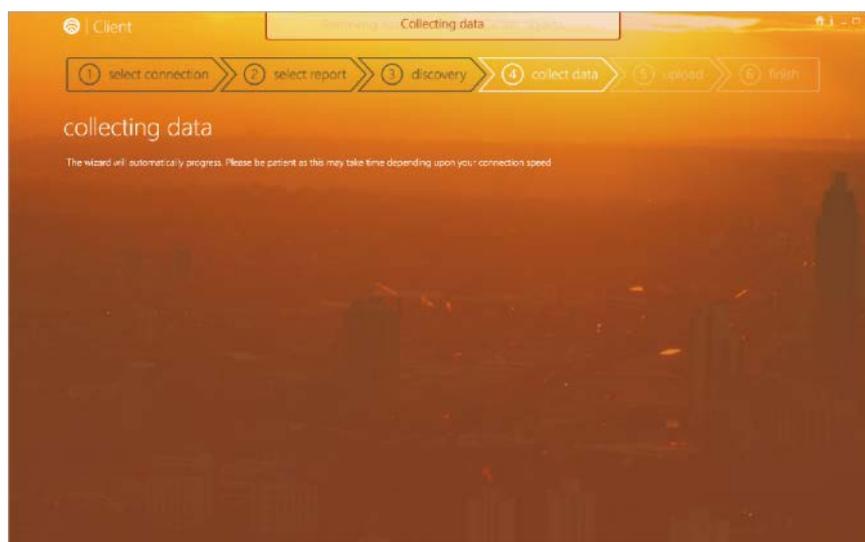
6. Click the next **arrow** at the bottom of the screen.



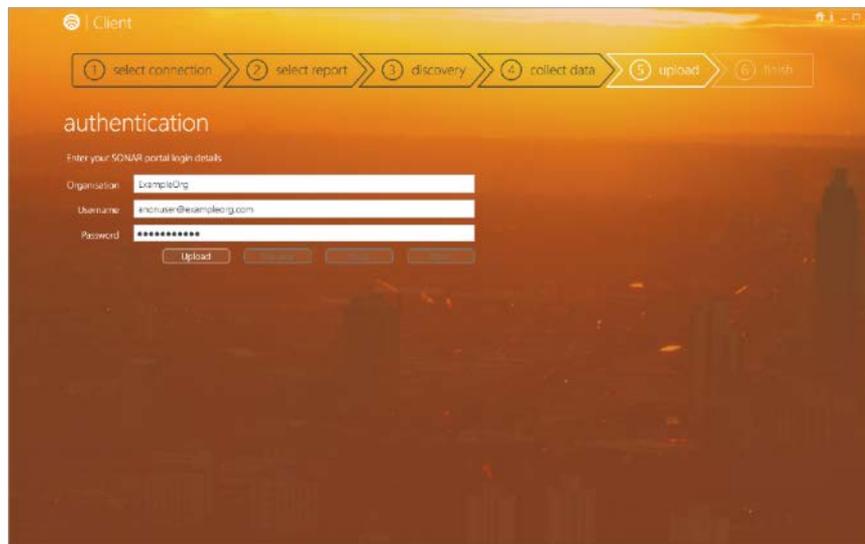
7. An automated discovery of your infrastructure will then begin. Once complete, the wizard will automatically progress.



8. The specific data needed to generate your report will now be collected. When this step is complete the wizard will automatically progress.



9. Enter your SONAR portal credentials to authenticate, to enable the data to be automatically uploaded. Click the **Upload** button. The wizard will automatically progress when the data upload has completed.



10. Once the upload has finished the SONAR portal will automatically generate the report. You can check progress by logging into the portal and download once complete.

