QuickStart Guide for Client Management

Version 8.7

JAMF software

How to Use This Guide

Client management with the Casper Suite is based on eight tasks—Inventory, Imaging, Patch Management, Software Distribution, Remote Control, Settings and Security Management, License Management, and Usage Management. This guide contains a lesson-based workflow for each task.

You can complete one or all of the workflows in any order that meets your client management needs.

After completing a workflow, use the advanced options in the "Explore More" section to further customize your framework.

Keep in mind that you only need to complete each lesson once. If you've already completed a lesson (for example, installing the JSS), skip it and move on to the next one in the workflow.

Using a Print Version of This Guide

1. Locate the task that you want to complete on the Lesson Plan page.

2. Complete each lesson in the workflow.

   You can find additional information about each lesson in the *Casper Suite Administrator's Guide*. A list of relevant sections is provided in the "Administrator's Guide Reference Sections" section of each lesson.

3. After you complete the last lesson in the workflow, refer to the "Explore More" section of this guide for a list of extended options and where to read more about them in the *Casper Suite Administrator's Guide*.

Using a PDF of This Guide

Use the Bookmarks panel to navigate each workflow.

QuickStart Guide for Client Management

Lesson Plan

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Lessons

Install the JAMF Software Server

The JAMF Software Server (JSS) is the administrative core of the Casper Suite. It stores inventory information, allows you to deploy policies, and communicates with the other administrative applications in the Casper Suite to perform client management tasks.

The instructions in this section explain how to install the JSS on Mac OS X Server.

> *Note:* To obtain the JSS Installer for Windows or Linux along with its installation guide, contact your JAMF Software Representative, or visit the following website and log in with a valid JAMF Nation account:
>
> https://jamfnation.jamfsoftware.com/myAssets.html
>
> For instructions on how to manually install the JSS on Linux and Windows, download the "Manually Installing the JAMF Software Server" technical paper from:
>
> http://jamfsoftware.com/libraries/pdf/white_papers/Manually_Installing_the_JAMF_Software_Server.pdf

Installing the JSS on Mac OS X Server requires a Mac computer with:

- A clean installation of OS X Server v10.6 or later
- An Intel processor
- 2 GB of RAM
- 400 MB of disk space available
- Java 1.6
- MySQL Enterprise Edition 5.5 or later (recommended) *or* MySQL Community Server 5.5 or later, available at:
    https://www.mysql.com/downloads/

> *Note:* If you are using OS X Server v10.6, you can use the version of MySQL that is built into the operating system.

- Ports 8443 and 9006 available

Step 1: Create the jamfsoftware Database

Create a MySQL database in which the JSS can store its data and a MySQL user that can access it. Name the database "jamfsoftware" and give the MySQL user the following credentials:

- Username: jamfsoftware
- Password: jamfsw03

> *Note:* If you customize the database name, username, or password, you will be prompted to enter the custom settings on the Database pane when you run the JSS Installer.

To create the jamfsoftware database:

1. Open Terminal and access the MySQL command line as "root" by typing:

```
mysql -u root -p
```

If MySQL is not in the path or it is installed in a custom location, access the MySQL command line by updating the path or by typing:

```
/path/to/mysql -u root -p
```

> *Note:* On OS X v10.7 or later, the default path for MySQL is `/usr/local/mysql/bin/`.

2. Type the password for the MySQL "root" user.

3. Create a database named "jamfsoftware" by executing:

```
CREATE DATABASE jamfsoftware;
```

4. Grant permissions to a MySQL user named "jamfsoftware" so that it can access the new database:

```
GRANT ALL ON jamfsoftware.* TO 'jamfsoftware'@localhost IDENTIFIED BY
    'jamfsw03';
```

> *Note:* If you choose to enter a username other than "jamfsoftware", it is recommended that you do not use "root".

Step 2: Run the JSS Installer

Run the JSS Installer to install Apache Tomcat (the web application server that runs the JSS) and the JSS web application. This also creates your initial distribution point.

To run the JSS Installer:

1. Copy the JSS Installer for Mac to the server.

> *Note:* The JSS Installer for Mac included in the product DMG (`JSS Installer.mpkg`) is unsigned. To obtain a signed version of the JSS Installer for Mac (`JSS Installer.pkg`), contact JAMF Software Support. The signed version allows you to install or upgrade the JSS when Apple's Gatekeeper feature is set to only allow applications downloaded from the Mac App Store and identified developers.

2. Double-click the installer and click **Continue** to proceed.

3. When the Introduction pane appears, click **Continue**.

4. Read the information on the Read Me pane, and then click **Continue**.

5. Select a drive on which to install the software, and then click **Continue**.

6. If you customized the database name, username, or password when you created the jamfsoftware database, or MySQL is using a port other than 3306, the Database pane is displayed. Update the information to reflect your custom settings, and then click **Continue**.

7. Click **Install**.

8. Enter your administrator password when prompted, and then click **OK** or **Install Software**.

9. When the installation is complete, follow the instructions on the Summary pane to access the JSS. Then, click **Close**.

Administrator's Guide Reference Sections

- "Installing the JSS on Mac OS X Server"
- "Setting Up the JSS"

Enroll Computers

Before performing client management tasks with the Casper Suite, you must enroll computers with the JSS.

There are two primary ways to enroll computers:

Use the Network Scanner

If you use SSH (Remote Login) to access remote computers, see the instructions on page 10.

Use a QuickAdd Package

If you want to deploy a QuickAdd package to remote computers using a remote deployment tool, such as Apple Remote Desktop, see the instructions on page 11.

See the "Enrolling Mac OS X Computers with the JSS" section in the *Casper Suite Administrator's Guide* for alternate enrollment methods.

Enroll Computers Using the Network Scanner

Enrolling computers using the network scanner requires:

- Computers with OS X v10.5 or later
- SSH (Remote Login) enabled on the computers
- Recon

To enroll computers using the network scanner:

1. Open the Recon application.
   If prompted, enter the DNS name or IP address for the JSS and click **Save**.

2. Log in using the account that you created when you set up the JSS and click **Connect**.

3. Select **Network Scanner** in the sidebar.

4. Click the **Add (+)** button below the IP ranges list.

5. Enter the beginning and ending IP addresses, and then click **OK**.

6. Click the **Add (+)** button below the SSH accounts list.

7. Enter credentials for an administrator account that has SSH access to the computers, and then click **OK**.
   If more than one administrator account exists on the network, enter credentials for each account. Recon tries each set of credentials until it finds a valid account for each computer.
   The SSH account is used as the management account.

8. Click **Scan.**

   Once you complete these steps, Recon attempts to connect and authenticate to each IP address that has SSH enabled. The results of the scan are displayed on the Inventoried, Not Found, and Problems panes.

Administrator's Guide Reference Sections

"Enrolling Mac OS X Computers with the JSS"

Enroll Computers Using a QuickAdd Package

Enrolling computers using a QuickAdd package requires:

- Computers with OS X v10.5 or later
- A remote deployment tool, such as Apple Remote Desktop
- Recon

To enroll computers using a QuickAdd package:

1. Open the Recon application.

   If prompted, enter the DNS name or IP address for the JSS and click **Save**.

2. Log in using the account that you created when you set up the JSS and click **Connect**.

3. Select **QuickAdd Package** in the sidebar.

4. Specify the account that you want to use for management.

   If this is a new account, select the **Create this account if it does not exist** checkbox and the account will be created for you.

5. Click the **Create** button.

6. Save the package to the desired location.

7. Deploy the package using a remote deployment tool.

Administrator's Guide Reference Sections

"Enrolling Mac OS X Computers with the JSS"

View Computer Details

After enrolling computers, you can view the following information about them:

- Computer Information
- Hardware
- Operating System
- Location
- Purchasing
- Extension Attributes
- Storage
- Peripherals
- Synced Mobile Devices
- Computer Groups
- Licensed Software

- Applications
- Unix Applications
- Fonts
- Plug-ins
- Package Receipts
- Software Updates
- Local User Accounts
- Printers
- Services
- Unix Reports
- Attachments

Viewing computer details requires access to the JSS in a web browser.

To view computer details:

1. Open the JSS in a web browser.

2. Log in using the account that you created when you set up the JSS.

3. Click the **Inventory** tab.

4. Leave the search field blank and click the **Search Computers** button.

5. Click the **Details** link across from any computer record to view details.

Administrator's Guide Reference Sections

"Searching Computers"

Explore More: Inventory

For more information about Inventory functions, see page 26 of this document.

Upload an OS Image or a Package

Before you image computers or deploy a software package, you must upload the OS image or software package to the Casper Admin application and assign it to a category.

For more information on building packages, see the appendix of this document.

Uploading an OS image requires:

- A disk image (DMG) of a Mac OS X version
- Casper Admin

Uploading a package requires:

- A software package
- Casper Admin

To upload an OS image or a package:

1. Open the Casper Admin application.
   If prompted, enter the DNS name or IP address for the JSS and click **Save**.

2. Log in using the account that you created when you set up the JSS.

3. Drag the OS image/package from the Finder window into the list of packages in Casper Admin.
   The name of the OS image/package is displayed in blue text because it is not assigned to a category.

4. Click the **New Category** button.

5. Enter a name for the category (for instance, "Operating Systems"), and then click **OK**.

6. Drag the OS image/package from the list of packages into the new category.
   The category is listed at the top of the pane.

7. Save your changes and quit the application.

Administrator's Guide Reference Sections

"Managing Packages"

Create a Configuration

After you upload an OS image to Casper Admin, create the configuration that you will use to image computers.

Creating a configuration requires Casper Admin.

To create a configuration:

1. Open the Casper Admin application.

   If prompted, enter the DNS name or IP address for the JSS and click **Save**.

2. Log in using the account that you created when you set up the JSS.

3. Click the **New Config** button and enter a name for the configuration.

4. Click the **Management** tab.

5. Select the **Ensure computers imaged with this configuration are enrolled** option, and enter credentials for a local administrator account.

   This ensures that you can perform client management tasks on computers imaged with the configuration.

6. Click **OK**.

   The configuration appears under the **Configurations** heading in the sidebar.

7. Drag the OS image from the list of packages to the configuration that you created in the sidebar.

   If the OS image is not in the list of packages, make sure the **Repository**, **View Type**, and **Categories** lists at the top of the window are set to **All**.

8. Save your changes and quit the application.

Administrator's Guide Reference Sections

"Managing Configurations"

Image a Computer

Image the computers using the configuration that you created.

Imaging a computer requires a FireWire/USB drive, NetBoot image, or Restore partition that contains a copy of Casper Imaging.

To image a computer:

1. Boot a test Mac to the FireWire/USB drive, NetBoot image, or Restore partition.

2. Open the Casper Imaging application.
   If prompted, enter the DNS name or IP address for the JSS and click **Save**.

3. Log in using the account that you created when you set up the JSS.

4. Enter credentials for a local administrator account.

5. Choose the drive you want to image from the **Target Drive** pop-up menu.

6. Select the **Erase <target drive>** checkbox.

7. Enter a name for the computer.

8. Use the **Install Configuration** pop-up menu to choose the configuration that you created.

9. Select the **Reboot to <target drive>** checkbox.

10. Click **Install**.

Administrator's Guide Reference Sections

"Imaging Drives"

Explore More: Imaging

For more information about Imaging functions, see page 27 of this document.

Add a Software Update Server

Specify the server you want to use to run Apple's Software Update.

Adding a software update server requires:
- Access to the JSS in a web browser
- Mac OS X Server running the Software Update service

To add a software update server:

1. Open the JSS in a web browser.

2. Log in using the account that you created when you set up the JSS.

3. Click the **Settings** tab.

4. Click the **Servers** link.

5. Click the **Add Server** button.

6. Select the **Software Update** option, and then click **Continue**.

7. Enter a display name for the software update server.

8. Enter the DNS name or IP address of the server currently running the Software Update service.

9. Click **Save**.

Administrator's Guide Reference Sections

"Adding Software Update Servers"

Create a Policy to Run Software Update

After you add a Software Update Server, create a policy to run Software Update on client computers.

Creating a policy to run Software Update requires access to the JSS in a web browser.

To create a policy to run Software Update:

1. Open the JSS in a web browser.

2. Log in using the account that you created when you set up the JSS.

3. Click the **Management** tab.

4. Click the **Policies** link.

5. Click the **Create Policy** button.

6. Select the **Create policy manually** option, and then click **Continue**.

7. Enter a display name for the policy.

8. Assign the policy to a category by choosing an option from the **Category** pop-up menu.

9. Choose a trigger from the **Triggered By** pop-up menu.

10. Specify how often you want computers to run the policy by choosing an option from the **Execution Frequency** pop-up menu.

11. Click the **Scope** tab and assign computers to the scope.

12. Click the **Packages** tab and select the **Install All Software Updates** checkbox.

13. Click **Save**.

    Computers run the policy the next time they check in with the JSS and meet all of the criteria on the General and Scope panes.

    The default check-in frequency for computers is every 15 minutes.

Administrator's Guide Reference Sections

"Running Software Update"

Explore More: Patch Management

For more information about Patch Management functions, see page 28 of this document.

Create a Policy to Deploy a Package

After uploading the package to Casper Admin and assigning it to a category, create a policy to deploy the package.

Creating a policy to deploy a package requires access to the JSS in a web browser.

To create a policy to install a package:

1. Open the JSS in a web browser.

2. Log in using the account that you created when you set up the JSS.

3. Click the **Management** tab.

4. Click the **Policies** link.

5. Click the **Create Policy** button.

6. Select the **Install or uninstall a package** option, and then click **Continue**.

7. Follow the onscreen instructions to configure the rest of the policy.

   Computers run the policy the next time they check in with the JSS and meet all of the criteria on the General and Scope panes. The default check-in frequency for computers is every 15 minutes.

Administrator's Guide Reference Sections

"Installing Packages"

Explore More: Software Distribution

For more information about Software Distribution functions, see page 29 of this document.

Share the Screen of a Remote Computer

The Casper Remote applications allows you to share the screen of another computer on your network.

Sharing the screen of a remote computer requires:

- SSH to be enabled on the host and client computer
- Casper Remote

To share the screen of a remote computer:

1. Open the Casper Remote application.
   If prompted, enter the DNS name or IP address for the JSS and click **Save**.

2. Log in using the account that you created when you set up the JSS.

3. In the Computers list, select the computer whose screen you want to share. (You do not need to select the checkbox next to the computer name.)

4. Click the **Screen Share** button in the toolbar.

Administrator's Guide Reference Sections

"Using Screen Sharing"

Explore More: Remote Control

For more information about Remote Control functions, see page 30 of this document.

Create a Managed Preference Profile

Before enforcing a Managed Preference on OS X v10.6 computers, you must create a Managed Preference profile. This allows you to define the scope, or group of computers, on which the Managed Preference will be enforced.

Creating a Managed Preference profile requires access to the JSS in a web browser.

To create a Managed Preference profile:

1. Open the JSS in a web browser.

2. Log in using the account that you created when you set up the JSS.

3. Click the **Management** tab.

4. Click the **Managed Preferences** link.

5. Click the **Create Managed Preference Profile** button.

6. Enter a display name for the profile and select the **Yes** option to enable it.

7. Click the **Scope** tab and assign computers to the scope.

8. Click **Save**.

Administrator's Guide Reference Sections

"Managed Preferences"

Create a Managed Preference

After creating a Managed Preference profile, create the managed preference by using one of the Managed Preference templates in the JSS.

The instructions in the section explain how to create a Managed Preference that requires users to enter a password to dismiss their screen saver.

Creating a Managed Preference requires access to the JSS in a web browser.

To create a Managed Preference:

1. Open the JSS in a web browser.

2. Log in using the account that you created when you set up the JSS.

3. Click the **Management** tab.

4. Click the **Managed Preferences** link.

5. Click the **Create Managed Preference** button.

6. Select the **Create from template** option, and then click **Continue**.

7. In the list of domains, locate **com.apple.screensaver** and click the disclosure triangle next to it.

8. Click the **Create** link across from the Require Password preference.

9. Choose "User Level Enforced" from the **Apply Setting To** pop-up menu.

10. Enter a value in the **Value** field.

11. Click the **Profiles** tab and assign the preference to the Managed Preference profile that you created by selecting the checkbox across from it.

12. Click **Save**.

    This managed preference is enforced each time a user logs in to their computer.

Administrator's Guide Reference Sections

"Managed Preferences"

Explore More: Settings and Security Management

For more information about Settings and Security Management functions, see page 31 of this document.

Create a Licensed Software Record

After enrolling computers, you can store and track license information by creating licensed software records.

Creating a licensed software record requires access to the JSS in a web browser

To create a licensed software record:

1. Open the JSS in a web browser.

2. Log in using the account that you created when you set up the JSS.

3. Click the **Settings** tab.

4. Click the **Licensed Software Management** link.

5. Click the **Licensed Software from Template** button.

6. Click the **Create** link across from the software that you want to create a licensed software record for.

7. Click the **Licenses** tab, and then click the **Add License** link to specify information about each license.

8. When you are done, click **Save**.

Administrator's Guide Reference Sections

"Creating Licensed Software Records"

Explore More: License Management

For more information about License Management functions, see page 32 of this document.

Update Inventory Using Casper Remote

After enrolling computers, you can monitor the application usage patterns across your environment.

Before viewing application usage data, make sure that you have the most current inventory information by using Casper Remote to generate updated inventory reports.

To update inventory using Casper Remote:

1. Open the Casper Remote application.

   If prompted, enter the DNS name or IP address for the JSS and click **Save**.

2. Log in using the account that you created when you set up the JSS.

3. In the Computers list, select the checkbox next to each computer that you want to submit an updated inventory report.

4. Click the **Advanced** tab, and then select the **Update Inventory** checkbox.

5. Click **Go**.

Administrator's Guide Reference Sections

- "Configuring the Computer Management Framework"
- "Policies"

View Application Usage Logs

Now that the JSS has up-to-date inventory information, you can access the Application Usage logs for each computer and view the amount of time that each application was used.

Viewing Application Usage logs requires access to the JSS in a web browser.

To view Application Usage logs for an individual computer:

1. Open the JSS in a web browser.

2. Log in using the account that you created when you set up the JSS.

3. Click the **Inventory** tab.

4. Search for a computer that you want to view Application Usage logs for.

5. Click the **Logs** link across from the computer record.

6. Click the **Application Usage Logs** link at the top of the page to see the Application Usage logs for the computer.

Administrator's Guide Reference Sections

"Application Usage"

Explore More: Usage Management

For more information about Usage Management functions, see page 33 of this document.

Explore More

Explore More: Inventory

- "Managing Buildings and Departments" – Explains how to create and use the organizational components that let you group computers according to their physical and departmental placement throughout your organization. Buildings and departments are useful tools for searching and reporting throughout the inventory process.

- "Managing Network Segments" – Explains how to create and use network segments to assign groups of computers to buildings and departments according to IP address.

- "Managing Inventory Preferences" – Explains how to customize the way that your inventory is gathered and displayed.

- "Managing Peripheral Types" – Explains how to include peripherals in your inventory.

- "Enrolling Mac OS X Computers with the JSS" – Explains how to add computers to the JSS for full management with the Casper Suite.

- "Acquiring Mac OS X Computers" – Explains how to add computers to the JSS so that you can search and report on them as part of your inventory.

- "Acquiring Mobile Devices" – Explains how to acquire mobile devices as part of your inventory.

- "Performing Advanced Computer Searches" – Describes your advanced options when searching for computers in the JSS.

- "Viewing Computer Search Results" – Explains the different reporting formats in which you can view inventory search results.

- "Performing Mass Actions on Computer Search Results" – Explains how to perform management tasks on all computers in your inventory search results.

- "Searching Mobile Devices" – Explains how to search for mobile devices in the JSS.

- "Creating Computer Groups" – Explains how to create organizational components based on a computer's inventory attributes.

- "Suppressing Software from Reports" – Explains how to suppress software from inventory reports.

Explore More: Imaging

- "Managing Distribution Points" – Explains how to create and use distribution points.
- "Managing Network Segments" – Explains how to create network segments and use them to assign distribution points and scopes for PreStage Imaging.
- "Managing Printers" – Describes how to add and modify printer attributes in the JSS for imaging purposes.
- "Managing Scripts" – Describes how to add and modify the script attributes in the JSS for imaging purposes.
- "Creating Directory Bindings" – Explains how to create directory bindings for Open Directory, Active Directory, Likewise, ADmitMac, and Centrify in the JSS.
- "Using the Autorun Feature" – Explains how to re-image computers automatically on a fixed schedule.
- "PreStage Imaging" – Explains how to automatically image new computers as you add them to your network.
- "Target Mode Imaging" – Explains how to image a new computer by booting it into Target Disk Mode and connecting it to a host computer via FireWire or Thunderbolt cable.
- "Creating Smart Configurations" – Explains how to create and use smart configurations.
- "Compiling Configurations" – Describes how to compile configurations to speed up the imaging process.

Explore More: Patch Management

- "Managing Network Segments" – Explains how to create network segments and use them as the scope for software update policies.

- "Adding Disk Images of Adobe Updaters" – Explains how to upload a disk image of an Adobe updater to Casper Admin.

- "Installing Adobe CS3/CS4 Updaters" – Explains how to deploy Adobe CS3/CS4 updaters.

- "Self Service" – Provides a complete overview of the Self Service application, which gives users the ability to install Software Update packages.

Explore More: Software Distribution

- "Creating Package Sources" – Explains how to create the package sources used to build packages.

- "Building Packages from Package Sources" – Explains how to build the packages used to deploy software.

- "Managing Distribution Points" – Explains how to create and use the distribution points from which client computers pull software packages.

- "Managing Network Segments" – Explains how to create computer groups based on IP ranges and use them as the scope for policies and to assign distribution points.

- "Adding Disk Images of Adobe Installer DVDs" – Explains how to prepare Adobe CS3 and CS4 products for deployment without repackaging them.

- "Installing Packages" – Explains how to install software on remote computers.

- "Self Service" – Provides a complete overview of the Self Service application, which gives users the ability to install packages.

Explore More: Remote Control

"How Screen Sharing Works" – Explains how Casper Remote connects to remote computers for screen sharing.

Explore More: Settings and Security Management

- "Managing Mac OS X Configuration Profiles" – Explains how to apply groups of settings to computers with OS X v10.7 or later by creating and installing configuration profiles.

- "Managing Printers" – Explains how to add, modify, and remove printers from the JSS.

- "Managing Scripts" – Explains how to add, modify, and remove scripts from the JSS.

- "Creating Directory Bindings" – Explains how to create directory bindings for Open Directory, Active Directory, Likewise, ADmitMac and Centrify in the JSS.

- "Running Scripts" – Explains how to run scripts on remote computers.

- "Managing Printers" – Explains how to add or remove printers from remote computers using a policy or Casper Remote.

- "Managing Dock Items" – Explains how to add or remove Dock items from remote computers.

- "Managing Local Accounts" – Explains how to add and remove local accounts from remote computers and reset account passwords.

- "Binding to Directory Services" – Explains how to bind remote computers to a directory service.

- "Managing Open Firmware/EFI Passwords" – Explains how to set or remove Open Firmware/EFI Passwords from remote computers.

- "Running Remote Commands for Mac OS X Computers" – Explains how to run remote lock, unenroll, and wipe commands for a Mac OS X computer. It also explains how to view the status of and cancel a remote command.

Explore More: License Management

- ■ "Reporting on Licensed Software" – Explains how to track licensed software by generating reports.
- ■ "Reclaiming Unused Licensed Software" – Explains how to locate and remove unused licensed software from remote computers.

Explore More: Usage Management

- "To View Application Usage Logs for Multiple Computers" – Explains how to generate Application Usage logs for computer groups, buildings, and departments.

- "To View Application Usage Logs for Licensed Software" – Explains how to view Application Usage logs based on licensed software.

- "Computer Usage" – Explains how to generate and view logs based on a remote computer's startup, login, and logout actions.

- "Restricted Software" – Explains how to restrict applications from being installed or used on remote computers.

Appendix: Package Software

The Composer application allows you to package software for deployment with the Casper Suite.

Requirements

- The disk image or installer DVD for a piece of software that's not already installed on your computer
- Composer

To create a software package:

1. Open the Composer application.

2. Enter credentials for an account with permissions to make changes to the computer on which you are working.

3. Click the **New** button in the toolbar.

    If the Snapshot option is not already highlighted in the sidebar, select it.

4. Select the **Normal Snapshot** option in the New Package pane, and then click **Choose**.

5. Enter a name for the package and click **Begin**.

6. When Composer is finished taking the initial snapshot, install and configure your software. Then, click the **Create Package Source** button.

    When Composer is finished taking the final snapshot, the package name appears under the Sources heading in the sidebar.

7. Select the package name in the sidebar, and then click the **Build as DMG** button.

8. Save the DMG to your desktop.

Additional References

- "Taking Snapshots"
- "Editing Package Sources"
- "Building Packages from Package Sources"