

Creating and Scoping Group Memberships (Unit Distinct)

Document Number	Effective Date	Review Date	Version	Author	Approved By
[ITEP.1.x]	02/27/2025	02/27/2025	1	Bernardo Garcia-Moreno	[Approver Name]

IT Admin Procedure

1. Purpose

Describe the purpose of the SOP. Explain why this procedure is necessary and what it aims to achieve.

The purpose of this SOP is to outline the procedures for creating and scoping group memberships for IT admins (local support) using Jamf. This document aims to standardize the process for creating smart groups and advanced searches, ensuring that IT admins can effectively manage Apple devices within their specific units or departments.

2. Scope

Define the scope of the SOP. Specify the departments, teams, or processes that this procedure applies to.

This SOP applies to IT admins (local support) who are responsible for creating and scoping group memberships using Jamf. It includes the following groups:

- IT admins (local support)
- Jamf Admins
- Jamf Technicians
- UEM - Apple Team

3. Definitions

Provide definitions for any terms, acronyms, or jargon used in the SOP.

Jamf Pro: Apple Device Management software where Smart Groups, Static Groups, and Advanced searches can be made

Criteria: Specific conditions or attributes used to filter devices, users, or configurations in Jamf, such as device type, OS version, or department. These help refine searches or determine which devices meet certain requirements.

Advanced Searches: A feature in Jamf that allows you to search for devices, users, or computers based on multiple criteria, combining different conditions to create detailed filters for reports, groups, or actions.

Smart Groups: Dynamic groups in Jamf that automatically update based on criteria set by the admin. Devices or users are added or removed from these groups when they meet or no longer meet the specified conditions.

Static Groups: Groups in Jamf where devices or users are manually added or removed by the admin. These groups do not update automatically based on criteria.

Health Check: A custom call that can be accessed within the support hub that will force the computer to check in with the Jamf Server. The Health check runs two commands: Sudo Jamf Recon and Sudo Jamf Policy

Sudo Jamf Recon: This command will force the computer to take inventory within Jamf

Sudo Jamf Policy: This command will force the computer to check for any pending or available policies that are scoped to the computer

4. Responsibilities

Outline the roles and responsibilities of individuals or teams involved in the procedure.

- **IT Administrators (Local Support):** Tasked with creating advanced searches within Jamf, setting criteria based on specific sites or user departments.
- **Jamf Administrators and Jamf Technicians:** Charged with creating and managing smart groups and static groups within Jamf.
- **UEM - Apple Team:** Responsible for assisting and supporting the creation of specific groups and advanced searches as required by departments.

5. Procedure

Detail the step-by-step process to be followed. Include any necessary sub-steps, decision points, and contingencies.

5.1. Preparation

- **Access Requirements:** Ensure that users have the necessary access levels in Jamf. IT admins need at least Jamf Auditor access for advanced searches, while Jamf Admins and Jamf Technicians can create smart groups.

5.2. Execution

Creating Advanced Searches:

- **Criteria:** Set one of the criteria to the specific site or user department that you are looking for.
- **Steps:** Navigate to the "Advanced Searches" section in Jamf, create a new search, and set the necessary criteria based on the site or department.
- **Example:** If you are looking for devices in the "Marketing" department, set the department criteria to "Marketing".

Creating Smart Groups:

- **Criteria:** Similar to advanced searches, set one of the criteria to the specific site or user department.
- **Steps:** Navigate to the "Smart Groups" section in Jamf, create a new smart group, and set the necessary criteria based on the site or department.
- **Example:** If you are creating a smart group for devices in the "Sales" department, set the department criteria to "Sales".

Creating Static Groups:

- **Criteria:** Unlike smart groups, static groups do not update dynamically. Devices or users must be manually added or removed.
- **Steps:** Navigate to the "Static Groups" section in Jamf, create a new static group, and manually add devices or users based on the site or department.
- **Example:** If you are creating a static group for devices in the "IT" department, manually add the relevant devices to the group labeled "IT".

Requesting Assistance:

- **Specific Group Requests:** If you need a specific group created or require assistance, request help from the UEM - Apple Team. By submitting a Ticket in TDx

- **Contact Information:** Provide the necessary details and criteria for the group you need, and the UEM - Apple Team will assist in creating it.

5.3. Troubleshooting

Advanced Searches Not Returning Expected Results

- **Verify Criteria:** Ensure the search criteria are correctly configured and match the expected devices or users.
- **Check Data Sync:** If data seems outdated, refresh the search results or verify that devices have reported back to Jamf.
- **Confirm Scope:** Make sure the search is targeting the correct site or department.

Smart Groups Not Updating Automatically

- **Confirm Criteria Setup:** Double-check that the criteria are correctly defined and reflect the intended scope.
- **Trigger Inventory Update:** Devices may need to check in and update inventory before they appear in the group. Run a manual inventory update if needed. This can be done by running a "Health Check" or running the "Sudo Jamf Recon" Command in Terminal
- **Check for Conflicts:** If a device is not appearing, ensure no conflicting policies or groups override its eligibility.

Static Groups Not Showing All Devices

- **Manual Addition Required:** Unlike smart groups, devices must be manually added. Verify that the correct devices were added.
- **Verify Group Assignment:** Ensure devices are not accidentally removed by another admin.

General Troubleshooting Steps

- **Consult the Apple UEM Team:** If issues persist, the UEM team can check for dependencies or conflicts with other profiles and policies.

5.4. Completion

- **Review:** Ensure that the advanced searches and smart groups are correctly set up and meet the required criteria.
- **Documentation:** Document the created groups and searches, including the criteria used, in the helpdesk ticket system.

5.5. Review and Approval

- **Supervisor Review:** The supervisor should review the created groups and searches to ensure compliance with the SOP.
- **Approval:** The UEM - Apple Team should grant final approval for the created groups and searches.

6. Documentation

List any forms, logs, or records that need to be maintained as part of this procedure.

n/a

7. References

Include any related documents, policies, or regulations that support this SOP.

- Types of groups in Jamf: https://learn.jamf.com/en-US/bundle/jamf-school-documentation/page/Device_Groups.html
- Advanced Searches in Jamf: https://learn.jamf.com/en-US/bundle/jamf-pro-documentation-current/page/Advanced_Computer_Searches.html
- [Access Control Policy and Procedures \(AC-1\)](#)
- [Security Awareness and Training \(AT-2\)](#)
- [Creating and Scoping Group Memberships \(Unit Distinct\) Drawing.vsd](#)

8. Revision History

Track changes made to the SOP over time.

Version	Date	Description of Change	Author
1.0	02/27/2025	Initial release	Bernardo Garcia-Moreno
1.1	[Date]	[Description]	[Author Name]



Appendices

Include any additional information, diagrams, or charts that support the procedure.

- [University Rules and SAPs - Texas A&M University](#)
- [University-Wide IT Governance Framework](#)
- [SOPs – Division of Research - Texas A&M University](#)