



Reporting, Metrics, and Alerts

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Document Number	Effective Date	Review Date	Version	Author	Approved By
[ITEP.1.x]	3/4/2025	[Date]	[Version Number]	Danielle Narita	[Approver Name]

IT Enterprise 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 ensure accurate, consistent, and timely reporting, supporting data-driven decision-making and compliance with university and regulatory requirements.

2. Scope

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

This SOP covers the creation of advanced searches in Jamf Pro, setting up reporting and alerting, and integrating Jamf Pro data with Power BI for deeper analysis. It applies to IT administrators, reporting analysts, and relevant stakeholders who need to access and interpret Jamf Pro data.

3. Definitions

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

- **Jamf Pro:** A comprehensive Apple device management solution that helps IT departments manage and secure Apple devices.
- **Advanced Search:** A feature in Jamf Pro that allows users to create customized queries for specific data or devices based on set criteria.
- **Power BI:** A data analytics tool from Microsoft that allows users to visualize and analyze data, offering insights through dashboards and reports.
- **UEM - Apple Team:** Unified Endpoint Management team responsible for managing Apple devices in the organization.
- **Alert:** A notification generated in Jamf Pro that indicates a specific condition or status requiring attention.



- **Enterprise Reporting:** The process of compiling and distributing reports that provide insights into organizational performance.
- **Performance Metrics:** Quantifiable measures used to evaluate the success of an organization, team, or process.
- **SLA (Service Level Agreement):** A documented agreement outlining service expectations between parties.

4. Responsibilities

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

- **Local Support Users and UEM - Apple Team Members:**
 - Responsible for setting up and managing Advanced Searches in Jamf Pro.
 - Configuring alerts to track significant device management events or changes.
- **UEM - Apple Team Reporting Analyst:**
 - Reviews and creates custom reports in Power BI.
 - Works with UEM - Apple Team and local support to ensure data is accurate and integrated into Power BI for reporting purposes.
 - Ensures the data integrity and accuracy of reports.
- **End-Users:**
 - Use reports and alerts generated by Jamf Pro and Power BI for operational and strategic decision-making, ensuring the effective management of Apple devices.

5. Procedure

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

5.1. Preparation

- **Description:** Local support users will create a ticket in TDx to request help with creating an Advanced Search Report.
- **Responsible Party:** Local Support User
- **Tools/Resources Needed:** TDx

5.2. Execution

- **Description:**
 1. Review and Verify Request



- The UEM - Apple Team verifies that all required information is provided in the request form (e.g., details of the report, metrics, criteria for the advanced search).

2. Create the Report, Dashboard, or Alert

- The UEM - Apple Team proceeds to create the advanced search report or configure alerts as requested in Jamf Pro or Power BI .
- For reports: Use the Advanced Search feature in Jamf Pro to create queries based on the requested criteria.
- For alerts: Set up the appropriate notification triggers within Jamf Pro or Power BI for the specified conditions.

▪ **Responsible Party:** UEM - Apple Team Members

▪ **Tools/Resources Needed:** Jamf Pro

5.3. Troubleshooting

▪ **Description:**

1. Verify Access Permissions

- **Problem:** The requestor or UEM - Apple Team member cannot access the required data or reports.
- **Action:** Ensure that the requestor has the correct permissions to access the relevant devices or data within Jamf Pro and Power BI.
- **Resolution:** Check the user's role in Jamf Pro and Power BI. If necessary, adjust permissions or escalate the issue to the security team to grant access.

2. Confirm Data Availability

- **Problem:** The requested data does not exist or is incomplete.
- **Action:** Double-check the search criteria in Jamf Pro to ensure that the appropriate data is being pulled for the report.
- **Resolution:** Modify the advanced search query to ensure that it matches the required parameters. Verify if the data exists and if the devices or systems are properly enrolled in Jamf Pro.

3. Test Alerts and Notifications

- **Problem:** Alerts or notifications are not triggering or are not being received.
- **Action:** Test the alert configuration in Jamf Pro or Power BI to ensure that the correct triggers and conditions are set.
- **Resolution:** Ensure the alert conditions match the expected scenario (e.g., device enrollment, updates, compliance status). Check if the notification settings are properly configured in Jamf Pro and/or Power BI.

4. Investigate Report Generation Issues

- **Problem:** The generated report contains incorrect or incomplete data.



- Action: Review the parameters of the advanced search query to confirm it is pulling the right information.
- Resolution: Adjust search filters, validate that devices or data points are properly enrolled in Jamf Pro, and confirm that all required fields are included in the report.
- **Responsible Party:** UEM - Apple Team Members
- **Tools/Resources Needed:** Jamf Pro, Power BI

5.4. Completion

- **Description:** The UEM - Apple Team member will send confirmation to requestor that the account is created
- **Responsible Party:** UEM - Apple Team Members
- **Tools/Resources Needed:** TDx

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.

- <https://it.tamu.edu/policy/it-policy/controls-catalog/controls/AC/AC-2/>
- <https://it.tamu.edu/policy/it-policy/controls-catalog/controls/AC/AC-3/>
- <https://it.tamu.edu/policy/it-policy/controls-catalog/controls/AC/AC-6/>
- <https://it.tamu.edu/policy/it-policy/controls-catalog/controls/AU/AU-2/>
- <https://it.tamu.edu/policy/it-policy/controls-catalog/controls/CM/CM-5/>
- Process Diagram - [ITEP Reporting, Metrics, and Alerts.vsd](#)
- [Jamf Pro Advanced Search Best Practices](#)

8. Revision History

Track changes made to the SOP over time.

Version	Date	Description of Change	Author
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1.0	2/27/25	Initial release	Danielle Narita
1.1	[Date]	[Description]	[Author Name]

Appendices

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

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