Preparing for (re)Enrollment

Give me six hours to chop down a tree and I will spend the first four sharpening the axe.

(Abraham Lincoln)
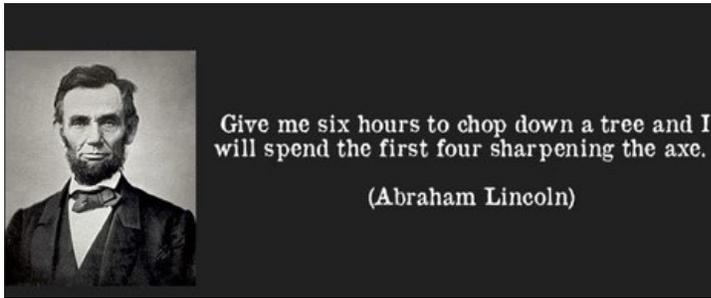
As with all projects, preparing well for your device refresh project before the project start is THE key to success. Hoping the project will go well without proper preparation is simply a recipe for failure, and none of us want that! So, here are some things to consider before you start, and how FileWave capabilities can help:

Device Reclamation

- Step one of a refresh is usually about retrieving devices that are already in the field. Are you needing to do that? If so, you'll want to consider:
    - Is it important to know from whom or from where the device came? Let's look at an example:

        Brian is running a project to retrieve and reassign all iPads in his district. 2/3 of the devices will simply be retrieved, wiped, updated, and (re)Enrolled with new users. However, 1/3 of his devices were on a 2 year lease, which is now at an end. Those devices need to be retrieved and returned to the lease company.

        Brian is going to do an on-site student return of devices in three locations, with a technician receiving devices at each. Now, Brian could instruct his team to record the serial number or asset tag from each device, and compare it to the spreadsheet of leased devices, thus determining whether it goes into the "return" or "re-assign" pile. But, that would be cumbersome, slow, and error prone.

        FileWave tools to the rescue! Because the serial numbers to return are known, a custom field called "Return?" can be created weeks before devices are returned, and that field can be populated by a simple import from the spreadsheet. With that data, custom wallpapers can be assigned to devices ahead of return (like a yellow lock screen background), that allow the technician to simply look at the lock screen, and immediately know which pile the device goes into!

    - Or maybe we simply want to track who returned a device and who did not?

        Emily is running a summertime project to replace all of the Windows devices in the Finance department. "Department" is assigned as a custom field within FileWave, so Emily uses that list of devices as her guideline, and she has decided to use a custom field to track device return. It is a simple true/false field. And, as each device is returned, Emily will simply change the custom field from False to True. Using FileWave Anywhere and looking each device up quickly by asset tag will be a great way for her technicians to get the job done quickly (and to report status).

- There are a lot of different scenarios regarding device retrieval, but the key thing to keep in mind is that your FileWave tools can be used to make this process much more simple, so keep them in mind as you make your plans.

Content:

If devices are coming into the environment, you are going to want to put "stuff" on them. And that stuff is software, configurations, and utilities...aka filesets. So two questions to ask yourself about content:

- Do I have the content built that I need to deploy?
    - VPP Apps are pretty easy, but do I have licenses already? (Day-of-enrollment license procurement is a BAD IDEA...work ahead here as much as you can)
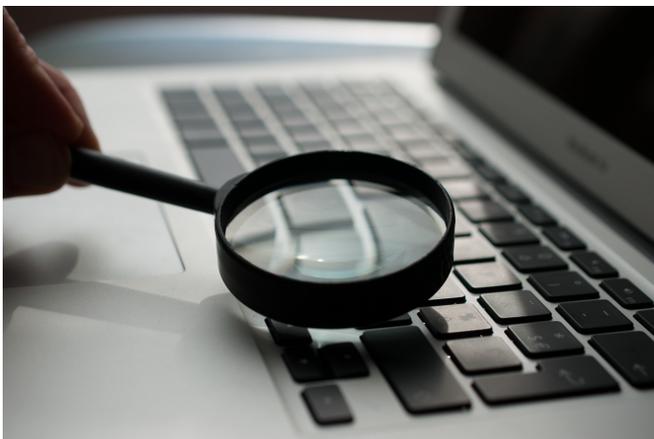
    - If I have more complex filesets, are they built and tested?

- For software, make sure to build filesets ahead of time and thoroughly test everything is working
- For restrictions, are they new? Do you know how they will actually behave in production?
- Do I have an appropriate structure built (i.e. groups and smart groups) to appropriate assign my content? Examples:
  - If I am assigning a restriction profile to student devices, do I have a way to delineate student devices from staff?
    - Groups, smart groups and LDAP groups are all great options here!
  - If I am assigning content to a geographic location (such as an office address or a particular school), have I established that in FileWave?
    - Custom fields may be a great way to do this if you don't have a hook into a directory to rely upon

Pre-Assigning Content:

Did you know you can pre-assign content for FileWave managed devices, even BEFORE they are enrolled in your system? You can...devices can match based on serial number, mac address, and even just the device name. This means you can setup everything we have mentioned above in a simple csv import, and have everything ready to go before anyone yells "start your engines"!

What does this mean practically? It means you don't even necessarily need to touch a device before it is assigned to your users...you can let them do the unboxing, and we'll take care of the rest.

Documentation/Process:

Want success? Write down your plan, share with your colleagues. Everything you don't document will be a question asked of you on D-Day. So, for your own sanity plan and document items such as:

- Physical deployment: How am I going to give devices to people?
  - Drop ship individually?
  - 200 students in a gymnasium at a time?
- Consider infrastructure: Can my wi-fi handle 100 concurrent devices in that room?
- How am I going to record to whom I gave any particular asset?
- Acceptable Use Policy (often overlooked)...do you have one?

In general, just think it through before you start. This isn't rocket science, but if you don't plan, you'll feel like it is!

Revision #14
★Created 13 July 2023 14:05:59 by Josh Levitsky
✎Updated 26 July 2023 13:41:29 by Tony Keller