



Techstep

Essentials MDM

Policy Overview

Date: 01/03/2023



To start policy configuration go to **Advanced** → **Settings** → **Policies** tab. Possible main actions (buttons on the top of the list) are:

1. **Add policy template** – allows administrator to create a new policy template.
2. **Refresh policies on devices** – enables administrator to apply or a policy on a number of devices.
3. **Policies status** – gives an overview of devices assigned to each policy, compliant devices, devices with an outdated policy and devices on which the policy has not yet been implemented.

Default policy

Policy template name	Created on	Last modified on
Default policy	2021-09-10 13:37:23	2023-03-01 15:48:40

Policy template name Search Clear






Policy template name	Priority	Assigned user groups	Assigned device groups	Created on	Last modified on
Oskar Documentation	↓	Oskar Documentation	Oskar_Documentation	2023-03-03 13:43:58	2023-03-03 14:31:19
[redacted]	↑ ↓	[redacted]	[redacted]	2022-09-07 10:29:06	2022-09-07 14:13:35
TS Kiosk mode	↑ ↓		Kiosk Devices	2021-09-13 08:47:28	2021-11-05 12:54:44
Apple_KioskDevice	↑ ↓	[redacted]	Apple_FunctionDevice	2022-01-06 19:45:11	2022-03-16 09:06:25
[redacted]	↑ ↓	[redacted]	[redacted]	2022-02-22 14:09:25	2022-02-22 16:01:50
[redacted]	↑ ↓	[redacted]	[redacted]	2021-11-03 14:04:06	2023-03-01 12:19:37
RetailDemo	↑ ↓		RetailX, Techstep Test	2022-01-14 12:26:17	2023-03-01 12:20:46
[redacted]	↑ ↓	[redacted]	[redacted]	2022-02-08 14:11:05	2022-02-08 14:20:54
[redacted]	↑	[redacted]	[redacted]	2022-03-23 10:30:38	2022-03-23 10:42:29

NOTE: Default policy is now on top of the list and groups can't be assigned to it. Policy is applied to devices that are not assigned to any other policy.

Policy templates list columns description:

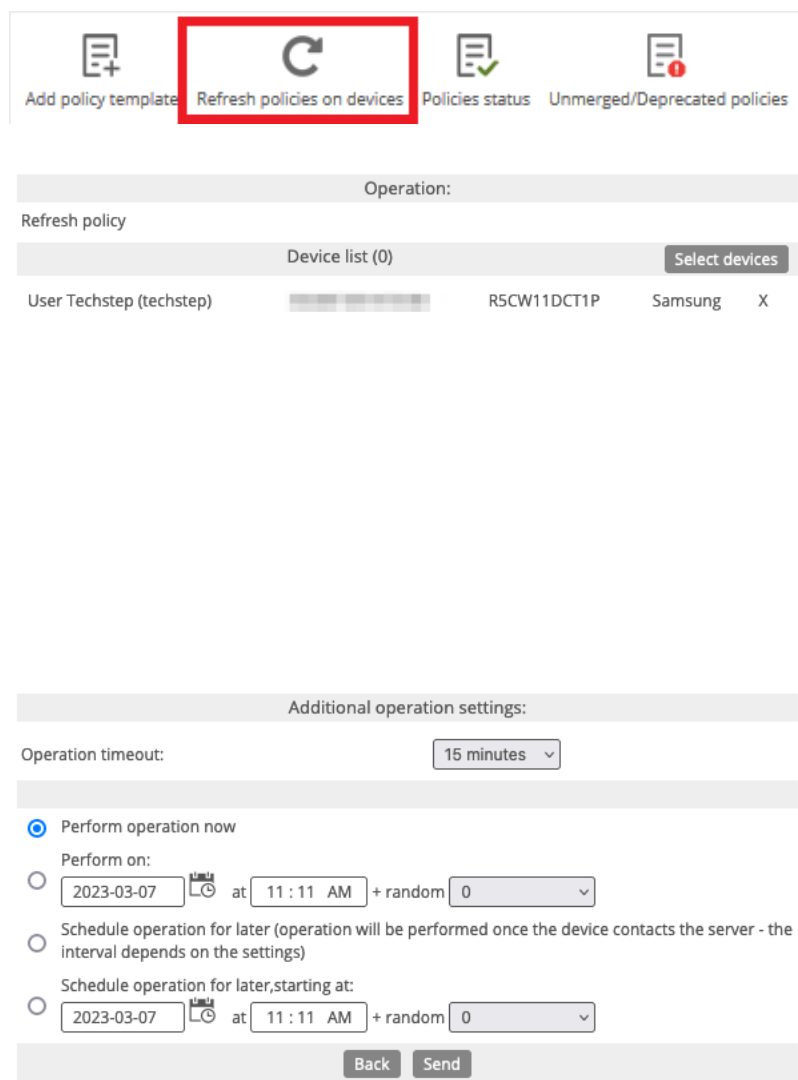
1. **Policy template name** – name of the policy template (clicking on the policy name, opens policy edit page)

2. **Priority** – order of the policy template selection for devices (if user is not assigned to any of the groups used in existing policy templates – last policy template will be applied for user’s devices, if user is assigned to one of the groups used in existing policy templates – the highest policy template will be applied for user’s devices). Clicking on the green arrows changes order.
3. **Assigned user groups** – user groups assigned to policy template
4. **Assigned device groups** – device groups assigned to policy template
5. **Created on** – date of the policy template creation
6. **Action column** – described in detail in the table below

Operation	Icon	Description
Preview		Shows the policy template details (without possibility to edit)
Show policy status		Opens popup with overview of devices assigned to policy, compliant devices, devices with an outdated policy and devices on which the policy has not yet been implemented
Edit		Opens edit form
Save as		Save existing policy as a new one
Delete		Adds possibility to delete policy template (only if policy template is not applied currently on any of the devices). If such policy template is applied currently – alert message will be shown (“Policy template is already applied on devices and cannot be deleted.”)

Refresh Policies on Devices

Clicking on the **Refresh policies on devices** button, directs to operation page. Devices list is filled automatically with all devices that need to have the policy applied (devices with outdated policies and on which policies are not applied, but have agents installed).



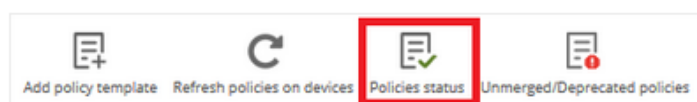
The screenshot shows the Techstep Essentials MDM interface. At the top, there are four buttons: 'Add policy template', 'Refresh policies on devices' (highlighted with a red box), 'Policies status', and 'Unmerged/Deprecated policies'. Below these buttons is a section titled 'Operation:' with a 'Refresh policy' button. Underneath is a 'Device list (0)' section with a 'Select devices' button. The device list contains one entry: 'User Techstep (techstep)' with a progress bar, 'R5CW11DCT1P', 'Samsung', and 'X'. Below the device list is a section titled 'Additional operation settings:'. It includes an 'Operation timeout:' dropdown set to '15 minutes'. There are three radio button options: 'Perform operation now' (selected), 'Perform on:' (with a date/time picker set to '2023-03-07' at '11:11 AM' and a 'random' interval of '0'), and 'Schedule operation for later (operation will be performed once the device contacts the server - the interval depends on the settings)'. At the bottom of the settings section are 'Back' and 'Send' buttons.

You can decide if you wish to perform operation now or schedule it for later. To confirm your choice click **Send**.

Policies Status Popup

On clicking the **Policies status** button, popup with all policies status appears. The popup displays an overview of devices assigned to each policy, compliant devices, devices with an outdated policy and devices on which the policy has not yet been implemented.

Clicking on the preview icon, displays a list of devices.



The device list shows the following parameters:

1. **User** – user of the device
2. **IMEI, Device UID, Serial number** – identifier of the device
3. **Model** – model of the device
4. **Last status date** – date when the policy was successfully applied

5. **Current status icon**

6. **Action column** – with possibility to refresh policy on selected device (by clicking on



).

There is a possibility to refresh policy on all devices with outdated policy and on which policy is not applied yet (**Refresh policy** button on the bottom of the popup).

Policy status is described as follows:

- If the device has no policy template applied – it's text color is gray and the status icon is
- If the policy template was failed on the device – it's text color is red and the status icon is
- If the device has outdated policy template (policy template has been changed after the policy was applied on the device) – it's text color is orange and the status icon is
- If the device is compliant to the policy – it's text color is green and the status icon is