

Getting Started: Apple Configurator



Table of Contents

System Requirements – Pg. 3
About Apple Configurator Preferences – Pg.4
About the Prepare (<i>Settings</i> Tab) – Pg.6-7
About the Prepare (<i>Apps</i> Tab) – Pg.8
About the Prepare (Setup Tab) – Pg.9
How to Prepare an iPad (Unsupervised) – Pg.10-11
How to Prepare an iPad (Supervised)– Pg.13-14
Managing Supervised iPads – Pg.15-16
Assigning iPads to Users – Pg. 17
Other Resources – Pg. 18

System Requirements:

Apps:

Apple Configurator (version 1.4.2): Available in the Apple App Store for FREE. This App allows you to manage all your iPads via USB. Allows you to Prepare, Supervise, and Assign iPads. Profiles are created and then downloaded to each device.

Minimum requirements:

- OS X 10.8 (Mountain Lion) or later
- iTunes 11.1 or later

Recommended Equipment (Optional):

- **Bretford PowerSync iPad Cart** (holds 30 iPads)
- **Bretford PowerSync Tray** (holds 10 iPads)

*NOTE – For best results, you may want to use a product such as a Bretford PowerSync iPad Cart or a Bretford PowerSync Tray (holds 10 iPads). This type of equipment allows you to simultaneously prepare multiple iPads with Apple Configurator. The more iPads you can prepare at once the better. It will save you a ton of time. Some have been successful using USB Hubs instead. However, if you're going to be deploying multiple iPads on a consistent basis, it may be more beneficial to try and purchase the more expensive solutions such as the Bretford products mentioned in this document or something similar.

See the links below for more information

Bretford PowerSync iPad Cart

<http://apple.bretford.com/products/powersynccartforipad>

Bretford PowerSync Tray

<http://apple.bretford.com/products/powersynctrayforipad>

About Apple Configurator Preferences:

To find the Apple Configurator preferences, do the following:

1. Open Apple Configurator
2. In the top file menu, click Apple Configurator and choose "Preferences"

Below are some of the preferences you will see:

General Options:

- Automatically refresh – when you plug in a device it will automatically "refresh" all profile settings for all supervised devices. Basically, if you made any changes to an already existing profile, apple configurator will automatically refresh the iPad that is connected via USB and update its profile settings.
- "Remove Apps and Profiles Configurator did not install" – Apple Configurator will delete any profile previously installed from any other MDM if it was not specifically from your Apple Configurator. Normally you will not have to worry about this option.
- Play Sound on completion – This can be a nice option to choose especially when your multitasking and not able to look at the Apple Configuration screen the entire time.

Lock Screen Options – (Only for supervised devices)

- "Text" – choose between none, device or username, and custom. Choosing "Device or user name" is a good choice. This will display the name that you specify in the "Prepare" section of Apple Configurator
- The "Include User image" only applies if you are going to "Assign" the iPad to one specific user under the "Assign" section within Apple Configurator. Within "Assign" you click the plus (+) to add a new user and then drag a user picture to the user selected.
- Background – If you want to change the background/wallpaper, choose the iPad Button and then drag an image to the window. Make sure the size of the image is 1024 x 1024 pixels or 14.22w x 14.22h



Prepare Devices

Prep your iOS devices for mass deployment.

About the Prepare (*Settings* Tab):

- Name – This is where you can name and number all the iPads. Example; Student iPad 01
- “Number sequentially starting at...” – this option will allow you to name your iPads sequentially if you are preparing several at a time. Example; If you name the first iPad Student iPad 1, the next iPad being prepared will become Student iPad 2 and so on.
- Supervision:
 - o ON – will “bind” the iPad to this Apple Configurator ONLY! Supervised iPads cannot be synced to any other computer, itunes or Apple Configurator. Basically, if the user try’s to sync a supervised device to their own computer it will not work.
 - o OFF – the iPad will not be supervised and the user will be able to sync their iPad with their own computer, itunes, or Apple Configurator. This may be a good option for a Teacher iPad so that the iPad can be synced with their computer/iTunes so they can have the rights to install customized apps instead of being restricted like the supervised iPads.
- Organizational Info button – The name you put here will be noticed on supervised iPad’s within settings/general/about. This is a good way to tell whom the profile on the iPad belongs to. Plus, if you see the name displayed you know it is a supervised device.
 - o “Allow Devices to connect to other Macs” – this allows a supervised device to sync photos and videos with other mac’s
- Update iOS – You can decide to update the iOS, never update, or only when the iPad is in recovery mode.
- Restore – can create backups for all iPads in case you ever need to restore them
- Profiles – Profiles is probably one of the most important settings you can do. Listed below are the different “Payloads” that you can customize within a profile. (**Bold** items below are the most popular Payloads)
 - **General** – Fill out the name, organization, description, consent message and security. Under security I would set the option “with authorization” so you can password protect the profile being created. Then Students can delete the profile.

- Passcode
- **Restrictions** – This is one of the most important Payloads. There is an overwhelming amount of options in here that you can choose to allow or not allow. Go thru this section very slowly because it will affect the user the most.
- Global Proxy
- Web Content Filter
- **Wi-fi** - have iPads automatically join a specific access point. Make sure you spell your Wi-Fi network exactly the way it should be. It is case sensitive.
- VPN
- **AirPlay** – iPads can auto join an airplay device such as apple TV
- Mail
- Exchange Active Sync
- LDAP
- Calendar
- Contacts
- Subscribed Calenders
- **Web Clips** – These are basically website bookmarks that look like app icons on your home screen. Once the user opens this, it will take them straight to the website specified in the web clips settings.
- Font
- Certificates
- SCEP
- APN

About the Prepare (*Apps* Tab)

- This is where you can add apps. However, you only want to add apps to the prepare section if you know that all the iPads you are preparing will need the same apps no matter who uses them. For example, if you are preparing 30 student iPads and you need the Accelerated Reader app and iBooks app on all the iPads, then put those 2 apps here.
- Click the plus "+" at the bottom to add apps. A pop up window will be displayed and then you can choose the location of the app you would like to add. In order to add an app you must download it within iTunes first so then it can import into Apple Configurator. The default location for each app file can be found within the "Mobile Applications" folder which can be found at the following:
Users/"username"/music/itunes/itunes media/mobile applications (username would be the name of the local user account on the mac that your using)
- If you would like to add any paid apps, you still need to do the same as the previous step above but the only difference is that Apple Configurator will automatically notice that this is a paid app and will then prompt you to import the Excel VPP codes spreadsheet. VPP is Apple's Volume Purchase Program. You need to have a VPP account in order to receive codes for the iPads. These codes allow you to install multiple copies of an app on several iPads.
- Here is the link to Apples Volume Purchase Program for Education. <http://www.apple.com/education/it/vpp/> This site will allow you to enroll, login, and download the VPP Guide.

About the Prepare (Setup Tab)

- The "SKIP" section: These options will help skip most of the iPads initial setup/registration screens. Such as Location Services, Restore, Apple ID, Terms and Conditions, Passcode, Siri, and Diagnostics. This will save you tons of time because you will not have to touch-swipe each iPad 8 times each. However, after checking all these options, this still leaves the user having to choose their language, and country.
- The "Settings" section: You will only see this if supervision is OFF. When supervision is off and you are only wanting to "prepare" a device then you get the following Payloads to configure:
 - o Wi-Fi – click this if you want to prepare all iPads with the same Wi-Fi. You can specify the SSID (wireless network name) and password and then all the iPads will connect to the same access point right after they are prepared. The SSID is case sensitive.
 - o Certificates – Usually you do not need to configure this option if you are only "preparing" a device in apple configurator. If you are going to later enroll your iPads with another MDM solution like Profile Manager within OSX server. Once enrolled, the iPads will then receive a certificate that is needed to remotely send profiles to your iPads. If you are just using Apple configurator you will normally not need any special certificate at this time.

How to Prepare an iPad (Unsupervised)

*Note 1 - The example below assumes that you have a Bretford PowerSync iPad Cart/Tray or something similar as described in the system requirements section of this document. Even though this equipment is optional, you can still perform these steps with just one of the normal usb connection cables that comes standard with your iPad. You will just need to repeat the following steps on each iPad. Also, this example assumes that you have already downloaded and installed Apple Configurator to your computer from the App Store.

*Note 2 – The Apple Configurator Preferences (General & Lock Screen Options) do not apply to iPads that are being prepared with Supervision Off. However, the one preference “play sound on completion” within the General options will still work.

1. Remove iPads from box and unwrap
2. Turn on the iPads (You do not have to swipe through the setup screens to continue)
3. Connect all iPads to their usb adapters within your Bretford PowerSync iPad Cart/Tray or similar USB device and place them in the their holders (if no cart/tray or hub, skip this step)
4. Turn on the Bretford PowerSync iPad Cart or Tray – if applicable, check lights on back of cart/tray to make sure all iPad connections are secure (if no cart/tray, skip this step)
5. Now connect the main Usb from the cart/tray into the usb port of your computer that is running Apple Configurator (if no cart/tray, NOW connect your 1 iPad to your computer)
6. Open Apple Configurator
7. Under Prepare, click the SETTINGS TAB
8. Enter a Name for the iPads and a number. (Example; Student iPad 1)
9. Check the box “Number sequentially starting at 1” – this will automatically name all the iPads sequentially.
10. Click the Organization Info button
11. Fill out Name, Phone, Email, and Address info – The name will be displayed on all iPads within settings/general/profiles
12. Uncheck “Allow devices to connect to other Macs – this allows supervised devices to sync photos and video on other macs
13. Choose “don’t restore backup” – we are preparing for the first time so there is not a backup to restore
14. Profiles: You do not have to install a profile because you are

only preparing the iPad at this time. You are not supervising this iPad so there is no need.

15. Click the APP tab (*NOTE - This step is only if you know for sure that all the iPads you are preparing will need the same apps. This just starts all your iPad users off with these apps. However, we are not supervising and only preparing the iPads so the user will be able to add any apps on their own later)
16. Click the plus "+" at the bottom of the window
17. In the Finder window choose the App(s) file(s) that you want to import into Apple Configurator. You can import more than one at a time. (More details in the "About the Prepare (App Tab)" section of this document)
18. Click Select
19. If you are installing a free app, enter your apple ID. If it's a paid app, enter your Apple VPP account information. (More details in the "About the Prepare (App Tab)" section of this document Pg.
20. After your Apps are imported, check mark each App you would like installed.
21. Click the SETUP TAB
22. Check all skip options: Location Services, Restore, Apple ID, Terms and Conditions
23. **Steps 24 -26 are only necessary if you know exactly where the iPads are going to be deployed.** Example, if the iPads you are setting up are only going to be used in a specific classroom and are going to be accessing the same Wi-Fi at all times.
24. Under "settings" double click Wi-Fi or click the configure settings button
25. Highlight Wi-Fi and click configure
26. Enter your SSID, auto join, security type, and password (the name of your wireless network, this is case sensitive)
27. Click save
28. Click the Prepare button at the bottom of the window to start the prepare process. (Time will vary depending on the number of iPads you are trying to Prepare)



Supervise Devices

Enforce a standard configuration on your iOS devices.

How to Prepare an iPad (Supervised)

*Note – The Apple Configurator Preferences (General & Lock Screen Options) will now apply to iPads that are being prepared with Supervision ON.

1. Remove iPads from box and unwrap
2. Turn on the iPads (You do not have to swipe through the setup screens to continue)
3. Connect all iPads to their usb adapters within your Bretford PowerSync iPad Cart or Tray and place them in the their holders (if no cart/tray, skip this step)
4. Turn on the Bretford PowerSync iPad Cart/Tray or similar USB device – if applicable, check lights on back of cart/tray to make sure all iPad connections are secure (if no cart/tray, skip this step)
5. Now connect the main Usb from the cart/tray or similar USB device into the usb port of your computer that is running Apple Configurator (if no cart/tray, connect your 1 iPad to your computer)
6. Open Apple Configurator
7. In the File menu, click apple configurator and choose “Preferences”
8. Choose the Lock Screen icon
9. Choose “Device or Username” from the radio button options – this will display the iPad name on the lock screen which helps when you need to find a specific iPad device
10. Choose the iPad tab next to the background image - You can leave the default background image or drag a pic to this window to change. Make sure the size is (1024 x 1024 pixels)
11. Close Preferences
12. Under Prepare, click the SETTINGS TAB
13. Enter a Name for the iPads and a number. (Example; Student iPad 1)
14. Check the box “Number sequentially starting at 1” – this will automatically name all the iPads sequentially.
15. Click the Organization Info button
16. Fill out Name, Phone, Email, and Address info – The name will be displayed within the iPads profiles. If you would like to check this go to settings/general/profiles
17. Uncheck “Allow devices to connect to other Macs – this allows supervised devices to sync photos and video on other macs
18. Choose “don’t restore backup” – we are preparing for the first

- time so there is not a backup to restore just yet
19. Profiles: You only need to create a profile during the prepare process if you want all iPads to share the same profile initially. Meaning, if you do not need to separate your iPads into groups first after they are supervised, then create a profile now.
 20. How to create a profile – Click the “+” plus and then choose “create new profile”
 21. Click the APP tab (*NOTE - This step is only if you know for sure that all the iPads you are preparing will need the same apps. If you have different groups of iPads that need different apps then
 22. Click the plus “+” at the bottom of the window
 23. In the Finder window choose the App(s) file(s) that you want to import into Apple Configurator. You can import more than one at a time. (More details in the “About the Prepare (App Tab)” section of this document
 24. Click Select
 25. If you are installing a free app, enter your apple ID. If it’s a paid app, enter your Apple VPP account information. (More details in the “About the Prepare (App Tab)” section of this document
 26. After your Apps are imported, check each App you would like installed.
 27. Click the SETUP TAB
 28. Check all skip options: Location Services, Restore, Apple ID, Terms and Conditions, Passcode, Siri, Diagnostics
- Click the Prepare button at the bottom of the window to start the prepare process. (Time will vary depending on the number of iPads you are trying to Prepare)

Managing Supervised iPads

Once all your iPads are prepared with supervision ON, you are ready to manage them within the Supervise section of Apple Configurator. Within the supervise section, the options look similar to the prepare section except that you can now organize your iPads in Groups. Then once you have groups created you can then create a different and unique profile for each of your groups. For example, you could group iPads by classroom or room number. Room 1, Room2, Room3, and then create a special unique profile for each room.

*Note – Before attaching any supervised iPads to Apple Configurator please check your Apple Configurator preferences. Within preferences, there is a couple options that can be very important.

- When a supervised device is connected: if you check the box next to “automatically refresh” the iPad will automatically restore the profile originally assigned and also update the profile if any changes were made
- When a supervised device is refreshed: if you check the box next to “Remove apps and profiles Configurator did not install” Apple Configurator will automatically remove all apps and profiles it did not install. This usually only applies to iPads that are going to be enrolled in more then one MDM solution. An example would be preparing an iPad with Apple Configurator but then also enrolling the same iPad within OSX Server (Profile Manager). More detail on this coming soon.

1. Connect your iPads to Apple Configurator
2. Click the plus “+” in the bottom left hand corner to add a group names.
3. Once your groups are created, you can then drag the iPads from under the all devices/usb connected list to the correct group name you just created on the left.
4. Once your iPads are organized within the correct groups, you can then fill out the settings tab and create a profile.
5. Just like prepare section, you can create a naming scheme for each group you have prepared.
6. Next, choose the update iOS options and restore options.
7. *LOCK TO APP – This is a new feature and can be very helpful to teachers. Choosing an app from this drop down box will force the user to stay within the App ONLY. Example, if you have Accelerated Reader installed, you

can lock a student into Accelerated Reader ONLY. They can't even click the menu/home button to exit.

8. Click the Options button next to the Lock to App drop down box. This allows you to enable or disable more options.
9. Profiles – click the plus “+” and choose create new profile. Fill out the necessary payloads you would like. See “about the prepare (settings tab)” Pg.6 of this document. It explains some of the popular payload choices.
10. Apps – The App section allows you to add apps to all your iPads within the same group. See “How to prepare an iPad (supervised)” Pg. 14 of this document.
11. When you are finished click the “Apply” button at the bottom of the page. This will apply the changes to your iPades.

Assigning iPads to Users

Until school sites are able to support one iPad for every student, assigning iPads probably won't be a very popular setup due to the fact that the iPads the students are using do not necessarily belong to just themselves. The students are usually sharing a class set of iPads instead.

If you're preparing supervised devices with the same configuration for all users and you don't need to retrieve users work or back up user data and settings when the devices are returned, you can use supervised devices without assigning them to specific users. When you reconnect devices to the computer with Apple Configurator installed, their specified configuration is reapplied.

Other Resources:

Apple's Official Apple Configurator Help -
<http://help.apple.com/configurator/mac/1.4.1/>

Apple Configurator: Using Volume Purchase Program (VPP Redemption Codes - <http://support.apple.com/kb/ht5188>

Apple's Official Tutorial (Video) on Apple Configurator – This is a little -dated but can still be helpful
<http://www.apple.com/education/tutorials/#introduction-to-apple-configurator>

Apple's Business and Education Help
<http://www.apple.com/support/ipad/business/>

Coming Soon: Using Apple Configurator with Profile Manger (OSX Server). Prepare Devices with Apple Configurator then create and deploy Profiles to all the iPads via Wi-Fi