JumpCloud Onboarding - Migration Strategy and Implementation

Document Purpose
Identify components of existing environments, migration goals and potential roadblocks, and provide a step-by-step migration strategy.

Target Audience: JumpCloud Administrators

Existing Environment

OS	# systems	AD (Y/N)	Notes:
Windows			
OS X			
Linux			

Existing Integrated services:

	Needed Service	Notes:
	G Suite	
	Office 365	
	SSO/SAML	
	LDAP	
	RADIUS	

Migration Goals/Other Notes:

Migration Plan and Checklist

I. Foundation Preparation

- ❏ 1. Agent Deployment for Systems
  - ❏ a. OS X
  - ❏ b. Windows
  - ❏ c. Linux
- ❏ 2. Employee education
- ❏ 3. User Import / Building the Directory
  - ❏ a. Active Directory
  - ❏ b. G Suite
  - ❏ c. Office 365
  - ❏ d. Local OS
  - ❏ e. Automation/Other
- ❏ 4. Groups Preparation

II. Migration Go-live

- ❏ 5. G Suite
- ❏ 6. Applications (SSO/SAML)
- ❏ 7. LDAP
- ❏ 8. RADIUS
- ❏ 9. System Go-live scenarios
  - ❏ a. Existing Local Account Takeover (All OSes)
  - ❏ b. AD to Local Account cutover
  - ❏ c. New Local Accounts (All OSes)

III. Appendix

1. User Education Templates
   a. JumpCloud User Activation
   b. G Suite Migration
   c. SSO App Migration
   d. LDAP Services migration

I. Foundation Preparation

1. Agent Deployment for Systems

End User Impact: None/Low

Prerequisites:

- Root or admin access to the system - local or remote
- Supported OS - http://support.jumpcloud.com/customer/portal/articles/2390451-jumpcloud-agent-compatibility-and-system-impacts
- Internet connectivity and time synchronization - http://support.jumpcloud.com/customer/portal/articles/2390681-jumpcloud-agent-port-requirements

Considerations: Automation vs. manual install depending on current environment size and future expected growth/desired deployment practices. This can/should be done first*. Deploy the agent on any systems that will be managed by JumpCloud.

**With the exception of domain joined systems. Installing the agent on a domain joined system will result in adverse behavior. For AD migrations, skip to step to and return here when ready to go live.*

Implementation Steps

a. **OSX**
   - Manual install: Via JumpCloud Console or manual distribution of jumpcloud-agent.pkg
   - Command line: http://support.jumpcloud.com/customer/portal/articles/2389320-agent-deployment-via-command-line

b. **Windows**
   - Manual install: via JumpCloud Console or manual distribution of JumpCloudInstaller.exe http://support.jumpcloud.com/customer/portal/articles/2403462-jumpcloud-agent-windows-installation-walkthrough
   - Command line: http://support.jumpcloud.com/customer/portal/articles/2389320-agent-deployment-via-command-line

c. **Linux**
    - Command line: curl --silent --show-error --header 'x-connect-key: YOUR_CONNECT_KEY' https://kickstart.jumpcloud.com/Kickstart | sudo bash
    - Automation:
        - http://support.jumpcloud.com/customer/portal/articles/2441147
        - http://support.jumpcloud.com/customer/portal/articles/2443855--linux-installing-the-jumpcloud-agent-using-chef
        - http://support.jumpcloud.com/customer/portal/articles/2443857

2. Employee Education - Part 1 Pre Go-live

End User Impact: None/Informational

Considerations:
- Notify applicable users of an impending email asking for a password reset
- Different user types may require different workflow change instructions
- LDAP/SSO application workflow changes
- Staged communications coinciding with staged rollout

Implementation Steps
- Customize Organization Information if desired. JumpCloud Console > Settings
- Draft notification to applicable users regarding upcoming workflow changes; For examples, see Appendix 1

3. User Import / Building the Directory

End User Impact: None/Low

Prerequisites: Root or admin access to the systems where the users will be imported from

Considerations:
- This step is only for building the directory, not binding users with systems or resources. Binding users will be done under Go Live steps
- Adding/Importing users into JumpCloud will have no effect on existing accounts until the user is bound to the resource; e.g. A System, Directory, Radius, etc...
- Username naming convention - http://support.jumpcloud.com/customer/portal/articles/2390725-naming-convention-for-users

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Implementation Steps

a. **Active Directory**
   - https://support.jumpcloud.com/customer/en/portal/articles/2405671-migrating-users-from-active-directory *Currently CSV export/import can be leveraged to automate AD migrations. The AD Bridge will be available at a later date. Do not convert AD accounts to local accounts until you are ready to Go live and retire your DCs, see note regarding the ForensiT tool

b. **G Suite**
   - http://support.jumpcloud.com/customer/portal/articles/2426953 through Authorizing and Importing
   - Do not bind users or groups to G Suite until you are ready to Go Live

c. **O365**
   - http://support.jumpcloud.com/customer/portal/articles/2425443-getting-started-with-office-365-user-import-provisioning-and-sync steps 1 and 2
   - Do not bind users or groups to Office 365 until you are ready to Go Live

d. **localOS**
   - Manual entry via the console
   - CSV Import http://support.jumpcloud.com/customer/portal/articles/2444698-importing-your-users-into-jumpcloud-load-users-from-csv-file-

e. **Automation/Other**
   - http://support.jumpcloud.com/customer/portal/articles/2444698-importing-your-users-into-jumpcloud-load-users-from-csv-file-
   - https://github.com/TheJumpCloud/JumpCloudAPI#system-users

4. Groups

End User Impact: None

Considerations:

- Resources needed, Systems, Apps, LDAP, RADIUS, etc..
- Group naming convention

Implementation Steps

- Create Groups as needed for a given resource. Groups of Systems or Groups of Users may be created
- Groups are an organizational construct, no access is given to a resource until the group is bound to another object type; RADIUS, Directories, etc..
- https://support.jumpcloud.com/customer/en/portal/articles/2703450-getting-started-groups

II. Go-Live

5. G Suite

End User Impact: Med, user workflow impacted

Prerequisites:

- G Suite Directory Authorized in JumpCloud
- Users exist in the JumpCloud Directory
- Users notified of changes

Considerations: User concerns or questions regarding new workflow

Implementation Steps

- Complete 'Binding JumpCloud Users to G Suite' http://support.jumpcloud.com/customer/portal/articles/2426953
- Users will receive an email to set or reset their JumpCloud password to complete synchronization.
    - *Note:* If the user's current G Suite password meets JumpCloud password complexity requirements and they opt to use that for JumpCloud registration, from their perspective there is no password reset, although they may be logged out of their current Google auth sessions
- Monitor adoption with the user status in the JumpCloud Console. Resend emails as necessary

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6. Applications (SSO/SAML)

End User Impact: Med, user workflow impacted

Considerations:

- Service provider needs

Implementation Steps:

1. Review documentation around activation in JumpCloud and the SP
2. Prep settings and necessary certs
3. Prepare Groups
4. Grant a Group of Users access by editing the group and selecting the desired application on the 'Applications' tab
5. https://support.jumpcloud.com/customer/en/portal/articles/2779896-binding-users-to-resources

7. LDAP

End User Impact: Med, user workflow impacted

Prerequisites:

- Service provider support, documentation or other technical resources
- Users exist in the JumpCloud Directory
- Prepare Groups
- Test users (if desired)

Considerations:

- Service account naming convention
- LDAP application configuration varies by service provider
- Group Naming convention
- Create Linux group (optional)

Implementation Steps

1. Prepare an LDAP Binding service user account - https://support.jumpcloud.com/customer/en/portal/articles/2439911-using-jumpcloud-s-ldap-as-a-service
2. Complete LDAP configuration within the application - Setup for some common services found here: http://support.jumpcloud.com/customer/portal/topics/926832
3. Test connectivity and response (varies by provider)

4. Bind individual users or Groups of Users to LDAP on the Directories tab of their respective object
5. Go-live by enabling LDAP auth in the application configuration (varies by application)

8. RADIUS

End User Impact: Med, user workflow impacted

Prerequisites:

- Users exist in the JumpCloud Directory
- Group(s) of Users created to be granted RADIUS access.

Considerations:

- WAP device with RADIUS support
- Auth Protocol - EAP/TTLS vs PEAP

Implementation Steps

1. Configure a RADIUS Server https://support.jumpcloud.com/customer/en/portal/articles/2406812-configuring-radius-servers-in-jumpcloud
2. Configure a RADIUS compatible service endpoint; WAP, VPN, Router, etc... https://support.jumpcloud.com/customer/en/portal/articles/2406827-configuring-a-wireless-access-point-wap-vpn-or-router-for-jumpcloud-s-radius
3. Meraki specific instructions: https://support.jumpcloud.com/customer/en/portal/articles/2406833
4. Edit the Group of Users and bind it to the RADIUS Server on the Radius tab
5. Configure the client machines if needed https://support.jumpcloud.com/customer/en/portal/articles/2427837-configuring-your-wifi-clients-to-use-jumpcloud-radius

9. System Go-live Scenarios

End User Impact: High, user workflow impacted

Prerequisites:

- JumpCloud Agent is installed (except AD controlled systems)
- System status is green
- Users exist in the JumpCloud directory
- Groups created (if applicable)

- Usernames match between JumpCloud and the local system (for existing account takeover)

Considerations:

- Time of day/Day of week
- Windows Live accounts (Windows only) http://support.jumpcloud.com/customer/portal/articles/2443874

a. Existing Local Account Takeover (All OSes)

Implementation Steps:

1. Bind the user to the system either directly in the User detail or via group membership
2. Allow 60 seconds for the synchronization to complete.
3. Advise users to logout and log back in with their JumpCloud account password

b. AD to Local Account cutover

Implementation Steps:

1. Perform the final step of Converting AD users to local accounts using the ForensiT tool if desired: https://support.jumpcloud.com/customer/en/portal/articles/2405671
2. Validate the local account exists
3. Remove the system from the domain
4. Deploy the agent to the system (Step 1b)
5. Proceed with the steps above for existing local account takeover

c. New Local Accounts (All OSes)

Implementation Steps:

1. Bind the user to the system either directly in the User detail or via group membership
2. Allow 60 seconds for the synchronization to complete.
3. Advise users to login with their JumpCloud account credentials

III. Appendix

1.

a. User Activation

ACTION REQUIRED - JumpCloud System User Activation

Hello User,

Your user account for is about to be migrated to a new, centralized management system that will apply to the following resources:

a. Salesforce
b. Google Apps
c. Your local machine account
d. etc.…

The Plan:
The migration plan will be rolled out in stages to minimize impact and allow you to adjust to the new workflow.

What this means to you:
The main benefit of the move is that one set of credentials will allow access to all of the listed resources. That means a single username and only a single password to manage. This will be your JumpCloud account.

What you need to do:
The first steps will be User Activation. This will not have any affect on the way that you currently login to the resources listed.

- If you receive an email on or around %datetime% with the subject “JumpCloud System User Activation”
- Please follow the link and complete setup of this account
- Continue to log in with the current credentials to all services until you receive further instruction

Note: That’s it! This username and password will be used for the above resources as we confirm the staged migration to each resource above. This password and your personal information will now be managed at https://console.jumpcloud.com

What comes next:

You will receive additional communication for resource migration confirmation regarding when to use this account username and password.

Regards,
Your IT staff

b. G Suite migration

ACTION REQUIRED - Google Apps account migration

Hello User,

Your Google Apps account is ready to be synchronized with your JumpCloud account.

The Plan:
Complete synchronization of Google Apps Accounts with JumpCloud. Your Google account will be managed by JumpCloud after completing these steps.

What this means to you:
A small workflow change. Google will no longer manage your Google Apps password or profile data. Any password changes or profile information should be updated at https://console.jumpcloud.com instead of Google. Any other resources you login to with your Google account will use this account and password going forward.

What you need to do:
Finalize the synchronization between JumpCloud and Google Apps

- You will receive an email on or around %datetime% with the subject “JumpCloud - Google Apps Sync”.
- Please follow the link and reset your account password.

Note: After the password is reset, you will be logged out of any service that uses your Google Apps account for login. Login using this password for any resource that uses your Google Apps account going forward.

What comes next:
You will receive additional communication for resource migration confirmation regarding when to use this account username and password.

Regards,

Your IT staff

c. SSO apps

ACTION REQUIRED - SSO Apps, Salesforce, etc...

Hello User,

We are migrating the following services to JumpCloud to allow for Single Sign On on %datetime%.

- Salesforce
- Dropbox
- Etc..

The Plan:
Integrate the above services with JumpCloud to allow a Single console for access to the listed service providers.

What this means to you:
A moderate workflow change. You will no longer need to login to these service providers individually with separate accounts.

What you need to do:

- After getting confirmation of the migration, to access these applications, login to https://console.jumpcloud.com
- Depending on the application, you may also initiate login from the service provider

Regards,

Your IT staff

d. LDAP Services

ACTION REQUIRED - Accessing LDAP enabled services

Hello User,

We are migrating the following services to JumpCloud to allow logging in with your JumpCloud credentials on %datetime%.

- OpenVPN
- JAMF
- Etc..

The Plan:
Integrate the above services with JumpCloud to allow access with JumpCloud credentials

What this means to you:
A moderate workflow change. You will no longer need to login to these service providers with credentials specific to the service.

What you need to do:

- After getting confirmation of the migration, validate you can access the application by...

Regards,

Your IT staff