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1 About this document

This document explains how to set up Sophos Mobile step by step to manage your devices.
The descriptions apply to the Sophos Mobile product in Sophos Central.
For other versions of this document, see the Sophos Mobile documentation web page.
2 What are the key steps?

To start using Sophos Mobile:

2. Configure personal settings, technical support contact details, and settings for the Self Service Portal.
3. Upload an Apple Push Notification service certificate to manage iPhones, iPads, and Macs.
4. Optional: Set up a standalone EAS proxy to filter email traffic from the managed devices to an email server.
5. Create compliance policies.
6. Create device groups.
7. Configure devices.
9. Test device enrollment in the Self Service Portal.
3 Activate Mobile Advanced licenses

With Mobile Advanced licenses you can use Sophos Mobile to manage the Sophos Mobile Security, Sophos Secure Workspace and Sophos Secure Email apps.

You activate Mobile Advanced licenses in Sophos Central Admin:

In Sophos Central Admin, click your account name (upper right of the user interface), select Licensing and then enter your license key in the Apply Activation Code field.

When the key is activated, the license details are displayed.
4 Configure settings

Configure the following settings:

• Personal settings, for example the platforms you want to manage
• Technical support contact details
• Self Service Portal settings

4.1 Configure personal settings

You can adjust the appearance of Sophos Mobile Admin to your personal preferences. For example, you can set the language, the time zone, or the visible device platforms.

Note
These settings only affect the administrator account you’re currently signed in with.

1. On the menu sidebar, under SETTINGS, click Setup > General, and then click the Personal tab.
2. Configure the following settings:

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Time zone</td>
<td>The time zone in which dates are shown.</td>
</tr>
<tr>
<td>Unit system</td>
<td>The unit system for lengths (Metric or Imperial).</td>
</tr>
<tr>
<td>Lines per page in tables</td>
<td>The maximum number of entries displayed per table page.</td>
</tr>
<tr>
<td>Expert mode</td>
<td>This setting turns on additional features:</td>
</tr>
<tr>
<td></td>
<td>• The Show device page includes the Custom properties tab with your custom device properties.</td>
</tr>
<tr>
<td></td>
<td>• The Show device page includes the Internal properties tab with additional properties the device reports.</td>
</tr>
<tr>
<td></td>
<td>• Several policy configuration pages include the Extra settings section to configure optional settings.</td>
</tr>
<tr>
<td>Activated platforms</td>
<td>The device platforms you want to view.</td>
</tr>
<tr>
<td></td>
<td>In Sophos Mobile Admin, only pages and settings relevant for the selected platforms are shown.</td>
</tr>
</tbody>
</table>

3. Click Save.

4.2 Configure IT contact

Provide your IT contact details so that users can get help with questions or problems.

The information you enter here is displayed on the users’ devices.
1. On the menu sidebar, under **Settings**, click **Setup > General**, and then click the **IT contact** tab.
2. Enter the contact information.
3. Click **Save**.
5 Apple Push Notification service certificates

To use the built-in Mobile Device Management (MDM) protocol of iOS and macOS devices, Sophos Mobile must use the Apple Push Notification service (APNs) to trigger the devices. APNs certificates have a validity period of one year.

5.1 Create APNs certificate

1. On the menu sidebar, under SETTINGS, click Setup > Apple setup, and then click the APNs tab.
2. Click APNs certificate wizard.
3. On the Mode page, click Create a new APNs certificate.
4. On the CSR page, click Download certificate signing request.
   This saves the certificate signing request file apple.csr to your local computer.
5. You need an Apple ID. Even if you already have an ID, we recommend that you create a new one for use with Sophos Mobile. On the Apple ID page, click Create Apple ID in the Apple portal.
   This opens an Apple web page where you can create an Apple ID for your company.

   **Note**
   Store the credentials in a safe place where your colleagues can access them. Your company will need these credentials to renew the certificate each year.

6. In the wizard, enter your new Apple ID in the Apple ID field.
   This opens the Apple Push Certificates Portal.
8. Log in with your Apple ID and upload the certificate signing request file apple.csr.
9. Download the .pem APNs certificate file and save it to your computer.
10. On the Upload page, click Upload certificate and then browse for the .pem file that you received from the Apple Push Certificates Portal.
11. Click Save.

Sophos Mobile reads the certificate and displays the certificate details on the APNs tab.
6 Standalone EAS proxy

You can set up an EAS proxy to control the access of your managed devices to an email server. Email traffic of your managed devices is routed through that proxy. You can block email access for devices, for example a device that violates a compliance rule.

The devices must be configured to use the EAS proxy as email server for incoming and outgoing emails. The EAS proxy will only forward traffic to the actual email server if the device is known in Sophos Mobile and matches the required policies. This guarantees higher security as the email server does not need to be accessible from the Internet and only devices that are authorized (correctly configured, for example with passcode guidelines) can access it. Also, you can configure the EAS proxy to block access from specific devices.

The EAS proxy is downloaded and installed separately from Sophos Mobile. It communicates with the Sophos Mobile server through an HTTPS web interface.

Note
Because macOS doesn’t support the ActiveSync protocol, you can’t use the EAS proxy to filter email traffic coming from Macs.

Features

• Support for multiple Microsoft Exchange or IBM Notes Traveler email servers. You can set up one EAS proxy instance per email server.
• Load balancer support. You can set up standalone EAS proxy instances on several computers and then use a load balancer to distribute the client requests among them.
• Support for certificate-based client authentication. You can select a certificate from a certification authority (CA), from which the client certificates must be derived.
• Support for email access control through PowerShell. In this scenario, the EAS proxy service communicates with the email server through PowerShell to control the email access of your managed devices. Email traffic happens directly from the devices to the email server and is not routed through a proxy. See Set up email access control through PowerShell (page 10).
• The EAS proxy remembers the device status for 24 hours. If the Sophos Mobile server is offline, for example during an update, email traffic is filtered based on the last known device status. After 24 hours, all email traffic is blocked.

Note
For non-iOS devices, filtering abilities of the standalone EAS proxy are limited due to the specifics of the IBM Notes Traveler protocol. Traveler clients on non-iOS devices do not send the device ID with every request. Requests without a device ID are still forwarded to the Traveler server, even though the EAS proxy is not able to verify that the device is authorized.

6.1 Download the EAS proxy installer

1. Sign in to Sophos Central Admin and go to Mobile.
2. On the menu sidebar, under **SETTINGS**, click **Setup > Sophos setup**, and then click the **EAS proxy** tab.

3. Under **External**, click the link to download the EAS proxy installer.

The installer file is saved to your local computer.

6.2 Install the standalone EAS proxy

**Prerequisites:**

- All required email servers are accessible. The EAS proxy installer will not configure connections to servers that are not available.
- You are an administrator on the computer where you install the EAS proxy.
- You know the URL of the Sophos Mobile server. See Determine the Sophos Mobile server URL (page 13).

**Note**
The Sophos Mobile server deployment guide contains schematic diagrams for the integration of the standalone EAS proxy into your company’s infrastructure. We recommend that you read the information before performing the installation and deployment of the standalone EAS proxy.

1. Run Sophos Mobile EAS Proxy Setup.exe to start the Sophos Mobile EAS Proxy - Setup Wizard.

2. On the **Choose Install Location** page, choose the destination folder and click **Install** to start installation.

   After the installation has been completed, the Sophos Mobile EAS Proxy - Configuration Wizard is started automatically and guides you through the configuration steps.

3. In the **Sophos Mobile server configuration** dialog, enter the URL of the Sophos Mobile server the EAS proxy will connect to.

   You should also select **Use SSL for incoming connections (Clients to EAS Proxy)** to secure the communication between clients and the EAS proxy.

   Optionally, select **Use client certificates for authentication** if you want the clients to use a certificate in addition to the EAS proxy credentials for authentication. This adds an additional layer of security to the connection.

4. If you selected **Use SSL for incoming connections (Clients to EAS Proxy)** before, the **Configure server certificate** page is displayed. On this page you create or import a certificate for the secure (HTTPS) access to the EAS proxy.

   - If you do not have a trusted certificate yet, select **Create self-signed certificate**.
   - If you have a trusted certificate, click **Import a certificate from a trusted issuer** and select one of the following options from the list:
     - **PKCS12 with certificate, private key and certificate chain (intermediate and CA)**
     - **Separate files for certificate, private key, intermediate and CA certificate**

5. On the next page, enter the relevant certificate information, depending on the type of certificate that you selected.
Note
For a self-signed certificate, you need to specify a server that is accessible from the client devices.

6. If you selected Use client certificates for authentication before, the SMC client authentication configuration page is displayed. On this page, you select a certificate from a certification authority (CA), from which the client certificates must be derived.
When a client tries to connect, the EAS proxy will check if the client certificate is derived from the CA that you specify here.

7. On the EAS Proxy instance setup page, configure one or more EAS proxy instances.
   • Instance type: Select EAS proxy.
   • Instance name: A name to identify the instance.
   • Server port: The port of the EAS proxy for incoming email traffic. If you set up more than one proxy instance, each of these must use a different port.
   • Require client certificate authentication: Email clients must authenticate themselves when connecting to the EAS proxy.
   • ActiveSync server: The name or IP address of the Exchange ActiveSync Server instance with which the proxy instance will connect.
   • SSL: Communication between the proxy instance and Exchange ActiveSync Server is secured by SSL or TLS (depending on what the server supports).
   • Allow EWS subscription requests from Secure Email: Select this to allow the Sophos Secure Email app on iOS to subscribe to push notifications through Exchange Web Services (EWS). Push notifications inform the device when there are messages for Secure Email.

   Note
   — By default, the EAS proxy blocks all requests to the Exchange server’s EWS interface for security reasons. If you select this check box, subscription requests are allowed. Other requests remain blocked.
   — For information on how to configure EWS for your Exchange server, see Sophos knowledge base article 127137.

   • Enable Traveler client access: Only select this check box if you need to allow access by IBM Notes Traveler clients on non-iOS devices.

8. After entering the instance information, click Add to add the instance to the Instances list.
For every proxy instance, the installer creates a certificate that you need to upload to the Sophos Mobile server. After you have clicked Add, a message window opens, explaining how to upload the certificate.

9. In the message window, click OK.
This will open a dialog, showing the folder in which the certificate has been created.

   Note
You can also open the dialog by selecting the relevant instance and clicking the Export config and upload to Sophos Mobile server link on the EAS Proxy instance setup page.

10. Make a note of the certificate folder. You need this information when you upload the certificate to Sophos Mobile.
11. Optional: Click Add again to configure additional EAS proxy instances.
12. When you have configured all required EAS proxy instances, click Next.
   The server ports that you entered are tested and inbound rules for the Windows Firewall are configured.
13. On the Allowed mail user agents page, you can specify mail user agents (i.e. email client applications) that are allowed to connect to the EAS proxy. When a client connects to the EAS proxy using an email application that is not specified, the request will be rejected.
   • Select Allow all mail user agents to configure no restriction.
   • Select Only allow the specified mail user agents and then select a mail user agent from the list. Click Add to add the entry to the list of allowed agents. Repeat this for all mail user agents that are allowed to connect to the EAS proxy.
14. On the Sophos Mobile EAS Proxy - Configuration Wizard finished page, click Finish to close the configuration wizard and return to the setup wizard.
15. In the setup wizard, make sure that the Start Sophos Mobile EAS Proxy server now check box is selected, then click Finish to complete the configuration and to start the Sophos Mobile EAS proxy for the first time.

To complete the EAS proxy configuration, upload the certificates that were created for every proxy instance to Sophos Mobile:
16. Sign in to Sophos Central Admin and go to Mobile.
17. On the menu sidebar, under SETTINGS, click Setup > Sophos setup, and then click the EAS proxy tab.
18. Under External, click Upload a file. Upload the certificate that the configuration wizard created.
   If you have set up more than one instance, repeat this for all instance certificates.
19. Click Save.
20. In Windows, open the Services dialog and restart the EASProxy service.

This completes the initial setup of the standalone EAS proxy.

Note
Every day, the EAS proxy log entries are moved to a new file, using the naming pattern EASProxy.log.yyyy-mm-dd. These daily log files are not deleted automatically and thus may cause disk space issues over time. We recommend that you set up a process to move the log files to a backup location.

6.3 Set up email access control through PowerShell

You can set up a PowerShell connection to an Exchange or an Office 365 server. This means that the EAS proxy service communicates with the email server through PowerShell to control the email access for your managed devices. Email traffic is routed directly from the devices to the email server. It is not routed through a proxy.

Note
Because macOS doesn’t support the ActiveSync protocol, you can’t use PowerShell to control email access by Macs.

The PowerShell scenario has these advantages:
• Devices communicate directly with the Exchange server.
• You do not need to open a port on your server for incoming email traffic from your managed devices.

Supported email servers are:
• Exchange Server 2013
• Exchange Server 2016
• Office 365 with an Exchange Online plan

To set up PowerShell:
1. Configure PowerShell.
2. Create a service account on the Exchange server or in Office 365. This account is used by Sophos Mobile to execute PowerShell commands.
3. Set up one or more PowerShell connection instances to Exchange or Office 365.
4. Upload the instance certificates to Sophos Mobile.

**Configure PowerShell**
1. On the computer on which you are going to install the EAS proxy, open Windows PowerShell, as an administrator, and enter:

   ```powershell
   PS C:\Windows\system32> Set-ExecutionPolicy RemoteSigned
   ```

   **Note**
   If PowerShell is not available, install it as described in the Microsoft article [Installing Windows PowerShell (external link)](https://docs.microsoft.com/en-us/powershell/scripting/install/install-windows-powershell).

2. If you want to connect to a local Exchange server, open Windows PowerShell as administrator on that computer and enter the same command as before:

   ```powershell
   PS C:\Windows\system32> Set-ExecutionPolicy RemoteSigned
   ```

   **Note**
   This step is not required for Office 365.

**Create a service account**
3. Log in to the relevant admin console:
   • For Exchange Server 2013/2016: Exchange Admin Center
   • For Office 365: Office 365 Admin Center

4. Create a user account. This account is used as a service account by Sophos Mobile to execute PowerShell commands.
   • Use a user name like `smc_powershell` that identifies the account purpose.
   • Turn off the setting to make the user change their password the next time they log in.
   • Remove any Office 365 license that was automatically assigned to the new account. Service accounts don’t require a license.

5. Create a new role group and assign it the required permissions.
   • Use a role group name like `smc_powershell`.
   • Add the Mail Recipients and Organization Client Access roles.
• Add the service account as a member.

**Set up PowerShell connections**

6. Use the setup wizard as if you would set up a standalone EAS Proxy. On wizard page **EAS Proxy instance setup**, configure the following settings:

• **Instance type**: Select **PowerShell Exchange/Office 365**.

• **Instance name**: A name to identify the instance.

• **Exchange server**: The name or IP address of the Exchange server (for a local Exchange server installation) or **outlook.office365.com** (for Office 365). Don’t include a prefix `https://` or a suffix `/powershell`. These are added automatically.

• **Allow all certificates**: The certificate that the Exchange server presents is not verified. Use this for example if you have a self-signed certificate installed on your Exchange server. Because the **Allow all certificates** option reduces the security level of the server communication, we strongly recommend that you select it only if required by your network environment.

• **Allow EWS subscription requests from Secure Email**: Select this to allow the Sophos Secure Email app on iOS to subscribe to push notifications through Exchange Web Services (EWS). Push notifications inform the device when there are messages for Secure Email.

**Note**

— By default, the EAS proxy blocks all requests to the Exchange server’s EWS interface for security reasons. If you select this check box, subscription requests are allowed. Other requests remain blocked.

— For information on how to configure EWS for your Exchange server, see Sophos knowledge base article 127137.

• **Service account**: The name of the user account you created in the Exchange or Office 365 admin console.

• **Password**: The password of the user account.

7. Click **Add** to add the instance to the **Instances** list.

8. Repeat the previous steps to set up PowerShell connections to other Exchange or Office 365 servers.

9. Complete the setup wizard as described in **Install the standalone EAS proxy** (page 8).

**Upload certificates**

10. Sign in to Sophos Central Admin and go to **Mobile**.

11. On the menu sidebar, under **SETTINGS**, click **Setup > Sophos setup**, and then click the **EAS proxy** tab.

12. Optional: Under **General**, select **Restrict to Sophos Secure Email** to restrict email access to the Sophos Secure Email app, available for Android and iOS. This prevents other email apps from connecting to your email server.

13. Under **External**, click **Upload a file**. Upload the certificate that the configuration wizard created.

    If you have set up more than one instance, repeat this for all instance certificates.

14. Click **Save**.

15. In Windows, open the **Services** dialog and restart the **EASProxy** service.

This completes the initial setup of PowerShell connections. Email traffic between a managed device and the Exchange or Office 365 servers is blocked if the device violates a compliance rule. You can block an individual device by setting the email access mode for that device to **Deny**.
Note
Depending on the configuration of your Exchange server, devices receive a notification when their email access is blocked.

6.4 Configure a connection to the standalone EAS proxy server

To configure the connection between Sophos Mobile and the standalone EAS proxy, you upload the certificate of the EAS proxy server to Sophos Mobile. The certificate was generated when you configured the EAS proxy instance.

For information on the installation and configuration of the standalone EAS proxy, see Standalone EAS proxy (page 7).

Important
If the EAS proxy service is started before you have uploaded the certificate, Sophos Mobile rejects the connection to the server and the service fails to start.

To upload the certificate of the standalone EAS proxy:
1. On the menu sidebar, under SETTINGS, click Setup > Sophos setup, and then click the EAS proxy tab.
2. Optional: Under General, select Restrict to Sophos Secure Email to restrict email access to the Sophos Secure Email app, available for Android and iOS.
   This prevents other email apps from connecting to your email server.
   If you have set up more than one EAS proxy instance, repeat this for all instances.
4. Click Save.
5. In Windows, open the Services dialog and restart the EASProxy service.

6.5 Determine the Sophos Mobile server URL

You need the Sophos Mobile server URL to configure the standalone EAS proxy. The value is displayed in the Sophos Mobile system settings.

1. Sign in to Sophos Central Admin and go to Mobile.
2. On the menu sidebar, under SETTINGS, click Setup > Sophos setup, and then click the EAS proxy tab.

   Under External, the URL of the Sophos Mobile server is displayed.
7 Compliance policies

With compliance policies you can:

- Allow, forbid or enforce certain features of a device.
- Define actions that are executed when a compliance rule is violated.

You can create different compliance policies and assign them to device groups. This allows you to apply different levels of security to your managed devices.

**Tip**
If you are planning to manage both corporate and private devices, we recommend that you define separate compliance policies for at least these two device types.

7.1 Create compliance policy

1. On the menu sidebar, under CONFIGURE, click Compliance policies.
2. On the Compliance policies page, click Create compliance policy, and then select the template the policy will be based on:
   - Default template: A selection of compliance rules, with no actions defined.
   - PCI template, HIPAA template: Compliance rules and actions based on the HIPAA and the PCI DSS security standard, respectively.
   
   Your choice of template doesn’t restrict your subsequent configuration options.
3. Enter a name and, optionally, a description for the compliance policy.
   Repeat the following steps for all required platforms.
4. Make sure that the Enable platform check box on each tab is selected.
   If this check box is not selected, devices of that platform are not checked for compliance.
5. Under Rule, configure the compliance rules for the particular platform.
   For a description of the available rules for each device type, click Help in the page header.

**Note**
Each compliance rule has a fixed severity level (high, medium, low) that is depicted by a blue icon. The severity helps you to assess the importance of each rule and the actions you should implement when it is violated.

**Note**
For devices where Sophos Mobile manages the Sophos container instead of the whole device, only a subset of compliance rules is applicable. In Highlight rules, select a management type to highlight the rules that are relevant.

6. Under If rule is violated, define the actions that will be taken when a rule is violated:

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Deny email</td>
<td>Forbid email access.</td>
</tr>
<tr>
<td>Option</td>
<td>Description</td>
</tr>
<tr>
<td>---------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>This action can only be taken if you have configured a connection to the standalone EAS proxy. See Configure a connection to the standalone EAS proxy server (page 13). This action is only available for Android, iOS, Windows and Windows Mobile devices.</td>
<td></td>
</tr>
</tbody>
</table>

**Lock container**

Disable the Sophos Secure Workspace and Secure Email apps. This affects document, email and web access that is managed by these apps.

This action can only be taken when you have activated a Mobile Advanced license.

This action is only available for Android and iOS devices.

**Set health**

Select the health status (**Red**, **Yellow**, **Green**) the device gets if it violates this rule. If the device violates more than one rule, it gets its health status from the rule that’s associated with the worst health.

Sophos Mobile reports the health status to Sophos Wireless. Depending on your Sophos Wireless configuration, network access is restricted.

This action is available for Android and iOS devices if you’ve turned on Synchronized Security. See .

**Create alert**

Trigger an alert.

The alerts are displayed on the **Alerts** page of Sophos Central Admin.

**Transfer task bundle**

Transfer a specific task bundle to the device.

This action is only available for Android, iOS, macOS and Windows devices.

We recommend that you set this to **None** at this stage. For further information, see the Sophos Mobile administrator help.

**Important**

When used incorrectly, task bundles may misconfigure or even wipe devices. To assign the correct task bundles to compliance rules, an in-depth knowledge of the system is required.

**Note**

When a device in Android enterprise device owner mode becomes non-compliant, all apps are disabled.

7. When you have made the settings for all required platforms, click **Save** to save the compliance policy under the name that you specified.

To make use of a compliance policy, you assign it to a device group. This is described in the next section.
8 Device groups

Device groups are used to categorize devices. They help you to manage devices efficiently as you can carry out tasks on a group rather than on individual devices.

A device always belongs to exactly one device group. You assign a device to a device group when you add it to Sophos Mobile.

Tip
Only group devices with the same operating system. This makes it easier to use groups for installations and other operating system specific tasks.

8.1 Create device group

1. On the menu sidebar, under MANAGE, click Device groups, and then click Create device group.
2. On the Edit device group page, enter a name and a description for the new device group.
3. Under Compliance policies, select the compliance policies that are applied to corporate and to personal devices.
4. Click Save.

Note
The device group settings contain the Enable iOS auto-enrollment option. This option allows you to enroll iOS devices with the Apple Configurator. For further information, see the Sophos Mobile administrator help.

The new device group is created and shown on the Device groups page.
9 Get started with device policies

The Policies startup wizard helps you create basic device policies for all platforms. You can enhance the policies later.

Note
Depending on the platform, you configure device settings either by a device profile (Android, iOS) or a device policy (macOS, Windows, Windows Mobile). For simplicity, this section uses the term policy for both profiles and policies.

1. On the dashboard, click Policies startup wizard in the Getting started tasks widget.

   Tip
   If you don’t see the widget, click Add widget > Getting started.

2. On the Platforms page, select the device platforms for which you want to create a policy.
   Select Android and iOS.

3. For Android, you can select a management mode.
   This setting affects which policy types are available. We recommend you use the Android enterprise mode.

4. On the Policies page, configure the following settings:
   a) Enter a name for the policy.
      For each platform, a policy with this name is created.
   b) Select the areas the policy manages.
      If you clear a check box, the corresponding wizard page is skipped. You can configure the skipped areas (and more) later.
      We suggest you select at least Password requirements and Restrictions.

5. On the Passwords page, configure requirements for the device password.
6. On the Restrictions page, configure restrictions applied to devices, like turning off the camera or other device features that could be a security risk.
7. On the Wi-Fi page, configure the connection to your corporate Wi-Fi network.
   If your Wi-Fi network uses a different security type than WPA/WPA2 PSK, you can change that setting later.
8. On the Email page, configure the connection to your corporate Microsoft Exchange email server.
   The placeholders %_USERNAME_% and %_EMAILADDRESS_% are replaced by the name and the email address of the user assigned to the device.
9. Click Finish.

For each platform you’ve selected, the wizard creates a policy.

To view the policy, click Profiles, policies in the menu sidebar and then click the device platform.

To change the areas managed, click the policy’s name and then click Add configuration.

If you’ve selected the Android enterprise mode, you must set up Android enterprise for your organization before you can enroll devices. See the Sophos Mobile administrator help.
10 Create task bundle for Android devices

1. On the menu sidebar, under **CONFIGURE**, click **Task bundles > Android**.
2. On the **Task bundles** page, click **Create task bundle**.
   The **Edit task bundle** page is displayed.
3. Enter a name and, optionally, a description for the new task bundle in the relevant fields.
   The version is automatically incremented every time you save the task bundle.
4. Optional: Select **Selectable for compliance actions** to transfer the task bundle onto a device when it violates a compliance rule. See **Compliance policies** (page 14).

   **Note**
   This option is disabled when you edit an existing task bundle and the task bundle is already used as a compliance action.

5. Click **Create task**, select **Enroll** and enter a name for the task. Click **Apply** to create the task.
   The name that you enter here will be displayed in the Self Service Portal while the task is processed.
6. Click **Create task** again and select **Install profile or assign policy**. Give the task a meaningful name, for example **Install password policies profile**, and select the profile you have created. Click **Apply** to create the task.
7. If you have configured profiles for Exchange, VPN or Wi-Fi settings, repeat the previous step for each profile.
8. Optional: Add further tasks to the task bundle.

   **Tip**
   You can change the installation order of the tasks by using the sort arrows on the right-hand side of the tasks list.

9. After you have added all required tasks to the task bundle, click **Save** on the **Edit task bundle** page.
   The task bundle is available for transfer. It is displayed on the **Task bundles** page.
11 Create task bundle for iOS devices

1. On the menu sidebar, under CONFIGURE, click Task bundles > iOS.
2. On the Task bundles page, click Create task bundle.
   The Edit task bundle page is displayed.
3. Enter a name and, optionally, a description for the new task bundle in the relevant fields.
   The version is automatically incremented every time you save the task bundle.
4. Optional: Select Selectable for compliance actions to transfer the task bundle onto a device when it violates a compliance rule. See Compliance policies (page 14).

   **Note**
   This option is disabled when you edit an existing task bundle and the task bundle is already used as a compliance action.

5. Optional: Select Ignore app installation failures to continue the task bundle processing even if an app installation fails.
   This option is disabled when the task bundle contains no Install app task.
6. Click Create task, select Enroll and enter a name for the task. Click Apply to create the task.
   The name that you enter here will be displayed in the Self Service Portal while the task is processed.
7. Click Create task again and select Install profile or assign policy. Give the task a meaningful name, for example Install password policies profile, and select the profile you have created. Click Apply to create the task.
8. If you have configured profiles for Exchange, VPN or Wi-Fi settings, repeat the previous step for each profile.

   **Tip**
   You can change the installation order of the tasks by using the sort arrows on the right-hand side of the tasks list.

10. After you have added all required tasks to the task bundle, click Save on the Edit task bundle page.
   The task bundle is available for transfer. It is displayed on the Task bundles page.
12 Configure Self Service Portal settings

1. On the menu sidebar, under SETTINGS, click Setup > Self Service Portal.
2. Click Enrollment texts and then add a terms of use text and a post-enrollment text. When you assign these texts to your Self Service Portal configuration, they are displayed before and after the enrollment, respectively.
3. On the Self Service Portal configurations page, click Add to create a configuration.
4. Configure the following settings:

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>The name of the configuration. In the Self Service Portal, users select a configuration by this name.</td>
</tr>
<tr>
<td>User groups</td>
<td>Click Add and then enter a user group. The configuration is applied to all members of that group.</td>
</tr>
<tr>
<td>Maximum number of devices</td>
<td>The maximum number of devices a user can enroll in the Self Service Portal.</td>
</tr>
<tr>
<td>Actions</td>
<td>Click Show and then select the management actions a user can perform in the Self Service Portal.</td>
</tr>
</tbody>
</table>

5. Click Add > Android.
6. In the Configure platform settings dialog, configure the following settings:

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Display name</td>
<td>The name of the platform settings. In the Self Service Portal, users select an enrollment type by this name.</td>
</tr>
<tr>
<td>Description</td>
<td>A description of the platform settings. This description is displayed in the Self Service Portal next to the name.</td>
</tr>
<tr>
<td>Owner</td>
<td>The owner mode (corporate or personal) of devices enrolled with this configuration.</td>
</tr>
<tr>
<td>Device group</td>
<td>The device group the device is added to.</td>
</tr>
<tr>
<td>Enrollment package</td>
<td>Select the Android task bundle you’ve created.</td>
</tr>
<tr>
<td>Terms of use</td>
<td>The text to be displayed in the Self Service Portal before the enrollment. Leave this field empty to display no text. Users must agree to the text to proceed with the enrollment.</td>
</tr>
</tbody>
</table>
### Post-enrollment text

The text to be displayed in the Self Service Portal after the enrollment.

Leave this field empty to display no text.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Post-enrollment text</td>
<td>The text to be displayed in the Self Service Portal after the enrollment.</td>
</tr>
<tr>
<td></td>
<td>Leave this field empty to display no text.</td>
</tr>
</tbody>
</table>

7. Click **Apply** to add the platform settings to the Self Service Portal configuration.
8. Click **Add > iOS**, and then repeat the configuration steps you performed for Android.
9. On the **Edit Self Service Portal configuration** page, click **Save**.

There always is a **Default** configuration. This configuration has the lowest priority, so that it is only used when no other configuration matches a user.
13 Test device enrollment through the Self Service Portal

We recommend that you test device enrollment through the Self Service Portal before you roll out the Self Service Portal to your users.

Log in to the Self Service Portal with a test user account you created for yourself and perform test enrollments for all platforms that you want to manage with Sophos Mobile.
14 Use the **Add device** wizard

You can easily enroll new devices with the **Add device** wizard. It provides a workflow that combines the following tasks:

- Add a new device to Sophos Mobile.
- Optional: Assign a user to the device.
- Enroll the device.
- Optional: Transfer a task bundle to the device.

1. On the menu sidebar, under **MANAGE**, click **Devices**, and then click **Add > Add device wizard**.

   **Tip**
   Alternatively, you can start the wizard in the following ways:
   - From the **Dashboard** page by clicking the **Add device** widget.
   - From the Sophos Central Admin menu by clicking **Protect Devices > Start device enrollment wizard**.

2. On the **User** page, either enter search criteria to look up a user the device will be assigned to, or select **Skip user assignment** to enroll a device that will not be assigned to a user yet.

   **Note**
   You can search for partial strings, but only from the start of a field. For example, the search string `example` matches `Example User` and `example@company.com` but not `user@example.com`.

3. On the **User selection** page, select the required user from the list of users matching your search criteria.

4. On the **Device details** page, configure the following settings:

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Platform</strong></td>
<td>The device platform.</td>
</tr>
<tr>
<td><strong>Name</strong></td>
<td>A unique name under which the device will be managed by Sophos Mobile.</td>
</tr>
<tr>
<td><strong>Description</strong></td>
<td>An optional description of the device.</td>
</tr>
<tr>
<td><strong>Phone number</strong></td>
<td>An optional phone number. Enter the number in international format, for example +491701234567.</td>
</tr>
<tr>
<td><strong>Email address</strong></td>
<td>The email address to which the enrollment instructions are sent. This is the email address of the user assigned to the device, as configured in Sophos Central user management.</td>
</tr>
<tr>
<td><strong>Owner</strong></td>
<td>Select the device owner type: either <strong>Corporate</strong> or <strong>Personal</strong>.</td>
</tr>
<tr>
<td><strong>Device group</strong></td>
<td>Select the device group the device will be assigned to. If you have not created a device group yet, you can select the device group <strong>Default</strong>, which is always available.</td>
</tr>
</tbody>
</table>
5. On the **Enrollment type** page, select whether you want to enroll the device or only the Sophos container.
   Select **Enroll device**.
6. Select the task bundle you’ve configured for the device platform.
7. On the **Enrollment** page, follow the instructions to complete the enrollment process.
8. When enrollment has been completed successfully, click **Finish**.

**Note**
- When you have made all the selections, you can close the wizard without having to wait for the **Finish** button to appear. An enrollment task is created and processed in the background.
15 Glossary

**ad hoc provisioning profile**
A distribution provisioning profile you add to a self-developed iOS app. This allows you to install the app on designated devices without having to publish it to the App Store.

**enrollment**
The registration of a device with Sophos Mobile.

**Enterprise App Store**
An app repository that is hosted on the Sophos Mobile server. The administrator can use Sophos Mobile Admin to add apps to the Enterprise App Store. Users can then use the Sophos Mobile Control app to install these apps onto their devices.

**Mobile Advanced license**
With a license of type Mobile Advanced you can manage the Sophos Mobile Security, Sophos Secure Workspace and Sophos Secure Email apps through Sophos Mobile.

**provisioning**
The process of installing the Sophos Mobile Control app on a device.

**SMSec**
Abbreviation for Sophos Mobile Security.

**Sophos Central Admin**
The web interface that you use to manage devices.

**Sophos Central Self Service portal**
The web interface that allows users to enroll their own devices and carry out other tasks without having to contact the helpdesk.

**Sophos Mobile client**
The Sophos Mobile Control app that is installed onto devices managed by Sophos Mobile.

**Sophos Mobile Security**
A security app for Android devices. You can manage this app with Sophos Mobile, provided that a license of type Mobile Advanced is activated.

**Sophos Secure Email**
An app for Android and iOS devices that provides a secure container for managing your email, calendar and contacts. You can manage this app with Sophos Mobile, provided that a license of type Mobile Advanced is activated.

**Sophos Secure Workspace**
An app for Android and iOS devices that provides a secure workspace where you can browse, manage, edit, share, encrypt and decrypt documents from various storage providers or distributed by your company. You can manage this app with Sophos Mobile, provided that a license of type Mobile Advanced is activated.

**task bundle**
You create a package to bundle several tasks into one transaction. You can bundle all tasks...
necessary to have a device fully enrolled and running.

**Team ID**

Every iOS and macOS app is signed by a Team ID. The Team ID is supplied by Apple and is unique to a specific development team.
16 Technical support

You can find technical support for Sophos products in any of these ways:

- Visit the Sophos Community at community.sophos.com/ and search for other users who are experiencing the same problem.
- Open a ticket with our support team at https://secure2.sophos.com/support/contact-support/support-query.aspx.
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