

NERDIOCON'26

Nerdio Manager for MSP: product roadmap

Tony Cai, Andy Weidner, Chuck Mikuzis

Thank you for in advance
for attending this session...

Nerdio Manager for MSP: MSPs are at an inflection point

- “Not because of competition. Not because of pricing. Because complexity is winning.”
- “More tools. More tenants. More policies. More alerts. And now... AI enters the picture.”
- “The question isn’t: Do you have the right tools? The question is: Can you actually control your environments anymore?”

SPEAKERS



Tony Cai

Sr Director, MSP Product
16-year MSP Rebel
Leader



Chuck Mikuzis

Product Manager
21-year MSP and
Enterprise Jedi



Andy Weidner

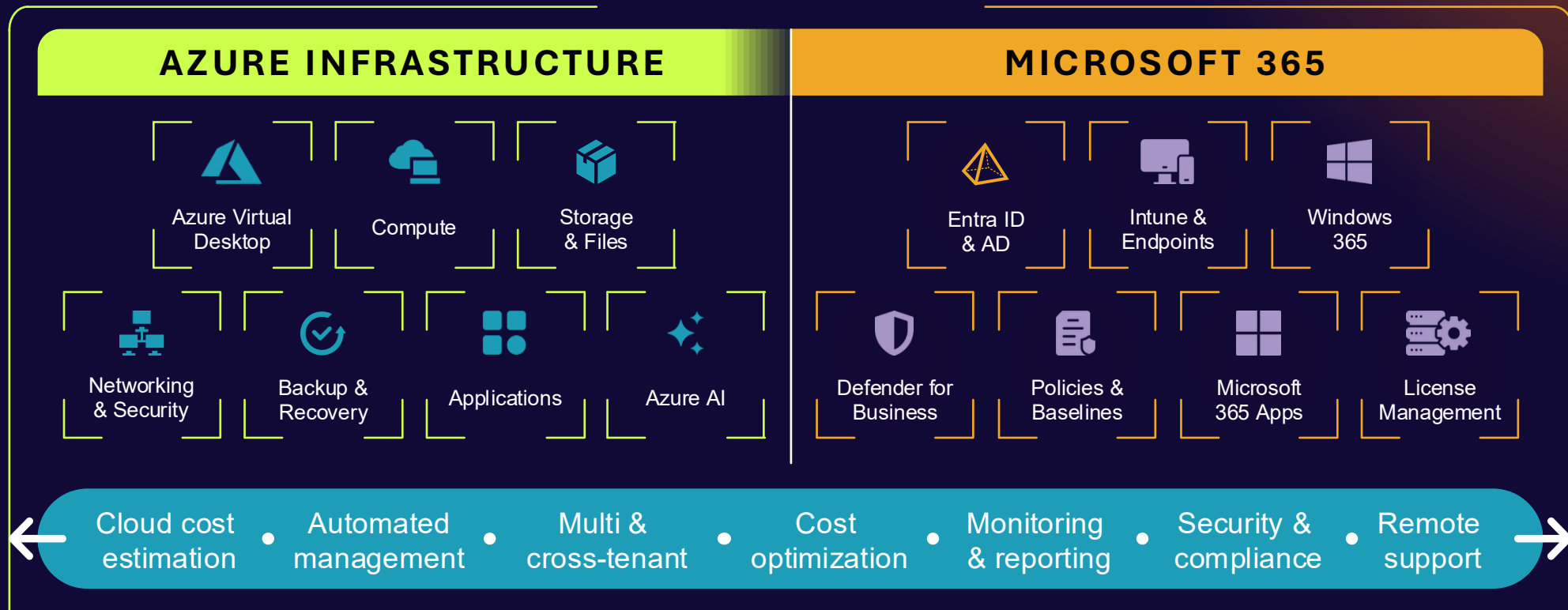
Sr Product Manager
10-year MSP Jedi

Let's be honest about today's reality...

- “Every new customer = reinventing the wheel”
- “Every tenant slightly different”
- “Every engineer doing things ‘their way’”
- “Azure costs... unpredictable”
- “You’re still feel reactive, not proactive”

- And now... AI

Harness the future of AVD and Microsoft 365 management



Nerdio Manager for MSP v7.0

May 2026 (NerdioCon 2026)

- ✓ New Main Menu
- ✓ Entra Authentication for Azure Files
- ✓ Azure Files Provisioned v2 Storage
- ✓ Entra B2B Support for AVD
- ✓ Nerdio Easy Start
- ✓ Application Deployment Wizard
- ✓ Reporting Engine
- ✓ Purview Solutions Baselines
- ✓ Smart User Tags
- ✓ Insights Dashboard
- ✓ PSA Integration
- ✓ Solutions Baseline Templates: CIS, Nerdio, Huntress
- ✓ Notifications: CSP License Expiration
- ✓ Microsoft GCC Support
- ✓ Prospect Tenant Assessment Wizard
- ✓ Baselines Assessment Wizard
- ✓ New Nerdio Intune Canned Policies
- ✓ User Offboarding Flows

What we're hearing from the field



What we're hearing from the field



NERDIOCON'26

H2 & beyond is about turning Nerdio Manager for MSP from a tool to a system

Visibility, control, & governance is the new advantage

EPISODE 1 – Eliminate complexity

Future of Easy Start

Tenant Assessments

Merging of Baselines

Policy Lifecycle

Baseline Templates

AVD Hybrid

Easy Bake... Easy Start

- The "3-click" concept
- Take complex topics (with complex functionality) and reduce them down

It all started with... Easy Start

Easy Start

- “Now what do I do?”
- “Where do I start?”
- “What does Nerdio recommend?”
- “Show me your Jedi tricks!”

Easy Start: user stories

What do you plan to use Nerdio Manager for?



Essential tenant standardization

I want to set up my customers' Microsoft 365 environments using industry standard security settings, user management, and reporting.



Essential policy management

I want to set up my customers' Microsoft 365 environments using industry standard security settings, Defender for Office 365 policies, Conditional Access Policies, Purview DLP policies, and reporting.



Azure Virtual Desktop

I want to set up my customers' existing Azure Virtual Desktop environment.



Advanced mode

I am familiar with Nerdio Manager for MSP's capabilities and want the full product experience.

Easy Start: Notifications and PSA integration



Notifications

How do you want to receive essential notifications from Nerdio Manager?

Nerdio Manager for MSP will configure and send essential notifications on Azure Virtual Desktop management operations, Azure Files Share capacity, desktop imaging tasks, and Nerdio updates.



Email



Enter your email address here...



PSA integration

Choose from Data Autodesk PSA, Connectionwise PSA, or Halo PSA.

Easy Start: White labeling

White label

Customize your Nerdio for MSP

1

Logo upload

Recommended size: 140px by 40px
Supported file types: JPG, SVG, or PNG (10MB)

 Browse files

Or provide an image URL

https://

2

Collapsed logo

Recommended size: 40px by 40px
Supported file types: JPG, SVG, or PNG (10MB)

 Browse files

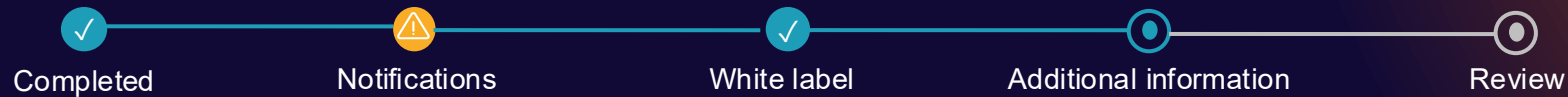
Or provide an image URL

https://

2

Application name

Easy Start: Tenant standardization options



Essential tenant standardization

Frame alignment

Nerdio offers pre-packaged Microsoft 365 portal configurations based on industry partners/standards; please choose a package.



Security and configuration recommendations from Nerdio. A great place to start.




High security recommendations from Huntress.



High security recommendations from CIS. Great starting point when compliance with industry security standards such as NIST, Cyber Essentials Plus, GDPR, Essential 8, PCI-DSS, HIPAA is required.

Easy Start: A tailored Nerdio Manager experience



- Choose an Account Admin Level >
- SYSTEM >
- VIEWS >
- REPORTING >
- ACCOUNTS
- SHARED RESOURCES >
- COST ESTIMATOR >

Accounts

Accounts > Accounts Tasks 2

Name	Tag	Azure Info	Configuration Info	Usage	Actions
Account #1 Active	MSP - LAB	Azure Tenant: rivierebravo.onmicrosoft.com Subscription(s): FY21 MPN Sponsored Subscription Azure Region(s): centralus, eastus App Registration: dd1d7493-22fd-4a2e-906c-59fd8eb062c3	Identity: Entra ID AD User Management Connection: Connected Created: Sep 30, 2024 10:49 PM	Current AVD Users: 97 (+3) Current CPC-Only Users: 0 Current Intune-Only Users: 0 Host Pools: 6 / CPU Cores: 20 / IUL: Yes Last Usage: Feb 6, 2025 10:27 AM	[Action]
Account #2 Active	CUSTOMER - STAGING	Azure Tenant: rivierebravo.onmicrosoft.com Subscription(s): FY21 MPN Sponsored Subscription Azure Region(s): centralus, eastus App Registration: dd1d7493-22fd-4a2e-906c-59fd8eb062c3	Identity: Entra ID AD User Management Connection: Connected Created: Sep 30, 2024 10:49 PM	Current AVD Users: 97 (+3) Current CPC-Only Users: 0 Current Intune-Only Users: 0 Host Pools: 6 / CPU Cores: 20 / IUL: Yes Last Usage: Feb 6, 2025 10:27 AM	[Action]
Account #3 Active	MSP - PRODUCTION	Azure Tenant: rivierebravo.onmicrosoft.com Subscription(s): FY21 MPN Sponsored Subscription Azure Region(s): centralus, eastus App Registration: dd1d7493-22fd-4a2e-906c-59fd8eb062c3	Identity: Entra ID AD User Management Connection: Connected Created: Sep 30, 2024 10:49 PM	Current AVD Users: 97 (+3) Current CPC-Only Users: 0 Current Intune-Only Users: 0 Host Pools: 6 / CPU Cores: 20 / IUL: Yes Last Usage: Feb 6, 2025 10:27 AM	[Action]

<< < Previous 1 Next > >>
Showing 3 of 3 results

Nerdio Easy Start: Everything you need—nothing you don't

A simplified experience keeps onboarding fast and consistent, while advanced capabilities are always within reach.

Easy Start: Easy bake future

- Deliver our pre-canned items to any install.
- Focus on two new user stories: Device management and security and compliance.
- Review all our functionality and make it easy:
 1. Start with app deployment wizard
 2. Policy management experience



Assessments

- ALL FEATURES
- ACCOUNTS
- INSIGHTS
- GLOBAL VIEWS
- BASELINES**
- POLICIES
- APPLICATIONS
- SCRIPTING
- SHARED SETTINGS
- NOTIFICATIONS
- TOOLS
- SYSTEM

Baselines > Assessments

Assessment Assessment Tasks 1 20

Accounts	Scope	Status	Created Date	Completed Date	Remediation	Actions
Contoso Ltd	Individual Policies (7) Policy Baselines (2) Solution Baselines (8)	COMPLETED	Apr 28, 2026 12:15 PM	Apr 28, 2026 12:16 PM 3 days ago	—	⋮
Contoso Ltd	Individual Policies (7) Policy Baselines (1) Solution Baselines (9)	COMPLETED	Apr 28, 2026 12:29 PM	Apr 28, 2026 12:30 PM 3 days ago	—	⋮
Contoso Ltd	Individual Policies (1) Policy Baselines (1) Solution Baselines (1)	COMPLETED	Apr 29, 2026 10:38 AM	Apr 29, 2026 10:38 AM 2 days ago	—	⋮
Contoso Ltd	Individual Policies (2) Policy Baselines (1) Solution Baselines (2)	COMPLETED	May 1, 2026 11:06 AM	May 1, 2026 11:07 AM 2 hours ago	—	⋮
Nerdio Andy nerdioandy.onmicrosoft.com	Individual Policies (3) Policy Baselines (3) Solution Baselines (3)	COMPLETED	May 1, 2026 12:23 PM	May 1, 2026 12:23 PM 17 minutes ago	—	⋮

Refresh All Add Assessment



Assessment Wizard

Assessments

ALL FEATURES

ACCOUNTS

INSIGHTS

GLOBAL VIEWS

BASELINES

POLICIES

APPLICATIONS

SCRIPTING

SHARED SETTINGS

NOTIFICATIONS

TOOLS

SYSTEM

Baselines > Assessments

Assessment Assessment Tasks 1 20

Accounts	Scope	Status	Created Date	Completed Date	Remediation	Actions
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Nerdio Andy nerdioandy.onmicrosoft.com	Individual Policies (3) Policy Baselines (3) Solution Baselines (3)	COMPLETED	May 1, 2026 12:23 PM	May 1, 2026 12:23 PM 17 minutes ago	—	⋮

Previous 1 Next Showing 5 of 5 Page Size: 10

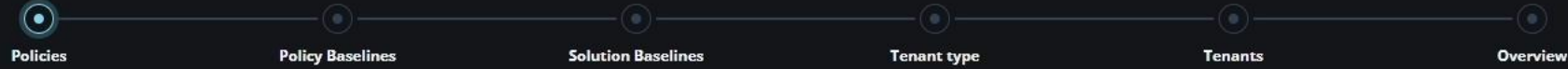
Refresh All Add Assessment



Tenant Assessment Wizard

- ALL FEATURES
- ACCOUNTS
- INSIGHTS
- GLOBAL VIEWS
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- SCRIPTING
- SHARED SETTINGS
- NOTIFICATIONS
- TOOLS
- SYSTEM

Baselines > Assessments > Tenant Assessment Wizard



Available Policies

Search [All types] [All tags]

Policy Name	Policy Type	Version	Last Modified
CA001: Require multi-factor authentication for admins	Conditional Access Policy	Latest	May 1, 2026
CA005: Require multi-factor authentication for guest access	Conditional Access Policy	Latest	Mar 20, 2026
NMM Force Bitlocker for fixed and removable disks	Security Baseline Policy	Latest	Dec 23, 2025
NMM Force Bitlocker for fixed disks only	Security Baseline Policy	Latest	May 1, 2026
NMM Auto subscribe for Remote Desktop & AVD	Configuration Policy	Latest	Mar 20, 2026
NMM Disable Widgets	Configuration Policy	Latest	May 1, 2026
NMM Change the default wallpaper by variable	Configuration Policy	Latest	Mar 20, 2026

Selected Policies (0)

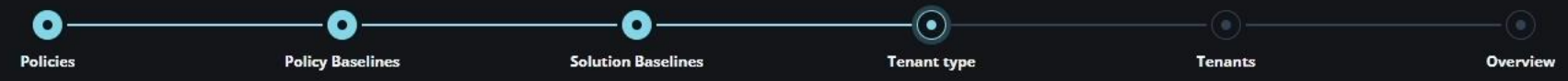
Policy Name	Policy Type	Version
No policies selected		




Tenant Assessment Wizard

- ALL FEATURES
- ACCOUNTS
- INSIGHTS
- GLOBAL VIEWS
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Baselines > Assessments > Tenant Assessment Wizard



Choose the tenant type for your assessment:

 **CUSTOMER TENANTS**
 Select one or more customers with the Modern Work feature enabled

 **PROSPECT TENANTS**
 Provide tenant credentials with read-only permissions

Back Next Step





Tenant Assessment Wizard

- ALL FEATURES
- ACCOUNTS
- INSIGHTS
- GLOBAL VIEWS
- BASELINES**
- POLICIES
- APPLICATIONS
- SCRIPTING
- SHARED SETTINGS
- NOTIFICATIONS
- TOOLS
- SYSTEM

Baselines > Assessments > Tenant Assessment Wizard



<input type="checkbox"/>	Customer Account	Modern Work Enabled	Tenant	Account Creation Date
<input type="checkbox"/>	Contoso Ltd	Yes	andrewweidner.onmicrosoft.com	Jan 20, 2026
<input type="checkbox"/>	Northwind Traders, School of Fine Art ⚠	No	nerdioandy.onmicrosoft.com	Mar 12, 2025, Mar 21, 2025

Navigation: Previous, 1, Next, Showing 2 of 2, Page Size: 10

Back Next Step



Tenant Assessment Wizard

Baselines > Assessments > Tenant Assessment Wizard

Beta Conditions are not satisfied (features "Conditional Access Policies", "Configuration Policies", "Defender for O365 Policies", "Security Baselines", "Endpoint Security Policies"). For tenant dd506c2a-ebc8-49fd-91c0-eb57c1942705. To be able to use the feature, you need at least one account with satisfied conditions:

(21) Northwind Traders

- All of these API permissions need to be available:
 - User.Invite.All

(23) School of Fine Art

- All of these API permissions need to be available:
 - User.Invite.All

Policy Baselines	Solution Baselines	Tenant type	Tenants	Overview
<input type="checkbox"/>	Modern Work Enabled	Tenant		Account Creation Date
<input type="checkbox"/>	Yes	andrewweidner.onmicrosoft.com		Jan 20, 2026
<input type="checkbox"/>	No	nerdioandy.onmicrosoft.com		Mar 12, 2025, Mar 21, 2025

Showing 2 of 2 Page Size: 10

Back Next Step





Tenant Assessment Wizard

- ALL FEATURES
- ACCOUNTS
- INSIGHTS
- GLOBAL VIEWS
- BASELINES**
- POLICIES
- APPLICATIONS
- SCRIPTING
- SHARED SETTINGS
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- SYSTEM

Baselines > Assessments > Tenant Assessment Wizard

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(23) School of Fine Art

- All of these API permissions need to be available:
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	Modern Work Enabled	Tenant	Account Creation Date
<input type="checkbox"/>	Yes	andrewweidner.onmicrosoft.com	Jan 20, 2026
<input type="checkbox"/>	No	nerdioandy.onmicrosoft.com	Mar 12, 2025, Mar 21, 2025

Showing 2 of 2 Page Size: 10

Back Next Step



Assessments

ALL FEATURES

ACCOUNTS

INSIGHTS

GLOBAL VIEWS

BASELINES

POLICIES

APPLICATIONS

SCRIPTING

SHARED SETTINGS

NOTIFICATIONS

TOOLS

SYSTEM

Baselines > Assessments

Assessment | Assessment Tasks 1 17

Accounts	Scope	Status	Created Date	Completed Date	Remediation	Actions
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Contoso Ltd	Individual Policies (2) Policy Baselines (1) Solution Baselines (2)	COMPLETED	May 1, 2026 11:06 AM	May 1, 2026 11:07 AM an hour ago	—	⋮
Contoso Ltd	Individual Policies (3) Policy Baselines (3) Solution Baselines (3)	COMPLETED	May 1, 2026 11:39 AM	May 1, 2026 11:39 AM 42 minutes ago	FAILED	⋮



Microsoft Edge window: **Sign in to your account - [InPrivate] - Microsoft Edge**
URL: <https://login.microsoftonline.com/common/SAS/ProcessAuth>

Microsoft
admin@nerdioandy.onmicrosoft.com

Permissions requested

web-admin-portal-kh4w77qqsoggy
unverified

This application is not published by Microsoft.

This app would like to:

- ✓ Access the directory as you
- ✓ Read security incidents
- ✓ Read your organization's security events
- ✓ Read your organization's policies
- ✓ Read Microsoft Intune Device Configuration and Policies
- ✓ Read Microsoft Intune configuration
- ✓ Read devices Microsoft Intune devices
- ✓ Read Microsoft Intune apps
- ✓ View your basic profile
- ✓ Maintain access to data you have given it access to

Consent on behalf of your organization

Tenant Wizard

Andy Weidner

Tenant Assessment Wizard

- Policy Baselines
- Solution Baselines
- Tenant type
- Tenants**
- Overview

Include in the assessment:

[Connect Tenant](#)

Domain	Signed in as
No prospect tenants connected yet. Click "Connect Tenant" to add one.	

[Back](#) [Next Step](#)

TOOLS
SYSTEM

manager for msp

- ALL FEATURES
- ACCOUNTS
- INSIGHTS
- GLOBAL VIEWS
- BASELINES**
- POLICIES
- APPLICATIONS
- SCRIPTING
- SHARED SETTINGS
- NOTIFICATIONS
- TOOLS
- SYSTEM

Assessments

Baselines > Assessments

Assessment Assessment Tasks ✓ 17

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Contoso Ltd	Individual Policies (2) Policy Baselines (1) Solution Baselines (2)	COMPLETED	May 1, 2026 11:06 AM	May 1, 2026 11:07 AM 40 minutes ago	—	⋮
Contoso Ltd	Individual Policies (3) Policy Baselines (3) Solution Baselines (3)	COMPLETED	May 1, 2026 11:39 AM	May 1, 2026 11:39 AM 8 minutes ago	—	⋮

Navigation: Previous 1 Next Showing 5 of 5 Page Size: 10

Refresh All Add Assessment



- manager for msp
- ALL FEATURES
- ACCOUNTS
- INSIGHTS
- GLOBAL VIEWS
- BASELINES**
- POLICIES
- APPLICATIONS
- SCRIPTING
- SHARED SETTINGS
- NOTIFICATIONS
- TOOLS
- SYSTEM

Assessment Detail

Baselines > Assessments > Assessment Detail

Assessment #7 COMPLETED Tenant Type: Customer Created: May 1, 2026 11:39 AM Completed: May 1, 2026 11:39 AM

ASSESSMENT DETAILS

Customer Accounts 1

Contoso Ltd
andrewweidner.onmicrosoft.com

Policies 3

- CA001: Require multi-factor authentication for admins**
Conditional Access Policy
- NMM Disable Widgets**
Configuration Policy
- Test Anti-phishing v2**
Anti-phishing Policy

Policy Baselines 3

- Defender for Endpoint**
2 policies included
- CA Location Variables**
2 policies included
- AndyTest 2**
1 policies included

Solution Baselines 3

- Solution Baseline for Defender for Endpoint**
- Solution Baseline for Intune - Silver Tier**
- Solution Baseline for Defender for Endpoint - CIS L1**

POLICY IMPACT ANALYSIS

SOLUTION BASELINE ASSESSMENT



manager for msp

- ALL FEATURES
- ACCOUNTS
- INSIGHTS
- GLOBAL VIEWS
- BASELINES**
- POLICIES
- APPLICATIONS
- SCRIPTING
- SHARED SETTINGS
- NOTIFICATIONS
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Assessment Detail

Baselines > Assessments > Assessment Detail

POLICY IMPACT ANALYSIS

Unmanaged Policy	Global Policy	Tenant (Accounts)	Conflict	Impact
Require ATP ID: 48d02f3e-c4af-4dca-b53c-15f14ee8dfd2	↔ CA001: Require multi-factor authentication for admins	Contoso Ltd	View Conflicts	High Impact
Block Non-US ID: ffd4a97-54d1-445f-9866-4ef23d482b8	↔ CA001: Require multi-factor authentication for admins	Contoso Ltd	View Conflicts	High Impact
CA003: Block legacy authentication ID: 0b2b7cc2-c67e-44e2-8c25-eedad28603a	↔ CA001: Require multi-factor authentication for admins	Contoso Ltd	View Conflicts	High Impact
CA010: Block access for unknown or unsupported device platform ID: 0ebfbcec-47ca-4075-bd00-d2e7478d37e7	↔ CA001: Require multi-factor authentication for admins	Contoso Ltd	View Conflicts	High Impact
CA011: No persistent browser session ID: c2dbfef8-f0ee-4c60-9256-20f3bd9d52cc	↔ CA001: Require multi-factor authentication for admins	Contoso Ltd	View Conflicts	High Impact
CA014: Use application enforced restrictions for unmanaged devices ID: b4606e73-a558-4304-a78d-8aa7e18eccb4	↔ CA001: Require multi-factor authentication for admins	Contoso Ltd	View Conflicts	High Impact
AMOL-LAB1 ID: 0c230e0e-9923-438d-b979-01553ba74b0d	↔ CA001: Require multi-factor authentication for admins	Contoso Ltd	View Conflicts	High Impact
CA001: Require multi-factor authentication for admins_edited ID: 85b1c5a1-8b45-4bda-a5c5-95cc6c17ab9b	↔ CA001: Require multi-factor authentication for admins	Contoso Ltd	View Conflicts	High Impact
CA014: Use application enforced restrictions for unmanaged devices ID: 3c4ba336-750d-4110-b41c-9b6b003c2aa6	↔ CA001: Require multi-factor authentication for admins	Contoso Ltd	View Conflicts	High Impact
CA - Role Test MSP Tenant	↔ CA001: Require multi-factor authentication for admins	Contoso Ltd	View Conflicts	High Impact

Assessment Detail

Policy conflicts

CA010: Block access for unknown or unsupported device platform (unmanaged)

CA001: Require multi-factor authentication for admins (global)

High Impact

The values of following settings will be overwritten:

- grantControls.builtInControls[0]
- state

Low Impact

Policy name/description will be overwritten

Unmanaged Policy

```

3  "conditions": {
14  "platforms": {
21  "includePlatforms": [
22    "all"
23  ]
24  },
25  "servicePrincipalRiskLevels": [],
26  "signInRiskLevels": [],
27  "userRiskLevels": [],
28  "users": {}
29  },
30  "displayName": "CA010: Block access for unknown or unsupported device platform",
31  "grantControls": {
32    "builtInControls": [
33      "block"
34    ],
35    "customAuthenticationFactors": [],
36    "operator": "OR",
37    "termsOfUse": []
38  },
39  "state": "disabled"

```

Global Policy

```

3  "conditions": {
14  "servicePrincipalRiskLevels": [],
15  "signInRiskLevels": [],
16  "userRiskLevels": [],
17  "users": {}
18  },
19+ "displayName": "CA001: Require multi-factor authentication for admins",
20  "grantControls": {
21    "builtInControls": [
22+    "mfa"
23  ],
24  "customAuthenticationFactors": [],
25  "operator": "OR",
26  "termsOfUse": []
27  },

```

OK

Impact

High Impact

High Impact

High Impact

High Impact

High Impact

High Impact

High Impact

High Impact

High Impact



Assessments

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- ACCOUNTS
- INSIGHTS
- GLOBAL VIEWS
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Baselines > Assessments

Assessment Assessment Tasks ✓ 17

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Contoso Ltd	Individual Policies (2) Policy Baselines (1) Solution Baselines (2)	COMPLETED	May 1, 2026 11:06 AM	May 1, 2026 11:07 AM 44 minutes ago	—	⋮
Contoso Ltd	Individual Policies (3) Policy Baselines (3) Solution Baselines (3)	COMPLETED	May 1, 2026 11:39 AM	May 1, 2026 11:39 AM 12 minutes ago	—	⋮

Navigation: Previous 1 Next Showing 5 of 5 Page Size: 10

Refresh All Add Assessment



manager for msp

- ALL FEATURES
- ACCOUNTS
- INSIGHTS
- GLOBAL VIEWS
- BASELINES**
- POLICIES
- APPLICATIONS
- SCRIPTING
- SHARED SETTINGS
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Remediation Wizard

Baselines > Assessments > Remediation Wizard

New UI

	Scope	Determine Remediation	Solution Baseline Remediation	Assignments	Summary	
	ID: 48d02f3e-c4af-4dca-b53c-15...	admins	Contoso Ltd	View Conflicts	High Impact	Split Policy
Block Non-US	ID: ffd4a97-54d1-445f-9866-4ef...	CA001: Require multi-factor authentication for admins	Contoso Ltd	View Conflicts	High Impact	Split Policy
CA003: Block legacy authentication	ID: 0b2b7cc2-c67e-44e2-8c25-e...	CA001: Require multi-factor authentication for admins	Contoso Ltd	View Conflicts	High Impact	Split Policy
CA010: Block access for unknown or unsupported device platform	ID: 0ebfbcec-47ca-4075-bd00-d...	CA001: Require multi-factor authentication for admins	Contoso Ltd	View Conflicts	High Impact	Split Policy
CA011: No persistent browser session	ID: c2dbfef8-f0ee-4c60-9256-20f...	CA001: Require multi-factor authentication for admins	Contoso Ltd	View Conflicts	High Impact	Split Policy
CA014: Use application enforced restrictions for unmanaged devices	ID: b4606e73-a558-4304-a78d-8...	CA001: Require multi-factor authentication for admins	Contoso Ltd	View Conflicts	High Impact	Split Policy
AMOL-LAB1	ID: 0c230e0e-9923-438d-b979-0...	CA001: Require multi-factor authentication for admins	Contoso Ltd	View Conflicts	High Impact	Split Policy

Navigation: Previous, 1, 2, 3, 4, ..., 6, Next, Showing 10 of 55, Page Size: 10

⚠ If no action is selected, then the 'Leave As-Is' action will be applied.

Filters, Back, Next Step



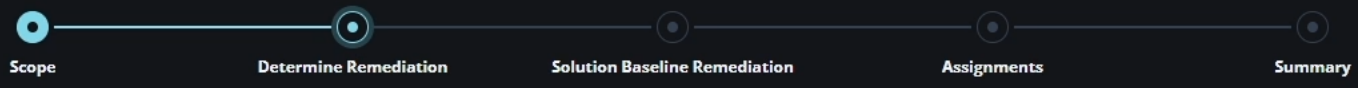
manager for msp

- ALL FEATURES
- ACCOUNTS
- INSIGHTS
- GLOBAL VIEWS
- BASELINES**
- POLICIES
- APPLICATIONS
- SCRIPTING
- SHARED SETTINGS
- NOTIFICATIONS
- TOOLS
- SYSTEM

Remediation Wizard

Baselines > Assessments > Remediation Wizard

New UI



	CA011: No persistent browser session ID: c2dbfef8-f0ee-4c60-9256-20f...	↔	CA001: Require multi-factor authentication for admins	Contoso Ltd	View Conflicts	High Impact	Split Policy			
	CA014: Use application enforced restrictions for unmanaged devices ID: b4606e73-a558-4304-a78d-8...	↔	CA001: Require multi-factor authentication for admins	Contoso Ltd	View Conflicts	High Impact	Split Policy			
	AMOL-LAB1 ID: 0c230e0e-9923-438d-b979-0...	↔	CA001: Require multi-factor authentication for admins	Contoso Ltd	View Conflicts	High Impact	Split Policy			
	CA001: Require multi-factor authentication for admins_edited ID: 85b1c5a1-8b45-4bda-a5c5-9...	↔	CA001: Require multi-factor authentication for admins	Contoso Ltd	View Conflicts	High Impact	Split Policy			
	CA014: Use application enforced restrictions for unmanaged devices ID: 3c4ba336-750d-4110-b41c-9...	↔	CA001: Require multi-factor authentication for admins	Contoso Ltd	View Conflicts	High Impact	Split Policy			
	CA - Role Test MSP Tenant ID: 93da0d9b-f6d8-4083-8e13-8...	↔	CA001: Require multi-factor authentication for admins	Contoso Ltd	View Conflicts	High Impact	Split Policy			

⚠ If no action is selected, then the 'Leave As-Is' action will be applied.



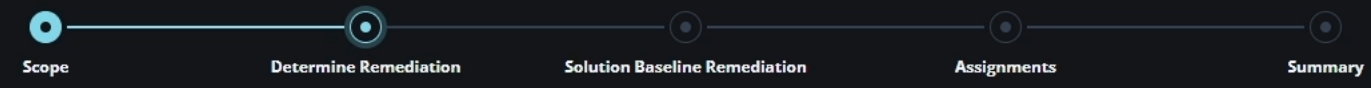


Remediation Wizard

- ALL FEATURES
- ACCOUNTS
- INSIGHTS
- GLOBAL VIEWS
- BASELINES**
- POLICIES
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- NOTIFICATIONS
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- SYSTEM

Baselines > Assessments > Remediation Wizard

New UI



	CA011: No persistent browser session ID: c2dbfef8-f0ee-4c60-9256-20f...	↔	CA001: Require multi-factor authentication for admins	Contoso Ltd	View Conflicts	High Impact	Split Policy			
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	CA - Role Test MSP Tenant ID: 93da0d9b-f6d8-4083-8e13-8...	↔	CA001: Require multi-factor authentication for admins	Contoso Ltd	View Conflicts	High Impact	Split Policy			

Split Policy is only available for Configuration Profiles

If no action is selected, then the 'Leave As-Is' action will be applied.

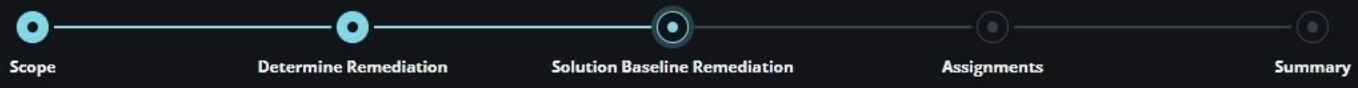


- manager for msp
- ALL FEATURES
- ACCOUNTS
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- SYSTEM

Remediation Wizard

Baselines > Assessments > Remediation Wizard

New UI



Solution Baseline Remediation

Solution Baseline for Defender for Endpoint Not Assigned Solution Baseline for Intune - Silver Tier Not Assigned Solution Baseline for Defender for Endpoint - CIS L1 Not Assigned

Setting	Customer	Solution Baseline	Result	Actual State	Desired State	Actions
Prerequisites	Contoso Ltd	Solution Baseline for Defender for Endpoint	Valid	Passed	Passed	
Allow Defender to manage endpoint security configurations	Contoso Ltd	Solution Baseline for Defender for Endpoint	Mismatch	Disabled	Enabled	
Enable device diagnostics	Contoso Ltd	Solution Baseline for Defender for Endpoint	Valid	Disabled	Disabled	
Let Defender evaluate device risk	Contoso Ltd	Solution Baseline for Defender for Endpoint	Valid	Options: Windows	Options: Windows	
Allow sharing of device information	Contoso Ltd	Solution Baseline for Defender for Endpoint	Excluded	-	-	

Previous 1 2 3 4 ... 7 Next Showing 10 of 64 Page Size: 10

Back Next Step



- manager for msp
- ALL FEATURES
- ACCOUNTS
- INSIGHTS
- GLOBAL VIEWS
- BASELINES
- POLICIES
- APPLICATIONS
- SCRIPTING
- SHARED SETTINGS
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Remediation Wizard

Baselines > Assessments > Remediation Wizard

New UI



Solution Baseline Remediation

Solution Baseline for Defender for Endpoint Contoso Ltd	Not Assigned	Solution Baseline for Intune - Silver Tier Contoso Ltd	Not Assigned	Solution Baseline for Defender for Endpoint - CIS L1 Contoso Ltd	Not Assigned
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Change Assignment Mode

To accept the drift, the baseline must be assigned. Choose an assignment mode: • Report Only — the accepted drift will be applied to this setting only. • Enforced — the accepted drift will be applied to this setting and all other drifted settings will be set to Fix Drift.

Set to Report Only
Cancel
Set to Enforced

Setting	Customer	Baseline	Assignment Mode	Options	Desired State	Actions
Prerequisites	Contoso Ltd				Passed	
Allow Defender to manage endpoint security configurations	Contoso Ltd				Enabled	
Enable device diagnostics	Contoso Ltd				Disabled	
Let Defender evaluate device risk	Contoso Ltd	Solution Baseline for Defender for Endpoint	Valid	Options: Windows	Options: Windows	
Allow sharing of device information	Contoso Ltd	Solution Baseline for Defender for Endpoint	Excluded	-	-	

Policy lifecycle improvements

- Replace and merge modes for direct assignment
- Conditional Access policies: Guest and external users, user roles
- Preserve assignments

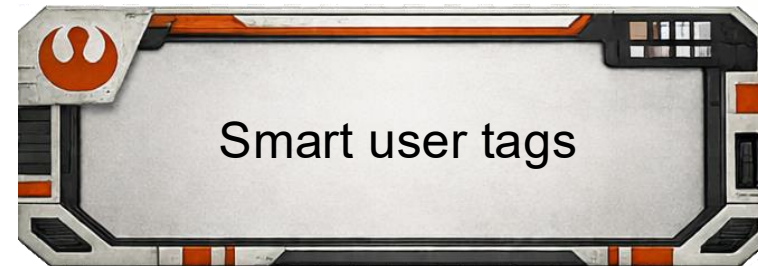
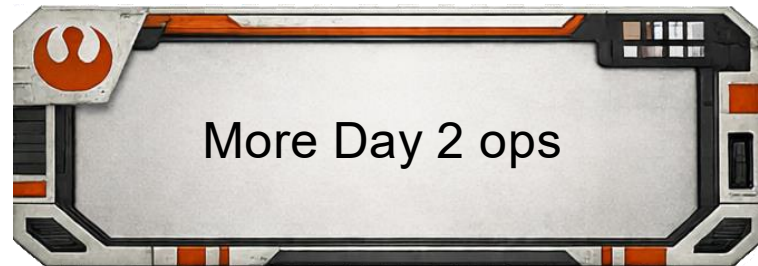
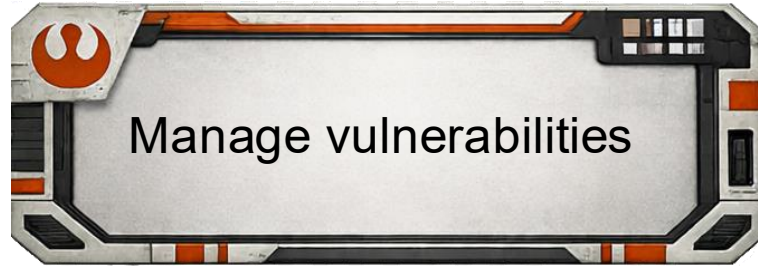
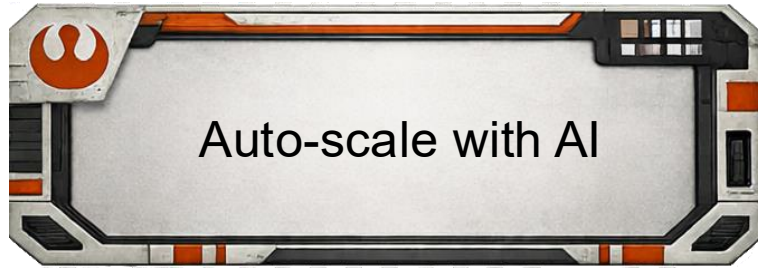
AVD Hybrid

“Customers want the flexibility to create a virtualization environment that maximizes the value of their existing infrastructure while providing a clear migration path to the cloud.” - Scott Manchester

AVD Hybrid

- Azure Arc bridges the gap from on-premises to Azure
- Microsoft now supports hybrid AVD in collaboration with Nerdio's partner support
- AVD with data sovereignty
- Simplify legacy VDI complexity without leaving existing on-premises infrastructure
- Encapsulate it all through Nerdio Manager for MSP's management

EPISODE II: Eliminate work



Auto-scale with AI Recommendations

- Auto-scale has become a “set and forget” approach.
- MSPs need a means to assess auto-scale regularly to maintain or improve margins.
- AI models will analyze user behavior and resource needs to recommend auto-scale changes.
- Expanded functionality to include Reserved Instance suggestions.
- AI model deployed via Azure Foundry.

Auto-scale with AI Recommendations (prototype)

High Impact **Reduce Pre-Stage Host Count** Monthly Savings **\$280**

Your current pre-stage of 6 hosts at 7:30 AM is excessive. Analysis shows peak login velocity occurs at 8:15 AM with only 18-22 concurrent users.

CURRENT CONFIGURATION	AI RECOMMENDATION
Pre-stage: 6 hosts at 7:30 AM	Pre-stage: 3 hosts at 8:00 AM

AI Rationale: Based on 30-day login patterns, 3 pre-staged hosts can handle the morning ramp-up. Users login gradually between 8:00-8:30 AM, not all at once.

[Apply This Change](#) [Save as Profile](#) [Dismiss](#)

High Impact **Optimize Base Capacity** Monthly Savings **\$170**

Base capacity of 4 hosts keeps resources running 24/7. Your off-hours usage averages only 2-4 users.

CURRENT CONFIGURATION	AI RECOMMENDATION
Base Capacity: 4 hosts	Base Capacity: 1 host

AI Rationale: User-driven scaling can handle off-hours demand. One base host ensures availability while minimizing waste.

[Apply This Change](#) [Save as Profile](#) [Dismiss](#)

Medium Impact **Adjust Scale-In Delay** Monthly Savings **\$95**

Current 2-hour scale-in delay prevents hosts from shutting down efficiently after morning peak.

CURRENT CONFIGURATION	AI RECOMMENDATION
Scale-In Delay: 2 hours	Scale-In Delay: 45 minutes

AI Rationale: Session patterns show stable utilization by 9:30 AM. A 45-minute delay provides buffer without excessive idle capacity.

[Apply This Change](#) [Save as Profile](#) [Dismiss](#)

User Flows

- manager for msp
- ALL FEATURES
- ACCOUNTS
- INSIGHTS
- GLOBAL VIEWS
- BASELINES
- POLICIES
- APPLICATIONS
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- NOTIFICATIONS
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- SYSTEM

Accounts

Accounts

Accounts
 Accounts Tasks ✓ 11

Search
 Columns
 Filters

New UI

Name	Status	Azure Info	Configuration Info	Usage	Actions
Contoso Ltd ID: 29	ACTIVE	Azure tenant: andrewweidner.onmicrosoft.com Subscription: - Azure region(s): - App Registration: a05ce666-fe24-4819-b4b4-c8b571f9d5eb	Default Identity: Entra ID	Current Modern Work users: 2 IUL: No Last usage: Apr 28, 2026 10:10 AM	
Northwind Traders ID: 21	ACTIVE	Azure tenant: nerdioandy.onmicrosoft.com Subscription: - Azure region(s): - App Registration: d51da898-bfb9-4e51-b353-4605e8763f08	Default Identity: Entra ID	Current Modern Work users: 1 IUL: Yes Used for Intune & Cloud PC billing Last usage: Apr 13, 2026 12:19 PM	
School of Fine Art ID: 23	ACTIVE	Azure tenant: nerdioandy.onmicrosoft.com Subscription(s): Azure subscription 1 (8e0f01ae-0be4-487f-9e53-91... Azure region(s): centralus App Registration: 6a27ec79-2074-4351-b1f2-f8c9a417367f	Default Identity: Active Directory	Current AVD users: 1 Current Modern Work users: 0 Host Pools: 1 / CPU cores: 0 / IUL: No Last usage: Apr 15, 2026 08:03 AM	

Previous 1 Next
 Showing 3 of 3 Page Size: 10

Refresh All

 New Account



manager for msp

Northwind Traders

ALL FEATURES

INSIGHTS

ENTRA

CLOUD DESKTOPS

ENDPOINTS

POLICIES

APPLICATIONS

SCRIPTING

FINOPS

SETTINGS

Users

Entr > Entr > Users

This page cannot load all required information because some of the features are not enabled. Check [User Management section](#) to enable Risky Users, Sign In Activity.

USERS	SEARCH users...	Filter	As of May 1, 2026 05:37:09 PM				
USER	MICROSOFT 365	ATTRIBUTES	DESKTOP/APP EXPERIENCE	ENTRA ID ROLES	RISK STATE	MFA REGISTERED	
Boba Fett bfett@nerdioandy.com						No	Properties
Chewy chewy@nerdioandy.com						No	Properties
dipesh-gurwani-test3 dipesh-gurwani-test3@nerdioandy.onmicrosoft.com						No	Properties
Domain Administrator domainjoin@nerdioandy.onmicrosoft.com						No	Properties
George Malec gmalec@nerdioandy.onmicrosoft.com				Global Administrator		Yes	Properties
Hybrid User Test HybridUserTest@nerdioandy.onmicrosoft.com						No	Properties
Jar Jar Binks jjbinks@nerdioandy.com 555-123-6754						No	Properties
Lord Vader darth@nerdioandy.com 555-123-4567						No	Properties

manager for msp

Northwind Traders

ALL FEATURES

INSIGHTS

ENTRA

CLOUD DESKTOPS

ENDPOINTS

POLICIES

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Users

Entr > Entr > Users

This page cannot load all required information because some of the features are not enabled. Check [User Management section](#) to enable Risky Users, Sign In Activity.

USERS	SEARCH	FILTER	DATE				
USER	MICROSOFT 365	ATTRIBUTES	DESKTOP/APP EXPERIENCE	ENTRA ID ROLES	RISK STATE	MFA REGISTERED	
Boba Fett bfett@nerdioandy.com						No	Properties
Chewy chewy@nerdioandy.com						No	Properties
dipesh-gurwani-test3 dipesh-gurwani-test3@nerdioandy.onmicrosoft.com						No	Properties
Domain Administrator domainjoin@nerdioandy.onmicrosoft.com						No	Properties
George Malec gmalec@nerdioandy.onmicrosoft.com				Global Administrator		Yes	Properties
Hybrid User Test HybridUserTest@nerdioandy.onmicrosoft.com						No	Properties
Jar Jar Binks jjbinks@nerdioandy.com 555-123-6754						No	Properties
Lord Vader darth@nerdioandy.com 555-123-4567						No	Properties

- manager for msp
- ALL FEATURES
- ACCOUNTS
- INSIGHTS
- GLOBAL VIEWS
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Accounts

Accounts

Accounts
 Accounts Tasks ✓ 11

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New UI

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School of Fine Art ID: 23	ACTIVE	Azure tenant: nerdioandy.onmicrosoft.com Subscription(s): Azure subscription 1 (8e0f01ae-0be4-487f-9e53-91... Azure region(s): centralus App Registration: 6a27ec79-2074-4351-b1f2-f8c9a417367f	Default Identity: Active Directory	Current AVD users: 1 Current Modern Work users: 0 Host Pools: 1 / CPU cores: 0 / IUL: No Last usage: Apr 15, 2026 08:03 AM	

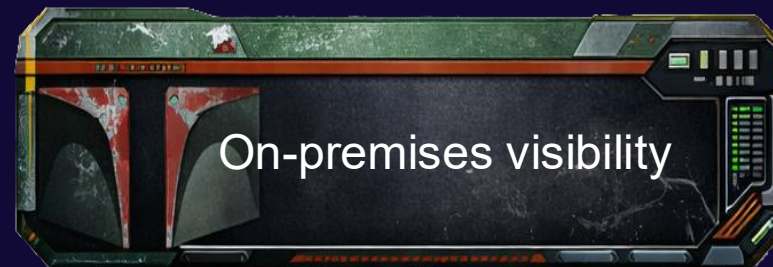
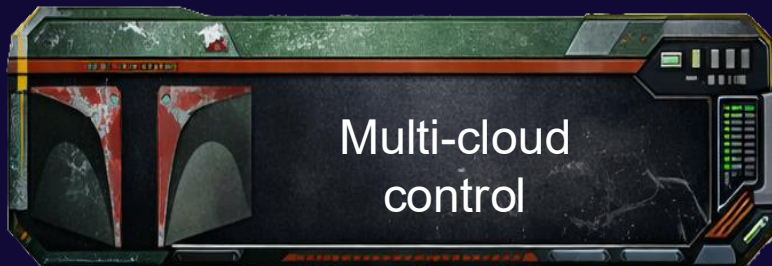
Previous 1 Next
 Showing 3 of 3 Page Size: 10

Refresh All

 New Account



EPISODE III: Increase Visibility



Reporting

- Unmanaged tenant reporting
- Account-level reporting engine
- MSP multi-tenant reports
- Theme builder

Financial operations (FinOps)



Alerts & notifications

Proactive thresholds on Azure spend and Microsoft 365 license consumption, delivered via Notifications or Nerdio pop-ups



Spend visibility

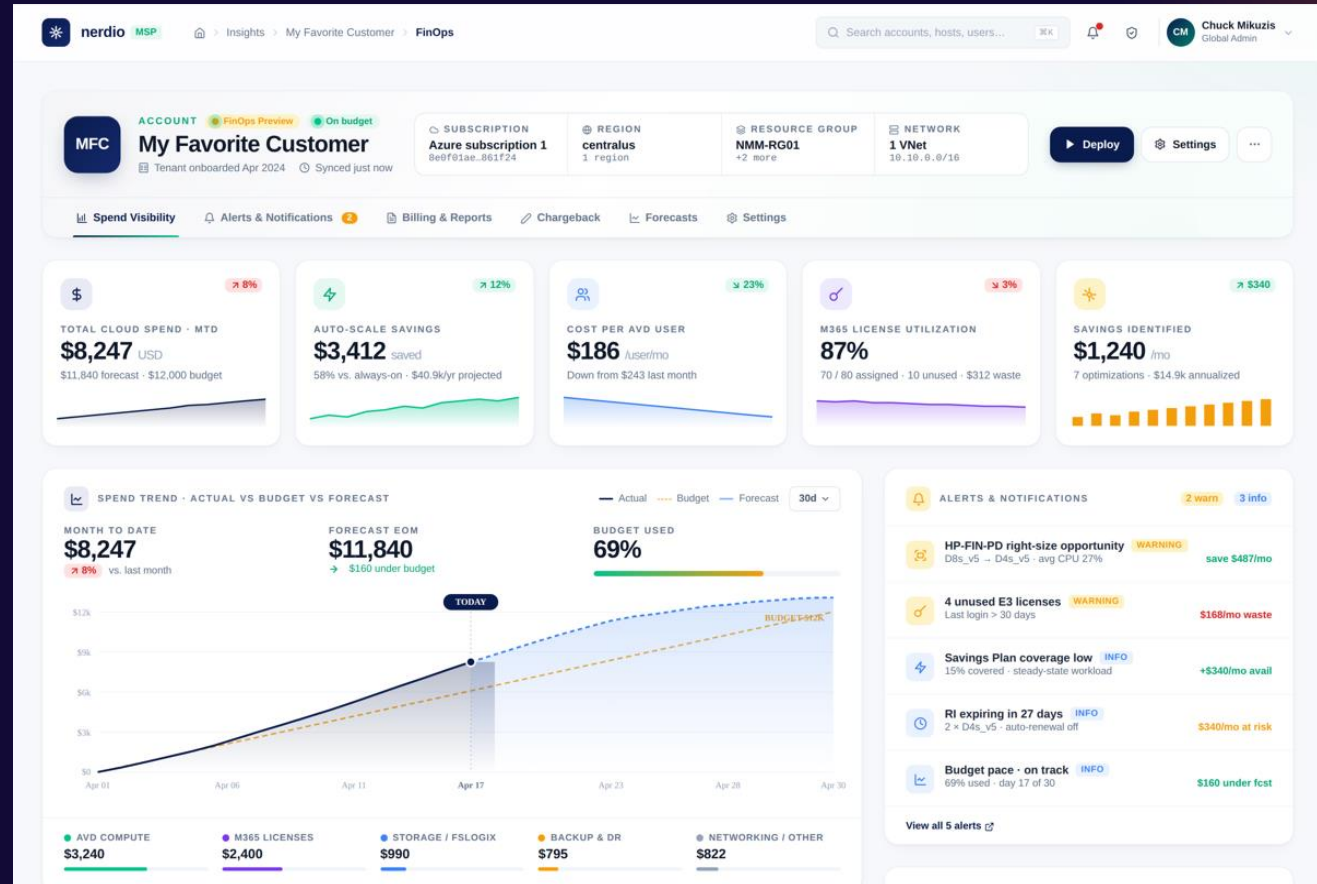
Unified FinOps dashboard showing per-account, per-service, and per-user cost trends across all MSP customers



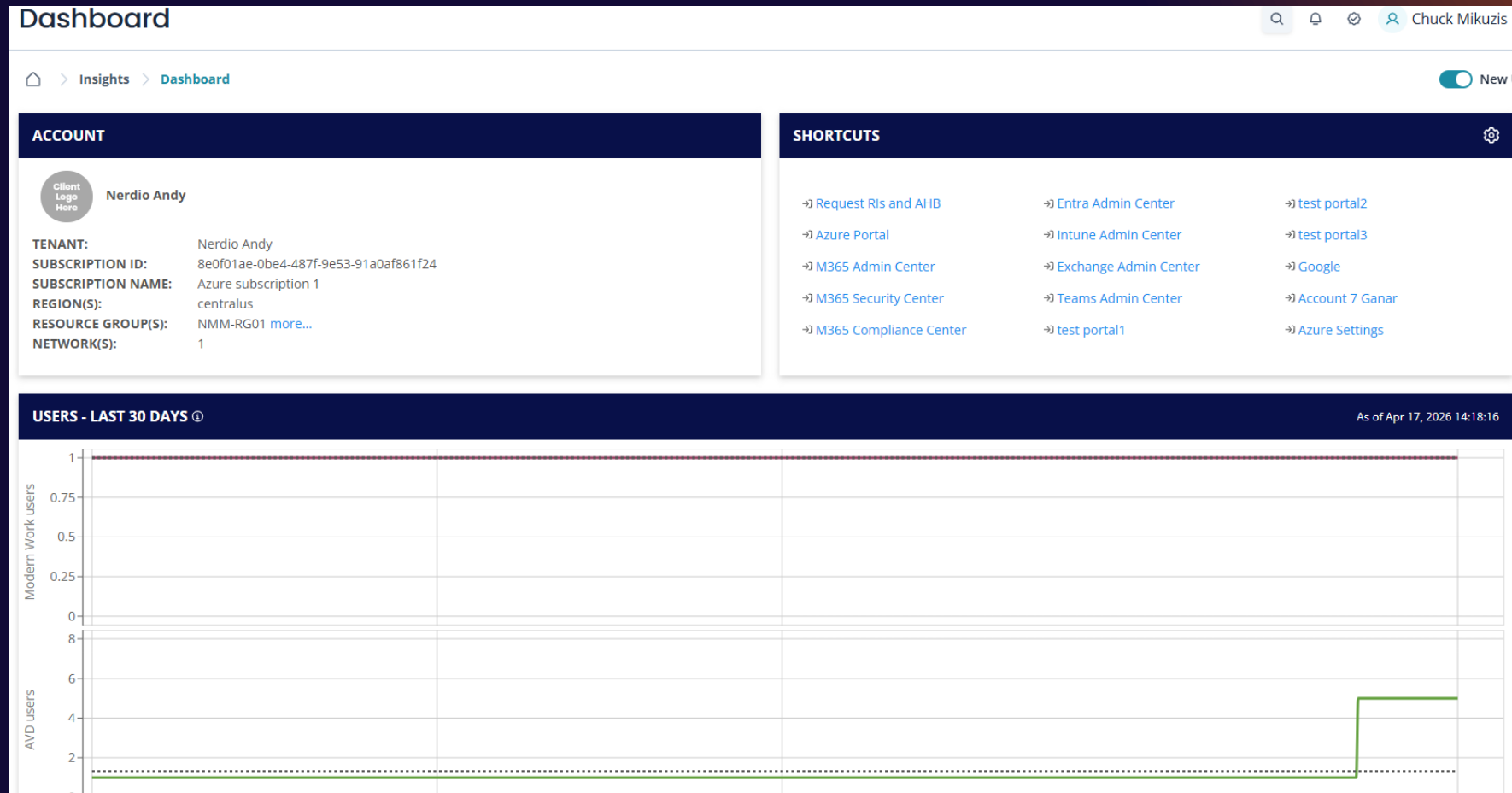
Billing & cost reports

Redesigned invoice and chargeback reports with exportable, customer-ready PDF and CSV outputs

Financial operations (FinOps)



Home screen dashboard

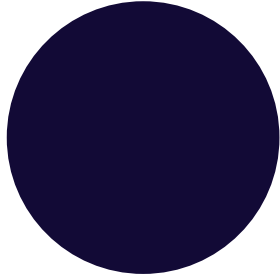


On-premises and multi-cloud visibility

- Azure Arc leveraged for management via Nerdio Manager for MSP
- Custom script extensions supported (Scripted Actions/UAM)
- Azure Update Manager enablement (~\$5/server/month)
- Azure Monitor Analytics supported (dashboards, anyone?)
- Console Connect support

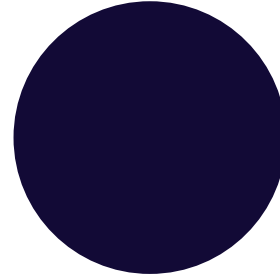
EPISODE IV: Intelligent future





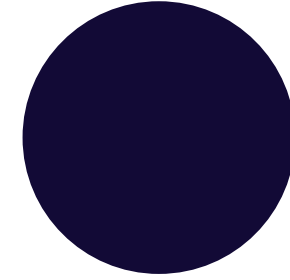
Tenant assessment + action plan

Built-in report from reporting engine, ready to go



Posture management

Pre-canned policies and baseline specifically crafted to manage Copilot risk areas



Maintenance

Ensure your posture doesn't change with our existing Policy and Solution Baseline engine monitoring for drift and regularly scheduled readiness reports

Agent governance with Agent 365*

- User-facing agents, aka personal/interactive agents
- Agents that **sit in front of a human** and help them think, create, and act.
 - Microsoft 365 Copilot
 - Claude (chat, cowork, dispatch)
 - ChatGPT
 - Human in the loop
 - Conversational
 - Context in session awareness
 - Reactive
 - UI-frontend
- System/autonomous agents, aka programmatic agents
- Agents that run in the background and execute tasks across systems
 - Copilot Studio
 - Azure AI Foundry
 - API key-based Agents via Claude/OpenAI
 - No UI required
 - Trigger-based (event, scheduled, API call)
 - Multi-step workflows
 - System-to-system actions
 - Perhaps autonomous

Agent governance

- Discover Shadow AI
- Advance Detections
- Visibility Across All Tenants
- Integration with Microsoft 365 Business Premium

AI Governance

Shadow AI Detected - 23 users are using non-sanctioned AI tools across 6 tenants. ChatGPT, Claude, and Perplexity detected via API traffic & working folder scan.

USERS W/ AI TOOLS: 47 (across all tenants)

SHADOW AI USERS: 23 (49% unsanctioned)

TOTAL SEAT COST - MO: \$1,840 (known subscriptions only)

REDUNDANT SEATS: 12 (overlapping chat tools)

WASTED SPEND - MO: \$340 (duplicate subscriptions)

User Discovery: 47 | Shadow AI: 23 | Working Folders: 31 | Blocking Controls

USER	AI TOOLS DETECTED	WORKING FOLDERS	SUBSCRIPTION & TIER	LAST SEEN
MC Maria Chen schen@anarharc.com	M365 Copilot, Claude	2 folders	Copilot (M365 Copilot \$30/mo), Claude (Pro or Team \$20/mo), overlapping seats	2 min ago
DP David Park dpark@anarharc.com	ChatGPT, Claude, Perplexity	3 folders	ChatGPT (Plus or Team \$20/mo), Claude (Pro or Team \$20/mo), Perplexity (Pro \$20/mo), overlapping seats	8 min ago
PS Priya Sharma psharma@nerdioccl.onmicrosoft.com	M365 Copilot	—	Copilot (M365 Copilot \$30/mo)	15 min ago
LS Lauren Scott lscott@northwindlegal.com	Claude, ChatGPT	4 folders	Claude (Pro or Team \$20/mo), ChatGPT (Plus or Team \$20/mo), overlapping seats	1 hr ago
JW James Wu jwu@contosofin.com	ChatGPT, Perplexity	1 folder	ChatGPT (Plus or Team \$20/mo), Perplexity (Pro \$20/mo)	5 min ago
DA Dr. Alice Moreno amoreno@fabrikamhealth.org	Claude	2 folders	Claude (Pro or Team \$20/mo)	2 hr ago
SO Sam O'Neill so111@nerdioccl.onmicrosoft.com	Claude, Cursor, OpenRouter	5 folders	Claude (Pro or Team \$20/mo), Cursor (Pro \$20/mo)	3 min ago

Agent governance

- Infer Free vs Paid plans
- Discovery of Working Folders where AI Agents live
- Block URLs for Web and API traffic
- Entra User Attribution
- Block and Uninstall

The screenshot displays the 'AI Governance' dashboard for user David Park. The interface includes a sidebar with navigation options like 'ALL FEATURES', 'ACCOUNTS', 'INSIGHTS', 'GLOBAL VIEWS', 'BASELINES', 'POLICIES', 'APPLICATIONS', 'SCRIPTING', 'SHARED SETTINGS', 'NOTIFICATIONS', 'TOOLS', and 'SYSTEM'. The main content area is titled 'AI Governance' and shows the user's profile with a 'SHADOW AI' badge. Key sections include:

- Detected AI Tools & Seat Cost:** Lists tools like ChatGPT, Claude, and Perplexity with their respective costs (\$20/mo) and detection methods. A warning for 'Overlapping chat seats' is also present.
- Working Folders:** Shows detected folders such as 'C:\Users\dpark\Documents\finance-agent' and 'c:\claude.md .env' with a 'Block' action button.
- Tier Confidence Legend:** Explains the confidence levels for detected tools: confirmed, inferred, and unknown.
- Entra Attribution:** Provides details like the Entra Object ID, detected tools, and last sync time.
- Recommended Actions:** Offers options to 'Block via Defender URL Policy', 'Remove working folder permissions via LOCAL SYSTEM', and 'Assign sanctioned agent from library'.

Agent governance

- Infer Free vs Paid plans
- Discovery of Work Folders where AI Agents live
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The screenshot displays the 'AI Governance' dashboard for user David Park. The interface includes a sidebar with navigation options like 'ALL FEATURES', 'ACCOUNTS', 'INSIGHTS', 'GLOBAL VIEWS', 'BASELINES', 'POLICIES', 'APPLICATIONS', 'SCRIPTING', 'SHARED SETTINGS', 'NOTIFICATIONS', 'TOOLS', and 'SYSTEM'. The main content area is titled 'AI Governance' and shows the user's profile with a 'SHADOW AI' badge. Below this, there are several sections: 'Detected AI Tools & Seat Cost' listing ChatGPT, Claude, and Perplexity; 'Working Folders' showing file paths like 'C:\Users\dpark\Documents\finance-agent'; 'Entra Attribution' with details on object ID, detected tools, and last sync time; and 'Recommended Actions' such as 'Block via Defender URL Policy' and 'Remove working folder permissions via LOCAL SYSTEM'. A 'Block & Uninstall' tooltip is visible over the Perplexity tool entry.

Connect with the Product Team

We'd love to have interviews
with you!

nerdio.co/nmm-pdi



Please remember to fill out the post-breakout survey

NERDIOCON'26

Thank you

Please remember to fill out the post-breakout survey in the app.

Stop by the **Nerdio booth in the Expo Hall** to take advantage of our exclusive, lowest-ever pricing on Microsoft 365 management!

PLACEHOLDER FOR SURVEY