

NERDIOCON'26

# Empowering your help desk with Nerdio Manager for MSP

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# Agenda

1. A long time ago...(Intro)
2. Prepping your **Stormtrooper Operating Procedure (SOP)**
3. Attack of the clones: Common day-to-day operations
4. Rogue one: Improved aim at less common targets
5. Q&A



## Chuck Mikuzis

Product Manager, Nerdio  
Manager for MSP

AVD and Azure infrastructure

# Prepping your Stormtrooper operating procedure (SOP)

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Even in a galaxy of chaos, your  
empire needs some standards.

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# RBAC roles for help desk

	MSP Level									Customer level
	Accounts	Global Images & Scripted Actions	CE	Users & Roles	Notifications	Billing	Logs	Settings	Updates	Modules
<b>Super Admin</b>	Full access	Full access	Full access	Full access	Full access	Full access	Full access	Full access	Full access	Full access
<b>MSP Admin</b>	Select accounts & Read-only	No	Full access	Read-only	Read-only	No	Select accounts	Read-only	No	Full access
<b>MSP IT Admin</b>	Select accounts & Read-only	No	No	No	No	No	Select accounts	No	No	All screens except Users, Groups, User sessions, Monitoring, Reports
<b>MSP Help Desk</b>	Select accounts & Read-only	No	No	No	No	No	Select accounts	No	No	Home, Users, Groups, User sessions, Monitoring, Reports
<b>MSP Billing Admin</b>	Read-only	No	Full access	No	No	Full access	Read-only	No	No	None
<b>MSP Sales</b>	Read-only	Read-only	Full access	Read-only, hide guest users	Read-only	Read-only	Read-only	Read-only	Read-only	Read-only
<b>Account Admin</b>	-	-	-	-	-	-	-	-	-	Full access
<b>Account Help Desk</b>	-	-	-	-	-	-	-	-	-	Home, Users, Groups, User sessions, Monitoring, Reports
<b>End-user</b>	-	-	-	-	-	-	-	-	-	Desktop management

# RBAC roles for help desk

System > RBAC > RBAC Definitions > Add New UI

Name\* ⓘ

Description\* ⓘ

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**Allowed permissions** ✔ Select All ✖ Unselect All

- \*.\*.\*
- ▼ Accounts (0/298)
  - Accounts.\*.\*
  - Accounts.\*.Page
  - Accounts.\*.Read
  - > AdminUsers (0/5)
  - > AppAttachImages (0/6)
  - > AppGroups (0/6)
  - > AppRepositories (0/5)
  - > AvdAssignments (0/4)
  - > AvdAutoscaleHistory (0/3)

**Denied permissions** ✔ Select All ✖ Unselect All

- \*.\*.\*
- ▼ Accounts (1/298)
  - Accounts.\*.\*
  - Accounts.\*.Page
  - Accounts.\*.Read
  - > AdminUsers (0/5)
  - > AppAttachImages (0/6)
  - > AppGroups (0/6)
  - > AppRepositories (0/5)
  - > AvdAssignments (0/4)
  - > AvdAutoscaleHistory (0/3)

# Prevent help desk technicians from making unauthorized changes—route sensitive actions through an approval chain before execution



## Configurable per action type

Define which operations require manager's sign-off vs. self-service.

## Email notifications

Approvers receive instant alerts; requestors get confirmation on resolution.

## Audit trail

Every request, approval, and denial is logged for compliance.

## Scope-aware

Approvals can be configured per client/tenant for granular control.

Prevent help desk technicians from making unauthorized changes—route sensitive actions through an approval chain before execution.

# Approval workflows in only 2 steps!

### Add Task Category

**Name** ⓘ

**Description** ⓘ   
35/200

**Level** ⓘ

**Task** ⓘ

### Add Approval Rule

**Name** ⓘ

**Description** ⓘ   
38/200

**Level** ⓘ

**Task Categories** ⓘ

**Submitters** ⓘ

**Approvers** ⓘ

**Accounts** ⓘ

# Approval workflows—get notified!

This is an automated alert notification from Nerdio Manager for MSP

**User:** [lkimball@TechSolMSP1.onmicrosoft.com](mailto:lkimball@TechSolMSP1.onmicrosoft.com)

**Task:** Start session host

**Resource:** MS-129324-Tst

Please login to your [Nerdio Manager for MSP](#) install to Approve or Deny this request.

# Schedule and execute complete user offboarding workflows from Nerdio—automatically handling AVD, Azure, and M365 cleanup steps in the correct sequence.

## Scheduled execution

Set offboarding to trigger at a future date/time—perfect for planned departures. The workflow executes automatically at the scheduled moment, even outside business hours.

## Immediate execution

Execute the offboarding workflow immediately for emergency or surprise departures—all steps fire in the correct order with real-time status feedback.

## What the offboarding workflow handles:

- Disable and block the Azure AD/AD account sign-in.
- Remove user from AVD host pool and application groups.
- Revoke active AVD sessions and sign out the user.
- Detach and optionally cleanup FSLogix profile container.
- Remove M365 license assignments to free up license costs.
- Send email notifications to stakeholders via configured templates.

# Configure pre-built email notification templates that automatically fire when offboarding user flow execute—communicate to stakeholders at lightspeed

## Email notification preview

**To:** manager@mspcorp.com

**Subject:** User Offboarding Complete—{UserName}

The offboarding workflow for {UserName} has completed.

- AVD Session removed
- Host pool deallocation complete
- Storage accounts detached
- AD account disabled

Completed: {DateTime}

### Fully customizable

Edit HTML/text templates with dynamic token substitution like {UserName}, {DateTime}, {TenantName}.

### Multi-recipient

Notify managers, security teams, IT admins—or any stakeholder group simultaneously.

### Workflow-triggered

Templates fire automatically at defined workflow stages—no manual steps needed.

### Compliance ready

Creates a documented evidence trail for regulatory or audit requirements.

## Update Existing User Flow

Name ⓘ

Galactic Empire Plumbing

Type ⓘ

Offboard




Assignments ⓘ

(278) Galactic Empire Plumbing ×

× | ▾

Execution Timezone ⓘ

(UTC-08:00) Baja California

Execution Time	Actions ⓘ	Action Options
Before	<p>⋮ Hide from GAL (at 12:00 AM) </p>	Select an action to configure its options
<b>During</b> >	<p>⋮ Remove FSLogix profile (at 12:00 AM) </p>	
After	<p>⋮ Wipe devices (at 12:00 AM) </p>	
	<p>⋮ Disable user account (at 12:00 AM) </p>	






## Update Existing User Flow

**Name** ⓘ

**Type** ⓘ

**Assignments** ⓘ

**Execution Timezone** ⓘ

Execution Time	Actions ⓘ	Action Options
Before	<ul style="list-style-type: none"><li>Send email message (1 day after, at 12:00 AM)  </li></ul>	<p><b>Days offset</b> ⓘ <input type="text" value="1"/></p>
During	<ul style="list-style-type: none"><li>Set out of office message (1 day after, at 12:00 AM) </li></ul>	<p><b>Execution time</b> <input type="text" value="00:00"/></p>
After	<p> <b>Add Action</b> </p>	<p><b>Email template</b> ⓘ MANAGER — ACCOUNT DELETION CONFIRMATION</p> <p><b>Send to user</b> ⓘ <input type="checkbox"/></p>

# Attack of the clones: Common day-to-day ops

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Sith Happens IT and Galactic Empire  
Plumbing: an MSP case study in a galaxy far,  
far away.

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# Nerdio's Global Search lets technicians instantly find any resource across all clients without digging through menus

Search users, hosts, storage, VMs, clients...

## Users

Find any user across all AVD tenants by name, UPN, or email.

## Session hosts

Locate VMs by name, pool, or client —jump to management instantly

## Host pools

Navigate to any pool config across your entire MSP client base.

## Storage accounts

Search for FSLogix shares.

## Client tenants

Jump to any MSP-managed tenant dashboard without menu hunting.

# Nerdio gives technicians one place to reset passwords, clear MFA, and manage Active Directory objects

## Password reset

- Reset AD/Azure AD passwords for any user.
- Enforce change at next login toggle.
- Works across all MSP-managed tenants.
- RBAC-scoped—techs only see their clients.

## MFA reset

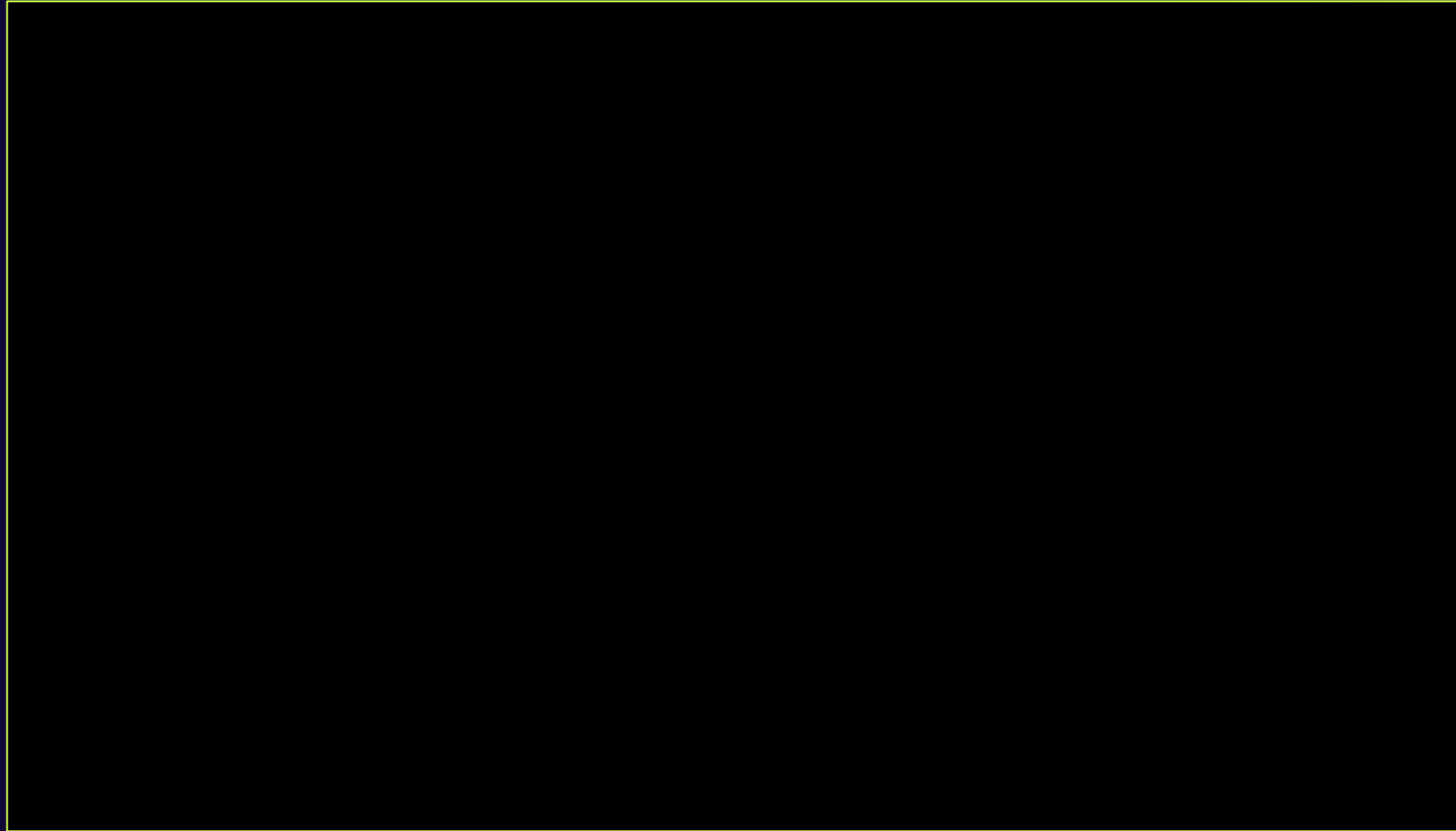
- Clear TOTP/Authenticator registrations.
- Unblock locked-out MFA users.
- Force re-enrollment on next login.

## AD DS object & user management

Manage your Active Directory Domain Services objects directly from the Nerdio portal—no RDP to a DC needed:

- Enable/disable AD user accounts.
- Unlock AD accounts.
- Modify user attributes and group memberships.
- Reset passwords directly via AD connector.
- Search and browse AD objects.
- View user properties and last logon info.

# Global Search and password/MFA reset



# Nerdio's AVD Insights module gives help desk teams a simple dashboard with the information they need without requiring Azure Monitor expertise.

## User RTT times

Monitor round-trip time latency per user session—identify poor experience before users complain.

## Session host performance

CPU, RAM, per VM—spot overloaded hosts and bottlenecks.

## User session overview

Active, disconnected, idle sessions at a glance across all host pools and clients.

## Azure Files usage

View file share usage, large profile discovery, unused profile charting.

## Historical trend analysis

Review performance trends over time to tune auto-scaling and capacity plans.

# AVD Insights dashboards



# Console Connect lets help desk technicians access endpoints and shadow user sessions directly in the Nerdio portal with no extra tools or VPNs

## Console Connect to VMs and endpoints

- Direct console access to session host VMs
- Bypass need for full RDP admin access
- Useful for device-level (physical or VM) troubleshooting without logging in as admin
- Accessible directly from Nerdio
- RBAC-scoped—techs see only their assigned clients

## Shadow user sessions

- View a live user's desktop session in real time
- Provide live visual support without taking over the session
- Identify application errors and performance issues as the user sees them
- Initiate from the user session management panel
- Requires appropriate RBAC permissions configured

# Console Connect



**Rogue one:  
Improved aim at less  
common targets**

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# Nerdio lets help desk technicians manage Exchange Online mailboxes without using the M365 Admin Center

## Mailbox management

Configure mailbox settings, aliases, out-of-office, and mailbox permissions for users.

## Shared mailboxes

Create, modify, and assign shared mailboxes for departments and teams.

## Distribution groups

Add/remove users from distribution lists and mail-enabled security groups.

## Delegate access

Grant Send As, Send on Behalf, or Full Access delegation between mailboxes.

## Mailbox archiving

Enable and configure Exchange Online archive mailboxes for compliance.

# Provision new users from Nerdio in one guided workflow, including account creation, host pool assignment, Azure Files access, and permissions



# Dynamic groups define user access. Nerdio lets technicians view and update them without using the Azure Portal.

Dynamic groups use rule-based membership—e.g. 'all users in Department=Finance'—eliminating manual group management. Nerdio surfaces these so help desk teams can understand and adjust membership rules without Azure Portal access.

## View group rules

See the current dynamic membership rule syntax for any Azure AD group in plain language.

## Edit membership rules

Modify rule expressions to add/remove departments, job titles, locations, or custom attributes.

## Host pool assignments

Understand and update which groups are assigned to which AVD host pools and app groups.

## Sync & verify

Trigger group membership recalculation and verify target users appear correctly post-change.

# Run Intune actions, such as wipe, retire, and compliance checks, from the Nerdio portal without Intune admin access

## Full device wipe

Factory reset the device—removes ALL data, apps, and configuration. Used for lost/stolen devices or employee departures requiring complete data sanitization.

## Retire (selective wipe)

Remove corporate data and apps while preserving personal data. Ideal for BYOD offboarding—removes M365 apps, email profiles, and MDM enrollment.

## Remote lock

Lock the device immediately—prevents access until unlocked. Essential when a device is suspected lost or the user account is compromised.

## Sync & compliance check

Force the device to check in with Intune and re-evaluate its compliance state—useful for policy enforcement and resolving conditional access blocks.

# Retrieve BitLocker recovery keys and LAPS credentials directly from the Nerdio portal without searching through Azure AD or Intune

## BitLocker key retrieval

- Retrieve the 48-digit BitLocker recovery key for any enrolled device
- Useful when users are locked out of their encrypted drive
- Searches by device name or user—fast for help desk workflows
- Keys sourced from Azure AD/Intune BitLocker storage
- Full audit trail of key retrievals for compliance
- RBAC-gated—only authorized roles can retrieve keys

## LAPS password retrieval


- Fetch the current Local Admin Password Solution credential for any device
- Essential for local admin access when domain connectivity fails
- Passwords auto-rotate per configured schedule—always current
- Sourced from Azure AD LAPS or Windows LAPS policies
- Access logs maintained for security and accountability
- Scoped to authorized technicians per RBAC configuration

- Overview
- Details
- Configuration Profiles
- Compliance Policies
- Other Policies
- Updates
- Applications
- Scripts
- User Experience
- Defender




Recovery

**Bitlocker**

KEY ID	RECOVERY KEY	DRIVE TYPE
Recovery keys not found		

Rotate keys 

**Local Admin Password**

ACCOUNT NAME	PASSWORD	BACKUP DATE
DefaultAdmin	***** 	Jun 13, 2025 11:24:51 PM
DefaultAdmin	***** 	May 14, 2025 10:31:33 PM
DefaultAdmin	***** 	Apr 14, 2025 10:31:11 PM

Rotate passwords

Cancel Save Save & close

# What about that offboarding user flow?



# Connect with the Product Team

We'd love to have interviews  
with you!

[nerdio.co/nmm-pdi](https://nerdio.co/nmm-pdi)



Please remember to fill out the post-breakout survey

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Q&A

# 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!