

# Pia aiDesk Automations Catalog

Pia SmartForms Automations	Cloud Hybrid	Cloud Only	Prem Only	Semi Hybrid
<i>Pia SmartForms are zero-touch automations, allowing MSP's clients to submit tickets, which then trigger Pia to fully automate the request without requiring engineer oversight.</i>				
<b>Account Locked Out</b> Enables MSP's clients to use SmartForm to submit a request for unlocking the account, trigger the automation package without the need for engineer oversight.	✓	✓	✓	
<b>Change Calendar Permissions</b> Allow MSP's clients to furnish all requisite data via SmartForm, triggering the zero-touch automation that modifies Exchange calendar permissions.	✓	✓		✓
<b>Create or Remove a Mail Forwarding Rule</b> Grants MSP's clients the ability to initiate the zero-automation process for creating or removing mail forwarding rules by submitting a SmartForm request.	✓	✓	✓	
<b>Grant or Remove Mailbox Access</b> Allows your client to submit a request to modify mailbox access for a selected mailbox via a SmartForm, triggering the automation without the need for engineer oversight.	✓	✓	✓	
<b>IT Help Request</b> SmartForms enabled MSP clients are automatically provided with a form, featuring general questions. Upon completion and submission by the client, a ticket is generated in the ticketing system, including the client-provided information.	✓	✓	✓	✓
<b>Reset Network Password</b> Allows your clients to submit a SmartForm and trigger the zero-touch automation to reset the selected user network password.	✓	✓	✓	✓
<b>Setup Out of Office</b> Enables the MSP's clients to submit a SmartForm and trigger the automation to set up a new Out of Office message or remove an existing Out of Office setup for the selected user.	✓	✓		

<b>Pia SmartForms Automations</b>	<b>Cloud Hybrid</b>	<b>Cloud Only</b>	<b>Prem Only</b>	<b>Semi Hybrid</b>
<p><b>Staff Offboarding</b> Allows your clients to submit a SmartForm to request and trigger the automation to terminate an existing user from their environment.</p>	✓	✓	✓	✓
<p><b>Staff Onboarding</b> Allows your clients to submit a SmartForm to request and trigger the automation to create a New User in their environment.</p>	✓	✓	✓	✓

<b>Manage Staff &amp; Access</b>	<b>Cloud Hybrid</b>	<b>Cloud Only</b>	<b>Prem Only</b>	<b>Semi Hybrid</b>
<p><b>Account Locked Out</b> This automation allows the Service Desk Technicians to unlock accounts with Pia.</p>	✓	✓	✓	✓
<p><b>Add / Remove User from Groups</b> Efficiently manage user-group assignments, ensuring accurate and up-to-date group memberships in Azure AD.</p>	✓	✓	✓	✓
<p><b>Bulk Add / Remove Contacts to Group</b> Streamlines group management, ensuring accuracy and synced data</p>	✓	✓	✓	✓
<p><b>Bulk Add / Remove Users to Group</b> Streamlines group management, improves efficiency by automating membership updates, and reduces manual errors.</p>	✓	✓	✓	✓
<p><b>Bulk Update User Details</b> Streamlines bulk user updates in Active Directory, saves time and minimizes errors.</p>	✓	✓		
<p><b>Bulk Staff Offboarding</b> Automates the termination of multiple user accounts in Active Directory and Microsoft 365, ensuring fast and secure offboarding at scale.</p>	✓	✓	✓	✓
<p><b>Change User Details</b> This package allows the Service Desk Technicians to change the details of a selected user.</p>	✓	✓	✓	✓

Manage Staff & Access	Cloud Hybrid	Cloud Only	Prem Only	Semi Hybrid
<p><b>Create Group Package</b> This package allows the Service Desk Technicians to create the following types of groups: Distribution Lists, Security Groups, Mail-Enabled Security Groups, and Unified/Microsoft 365 Groups.</p>	✓	✓	✓	✓
<p><b>Get User Account Details</b> This process lets administrators quickly retrieve, sort, and map user data, enhancing access and readability with user-friendly forms.</p>	✓	✓	✓	
<p><b>Manage User Licenses</b> This package allows the Service Desk Technicians to add and remove 365 licenses from the end user.</p>	✓	✓		✓
<p><b>Re-allocate User License</b> This process removes the manual complexities of managing Azure AD licenses and Exchange mailbox conversions.</p>	✓	✓		✓
<p><b>Re-enable Terminated Account</b> This package will re-enable an already terminated account, reassign licenses, and reset the account passwords.</p>	✓	✓	✓	
<p><b>Reset Network Password</b> The package will reset the user's account password in either Active Directory or Microsoft Office 365 or both.</p>	✓	✓	✓	✓
<p><b>Reset Multi-factor Authentication Package</b> This package allows you to revoke user MFA sessions (requiring users to re-register MFA), remove MFA methods and check current MFA methods configured for the user.</p>	✓	✓		✓
<p><b>Staff Offboarding (Terminate User)</b> This package will terminate a user account in Active Directory or the Microsoft Office 365 Cloud.</p>	✓	✓	✓	✓
<p><b>Staff Onboarding (New User)</b> Streamlines and automates user onboarding processes, ensuring accurate and efficient setup of user accounts, licenses, and mailboxes</p>	✓	✓	✓	✓
<p><b>Upload Staff Photo</b> This package allows the Service Desk Technicians to upload a photo to the end user's cloud profile.</p>	✓	✓		✓

<b>Email &amp; Calendar</b>	<b>Cloud Hybrid</b>	<b>Cloud Only</b>	<b>Prem Only</b>	<b>Semi Hybrid</b>
<b>Blacklist Email</b> Streamlines email blacklist management and automates interaction with Exchange	✓	✓		✓
<b>Blacklist Email (Manage Protect)</b> Efficiently manage and maintain email blacklist and whitelist with an automated workflow for Pia and Manage Protect users.	✓	✓	✓	✓
<b>Change Calendar Permissions</b> Streamline Exchange calendar permissions management and enhance security	✓	✓	✓	
<b>Create Shared Mailbox</b> This package allows the Service Desk Technicians to create a new shared mailbox.	✓	✓	✓	✓
<b>Create Mail Contacts</b> Efficient mail contact management and consistent directory synchronization.	✓	✓	✓	
<b>Delete Mail Contacts</b> This package allows the Service Desk Technicians to delete mail contacts within the client's environment.	✓	✓	✓	
<b>Get Mailbox Information</b> Through this process, users can conveniently retrieve comprehensive information about Exchange mailboxes.	✓	✓		✓
<b>Grant Mailbox Permission</b> This package allows the Service Desk Technicians to change mailbox permissions on a selected end user.	✓	✓		✓
<b>Grant Mailbox Permission in Bulk</b> This automated process greatly reduces the time and effort required to manage Exchange mailbox permissions manually.	✓	✓		✓
<b>Hide Mailbox from Global Address List</b> This package allows the Service Desk Technicians to hide user(s) and/or mailbox(es) from the Global Address List without having to log into your customer's Exchange.	✓	✓	✓	

Email & Calendar	Cloud Hybrid	Cloud Only	Prem Only	Semi Hybrid
<p><b>Modify Distribution Group Settings</b> This package allows the Service Desk Technicians to change the settings of a distribution group. Settings include: display name, email address &amp; suffix, delivery management, message approval.</p>	✓	✓		
<p><b>Outlook Mail Flow Troubleshooting</b> Allow Service Desk Technicians to troubleshoot mail flow problems within Microsoft Exchange and Outlook.</p>	✓	✓		
<p><b>Recover Lost Folder in Outlook</b> The package allows the Service Desk Technicians to attempt to relocate folders in Outlook back to the inbox for the end user.</p>	✓	✓		
<p><b>Release Quarantined Emails</b> This package releases emails from cloud quarantine systems.</p>	✓	✓		✓
<p><b>Set Mail Forwarding</b> Automate and simplify mail forwarding setup in Exchange and Office 365, saving time and reducing errors.</p>	✓	✓		✓
<p><b>Setup Out of Office</b> Allows the Service Desk Technicians to setup Out of Office message &amp; scheduling for the end user</p>	✓	✓		✓
<p><b>Whitelist Email</b> This package allows the Service Desk Technicians to allow email addresses or domains on the client's mail system.</p>	✓	✓		✓
<p><b>Whitelist Email (Manage Protect)</b> This workflow automates adding/removing whitelist emails, verifying blacklist entries, managing lists, and removing duplicate entries.</p>	✓	✓	✓	✓
<p><b>Win10 Outlook Package</b> This package will allow the Service Desk Technicians to troubleshoot Outlook on the client's workstation.</p>	✓	✓		

Computer	Cloud Hybrid	Cloud Only	Prem Only	Semi Hybrid
<p><b>Computer Performance Report</b> This package allows the Service Desk Technicians to check the client's computer for performance issues.</p>	✓	✓		✓
<p><b>Computer Space Clean up</b> Efficiently and effectively reclaim valuable storage space while optimizing computer performance.</p>	✓	✓	✓	✓
<p><b>File Share Security Change</b> Allows the Service Desk Technicians to change file share permissions on servers.</p>	✓		✓	
<p><b>Get Software Information</b> Facilitates the retrieval of information on applications installed on computers via winget.</p>	✓	✓	✓	✓
<p><b>Install / Uninstall / Reinstall Software</b> This automated workflow significantly reduces manual labor and potential errors by providing a standardized process for software management.</p>	✓	✓	✓	
<p><b>Map Network Drive Package</b> This page will aid the Service Desk Technicians in mapping network drives for the end user.</p>	✓		✓	
<p><b>Microsoft Teams Troubleshooter</b> The package reviews and actions the current Team settings and states in order to undertake some basic Teams troubleshooting.</p>	✓	✓		
<p><b>Network Drive Troubleshooting</b> The package will allow the Service Desk Technicians to troubleshoot network drive connections on the end user's computer, attempting to detect and auto-resolve connection issues.</p>	✓		✓	
<p><b>OneDrive Troubleshooting</b> Automatically executes troubleshooting steps for efficient OneDrive issues troubleshooting by Service Desk Technicians.</p>	✓	✓	✓	✓

Computer	Cloud Hybrid	Cloud Only	Prem Only	Semi Hybrid
<b>Restart Services</b> Allows an end user to seamlessly and individually restart services on a workstation and see status reports			✓	
<b>Troubleshoot Windows VPN Configuration</b> The package will allow the Service Desk Technicians to check various issues that may impact the VPN connecting successfully, such as: account locked & expired, wrong security group, VPN server address	✓	✓	✓	✓

VPN & Remote Desktop	Cloud Hybrid	Cloud Only	Prem Only	Semi Hybrid
<b>Deploy SonicWall VPN</b> This process simplifies VPN profile deployment to end-users and ensures a faster, more secure connection.	✓	✓		
<b>Log Out User from Citrix Session</b> Allows the Service Desk Technicians to end user's Citrix sessions.	✓	✓	✓	✓
<b>Log Out User from Windows RDS</b> The package will obtain a list of users logged into the environment's RDS Session Host servers and then present log-out options for the Service Desk Technicians to select.	✓	✓	✓	✓
<b>OpenVPN Setup / Reinstall</b> The package allows the Service Desk Technicians to manage the installation of the OpenVPN client & VPN access security group.	✓		✓	
<b>Remote Desktop Setup</b> This package allows the Service Desk Technicians to configure RDP shortcuts for the end user and optionally send an email to the end user notifying them of success	✓	✓	✓	
<b>Remote Desktop Troubleshooting</b> This package allows the Service Desk Technicians to troubleshoot RDP shortcuts for the end user. It will check for user account locked or disabled, expired password and member of the correct security group.	✓	✓	✓	
<b>VPN Setup</b> Efficiently sets up VPN connections, ensuring secure and seamless access for users while keeping a log of the process.	✓	✓		

General	Cloud Hybrid	Cloud Only	Prem Only	Semi Hybrid
<b>Start Azure DirSync</b> Ensures updated synchronization of local AD and Azure AD.	✓			
<b>Send SMS to User</b> This package allows the Service Desk Technicians to send an SMS to the end user.	✓	✓	✓	✓

Printing	Cloud Hybrid	Cloud Only	Prem Only	Semi Hybrid
<b>Win10 Install Network Printer Install Printer</b> The package will check to determine if there are any AD printers available, as well as scan the local network for available printers, it will then allow the Service Desk Technicians to attempt to install the discovered printers.	✓	✓		
<b>Printer Troubleshooting Package</b> The package will perform troubleshooting steps against the target computer and its printers. This includes checking the print spooler status and querying the printer's state.	✓	✓		

**Environments Supported**

- Cloud Hybrid: On-premise Active Directory with AADC syncing to O365/Azure
- Cloud Only: Office 365/Azure and no on-premise Active Directory
- On-Prem Only: On-premise Active Directory and no Office 365
- Semi Hybrid: On-premise Active Directory and Office 365/Azure but, with no AADC sync between the two environments

