LDI Plus MSP User Guide

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Revision History

S. No.	Published On	Version	Description	Approved By	Remarks
1	15 June 2022	1.0	Added MSP features		

Contents

1   Overview

The Managed Service Provider (MSP) features allow IT Administrators and Engineers to provide proactive and remote management for their end customers' devices leveraging full features of LDI software. You can create parent-child organizations' hierarchy and hence provides multi-tenancy support. If you convert your organization to a Managed Service Provider (MSP) organization, then you can create many child organizations within your organization to manage them.

Note: An MSP organization has access to all the modules that a non-MSP organization has; additionally, an MSP organization has two more modules – Managed Organizations and Licenses.

As part of MSP features, you can perform the following tasks:

- Onboard your end customers as managed organizations
- Assign dedicated technicians to manage a particular manage organization
- Distribute licenses among your managed organizations
- Switch between your managed organizations and perform all the standard device management operations. For description of all standard software features, refer to the main User Guide document.

2   Organization & User Management

2.1   Setup Your Organization as an MSP

When your organization's portal is created, a single administrative account is also created. The IT Owner of Lenovo at the time of sale receives a notification email regarding access grant to your organization.

Click the link received in the email to log in to LDI as an LDI Administrator.

To set up your organization as MSP:

1. Click on your user icon and navigate to **Organization Settings → Features**.
2. Click **Convert to MSP**. The Convert Organization to MSP confirmation window appears.
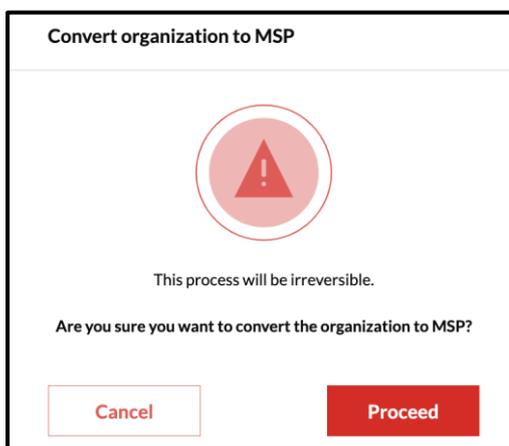
3. Click **Proceed**.

You can now use MSP related features to manage your end customers.

2.2   MSP User Role Types

When adding users to your portal, there are two MSP related role types to assign:

- MSP Organization Administrators
- MSP Technician – this user can only access functions within those managed organizations assigned to her/him.

The following table compares the functionalities of both the roles:

|	Role	
Function	**MSP Organization Admin**	**MSP Technician**
Dashboard	✓	✓
View Users	✓	✓
Manage Users	✓	✓
View Devices	✓	✓
Manage Devices	✓	✓
Manage User Groups	✓	✗
Manage Device Groups	✓	✓
View/Update Managed Organizations	✓	✓
Create Managed Organizations	✓	✗
Assign MSP Technicians to managed organizations	✓	✗
View/Manage MSP Licenses	✓	✗
Create Support Tickets	✓	✓
Reports	✓	✓

Note: MSP Admin has all the access privileges to view, edit, and modify the parent and child organizations but the MSP Technician has access privileges to only those child organizations that MSP Admin has granted.

2.3   Create a Managed Organization

To manage users and devices of your end customer organization, create a managed organization in the portal.

To create a new managed organization:

1. Select **Managed Organizations.**
2. Click .
3. Enter all the required information.
4. Click **Continue**.
5. In the **Assigned Users** window, select MSP Technician user(s).
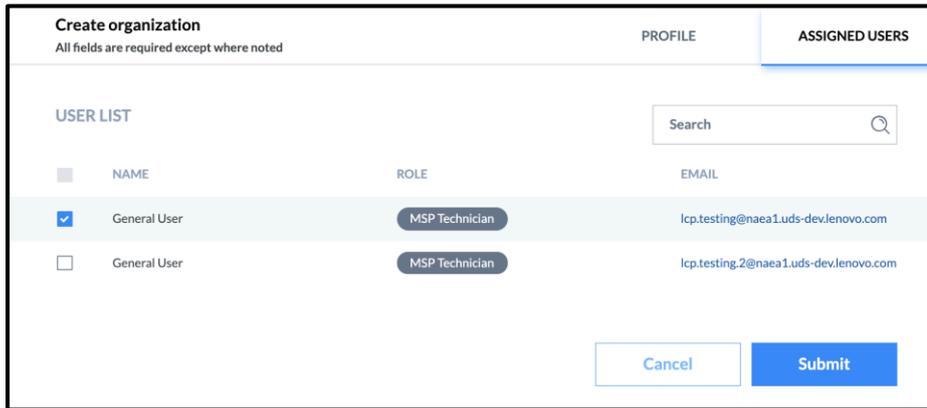
6. Click **Submit**. A new managed organization is created in Pending status and selected MSP Technician user(s) are assigned to this organization. Managed organization becomes active once new licenses are assigned to it by MSP admin.
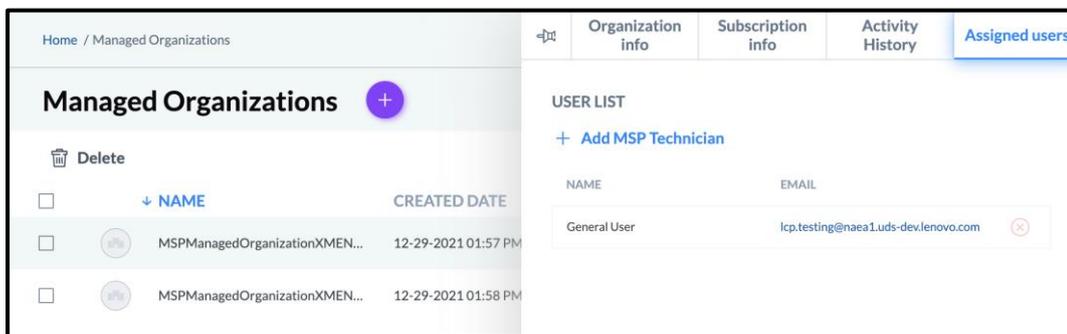
An email notification is sent to the user informing that she/he has been assigned to the managed organization.

Note: Steps to assign users during creation is optional and can be performed separately after an organization is created.

2.4 Assign or Unassign a User to Managed Organization

To assign new MSP technician to an existing managed organization:

1. In the **Managed Organization** page, select an organization to open its corresponding Organization Tray.
2. Open **Assigned Users** tab.

3. Click **Add MSP Technician.**
4. In the pop-up window, select user from the list and click **Submit**. A new MSP technician is displayed in the Organization tray. An email notification is sent to the user informing that she/he has been assigned to the managed organization.

You can unassign a user with MSP Technician role from the organization.

To unassign the new MSP technician to an existing managed organization:

1. In the **Assigned Users** tab, click **x** button for the necessary user in the list. An email notification is sent to the user informing that she/he has been unassigned from the managed organization.

2.5 Switch Between Managed Organizations

To switch between your managed organizations data, use the organization drop-down selector which is present on:

- Dashboard
- Reports
- Device Manager
- Users Manager
- Support Tickets
- Help & Resources

Select **My Organization** option in the drop-down list to return to your MSP Organization.

2.6 Delete a Managed Organization

Note: You cannot delete an MSP if there are devices with active licenses assigned to them. In case there are licenses unassigned to the devices, during deletion of the managed organization those licenses are transferred back automatically to the parent MSP Organization.

To delete the organization:

1. In the **Managed Organization** page, select necessary managed organization.
2. Click **Delete**. A confirmation window appears.
3. Click **Continue**.
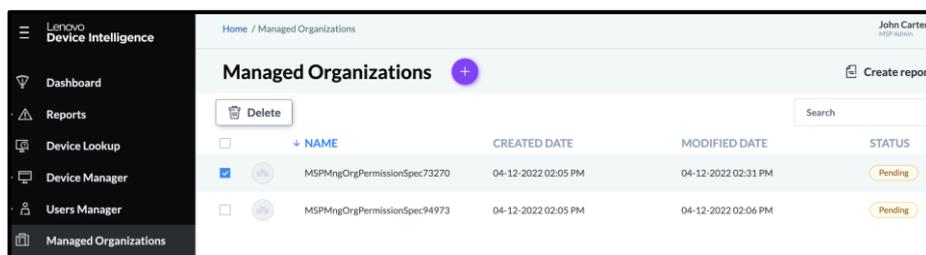
Unassigned licenses are transferred back to the parent MSP organization. MSP technicians are unassigned from the deleted organization.

3   License Management

3.1   View Licenses at MSP Organization Level

You can view a set of licenses available at the MSP organization level. Such licenses can be distributed among MSP's managed organizations and their devices or users.

To view the list of licenses:

1. Navigate to **Licenses.**
2. In the **Organization** drop-down list, select your MSP organization. All licenses of your organization are displayed in the page.

3. To view details of a particular license, click on the license in the table to open the tray with details.

License tray displays the following license details:

- Number of available licenses which are available for distribution or transfer to managed organizations.
- Transferred licenses table which displays the list of licenses which have been already transferred to your managed organizations.
- Billing term.
- Start date and expiry date.

3.2   License Transfer to a Managed Organization

You can transfer device licenses from MSP organization to managed organizations.

To transfer licenses:

1. Navigate to **Licenses**.
2. Select one of the license items in the table to open License Tray.
3. In the pop-up window, fill the required quantity to transfer and select target managed organization.
4. Click **Transfer**.

An email notification is sent to the assigned MSP Technician(s) that new licenses are added.

3.3   Reverse License Transfer from a Managed Organization

You can transfer licenses back from a managed organization to its parent MSP organization.

To transfer licenses back to MSP:

1. Navigate to **Licenses**.
2. In the organization drop-down list, select necessary managed organization.
3. Click **Transfer**.

4. In the pop-up window, fill the required quantity to transfer.
5. Click **Transfer**. A confirmation window appears.
6. Click **Continue**.