

User onboarding and managing agent

Automate governed user onboarding and access updates in Dynamics 365 with AI-driven request intake, validation, approvals, provisioning and auditability.

Overview

The user onboarding and managing agent helps organizations reduce manual administration effort, improve governance and process user access requests consistently based on predefined rules and approval workflows.

The agent monitors user onboarding and update requests received through email, extracts and validates request details, routes approvals, and provisions or updates users in Microsoft Dynamics 365 Finance and Operations. It is designed for system administrators, support admin managers and IT managers responsible for user access management, onboarding governance and operational support.

Challenges

- Email-based request intake
- Inconsistent data quality
- Manual validation steps
- Fragmented approval handling
- Duplicate or incorrect provisioning
- Limited audit traceability

Key capabilities

- Email monitoring
- Intelligent request extraction
- Request clarification handling
- Microsoft Entra ID user verification
- Request data validation
- Failure notification handling
- Dynamic approval determination

- Workflow-based approval management
- Rejection handling
- User creation and update in Dynamics 365 Finance and Operations
- Profile and attribute updates
- Person and employee mapping
- Security role assignment
- Legal entity assignment

How it works

1. Request intake and classification

The agent receives user requests through a dedicated mailbox, such as iam@company.com, and uses AI Builder to extract structured data from the email. It captures request type and details, extracts user attributes such as roles and legal entities, classifies the request as create or update, and sends an acknowledgment to the requester.

2. Prerequisite checks

The validation engine checks mandatory system and identity prerequisites before processing. It verifies whether the user exists in Microsoft Entra ID, validates account status and email or UPN format, and checks role and legal entity mappings.

3. Approval workflow

The request is routed through Teams bot-based approval workflows based on request type and sensitivity. Approvals can include manager approval for new or modified users and legal entity owner approval.

4. User and access provisioning

Once approved, the agent creates or updates the user in Dynamics 365 Finance and Operations. It assigns or updates security roles, legal entities, and person or employee mapping.

5. Notifications and audit logging

The agent sends a completion email with a summary and notifies relevant stakeholders, such as the manager, IT and security teams. Request details, approvals and actions performed are logged, with request details and logs stored in SharePoint. The audit trail captures who, what, when and from where for compliance.

6. Exception handling

The agent detects validation or processing errors, notifies the requester with the reason for failure, provides resolution guidance and supports request resubmission.

Business impact

- Faster user provisioning
- Reduced manual effort
- Reduced human errors
- Strong audit and governance
- Controlled access management
- Consistent onboarding process
- Faster request resolution
- Reduced helpdesk dependency
- Policy-driven approvals
- End-to-end visibility
- Handles high request volumes
- Reliable user data in D365
- Reduced process failures
- Better operational insights

Who benefits?

- System administrators
- Support admin managers
- IT managers
- System administrators
- Support admin managers
- IT managers

Sales inquiry:

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