

## Task Automation for Microsoft 365

Create no-code automations with over 150+ out-of-the-box actions, leverage PowerShell and 3rd party APIs for custom actions, and even automate user onboarding and offboarding across hybrid AD/Entra environments with CoreView's hybrid management capabilities.

### The Challenge: M365 Admins Are Overwhelmed

Microsoft 365 is the world's most powerful digital workspace, but with so many capabilities, the tasks of IT administration becomes complex:

- 18+ Admin Interfaces
- 40+ Workloads
- 5000+ Configuration Types
- Hybrid and Multi-Tenant Orgs
- PowerShell Sprawl
- Constant Updates to UI

Every additional interface makes administration complex, slowing down your most talented people, and leading to misconfigurations and PowerShell sprawl.

### CoreView Task Automation for Microsoft 365

CoreView ONE gives IT teams a powerful Task Automation engine that allows you to automate tasks like user onboarding and offboarding.



### What Task Automation Does for You:

**Automate Repetitive Tasks in Microsoft 365:** Create automation workflows using 150+ out-of-the-box actions and custom actions.

**Automate User Onboarding and Offboarding:** Develop workflows to automate the user onboarding and offboarding process for M365.

**Automate User Management Across Hybrid Environments:** Set up workflows for user management in hybrid Microsoft environments.

**Use PowerShell and Call Third-Party APIs for Custom Actions:** Design custom automations using PowerShell and third-party APIs.

**Insert Branching Logic for Complex Use Cases:** Implement if/then logic to ensure your workflows can manage multiple scenarios.

**Implement Approvals and Attestations:** CoreView allows for approvals and attestations so that actions receive necessary approvals.

**Integrate with ServiceNow for Approvals:** Customers can use CoreView to trigger approval workflows within ServiceNow.

### End-to-end Coverage

#### Tenant Level Configurations



#### Microsoft 365 Workloads



#### On-Premises Environments



#### Complex Environments



#### Objects Analyzed

Users, Groups, Licenses, Mailboxes, Calendars, Intune Devices, Mobile Devices, Entra Apps, SharePoint Sites, OneDrive Accounts, Teams Groups, Teams Channels, Calls, Phone Numbers, Call Queues, and Auto-Attendants.

Feature	CoreView Tenant Resilience	CoreView Tenant Management	CoreView ONE	CoreView ONE Enterprise
Visibility and Control	<ul style="list-style-type: none"> <li>Security and identity risk dashboards</li> <li>Custom dashboards</li> <li>Alerts</li> <li>50+ OOTB resilience reports</li> <li>Custom reports</li> <li>Multi-tenant mgmt.</li> </ul>	<ul style="list-style-type: none"> <li>Governance dashboard</li> <li>Custom dashboards</li> <li>Alerts</li> <li>130+ OOTB resilience and management reports</li> <li>Custom reports</li> <li>Multi-tenant mgmt.</li> </ul>	<ul style="list-style-type: none"> <li>Security and identity risk dashboards</li> <li>Governance dashboard</li> <li>Custom dashboards</li> <li>Alerts</li> <li>130+ OOTB resilience and management reports</li> <li>Custom reports</li> <li>Multi-tenant mgmt.</li> </ul>	<ul style="list-style-type: none"> <li>Security and identity risk dashboards</li> <li>Governance dashboard</li> <li>Custom dashboards</li> <li>Alerts</li> <li>130+ OOTB resilience and management reports</li> <li>Custom reports</li> <li>Multi-tenant mgmt.</li> </ul>
Configuration Management	<ul style="list-style-type: none"> <li>Backup &amp; restore tenant configurations</li> <li>Align with industry baselines</li> <li>Drift detection</li> <li>Configuration change management</li> <li>Multi-tenant configuration deployment</li> </ul>	<ul style="list-style-type: none"> <li>n/a</li> </ul>	<ul style="list-style-type: none"> <li>Backup &amp; restore tenant configurations</li> <li>Align with industry baselines</li> <li>Drift detection</li> <li>Configuration change management</li> <li>Multi-tenant configuration deployment</li> </ul>	<ul style="list-style-type: none"> <li>Backup &amp; restore tenant configurations</li> <li>Align with industry baselines</li> <li>Drift detection</li> <li>Configuration change management</li> <li>Multi-tenant configuration deployment</li> </ul>
Policy Enforcement	<ul style="list-style-type: none"> <li>30+ OOTB policy playbooks and remediations for:</li> <li>Security, Identity, Entra Apps</li> </ul>	<ul style="list-style-type: none"> <li>100+ OOTB policy playbooks and remediations for:</li> <li>Security, Identity, Entra Apps,</li> <li>Licenses, SharePoint &amp; OneDrive, Teams, Devices, Copilot</li> <li>Custom policies</li> </ul>	<ul style="list-style-type: none"> <li>100+ OOTB policy playbooks and remediations for:</li> <li>Security, Identity, Entra Apps,</li> <li>Licenses, SharePoint &amp; OneDrive, Teams, Devices, Copilot</li> <li>Custom policies</li> </ul>	<ul style="list-style-type: none"> <li>100+ OOTB policy playbooks and remediations for:</li> <li>Security, Identity, Entra Apps,</li> <li>Licenses, SharePoint &amp; OneDrive, Teams, Devices, Copilot</li> <li>Custom policies</li> </ul>
Task Automation	<ul style="list-style-type: none"> <li>50+ OOTB “no code” task automation actions for:</li> <li>Users, Security groups, Distribution groups, Entra Apps, Exchange</li> </ul>	<ul style="list-style-type: none"> <li>150+ OOTB “no code” task automation actions for:</li> <li>Users, Security groups, Distribution groups, Entra Apps, Exchange</li> <li>M365 groups, Teams, SharePoint &amp; OneDrive, Devices</li> <li>Custom workflows including PowerShell</li> <li>User templates for onboarding, moving and offboarding</li> </ul>	<ul style="list-style-type: none"> <li>150+ OOTB “no code” task automation actions for:</li> <li>Users, Security groups, Distribution groups, Entra Apps, Exchange</li> <li>M365 groups, Teams, SharePoint &amp; OneDrive, Devices</li> <li>Custom workflows including PowerShell and 3rd party APIs.</li> <li>User templates for onboarding, moving and offboarding</li> </ul>	<ul style="list-style-type: none"> <li>150+ OOTB “no code” task automation actions for:</li> <li>Users, Security groups, Distribution groups, Entra Apps, Exchange</li> <li>M365 groups, Teams, SharePoint &amp; OneDrive, Devices</li> <li>Custom workflows including PowerShell and 3rd party APIs.</li> <li>User templates for onboarding, moving and offboarding</li> </ul>
Delegation Management	<ul style="list-style-type: none"> <li>Optional add-on</li> </ul>	<ul style="list-style-type: none"> <li>Virtual tenant segmentation by over 400 properties (User, Group, Domain, admin task etc.)</li> <li>Cross-tenant segmentation</li> </ul>	<ul style="list-style-type: none"> <li>Virtual tenant segmentation by over 400 properties (User, Group, Domain, admin task etc.)</li> <li>Cross-tenant segmentation</li> </ul>	<ul style="list-style-type: none"> <li>Virtual tenant segmentation by over 400 properties (User, Group, Domain, admin task etc.)</li> <li>Cross-tenant segmentation</li> </ul>
Hybrid Management	<ul style="list-style-type: none"> <li>Optional add-on</li> </ul>	<ul style="list-style-type: none"> <li>Optional add-on</li> </ul>	<ul style="list-style-type: none"> <li>Optional add-on</li> </ul>	<ul style="list-style-type: none"> <li>Included (On-Premise Active Directory &amp; Exchange)</li> </ul>
Auditing (1 year retention)	<ul style="list-style-type: none"> <li>Optional add-on</li> </ul>	<ul style="list-style-type: none"> <li>Optional add-on</li> </ul>	<ul style="list-style-type: none"> <li>Optional add-on</li> </ul>	<ul style="list-style-type: none"> <li>Included</li> </ul>
Access reviews	<ul style="list-style-type: none"> <li>Optional add-on</li> </ul>	<ul style="list-style-type: none"> <li>Optional add-on</li> </ul>	<ul style="list-style-type: none"> <li>Optional add-on</li> </ul>	<ul style="list-style-type: none"> <li>Optional add-on</li> </ul>
User rewind	<ul style="list-style-type: none"> <li>Optional add-on</li> </ul>	<ul style="list-style-type: none"> <li>Optional add-on</li> </ul>	<ul style="list-style-type: none"> <li>Optional add-on</li> </ul>	<ul style="list-style-type: none"> <li>Optional add-on</li> </ul>
Data	<ul style="list-style-type: none"> <li>Optional add-on</li> </ul>	<ul style="list-style-type: none"> <li>Optional add-on</li> </ul>	<ul style="list-style-type: none"> <li>Optional add-on</li> </ul>	<ul style="list-style-type: none"> <li>Optional add-on</li> </ul>