Saved Action Sets for Onboarding Google Workspace users

On-boarding, Off-boarding & Modifying · https://gatlabs.com/knowledge/tech-tips/flow-action-set-for-onboarding-google-workspace-users/

Overview

When managing a growing organization, onboarding new Google Workspace users involves more than just creating an email address. It requires adding users to specific Google Groups, assigning appropriate product licenses, giving them permissions to set Shared Drives, or configuring standard email signatures.

Doing this manually for every single employee or bulk importing is time-consuming and prone to human error.

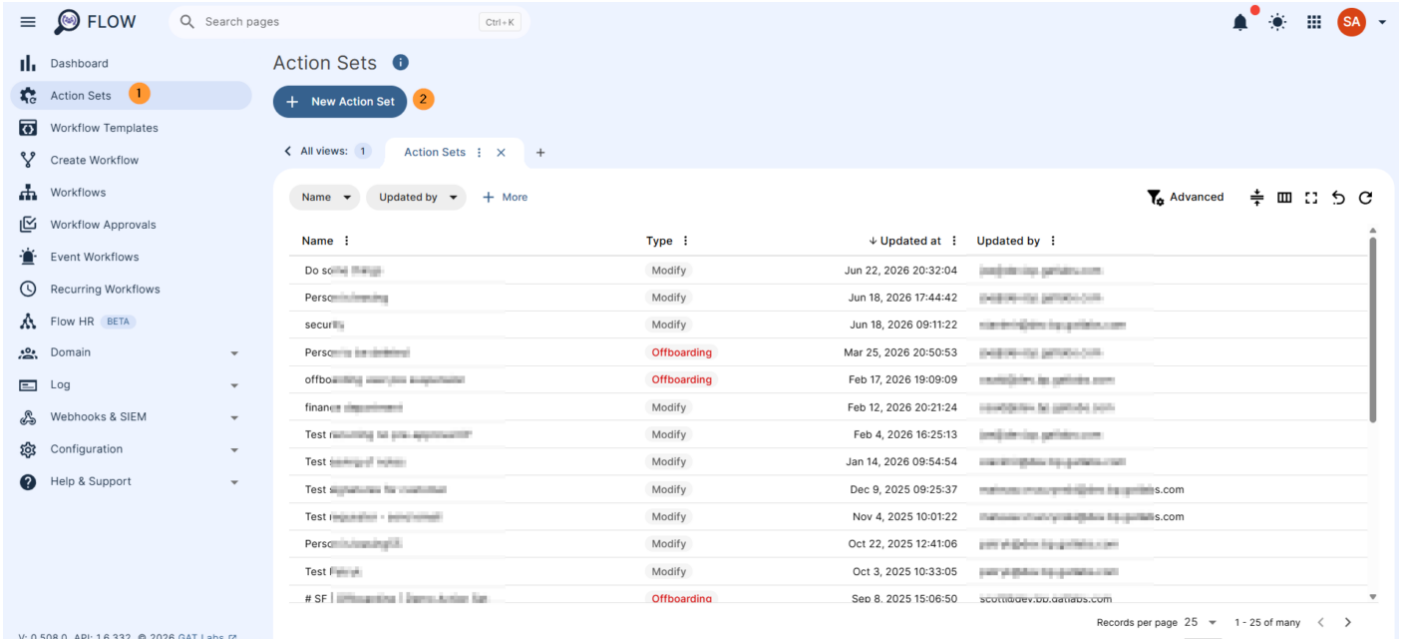
With **GAT Flow**, Google Workspace Super Admins can build and save a reusable blueprint of these tasks called an **Action Set**.

Once created, an Action Set allows you to quickly deploy complex, department-specific onboarding workflows in just a few clicks - eliminating repetitive setup and ensuring consistency across your domain every single time.

How to create an Action set for onboarding Google Workspace users?

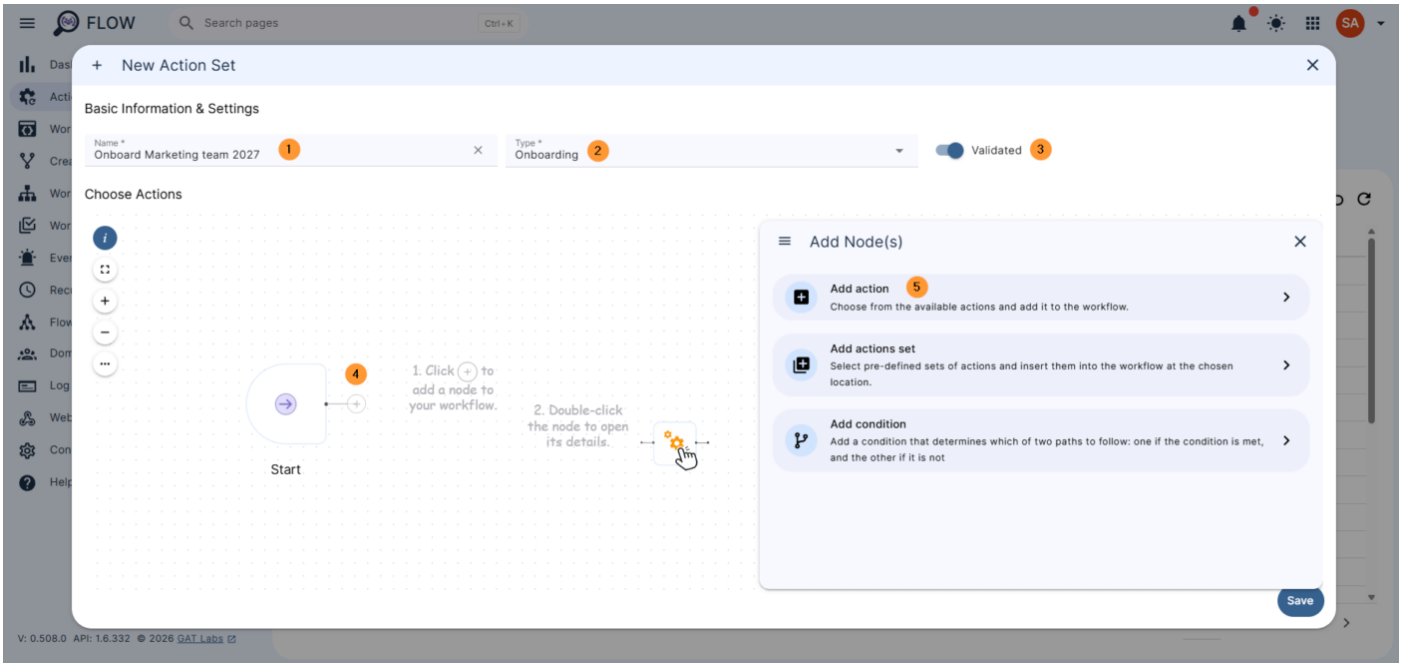
Navigate to GAT Flow.

From the menu on the left, click **Action Sets > New Action Set**



A new tab will be opened to fill in the details for the Action set you want to save.

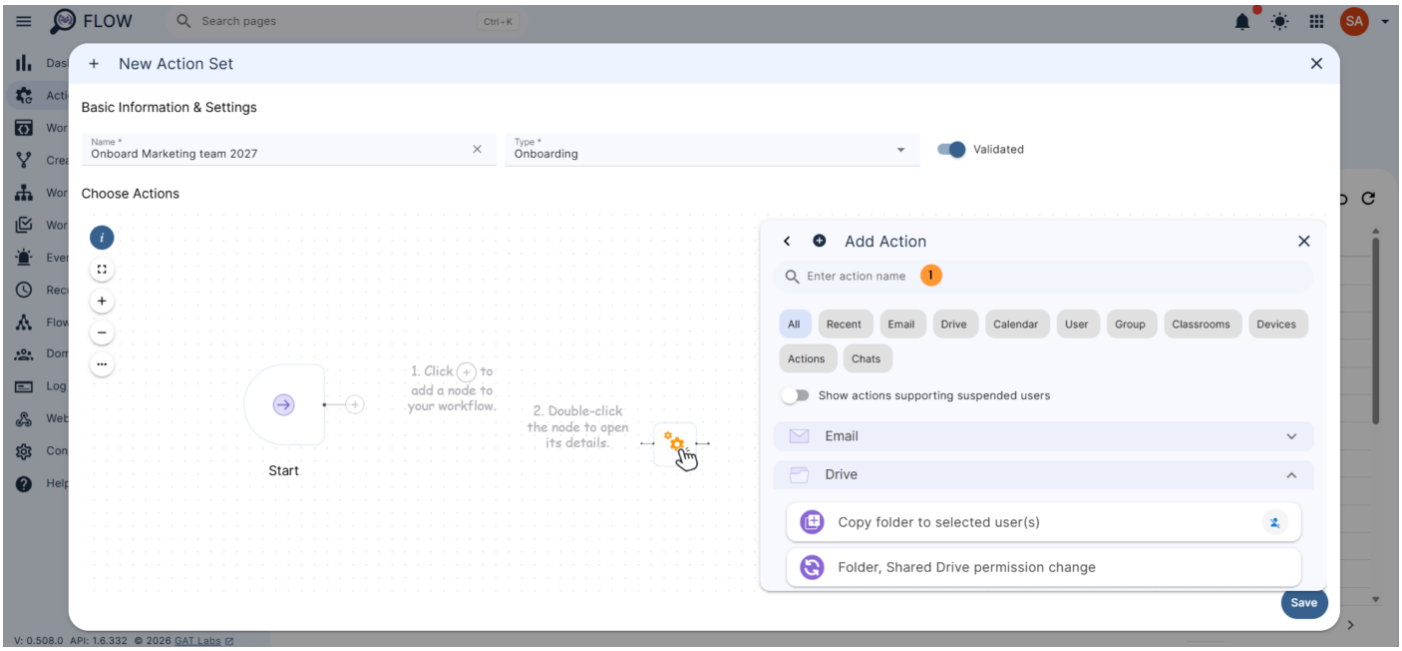
- **Name** - enter a name for the **Action set**
- **Type** - select the **Onboarding** type
- **Validated** - enable or disable validation.
  - This allows you to choose whether you want to fill all mandatory fields or leave them empty so they can be filled during workflow creation.
    - **Enabled** - will force you to pre-fill all of the settings within chosen actions.
    - **Disabled** - you can select actions but not necessarily fill in the settings for them.



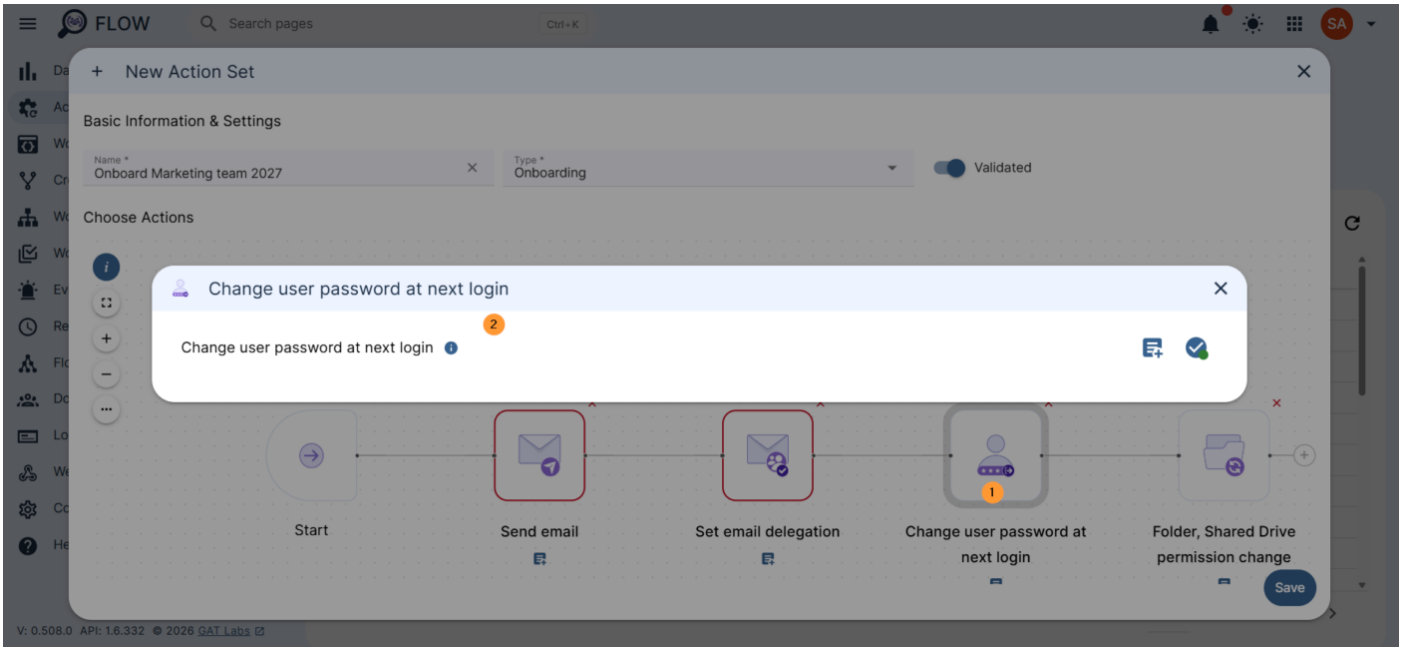
Click on the **+ button (4)** and **Add action (5)**

A menu with all the actions will be displayed.

You can **search** for **any action** and **select the actions** you want to **save as an Action set.**



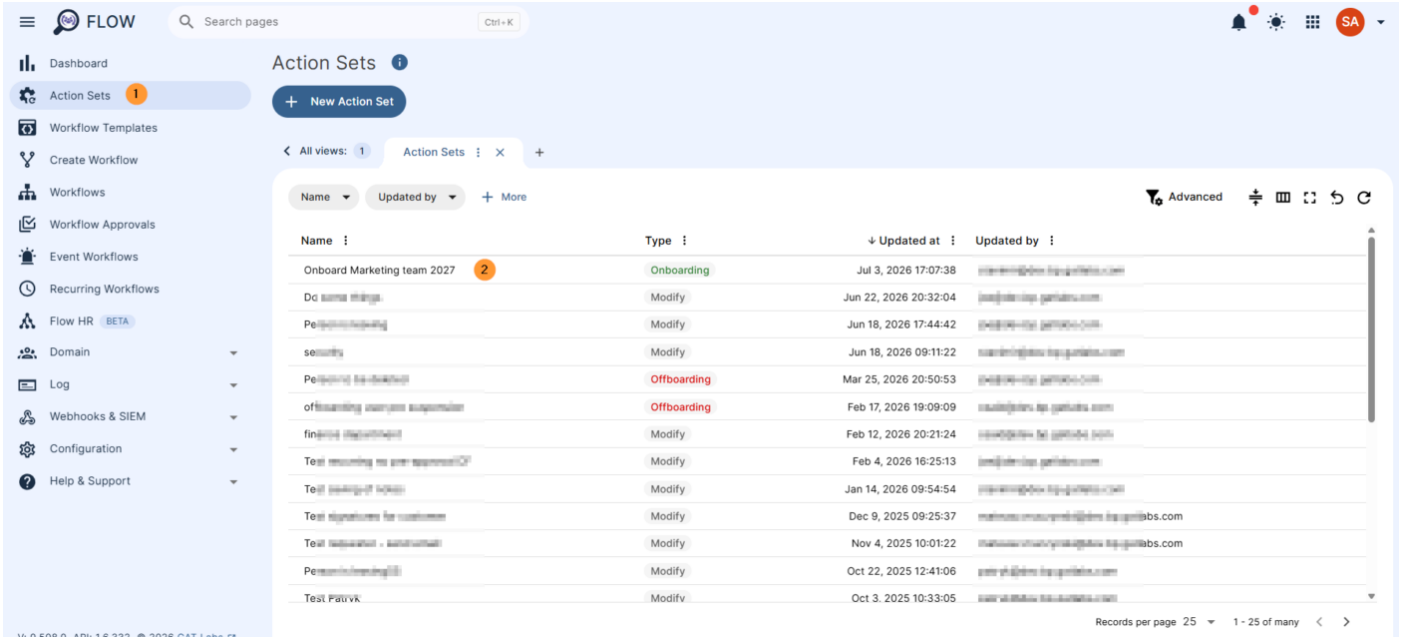
Select the **Action**, **double-click** on it to open and fill in its details



When ready with the action selection and details filed in, click on the **Save** button.

Result

When the action set is **saved**, it can be used over and over again for every workflow you want.



The saved action set will be displayed in the list of Action sets.

Hover over it and on the right side click on the pen icon to update or the bin/trash icon to delete

Use of the Saved Action set

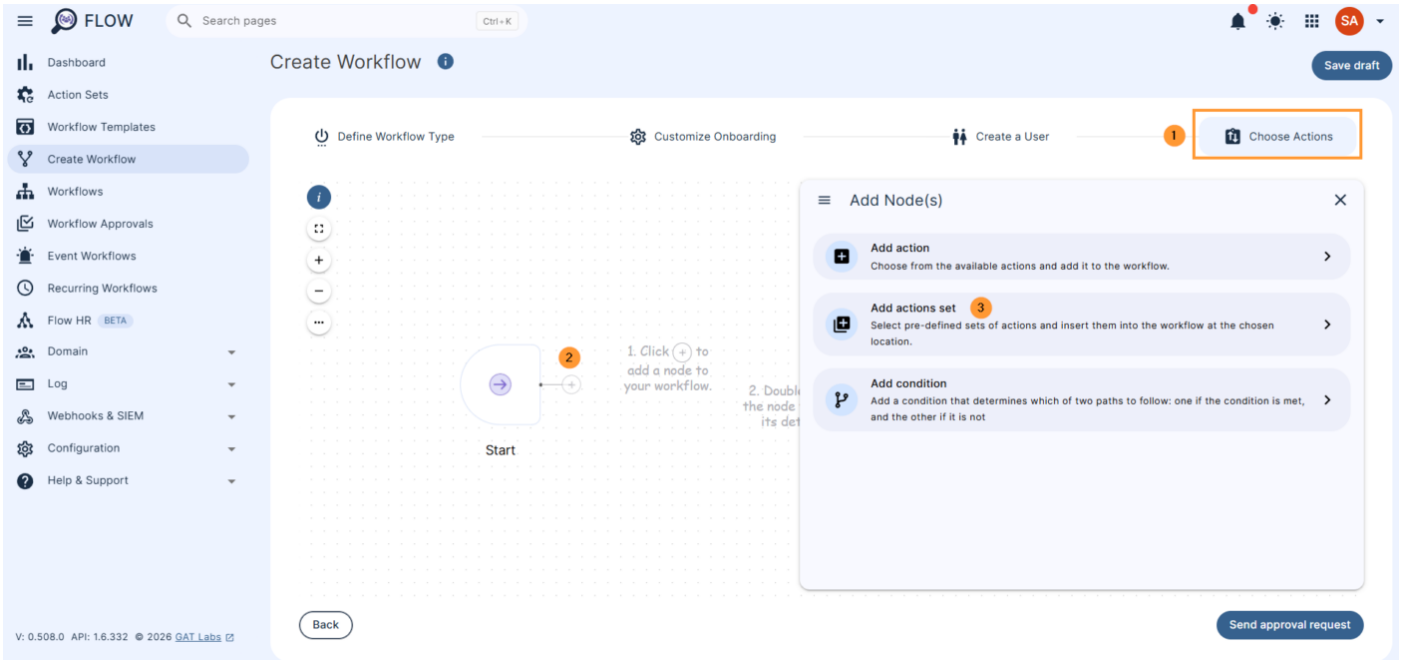
Create a simple onboarding workflow.

Define workflow type - enter the details.

- Name - enter the name for the workflow
- Type - select **Onboarding**
- Fill in all other details for the users
  - Customize onboarding
  - Create user - manually in Flow or Import
  - **Choose actions**

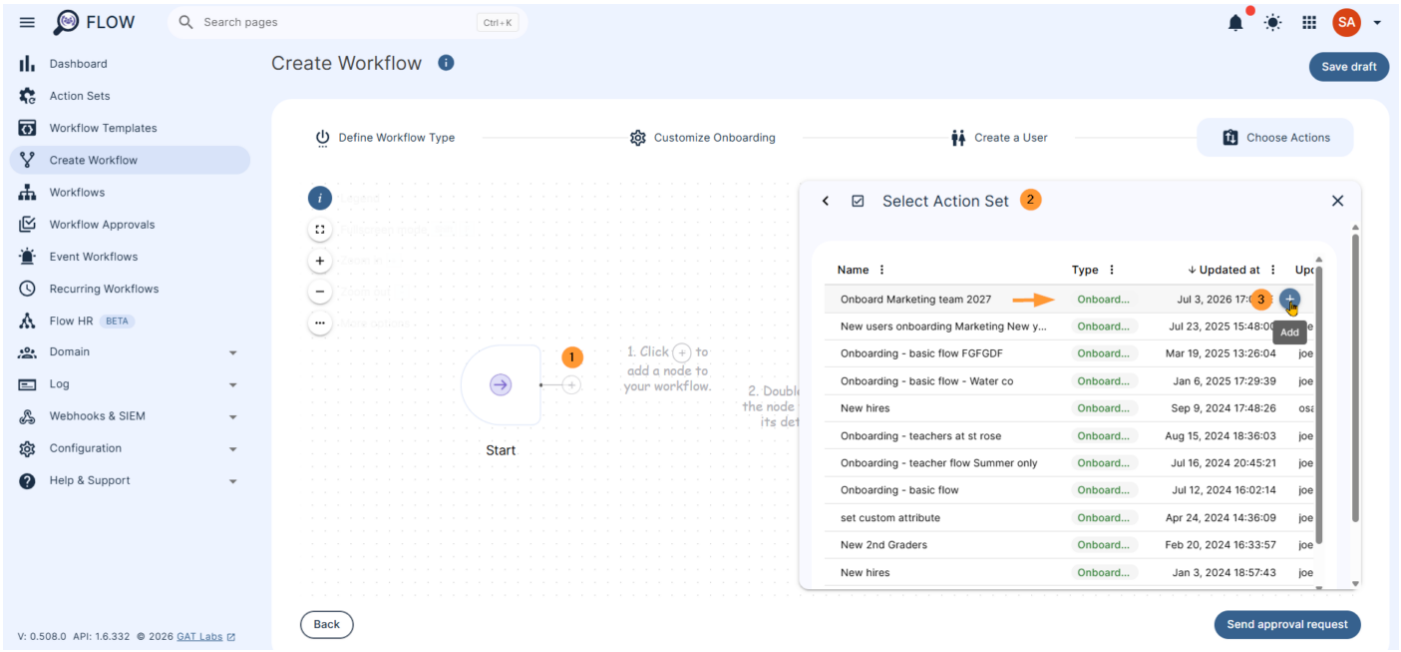
When users are added and in the Choose actions tab.

Click on the **+ button** and then select **Add actions set** (3)



A **pop-up window will appear** with **all the action sets** for the **Onboarding workflows.**

From the list, you will see the one we created above: **Onboarding Marketing team 2027**



Click on the **+ button** (2) to **apply the Action set**

A list of all actions associated with the **set** will be loaded.

Select the newly created **Action set**



Additional actions can be added by clicking on the + button

When ready, click on the "**Send approval request" (4)** button. A request will be sent to the **Security officer** for approval

When approved, the **actions will take effect,** and the **user accounts will be created** alongside **all the actions** selected in the **Action set.**