Set email delegation and auto-forward to Manager

On-boarding, Off-boarding & Modifying · https://gatlabs.com/knowledge/tech-tips/set-email-delegation-and-auto-forward-to-manager/

Set email delegation and auto-forward to Manager

GAT Flow is a Google Workspace user management tool that's part of the GAT+ toolset.

It allows Google Workspace Admins to manage and manipulate multiple domain user accounts, whereby Admins can Onboard, Offboard, or Modify domain users.

One of the actions available for Onboard and Modify Flow is to **Set email delegation** and **auto-forwarding** to a **Manager**

The Manager will be pulled from **Users > Users information** in **the Google Workspace Admin console.**

Create workflow

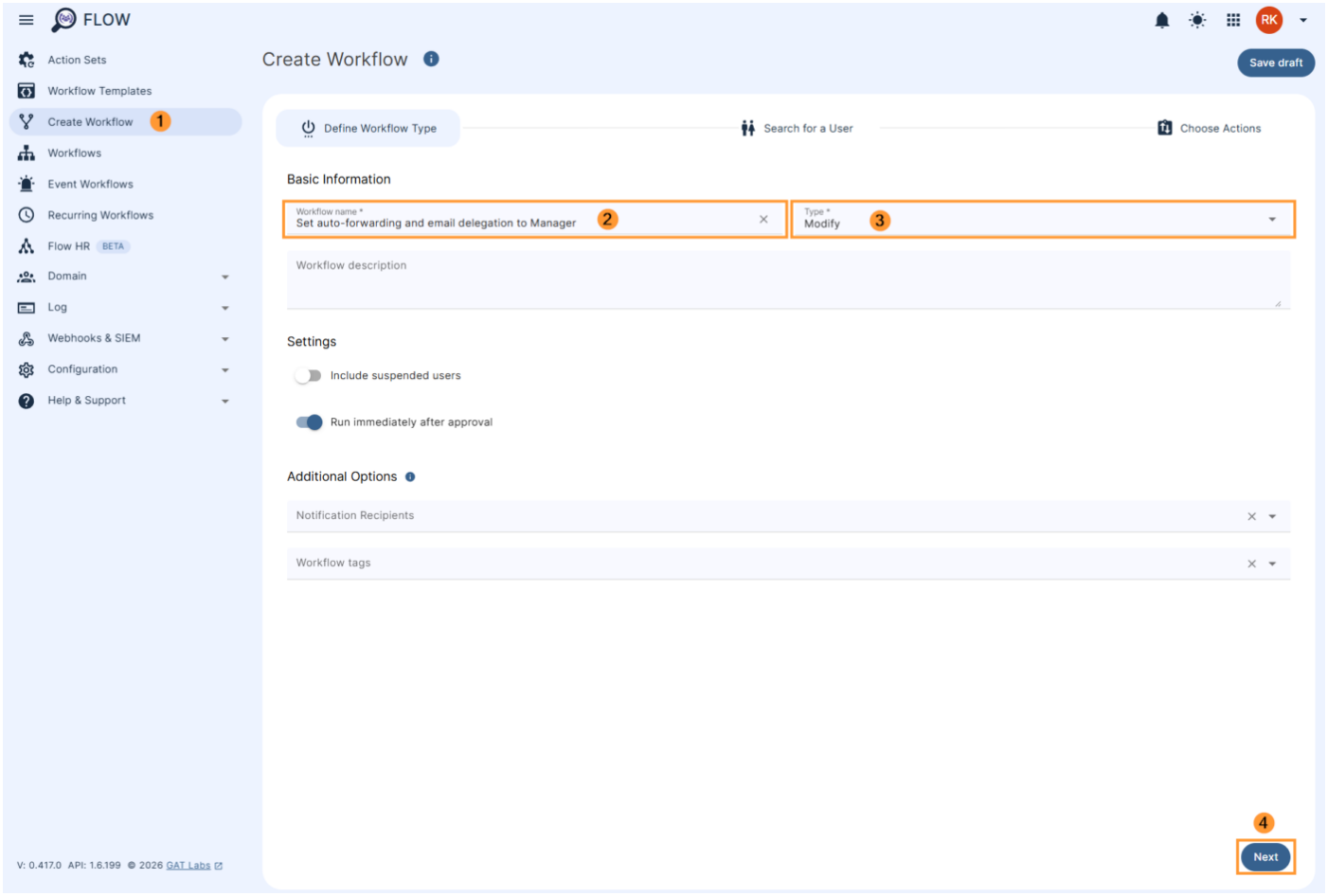
Navigate to **GAT Flow → Create workflow**

In the **Workflow** fill in the details for the workflow. You can set it up also as an **Event workflow** or **Recurring workflow.**

- **Name** – enter the name of the workflow (2)
- **Description** – enter a description for the workflow (optional)
- **Type** – select what workflow type you would like to run
  - **Modify** – modify existing users (3)
- **Include suspended users** – enable or disable to allow you to select users who are currently suspended:
  - If enabled – you will be able to select even users who are suspended
  - If disabled – you will be able to select only users who are active

- **Run immediately after approval** – provides an option to schedule the workflow to run in a selected future time (optional)

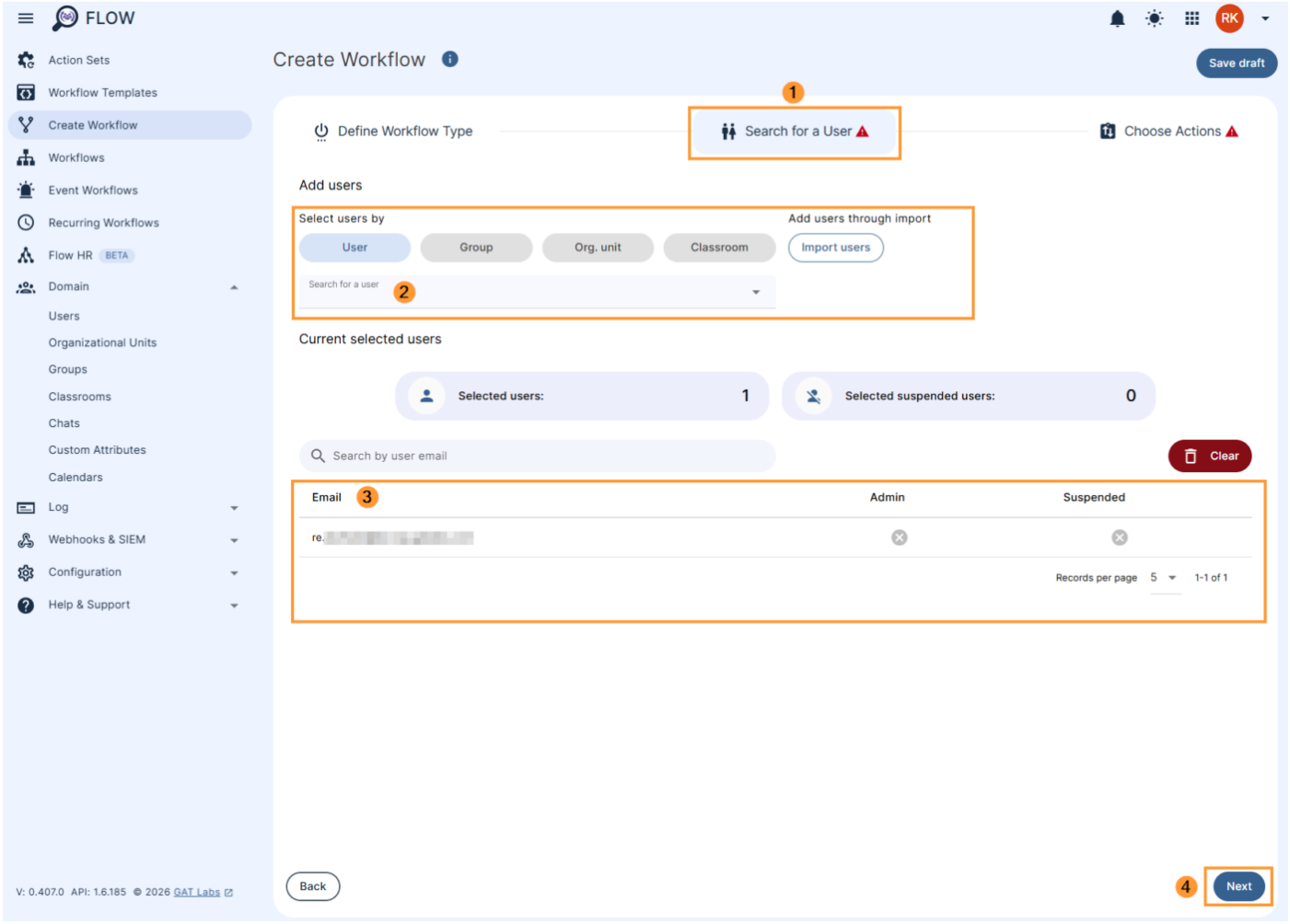
Later click **Next** (4) to proceed.



Select User(s)

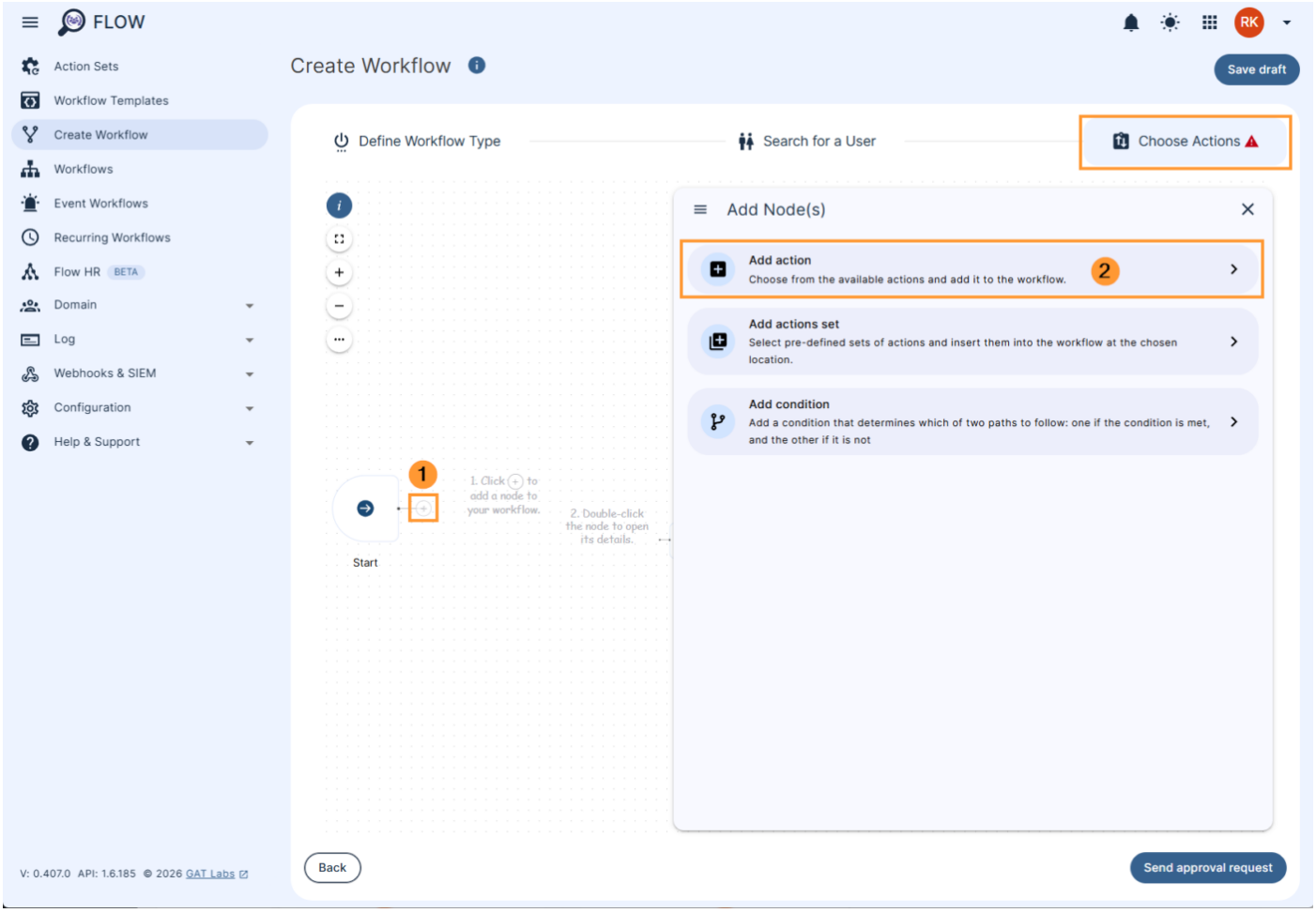
Pick the users to whom you want to set up Auto-forwarding and Email delegation

- **Enter user** by selecting a single user, group, or org. unit of users
- Select “**Next**” to proceed



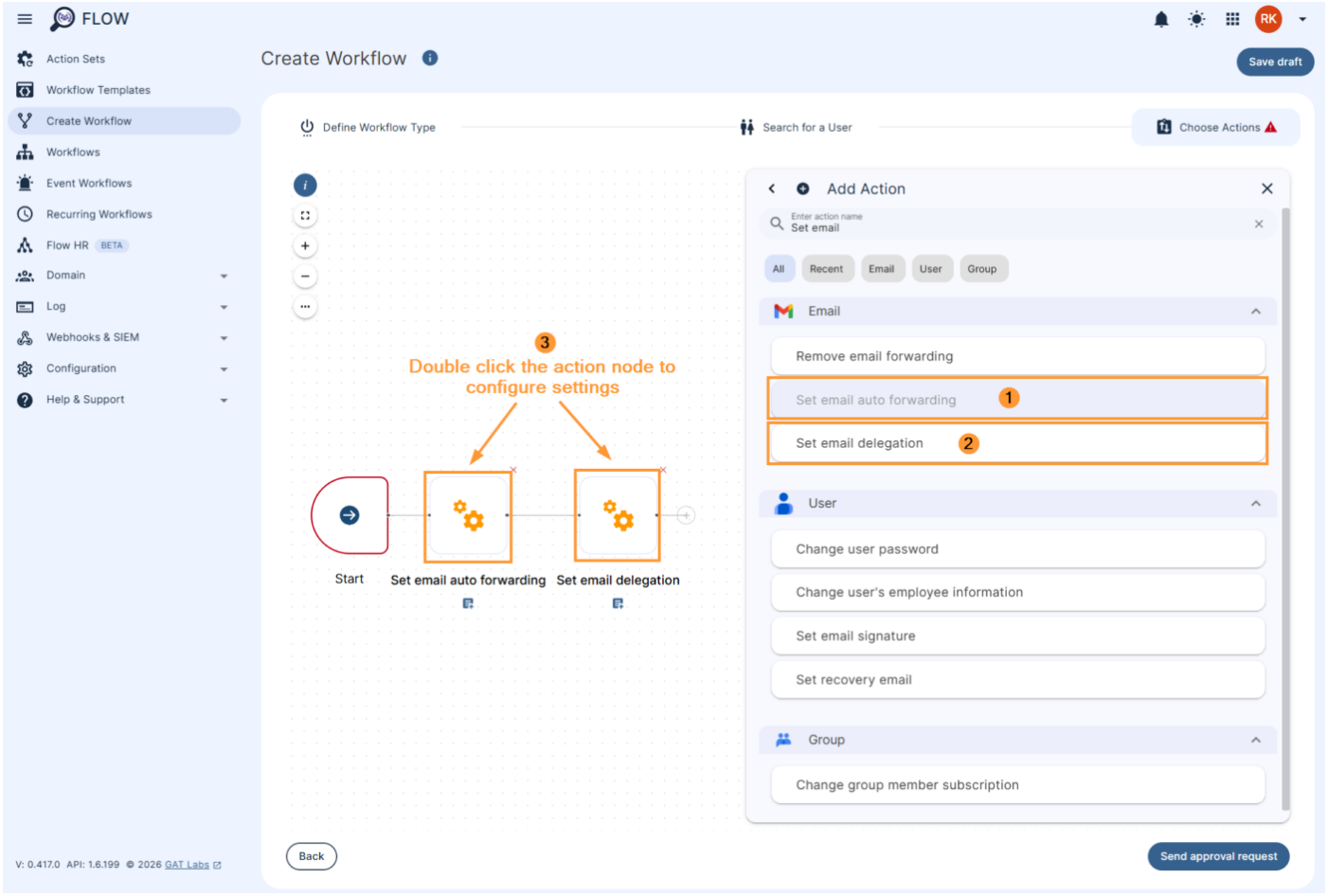
Choose Actions

In the **Choose actions** click on the **(+) button** (1) and then click the **Add action** button (2)



Select the actions from the displayed list:

- **Email → Set email auto-forwarding**
- **Email → Set email delegation**



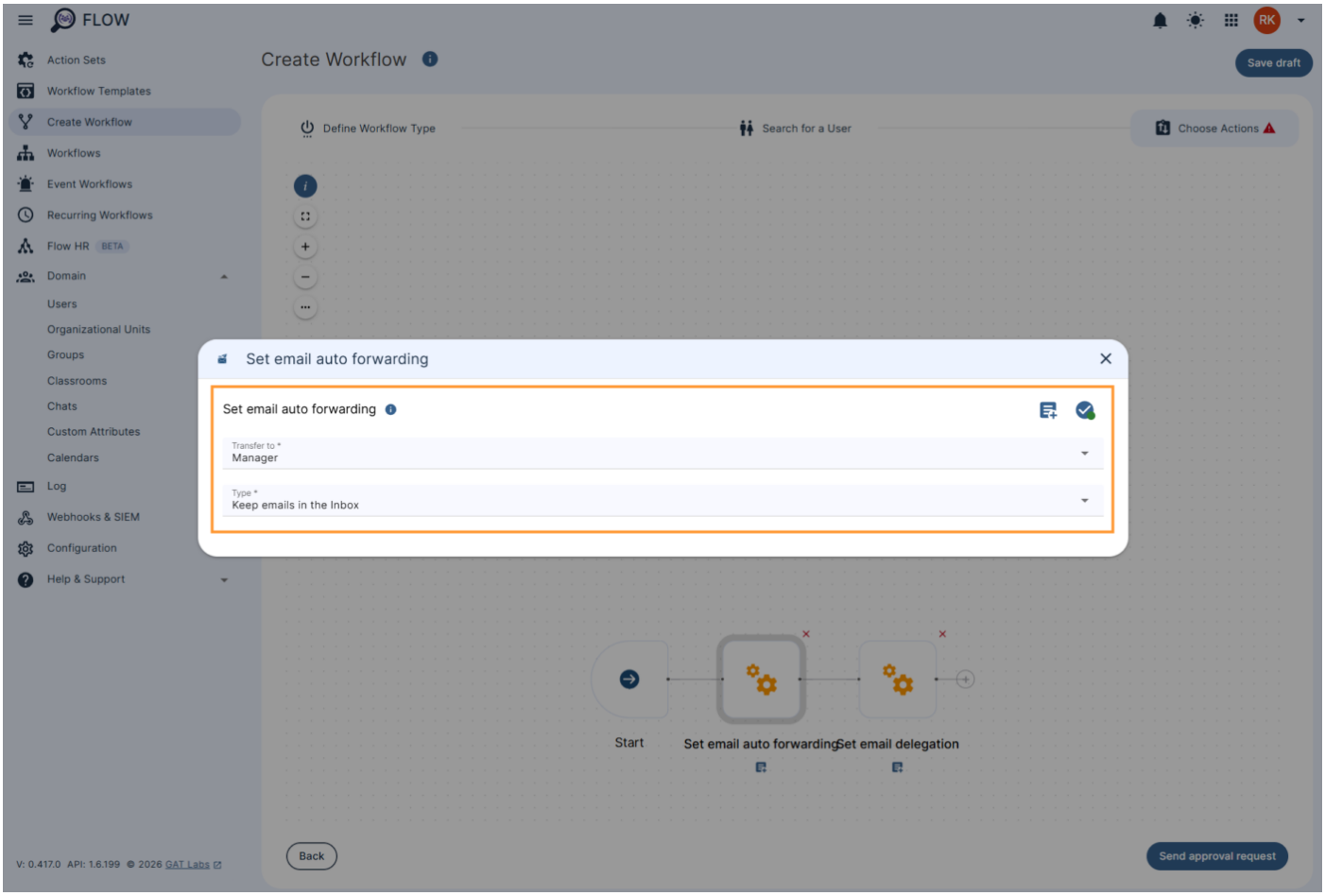
When the options are selected, the action nodes will be added to the workflow. You can double click the action node to configure the settings.

Fill in the required details.

Set Email auto-forwarding

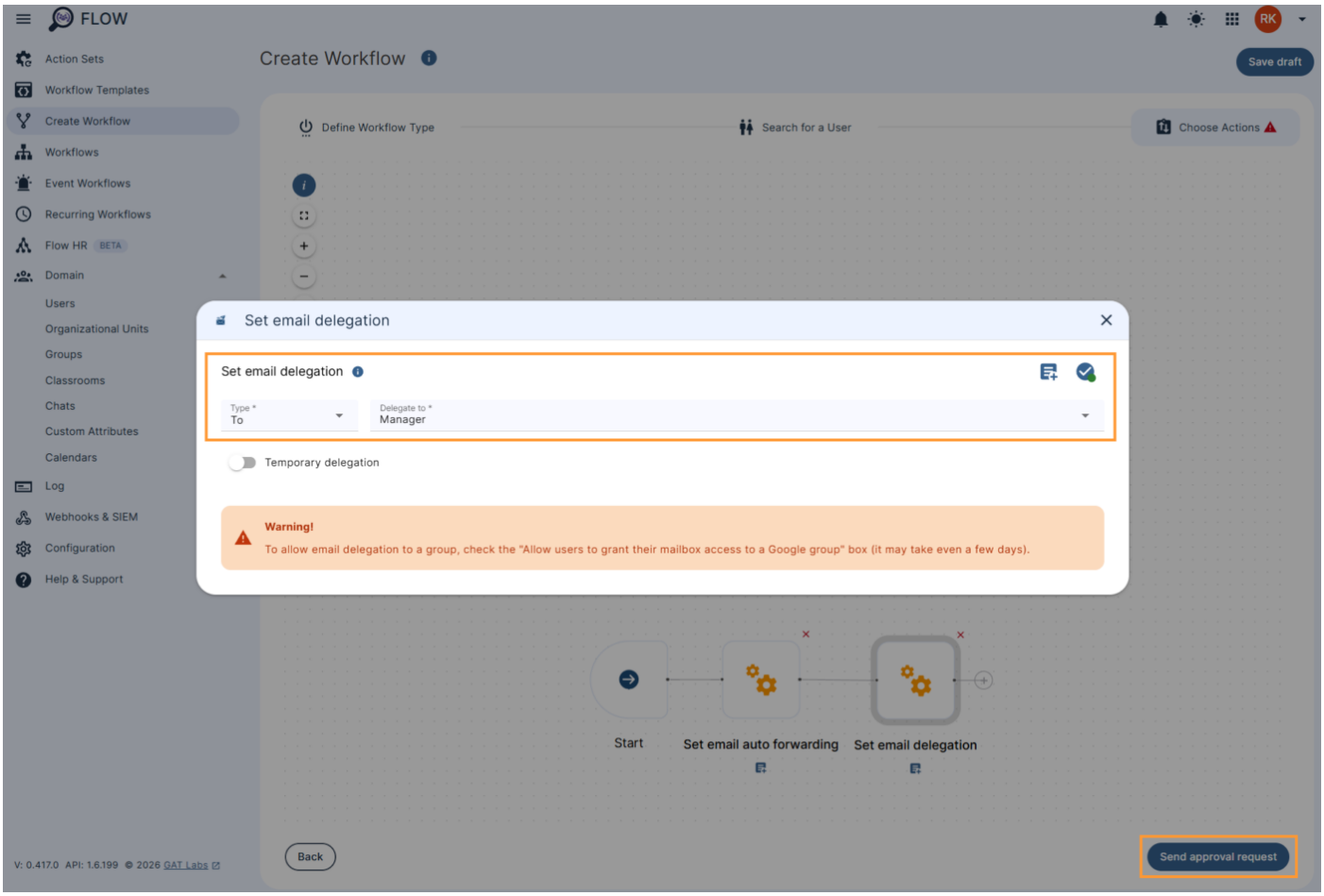
- **Transfer to** – **Manager**
  - This value is taken from the current attribute in **Users > Edit User > Contacts > Relations** in GAT Flow
- **Type** – select any of the options
  - Keep email in the inbox
  - Mark emails as read
  - Archive emails
  - Delete emails

This action will set up auto-forwards of emails to the Manager



Set Email delegation

- **Type -** select '**To**'
- **Delegate to – Manager**
  - This value is taken from the current attribute in **Users > Edit User > Contacts > Relations** in GAT Flow
- **Temporary delegation** – enable or disable temporary time
  - If enabled
    - Pick the hours active – for how long the Email delegation will be active
  - If disabled
    - The email delegation will be enabled permanently – until removed by user or Admin

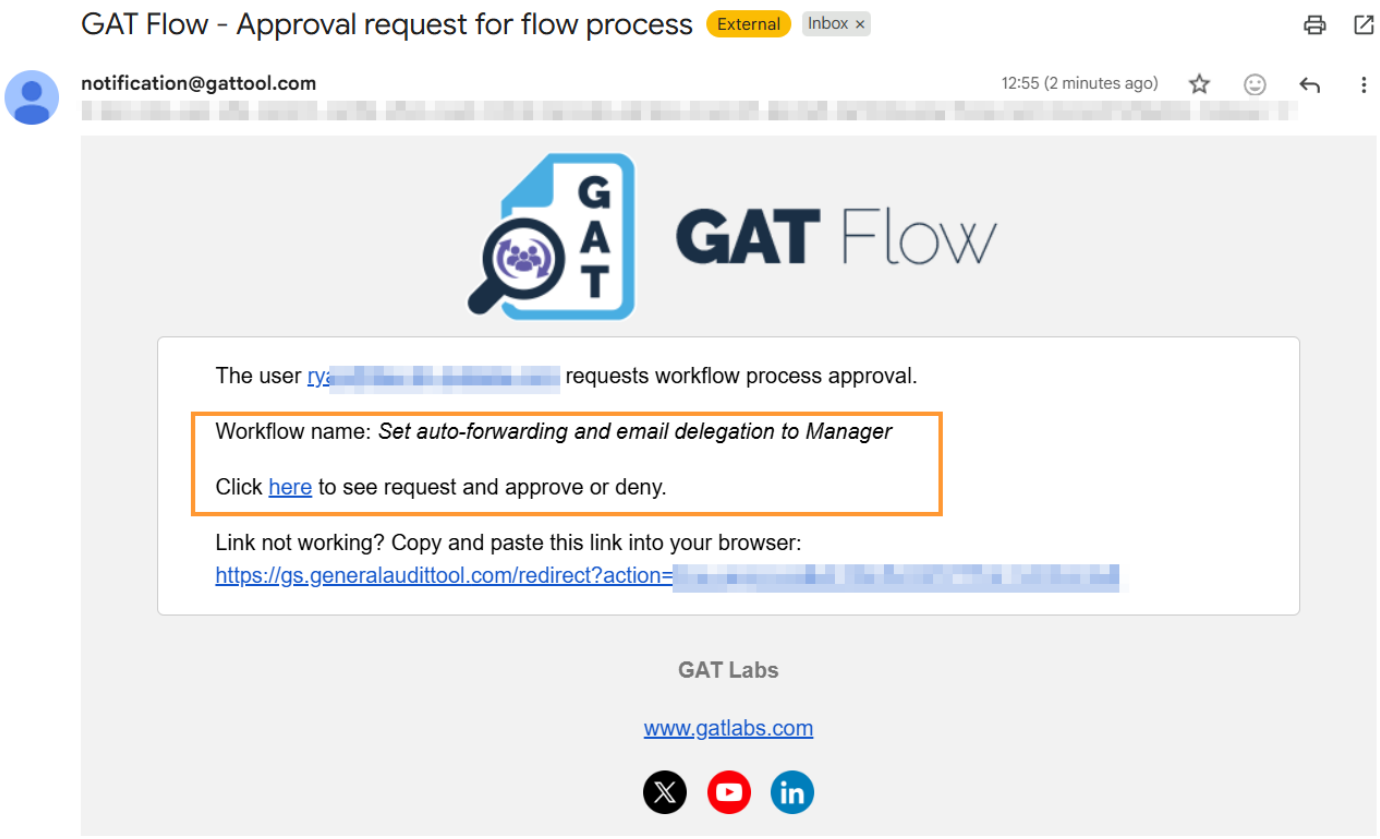


Changes made to the actions are saved automatically, you can click outside of the pop-up box or click the 'X' in the top right to continue. When the options are selected click on “**Send approval request**“.

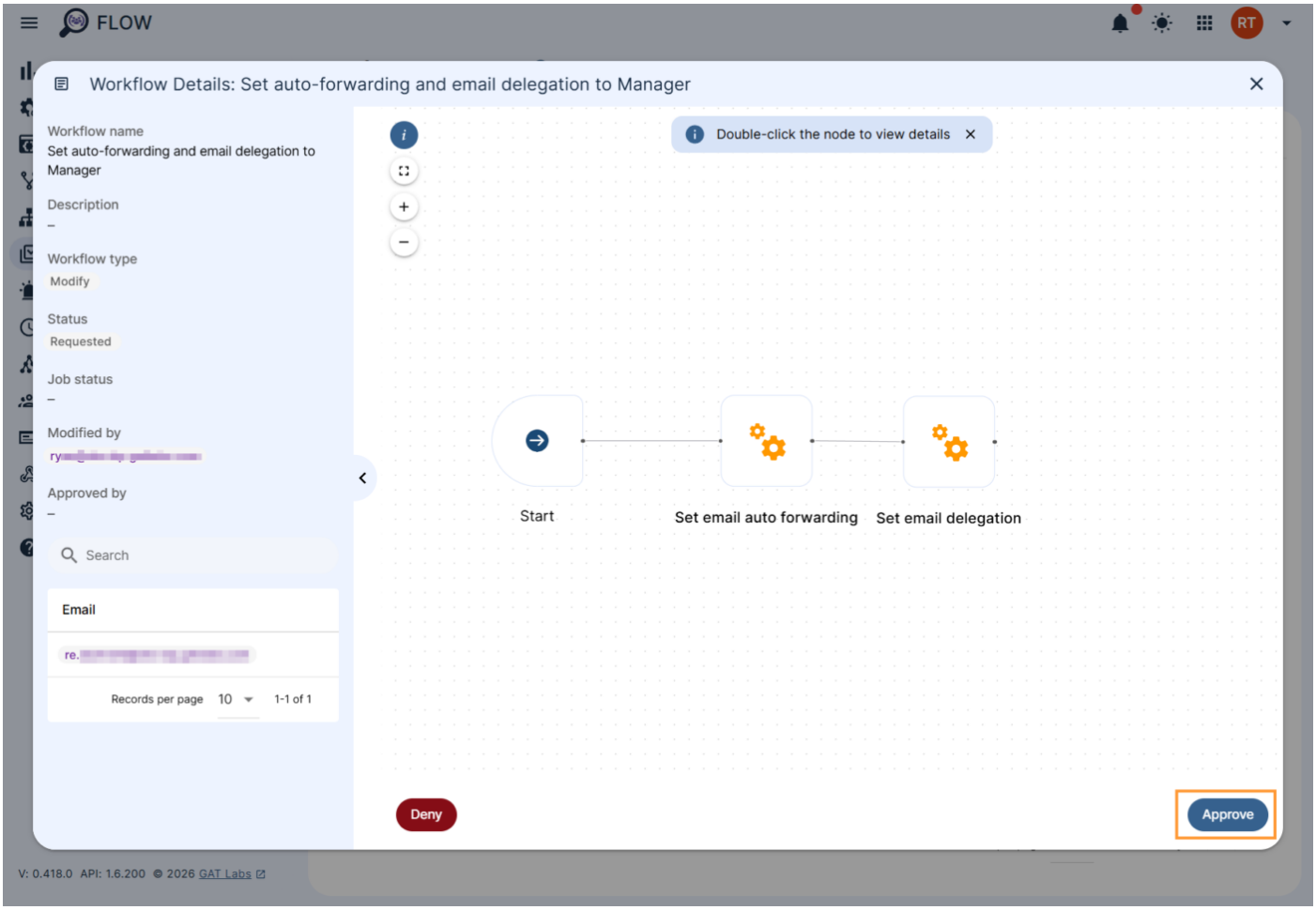
Security officer approval

When the request is sent for approval, the **Security officer** has to approve the request.

They will receive an email like below.



The officer will be navigated to **Flow → Workflow Approvals** where you can **approve** or **deny** the request.



Result

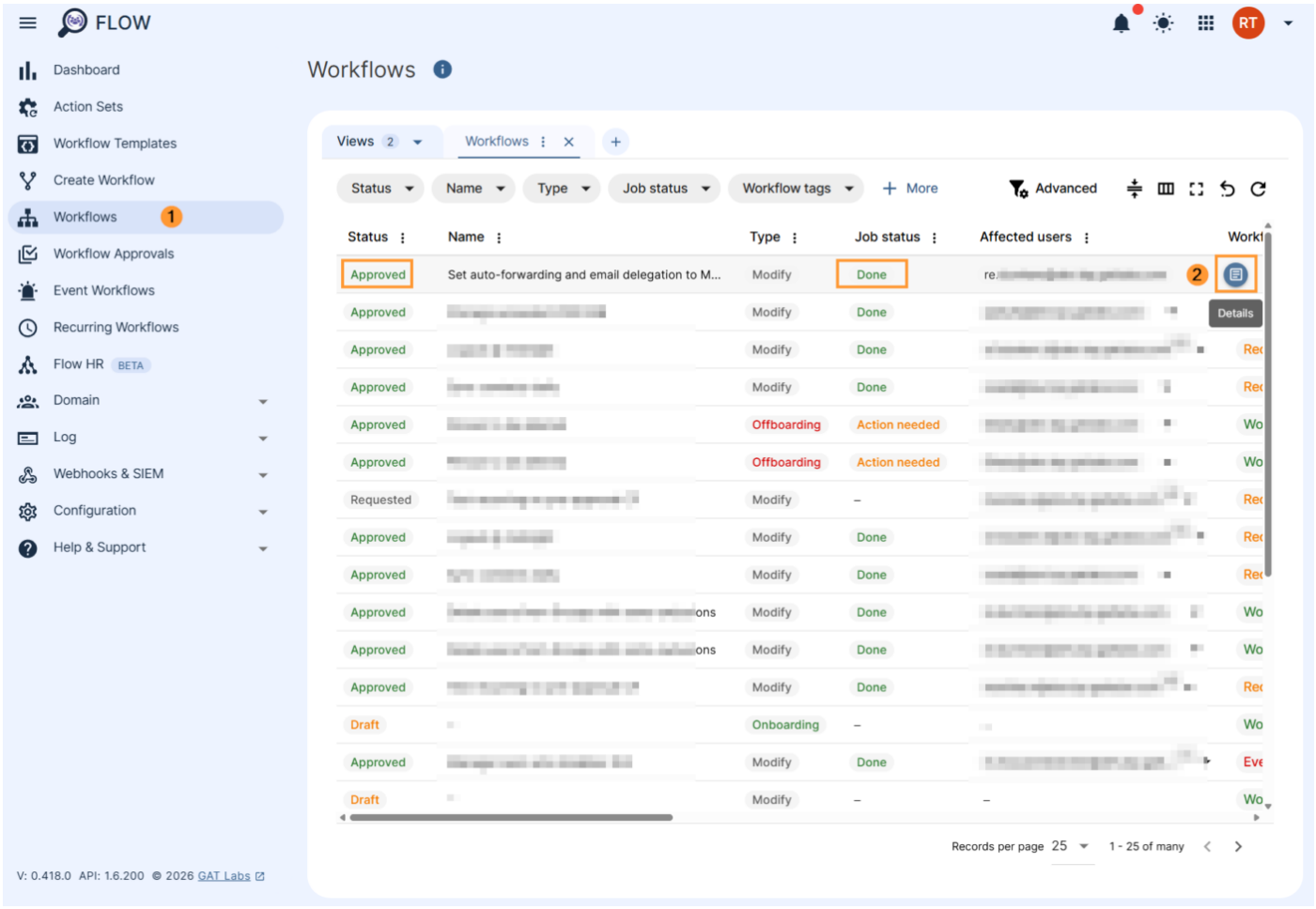
When approved, the **Workflow will be set and scheduled to run.**

The Managers of the selected users (Search for a user), will have auto-forward and email delegation enabled

The progress can be seen in the **Workflow** tab.

Under Job-status

- **Scheduled** – the job is requested and set to run
- **Done** – when the workflow has been completed
- **Partially done** – when it is partially completed
- **Error** – you can view the “error” from the “**page**” icon

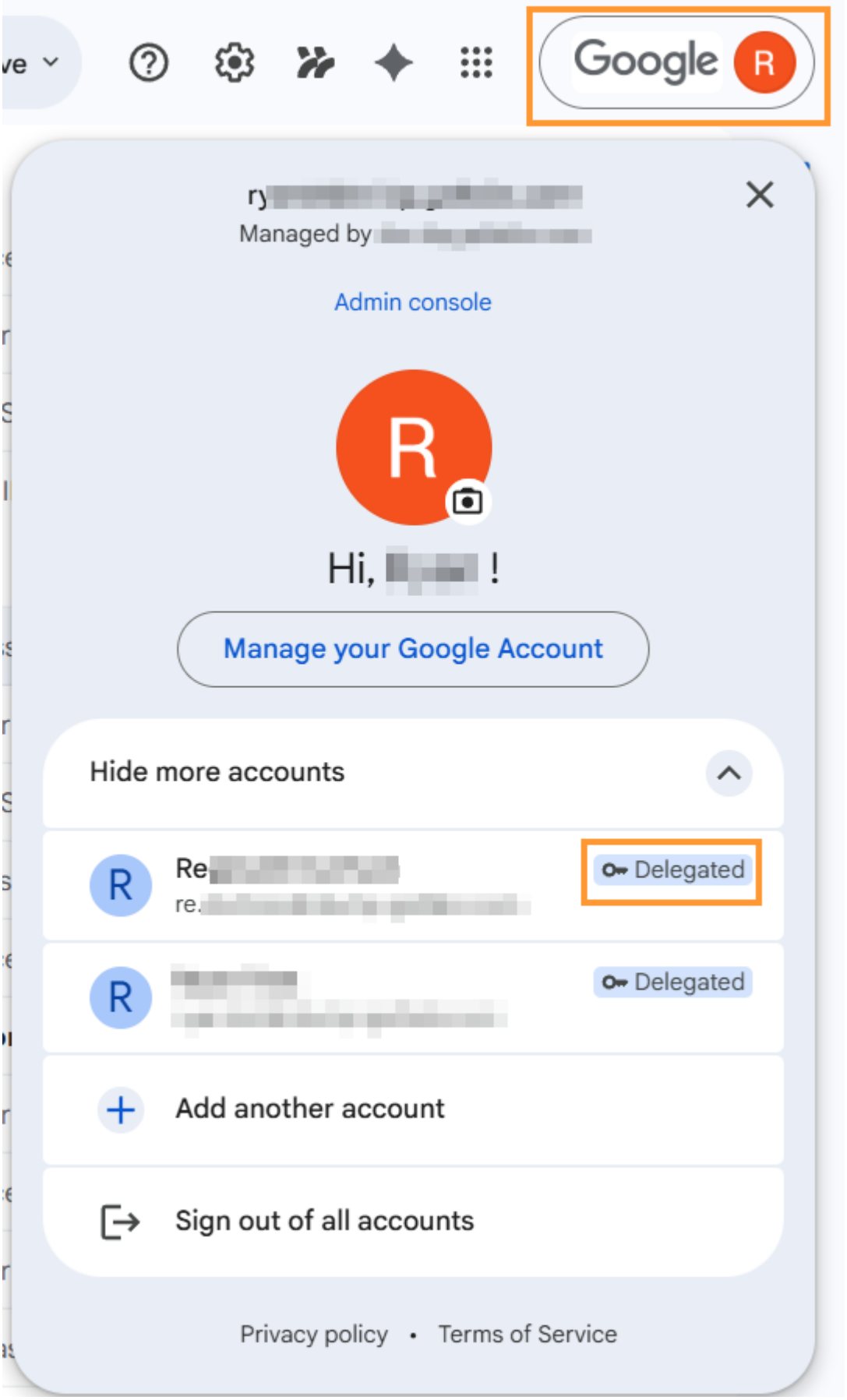


When approved and the job is done, you can see the status in the Workflow as **Done.**

The workflow is completed and the Managers of the selected workflow users will have Email delegation enabled and Auto-forward activated.

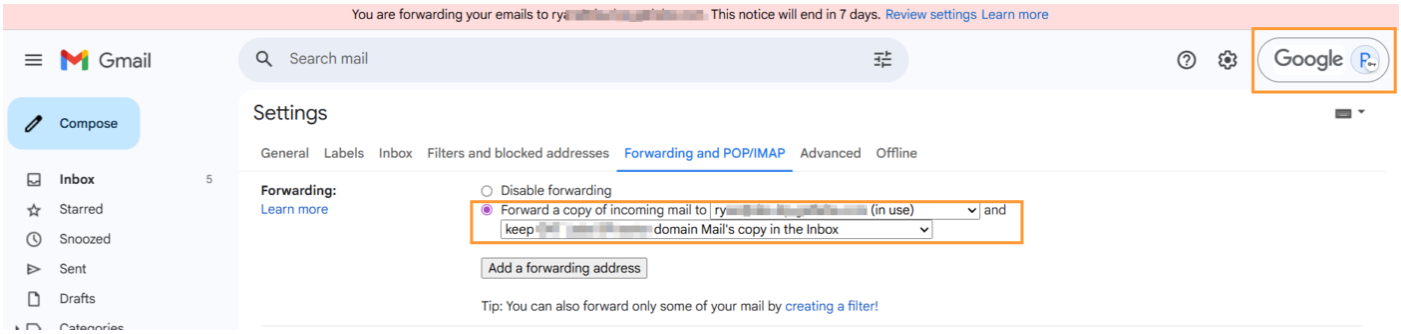
Result for Email delegation

The **Manager** will have **Email delegation** enabled over the selected users


Google R
Managed by
Admin console
R
Hi,
Manage your Google Account
Hide more accounts
R
Delegated
R
Delegated
Add another account
Sign out of all accounts
Privacy policy • Terms of Service

Result for auto-forwarding

The **Manager** will have **Auto-forwarding enabled** and emails sent to users will be **forwarded** to them



Result for Email delegation

Important Note: By default, email delegation is no longer silent to the account that has been delegated. The Gmail web application displays a banner warning to them when they visit their inbox, letting them know their account has been delegated.



If you would prefer that your end users did not see a warning like this, you can find out how to hide this warning for the your end users with GAT Shield here.