Set users manager in bulk

On-boarding, Off-boarding & Modifying · https://gatlabs.com/knowledge/tech-tips/set-users-manager-in-bulk/

Introduction

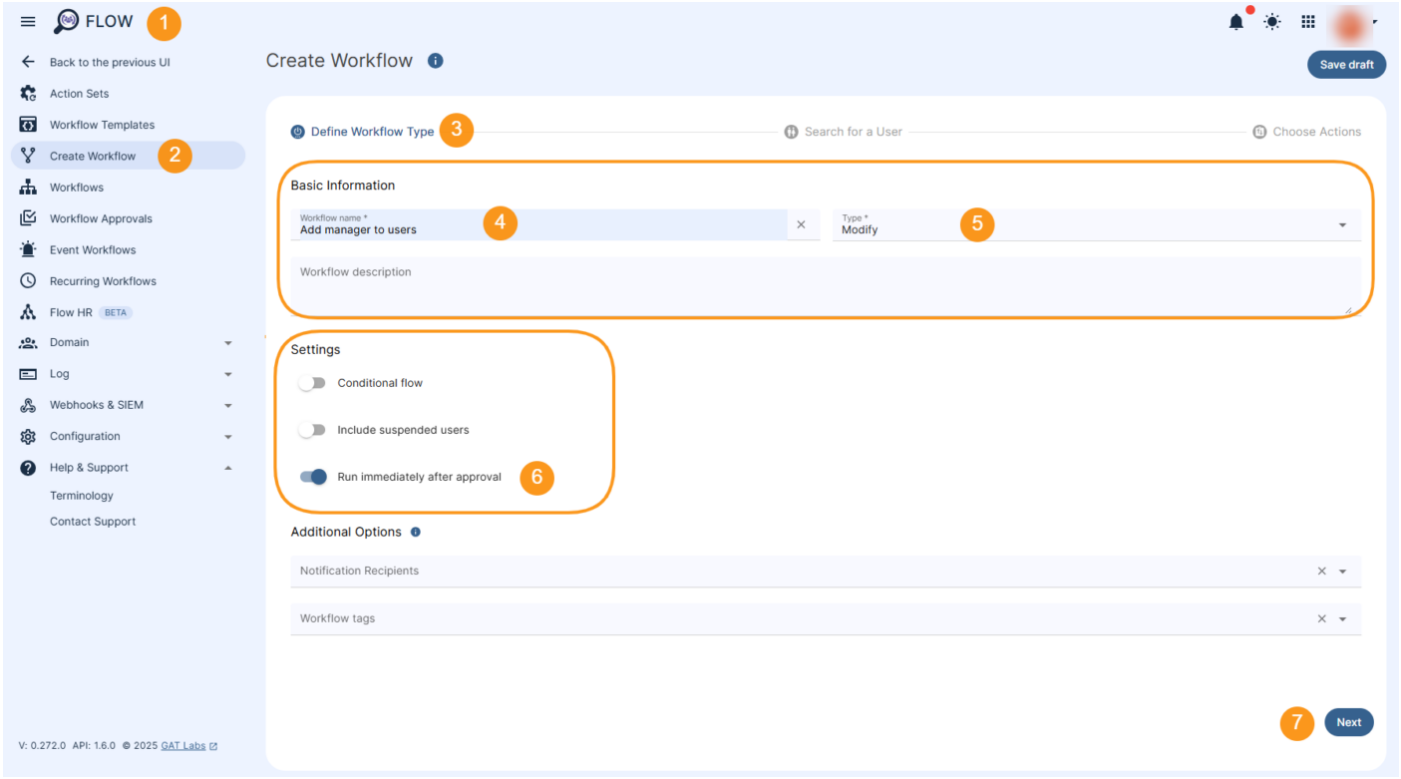
Within GAT Flow Google Workspace Admins and GAT Flow Delegated Auditors are able to **set users managers** in bulk.

Launch GAT Flow and navigate to the type of workflow you want to create. For this example, we will create a simple workflow.

Define Workflow Type

Navigate to **Create workflow** section of GAT Flow. Under **Define Workflow Type** section, enter the workflow **Basic Information** as follows:

- **Workflow name** – enter a name for the workflow
- **Workflow description** (optional)- enter a description of the workflow
- **Type** – select the workflow type
  - **Modify** OR **Onboarding**– **Modify** users OR Onboard users
- **Run immediately after approval** (selected by default) – pick up a date when the workflow is to run if applicable. More details here
- **Next** – click on the button to proceed

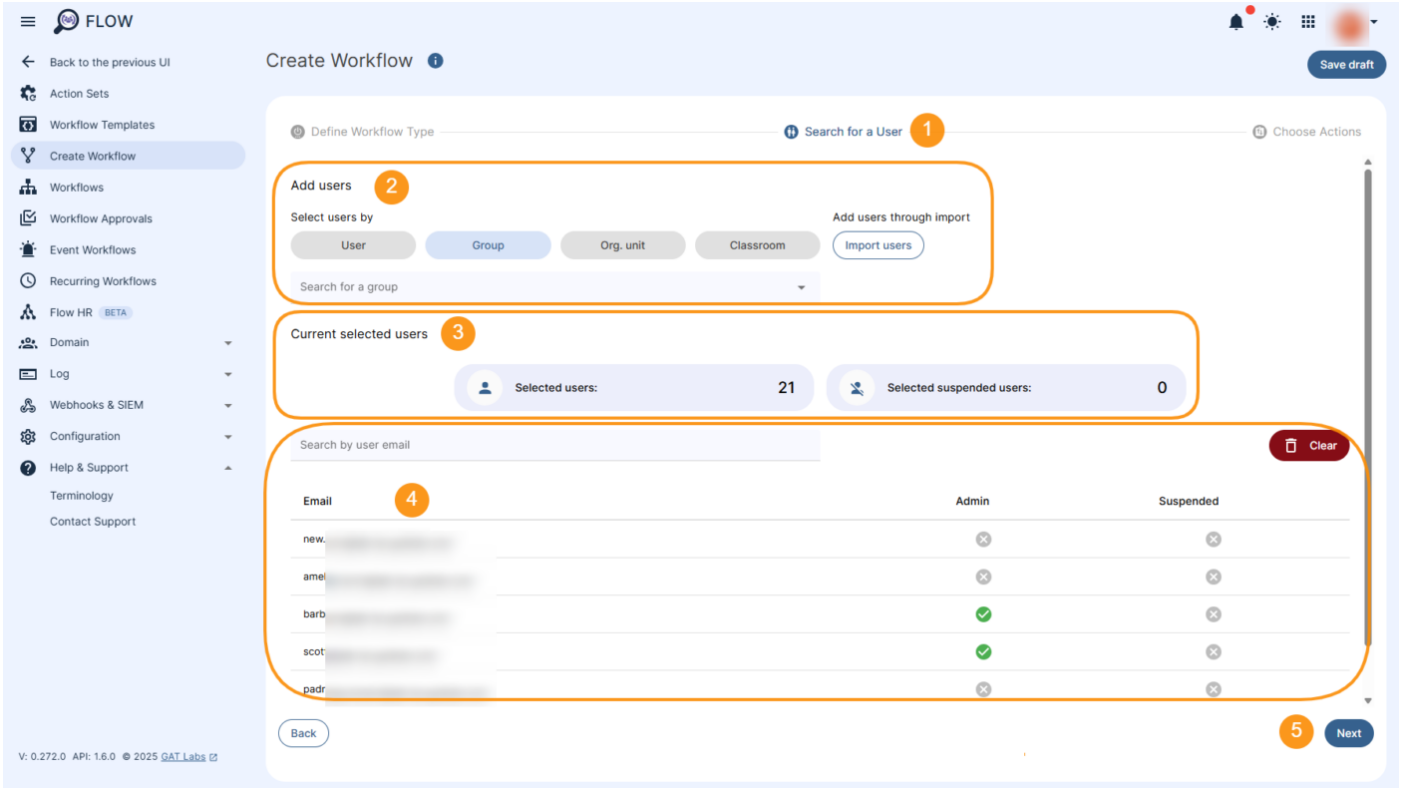


Search for a User

Search for a User – select the users to be added to the workflow. Under the **Add user** section there are the following options to use:

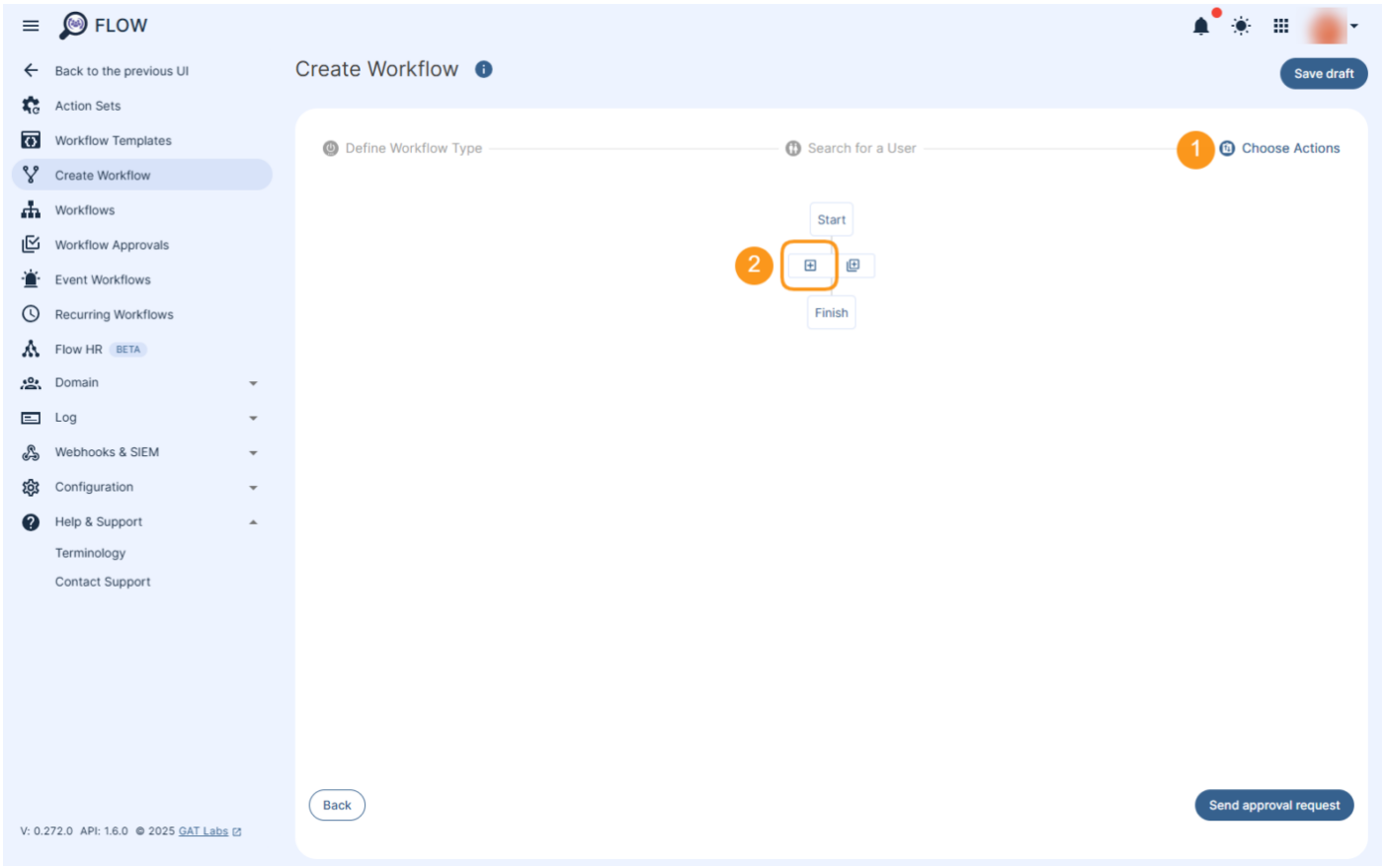
Select user by:

- **User** – Search and select individual user(s)
- **Group** – Search and select a Group of users
- **Org. unit** – Search and select Org. Unit of users
- **Classroom** – Search and select Classroom
- **Import users** – add users through import



Choose Actions

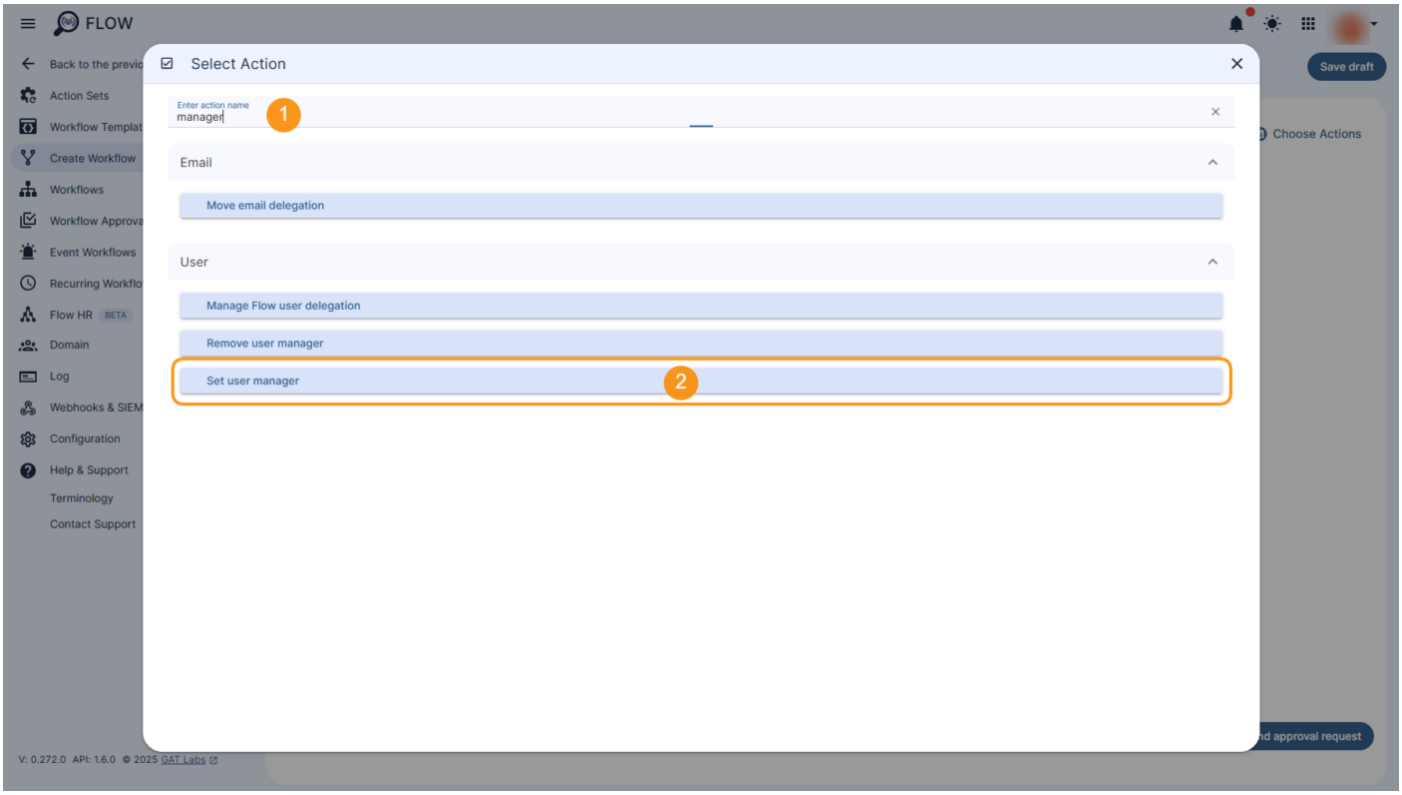
Choose Actions – set up the workflow actions by clicking on the "**+**" button on the left side of the workflow diagram to **Add action.**



All the options available for **Modify OR Onboarding type of workflow** will be displayed.

Utilize a quick search option and type the keyword that allows for quick action return, e.g. “*manager”.*

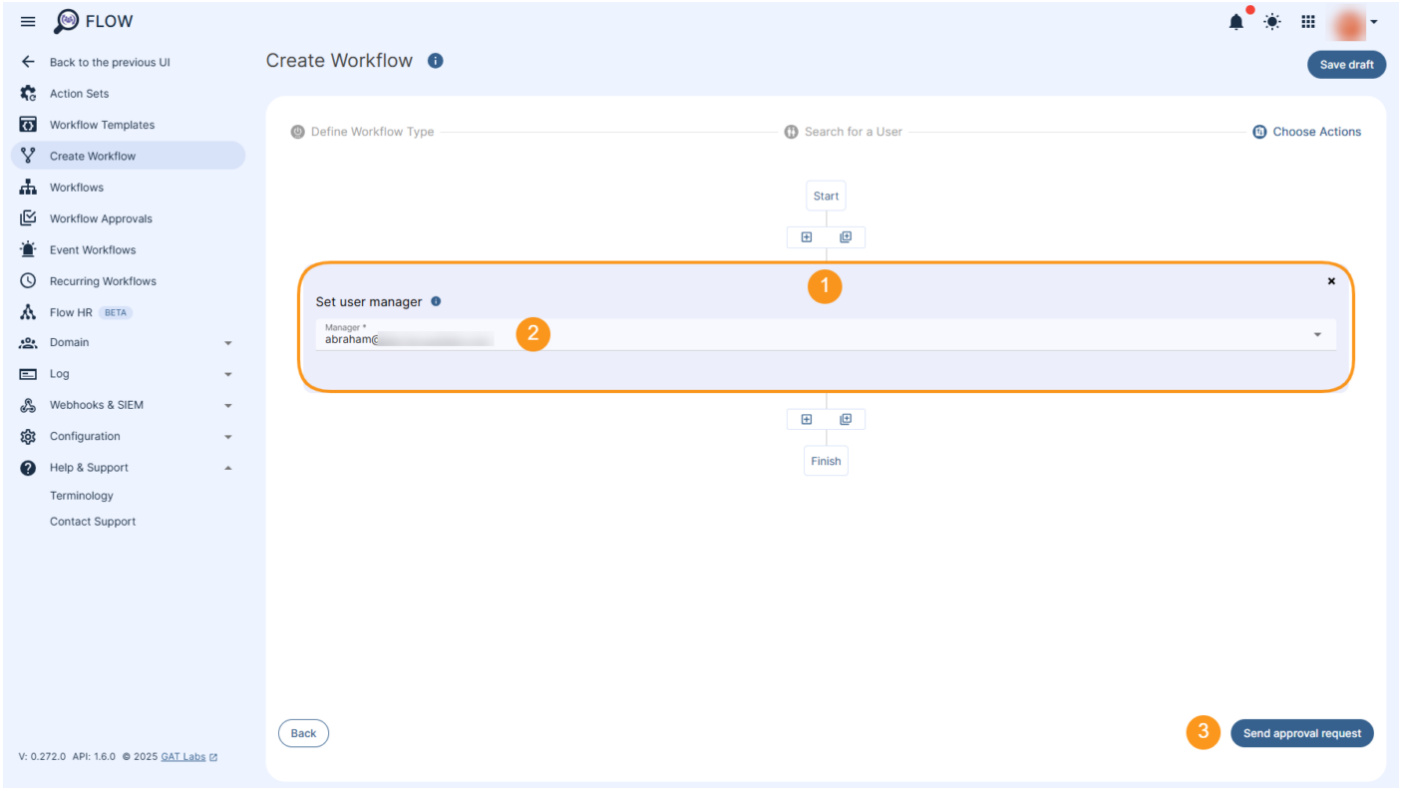
Select **Set user manager** action.



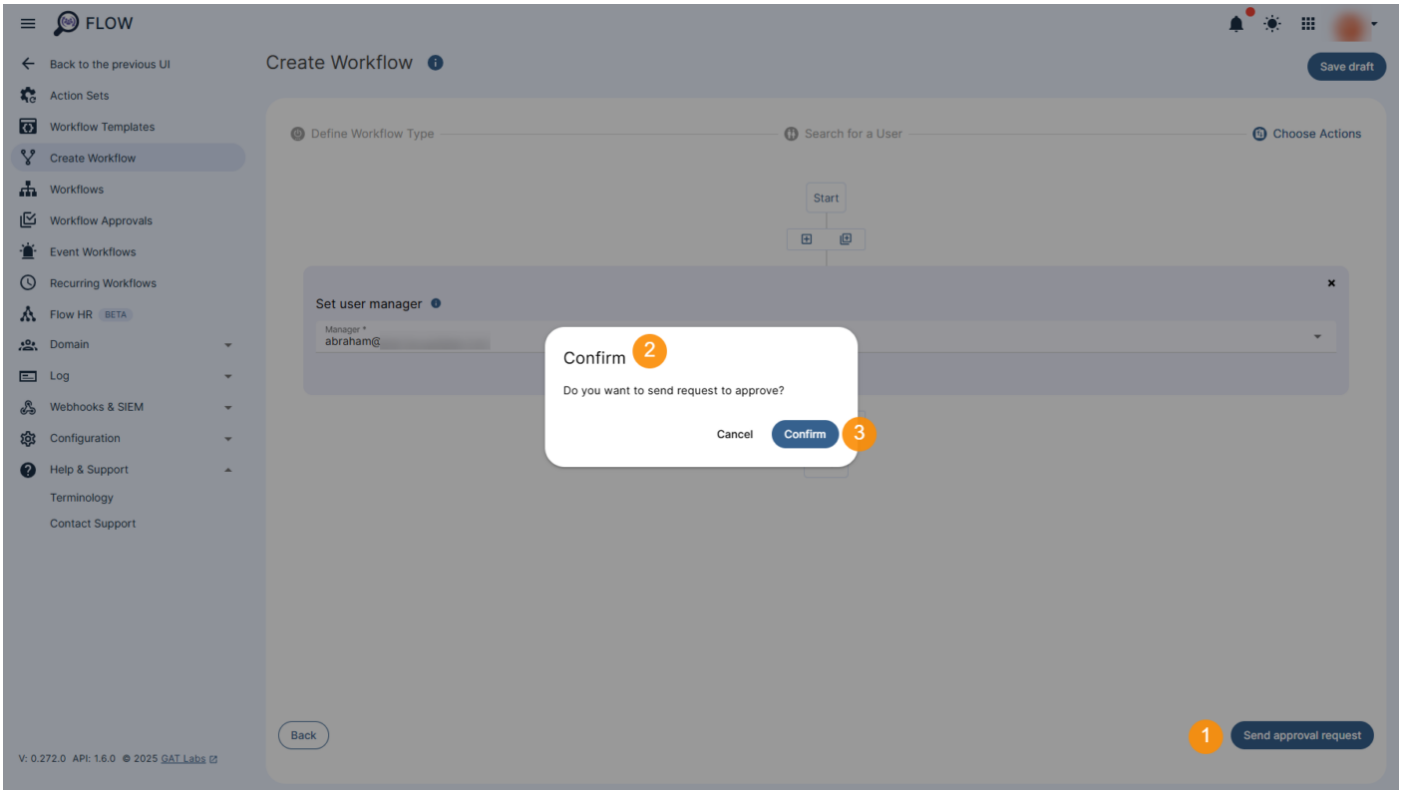
The action will be added to the workflow.

Set the users **Manager** by selecting the one form the drop down list.

Once ready, click on **Send approval request** button to send the workflow to the Security Officer for verification.

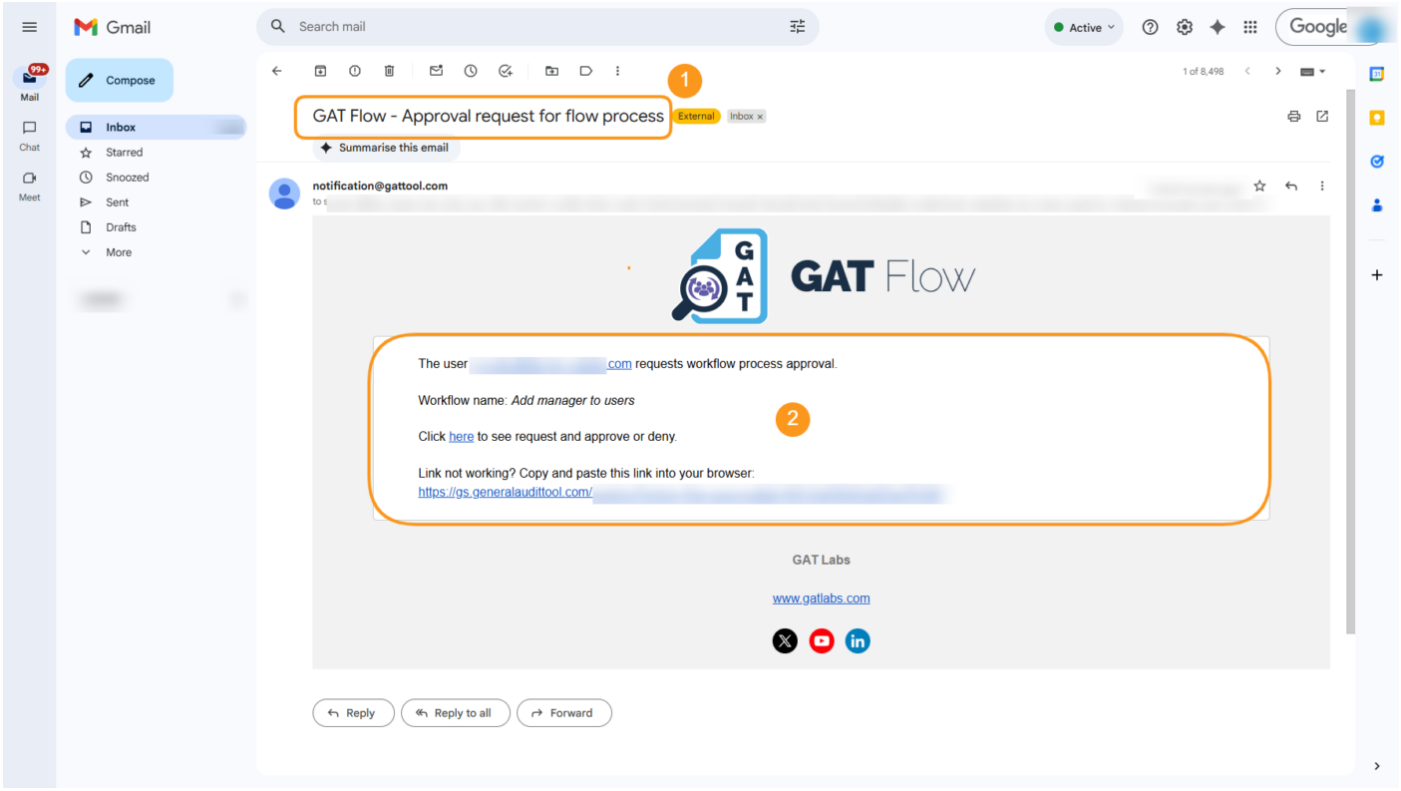


A pop-up window will be displayed where it can be confirmed to proceed with the request.



Note: If you have pre-approval enabled you can proceed without an approval email. More details can be found here

The request will be sent to the **Security Officer** for approval.



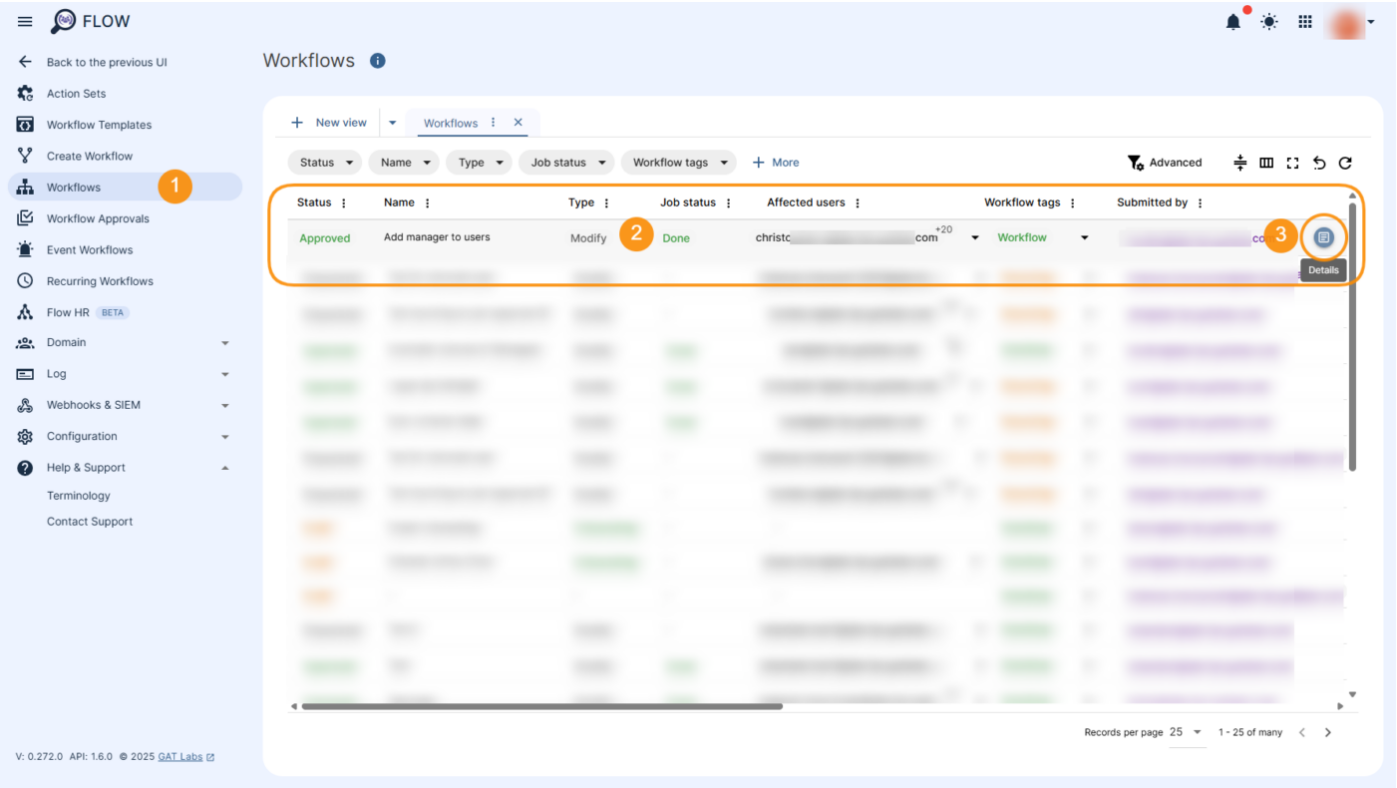
The Security Officer **can review and approve or deny the workflow.**

Once approved, the workflow will run, and the selected Manager will be assigned to all users selected to this workflow.

Results

To review the status of the workflow and see its details, navigate to **Workflows** and find the relevant workflow in a table.

Click on **Detail** icon to see more details.

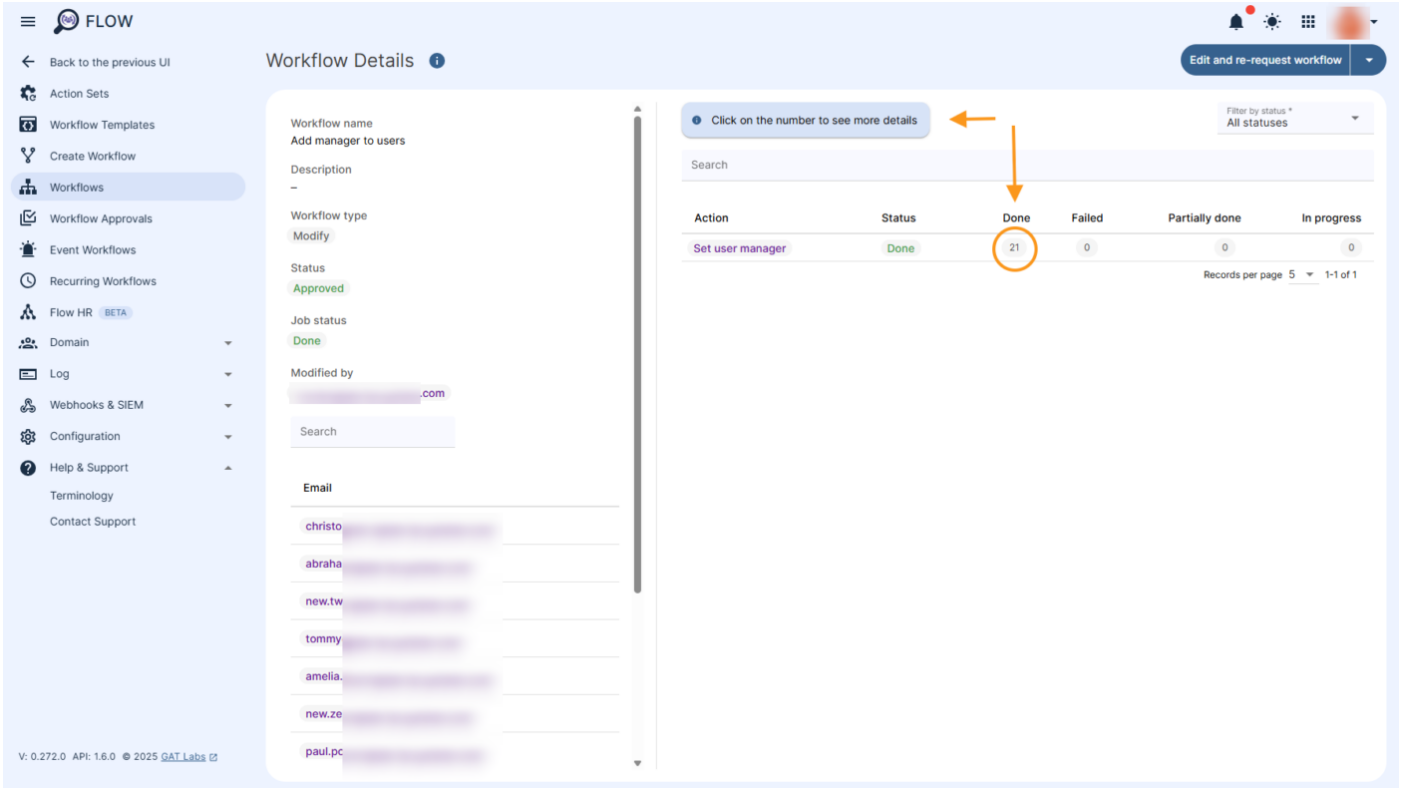


The **Status** of the request can be as follows:

- **Requested** – send to Security officer for approval
- **Approved** – the Security Officer has approved the request
- **Job status** – will show the status of the current workflow job
  - Scheduled – when is set to run
  - Done – when the workflow has been completed
  - Partially done – when completed partially
    - Eye icon – click on the eye icon to view more details

- **Details icon** – the icon on the right side of the workflow will show all details for the Flow request
  - **Save as action set** – save the Workflow as an action set for easy later use
  - **Edit** – edit the workflow and apply changes

The **Workflow Details** section allows you to drill down into the workflow by clicking the number under each status column, such as “Done” (shown below), to view more details



The action is now executed and the Manager is set for the selected users. This can be verified via the admin.google.com console.

