



## Rollup Subitems

[Click here for a full instruction video](#)

### Introduction

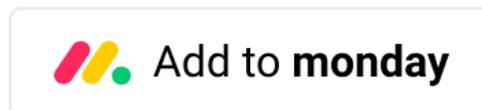
Rollup Subitems rolls up information from subitem columns to a column in the parent item. The column in the subitems is a normal monday.com column (not a mirror) and can be used in other automations. With filtering you can limit which subitems should be taken into account.

The Rollup Subitems app is developed by monday.com power users and is available on the monday.com marketplace. When downloaded from the marketplace the app is installed in trial mode (10 days) and can be unlocked through the [Excellent Team](#) shop at any time.

You can skip to:

- [Installation](#)
- [Authorize the app](#)
- [Configuration](#)
- [The recipes](#)
- [Filtering](#)
- [Usage](#)
- [Notifications](#)

### Installation



By clicking the image above you add this app to your monday.com account. In case you have multiple accounts, please select the correct account in the upper right corner. During the installation you are asked to authorize the app (see section below).

After installation of the Excellent Team app into your monday.com account you can add the app recipe(s) to your boards. You do this by clicking the integrations and find the monday.com app you are interested in.

## Authorize the app

During the installation of the app in your monday.com account the required permissions (scope) for this app were shown. The app does not store user access tokens but the monday.com platform will grant the permissions shown during the installation for 60 seconds to the app. All actions will be performed with the user credentials of the user that installed the app.

Install **<<App Name>>** in your account  
The app will be available to all users in your account



On monday.com, **<<App Name>>** would like to:

Read all of your boards data	The requested permissions (scope) may differ for different apps
Modify any of your boards' data	
Send notifications on your behalf	
Create and modify webhooks	

Cancel

Install

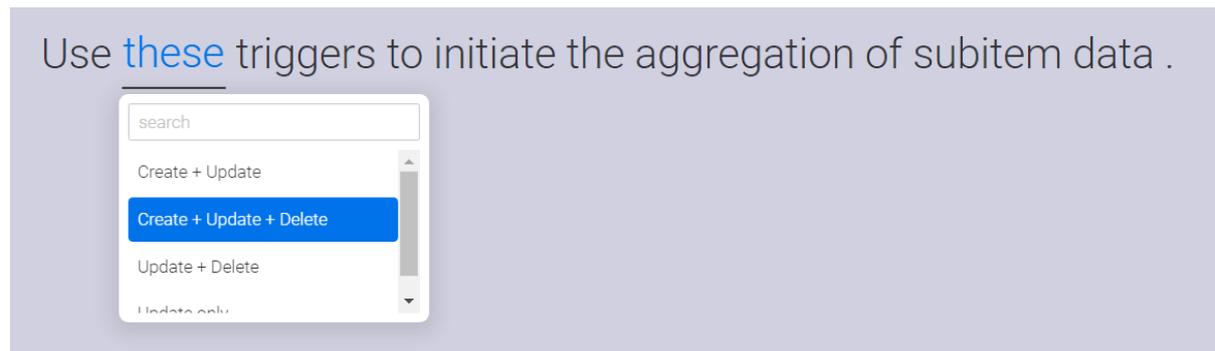
## Configuration

After successful installation of the app you need to add the integration(s) to your board.

**Pre-requisite:** you need to add the integration that defines which triggers on subitems to use first on any board using this app.

**Pre-requisite:** your board needs to have at least one subitem otherwise the creation of the triggers will fail with a notification “You need to have at least one subitem on your board before you can use the Rollup Subitems app.”.

The integration that defines the triggers has only one field to fill in.

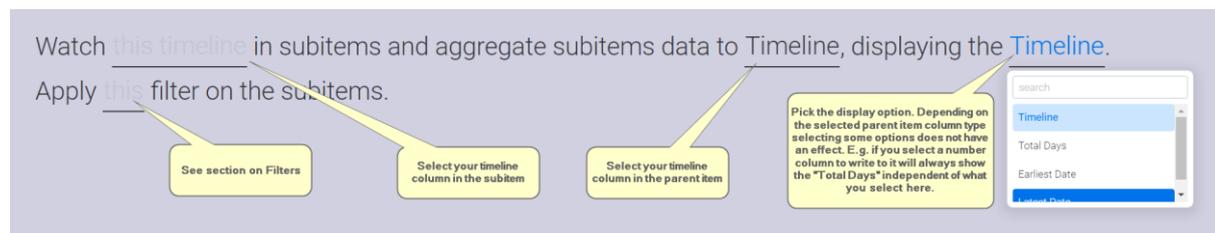


You have several options to define which triggers to use. The “Delete” trigger will recognize when subitems are deleted or archived.

You are now ready to add the “Watch recipes”.

## The recipes

For each supported column type there is at least one “Watch” integration recipe. With those “Watch” recipes you define which column in the subitems should be aggregated to which column in the parent item. Some of these recipe can write to different parent item column types, the format used to write the aggregated data depends on the selected parent item column type. Below is an example of the “Watch recipe” for a timeline column.



**Warning:** depending on the selected parent item column type selecting some options does not have an effect. E.g. if you select a number column to write to it will always show the "Total Days" independent of what you select here.

Some “Watch” recipes also allows you to select a specific format. The table below shows all supported parent item column type for each of the subitem column types.

Subitem column type	Parent item column type	Supported options
Number	Number	Sum, Average, Min, Max
Timeline	Timeline	Timeline
	Date	Earliest date, Latest date
	Number	Total days
Date	Date	Earliest date, Latest date
	Timeline	Timeline
People	People	People
	Dropdown	People
	Number	Count distinct, Count empty
Time tracker	Number	Sum, Average, Min, Max (in decimal format)
	Text	Sum, Average, Min, Max (in different formats)
Status (one status value)	Number	Number [0-100]
	Text	Percent, Percent (state), X of Y (State), Number [0-100]
Status to RAG	See below	

### *The status column and RAG*

Rolling up a status column shows only one status value (state) per parent column. You can have multiple parent columns and multiple integration recipes to show the percentage of different status values (states) in different parent columns.

There are two recipes that watches subitems status columns and set a parent item status column to either of the three defined statuses. This is often referred to as a Red-Amber-Green (RAG) traffic light system.

In the first RAG integration you define (in order of the integration recipe):

- The subitem status column to watch
- The parent item status column to set
- Status value (parent status column) for “high”
- Number (minimum) when to set “high” value
- Status value (parent status column) for “medium”
- Status value (parent status column) for “low”
- Number (maximum) when to set “low” value
- Status value to look for in the subitem status column
- Count or Percentage

Watch Status in subitems and set Health where: Good >= 80 / Bad / Ugly <= 20 of Done (as Count).  
Apply None filter on the subitems.

In this example the parent item columns is set to Good when minimum 80 percent of the subitems are Done and it is set to Ugly when less than 20% is Done. Everything between 20% and 80% will shows Bad in the parent item.

The second RAG integration is using a little different approach, it checks the condition from left to right. You define (in order of the integration recipe):

- The subitem status column to watch
- The parent item status column to set
- 
- Status value (parent status column) for “high”
- Number (minimum) when to set “high” value
- Status value (subitem) to look for to check “high”
- 
- Status value (parent status column) for “medium”
- Number (minimum) when to set “medium” value
- Status value (subitem) to look for to check “medium”
- 
- Status value (parent status column) for “low”
- Count or Percentage

Watch Status and set Health where: Ugly >= 20 of Stuck / Bad >= 20 of Late and Good otherwise, using the Percentage of the labels. Apply None filter on the subitems.

In this example the parent item columns is set to Ugly when minimum 20% of the subitems are Stuck. If that is not the case the parent item columns is set to Bad when minimum 20% is Late. In all other cases the parent item columns is set to Good.

## Filtering

By default the app aggregates the information of all subitems to its parent columns. You can define filters(s) to control which subitems' information is used to set the value in the parent item columns. All the “Watch” recipes can be filtered by the saved filter(s) you create.

To create a filter you need to have a dropdown (column type: dropdown) in your subitems. Now you can use the integration recipe:

Create a named filter by comparing this CSV list to Month .

Jan, Feb, Mar

You define (in order of the integration recipe):

- A name, for example “Quarter 1”
- A comma separated list (CSV) of values, in this example Jan, Feb, Mar
- A dropdown column in your subitems

Now, if you want to see the total costs for all subitems create a “Watch number” to aggregate to a parent item column (All costs) and set filter to “None”. You can add a second integration watching the same number column and aggregate to a column “Q1 costs” and select the named filter “Quarter 1” as the filter. See example board below.

<input type="checkbox"/>	Item	Person	Status	Date	Timeline	Total costs	Q1 Costs
<input type="checkbox"/>	Item 1 5					1,250	600

<input type="checkbox"/>	Subitems	Owner	Status	Date	Timeline	Costs	Month
<input type="checkbox"/>	Sub item 1					100	Jan
<input type="checkbox"/>	Sub item 2					150	
<input type="checkbox"/>	Sub item 3					200	Feb
<input type="checkbox"/>	Sub item 4					300	Feb
<input type="checkbox"/>	Sub item 5					500	

Changing the dropdown labels in the subitems will change the values in the parent item column if needed (e.g. changing a value and/or changing the dropdown “Month”). The filter compares the values in the CSV list to the values in the selected dropdown (case sensitive).

You can proceed the comma-separated (CSV) list with the directive ANY: or ALL:. If not specified the app assumes ANY: and will pass all subitems that has at least one of the given values in the dropdown. When you specify ALL: (e.g. ALL: Reg, Green) only subitems that has all values (e.g. Red AND Green) in their dropdown will be taken into account.

## Usage

On first use of the feature you will be granted a 10-day trial period, unless you purchased the Excellent Team app in the shop. If you want to use the feature after this trial period you can purchase the feature in the [Excellent Team](#) shop. After purchasing the feature it will be available immediately and if you already configured the feature you will not lose your configuration.

The feature is fully functional in trial mode. You will receive a notification in monday.com that show that the feature is in trial mode. A few days before the end of the 10 day trial period you will receive another notification. The feature stops working after the trial period is passed and you can safely remove the feature from your board(s).

## Notifications

The app sends monday in-system notifications (Bell icon in left sidebar) to notify in case of issues or warnings. The list below explains the most common notifications.

<b>Define subitem triggers</b>	<p>The feature Rollup Subitems to define the subitem triggers can only exists once in this board.</p> <p>If you want to change which triggers to use for the subitems you can edit the existing integration. You can't have multiple of these integrations on the same board.</p>
<b>Define subitem triggers</b>	<p>You need to have at least one subitem on your board before you can use the Rollup Subitems app.</p> <p>You can only add the integration to define the subitem triggers when there is at least one subitem present on your board.</p>
<b>License management</b>	<p>Rollup Subitems is disabled because your trial period is over. Please visit <a href="https://excellent-team.nl/solutions">excellent-team.nl/solutions</a> if you want to purchase this feature.</p> <p>The 10-day trial period has passed. You can unlock the app by purchasing it at <a href="https://excellent-team.nl/solutions/rollup-sub-items/">https://excellent-team.nl/solutions/rollup-sub-items/</a>. Your existing integrations and configuration will be still available after you unlock the app, there is no need to re-install the app.</p>
<b>License management</b>	<p>You need to purchase the feature Rollup Subitems for each board. You currently used all (nr_of_boards) available boards in your account.</p> <p>The app is licenses per Monday board. For each board in your account you want to use the Rollup Subitems app you need to purchase a license.</p>
<b>Add "Watch" integration</b>	<p>ERROR: The output column (name_of_the_column) is already in use by another recipe.</p> <p>The column in the parent item used for the output of a "Watch" integration can only be used once. Please select a different column for each "Watch" integration.</p>
<b>Filter creation</b>	<p>The filter with name "name_of_the_filter" already exists for this board.</p> <p>The filter names for the named filters need to be unique. Please use a different name for the filter.</p>