

Status Controlled Groups

Introduction

Status Controlled Groups moves an item from a given group to another group on status change. The move will only take place if the item lives within the group specified. With this you can easily transform your groups to process or project stages. Every time the user changes the status to e.g. Done the item is advanced to the next group (stage) and the status is reset to e.g. Assigned. With an advanced recipe you can even specify that the owner should be changed when advancing through your groups.

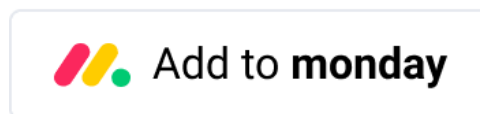
The Status Controlled Groups app is developed by monday.com power users and is available on the monday.com marketplace. When downloaded from the marketplace the app is installed in trial mode (10 days) and can be unlocked through the [Excellent Team](#) shop at any time.

You can skip to:

- [Installation](#)
- [Authorize the app](#)
- [Configuration](#)
- [Usage](#)

Installation

When you have already installed this app (e.g. in trial mode) you can skip to the [Configuration](#) section. There is no difference between the trial version or the paid version.



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 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:

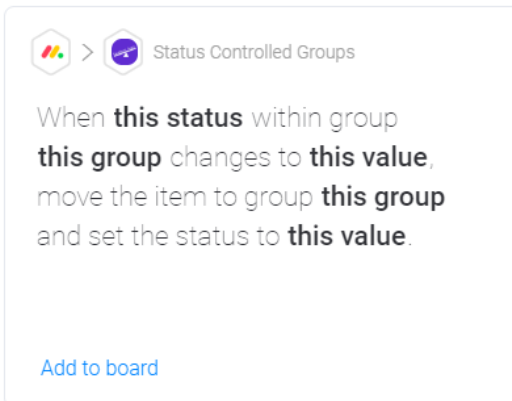
Read all of your boards data	The requested permissions (scope) may differ for different apps
Modify any of your boards' data	
Send notifications on your behalf	
Create and modify webhooks	

Cancel

Install

Configuration

There are two recipes available that can be mixed within the same board.

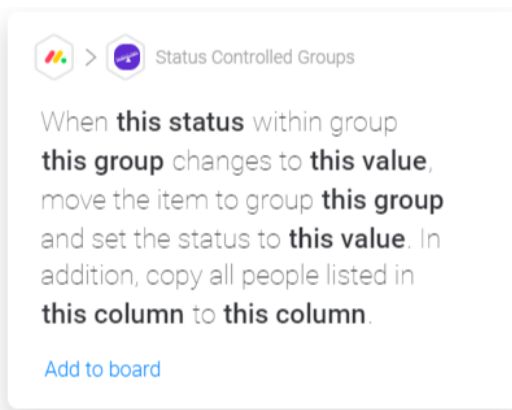


The screenshot shows a configuration card with a header 'Status Controlled Groups' and a description: 'When **this status** within group **this group** changes to **this value**, move the item to group **this group** and set the status to **this value**.' Below the text is a blue 'Add to board' button.

The simple recipe is configured with:

- this status; the status column to watch
- this group; the group to watch
- this value; the status value to act on
- this group; the group to move the item to when triggered by the status
- this value; the value to set the status to after it has been moved to the target group

Caution: it is possible to build an endless loop when the target group has another recipe that move the item back to the source group and set the status to the value used in the source group to trigger the item move.



The screenshot shows a configuration card with a header 'Status Controlled Groups' and a description: 'When **this status** within group **this group** changes to **this value**, move the item to group **this group** and set the status to **this value**. In addition, copy all people listed in **this column** to **this column**.' Below the text is a blue 'Add to board' button.

The other recipe is an extension to the first one. If you configure your board with an Authors and a Reviewers (person) column in addition to an Owners column, you can copy people from one column to the other on item move.

When combine with board permission so that only people in Owners can edit the item, you can transfer ownership when an item is moved. See also the usage section.

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).

Example usage:

An item containing a document starts in the group Bronze, which is used for documents just started. When the author (=owner) set the status to Finalized the item is moved to group "Review 1", the status is reset to Assigned and the people listed as Reviewers are now becoming the owners of the item. The board permissions are set so that only Owners can make changes to the item.

When the reviewers set the status to Finalized the item advances to the group "Silver" and the ownership is transferred back to the Author(s). In this Silver group the author can change the document according to the comments from the reviewer and submit it for a second review by setting the status to Finalize. The item will move to a group called "Review 2" and ownership is transferred to the reviewers. When the reviewers are happy they can set the status to Finalize and the item will move to the Finalized group.

You can even configure a second recipe in the "Review 2" group that triggers on a Status like "Please Redo" which moves the item back to Silver and make the author the owner again.