Round Robin Assignments

Introduction

Round Robin Assignments let you select a team that holds all possible people that can be assigned to new items. When a new item is created the person is picked from this team. The app supports two methods of picking a person from the team: Round Robin and Random.
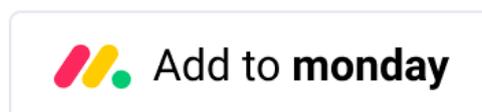
As an alternative the team can also be defined in a cell, defined by an item and a column. The Round Robin Assignments Column app is developed by monday.com power users and is available on the monday.com marketplace. When downloaded from the marketplace the app is installed in trial mode (10 days) and 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

Modify any of your boards' data

Send notifications on your behalf

Create and modify webhooks

The requested permissions (scope) may differ for different apps

Cancel   Install

Configuration

You can configure the feature as any other monday.com automation. Just click the highlighted words to configure the feature for your board. The app supports three different trigger types and two methods to define the team. The available trigger types are:
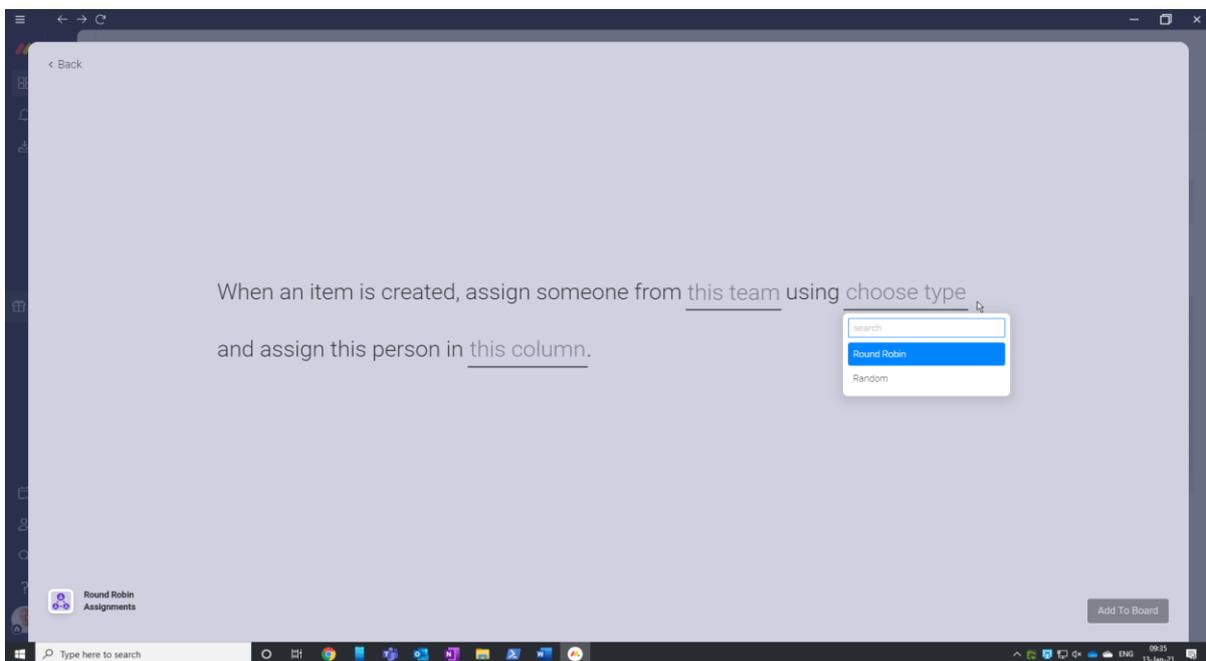
- When item is created; this recipe can only exists one time in a board.
- When checkbox is ticked (multiple checkboxes are supported); when the checkbox is unticked the assignment for that item will be cleared.
- When status change; you can add multiple of these recipes as long as the status value is unique. This enables you to:
    - Define a team to pick from for reviewing the item
    - Define another team to pick from for pricing the item
    - Etc.

The team can be define by:

- An existing monday.com team
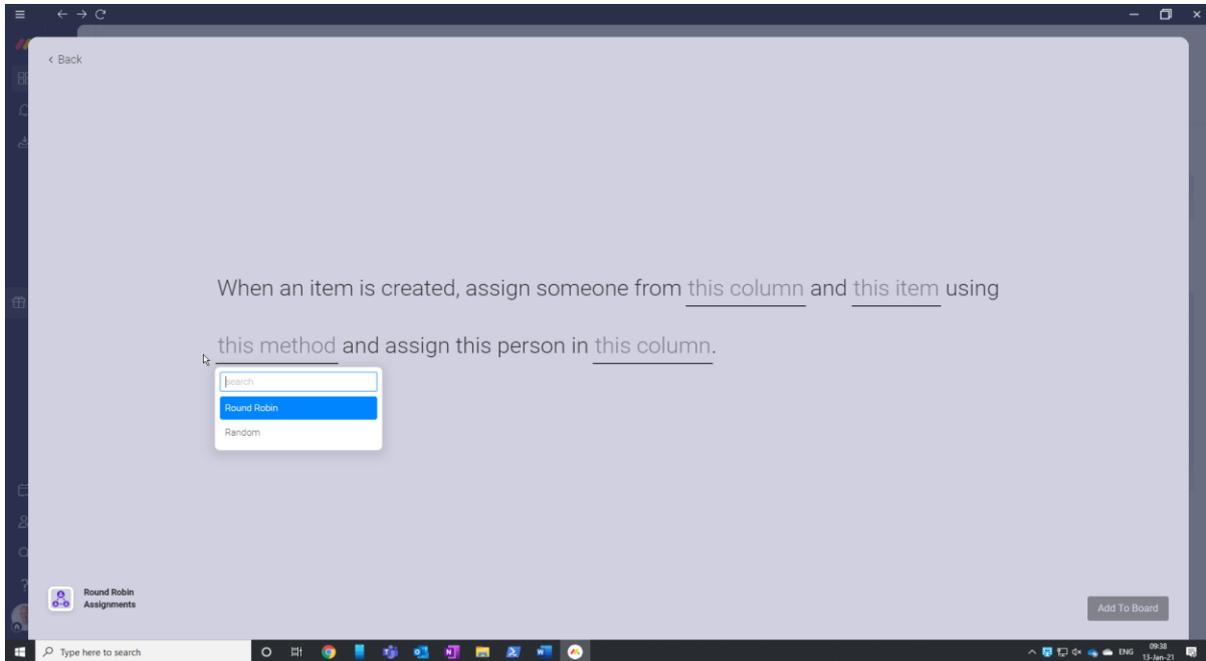- By selecting an item and column on the board where all individual members are defined

Below is are two example recipes, in this case for the create item trigger:

- this team: a (predefined) monday.com team
- choose type: a dropdown box to select either Round Robin or Random
- this column: the column used to store the assigned person

The alternative recipe for the same create item trigger and where you can define a team in a given cell uses:

- this column: the column that specifies the team
- this item: the item that specifies the team

When ready you can add the feature to your board by clicking "Add To Board" in the lower right corner.

Caution: when using an existing cell (column + item) that holds persons in a people column to define the "team" you should check if the persons listed in that cell are subscribed to the board. In normal situations this should be the case but in case you are using a duplicated board and did not specify to include subscribers in the duplication process this will lead to an issue. In that scenario the app tries to assign somebody from the team to an item and that person might not be subscribed to the board.

Checkbox column

The above recipes are triggered on item creation. Likewise there are two recipes that are triggered on ticking a checkbox in a checkbox column. When using the recipes trigged by the checkbox column the person in the selected people column will be unassigned when the checkbox is unticked. You can use multiple checkbox columns on your board.

Status column

Beside the create item and the checkbox trigger you can define a status column and status value to trigger the action. You can configure a different team for each different status value. The status column / status value need to be unique as the app needs to know which team to pick the next assigned person from.

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).

After configuring the app each new item, checked item or status change will get a team member assigned to it. In case you use the alternative recipe – defining the team in a given cell – the cell can contains members, guests and team. In this scenario the team specified in the cell will be assigned and not the individual members within the team.