CONTENT STRATEGY & INTEGRATION

Monday.com Job Aid

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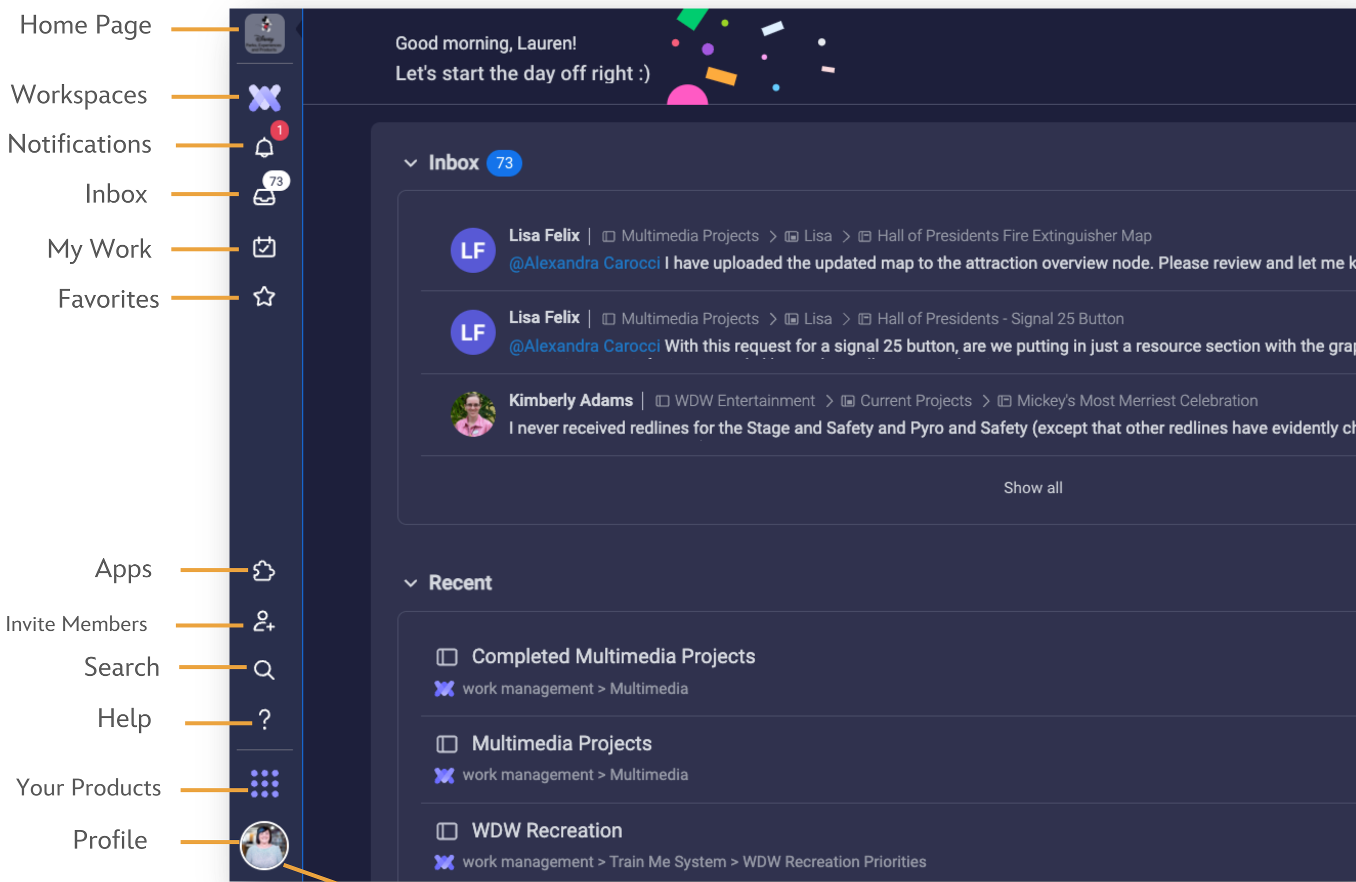
Monday Home Page

The home page is what you will see when you log in to Monday.com. You can always access this page by clicking the Home Page button in the top left corner of the screen.

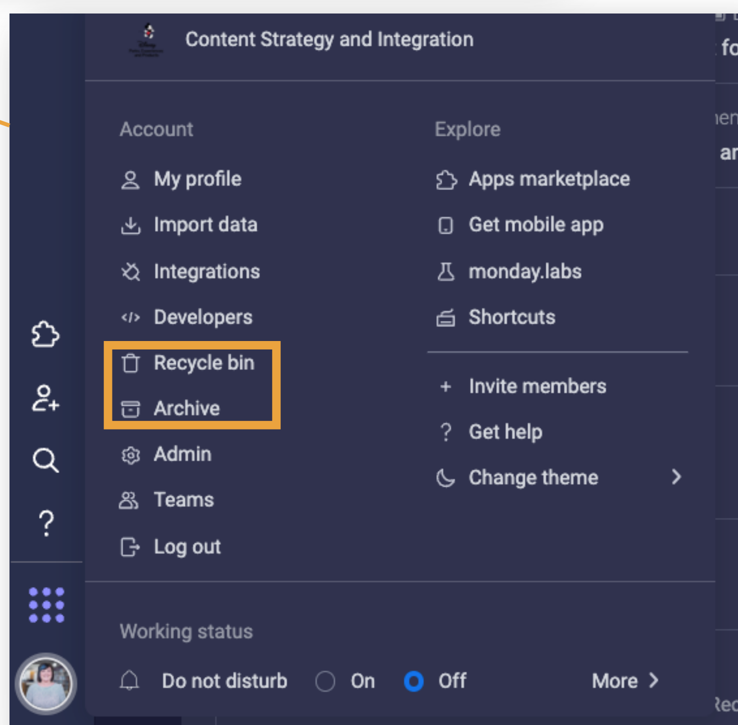


These items are accessible by clicking on your profile. The most important items are the Archive and Recycle bin options.

To temporarily delete a board, item, workdoc, etc. you can archive the content. You can always view and restore if needed.

If you delete something it will be added to the recycle bin.

Note: Items only stay in the recycle bin for 30 days. Remaining time is noted under each item.



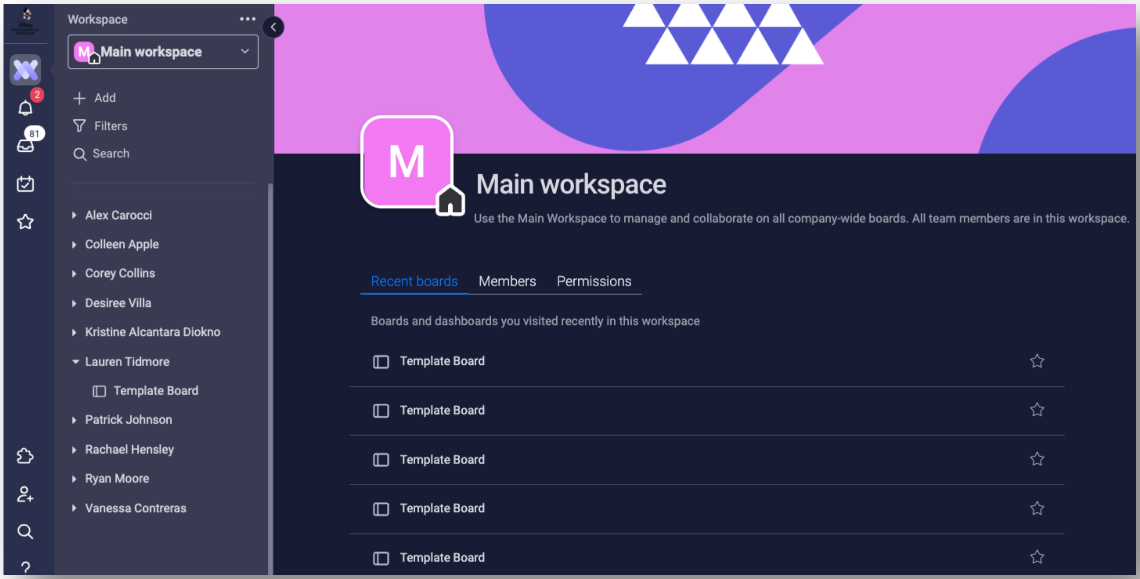
Workspaces

Main Workspace

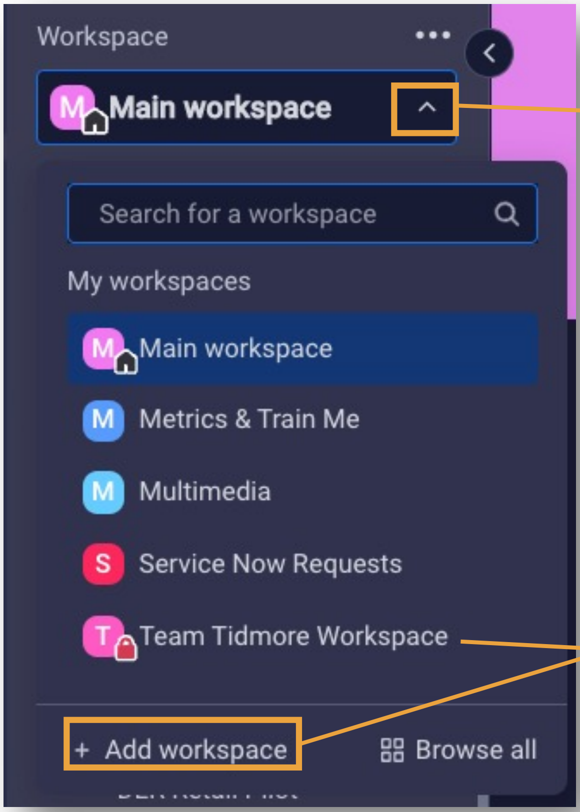
This is the main CS&I workspace.

Everyone has access to this; each person has a folder which contains a template board.

You can add boards, delete the template, etc.—whatever works for you!



Additional Workspaces



You have access to additional workspaces listed here. To access this list, press the arrow next to Main Workspace.

You can also create your own personal workspace that only you/who you designate can access.

SUPPORT

[Learn more about workspaces.]

Metrics & Train Me Workspace

Overview

This workspace is where you will find the following items:

Train Me: New Item Request Form
**used for all LOB*

Your LOB Folder

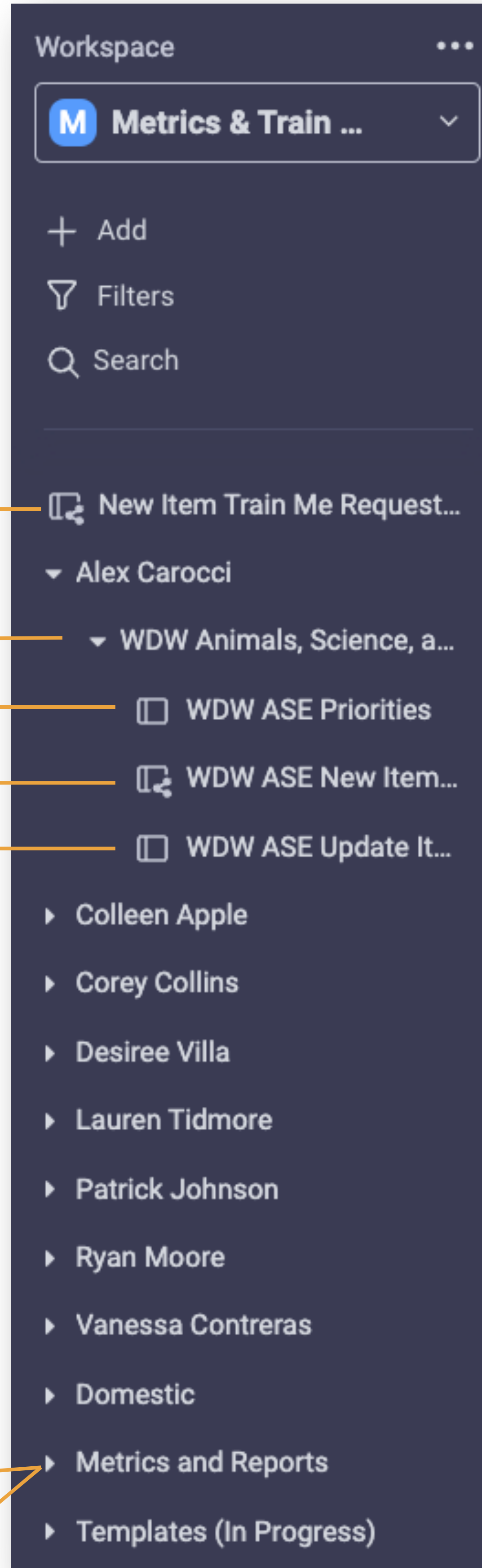
LOB Priorities Sheet

Train Me: LOB New Item Request
**automatically filled in from the request form above*

Train Me: LOB Update Item Request Form
**specialized for each LOB*

Total Documents Inventory

CS&I Metrics



Boards

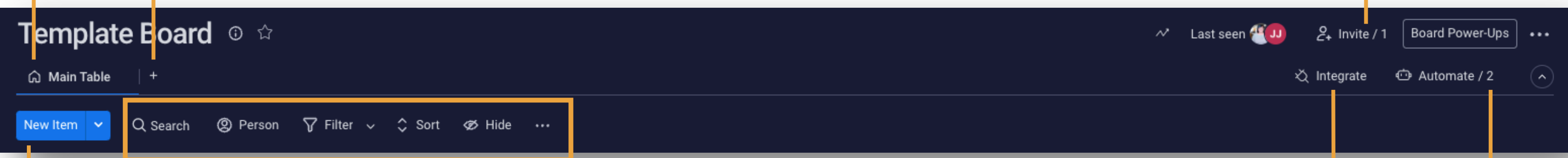
Board Functions

There are many different functions you can incorporate into your boards.

This is one available view for your board. This view mimics excel in that everything is shown in a grid view.

Invite other members of CS&I to access your board. They can be members or viewers.

Use this + button to add additional board views.



Use these filters to find/sort information in your board.

Integration allows you to link the board to Teams (and other apps) for notifications.

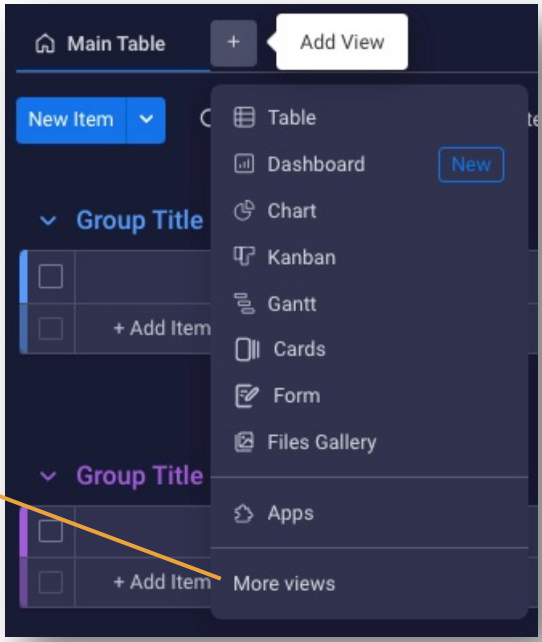
Add a new item to your board or import existing items.

Automations allow you to build functions that your board will do automatically.

Board Views

Boards have different views depending on what you want to focus on.

Click More Views to explore all the types of boards Monday.com offers!



SUPPORT

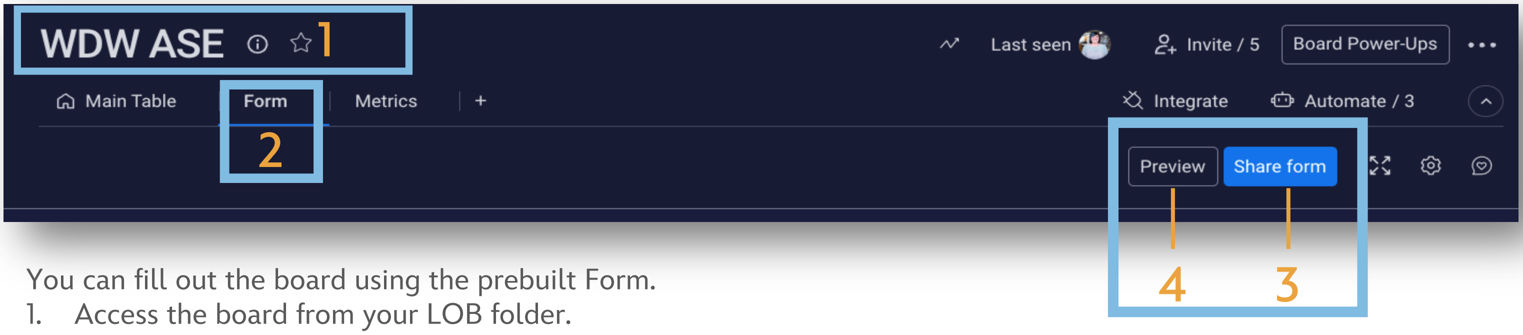
[Learn more about boards.]

[Learn more about board views.]

Priorities Sheet

- Task/Item Name
- *Content Specialist (main table only)*
- *Status (main table only)*
- Location
- Documents Publishing
  - Number of documents (automatic drop down depending on which documents selected)
- eChecklist redlines?
  - Number of eChecklists published
- Define specific work/version notes
- Delivery Date
- Publish Date
- Project vs. Sustainment
- Additional notes
- Next Action: Who
- Next Action: When
- *Total Number of Documents Publishing (preset formula to total all documents for one item; main table only)*

Form

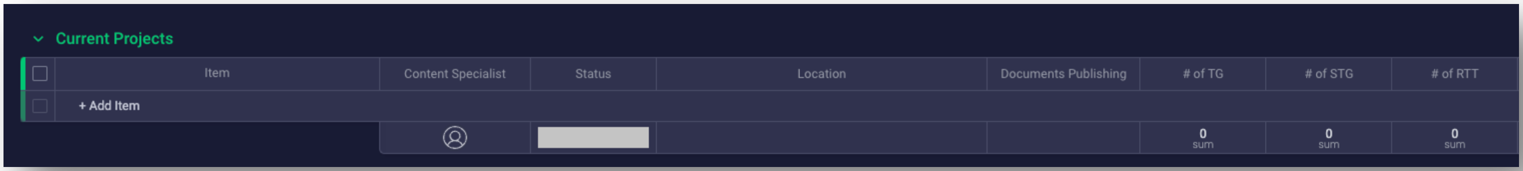


You can fill out the board using the prebuilt Form.

1. Access the board from your LOB folder.
2. Click on the Form view.
3. Click Preview.
4. Complete and submit the form.

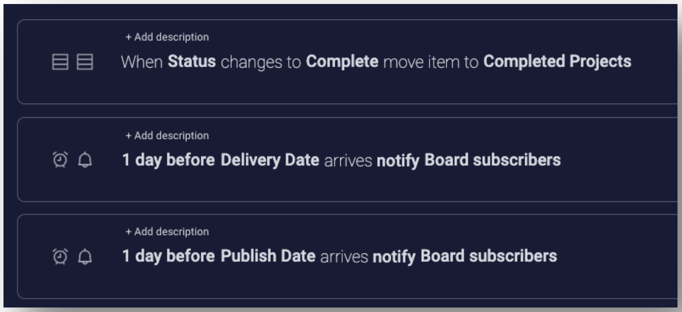
Main Table

You can also fill out the board via the Main Table. This works like a typical Excel sheet.



Form Automations

The Update Item Request Form is set up to automatically move to projects marked as Done (in the status column) to completed projects. Additionally, it will send reminders when you are close to your delivery and publish dates.



The automations read:

- When Status changes to Done move item to Completed Projects.
- 1 day before Delivery Date arrives notify Board subscribers.
- 1 day before Publish Date arrives notify Board subscribers.

New Item Request Form

Sending/Completing the Form

The New Item Request Form is the same form from Teams; therefore, your LOB should be familiar with completing it. The only difference is that we have split this from the update form, hopefully making it easier to complete.

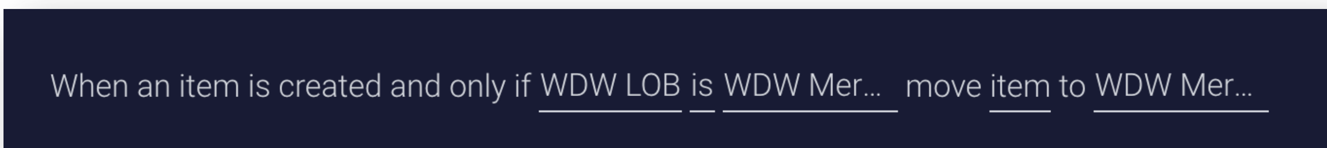
All LOB will use this form. Please ensure your partners have the link to complete the form.

Form Automations

The New Item Request Form is set up to automatically move to your LOB New Item Form (in your LOB priorities folder).

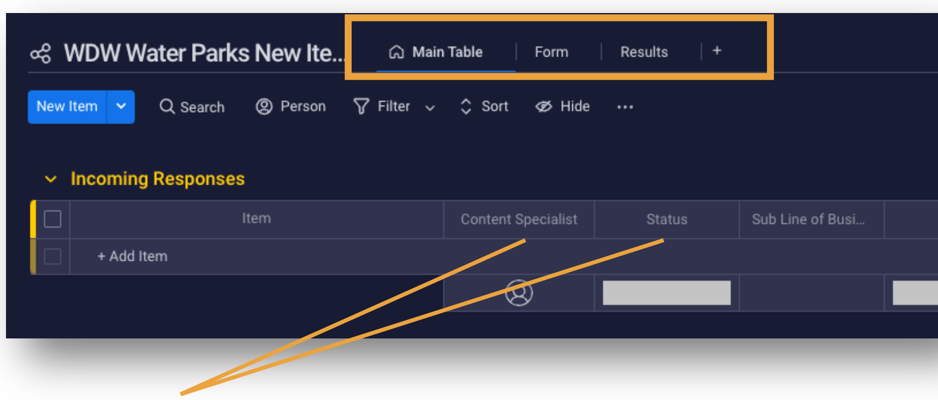
The automation reads:

- When an item (in the New Item Request Form) is created, and only if the LOB is [specific LOB] then move the item to [specific LOB form in the priorities folder].



Viewing Form Results

Access your LOB New Item Request board to see incoming responses. You can view these as a table or completed form.



There is also a space for you to assign a content specialist to and update the status of each item. Even if your specialist only has viewer access (due to license number restrictions) they can still be assigned work [they just can't edit].

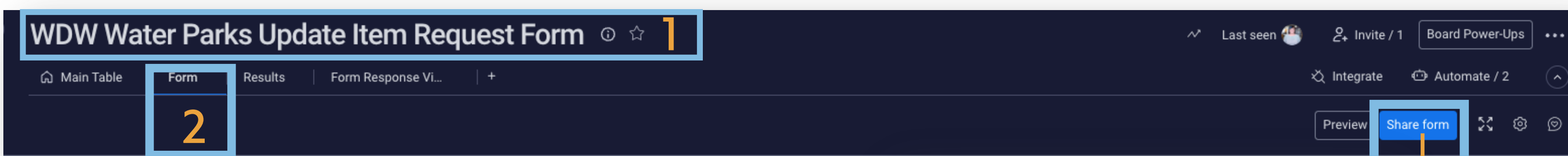
Update Item Request Form

Sending/Completing the Form

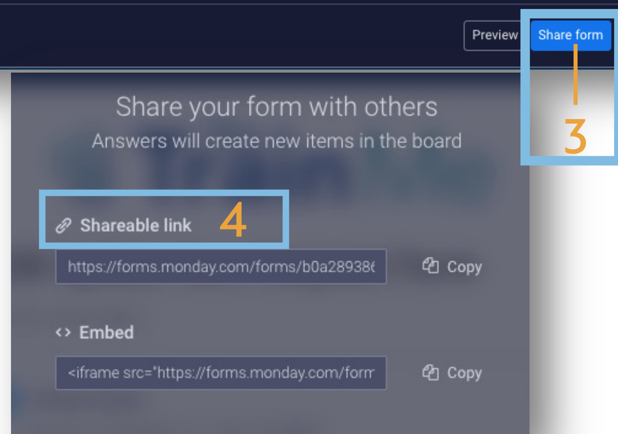
The Update Item Request Form is the same form from Teams; therefore, your LOB should be familiar with completing it. The only difference is that we have split this from the new item request form, hopefully making it easier to complete.

Each LOB will have an update form tailored to their specific placeholder products in Train Me; however, these products have not been added (as of 10/6/22). Once all naming conventions are as accurate as possible, they will be added into the form.

Please note: The update form can still be used at this time! Adding placeholder products will make it easier for your LOB to complete the form, but it is not necessary.

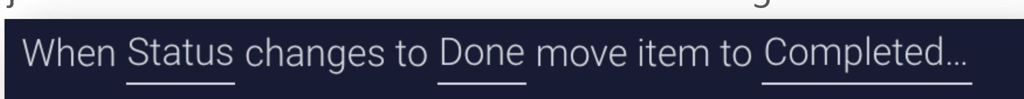


To send the form to your LOB:
1. Access the board from your LOB folder.
2. Click on the Form view.
3. Click Share Form.
4. Copy the link and send that to your LOB.



Form Automations

The Update Item Request Form is set up to automatically move to projects marked as Done (in the status column) to completed projects. The automation reads: When Status changes to Done move item to Completed Projects.



SUPPORT

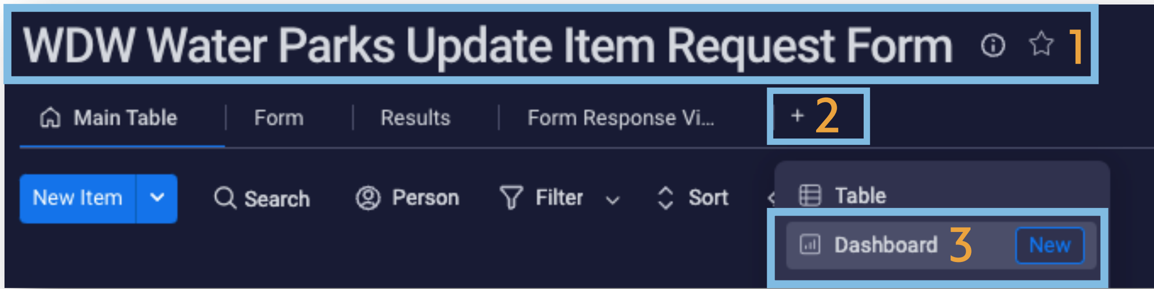
[Learn more about automations.]

Dashboards

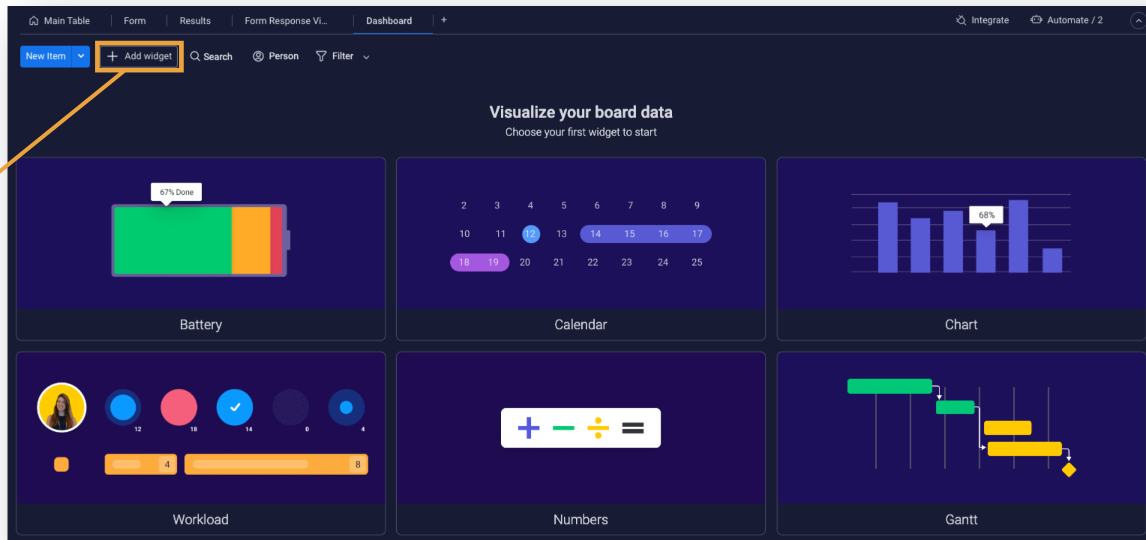
Create a Dashboard

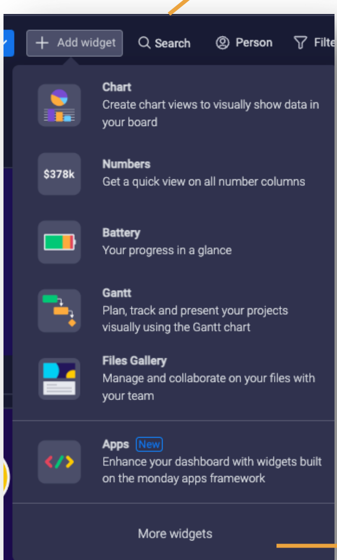
To create a new dashboard:

1. Access the board.
2. Click on the + button.
3. Click Dashboard.



Once you've created a dashboard, you can choose which widgets you would like to see. Select one of the commonly used widgets (automatically appear with new dashboards) or select the +Add widget button to further customize your dashboard.





Click More widgets to explore all the types of widgets Monday.com offers!

SUPPORT

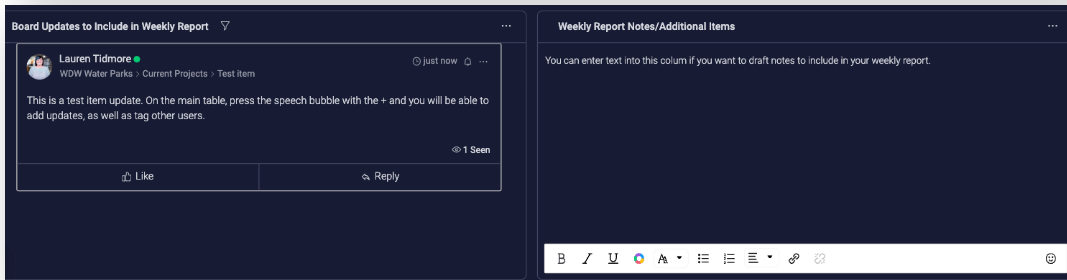
[Learn more about dashboards and widgets.]

Metrics (Dashboard)

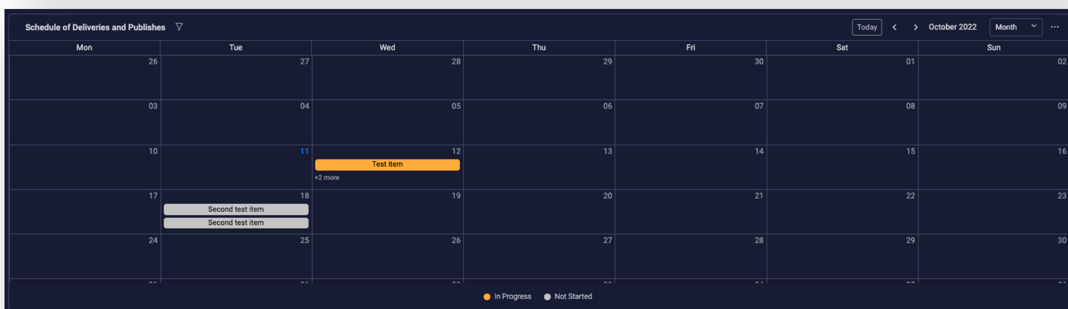
The priorities sheets have pre-built metrics. These metrics include:

- Total # of publishes by week
- Total # of publishes by location

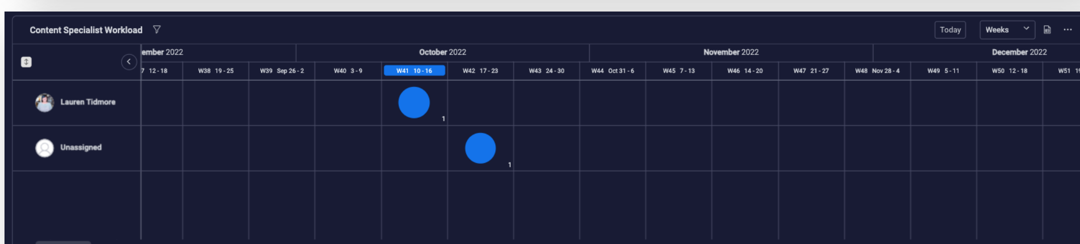
- Board updates to include in weekly report
- Weekly Report notes/additional information



- Schedule of deliveries and publishes



- Content specialist workload



- Total # of publishes by month
- Total # of publishes by year
- Total # of publishes by quarter

Metrics Settings

These metrics should automatically upload based on your priorities sheet. Below are the settings should anything not work. If you need any help, please let me know!

of Publishes by Week

X Axis	Group By > Week LOB Board Name > Publish Date
Y Axis	Select all # of [document name] Select Formula (if you want the total number of documents to show) Calculation Function > Sum
Choose Groups	All groups

of Publishes by Location

X Axis	Group By > Week LOB Board Name > Location
Y Axis	Select all # of [document name] Select Formula (if you want the total number of documents to show) Calculation Function > Sum
Choose Groups	All groups

Schedule of Deliveries and Publishes

Column Data	Select Delivery Date, Publish Date, Next Action: When Select Subitem columns as needed.
Color by	You can select your own setting here; however, coloring by status allows you to see things in progress, not started, on hold, and completed.
Choose Groups	All groups

Content Specialist Workload

Time Columns	Workload > Items or Subitems (cannot select both) Time columns > Publish Date (can change to whatever date column you want to track)
Resource type	Content Specialist
Measure effort by	Count Items
Choose Groups	All groups

Metrics Settings contd.

These metrics should automatically upload based on your priorities sheet. Below are the settings should anything not work. If you need any help, please let me know!

of Publishes by Month

X Axis	Group By > Month LOB Board Name > Publish Date
Y Axis	Select all # of [document name] Select Formula (if you want the total number of documents to show) Calculation Function > Sum
Choose Groups	All groups

of Publishes by Year

X Axis	Group By > Year LOB Board Name > Publish Date
Y Axis	Select all # of [document name] Select Formula (if you want the total number of documents to show) Calculation Function > Sum
Choose Groups	All groups

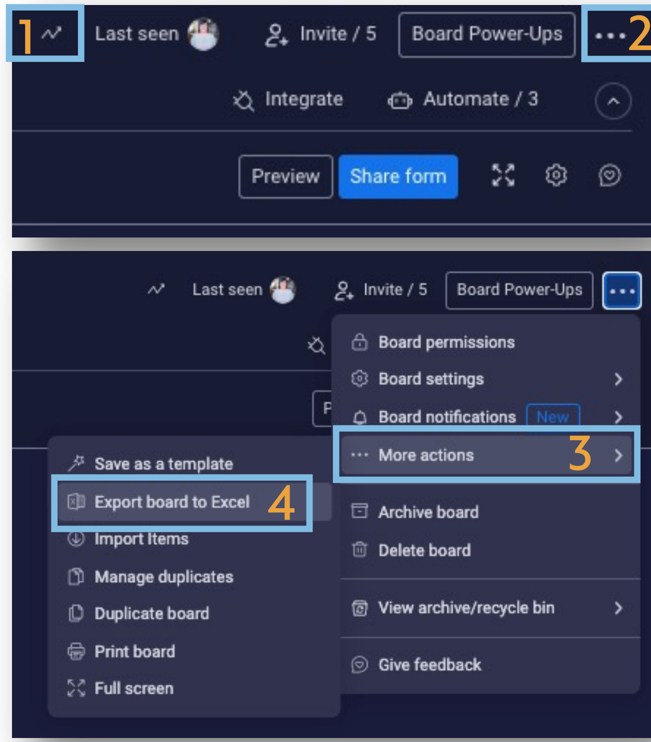
of Publishes by Quarter

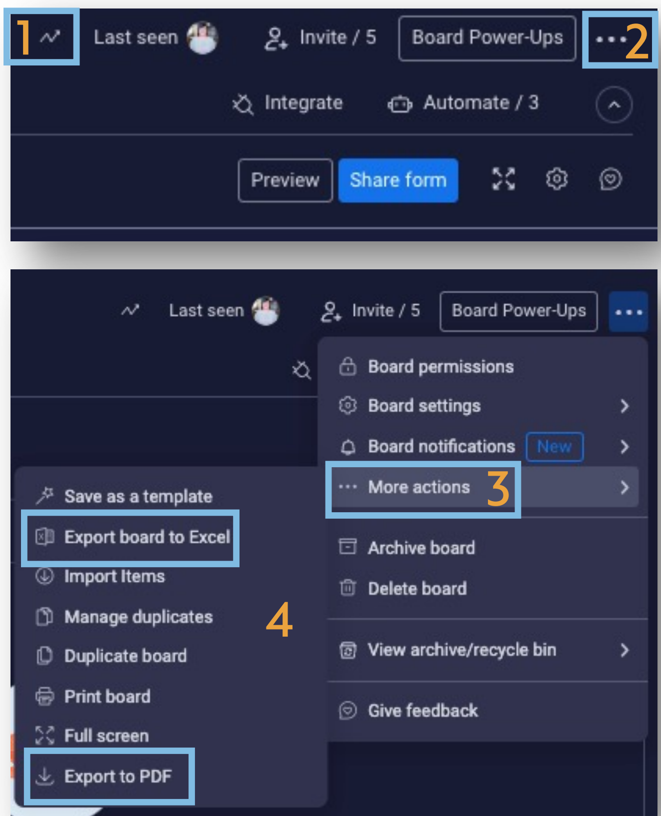
X Axis	Group By > Quarter LOB Board Name > Publish Date
Y Axis	Select all # of [document name] Select Formula (if you want the total number of documents to show) Calculation Function > Sum
Choose Groups	All groups

Export Boards and Dashboards

Export Board

1. Go to your board.
2. Click on the three dots (upper right corner).
3. Go to More actions.
4. Click Export board to Excel.





Export Dashboard

1. Go to your board.
2. Click on the three dots (upper right corner).
3. Go to More actions.
4. Click Export board to Excel or PDF.

SUPPORT

Learn more about importing and exporting.

Support Links

Getting Started

Get started with monday.com
How to get started in an existing account
How do I log into my account?
How to Log in with the Desktop App
How do I invite users to join my account?
Import & export with Excel
How can I import my projects from Asana?
How can I import my boards from Basecamp?
How to import my projects from Google Sheets
How can I import my boards from Trello?
How can I import my tickets from Zendesk?
How can I import from Jira?

Workspace and Organization

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The favorites section
Folders
How to archive and unarchive
The recycle bin
How to keep your account organized

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The difference between board types
Shareable Boards
Private Boards
monday.com board templates
How to duplicate a board
The basics of groups
The basics of items
The subitems
The Activity Log
Can I undo something?
How to custom-design your board
How many items and subitems can I have on a board?
Item default value
Introducing the new board design 🎉

The Basics of Columns

The basics of columns
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How to change a column type
The People Column
The Status Column
The Date Column
The Numbers Column
The Tags Column
The Files Column
Column templates
The Timeline Column
The Button Column
The Connect Boards Column
The Last Updated column
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The Checkbox Column
The Rating column
The Vote column
The Phone Column
The Hour Column
The Item ID Column
The Formula Column
Formula Use Cases
List of all available formulas
The Progress Tracking Column
The Timeline + Numeric Combo Column (Duration Column)
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The Dropdown Column
The Country Column
The Creation Log Column
The World Clock Column
The Link Column
The Mirror Column
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Linkage limitations

Support Links contd.

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What are team members?
What is an admin?
What is a board owner?
What is a board member?
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Workspace permissions
Board Permissions
Column Permissions
Dashboard Permissions
Item Viewing Permissions

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How to communicate with my team
How to assign tasks to your teammates
All about teams
Notifications explained
Bell Notifications
The Inbox
The Updates Section
How to send or receive emails with monday.com
Email to board

Managing Your Time

My Work
Deadline Mode
How to create alert reminders?
Alerts and Reminders with Automations
Calendar sync
Outlook Calendar integration
Sync with Apple Calendar

Developers

Does monday.com have an API?
Board, item, column, and automation or integration ID's
API Quickstart Tutorial - Python
API Quickstart Tutorial - PHP
API Quickstart Tutorial - Javascript
About monday.com's public IP addresses

Manage Your Files

Comments in monday workdocs
monday Docs on file
monday workdocs version history
monday workdocs
How to manage my files in monday.com
File annotations
File versioning

Filters and Navigation

Search Everything
The Board Filters
Hiding columns from your board
The Quick Search
How to sort columns and items
How to move a group, item, or subitem
How to add many items at once
Shortcuts and spreadsheet capabilities
Batch Actions
Conditional Coloring
The IF Function

The Board Views

The board views
How to share a board view publicly
The Timeline View and Widget
The Workload View and Widget
The Gantt Chart View and Widget
The Cards View
The Gantt Baseline
The Chart View and Widget
The Calendar View and Widget
The Files Gallery View
The Map View
The Kanban View
Critical Path for the Gantt Chart
The item pop-up card
The Item Card

Support Links contd.

The Dashboards

[The new and improved Llama Farm Widget]
The Dashboards
The Text Widget
The Bubble Chart
Org Chart widget
The Overview Widget
The Table Widget
The Numbers Widget
Battery Widget
The Bookmarks Widget
The Time Tracking Widget
The Todo List Widget
The "Embed Everything" Widget
Board Updates Widget
The YouTube Widget
The "I Was Mentioned" Widget
The Quote of the Day Widget
The Playlist Widget
The Countdown Widget

Apps

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The Aircall app
How to launch a Google Ads campaign from monday.com
Google Ads app glossary
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The working status
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The Google Ads app
Performance Insights
Pivot Board
Online Docs
Form Response Viewer
Embedded Data Studio
Embedded Airtable View & Widget
Embedded Twitter Feed
Embedded Facebook Feed
Board to Globe
News Updates
Team Updates
Word Cloud
The Goal Widget

Integrations

monday.com Integrations
Gmail Integration
Outlook Integration
HubSpot Integration
The New GitHub Integration
Security & IT: Jira Integration
Adobe Creative Cloud Integration
Security & IT: Outlook Integration
Google Calendar Integration
Jira Projects Progress template guide
Zapier JSON Formatting Examples
Microsoft Teams App
Pipedrive Integration
Facebook Ads Integration
Copper Integration
Stripe Integration
LinkedIn Integration
Gitlab Integration
SurveyMonkey Integration
Jira Server & Data Center Integration
Harvest Integration
Eventbrite Integration
Toggl Integration
Microsoft Teams integration
The JotForm app
Zoom Integration
Salesforce Integration
Basecamp Integration
Typeform integration
Todoist Integration
PagerDuty Integration
Clearbit integration
Trello Integration
Jira Cloud Integration
Twilio Integration
Zendesk Integration
Webhook integration
Asana Integration
Mailchimp Integration
Slack integration
GitHub Integration
How to create an integration using Zapier

Working with External Users

How to share projects with guests?
How to get started as a guest