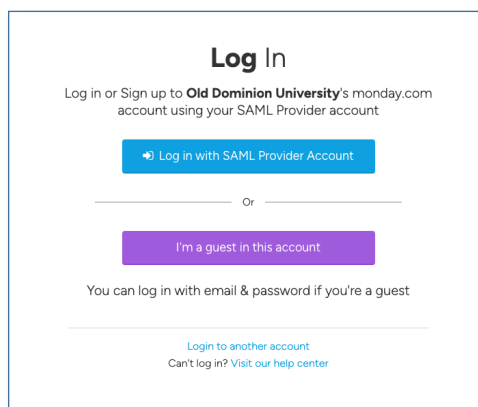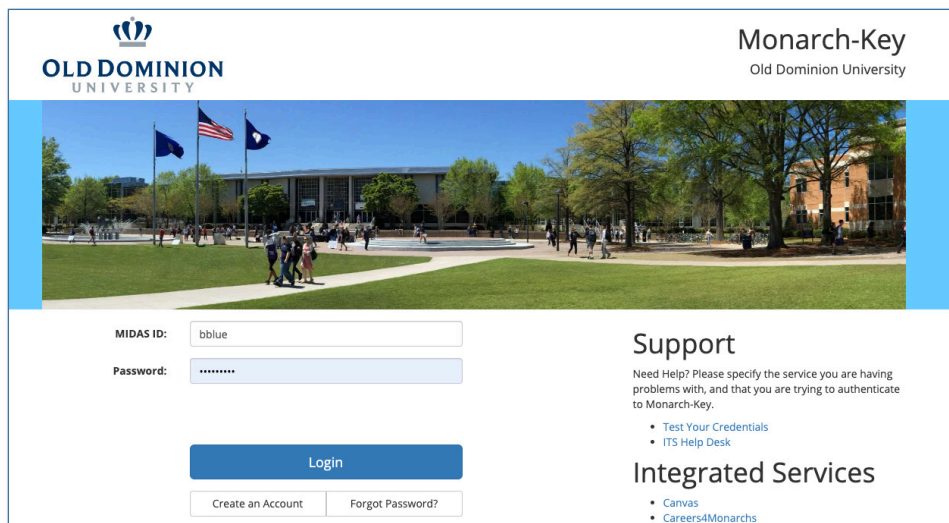# OLD DOMINION UNIVERSITY

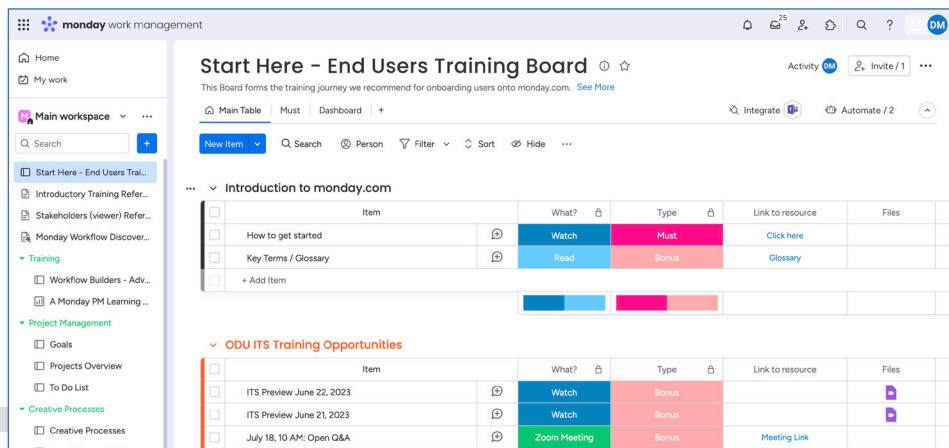# Using monday.com as a viewer

Log in to monday.com

1. Go to odu.monday.com and click **Log in with SAML Provider Account**.

2. Log in with your MIDAS ID and password.

3. You'll start in the **Main workspace**.

Information Technology Services

www.odu.edu/its

(757) 683-3192

itshelp@odu.edu
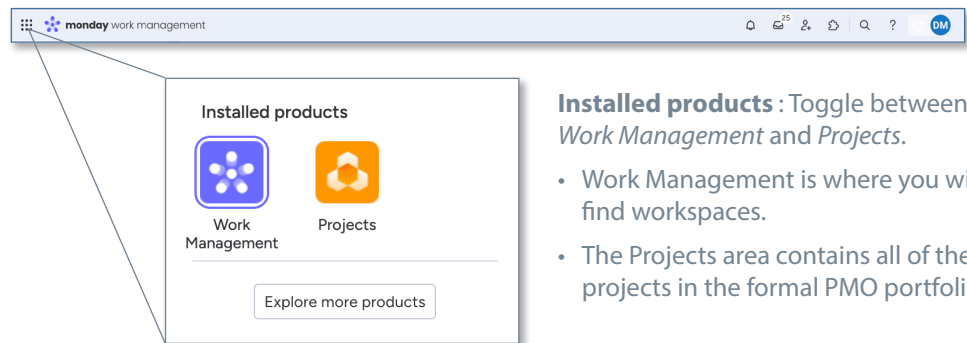
1100 Monarch Hall

oduits   odu_its

Basic navigation

As a viewer, you can navigate through much of monday.com and access a variety of open workspaces and boards. Most of the time, you'll land on your home page or you'll have a direct link to a board of interest.

The **Home** page will display the boards you've most recently visited. Click on an icon to open that board.
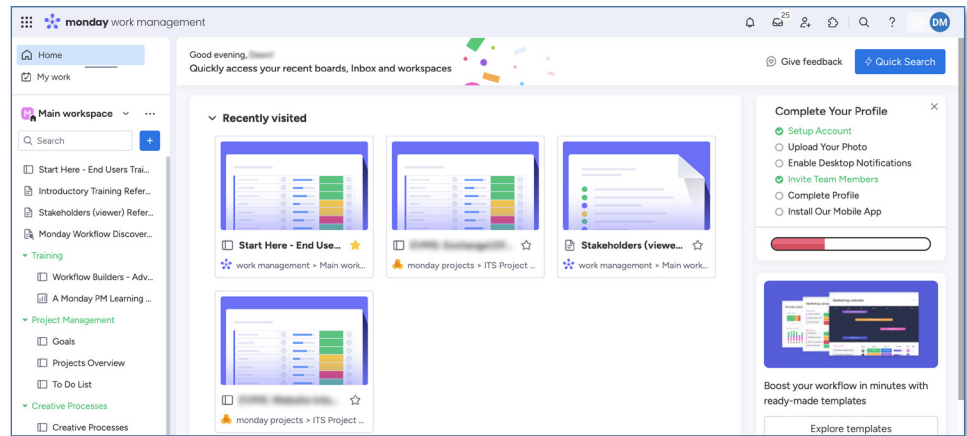

monday.com has two main areas: **Work Management** and **Projects**. Work management is available for teams to track and organize a wide variety of work items. The Projects area is specifically used for the ITS project portfolio.

Installed products : Toggle between *Work Management* and *Projects*.

- Work Management is where you will find workspaces.

- The Projects area contains all of the projects in the formal PMO portfolio.

To see the formal project portfolio select **Projects** then select the **ITS Project Portfolio Workspace**. This is where you'll find the boards where your project requests and active projects are tracked.
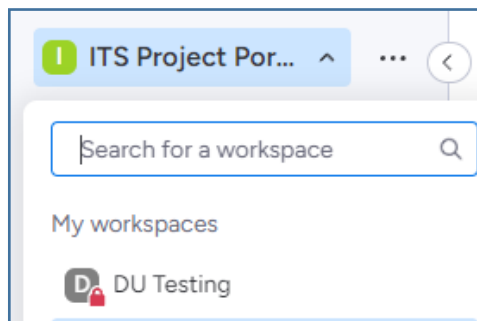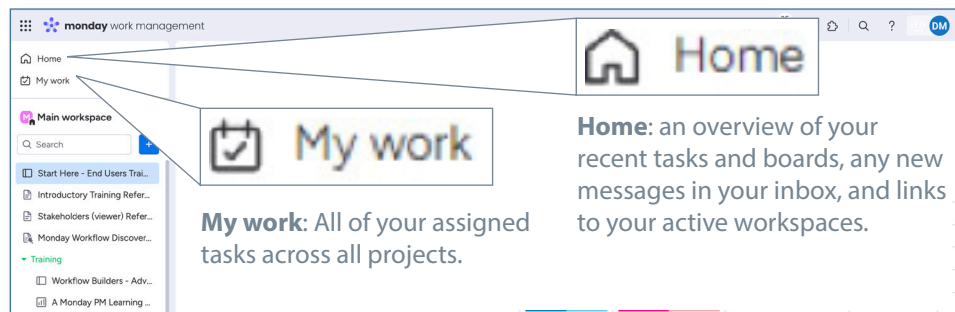
You can select other open workspaces or workspaces you've been invited (sub-scribed) to by clicking the arrow next to the current workspaces name.
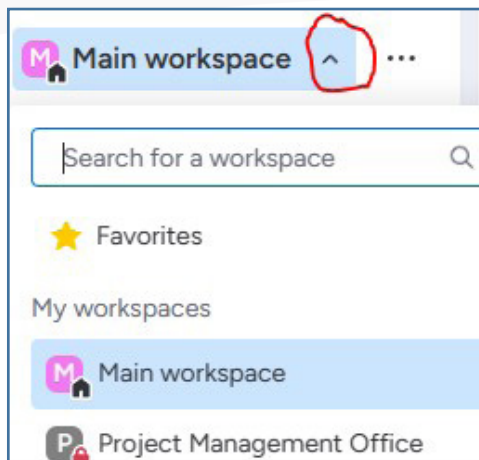
* Project requesters are subscribed to project boards during the initiation phase by the Project Management Office. As planning proceeds, additional stakeholders may be subscribed to the project on an as-needed basis.
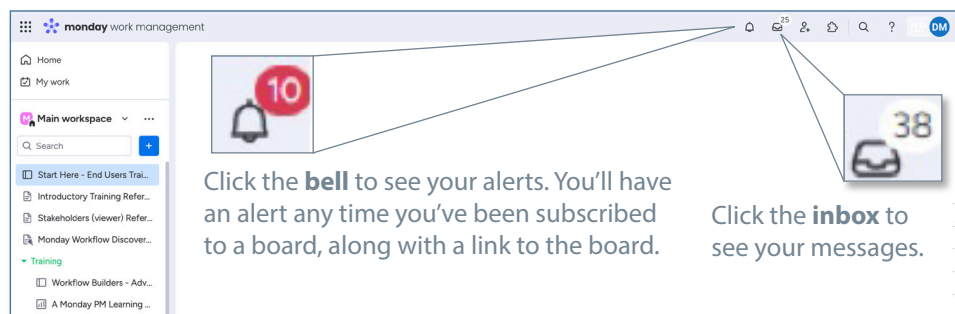
Navigation

Home takes you to what should become your standard landing page, display-ing your most recent boards in the main panel. You can click on the board your seeking from the list of boards you've recently viewed to navigate quickly.


My work: All of your assigned tasks across all projects.

Home: an overview of your recent tasks and boards, any new messages in your inbox, and links to your active workspaces.

My Work displays a list of all your assigned items. As a viewer you can not inter-act on the board, however, you can still be assigned to items by an ITS project manager as a way of drawing your attention to specific needs. If you have been then these items will display in My work and you can view them in this view without navigating to boards.

You can also navigate using the icons to the right of your top bar.

Click the **bell** to see your alerts. You'll have an alert any time you've been subscribed to a board, along with a link to the board.

Click the **inbox** to see your messages.

Finally, use **favorites**, available from the workspace pull down menu in both the Work Management and Projects products. Create favorites by clicking the star at the top of your favorite boards, and they'll show up in this list.
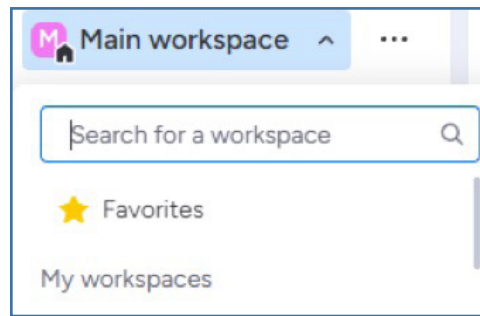

Boards

The basic unit in monday.com representing a project is the **project board**. Boards are task-oriented tables of items focused on planning and task completion rather than a narrative description of project progress. Find your boards in the sidebar (1).
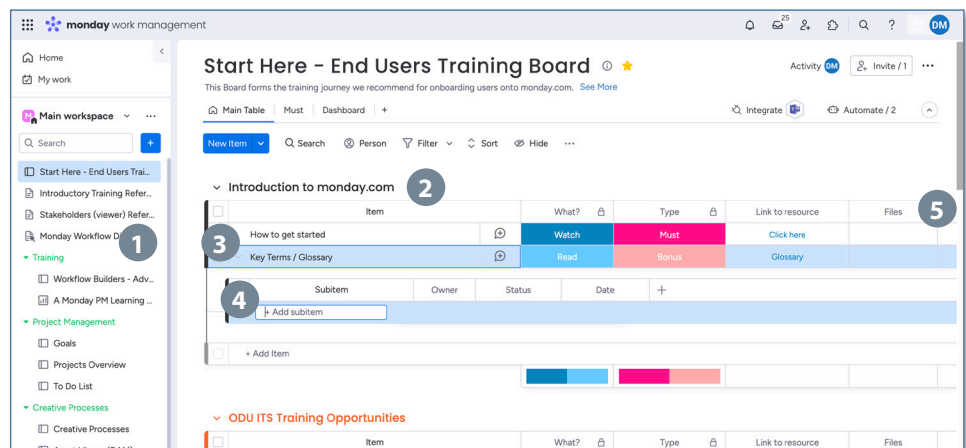
Each board contains:

- **Groups** (2) are sortable sections of items. As a viewer, you have some options for working with groups that you can see by clicking the ellipsis that appears when you move your pointer over the group name. (One option that may be useful is the ability to export to Excel.)
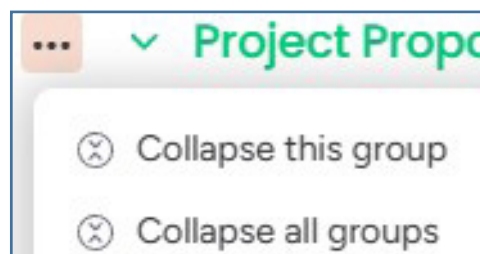
- **Items** (3) are single lines representing tasks (think of rows in Excel). Each item has its own **conversation icon** where you can start or view individual task updates.

- **Subitems** (4) are item subtasks (only available one level deep). See sub-items by moving your mouse just to the the right of the item checkbox and clicking the down arrow.

- **Columns** (5) work kind of like colums in Excel. We use a few key column types in our project environment:

  People (Person) - the assigned resource(s) responsible for the task. We also use a second People column to assign a Team. As a viewer, you can hover over the icon in the people column to get full contact information, but you cannot trigger an update or change a resource.

  Status - reports on the progress of the task. Our default values for this column are blank gray for not started, Work in Progress, Stuck and Done.

Timeline - displays the time period during which a given task will be worked on. In the monday.com timeline, Milestones are denoted by a specific, single day and marked with a diamond symbol. You can expect major deadlines to be shown on boards with a milestone.
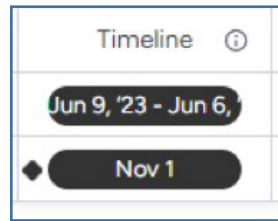
Numbers - a column for tracking numeric values. As a stakeholder, talk with your Project Manager about any values you'd like to track over time.

monday Docs - a column for creating an in-system document associated with the task. In our default project board, we have some monday Docs templates. The first line item of every project contains a Doc with the basic information that came in with the request. To view a monday Doc, click on the Doc icon in the column.
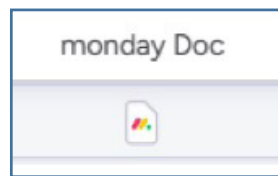
*If your PM is keeping notes in a monday Doc, this is a great place to find information and updates. You can click the ellipsis at the top right of a monday Doc to print or export a copy.

Board Views

Board views represent the different ways a PM may wish to display and run the project. As a viewer you have access to these views. The PM will determine which view of the board is the default display. You'll see the views listed at the top of the board, just under the project title.
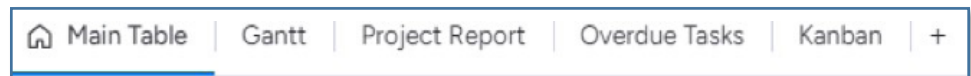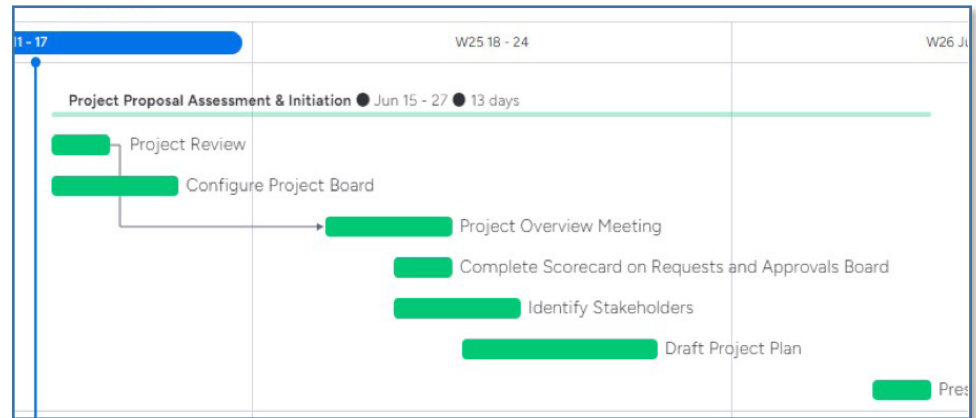

The active view is highlighted with a blue underline. You can use the filters and hide options to limit the view.
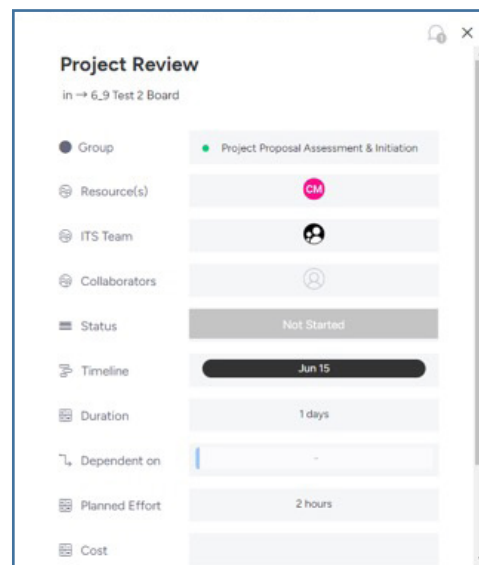
Types of views:

- **Main Table**: This is the default view in monday.com for all boards, and it displays all columns.

- **Gantt**: monday.com offers a useful and intuitive Gantt Chart view.


Each task appears in the Gantt view, corresponding to its timeline schedule. You can click on the bar to see an item's details.

- **Kanban**: This is your basic card wall view and may be the preferred view for many development projects.
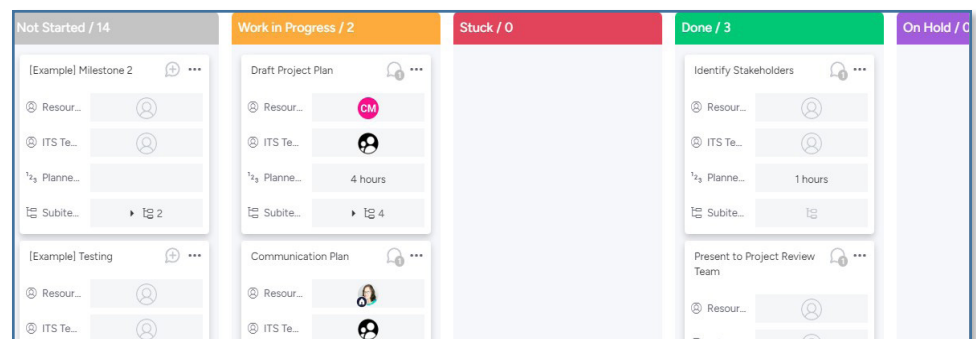
- **Dashboard**: The PMO uses dashboards to report overviews of multiple projects, but each project also has its own dashboard. The label we use for this view is *Project Report*.
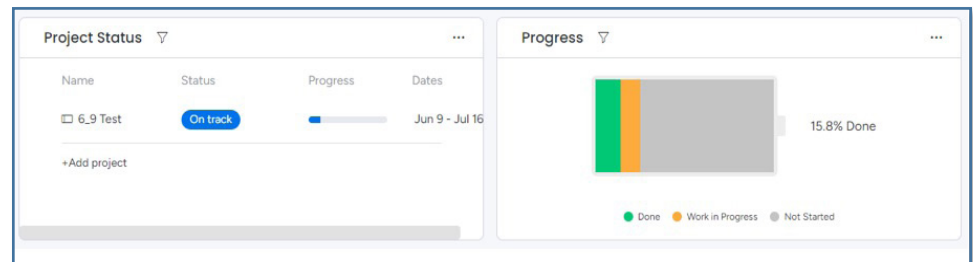
For formal projects, the Overview widget (labeled here as *Project Status*) displays a status based on the percentage of tasks complete vs. the percentage of time elapsed.

The Battery widget (labeled here as *Progress*) displays an overall view of the project based on the status of its items. If you click on each section of the battery, you'll see items listed by status. In the example below, clicking the gray area displays all tasks with a status of 'not started.'
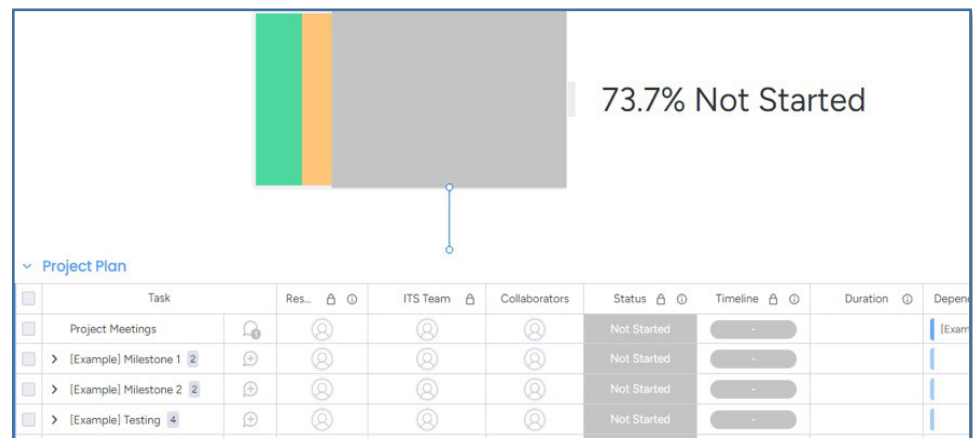
Follow up and next steps

As we transition to this new and very different system, we welcome your feedback and questions. You can fill out this form or email PM_Consultation_Request@odu.us.monday.com to create an item on the PMOs board. We'll reach out to cover any topics or concerns you have as a viewer.