monday.com Official Workbook

This step by step guide will help you get to know monday.com and feel confident as you embark on your monday.com journey. Inside you'll find tips and tricks to help you get the most out of your monday.com account.

Let's get started!

Table of contents

We got you covered

Table of contents

We got you covered

What is monday.com

Getting started......

What is monday.com?

monday.com is a visual collaboration platform that helps transform the way teams work together. It is a simple and intuitive tool that enables people to manage tasks, meet deadlines and build a culture of transparency. It's the next evolution in communicating with your team and managing your projects!

What can I use monday.com for?

The canvas of your business
monday.com can be used to manage any project or process- if you can think it, you can manage it with ease in monday.com.

Manage your projects from strart to finish & boost productivity by creating reports
Divide your projects and processes into phases, milestones, action items and assign ownership to each. Clearly communicate when deliverables are due and create a shared space for everyone to collaborate on the task at hand, giving executives clear insight into your project while simultaneously keeping team members up to date.

See the big picture
Make more informed decisions & boost productivity with custom overviews of your team's key success measures. Visualize project details as Timelines, Gantt charts, Kanban or more. It's all about having digestible data at your fingertips.

Collaborate with ease
Keep all your conversations, files, briefs, checklists and sheets in one place and say goodbye to painfully long meetings and confusing email threads.

Navigation Overview

New design layout

1 **Inbox**
Ongoing feed of updates from boards you are subscribed to or tagged in

2 **My week**
Everything you or your team have due and overdue in one spot

3 **Favorites**
Focusing on Boards and Dashboards that are most relevant to your day to day

4 **Boards**
Manage any work process and organize these by your business folders

5 **Dashboards**
Aggregate info from multiple boards and projects to keep you up-to-date on KPI's and track progress

6 **Notifications**
Recieve updates for any activity related specifically to you on the platform

7 **"Bolt switch"**
Easily search & navigate between boards. Use keyboard shortcuts Cmd+B on Mac or Ctrl+B on PC

8 **Invite team members**
Allow more team members to communicate and collaborate with you

9 **Search everything**
Swiftly comb across your monday.com account for items, updates, files, people, tags & more

monday.com Structure

Boards, groups and items

Boards:

Boards are where your structure your groups, items & workflow. They're virtual whiteboards that represent your work processes or projects and allow you to keep track of all of your tasks and items attricuted to this work process or project.

Main boards

Main boards are visible to anyone who is a team member within your account. A team member can be an admin, a member, or a viewer.

Shareable Boards

Shareable Boards allow you to invite external "guests" to collaborate with you on the board. Guests are people outside of your company such as vendors, clients or consultants. Guests invited to a board do not require a license to your monday.com account.

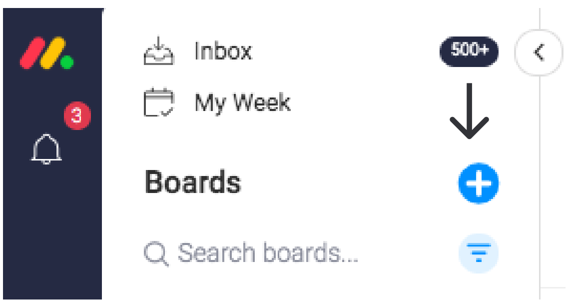
Private Boards

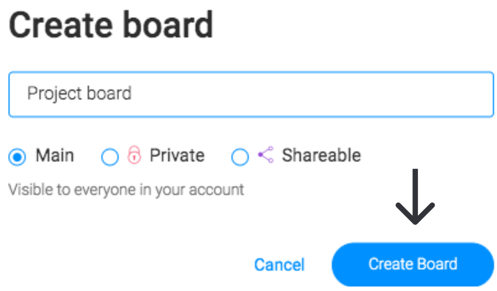
Private Boards are visible only to you and any other license holders that you invite to your board. If you have a board that you want to collaborate on, that has sensitive information, Private boards are the perfect solution.

How to create a new board

To create a new board, click on the plus sign at the top of the left panel.

Then select the type of board that best fits your needs.lgllo





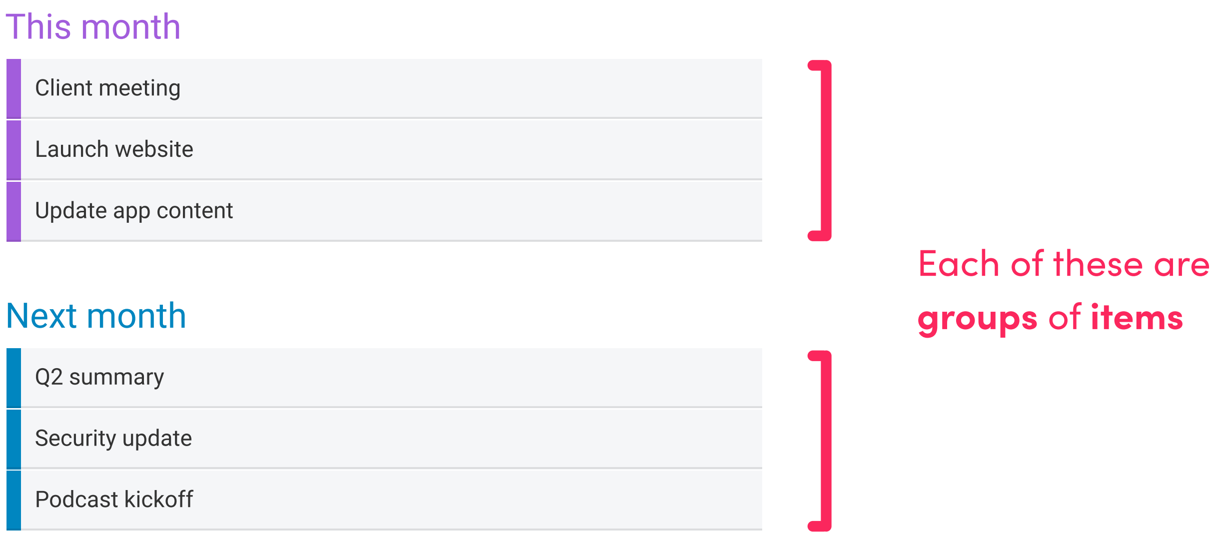
monday.com Structure

Boards, groups and items

Groups:

Groups let you combine related items or categories together within your boards. In the example below, one group is “This month” and another set of items is grouped under “Next Month”. A group can be tailored to your liking, e.g to represent a timeframe, a customer, a team, a product & so on. The group’s color can also be customized to give your groups more visual distinction.

You can freely drag items from one group to another. On the example below, you may want to drag an item from the “This Month” group to “Next Month” if it is delayed or to move an item to a “Completed Tasks” group once it’s marked as Done.

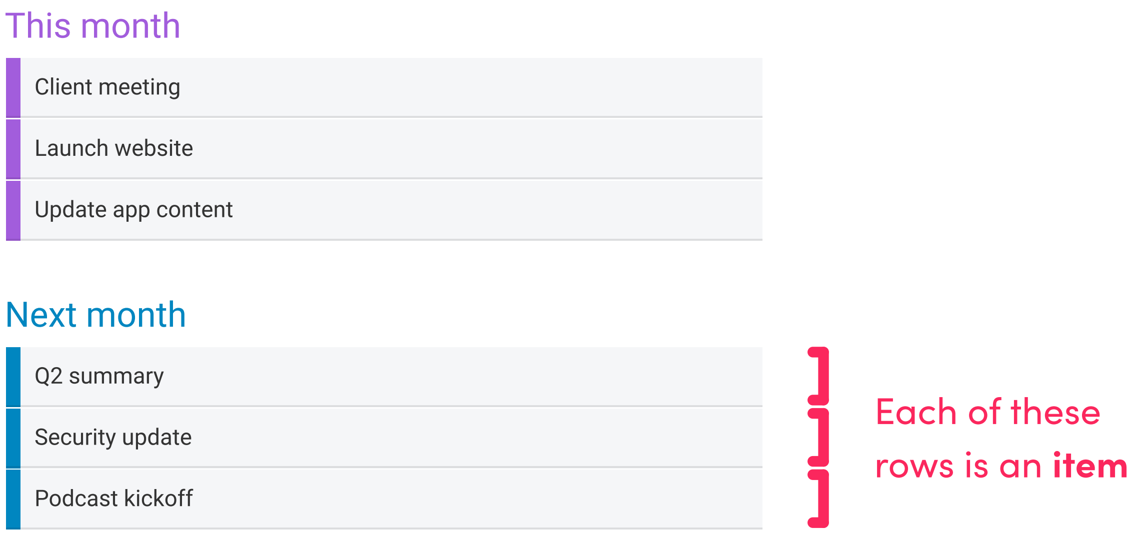


monday.com Structure

Boards, groups and items

Items:

A row is called an item. Items are used to list each component of the group that you want to track. Items can be anything from a task, a person, a meeting or an expense.
Important details can then be captured on each item line by adding columns. Our core columns are "people", "status" and "date/timeline". There are a multitude of column types for you to choose from as you build the framework of your boards.



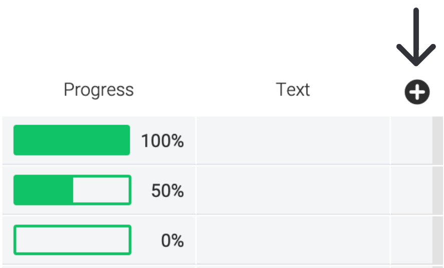
Columns

The new way to organize your data

Columns:

Columns determine how you approach each item and let you define the data you collect within your boards. You can add and customize these as you build out your work flow. If you no longer need a column, you can hide, delete or even convert it’s data into a different column type.

Column Options will range from capturing statuses of items or a dropdown of pre-determined values, collecting numerical data, free text, dates ad timelines, formulas, progress and much more. Our platform has a robust menu of columns options that support many data types.

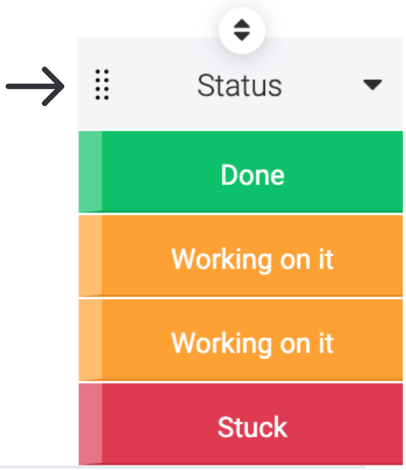


Adding columns

Click on the plus sign to the right of the last column. This will display a dropdown list letting you choose which column type you want to add. Add a column in the middle of your board by hovering over any column label, click on the column menu and select “Add column to the right”. We’ll cover column options in the next few pages.

Moving columns

You can move columns simply by clicking and dragging. Start by hovering over the column label and a handle will appear to the left. Drag that handle right or left as needed.

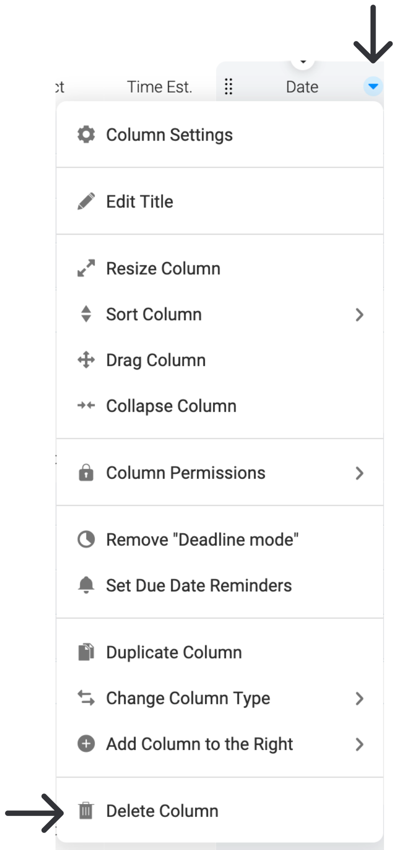


Columns

The new way to organize your data

Delete a column

Hover over the desired column, click the column menu and select “Delete Column”. In case you happen to mis-click you’ll be given the option to “Undo” within 10 seconds.

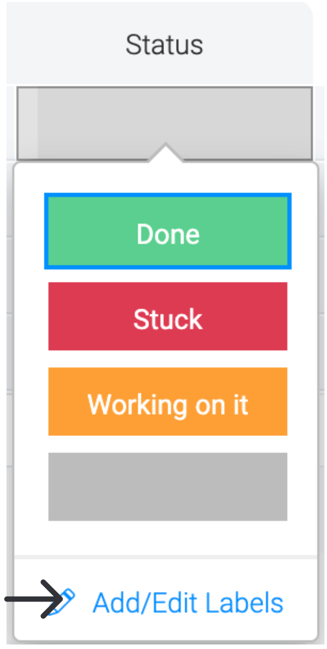


Columns

The new way to organize your data

Our Core Columns

Status Status



This allows you to define statuses (or stages or categories, etc.) that users can select from. The status column is commonly used to display if a task is completed, being worked on, or needs attention.
Although the title of this column is "Status", by clicking the "Add/Edit Labels" you can customize the status labels, allowing you to repurpose this column. An additional Status columns are regularly used to reflect priority of the items.

Text Text

This is exactly what it sounds like! Type in free form text and is useful for capturing critical item notes or descriptions.

People People

This is at the center of driving accountability across the platform. The people columnis used to assign items to individuals, multiple users, or teams, giving them ownership of that item. Each user assigned to the column will receive notifications within their monday.com account, via email or through mobile push notifications depending on their notifiection settings.

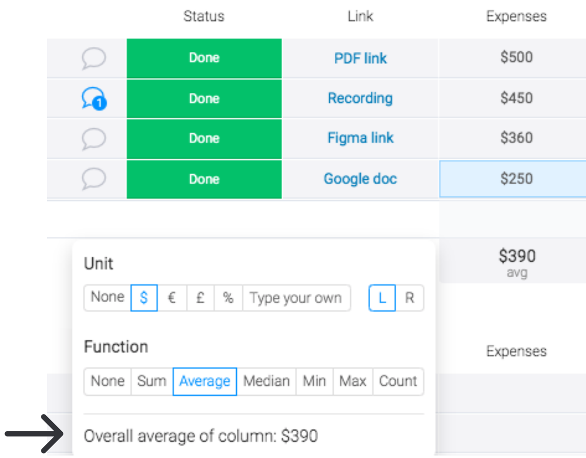
Later we will go over how this column helps with tracking tasks and running reports across your account and setting automations to your workflow.

Columns

The new way to organize your data

Numbers Numbers

If you are tracking expenses or even hours spent on a project, you can use a Numbers column! The numbers column also allows you to make simple calculations of the sum, average, median, minimum, maximum, or a count of all the numbers in the column.



Date column Date

Looking to add a due date to your tasks? Or a start date and start time? Or just any date and time... This column lets you use those dates for notifications on or before that date and gives the option to display your board in a calendar or Gantt chart.

Timeline column Timeline

The Timeline will allow you to visualise all your items in one place against the date range. It's our modern day take on the Gantt Chart.

Tags column # Tags

This field functions similar to social media hashtagging and makes it easy to search and group together associated data, that features across all boards in your account.

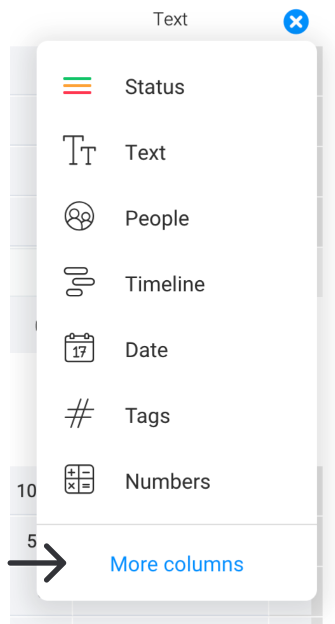
Columns

The new way to organize your data

Additional data type columns

Aside from our Core columns, the platform offers additional data type columns with new types being added regularly! These columns enrich your boards further to manage, track and customize any board & any workflow across the business.

To select one of these additional data type columns, click on the plus sign and select "More Columns". Below are a few of the more popular additions to the Column Center.
(We highly suggest browsing it and discovering them all!)

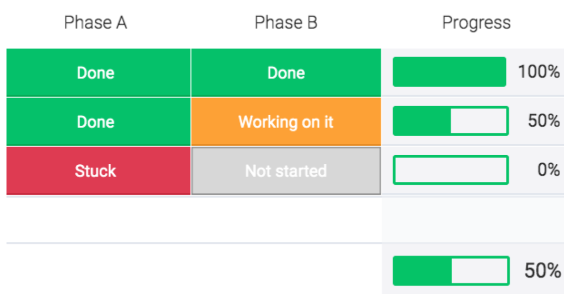


Formula

This column allows both simple & complex calculations between multiple columns such as mathematical equations and If/Then functions.

Progress

The progress tracking column allows you to combine the labels of status columns into one, aggregated battery-like view. You can distibute your weights accordingly to each of the status columns. This column is helpful if you are using several status columns to track the phases & processes for your items.

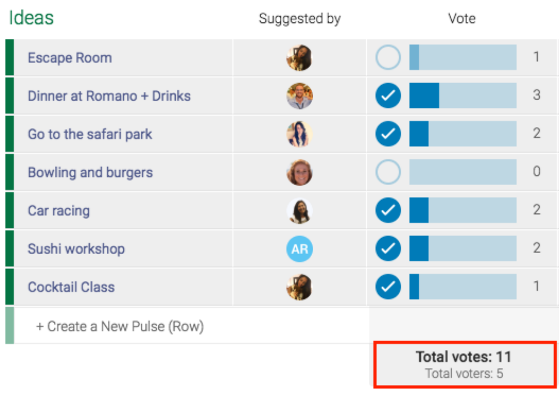


Columns

The new way to organize your data

Vote

Vote for your favourite items on your board and tally votes for each item.



Email

Add emails addresses to the item. The email address will allow you to send and capture emails to and from that contact via board integrations- more info on that in the Integrations chapter of this guide.

Location

By adding addresses and locations for your items, you can visualize your items in a geographic map using our map view.

Link to Item

Link to an item on another board to access data without having to switch between boards. This is commonly used for connecting high-level overview boards with task oriented low-level boards. This is also helpful for collaborating outside of your organization by letting you pull information from boards you share with external partners, into internal boards that aggregate sensitive information.

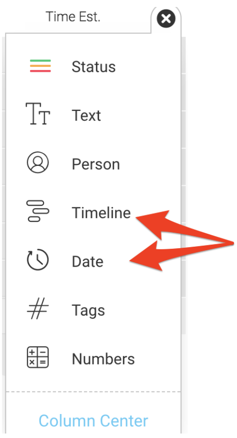
Deadline mode

Stay on track and meet your deadlines

Deadline mode links your date or timeline columns with a status column to help you stay on track via notifications, custom MyWeek functionalities, and improved visualizations.

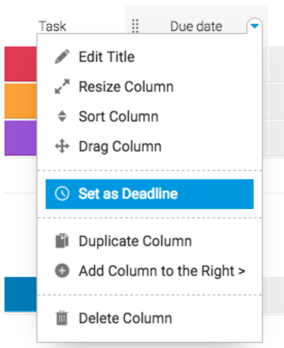
Step 1

Ensure that you have a 'Date' or 'Timeline' Column and at least one 'Status' Column in your board.



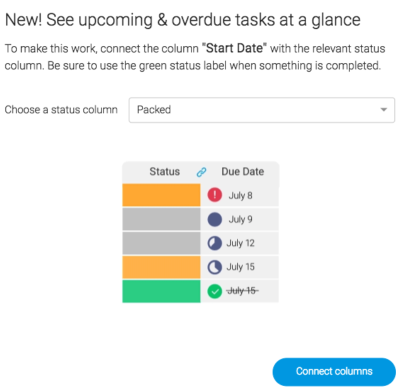
Step 2

Click on the column menu on the 'Date' or 'Timeline' column that represents your deadline. Select "Set as Deadline".



Step 3

You will see a screen which asks you to connect the 'Date' or 'Timeline' Column with a 'Status' Column.



Permissions on monday.com

Control your data

Board permissions & restrictions give the owner of the board the option to control what information can be changed and who can change it. This can be used to maintain the structure of your board and prevents columns from being rearraged, editted or deleted. This is especially helpful for boards with a large number of collaborators and also boards shared with external guests whose access you want to limit only to the portions of your project they are responsible for.

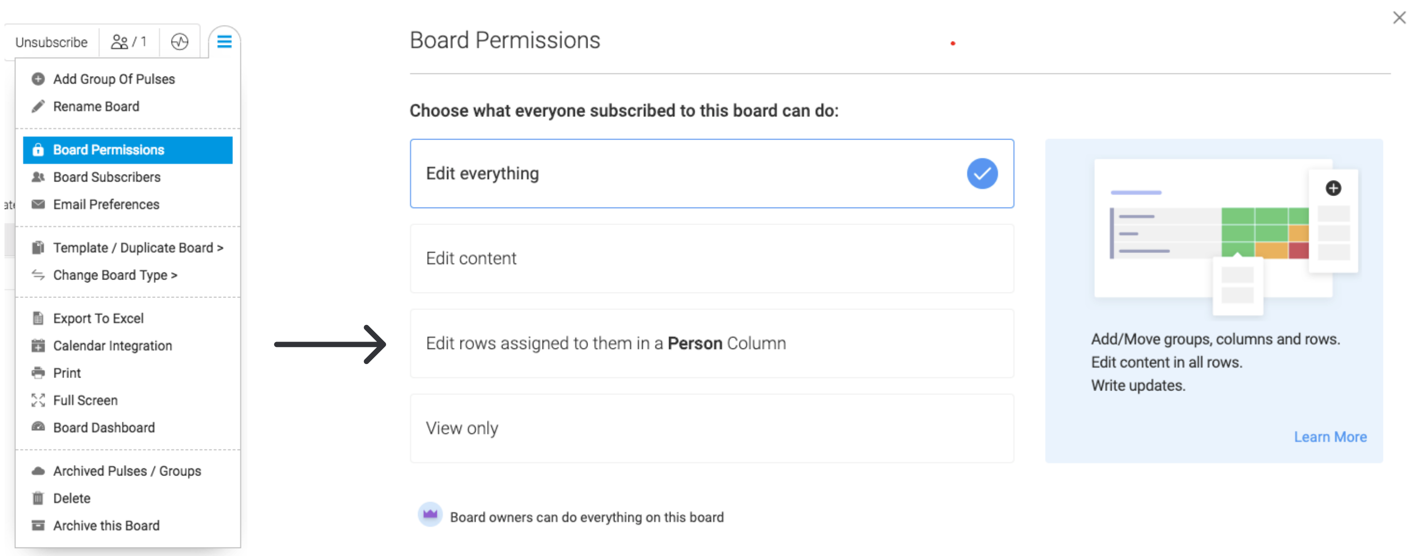
Setting board permissions

Step 1

Before setting board permissions, you should first designate the owner(s) of the board. By default, the owner is set to the user that created the board. To add more owners, click on the people icon located on the upper right corner of your board. Clicking on crown next to the users' names turns the crown blue and signifies they are a board owner.

Step 2

To edit board permissions, click on the menu icon located in the upper righthand corner of your board as pictured below:



Permissions on monday.com

Control your information

What are the different permission options ?

Edit Everything

This is the deafult option which means that everyone that is subscribed to the board is able to change the content and structure of the board, add new items, edit columns and items and change column names.

Edit Content

This permission restricts non-board owners from editing the groups or column titles, adding columns or rearranging the structure of the board. They will be able to add items, update column content, and post item updates.

This setting is great for maintaining the structure and integrity of your board as you collaborate with large groups or users outside of your organization.

View Only

Under View Only, Non-board owners are restricted to posting item updates only. They are not able to edit, add or update any content on the board. This setting is helpful when you want keep teammates, clients, managers updated on your process & progress but do not want them to be able to make any changes.

Edit by Assignee

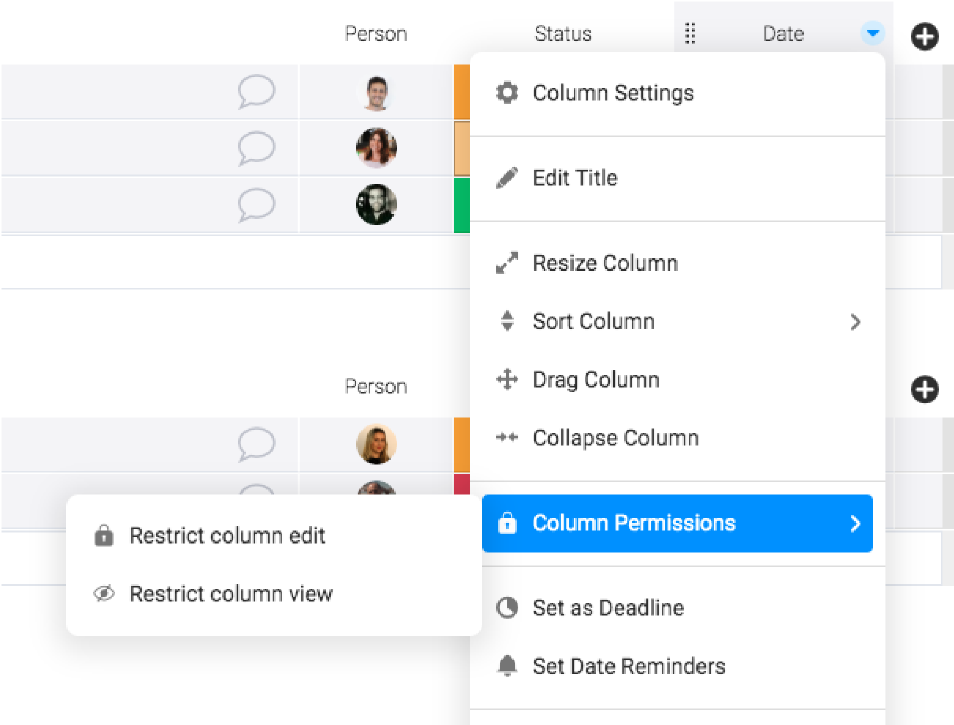
Available only on our Pro & Enterprise plans, this permission allows non-board owner to only edit content on items assigned to them in the people column. This is a great option when collaborating across various teams.

Permissions on monday.com

Control your information

Restricting Column View

With this permission level you can restrict the view of any column on your board to designated users. This will help you make sure that your team members and guests only see the data you'd like them to see. This is helpful for streamlining your process into one board, but keeping sensitive data such as budgets or personal information available only for relevant teams.

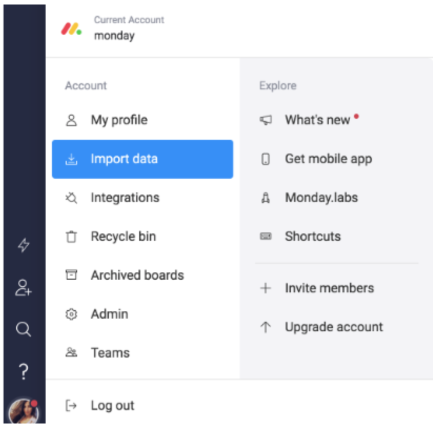


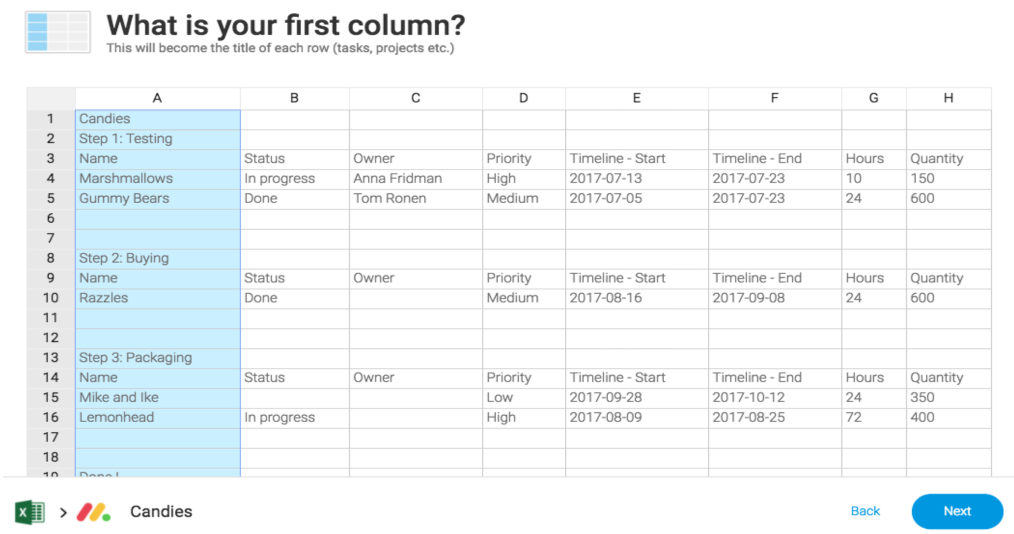
Import from Excel

Move your work easily into monday.com

Importing an excel spreadsheet:

To import a spreadsheet into a new Board, click on your avatar image at the bottom left of the navigation bar and select “Import data”.





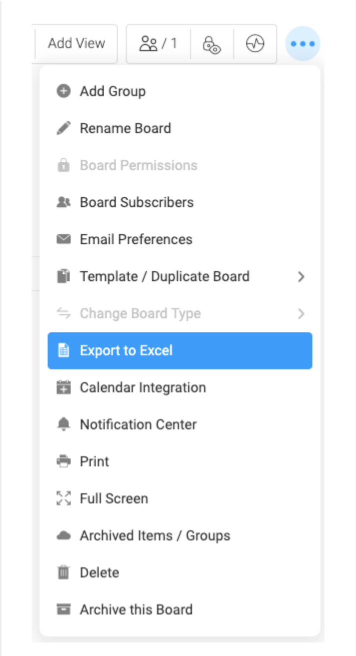
	A	B	C	D	E	F	G	H
1	Candies							
2	Step 1: Testing							
3	Name	Status	Owner	Priority	Timeline - Start	Timeline - End	Hours	Quantity
4	Marshmallows	In progress	Anna Fridman	High	2017-07-13	2017-07-23	10	150
5	Gummy Bears	Done	Tom Ronen	Medium	2017-07-05	2017-07-23	24	600
6								
7								
8	Step 2: Buying							
9	Name	Status	Owner	Priority	Timeline - Start	Timeline - End	Hours	Quantity
10	Razzles	Done		Medium	2017-08-16	2017-09-08	24	600
11								
12								
13	Step 3: Packaging							
14	Name	Status	Owner	Priority	Timeline - Start	Timeline - End	Hours	Quantity
15	Mike and Ike			Low	2017-09-28	2017-10-12	24	350
16	Lemonhead	In progress		High	2017-08-09	2017-08-25	72	400
17								
18								

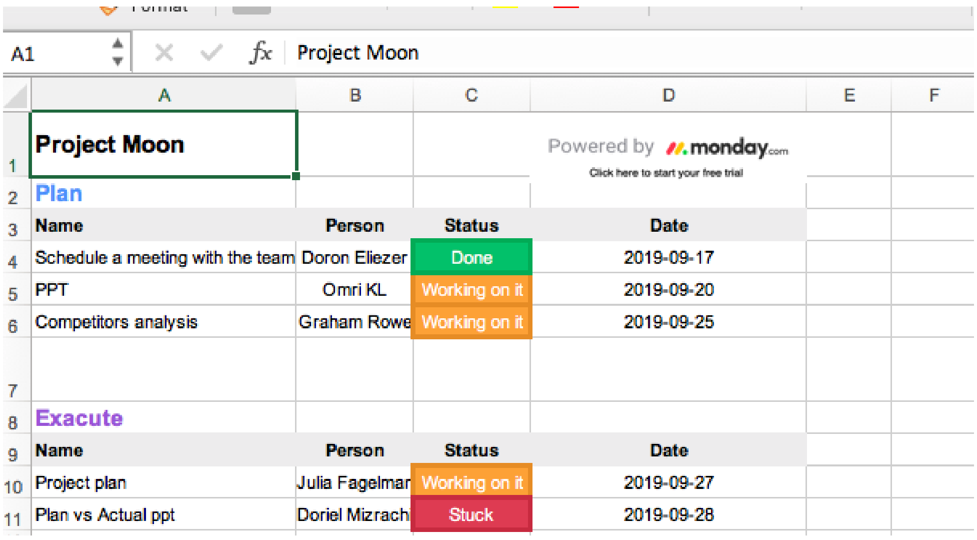
Export to Excel

Export your data and share it with other stakeholders

Exporting an excel spreadsheet:

Click the Board menu on the upper righthand corner of your board and select "Export to Excel”. Either choose to export only the board information or include the updates from the items.





	A	B	C	D
1	Project Moon			Powered by monday.com Click here to start your free trial
2	Plan			
3	Name	Person	Status	Date
4	Schedule a meeting with the team	Doron Eliezer	Done	2019-09-17
5	PPT	Omri KL	Working on it	2019-09-20
6	Competitors analysis	Graham Rowe	Working on it	2019-09-25
7				
8	Exacute			
9	Name	Person	Status	Date
10	Project plan	Julia Fagelmar	Working on it	2019-09-27
11	Plan vs Actual ppt	Doriel Mizrach	Stuck	2019-09-28

Team Communication

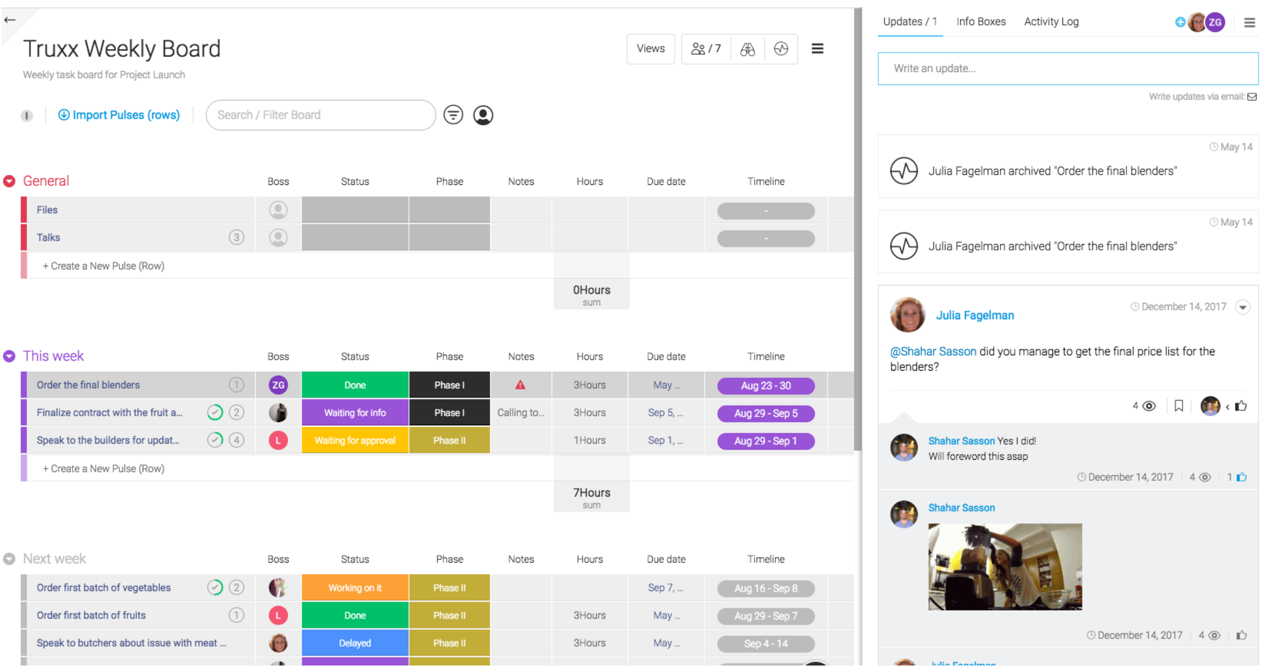
Sole communication platform within your workspace

One of the most meaningful ways monday.com drives greater efficiency & collaboration amongst teams is by enabling you to communicate in context. No more long email threads and ambiguous references- every comment, question, and status update is always connected to an item and project history is readily available.

Communicating in context

The best way to give your team informed about your tasks and projects is by using the updates section in your items. When you click on an item in any of your boards, a box opens to the right of the screen and the “updates” section is the default tab.

An update can be anything related to your item (e.g., update, question, comment, description). You can @mention a user, a team or eveyone on this board/account to ensure they the relevant people are notified that the update requires their attention. The eye icon on the updates indicates who has seen the update.

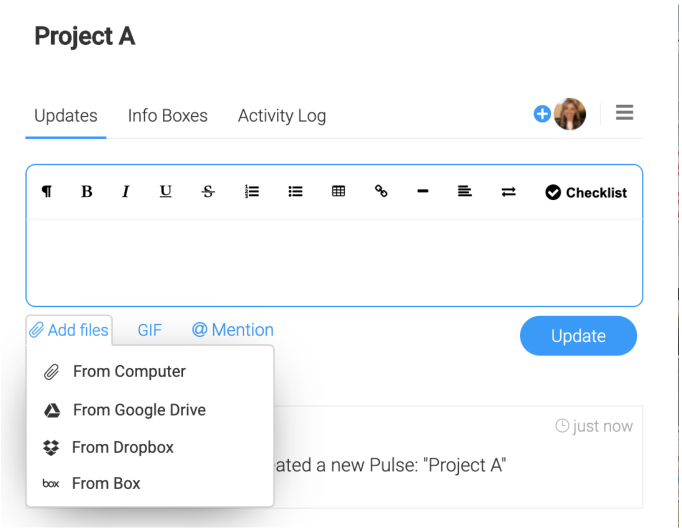


Team Communication

Sole communication platform within your workspace

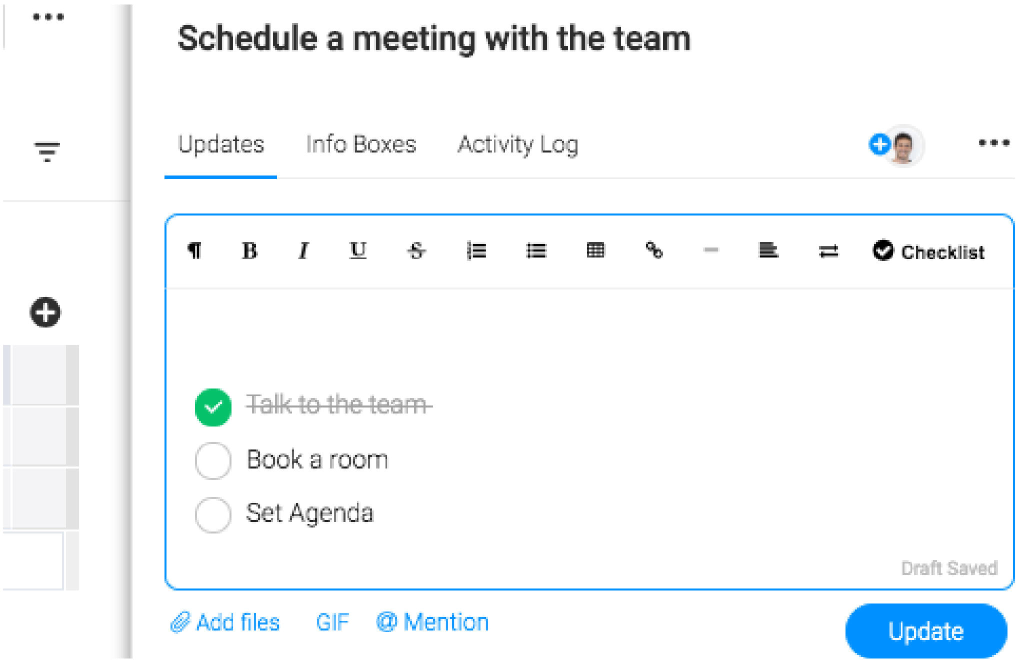
Attaching Files

You can even attach files to your updates and share documents in the context of the item they relate to. Upload files from your computer, Google Drive, Dropbox or Box.com.



Creating Checklists & Action Items

Does your task have a number of steps which should be completed before it can be marked as "Done"? Add a checklist to your update to track these steps!

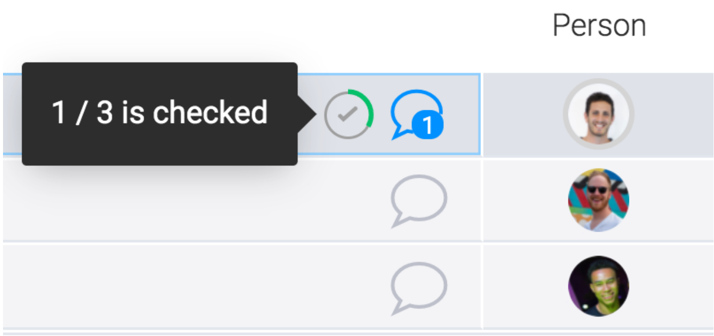


Team Communication

Sole communication platform within your workspace

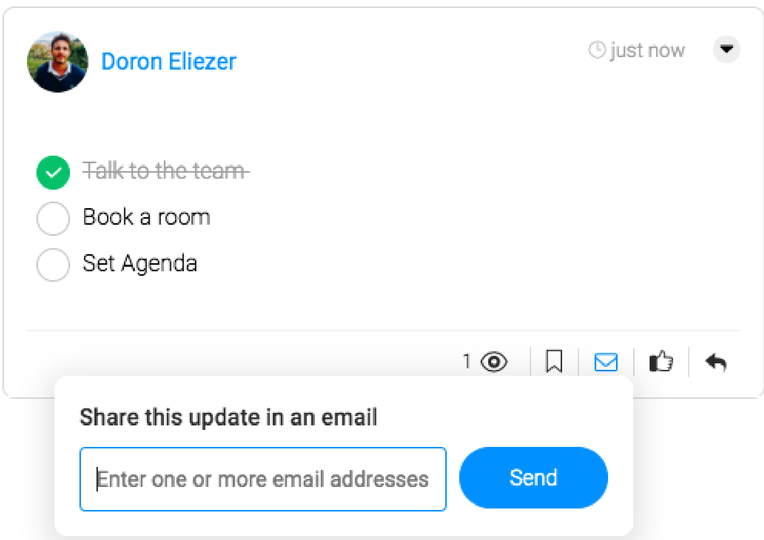
The Checklist Status

The status of the checklist now appears on the item on the board level, allowing you to see how far along your team is to making the item ‘Done’!



Sharing Updates via Email

Share your updates with external stakeholders and non monday.com users to keep everyone in sync.

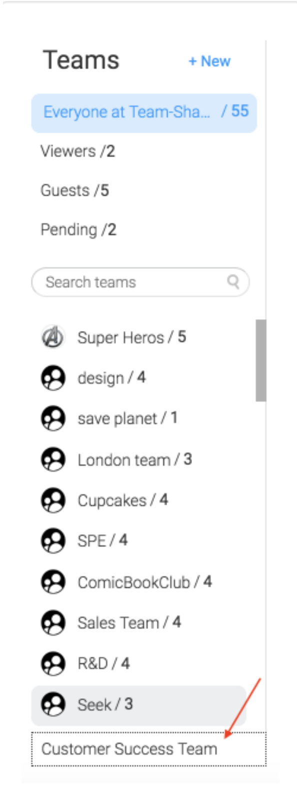


Boost Efficiency with Teams

Take communication, notifications and permissions to the next level

Creating Teams has multiple advantages:

1. Subscribe entire teams or groups to boards and dashboards in one click
2. @mention an entire team in the updates
2. Assign a team to an item
3. Make onboarding easier on yourself. Add a new user into a team and they will automatcally be subscibed to all boards that their team is subscribed to.



Creating a new Team

Click your Avatar (lower left) and select Teams from the menu.
Then, click on "New" on the top right and name your Team.
Add users / viewers to the Team. A user/viewer can be in mulitiple Teams!

By creating Teams, this will take out alot of manual work as you no longer need to subscibe, assign or @mention people individually. It will also allow you to notify a team in one go via our Automations- more of that to come!

Views

Visualizing your data to help you draw insights

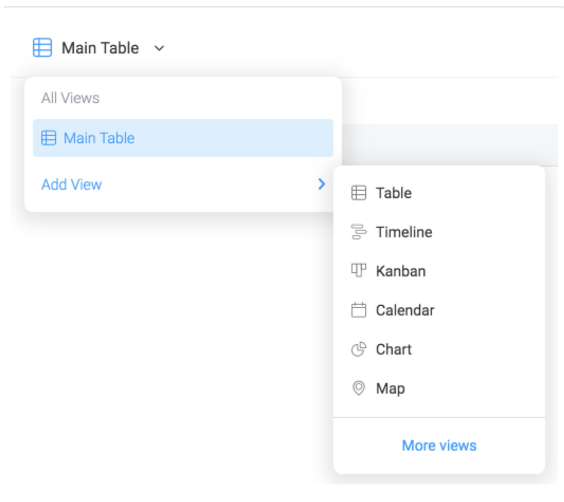
What are the board views?

monday.com was built on the philosophy that everything should be visual- boards, graphs, status updates, everything! We truly believe a picture is worth a thousand words and can help your team operate more effectively.

Board Views will allow you to visualize and present your board's information from multiple perspectives, letting you convert data into actionable insights!

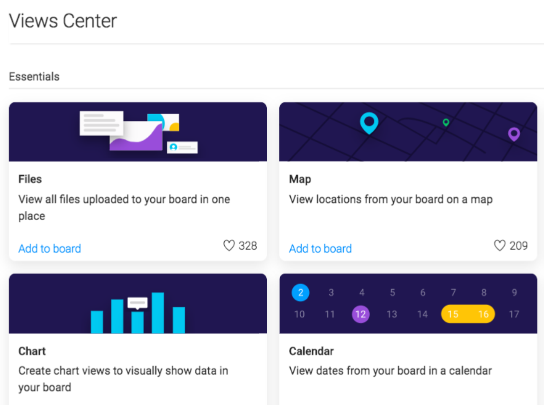
Adding views

To add a board view, click on the arrow next to the button "Main Table" located in the top lefthand corner of your board.
Select "Add View":



Views Center

You can also click on "More Views" to access our view center with other useful visualizations.



Views

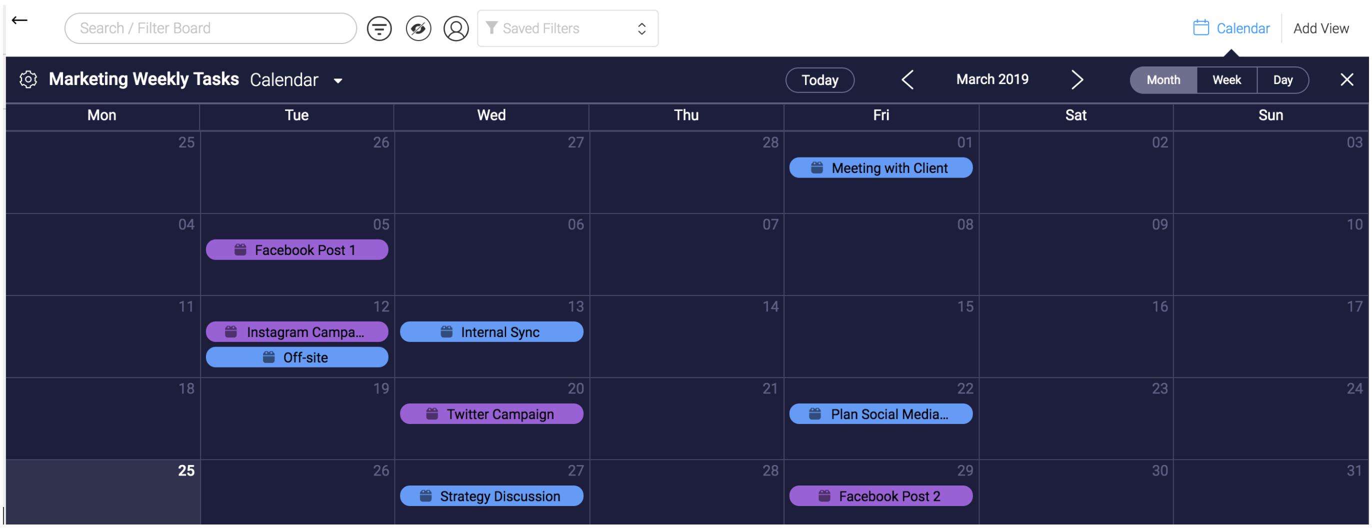
Visualizing your data to help you draw insights

Timeline View

Present the content of your Board in a Gantt view to demonstrate the date ranges of your items. Toggle between days, weeks, months and years and fiter by many variables on your board; people (as below) groups, statutes, tags and more.

Calendar View

Visualize your items in a calendar format. Toggle between days, weeks, or months.

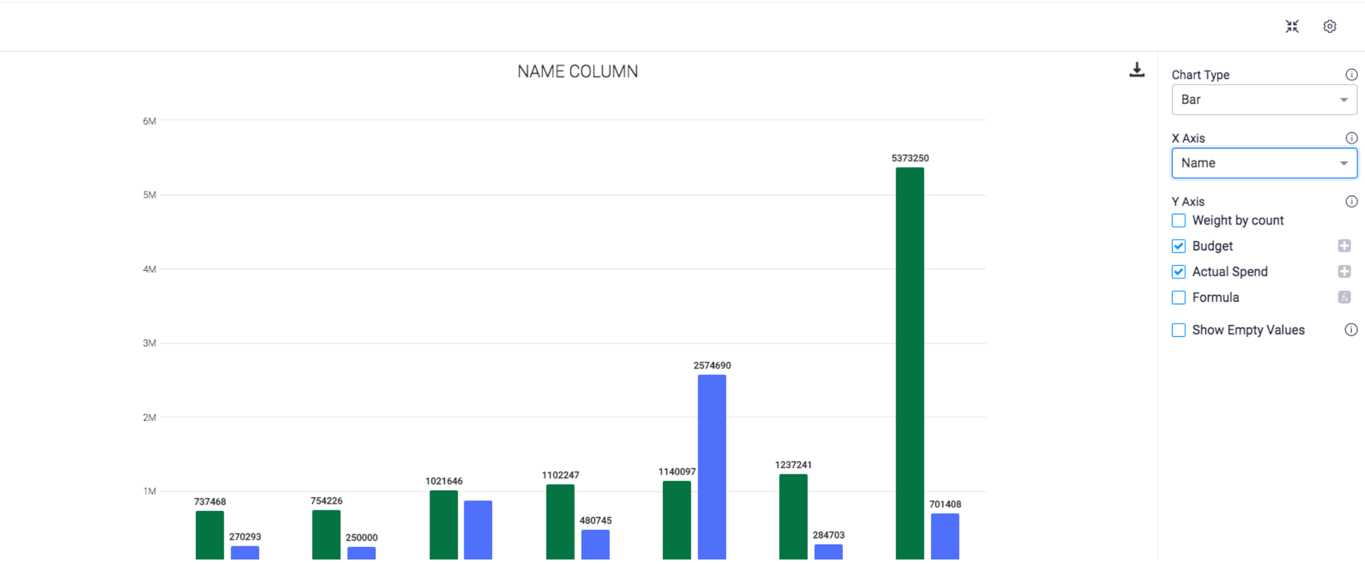


Views

Visualizing your data to help you draw insights (or formalize your intake process)

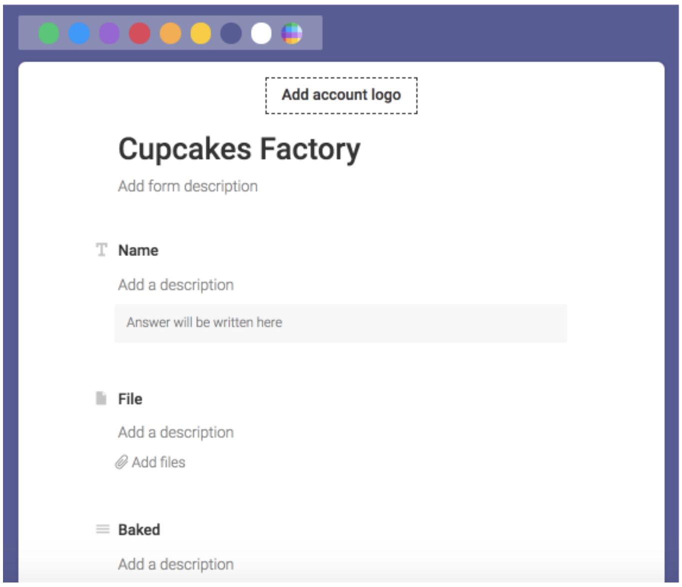
Chart view

Generate graph types with your board data. This is commnly used for tracking totals, time tracking, and even resource allocation.



Form view

Instead of receiving external forms and then spending time transferring that infromation into the platform, you can create and customse your own monday.com form that will be submitted directly into your boards.



Views

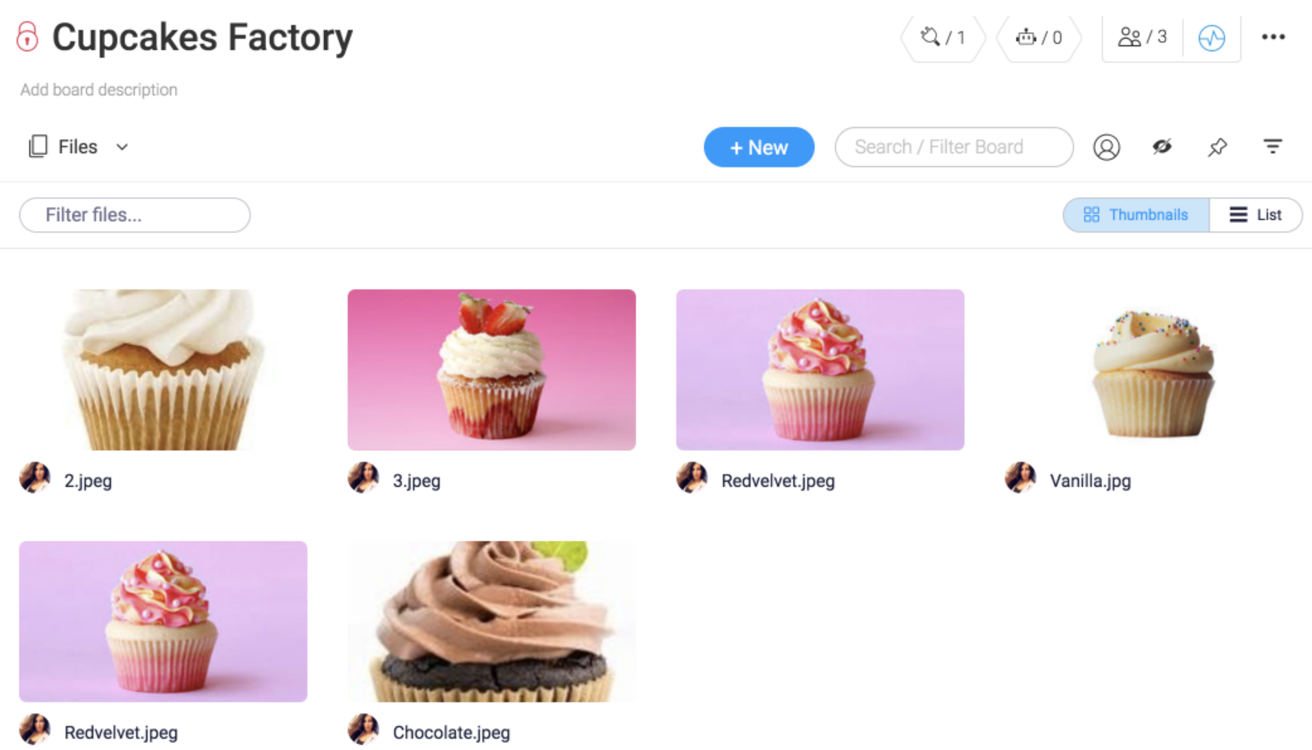
Visualizing your data to help you draw insights

Map View

Transfer your Location or Country column into a Map View. This is helpful for identifying imporant regions, planning business trips or even establishing your next office.

File View

Easily manage all your files associated with your board. Any files uploaded to the updates or File column will be pooled together in one, easy to locate spot.



monday.com Automations

Making the platform work for you

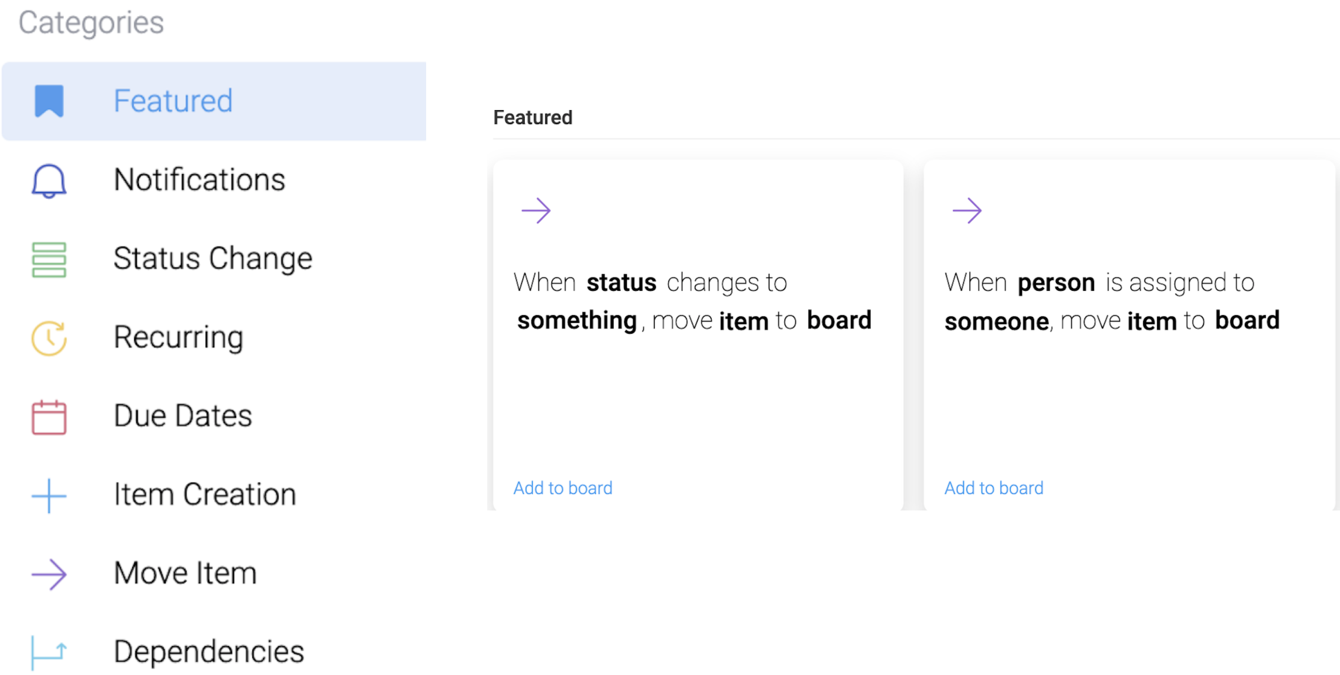
Cut out time-consuming tasks throughout your day by letting the platform do the work for you. This can range from sending a reminder when a deadline is approaching to moving items around the board when a condition is met.

They work by using an event inside monday.com (like the changing of a status) to trigger an action (like sending a notification). The best part is that they're easy to implement using the pre-built automation recipes that we've created for you in our Automation Center.

Adding Automations

Automations are unique to a board. To add an Automation, click on the Automation (robot) icon, located on the upper right of your board.

Once in our Automation Center you have a wide variety of useful automation recipes to choose from. Add as many automations to your board to automate your workflow and sit back whilst monday.com does the jobs that you hate to.



monday.com Automations

Making the platform work for you

Customizing Your Automation Flows

Automation flows are combinations of triggers and actions (which we've written for you) with customizable variables that map to components of your boards.

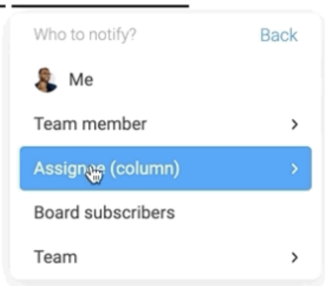
Let's walk through a simple example: creating an recurring, automated notification to item owners when the item they are responsible for is in a specific status.
First, you'll search the Automation Center for the variables "notify" and "status". The best recipe for this in our Automation Center is as such:

When status is something, notify someone every time period

In this instance, the trigger will be a chosen "Status" column changing to a designated label, where both parameters are chosen by you (i.e. which status column and which label). This trigger will cause the action (a notification, with customizable phrasing being sent to the associated assignee).

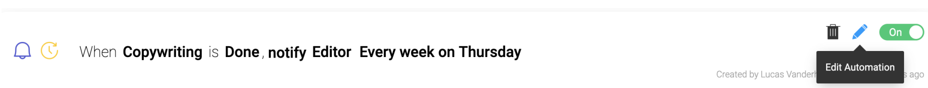
When Copywriting is Done, notify someone

Every week on Thursday



Editing Automations

Once you have added Automations to your board, you can toggle Automations on and off using the switch icon. Use the pencil icon to edit the Automation or the trash can to remove it from the board.



monday.com Integrations

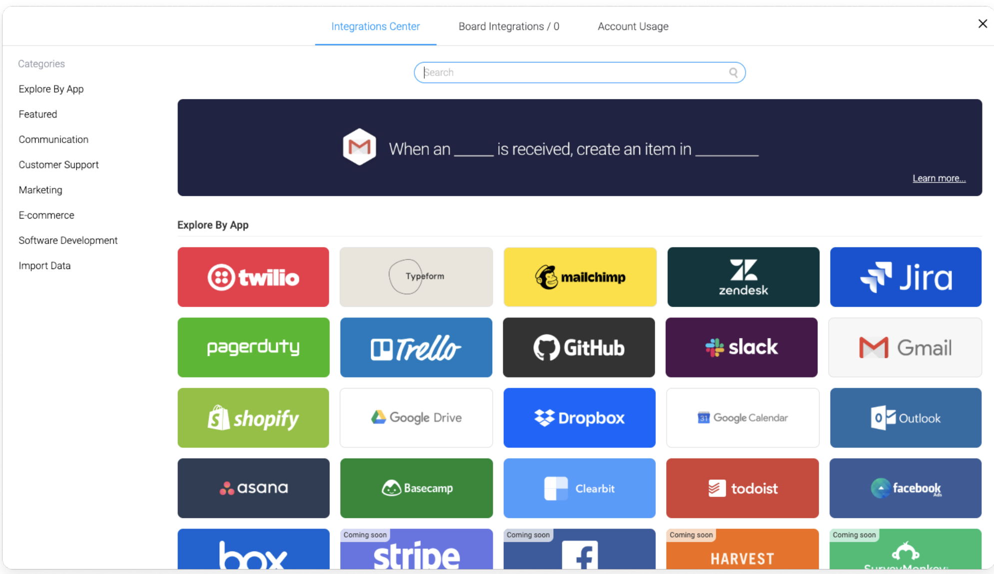
Leveraging monday.com as a central hub across your other platforms

Connect monday.com to external platforms and use monday.com a central hub. Similar to Automations, Integrations can be applied by using predefined Integration recipes that we've created for you to use.

Adding Integrations

Integrations are also unqiue to each board. To add an Integration, click on the integration icon (plug) located on the upper lefthand corner of your board.

This directs you to our Integrations Center:



Setting Up Integrations

Choose your desired platform and select your Integration recipe and set the parameters.

monday.com Integrations

Leveraging monday.com as a central hub across your other platforms

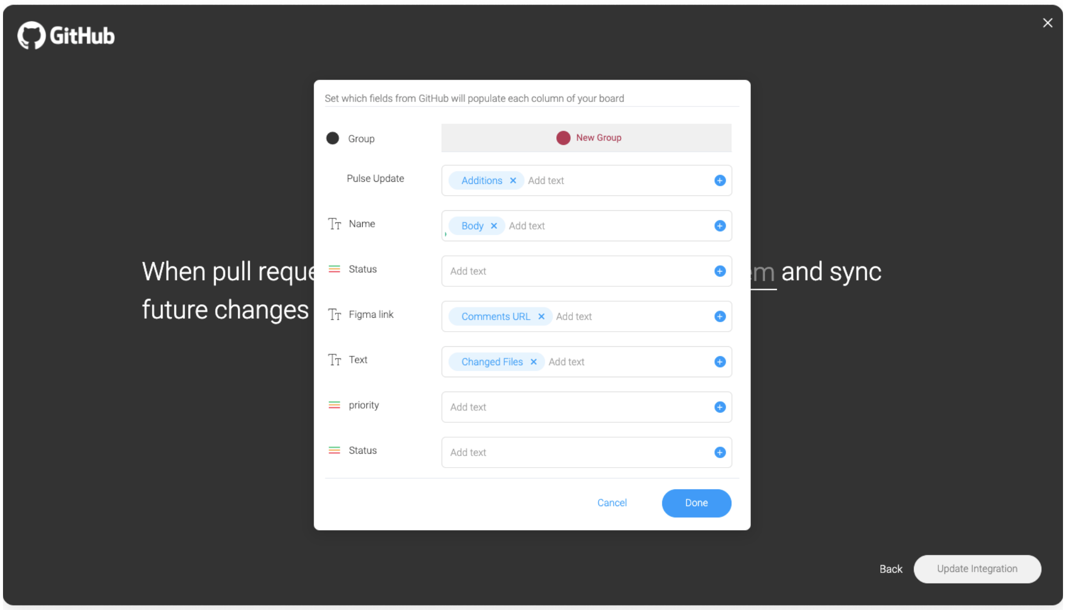
As with Automations, the greyed & underlined fields are parameters you can customize and/or map to information in your board.

Taking the Gmail Integration as an example, the below recipe allows us to send an email via Gmail when a status changes to a specified label. The email message is fully customizable and can be sent out to multiple users at once.

> When status changes to something, send an email to someone

Mapping Conditions Between Different Platforms:

When setting your integration, you can select what data will be mapped into each column. Let's take our Github integration as an example:



How To Use The Integration Column

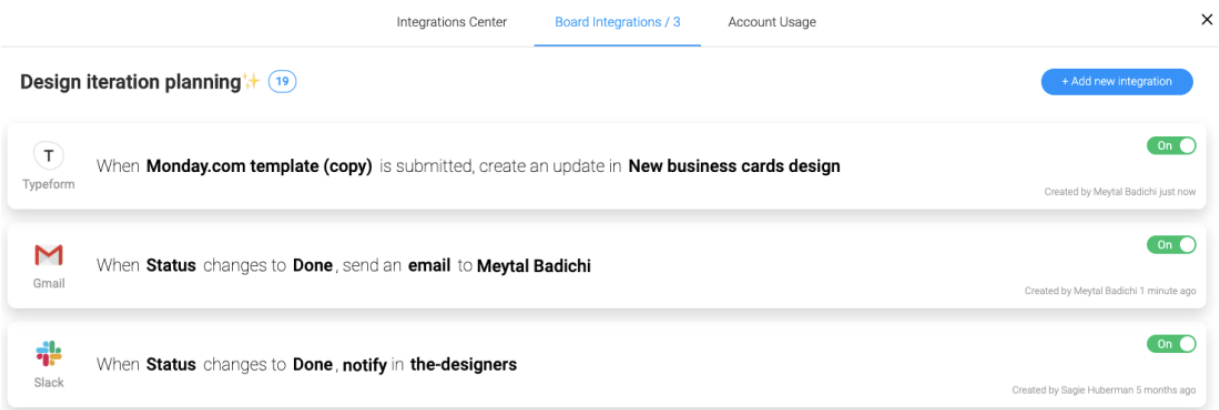
When creating a mapping based integration, the integration column will be added automatically with a tip that will explain the column purpose & how to maintain the connection between the parameters in both apps.

monday.com Integrations

Leveraging monday.com as a central hub across your other platforms

Editing & Deleting Integrations

Once you have added Integrations to your board, you can toggle Integrations on and off using the switch icon. Use the pencil icon to edit the Integration or the trash can to remove it from the board.



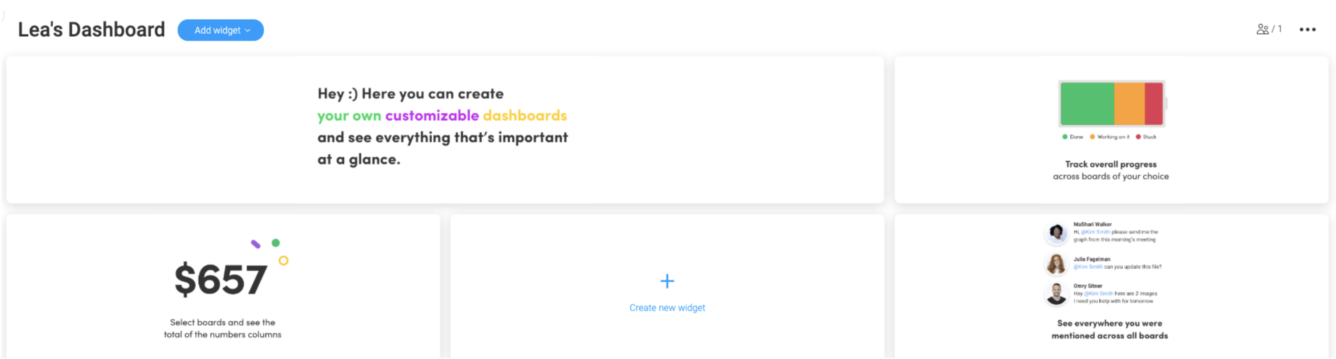
monday.com Dashboards

Management overview of all your boards

Dashboards are a great way to display what's most important in one place. With dozens of available widgets, users can aggregate data across boards and have a pulse on overall budgets, cross-project timeliness, and org-wide resource allocation! With the ability to easily display this information, dashboards allow you to keep your team focused and motivated on the high level goals and boost productivity!

How Do Dashboards Work ?

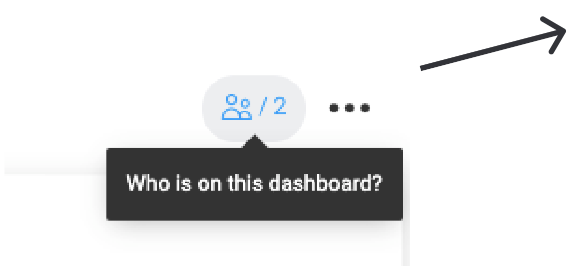
Dashboards are made up of widgets, that work by combining information across boards and reporting on what is happening across boards. Fully customizable, they can be as laser focused or top level as you want them to be. Upon selecting a widget for your dashboard, you can select which boards you'd like to pull data from and which groups to include. Widgets can total numbers, display charts, countdown to a date, and even visualize your progress with cute, colored llamas!

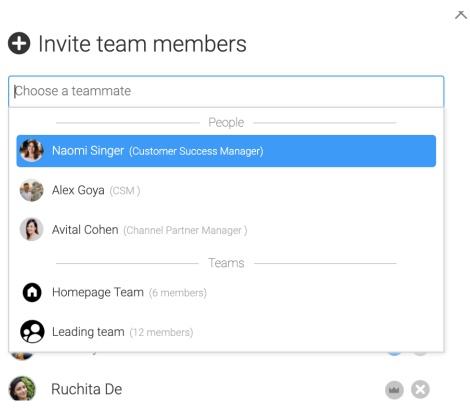


Who Can See my Dashboard ?

Like boards, dashboards can be seen by subscribers. You can share your dashboards with your team members by clicking on the person icon located on the upper righthand corner of your dashboard and adding teams or individual users.

Keep in mind that these users must also have access to the boards that your dashboard is pulling information from.



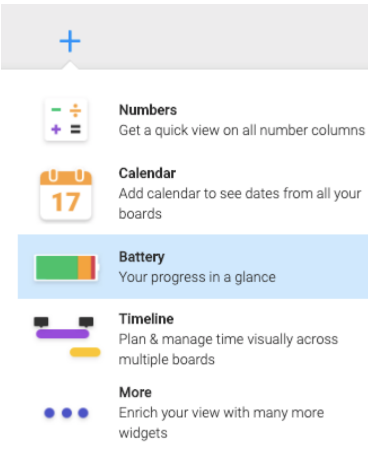


monday.com Dashboards

Management overview of all your boards

Building Your Own Custom Dashboard

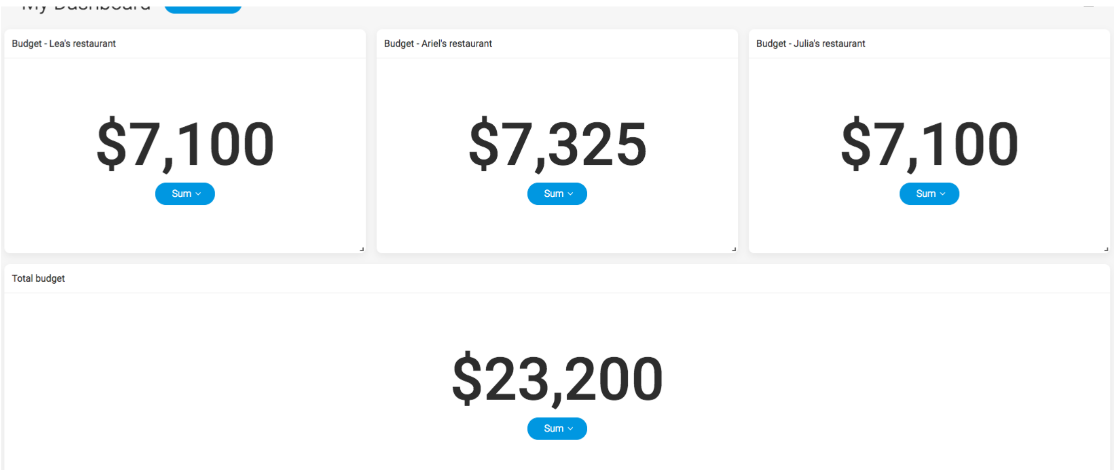
To add a new widget, simply click on the + icon and select the type of widget you would like to display. Keep in mind you can rename and resize your widgets to make them stand out. Next, let's review some of our most popular widgets!



Progress and Analytics Widgets:

The Numbers Widget

Aggregate any numerical column you have on your boards. This widget is helpful for tracking budgets, revenue or total tasks completed. The number displayed can be formatted per the type of total you are tracking.

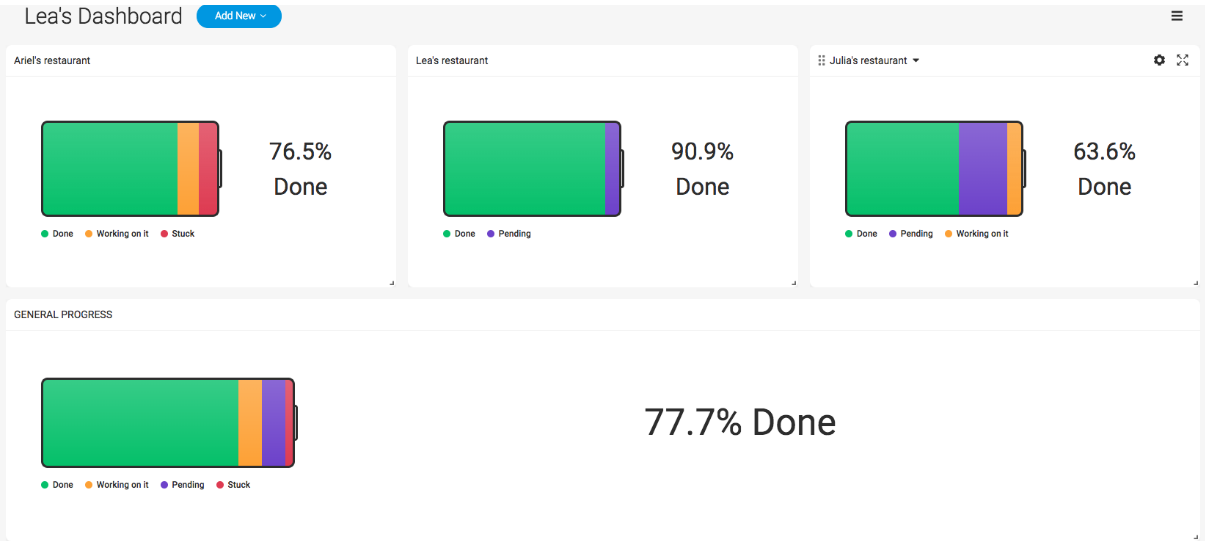


monday.com Dashboards

Management overview of all your boards

The Battery Widget

The battery widget allows you to keep track of the progress (via status columns) of your boards. You can combine the statuses of several boards in one single battery widget to get an overview. As you click on the statuses in the battery, it will drill down into all the items that correspond to that status label.



The Chart Widget

A great way to visualize the aggregated data across your boards. Similar to the Chart View, this widget is helpful for visualizing totals, resource allocation, prioritity projects, and slicing data by the various custom labels used in your status columns.

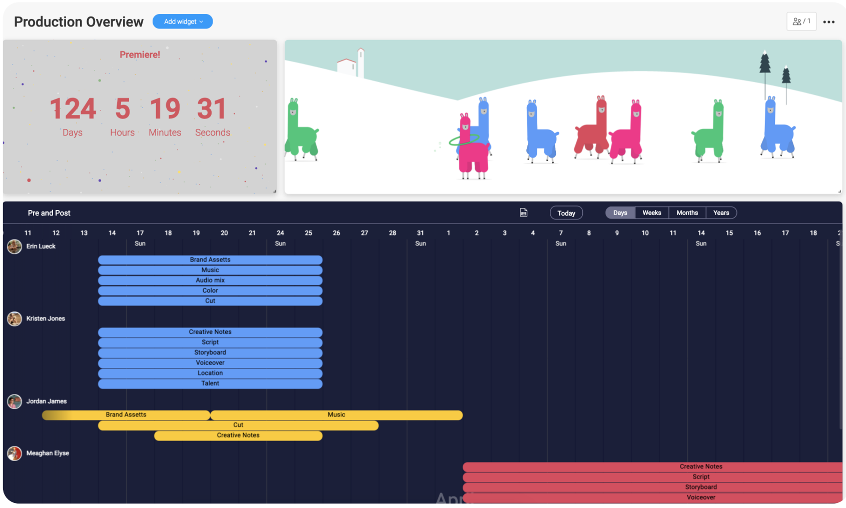
monday.com Dashboards

Your 'air traffic control tower' for all things important

Time based widgets:

The Timeline

Pull timeline columns from several boards and gather them all in a single view! This widget is a must have to enhance your workflow, especially for Gantt chart lovers! Timelines can be displayed by person columns, groups, and more!



The Calendar

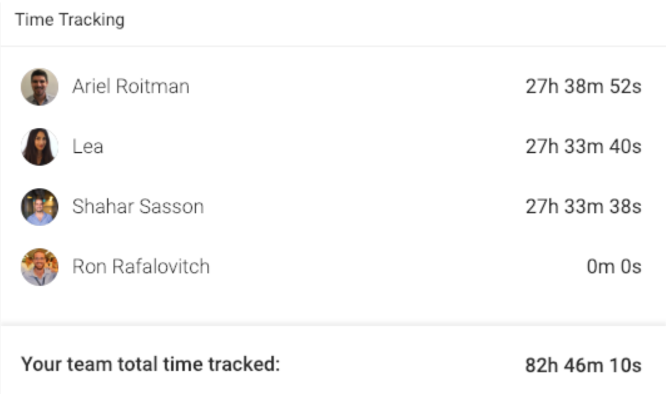
A high level picture of the key dates & milestones across your boards and helps you stay on track with many competing priorities.

monday.com Dashboards

Management overview of all your boards

The Time Tracking Widget

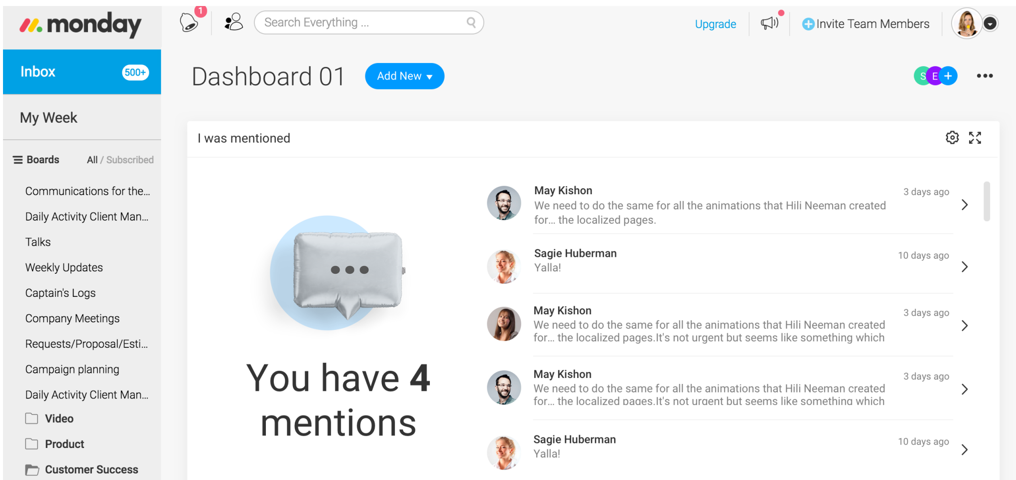
Want to see how much time each team member has spent on tasks across your boards? The Time Tracking widget shows total time spent on items across multiple boards—both on an individual level (for the people assigned) and for the entire team! It's great for resource management, making sure there's a fair spread of work across the team and for easy reporting against billable hours.



Personal Use Widgets:

The 'I Was Mentioned' Widget

Never miss an update you were mentioned in again! See every update you were mentioned in, in one clear view with the "I was mentioned" widget. You can even customize it so you see only the types of mentions you want to see, within a timeframe of your choice!

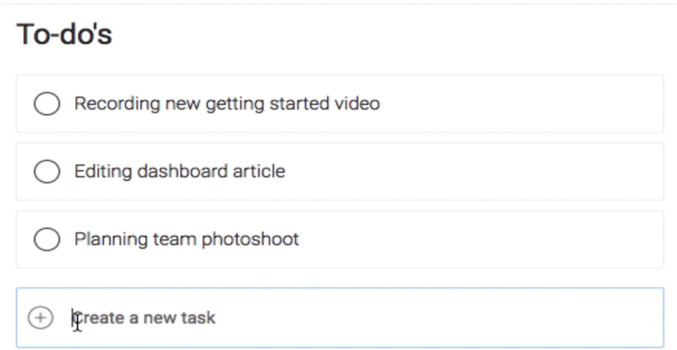


monday.com Dashboards

Management overview of all your boards

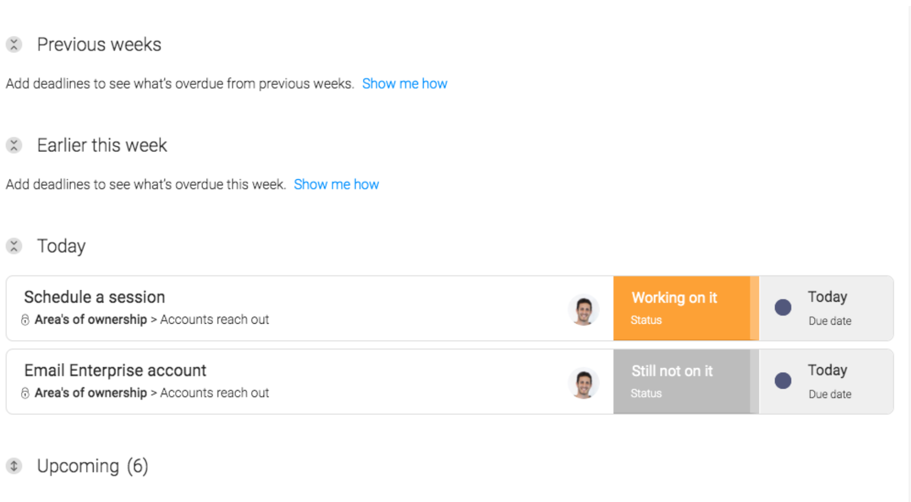
The To-Do Widget

Add tasks that don't quite belong to any board and keep track of the small tasks you've completed.



The "My Week" Widget

Display your priorities in "My Week", side by side with other critical data from your widgets. See everything that you and your team need to accomplish this week next to widgets representing key dates, milestones, Timelines and your budgets.



There's Still Much More!

Head to your Dashboards to see the rest of our amazing Widget options.

Resources

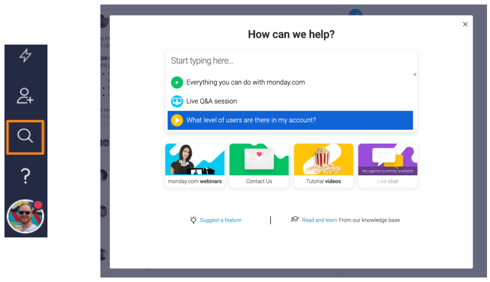
From getting started to becoming a pro - we've got you covered

Our support center

We have a lot of great resources available for you to make sure you are making the most out of the platform.

Our Support Center

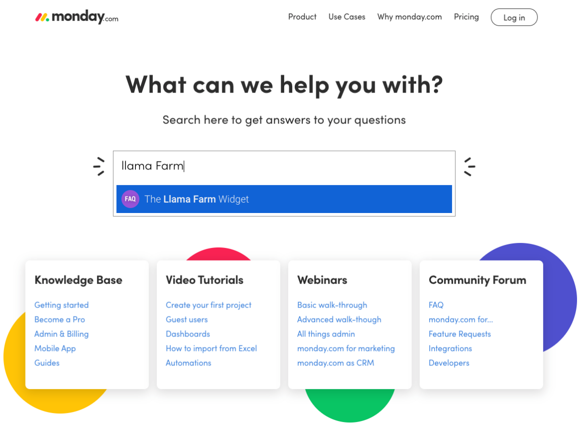
Your one-stop shop for technical answers and video walkthroughs. Get to it easily by clicking on the magnifying glass on the lower left side of your screen!



Support Articles

Did you know that every monday.com feature has its own support article? From how to set up the feature to advanced tips and tricks. You can find our support articles at support.monday.com.

From there simply type in the topic you would like to learn about and select the relevant article. Most articles even include videos!



Webinars and Videos

In addition to articles, we have many video resources such as:

Daily live webinars ranging from Basic and Advanced walkthroughs

These dive deep into specific use cases- https://monday.com/webinars/

How-To videos- https://monday.com/lp/videocenter

monday.com YouTube Channel

Everything from a quick 2-minute feature overview and summarized walkthroughs to our ads that have more than 13 million views-

https://www.youtube.com/channel/UCA9UvBiKHly15rN8u_Km3BQ

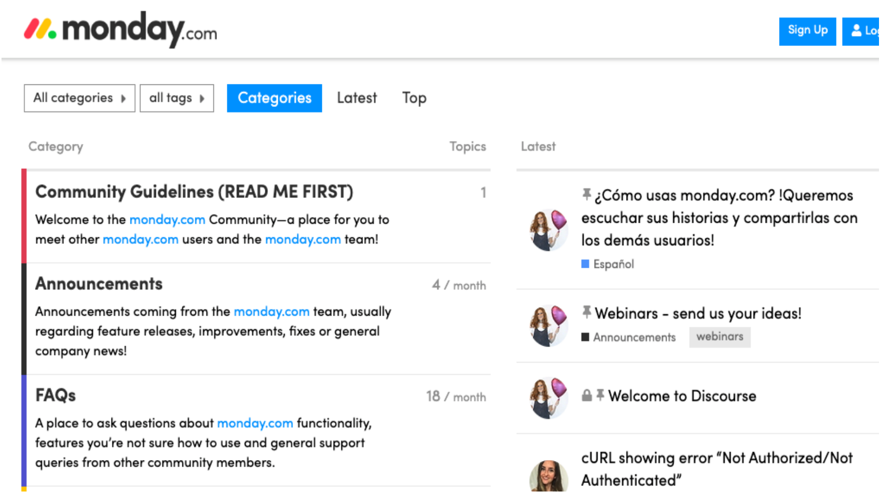
Resources

From getting started to becoming a pro – we've got you covered

Our support center

Community

An interactive online community of monday.com members that share ideas, ask questions, explain how they've applied monday.com and disucss how it has helped their team collaboration skyrocket! Find it at: community.monday.com



Support Tickets

Support tickets – Still have an issue? We'd love to help! Our support team is available for you 24/7/365. Feel free to record a video of the issue and send it to us to help us get a resolution ASAP!