

Using monday.com as a viewer

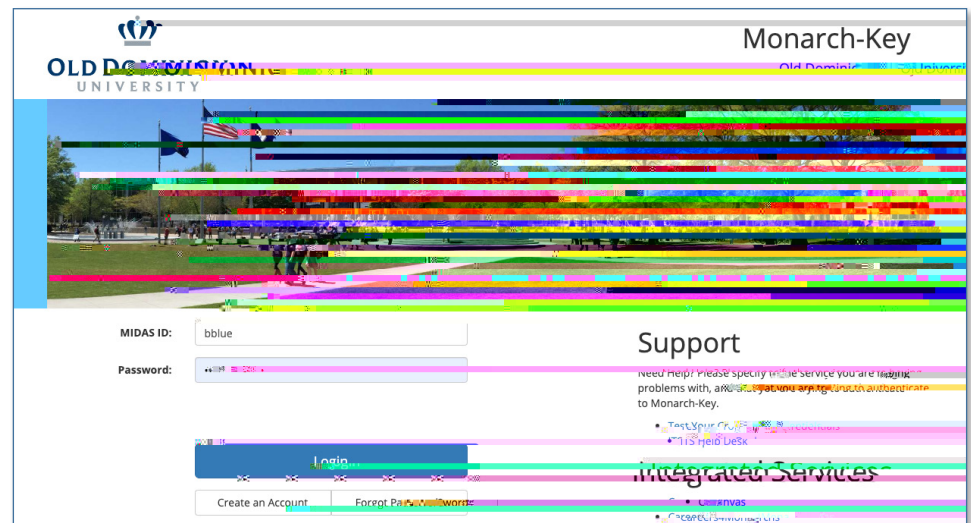
Log in to monday.com

1. Go to oduglobal.monday.com and click **Log In** **SAML**

A



2. Log in with your MIDAS ID and password.



3. You'll start in the **Monday.com**



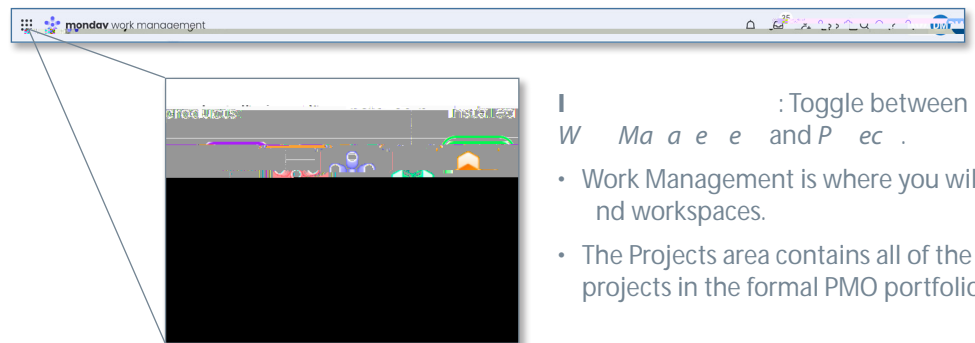
Basic navigation

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

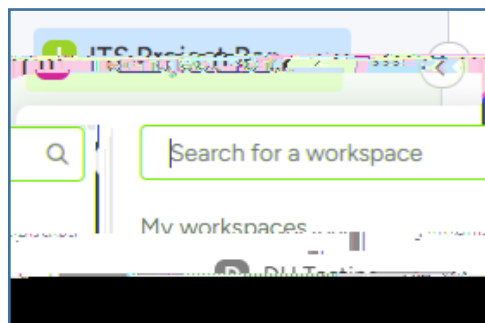


monday.com has two main areas: **W**ork Management and **P**rojects. Work management is available for teams to track and organize a wide variety of work items. The Projects area is specifically used for the ITS project portfolio.

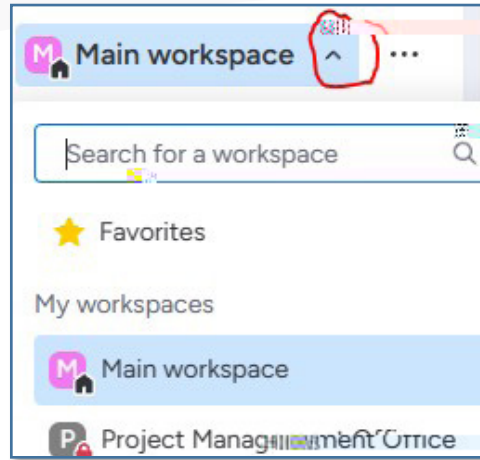


- I** : Toggle between **W**ork Management and **P**rojects.
- Work Management is where you will find workspaces.
 - The Projects area contains all of the projects in the formal PMO portfolio.

To see the formal project portfolio select **P**rojects then select the **I**TS. 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 (subscribed) to by clicking the arrow next to the current workspace's name.



Navigation

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




M displays a list of all your assigned items. As a viewer you can not interact 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.

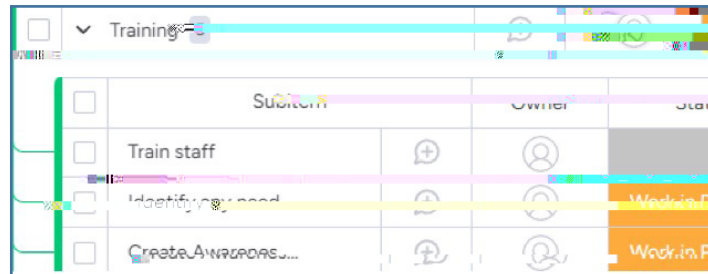
You can also navigate using the icons to the right of your top bar.





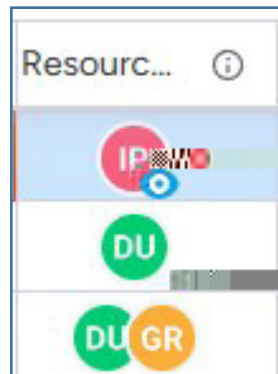
Items (3) are single lines representing tasks (think of rows in Excel). Each item has its own  where you can start or view individual task updates.

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



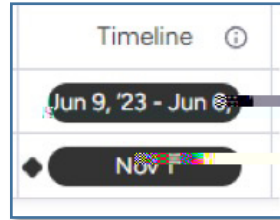
Columns (5) work kind of like columns in Excel. We use a few key column types in our project environment:

People (People) - 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.



S a

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.

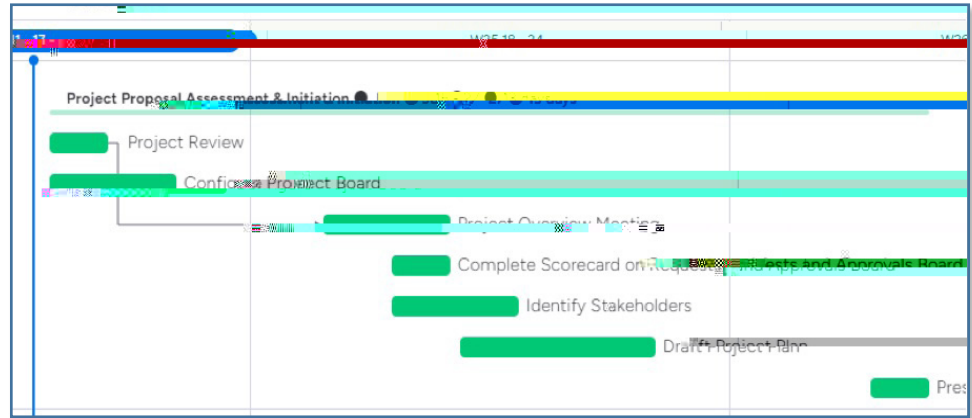


Number - a column for tracking numeric values. As a stakeholder, talk with

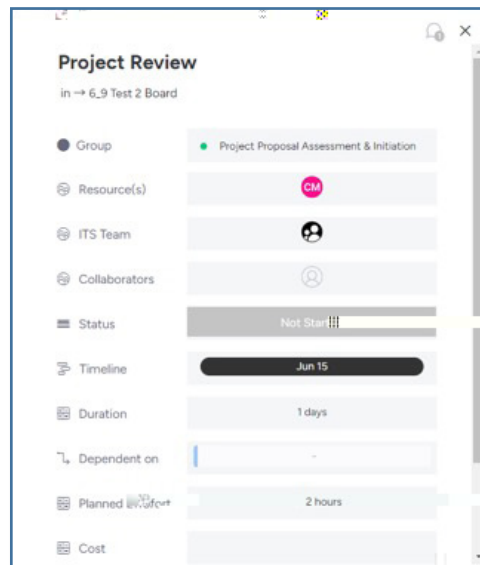
Types of views:

Monday.com Board View: This is the default view in monday.com for all boards, and it displays all columns.

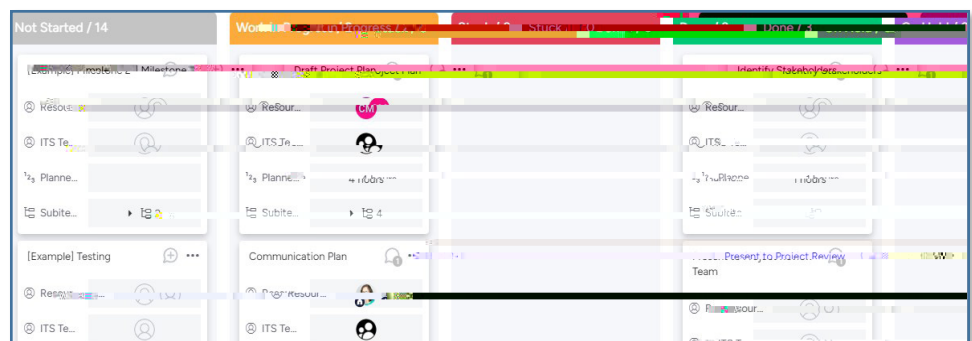
Monday.com Gantt Chart View: monday.com offers a useful and intuitive Gantt Chart view.



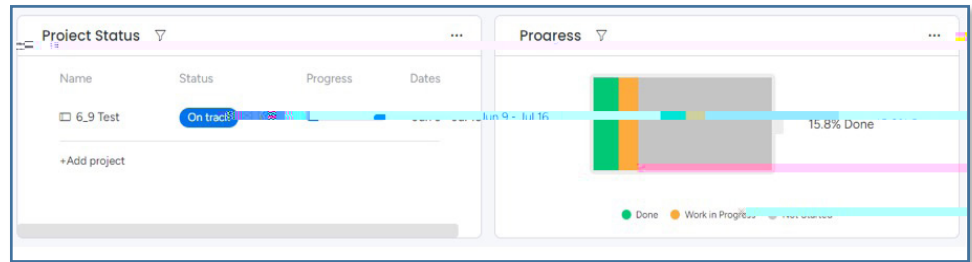
Each task appears in the Gantt view, corresponding to its timeline schedule. You can click on the bar to see an item's details.



Monday.com Board View: This is your basic card wall view and may be the preferred view for many development projects.



: 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 Summary*) displays a status based on the percentage of tasks complete vs. the percentage of time elapsed.

The Battery widget (labeled here as *Project*) 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'.

