



MONDAY.COM OPTIMIZATION





CONTENIDO

EN UN MUNDO DE TECNOLOGÍA, LAS PERSONAS MARCAN LA DIFERENCIA

03

CREATE YOUR PROJECT BOARD

09

DISPLAY YOUR DATES IN A CALENDAR

10

MANAGE YOUR RESOURCES

11

VISUALIZE YOUR DATA WITH CHARTS

12

AUTOMATE YOUR WORKFLOW

14

CONNECT YOUR BOARDS TOGETHER

16

GET A VISUAL OVERVIEW WITH A DASHBOARD



CREATE YOUR PROJECT BOARD

The first board we're going to check out is called "Project Board" and is a great example of a **high-level board!** A high-level board allows you to see a quick overview of one or more projects so that you always know where things stand. This kind of board is a great tool for managers and team leaders who need to see how the project is progressing but don't necessarily need to see every detail.

They can also be used by an entire team as a hub for collaboration and updates!

Project Board

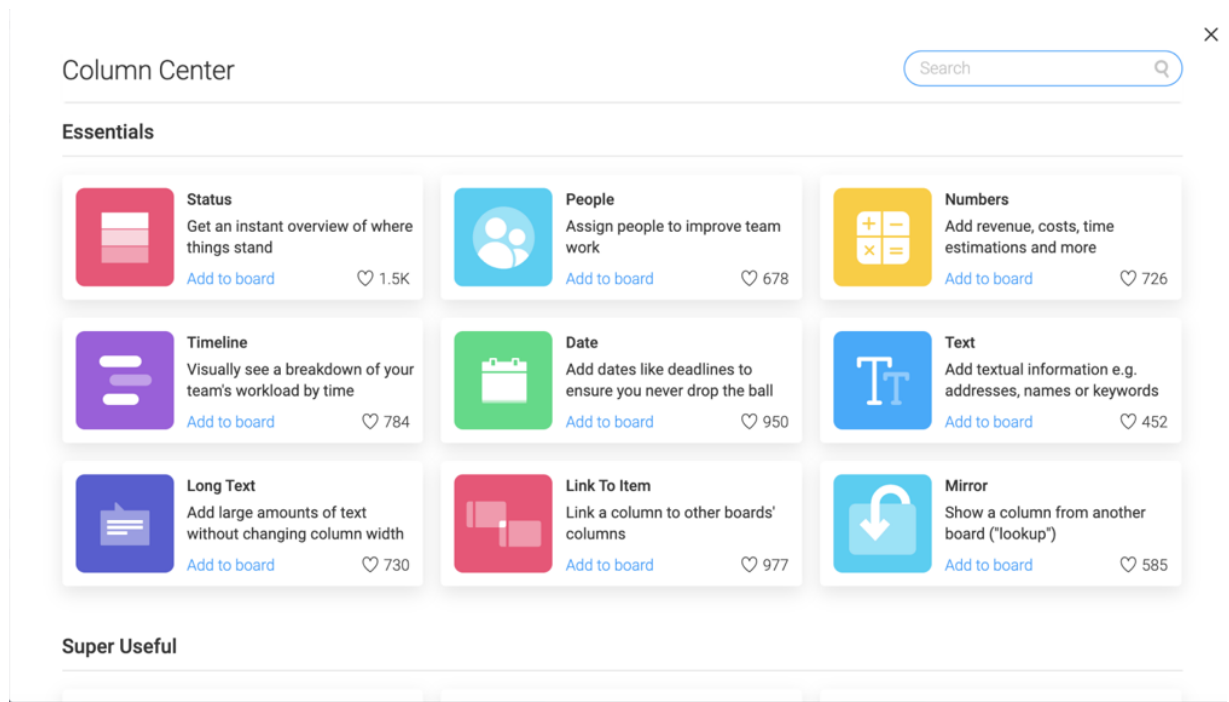
	Owner	Status	Priority	Timeline	Cost	Text	
Start Here							
Hi there! 🙋 Read this ➡					\$0 sum		
Planning							
Activity 1		Done	High	✓ May 6 - 12	\$17,000		
Activity 2		Done	High	✓ Jun 1 - 28	\$5,000		
Activity 3		Stuck	Medium	! Jun 6 - 17	\$25,000		
Activity 4		Stuck	Low	! Jun 3 - 27	\$12,500		
					\$59,500 sum		
Execution							
Activity 5		Stuck	High	! Jun 15 - 21	\$23,000		
Activity 6		Stuck	High	! Jun 22 - 28	\$18,000		
					\$41,000 sum		
Launch							
Activity 7		Stuck	High	! Jul 10 - 13	\$9,000		
					\$9,000 sum		
Monitoring							
Activity 8		Stuck	Medium	! Jul 31 - Aug 5			



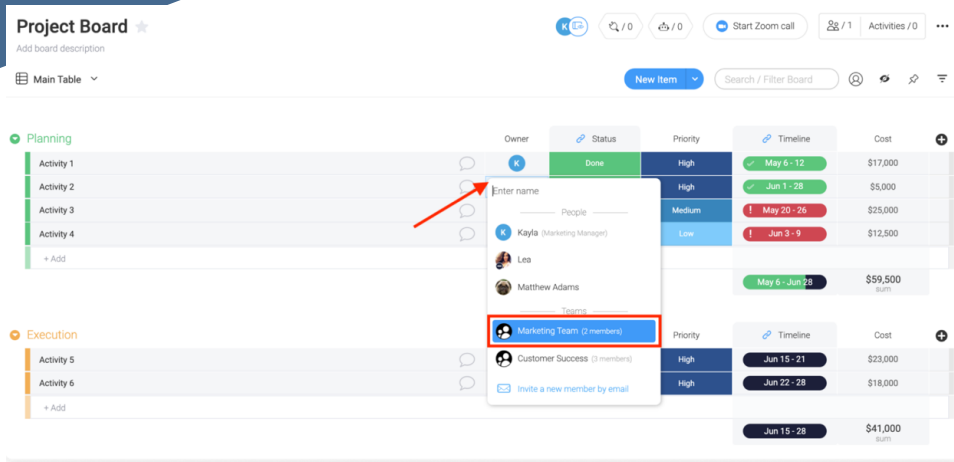
CREATE YOUR PROJECT BOARD

Group is a color-coded section on your board that contains your items (rows). Our groups are a really central part of our board because they help us categorize our board's content. There are unlimited ways to group our items!

Columns are the building blocks of our board, and they are super diverse! Each column can be used in a variety of different ways! Browse through the Column Center to preview all of the options, and start to get inspired to see which ones can work for you best!

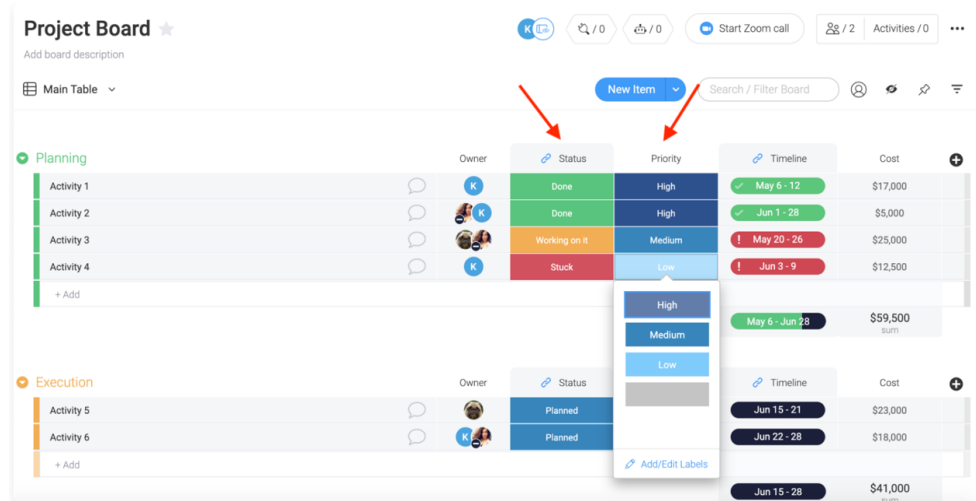


CREATE YOUR PROJECT BOARD



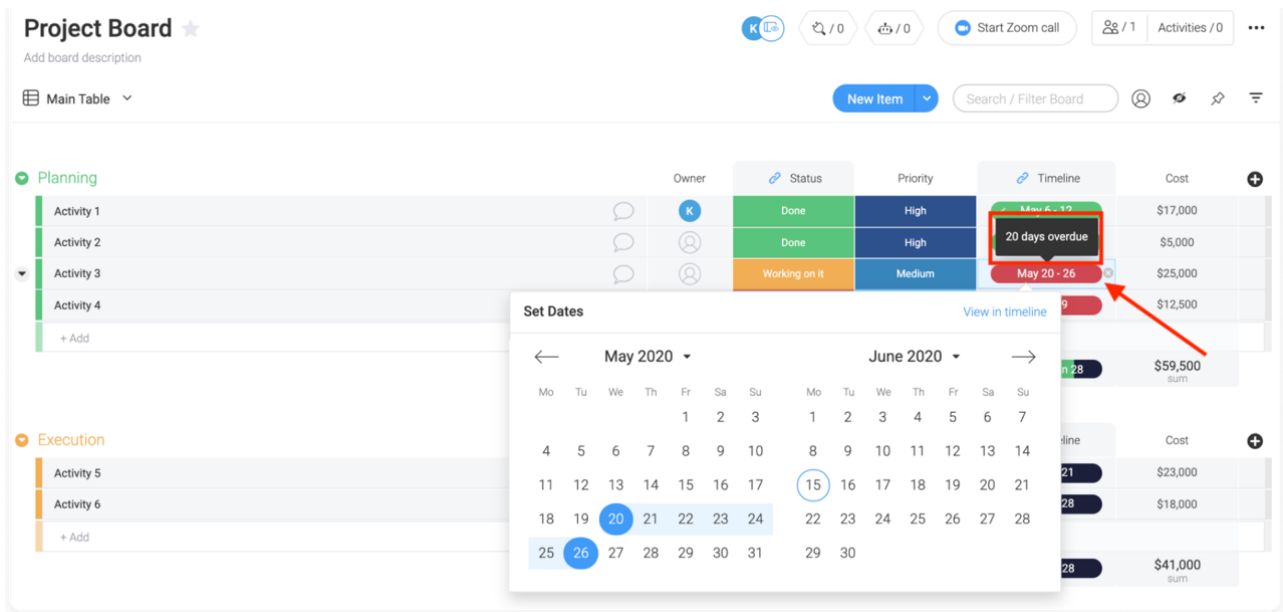
The People Column allows you to assign one or more of your team members to an item! Assign who's responsible to complete a task, review a document, or schedule next week's meeting! You can even assign an entire team to a project.

Status Column to track the progress of an item, assign its priority, or create any set of custom labels to categorize the items on your board! Get creative with this versatile column and the sky is the limit! Here, we're using two different Status Columns; one to display the item's update status, and one to reflect the priority of the item.



CREATE YOUR PROJECT BOARD

Timeline Column gives you a visual representation of how long you or your team has to complete an item or project! Use the column to display a timeline for any item, or the total for a group of items! In our "Project Board", the Timeline Column is synced with the Status Column in **Deadline Mode** to track whether the project has been marked as "Done" by the time the project's allotted time is up!



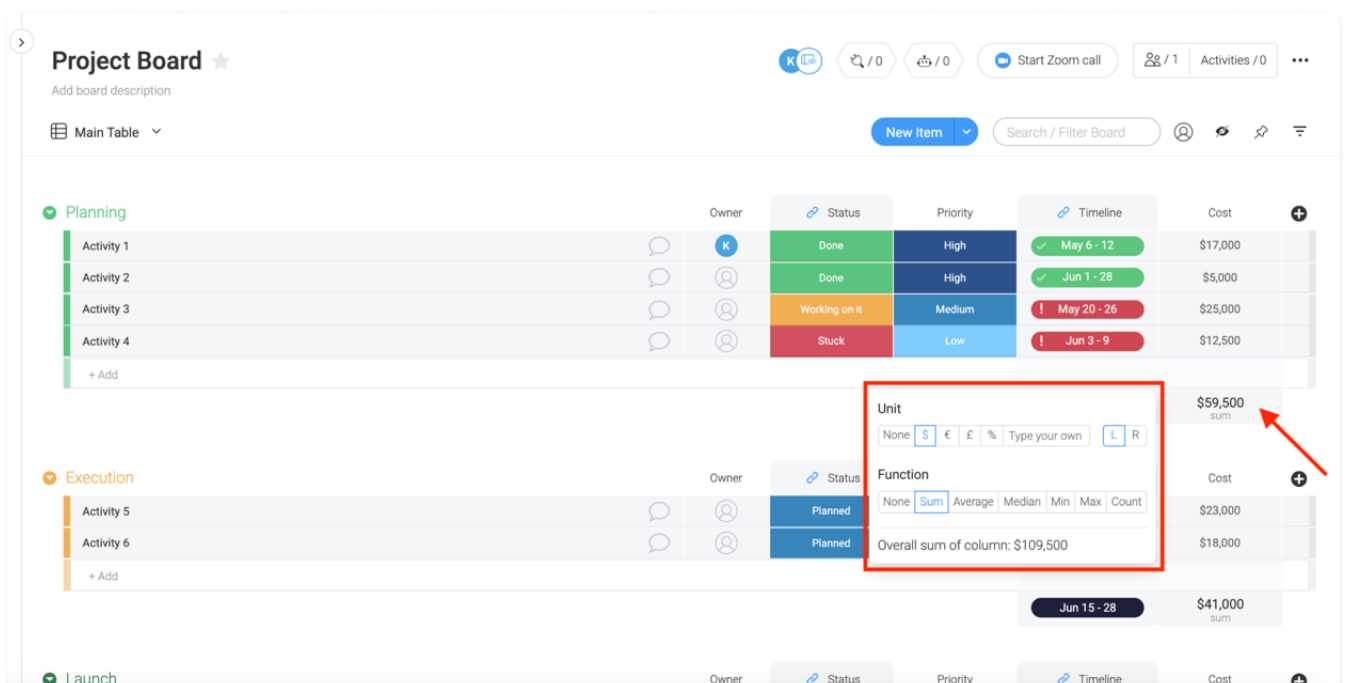
The screenshot shows the Monday.com Project Board interface. The board is titled "Project Board" and has a "Main Table" view. The table has columns for Owner, Status, Priority, Timeline, and Cost. The Timeline column is highlighted, showing a red box with the text "20 days overdue" and a date range of "May 20 - 26". A date picker is open, showing the months of May and June 2020. The date picker has a "Set Dates" button and a "View in timeline" link. The date picker shows the date 20 as selected, and the date 26 as the end date. The date picker also shows the date 15 as selected in the June 2020 calendar.

Activity	Owner	Status	Priority	Timeline	Cost
Activity 1	K	Done	High	May 6 - 12	\$17,000
Activity 2		Done	High		\$5,000
Activity 3		Working on it	Medium	May 20 - 26	\$25,000
Activity 4					\$12,500
					\$59,500 sum
Activity 5					\$23,000
Activity 6					\$18,000
					\$41,000 sum

CREATE YOUR PROJECT BOARD

If you are trying to track simple expenses or even calculate the total number of hours spent on a project, you can use the **Numbers Column!** The Numbers Column will calculate the sum, average, median, minimum, maximum, or a count of all the numbers in your group.

Make sure to check out some more of our awesome columns, like the **Formula Column**, the **File Column**, or the **Location Column!**



The screenshot shows a Monday.com Project Board titled "Project Board". It features a table with columns: Owner, Status, Priority, Timeline, and Cost. The table is divided into two sections: "Planning" and "Execution".

Section	Activity	Owner	Status	Priority	Timeline	Cost
Planning	Activity 1	K	Done	High	May 6 - 12	\$17,000
	Activity 2		Done	High	Jun 1 - 28	\$5,000
	Activity 3		Working on it	Medium	May 20 - 26	\$25,000
	Activity 4		Stuck	Low	Jun 3 - 9	\$12,500
Execution	Activity 5		Planned			\$23,000
	Activity 6		Planned			\$18,000
	Jun 15 - 28					\$41,000

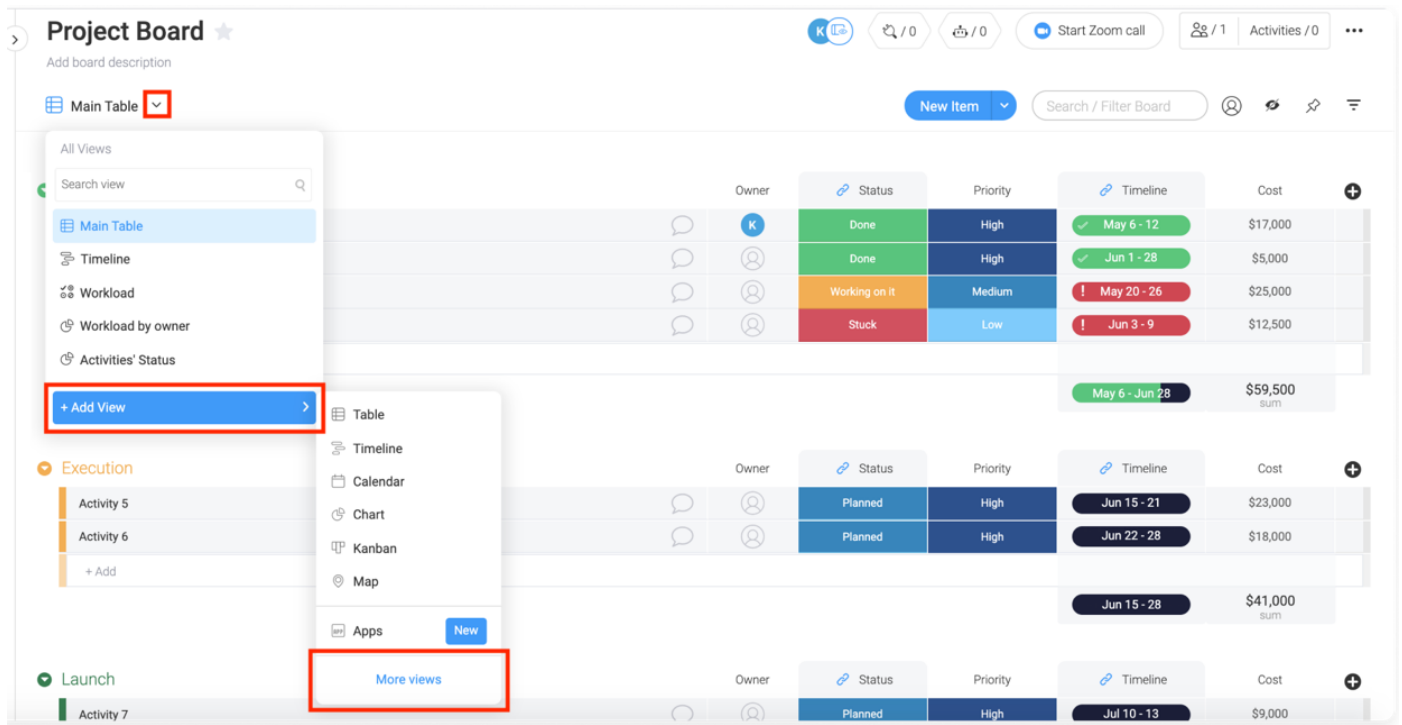
A red box highlights the "Numbers Column" dropdown menu, which is open. It shows the following options:

- Unit: None, \$, €, £, %, Type your own, L, R
- Function: None, Sum, Average, Median, Min, Max, Count
- Overall sum of column: \$109,500

An arrow points to the "Sum" function option.

CREATE YOUR PROJECT BOARD

Get insights with board views Now that we have all of the components of our board set up, we can choose how we'd like to display this information! The "Main Board View", which is what we've already set up here, is just one way to see all of our items and data! We can focus in on dates and deadlines or see numbers and progress in more comprehensive, visual format with **board views!**



The screenshot shows the Monday.com Project Board interface. The top navigation bar includes the board name "Project Board", a search bar, and various utility buttons. The main content area displays a table view of project items. A dropdown menu is open, showing the "Main Table" view selected. Below this, a "More views" button is highlighted, indicating the next step in creating a new board view.

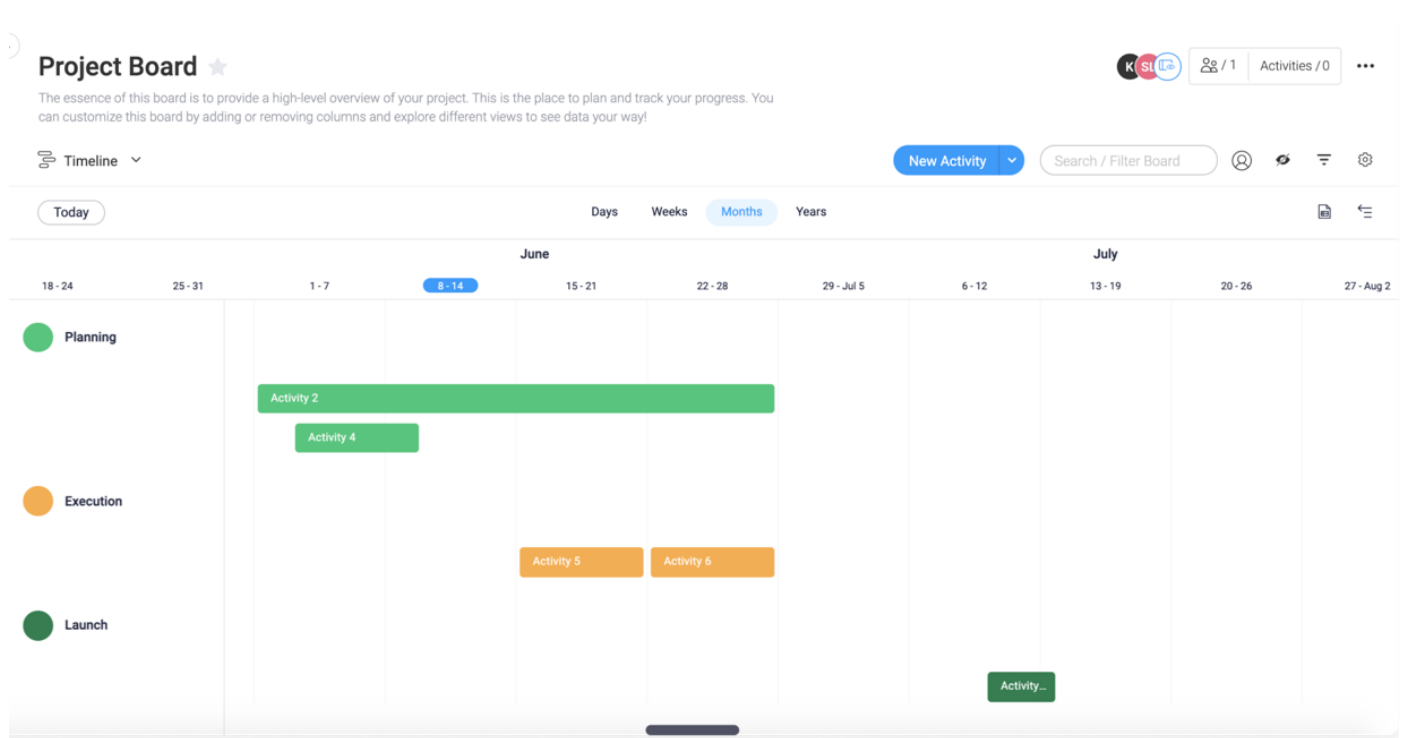
Owner	Status	Priority	Timeline	Cost
K	Done	High	May 6 - 12	\$17,000
	Done	High	Jun 1 - 28	\$5,000
	Working on it	Medium	May 20 - 26	\$25,000
	Stuck	Low	Jun 3 - 9	\$12,500
			May 6 - Jun 28	\$59,500 sum

Owner	Status	Priority	Timeline	Cost
	Planned	High	Jun 15 - 21	\$23,000
	Planned	High	Jun 22 - 28	\$18,000
			Jun 15 - 28	\$41,000 sum

Owner	Status	Priority	Timeline	Cost
	Planned	High	Jul 10 - 13	\$9,000

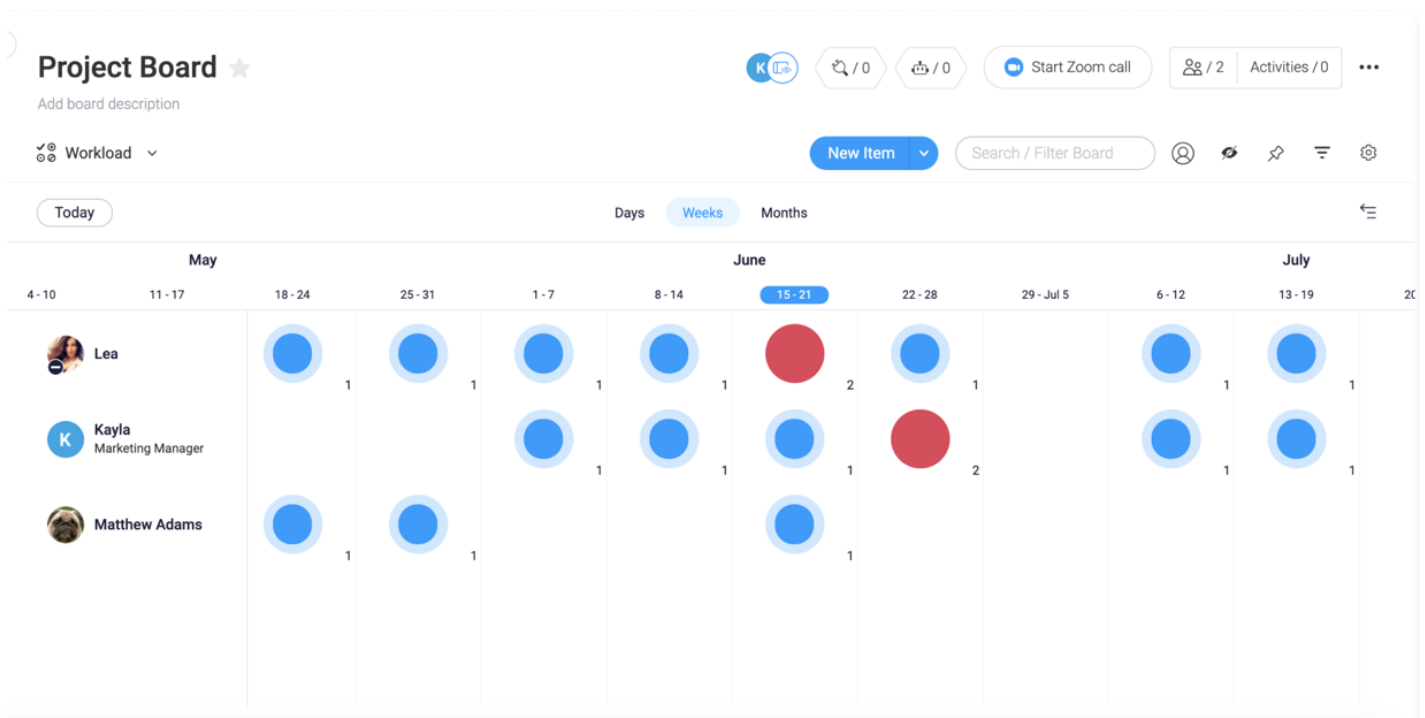
DISPLAY YOUR DATES IN A CALENDAR

The **Timeline View** works together with the Timeline Column by collecting its data and displaying it all together in a calendar. All of your items are shown in their place on the calendar and are color-coordinated with the group it belongs to, which is displayed in the left panel. This view is a great way to visualize the length of your projects and how several projects can overlap in your calendar.



MANAGE YOUR RESOURCES

The **Workload View** helps you visualize and understand work allocation across your whole team! You can see in one glance who is over capacity and assign upcoming tasks accordingly. If needed, you can always reassign or change due dates to make sure everyone stays on target with the amount of tasks they can complete within that timeframe.



VISUALIZE YOUR DATA WITH CHARTS

The **Chart View** allows you to create a chart with any of the data from your board! Here, we have two different chart views to show different examples. The first chart, called "Activities' Status", displays the progress of our project. The x-axis represents the different status label from our status column while the y-axis counts the number of items associated to each status.

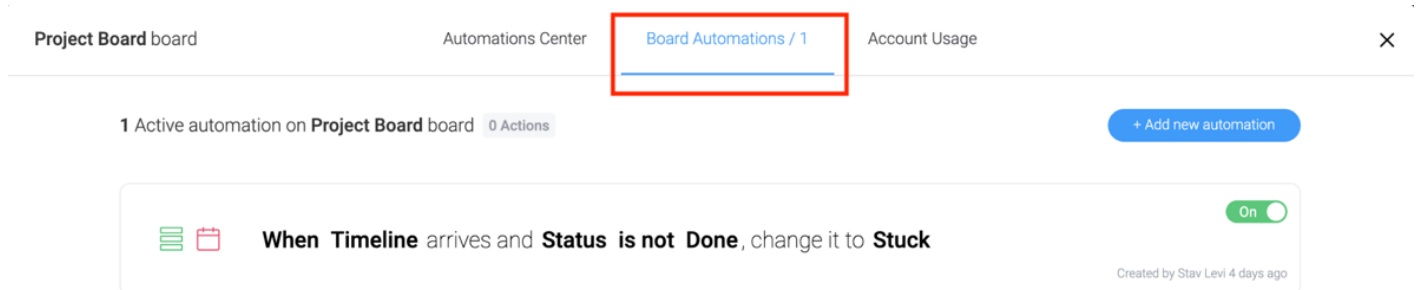


Take a look at some of the other views available in the Views Center! We recommend the **Calendar View**, the **Files View**, and the **Forms View** to start!



AUTOMATE YOUR WORKFLOW

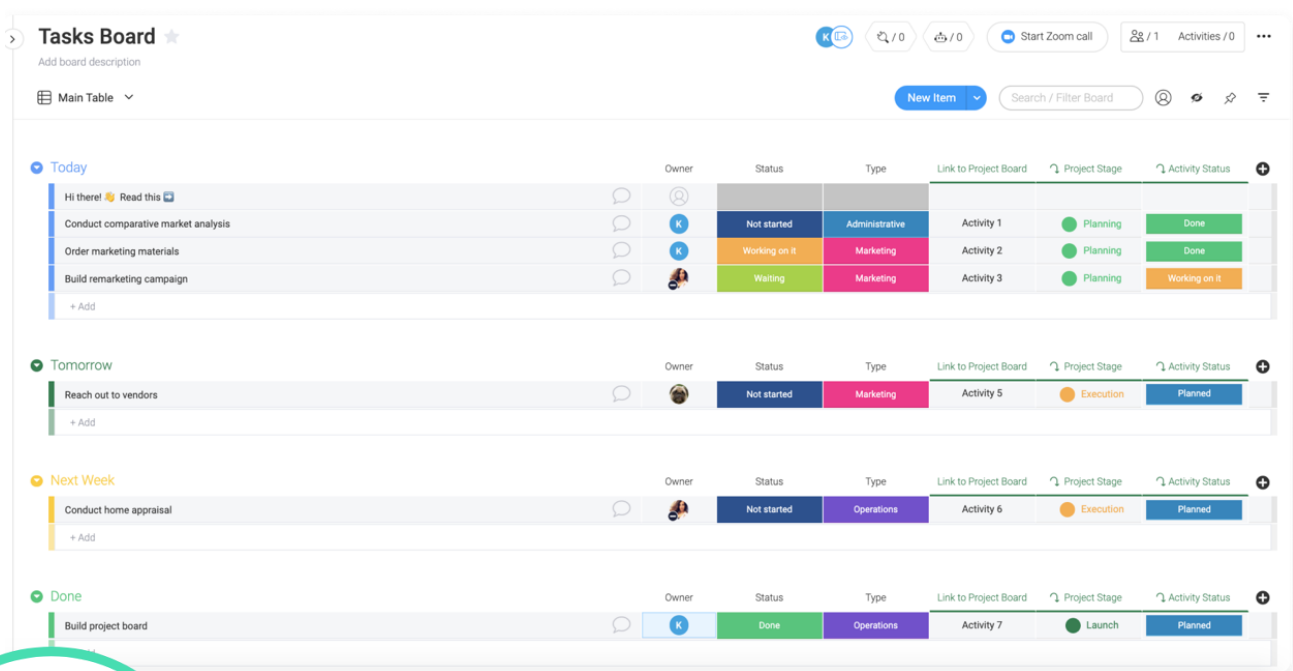
Automations are a great way to set actions to be triggered by certain events in your workflow! They save time, effort, and remember to carry out certain actions when you might have forgotten! There are lots of customizable recipes in our Automations Center and you can even make your own! You can access the Automations Center by clicking the robot icon at the top right-hand corner of your board right here. You can see a list of all of the automations on our "Project Board" in the pop-up window:



AUTOMATE YOUR WORKFLOW

While our high-level "Project Board" gives a really great overview of the entire project, our team needs another board to manage all of the details between the larger milestones of the project.

A low-level board is a great tool to manage all of the important aspects and details of your tasks! Unlike a high-level board, which is intended to give more of a project overview, low-level boards track a project closely. They can be used to manage time, shifts, resources, and can even be used as a to-do list for daily or weekly tasks. In this case, we've supplemented our high-level "Project Board" with a lower-level weekly "Task Board". This allows managers to see the overall status updates needed, while the team handles the day-to-day tasks at a more granular level.



The screenshot shows a Monday.com "Tasks Board" with a table of tasks organized by date. The table has columns for Owner, Status, Type, Link to Project Board, Project Stage, and Activity Status. Tasks are grouped under "Today", "Tomorrow", "Next Week", and "Done".

	Owner	Status	Type	Link to Project Board	Project Stage	Activity Status
Today						
Hi there! 📧 Read this 📧						
Conduct comparative market analysis	K	Not started	Administrative	Activity 1	Planning	Done
Order marketing materials	K	Working on it	Marketing	Activity 2	Planning	Done
Build remarketing campaign		Waiting	Marketing	Activity 3	Planning	Working on it
Tomorrow						
Reach out to vendors		Not started	Marketing	Activity 5	Execution	Planned
Next Week						
Conduct home appraisal		Not started	Operations	Activity 6	Execution	Planned
Done						
Build project board	K	Done	Operations	Activity 7	Launch	Planned

CONNECT YOUR BOARDS TOGETHER

Our "Project Board" is made up of different activities, which are broken down into smaller tasks in our "Tasks Board". Since these two boards are dependent on each other, it is important to have a connection between our high-level and low-level boards.

To achieve this, we've used the Connect boards Column on our "Tasks Board"! We use the **Connect boards Column** to link each of the small tasks on our "Tasks Board" to the larger activity from the "Project Board" that it belongs to! This really helps us stay focused and understand the bigger picture, and how everything is interconnected.

Tasks Board ★

Add board description

Main Table ▾

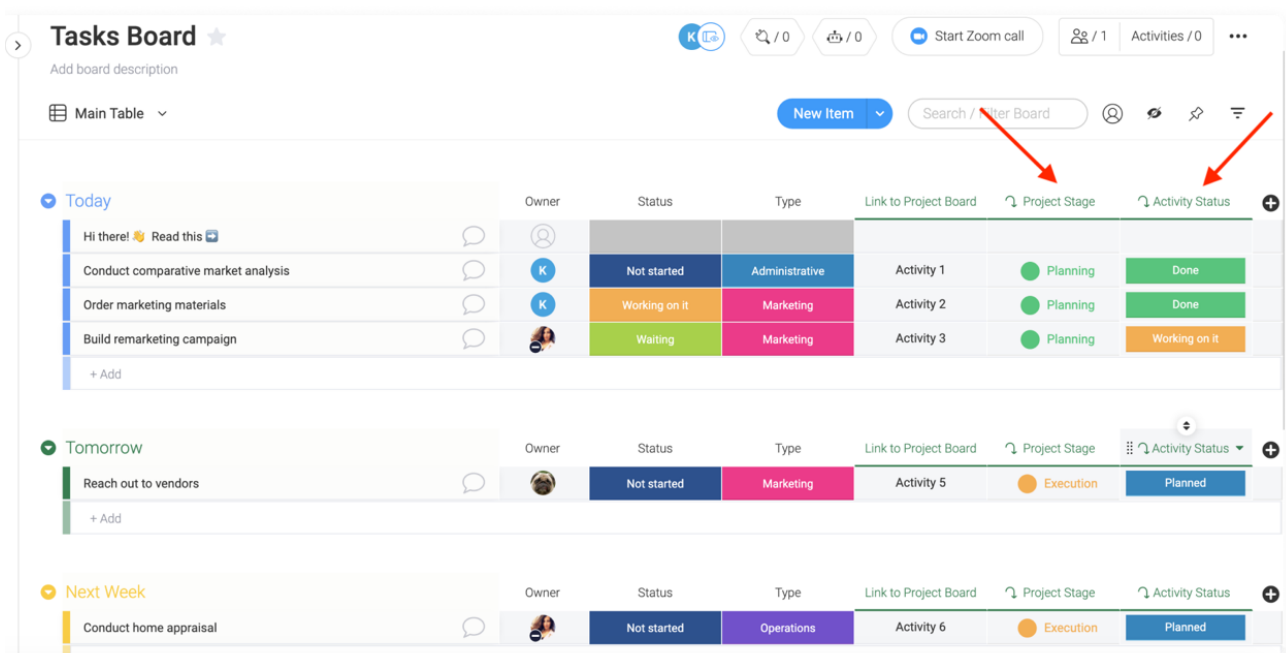
New Item ▾

Search / Filter Board

	Owner	Status	Type	Link to Project Board	Project Stage
Today					
Hi there! 📧 Read this					
Conduct comparative market analysis	K	Not started	Administrative	Activity 1	Planning
Order marketing materials	K	Working on it	Marketing	Activity 2	Planning
Build remarketing campaign		Waiting	Marketing	Activity 3	Planning
+ Add					
Tomorrow					
Reach out to vendors		Not started	Marketing	Activity 5	Execution
+ Add					
Next Week					
Conduct home appraisal		Not started	Operations	Activity 6	Execution

CONNECT YOUR BOARDS TOGETHER

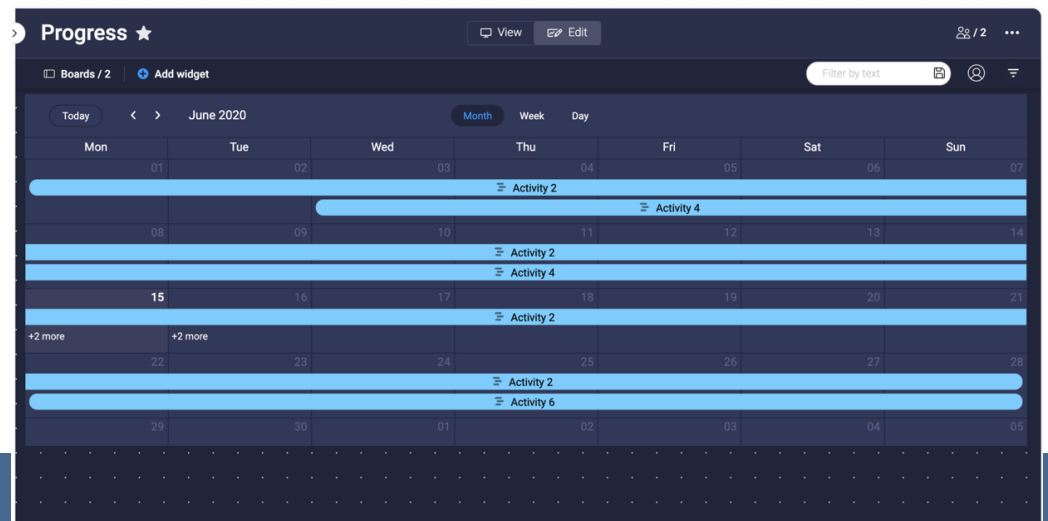
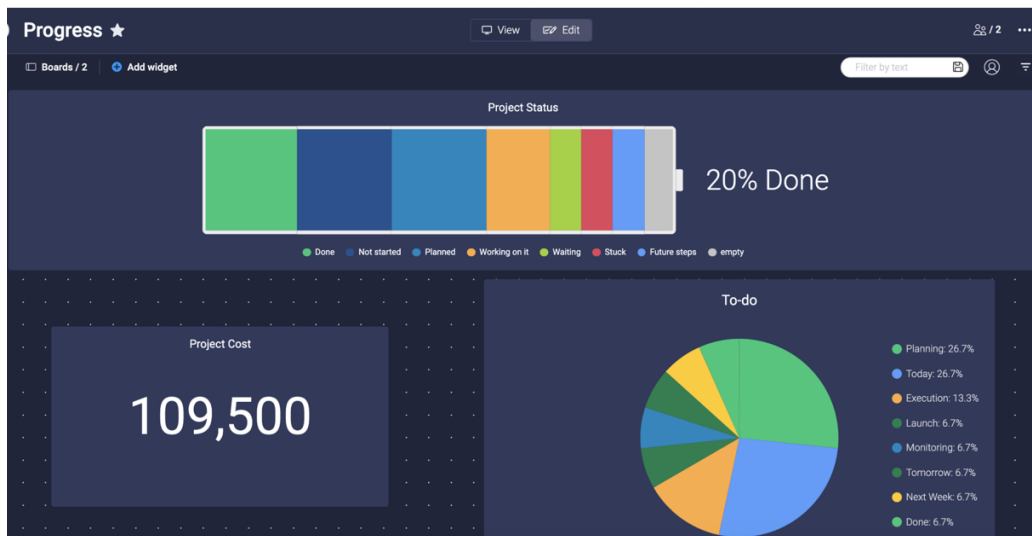
To take our linked boards even further, we've added two **Mirror Columns** to our "Tasks Board". With the Mirror Column, we can display specific information from our "Project Board" right inside our "Task Board"! This way, we can work directly in our "Tasks Board", while still being able to reference important details from our other board! We can see everything we need in one frame, rather than flipping back and forth between two boards. If we need to, we can even make changes to our mirrored columns right in our Tasks Board!



	Owner	Status	Type	Link to Project Board	Project Stage	Activity Status
Today						
Hi there! 📧 Read this 📧						
Conduct comparative market analysis	K	Not started	Administrative	Activity 1	Planning	Done
Order marketing materials	K	Working on it	Marketing	Activity 2	Planning	Done
Build remarketing campaign		Waiting	Marketing	Activity 3	Planning	Working on it
Tomorrow						
Reach out to vendors		Not started	Marketing	Activity 5	Execution	Planned
Next Week						
Conduct home appraisal		Not started	Operations	Activity 6	Execution	Planned

GET A VISUAL OVERVIEW WITH A DASHBOARD

You can create a **dashboard** connected to your two project management boards (and any other relevant boards) to get a great visual overview of our projects loaded with apps and widgets! Let's check out a few widgets that might help us with our "Project Board" and "Tasks Board":



GET A VISUAL OVERVIEW WITH A DASHBOARD

- The **Battery Widget** shows us the distribution of the labels in our Status Columns across our boards!
- The **Numbers Widget** shows the grand total of the project cost calculated by our Numbers Column.
- The **Chart Widget** generates a chart based on the data in our boards! This one shows us how many items are in each of our groups.
- The **Calendar Widget** shows all of the tasks and activities across our boards in one concise calendar.

