


Monday - Getting Started For Engineers

Monday is a task management system that can be configured for anything. It can be used for to-do lists and project planning or that needs to hold a To-Do list of tasks. It allows a history of actions for tasks, along with an upload area for any type of file, photo, etc. Its real strength is in team communication, as everyone has access to all the information

 Difficulty **Very easy**

 Duration **5 minute(s)**

Contents

Introduction

Why Change?

Similarities to mHELPDESK

Step 1 - Receiving notification

Step 2 - See all assigned jobs

Step 3 - Click on a job to edit it

Comments

Introduction

Why Change?

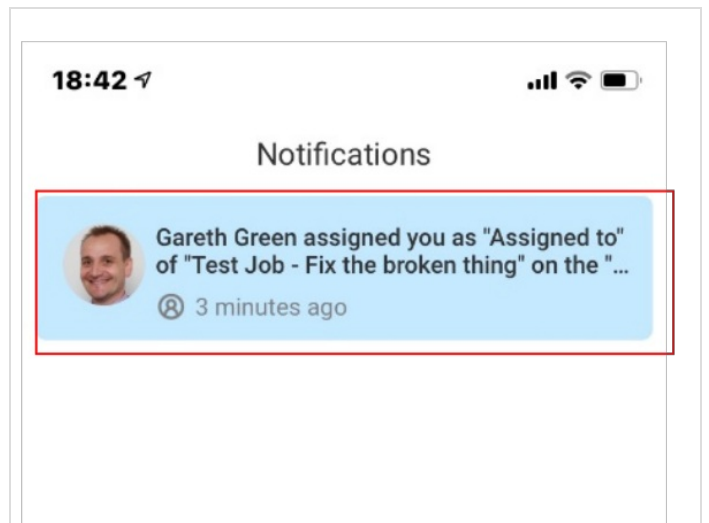
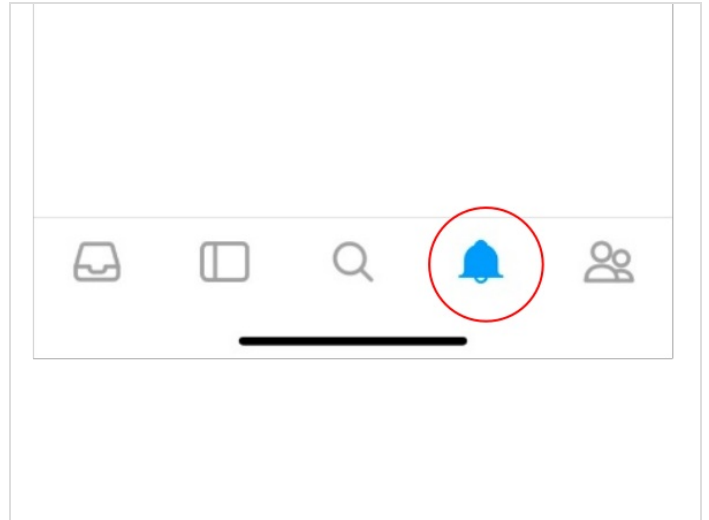
- mHelpdesk limitations
 - Cludgy to use
 - Slow response
 - Cannot connect to other apps or emails
- Monday advantages
 - Easier and more elegant to use
 - More configurable
 - easy to email into
 - Better searching
 - Expandable to whole business
 - Cheaper

Similarities to mHELPDESK

- Monday consists of a set of user definable “Boards” that contain a list of “Pulses”.
- The “pulses” can be configured however we like.
- I have created a “Board” called “Service Jobs”
- On the Service Jobs Board, I have designed the “Pulses” to mimic the service jobs, so this will include the machine, the status, the type classification, etc
- Any pulse has associated “Updates”. These are just like the “items” on an mHelpDesk job, but is much more flexible than the plain text of mHelpdesk
- The service team will assign jobs as before
- The job should be updated by yourself during your visit
- The database of jobs is searchable so you can find the machine history

Step 1 - Receiving notification

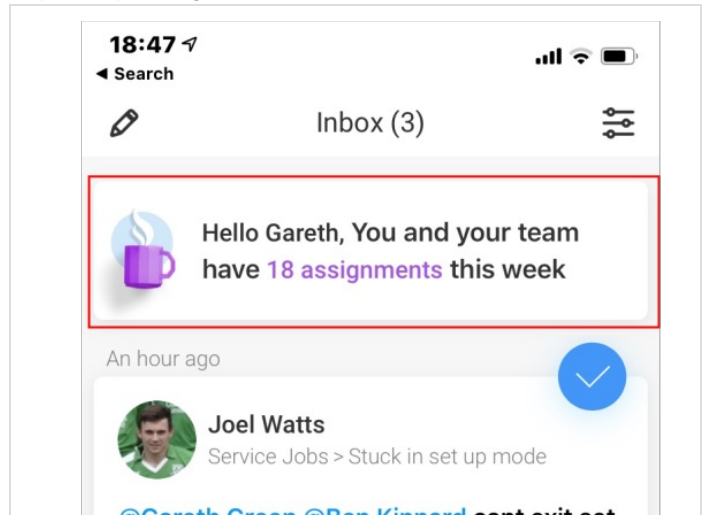
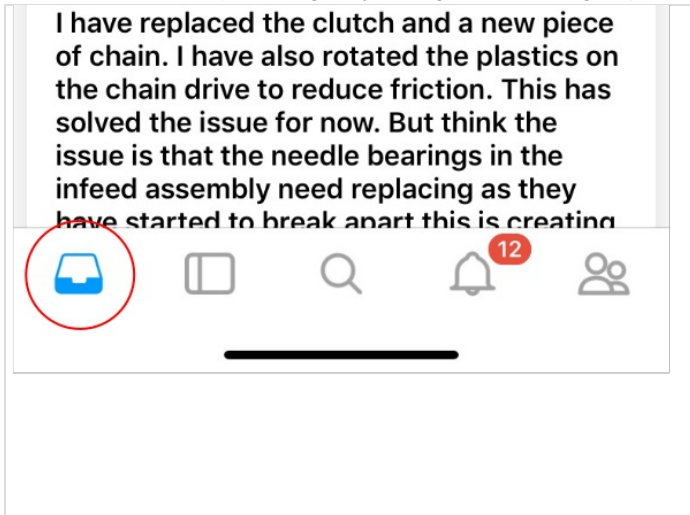
Notifications come from emails, and can also be seen in the 'notifications' area of the app

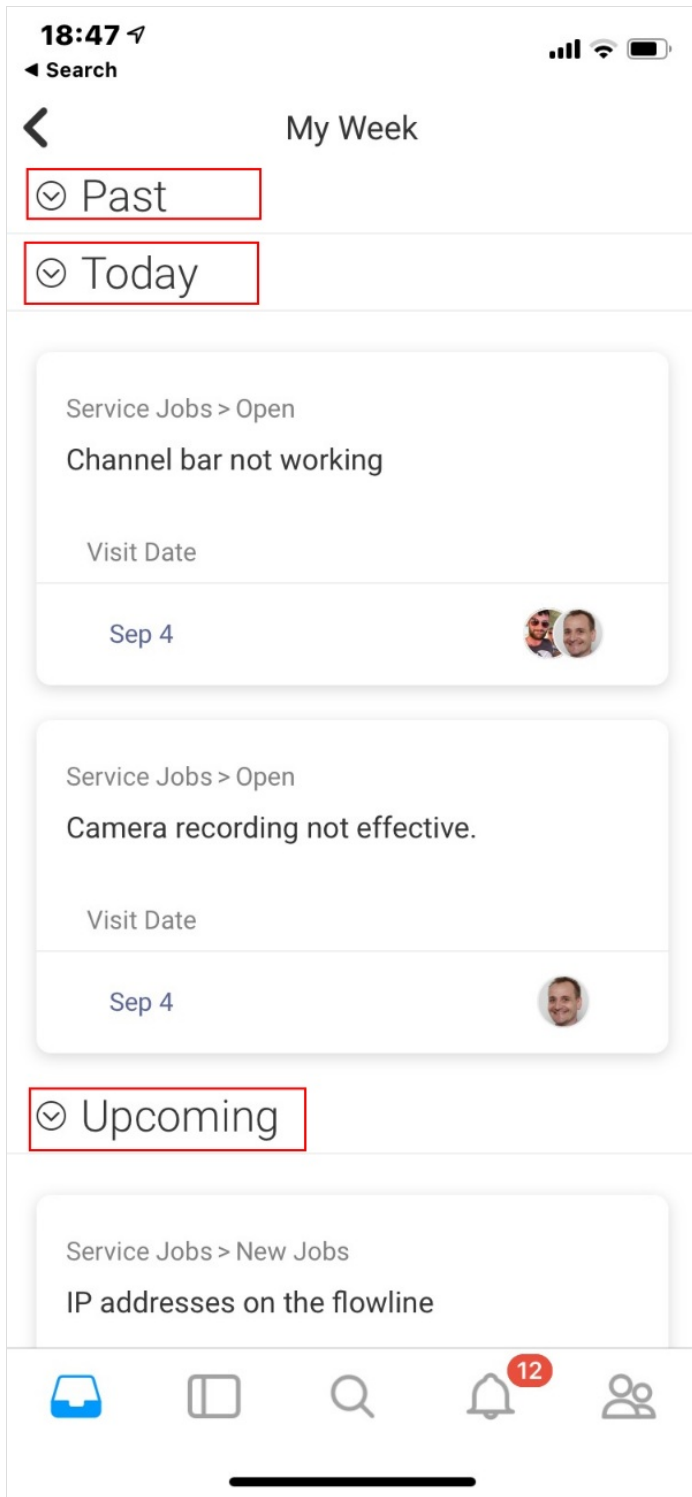


Step 2 - See all assigned jobs

Jobs assigned to you can be seen via the inbox

1. Click on the inbox
2. Select "You and Your team assignments"
3. You can now see your assigned jobs organised into 3 groups - Past, Today and Upcoming





Step 3 - Click on a job to edit it

There are 3 tabs for each job

Columns - these are the fields that we use to define each job

Updates - this is where you can see the job history and add your own updates and photos

Info Boxes - Here you can upload files

