Monday.Com UNC Campus Communicator User Guide 2023

The official Marketing Communications project request form is located here:

https://forms.monday.com/forms/7c2164c492dfb901b45f34652086caa8?r=use1

Overview

Monday.com is a project management tool that will be replacing Basecamp for University Advancement, effective April 25, 2023.

Creating an Account:

You will receive an email from Monday.com. Use your unco email to create an account

Marketing Projects: To submit a Marketing Request :

- Visit the Marketing Project Request form.
- Fill out all of the required fields.
    - If your project request involves multiple categories, select the one most relevant, or, select "Other."
- Submit the request form:
    - If you can't submit your form, check to be sure you have filled in the required fields.
    - If you successfully submitted your form submission, you will see a new web page confirming that you successful submitted your form.

Email Requests: How to submit a Marketing Request to send an Email :

- Complete the online Marketing Request form.
- Submit your request at least 24 hours in advance of your send date/time, if possible.
- Be sure to complete all the required fields.
- In the section "What do you need support with?," select the last option: "Approval to send an email at a certain date(s)/time(s)."
- The Marketing Team will respond to your request within one business day.
- For urgent/emergency requests, reach out directly to Sonja.Rizzolo@unco.edu and we will try to accommodate your email needs.

How to Use Monday.com as Your Workspace

Creating a workspace (folder):

Think of a workspaces as large, organizational folders used to categorize content in an account. You can use them to organize information according to different teams, projects, or other categories you or your team works with. For example, the Marketing team created workspaces for Marketing and for University Advancement. Within Workspaces, you can also create Boards.

Creating a Board (project):

A board is where you manage all of your workflows/projects. Think of it as similar to an Excel document with rows and columns.

You can also think of a Board as a virtual whiteboard where projects are stored so you can keep track of everything from everyday tasks to month- or year-long projects. You can use a board to manage anything from a project to a roadmap, pipeline, budget, etc. Currently, we have built boards for Marketing and Communications as well as the Creative Team, News and PR team and the Web Team.

You can set up a board for your own team and/or for yourself to manage your projects. Within Boards, you can also create Groups.

Creating a Group (tasks or steps within a project):

A Group is a color-coded section on your board that contains your items (rows). You can have multiple Groups on a Board, which allows you to organize and categorize your items in a manner that best suits your needs. A group can be any length of time—a week, a month, a phase of a project, or whatever you want. Within each Group, you can have rows of Items.

Creating an Item (individual tasks or steps):

An Item is a single row within a Group on a Board. It usually consists of a single task within your project or task board, but it can be anything you want.

How to Review or Respond to an Email Prompt:

1.) If you receive an email tagging you to comment on a draft, simply click the link in the email to provide your input.

2.) Make sure you link your Monday.com account to your UNC SharePoint account.

3.) Using the link in the email you received, you can access the document to review, edit and/or make comments.

User Types:

Admin

An Admin is an account user with the ability to oversee the entire account and manages everything from users and boards to security and billing.

Members

Members are your teammates, employees or other members your Monday.com account with whom you work. Team members can see all information on Main Boards and you can invite them to collaborate easily on both Shareable and Private Boards.

Viewer

Viewers are another type of user that you can invite to your Monday.com account. They are exactly like team members and have access to any Main, Shareable and Private Boards that you decide to share with them. The key difference is that they are only able to *view* boards and cannot edit any documents.

Need more help? Check out these additional resources:

1.) M[onday.com Videos](#)

2.) Li[ve Monday.com Webinars](#)