



How to use Monday.com Task Board

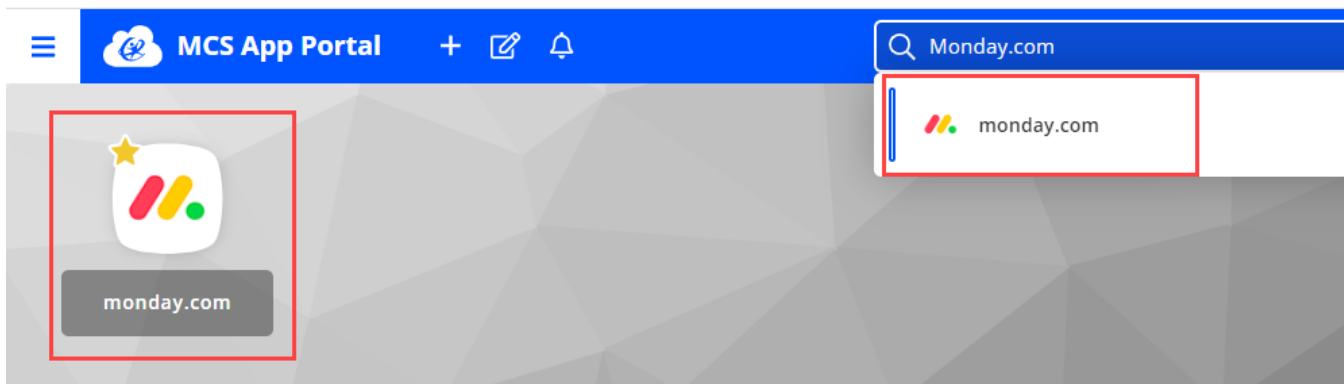
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Login to Monday.com

Depending on the user's account, either a team member login or a 'Guest' login, sign into Monday.com using the credentials used to create the Monday.com account.

A app can be found within the MCS App Portal:



If using a 'Guest' login, navigate to modestcityschools.monday.com and take note of the email address that the account was created with. If a 'Guest' login is used, the login email will end in "mcs4kids.com". The password is set up when accepting the invite to create an account.

Your Account's URL:
modestcityschools.monday.com

Your Login Email:
[redacted]@mcs4kids.com

Log In

Modesto City Schools

Email

Password

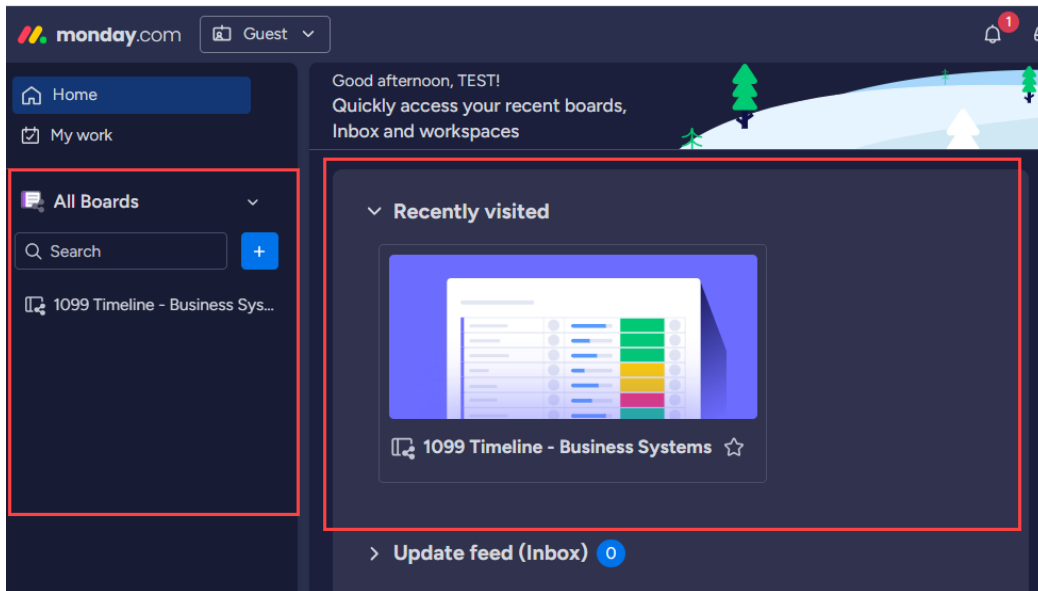
[Forgot your password?](#)

Log in →

Navigating Through Monday.com

Upon logging in, the default landing screen is called the “Home” page.

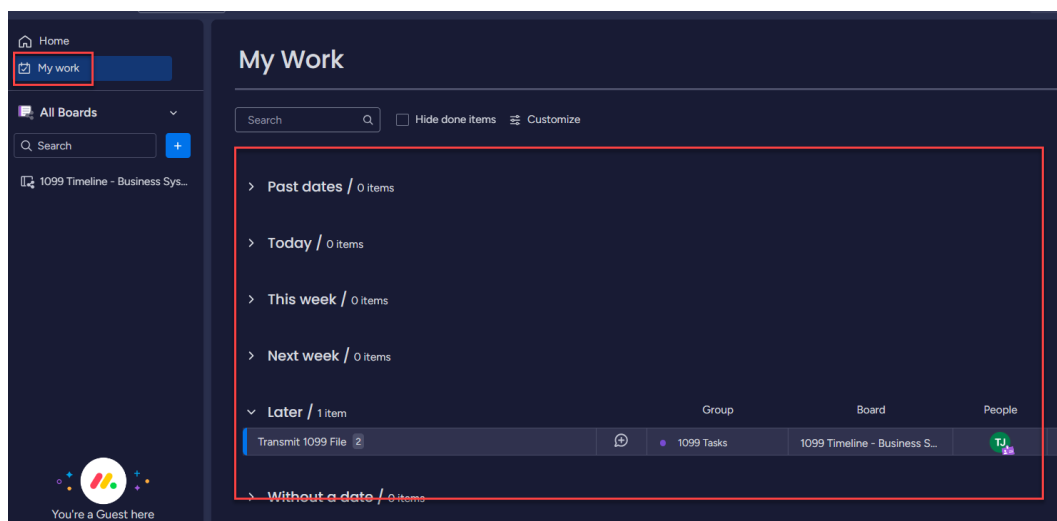
From this screen, all task boards that the user is invited to will appear on the left hand side of the screen. A list of recently visited boards will appear in the center of the screen.



To view more details on a specific task board, click on either the name of the board on the left side of the screen or clicking the recently visited tile in the center of the screen.

Based on the logged in users invitations, there may be more or less boards available to choose from.

Clicking on “My Work” on the left hand bar will display all tasks that are assigned to the logged in user. This can be useful if the user is part of different boards, this view will allow all tasks to be seen on one page.



Task Board

Each board the logged in user has access to will have different usages, column, automations and more. No two boards are the same. Below are some basic navigation instructions:

The screenshot shows a Monday.com Task Board titled "1099 Tasks". It features a list of tasks with columns for Task, Assigned To, Status, Last Updated, Responsibility, and Due Date. A sub-task section is also visible. Callouts A-E highlight specific features: A points to the task name, B to the chat bubble icon, C to the assigned person, D to the status, and E to the sub-task dropdown arrow.

Task	Assigned To	Status	Last Updated	Responsibility	Due Date
Ordered blank pressure seal forms for 1099s 1	M	Completed	JV 4 hours ago	IETS	Oct 31, 2023
Subitem					
Once Delivered, Verify blank pressure seal tax forms are correct	M	Completed	JV 4 hours ago		
+ Add subitem					
Receive 1099 Release from QSS	JV M	Completed	JV 3 hours ago	IETS	Dec 18, 2023
Install 1099 Release	M	Completed	JV 3 hours ago	IETS	Dec 18, 2023
Add security settings in QCC	JV	Completed	JV 3 hours ago	IETS	Dec 19, 2023
Review 1099 Release Notes	M JV	Completed	JV 3 hours ago	IETS	Dec 19, 2023

- A. Task Name— here is what a task is called or the action that needs to be taken
- B. Notes—Clicking the chat bubble icon will allow for notes, images, attachments to be added to a specific tasks.
- C. “Assigned To” — This is where a person can be assigned/can assign themselves a task to be responsible for. There can be multiple staff assigned to one task. Important to have as automated notifications will be sent to those assigned to the task.
- D. Status — typically a status column showing what step a task in the process is at can be selected.
- E. Sub-task — if a task has multiple parts, clicking the drop down arrow next to a task name will allow for sub-tasks to be created. Each sub-task can have their own updates.