



## Getting Started with Monday.com

### Workspaces & Boards

**Workspace:** Highest level container for boards and dashboards.

*Create:* Click '+' next to 'Workspaces' in the left sidebar.

**Board:** Where your work lives (tasks, projects, clients, etc.). Contains groups and items.

*Types:* Main (visible to all team members), Shareable (share with external guests), Private (visible only to board members).

**Creating a Board:** Click 'Add' -> 'New Board' -> Choose template or 'New Blank Board'.

**Board Permissions:** Control who can view/edit the board (Owner, Editor, Viewer).

**Pinning Boards:** Click the pin icon on a board to keep it easily accessible in the sidebar.

**Following Boards:** Click the star icon to receive notifications about board activity.

**Archiving Boards:** Remove a board from active view without deleting data. Go to Board Settings -> Archive Board.

**Deleting Boards:** Permanently remove a board and its data. Go to Board Settings -> Delete Board.

### Items & Subitems

**Item:** A single row on a board representing a task, project, lead, etc.

**Adding Items:** Click '+ Add Item' within a group or at the bottom of the board.

**Subitem:** A child item nested under a parent item, useful for breaking down tasks.

*Adding Subitems:* Hover over an item, click '+' -> 'Add Subitem'.

**Item Card:** Click on an item to open its detailed view.

*Includes:* Item updates, subitems, files, and links to linked items.

**Item Updates:** Use the 'Updates' tab within an item to communicate with team members, share files, and add notes.

**Adding Files:** Drag and drop files directly onto an item or use the 'Files' column/tab.

**Duplicating Items:** Right-click an item -> 'Duplicate Item'.

**Deleting Items:** Right-click an item -> 'Delete Item'. (Caution: This is permanent).

### Key Board Elements (Columns)

**Groups:** Horizontal dividers on a board to organize items (e.g., 'To Do', 'Doing', 'Done').

*Adding Groups:* Click '+ Add Group' or click the '+ Add' button at the top of the board.

**Columns:** Vertical fields that hold specific information for each item (Status, Person, Date, Text, Numbers, etc.).

**Adding Columns:** Click the '+' at the end of the column headers. Choose from the Column Center.

**Status Column:** Essential for tracking progress. Customizable labels and colors.

**Person Column:** Assign team members to items. Integrates with user profiles.

**Date Column:** Set deadlines and track timelines. Can include time.

**Text Column:** Free text field for notes or descriptions.

**Numbers Column:** For numerical data, allows calculations (Sum, Average, etc.).

### Navigation Tips

**Left Sidebar:** Access Workspaces, Boards, Dashboards, Search, Inbox, My Work, Files.

**Search Everything:** Use the magnifying glass icon (or **Cmd + B** / **Ctrl + B**) to search across all boards and workspaces.

**Inbox:** View all notifications, mentions, and updates relevant to you.

**My Work:** See all items assigned to you across all boards.

**Recent Boards:** Quickly access recently visited boards from the sidebar or search.

**Board Views:** Switch between different visualizations of your board data (Table, Kanban, Calendar, etc.) using the buttons at the top-left of the board.

**Profile Settings:** Click your profile picture in the top-right for account settings, notifications, and integrations.

# Managing Data and Views

## Filtering Data

<b>Opening Filter:</b> Click the 'Filter' icon at the top of the board.
<b>Shortcut:</b> <code>Cmd + F</code> (Mac) / <code>Ctrl + F</code> (Win)
<b>Basic Filters:</b> Filter by Person, Status, Date, Text, etc., by selecting column values.
<b>Filter by Me:</b> Quickly show only items assigned to you in a Person column filter.
<b>Adding Conditions:</b> Use 'AND'/'OR' to combine multiple filter criteria.
<b>Saving Filters:</b> Save frequently used filters for quick access. Click 'Save as new filter view'.
<b>Clearing Filters:</b> Click the 'X' next to the active filter indicator.
<b>Filter Everything:</b> Use the main search bar ( <code>Cmd/Ctrl + B</code> ) to filter across multiple boards.

## Grouping Items

<b>Default Groups:</b> Boards start with default groups (e.g., Working on It, Done).
<b>Creating New Groups:</b> Click '+ Add Group' button or the '+ Add' button and select 'New Group'.
<b>Renaming Groups:</b> Click on the group title to edit.
<b>Collapsing/Expanding Groups:</b> Click the arrow icon next to the group title.
<b>Moving Items:</b> Drag and drop items between groups.
<b>Duplicating Groups:</b> Right-click the group title -> 'Duplicate Group'.
<b>Archiving Groups:</b> Right-click the group title -> 'Archive Group'. Hides the group and its items.

## General Shortcuts

<code>Cmd + B / Ctrl + B</code>	Open 'Search Everything'
<code>Cmd + F / Ctrl + F</code>	Open board-specific filter
<code>Cmd + K / Ctrl + K</code>	Quick add item (from anywhere)
<code>Cmd + \ / Ctrl + \</code>	Collapse/Expand left sidebar
<code>Esc</code>	Close any open window or popup
<code>Cmd + Click / Ctrl + Click</code>	Open item in new tab
<code>Shift + Click (items)</code>	Select multiple consecutive items
<code>Cmd + Click / Ctrl + Click (items)</code>	Select multiple non-consecutive items

## Sorting Data

<b>Opening Sort:</b> Click the 'Sort' icon at the top of the board.
<b>Adding Sort Criteria:</b> Choose a column to sort by.
<b>Sort Direction:</b> Choose 'Ascending' or 'Descending'.
<b>Multiple Sorts:</b> Add multiple columns to sort by, determining the hierarchy.
<b>Saving Sorts:</b> Save combined filter and sort settings as a new view.
<b>Clearing Sorts:</b> Click the 'X' next to the active sort indicator.
<b>Sorting within Groups:</b> Sorting applies to items within each group independently unless a global sort is applied.

## Board Views

<b>Table View:</b> Default view, shows items in rows and columns.
<b>Kanban View:</b> Visualize workflow phases, typically based on a Status column.
<b>Calendar View:</b> Display items with Date or Timeline columns on a calendar.
<b>Files View:</b> See all files uploaded to the board in one place.
<b>Gantt View:</b> Project timeline visualization using Timeline or Date columns.
<b>Adding Views:</b> Click '+ Add View' at the top-left of the board. Choose from the View Center.
<b>View Settings:</b> Each view has specific settings (e.g., choosing the Status column for Kanban, Date column for Calendar).

## Item Editing Shortcuts

<code>Enter</code>	Add new item below current
<code>Shift + Enter</code>	Add new item above current
<code>Tab</code>	Move to the next editable cell (right)
<code>Shift + Tab</code>	Move to the previous editable cell (left)
<code>Cmd + Up / Ctrl + Up</code>	Move item up within its group
<code>Cmd + Down / Ctrl + Down</code>	Move item down within its group
<code>Cmd + D / Ctrl + D</code>	Duplicate selected item(s)
<code>Cmd + Delete / Ctrl + Delete</code>	Delete selected item(s)