

Trello Orientation

1. Trello is a project management software that helps organize teams around a project. Specific tracking of deliverables through computer or application
 - a. Need to set up an account: <https://trello.com/>
 - b. Helpful to also download the app (Trello): FREE
2. Orientation to Trello Main Screen
 - a. ICONS (Top RIGHT Corner of screen):
 - i. Account information
 1. Edit Profile (add photo, bio, etc.)
 2. Edit Settings → Notifications
 - a. This will adjust how often you receive notifications about updates either via email, your app, or both
 - b. To receive notification click the Watch button on the card you are want information on.
 - ii. Notification icon (Bell)
 1. Turns red when you have a pending notification
 - iii. Information icon (i)
 - b. BOARD (Top LEFT corner of screen):
 - i. Project management “terminology”
 1. Board is the name of the committee/SIG or it can be a single project if quite large
 2. List within each board categories can be set up for the project (left to right across screen; use bottom search bar to navigate)
 3. Card within each list these are tasks. Can be set up as individual or grouped together.
 - c. MENU (below the icons on RIGHT side of screen)
 - i. Shows you who has access to the board (at the top)
 1. This is where you can change who is invited and permission level
 2. Click on a member’s picture or initials → Change permissions → select Member vs. Admin
 3. Also can see the person’s activity level
 - ii. Customize your board (change background, filter cards, etc.)
 - iii. View archived lists
 - iv. Subscribe to lists (different than being a member of a list)
3. Project Management Functions
 - a. Lists are usually organized chronicity but can be adjusted to however you want to
 - b. Cards have many properties that we can manipulate related to a given task
 - i. Start with Blank Card example
 1. Description
 2. Add Members
 3. Add Labels

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4. Checklist
 5. Due Date
 6. Attachments (photo will add visual appeal to board; can just be text; can include documents that are “permanent” (ie. word) or link to “living” documents (ie. Google doc)
 7. Comments (you can tag a member here; provide updates; etc)
- ii. Example card
 1. Due date, checklist, comment, etc.
 2. As things change, the card will update
 - a. ie. checklist will turn green when all items are done
 - b. card will change color as due date approaches
 - iii. Can “copy” cards if you anticipate using a similar set-up for most courses
 - iv. Filter cards
 1. Member
 2. Task
 3. Due date
 4. Etc.
 - v. Checklist – a card can have a check list created on it that can then be added to other cards in the future.
- c. Suggested flows:
 - i. If there are multiple projects going on for a group creating the main headers they cards can move between such as Proposed – In Progress – Done
 - ii. If the project is large it can be broken down either by month or by assigned area.