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A GUIDE TO

♆ Trello

FOR LIFE AND PROJECT MANAGEMENT

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A Guide to Trello for Life and Project Management

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Trello can help you manage any type of project, from personal and home to work and school.

Using it is much easier than many probably expect and it really can be used for most any project. How does it work? What can you do with it? Where do you start? This ultimate guide to Trello will help you understand the basic structure, the navigation, and of course, how it can be useful to you.

Basic Structure

Trello is comprised of boards, lists, and cards for a complete organizational package.

Boards

Boards are located on the main section called the Boards Page and contain the lists and cards. You can create various boards such as work, school, and home. Or if you only use Trello for school, for instance, you can create a board for each class. Think of the boards as projects with all relevant pieces inside of them.


Lists

Lists are the main parts inside of the boards that contain cards. You should begin by creating your lists to include the major pieces of the project. For example, a board for English class may contain lists for homework, term papers, and group assignments. As another example, a board for freelance writing may contain lists for article ideas, submitted articles, and published articles.

Cards

Cards are the details that live within the lists. Using the above example for English class, the homework list may contain cards for each homework assignment. For the freelance writing list of article ideas, you could use a card for each separate idea.
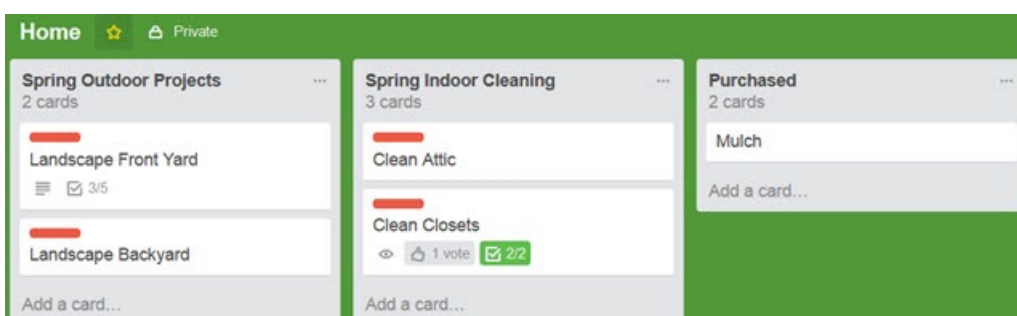
Board Details

Each board has features for visibility and customization.

Visibility and Access

Trello offers three forms of access to your boards, each with a specific purpose.

1. **Private** means that only people with access to the board can view and edit it.

2. **Team** means that the board is visible to team members and only those added to it can edit it.

3. **Public** means that anyone with a link to the board can view it and it may be found in search engine results. However, the board can only be edited by people added to it.
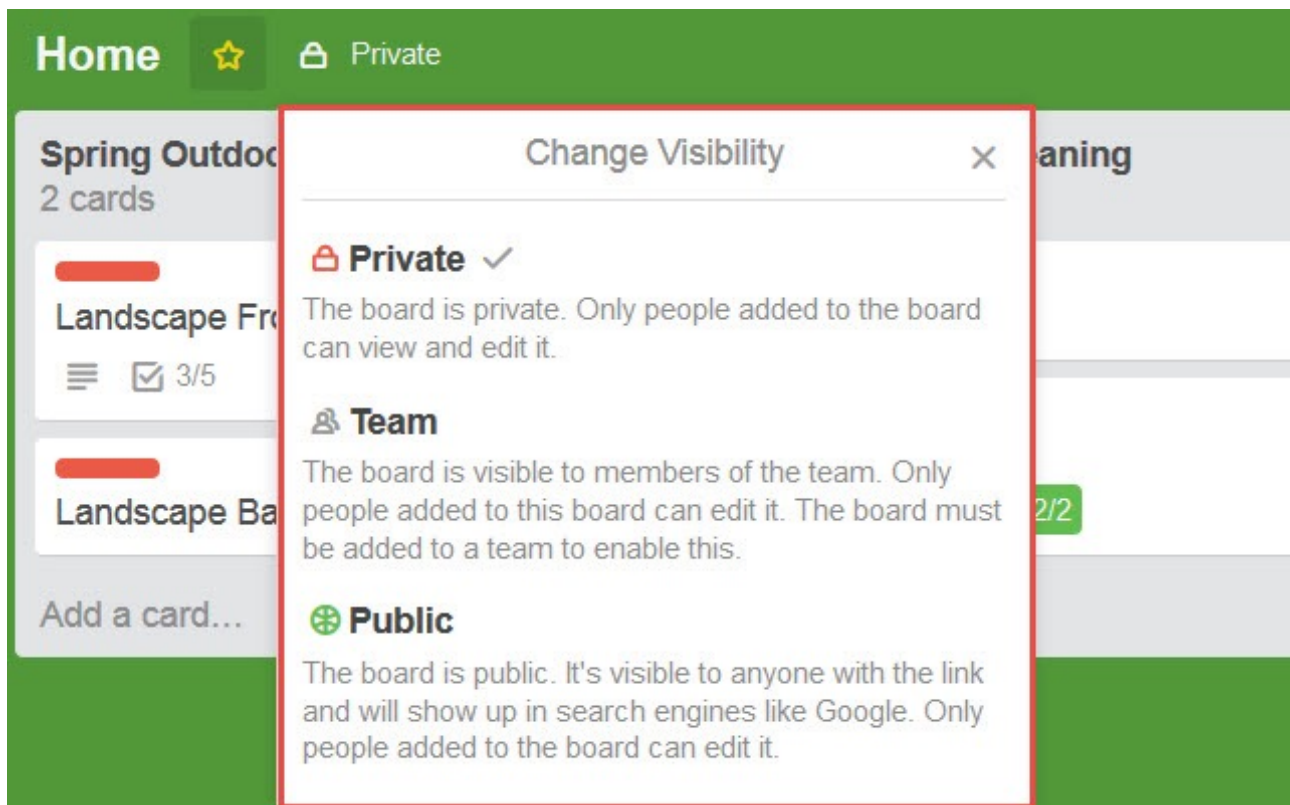

## Customization Options

Boards have five main features to customize the look and feel. These can be accessed from the board menu.

1. **Background** options include nine different colors.

2. The **Filter Cards** option allows you to see all similar cards based on keyword, label, person, or due date.

3. **Power-Ups** are add-ons that can be included such as a calendar, card aging, and voting ability.

4. **Stickers** are whimsical add-ons that can be dragged and dropped onto cards within a board. There are 12 different options.

5. The link entitled **More** in the menu has its own set of options to view permission settings, labels, archived items, email-to-board settings, and the ability to copy, print, export, and subscribe. You can close the board as well as copy the provided link to share the board.
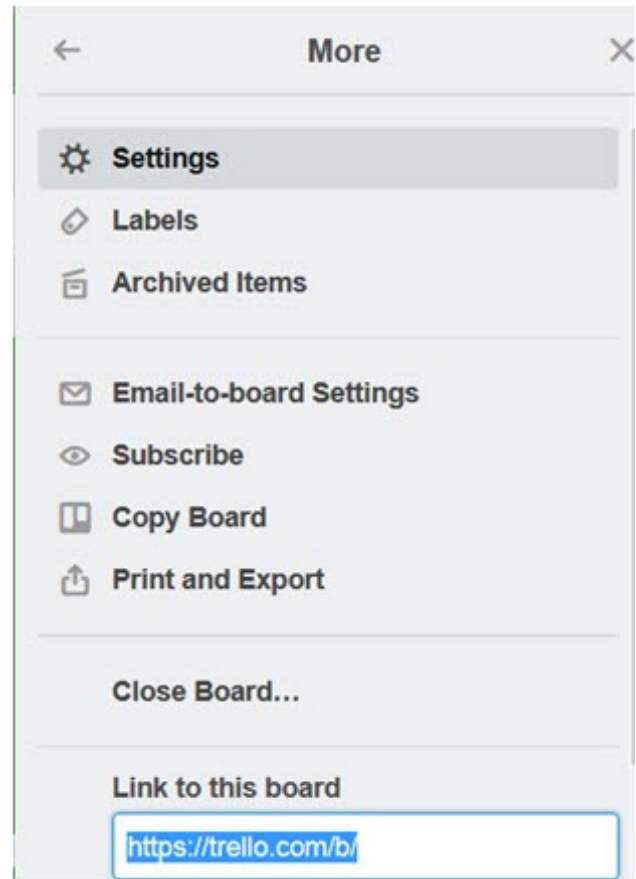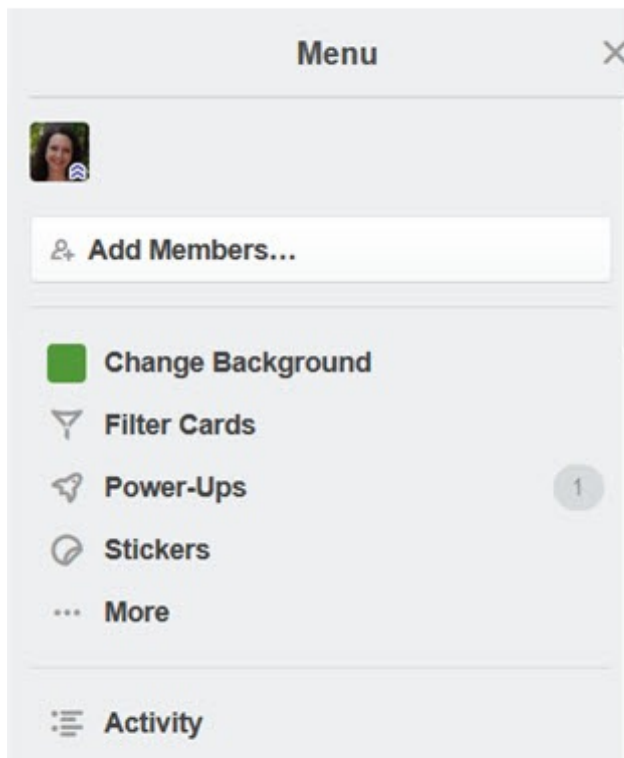
List Details

List features and options are very basic. You can add, copy, move, subscribe, and archive lists by selecting the **More Options** (three-dot) icon next to the list name. You can also move or archive all of the cards within a list. Think of Trello lists as task lists and the cards as the tasks.
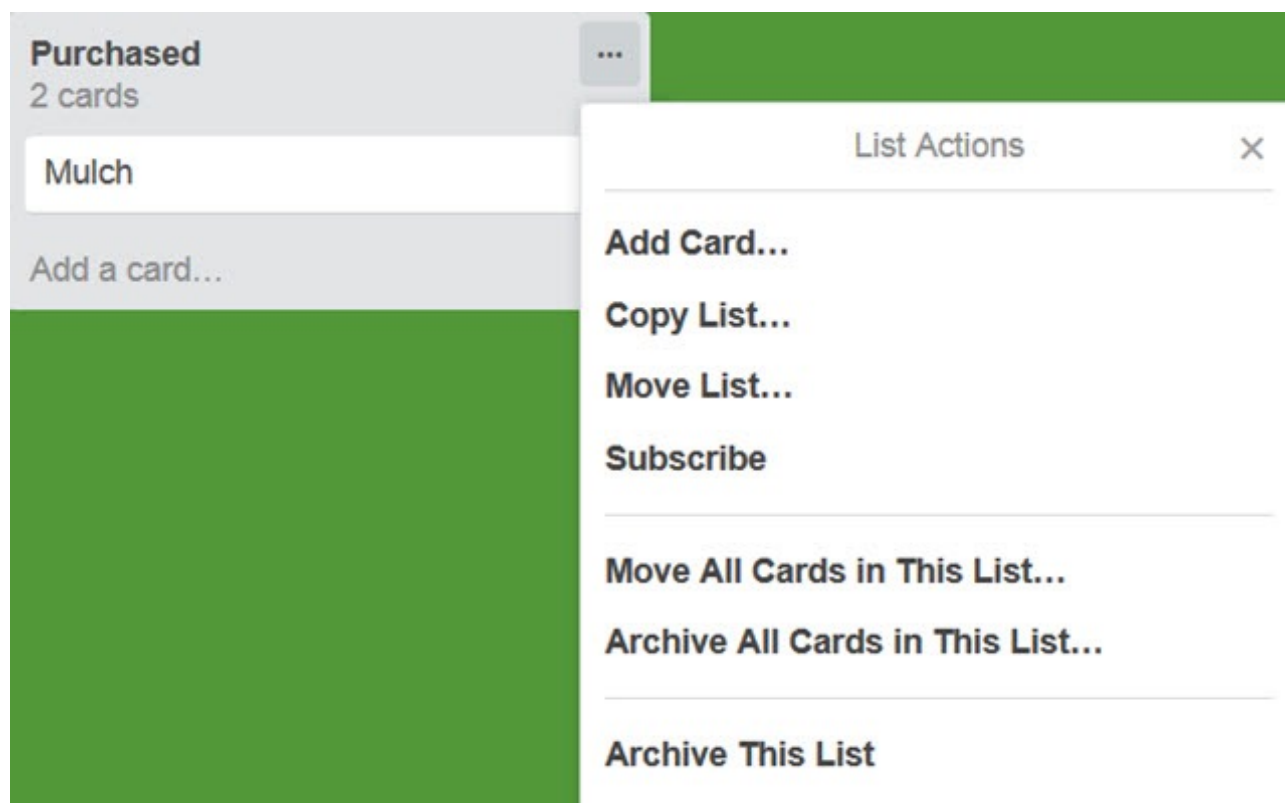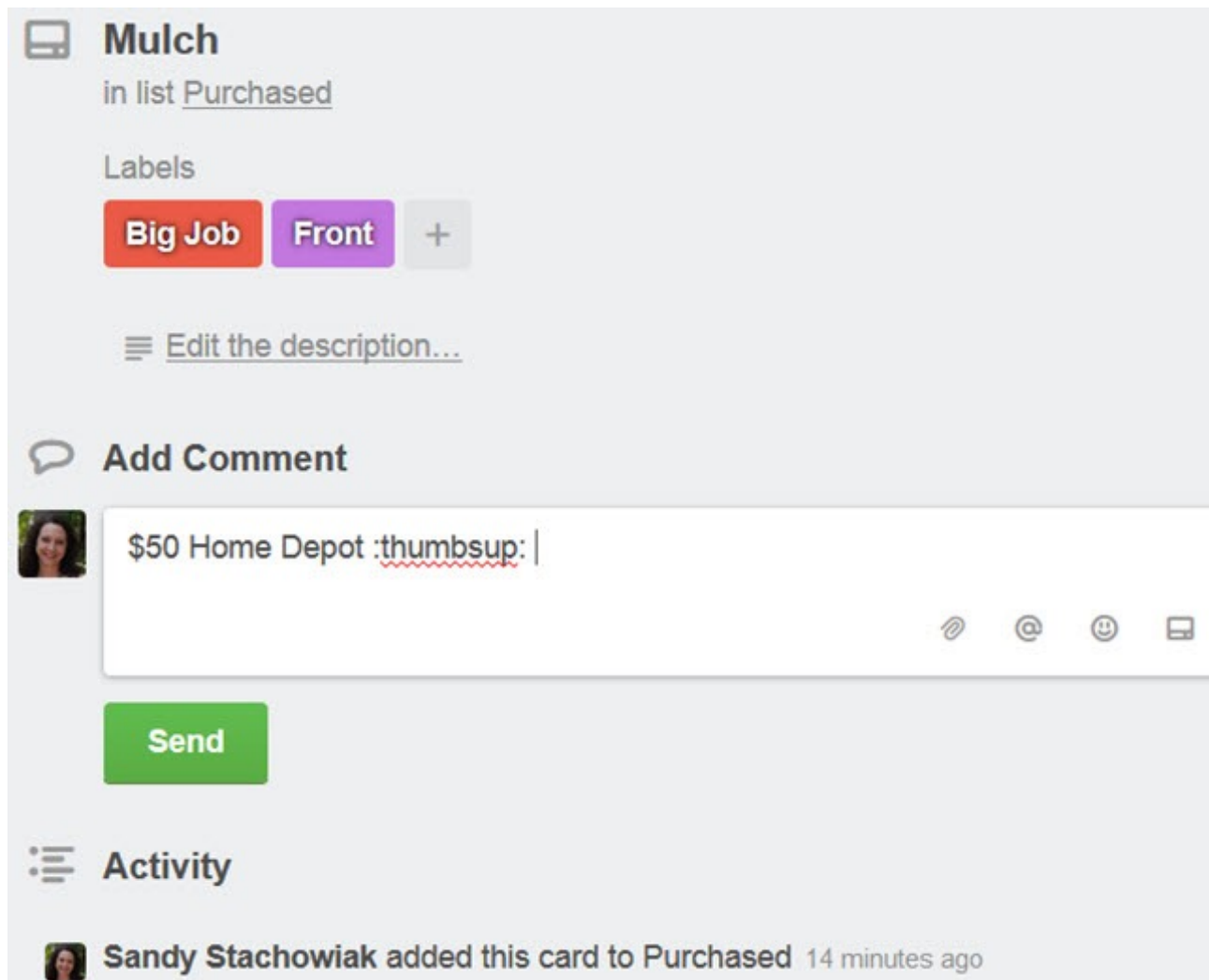
Card Details

Cards by far have the largest amount of features and options. This is because they include all extensive details. Think of them as to-do items that hold all of the information within a task list.

Comments and Activity

Both comments and activity are immediately viewable on the main section once a card is opened. Each card can have comments added to it. The actual comments can include attachments, mentions to team members, emojis, and other cards nested within it. Activity shows exactly that, every action that has been taken on a card along with the date, time, and person who took the action.

Add Section

The right side of the card contains a list of five items that can be added to a card to further drill down the details.

1. **Members** lets you add a current team member to a card.

2. **Labels** lets you add one or more labels to the card, which work similar to tags. You can search for, select, or create a new label. Labels can include a title and color for easier organization.

3. **Checklist** lets you add a handy checklist with an option to copy one from another card. Or, you can simply add the checklist and begin adding items to it. Then, as the items are checked off of the list, the progress bar along with percentage complete will be displayed.

4. **Due Date** lets you select a date along with the time for the card.

5. **Attachment** lets you select a file to include in the card. These options include a local file or one from Google Drive, Dropbox, Box, or OneDrive. A link can also be attached to a card.

Action Section

Beneath the Add section is the Action area which also include five options.

1. **Move** lets you move the card to another board or to a different list along with an option to choose its position within that list.

2. **Copy** lets you copy the card with a different title and has options to keep attached items such as a checklist, sticker, or label. You then select the board or list where you would like the copy and if you choose a list, you can pick its position just like with the **Move**

3. **Subscribe** lets you subscribe to a card so that you are notified of activity on it.

4. **Vote** lets you cast a vote for the card which can be helpful in team environments.

5. **Archive** lets you move the card to the archive board or simply delete it.

A **Share and More** link under the Action section lets you print, export, email, or link to the card.

Web Navigation

When you arrive on the Trello screen after signing in, you will see all of your boards. Those you have starred as favorites are at the top.

Top Navigation

Moving from left to right across the top of this screen, you have various options.

Boards Drawer (Button)

The Boards button is called a Drawer and drop-down box will display a list of your boards along with a search option. The button remains in the top navigation for quick switches to other boards.

Search Box

This keyword search will look for your word or phrase across all items on all boards and cards.

Trello Button

You can click the Trello button in the very center to return to your main screen at any time to see all of your boards. It will redirect you to the Boards Page, just like after you have logged in.

Plus Button

This button allows you to quickly create a board, personal team, or business team.

Your Name Button

Clicking the button with your name on it brings up features that allow you to manage your Trello account. The drop-down box shows six options along with a link to log out. Whether you select **Profile**, **Cards**, or **Settings**, you will be taken to the same basic screen where those three options will be again displayed as tabs across the top of the page. Useful links for **Shortcuts**, **Help**, and a link to **Change Language** are also contained within this area.

1. **Profile** allows you to view all of your activity with direct links to the boards and cards where that activity took place.

2. **Cards** allows you to view all cards that you have been added to and they can be sorted by board or due date.

3. **Settings** allows you to change your name, initials, biography, avatar, or password. You can add a new email address, adjust your email and desktop notifications, enable accessibility, and view all applications that you have connected to Trello with options to revoke them. You also have the option to enable two-factor authentication for added security.

4. The **Trello Gold** tab will provide your account information if you are a member or allow you to subscribe for additional benefits.
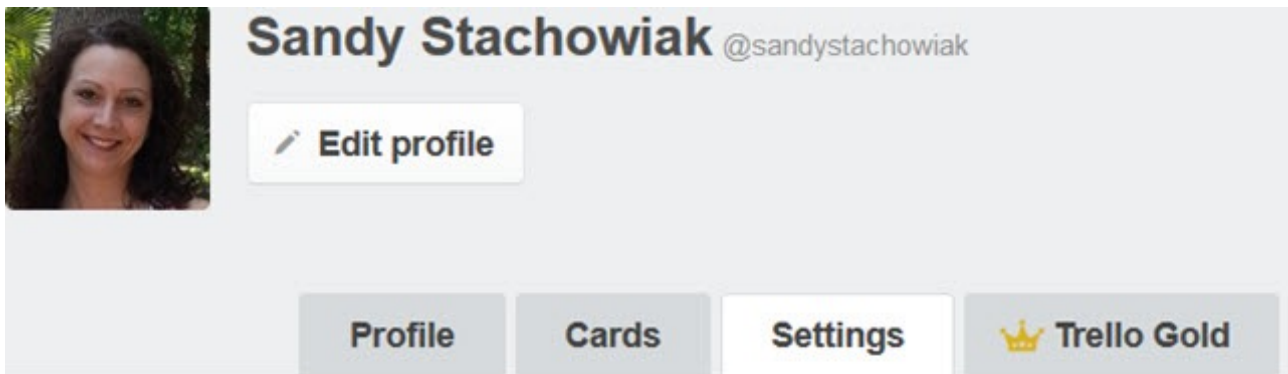
Information Button

The information icon button can be selected to receive tips directly from Trello. If you click one of the tips, you will be redirected to that page on Trello's website.

Notification Button

This area will display all notifications that you have received.

Board Navigation

Once you have selected a board to work within, navigating it is simple. You will see all of your lists with the cards contained inside them for a nice display of the overall project.

You will also notice that the top navigation remains and with it is another bar directly below it. From left to right, this board navigation bar allows you to change the board name, star it as a favorite, adjust the visibility, and access the board menu. If filtering is enabled, you will also see that label.

Add a List

You will always see an **Add a List** option inside your board all the way to the right of your current lists. Just click inside that box, give your new list a name, and hit the **Save** button.
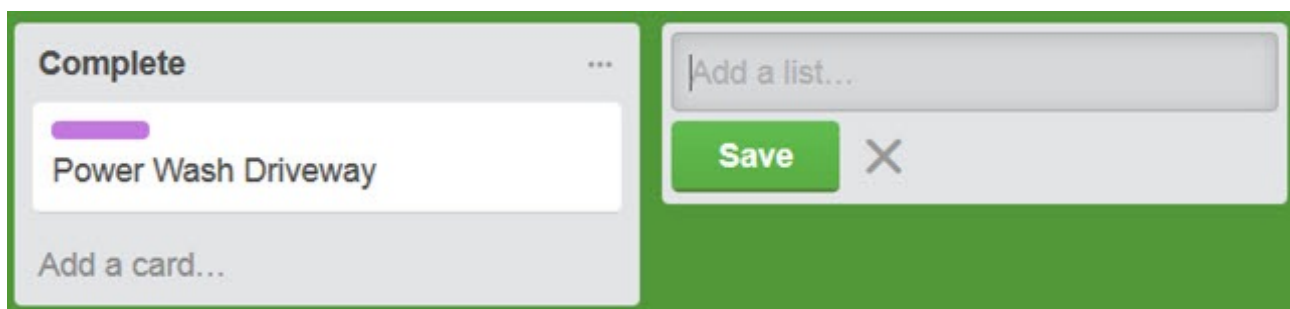
Move Lists and Cards

Trello offers a sleek and simple interface for moving lists and cards. Just put your mouse over the item you want to move and when the hand displays, click and drag. You can rearrange lists or move cards from one list to another very easily.
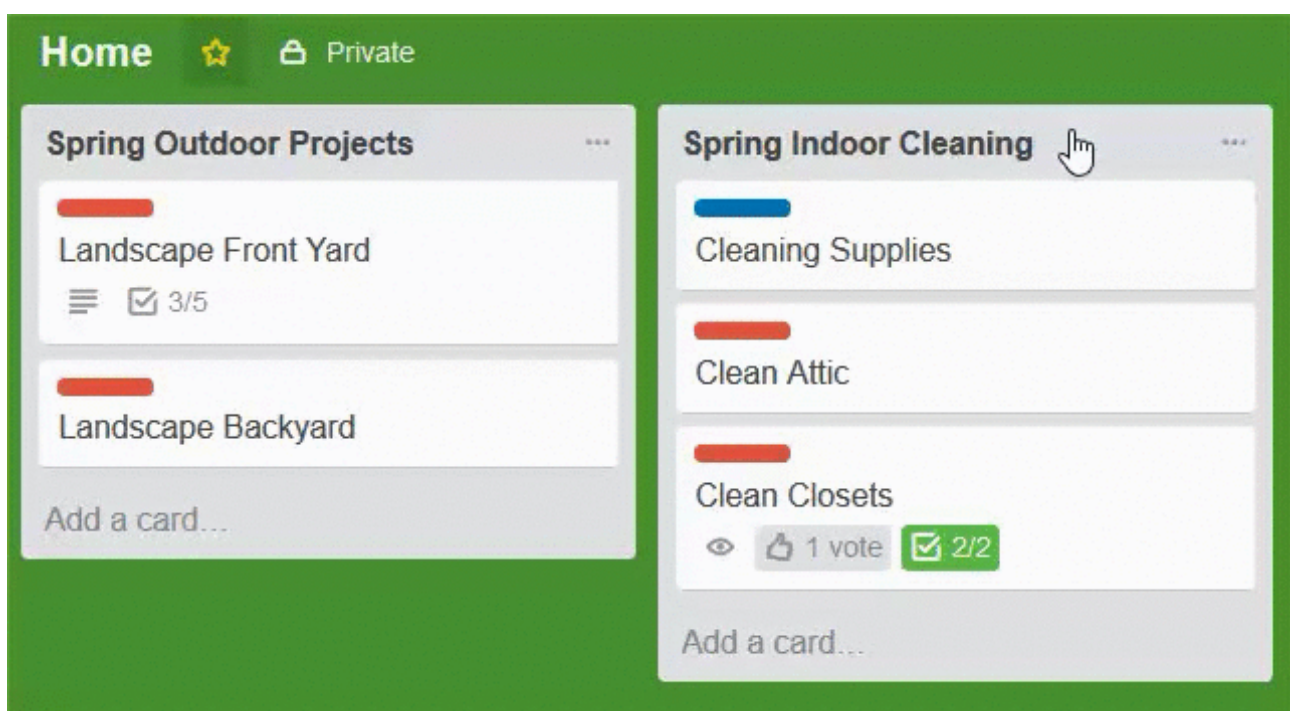
Open or Add a Card

You can open a card within a list just by clicking **Add a Card** at the bottom of the list. In order to create a card, you just give it a name and click **Add**. All additions and actions for the card can be configured afterwards. This is a handy feature allowing you to scope out the entire project before getting into the details.
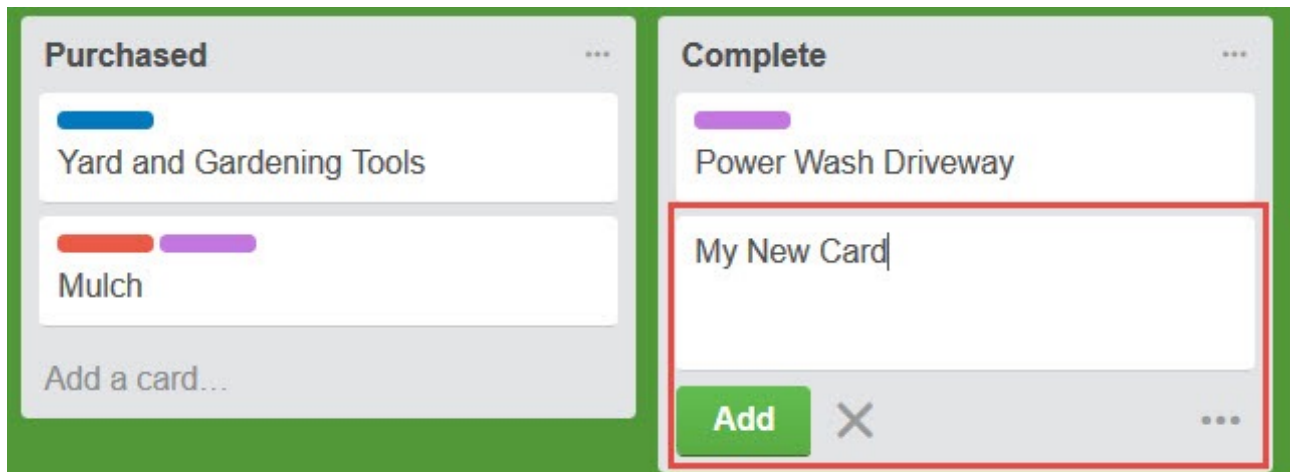
Usage Examples

Trello is a wonderful tool for managing projects for work, school, personal, home, and even financial planning. Here are just some examples of how you can use Trello for each of these.

While it is obvious that Trello can help project managers on the job, it can be used in almost any work situation for various types of activities and projects. For this example, we will use a department move from one building to another.

1. Create a board for the department move.

2. Within the board, create lists for the sections of the department: Internet Services, Programming, Clerical, and Completed.

3. Within the lists, create cards for activities to take place within each section. Internet Services may contain cards for cubicle setup, office furniture, and computer equipment. Clerical may contain cards for cubicle setup, office furniture, telecom, and office supplies.

4. Within each card, add all of the details. The computer equipment card for Internet Services may include a checklist with monitor, desktop, cables, and printers. The Clerical card for telecom may include putting in new phone lines, purchasing new phones, and testing phone extensions.

5. As each card is completed within its current list, it can be moved to the list of Completed items. This way, it is always clear of what still needs to be done and what has been completed.
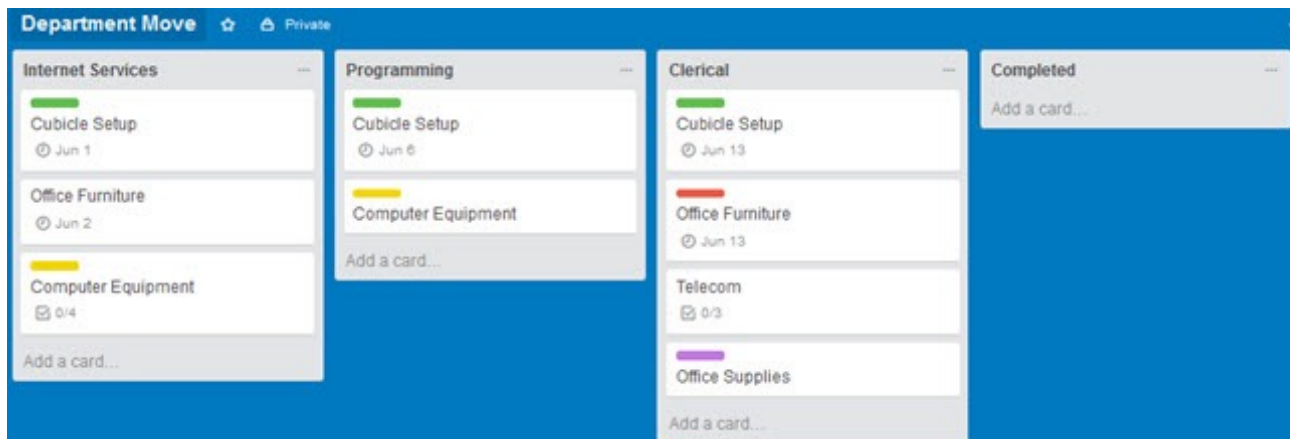
School

For this example, we will use a full-time college student. Here is one way they can go about using Trello to organize their semester.

1. Create a board for each class: Math, English, Psychology, and Nutrition.

2. Within each board, create lists for all actions for the class. Math may contain lists for Homework, Group Assignments, Online Tests, and Completed items. But, Psychology may contain lists for Homework, Term Papers, Group Assignments, Online Tests, and Completed items.

3. Within the lists, create cards for each assignment or item. The Math Homework list may contain cards for week 1, week 2, and week 3. The Psychology Term Paper list may include cards for each paper due by topic such as behavior, mental diseases, conditions in children.

4. Within each card, add all of the details. The Math Homework list card for week 1 may simply include a checklist for the sections due along with a due date. But, the Psychology Term Paper list for mental diseases card may contain a checklist for the paper sections, a due date, a reference link, a photo, and an attachment for the draft.

5. As each card is completed within its current list, it can be moved to the list of Completed items. This way, the student always has a clear view of what is due and has not been completed yet.
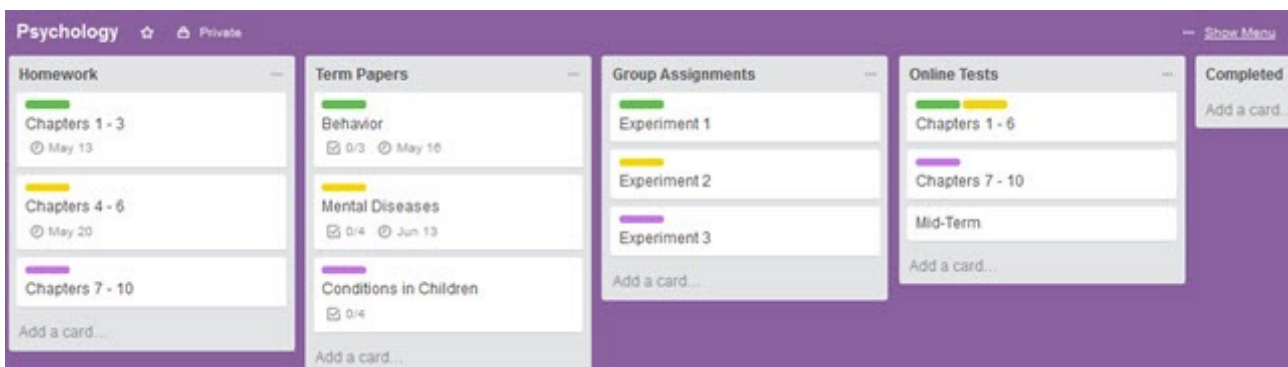
Home

From renovations to yard work, Trello can be a useful tool to keep home projects organized. For this example, we will use a spring landscaping project.

1. Create a board for the spring landscape project.

2. Within the board, create lists for all actions for the project. You may have lists for Backyard, Front Yard, Side Yards, and Completed tasks.

3. Within the lists, create cards for each item. The Backyard list may contain cards for bushes, trees, and flower garden. The Front Yard list may contain cards for driveway, walkway, and lamp post.

4. Within each card, add all of the details. The trees card for the Backyard list may include a checklist for obtaining tree-trimming estimates, selecting a trimmer, scheduling a trimming date. The lamp post card for the Front Yard list may contain a checklist for paint the base, install a motion sensor, and purchase light bulbs. But, might also include a person in the family to do the job as well as a due date.

5. As each card is completed within its current list, it can be moved to the list of Completed tasks. This way, you always have a clear view of what is remaining and what has been completed.
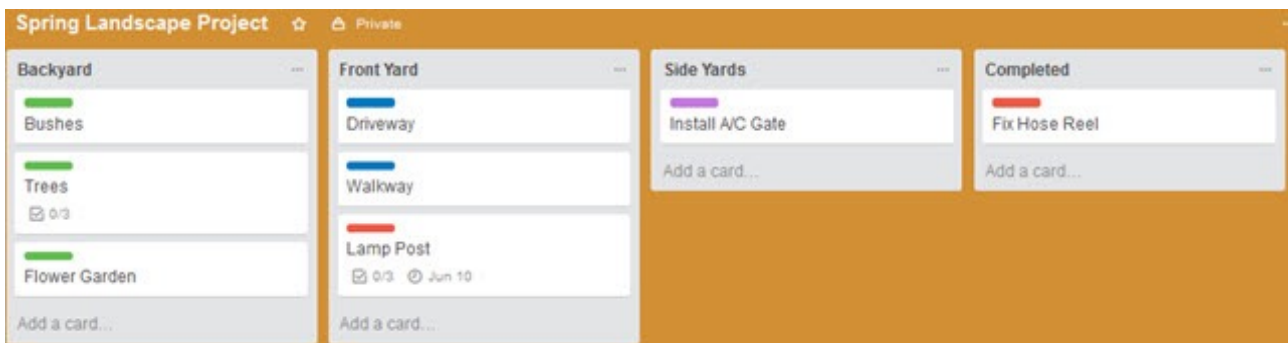
Personal

You may not think of Trello as a personal management tool, but it can certainly be used for your individual projects and goals. For this example, we will use goals for the year.

1. Create a board for the current year.

2. Within the board, create lists for each goal. You may have lists for Exercise, New Job, Financial Savings, and Completed tasks.

3. Within the lists, create cards for each item. The Exercise list may have cards for speak to physician, research workout routines, and join a fitness center. The New Job list may have cards for resume, job websites, and locations to apply.

4. Within each card, add all of the details. The join a fitness card for the Exercise list might include links to relevant websites for local gyms, budget details, and a checklist to call the fitness centers. The New Job list card for resume may include a due date, resume draft attachment, and a links to resume writing websites.

5. As each card is completed within its current list, it can be moved to the list of Completed tasks. This way, you will be able to see exactly where you fall with your goals for the year.
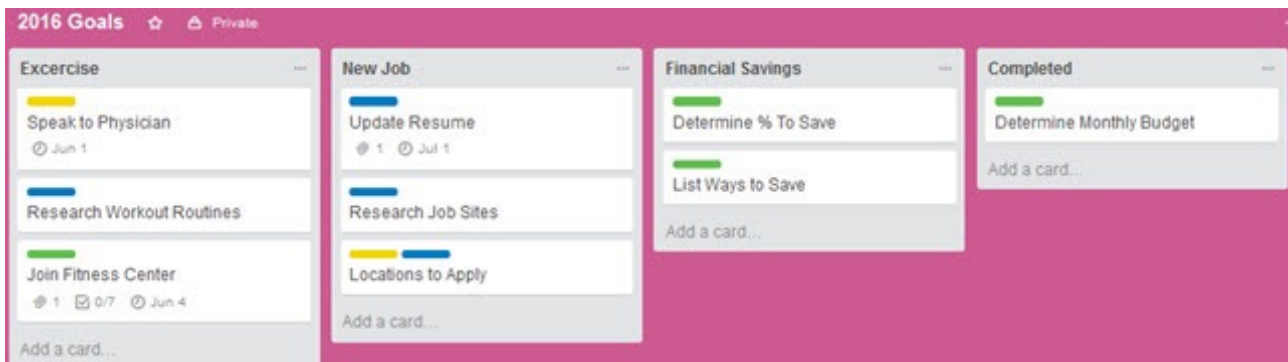
Financial

For planning financial aspects of your life from college to retirement, Trello can be a useful tool. To help you get started, Trello offers a financial planning template.

1. The handy template includes lists for Baby Steps, Doing, and Done. However, you can of course use your own lists if you prefer. Maybe you would like lists for your child's college savings, your own retirement, and paying off your current credit cards.

2. Using the template, you can quickly and easily view the steps you should take to get you to your goals. The first step is the first card and includes saving $1,000 in an emergency fund. The second step is the second card is for paying off all debt except for the mortgage. These cards are both within the Baby Steps list.

3. Within each card are editable items to suit your needs. The emergency fund card has a checklist for the actions to complete that goal. The paying off debt card has a checklist as well with the amounts owed for each debt.

4. As you work through each of the steps in the Baby Steps list, you can move them to the Doing list. This way you know immediately what you are currently working on. Then, as they are completed, move them to the Done list so that you can concentrate on the uncompleted items at a glance.
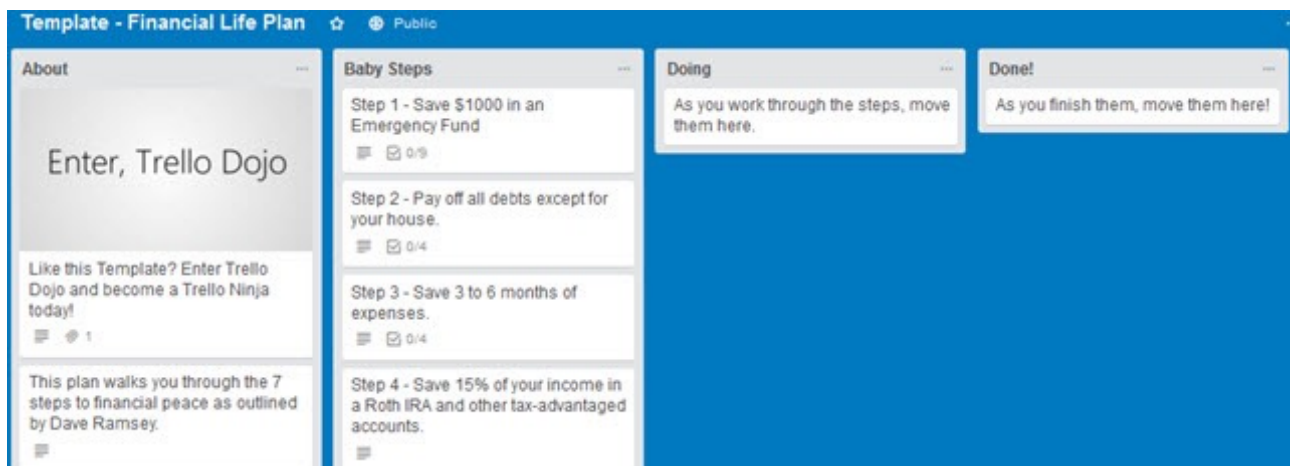
Mobile App Availability

Trello is available for free on mobile devices to make it even easier to keep track of projects and receive notifications on the go.

- On Android you can use Trello on your phone or tablet

- On iOS you can use Trello on both the iPhone and iPad
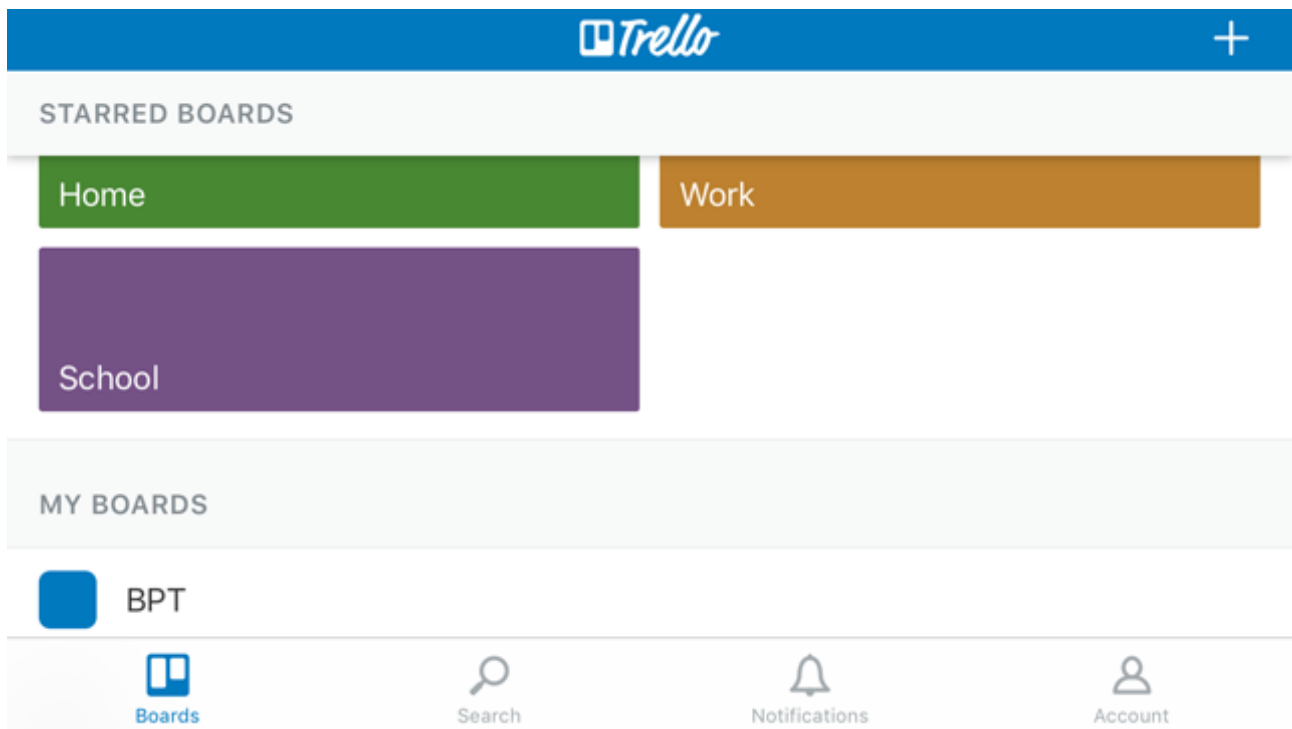
Trello Tips for New Users

If you are completely new to Trello and are ready to begin using the tool, you do not have to jump in feet-first. It may have extensive features, but its ease-of-use will make you a pro in no time. Here are just a few helpful tips.

- **Start with a simple project** or even a sample one. Begin with something small that includes just a list or two and a card or two. This will get you used to the navigation and features.

- **Experiment with the features**. Just because there are dozens of options, that does not mean you need to use them all. Play around with checklists and attachments to see if you really need them for your project.

- **Check out the Trello tips**. The company is good at providing helpful tricks and you may just discover something that you love. So, tap that Information icon in your navigation bar when you have time to discover a new item.

- **Take advantage of the reminders**, especially if you want to use Trello on your mobile device. This will keep you in the loop for team projects and on track for personal ones.

- **Have fun with it and make it yours**. Trello has some wonderful features for changing the background color of your board which can include a neat sticker. Why not use these extra features to personalize your experience?
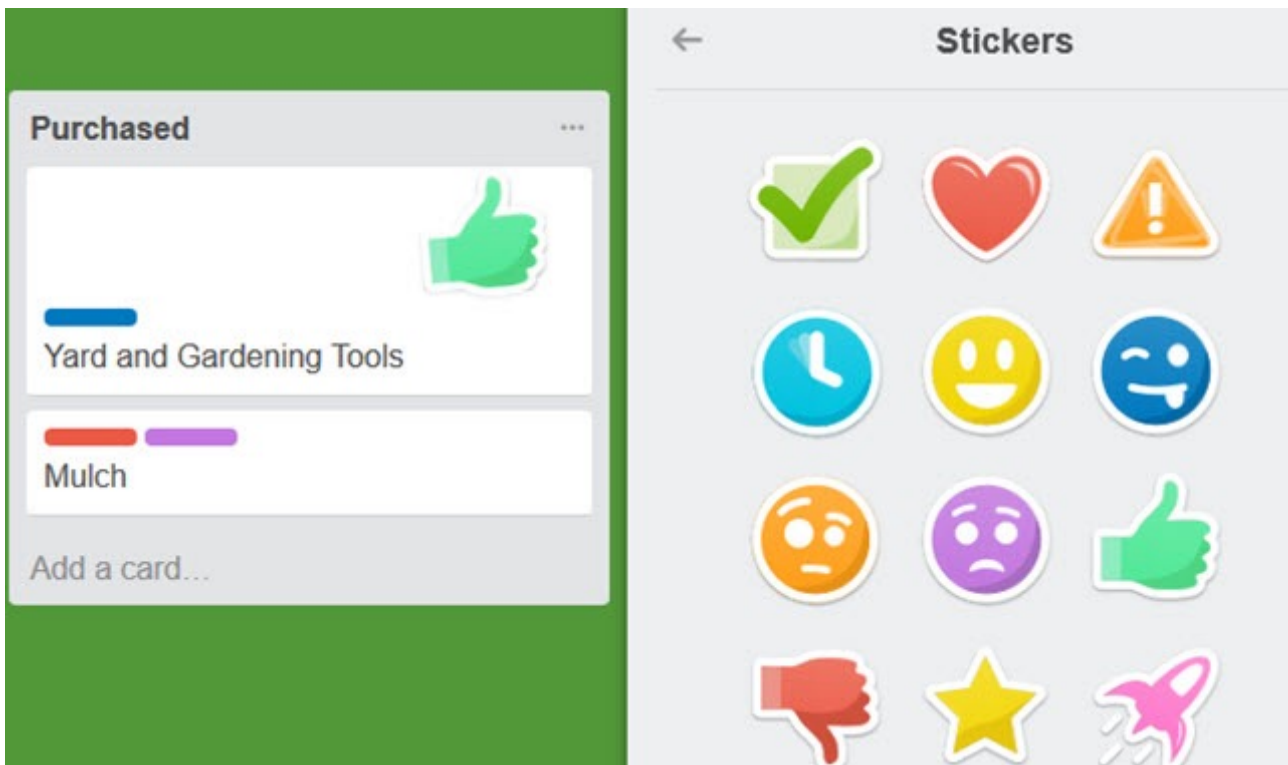
For Additional Help

Another of the great features of Trello is that it has an easy-to-access and informative Help section. To access this area, click the Information button from the top navigation, select **More**, and then **Help**. This will direct you to the Help section on the Trello website.
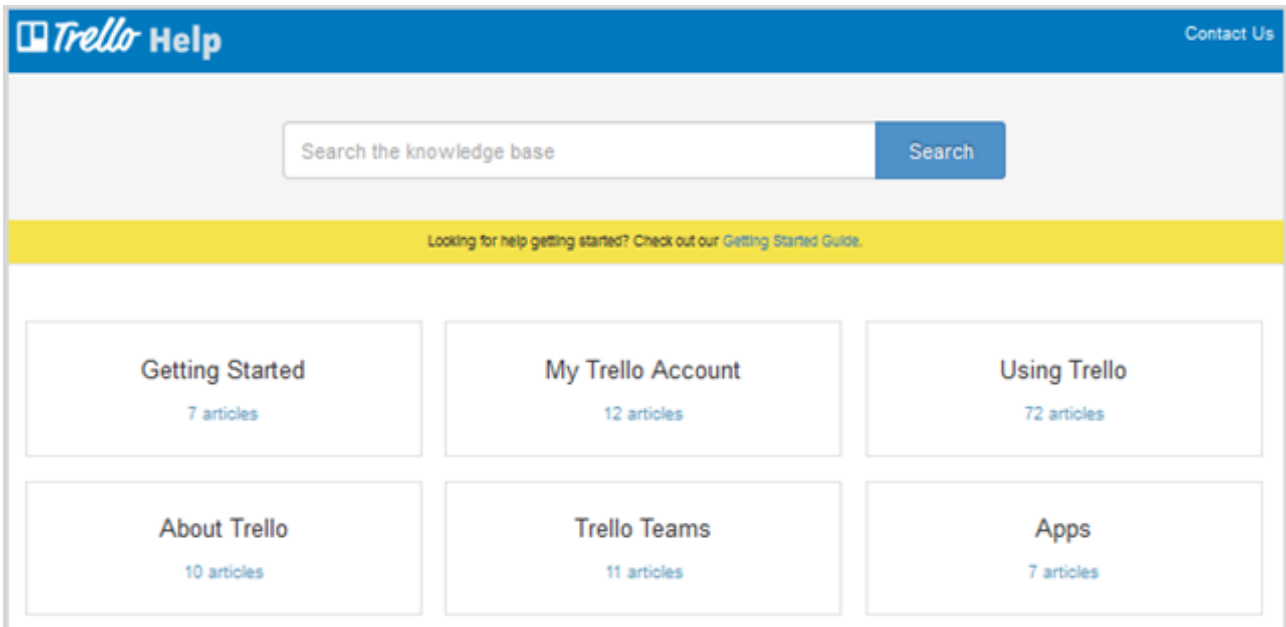
You will then see various categories to choose from including Getting Started, Using Trello, and Troubleshooting. You can also enter a search term at the top to access specific topics in the knowledge base.
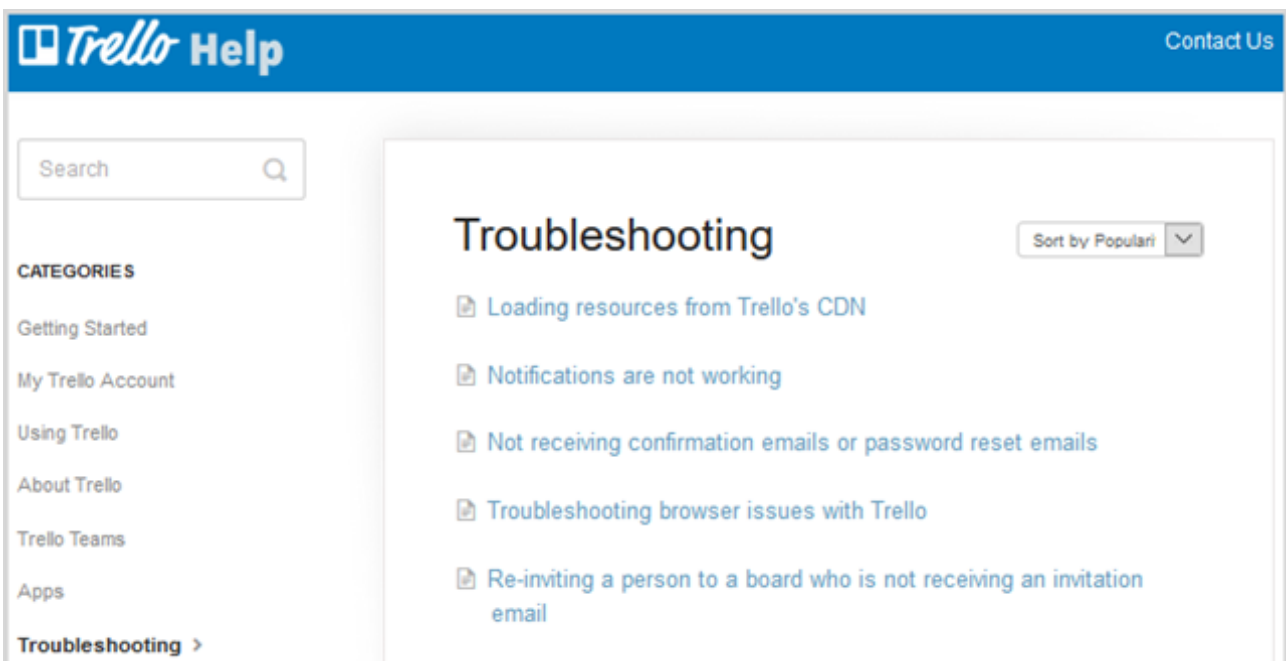
Each category of the Help section provides you with articles and useful information. Items can be sorted for easier viewing and you have an option to print an article you choose by clicking the print icon at the top of the page. If you are still having difficulties, the Contact Us link at the top will allow you to send the Trello team a message.

Have You Tried Trello?

Once again, Trello can be a valuable tool for managing most any project, big or small, business or personal. Its ease of use, mobile app availability, and extensive features make it a tool worth trying if you have not already.

Feel free to share your thoughts with us on regularly using or trying Trello for the first time.

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