Trello - An Open-source Tool for Project Management

Contents

Chapter 1. An Overview of Trello

This page provides an overview of Trello, an open-source application, which is used to organize your work.

Trello is an effective project management tool to organize your to do lists. It provides you flexibility to monitor tasks, notes, projects, shared files, or anything important for project management that can help your team work together. You can also rearrange tasks as per priorities. The Kanban boards let you keep multiple tasks in each card.

Using Trello, you can create cards to monitor tasks which are placed on lists. A list is used to organize cards and mark stages of progress. The multiple lists (when come together form a board) represent a single project.

Let’s take an example of how Trello is used for managing a development team:

You are using Trello to track To Dos of your development team of the current sprint. Then, you will need to create a board called Sprint (e.g. Sprint 12). Now, create cards for tasks such as microservice development, API development, and Coding, and move an individual task from ‘To Do’ to ’Doing’/ ‘Done’ as per progress of the task.

Chapter 2. Getting Started

Trello, an easy-to-use tool, which is owned by Atlassian.

Trello provides flexibility to collaborate with teams and to organize almost everything from daily business operations to a family vacation. It is a powerful project management tool with simplicity as its core strength. You can setup your Trello account free as it is an open source tool. Trello enterprise and business class are paid versions and provide many power-up features that are not given with basic Trello version.

A Trello board comes with four major components that cater unlimited possibilities for project management and team collaboration.

- Boards *(on page 5)*
- Lists *(on page 8)*
- Cards *(on page 7)*
- Menu *(on page 12)*

Chapter 3. Trello Landing Page

This page contains information the landing page of Trello web application and what options it provides to access directly from the landing page.

The landing page of your Trello account provides an insight of your dedicated board including what things to be done, the status of all your tasks, and bottlenecks of your project. It shows you the production workflow or the way your tasks are managed on the board. Trello brings limitless possibilities to customize different stages of your project to whatever way you like.

This page comes with the following options:

- Boards *(on page 4)*
- Cards *(on page 7)*
- Home *(on page 10)*
- Show Menu *(on page 12)*
- Accessibility Level *(on page 11)*
- User Profile *(on page 13)*
- View All Boards *(on page 4)*
- Butler *(on page 14)*

Icons on Landing Page

Add, Information and Notification icons are displayed at the top-right on your Trello account.

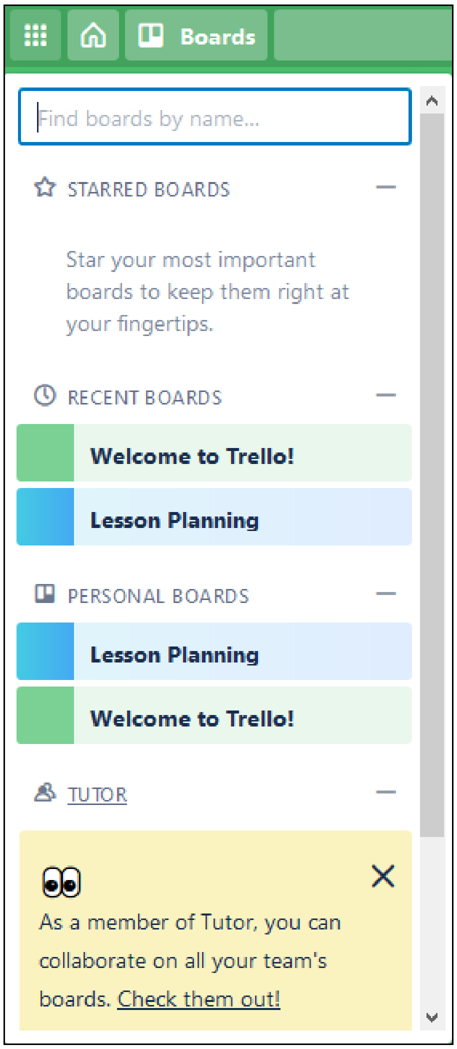
Table 1. Add, Information, and Notification Icons

Icons	Description
+	This plus icon lets you create a new board, team, and business team.
ⓘ	It information icon prompts you all information conveyed to team members who are associated with your board.
Bell icon	The notification bell icon lets you view notifications of your Trello account. You can also change the frequency of email notification and allow desktop notifications to view them from your account.

Chapter 4. Boards

Used to view all recent and personal boards created in your Trello account.

You can click **Boards** to view all recent and personal boards. If there are several boards in your Trello account, you can search them by their names. You can also mark a board as starred. You can create as many boards as you like on your Trello account. The design-businesses usually have a separate board for each client to keep everything simple and defined. While other teams often use one board to setup a team-sprint.



View All Boards

Dsiplays all boards created on your Trello account.

To view all boards available on your Trello account, click **Boards** button displayed at top-left on your Trello landing page. You can also view the recent boards and can search any board by its name.

Create a Board

Board is a place where you organize your projects and monitor tasks that need to be done and are getting done. A board is made of cards and lists. A list represents various stages of your project as a workflow while a card represents a task which you can move across lists from **To Do** to **Done**.

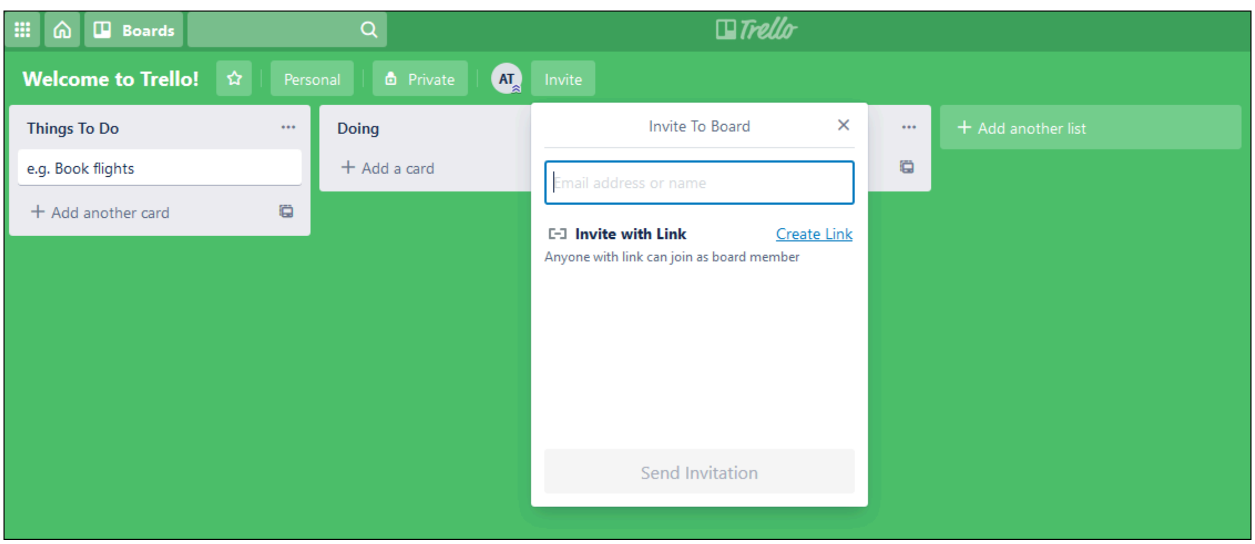
To add a board:

1. In the Trello header, click plus icon (+) and select **Create Board**.
2. Enter a title for the board.
3. You can select a board background theme if necessary.
4. You can set your board to be public, private or team visible. Select an option accordingly.
5. Click **Create Board**

Invite to Board

You can invite anyone whether a Trello member or not, to join as a board member. To invite non-Trello users, you need to provide their email address.

To send invitation to an existing Trello user:



1. Search user by his/her name.
2. Click **Send Invitation**.

An invitation link is sent on the email address to whom you sent the invitation. You can inivite multiple people at a single go, to join the board.

Chapter 5. Cards

A core unit of board which comes into the play when the list is ready.

The card is a fundamental unit of a board which represents tasks that need to be done (e.g. flight ticket booking to be done). You can assign a card to certain team members if needed.

Add a Card

The card is a fundamental unit of a board which represents tasks that need to be done. For example- Flight ticket booking to be done. You can also add cards in bulk using a spreadsheet or preparing a list. Copy items from the spreadsheet or list and paste them into a new Trello card. The line-separated items will be displayed into a new card.

To add a card:

1. Click **Add a card** at the bottom of a list.
2. Enter a title for the card (e.g. book a flight ticket). Keep the title easy and short to view the status of cards on a board. This makes easier for everyone to understand what task is to be done.
3. Click on the card to add additional information:
    - Due Dates
    - Checklist
    - Attachment
    - Description
    - Comments

Chapter 6. Add a List

A list represents various stages of your project as a workflow. By default, a board comes with three lists named **To Do**, **Doing**, anf **Done**, but you can rename them if required. You can add as many lists as you like, to your board to create a workflow.

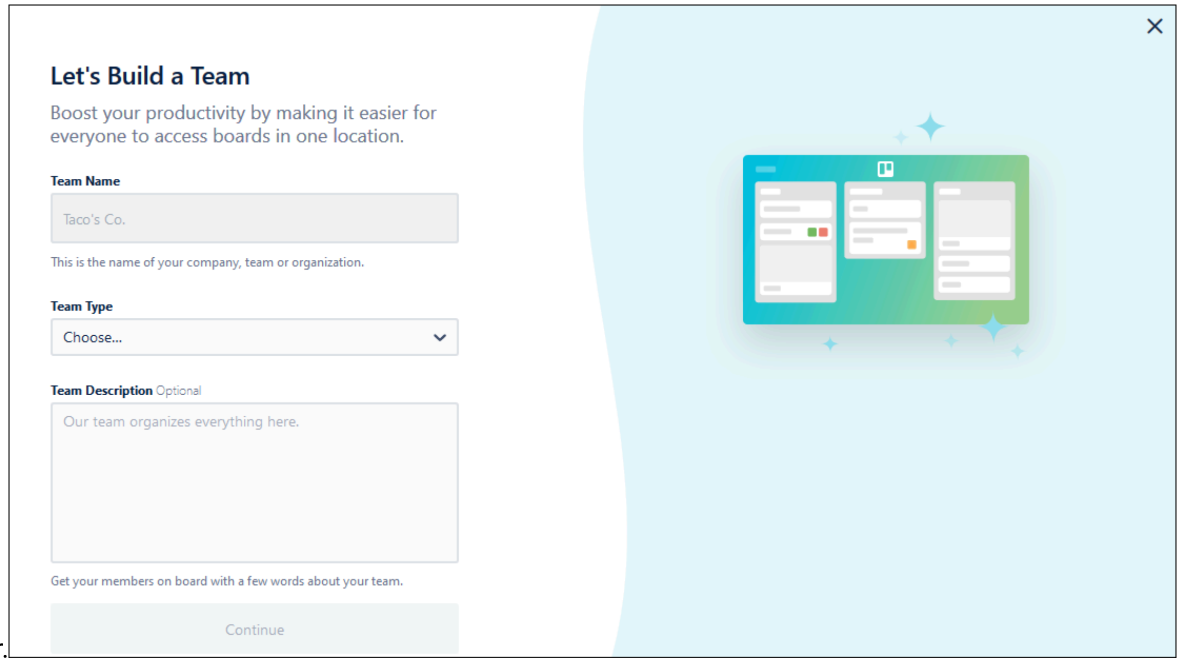
To add a new list:

1. Click **Add another list.**
2. Enter a title for the list. It is recommended to use short and simple name for lists such as “To Do”, but you can use any name as per your business requirements.
3. Click **Add List**.

Chapter 7. Build a Team

Team is nothing, but a group of people. You can build different teams as per your project, for example- Finance, HR, IT, Support, etc.

To build a team:

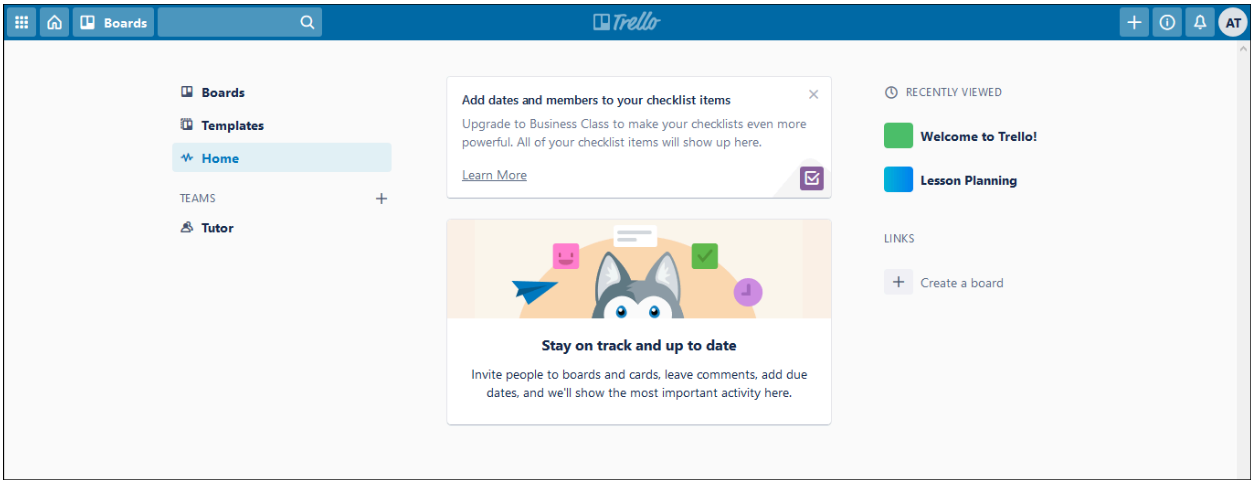
1. Click **plus icon (+)** displayed at the top right corner on the Tello header.

2. Enter a name for the team.
3. Select a team type from the dropdown.
4. Enter a description about the team.
5. Click **Continue**.

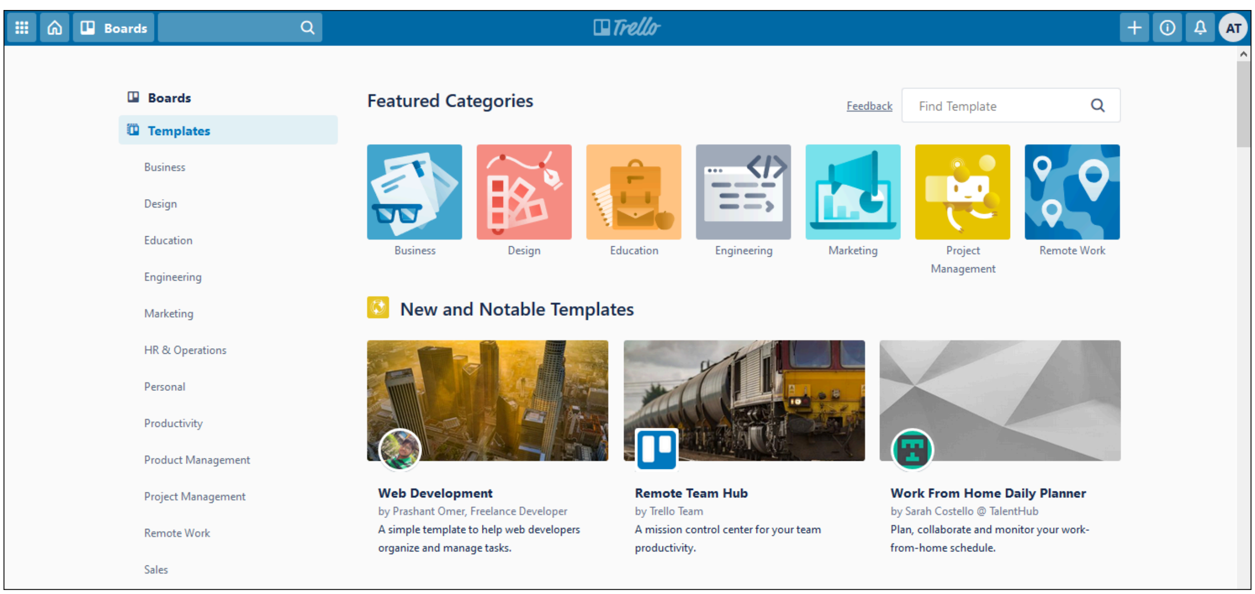
Chapter 8. Home

On click, the home icon displayed on the landing page navigates you to the home page of your Trelllo account.

The home page may vary for each account depending on the configuration done for the home page. It may also look different due to the theme and template selected for the account.



Trello comes with several standard templates for different domains, such as Engineering, Design, Business, HR & Operations, and so on. You can select any of them for your account or use a custom template of your choice.



Chapter 9. Accessibility Level

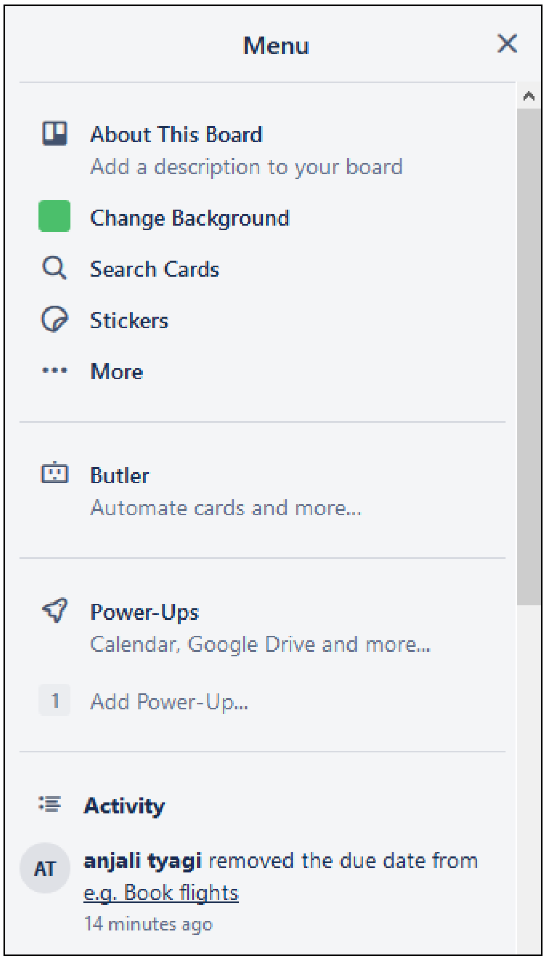
This page provides information about the accessibility options supporting to your board if configured via Trello basic account.

You can set your boards to be public, private or team visible. You can invite anyone either by searching name or entering email address, to join board as a member. If the invitation is sent to someone who does not have a Trello account, then it is received on the given email address along with a link to join the board.

Chapter 10. Show Menu

A place to control the settings of your account.

Show Menu contains various options to control the settings of your Trello account. You can change the setting as per your project requirements. The show menu button displays options to customize your Trello account; some of them are Change Background, Search Cards, Stickers, Activities, etc. You can change settings, add labels, archive items, print and export, copy board, and so on.



Chapter 11. User Profile

It contains the personal information of the user who holds the account.

The user profile icon is displayed at the top-right corner on your account. Clicking on it, you can,

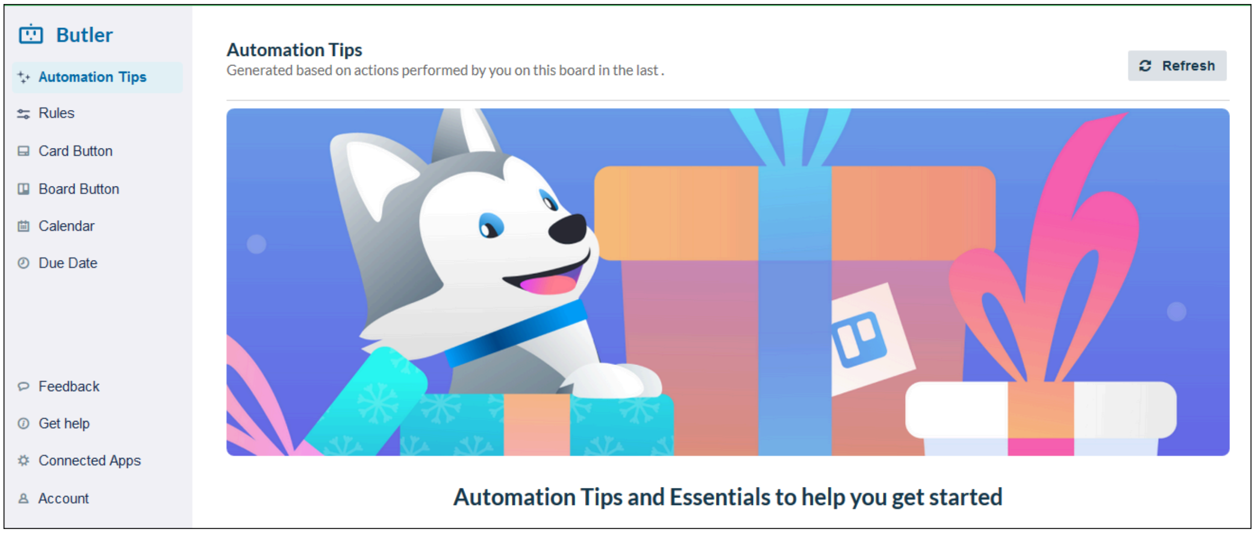
- Manage your personal information
- View all the activities done so far in your Trello account
- View the list of cards and settings of your account.

The **Help** option available under the User Profile provides the context-sensitive help. Click on the **Shortcuts** option to view the list of shortcuts supporting to the Trello application, while **Logout** will take you out of the Trello account.

Chapter 12. Butler

It is used to automate the process as it reacts automatically based on configuration.

Butler automatically reacts to your actions and helps in minimizing number of clicks required to perform multiple tasks.



There are five types of butler commands:

- **Rules –** It is used to setup rules by choosing a trigger and action for your command. The butler automatically performs a certain action when the defined condition is met.
- **Card Button –** A card button is accessed from the card back and it performs an action which is specific to the card. The card button triggers an action on act of clicking it.
- **Board Button –** A board button is accessed from the top of the board to perform certain actions specified in the list.
- **Calendar –** It is used to schedule commands for tasks to be performed on recurring basis. You select a time and action to run a scheduled command.
- **Due Date –** The Due Date command triggers an action when date matches with the time defined. It is not retroactive.