IT Business Management

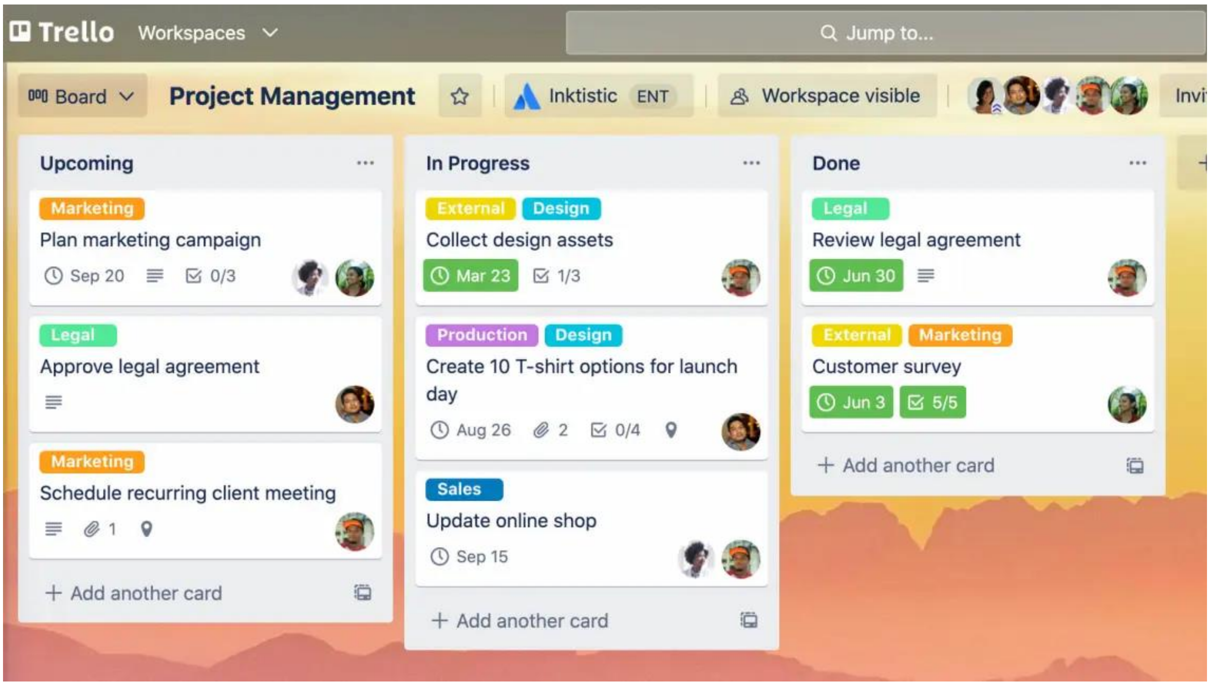
Lab 1

Project Management – Creating a project diary– Trello

- Creating a project and linking a team together
- Create an account with Trello

Learn Trello board basics

Getting started with Trello is easy, in this chapter you will learn about the fundamental components of Trello, boards, lists, cards, and more.



Trello is the visual work management tool that empowers teams to ideate, plan, manage, and celebrate their work together in a collaborative, productive, and organized way.

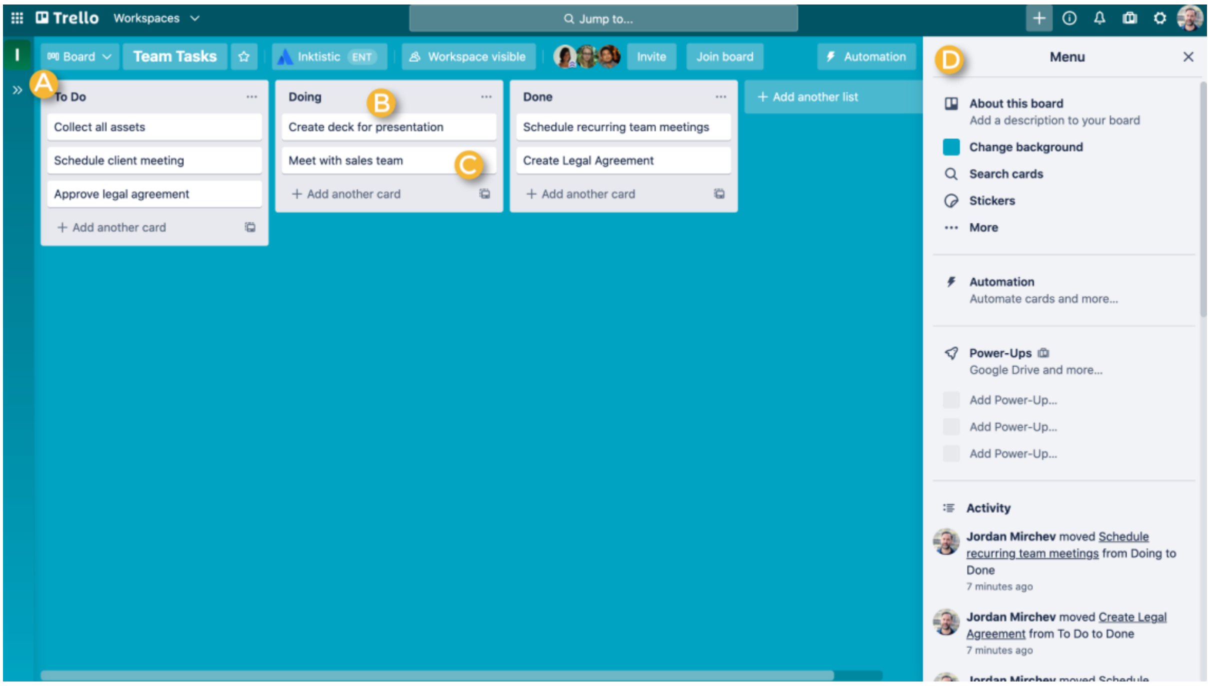
Whether you and your team are starting something new or trying to get more organized with your existing work, Trello adapts to any project. It helps you simplify and standardize your team's work process in an intuitive way.

Trello is user-friendly, yet still able to handle your team's most robust projects.

This is a quick overview of the things you need to know when you are just getting started with your first project on Trello.

What is a board?

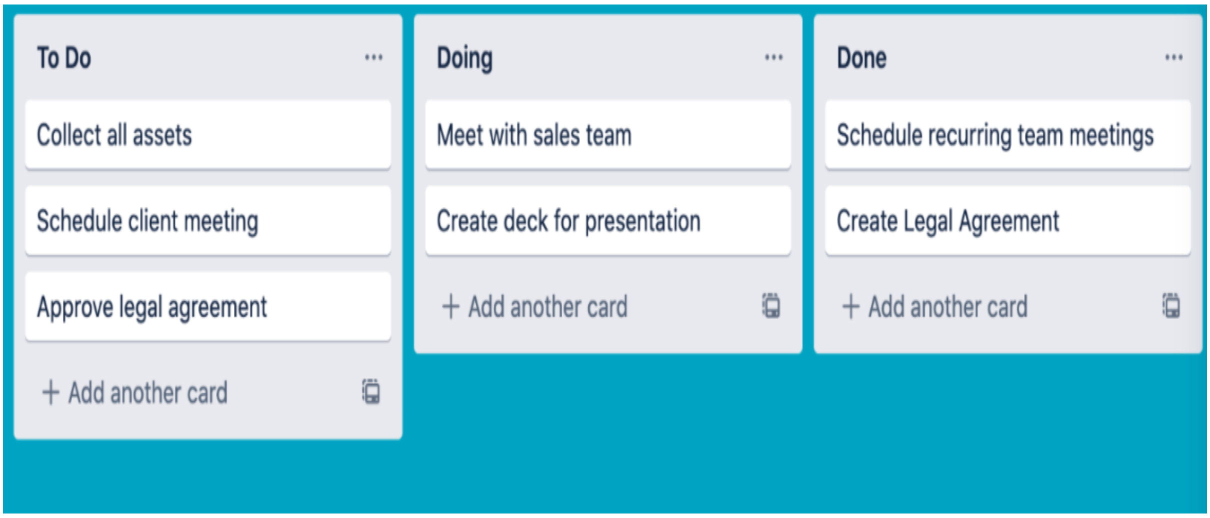
A board (A) represents a place to keep track of information — often for large projects, teams, or workflows. Whether you are launching a new website, tracking sales, or planning a project, a Trello board is the place to organize tasks for each group member, all the little details, and most importantly—collaborate with your team.



What is a list?

Lists (B) keep cards, or specific tasks or pieces of information, organized in their various stages of progress. Lists can be used to create a workflow where cards are moved across each step in the process from start to finish, or simply act as a place to keep track of ideas and information.

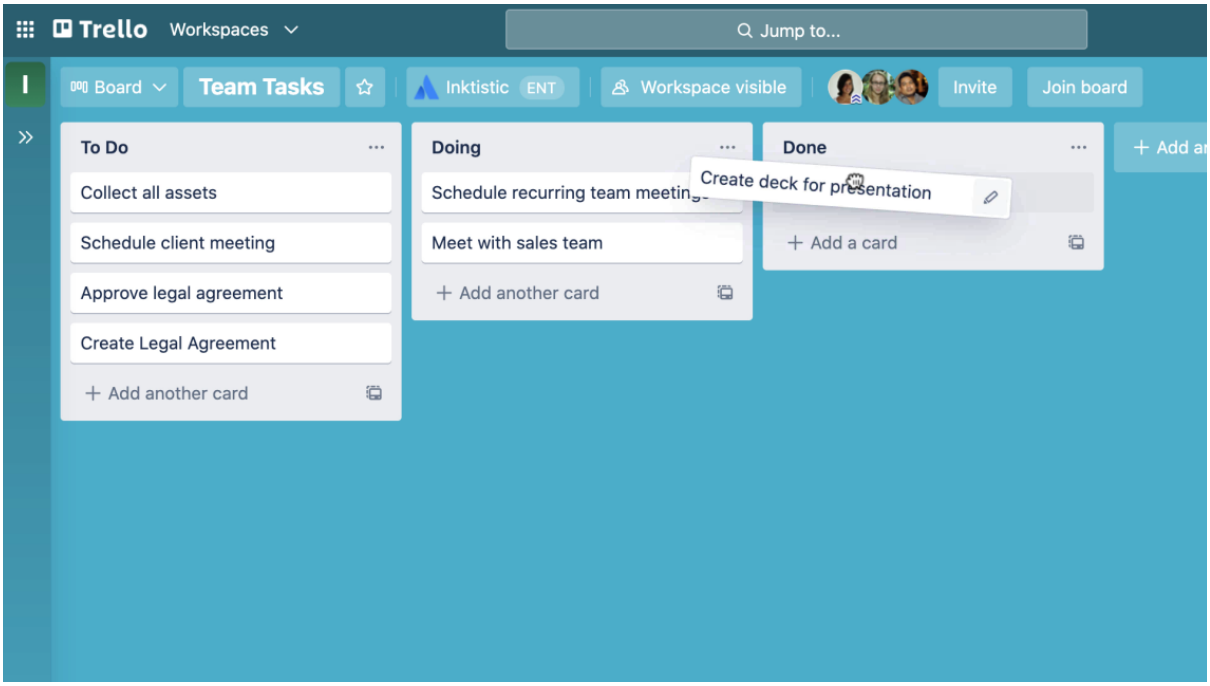
There's no limit to the number of lists you can add to a board, and they can be arranged and titled however you'd like.



What is a card?

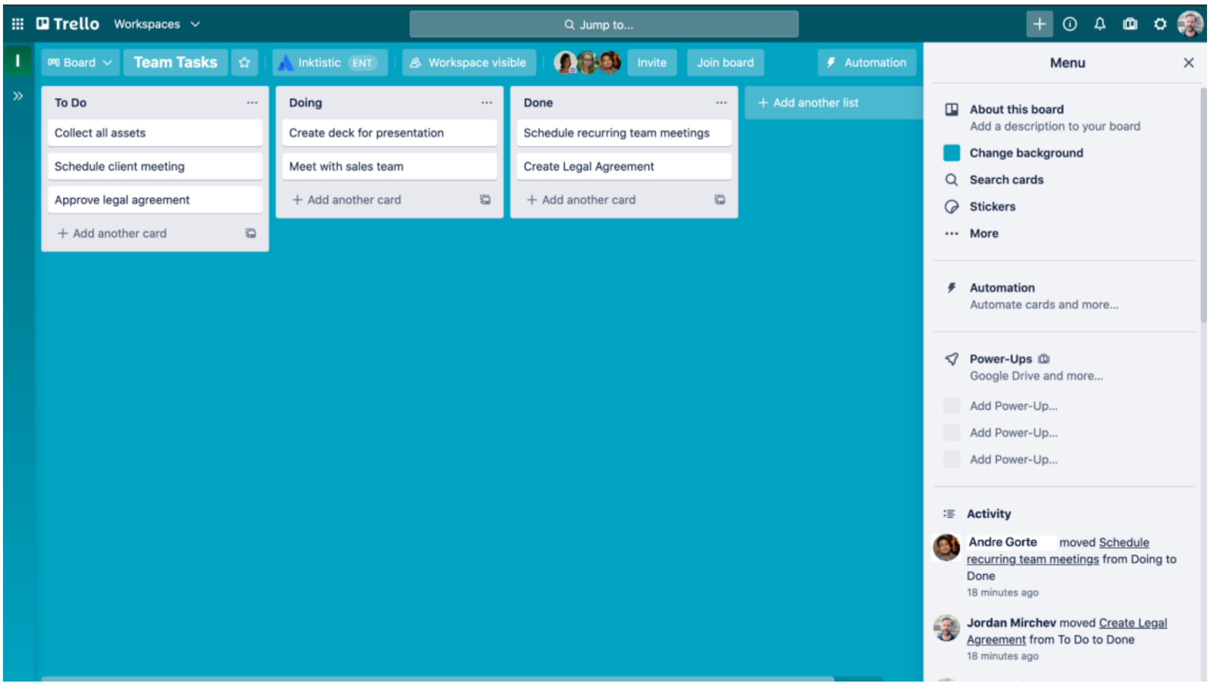
The smallest, but most detailed unit of a board is a card (C). Cards are used to represent tasks and ideas. A card can be something that needs to get done, like a blog post to be written, or something that needs to be remembered, like company vacation policies. Just click “Add a card…” at the bottom of any list to create a new card, and give it a name like “Hire a new marketing manager” or “Write a blog post.”

Cards can be customized to hold a wide variety of useful information by clicking on them. Drag and drop cards across lists to show progress. There’s no limit to the number of cards you can add to a board.



What is the board menu?

On the right side of your Trello board is the menu (D)—the mission control center for your board. The menu is where you manage members' board permissions, control settings, search cards, enable Power-Ups, and create automations. You can also see all of the activity that has taken place on a board in the menu's activity feed. Take some time to check out everything the menu has to offer!!



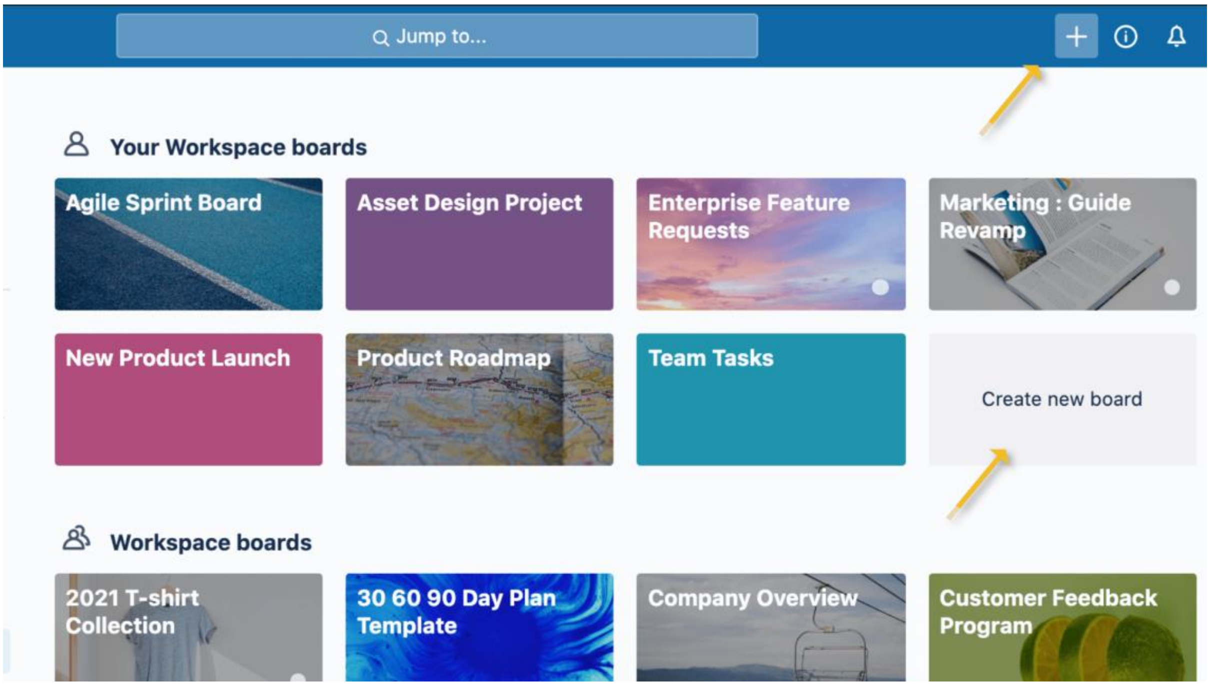
This week's work -- **Create your first project**

Trello is flexible and fast enough to manage any sized project from start to finish. Learn how to build your first board and start moving work forward with your projects – you can create multiple projects here this semester.

Create a board

Structuring a project with all the members, ideas, tasks, and due dates and optimizing it for team collaboration can be overwhelming. Thankfully, you can get a fresh start with a Trello board where you can organize everything to meet your needs and be successful.

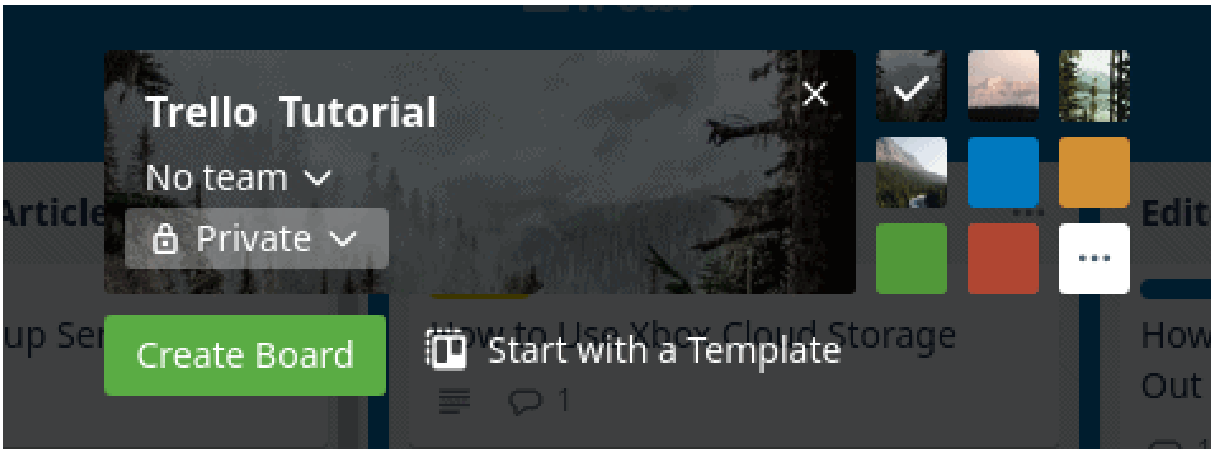
- From the team's Workspace tab, click "Create new board" or click the plus button (+) in the Trello header directly to the left of your name, and select "Create Board".
- Name the board to represent whatever you are working on, from organizing an event or managing a blog, to tracking sales leads or launching a new product.



Your project data and information are your most valuable assets. As you work through creating a new Trello board, you will have options for adjusting your privacy settings.

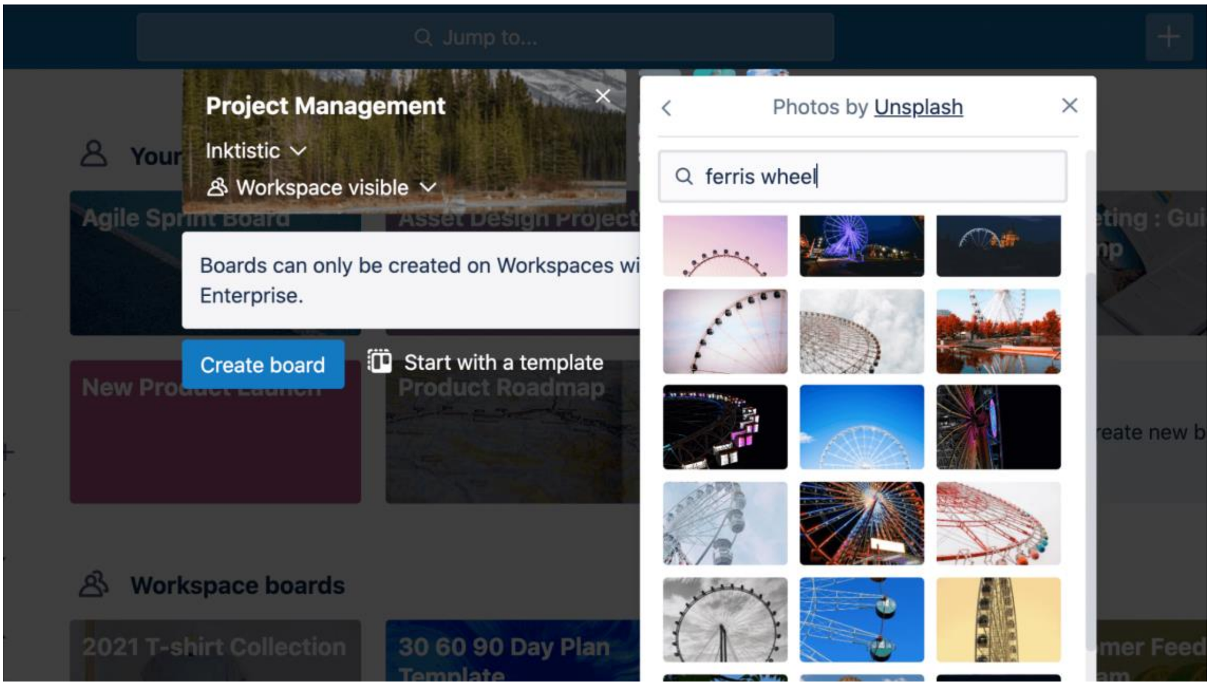
- When you are creating a board, the default setting is 'Workspace Visible' which means any members of that Workspace can view, join, and edit cards.
- If you change your settings to **Private**, only members of that specific board can see it. Typically, you want to default to Private if you are working on a more restrictive project and do not want other team members to access it. It is great for 1:1 boards, personal to do'to-do's or boards shared with customers.

- **Public** boards allow anyone with the link to the board to see it. Public boards are ranked on search engines such as Google, meaning that any information on this specific board will be accessible to anyone on the internet. This setting can be used for a public project or for product roadmap that is open to public feedback. Just like other board settings, you can granularly choose who can comment, add or remove members, and edit and join the board.



Customize your board

No two workflows are alike, so why not give each board a unique look and feel? In the spirit of fun and flexibility, we let you customize your board background to reflect your team’s unique personality.

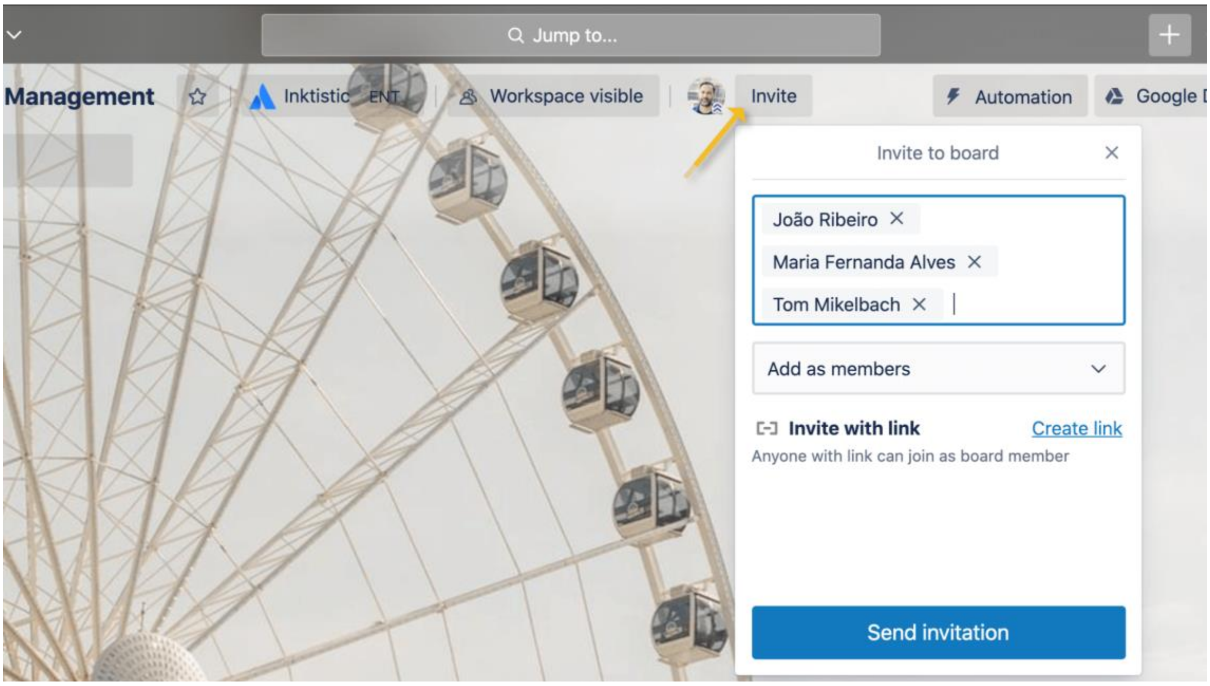


You can pick one of our basic colors, upload your own personal image*, or pick a picture from Unsplash’s huge library of photos for beautiful and unique board backgrounds. You can always change a board background at any time from the board’s menu.

Start collaborating

Whether a member is in charge of a project or only checks in occasionally for project status updates, ensuring all team members are on the same page results in a better project collaboration experience.

Invite members to the board so that they can be assigned to tasks and collaborate on the board.



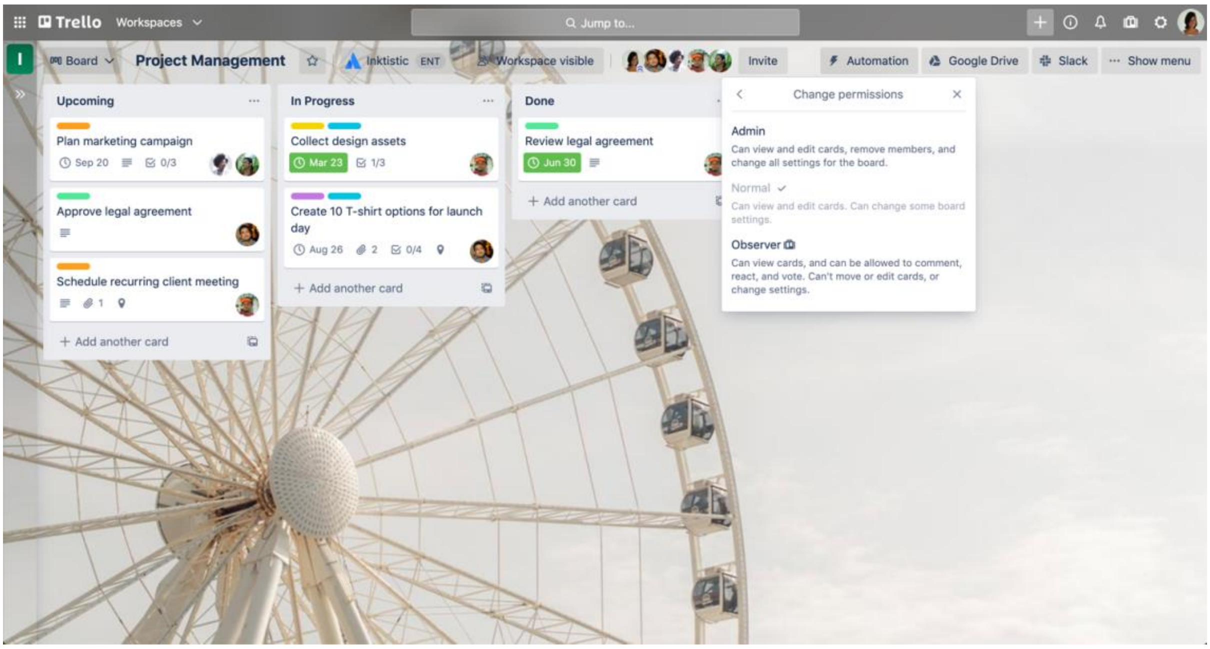
Set member permissions

Set member permissions to define roles transparently. Member permissions gives you granular control to give the right access to the right person. Become familiar with the following user settings to make sure the right information can be controlled by the right people:

Normal: can view and edit cards, they can also edit some board permissions depending on what settings you put together. Great for workspace members actively working on a project.

Admin: can view and edit cards, remove members and change all the settings of the board. Great for project leaders or managers who have full control over the project.

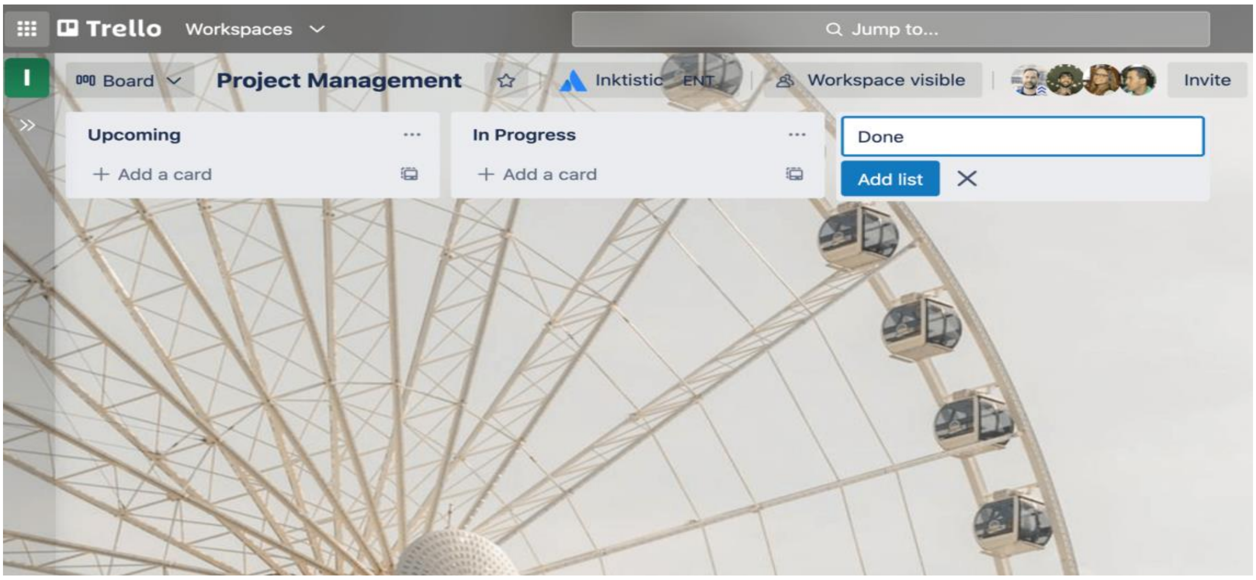
Observer*: can access content displayed on a board, they can't edit cards but you can allow them to comment, emoji react and engage to the level you define with the board. Great for boards you want to inform people on such as clients, managers, third party, etc



Build a workflow

Lists in Trello help you organize your cards by status. They can represent different things like a collection of ideas or tasks within a larger project. However, whether it’s basic Kanban, a sales pipeline, a marketing calendar, or robust project management, what matters most is establishing a workflow for the way your team works

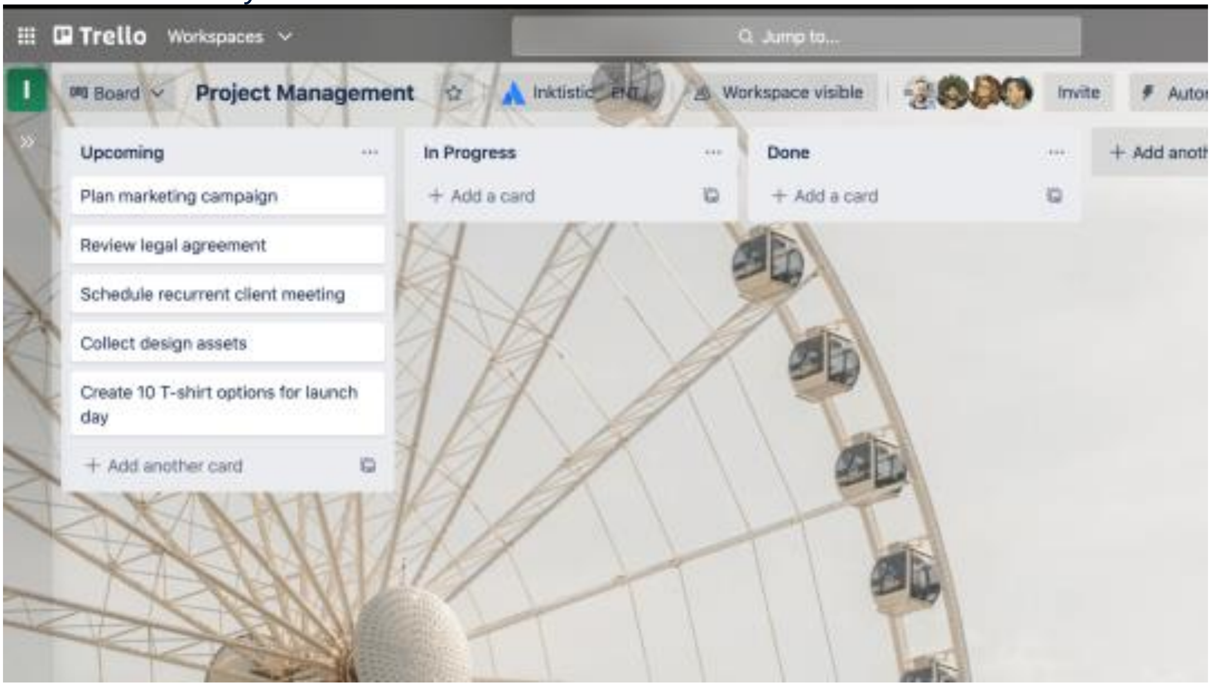
1. Click "Add a list" to add your first list to your board and title it to represent the stage or information that it will hold. List names can be as simple as steps like “To Do,” “Doing,” and “Done” or as detailed as needed for the work you are doing. Remember: Trello is truly customizable to your unique needs so just go ahead and name your lists anything you like!
2. Add as many lists to your board as you need to build out a workflow.



Add tasks and to-dos

As a fundamental unit of a board, cards are used to represent tasks and ideas. It can be used for something that needs to get done like a customer support issue, a new design, a blog post, or something project-related that you need to be reminded of.

Cards can be customized to hold a wide variety of useful information by clicking on them. Drag and drop cards across lists to show progress. There's no limit to the number of cards you can add to a board.



1. Add cards for each task that needs to be completed by clicking "Add A Card" in the first list. Keep card titles short to make it easier to scan and see the status of each card on the board.

2. So that everyone has a clear understanding of what needs to get done, click on cards to add more information such as:

- Descriptions
- Due dates
- Members
- Checklists
- Attachments
- Comments
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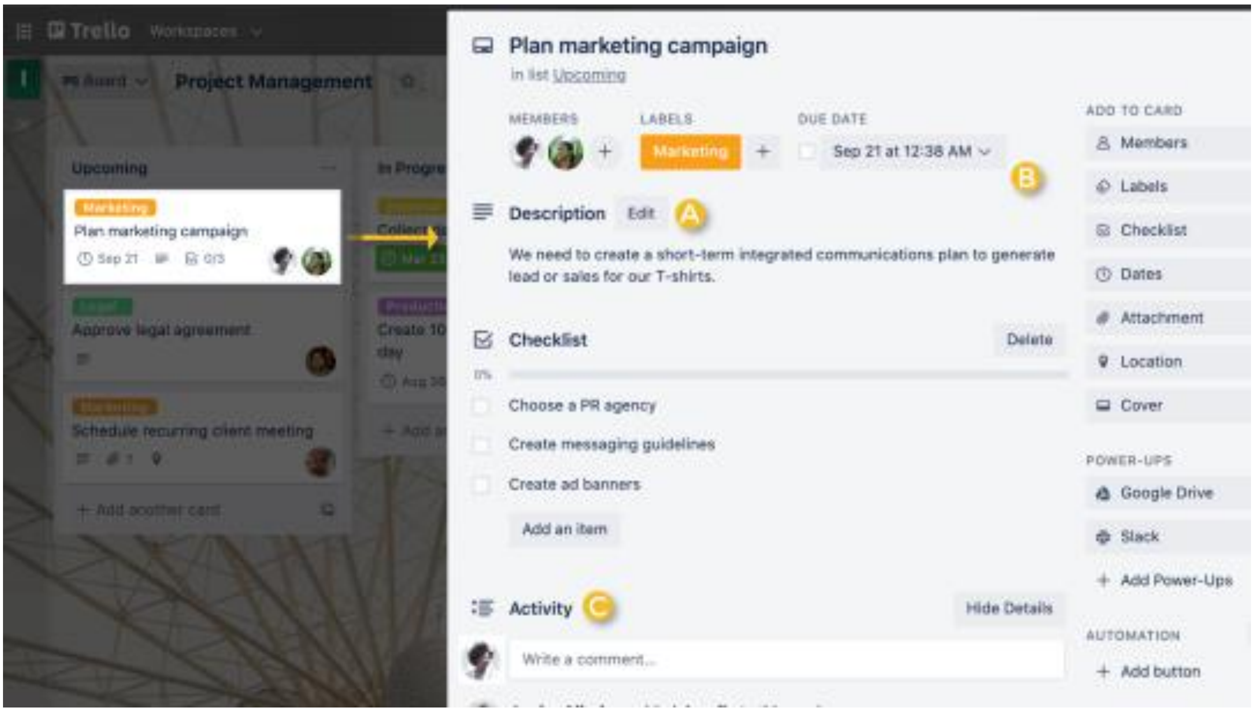
Get Specific On The Card Back

As mentioned earlier, you can click on a card to expand it and add and access more details. This is the “card back” and it is where you can get more specific with your information.



It has three main sections worth getting to know:

A. Card Descriptions: When your team is communicating daily, you need the ability to add and understand context. With the right information, you can preface communication and help prevent any miscommunication related to your project. For members who aren’t managing the board daily but need to check in regularly, this can be very helpful.

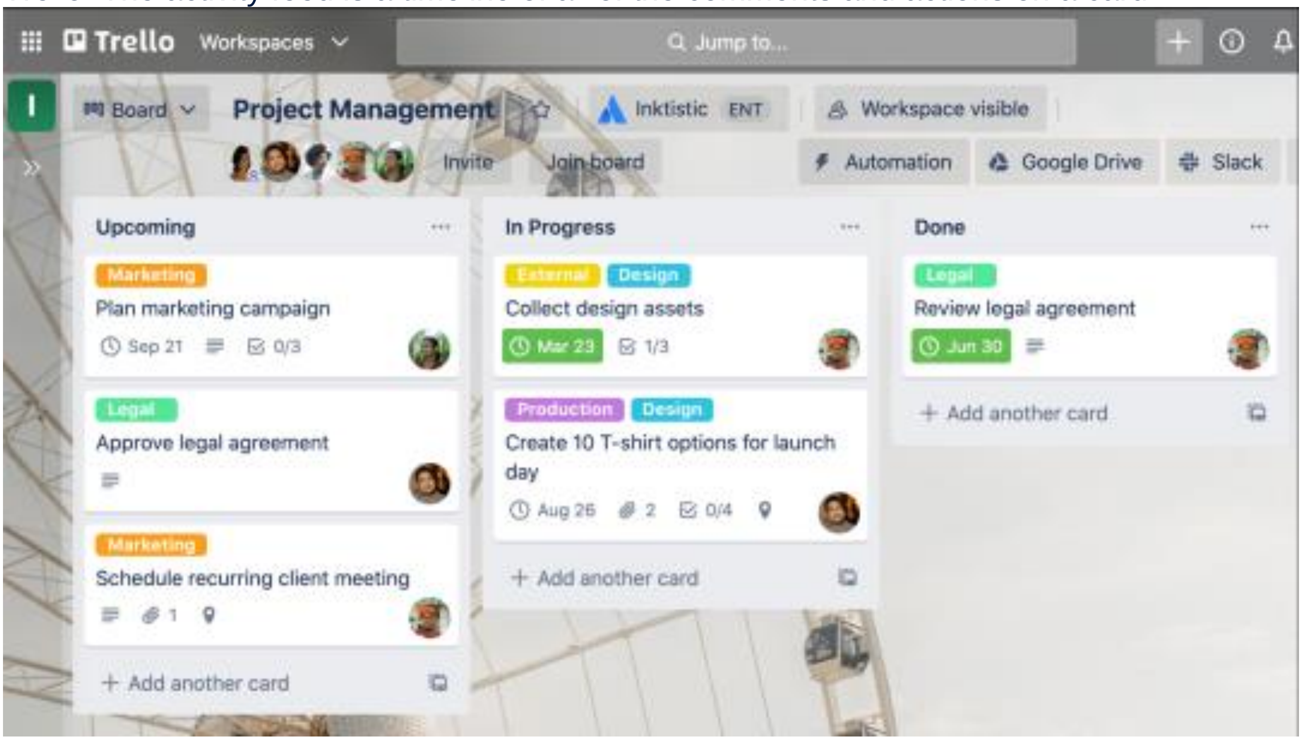
In the description field you can add more specific information about your card such as links to websites or step by step instructions. To add details to your card click “Edit the description” at the top of the card back. You can even format your text with Markdown.

B. Add: The “Add” section provides you with more tools for the back of a card.

- Add Members to cards to assign people to tasks, and easily see who is doing what and what still needs to get done.
- Add Checklists to cards that require subtasks or have multiple steps to make sure nothing falls through the cracks. You can even copy checklists from other cards on the board.
- Add a date to cards to track deadlines, and card members will receive a notification 24 hours before it's due. From the date menu, you can pick a start date and a due date to keep track of when projects and tasks begin and end. Once the tasks are completed, dates can be marked as done.
- **Add Attachments from both your computer and many cloud storage services like Dropbox, Google Drive, Box, and OneDrive**.

Set reminders at a granular level by choosing specifically when you want to be reminded when a date is due!!

C. Comments and Activity: Comments can be added to cards when communicating and collaborating with team members, like giving feedback or updates. @ mention, a member of your board or team in a comment and they will receive a notification in Trello. The activity feed is a timeline of all of the comments and actions on a card.



Now you can see how Trello keeps everyone on the same page with all of the information in one place. You are ready to set your whole team up for success!

We will create spaces and update spaces in Trello as the semester moves and you can adjust these for each module where you have ongoing CA and especially teamwork.