

## **Collaborating online in Trello**

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# Planning your projects with Trello

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Trello is a virtual, interactive board you can use for personal and business projects, alone and in teams, in private and shared mode.

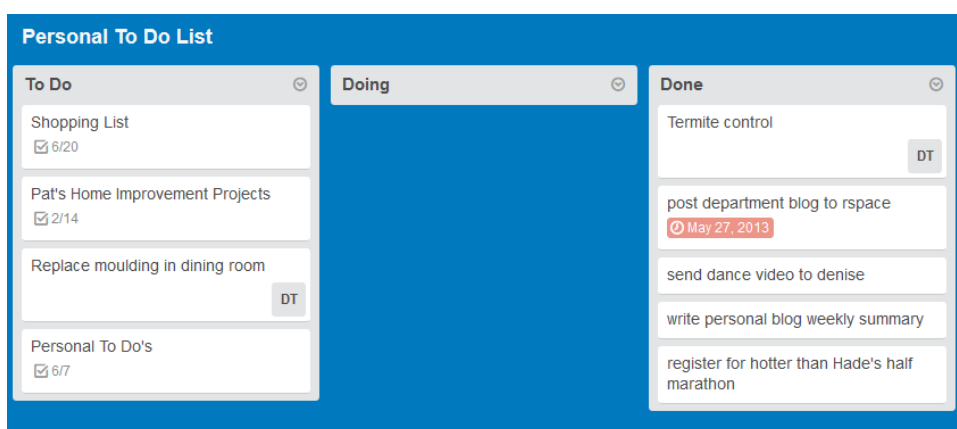
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## Related Links

[More inspiring boards](#)

## Keeping to-do lists

Keep track of your chores and errands, of reading lists, of travel arrangements, etc. on **To Do** boards.



(source: <https://trello.com/b/keLKBhex/personal-to-do-list>)

- Set the list to Private, if you want to work on it alone and hide it even from your groups.
- Add board members (family, friends, students or colleagues), assign them tasks and collaborate on an Organization list.
- Let the community participate, by keeping a Public list.

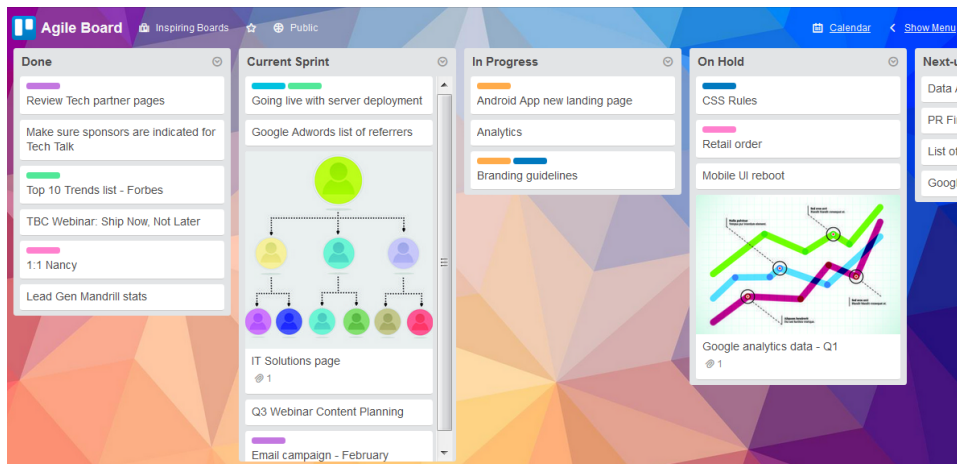
## Related Links

[Creating a user account](#) on page 7

[Creating a board](#) on page 9

## Agile boards

When working with agile teams, create an **Agile Board** to suit your workflow.



(source: <https://trello.com/b/DnZvFigA/agile-board>)

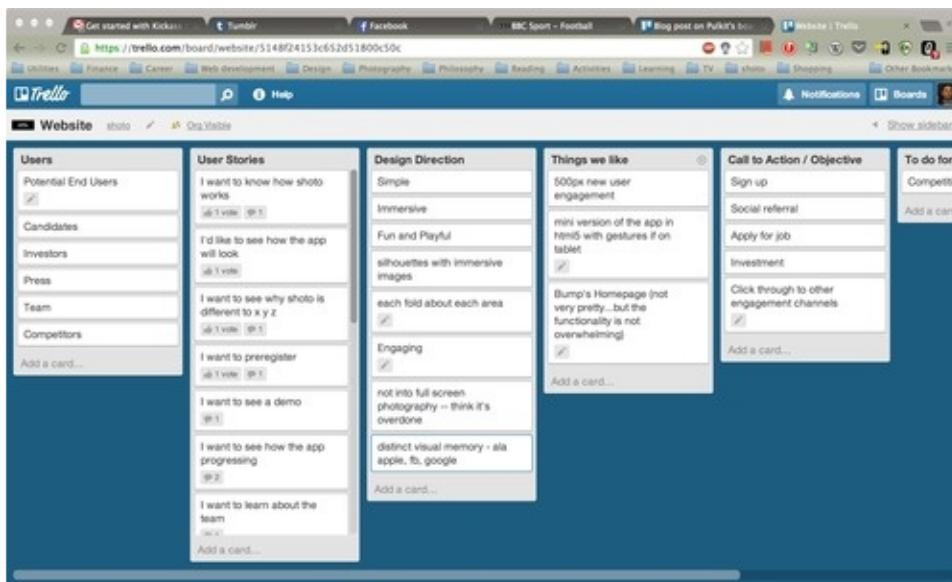
For example, create lists for Backlog, Current Sprint, In Progress, On Hold, Done, etc.

### Related Links

[Creating a business organization](#) on page 9

## Brainstorming

Trello can be used as an interactive brainstorming board, for storing ideas, grouping and prioritizing them.



(source: <http://www.quora.com>)

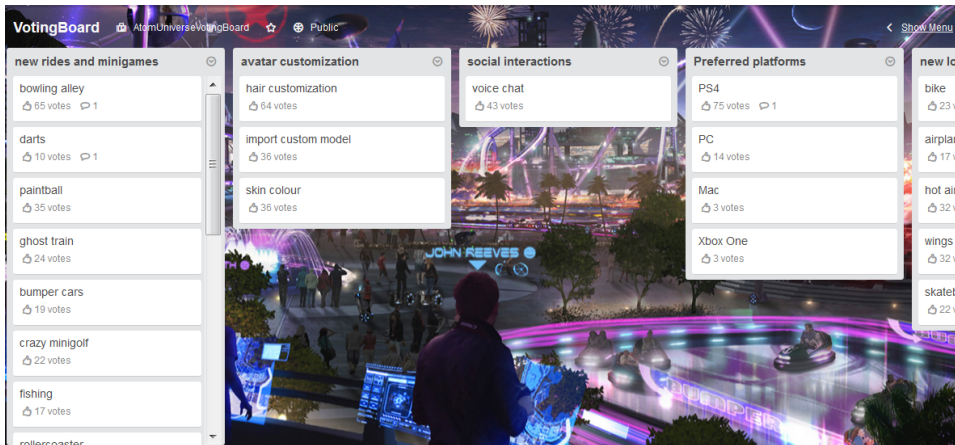
Start by creating cards or lists for each idea, then do card-sorting to create more relevant lists, voting, labeling, etc.

### Related Links

[Creating a personal organization](#) on page 7

## Voting

Allow members to vote on cards and prioritize tasks and ideas.

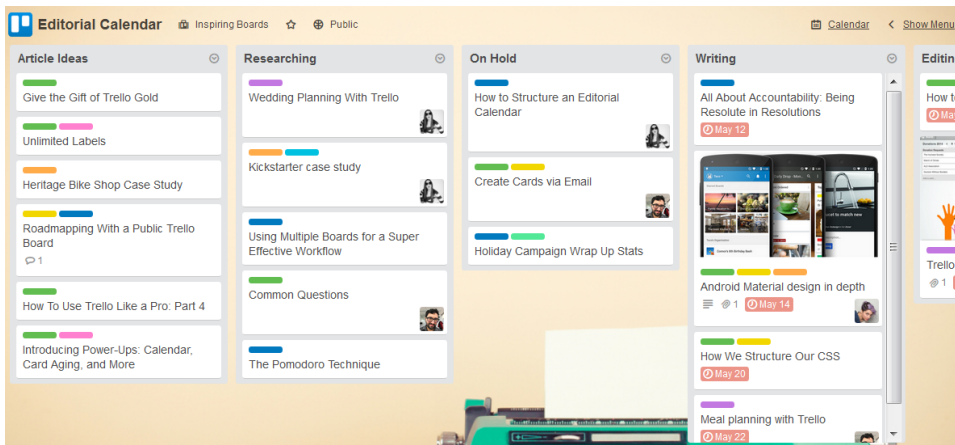


(source: <https://trello.com/b/4WrmVAmH/votingboard>)

Use voting to process brainstorming results, to organize events, to sort lists, to make decisions, etc.

## Writing drafts

When researching and writing content, create a planning board.



(source: <https://trello.com/b/mo04wOm4/editorial-calendar>)

Trello is very useful for lesson plans, workshop plans, editorial calendars, journals, project research, etc.

# Starting a Trello board

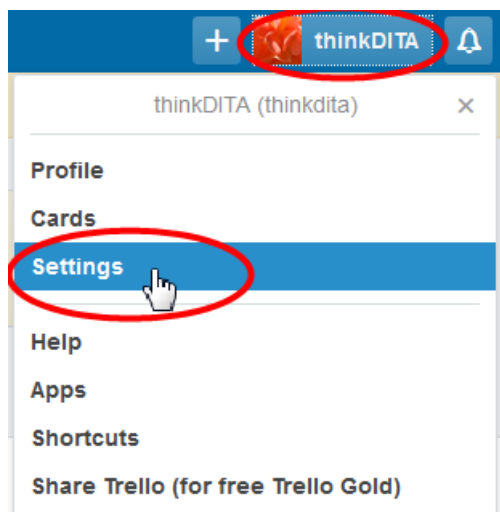
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To start using Trello, sign up and create your boards and organizations, or join other organizations if you want to collaborate on their boards.

You can use Trello on PC and mobile devices. Most browsers and operating systems are supported.

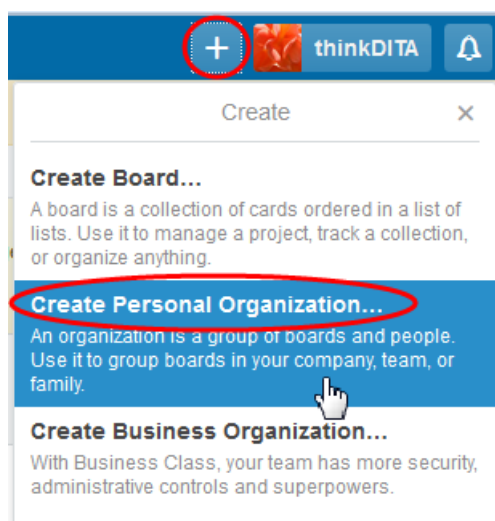
## Creating a user account

1. To create a user account in Trello:
  - If you have an email invitation, click the hyperlink (**View Organization**) in the email message, then when the organization page opens in your browser, click **Join Organization**.
  - Go to <https://trello.com/> and click **Sign Up**.
2. Fill in the **Name**, **Email** and **Password**, and click **Create New Account**.  
You'll see the **Welcome Board** and a message asking you to confirm your email address.
3. Open your email account and click the confirmation link **Verify Address** in the email message.
4. Log in to Trello again if necessary, and click the **Welcome Board**.  
Boards are organized in lists and each list contains cards. Read the cards in the **Basics**, **Intermediate** and **Advanced** lists, which form a quick guide.
5. To set up your account details and notifications, click your user name in the top menu bar and click **Settings**.



## Creating a personal organization

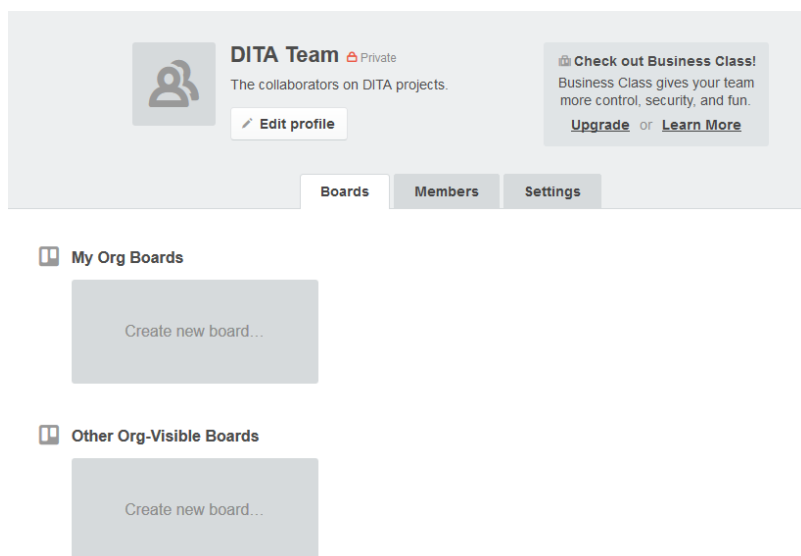
1. To start collaborating with family, friends, club, project team, etc. click the plus sign next to the user name on the top menu bar and select **Create Personal Organization**.



If the group already has created an organization, they can invite you to join. Tell them your Trello username.

2. Fill in the **Name** of your new organization and a **Description**, then click **Create**.

The organization page opens.



Under **My Org Boards**, you'll see the boards you create for this organization, while under **Other Org-Visible Boards** you'll see boards created by the other organization members.

3. To change the logo and description of the organization, click **Edit profile**.
4. To change the **Visibility** of the organization, click **Settings**.
  - **Private** means the boards are not indexed, nor visible to anyone outside the organization.
  - **Public** means the boards are visible to anyone with a link to them and they are indexed by search engines. However, only the organization members can create and edit the boards.

Further settings (restrictions and security) are enabled if you upgrade to business class.

#### Related Links

[Brainstorming](#) on page 5



Trello can be used as an interactive brainstorming board, for storing ideas, grouping and prioritizing them.

## Creating a business organization

If you upgrade to Business Class, you can create business organizations and benefit from advanced security and privileges.

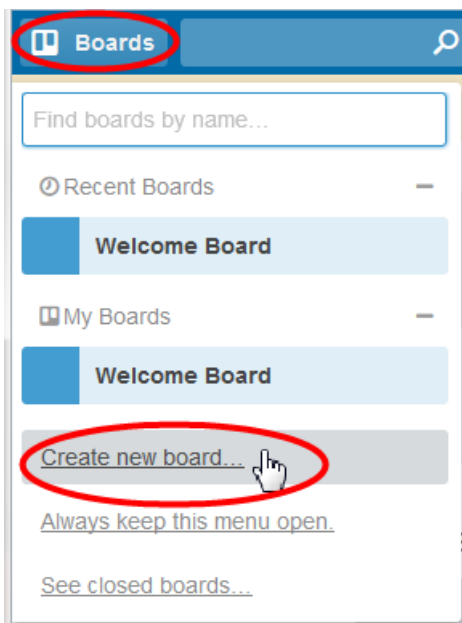
### Related Links

[Agile boards](#) on page 5

When working with agile teams, create an **Agile Board** to suit your workflow.

## Creating a board

1. To create a new board, click **Boards** on the top menu bar, then click **Create new board**.



You can also start new boards directly from the organization page.

2. In the **Create Board** dialog:
  - Type a **Title** for the board.
  - If you want to share the board with the members of an organization, select it from **Organization**.
  - To set the visibility of the board, click **Change**.
    - **Private** means only you and members you add to the board have access to it.
    - **Organization** (if you enabled it) means only members of the organization can access the board (Org Visible).
    - **Public** means the board is visible to anyone with a link to it and indexed by search engines.
3. Click **Create**.  
Your new board is displayed and you can start adding lists and cards to it, and eventually adding members.

## Inviting participants

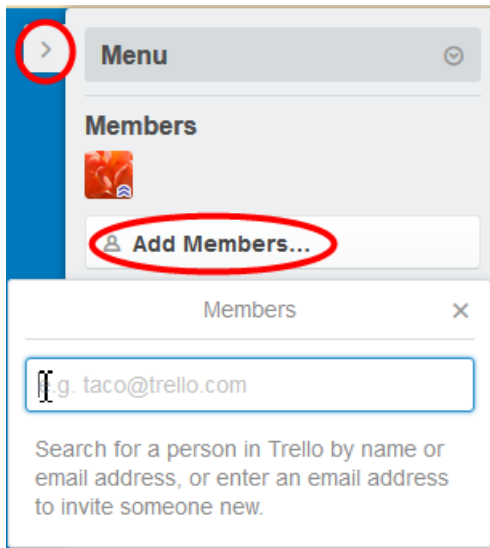
You can add (invite) members to join an organization or to join a board.

- To add members to an organization, open the organization page and click **Members > Add Members**.

- If the new members already have a Trello account, you can search them by their user name or email address. They are added directly to your organization and receive an email notification.
- If the new members do not have a Trello account, type their email address and you'll be asked for a full name, then click **Send** to invite them by email.

By default, the new members are added with **Normal** permissions (can view and edit cards, but cannot change settings). If you are an Admin and a new member has to be able to change the organization settings, you can also set them as **Admin**.

- Similarly, to add members to a board, open the organization page and click **Show Menu > Add Members**.

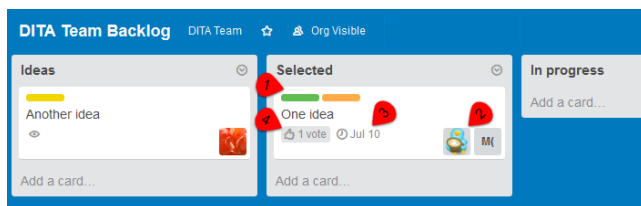


By clicking their avatar, you can change the permissions (Normal or Admin).

The invited members have to join the organization, by clicking the hyperlink in the email message and signing up to Trello.

## Collaborating on the board

Trello displays clues for collaboration directly on cards on the board.



1. Cards are tagged with labels
2. Members are assigned to cards
3. Due dates can be set
4. Members can vote on cards

These features are further integrated with notifications and calendar entries.

## Creating lists on the board

Each board is organized in vertical lists. For example, a **Tasks** board could contain three lists: **To Do**, **Doing**, **Done**.

On a board, click **Add a list**, type the name of the list in the text field and click **Save**.

You can rearrange the lists by drag & drop.

By clicking the arrow in the list title, you can make further changes to a list: copy, move or archive the list or its cards.

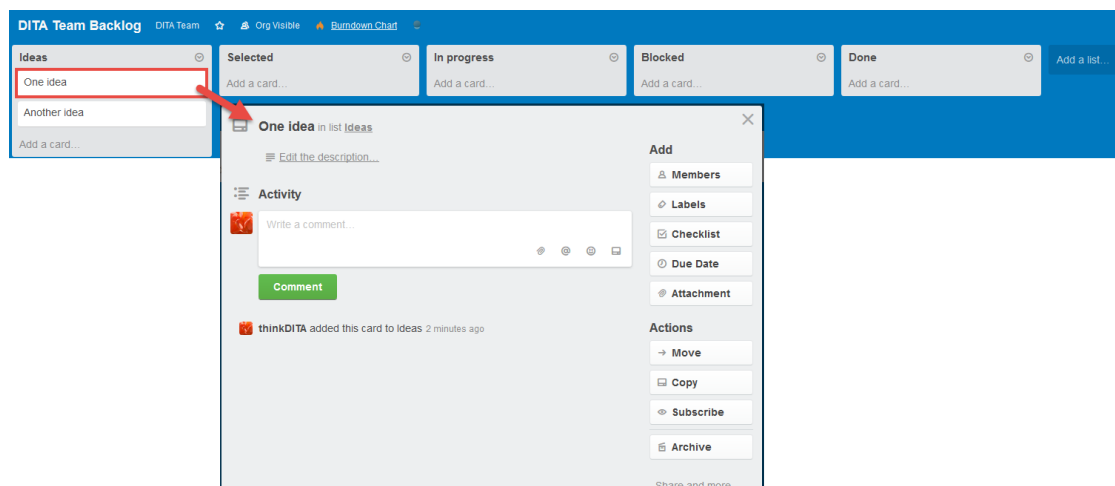
## Creating cards on the board

The lists on a board contain cards, on which you write the content, like for example ideas, tasks, etc.

1. On the bottom of the list, click **Add a card**, type the card title in the text field and press **Add**.

You can rearrange the cards by drag & drop, even between lists.

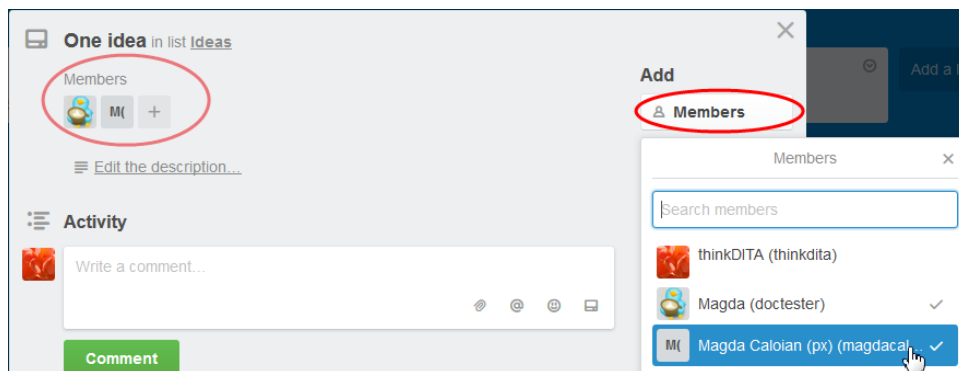
2. By clicking a card, you can edit its content.



## Assigning members to cards

The members have to be assigned to the board first from **Show Menu > Add Members**.

1. Open the card.
2. Click **Members** and click the user name(s) you want to assign to the card.

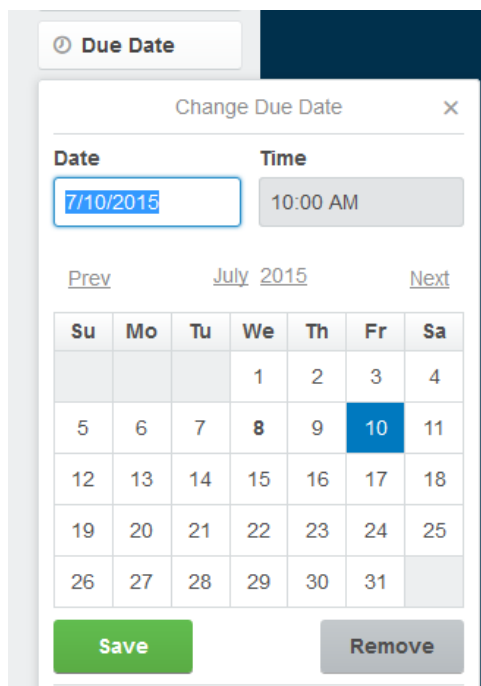


The member avatars are added to the card in the list.

## Setting due dates

The **Calendar** feature has to be enabled for the board: **Show Menu > Power-Ups > Calendar**.

1. Open the card.
2. Click **Due Date** and select the date and the hour for the deadline.

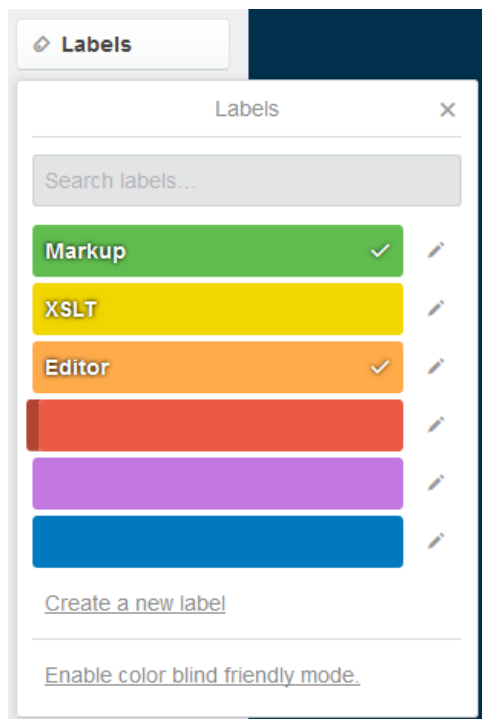


The card is added as event in the **Calendar** on the top menu bar of the board.

## Setting labels

A set of ten colored labels is available for each board and you can give them relevant names.

1. Open the card.
2. Click **Labels** and click one or more labels that you want to add to the card.



Thin colored lines are added to the card in the list.

## Prioritizing by voting on cards

The **Voting** feature has to be enabled for the board: **Show Menu > Power-Ups > Voting**.

Each member can cast only one vote per card.

To add your vote to a card, open the card and click **Vote**.

The number of votes on the card is incremented.

## **Monitoring Trello boards**

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**Checking activity history**

**Subscribing**

**Creating a calendar**

## **Adding content to cards**

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**Title**

**Description**

**Checklists**

**Attachments**

**Comments**

**Mentions**

## Exporting content from Trello

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**Sharing**

**Printing**

**Exporting**



## **Changing items**

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**Moving items**

**Copying items**

**Archiving items**

**Deleting cards**

**Closing boards**

## Examples of boards

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## Shortcuts and tips

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