Collaborating online in Trello

Contents

Planning your projects with Trello

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

Disclaimer: We are not affiliated, associated, authorized, endorsed by or in any way officially connected to Trello, Inc. (www.trello.com).

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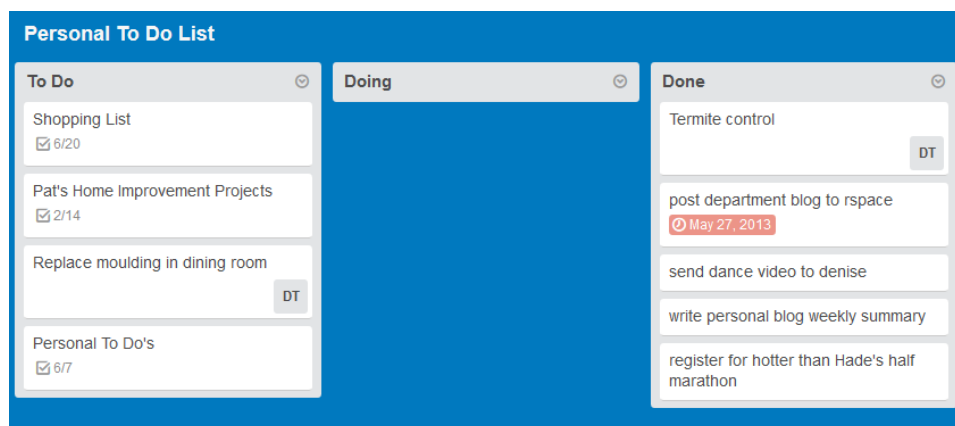
- Set the list to Private, if you want to work on it alone and hide it even from your groups.
- Add board members (family, friends, students or colleagues), assign them tasks and collaborate on an Organization list.
- Let the community participate, by keeping a Public list.

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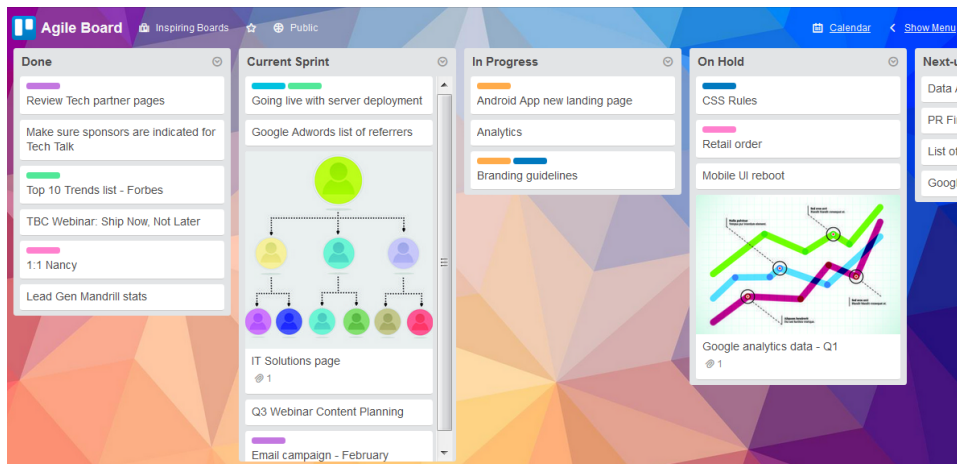
For example, create lists for Backlog, Current Sprint, In Progress, On Hold, Done, etc.

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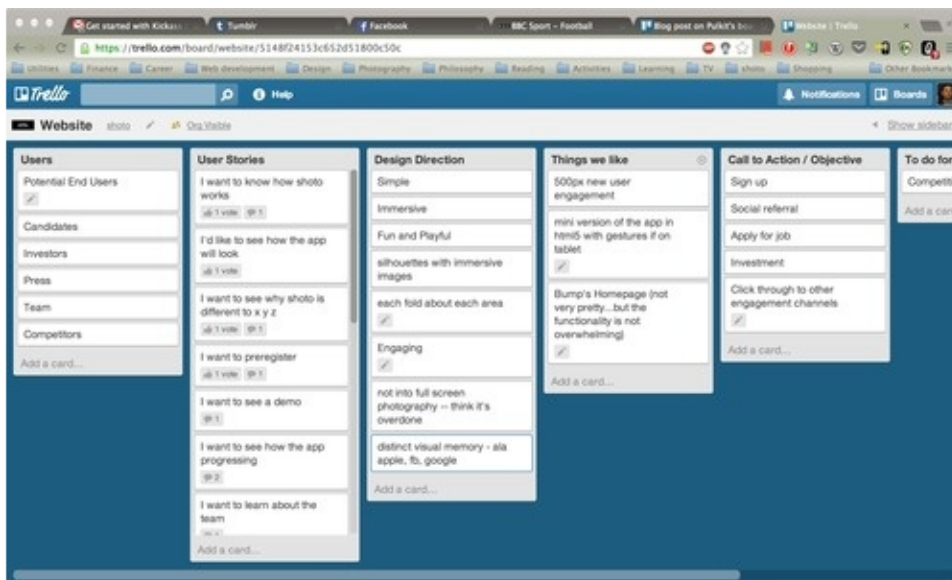
Start by creating cards or lists for each idea, then do card-sorting to create more relevant lists, voting, labeling, etc.

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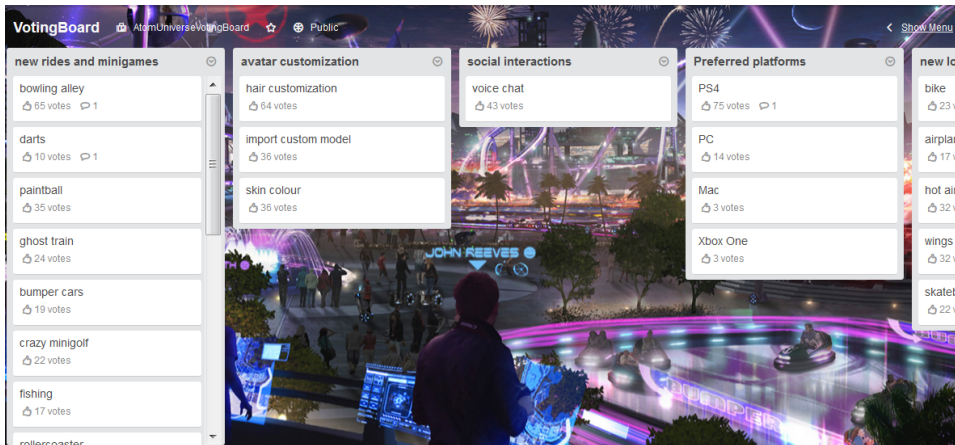
Use voting to process brainstorming results, to organize events, to sort lists, to make decisions, etc.

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

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:

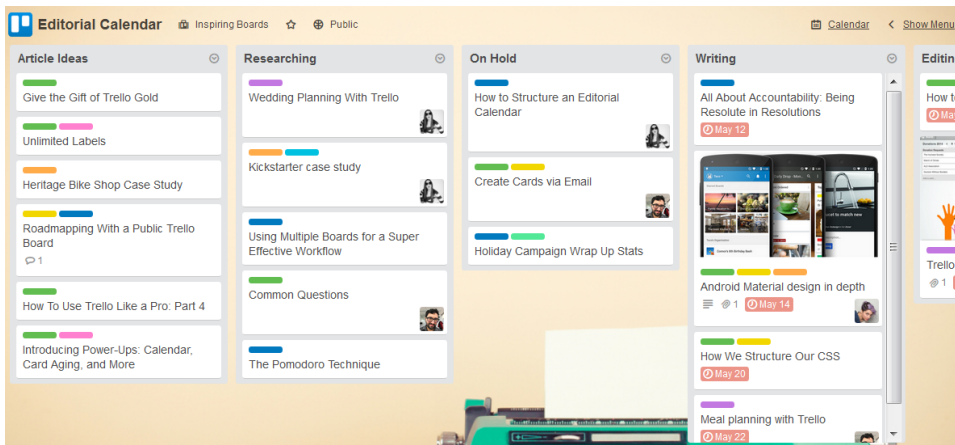   - If you have an email invitation, click the hyperlink (**View Organization**) in the email message, then when the organization page opens in your browser, click **Join Organization**.
   - Go to *https://trello.com/* and click **Sign Up**.

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**.
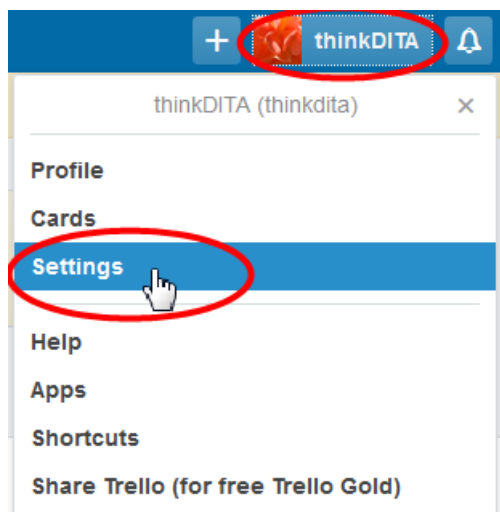
Creating a personal organization

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**.
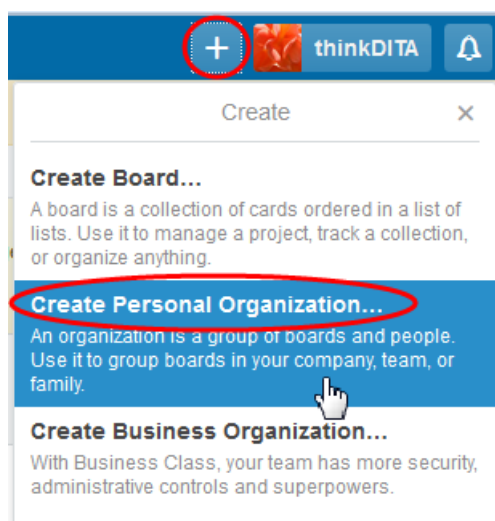
If the group already has created an organization, they can invite you to join. Tell them your Trello username.
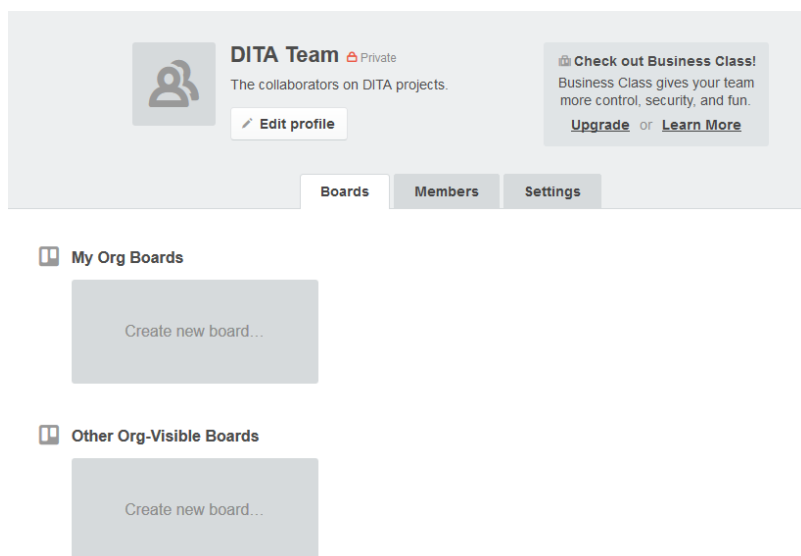
2. Fill in the **Name** of your new organization and a **Description**, then click **Create**.

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.
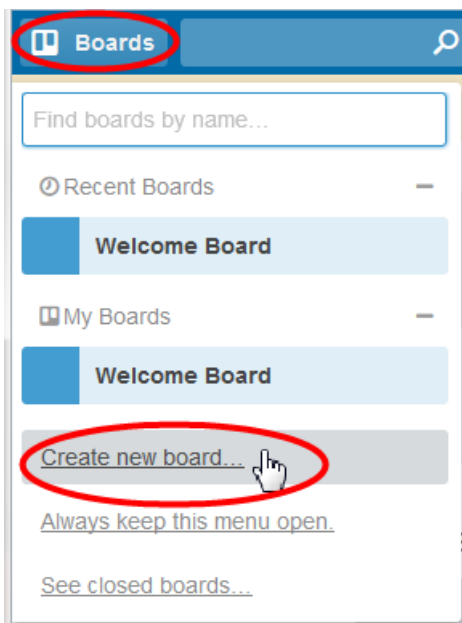
Related Links

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, if you have the required permissions.

- 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**.
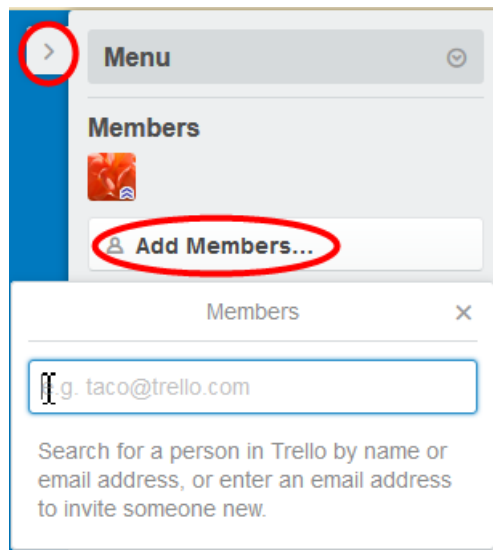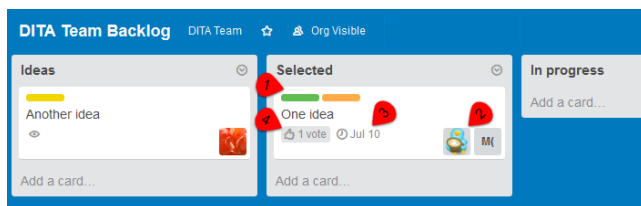

By clicking their avatar, you can change the permissions (Normal or Admin).

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.
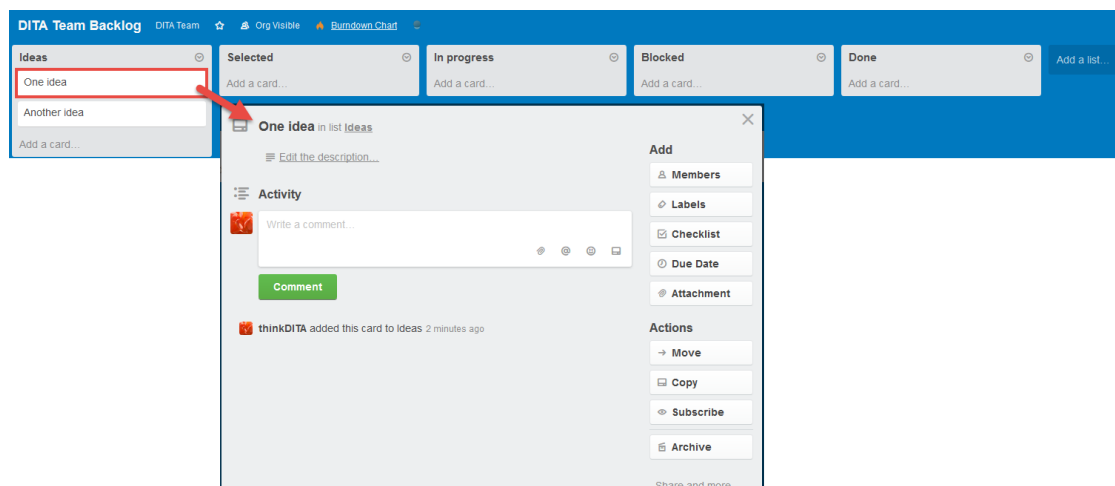
Creating cards on the board

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**.

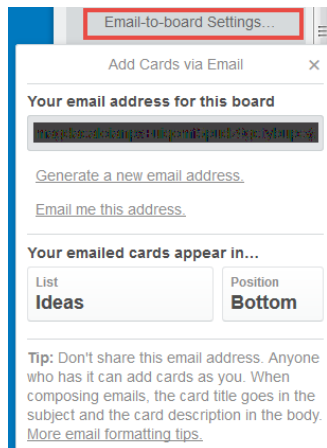   You can rearrange the cards by drag & drop, even between lists.

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

Creating cards by email

Each board member can submit cards to a list on the board by email. Trello creates a user-specific email address for each board.

1. Open the board and go to **Show Menu** > **Menu** > **Email-to-board Settings**.

2. Select the list and the position (**Top** or **Bottom**) for your new cards and click **Email me this address**.
3. Add the board email address to your contacts (there is a vcard attached).
4. When you send a card by email:

   • The subject of the email is the card title
   • The body of the email is the card description
   • Email attachments are card attachments
   • To add labels, add #labelcolor or #labeltag to the email subject
   • To assign members to the card, mention them (@username) in the subject or on a separate line in the body

   It may take a while for the server to upload the new card on Trello.
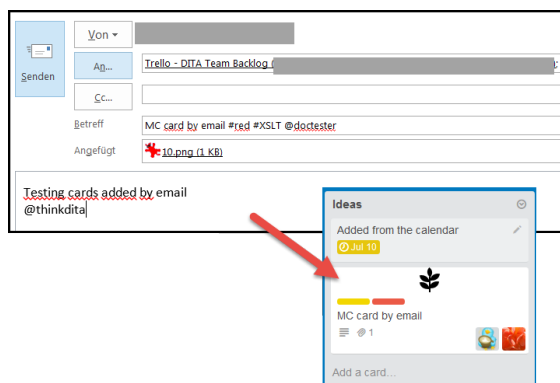
Assigning members to cards

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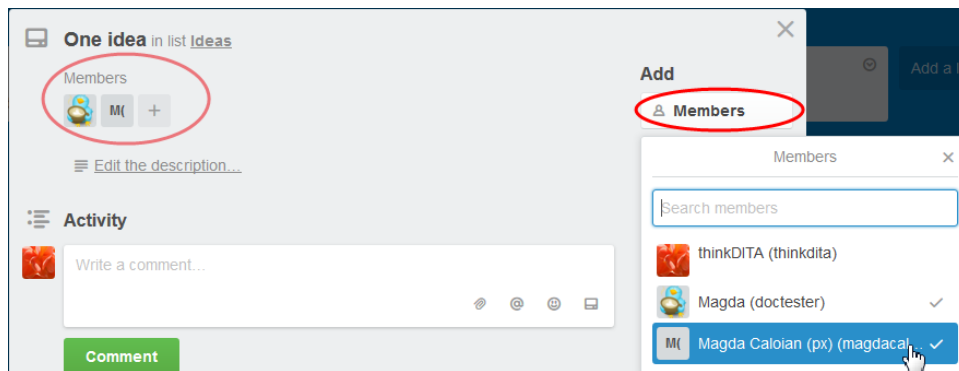
The member avatars are added to the card in the list.

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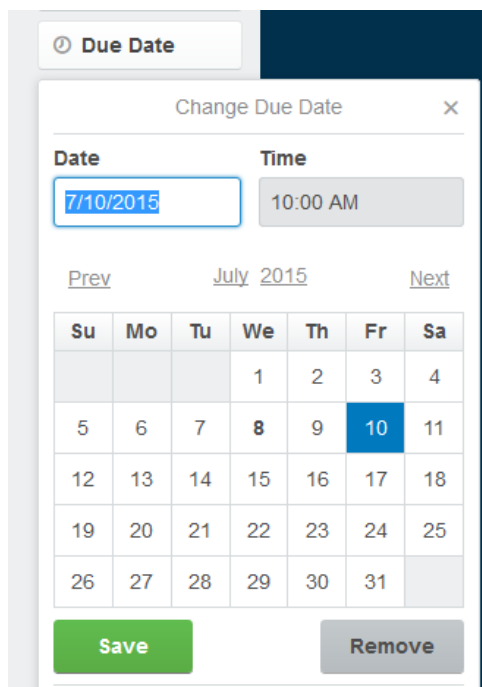
The card is added as event in the **Calendar** on the top menu bar of the board.

Related Links

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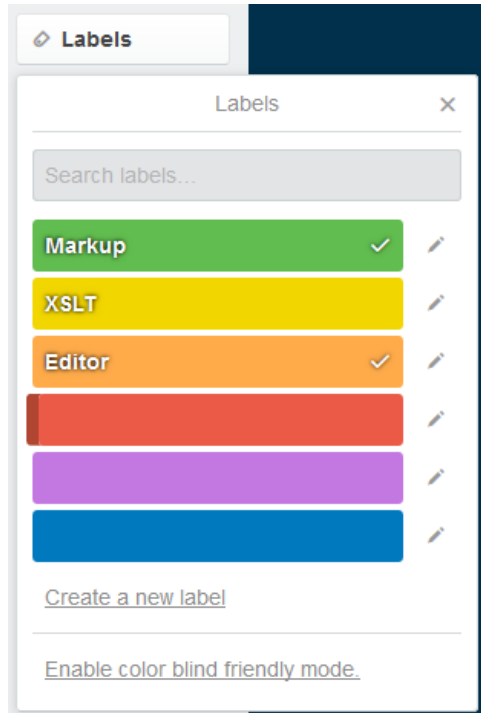
Thin colored lines are added to the card in the list.

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

The Trello boards support your team work through notifications, commenting and calendar features.

Checking activity history

- To see the latest activity on a board, click **Show Menu** on the top menu bar of the board.

  Each user action is logged under `Activity` with a short message and a timestamp. For example:
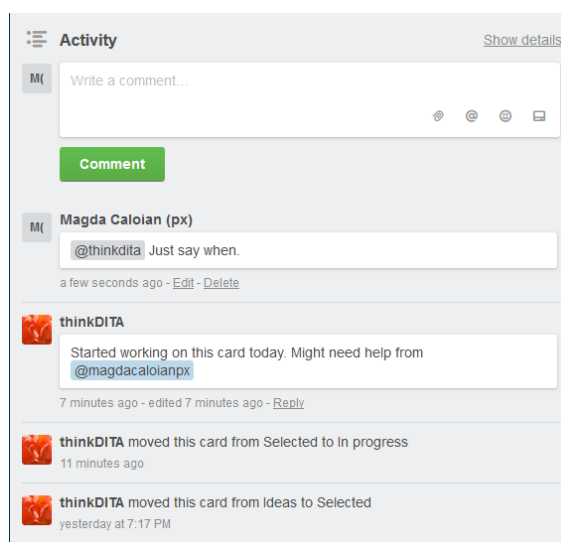
  ```
  Admin added User1 to CardXYZ yesterday at 6:32 PM
  ```

  or

  ```
  User1 added ListABC to this board a few seconds ago
  ```
  .

- To see the activity on a card, open the card.

  The user actions on that card are logged in the same manner as in the board activity.

- Use the commenting feature on the cards, to record your notes and to discuss with the team.

Subscribing

You see an eye-icon 👁 on the cards, lists and boards you are monitoring and you receive email notifications every time something changes on that item.

If you are also using the Trello App, you can see app notifications and badges on your mobile devices.

- Cards: If you want to monitor the activity on a card, open the card and click **Subscribe**.

  If you are assigned to a card, you are automatically subscribed to it.

- Lists: If you want to subscribe to a certain list on a board, click the arrow on the list title bar, then click **Subscribe**.
- Boards: If you want to monitor a board, click **Show Menu** > **Menu** > **Subscribe**.

When you open Trello in the browser or in the app, the icons show if there are new notifications since you last closed Trello.

- browser icon
- Trello banner icon next to your user name
- card icon

Creating a calendar

Only board administrators can enable Power-Up features.

     Warning: Moving cards on the calendar results in changing their due date.

- To activate the calendar feature, go to **Show Menu** > **Menu** > **Power-Ups** and click **Enable** next to the `Calendar` feature.
  The **Calendar** button appears on the board menu bar and you can see it in weekly or monthly view.
- If there are cards with due dates assigned on the board, you can open and edit the cards directly by clicking on them in the calendar.
- To see the icons on cards on the calendar, as you see them on the board, click somewhere in the day space (outside the cards).
- You can add new cards for a certain date by clicking the day in the calendar.
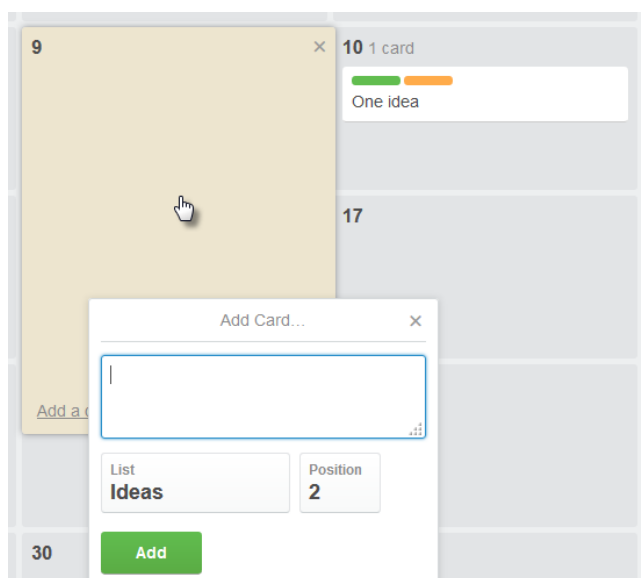
Type the card title, select a list from the board and the position in the list, then click **Add**.

The due date on the new card is automatically set to the day you clicked in the calendar, and the time is by default 12:00 PM. You can click the card and edit the due date and other details.

- Click **Calendar** again, to return to the board view.

Related Links

Exporting iCalendar

Only board administrators can enable Power-Up features.

> **Note:** Third-party applications do not reflect changes on Trello boards in real time.

1. To add the board calendar to your Outlook or to other calendar application, go to **Show Menu** > **Menu** > **Power-Ups** and click the settings icon next to the `Calendar` feature.
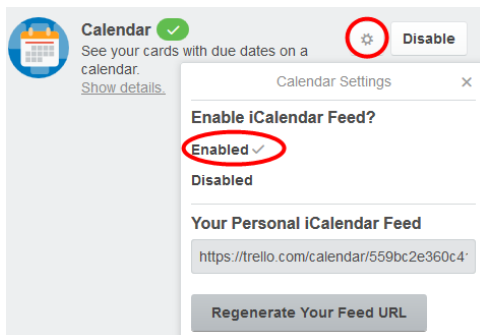
2. Under `Enable iCalendar Feed` click **Enabled**.
3. Copy the feed and add it to the calendar in your email client, so you can see the cards on their due dates directly in your calendar.

   You can even group multiple board calendars in your third-party application.
4. When you want to refresh the entries in your calendar, click **Regenerate Your Feed URL** and add the URL again to your email calendar.

Adding content to cards

Trello provides numerous content, classification and communication features on the details view of each card.
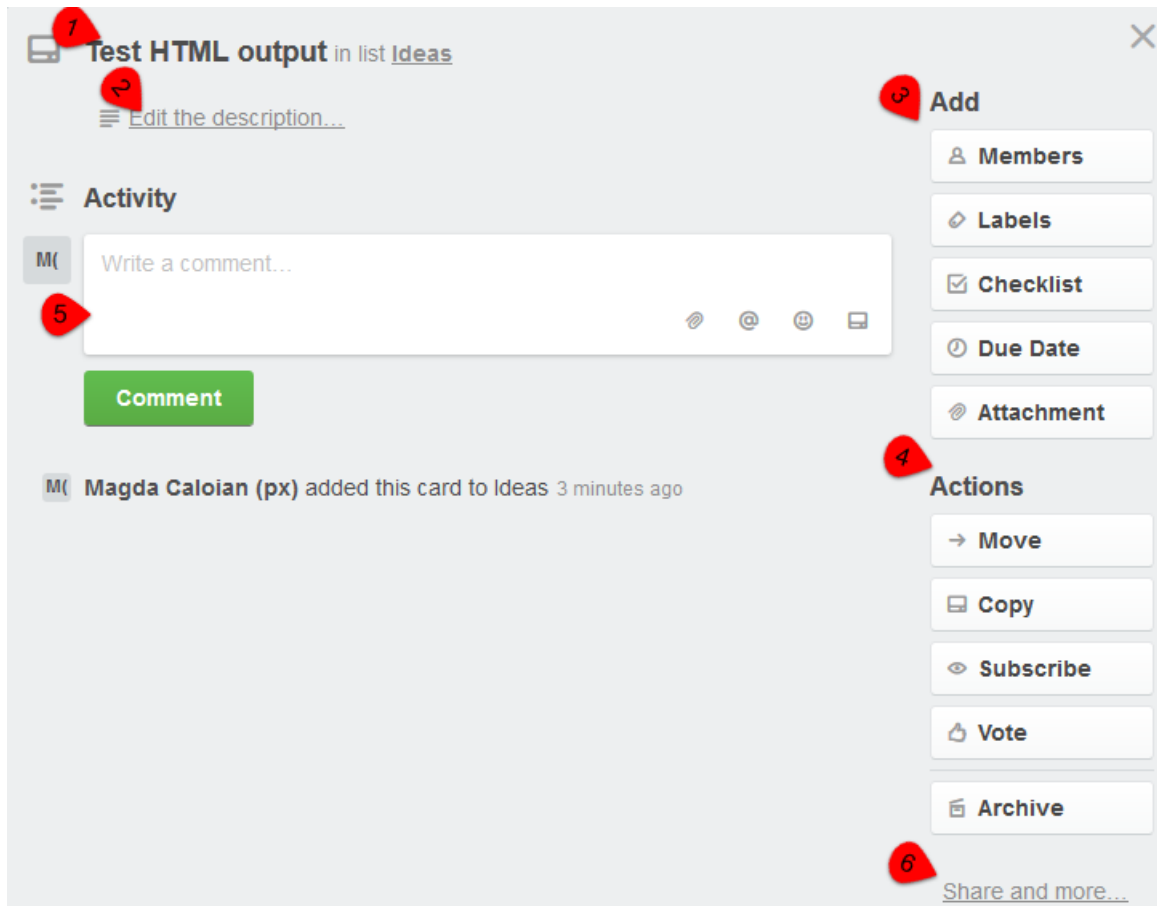
1. Click a card to open its details view.
2. Add or edit content on the card.

   - If you want to edit the card title, click the title (1).
   - Click **Edit the description** (2) and type the card description. You can use markdown.
   - Assign members to the card, add labels, add a due date, create an interactive checklist, add attachments (3)
   - Subscribe to the card, if you are not already monitoring it, or vote for the card (4)
   - Write comments and replies to other members (5)
   - Share or print the card (6)

3. If you want to delete a card, click **Archive**.

   Items are not deleted, only archived in Trello.

4. To close the card, click the close (X) button.

a. title
b. description
c. comments
d. attachments
e. checklist items
f. cover image (credits: https://instagram.com/salavat.fidai/)

Figure 1: The card contents are shown with symbols on the board.

Card titles

Try to write short, intuitive and unique titles, for a fast overview and for efficient search results.

Card description

If you want to apply basic formatting to the description text, click **Formatting help** and follow the markdown syntax. For example:

```
Testing HTML output
================
Select or write a test project
----------------------------------

Make sure it contains the usual and the *less usual* content types:

- all topic types
- inline, block, landscape images, with and without caption
- ordered, unordered, simple lists, definition lists
- tables with and without caption, headers, merged cells, landscape
- all **block** and **inline** elements
- all note types allowed
- all languages used
- hyperlinks
- variables
- conditions
- etc.

Select the HTML pipeline
-------------------------------

* Using an existing HTML transformation with a few parameters set?
* Installing a custom HTML plugin.
* Setting up the publication scenarios
```

```
Publish and QA
--------------------

Generate the HTML output and use a checklist for the QA.
```

Result:
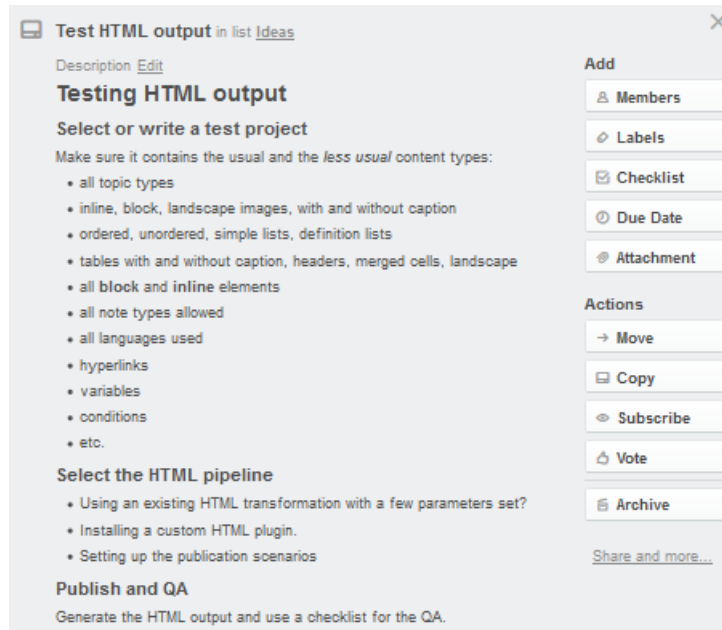
Checklists

1. To add interactive checklists to cards, click **Checklist**, type a title and click **Add**.

Try to write short, intuitive and unique titles, for a fast overview and for efficient search results. You can reuse checklist items with the option **Copy Items From**.

The checklist is added to the card and you can start adding items.

2. Type each item and click **Add** or Enter.
3. Working with checklists:

- You can change the items order by drag & drop.
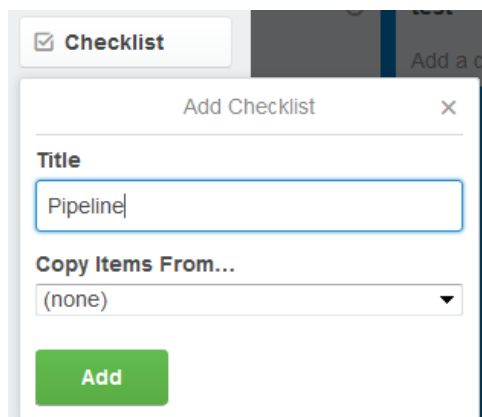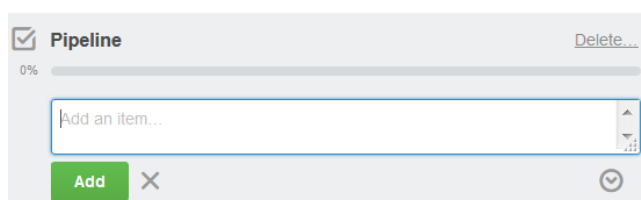- You can add an entire set of items from a text editor, by pasting the list as a single item. Trello adds the lines as single items to the checklist.
- You can convert items to cards, by clicking the item and selecting **Convert to Card**.
- To monitor the progress, click the checkbox for each item, as they are completed.
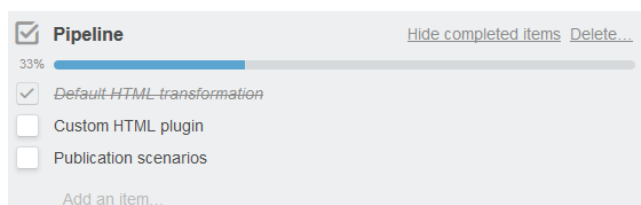
Attachments

You can add files, images and links to a card, either by drag & drop over the card, or by using the **Attachment** option.
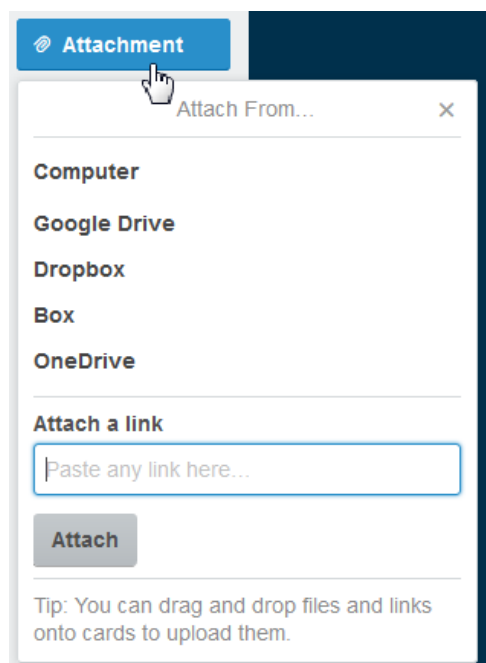
The attached files or links are listed in the card details. Images can even be used as covers for cards.
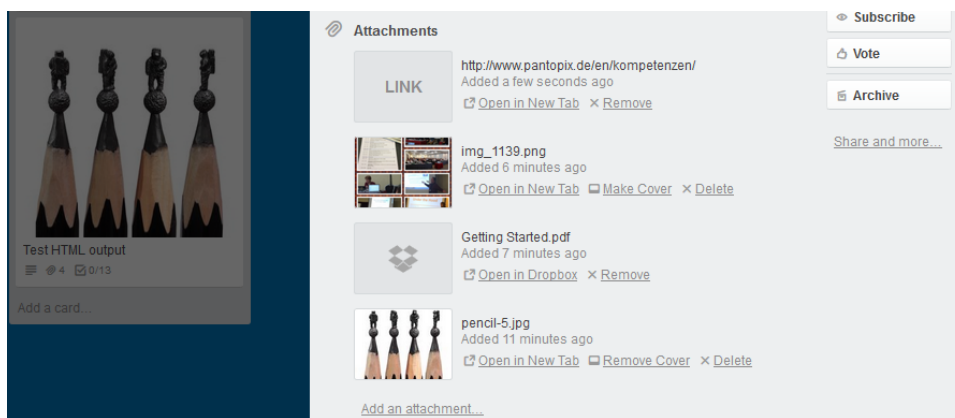
Comments

Use the commenting feature on cards, to record your notes, activity, discussions, etc.
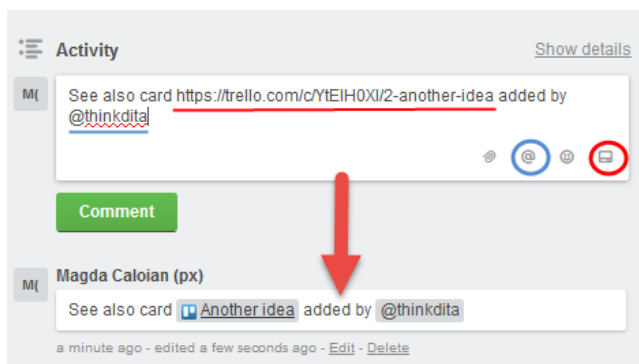
You can refer to other cards (using the card button), add more attachments, mention members (@username) and reply to comments.

Commenting by email

Each card has an email address and a web address, which you can find under **Share and more**.

You can send comments to a card by email, to the card email address.

You can share the URL of a card with members of the organization.

Mentions

You can mention board members on card details: in the description, in checklist items and in comments. The syntax is @username. The members will be notified.

Exporting content from Trello

You can share, print or export board and card contents from Trello.

Business Class boards can be exported as CSV and Excel archives, including attachment files.

Sharing Trello contents

- In order to view the shared content (boards or cards), the recipient has to be a member of the organization, if the board is org-visible, or to be a member of the respective board, if the board is private.
- In order to contribute to shared content, the recipient has to be a member of the respective board.

- Card: To share a link to a card, click **Share and more**, copy the URL under `Link to this card` and send it.
- Board: To share a link to a board, click **Show Menu** > **Menu** > **Share, Print, and Export**, copy the URL under `Link to this board` and send it.

Printing Trello contents

For printing boards and cards, you should use the browser printing options. Currently, Trello offers limited printing capabilities.

- Card: To export the contents of a card, click **Share and more** > **Print** and select the print target.
- Board: To export the contents of a board, click **Show Menu** > **Menu** > **Share, Print, and Export** > **Print** and select the print target.

Exporting Trello contents

- Card: To export the contents of a card in JSON format, open the card, click **Share and more** > **Export JSON** and copy the results from the browser.
- Board: To export the contents of a board in JSON format, click **Show Menu** > **Menu** > **Share, Print, and Export** > **Export JSON** and copy the results from the browser.
- Board: [Experimental or Business-only feature?] To export the contents of a board in MS Excel format, click **Show Menu** > **Menu** > **Share, Print, and Export** > **Excel** then click the generated file.

The generated xls file opens in MS Excel:

|	A	B	C
1	**Points**	**Story**	**Description**
2		**Ideas**	
3		Added from the calendar	
4			
5		**Selected**	
6		Another idea	
7			
8		**In progress**	
9		Added for 16th	
10		Test HTML output	Testing HTML output ================ Select or write a test project ------------------------------------ Make sure it contains the usual and the *less usual* content types: - all topic types - inline, block, landscape images, with and without caption - ordered, unordered, simple lists, definition lists - tables with and without caption, headers, merged cells, landscape - all **block** and **inline** elements - all note types allowed - all languages used - hyperlinks - variables (ask @thinkdita) - conditions - etc. Select the HTML pipeline -------------------------------- * Using an existing HTML transformation with a few parameters set? * Installing a custom HTML plugin. * Setting up the publication scenarios Publish and QA -------------------- Generate the HTML output and use a checklist for the QA.
11		another test	
12			
13		**Blocked**	
14			
15		**Done**	
16		One idea	

Handling items

Trello boards are interactive, so you can easily move cards between lists and boards, but you can also copy contents from one item to another, and convert content items into new cards.

Moving items

- Card:
    - Use drag & drop to move a card on the board.
    - To move a card between boards, open the card and under `Actions` click **Move**. Select the target board, the list and position to move the card to and click **Move**.
- List:
    - Use drag & drop to move a list on the board.
    - To move a list between boards, open the list menu and click **Move List**. Select the target board and position to move the list to and click **Move**.
- Checklist item:
    - Use drag & drop to move an item up or down within or between checklists on a card.
    - To convert an item into a card, click the item, then click **Convert to Card**. The new card is placed on the bottom of the same list.

Copying items

- To duplicate a board:
    a) Open the board and click **Show Menu** > **Menu** > **Copy Board**.
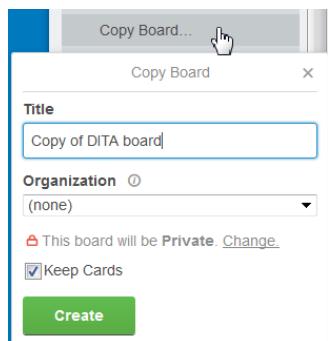
    b) Make the settings in the **Copy Board** dialog.

    - Type the title of the new board
    - Select the organization and eventually change the visibility settings.
    - Specify if the cards of the original board should be kept in the duplicate board.
    c) Click **Create**.
- To duplicate a list, open the list menu, click **Copy List**, type a name for the new list and click **Create List**. The duplicate list is created next to the original list.
- To duplicate a card:
    a) Open the card and click **Copy**.
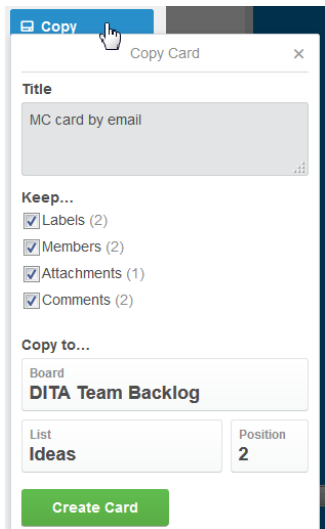
b) Make the settings in the **Copy Card** dialog.

- Type the title of the new card
- Select the items you want to keep from the original card: labels, members, attachments, comments.
- Select the target board, list and position.

c) Click **Create Card**.

• Checklists: When you create a new checklist on a card, you can choose to copy an existing one.

Archiving items

Only board admins can close and re-open a board.

In Trello, some items can be deleted, others only closed or archived. If not deleted, items can be restored.

• Boards:

You can only close and eventually re-open a board. Boards cannot be archived or deleted.

- As admin, click **Show Menu** > **Menu** > **Close Board**.
- If you were the admin of a closed board, you can re-open it from the **Boards** view, under **See closed boards**.
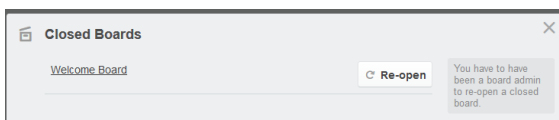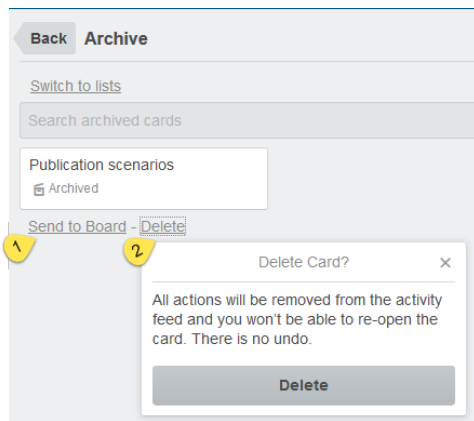

• Lists:

Lists cannot be deleted, only archived and restored.

- Open the list menu and click **Archive This List**.
- You can restore an archived list from the board menu.

• Cards:

- You can directly delete a card by clicking **Share and more** > **Delete**.
- To archive a card, open it and click **Archive**. If you want to delete it immediately, click **Delete**. If you leave it in the archive, you can restore it any time.
- To restore a card from the archive, open the board archive from **Show Menu** > **Menu** > **Archived items** and click **Send to Board** (1).

- To delete an archived card, open the board archive from **Show Menu** > **Menu** > **Archived items** and click **Delete** (2).
- Checklists:

  > 📝 **Note:** If you delete checklists, they are no longer available in the list when creating new ones.

  - To remove an item from a checklist, click the item and click **Delete**.
  - To remove a checklist from a card, click **Delete** next to it on the card.
- Attachments
- Comments

Deleting cards

Closing boards

Examples of boards

Shortcuts and tips

Index

C

close *26*

D

delete *26*
deleting *26*

R

recover *26*
reopen *26*
restore *26*
restoring *26*