

Collaborating online in Trello

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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.

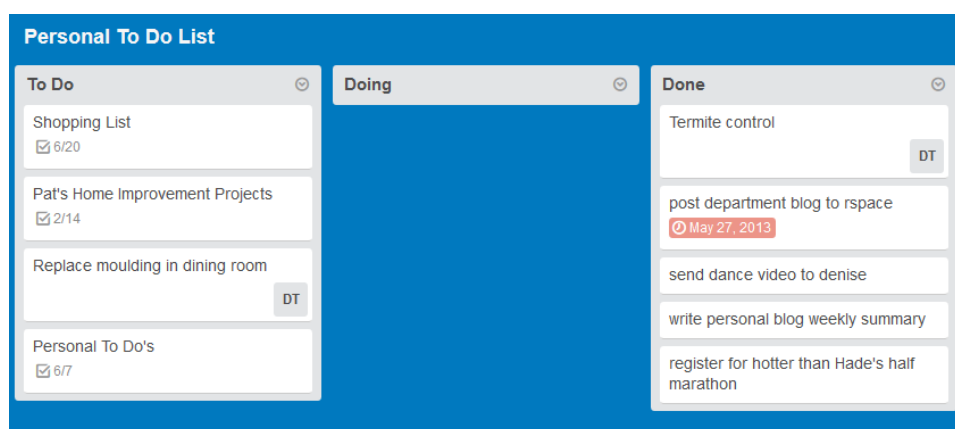
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Related Links

[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.

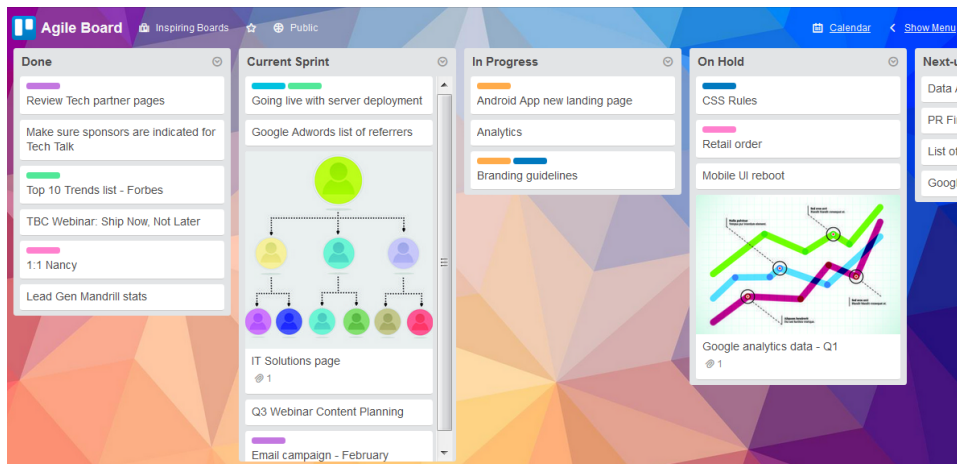
Related Links

[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>)

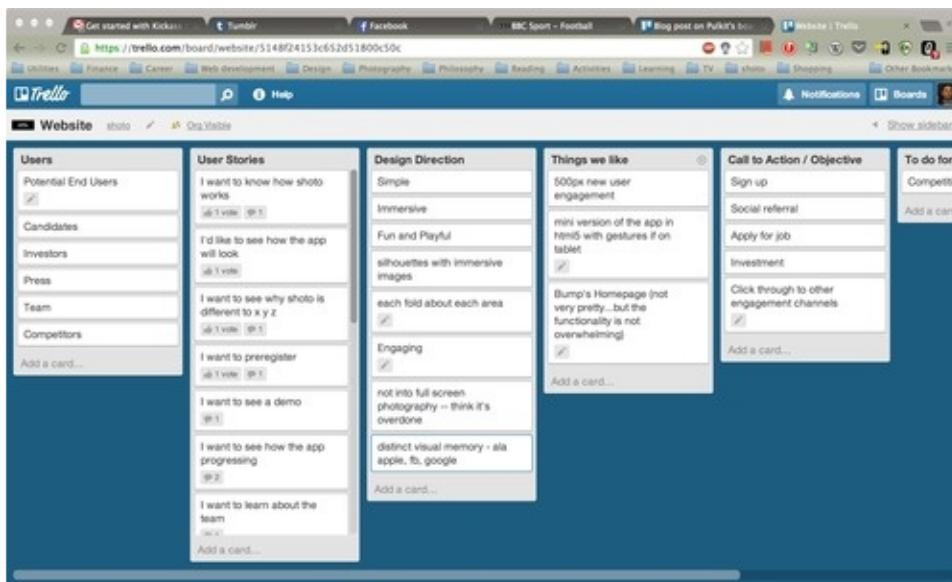
For example, create lists for Backlog, Current Sprint, In Progress, On Hold, Done, etc.

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>)

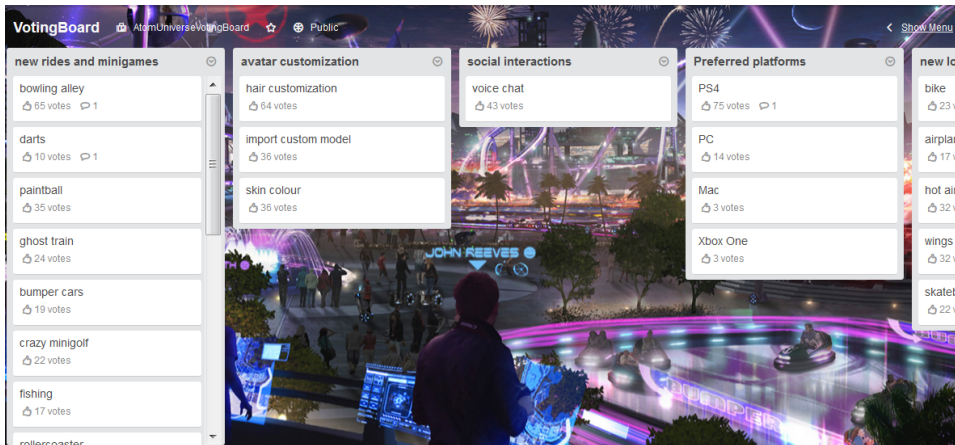
Start by creating cards or lists for each idea, then do card-sorting to create more relevant lists, voting, labeling, etc.

Related Links

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

Voting

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

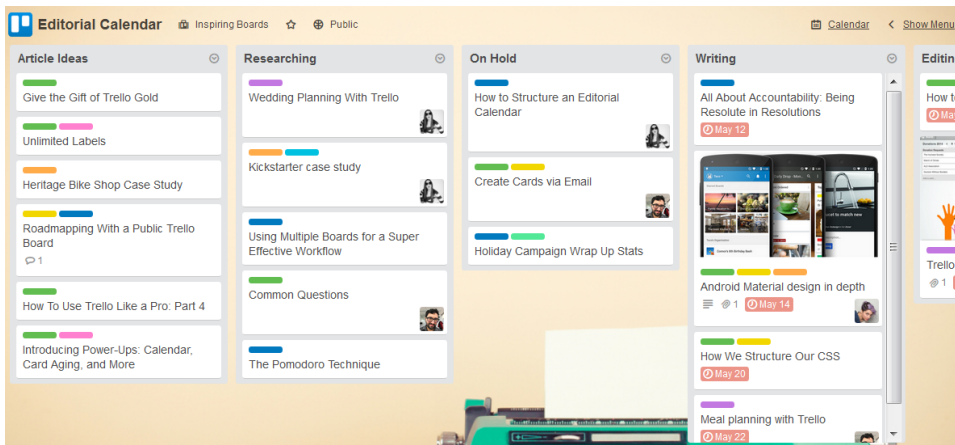


(source: <https://trello.com/b/4WrmVAmH/votingboard>)

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.

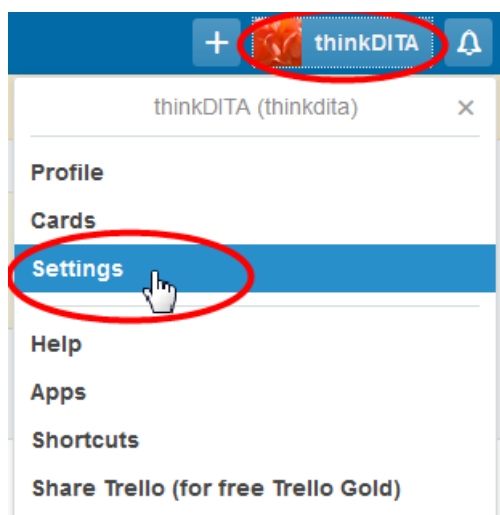
Starting a Trello board

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:
 - Click the hyperlink (**View Organization**) if you have an email invitation, then click **Join Organization** when the organization page opens in your browser.
 - 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**.
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**.



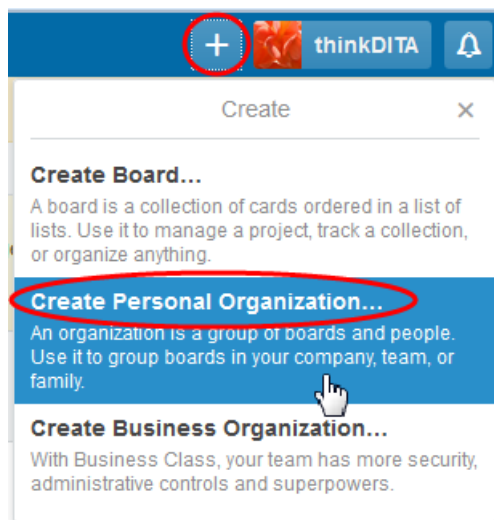
Related Links

[Keeping to-do lists](#) on page 4

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

Creating a personal organization

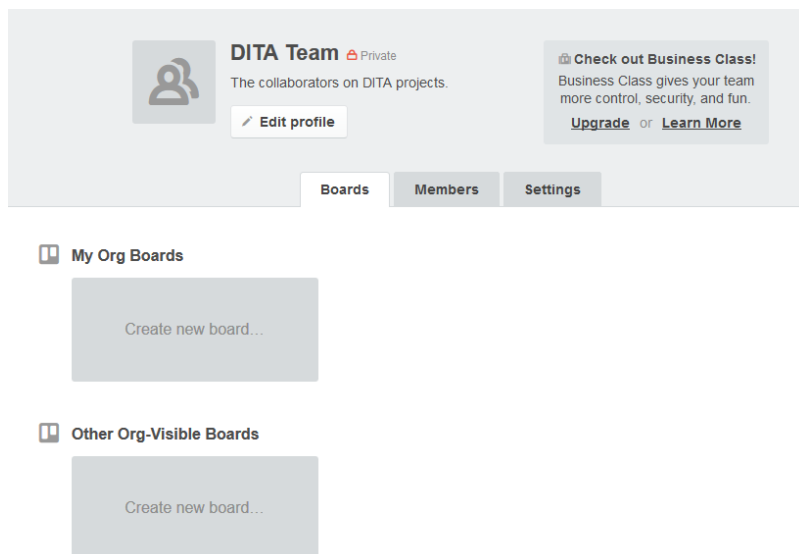
1. To start collaborating with family, friends, club, project team, etc. click the plus sign next to the user name on the top menu bar and select **Create Personal Organization**.



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, 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.

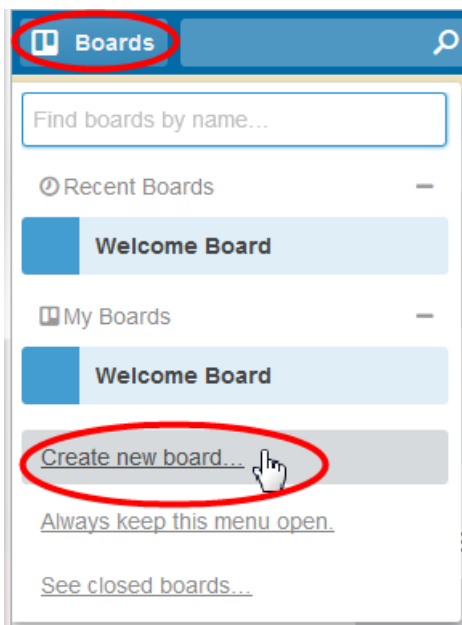
Related Links

[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.

Related Links

[Keeping to-do lists](#) on page 4

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

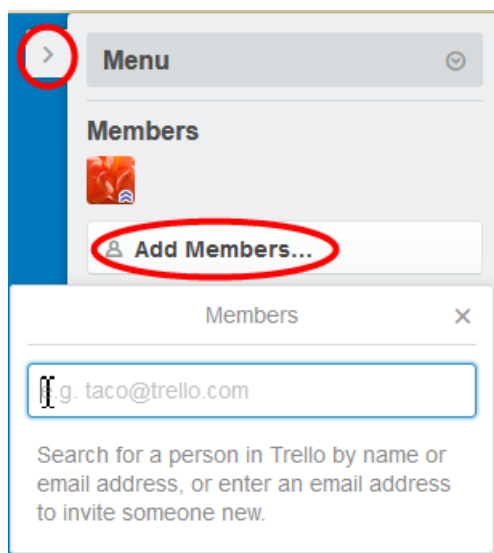
Inviting participants

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

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Creating cards on the board

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Monitoring Trello boards

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Examples of boards

Shortcuts and tips
