Trello Documentation – My Learning

Summary

Trello is a visual project management and collaboration tool based on the Kanban methodology. It uses boards, lists, and cards to help users organize and prioritize tasks. I explored Trello to understand how to create workflows, collaborate in real-time, and manage tasks visually. I also integrated it with Jira to sync issues and manage cross-tool projects.

Key Concepts I Learned

1. Boards

A Trello board represents a project or a workspace. It contains lists and cards. Each board is used to manage a specific project or workflow.
Example:
Board – Marketing Campaign 2025
Use: To manage all tasks related to the campaign, from ideation to execution.

2. Lists

Lists are columns on a board that represent stages of progress or categories of work.
Common list stages include: To Do, In Progress, Done
Example:
List – In Progress
Contains cards that are currently being worked on.

3. Cards

Cards are individual tasks or items within a list. A card can include:
- Description
- Checklists
- Due dates
- Attachments
- Comments
- Labels
- Members

Example:
Card – Design Instagram Creatives
Checklist:
- Draft post designs

- Review with team
- Finalize and upload

4. Labels

Color-coded tags used to organize and filter cards easily.
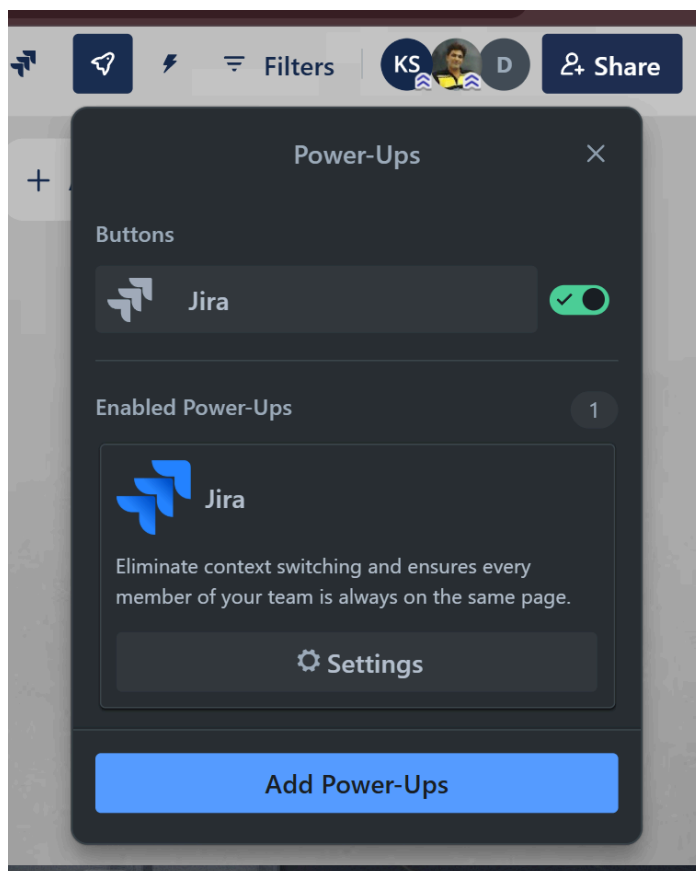Example labels: design, urgent, bug, backend, client review

5. Members

Each card can be assigned to one or more team members responsible for completing the task.

6. Power-Ups

Power-Ups extend Trello's functionality.
I used:
- Jira Power-Up: Link Jira issues with Trello cards.
- Calendar: View cards with due dates in calendar format.
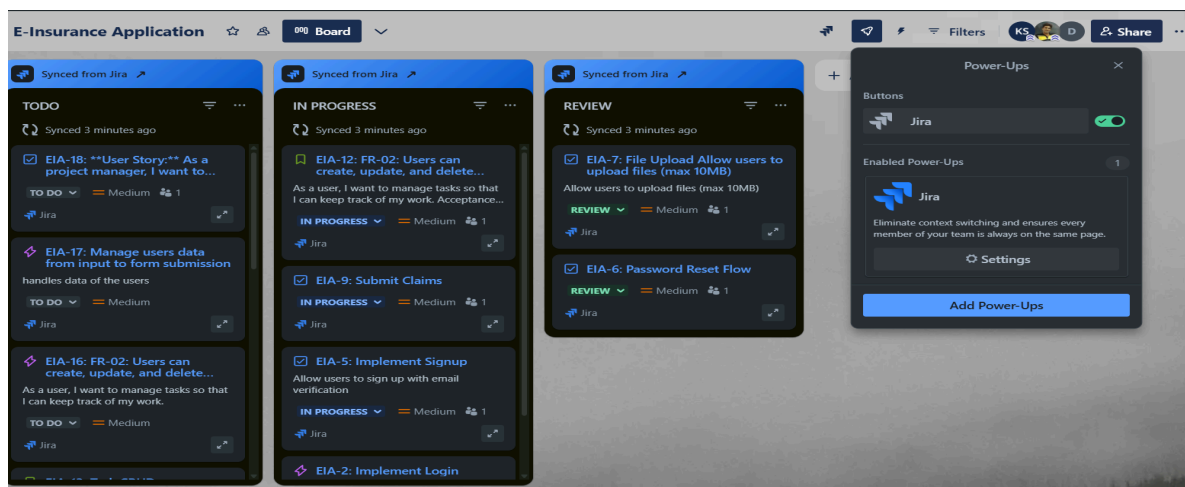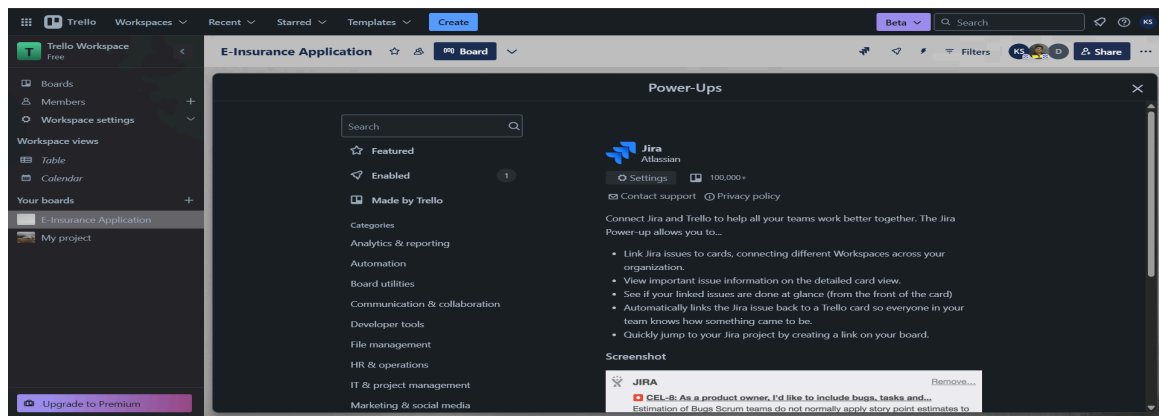- Butler: Automate actions using simple rules.

7. Jira Integration

Enabled Jira Power-Up to sync Jira issues in Trello:
- Linked Jira issues directly to Trello cards.
- Created Jira issues from Trello.
- Viewed Jira issue status and priority in Trello.

Helps in cross-functional team management where development uses Jira and marketing uses Trello.

Sample Workflow I Practiced

1. Created a board – Product Launch Tasks
2. Made lists: To Do, In Progress, Review, Done
3. Added cards under To Do with:
   - Checklists
   - Labels like 'design', 'content'
   - Due Dates and Assigned members
4. Moved cards across stages
5. Linked Jira issue (e.g., Backend API Bug) to relevant Trello card
6. Used Butler Automation to move cards to "Done" when checklist is complete

Board View

- Visual Kanban-style layout.
- Drag-and-drop cards between lists.
- Color-coded labels for quick recognition.
- Attachments and comments in each card for collaboration.

Helpful Features I Explored

- Checklists: Breakdown of a card into smaller steps.
- Due Dates: Automatic reminders and deadline tracking.
- Filters & Search: Find tasks by label, member, or keyword.
- Power-Ups: Added Jira, Calendar, and Google Drive integrations.
- Automation: Created basic rules with Butler.

What I Found Helpful

- Clean, intuitive interface with drag-and-drop support.
- Real-time collaboration with team members.
- Easy to customize boards for any workflow.
- Jira integration gave full context of development tasks.