Using Trello

The basics

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Growing schools
advice ¦ support ¦ ideas

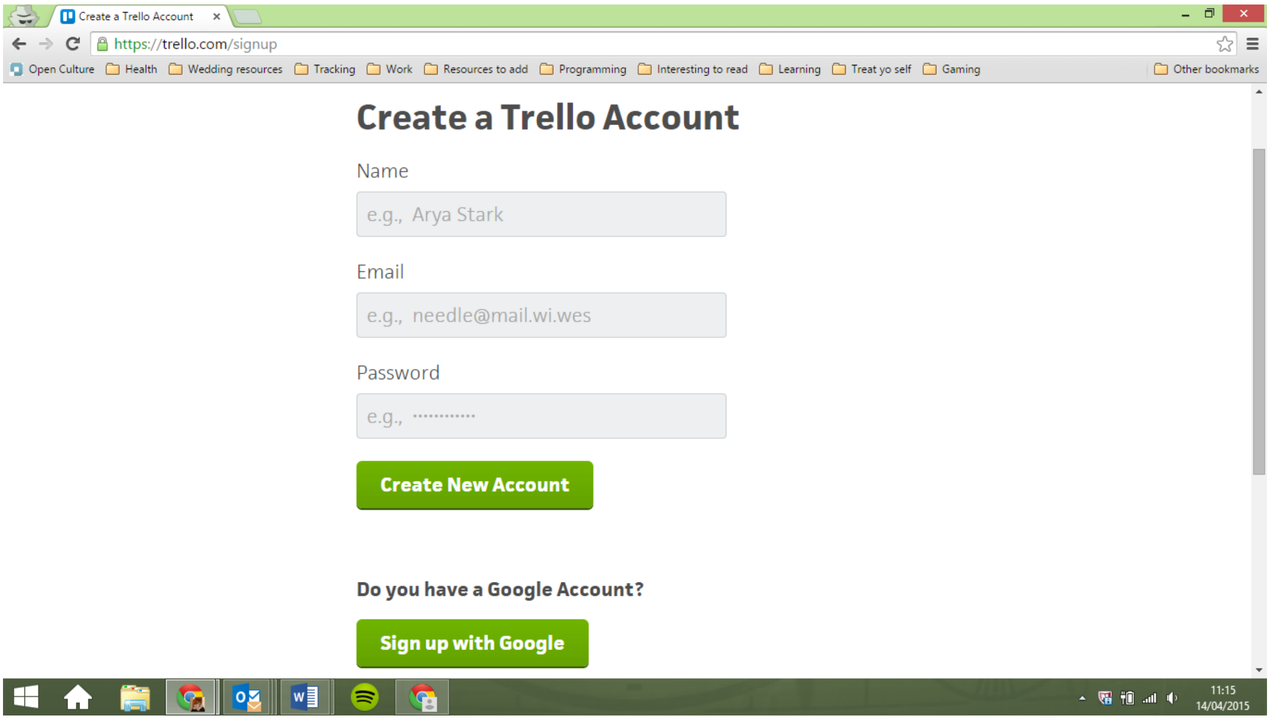
New Schools Network

Contents

Creating an account

Creating a Trello account is free, and simple. You will need an account before you can use Trello, or the project management board that we have created.

To create an account go to www.trello.com. You will see the following screen:



You can sign in using a google account (i.e. if you have a gmail account that you use for e-mail and to sign into chrome), or any other e-mail.

If you have a google account and would like to use it to sign in to Trello, then click on the 'sign up with google' button. You will be asked whether you want to allow Trello to access your google account, and you should select 'yes' to complete the sign up.

If you don't want to use a google account then you should enter your name, e-mail address, and password into the boxes provided, and select 'create new account'.

Once you have completed these you will be taken to a welcome board which is the standard board that Trello gives you to start with. You will also get a confirmation e-mail to address that you used to sign

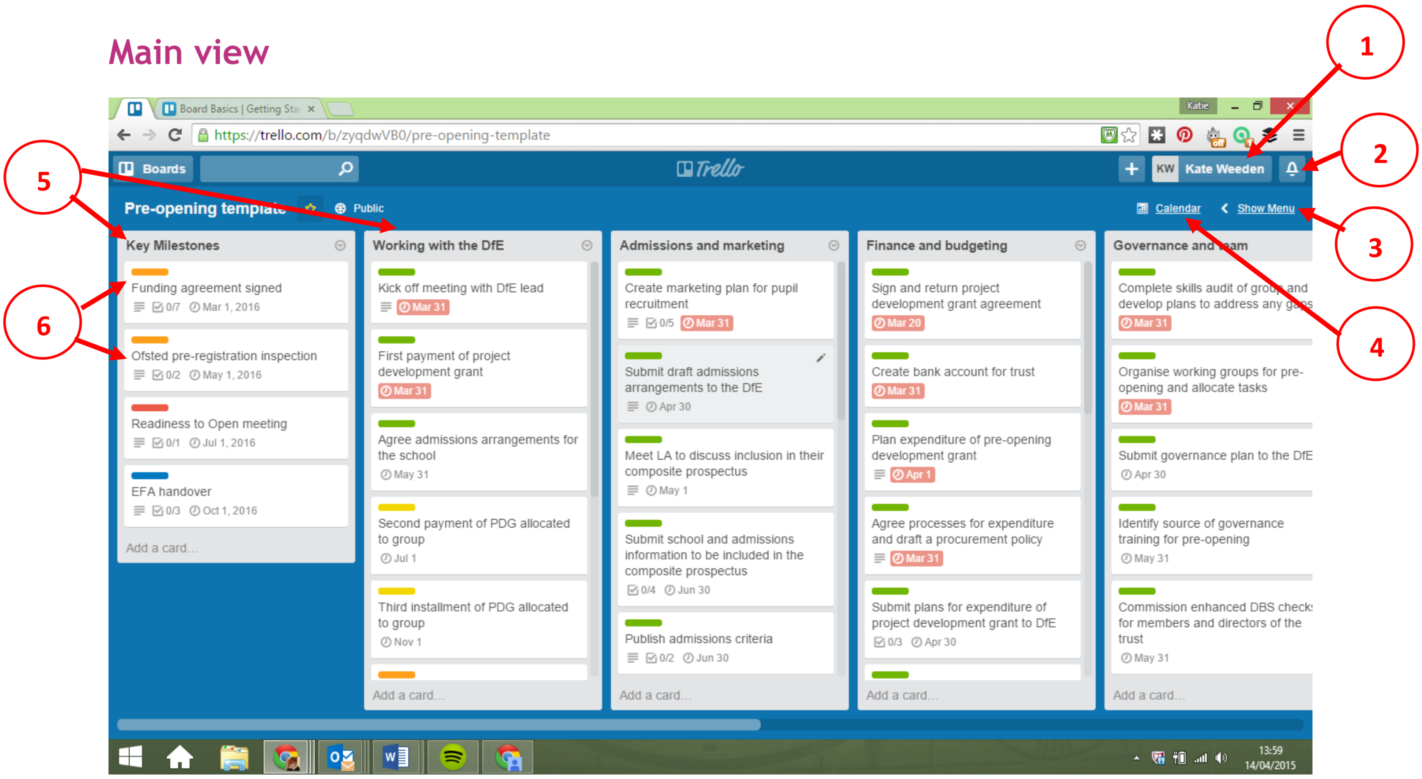
You're now ready to use our tool!

Navigating the basics

Once you have created your account, followed the [link](#) to our template, you will see the screen below. There are a lot of different elements to Trello, but once you know what they all are, it is an incredible simple and easy to use programme.

This guide explains the basic elements of Trello. If your team does not yet have its own copy of the project management template, you should follow the guidance [here](#) to make one.

Main view



1. Your account
   When you click here you will be given options to do with your account. You will be able to change your password and the e-mail address. You can also access the Trello [getting started guide](#) from this menu.

2. Alerts
   The background of this bell will turn red when you have an alert. You will get alerts when another member of your team has updated a card.

3. Menu
   When you click on 'show menu' you will get a number of additional options regarding your board. You can find more information about what these options are below.

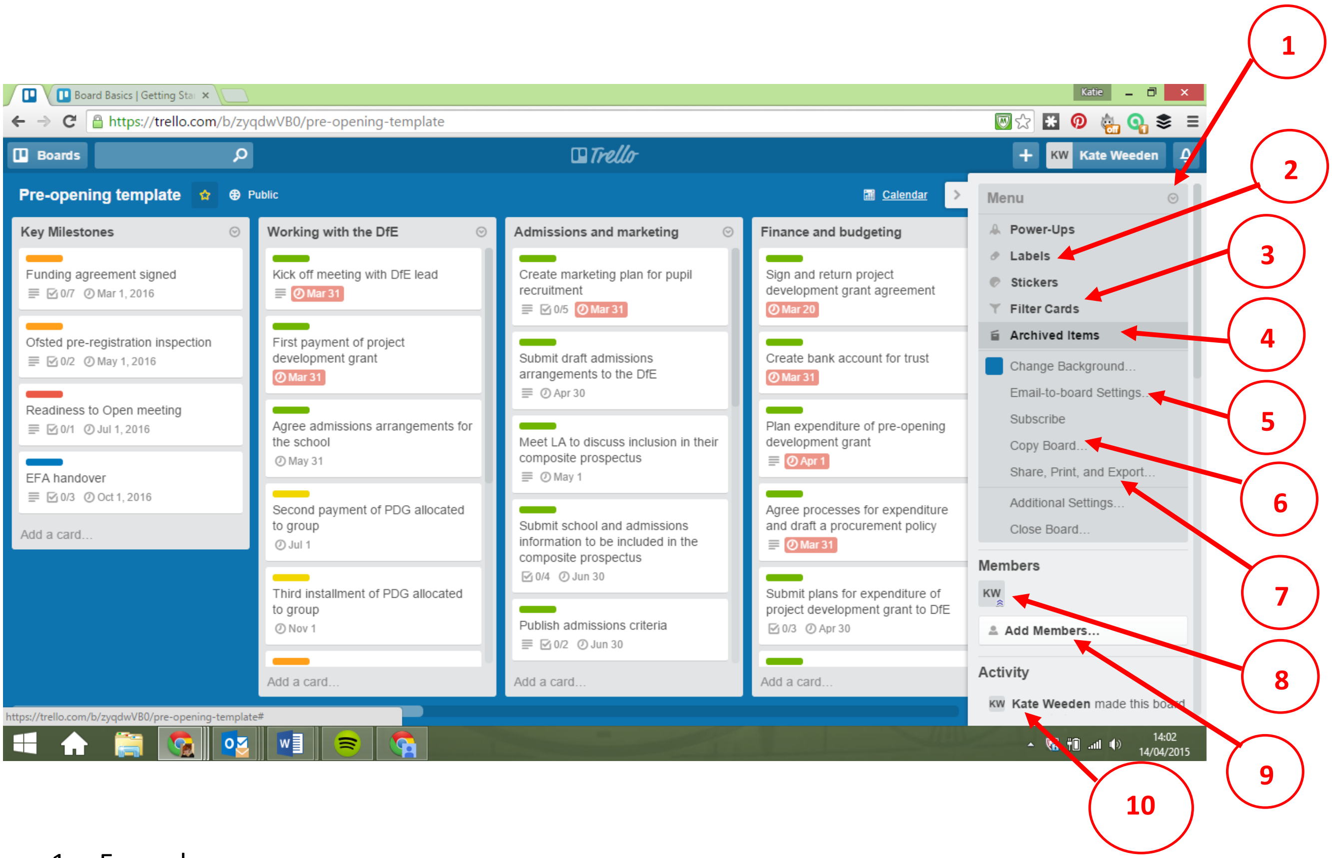
4. Calendar view
   This button will represent your board as a calendar, organised according to the due dates of each card. To get out of the calendar view, you simply click the calendar symbol again.

5. Lists
   Lists keep cards organized according to themes. For this template, we have created a list or each area of work within your project. You can easily move cards from one list to another, or up and down in the same list, by dragging a card and dropping it in the desired position.

6. Cards
   The fundamental unit of a board is a card. Cards are used to represent tasks. There is no limit to the number of cards you can have on one board.

Menu

Once you have expanded the menu, you will presented with a number of different options that allow you to edit the way in which you board works.



1. Expand menu
   If you cannot see all of the options displayed above when you open the menu, then click the small, downwards pointing arrow in the top right hand corner to expand the menu options.

2. Labels
   Labels are a way of categorising cards. Each label will be associated with a colour, which are then displayed on each card tagged with that label, as shown above. Labels give you a quick way of filtering your tasks. In this template we have created labels for each of the phases described in the DfE pre-opening guide.

   By clicking on the 'labels' option here you will be able to edit existing labels and add new ones.

3. Filter cards
   This allows you to view only the cards that adhere to certain criteria. You can filter cards by label, by the member of your team that tasks are assigned too, and by due date. This means that you team members will have a way to easily see only the tasks that are assigned to them, for example.

4. Archived items
   Once you have completed a task, it will be archived. This is where you can view all of these archived tasks.

5. E-mail to board settings

Trello gives you the ability to add new tasks, simply by sending an e-mail. Using the options here you can set where the new task will be placed on your board.

You might, for example, want to create a new list called ‘unsorted’, and set your ‘e-mail to board’ settings so that any task that is e-mailed in goes to that list, to be sorted later.

Once you have set where your task will go, it is very simple to use this function. Simply send an e-mail to the address provided (which you will see once you have clicked here), with the title of the task as the title of the e-mail. Anything that you type in the body of the e-mail will appear in the body of the new card.

6. Copy board
   This option allows you to copy the board. It is using this that you can create a copy of our template board.

7. Share, print and export
   This option provides you with a link to your board, which you can send to members of your team, along with a printable version of the board.

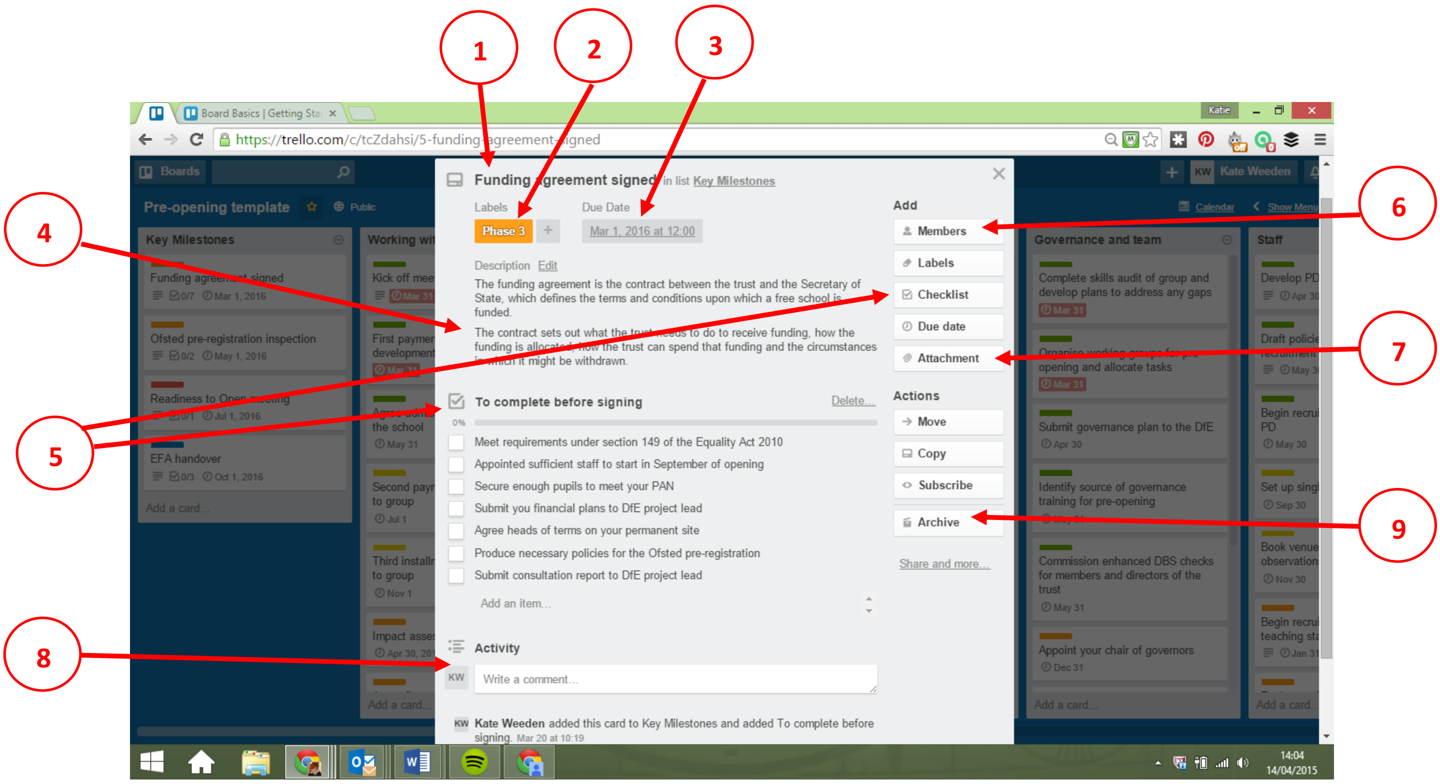
8. Members
   This will list all of the members of your board. Members are individuals, with Trello accounts, who can add to and edit your board.

9. Add members
   You can use this box to add members to your board. You can enter the e-mail address of individuals who have Trello accounts, and it will add them to your board. You can also enter e-mail addresses of individuals who have not yet created a Trello account and it will send them an e-mail, inviting them to create an account. Once they have done this, they will be able to access your board.

10. Activity log
    This list the most recent changes to your board. It is a good way to see what other members of your team have been doing.

Cards

Whilst you can see an overview of each card when you look at the board as a whole, you can add a range of additional information about each task once you have opened an individual card up.



1. Title
   The name of your task.

2. Labels
   Labels that have been assigned to this card. You can add further labels by clicking the + .

3. Due date
   The deadline for this activity. You can alter the deadlines by clicking on the date, at which point you will see a calendar where you can select a new deadline.

4. Description
   This contains information about the task. We have already filled in relevant information about each of the tasks that we have created, but you may wish to make this more specific to your project. Simply click the word ‘edit’ above the description to add or change the text.

5. Checklist
   You can add checklists to your tasks using this option. We have included some checklists of what you need to do within different tasks, but it is likely that you will want to add your own. As you check off each item, Trello will show you a ‘percentage completed’ progress bar.

6. Members
   Using this function you can assign a specific member of your team to the task. Individuals must be subscribed to the board to be able to be assigned to a task.

7. Attachment
   You can attach documents (from google drive or dropbox as well as from your desktop) to cards, as well as images.

8. Activity
   You can add comments to each tag, with additional information, or explaining any actions that you have taken towards completing this task. All members of your team will be able to see any comments that you include here.

9. Archive
   When you have completed a task, click 'archive' to remove it from your board.

Adding cards

To add a card, simply scroll to the bottom of the list that you wish to assign the card to, and click 'add'. You can rearrange the order of your cards by dragging and dropping them in place.

Adding lists

To add a list, scroll to the right of your board and select 'add new list'. You can rearrange the order of the lists by dragging and dropping them in place.