

Cathy Mazak: Now I'm going to talk about how we're going to use Trello in this course. There are three types of boards that we're going to be creating in Trello. We're going to create boards that I'm calling working boards or live boards and those are boards that will have to do lists on them, boards that you're actively interacting with on a daily basis or whenever you're working on a particular project and so there's going to be a lot of movement and action on those boards.

Cathy Mazak: Then there's going to be boards that are going to serve more like repositories of information or you could call them a library or a reference board. I love boards like that when I am on the go whether it's actually on my phone or searching the Internet for something and I come across an article that would just be perfect for a project. I even will start the kernel of my lit reviews on a Trello board and I can just have the different topics and I have a card for each source.

Cathy Mazak: Again, this is not where I'm writing or composing my lit review, but where I'm starting to gather and be able to visually look at and see how I want to order the sources in my lit review. You can have a board that's a repository of ideas so every time you get a new research idea or a new writing idea or an idea for a course, you drop it into a certain board and just sit there kind of holding on to your information so that it's not in more than one place.

Cathy Mazak: So it's not in a file or a Google doc and also in your email and whatever but rather you have everything kind of gathered in a repository. That can be a useful type of board. And then the thing that you'll be using a lot of in this course are boards that I'm calling templates. Now, all a template board is, is a board that I've created for you ahead of time with the lists and the cards set up on them and also sometimes the labels.

Cathy Mazak: I'll have boards like this created for you. And when I say template, it's just that I've pre-created the board and you're going to copy and paste it really into your Trello account. I have all the boards in my Trello account and they are listed as public and by listing them as public, let me actually do this. If I list the board as public then over here on this menu I can get a URL for that board and share it with you so I can link to the board here.

Cathy Mazak: Now, when you share a link to a public board, anybody can see it but they can't edit it. To edit it you have to actually copy it and paste it to your Trello account and that's what I mean by template. You're going to be copying and pasting boards that I've already pre-created for you. Those are the types of boards that you will be creating and setting up for yourself as you work through this course and build your system a board at a time.

Cathy Mazak: Just some basics. Every project is going to get a board. We don't want to have multiple projects on a board except for what I'm calling the home base board and I'm going to be telling you more about that later and also the publication pipeline board. In the publication pipeline you want to see a top down, big picture view of your projects. Each project will

have a card, but those cards you'll link through to a board for each writing or research project.

Cathy Mazak: It'll become clear as we work through the system, but a general rule is that every project gets a board. You don't want everything smushed up onto one board. You have to get comfortable with the idea of multiple boards that are connected together, linked together through the system that I'm going to show you. You can also and you will be starring you're currently in use boards.

Cathy Mazak: If you go up here to the board menu, you'll see that I have some that are starred. It's very easy to star a board. Just when you go to the side over here, you'll see a little star and there you go. If I want to make it first, just like everything on Trello, you can drag it around. I can order these in a way that makes sense for me. So you ordered the star boards in a way that makes sense to the workflows that I'm going to be teaching you.

Cathy Mazak: That's the basics of using Trello in this system. Now, some basics for collaboration. I've mentioned some of these already. You can invite other people to your board. They need to have their own Trello account and if you share the board with another member, so you invite somebody here, you either need their email address or their name or you can create a link to invite them and send them an invitation.

Cathy Mazak: Then their little face will show up here with yours and they will be able to edit the board. That way if you're collaborating with a co-author or a student or research team, you can have everybody here sharing the boards. Now, teams are just for people who you regularly collaborate with and you can set this board up to private so only people on the board can see it or for example if you have a research team or a group of graduate students, you can call them a team and create team boards.

Cathy Mazak: That way you don't have to individually add each person every time. Then there's public boards which we already talked about. Once you've invited other people to your board, that means they can edit your board. If it's a team, all the team members can edit the board and interact with the board. It becomes like a collaborative board. And as you do that you are going to want to use the tagging feature, which is just using the @ sign.

Cathy Mazak: As we said here, you can add a member to a specific card. Let's say you have a research team of five people, but you're working with one specific person on a sub part of the project, well, you can add them as a member on your card. Or if as you're going through the project a certain thing that applies to a certain person needs attention, you can tag that person. You can either make them a member on the card and then they'll see all the activity that happens on the card or you can use the @ symbol to tag people as you message back and forth on the actual card.

Cathy Mazak: One thing that's important for collaboration in Trello is that it's not like Slack or Messenger where there's a messaging feature like you have

Facebook and they have Facebook Messenger. It's not like that. All the messaging happens in context so it happens on a card. That's also important to know. And then as I mentioned before, you can watch cards. If you're working with someone, it's a great idea to have them set up notifications for themselves and watch cards that are important or that are hot that you're working on right now.

Cathy Mazak: All right, that's for collaboration. Some advanced strategies, you can send cards to another board. If you have something on one board and you want to move it someplace else, you can send it over either by copying it and then moving it or just by moving it. And again, here you would, if you want to click on here, let's see, I have so many boards. If you click on here you would choose the board and then the list that it would go to and the position on that list and you would click move and it would show up over there.

Cathy Mazak: There is a Chrome plugin that you can search for that lets you basically kind of create a card using a little plugin. You would click on the plugin sign and you can create a card from Google Chrome which is useful. You can also integrate with your Google Calendar. In the Trello system there's basically three levels of Trello and there's the free basic level which is what this system relies on.

Cathy Mazak: You don't need to spend any money on Trello or do anything, just sign up for the free account. In that level you get one kind of thing that's called a power up and you can integrate, for example, your Google Calendar using this thing called a power up. If you pay for Trello, you get three power ups and if you have the business edition of Trello, you get unlimited power ups. I have never used anything besides a Google Calendar integration power up and so that's what I'm recommending for this system.

Cathy Mazak: That's what power ups are. There's also a little program that works inside of Trello called Butler where you can set up automations. We won't be using that feature in this system, but I wanted you to know that it exists. So if you want to get super fancy, you can set up automations, it is possible. For example, when you check off all the things on a card it automatically archives or things like that. You can set up automations with a little program called Butler.

Cathy Mazak: And then also something that I kind of really think is cool is that you can email directly to a card comment. If you click on a card, you can see, where are you? But when you click on share, you get an email. Every card has its own email address. If I click over here and I copy this email address that's on this card, I can go to my email and send a message that will show up. Don't freak out about the number of emails I have because this is my junk email account.

Cathy Mazak: I'm going to put test and test and send it over. There it goes and you can see that it shows right here that it emailed it as a comment. That can be a useful thing. Again, if you're on the go. What I like about it is that if you get an email that is related to a project, you certainly could copy and paste that email into a comment or into a description. But you

could also come over here, grab the Trello email and just forward that to this card.

Cathy Mazak: We'll be talking about this later in the course, you could have part of your home base board for kind of emails that need to be put into your project management system and just keep sending emails to card comments and then creating cards from them and then moving them to the right boards. That's a little strategy later to reduce email that we'll talk about. That is basically Trello. Let me show you one more thing. Sorry, I forgot the side menu.

Cathy Mazak: The side menu here, you can do all kinds of stuff in the side menu including change the background. You can use stickers on cards. This is where you would add your power ups. You can have one if you have the free account and then you have a running track of activity. When you click more, you can see other things. You can watch a board, you can copy the board, you can print and export, you can link to the board as we've shown before.

Cathy Mazak: You can click the settings to change it to a team setting and set permissions and things like that. When you're ready to create a new board, you can click this new board sign or over in boards at the very bottom you can create a new board right there. All right, that's my introduction to Trello. I hope that it has been helpful and I will see you in the next lesson.