

Cathy Mazak: Hi there. In this video I'm gonna be teaching you the basics of the project management system called Trello. Now, Trello was developed as a visual project management system that kind of represents digitally a poster board or a pegboard, a corkboard, and actually index cards pegged to that board. And as you can see here, we really have lists and things on the lists. That's what it looks like at first impression, right? So we have these columns, and they are formed as lists. So I'm gonna just go through the basics of what the components of the board are and how to use them, and then also the components of the cards, and you're gonna see very quickly how a system or a piece of software that is very simple can be very powerful.

Cathy Mazak: So first, just the anatomy of a Trello board, or the anatomy of Trello. So Trello is an online app, you see it through a web browser at Trello.com. So you do need an account, so once you sign up, then you will, when you log in at Trello.com, you will see all of your boards. And there's also a phone app, so you can see Trello through your phone. Now, Trello is made up of a series of boards. So when I go up to the upper left here and click on "boards," you're gonna see a whole lot of boards. I have many, many, many boards. But I'm gonna teach you a way to organize them, you won't probably have as many as I do. Maybe you will once you kind of get addicted to using this system for everything.

Cathy Mazak: But basically, first you have boards, and a board just looks like this, you're looking at one right now. And then each board has lists and cards. So you add lists horizontally and cards vertically. So to add a list, it's very, very simple. You just click right here on "add another list," and you will be able to add something. So I can just title it something, click "add list," and there you go. And you can keep going kind of to infinity, off to the right-hand side.

Cathy Mazak: So that's boards and lists. Now, the real power here in Trello are the cards. So vertically here, you can add cards to your lists. So it's very simple to add a card, you just click here, give it a title, and click "add card." So when you click on the cards, you get to see what's called the "back" of the card. So you click on the card, and there you get to see what's on the back of the card. And there are many, many tools and functionalities in here. Basically, though, you have a description, and actually when you first see the back of a card, you won't see this checklist. But you can add a number of checklists. So you can even have more than one.

Cathy Mazak: In the description here you can really type whatever you want. I love to use it to drop links and to save for later, to make notes, but really anything could go in there that you want to type. It's a text box. You can add checklists, they're super easy to add items to. And here you can even tag using the @ symbol. You can tag people who are sharing the board with you. So if you are working on a board collaboratively with a co-author or with a student or with another colleague, then you can tag them and actually assign things on the checklist to that person. Anyway, you just click "add," and one thing I love about the checklists is that as you check off items, you get this wonderful bar going across until, bing, it turns green and you're done. So I love that feature, I love checking things off lists. So there's that.

Cathy Mazak: Also, you have a lot of interactive capability on cards. You can do running comments, it will show them in reverse chronological order, so the most recent thing first. And here you can really, in a comment you can do anything. You can attach a file, and you can attach a file from your Google Drive, from your Dropbox, from One Drive, or from your computer. You can attach a link. You can also tag people. So if I had other members on this board, I could tag them in comments and they would get a notification. I can add emojis. And I can actually add a card or a board from somewhere else in Trello onto this comment. So if you started, let's say some project was getting hashed out here on this board between you and someone else, and then you decide "I'm gonna create a separate board for this," or another card for this, then you can actually put a link that would jump them right to that board or card.

Cathy Mazak: And then any activity that you have going on, so anything added or completed, there's kind of a running log of activity on each card. So that's this part of the card. Over here to the right you'll see other features as well, including members. So you can add members to this board, and it's pretty easy to search for members once you have your friend or colleague or student sign up. You just need their name, and you can add them to your board.

Cathy Mazak: This is a feature that I love. You can create labels for things, And this is gonna be part of our system. So basically if you wanted to create a label that said "research," you can give this an actual ... if you click the little thingy there, the little pencil, you can change the color, you can give it a title. And for example, I'm gonna label this card "research," and you'll see when we ... it's grayed out right now, but when we go back to the board, you'll see that you can see the label on the front of the card.

Cathy Mazak: Another thing that you can do besides the checklist is to add the due date. So you can go through the little calendar here and add a date and time. I've put this one, was already due from before.

Cathy Mazak: You can click a due date and add a date and time, you can also remove a date and time. And something that I really love, let me change the date here to something that is in the future, is that as you get closer to the date, it's gray now, but as you get close to that date, it will be yellow, and then when it's past due it will be red, the color red, until you decide that your card is done, and you can click it off and it will be green, marked done and complete.

Cathy Mazak: You can also add attachments. So again, you can really attach anything to a card, you can link something in your Google Drive, your Dropbox, any kind of attachment, you can attach images, PDFs. If you attach an image, it comes up as like a cover image, which is really nice, so you can see it on the front of the card, even though it's attached to the back. And really, you can hook any project you have to a card. Now, this is gonna come into play in our system as we move through, and especially when we're working, for example, on a writing project. You're not gonna do your actual writing in Trello, you're going to be doing your project management of your writing in Trello. And so you're gonna want to link to the document where you're doing your writing, that way it's

right at your fingertips and you don't have to be searching for it, or even navigating to it. So that's something that we'll definitely be using.

Cathy Mazak: Now, you can also do actions with cards. You can move a card very easily to another board or to another list or to another position. You can copy a card. So one thing that you might find is that it would be nice to have, is that in certain boards you're gonna want to have cards that serve kind of as templates. So let's say you developed, even it could be something like a simple research procedure that you have listed as a checklist, and you want to be able to keep that card as a template, and you can just very easily do something like label the card "template" like that. And then you know that you need to copy it before you make changes to it. So you can very easily copy cards, send them to other boards.

Cathy Mazak: The watch feature lets you get notifications on the board, or on the card. So any time anything happens on the card, you would get a notification. And in Trello, again, this is grayed out right here, but you can see in the upper right-hand corner is the notification, this red box with a little bell. Those are your notifications, and so if you have cards that you're watching, maybe you're waiting for a student to go through a certain amount of the checklist before you get in and take on some other checklist items, then they're gonna show up in your notifications.

Cathy Mazak: Archiving the card is pretty much deleting it, or putting it away for later, and then you can also share cards. So as you can see, there's lots of things that you can do, lots of functionality in the Trello cards.

Cathy Mazak: Now, another thing that we really love is that you can very easily move things around on this interface. So if you want to relist these in a different order, you can very easily just move the cards around. So that's a really, really helpful feature. And you can easily move a card along. So when we're doing our publication pipeline, it's easy to move a project down through the pipeline. Super easy and very satisfying to move that project along.

Cathy Mazak: Now, you'll see here from this card that we were working on, there are some things that you can see on the front of the card. You see the card's title, you see the due date, you'll see the checklist, and you'll see, like here we checked off all four things on the checklist, so it says "four of four" and it's labeled green. But if we were here and we unchecked something, then that changes and we see that we only have three of the four things done on that checklist, and it's not green.

Cathy Mazak: And then also we have labels, and you can have multiple labels on a card. You can hide the label so it's just a little color, or I like, of course, to click on it and see the label name. And so you get quite a lot of information on the front of the card. If you had an image on this card, it would also show up on the front of the card.

Cathy Mazak: All right, so those are kind of the basics of Trello and what it is. We went through all of these things, you can set up notifications, you can watch a card. Here's the notifications over here. You can archive cards,

which is deleting them. There is an app for your phone. Obviously on the phone you're not gonna get this lovely horizontalness.