Trello for Collaboration

Hands on exercises

Exercise 1

1. Rename your Untitled board (click on the Untitled board at the top and rename to fit your scenario)
2. Click on Add a Card in the 'To do' List, give your task a title and click on Add card
3. Add a few more Cards with other tasks on them to create a list.
4. Practice 'dragging and dropping' your Cards to reorder.
5. Now add a couple of Cards in the 'Doing List'
6. Drag a Card from the 'To do' into the 'Doing' List
7. Click on a Card to open it
8. Add a description (note you can also edit the Title)
9. Now look at the right-hand menu and...
10. Add an attachment – upload a doc or add a hyperlink to e.g. a website
11. Add a Checklist and include a couple of sub tasks (you can then tick these off as you complete them)
12. Scroll down and write a Comment (here you can discuss the task with others)
13. Click on Cover and choose a Colour or Image and the format you prefer
14. Close your Card using the X at the top right
15. Click on Add another List (next to Done) and add Issues log

Exercise 2

1. Click on Share and choose the Share by link option.
2. Copy the link and paste into the Zoom Chat (the Superhighways team will join your Board so you can practice assigning tasks later!)
3. Click to open a Card and select Dates from the right hand menu
4. Add a Start and / or Due date and select the Reminder of your choice
5. Add a Label to your Card – select a Colour but also click on the pen icon to give your Label a Title e.g. a category related to your work
6. Now click on Members and click on your Trello username
7. Close the Card (top left X) and note how now any Label, Date and Member assigned to the Card now shows in the List view
8. Click on another Card and select Members and search for Sorrel, Kate or Paul and assign to us (you can select multiple Members for any Card)
9. Continue to add a range of Dates, Members and Labels to all of your Cards
10. Now select the Filter button (top right) and have a go filtering the Cards by Member, Date and Label. (You can clear all Filters by selecting the X next to the Filter button. To clear some filters, click on the Filter button and untick the Filters you no longer want)