As a writer, instructor, and lecturer, my daily life screams of deadlines and “to-do” lists. Add into the mix my personal genealogy research, tasks related to running my own business, and a hectic travel schedule, and it seems there are never enough hours in a day. Therefore, I’m always searching for apps or other online tools that save me time, keep me organized, and help me to simply get things done. Enter Trello — a free online collaboration tool that organizes projects and ideas into boards. This article will explain how I use Trello to manage and improve my workflow.

How it Works

Trello, a product of Fog Creek Software, basically works this way: Boards + Lists + Cards. A Trello board is some task, item, or project, or product that is under continuous development, but a board can have a variety of uses and mean different things depending on how you choose to use it. Boards are made up of multiple lists. Lists contain cards. Think of it having a stack of notecards to refer to — only virtually. There are a number of ways you can make Trello work for you. For example, you can use it to:

- Create research plans
- Organize your genealogy research tasks
- Storyboard writing projects
- Collect ideas or give yourself reminders
- Build a travel itinerary for a vacation, research trips, conferences, etc.
- Keep track of client projects
- Plan family reunions
- Collaborate with others on research projects or writing a family history

Since every genealogist and writer works differently, your concept of a card may be different from mine, and you’ll likely have your own lists and your own workflow.

Signing Up

To get started, simply go to the Trello website, www.trello.com. Once there, you can either sign up for a free Trello account, or log in with an existing Google (Gmail) account. Once you’re logged in, you should visit the “Welcome
Board” to get a feel for how Trello works. While you have the “Welcome Board” visible on your screen, notice the little orange lock. This is where you adjust your privacy settings: you can make your board “Private” — so only those you add to the board can view or edit it, or “Public” — where it’s visible to anyone with the link and will show up in Google and other search engines, but only those added to the board can edit it. There’s a third option just for Trello organizations — a way of grouping people and boards. Read more about how to set up organizations on the Trello website. You can also customize your profile with an avatar (if you use your Gmail account, Trello will upload the image you have set up on your Google Plus profile). The tour button, http://trello.com/tour, located at the top of the Trello home page will give you a nice visual overview. You can also click on the “Help” link at any time to learn to view online help for specific features. There is also a blog (with RSS feed) with news and tips.

Create Your First Board
Create a new board by clicking the “Boards” menu in the header and selecting “New Board…” or by clicking “New Board” in your Boards page. Give your board a name. You also have the option of creating an organization, which makes sharing and working within a group easier. (This is good if you are co-authoring a book, or serving on the planning committee for your next family reunion). Your Trello boards will represent different projects (e.g., a surname, record type, place, etc., a client, or research task. If you are working on a writing project, this can be a story topic or lead, idea, or book chapter. Cards can move from list to list to indicate progression (for example, if you’re working on the opening paragraph of a story, you can move it to the “Doing” list and then when you finish it, move it to the “Done” list). Board members can add themselves to cards, start conversations (by adding comments) on cards, create checklists for specific tasks on cards, and so on. You can have as many boards as you like and there is flexibility to edit, move and delete a board’s content and change its members. I have boards for writing assignments, book projects, blogging, travel, and specific speaking engagements.

You can change these headings and also add your own additional lists by clicking the “Add List” button on the right-hand side of the page. Cards represent the basic unit of a board. For instance, for genealogy this can be a surname, record type, place, etc., a client, or research task. If you are working on a writing project, this can be a story topic or lead, idea, or book chapter. Cards can move from list to list to indicate progression (for example, if you’re working on the opening paragraph of a story, you can move it to the “Doing” list and then when you finish it, move it to the “Done” list). Board members can add themselves to cards, start conversations (by adding comments) on cards, create checklists for specific tasks on cards, and so on. You can have as many boards as you like and there is flexibility to edit, move and delete a board’s content and change its members.

Trello organizes projects based on Boards, Lists, and Cards. View the Welcome Board after log in to learn how to use each of the components.
(where I outline trip details, due dates for syllabus materials, presentation topics, and more).

You can also add due dates, attachments (files or images up to 10 MB each), and other information to your cards. Think of the front of your card as the overview and the back of the card as your detailed outline for the project.

Editing Boards
To get back to a specific board, click on the “Boards” tab in the top right corner. Here, you can select a board. You can also click “See All Boards” to eyeball all of your boards and search your boards. You can then add or edit your lists, cards, etc., move things around, change your labels and filters, due dates, and more.

Glance Back into the Past
Have you ever been working on a research plan, blog post, or a narrative and wonder how you did something, or when? Luckily, Trello keeps a record of everything that’s happened on a particular card, including additions, changes, and comments. This provides a nice sense of security and clarity, especially if you’re like me and sometimes work on a project, leave it for a week, a month, or even longer, and then come back to it wondering where you left off.

More Features
There are other great features. One is labels — you can use them to color code a card by type (a single card can have multiple labels). You can also use filters to only show what you want, and can even filter by keywords or person (if collaborating as part of a team). There are also keyboard shortcuts and the ability to set up notifications. In addition, Trello has Apps for iPhone, Android, and Windows Phone, so you can seamlessly work on projects anywhere. This is one of the features I like best. If I think of an idea and I’m not near my computer, but have my smartphone with me, I can use the mobile app to add lists and cross off tasks on the go. I work on many projects with overlapping deadlines, and I tend to jump back and forth between them, so Trello keeps me on track.

Summary
Once you’ve experimented with Trello, get accustomed to the layout, learn the shortcuts, and use its collaborative features, you’ll find it will help you to see your projects in a different light — breaking them into smaller, more manageable pieces. I’ve tried (and to some degree, still use) a number of other project management tools, but one of the things about Trello that stands out for me is that it gives the whole picture. The premise of Trello is “Your entire project, in a single glance.” Trello tells you what’s being worked on, who’s working on it, and where something is in a process. Think of it as your own amped up whiteboard in the cloud that you can adapt and customize to easily take with you, no matter where you go.

Freelance writer, instructor, and lecturer, LISA A. ALZO is a frequent contributor to Internet Genealogy.