

**How to Use**



**for Advocates**

# How to use this tool

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This guide will teach you how to use Trello to plan projects for your organization. Trello is an online tool that is kind of like a big whiteboard. It will talk about how each function works, and how to use them for a project. These are the functions that will be covered:

- Using Boards, Lists, and Cards
- How to Add Documents and Comment
- Adding People
- Tagging People
- Adding Deadlines
- Adding Checklists

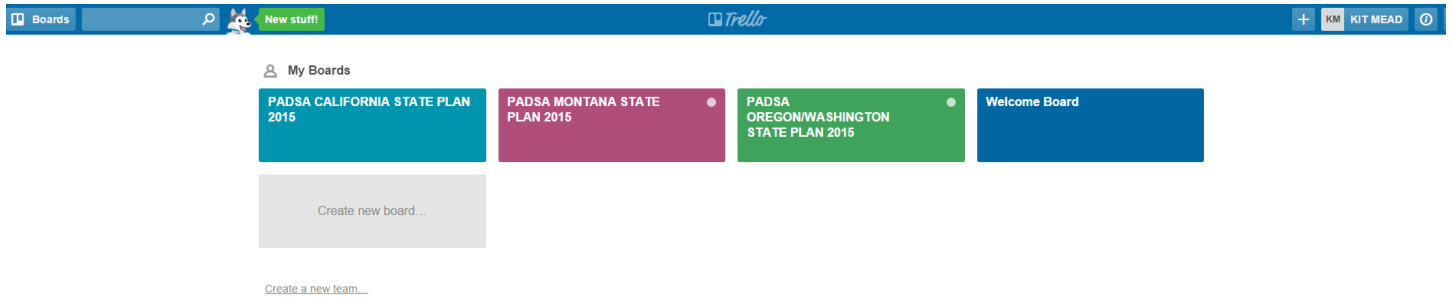
all with specific examples and illustrations.

# Boards

The first thing you should do is make a Board for your project. Boards are the biggest sections to put things in. Boards allow for projects to be separated, or for big ideas to be separated.

Each project or big idea should have its own board. For example, if your self advocacy organization has a plan for self-advocacy in your state, you might make a board for your plan.

In the picture below, you can see an example of a Trello with 4 boards: one for each state plan in the Pacific Alliance, and one “welcome” board, which teaches you how to use Trello.

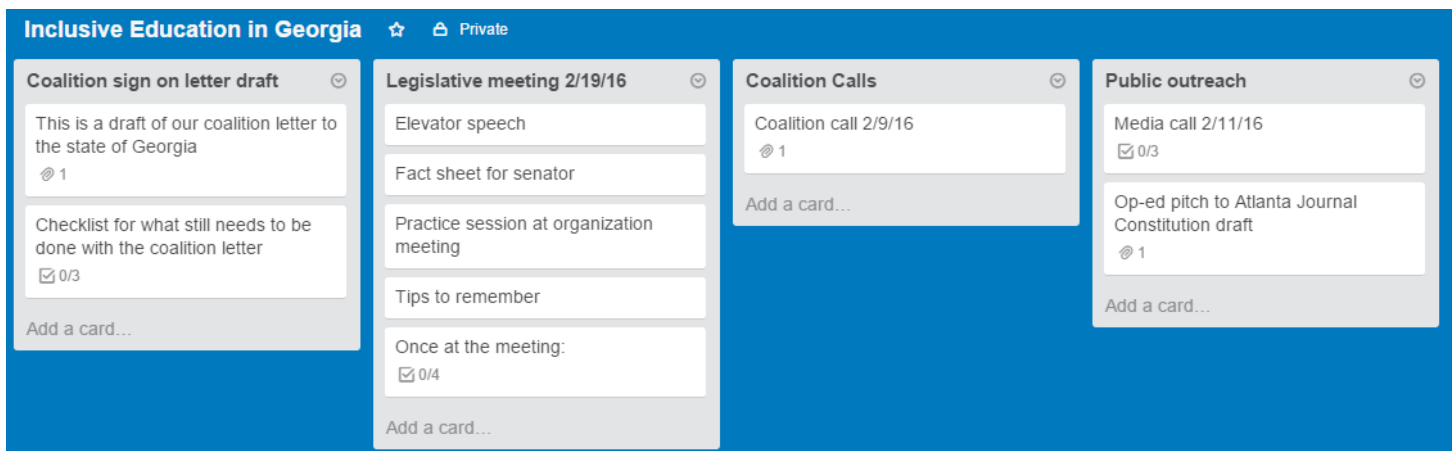


# Lists

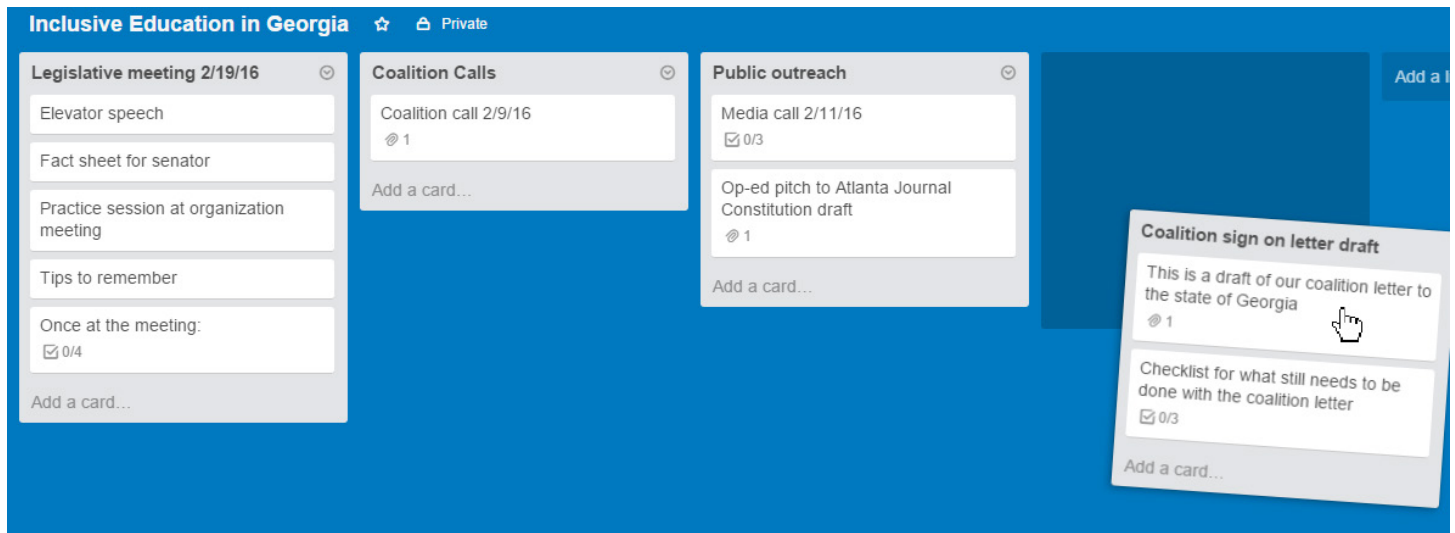
Lists are the next step. Lists are a way to organize all of the steps in a project, or all of the smaller ideas in a big idea. One board can have many lists.

Below, you will see a board about an advocacy plan for Georgia. The advocacy plan has 4 parts, so this board has 4 lists.

Each list shows a different part of the advocacy plan: a coalition letter draft for other organizations to sign onto, legislative meetings, coalition calls, and public outreach.



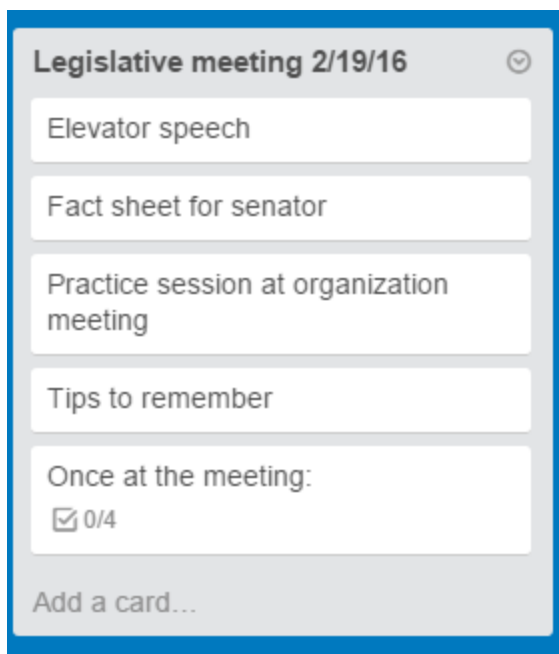
Lists can be dragged and re-organized with the click of a computer mouse. For example, if we wanted to move the coalition sign on letter draft from the left side of the board to the right, we could just click on it and drag it over to the right.



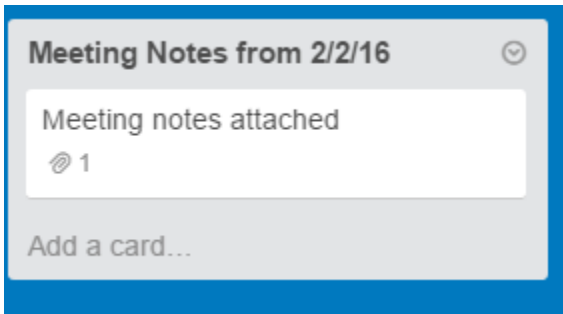
## Cards

You can add “cards” to Lists. A card is a place to talk about a specific step in a list, or a place to talk about a smaller part of an idea. Usually, each list will have several steps or smaller ideas. You should give each step or idea its own card. For example, let’s look at the board advocates created about Georgia.

In list 2, the advocates are planning for a visit to their state senator. In list 2, they list all the different steps they need to take to get ready. Each step has its own card. There is a card for writing the elevator speech, writing the fact sheet to give to the senator, a practice session at their meeting before meeting the senator, tips to remember at the meeting, and a checklist for what they need to do at the meeting.



A different group of advocates in Georgia is using their board to share information on inclusion in school. They are using their board to organize an idea. Each list is about a different part of the idea. In list 1, they post an update after every meeting. Each update gets its own card.



To add a card, there will be an option to “add a card” under the list topic or existing cards. For example, if we wanted to add a new update to list 1, we could just click on list 1 and click the “add a card” option when it comes up.

## Things you can do with cards

Since cards are a place to talk about specific steps in a plan or specific parts of an idea, they have a lot of features. These features can make it easier to keep track of things. Some of the things you can do are:

- add documents
- add comments
- tag people
- set deadlines
- make checklists.

The screenshot shows a Trello card titled "Media call 2/11/16" in the list "Public outreach". The card features a due date of "tomorrow at 12:00 PM (due soon)", an attachment of "talking points.docx", and a checklist titled "Prep" with three items: "Talking points", "List of questions they might ask", and "Practice session at organization meeting". The card also includes an "Add Comment" section with a text input field and a "Save Comment" button. On the right side, there is a sidebar with "Add" options (Members, Labels, Checklist, Due Date, Attachment) and "Actions" (Move, Copy, Subscribe, Archive), along with a "Share and more..." link.

**Media call 2/11/16** in list **Public outreach**

Due Date  
tomorrow at 12:00 PM (due soon)

[Edit the description...](#)

**Attachments**

DOCX talking points.docx  
Added a minute ago  
[Download](#) [Delete](#)

[Add an attachment...](#)

**Prep** [Delete...](#)

0%  Talking points  
 List of questions they might ask  
 Practice session at organization meeting

[Add an item...](#)

**Add Comment**

KM Write a comment...

Save Comment

**Add**

Members  
Labels  
Checklist  
Due Date  
Attachment

**Actions**

Move  
Copy  
Subscribe  
Archive

[Share and more...](#)

## Adding documents

First, let's learn how to add a document. Adding documents can be helpful if you have a document you want everyone on your team to read. It is hard to write long things on Trello, so adding a document can be easier.

For example, if the group working on inclusion in schools wanted their group to read a letter from the Department of Justice about inclusion, they could attach it to the card with the most related update.

Adding documents is a multi-part process. First, you have to go to the card you want to add a document to, and click "add attachment." Then, you have to find the document on your computer or wherever else you put it. Select the document, and click attach.

The screenshot displays a Trello card interface. The card title is "This is a card. Drag it onto 'Tried It' to show it's done." and it is located in a list titled "Stuff to try (this is a list)". Below the title is an "Add Comment" section with a text input field and a "Save Comment" button. The "Activity" section shows a log of actions: "KIT MEAD removed Checklist from this card just now", "KIT MEAD added Checklist to this card 2 minutes ago", and "Trello added this card to Stuff to try (this is a list) Jan 9, 2015 at 1:37 PM". On the right side, there is an "Add" menu with options: "Members", "Labels", "Checklist", "Due Date", and "Attachment" (which is highlighted in blue). An "Attach From..." dialog box is open, showing options for "Computer", "Google Drive", "Dropbox", "Box", and "OneDrive". Below these options is a section for "Attach a link" with a text input field and an "Attach" button. A tip at the bottom of the dialog box reads: "Tip: With Business Class you can attach conversations from Slack, pull requests from GitHub and leads from Salesforce."

## Adding comments

You can also add comments to a card. Comments can be a good way to update other people about the step or idea you are working on for that card. For example, in Card 3, the group is trying to write an elevator speech for their visit with the state senator. Person adds a comment to the card to share their idea for a speech.

**Elevator speech** in list Legislative meeting 2/19/16

[Edit the description...](#)

**Attachments**

**DOCX** elevator speech.docx  
Added just now  
[Download](#) [Delete](#)

[Add an attachment...](#)

**Add Comment**

**KM** I really think this is on the right track. I would add a brief introduction to who you are before you start talking about everything else. |

**Save Comment**

**Activity**

**KM** **KIT MEAD** attached [elevator speech.docx](#) to this card  
just now

**KM** **KIT MEAD** added this card to Legislative meeting 2/19/16 43 minutes ago

**Add**

- Members
- Labels
- Checklist
- Due Date
- Attachment

**Actions**

- Move
- Copy
- Subscribe
- Archive

[Share and more...](#)

To add a comment, go to the card you want to comment on. Scroll down to the section that says “Add a comment.” Type in your comment, and then click “save comment.”

**Add Comment**

**KM** I really think this is on the right track. I would add a brief introduction to who you are before you start talking about everything else. |

**Save Comment**



## Tagging people

You can also tag people on a card. “Tagging” someone lets them know when you’re mentioning them or talking about something you want them to see. If several people in your group are working on the same topic, you might want to tag them all on the same card. For example, Person A, Person B, and Person C are all working on inclusion. Person A tags person B and person C so that they can see everything that gets said on the card.

**Elevator speech** in list **Legislative meeting 2/19/16**

[Edit the description...](#)

**Attachments**

**DOCX** elevator speech.docx  
Added 5 minutes ago  
[Download](#) [Delete](#)

[Add an attachment...](#)

**Add Comment**

**KM** I really think this is on the right track. I would add a brief introduction to who you are before you start talking about everything else. @Person B and @Person C, can you do that?

[Save Comment](#)

**Activity**

**KM** **KIT MEAD** attached [elevator speech.docx](#) to this card  
5 minutes ago

**KM** **KIT MEAD** added this card to Legislative meeting 2/19/16 an hour ago

**Add**

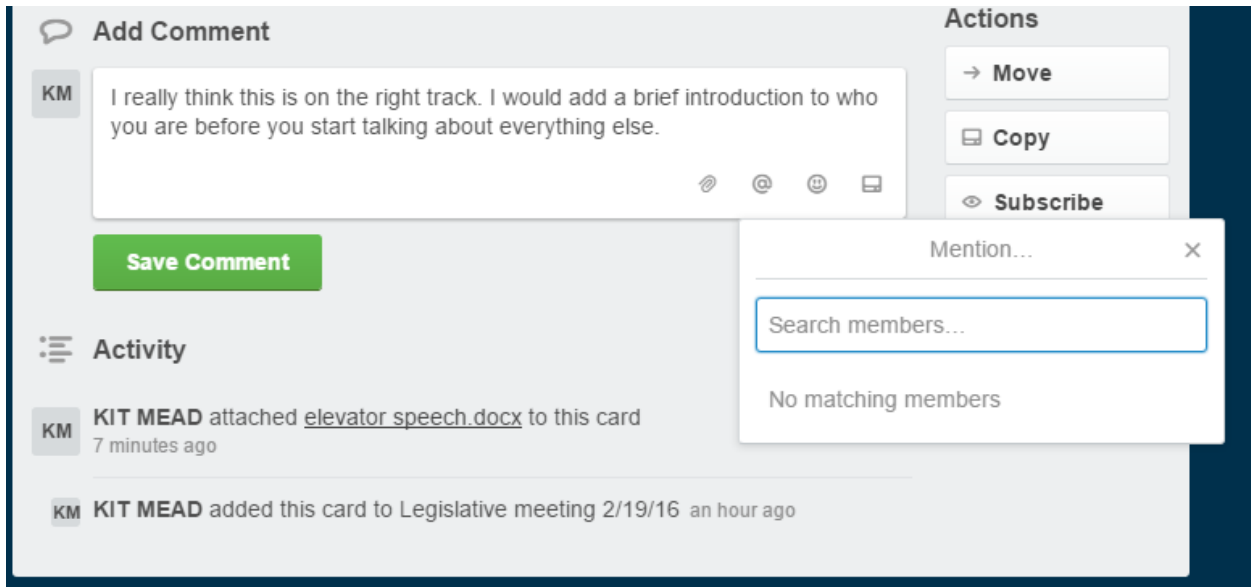
- Members
- Labels
- Checklist
- Due Date
- Attachment

**Actions**

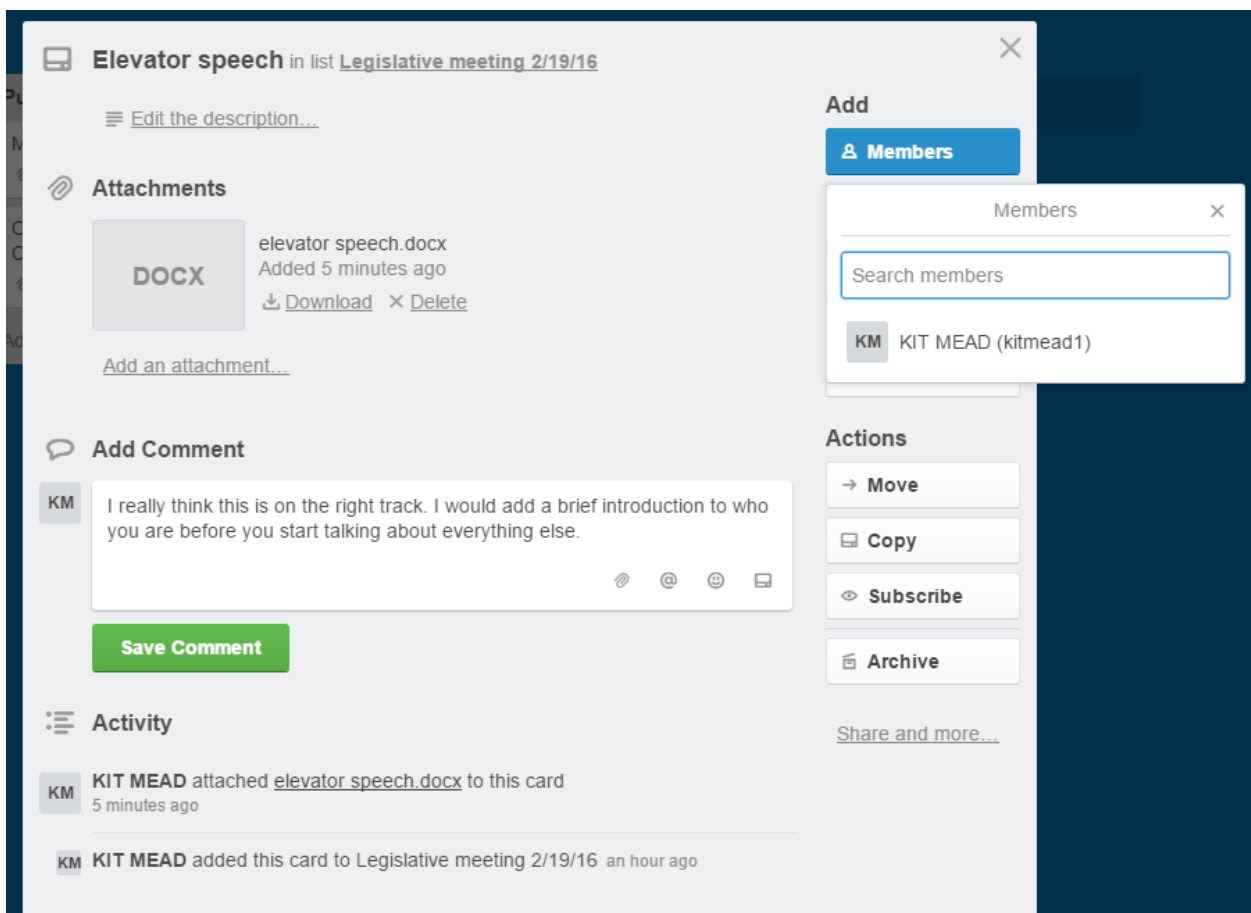
- Move
- Copy
- Subscribe
- Archive

[Share and more...](#)

To tag a person, you can do three different things. One way to tag a person is to click on the card you want them to see, and then add a comment. When you add the comment, you can type the “@” symbol and then their email address. Or, you can click the “@” symbol manually where it is located at the bottom of the comment box.



The other way is to click the part of the card that says “members.” Start typing in their email address, and add them when they come up.



## Adding deadlines

You can also give cards deadlines. If a certain step in your project needs to be done by a certain date, you can put that date on the card in order to make sure it gets done in time. For example, if there is a hearing about inclusion in school, you might need to prepare your groups' testimony by a certain date. You can make the card remind you about when the date is.

The screenshot shows a Trello card interface. At the top, the card title is "Tasks to do before then" with a close button (X) in the top right corner. Below the title, it says "in list Legislative hearing just scheduled today, 2/2/16, for 2/23/26".

The "Due Date" section shows "Feb 19 at 12:00 PM" with an "Edit the description..." link below it.

The main content area features a checklist titled "Testimony draft" with a "Delete..." link. The checklist items are: "Testimony outline", "Full draft of testimony", and "Practice session". A progress bar shows 0% completion. Below the checklist is an input field "Add an item..." with an "Add" button and a close button (X).

The "Add" sidebar on the right includes: "Members", "Labels", "Checklist", "Due Date", and "Attachment".

The "Actions" sidebar on the right includes: "Move", "Copy", "Subscribe", and "Archive".

Below the checklist is an "Add Comment" section with a text input field "Write a comment..." and a "Save Comment" button. The input field has a "KM" user icon on the left and icons for attachments, mentions, emojis, and a link on the right.

The "Activity" section at the bottom shows two recent actions by "KIT MEAD": "added Testimony draft to this card a few seconds ago" and "added this card to Legislative hearing just scheduled today, 2/2/16, for 2/23/26 2 minutes ago".

To give a card a deadline, click on the card and then click on “due date.” Click a button and then click “save.”

**Due Date**

Change Due Date ×

**Date**  **Time**

[Prev](#) [February 2016](#) [Next](#)

Su	Mo	Tu	We	Th	Fr	Sa
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29					

[Enable the Calendar Power-Up!](#)

You'll get a calendar view of your cards and

## Adding checklists

The last thing you can do with a card is make a checklist. This is useful if there are a lot of parts of a step or an idea that you need to keep track of. For example, before the Georgia self-advocacy organization can go to their legislative meeting, they need to make sure they are prepared. On the card for the meeting, they can create a checklist of everything they need to do before the meeting. As they do things, they can cross each item off, so they can see what has been done and what still needs to be done.

The screenshot shows a Trello card titled "Progress made before meeting" within a list named "Legislative meeting 2/19/16". The card has a description "Edit the description..." and a "to do list" section. The checklist is currently 0% complete and includes the following items: Elevator speech, Fact sheet, coalition letter, and practice session. Below the checklist is an input field "Add an item..." with an "Add" button. The card also features a comment section with a "Save Comment" button and an activity log showing recent actions by "KIT MEAD". On the right side, there is a sidebar with "Add" options (Members, Labels, Checklist, Due Date, Attachment) and "Actions" (Move, Copy, Subscribe, Archive), along with a "Share and more..." link.

**Progress made before meeting** in list **Legislative meeting 2/19/16**

[Edit the description...](#)

**to do list** [Delete...](#)

0%

- Elevator speech
- Fact sheet
- coalition letter
- practice session

**Add**

**Add Comment**

**KM** Write a comment...

**Activity**

- KM** **KIT MEAD** added to do list to this card a few seconds ago
- KM** **KIT MEAD** added this card to Legislative meeting 2/19/16 a few seconds ago

**Add**

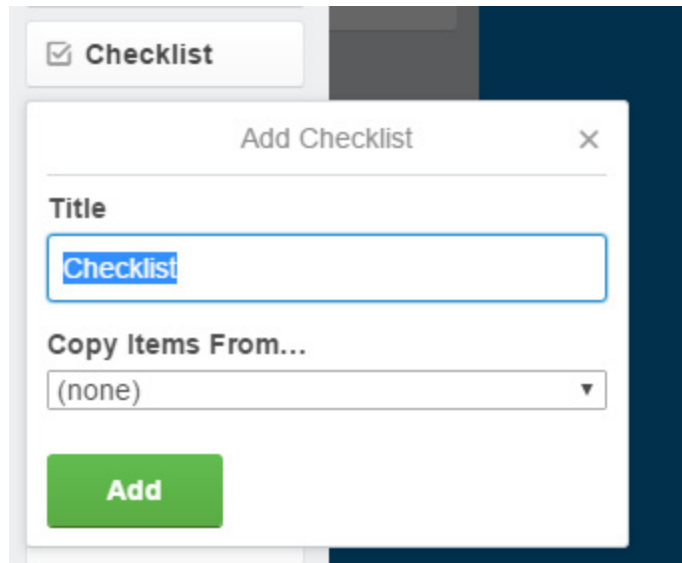
- 
- 
- 
- 
- 

**Actions**

- 
- 
- 
- 

[Share and more...](#)

To add a checklist to your card, click on the card you want and then click “checklist.” First, you will have to give your checklist a title. Then, you will be able to type in each item on the checklist you want. After you type in an item, click “add” to move on to the next one.



Checklist

Add Checklist ×

Title

Checklist

Copy Items From...

(none) ▾

Add