University of Pennsylvania
ScholarlyCommons

Scholarship at Penn Libraries

Penn Libraries

2-28-2018

App Review: Trello

Amanpreet Kaur
University of Pennsylvania, amankaur@upenn.edu

Follow this and additional works at: https://repository.upenn.edu/library_papers

Part of the Library and Information Science Commons

App Review: Trello

Abstract

This article focuses on using Trello, a collaborative project management tool.

Keywords

project management, collaboration

Disciplines

Library and Information Science

App Review: Trello

Amanpreet Kaur

Published online: 28 Feb 2018.

Submit your article to this journal ☐

View related articles ☐

View Crossmark data ☐

Routledge
Taylor & Francis Group

Check for updates

TECHNOLOGY

App Review: Trello

Amanpreet Kaur

Biomedical Library, University of Pennsylvania, Philadelphia, Pennsylvania, USA

Introduction to collaboration and project management tools

The futurist Alvin Toffler popularized the term *information overload* to describe the concept of the increasing difficulty in managing the sheer amount of data and information inputs and sources encountered in one's personal and business life. Information overload does not solely apply to the problems being grappled with by library users who come to our desks and offices daily asking us for help finding, evaluating, and organizing the information they need to guide decisions in policies and procedures, administration, and treatment. On a daily basis, library and information science professionals themselves are also overwhelmed by the emails, phone calls, and patron requests they receive; committees on which they serve; and projects and services they are developing with colleagues in and out of the library.

Librarians are often viewed as the experts in the organization of information, so it is ironic that librarians are also struggling with information overload. Luckily, for us, there are a number of Web-based collaboration and project management tools that librarians can use to help stay organized, compile information resources, instantly communicate updates with colleagues, and collaboratively track tasks on multiplying to-do lists.

Librarians working on interprofessional projects may have encountered the following software, more and more of which are available as applications (apps).

- **Atlassian Trello**: Atlassian Trello is a project management tool in which you can create personal or group boards using a list and card system.
- **Atlassian JIRA**: JIRA is also an Atlassian product. It is a project management tool that is geared towards software development. Librarians may encounter JIRA when collaborating with IT staff and software developers.
- **Microsoft OneNote Staff Notebook**: Microsoft OneNote Online is a digital note-taking app within the Microsoft Office 365 Suite. Staff Notebook is designed to enable collaboration amongst colleagues. Essentially, staff share a digital notebook to keep track of collaboration.

- **Microsoft Planner**: Planner is also an app within the Microsoft Office 365 Suite. Within Planner, collaborators can create buckets of to-do lists. Within these buckets, tasks are created and assigned to a team member.
- **Zoho**: Customer relationship management software with unlimited projects and users, but restricted to 10 MB of online storage.

This app review will focus on the free version of an Atlassian product called Trello, a collaboration and project management tool that can help librarians manage individual and group to-do lists and communications. Trello is a visually appealing way to organize to-do lists, workflows, and guides, and has a lower learning curve than the previously mentioned collaboration and project management tools.

Kanban in a nutshell

Like many off-the-shelf online project management tools, Trello has its origins in the transformative work of Toyota's continuous improvement guru, Taaichi Onoh, and his colleagues. They have created a digital version of the highly effective kanban system, a note card-based guidance and optimization workflow process. Kanban is a simple and elegant system, but to use these tools most effectively, it is useful to have a basic knowledge of the principles beneath the interface.

Kanban boards break down all of the necessary steps needed to accomplish a project into cards- originally actual note cards written on by team members and passed along with inventory or manufactured items at each stage of the production process. It describes each specific work item, who is responsible for completing it, its timeline and current status, and any other related and necessary information. Each card, now in digital form (although hospital librarians in excessively lean resource environments or those who prefer tangible tools might consider an actual notice board and cards) is arranged in a timeline based on the expectations of the project team and the dependencies of each task within the whole project.

Individual team members are assigned to tasks that need to be worked on or completed in order to move the project forward, with future tasks in a to-do backlog, which are picked up or assigned as tasks are completed and team members become available. Limiting the amount of tasks-in-progress by ensuring they are assigned to team members available to work on them, avoids bottlenecks and ensures continuous progress. Trello and similar tools virtualize and simplify this process in an easy-to-manage, visual tool.

What is Trello?

Trello is a Web-based collaboration and project management tool available in three versions: Free, Business Class, and Enterprise. The Business Class and

Enterprise versions of Trello offer an expanded set of features. This review discusses only the features available in the free version.

Trello is organized as a kind of virtual notice board, where one can place notices for particular tasks and key benchmarks for different projects to create a timeline or to-do list, and then update, manage, and move the notices around as the project progresses. Within Trello, one can create multiple personal and group boards to keep track of items and updates using lists and cards that can be moved across the screen.

For example, a Trello board can be used to keep track of ideas during a brainstorming session. The vertical lists represent categories in which the cards are organized (Figure 1).

In this example, a Trello board is used to organize a collaborative project. In this instance, there are two different ways to organize information. **Barbara's To-Do List** represents tasks to be completed by an individual team member (Figure 2). Other lists are broken in parts of the project. One can add color/patterned labels, due dates, and checklists as well as links, images, and YouTube videos to the comments section within the cards. Within group boards, users can assign cards to one or more individuals and tag group members in comments (Figure 3).

Each individual has total control over how to organize the boards, lists, and cards making Trello a flexible tool that can fit the users preferred workflows. After completing a task, it can be archived, deleted or moved to a *Done* list.

In this example, cards move across an instructional design workflow (Figure 4). Hospital librarians may be interested in using this style of organization to track progress on systematic review projects. As the tasks are completed, the corresponding cards are archived. Within Trello, archives are searchable, so one can always view them again.
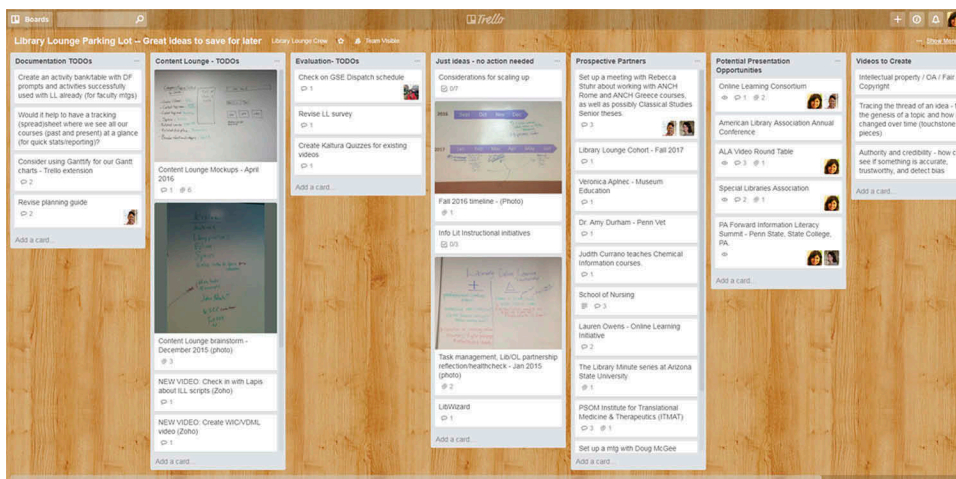

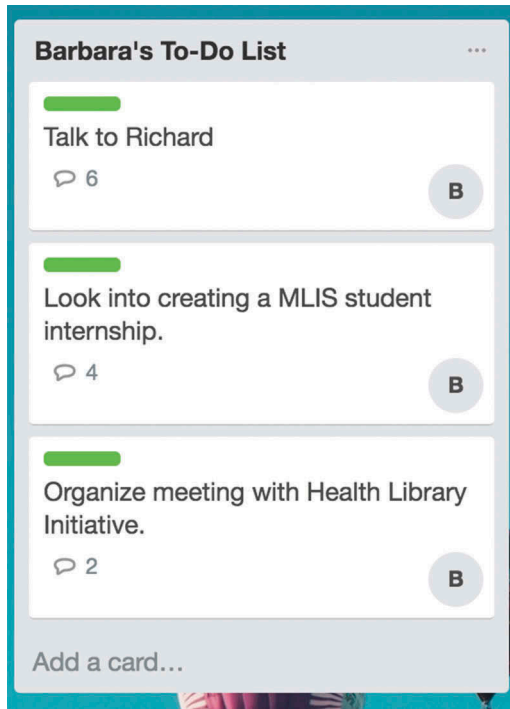**Figure 1.** Trello board organizing a collaborative project.
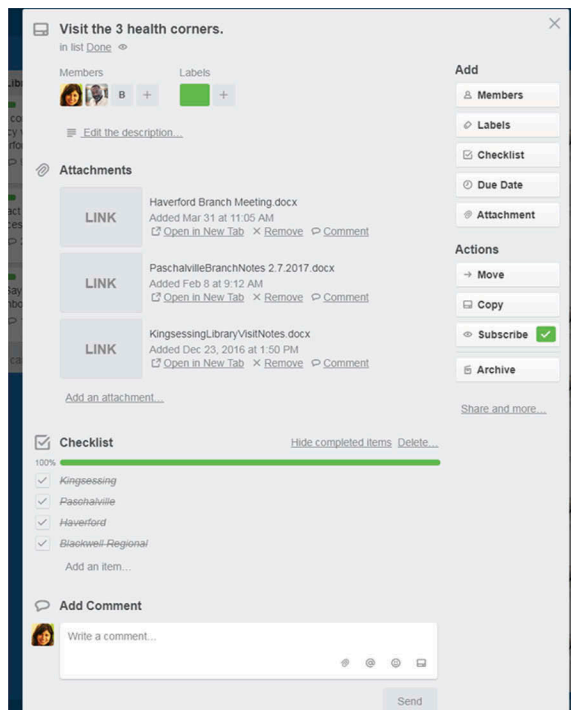
Figure 2. Barbara's To-Do List.
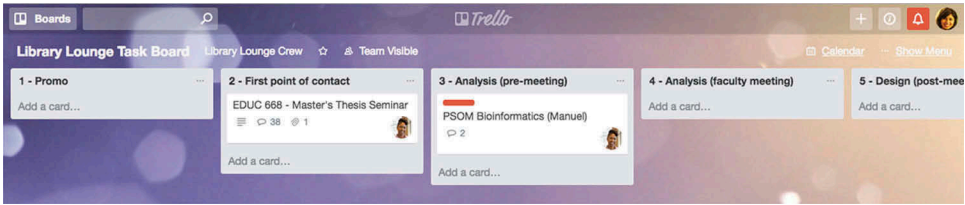

Figure 3. Trello card.

Figure 4. Trello instructional design workflow.

In the following example, a team is creating a video tutorial on the ExamMaster NCLEX software and sharing this with nursing students. Within Trello, there is a **MEETING NOTES** for agendas and notes, **TODO** list for upcoming tasks, **DOING** list for tasks that people are working on, **WAITING ON OTHERS** list for tasks that require action of colleagues outside of the team, and **DONE** list for completed tasks. This allows a team to visually see what has been discussed, planned, actively engaged in, waiting for, and accomplished (Figure 5).

For group boards, be sure to discuss group expectations for using Trello. Will tasks move around the board? Will tasks be deleted or archived? How often is the individual group planning to update assigned cards? Setting and agreeing up group norms will help the team use Trello more effectively. Keep in mind the group norms may vary from project-to-project.

Applications in hospital libraries

Hospital librarians can use Trello within the library and with hospital staff as well as in external collaborations with colleagues across the health care system, professional associations, and other outside organizations. For
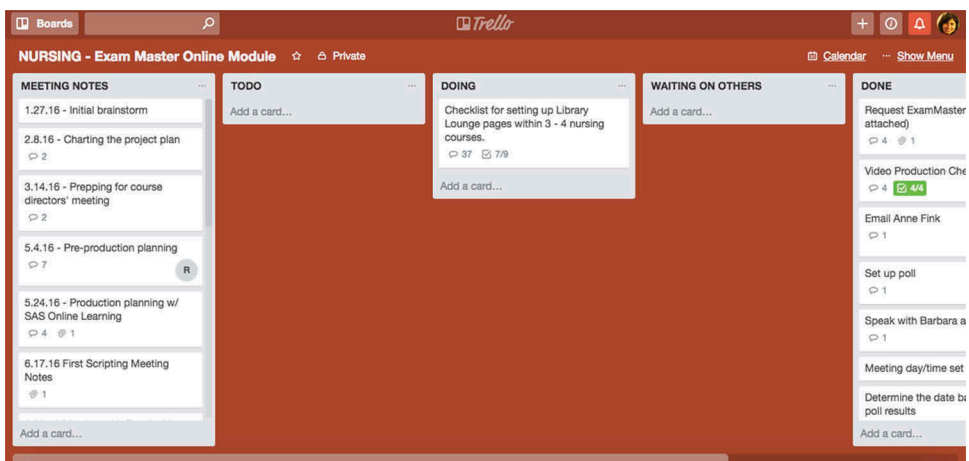

Figure 5. Trello board for the exam master online module.

example, Trello can be used to keep track of tasks associated with a systematic review team. If the Trello board is dedicated to a single systematic review project, the lists can represent the various phases of the systematic review process and the tasks represent the to-do list items. If librarians would like to keep track of all systematic reviews going on, they might make a Trello Board, in which a list can represent a different stage of the systematic review process, and each card can represent a systematic review project.

Trello is also available as an app for smartphones and tablets, so one can keep track of projects and tasks on the go. The hospital librarian can also use Trello to create free publicly viewable boards with lists of resources and other helpful information geared towards specific audiences, similar to research guides that librarians often create using Springshare's LibGuides. In order for the communities to access publicly viewable boards, librarians must share the Trello board URLs.

For example, within the publicly viewable Digital Fluencies Trello Board, library staff can learn more about the various digital fluencies along with contact information, lesson plan ideas, workshop information, etc. (Figure 6).

Hospital librarians may choose to create publicly viewable Trello boards for professional development resources geared towards health care professionals, consumer health information for patients, and resource lists tied to hospital events or public awareness campaigns.

Trello is also an easy-to-use project management tool for external collaborations such as conference planning committees, professional organizations, etc. For example, a team planning one or more events can use Trello to split tasks among team members, add deadlines to tasks, keep track of the completed tasks, reassign and reorder task members and timelines on the fly, and update the progress on task cards. Trello makes it easy to visually see

Figure 6. Trello publicly-viewed board.

who needs to do what, when those things need to be done, and what has already been done.

Conclusion

Trello is a Web-based tool that can make it easier for hospital librarians to collaborate and manage projects within and outside the library and hospital. The free version of Trello has features that are useful to library and information science professionals and with those who collaborate with LIS professionals. Go to trello.com to try out Trello yourself.