

## COS SMW Scutari Strategy Group

### Instructions for Using Trello

#### What is Trello?

Trello is a group collaboration tool for managing and coordinating a series of small tasks through a group-defined, custom process.

#### Why Trello?

Easy to learn /use. Free.

#### Secure?

Nothing on the Internet is 100% secure. The group is "Private". You have to be invited to see the content. Only Admins (Norman, Scott and Gordon) can add new users. The owners of Trello could possibly see our content. So what -- our content will be published publicly anyway.

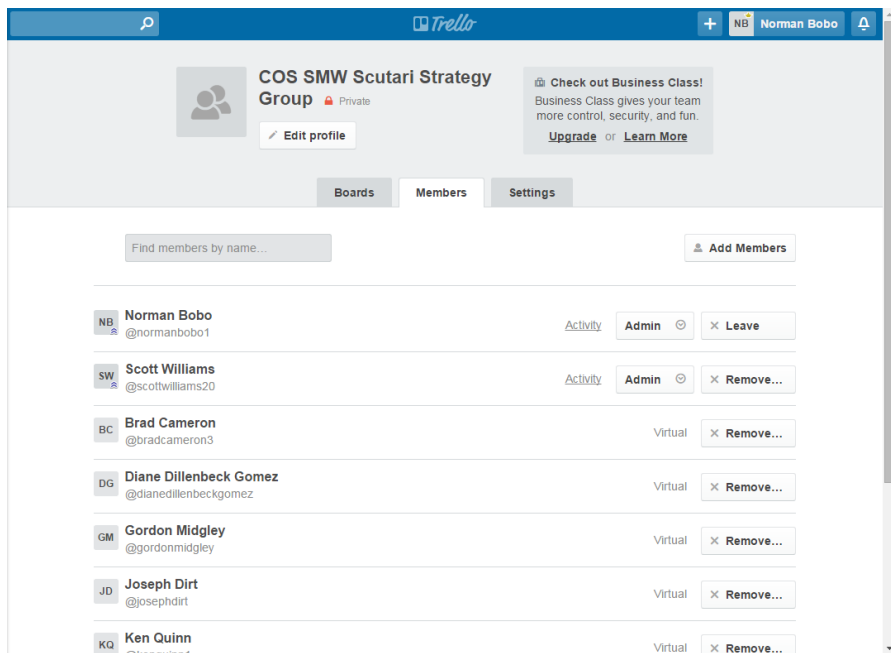
#### How does Trello work?

Trello consists of:

- 1) Organizations
- 2) Users
- 3) Boards
- 4) Lists
- 5) Cards

**Organizations:** a group of users. The organization is created by an admin. The admin then invites users to the organization.

Here is the Organization page of the COS SMW Scutari Strategy Group:



**Users:** User Id's are Trello-wide -- you can participate in organizations and boards from other groups as well as this group. Users are identified uniquely within Trello by e-mail address.

**Creating user ids:** When an Admin adds a user to a community or a board, they do so by typing in an e-mail address. If that user has been on Trello before, Trello simply adds that person to the organization.

If that e-mail address has not been used before anywhere within Trello, the system will create a new "virtual" user id and send the user an invitation via e-mail. When the user replies to the invitation e-mail, they will become a full user.

**Trello handles:** Trello creates a user "handle" similar to Twitter handles. Trello creates the handle based on either the e-mail address or the user's name that is typed in which the user is first invited. Norman Bobo's Trello handle is @normanbobo1.

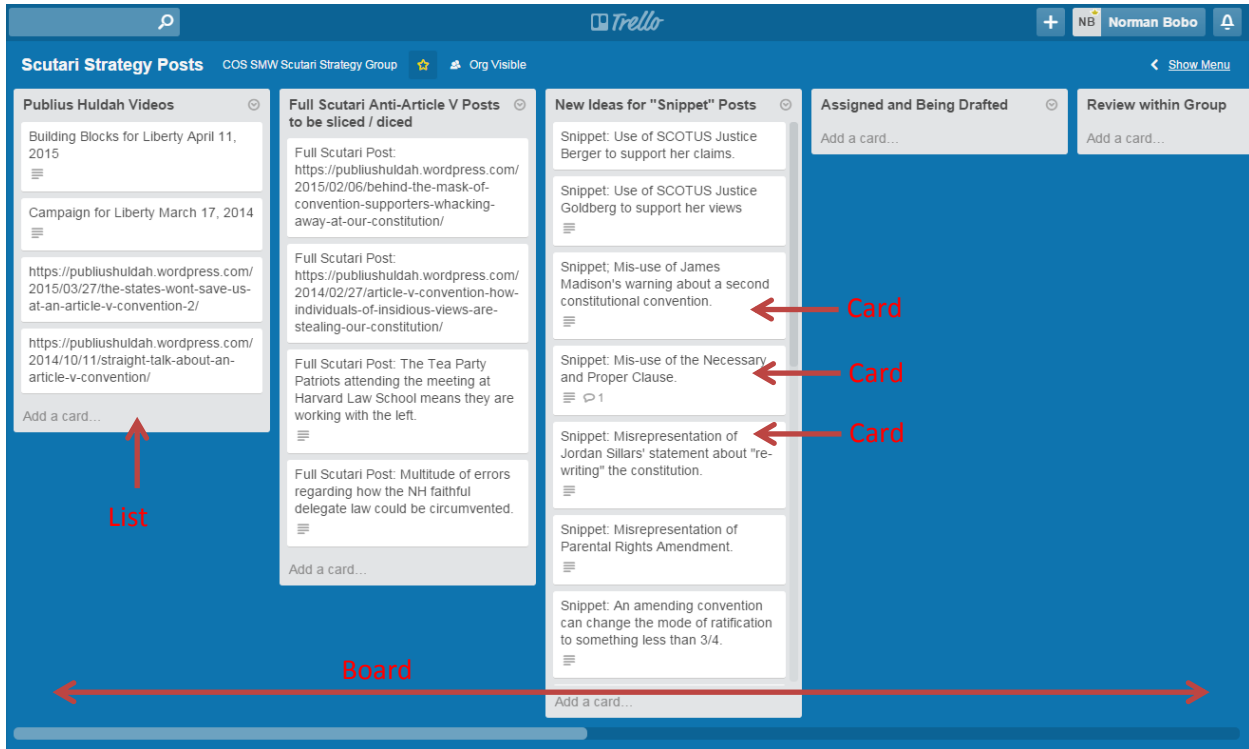
### **Boards, Lists and Cards**

Trello organizes your work into Boards, Lists and Cards.

A Board is a group of lists. As of this writing, the "COS SMW Scutari Strategy Group" organization has only one board, "Scutari Strategy Posts".

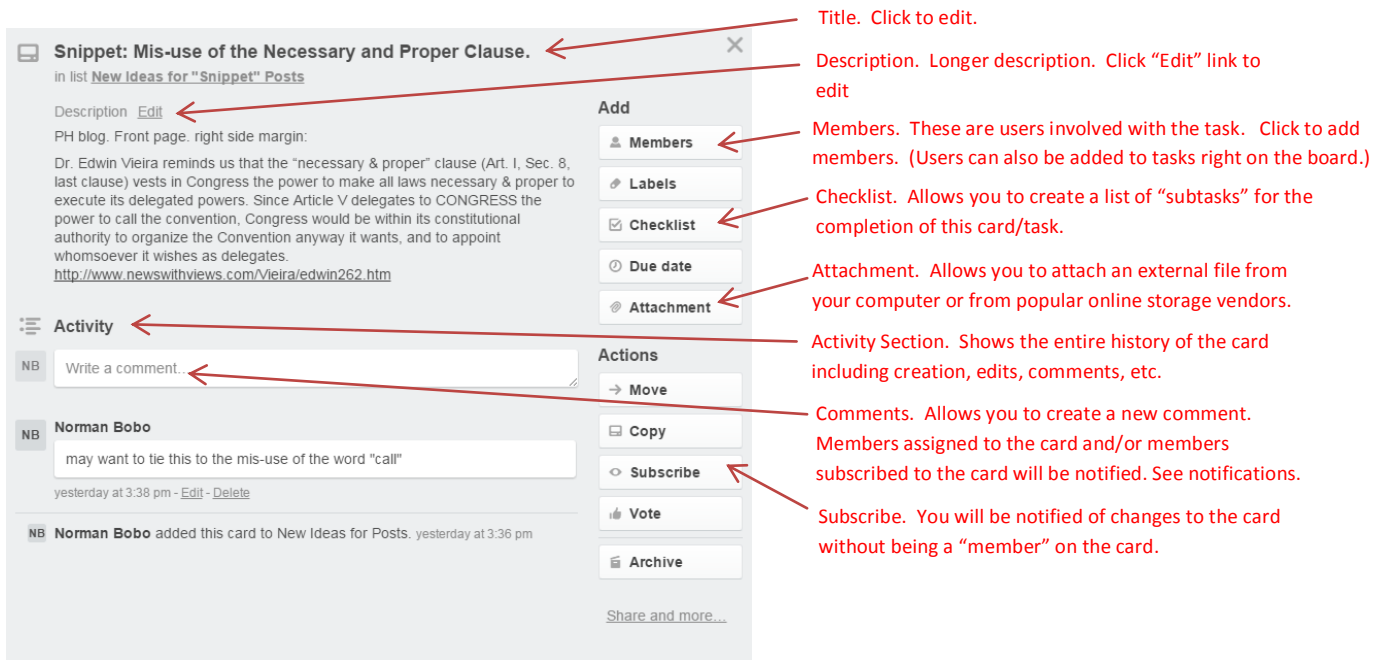
A list is a group of cards.

A card is a single task. See the screen shot below:



A board should be thought of as a process or a set of tasks. The lists are the steps in the process. Cards are tasks/deliverables which move through the lists on a board as they move through the process.

If you click on a card, you will get a screen like the following:



To move a card from one list to another, simply drag the card on the screen to the other list. Moving a card from one list to another signifies that the deliverable has moved from one step in the process to another.

For our group, the “Scutari Strategy Posts” board is the “factory process” by which we will go from ideation to drafting to review to publishing of posts.

As of this writing, here are the lists / tasks on the board. Adding / removing / changing lists and cards is extremely quick and easy. Thus the set of lists may vary from time to time from this “draft” process.

**List: Publius Huldah Videos.** Videos which need to be countered. We need to figure out how to capture these and edit them with a speaker responding to each statement.

**List: Full Scutari Anti-Article Posts to be sliced / diced:** Full posts for which we will write line-by-line, phrase-by-phrase rebuttals.

**List: New Ideas for “Snippet” Posts:** These are ideas for short/pithy and easily consumed snippets countering clear and obvious incorrect statements.

**List: Assigned and Being Drafted.** Cards from any of the prior lists are assigned to one of the group members and then dragged to this list while that member is working on the post. The contents of the counter post should be either copied and pasted in to the description or, if in another document, can be attached to the card.

**List: Review within the group:** When a counter-post has been drafted, it is moved to this step where other members of the group can review and comment. The original author will review / modify based on the comments. The author must then get at least three members of the group to comment with “approved” to indicate the post is ready to go.

**List: Review by COS Leadership:** After the internal review (and three members giving approval), the post is sent to a member of the COS Leadership for review / approval. As of this writing, Gordon Midgley is representing the leadership in this capacity. Others can be added if needed. When the post is approved, the COS leader will move it to the next step.

**List: Approved to Post.** This is the “backlog” of posts which are approved and ready to be posted. As of this writing, we need to figure out how we will distribute / publish the posts. When a post is published, a link to the post should be added to the description area of the card.

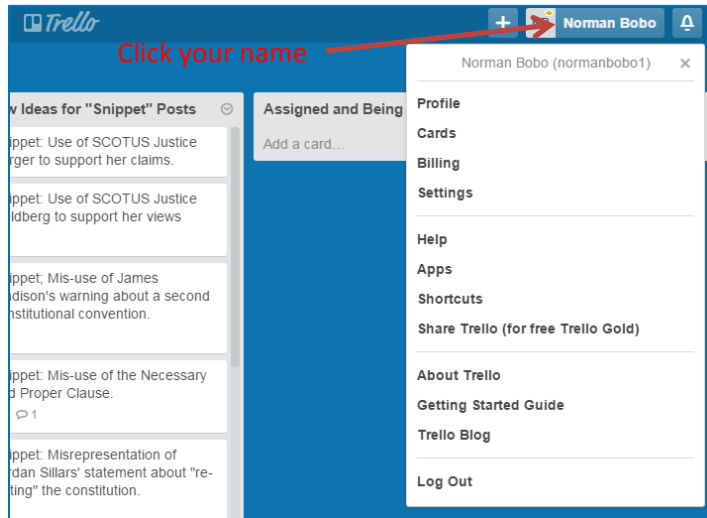
**List: Potential Outlets:** This is a simple reference list of potential online outlets on which the posts can be published. Cards for posts should not be placed in this list.

**List: Posted:** This is the list of completed posts.

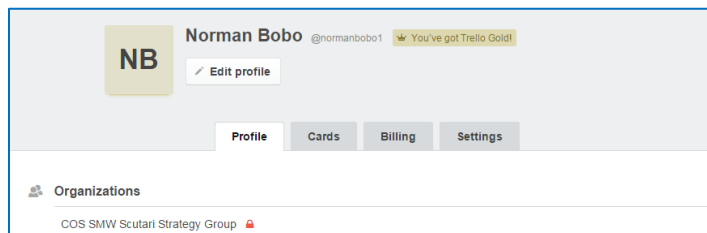
## Setting up Your Profile:

Your profile contains some settings you may wish to review / modify.

To access your profile, click your name in the upper right corner:



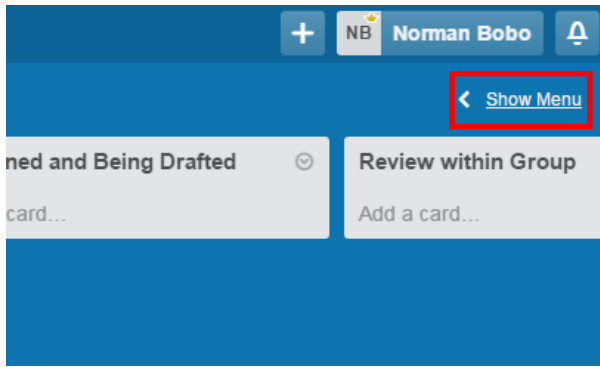
To modify your identification information, click "Profile". You will get a screen like the following:



Click the Settings tab and make any changes you wish, including the "Change Notification E-mail Frequency" setting, which determines how often you receive e-mails about changes to the cards on which you are assigned or to which you have subscribed. If you choose to completely turn off e-mails, you can see notifications within the product by clicking the alarm bell icon next to your name.

## Open / Close the Menu to Add users to Cards on a Board

Click "Show Menu" on the upper right corner under your name, as shown below.



The menu will appear as follows. You will see the list of avatars for each member assigned to the board. In this picture the avatars are mostly the default of the member's initials. To associate a member to a task, you can drag the member icon to a card.

