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Project Management and Trello

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Project Management and Trello

Josh Morgan, June 2020

Outline

- Basics of PM
 - Project planning
 - Documentation
 - Communication
 - Timelines
 - PMs
- How Trello can help
 - Documentation
 - Communication
 - Timelines
 - PMs

Project planning

- Why - are you doing this project (goal)
- How - are you going to accomplish the project? (scope)
- Who - is affected (stakeholders); will be doing the work (staffing needs)
- When - scheduling timelines and meeting deadlines
- Where - will this plan live? Who will keep it updated? How will decisions be documented?
- What - are going to be the pain points?

Documentation

- Project plan/charter
 - Lays out previous slide's questions
 - Changes and decisions made
 - Staffing needs and time commitment
 - Logistical needs
 - Equipment and software needs
- Workflow
- Document methods and steps
- Find a place for the documentation to live. Make sure it's in a ubiquitous format, such as PDF or Word doc, and that it is accessible to colleagues current and future (shared unit/team Box or other cloud storage).

Communication

- Meetings are important, whether daily, weekly, or monthly (depending on the project). A team needs to stay connected and have shared ownership of a project to be successful.
- Determine your communication methods for daily tasks, decisions, and general meetings at the start of a project.
 - Chat - daily tasks
 - Email - decisions
 - Zoom/Teams/WebEx - meetings (don't forget to take minutes!)

Timelines

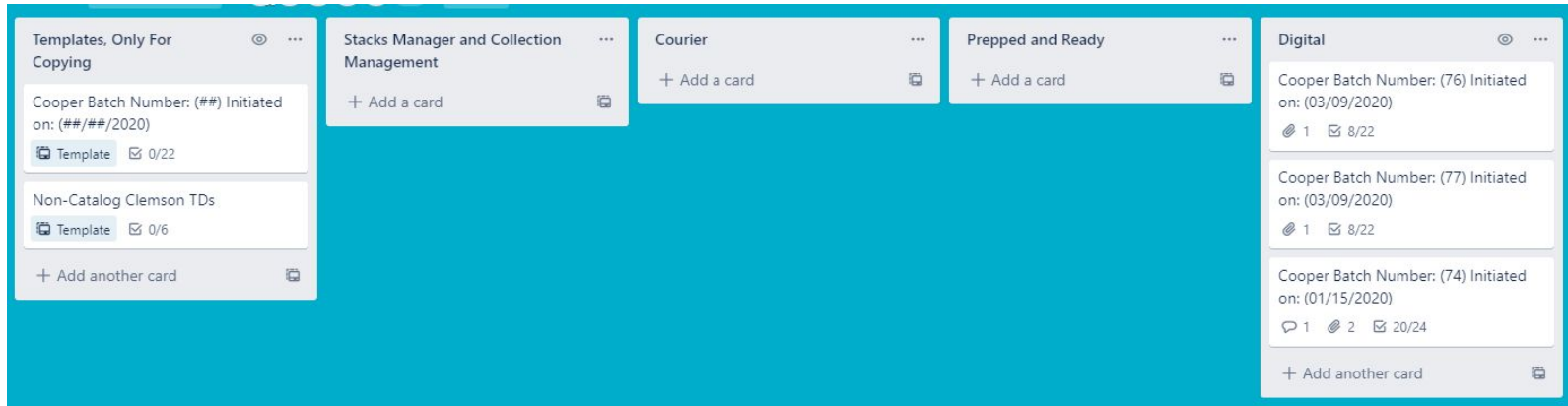
- Deadlines are usually given to you by a supervisor or determined by the group, so work backwards from there and establish dependencies.
 - Eg, Migration to Alma requires clean data in a certain format from Millennium. How long will it take to clean that data? How long will it take to compile data into compliant format?
- A pilot or test run will likely be needed to set your timeline.
- Target dates move based on pain points/constraints identified beforehand and encountered in process.
 - What would JOMO look like if COVID-19 had occurred during that project?

Project Manager(s)

- Point person(s)
- Translator
- Does not need to be certified
- Knows all aspects of project and where every step is in the process
- Conduct process evaluation and feedback sessions: What's working? What's not?

Project planning with Trello

- Kanban style – cards moving across a set of processes (lists) towards completion.
- Each card represents one or multiple tasks
- Integrations help workflow, such as Gravity Forms add-on with Staffweb other Libraries Wordpress site



Documentation with Trello

- Attach files, local or cloud-based
- Add descriptions
- Create introduction lists, be creative

Series 100 Photographs ua100_006198 - ua100_006520
in list [Scheduling/Delivery to Depot](#)

LABELS

- University Archives +

Description Edit

Collection title: Series 100 University Historical Photographs
Collection description/topics: aerial views of campus, outdoor campus scenes, Convocation 1996, Environmental Engineering, Economics, English, Entomology, Dairy Science,
Material amount: 322 images
Material type: photographs

Attachments

- XLSX** ua100_006198 - ua100_006520.xlsx
Added Jan 14 at 9:34 AM - [Comment](#) - [Delete](#) - [Edit](#)

SUGGESTED

- Join
- [Feedback](#)

ADD TO CARD

- Members
- Labels
- Checklist
- Due Date
- Attachment
- Cover

POWER-UPS

Intro

- All Cooper theses and dissertations spreadsheet
1
- HOW TO USE TRELLO FOR THIS PROJECT
- CONTACT JOSH JMORGA3 ABOUT PROJECT
- SCAN OBSTACLES
- ARCHITECTURE DIGITIZATION NOTES
2
- GUNNIN SPREADSHEETS
1
- SINGLE COPIES
1

+ Add another card

Communication with Trello

- Tag people
- Assign tasks
- Use comments to communicate about specific batches/tasks the cards represent
- If important decisions are made about processes, be sure to document that elsewhere

The screenshot displays a Trello Checklist card. At the top, there is a checklist icon, the title "Checklist", and two buttons: "Hide completed items" and "Delete". Below the title is a green progress bar indicating 100% completion. The checklist contains four items, each with a blue checkmark icon:

- Subseries A Metadata fixes in BISC_Revisions - @hammel3
- Subseries B Metadata fixes in BISC_Revisions - @connormakris
- Connor working on combining spreadsheets
- Image fixes by digilab students in "BISC Image Fixes" (Simone and Tess)

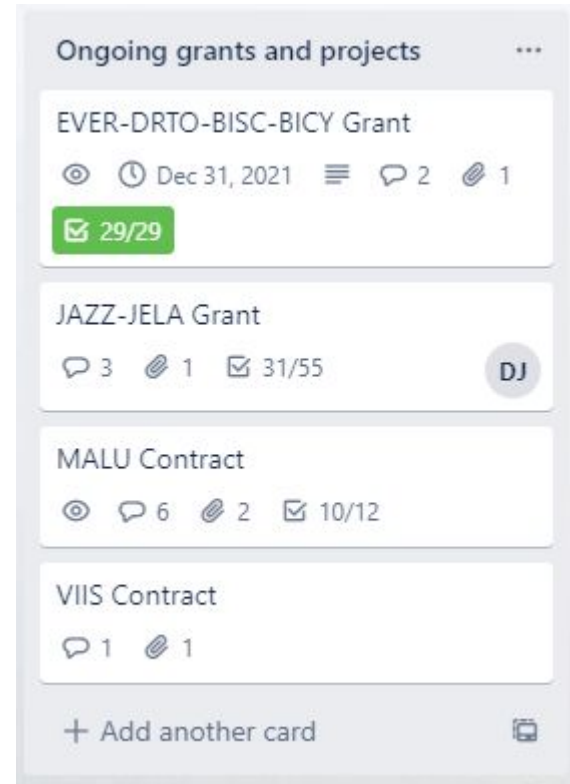
Below the items is a button labeled "Add an item".

The "Activity" section is visible below the checklist, featuring a "Show Details" button and a comment input field with the placeholder text "Write a comment..".

A comment from Josh Morgan is shown, dated "Oct 4, 2018 at 1:13 PM". The comment text is: "@dariusjones Has the lab done any of these fixes? Can assign to Brenton if he finishes scanning before end of pay period." Below the comment are icons for "Edit" and "Delete".

Timelines with Trello

- Set due dates
 - (upgraded version required to assign due dates to checklist items)
- Arrange cards by priority



Project Manager with Trello

- Set yourself to “Watch” board to receive all updates
- Create templates, intro lists, attach plan. Make the board a central place to access all information about a project
- Check-in everyday to view progress and identify stalled processes

Microsoft Planner

- Buckets = Lists
- Task = Cards
- Group by
- Webview has all planners across teams and can filter by just your tasks
- Export to Excel (Trello requires premium to do this)