Research Process Management Tools

**Trello for project management:**

**Setup:**

- Step 1: Use your gmail address or create a new account to sign up at [https://trello.com/](https://trello.com/).
- Step 2: Create a project group there and add another project member in Trello to your created project group.
- Step 3: Once you are in or added to a project group on Trello, join an appropriate board under Boards or create a new board under Boards. To join, click on a board and the option to “Join Board” in the pop-up menu.

**Common usage:**

- Step 0. The project lead creates a board for the project visible to the group on the project group dashboard, and then create four lists (from left to right): Backlog, TODONext, TODO, In Progress, Completed, Accepted.
- Step 1. Any project member creates tasks on the leftmost Backlog list, which includes all the upcoming tasks for the project, and move tasks to be conducted in the week after the next week to the TODONext list and move tasks to be conducted in the next week to TODO.
- Step 2. The project lead assigns each assignable task to specific project member(s), and solicits project members to claim the remaining claimable tasks. In addition, any program member can claim any task still in need of efforts without the solicitation from the project lead. To claim or assign a task, check out our quick tips below.
- Step 3. After a project member starts working on an assigned or claimed task, the project member moves the task from the TODO list to the In Progress list.
- Step 4. After a project member finishes working on an assigned or claimed task, the project member moves the task from the In Progress list to the Completed list.
- Step 5. The project lead (or a team member designated by the project lead) reviews the completed task, and move the completed task to the rightmost Accepted list.

**Quick Tips:**

- Typically, Step 2 happens in a project meeting but can also happen in other occasions or virtually without coordination or via email coordination.
- To assign or claim a task, click on the task and then in the pop-up window, click the right top menu “Add Members” to add a specific member to the task.
- To move a task from one list to another, simply use your mouse to drag it.
- You can add labels (with label names or/and colors), due dates, checklists, attachments for a task. Labels are particularly useful to sort TODO tasks from ones that must be addressed in an upcoming deadline from ones that can be omitted. To see card(s) with a specific label or assigned to specific individuals click on "Filter Cards" under the board menu.
- You can subscribe to a task so that you can receive email updates for activities or comments on this task. You can also subscribe to a list or the board altogether. Subscribing to a list such as the Completed list can be useful to project leads so that they may be notified of new completed items to review.
- You can add comments within a task. In your comments, you can explicitly tag another project member by clicking "@" near the right bottom line of the comment box so that this tagged project member can get email notification for this comment (even if the project member may not be subscribed to this task); note that in order to allow this project member to be tagged, you have to add this project member to be a member of this task.

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**Toggl** as your project time tracker for your project team members, in combination with Trello. Toggl's Chrome extension is nicely integrated with Trello: you can start and stop a timer in a Trello task!

>> How to set up my projects in Toggl?

You can use Toggl on your mobile phones or pads (Android, iOS, Windows) or on a browser to open and use it in your work laptop/desktop!

For your work laptop/desktop, you should install Toggl as a Chrome extension, and then you can start and stop a timer on your Chrome browser. Even better, when you use Trello, after you open a Trello task, you can see a “Start Timer” button/icon below the task title near the top.

You can use your Google account to log in but you can also create a new account there with your preferred email address.
Its free edition (supporting up to 5 team members) shall be sufficient. If you have more than 5 team members, you will get charged with $5 per month.

After you log in Toggl, you can click the "Team" tab near the top to add your teammate's gmail address (from multiple teams if you are involved in multiple projects) to your team.

Then you can click the "Projects" tab near the top to add the names of the projects that you are involved in. Please use a shorthand but informative name for each project such as "PrecondGen".

>> How to track time in my projects in Toggl?

Before you start working on a task item,

- Step 1. click the "Timer" tab near the top
  - [Trello integration] you click the "Start Timer" button/icon below the Trello task title near the top, and then a pop-up dialog shows up
- Step 2. click the "+SELECT PROJECT" in the middle of the bar near the top of the page body, and then select the project that you will work on
  - [Trello integration] you select a project defined inside Toggl in the pop-up dialog
- Step 3. click the tag icon after "+SELECT PROJECT" in the middle of the bar near the top of the page body, and then select/check one of the tags (you can create these tags ahead of time; tags allow you to keep track the types of tasks for the project).
  - [Trello integration] you select a tag defined inside Toggl in the pop-up dialog
- Step 4. type in the text input box labeled as "What are you working on?" with the task name, e.g., one shown in the Trello project board.
  - [Trello integration] in the pop-up dialog, you do NOT need to type in the task name, which is automatically filled by Toggl with the Trello task name
- Step 5. click the "Go!" button near the right side
  - [Trello integration] click a "Done" button near the pop-up dialog
- Step 6. start working ............................................

Immediately after you stop working on a task item, click the "Stop" button near the right side ([Trello integration] you click the "Stop Timer" button/icon below the Trello task title near the top)

>> What if I forget to start or stop the timer in Toggl?

If you forget to stop the timer, you can revise your logged entry in https://www.toggl.com/app/timer by clicking the entry's right end and revising the ending time.

If you forget to start the timer, you can start a "fake" timer and then immediately stop it, and then you can revise this "fake" entry in https://www.toggl.com/app/timer by putting your estimated start time and end time along with the task name.