# Using Trello for Recurring Administrative Tasks

[Trello](#) is a list-keeper that is free (freemium), easy to use, extensible, and robust. I use it for multiple purposes, but here is how I use it to manage the repetitive tasks that go with my job as principal. The following how-to deals with those tasks that recur, often annually, that have smaller pieces to them, many of which don't stick in my head well.
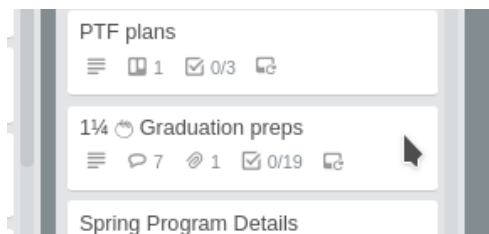
While I've done it primarily for my own benefit, I did have in mind the value of this in the event of my getting hit by the proverbial big truck.

If you're new to administration, or if your own system isn't satisfactory, you may want to read further.

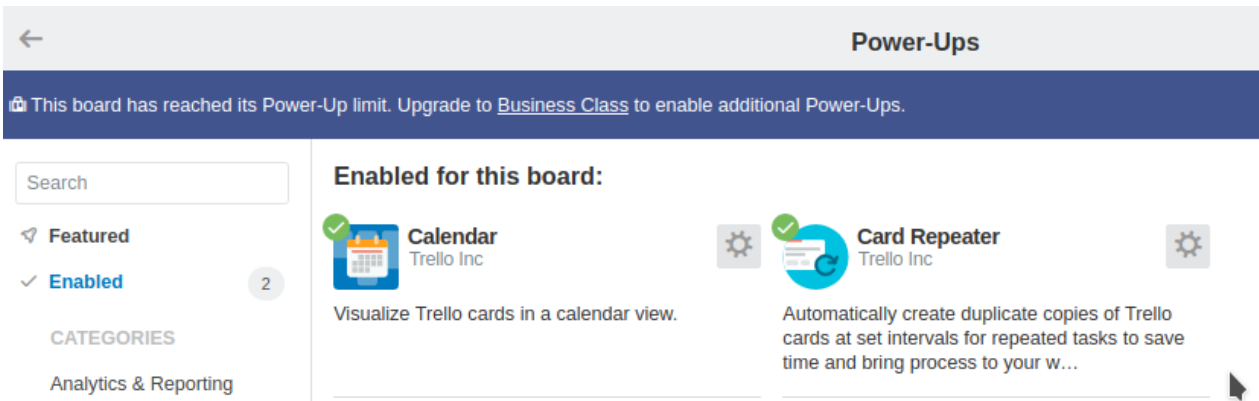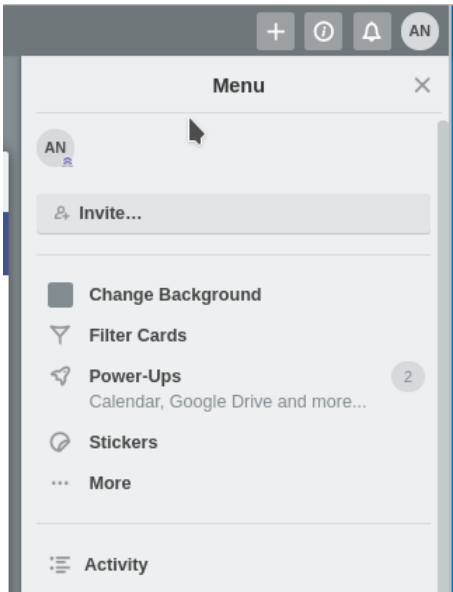<p style="text-align:center">*********************</p>

- I have a list called "Recurring Tasks."
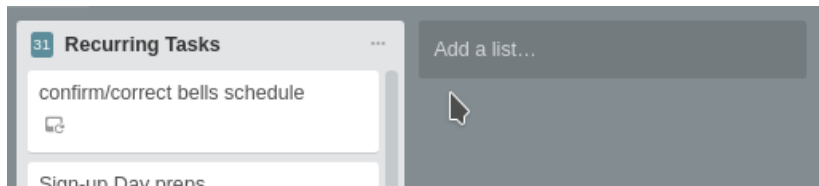
- In that list, I make one card for each general job (e.g., "Graduation Preps").

- I have the Card Repeater Power-Up enabled on this board.

- Using the Card Repeater, I set it to repeat as appropriate (in this case, annually on Jan. 17), and to put the repeated card at the top of my "Do Today" list.

Power-Ups

Repeat

Details

Repeat Card ✕

Repeats
Yearly

On | At
Jan 17th | **12:00 PM**

Prev   January 2019   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	30	31		

Every
Year

List | Position
Started/Do Today | **Top**

You will see this card repeat on January 17, 2019 at 12:00 PM.

If this card is deleted or moved to another board, we'll stop repeating the card.

Save   **Remove**

- If there are important notes that I want to see when I first look at the card, I put these in in the Description.

1¼ 🍅 Graduation preps

in list Recurring Tasks

Next Repeat

January 17, 2019 at 12:00 PM

Description

Edit
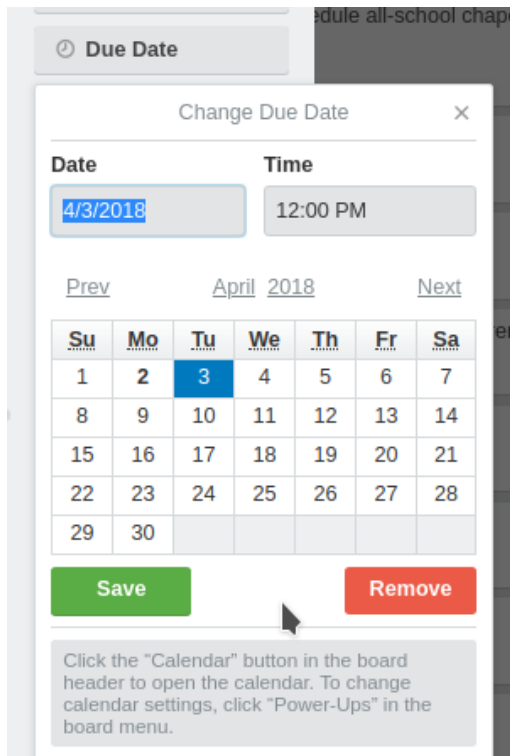
Reset due date for next deadline.

- If I have files that I rely on for the task, I attach them. They get uploaded to Trello (This is for the big truck scenario, so that someone else doesn't have to figure out where I filed it.)

📎 **Attachments**

ODS

Graduation instr, prep schedule, line-up, prev yr data.ods
Added Mar 7 at 3:33 PM - Comment - Delete
⬇ Download

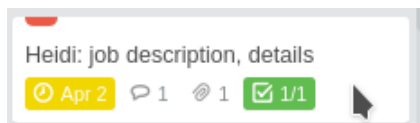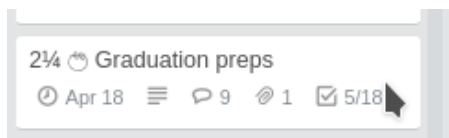Add an attachment…

- I add a checklist for each person involved. On each item in my list, I add a target date.

☑ **A's responsibilities**   Delete…

0%

☐ Confirm reservation for Activity Center [packansas@gmail.com] (Jan)

☐ Get speaker nominations from seniors (Jan)

☐ Approve, contact speaker (Feb)

- When the Card Repeater Power-Up first copies this card into "Do Today," I deal with the item that had the first deadine (January), then set a due date (not the Repeater) for the item with the next due date, and move the card into another list entitled "Waiting."

Due Date

Change Due Date ✕

Date   **Time**

4/3/2018   12:00 PM

Prev   April 2018   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	30					

Save   Remove

Click the "Calendar" button in the board header to open the calendar. To change calendar settings, click "Power-Ups" in the board menu.

- Cards in the "Waiting" column don't catch my eye until the due date turns yellow. Then I promptly and efficiently take care of them so that none of the cards ever have a red due date. [Not! :-)]

2¼ 🕚 Graduation preps
🕐 Apr 18   ☰   💬 9   📎 1   ☑ 5/18

Heidi: job description, details
🕐 Apr 2   💬 1   📎 1   ☑ 1/1
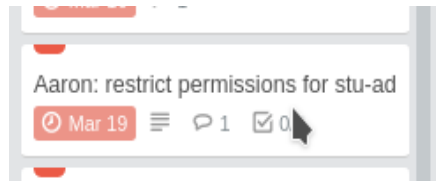
If you start with bare-bones Trello, it won't look quite like these screen shots. I've done quite a bit of tweaking (mostly browser extensions), which I'm willing to pass on to anybody who's interested. But the system that I've outlined works without any extras except the Card Repeater Power-Up.

If you use Chrome/Chromium, one more very helpful thing to tweak with Trello or other apps that you use extensively is to add it (them) to your desktop. I have mine open all the time, and I don't like to go digging through a bunch of tabs in my browser window to get to it.

- Arlyn Nisly