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# Break Out Session
User Group
Best Practices
For Advanced Users

**Best Practices for Advanced Users:**
**Deploying the Wrike Way**

2:30 - 2:50 - Automate workflow by using request forms and project templates in tandem, Extend visibility with dashboards and reports

2:50 - 3:15 - API's and integrations

3:15 - 3:30 - Open Q&A

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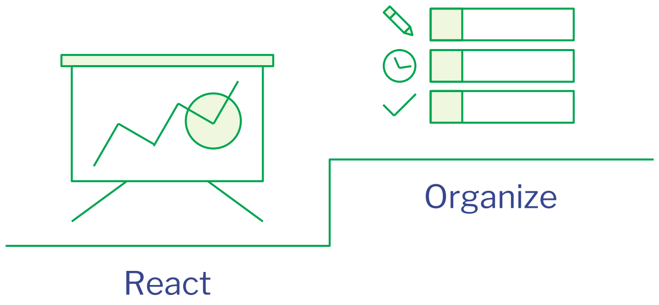
# Deploying The Wrike Way

Samantha Siecke

Professional Services

## React → Organize Assumptions



- Your project work is contained within Wrike (planning)
- You've established project templates and/or custom workflows (workflow)
- You utilize request forms for intake of requests (workflow)
- You've organized your folder structure, allowing for a cleaner workspace (visibility)
- You've greatly reduced the number of emails and brought project and task- specific communication into Wrike (collaboration)

## Best Practices

**Workflow**- Address bottlenecks, then automate and streamline processes to improve throughput and quality.

Automate Workflow by utilizing Request Forms and Project Templates in tandem

# Best Practices

**Workflow**- Address bottlenecks, then automate and streamline processes to improve throughput and quality.

A **Template** is any set of Tasks that are repeatable each time you go through a specific process.

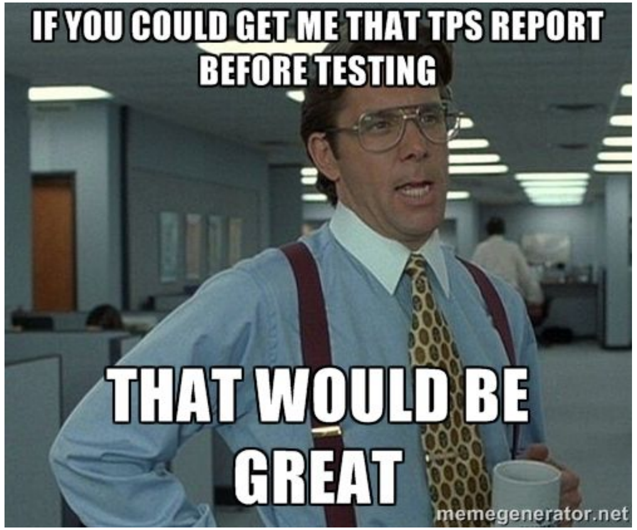
A **Request Form** is a standardized way to gather information & automatically create work in Wrike.

**Together** they can kickoff a workstream, routed intelligently based off of dynamic questions

Wrike
Demo

## Additional workflow automation ideas:

- Mapping Form data to custom fields
- Adding Project & Task prefixes directly from Forms
- Triggering appropriate template based on conditional response
- Increased visibility for requestors; internal & external
- Request Forms available on iOS and Android



## Best Practices

**Visibility**-Enhance and extend reports and dashboards to provide visibility to upper management, key stakeholders, and the full team.

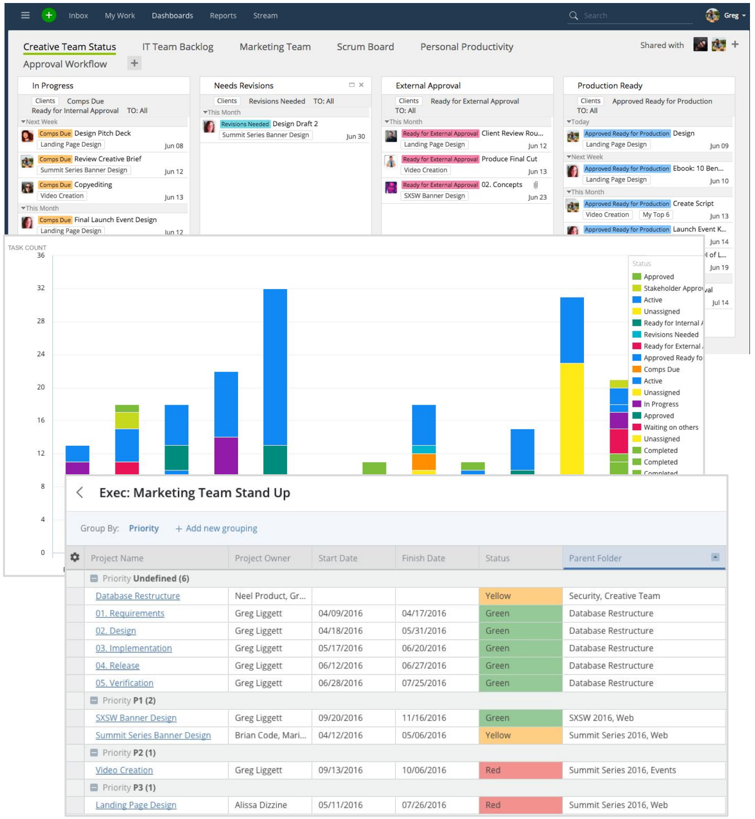
Create Dashboards to drive weekly meetings

Share Report and Timeline snapshots with anyone outside of Wrike

# Dashboards & Reports Best Practices

- All Dashboards & Reports are built on Filters
- Begin by identifying what you want to see, work backwards
- Build purpose-driven dashboards; Project-, team-, process-centric (ex. Weekly Status)
- Let's see it live!

Wrike Demo



Creative Team Status | IT Team Backlog | Marketing Team | Scrum Board | Personal Productivity | Approval Workflow

**In Progress** — Clients Comps Due Ready for Internal Approval TO: All

Next Week
- Comps Due Design Pitch Deck — Landing Page Design — Jun 08
- Comps Due Review Creative Brief — Summit Series Banner Design — Jun 12
- Comps Due Copyediting — Video Creation — Jun 13

This Month
- Comps Due Final Launch Event Design — Landing Page Design — Jun 12

**Needs Revisions** — Clients Revisions Needed TO: All

This Month
- Revisions Needed Design Draft 2 — Summit Series Banner Design — Jun 30

**External Approval** — Clients Ready for External Approval TO: All

This Month
- Ready for External Approval Client Review Rou... — Landing Page Design — Jun 12
- Ready for External Approval Produce Final Cut — Video Creation — Jun 13
- Ready for External Approval 02. Concepts — SXSW Banner Design — Jun 23

**Production Ready** — Clients Approved Ready for Production TO: All

Today
- Approved Ready for Production Design — Landing Page Design — Jun 09

Next Week
- Approved Ready for Production Ebook: 10 Ben... — Landing Page Design — Jun 10

This Month
- Approved Ready for Production Create Script — Video Creation, My Top 6 — Jun 13
- Approved Ready for Production Launch Event K... — Jun 14
- ...l of L... — Jun 19
- Jul 14

**Exec: Marketing Team Stand Up**

Group By: Priority + Add new grouping

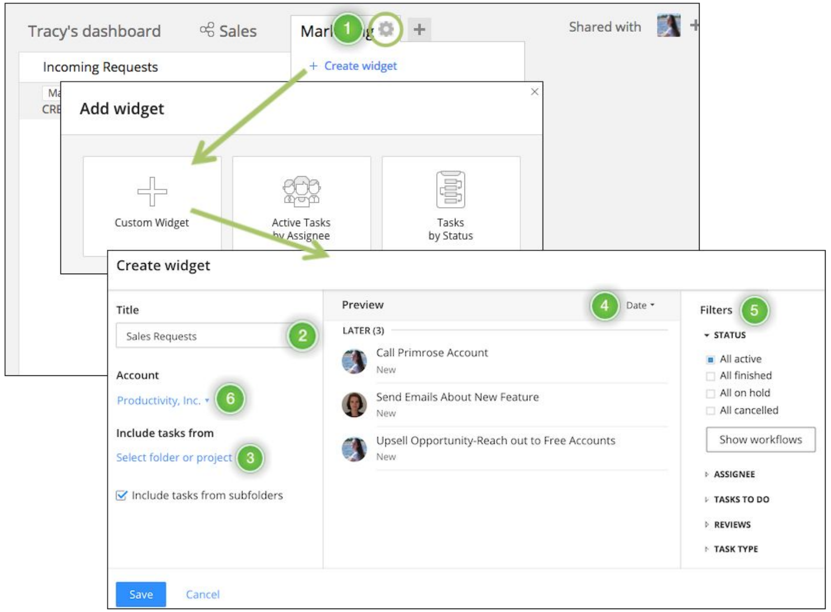
| Project Name | Project Owner | Start Date | Finish Date | Status | Parent Folder |
|---|---|---|---|---|---|
| Priority **Undefined (6)** | | | | | |
| Database Restructure | Neel Product, Gr... | | | Yellow | Security, Creative Team |
| 01. Requirements | Greg Liggett | 04/09/2016 | 04/17/2016 | Green | Database Restructure |
| 02. Design | Greg Liggett | 04/18/2016 | 05/31/2016 | Green | Database Restructure |
| 03. Implementation | Greg Liggett | 05/17/2016 | 06/20/2016 | Green | Database Restructure |
| 04. Release | Greg Liggett | 06/12/2016 | 06/27/2016 | Green | Database Restructure |
| 05. Verification | Greg Liggett | 06/28/2016 | 07/25/2016 | Green | Database Restructure |
| Priority **P1 (2)** | | | | | |
| SXSW Banner Design | Greg Liggett | 09/20/2016 | 11/16/2016 | Green | SXSW 2016, Web |
| Summit Series Banner Design | Brian Code, Mari... | 04/12/2016 | 05/06/2016 | Yellow | Summit Series 2016, Web |
| Priority **P2 (1)** | | | | | |
| Video Creation | Greg Liggett | 09/13/2016 | 10/06/2016 | Red | Summit Series 2016, Events |
| Priority **P3 (1)** | | | | | |
| Landing Page Design | Alissa Dizzine | 05/11/2016 | 07/26/2016 | Red | Summit Series 2016, Web |

# Upcoming and New Enhancements

- Reporting: Calculated Custom Fields
- Dashboards:

  -Preview Screen on custom created widgets

  -Projects can now be added



Title: Sales Requests

Account: Productivity, Inc.

LATER (3)

Call Primrose Account — New

Send Emails About New Feature — New

Upsell Opportunity-Reach out to Free Accounts — New

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# API 101: Automating Success

Adler Chan

Professional Services

## Section Agenda

1. Overview API basics & capabilities
2. Two ways to leverage APIs
3. Q&A

## Pop Quiz: What's an API??

- A) Application Programming Interface
- B) Automated Personal Integration
- C) Automated Programming Itemization
- D) Automatic Pizza Ingestion

## API Has Nothing to Do with Pizza

- **A) Application Programming Interface**
- B) Automated Personal Integration
- C) Automated Programming Itemization
- D) Automatic Pizza Ingestion

## A is for API

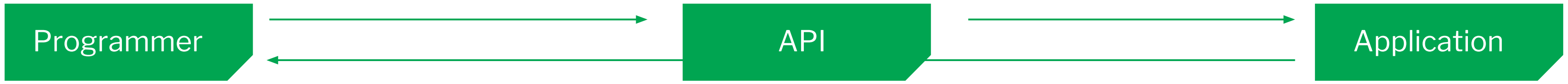
- Application Programming Interface - basically how computer programs talk to each other

- Think of API as a universal translator between applications

- Set of rules that govern how one application can talk to another
    - Embedding a Google Map on Yelp's review pages
    - Embedding YouTube video (with functionality) in another website/application

## What is an API Good for?

- To leverage someone else's pre-built functionality
- 'Integrations' connect existing functionality between programs and are always built on APIs
  - E.g. Wrike's Calendar integrations, 'login with Google+,' etc.
  - Even Wrike's mobile app is built using our API!

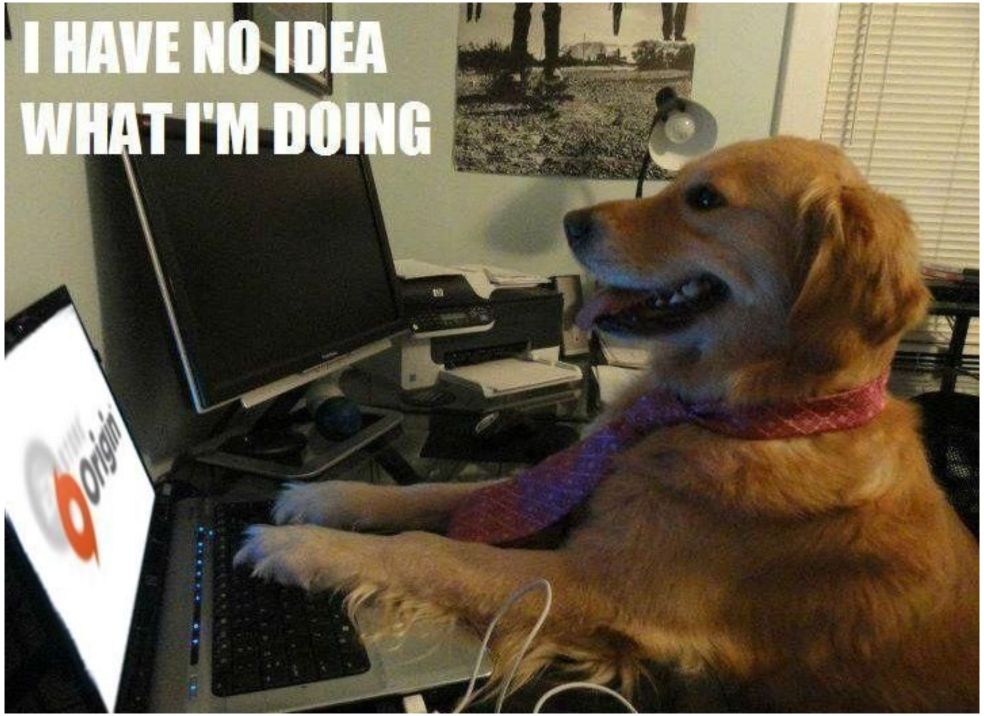


## API: I Just Called to Say...

- APIs are always call & response
  - Calls must conform to defined language
  - Responses depend on the program
    - Objects will be defined by the program
    - Parameters will be defined by the Object

| Action | Object | Parameters |
|---|---|---|
| [POST] - Create<br>[GET] - Read<br>[PUT] - Update<br>[DELETE] - Delete | -Wrike example-<br>/task/<br>/folder/ | -Wrike example-<br>{date}<br>{taskID}<br>{taskStatus} |

## Feeling Lost?



## Two Paths to APIs: Middleware Services vs. Custom Built

Do you have development resources?

- Unfortunately no…
  - No worries—Third-party middleware services can take care of you!

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- Yes, definitely!
  - Awesome! You can get your developers started here:
    - developers.wrike.com

## Two Paths to APIs: Middleware Services vs. Custom Built

Do you have development resources?

- **Unfortunately no...**
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zapier azuqua workato

- Yes, definitely!
  - Awesome! You can get your developers started here:
    - developers.wrike.com

# Integrating Wrike and Typeform: Easy, Peasy

**Wrike Professional Services** uses Zapier to connect Wrike and Typeform so that new deployment survey responses populate new tasks in Wrike

**Scenario:**

- Consultants need client information to help facilitate the conversations in new engagements

**Pain:**

- Sending e-mail questionnaires was not only boring but difficult to track
- Conveying information while collecting information was not possible
- **Super not Wrike-y**

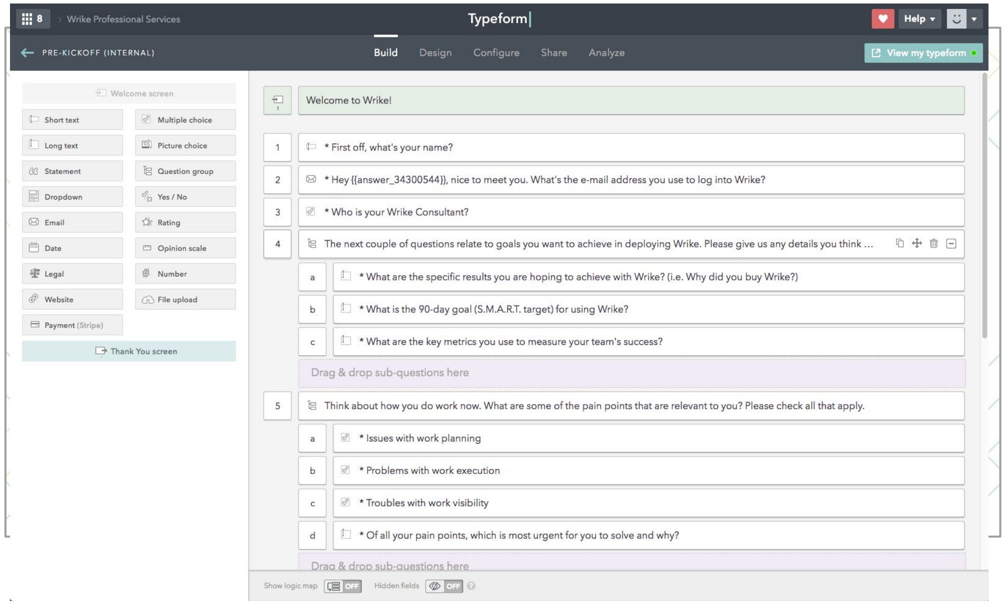
**Solution:**

- Using Zapier, Typeform responses automatically generate a task in a folder within Wrike
- Allowed for integration of survey information to the applicable Wrike project

# Integrating Wrike and Typeform: Easy, Peasy

## Setup Steps

1. **Create Typeform survey**
2. Create Wrike (destination) folder
3. Configure Zapier; when Typeform survey is created → Trigger task creation in Wrike (with results from survey)



Welcome to Wrike!

1 * First off, what's your name?

2 * Hey {{answer_34300544}}, nice to meet you. What's the e-mail address you use to log into Wrike?

3 * Who is your Wrike Consultant?

4 The next couple of questions relate to goals you want to achieve in deploying Wrike. Please give us any details you think ...

a * What are the specific results you are hoping to achieve with Wrike? (i.e. Why did you buy Wrike?)

b * What is the 90-day goal (S.M.A.R.T. target) for using Wrike?

c * What are the key metrics you use to measure your team's success?

5 Think about how you do work now. What are some of the pain points that are relevant to you? Please check all that apply.

a * Issues with work planning

b * Problems with work execution

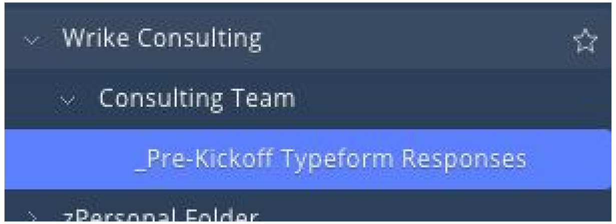
c * Troubles with work visibility

d * Of all your pain points, which is most urgent for you to solve and why?

## Integrating Wrike and Typeform: Easy, Peasy

### Setup Steps

1. Create Typeform survey
2. **Create Wrike (destination) folder**
3. Configure Zapier; when Typeform survey is created → Trigger task creation in Wrike (with results from survey)



# Integrating Wrike and Typeform: Easy, Peasy

## Setup Steps

1. Create Typeform survey
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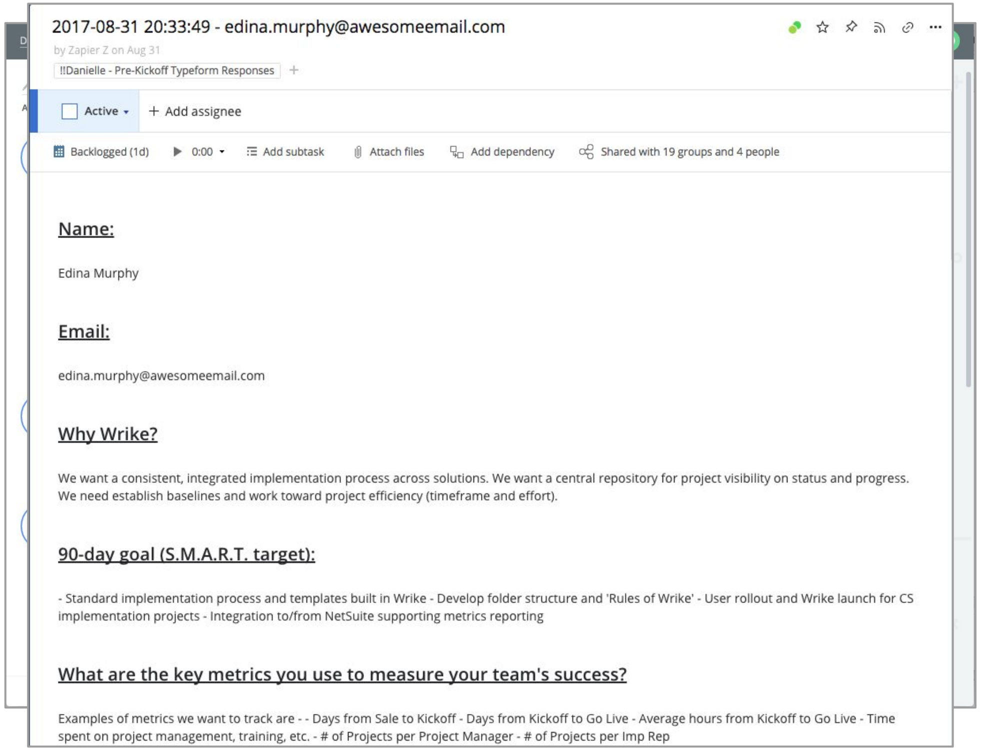
3. **Configure Zapier; when Typeform survey is created → Trigger task creation in Wrike (with results from survey)**



2017-08-31 20:33:49 - edina.murphy@awesomeemail.com

by Zapier Z on Aug 31

!!Danielle - Pre-Kickoff Typeform Responses +

**Name:**

Edina Murphy

**Email:**

edina.murphy@awesomeemail.com

**Why Wrike?**

We want a consistent, integrated implementation process across solutions. We want a central repository for project visibility on status and progress. We need establish baselines and work toward project efficiency (timeframe and effort).

**90-day goal (S.M.A.R.T. target):**

- Standard implementation process and templates built in Wrike - Develop folder structure and 'Rules of Wrike' - User rollout and Wrike launch for CS implementation projects - Integration to/from NetSuite supporting metrics reporting

**What are the key metrics you use to measure your team's success?**

Examples of metrics we want to track are - - Days from Sale to Kickoff - Days from Kickoff to Go Live - Average hours from Kickoff to Go Live - Time spent on project management, training, etc. - # of Projects per Project Manager - # of Projects per Imp Rep

## Integrating Wrike & Salesforce… WITHOUT DEVELOPERS

**Online Marketplace/Hospitality Service Company** used Azuqua to connect Wrike and SFDC so that new requests from SFDC kicked off new tasks in Wrike

**Scenario:**

- With the new creation of Experiences, creative resources & approvals need extremely close tracking

**Pain:**

- Huge number of Experience host requests, difficult to keep track
- Approvals from photo agencies, design agencies, lawyers, & hosts
- **They broke Google Sheets**

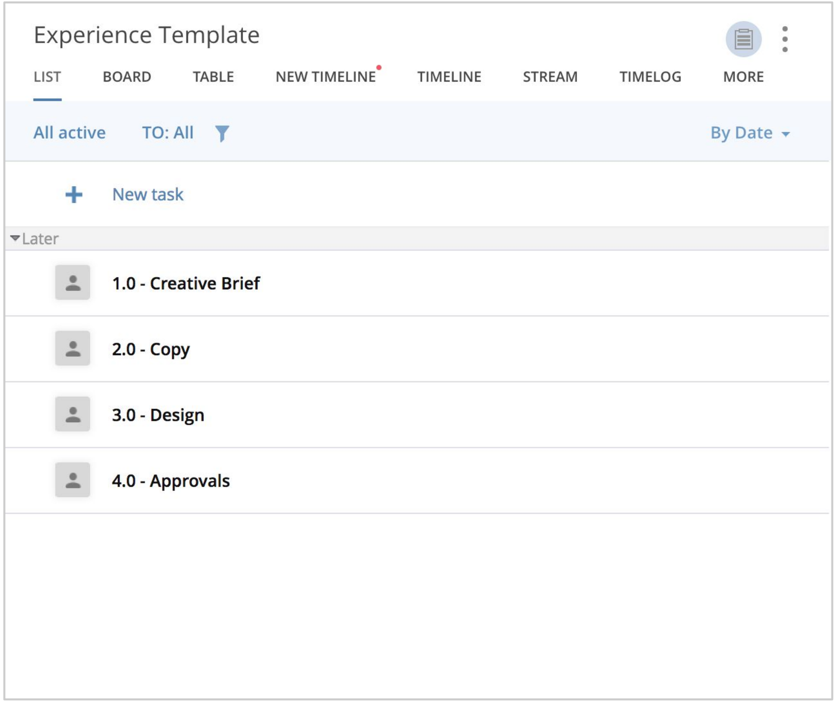
**Solution:**

- Using Azuqua, initiate an entire Wrike template directly from Salesforce
- Kick back and let Wrike's custom statuses organize everything from there

# Integrating Wrike & Salesforce... WITHOUT DEVELOPERS

## Setup Steps

1. **Create template in Wrike**
2. Create Custom Workflow in Wrike
3. Create custom object in SFDC
4. Configure Azuqua; when SFDC object is created → Trigger template creation in Wrike



Experience Template

1.0 - Creative Brief
2.0 - Copy
3.0 - Design
4.0 - Approvals

# Integrating Wrike & Salesforce... WITHOUT DEVELOPERS

## Setup Steps

1. Create template in Wrike
2. **Create Custom Workflow in Wrike**
3. Create custom object in SFDC
4. Configure Azuqua; when SFDC object is created → Trigger template creation in Wrike

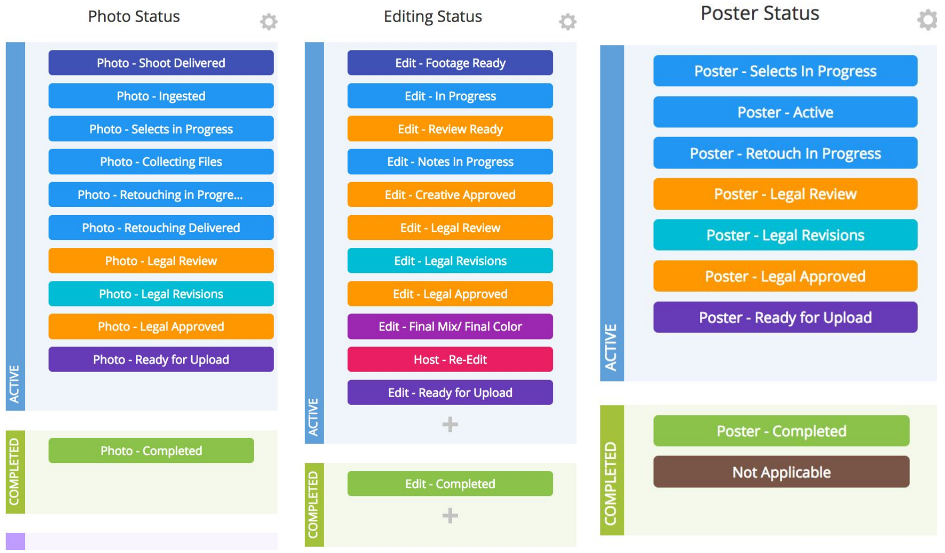


Photo Status

ACTIVE

- Photo - Shoot Delivered
- Photo - Ingested
- Photo - Selects in Progress
- Photo - Collecting Files
- Photo - Retouching in Progre...
- Photo - Retouching Delivered
- Photo - Legal Review
- Photo - Legal Revisions
- Photo - Legal Approved
- Photo - Ready for Upload

COMPLETED

- Photo - Completed

Editing Status

ACTIVE

- Edit - Footage Ready
- Edit - In Progress
- Edit - Review Ready
- Edit - Notes In Progress
- Edit - Creative Approved
- Edit - Legal Review
- Edit - Legal Revisions
- Edit - Legal Approved
- Edit - Final Mix/ Final Color
- Host - Re-Edit
- Edit - Ready for Upload

COMPLETED

- Edit - Completed

Poster Status

ACTIVE

- Poster - Selects In Progress
- Poster - Active
- Poster - Retouch In Progress
- Poster - Legal Review
- Poster - Legal Revisions
- Poster - Legal Approved
- Poster - Ready for Upload

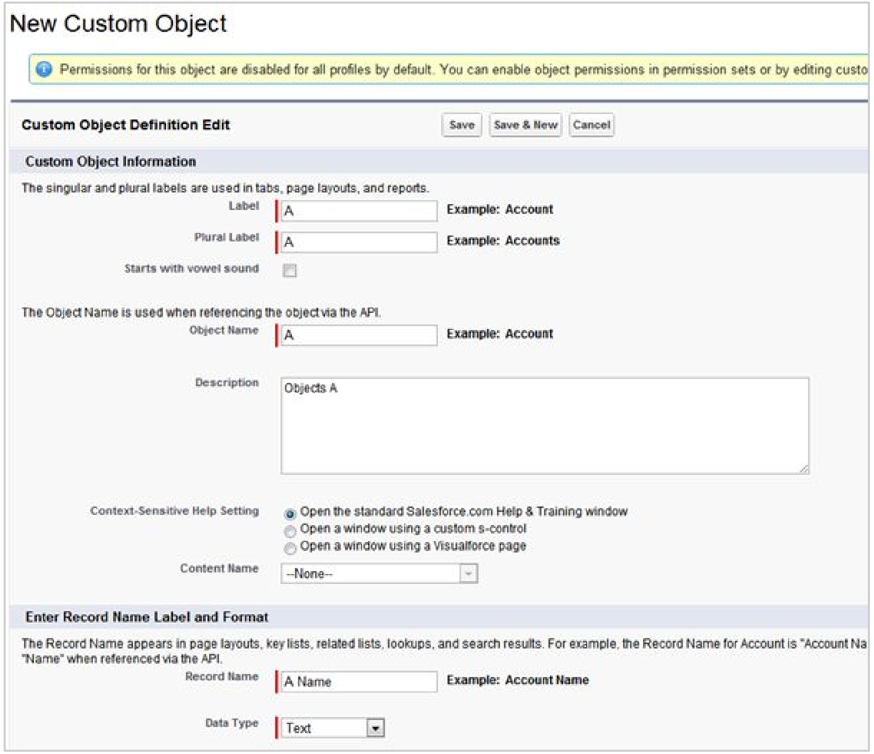
COMPLETED

- Poster - Completed
- Not Applicable

# Integrating Wrike & Salesforce… WITHOUT DEVELOPERS

## Setup Steps

1. Create template in Wrike
2. Create Custom Workflow in Wrike
3. **Create custom object in SFDC**
4. Configure Azuqua; when SFDC object is created → Trigger template creation in Wrike



New Custom Object

Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custo

**Custom Object Definition Edit**

**Custom Object Information**

The singular and plural labels are used in tabs, page layouts, and reports.

| | | |
|---|---|---|
| Label | A | Example: Account |
| Plural Label | A | Example: Accounts |
| Starts with vowel sound | ☐ | |

The Object Name is used when referencing the object via the API.

| | | |
|---|---|---|
| Object Name | A | Example: Account |
| Description | Objects A | |
| Context-Sensitive Help Setting | [✓ Open the standard Salesforce.com Help & Training window] Open a window using a custom s-control Open a window using a Visualforce page | |
| Content Name | --None-- | |

**Enter Record Name Label and Format**

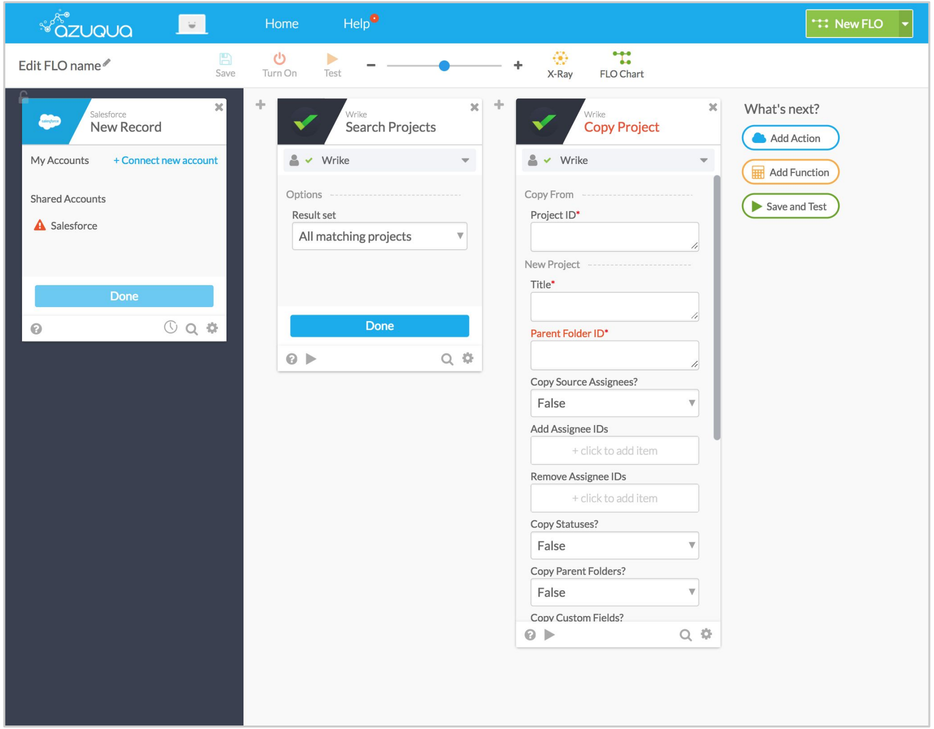
The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Na "Name" when referenced via the API.

| | | |
|---|---|---|
| Record Name | A Name | Example: Account Name |
| Data Type | Text | |

# Integrating Wrike & Salesforce… WITHOUT DEVELOPERS

## Setup Steps

1. Create template in Wrike
2. Create Custom Workflow in Wrike
3. Create custom object in SFDC
4. **Configure Azuqua; when SFDC object is created → Trigger template creation in Wrike**



## Third-party Middleware Services

- zapier azuqua workato

- **Pros:** ease & simplicity of use, support services, built-in hosting of the integration

- **Cons:** monthly subscription fees, lack of total control, API functionality is limited by what is supported by said middleware service

## Two Paths to APIs: Middleware Services vs. Custom Built

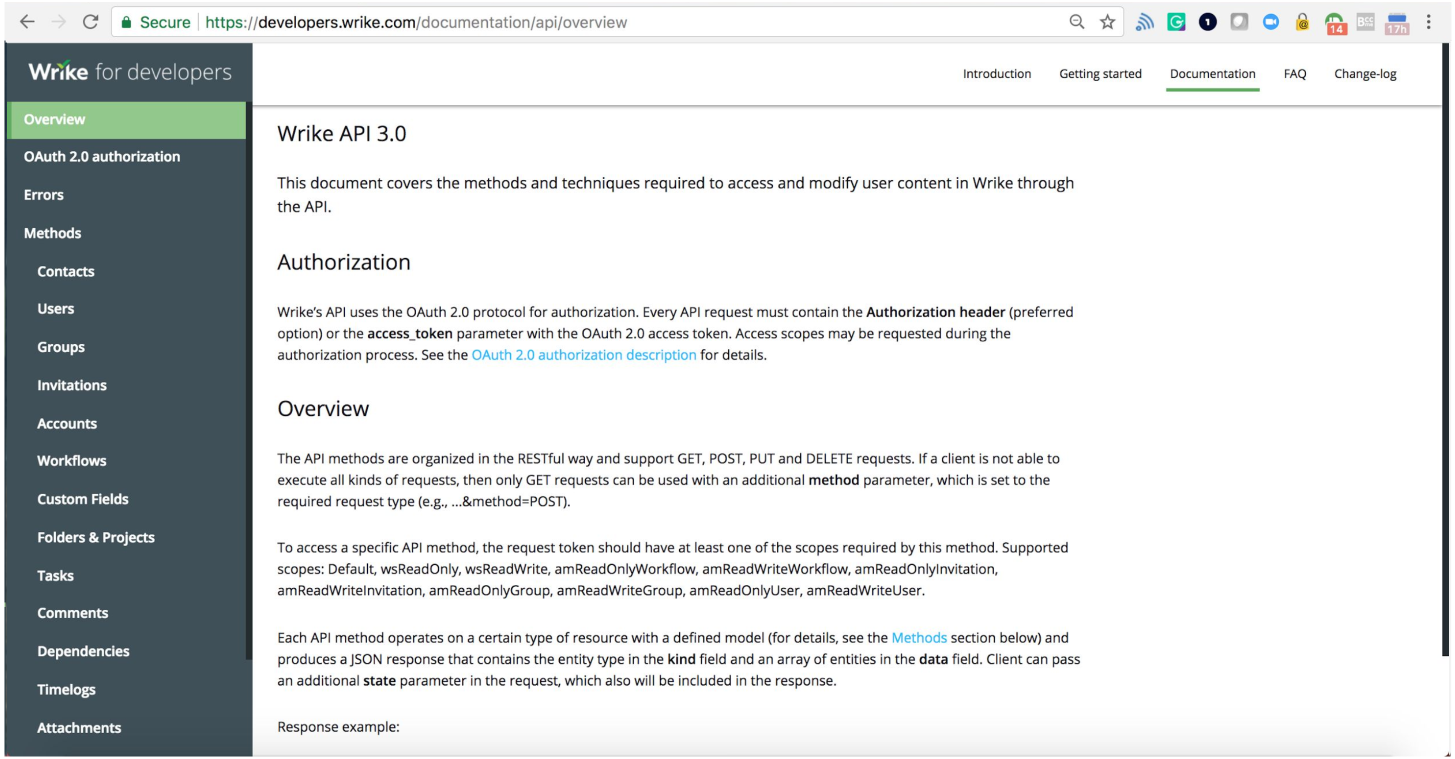
Do you have development resources?

- Unfortunately no…
  - No worries—Third-party middleware services can take care of you!

zapier azuqua workato

- **Yes, definitely!**
  - **Awesome! You can get your developers started here:**
    - **developers.wrike.com**

# Wrike's API: developers.wrike.com/documentation



## Wrike API 3.0

This document covers the methods and techniques required to access and modify user content in Wrike through the API.

## Authorization

Wrike's API uses the OAuth 2.0 protocol for authorization. Every API request must contain the **Authorization header** (preferred option) or the **access_token** parameter with the OAuth 2.0 access token. Access scopes may be requested during the authorization process. See the OAuth 2.0 authorization description for details.

## Overview

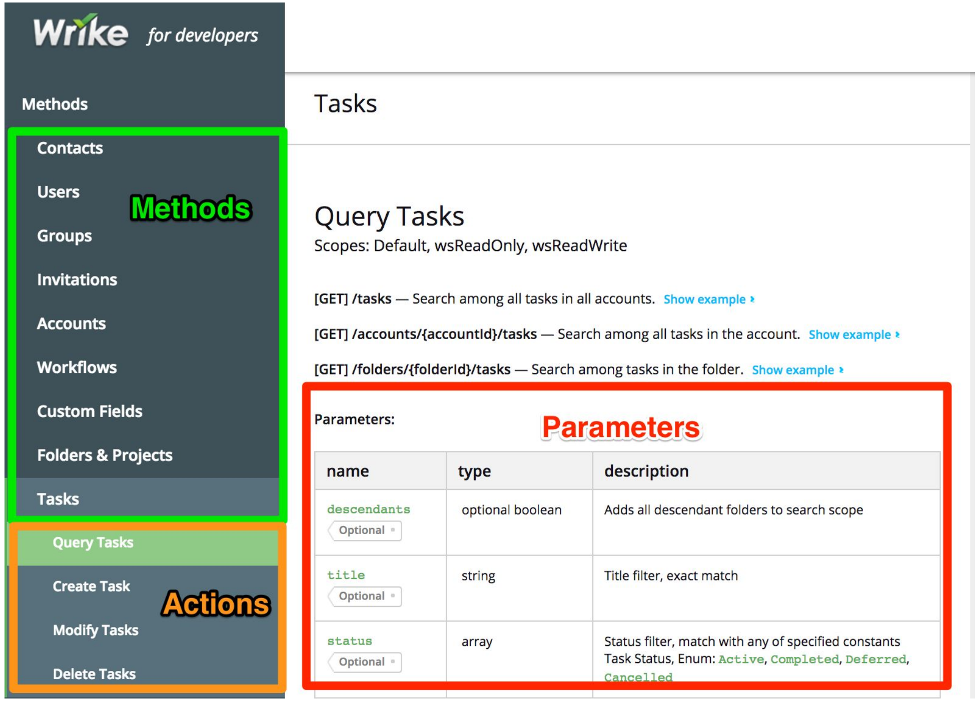
The API methods are organized in the RESTful way and support GET, POST, PUT and DELETE requests. If a client is not able to execute all kinds of requests, then only GET requests can be used with an additional **method** parameter, which is set to the required request type (e.g., ...&method=POST).

To access a specific API method, the request token should have at least one of the scopes required by this method. Supported scopes: Default, wsReadOnly, wsReadWrite, amReadOnlyWorkflow, amReadWriteWorkflow, amReadOnlyInvitation, amReadWriteInvitation, amReadOnlyGroup, amReadWriteGroup, amReadOnlyUser, amReadWriteUser.

Each API method operates on a certain type of resource with a defined model (for details, see the Methods section below) and produces a JSON response that contains the entity type in the **kind** field and an array of entities in the **data** field. Client can pass an additional **state** parameter in the request, which also will be included in the response.

Response example:

# Wrike API: Documentation



Tasks

Query Tasks

Scopes: Default, wsReadOnly, wsReadWrite

[GET] /tasks — Search among all tasks in all accounts. Show example ›

[GET] /accounts/{accountId}/tasks — Search among all tasks in the account. Show example ›

[GET] /folders/{folderId}/tasks — Search among tasks in the folder. Show example ›

Parameters:

| name | type | description |
|---|---|---|
| `descendants` Optional | optional boolean | Adds all descendant folders to search scope |
| `title` Optional | string | Title filter, exact match |
| `status` Optional | array | Status filter, match with any of specified constants Task Status, Enum: `Active`, `Completed`, `Deferred`, `Cancelled` |

| **Action** |
|---|
| [POST] - Create<br>[GET] - Read<br>[PUT] - Update<br>[DELETE] - Delete |
| **Object (Methods)** |
| -Wrike example-<br>/task/<br>/folder/ |
| **Parameters** |
| -Wrike example-<br>{date}<br>{taskID}<br>{taskStatus} |

# Large Radio Advertiser's External Spot Approval System

**Large Radio Advertiser** created a custom client-facing portal powered by the Wrike API to expose review-ready audio clips and receive approval and feedback by non-Wrike users

**Scenario:**

- A radio 'spot' is sold to a customer, each one must be individually produced, reviewed, approved, & aired by local radio stations

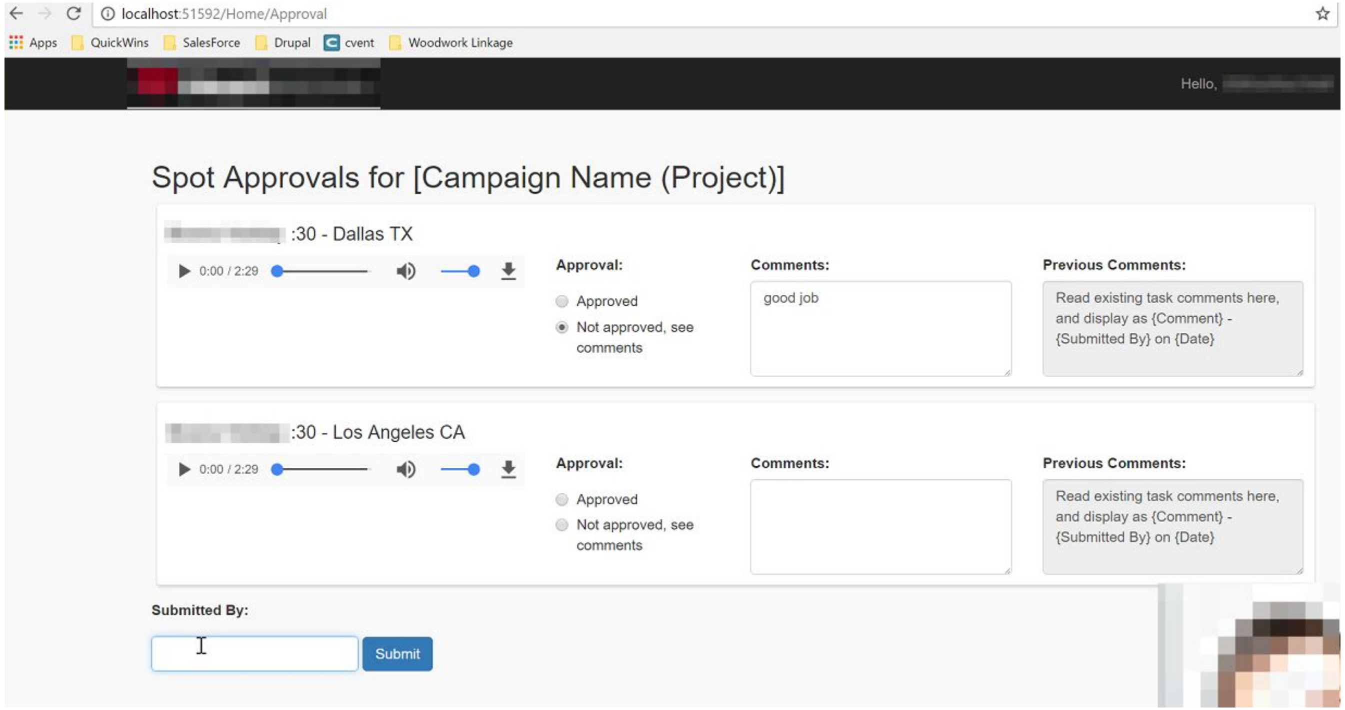
**Pain:**

- Hundreds (sometimes thousands) of emails back and forth
- Confusing attachments, no versioning, missed air-dates

**Solution:**

- Wrike to track responsibilities internally
- Wrike-powered portal to enable reviews **without** email

# Spot Approval Portal: What a Customer Sees



localhost:51592/Home/Approval

Apps | QuickWins | SalesForce | Drupal | cvent | Woodwork Linkage

Hello,

Spot Approvals for [Campaign Name (Project)]

:30 - Dallas TX

0:00 / 2:29

**Approval:**

- Approved
- [✓ Not approved, see comments]

**Comments:** good job

**Previous Comments:** Read existing task comments here, and display as {Comment} - {Submitted By} on {Date}

:30 - Los Angeles CA

0:00 / 2:29

**Approval:**

- Approved
- Not approved, see comments

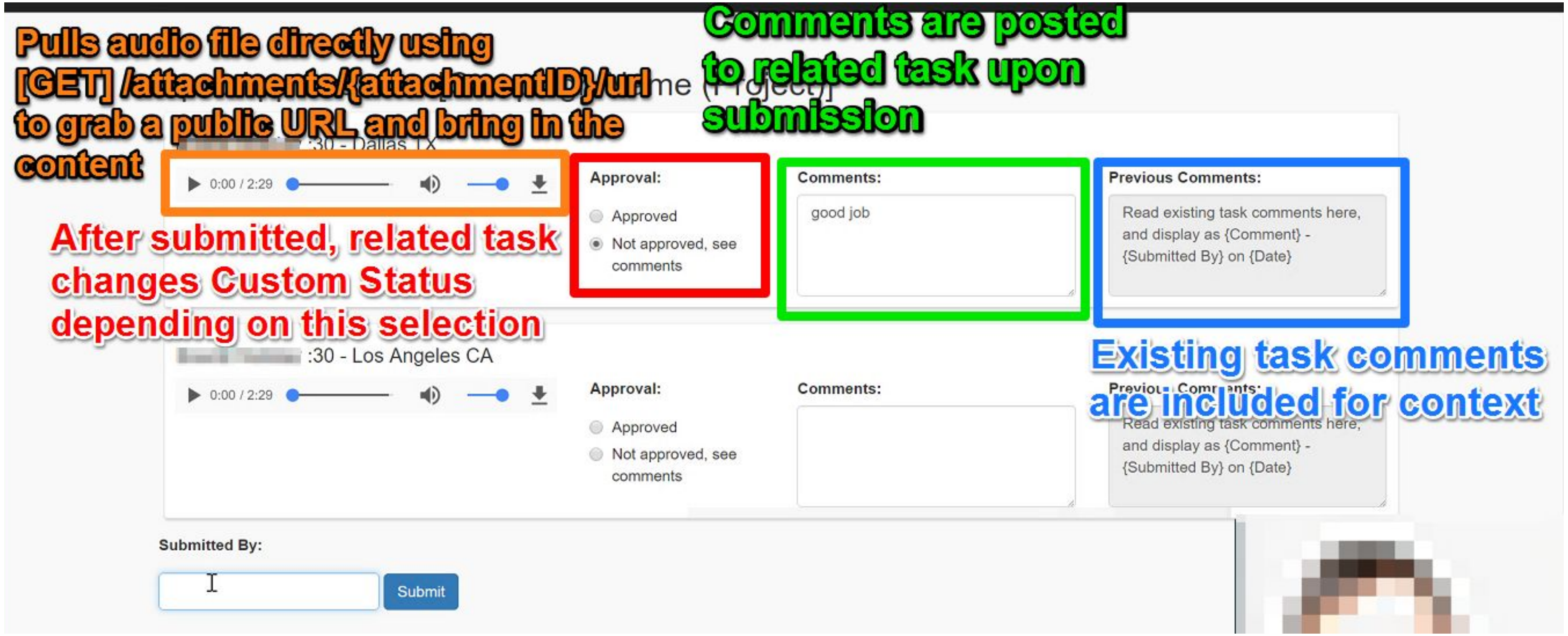
**Comments:**

**Previous Comments:** Read existing task comments here, and display as {Comment} - {Submitted By} on {Date}

**Submitted By:**

Submit

## What Powers that Portal?



Pulls audio file directly using [GET] /attachments/{attachmentID}/url to grab a public URL and bring in the content

Comments are posted to related task upon submission

After submitted, related task changes Custom Status depending on this selection

Existing task comments are included for context

[redacted] :30 - Dallas TX

0:00 / 2:29

Approval:

( ) Approved
(● Not approved, see comments)

Comments:

good job

Previous Comments:

Read existing task comments here, and display as {Comment} - {Submitted By} on {Date}

[redacted] :30 - Los Angeles CA

0:00 / 2:29

Approval:

( ) Approved
( ) Not approved, see comments

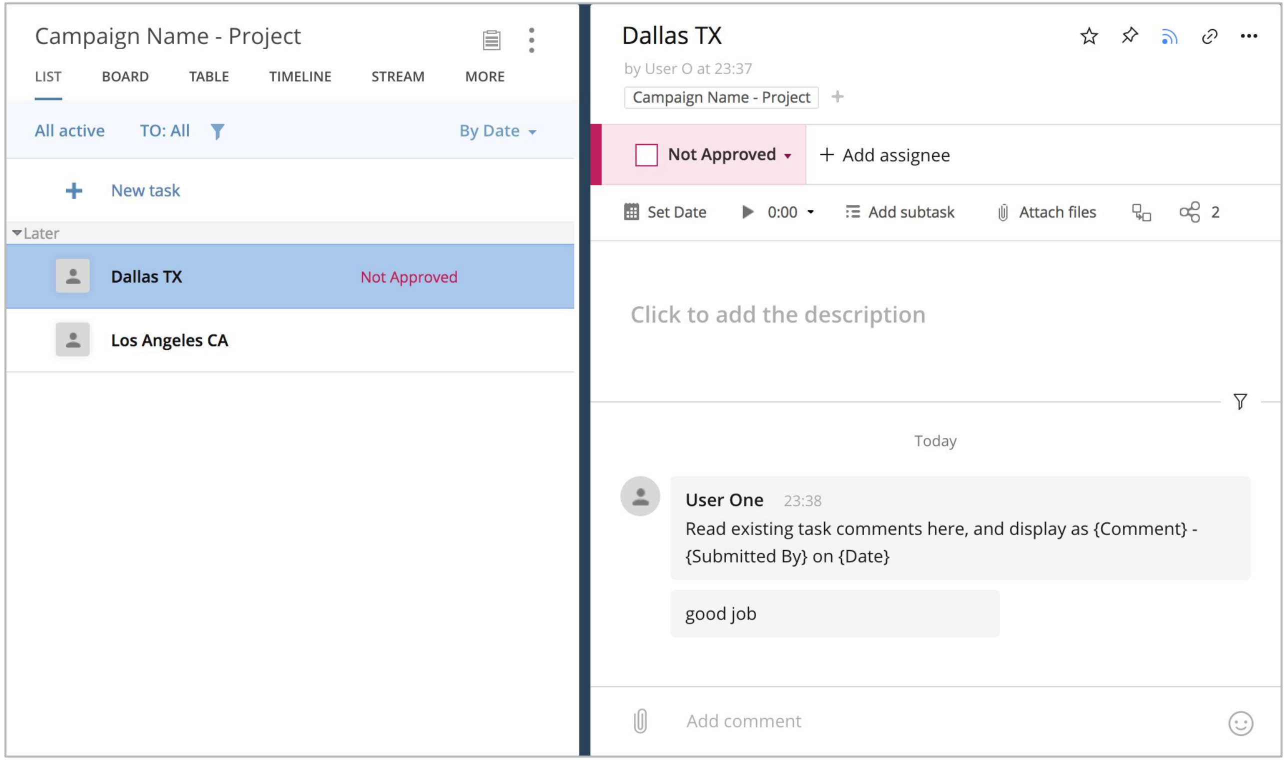
Comments:

Previous Comments:

Read existing task comments here, and display as {Comment} - {Submitted By} on {Date}

Submitted By:

# Spot Approvals: What it looks like inside of Wrike



User One 23:38

Read existing task comments here, and display as {Comment} - {Submitted By} on {Date}

good job

## How are you feeling?

## Custom Development: Building a REST API Integration

- **Pros:** total control over the development process, can leverage 100% of API power & functionality

- **Cons:** higher resource needs, time-intensive, ongoing maintenance costs

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# Questions & Answers