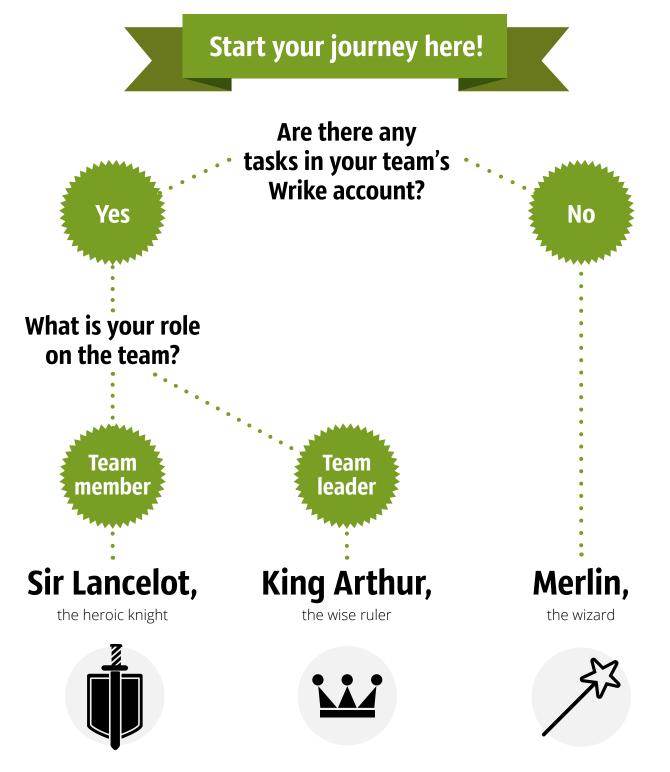


Chasing the productivity mystery: Checklist for newcomers

Project management software that makes your life easier



Go through <u>your checklist</u> and learn how to manage your tasks and get a clear overview of your responsibilities! Go through <u>your checklist</u> and learn how to keep your projects under control with the help of Gantt charts, workload and other features! Go through <u>your checklist</u> and learn how to organize your work in Wrike and share it with others!

Sir Lancelot, the heroic knight

Conquer your own heights

Thinking about climbing the Everest or trying your fortune in Las Vegas? Right in the parent folder create a folder called "My epic quest" – That will be a private place for all your ambitious plans, bold ideas and secret strategies.

If you don't see any projects or tasks in your workspace, think twice – maybe your destiny is to be a magician and create all the missing items? Then go to the checklist "Merlin, the Wizard," and it'll show you how to organize your task in Wrike and share it with others.

Time for your first quest

In the parent folder create a task called "Let's Wrike It." Add a task description "My first task," assign it to yourself, set a high importance and then ... mark it complete! The first victory is yours! Good enough to reward yourself with a big cup of coffee!

Explore surroundings

Look through the folders to catch the logic behind their titles. Remember that you see only folders that are shared with you. Your private folder (which you created during the step 1) is visible to you only.

Hesitating? Ask your fellow knights!

<u>Find tasks assigned to you</u>. Got a question? Ask right there in the tasks. If you can't find any of your tasks, <u>cry for help in the Activity Stream</u>, and your teammates will eagerly give you a hand. Start with @ followed by your knight's name – so it's clear whom you're addressing.

Test your skills in real life

Do you need some help with one of your new work duties? In one of the folders that are shared with you, create a task and assign it to one of your teammates. Set the start date (today) and the due date (tomorrow). There can't be too much practice – so continue creating new tasks and assign them to yourself to reflect your main responsibilities.

Stay in the center of events

Knowledge is power, so don't miss any of the recent updates! Visit the <u>Activity Stream</u> – it'll show you the latest task updates and messages from other team knights. And if there are too many updates to handle, simply <u>filter them to your needs</u>.

Keep your best weapon at hand

Some folders or tasks require more attention than others. Create a special folder called "<u>Favorite</u>" (or "My top tasks") and use it as a <u>tag</u> for these items.



Take a look at the Dashboard

Your <u>dashboard</u> shows all of the most important info. <u>Arrange widgets</u> so that your dashboard shows the most important task list. Switch to your dashboard once in a while to mark tasks complete and check your priorities. All knights know that it's better to keep your weapons neatly organized, well, you know, just in case.

Can't find this feature? It's available on the free premium trial. Ask your administrator to <u>upgrade</u>.

King Arthur, the wise ruler

Explore your possessions

Look attentively through your <u>folder tree</u> and tasks and check <u>sharing options</u>. This way, you'll make sure that your work is properly organized and <u>shared with all the appropriate teammates</u>. As you are the king of this workspace, use your power and add any missing <u>folders</u> or <u>tasks</u>.

If you don't see any projects or tasks in your workspace, think twice – maybe your destiny is to be a magician and create all the missing items? Then go to the checklist "Merlin, the Wizard", and it'll show you how to organize your task in Wrike and share it with others.



Making a long story short

Need to focus on a specific group of tasks (e.g., tasks due next week)? Apply any of the <u>advanced</u> <u>filters</u>. Practice makes perfect, so filter out tasks that are overdue, drag the most important task to the top of the list and <u>send a status request</u> to each of them.

When tired means unproductive

Your knights can't slay all the dragons in one day! Make sure they don't become victims of multitasking and work overload. Take a look at the <u>Workload view</u> to ensure that none of your team members are overloaded with tasks.

Can't find this feature? It's available on the free premium trial. Ask your administrator to <u>upgrade</u>.

Stay at the forefront of events

All the news and updates can be found in the real-time <u>Activity Stream</u>. Take a look at it once a day, so you'll always be able to keep up with the work progress. Pay special attention to the <u>available</u> <u>filters</u>, so you can easily maneuver in the avalanche of news.

Get an overview of your battle plans

There is no need to climb a hill to get a bird's eye view of your work. Just switch to the <u>timeline</u>, and you'll see all your projects neatly visualized there. Your sharp eye caught a possible conflict? <u>Adjust schedules</u> with a quick drag and drop. Does your timeline seem empty? Check how the <u>tasks are</u>

scheduled. Keep in mind that <u>backlogged tasks</u> are invisible on your timeline.

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Keep your widgets organized

Need to track a certain slice of tasks (say, all tasks due in the next two weeks)? Just <u>add a custom</u> <u>widget</u> to your dashboard, so you always have this data at your fingertips.

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Keep your secrets safe

Create a folder called "Top secret: Burn after reading" right in the parent folder – It will be your private data not shared with anyone. It's the best place to keep your secret plans for conquering the world or organizing a pajama party next Sunday.

One more productivity hack

Create a special folder called "<u>Favorite</u>" (or "Strategic priorities" or "Super-mega-important stuff") and <u>use it as a tag</u> for all your important projects and tasks.

Merlin, the wizard

Let the magic begin

<u>Create a folder</u> called "The secret magic lab" – That is where all your projects and strategy will be stored. If "The secret magic lab" doesn't appeal to you, rename it to "My greatest project ever." Remember that your diverse magic skills include, among other things, the power to rename projects and tasks and create as many folders as you wish, so keep practicing. Remember, you can use some of them as tags for your tasks.

Structure your magic work

<u>Create subfolders</u> "Magic supplies for king Arthur" and "Secret spells" These will be the two main areas to focus your time and efforts on. If you need some more subfolders or sub-subfolders to further organize your magic tasks, just go ahead!

Plan carefully

<u>Create tasks</u> in "Magic supplies for the army" and <u>schedule them</u> (remember, these are just suggested names, you can choose any!):

"Estimate the potential demand" – 1 day "Mass production" – 2 days "Develop the list of potions" – 1 day "Deliver potions to the knights" – 1 day

Don't be afraid to experiment: Add task descriptions, set importance, and attach files so you'll become a "task master."

Take care of your best ideas

In the folder "Secret spells," create the following tasks (feel free to copy-paste or rename): "Superproductivity potion", "Seamless collaboration potion", "Potion for effortless project success". Remove the start and due dates in these tasks so they'll be magically turned into <u>backlogged</u> <u>tasks</u>. Keep in mind that it's a great way to store all your ideas and "someday/maybe" tasks without strict deadlines.

Keep your pearls at the top

To see all your tasks and ideas, choose your main folder "The secret magic lab" and click on the "Show descendants" button. Drag-and-drop the most important items to the top of the list, so you and your knights can focus on the most important things.

Get a bird's-eye view of your plans

Switch to the <u>timeline view</u> and turn "Deliver all potions" into a <u>milestone</u>. Otherwise, knights will have to start their battle without extra magical defense. Right on the timeline, <u>drag and drop</u> <u>tasks</u> to reschedule them a week ahead. Then create dependencies between tasks "Start mass production" and "Deliver potions to knights." When it's done, move the entire task chain 2 weeks earlier. Great, you've mastered the timeline!

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] That's a perfect plan!

Does it seem too challenging to handle all those tasks alone? <u>Invite your teammates</u> to Wrike and <u>share the folder</u> "Magic supplies for the army" with them. Important! Keep your "secret spells" folder private, so your secret knowledge is well-preserved.

If there is no user management tab in your profile, ask your admin to grant you administrative rights.

Time to delegate your work.

<u>Assign the tasks</u> to your "fellow magicians" according to their skills and preferences. Don't forget to leave some tasks for yourself. Are all your teammates equally busy with the quests? Glance at the <u>workload view</u> to check it.

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Time to celebrate your victory with a fantastic reward!



Get Wrike mobile apps for iPhone and Android for free