Advanced Best Practices

If you're reading this guide – Congratulations! You've moved on to become an advanced Wriker! Use this guide to learn more about our advanced features and some common uses. Now go out-collaborate, you Productivity Ninja!

Quickly Navigate to:

Requests

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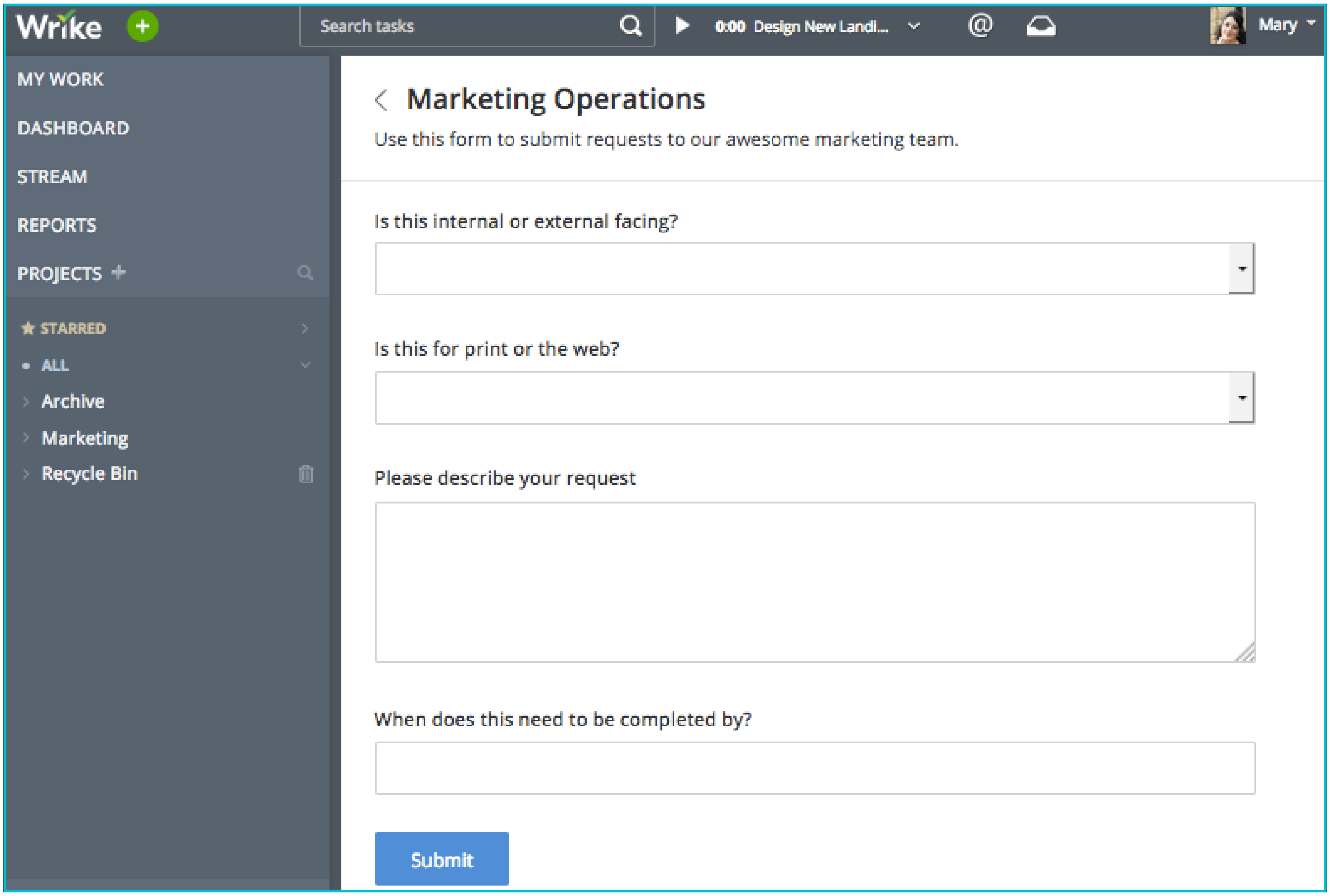
Requests

At a glance:
This feature allows you to have a standard procedure for gathering incoming work. These request forms can be used to simplify your intake process and add structure. You have the ability to customize a variety of question types to gather all information required to initiate work.

Learn more!
- ✓ [Requests Overview]
- ✓ [How Wrike uses Wrike Requests to Deliver Content]



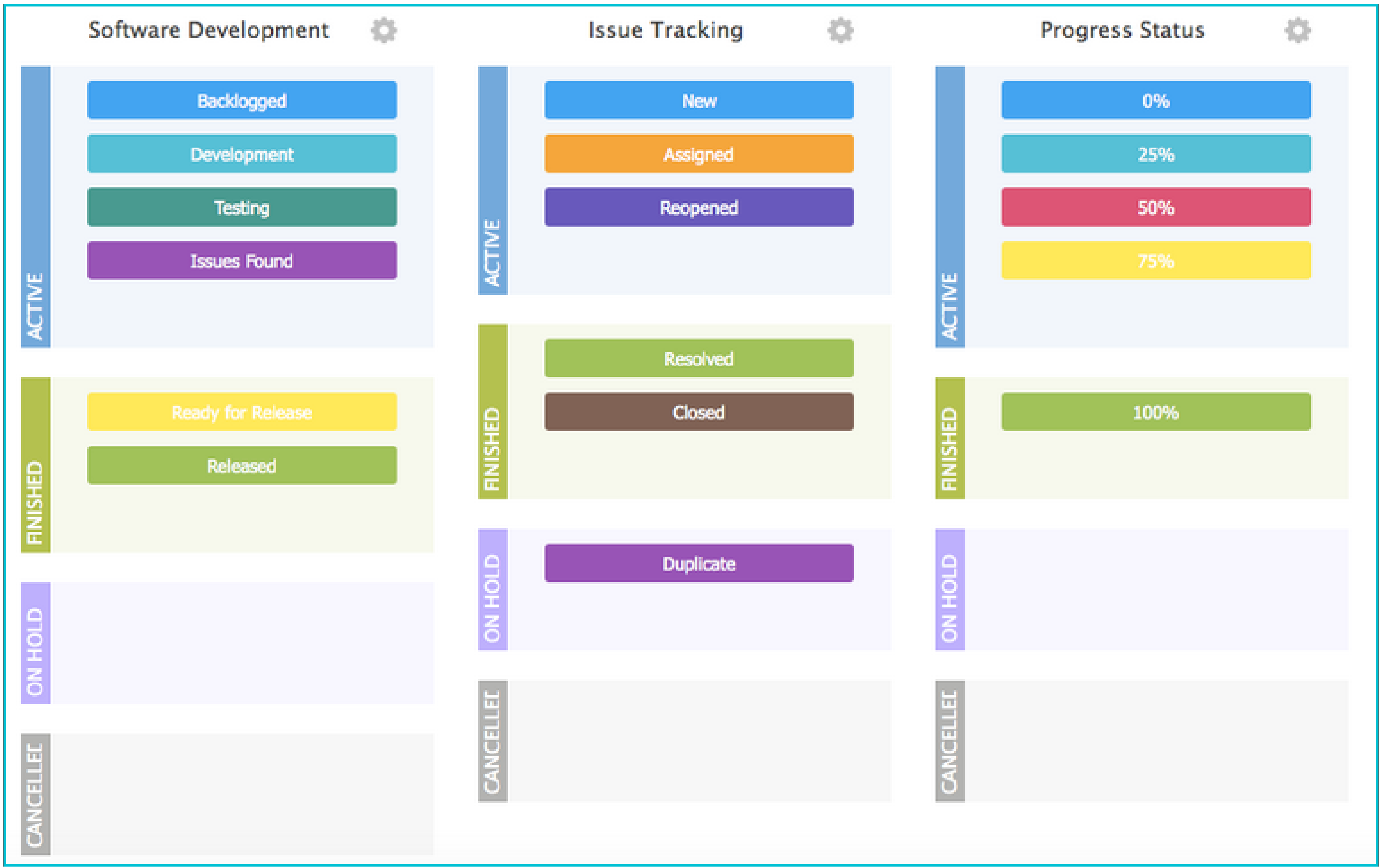
Deeper Dive:
Technically speaking, the request form is giving structure to a task, which is the end result of the form. The information provided on your request form populates in the title, date and description of a task. You are then able to pick a designated assignee and destination folder/project for these tasks.

Common uses:
Marketing collateral, purchasing, small scale help desk, internal requests.

Custom Workflows

At a glance:
Custom workflows allow you to give more visibility to each task; different work has a different lifecycle. By setting up a custom workflow you can represent all the stages your work goes through.

Learn more!
- ✓ [Custom Workflows - Overview]
- ✓ [How to Create a Kanban Board in Wrike]



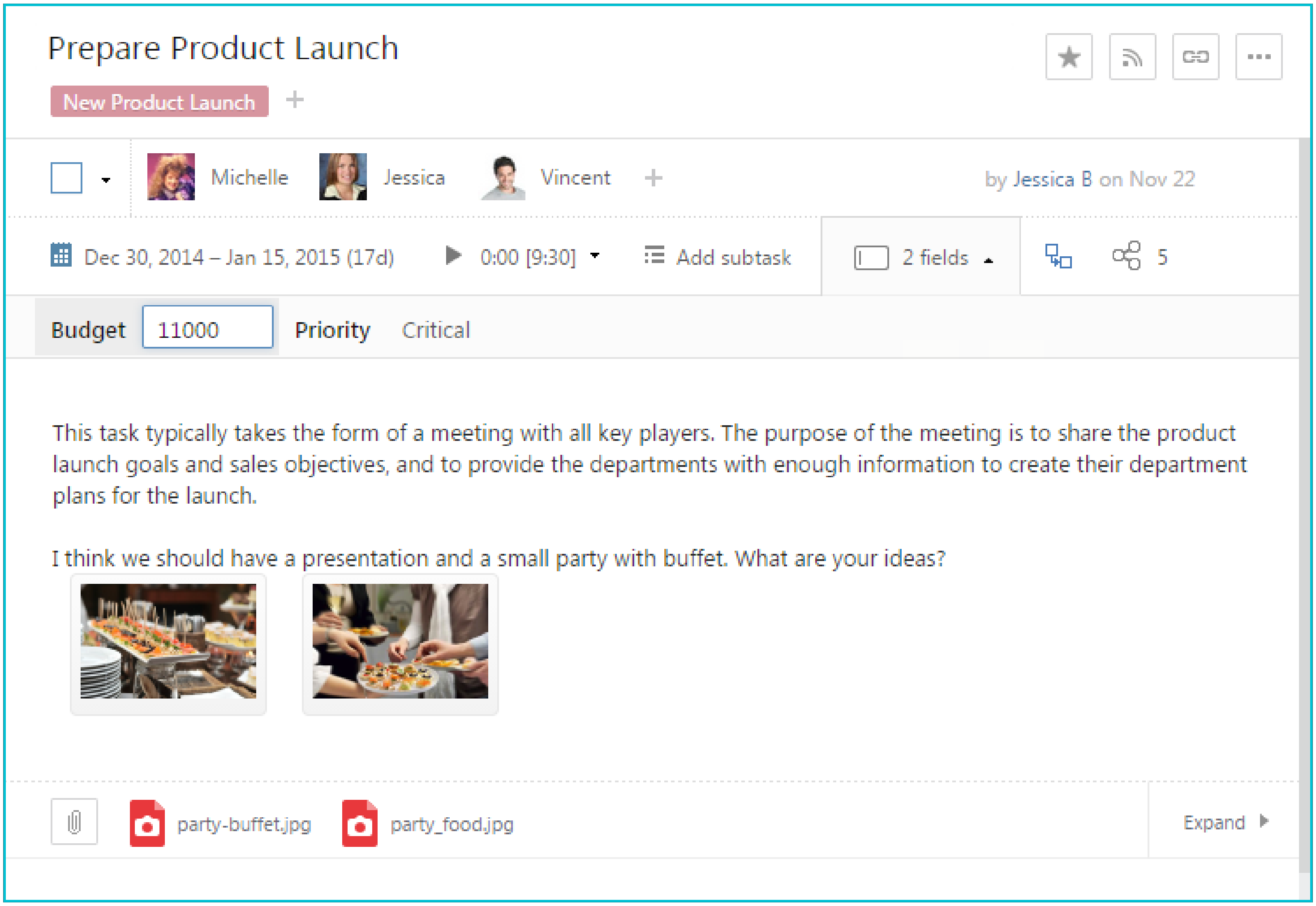
Deeper Dive:
These are set up FOLDER BY FOLDER to allow you to structure different workflows for all the work in Wrike. When you set up a workflow for a specific folder all tasks created in that folder will take on that workflow. Each status you set up should have a clear definition to keep you and your team on the same page. Additionally, you can use these statuses in a Kanban workflow to further simplify your work in a dashboard or set up a report to sort your tasks by these new custom statuses.

Common uses:
Often times people use custom workflows to represent their process, client communication, holds in their work, and other various phases and stages.

Custom Fields

At a glance:
Wrike gives you the ability to add custom field types to track unique data points. These can be used to filter, report, and differentiate your tasks.

Learn more!
- ✓ [Custom Fields - Overview]
- ✓ [Use Custom Fields to Create Custom Weekly Reports]



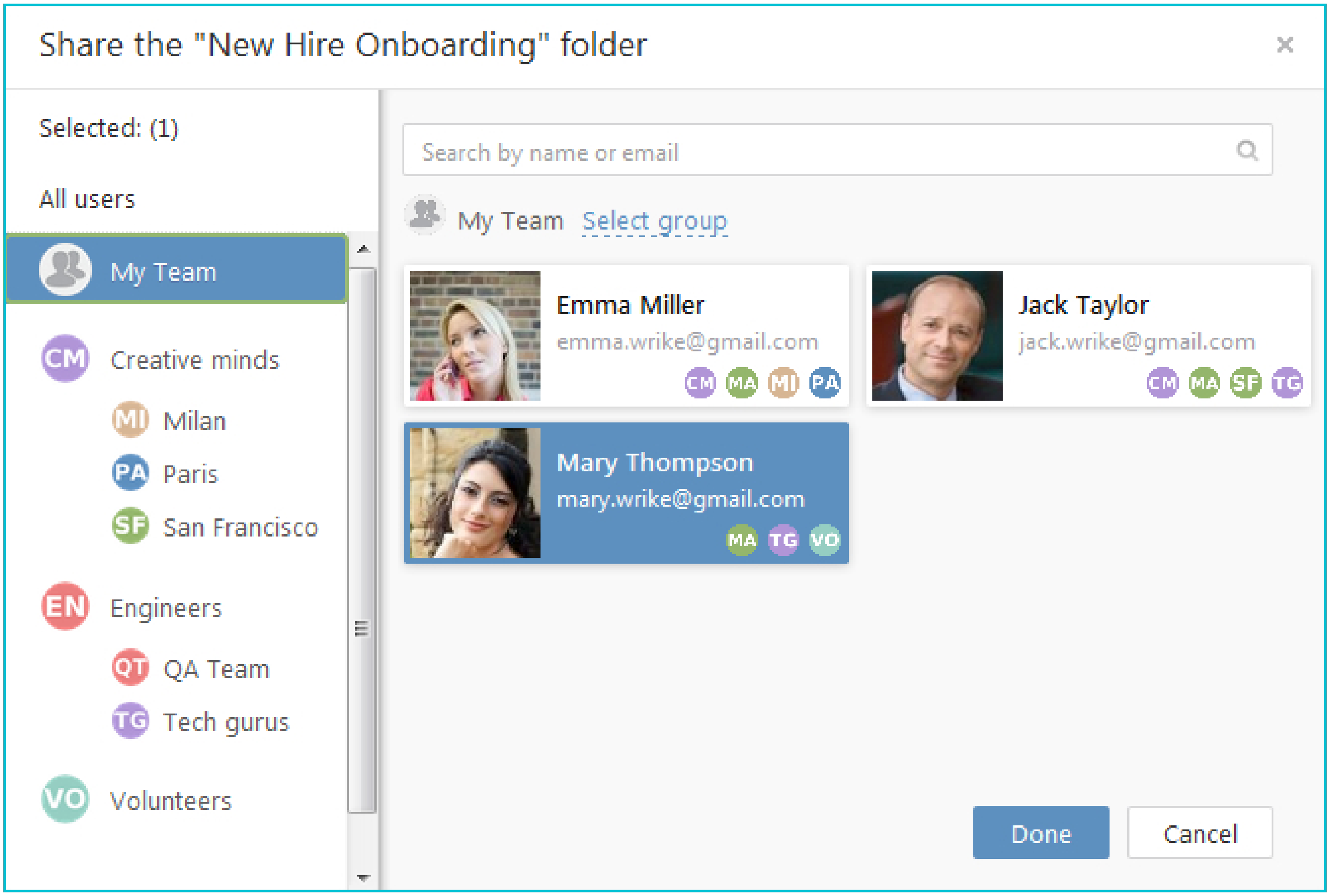
Deeper Dive:
Custom fields are also set up folder by folder. You can set custom fields for all entities (folders, projects, tasks and subtasks), just folders and projects, or at the project level only. They also provide the flexibility to choose the visibility level to keep sensitive data confidential. Custom fields are visible in the table view for easy data management and can also be used in Reports to create even more customized reports.

Common uses:
Some custom fields that are typically tracked are Budget vs Actual Spend, Product and/or Industry, Segment, Department and Priority Level.

Groups

At a glance:
Do you ever forget to mention someone on an email? Forget to share a file or spread sheet? Groups help to make sure you never leave someone out. By setting up groups you can bring your team's attention to a certain task, folder or project. Additionally, you can selectively share relevant information with proper teams and users.

Learn more!
- ✓ [User Groups - Overview]
- ✓ [Coordinate Multiple Teams Efficiently with User Groups]
- ✓ [Shared Permissions using User Groups]



Deeper Dive:
As you add users to each user group, they will automatically be included in any folders, projects and communication associated with that user group. Make sure to take advantage of the ability to @mention user groups for FYIs, visibility, and shared resources.

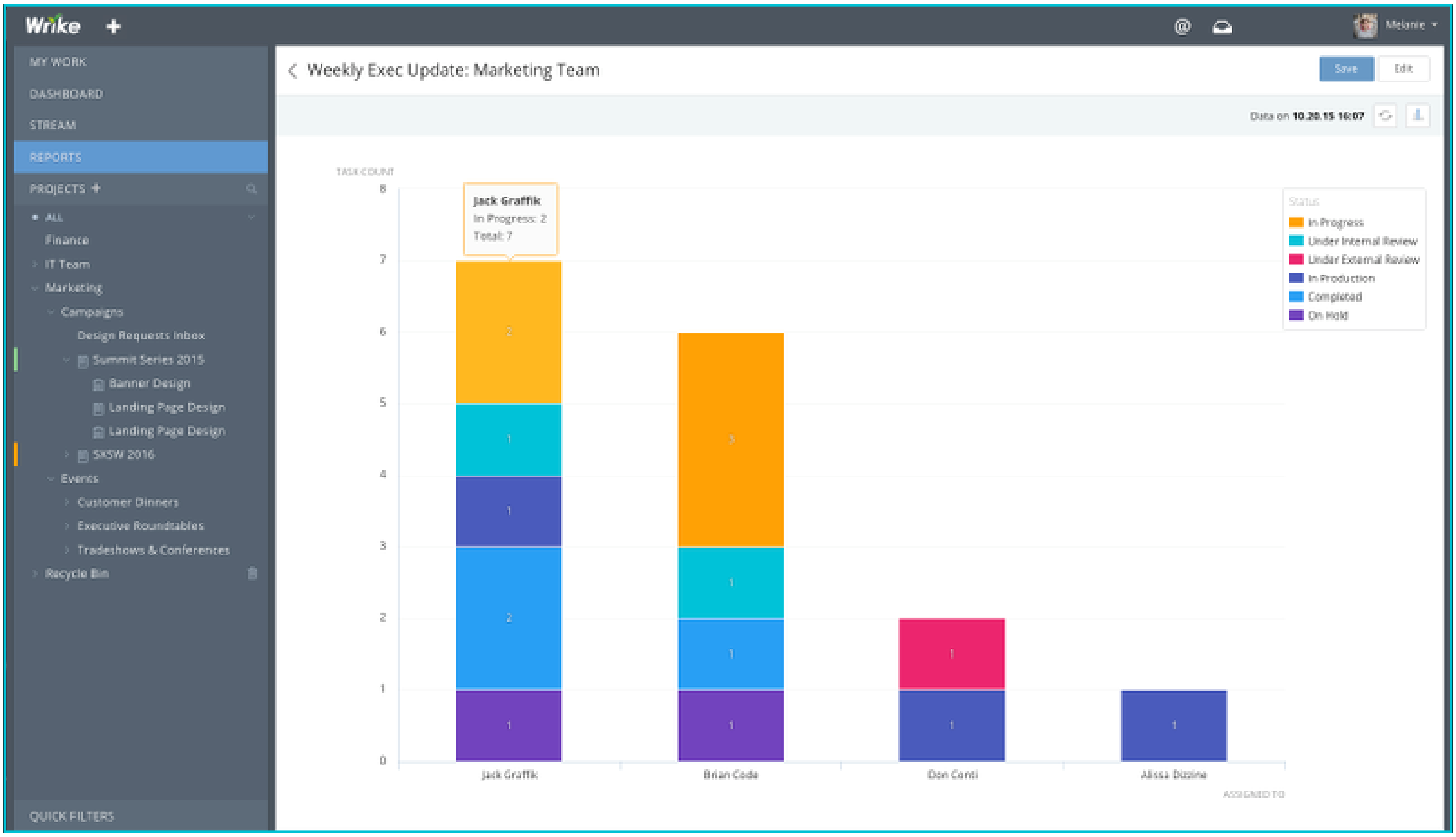
Common uses:
Segmenting Wrike users into their respective teams and departments using user groups allows work to seamlessly translate into the workspace.

Reports

At a glance:
Folks spend hours gathering information for status updates while managers still struggle to get the big picture view of where all work stands, what is going well and what is at risk. Reports provide an easy-to-use reporting engine that gives you the ability to customize tables and charts to get to the insights you need. Reports simplify the ability to instantly gather accurate, up-to-the-minute project status information and then share that information with the folks who need to take action.

Learn more!

- ✓ [Reports - Overview]
- ✓ [Accurate Real Time Insights with One Click]
- ✓ [Report Snapshots]



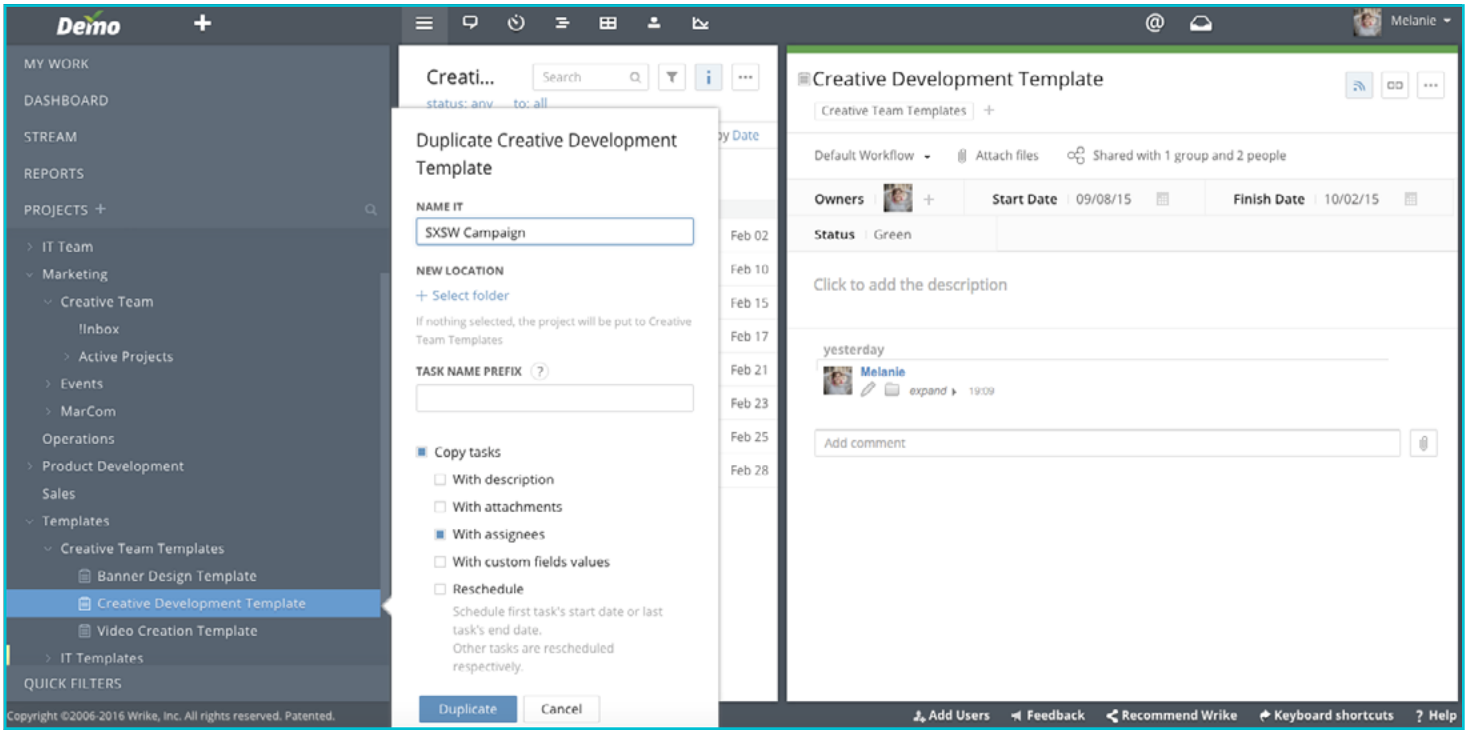
Deeper Dive:
Reports allow you to report on the project level or task level. Project based reports give an overview of the project owner, start and end date, status, and all custom fields related to your projects. Task based reports allow you to select the source folder and/or project and then report on different metrics and data points. You can filter your tasks to drill down on relevant information by using statuses, custom fields, assignees, etc. to sort your tasks. Using the gear icon in the top left-hand corner, you can pick and choose which data you wish to present on each individual report. Be sure to check out graphical reports to give visual representation to your work!

Common uses:
You can easily report on all the workflows, custom fields and projects you have created in Wrike to give greater insight to your progress, efficiency and performance indicators. Create reports to show Milestones, overdue tasks, tasks completed this week or tasks due this month. There are a variety of ways to see your work.

Project Templates

At a glance:
Project templates help simplify the process of starting a new project by taking repeatable processes and templating them. Use Wrike's duplication feature to turn any project into a Template.

Learn more!
- ✓ [Project Templates - Overview]
- ✓ [How to Automate Marketing Project Creation with Duplication]



Deeper Dive:
Start by creating a Templates folder where you can house all of your new project templates. You can either create a project from scratch in the Template folder, or right click on a project and duplicate it into the Templates folder. Any time a new project has to be initiated, users can navigate to the Template folder and duplicate and reschedule a new project into the associated folder and make any adjustments necessary. Be sure to change all of the tasks in your project template to a 'Deferred' status to prevent adding an extra project to your reports.

Common uses:
Create templates for small to mid-sized projects that are repeatable. The timeline and tasks do not have to be perfect – just close enough to help get a project started more efficiently.