

Wrike Basics

An Introduction to Wrike's Building Blocks

This document is intended to provide you and your team with basics on getting started with Wrike. It provides information on key concepts and navigating the Wrike Workspace.

INSIDER TIP: Create a FAQ Folder in Wrike for your team and include this document there as a Quick Reference Guide or print this out for users to keep.

Learn to Wrike QUICKLY!

[Attend a Wrike Webinar](#) and get your specific questions answered.

Check out the [Getting Started](#) page in the Help Center.

Test your knowledge! Check out the interactive individual training [here](#).

Set up Your Profile – Upload a profile picture. Click your profile image in the Workspace's top right-hand corner, then select "View profile". Add your profile picture.

Wrike Overview

Wrike helps you organize and track your work, collaborate with others, and report on what's been done.

What you see in Wrike depends on what's been shared with you. If your team is new to Wrike, your Workspace (what you see when you log in to Wrike) may be empty. If your team has already started using Wrike and has created (and shared) Tasks, Folders, and Projects with you, then you may see information in the Workspace from the start.

Workspace Layout

Navigation Panel

Inbox: Shows notifications right in the Workspace. If you are @mentioned or a task is assigned to you, the notifications appear here. You can archive notifications to come back to them later or mark them as read.

My Work: Your personal view. It primarily shows tasks assigned to you. Feel free to drag and drop tasks here without impacting due dates or any task details.

Dashboard: View filtered task lists and monitor the tasks which are most important to you. Learn more about individual and shared Dashboards and how to create custom widgets.

Stream: Live feed on all updates to work you're shared with in Wrike.

Reports: (Enterprise only) Generate real-time Reports on work.

Folders and Projects: Where all work lives. Select a Folder or Project from the left-hand Navigation panel to see all the tasks stored in that location.

Calendars: help you keep track of what needs to be worked on and when, stay in sync with your team, and visualize your project's schedule

Ways to View Information

Views in Wrike allow you to see information in the way that's most convenient for you. Select a Folder/Project and then use the views to see its tasks from different angles.

List: Resembles a to-do list. It's my favorite view for creating tasks quickly. You can view Tasks from a Folder and its Subfolders by clicking the menu button and selecting "Show Subfolders".

Board: shows a Folder or Project's tasks organised in columns by status.

Stream: Similar to the Stream in the left Navigation panel, but it focuses only on the chosen Folder (and Subfolders). This is the best view for keeping track of work being done in real time and for reviewing updates made that day.

Timelog: Shows you time logs entered on the tasks in the chosen Folder.

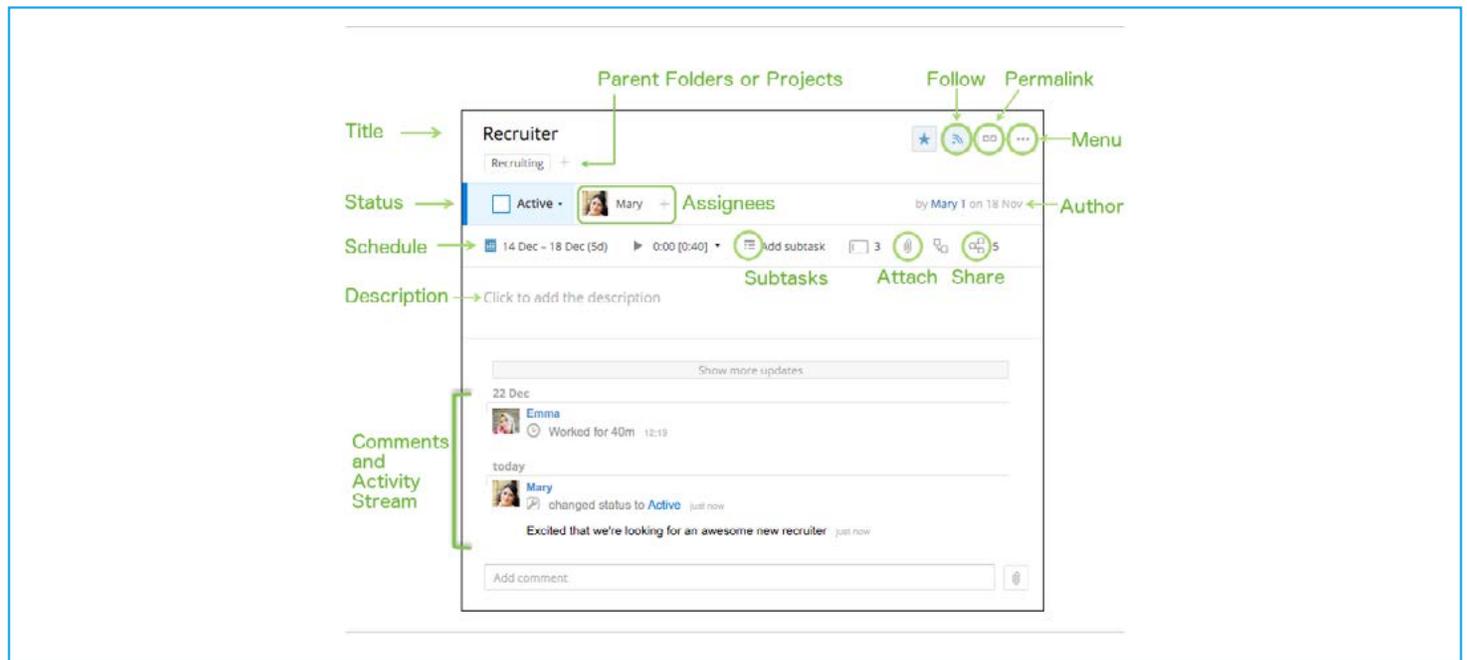
Gantt Chart**: This displays the flow of work, time duration, and task dependencies in your selected Folder. This is the ideal view for scheduling and planning tasks.

Table: Similar to a spreadsheet, this view allows you to see important information in a grid. You can edit what information you do/don't want to see. It's great for reporting and updates during status meetings.

Workload**: Focuses on assignment distribution. It shows the current workload and availability of all your team members. Unassigned tasks are visible at the bottom of the view to distribute to your team.

***By nature and purpose, when you look at these views tasks without an assigned due date are not visible.*

Task Basics



1. To create a [new Task](#) click **+ New Task**, type the name of the task, and hit Enter to save.
2. **Set Dates** for task completion.
3. Either create a task in the appropriate Folder or **Add the task to a Folder**.
4. Tasks can be in **multiple Folders** at the same time. Click the + under the task name, while a task is open. This allows you to add tasks to additional Folders.
5. [Subtasks](#) follow the same basics as tasks.
All activities related to the bigger project should be kept in one place to keep projects organized in a central location. Follow the same process for assigning, setting dates, etc.
6. Write a **Description**.
This is a good place to put details, ideas, and notes related to the task and what needs to be done. It's essential that the person assigned to the task understands what's expected. Text in the description field is automatically saved.
7. **Attach Files** to a task. This ensures all info associated with the task is centrally located and can be picked up at any time by others if needed. Have a new file version to attach? Right click on a file and select "Upload new version".
8. **Assign the task** to the correct person.
Tasks should only be assigned to one person unless there's a specific situation. This avoids confusion on who's in charge. If you want others to be in the loop, try @mentioning them in the comments. It's best to assign tasks as one of the last steps in creating the task. That way if you create 10 subtasks or make multiple changes while setting things up, assignees won't receive notifications for all 10 changes.
9. **Comments** (within a task)
If you **@mention** someone in the comments, they receive a notification on the top navigation bar of their page. You can @mention more than one person. Simply type @ and a list of names will pop-up to select from. (example - @Brittany Hallett)
@mentioning adds someone as a follower of the task.
You can also @mention User Groups to quickly share items with all of group's members instead of manually sharing items with each of them.
10. You must click Send or press Shift + Enter to post comments.
Learn more details about tasks [here](#).

Set up Your [Dashboard](#)

Right out of the box you have a Dashboard with your name. Click the gear symbol next to a Dashboard's name to choose what you want on your personal Dashboard. Some good basic choices: **Assigned to Me, To Do Today/This Week, Assigned by Me, My Overdue, My Backlog, and Activity Stream.**

[Search Function](#)

Use the search bar at the top of the Workspace to find a task either in the specific Folder you're in, or in the entire Workspace (of tasks shared with you). Can't find a Folder or Project? Click the search icon next to 'Projects' in the Navigation panel to quickly find a Folder or Project.

[Starring Folders and Tasks](#)

In Wrike you can highlight your favorite or most commonly worked in Folders/Projects and tasks to easily locate them later. When you hover over a Folder/Project in your left-hand Navigation panel, you'll see a star icon appear on the right. Click it and the Folder is added to the "Starred" section at the top of your Folder tree for easy access later.

To star a task, simply click the star icon on the upper right corner of the task detail panel. Starred tasks are available via the Inbox under the "Starred" tab.

[Email Notifications](#)

In Wrike you can edit what you are notified about and how often. This allows you to focus on the work that is the most important to you. To edit your email settings, click your name in the Workspace's upper right-hand corner. Select "View profile" and click the "Email addresses" tab.

[Sharing](#) = **Visibility**

You will only see the Folders/Projects that are shared with you and that you create. Talk to your team to make sure you have access to the correct Folders.

Folders/Projects (and content within them) that are not shared with anyone will only be accessible by you alone.