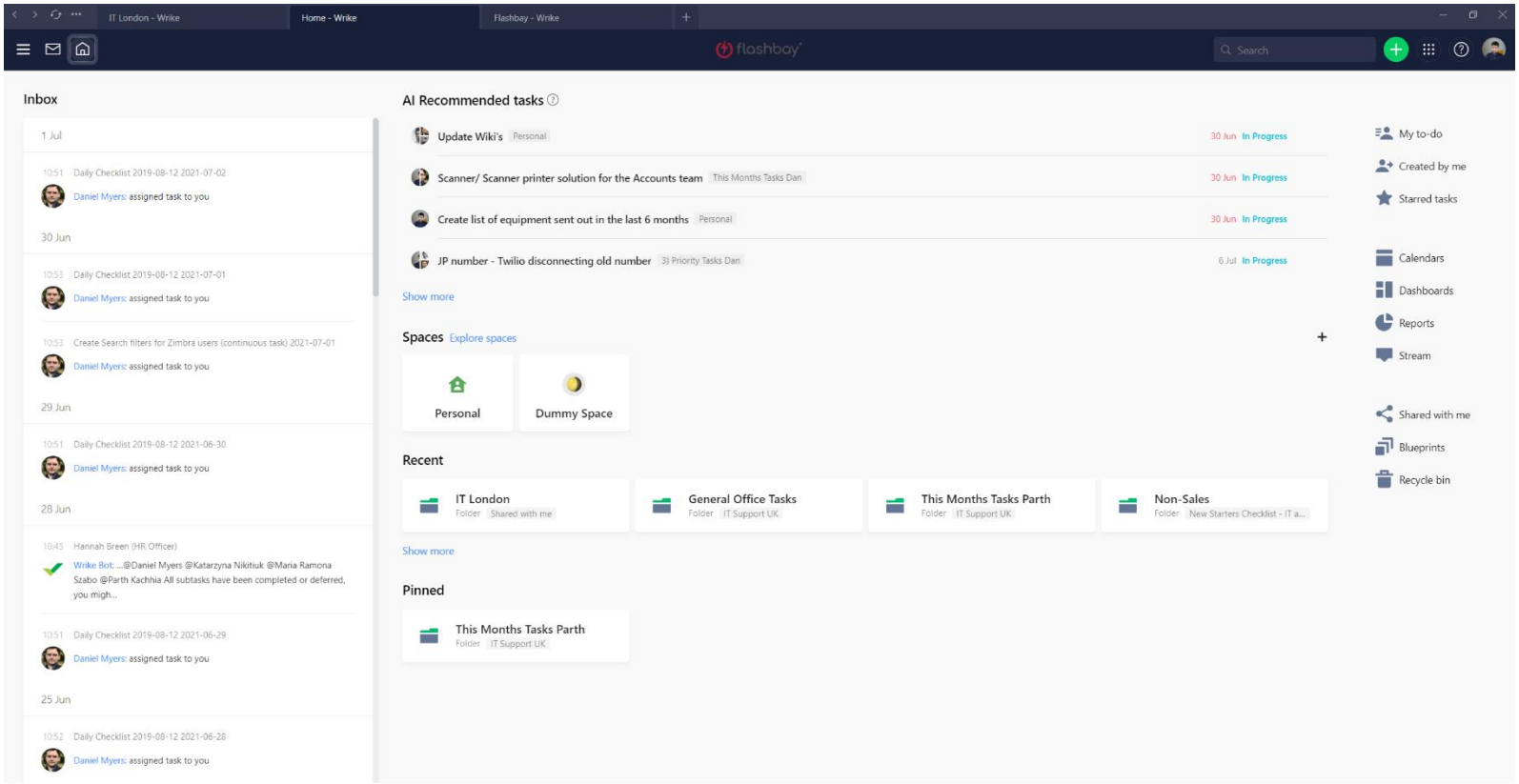
Introduction

Wrike is a digital work management tool that lets users track and coordinate projects, combining a simple user experience and interface with enough depth for power users.

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

Below is a quick look at what you see when you open Wrike.



Side Bar

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.

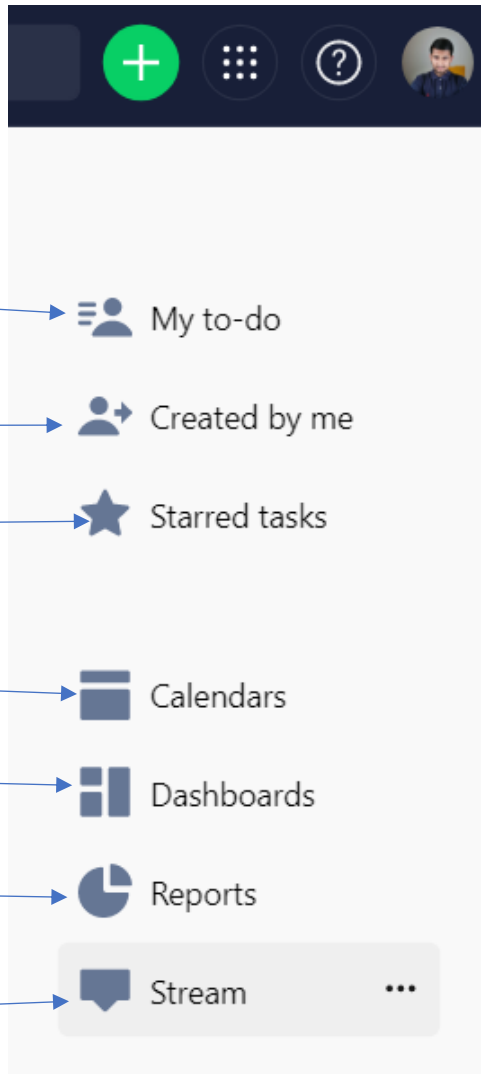
A quick overview of all tasks you have created personally.

Tasks that are starred can be accessed here.

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

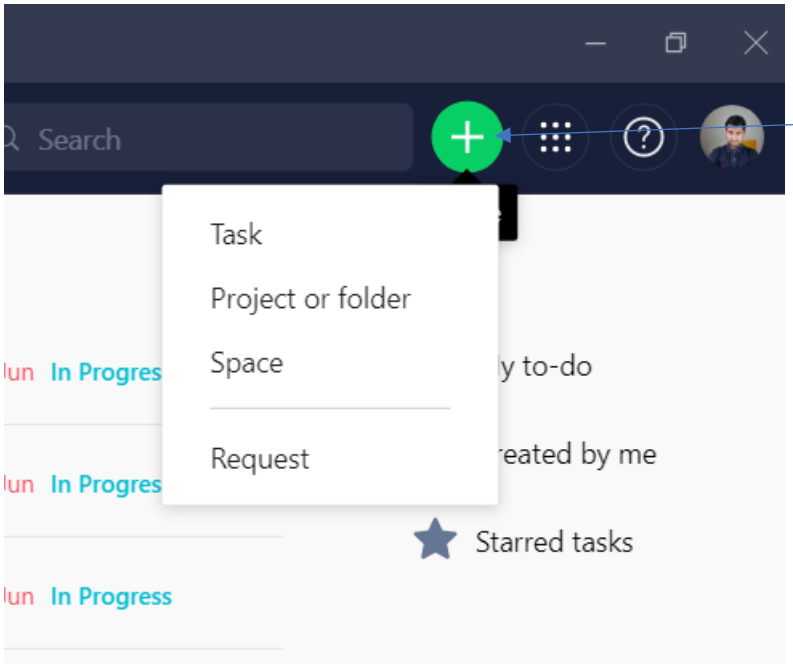
Generate real-time Reports on Tasks, projects & user activity.

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

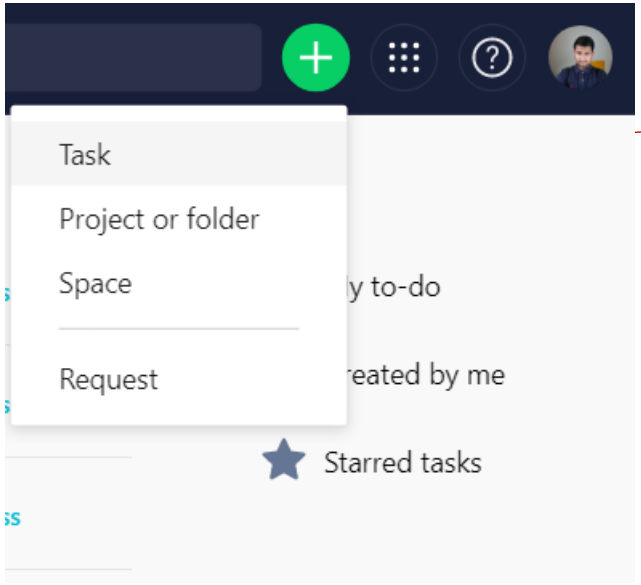


Creating a new task

In Wrike you can create tasks that will help you organise your workload. You will be able to assign tasks to colleagues who are involved in these tasks, set deadline & request updates.

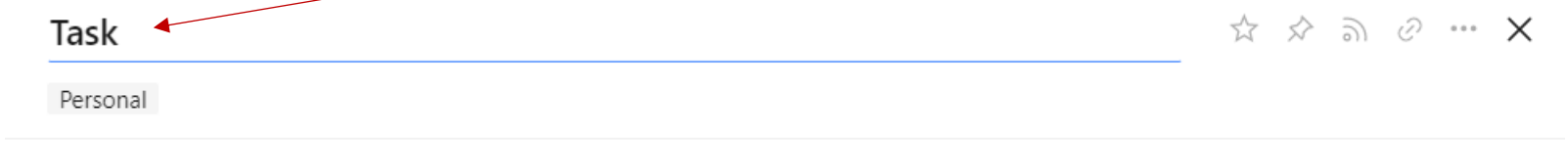


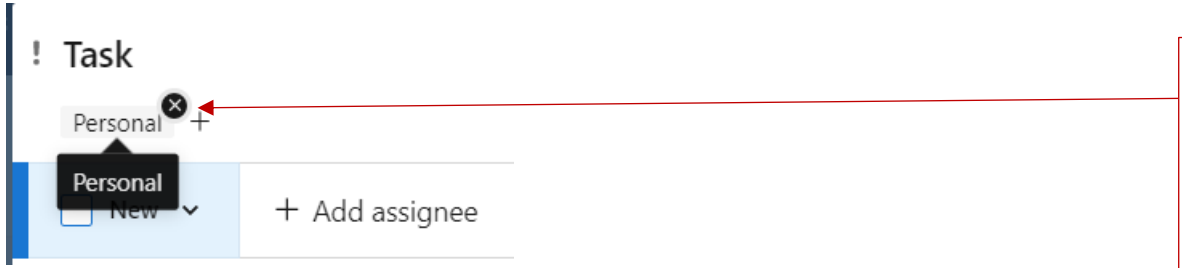
To begin creating a new task, press this button.



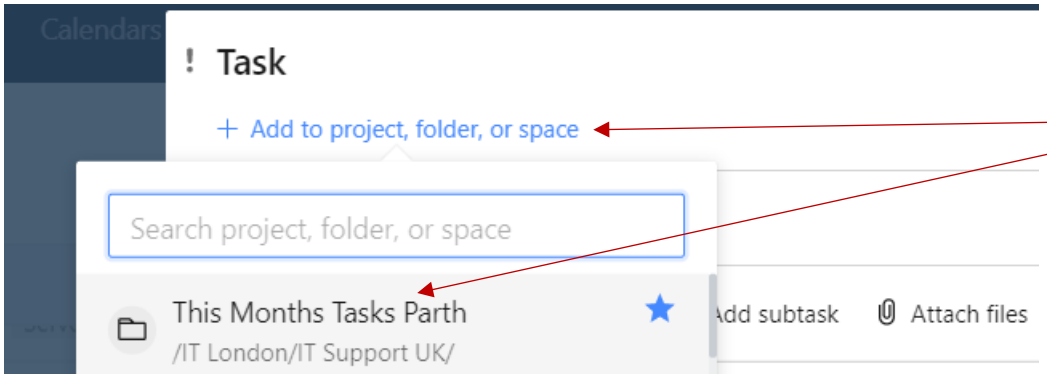
A dropdown menu will appear, click on the task option.

You will then need to enter the name of the task. This can be edited later if needed.

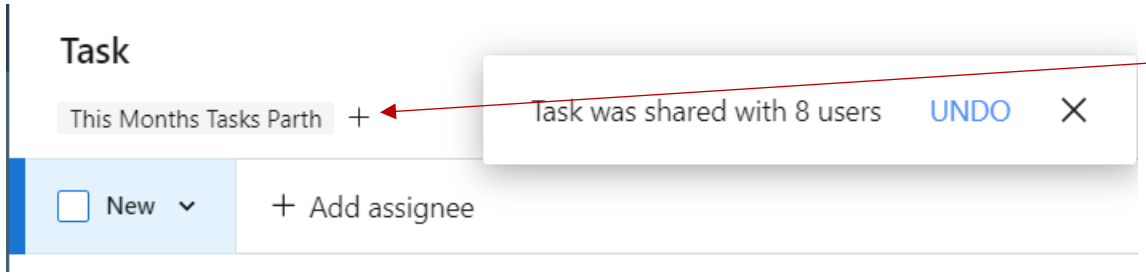




Once the task has been created, it is important to move the task out of your personal folder and into a folder relevant to the task. If you do not do this other users will not be able to find your task. To remove the task from personal, simply click on the "X" as shown.

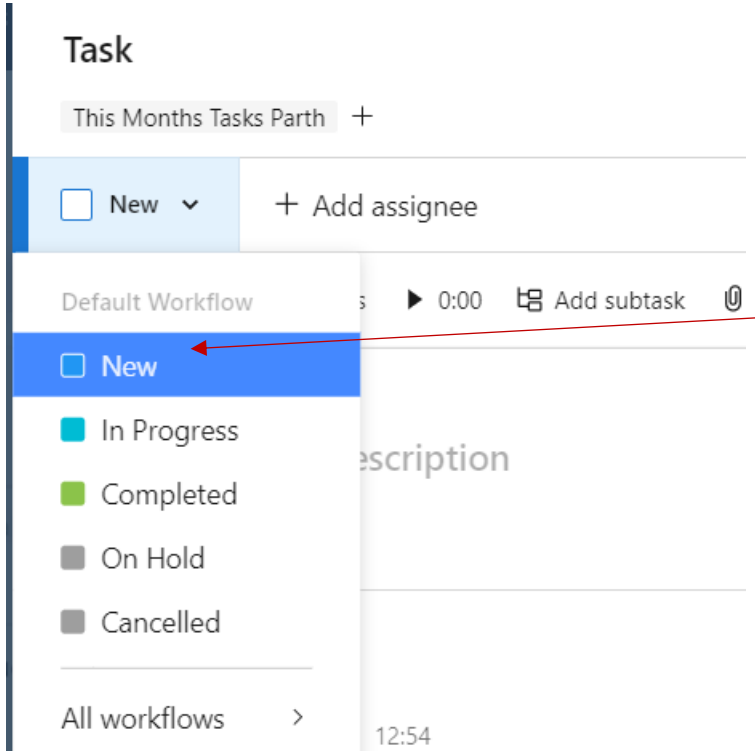


Once you have removed the folder from Personal you can click on "Add to Project, folder or Space" and assign to the relevant folder.



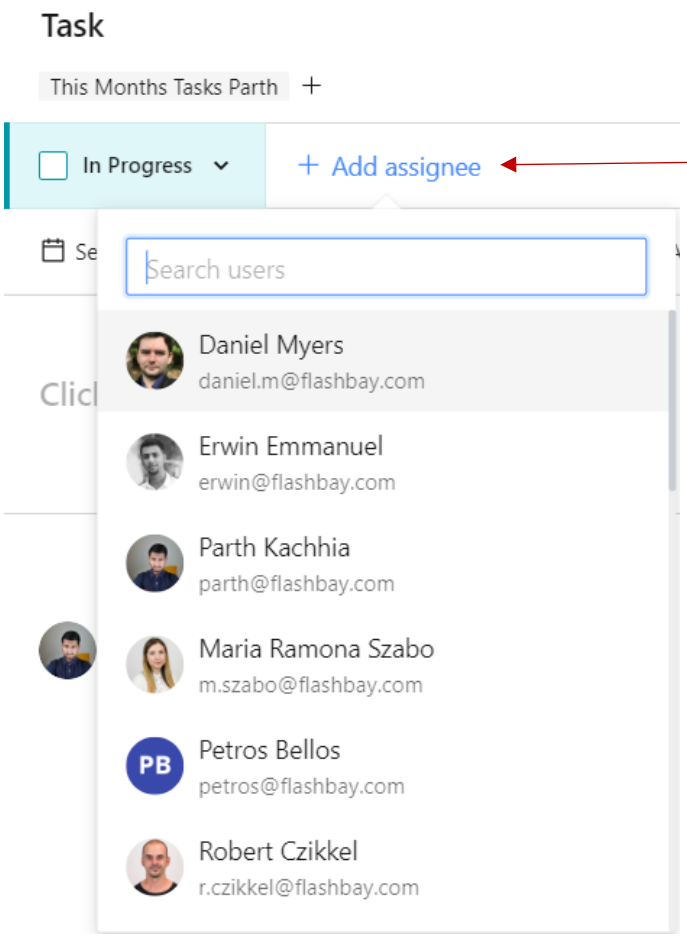
Now you will see the task has been assigned to a folder, you can add other folders by clicking here.

Task Status



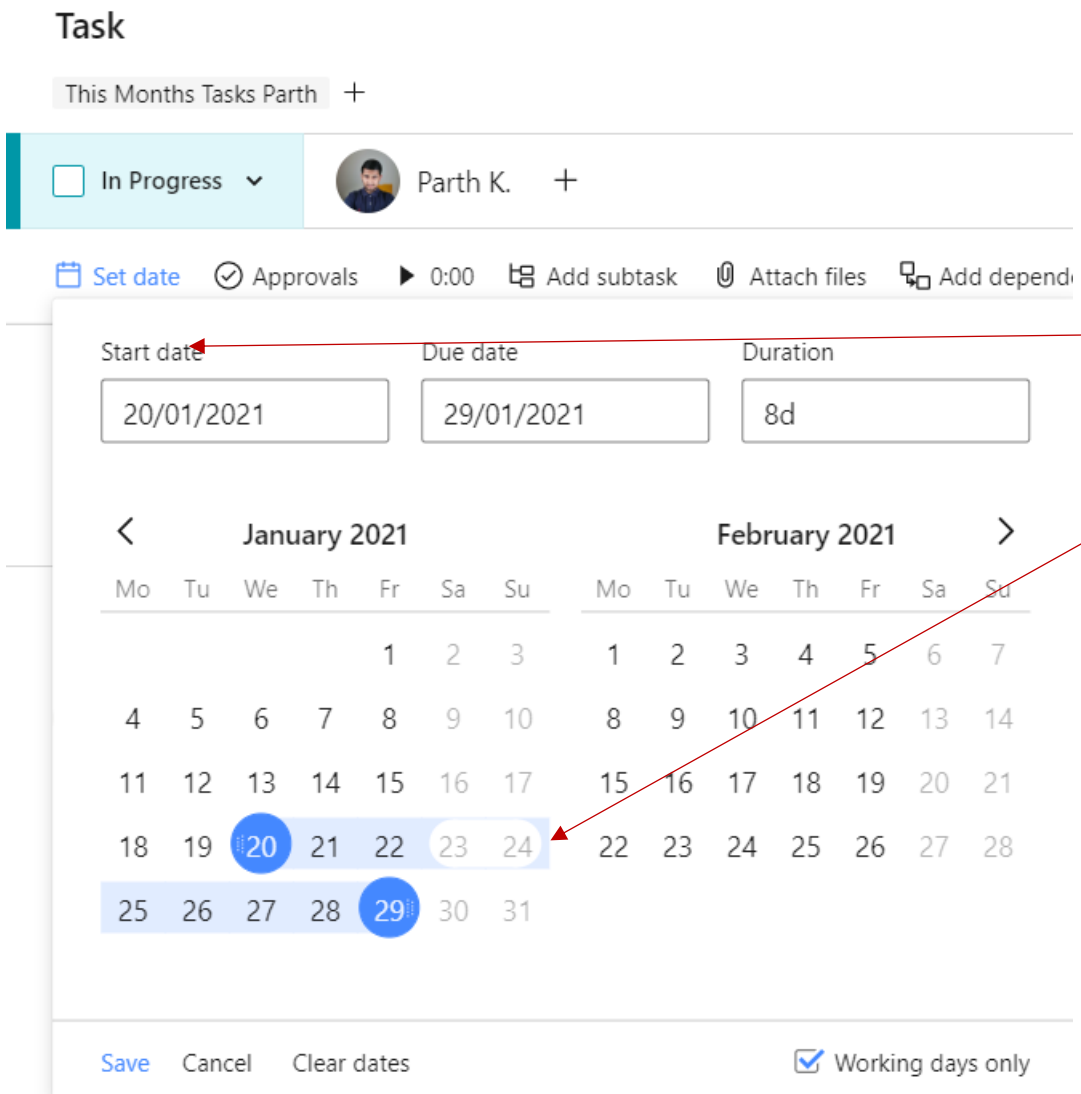
Now that the task has been created and assigned to the correct folders, the status of the task needs to be set. The options are 'New', 'In Progress', 'Completed', 'On Hold' and 'Cancelled'

Assigning Users



Now we can assign the tasks to the people who will be working on them, this can be done by clicking here. Multiple people can be assigned to a single task.

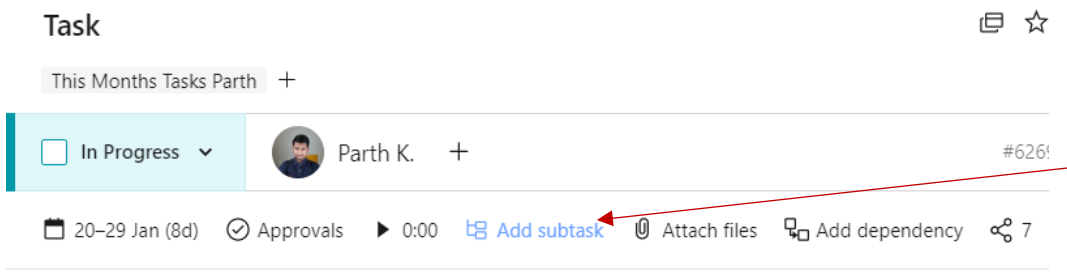
Setting Deadlines



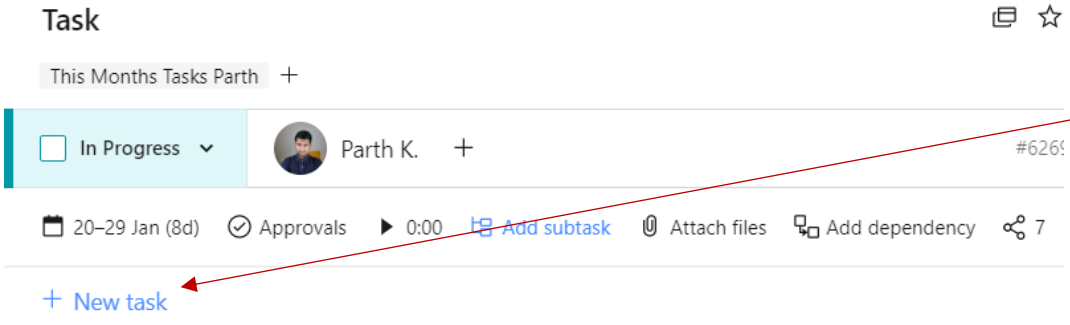
Now that you have assigned the users who will be working on this task you can set a deadline.

This can be done by clicking on “Set date” and configuring the date via the “Start date” and “Due date” boxes or by clicking on the dates in the calendar below.

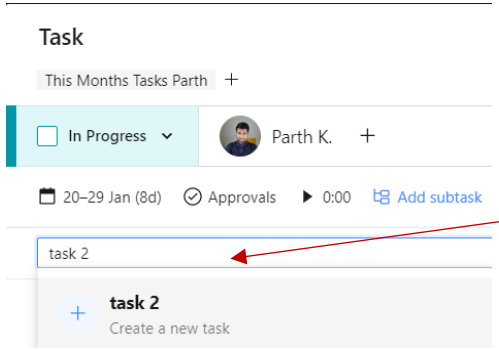
Adding Subtasks



You can also add sub tasks, this helps when trying to break down a task/project into sections for better visibility.

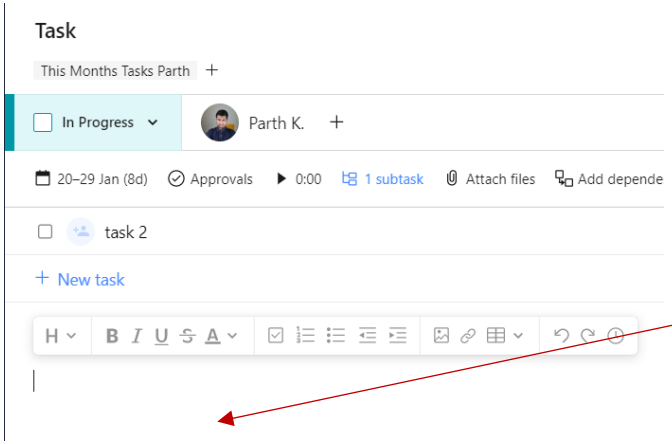


After clicking on 'Add subtask' you will need to click on "+ New task" to begin creating your subtask.

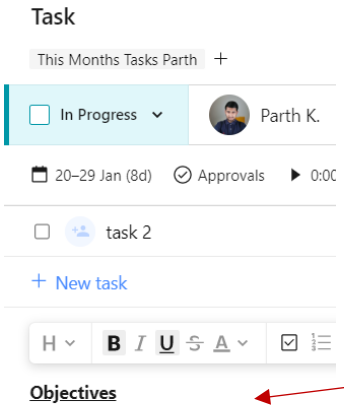


Type in the name of the task, then press enter. The subtask has now been created.

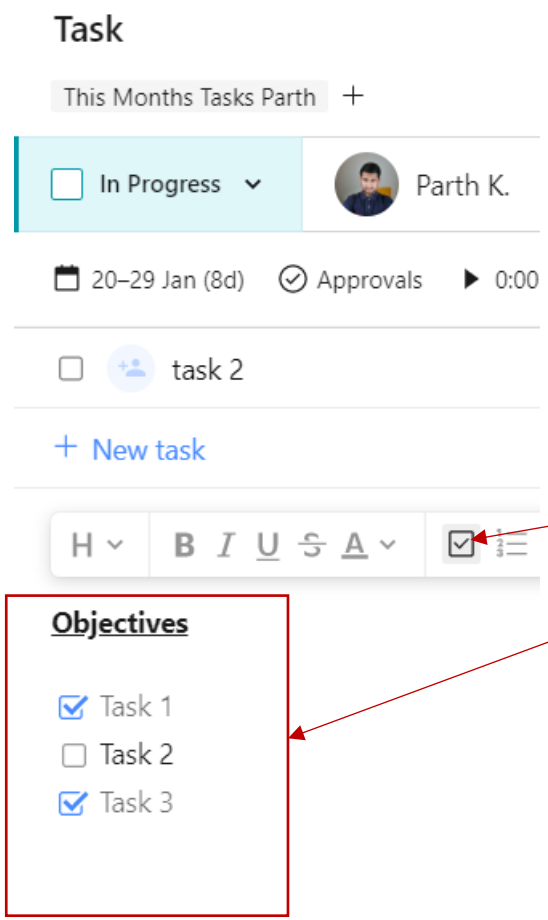
Adding Objectives/Descriptions



You can add objectives and create a check list from here, this will be visible to everyone the task has been shared with.



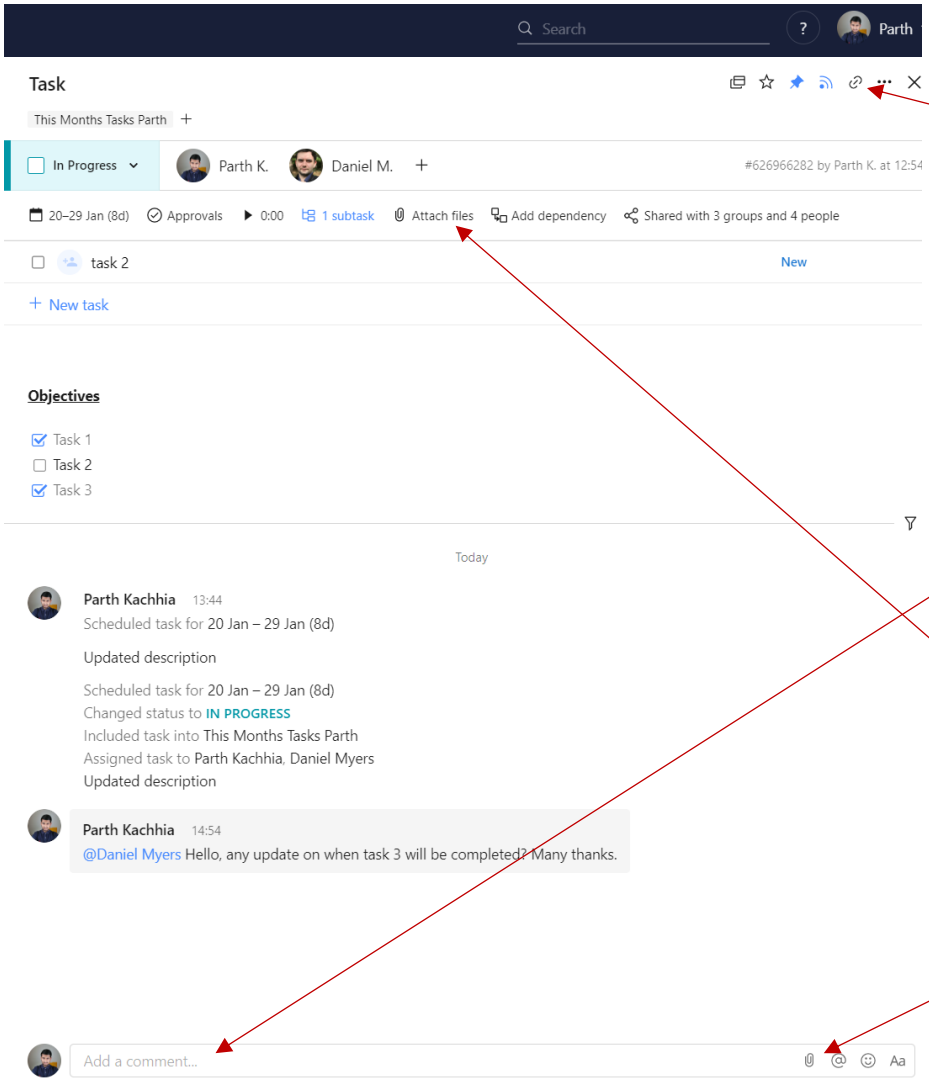
To add a description or a list of objectives simply click on the add description text and start typing.



You can also format the text to show as bullet points, numbers or check boxes.

Checkboxes are especially useful as it allows you and the other users on the task to check off objectives as they go.

Comments and updates



You can click here to find the URL link to this task. This will allow you to share your task with other users.

You can add comments to the tasks here. Always ensure you @mention @Followers & any specific individuals that needs to see your comments.

You can add attachments to the task at the top of the task or you can add attachments to a specific comment in the comment section at the bottom.