Wrike Client Manual

Office of University Marketing // Texas State University
# Table of Contents

**Introduction** .................................................................................................................................................................................. 3
  - Helpful Hints ................................................................................................................................................................................. 3

**Getting Started in Wrike** .................................................................................................................................................................. 4
  - Logging in to Wrike ........................................................................................................................................................................ 4
  - Request Forms ................................................................................................................................................................................. 4

**What happens next?** .......................................................................................................................................................................... 6
  - Photo Requests .............................................................................................................................................................................. 6
  - Projects ......................................................................................................................................................................................... 6
  - Consultations ............................................................................................................................................................................... 6
  - Publication Reviews ...................................................................................................................................................................... 7

**Using Email with Wrike** ................................................................................................................................................................... 8
  - Email Notification Settings .......................................................................................................................................................... 8
  - Respond via Email ....................................................................................................................................................................... 9

**Basic Navigation** .......................................................................................................................................................................... 10
  - Inbox View .................................................................................................................................................................................. 10
  - Project View ............................................................................................................................................................................ 11
  - The @mention Feature ............................................................................................................................................................. 14
  - Tasks .......................................................................................................................................................................................... 17

**Process – Request to Delivery** ......................................................................................................................................................... 19
  - Project Setup ........................................................................................................................................................................... 19
  - Timeline .................................................................................................................................................................................... 20
  - Client Review and the Proofing Tool ......................................................................................................................................... 21
  - Estimate ...................................................................................................................................................................................... 26
  - Delivery ....................................................................................................................................................................................... 26
  - Archive ....................................................................................................................................................................................... 26
Introduction

This manual aims to be a comprehensive guide to using Wrike as a University Marketing client. We'll cover topics such as basic navigation, understanding what's needed from you and communicating with University Marketing.

Helpful Hints

Throughout this guide, you'll find a number of handy pieces of information that can make using Wrike easier, more interesting and less hazardous. Here's what to look for:

Tips help you get more from Wrike.
These are tips and tricks that will help you be a Wrike wizard!

Notes are handy pieces of information.
These are for the extra tidbits that are sometimes necessary to understand Wrike.

Warnings help you not blow things up.
These are the tips that will help you avoid Wrike-related crimes.
Getting Started in Wrike

Logging in to Wrike and submitting a request is the first step. In this section, you'll learn about the Wrike login process and the available Request forms.

Logging in to Wrike

Start by clicking on the link on University Marketing’s website (umarketing.txstate.edu/contact/wrike). There is no need to set up an account or be invited — everyone with a Texas State NetID already has a Wrike account. You are simply activating it.

We also have a unique URL for Wrike. Use this to log in, save it as a bookmark and get into Wrike quickly!

wrike.com/sso/txstate

Request Forms

Once you’ve logged in to Wrike, you’ll need to submit a request form to start working with us. Click on the large green circle with a plus sign, then click “Request” to get to the list of forms.
Request Form Options

University Marketing has several forms used for various types of requests. Some of these will be familiar if you’ve worked with us before. Some are new or updated.

- **Consultation Request**: A short form to learn more about our services or explore a strategic consultation.
- **Creative Services Request**: To request most print and digital projects from marketing, you’ll use this form.
- **Photo Archive Request**: Need a photo that our photographers have taken? Use this form.
- **Photo Services Request**: If you want one of our photographers to take photos for you, this is the form to use. (Headshots are scheduled through TRACS: see umarketing.com/capabilities/photo)
- **Publication Review Request**: Use this form to request that Marketing review a publication that you’ve produced within your department.
- **Social Media Post Request**: To request that we feature an event or other content on the main university social media channels, use this form.

Still unsure which form to use?
The consultation form is the shortest, so it’s the best one to use if your request doesn’t fall into any of the categories.
What happens next?

Depending on the form you’ve filled out and the project you’ve requested, your next steps will vary.

Photo Requests

If you filled out a Photo Services Request or a Photo Archive Request, a task is set up in Wrike and assigned to our photographers. One of them will be in touch through an @mention comment to schedule your shoot or to follow up. You’ll get an email notification when they do this.

What’s the @mention feature?
It’s a way to talk to someone directly in Wrike. We’ll cover it in the Navigation chapter of this manual.

Projects

Request forms are reviewed and responded to weekly. In most cases, you will be notified that your project has been set up. Read through the Navigation chapter of this manual to learn more about how to get around the project. If we’re not able to fit your project into our current workload, we’ll let you know.

Our request management process includes several status changes. You may get email notifications letting you know we’ve assigned your project or added some internal comments. If we are commenting to you directly, we will use the @mention feature.

Requests are reviewed on Fridays.
If you submit a request late on a Friday you may not hear back for a full week.

Consultations

Consultation requests vary. You may be contacted to set up a meeting or gather additional information, or projects may be set up right away. Meetings will be scheduled via Outlook and any follow-up messages will happen in Wrike.
Publication Reviews

Publication reviews are converted directly into a project. A review will be set up and you’ll receive feedback from both our editor and creative director. Although you may get email notifications or see that we have left comments, please wait until someone messages you using the @mention feature to consider your project completed.
Using Email with Wrike

Email Notification Settings

Once you start using Wrike, you’ll see that you get a lot of email notifications. It’s helpful to turn some of these off. To get to your email notification settings, click on your name in the top right corner of your Wrike screen, then click on “View profile” in the dropdown menu that appears, and in the next screen click “Email addresses” on the left-hand side.

![Image of Wrike's email settings]

We recommend that you leave the option “Someone @mentions me or assigns me a task” checked. This ensures that you’ll get notifications when people directly message you or assign you work. All other notifications are optional. You’re better off turning them off to avoid the noise.
Respond via Email

In many project management tools, you can respond to an email and it will automatically update the project for you, without you having to log in. Wrike can do this, too! It just takes an extra step to set up, because of Texas State security measures.

We are required to use the “Single Sign On” method to log in to Wrike. This means you’re using the same NetID and password that you do for most other Texas State programs. If you’re using an alias email (where the name in front of “@txstate.edu” is not your NetID), the “respond to a task via email” feature will not work.

If you’d like to be able to respond via email and have it update the project for you, please email umarketing@txstate.edu, including both your NetID email address and your alias email address in the body text. We will manage the behind-the-scenes settings in Wrike. After this, you’ll still use your NetID to log in, but if you reply to an email notification with your alias email, it will update the project.
Basic Navigation

You will encounter two main views in Wrike: the inbox view and the project view. The inbox view is where you’ll see @mentions and proof reviews from the University Marketing team. The project view is where you’ll see all the details of your project. Navigating between them is where most Wrike confusion happens, so we’ll walk you through and point out the landmarks.

Inbox View

The Wrike inbox view looks like this: a list of messages directed to you in the left-hand panel, and the selected message plus description and comment sections in the right-hand panel.

When you click on a different message in your inbox, it’ll appear (with the rest of its related comment section) in the right-hand pane. The list of messages in your inbox stays where it is in the left-hand pane.

Inbox view lets you keep track of the messages that are coming directly to you, and if you click into Wrike from an email, it will take you to your inbox by default. Sometimes, though, you’ll want to look at the bigger picture, which is where the project view comes in handy.
Project View

Project view is set up the same way as inbox view — with left and right panes — but the big difference is the level of detail in the left-hand pane. It shows all the tasks and subtasks that make up your project:

This is where you can see important info such as due dates, task statuses and proofs. It’s also where members of the University Marketing team record their progress, make notes and ask questions to clarify the project.

What’s the difference between a project and a task?
A project is the big picture — producing a poster, for example. Tasks are the smaller activities that need to happen to complete the project: taking photos, writing the copy, designing how it’ll all look, sending it to the printer, etc.

So, how do you get to project view from your inbox?
Here’s your inbox view again. You’re looking at a comment about photography, but you want to check on the whole project to remind yourself what’s involved. **To get to project view, click on the project name**, which is in smallish letters at the upper corner of the right-hand pane (here, the project name is “17-000 UMK Marketing Project”):

You can also click directly into any of your projects from the sidebar on the far left of your Wrike screen:
If you’re lost and can’t see the list of tasks, look for the project name.
Find it on the far left sidebar of your Wrike screen or near the top of the right-hand pane. Click either of those and you’ll be able to see the tasks that make up your project.

Still having trouble — can’t find the project in your left-hand sidebar? It’s probably in a folder. You have a Wrike client folder, set up by University Marketing, where your projects live. It is always in the left-hand sidebar.

This folder’s name will be a three-letter code followed by your department’s name. The code is an abbreviation of your department. Here, that’s “EXP - Example Client.” Click the small arrow symbol to expand your client folder, and look for your project name.

Wait, where did the right-hand pane go?!
Sometimes you might end up with a screen like this:

Click on the small clipboard icon at the upper corner to get back to the two-pane project view.
The @mention Feature

The @mention feature is a way to communicate directly in Wrike. By tagging a person’s name with the “@” symbol, you send them a notification that appears in their email and their Wrike inbox. Without using the “@,” they may miss your comment — so please always use an @mention when you need to get our attention! (By the way, when we’re talking in person or by phone, describing this feature will sound like “at-mention”).

Use @mentions to check in with University Marketing staff, and watch for your own @mentions.
This is how we’ll ask you for more information or let you know about project updates.

To @mention someone, type in the comment section of a task or project. Make sure to put “@” right before the name, with no space. As you type the person’s name, a list of possible matches pops up — click the one that you want.
Here’s how an email notification will look when you get @mentioned. Clicking the “Open update in Wrike” button will take you to the inbox view of the task where the comment is.

![Image of email notification]

And this is what a notification looks like in your Wrike inbox:

![Image of Wrike inbox]

From the Wrike inbox, click anywhere on the message to see the inbox view of the task or project that’s associated with it.
You can keep these messages in your inbox as helpful shortcuts or reminders to work on a task. We recommend that when you have completed the work related to an incoming comment, you archive it. To do that, hover over the comment in your inbox and a little icon will appear at the upper right — click that to move the comment to your Wrike archive. You can always find archived messages later if you need them by clicking on the “Archive” link at the top of your Wrike inbox (then click back to “Incoming” to see new messages again). Similarly, you can move an archived message back to your inbox by hovering over it and clicking the “Unarchive” icon.

Please write any comments in the task that they relate to (click on the task name in the project view’s left-hand pane — “Photography,” “Writing,” etc. — and use the comment section that appears in the right-hand pane). If you aren’t sure where a comment belongs, write it in the Project Setup task:
Tasks

Tasks contain lots of information. Here, we’ll cover the various ways of viewing that info.

- **Task assignments.** The University Marketing project manager assigns tasks to our team members. In Wrike, icons with profile photos or initials show who is working on each task; hover over an icon to see the person’s name. Check these assignments to see who you need to @mention in any relevant comments (“Client Review” tasks will show who your project’s designer is — a key person for you to know).

- **Task statuses.** Each task can be marked with a status: Not Started, In Progress, Edits Needed, Completed, and so on. This lets us assess the state of a whole project at a glance.

- **Viewing by status.** Wrike’s default view is “All active” — all the tasks that are not completed appear in the left-hand project view pane. Once a task’s status has been changed to “Completed,” it’ll be hidden from this view. This means that as more of your project gets finished, it might look like parts are missing. But those tasks are not gone! To see them, hover over “All active” and click the little “X,” which will turn it into “STATUS: Any.”

> If you think that a task has disappeared, check the status view.
> Make sure that it’s set to “STATUS: Any” and the “disappeared” completed tasks should become visible again.
- **Sorting by date.** If the tasks in your project look all mixed up, they’re probably sorted in a non-intuitive way. Click the sort menu near the top of the left-hand pane and change the sort to “Date” to see tasks in chronological order.

![Sorting by date](image)

- **Expanding tasks.** Some tasks are composed of subtasks. If a task has a small right-pointing arrow, click it to expand its subtasks:

![Expanding tasks](image)
Process – Request to Delivery

Here’s a breakdown of what to expect throughout the life of your project.

Project Setup

Project setup is getting your project into Wrike, assigning the tasks to University Marketing team members, scheduling the project’s deadlines and collecting any necessary info from you. Straightforward projects may get set up right away. Other projects that need more discussion may involve a kickoff meeting (you may see this abbreviated “KOM”) between you, key members of your team and key members of University Marketing.

We’ll include your original project request form in the “Project Setup” task, so that everyone involved in the project is on the same page about your needs. There will also be a subtask for including notes from the kickoff meeting.

We may ask you to attach files (Word documents, PDFs, photos) for us to use as reference. These should go in the “Client Content Submission” subtask if there is one. (If there’s no such task, please attach your content in the “Project Setup” task instead.) To attach a file, click into the task and click “Attach files” in the right-hand pane.
Timeline

Keep track of your project’s deadlines by looking at the dates assigned to each task:

Most of these are deadlines that you can expect us to meet — but there will also be deadlines for you to meet in the “Client Review” task. The date on a “Proof to Client” task is when University Marketing will send you a proof to review. The date on a “Proof Due to UMarketing” task is when we need your feedback on that proof. Sending your feedback by the deadline keeps the project moving on schedule. If you cannot meet your deadline, send us an @mention.
Client Review and the Proofing Tool

Wrike has a built-in tool for adding comments to a PDF. (For purely text-based projects, we will attach Word documents and use Word’s review functions.) This is how we’ll get your feedback on our drafts.

When we’ve got a document ready for you to review, you’ll get a Wrike inbox notification. Click on the document to start reviewing it.

You will arrive in the proofing tool, which looks like this:
At the bottom of the screen, you’ll see a set of symbols in a row. These are tools for marking up the proof.

![Tool icons](image)

In order from left to right, these are:

- **Text highlight tool.** Allows you to highlight text in the proof.
- **Dot marker.** Places a dot at the point where you click.
- **Arrow marker.** Places an arrow at the point where you click.
- **Area highlight tool.** Draws a box when you click and drag.
- **Free drawing tool.** Draw free-form lines on the proof.
- **Color selector.** Use this to pick which color you’ll comment with.

After you’ve made some kind of mark on the proof, a comment box will appear on the right-hand side of your Wrike screen — type your comments or questions here. Always hit the “Enter” key to send a comment that you’ve typed in — if you don’t do this, the comment will not actually post.
Need to edit or delete a comment that you’ve made? Hover over the comment, click the “…” that appears, and then click “Edit” or “Delete.”

When you’re done reviewing the document, you need to let University Marketing know. Near the bottom of the screen, just above the markup tools, are two buttons: “Approve” and “Changes required.” Click the appropriate button depending on whether you approve the document as-is or need us to make changes to it.
To exit the proofing tool and get back to the rest of Wrike, click on the “X” near the top right corner of the screen:

Downloading a Document

Attached documents are always anchored in the middle of the right-hand pane of a project view. You’ll also see them appear in the comments section (the lower half of the right-hand pane) at the time that they get attached, but as more comments are added, the files may move out of view. That’s why the “file bar” in the middle is helpful. You can use either of these places to download a file.
To download from the file bar in the middle of the pane, hover over the image of the file.

A checkbox will appear just to the left of the file. Click it, and more options will appear. Click on “download.”

The other way to download a document is from the comment section. Hover over the image of the file, and more options will appear in an overlay. Click the small downward-arrow icon on the left side of the overlay to download the file:
**Estimate**

If your project involves a printing cost, the “Estimate” task and its subtasks will contain that info.

In the “Estimate for Approval” subtask, you’ll see a note including the project cost and the fund it needs to come out of. There will also be an attached PDF of the estimate. We’ll @mention you here so that you can approve all of this info. We need your approval by the date shown in the subtask. To approve it, write a comment @mentioning the person who posted the PDF estimate (you’ll be able to see their name.)

The “PO Process” subtask will contain the purchase order for your project. Here you’ll be able to see supplier and billing info.

**Delivery**

The “Delivery” task shows the final deadline, when we’ll give you your finished product. Please check this date when the project gets set up and @mention us if it’s not what you need. This date will get updated if there are any delays in the project.

Delivery can mean different things depending on what kind of project you have: delivering physical copies of print materials, attaching a Word document of suggested messages for marketing your department, going live on a website redesign or sending you a live link to a video feature.

In this task, either the designer or the project specialist will add files (if your project is digital) or confirm delivery (if your project is physical).

Congratulations, your project is done!

**Archive**

We archive University Marketing projects every 30 days. If you no longer have access to a product that we created for you, please email umarketing@txstate.edu; include the project name and number if you have it. (Project numbers are five numbers in the form XX-XXX followed by a three-letter code.)