



PROJECT MANAGEMENT

MAYOR'S OFFICE OF CRIMINAL JUSTICE

How to Get it **Wrike!**
May 2018



Getting Started with Wrike

What actions can I perform in Wrike?

All MOCJ members have been provisioned with access to Wrike



Each unit in MOCJ has at least one user with a Regular user license.



All other MOCJ members have been assigned a Collaborator user license.

• If you coordinate with External partners and would like to invite them to a specific project within the MOCJ workspace, please submit a request to:

Project Management Office (PMO)
Sarah Fuentes
sfuentes@justice.nyc.gov
212-416-9087

Collaborator



- ☐ Submit a Request Form
- ☐ Access tasks through List View, Table View, Timeline View, and Activity Stream
- ☐ Access My Work and Inbox
- ☐ See shared Tasks, Folders and Projects
- ☐ Comment on Tasks, Folders and Projects
- ☐ Change Task Status
- ☐ View Custom Fields and their values

Regular User

(access to collaborator features +)



- ☐ Create Wrike Reports
- ☐ Share Tasks, Folders + Projects
- ☐ Invite New Collaborators
- ☐ Edit Description Fields, Change Start/Due Dates
- ☐ Access Dashboard + Workload View
- ☐ Create + Delete Tasks, Folders + Projects
- ☐ Create + Edit Custom Fields + Values
- ☐ Assign Tasks

When should I use Wrike?



Depending on your needs, Wrike can be used to support:

- Personal + Team Task Management

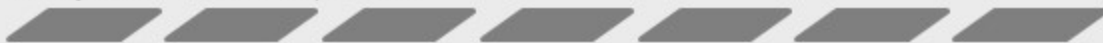


For Pilot members on the Bail Reform and MAP Teams, Wrike **must** be used to support:

- Project Management

How do I know if my assignment is a Project?

A Project is NOT a routine operation.



A Project is undertaken to create a unique product, service or result...



A Project requires a defined...

Beginning and End Date

Scope and Resources

Goals and Objectives



A Project requires the support of two or more of the following operations...

Justice Initiatives OR
Crime Strategies

Communications

Research

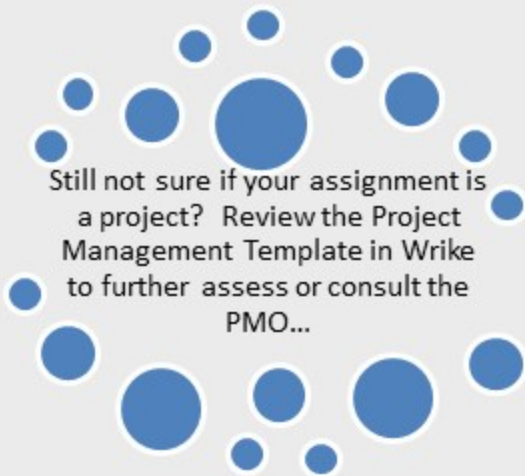
Legal

Operations (Contracts,
Budget, Ops)

Technology

External Agency

When should I use Wrike?

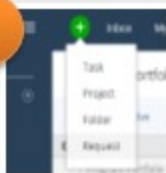


Still not sure if your assignment is a project? Review the Project Management Template in Wrike to further assess or consult the PMO...

<https://www.wrike.com/open.htm?id=214047447>

Initiate a New Project in Wrike

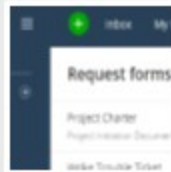
1



Select Request

2

Select Project Charter Form + Complete



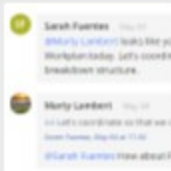
3



Project Template Auto-Loads + PMO is Notified

4

PMO will coordinate and assist in plan development



When do I use a Project vs. a Task?

Projects



- Use **Projects** to manage a group of **tasks** that are part of a larger goal
- Track the project status + due dates separately from underlying tasks
- Think of these as "temporary"

Subprojects



- Use **Subprojects** as a way to classify project components
- Referencing the operational unit responsible for the underlying **tasks** is always a good place to start

Tasks



- **Tasks** are activities you need to complete
- Tasks can be standalone activities or part of a larger project
- Complex tasks should be assigned **subtasks**

Subtasks



- **Subtasks** are the steps you need to take to complete a task
- Each subtask should be assigned to the responsible party

Projects vs. Tasks in List View

The screenshot illustrates the hierarchy of tasks in the NYC Criminal Justice system. On the left, a sidebar lists various projects and folders. An orange box labeled "Folder" points to the "Training Workplan" folder. An orange box labeled "Project" points to the "[Training] 1. MOQ - PL..." project. The main area shows a list of tasks under the "[Training] 1. MOQ - Planning" project. An orange box labeled "Task" points to the "[Training] A. Purpose + Scope" task. An orange box labeled "Subtask" points to the "[Training] a. Establish Project Statement" subtask. The right panel shows the details of the "[Training] A. Purpose + Scope" task, including a list of subtasks and a description field. An orange box labeled "Subtask" points to the "[Training] a. Establish Project Statement" subtask in the list.

Folder

Project

Task

Subtask

Subtask

NYC Criminal Justice

Inbox My Work Dashboards Reports Stream

Filter

MOQ

Training Workplan

[Training] 1. MOQ - PL...

[Training] 2. MOQ - O...

[Training] 3. MOQ - Le...

[Training] 4. MOQ - Te...

[Training] 5. MOQ - Sc...

[Training] 6. MOQ - Re...

[Training] 7. MOQ - Pe...

[Training] 8. MOQ - Pr...

Close Rikers Workplan

Program Portfolio

Bail Reform

Adolescents in on Bail ...

Bail Expediting Workpl...

End Money Bail Workp...

Failure to Appear Wor...

FTA - Research Advi...

1. Scope of Enga...

2. Vetting

3. Approvals

4. Documentation

5. Continuance

Tutorial videos

Total: 3 tasks, 12 subtasks

What's New Mobile apps Add Users Help & Support

Task

[Training] 1. MOQ - Planning

LIST BOARD TABLE TIMELINE STREAM TIMELOG MORE

STATUS: Any TO: All By Priority -

New task

TC [Training] A. Purpose + Scope Pending May 10

[Training] a. Establish Project Statement

[Training] b. Develop Objectives, Goals and Key Performa... Pending May 21

[Training] c. Outline Milestones Pending May 22

[Training] d. Determine High Level Project Costs and Con... Pending May 23

[Training] e. Submit Charter Pending May 24

[Training] B. Planning In Progress May 15

[Training] C. Implementing + Evaluating Pending May 21

[Training] A. Purpose + Scope

[Training] 1. MOQ - Planning

Pending TC Tina C. + by Sarah F on May 04

May 04 - May 10 (5d) 0:00 5 subtasks Attach files 6

In Progress [Training] a. Establish Project Statement

Pending [Training] b. Develop Objectives, Goals and Key Performance In... May 21

Pending [Training] c. Outline Milestones May 22

Pending [Training] d. Determine High Level Project Costs and Contractl... May 23

Pending [Training] e. Submit Charter May 24

+ New subtask

Click to add the description

Week ago new

Marty Lambert May 04 Assigned task to Tina Chiu

Add comment



Best Practices

Naming Conventions

- High-level folders have been created for you

• Ex. *"Bail Reform"*

Folders



- Use a descriptive name for your overarching workplan

• Ex. *"Failure to Appear Workplan"*

Projects



- Begin subproject names with your workplan acronym

• Ex. *"FTA – Research"*

Subprojects



- Use alpha-numeric indicators to organize tasks in work order

• Ex. *"A. Project Planning"*

Tasks

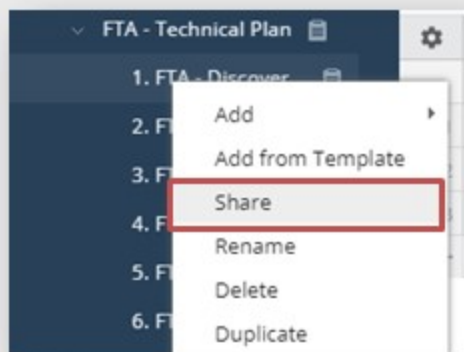


Orphaned & Backlogged Tasks

Orphaned Tasks

If you assign a task without sharing the parent folder, the task will appear in the assignee's workspace as an "orphaned" task.

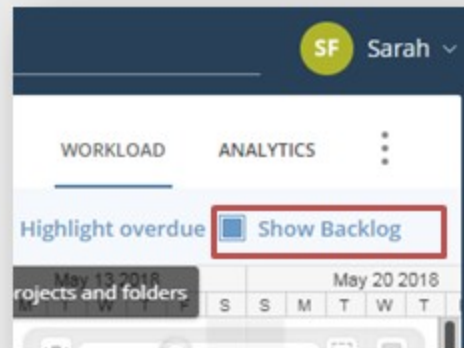
This causes tasks to have no context and can easily be forgotten.



Backlogged Tasks

Tasks without a deadline are automatically grouped into a Backlog category.

Keeping things in Backlog could be useful if you are planning far into the future and dates are TBD, but don't forget to revisit.



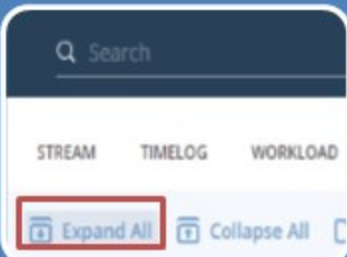
By default, Wrike filters out completed tasks and collapses subtasks.

FTA - Research Advisory Council



Clear Filters

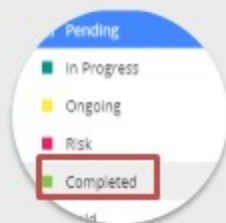
- Hover over the active tag, an "X" appears. Clicking on it clears the "active" tag. All tasks residing in the folder will appear regardless of their status.



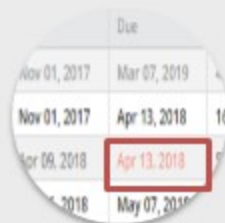
Expand All

- When accessing the Table view, select the "Expand All" option if you need to view the full scope of a project.

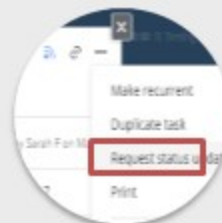
Overdue Tasks and Task Management



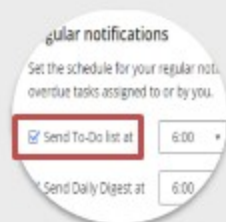
The transparency of Wrike works best when task **Status** codes are regularly updated.



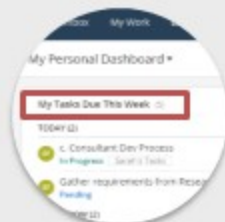
When a task is **Overdue** the deadline turns **RED**. Use this as an indicator to update, reschedule or cancel a task.



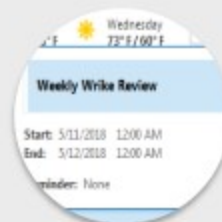
If you need an update on someone else's task, use the **"Request Status Update"** feature.



Under Profile Settings, leverage **eMail Alerts** to receive approaching deadline notifications



Leverage the **Personal Dashboard** and **Report Scheduling** features to stay up to date.



If you are an infrequent Wrike user, schedule some time in **Outlook** to review your tasks Weekly.

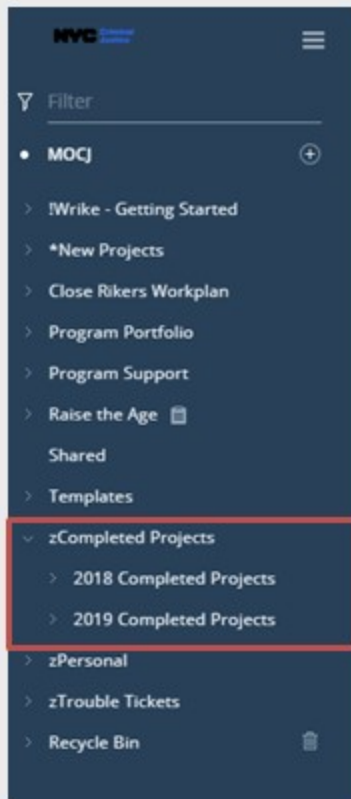


Completing a Project

Congratulations, you've Completed a Project!

When you no longer need visibility to a completed task

Move your project to the Completed Projects folder





Questions

The image shows a screenshot of the NYC Criminal Justice Wrike interface. On the left is a dark blue sidebar with a 'Filter' section containing a list of items: 'MOCJ', 'Wrike - Getting Started', '*New Projects', 'Close Rikers Workplan', 'Program Portfolio', 'Program Support', 'Raise the Age', 'Shared', 'Templates', 'zCompleted Projects', 'zPersonal', 'zTrouble Tickets' (highlighted with a red box), and 'Recycle Bin'. The main content area is titled 'Request forms' and lists 'Project Charter' and 'Wrike Trouble Ticket' (highlighted with a red box). Below the list is a large orange-bordered box with the text: 'Submit a Trouble Ticket OR Contact the Project Management Office Sarah Fuentes sfuentes@justice.nyc.gov 212-416-9087'. At the top of the main area, a red box highlights a '+' icon, with a tooltip showing 'Folder' and 'Request'. The right-hand pane displays the 'Wrike Trouble Ticket' form, which includes fields for 'Date Issue Started *' (05/07/2018), 'Screenshot' (with a 'Choose files' link), 'User Operational Unit' (Technology), 'User Phone Number *' (212-416-9087), and a 'Description of Issue' field containing the text 'I am unable to access the MOCJ workspace.'

Folder
Request

Request forms

Project Charter
Project Initiation Document

Wrike Trouble Ticket
Having issues with Wrike? Feel free to submit a ticket to the MOCJ Wrike Administrator. For alternative support options, you can also use Wrike's Help & Support Portal located at the bottom right-hand side of your Wrike workspace.

**Submit a Trouble Ticket
OR
Contact the
Project Management Office
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Date Issue Started *
05/07/2018

Screenshot
Choose files or drag & drop them here
If possible, please attach a screenshot of the issue here.

User Operational Unit
Technology

User Phone Number *
212-416-9087
555-555-5555

Description of Issue
I am unable to access the MOCJ workspace.