Using MeisterTask™ with iNautilus™

Administrator (Primary User) Instructions

MeisterTask is the tool we recommend to manage iTasks™ and Propellers for moving toward your iDest™ in the iNautilus™ methodology. We recommend a Pro or Business account for at least the primary user (other users in your organization can use a free/Basic account as long as they will need access to no more than 3 "projects" and as long as you do not need to administrate a large team.) Please register for an account using the following link and use the discount code GREENFIRE for a 10% discount of your first month (if you are a new Admiral Program client we can also provide a one-month free trial. Please email admin@greenfireinnovations.com to receive the link for the free trial month):

Go to MeisterTask: https://www.meistertask.com/?r=977642

Pro vs. Business… For the purposes of the iNautilus, the only difference between the accounts is the Timeline view (only available in Business). If you prefer to have this Gannt-style view of your scheduled iTasks, then you will need the Business level account. Otherwise, the Pro account will suffice. Of course, there are other features of the Business account you might want to use in your organization… Feel free to explore those and choose accordingly. If you received a free trial month, you will have the Business level account and can explore these features to determine their usefulness to you. If you decide they are not, you can simply downgrade to a Pro account before you begin paid usage.

First Steps

Once you have created your account, please import the Client Template – iRoutes file into your account:

1. Download the template from (https://template.inautilus.net) and save to your computer. (If you have not done so already, you will need to create an account on the Greenfire Innovations website to download the file.)
2. You will need to Extract the .json file from the downloaded .zip file. Simply open the .zip file, then select "Extract All". Note the location where you save this extracted .json file.
3. Login to your MeisterTask account.
4. Go to the Dashboard.
5. Click the "+" next to the Projects dropdown in the left sidebar.
6. Select "Import"…
7. Select "MeisterTask"
8. Click the "Choose .json file" button.
9. Find and select the .json file you downloaded and extracted to your computer.
10. Click "Continue".
11. Click "Done". The new iRoutes template project will be added to your Projects within a few minutes.
12. Click the "i" next to the newly added template project.
13. Rename the "project" with your company name and iRoutes (e.g. "XYZ Company – iRoutes") by
14. At the bottom of the same screen, click "Add Member"
15. Invite your Navigator to your "project" by typing his/her email address.
16. Click "Invite"

17. Click “Done”

Set up the Agenda view

Your Agenda view is where you will operate from on a regular basis. In order to utilize this effectively with the iNautilus, there are a few steps to set it up. The Agenda view is unique to every user, so we cannot provide it in the template, and changes you make to your Agenda will not be universal throughout your organization (meaning each person who is using MeisterTask for your iNautilus will need to follow these steps):

1. Open the Agenda view (accessible from the Dashboard OR by clicking Ctrl-Shift-O from the project/tasks view.
2. You should see 4 default categories (these are called “pins”), Focus, Upcoming, To Reply, and Waiting For. The Focus pin cannot be renamed/removed at this time, so please drag it all the way to the right.
3. Rename the Upcoming pin (just click on the name to edit it) to Upcoming Propellers.
4. Add a new pin (click the + icon on the far right).
5. Name the new pin Propellers.
6. Drag the Propellers pin all the way to the left.
7. Feel free to use/change/remove the other pins or add more. The only 2 we will need for the iNautilus methodology are Propellers and Upcoming Propellers

Set Up iRoutes

The iRoutes project is where you will track your progress (and that of your team) and handle iTask management. The columns are called “Sections” in MeisterTask, and we will be using them to represent each iRoute currently being worked in each Current on your Radar. The name of each Section should be the iPoint you are progressing toward right now.

1. Open the iRoutes project.
2. Rename and/or add additional Sections for each of your next iPoints (use your Radar)
3. Using your iRoutes Builder worksheets, begin adding iTasks to your Section (iRoute) in MeisterTask.
    a. Although a matter of preference, I recommend using 4 types of iTasks, Get, Go to, Call, and Send. If you choose this method, every iTask will begin with one of those words. They are action words, but more importantly they allow you to bundle or group your iTasks into blocks of similar activity.
    b. Keep iTasks manageable… each should be a single action step (handled by one person, not divisible into smaller tasks of more than a few minutes each, and easy to recognize completion).
    c. If it is a Propeller iTask, use the Pin button to mark it as such.
    d. Complete as much information in the task as you can (to whom it is assigned, Tags, Due Date, Scheduled Dates, etc…)
    e. Tasks in MeisterTask can have checklists within them. Use this with some caution. If your iTask is becoming more of a “project”, then split it out into multiple iTasks. Good uses of the checklist is to ensure you have compiled all of the components of a task or

even steps to complete an iTask provided that they are small steps and only require a few minutes each (no more than 10 minutes as a rule of thumb).

4. If it is an appointment, put it on your calendar. MeisterTask is for task management (so maybe the items you need to complete to get ready for an appointment), but let your calendar be your time management tool.

Set Up Tags

Create Tags for each of your Currents so that you can easily find/sort iTasks later.

1. Open the iRoutes project.
2. Open the Project Properties with the "i" next to the project name at the top of the screen.
3. Select "Tags" from the toolbar.
4. Click "Add Tag"
5. Type the name of your Tag (use a short summary you will recognize for each Current on your Radar). For example, if your Current involves constructing a new office building for your business, you might have a Tag for "New Office".
6. You can create other Tags as well; MeisterTask allows for multiple Tags per task. So maybe would want to create departmental Tags. Feel free to do what works for you, and if you are not sure, then just create your Currents; you can always come back and add more Tags later.

Project Groups

With the Pro/Business plans, you can organize your projects into Groups. For me, I separate business and personal via groups. If you want to utilize this function:

1. On the Dashboard, create a new project group with the "+" next to "projects" on the left-hand menu.
2. Select "New Project Group".
3. Give the Group a name (i.e. "Personal", "Work", "Business", or whatever makes sense to you).
4. You can simply drag projects into the group(s) with the 3 lines that appear when you mouse over the group name in the Dashboard.

Add "Complete" Project

In order to keep your iRoutes/iTasks organized by iPoint, when the iPoint is achieved you will need to move the entire section to the Complete project. Then you will create a new section for the next iPoint in that Current.

1. On the Dashboard, create a new project with the "+" next to "projects" on the left-hand menu.
2. Select New Project.
3. In the name field, type "Complete".
4. You do not need to invite anyone to this project… it is simply a way to archive your iTasks while maintaining the iNautilus structure.
5. If you are using project Groups, then feel free to move this project into the appropriate Group on your Dashboard.

Automations

With the Pro/Business plans, you can automate some functions when tasks are added to (or moved to) a section. Tasks can be assigned, moved, time tracked, tagged, have checklists added, have status updated, have due date updated, or be set to a recurring task automatically. It is recommended that you use the tagging automation for each iRoute. The others can be used as it benefits you and your team. Any tasks added to Sections with an automation you have created will have that automation run on them (even if the task is created by someone in your organization with a free account).

1. Mouse over the name of the Section (iPoint) and select the down arrow that appears.
2. Click on “Automations”.
3. Click “Add Automation”.
4. Click “Update Tags”.
5. Select “Add these Tags”
6. Select the corresponding tag you created (see Set Up Tags above) for this Current along with any other Tags you would like to apply to iTasks in this Section.
7. If you already have iTasks in the section that need to be tagged, you can select “Run this action on all existing…”
8. Click “Done”.
9. Repeat this process for all of the Sections in your iRoutes project.
10. If you want to add other automations, feel free to do so.

Invite Your Team

There are 2 ways to include your team. If you want to provide the Pro/Business plan for them (so they too have unlimited Projects, Automations, the Timeline view, and/or you want Team Admin functionality such as roles/permissions), you can add them as Team Members which is billed per user to your MeisterTask account. Otherwise, you can simply invite them to your Project, and they can create a free (Basic) MeisterTask account (limited to 3 projects and without the features mentioned above). You can also provide paid levels for some people and invite others with free accounts.

Paid Pro/Business Team Invites

ANY USERS ADDED THIS WAY WILL INCUR MONTHLY USER FEES EQUAL TO YOURS AND BILLED TO YOUR ACCOUNT.

1. From your Dashboard, click your user icon in the top right corner.
2. Click “My Account” under your name.
3. Click “My Team” on the left menu. If you don’t see the menu, click the hamburger menu (3 horizontal lines) in the top left.
4. Click “Invite User”.
5. Type his/her email address and a message if you want.
6. Click “Invite”
7. Repeat for each user in your organization for whom you want to provide Pro/Business level accounts.

Free Basic Team Invites

1. Open your iRoutes project.

2. On the far right, under your name, click the "+".
3. Enter the email addresses you want to invite (or the group if you are using that functionality) and a message if you want.
4. Click "Invite".
5. You can repeat this for another project, but do so judiciously. Basic (free) accounts are only allowed 3 projects, and your team may want to use their account for other things (tracking other work unrelated to iRoutes and/or personal items.)

Final Notes

- Live in the Agenda view. That is where you will see your Propeller(s) for the day, upcoming Propellers, iTasks due today, and those that are due soon.
- For a list of keyboard shortcuts that make using MeisterTask a little easier and quicker, simply press the "/" key.
- There is a free MeisterTask app for Android and iOS that will allow you to use manage your iTasks from your phone too.
- If you are planning to use MeisterTask for all of your company's task management, you will want to create another Project for items unrelated to your iRoutes. You can share this Project (for team task management) or keep it private to track your individual work (or do both). Also, if you want to use MeisterTask for personal task management, that could be another private project.
- If it is beneficial to you or your organization, MeisterTask also provides time tracking functionality.
- Automations (available in Pro/Business plans) are set per Section in each Project. The only exception to this "rule" is recurring tasks… those are unique to the task.
- The User Manual for MeisterTask is available on the Greenfire Innovations website. Look for it in the iNautilus Resources at https://www.greenfireinnovations.com/inautilus-resources-1