

Using MeisterTask™ with iNautilus™

Team 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 decide to use the Pro or Business plans:

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 for your work... Feel free to explore those and choose accordingly.

First Steps

Once you have created your account, please ensure that you have the iRoutes project showing on your Dashboard (this should be automatic if you were invited from your administrator). If not, please request access from your administrator, and you will receive an invite.

Set up the Agenda view (Pro/Business Plans Only)

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 that was shared with your administrator, and changes you make to your Agenda will not be universal throughout your organization (meaning each person who is using MeisterTask for the 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. You can pin a task by dragging it to the Propellers or Upcoming Propellers pin in the Agenda view or by clicking the pin icon in the top right of any open task.
8. 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.

Agenda view for Basic/Free plans

Your Agenda view is where you will operate from on a regular basis. The Agenda view is unique to every user, so changes you make to your Agenda will not be universal throughout your organization.

1. Open the Agenda view (accessible from the Dashboard OR by clicking Ctrl-Shift-O from the project/tasks view).
2. You should see 2 default categories (these are called “pins”), Focus and To Reply.
3. The Focus pin is where you will put your Propeller(s) for the day. (A Propeller is the most important item you need to focus on today for achieving your goals or those of the company.)
4. You can pin a task by dragging it to the Focus pin in the Agenda view or by clicking the pin icon in the top right of any open task.

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

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 work, you will want to create another Project for items unrelated to your organization’s 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. Remember that the free Basic plan only allows for 3 projects.
- 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/inutilus-resources-1>