

Introduction

If you're ever unsure about what you should be doing, chances are you'll find the answer on ClickUp—the project management platform *of choice* for IVCRC.

Unfortunately, ClickUp doesn't tell you what you should do *outside* of IVCRC, so if you're clueless about your life as a whole, I'm afraid you're outta luck.

Why do we use ClickUp? Is it because it's awesome? Is it because it's got features no one else has? Is it because it's the Slack of task management?

Well, no. We use it because AS pays for it, and we *might as well* use it. There are, in fact, a few things about ClickUp that I find a bit frustrating and baffling.

That's not to say ClickUp is *horrible*. On the contrary: It's far and away superior to tracking our tasks with a document or a spreadsheet, and there are a lot of things to like about ClickUp. And if nothing else, you get to put it on your résumé, because pretty much every company uses some sort of special tool to manage tasks.

[pause]

Setup

Access

The first step, as always, is to sign in. Go to clickup.com and click on “Log in” at the top right.

Just like Slack, you should do a password reset at this point. Just click on “Forgot Password?”, put in your email, and click “Send me the link.” Again, you should use the version of your email that has the “AS” part after the “at” sign. For example, if I wanted to reset my password, I'd put ivcrc.internalchair@as.ucsb.edu.

Once you're done, check your inbox, come up with a new password, and log in. Pause the video now to get that taken care of.

[pause]

Downloading ClickUp

Like with Slack, we highly recommend downloading ClickUp on all of your devices. It's not so much that you can keep up-to-date with notifications like last time; rather, ClickUp seems to suffer from less lag after you've downloaded it. Yeah, ClickUp doesn't run nearly as well as Slack. Basically, download for performance improvements.

To download, go to clickup.com/download, and you should be able to find a bunch of download links. Pause the video here and take some time to take care of your downloads. Once you come back, I'll switch over to the desktop version.

[pause]

Settings

Your next stop should be the settings page. You know what they say: Settings first, fun later.

To get to the settings, click on the two circular images in the lower-left corner—where the workspace and profile images are. Then go to “My Settings” at the top of the window here.

Once you're here, click on “Workspaces” on the left sidebar, and make sure you're signed into the AS Workspace. If you're not, contact your department chair to be added.

Now go back to “My Settings.”

- Add a profile picture.
- Change the name to yours.
- Change your color theme to something you like.
- Make sure the Language & Region settings look good to you.
- I think I've left most of these preferences in their default settings, with the exception of “Flyout Toast Message.” I find these a bit annoying, so I have this disabled. But your mileage may vary.
- And then scroll back up to two-factor authentication. We've said it twice already, but here we go again: Turn this on! Extra security! Stop hackers! I mean, we can't force you, but you're doing yourself a disservice if you don't listen to us.

Anyway, pause the video here and update all of your settings. Once you're done, click on "Save changes" here.

[pause]

Next are your notification settings. Click on that in the sidebar.

"When do you want to be added as a watcher on a task?" I think it's a good idea to keep these two on: "When I create a task or subtask" and "When a new subtask is created in a parent task I am watching."

But we've only scratched the surface of these settings. Scroll down a bit, and you'll see that ClickUp gives you a *lot* of granularity.

I honestly just turn everything except the in-app notifications off. You can see that ClickUp's bugging me to enable desktop notifications at the top here, but I'm ignoring it.

The reason? Unlike Slack, there's not as much urgency when it comes to tasks, and I don't need to know on the spot when someone updates, like, a due date. Besides, I check ClickUp multiple times a day, and ClickUp has a built-in page for notifications, so I catch up whenever I have time.

Again, I think it's a good idea to keep the web (or in-app) notifications enabled. But at the very least, you should probably cut back on your email notifications, because the amount of emails you can get from ClickUp borders on spam, in my opinion.

Fortunately, ClickUp lets you enable or disable notifications in bulk. To do that, hover over the row or column you'd like to change, and click on the double check marks that appear. You can see that that enables or disables notifications for the entire row or column at the same time.

Unfortunately, you have to keep scrolling down and repeat this process for each section of your notifications. You can see that I've only changed "comment" notifications, but there are also notifications for tasks, due dates, and so on, and you'll have to click on each column in each section if you really want to disable everything.

So, pause the video here and take some time to work through your notification settings.

[pause]

With that, we are done with the settings, and we can finally get to the fun stuff. Or, at the very least, the not-as-boring stuff. Click on “Back” in the upper-left to get back to the AS Workspace.

Okay I lied: There’s actually one more setting that I’d recommend you change. Click on your profile icon in the lower-left and go to “Layout size & style.”

You can see that ClickUp gives you three whole interfaces to choose from. I don’t know why they can’t just decide on *one*, but at least you have options.

Personally, I prefer the “Modern” interface at a compact size, because, to my subjective tastes, it’s the cleanest option and it maintains good information density.

Pause the video here and experiment a bit to find out which interface you prefer.

[pause]

Working with tasks

Alright, we’re done with the settings, for real this time. So let’s get into the meat of ClickUp: tasks.

Hierarchy

Tasks are sorted into Lists, which group tasks based on some common feature. Pardall Carnival, for example.

Lists are further sorted into Folders, which we use to delineate different departments. You probably only have access to your department’s Folder and the General Folder at the moment, but if you’d like to work for more than one department, just message that chair and they can add you.

Editing tasks

Click on a Folder or a List in the sidebar to access it. Summer prep in Admin, for example.

In a List, you’ll see a... *list* of tasks. Once you finish a task, just click on the check mark next to it to mark it as done. And if a task has subtasks, you can click on this arrow to the left of the check mark to view them all.

On the right side, you'll see columns for assignee, due date, and priority. Click on each of them to edit. You can sort columns in ascending or descending order by clicking on the headings. You can even *add* columns—if you want to keep track of more data—by clicking on the plus icon on the upper-right corner of the list, and you'll see options for dropdown, text, number—a whole bunch of things.

If you want to adjust the settings for multiple tasks at the same time, hover over it and click on the circle that appears on the left to select the task. Select as many tasks as you'd like, and then make your changes using the bar that appears at the top.

If you want to view a task in detail, just click on it and a window should pop up. Here, you can

- change the name,
- add a description,
- add subtasks (or even go deeper *into* those subtasks to edit *those*),
- add attachments from your computer or Google Drive,
- add a comment,
- mark the task as done at the top,
- change assignees,
- set the priority,
- copy the link to this task,
- change the due date,
- set whether you're a watcher on a task (that is, whether you'll receive notifications for edits anyone makes on the task)
- and so on.

If you go just slightly below that and slightly above the task name—to this barely visible circle—you can add a dependency. For example, you can tell ClickUp which tasks need to be done *before* you can get started on this one. Like, maybe we need to... I dunno, get coupons from the UCSB Campus Store before I can find out the status of my liaison organizations. If you set the coupon task as something you're "waiting on," it'll appear in this box, as a small banner in this task window, and as this yellow sign in the List view.

Conversely, if this liaison task is stopping *other* tasks from being started, you can add *those* tasks to the "blocking" section. For example, if I need to find out about my liaison organizations before we can get coupons, I can set that here, and it'll again appear in this box, as a small banner, and as this red sign.

Finally, there's this section to add tasks that don't block each other, but are just related.

One more thing: You can click on this arrow icon to the left of the "close" button to minimize the task. That'll add the task to your "task tray" in the lower-right corner of the ClickUp window, which lets you quickly access it later. To remove a task from your tray, just hover over it and click on the "x" icon that appears.

There's a lot more here in this window that you can mess around with. Pause the video here and experiment to really get a feel for ClickUp.

[pause]

Creating tasks

I've talked a lot about editing tasks, but it's useful to know how to *create* them as well. You can create tasks directly in a list by going to the bottom and clicking on "New task." Now, you can give your task a name and adjust the settings on the right.

But you don't have to just use your mouse. If you hit the forward slash key on your keyboard, you can set things like assignees and due dates without clicking on anything. **[Demonstrate setting task due on Wednesday, assigned to Abraham.]** And when I'm done, I can just hit enter and the task will appear on the list.

Another way to create a task is to click on this "plus Task" button in the lower-right corner. For even greater efficiency, just press "t" on your keyboard. And here, you can add a name, set the List you want the task to go in, and basically do everything else you usually do with a task.

[pause]

Task views

So far, I've been doing everything in the default List view. But what if you want to see things in a more date-oriented way, or you're more of a visual or spreadsheet person?

Well, ClickUp offers a lot—and a do mean *a lot*—of different ways to view your tasks. To change your view, just go to the tabs at the top here and click on whichever view you'd like to, well, view.

Calendar, for example, positions every task in your current List based on their due date. You can drag tasks around to *change* their due dates, create tasks directly *on* the calendar... it's basically as fully featured as the default List view.

And this is just one! There's Table view, which brings spreadsheets into ClickUp, Board view, which displays your tasks as cards that you can drag between columns, and... everything else. You can add more views by clicking on "plus View."

Honestly, it's a lot. So pause the video here and just... play around with all the views in ClickUp and decide which one's your favorite.

[pause]

Search and filters

Navigating between tasks with just your mouse can get a bit tedious. That's why I want to bring your attention to the search function.

You can pull up the search menu by pressing Ctrl+K on Windows or Cmd+K on Mac. You might, at this point, be getting a sense of *déjà vu*, because that's the exact shortcut you can use on Slack to pull up the pretty similar jump menu. And just like Slack, ClickUp's version of the menu lets you jump between different tasks just by typing. "Ferris wheel," for example.

You can see that ClickUp's search menu offers a few ways for you to filter your tasks, but they're pretty limited. If you want *more* filters, you'll want to go to the whole IVCRC space. To do that, click on IVCRC in the sidebar. Make sure that you click on the word itself, because if you just click on the space around it—to the right, for example—that'll just collapse the whole section in the sidebar.

Once you're here, click on the funnel icon here to bring up the filters menu. Here, you can choose from a wide selection of criteria to filter all of IVCRC's tasks. For example, if you want to see all of *my* tasks, click on "Assignee," "Is," and then myself.

You can also stack filters so that you get even more granular with your searches. For example, if you want to see my *highest*-priority tasks, click on "Add filter," "Priority," "Is," and "Urgent." And there you go. Once you're done, click on "Clear all" to go back to the default unfiltered view.

If you have a specific combination of filters that you keep coming back to—for example, if you like this combination here—you can save your combination as a template. Click on "Templates," and you can save your combination as a private

filter—which makes it usable only by you—or as a Workspace filter—which makes it available to everyone in IVCRC. You can see that we’ve already set up a couple of Workspace templates ourselves.

You can also filter by text using the search box to the right of the filter icon. “ClickUp,” for example. You can also set where you want ClickUp to search *in*, by clicking on the down arrow next to the search box.

[pause]

Weekly tasks

What

At this point, you might be feeling a bit overwhelmed at the number of tasks that we have, especially since so many of them seem to be due on the same day.

Well, I’m here to tell you that, fortunately for you, we do not expect you to finish 20 tasks per week. The due dates are more to help keep your tasks at the front of your mind, and to give you something to work on if you have time.

Instead, we only ask you to work on three-ish things every week: your primary, secondary, and quick tasks.

Your primary task is marked by the “Urgent” priority, or a red flag. This is the one thing you should definitely work on for the week, and we expect you to have an update for how you’re doing with this task at the next general meeting. You should also, preferably, finish this task within the week.

Your secondary task is marked by the “High” priority, or a yellow flag. You should work on your secondary task if you’re done with your primary task or something’s stopping you from working on it, like you’ve sent an email to someone and you’re waiting for their response. We’d also prefer if you finished this task within the week, but it’s not as high-priority as your primary task.

Lastly, your quick tasks are tagged with “quick” (complicated, I know) and marked by the “Normal” priority, or a blue flag. Quick tasks shouldn’t take much time or effort to finish. Think sending an email to someone or taking a photo of something. For this reason, we ask that you finish all of your quick tasks assigned to you for the week.

To recap, you should work on (and preferably finish) your primary, secondary, and quick tasks each week. If you're done early, you can work on other tasks assigned to you, or even something that's not assigned and that you'd just like to do.

[pause]

Viewing your weekly tasks

"Okay, so my weekly tasks make sense and sound reasonable," I (don't) hear you saying. "But how do I view them all in one convenient place?" I (don't) hear you asking.

Excellent non-question!

To view them, go back to the filters I mentioned earlier, click on "Templates," and choose "Your weekly tasks" in the Workspace filters section. Then, go to the Subtasks dropdown in the upper-right corner and choose "show subtasks as separate tasks."

And there you go! A full list of your primary, secondary, and quick tasks for the week. Your department chair will also DM you the same info every week on Slack, which is a great time to ask questions about any of your responsibilities.

[pause]

More features

So those are tasks. Here are some more features that you might find helpful.

- Firstly, you can favorite most pages on ClickUp. Pages that you favorite will appear on the top of the screen, kinda like bookmarks in your browser. To favorite a page, hover over an item in your sidebar, click on the three-dot icon that appears, and click on "Favorite" or "Unfavorite."
- Next, ClickUp has a dedicated page for notifications, which I prefer over email or push notifications.
 - To view your notifications, click on the bell icon in your sidebar, or just press "n" on your keyboard. If you're a watcher on a task, any changes that anyone makes to said task you'll receive on this page, which is great for keeping up with what everyone is doing without having to send a message.

- To clear your notifications, just click the check marks, or click on “clear all” in the upper-right corner, and you’ll get a burst of confetti and an inspirational quote in celebration.
- Lastly, if you want to display a bunch of information on the same page, ClickUp has a feature called dashboards that lets you do just that.
 - To access your dashboards, just go to the sidebar, or press “d” on your keyboard. Click on this plus icon in the sidebar to create a new dashboard.
 - You should already have access to *one* dashboard called “IVCRC productivity,” and here you can see a bunch of stuff that demonstrates how this feature works.
 - You can have text, graphs, charts—and even more, if you click on “Add widget” in the upper-right corner. You can see there’s quite a bit here—you can even embed from a different service.

Closing thoughts

Okay, that’s pretty much all I’m gonna say about ClickUp. Thank you for bearing with another longer-than-10-minute video. The rest of this series *will* go back to sub-10 (or, at the very least, much closer to that).

So what’s next? Well, once you finish this video, there should already be a List of tasks on ClickUp with your name on it—literally! We’ve created a List of onboarding tasks for you specifically that you can take a look at and check off if you’re done with them. Beyond that, you can take a gander at all of the tasks that’ve been assigned to you using the method I described previously.

Right, that’ll do for now. I hope that ClickUp really does make your life easier, and that you’ll find it a benefit rather than a hindrance. Our next video will cover the different virtual and in-person meetings that IVCRC holds.

Until then, thank you, as always, for your attention, and have a nice day. Bye-bye.