



How to become a task organization ninja with Dashboard



Hero of the day: Dashboard

Customize content on your dashboard

Access the tasks straight from the widgets

Click to maximize widget

Delete widget

Drag and drop to relocate widget

Track updates in real time

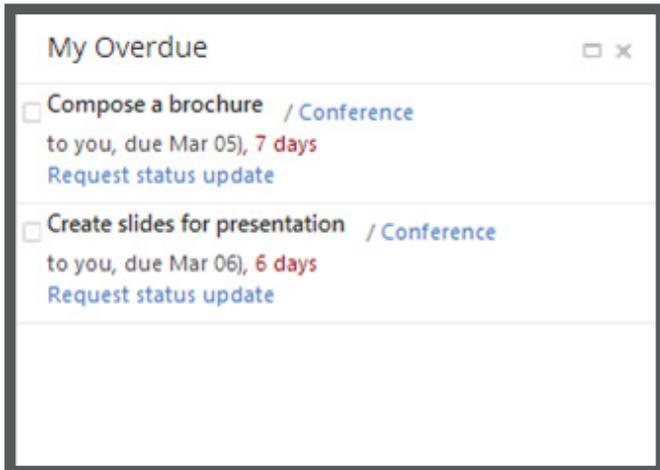
The screenshot shows a dashboard with several widgets: 'My Overdue' (tasks like 'Compose a brochure', 'Create slides for presentation'), 'Due today/This Week' (tasks like 'Contact organizers', 'Print handouts'), 'Overdue by you' (tasks like 'Design invitation emails', 'Prepare speaker profiles'), and 'Backlogged' (task 'PR conference'). An 'Activity Stream' on the right shows real-time updates from team members like 'Mary'.

Dashboard allows you to:

- ✔ Work on tasks
- ✔ Keep the most important tasks at hands
- ✔ Manage work
- ✔ Communicate with your team
- ✔ Control work progress



Default widgets are useful and applicable for everyone

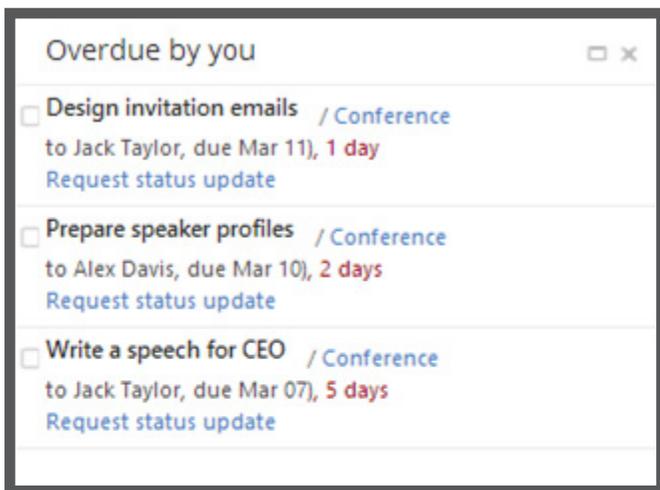


My overdue

Shows a list of overdue tasks that are your responsibility and should be kept empty.

Useful tips to keep it empty:

- If a task is urgent, open the task, set the highest priority, and contribute immediately;
- If a task is not urgent backlog it or change the deadline.

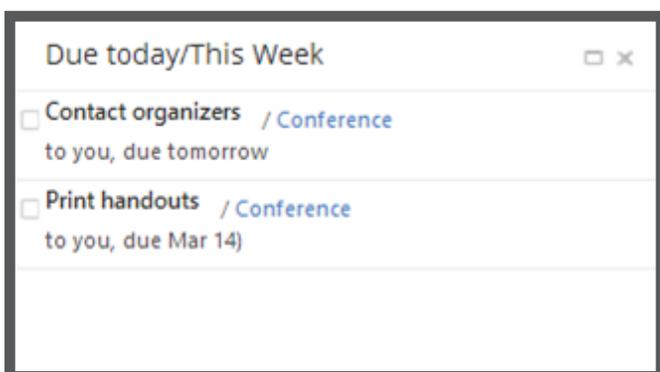


Overdue by you

Contains overdue tasks created by you and assigned to somebody else. It also should be kept empty.

Useful tips to keep it empty:

- Request a status update to learn about the progress;
- Add more assignees to the task if help is needed.

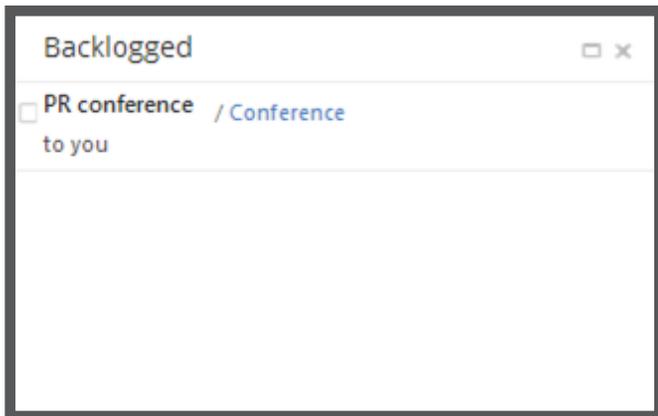


Due today/This Week

It's a personal to-do list with tasks which have deadlines during this week.

Useful tips:

- If you track time, then you can start a timer in each task and then switch between timers straight from the dashboard's upper toolbar.

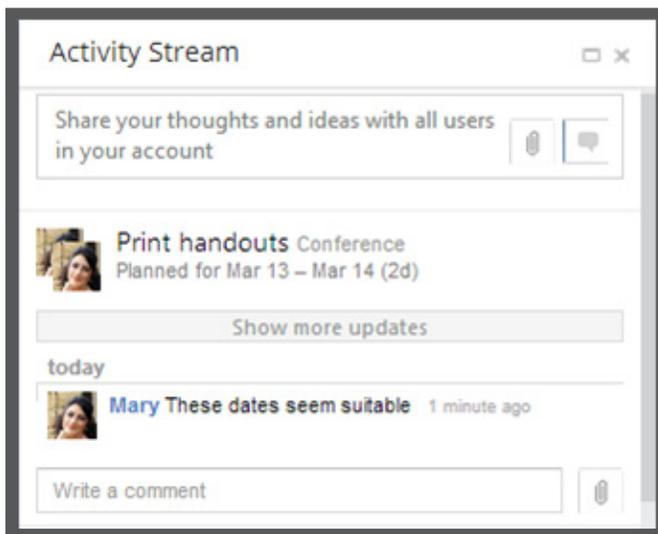


Backlogged

It serves as a bank of tasks which do not have due dates.

Useful tips:

- It could be used for keeping ideas and notes;
- Often it's better to open it in the task-list view due to the volume of backlogged tasks.

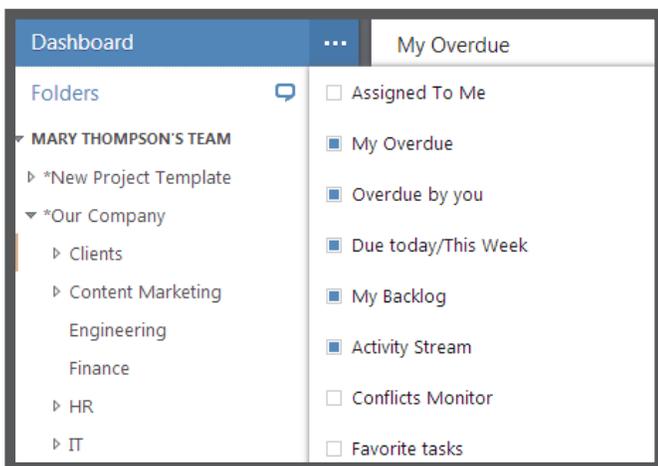


Activity Stream

It helps you to stay on the same page with your team, learning about all changes and task updates.

Useful tips:

- If you need to narrow down the stream to your specific needs, you can open the Activity Stream right from the Dashboard and adjust your filters temporarily.



Other default widgets

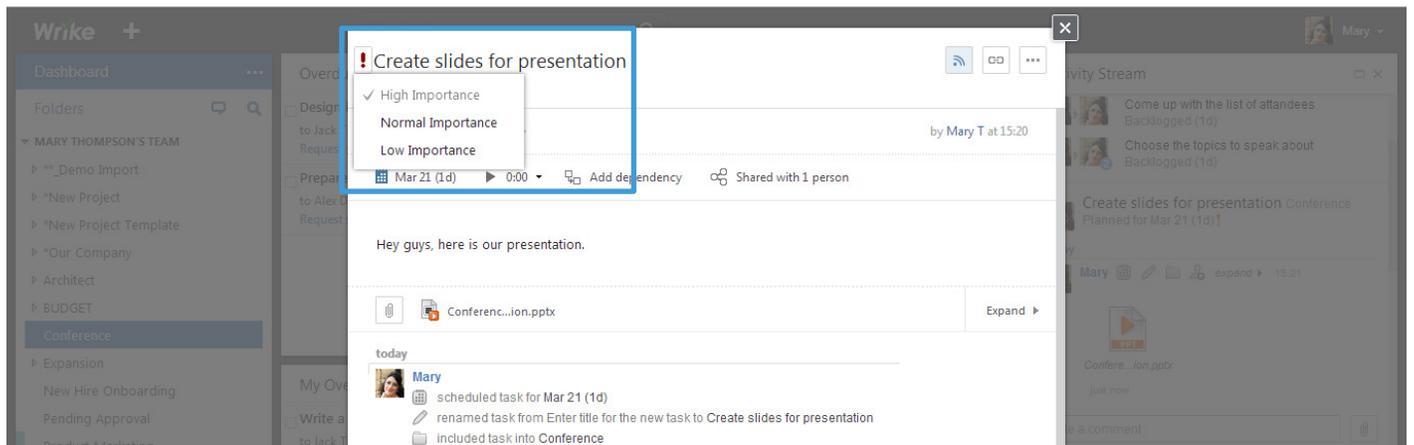
Add more default widgets from the Dashboard menu:

- Assigned To Me, which shows all active tasks assigned to you;
- Conflicts Monitor, which notifies you about tasks having conflicting dependencies;
- Favorite tasks widget.

Custom widgets suit your exclusive needs

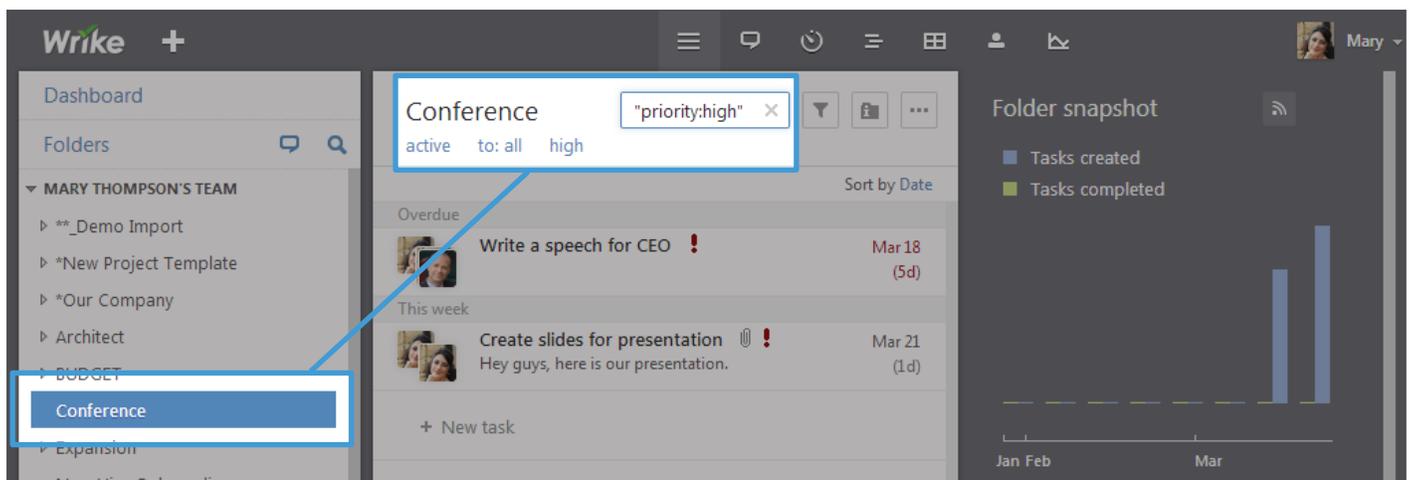
Importance-based widget

Challenge: Stay in the loop of how the progress is going in the most important tasks.



Step 1:

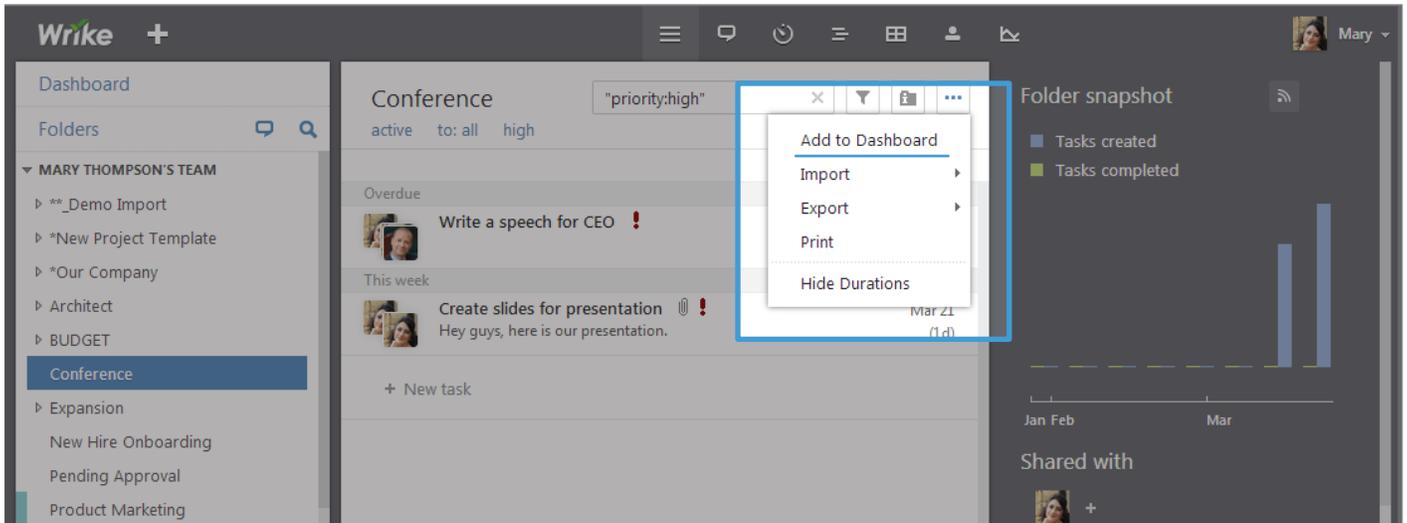
Choose the most important tasks by clicking on the exclamation mark.



Step 2:

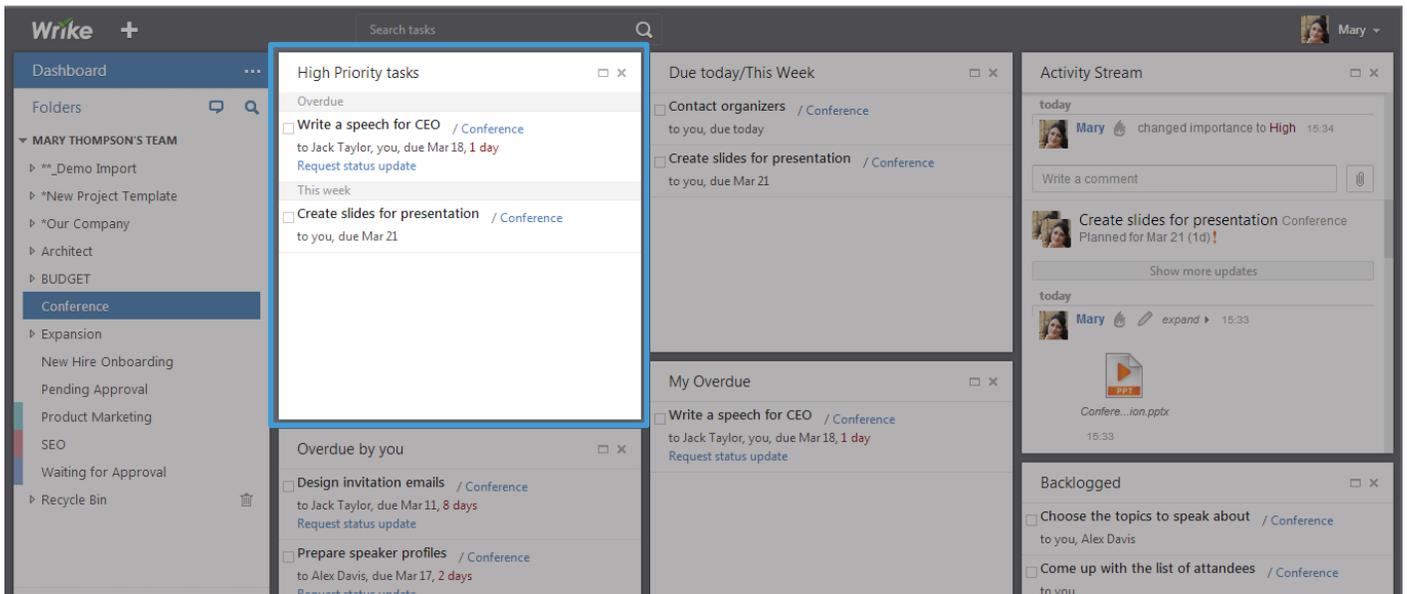
Open the necessary folder and apply the operator "priority:high".

Importance-based widget



Step 3:

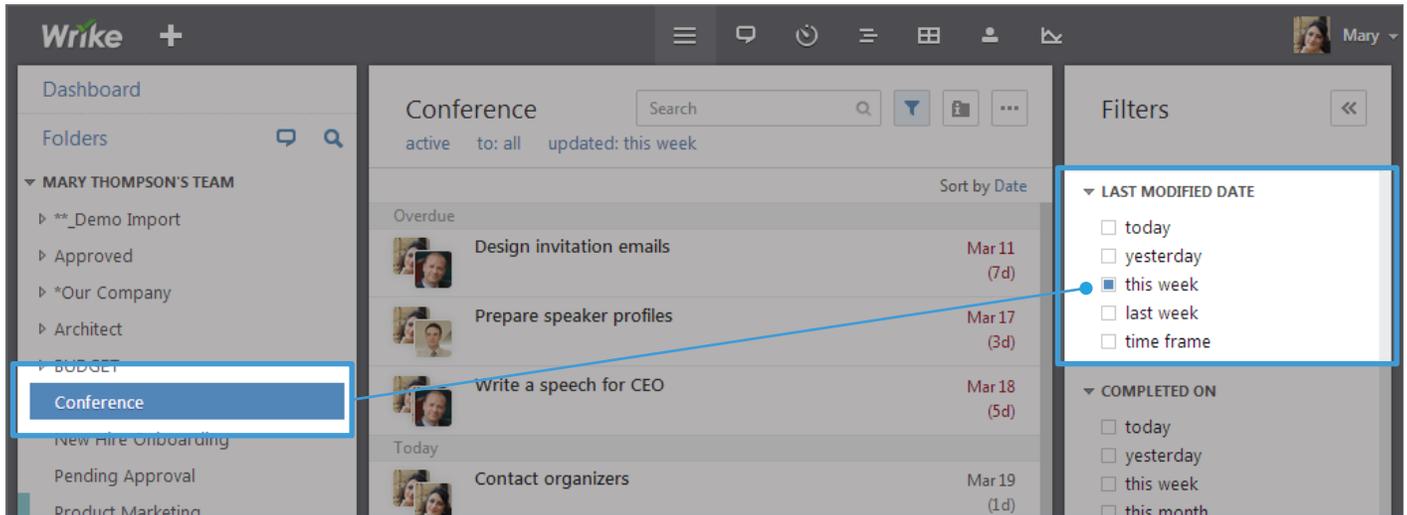
Add this widget to the Dashboard.



Now you can use this widget.

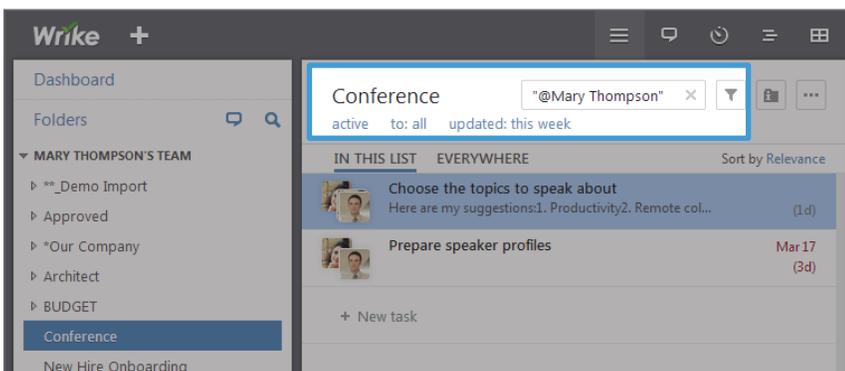
Collaboration-based widget

Challenge: Track all the tasks with comments where I was @mentioned.



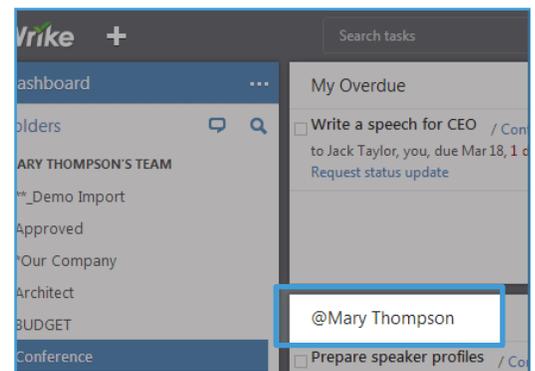
Step 1:

Go to the necessary folder and add a “last modified date” filter to show only recently modified tasks.



Step 2:

Apply “@User Name” to filter tasks with comments mentioning you.

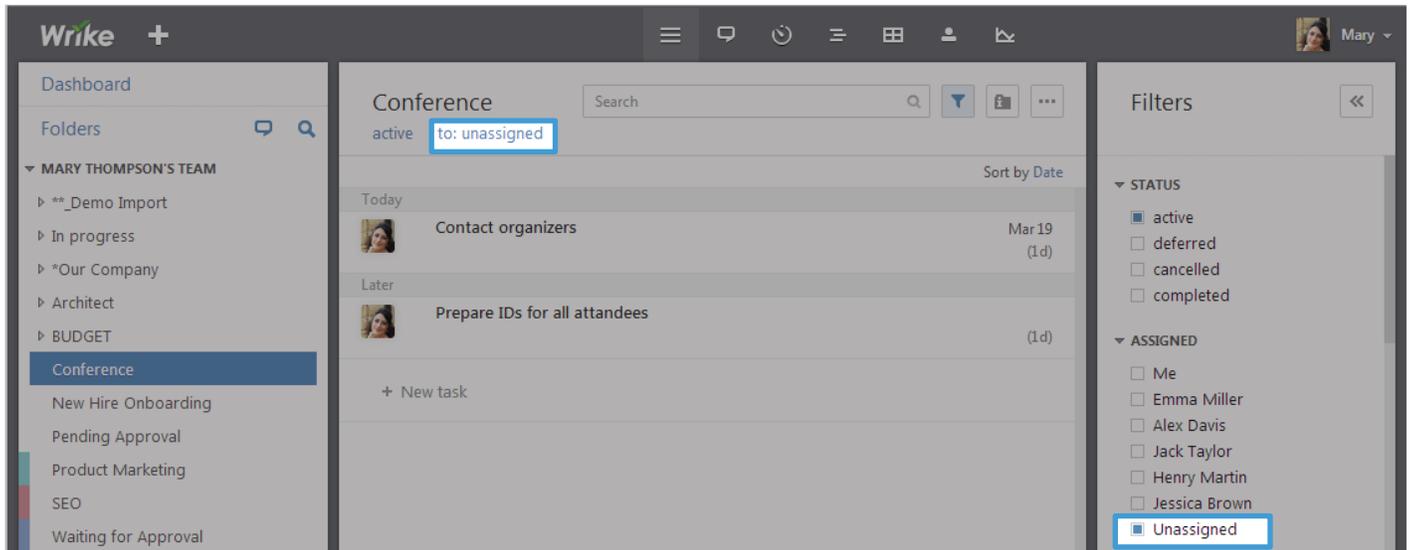


Step 3:

Add this widget to the Dashboard.

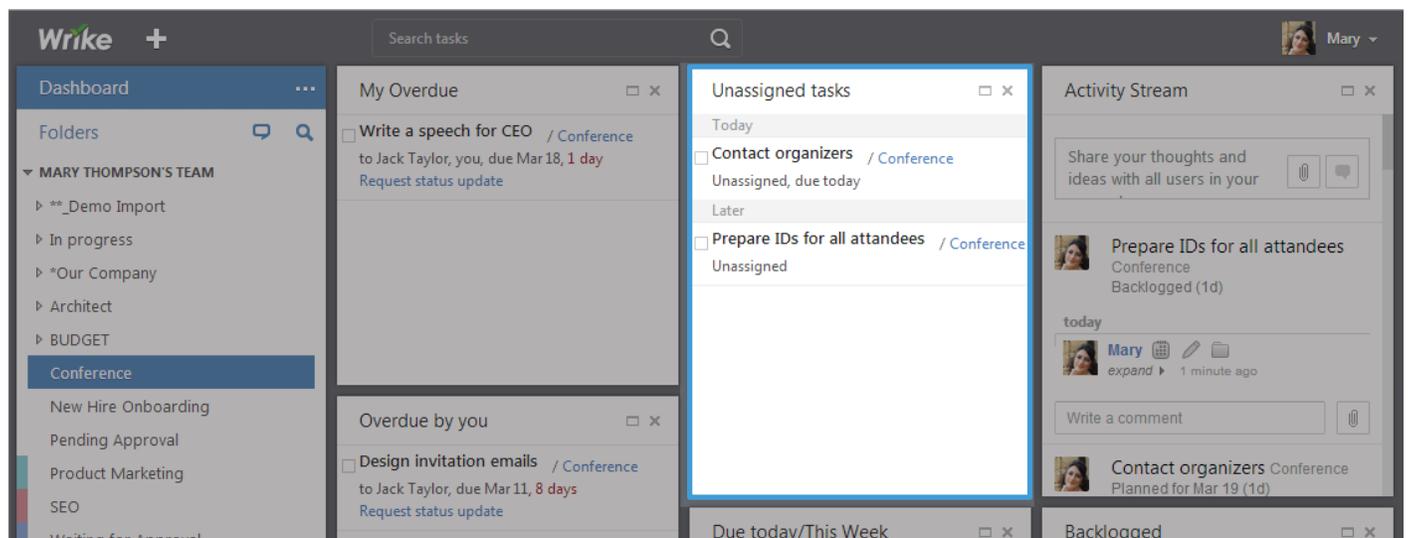
Unassigned-tasks widget

Challenge: Have all unassigned tasks at hand to plan the workload precisely.



Step 1:

Go to the necessary folder and select the “unassigned” filter.

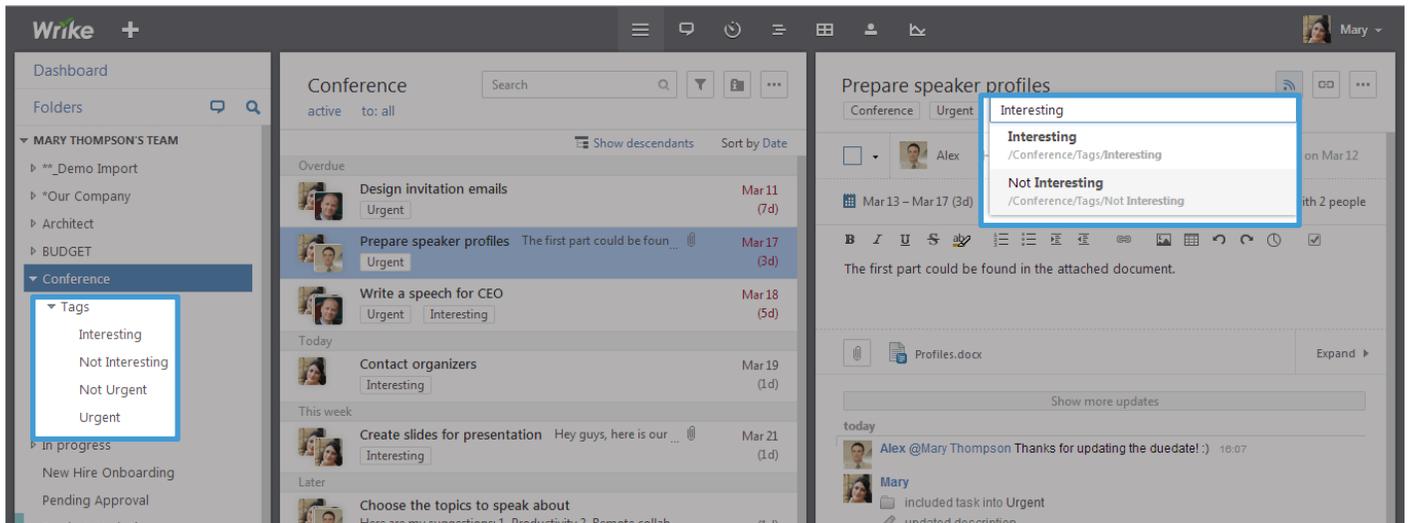


Step 2:

Add this widget to the Dashboard. Optionally, you can add the filter “author: me” to see the tasks created only by you.

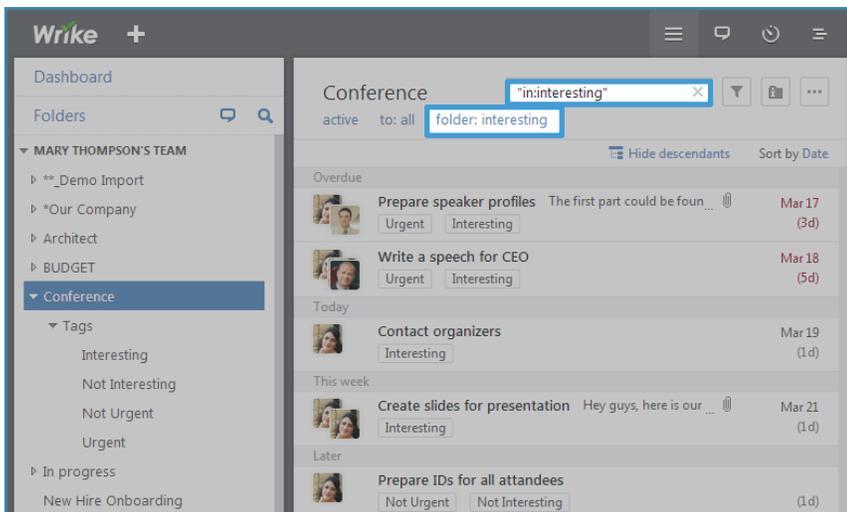
Personal value widget

Challenge: I need to attribute intrinsic value to my tasks and categorize them according to this value.



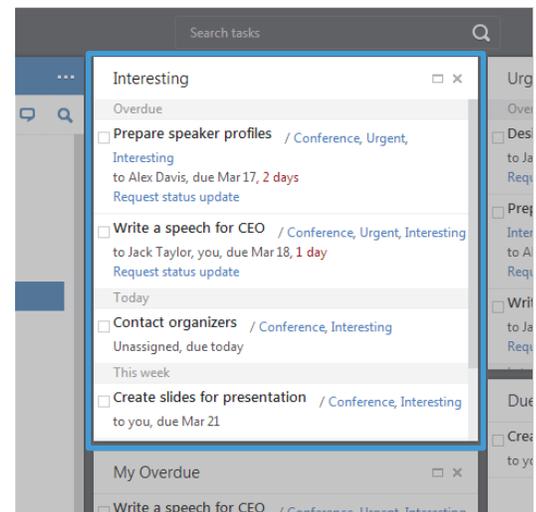
Step 1:

Create personal tags (folders) and tag certain tasks.



Step 2:

Apply the filter "in: folder name".

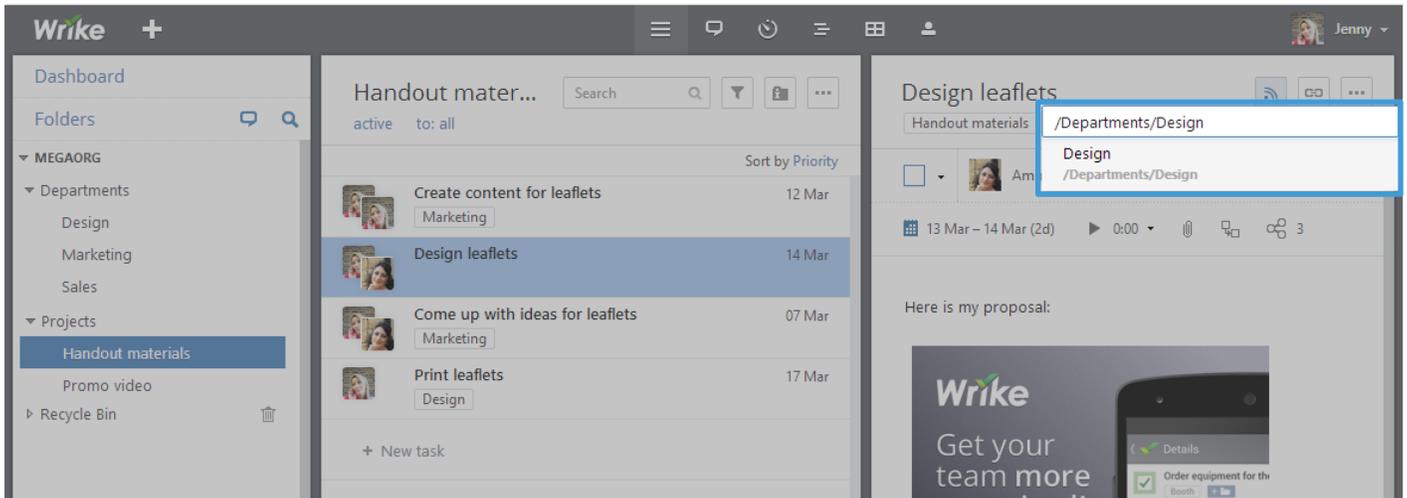


Step 3:

Add this widget to the Dashboard.

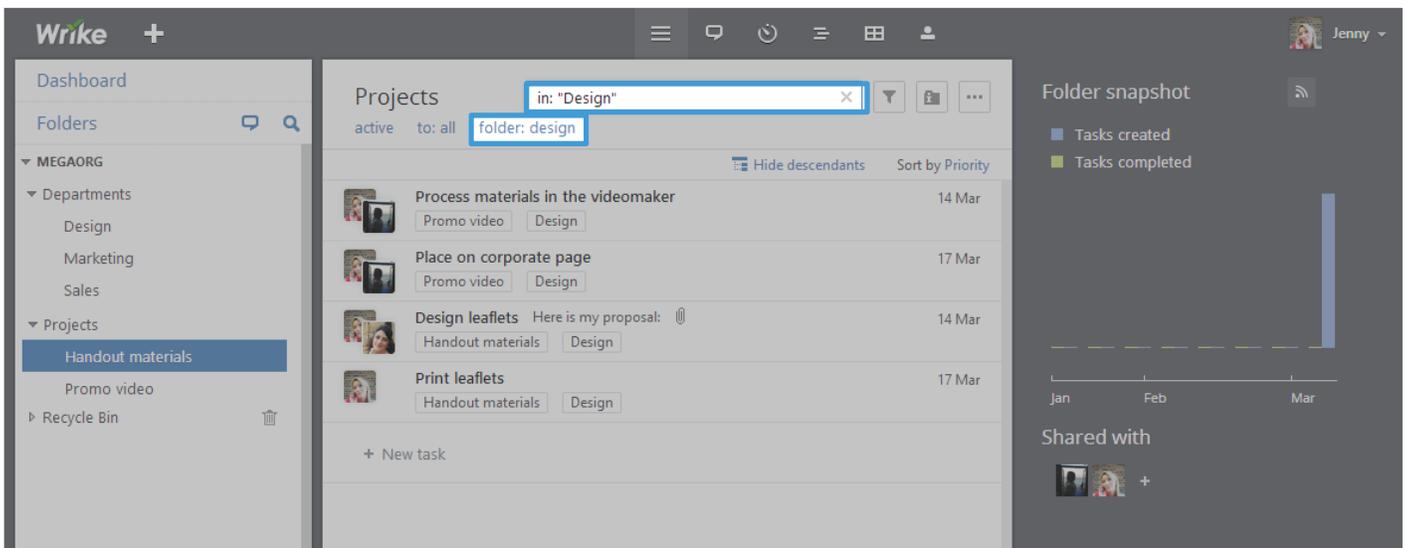
Widget for cross-department projects

Challenge: Group tasks that my department has been working on by project.



Step 1:

Tag the tasks from one project with department tag.



Step 2:

Go to the parent folder and apply command in: "Department name".

The screenshot shows the Wrike dashboard interface. On the left is a sidebar with 'Folders' and 'MEGAORG' containing 'Departments' (Design, Marketing, Sales) and 'Projects' (Handout materials, Promo video). The main area features several widgets: 'Tasks in Design (All projects)' (highlighted with a blue border), 'Overdue tasks (All projects)', 'Backlogged (All projects)', and 'Activity stream'. The 'Tasks in Design' widget lists:

- Process materials in the videomaker / Promo video, Design to Beata Johansen, due 14 Mar
- Place on corporate page / Promo video, Design to Beata Johansen, due 17 Mar
- Design leaflets / Handout materials, Design to Amber Jones, due 14 Mar
- Print leaflets / Handout materials, Design Unassigned, due 17 Mar

Step 3:

Add this widget to your Dashboard.

The screenshot shows the Wrike Gantt chart view. The top bar indicates 'Projects' with filters for 'active', 'to: all', and 'folder: design'. The chart displays a timeline from 03 Mar 2014 to 24 Mar 2014. Key tasks and their durations are:

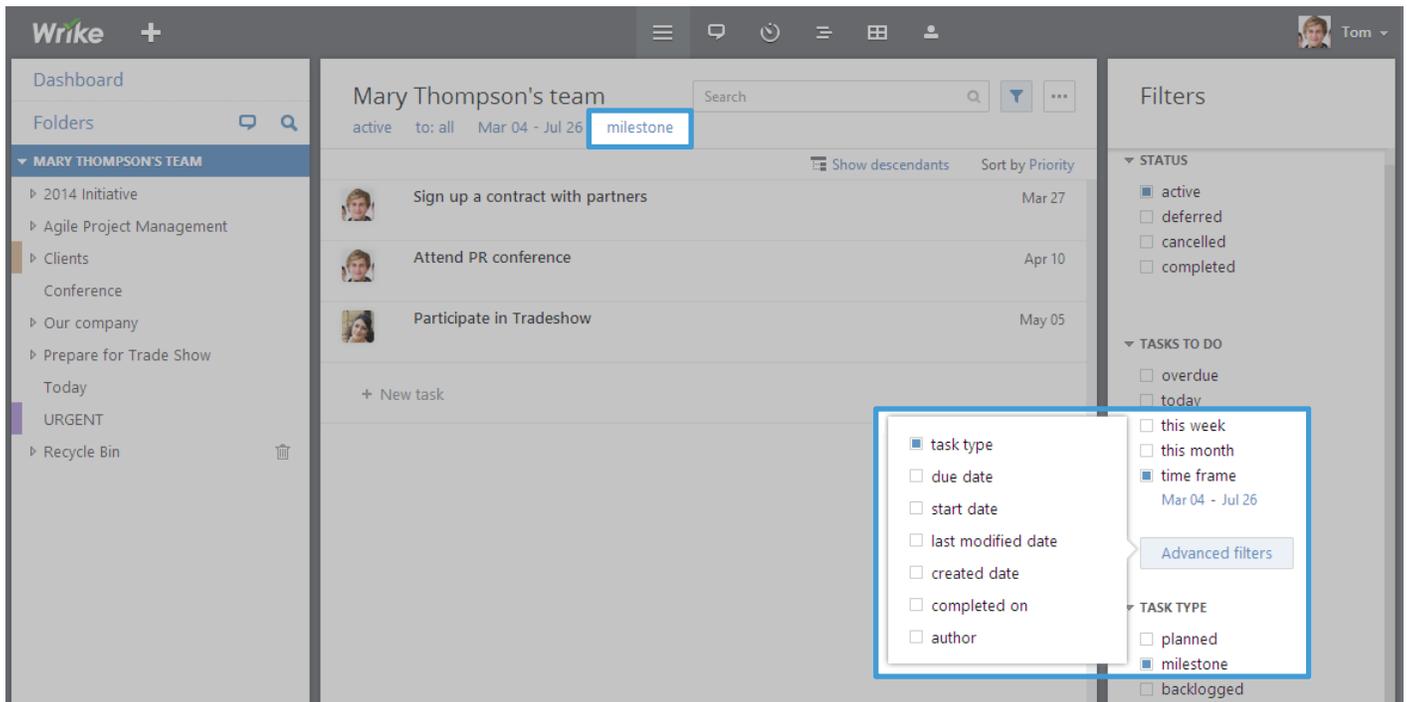
- Projects**: spans from 03 Mar to 17 Mar.
- Promo video**: spans from 03 Mar to 17 Mar.
- Handout materials**: spans from 03 Mar to 17 Mar.
- Process materials in the videomaker**: assigned to Beata Johansen, spans from approximately 08 Mar to 14 Mar.
- Design leaflets / Amber Jones**: spans from approximately 10 Mar to 14 Mar.
- Print leaflets**: spans from approximately 16 Mar to 17 Mar.

Step 4:

You can always open this widget in the Gantt chart.

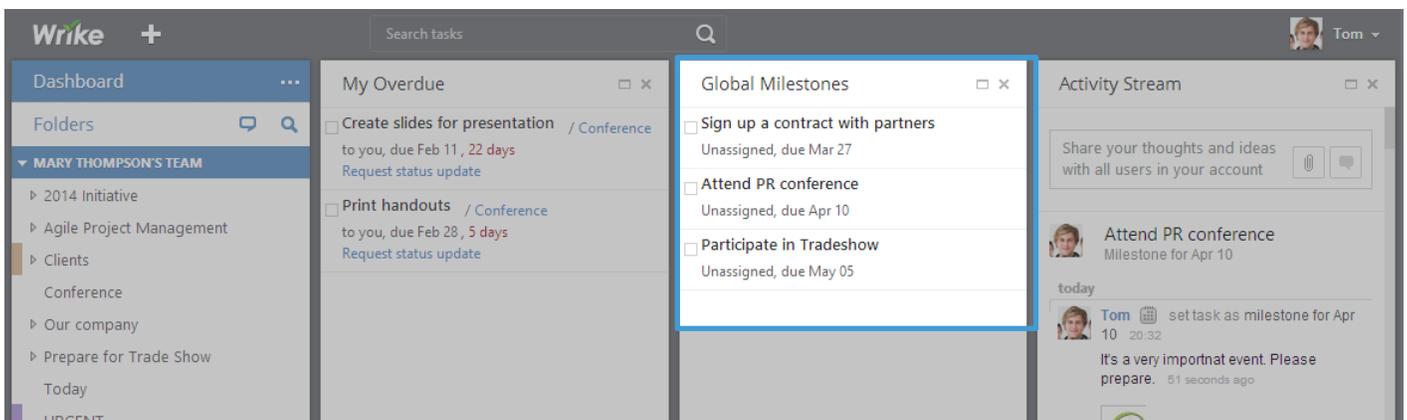
Milestones widget

Challenge: Have all milestones at hand to get full control over the work progress.



Step 1:

Choose a folder and apply advanced filter "task type: milestone".



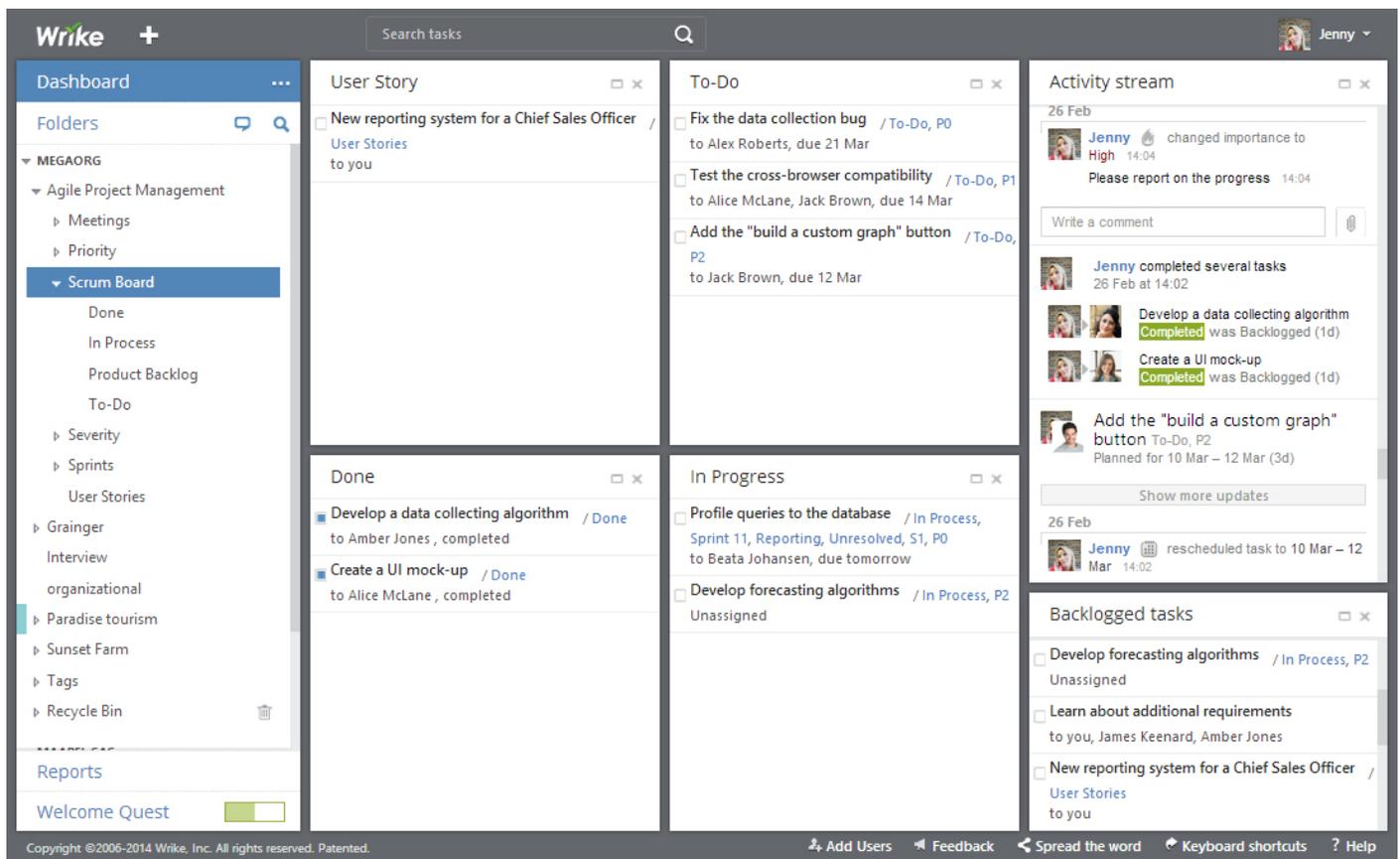
Step 2:

Add this widget to your Dashboard.

Methodology-based widgets

Challenge: Adjust Wrike's Dashboard to my project management methodology.

Practice Scrum...



Methodology-based widgets

Challenge: Adjust Wrike's Dashboard to my project management methodology.

...Kanban or else!

The screenshot displays the Wrike dashboard interface. On the left, a sidebar contains a 'Folders' section with a tree view: 'MEGAORG' > 'Agile Project Management' > 'Kanban board' (selected) > 'Doing', 'Done', and 'To-Do'. Below this is a 'Reports' section with a 'Welcome Quest' progress bar. The main workspace is a Kanban board with three columns: 'To-Do', 'Doing', and 'Done'. The 'To-Do' column contains three tasks: 'Adjust default widgets / To-Do to you, due 03 Apr', 'Ask colleagues to report on progress / To-Do to Alex Roberts, due 10 Apr', and 'Attend a webinar about Dashboard / To-Do Unassigned, due 11 Apr'. The 'Doing' column contains two tasks: 'Adjust Dashboard to Kanban / Doing to Alex Roberts, due 12 Mar' and 'Add 3 widgets: To-Do, Doing, Done / Doing to you, due 14 Mar'. The 'Done' column contains one task: 'Learn about Kanban / Done to you, Amber Jones, due 03 Mar, 2 days, completed' with a 'Request status update' link. The top navigation bar includes the Wrike logo, a search bar, and the user profile 'Jenny'. The footer contains copyright information and utility links: 'Add Users', 'Feedback', 'Spread the word', 'Keyboard shortcuts', and 'Help'.

Action plan:

1. Go to Wrike and take a critical look at the widgets on your Dashboard.
2. Define what kind of task clusters you need to keep on hand.
3. Replace the widgets that you don't need with those that'll bring you maximum value.
4. Beware of the overdue tasks in your widgets: Mark them complete or reschedule them.
5. Ask for help at support@team.wrike.com if you still don't know how to create a necessary widget.

Further readings:

1. [Wrike's blog post](#) about Dashboard
2. Blog post about searching from [Dashboard](#)
3. All about [Dashboard in Wrike's help section](#)
4. [List of search operators](#) for creating custom widgets
5. [Article in help section](#) about task filters