

# Step 6: Monitoring Work and Building Up Success

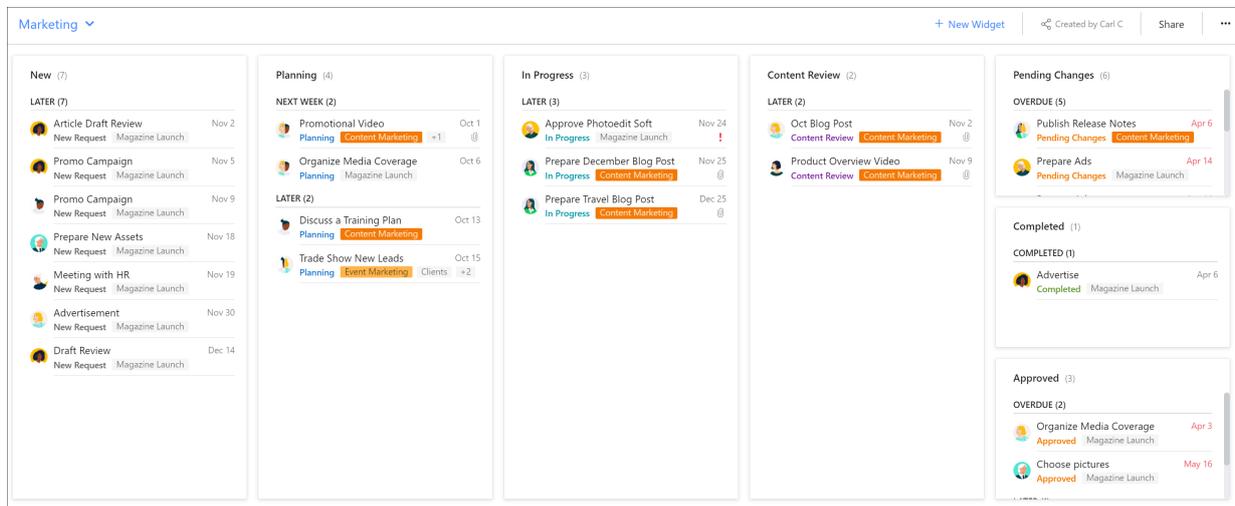
## Overview

Now that you've learned the basics of how to Start Working and Collaborating, let's find out how you can use Dashboards and Reports to stay on top of your and your team's progress. All paid accounts can use Dashboards, whereas Reports are only available to Business and Enterprise accounts.

<https://fast.wistia.com/embed/iframe/csvcvyqga8?modestbranding=1&autohide=1&showinfo=0&controls=0>

## Dashboards

Dashboards are a great way to gather the information you need to keep on top of a certain project or goal in one place, and easily check how things are going. You can use prebuilt widgets, or create your own custom ones, and then add them to a dashboard so you can see exactly what you need to.



Here are some examples of dashboards which can help you on your way to success:

- Understand your current project priorities using a **Project Dashboard** containing a **Project widget** and custom widgets relating to your projects' progress.
- Create a **Team Dashboard** allowing you to distribute work between your team members with drag and drop. Use a widget with unassigned tasks and a separate widget for tasks assigned to each team member.
- Use a **Manager Dashboard** so you can gain visibility into your team's work. It consists of widgets with tasks grouped by status (new, in progress, completed, and so on). You can check what your team members are working on or what they have planned without having to continually ask.
- Sometimes key actions are overlooked, schedule risks aren't addressed, and a project deadline is missed. With a **Risk Dashboard** displaying overdue tasks, conflicts, and unassigned work, you can make sure that nothing falls through the cracks.
- A **Personal Dashboard** helps your team members understand their priorities so they can focus on their most important tasks. While creating widgets for this dashboard, always use the **Current User** option, so when you share this dashboard, everyone will get a personal version of their dashboard.

Learn how to create a dashboard here.

## Reports

Wrike Reports are customizable reports which you can build to quickly gather the data you need from your tasks and projects. Each time you open or refresh your report, it automatically updates to include the most up-to-date data which meets your report's criteria.

Help team members, executives, or clients gain insight into projects by sharing reports with them.

Reports can be created from templates, give you automatic calculations or reminders, and be shared outside of Wrike by exporting or using snapshots.

Active Tasks by Assignee							Edit	Share	Subscribe	...
Group by: Assignee +		Last updated on Sep 22 at 16:06 ↻					Expand all	Collapse all	Leave feedback	...
🔍	Title	Status	Due date ↓	Project or folder	Workflow	Author				
1	Ben Backlog	2	MAX 06/17/2021							
2	Plan event	In Progress	06/17/2021	1. Planning	Default Workflow	Melanie Milestone				
3	Create catering plan	Approved	11/25/2020	2. Logistics	Default Workflow	Irene Integration				
4	Carl Calendars	2	MAX 10/01/2020							
5	Email templates redesign	Planning		3. Creative	Marketing	Melanie Milestone				
6	Promotional Video	Planning	10/01/2020	Content Marketing, Devel...	Marketing	Wrike Bot				
7	Designer	6	MAX 08/03/2021							
8	Print Design	In Review	08/03/2021	2. Creative	Default Workflow	Melanie Milestone				
9	[Siltechi] PoC Task 02 - High Level Design	New	07/22/2021	Siltechi	Default Workflow	Melanie Milestone				
10	Design the Registration flow	New	03/05/2021	New Website	Design	Melanie Milestone				
11	Print design	New	03/05/2021	3. Creative	Default Workflow	Melanie Milestone				
12	[Sumtechnology] Bid Task 03 - High Level Design	In Progress	10/05/2020	Sumtechnology	Default Workflow	Melanie Milestone				
13	Social Design	Approved	09/28/2020	Social Post	Default Workflow	Melanie Milestone				
14	Irene Integration	18	MAX 06/27/2021							
15	Print design	New	06/27/2021	3. Creative	Default Workflow	Melanie Milestone				
16	Design Invitations	In Progress	05/04/2021	1. Events, Invites	Default Workflow	Melanie Milestone				
17	Design the Invites	New	04/29/2021	Exec Event	Design	Melanie Milestone				
Total: 714 tasks			MAX 08/06/2021							

Here are some ideas for useful reports you can create quickly and easily from templates.

- A report on **Active Tasks by Assignee** can show you at a glance what's being worked on and by who.
- A **Weekly Project Status** report will help you keep on top of how your projects are progressing, and who is the right contact person for each.
- Reporting on **Overdue Tasks by Assignee** will allow you to stay on top of work and offer help where needed.
- Reports based on templates such as **Projects Overdue this Month** and **Time Spent this Week** let you keep a handle on time management throughout your team.
- A simple report on **Unassigned Tasks** will show you what's still unaccounted for, and make sure nothing is forgotten.

## Thank you!

Thank you for taking the time to read this guide on how to get started. Now it's time to head over to your workspace and start getting more things done with Wrike.