Best Practices for Monitoring Your Team's Work

3 Habits Your Team Needs to Build for efficient monitoring of work with Wrike:

1. Keeping statuses of tasks and projects up-to-date
2. Keeping start dates and due dates of tasks and projects up-to-date
3. Utilizing the existing folder structure and maintaining its logic

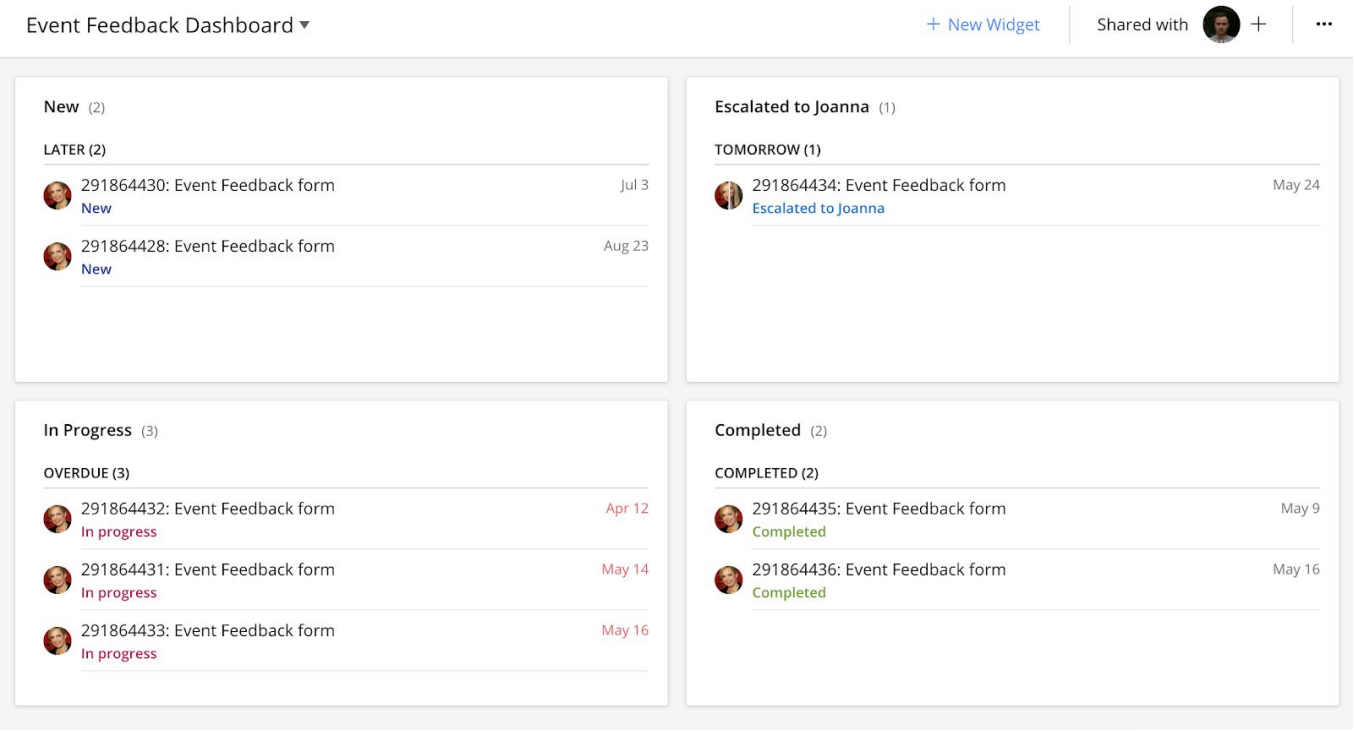
Dashboards

Dashboard to monitor intake process

 Set up a request form so that all incoming requests fall into a specific folder

 Create a custom workflow with statuses representing stages your incoming requests will go through

 Create a dashboard and add a widget for each intake process status

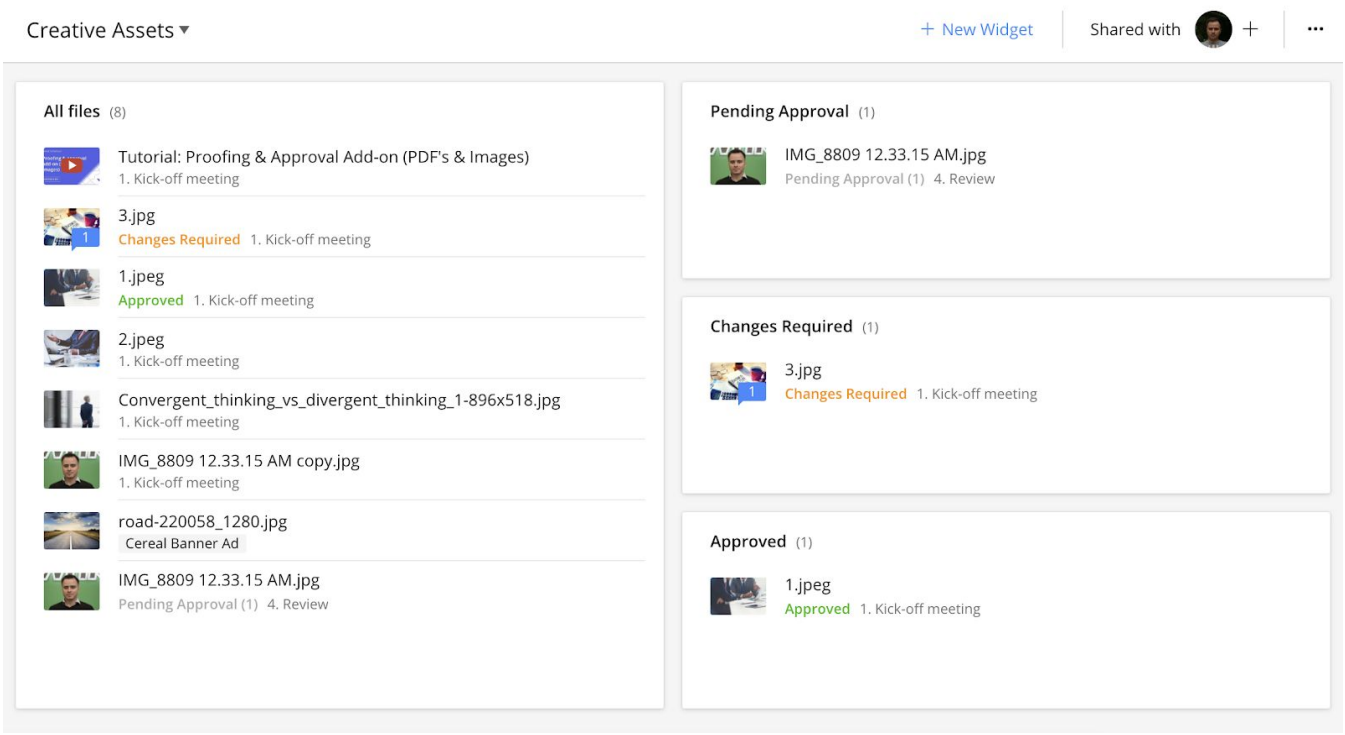


Dashboard to monitor creative assets

(only for Wrike for Marketers subscriptions or business/enterprise with Wrike Proof addon purchased)

 Create a new dashboard and add a file widget based on the space/folder where all your creative assets reside

 Add the widget “My pending Reviews”

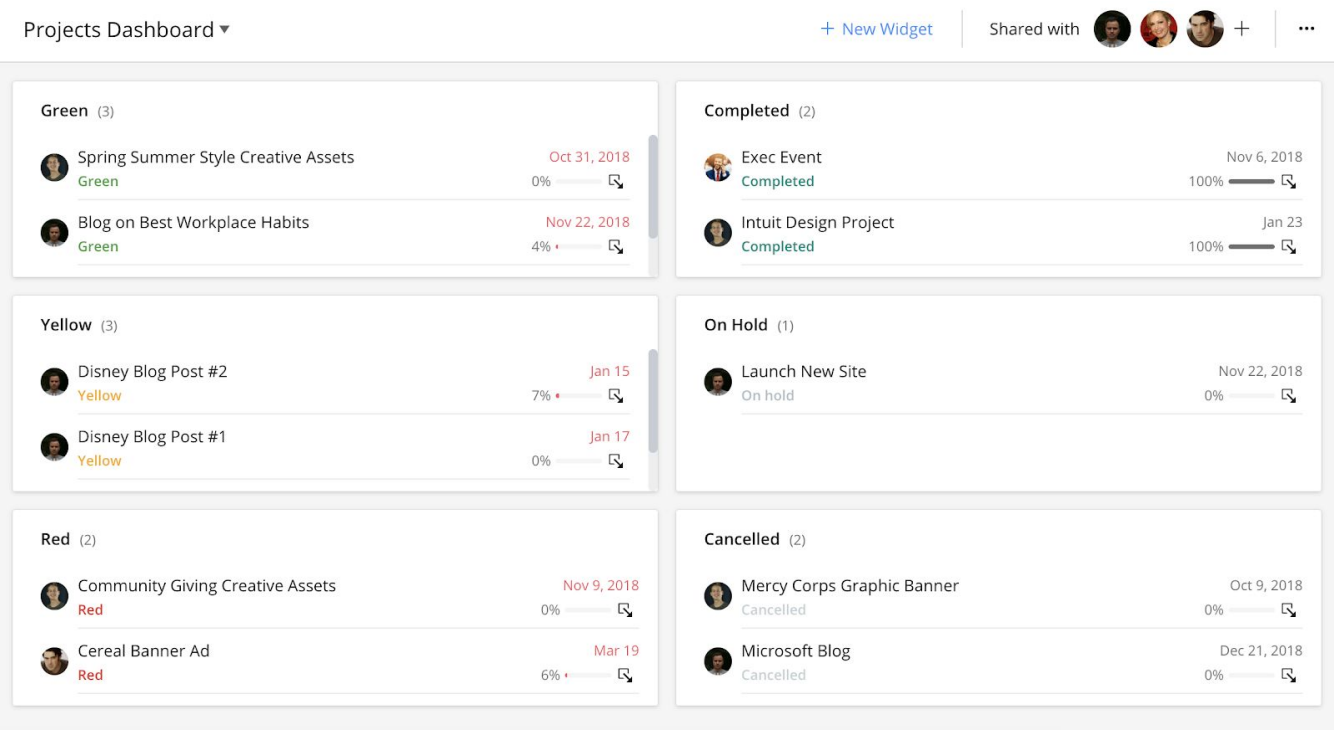


Project-based dashboard to monitor high-level information

 Go to wrike.com/labs and enable the Project Health feature. Go back to the workspace and refresh the browser tab.

 Create a dashboard and add a projects widget and enable a “green” status filter on the right-hand side panel

 Repeat the process to add project widgets for other project statuses

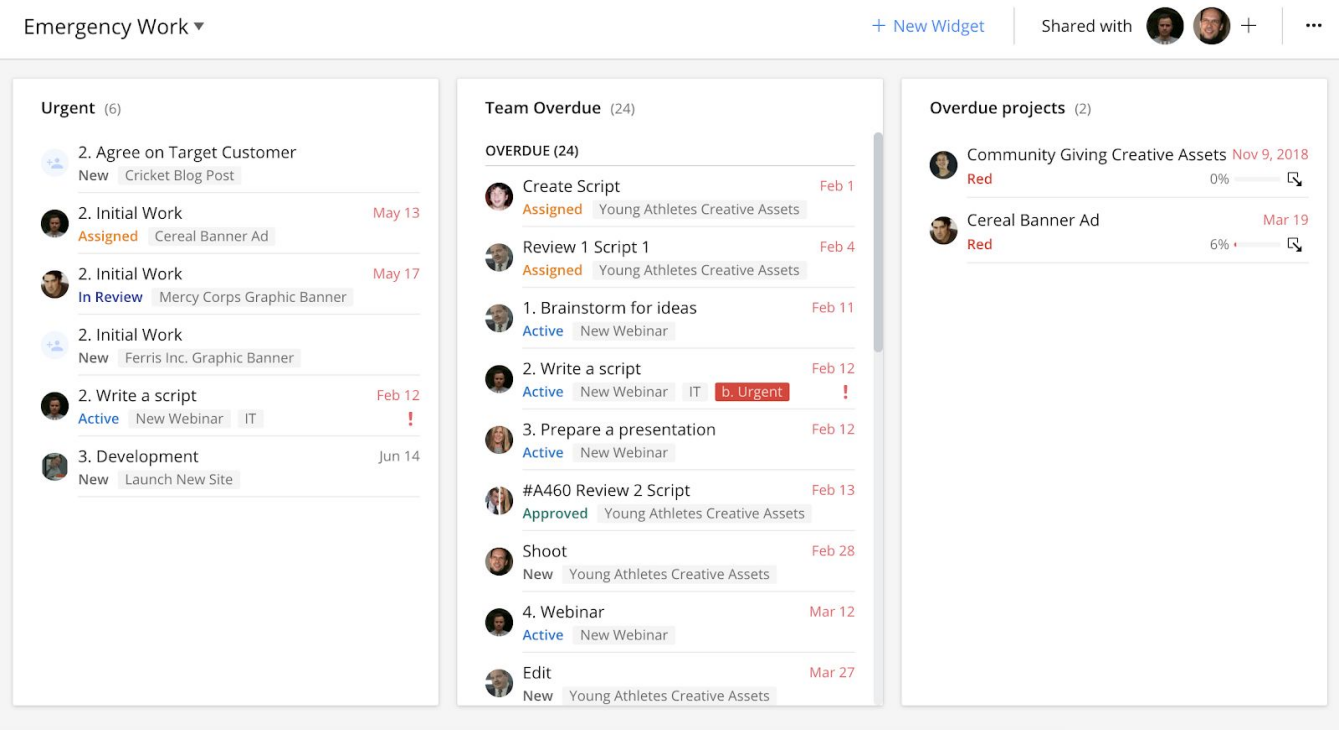


Dashboard to monitor emergency work

 Create a folder called “urgent” in your team’s space and start tagging all tasks that are urgent into it. Create a new dashboard and add a custom widget using the “urgent” folder as a source.

 Add another custom widget and call it “Team’s overdue”. Choose the source space, folder or project for the widget and check the “overdue” checkbox in the “Tasks to do” category on the right-hand side panel.

 Add a projects widget and choose the “red” status filter on the right-hand side panel



Reports

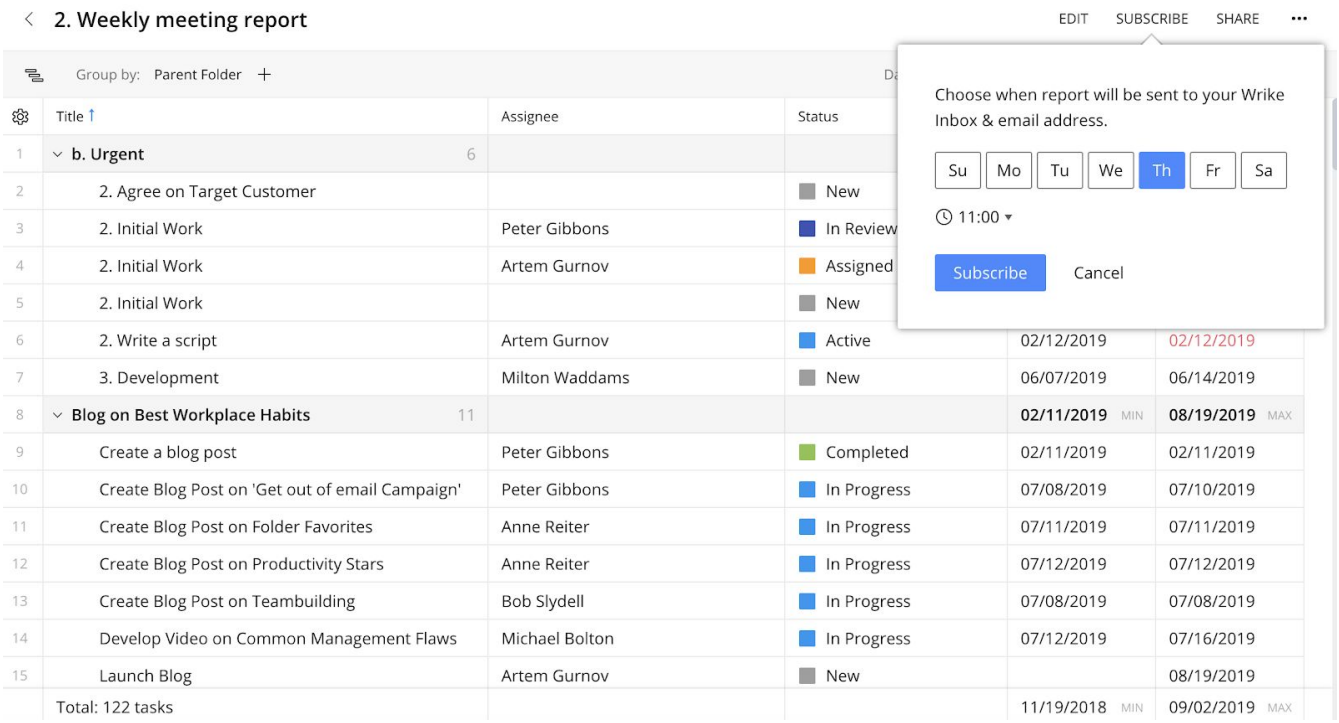
Task-based report for the weekly meetings

 Build a task-based report from scratch

 Toggle the columns in the report on and off to hide the information you don't need to see and to enable the columns that are important to you

 Choose a grouping attribute that suits your needs

 Subscribe to your report to receive an updated version of it directly before the weekly meeting



	Title	Assignee	Status		
1	b. Urgent 6				
2	2. Agree on Target Customer		New		
3	2. Initial Work	Peter Gibbons	In Review		
4	2. Initial Work	Artem Gurnov	Assigned		
5	2. Initial Work		New		
6	2. Write a script	Artem Gurnov	Active	02/12/2019	02/12/2019
7	3. Development	Milton Waddams	New	06/07/2019	06/14/2019
8	Blog on Best Workplace Habits 11			02/11/2019 MIN	08/19/2019 MAX
9	Create a blog post	Peter Gibbons	Completed	02/11/2019	02/11/2019
10	Create Blog Post on 'Get out of email Campaign'	Peter Gibbons	In Progress	07/08/2019	07/10/2019
11	Create Blog Post on Folder Favorites	Anne Reiter	In Progress	07/11/2019	07/11/2019
12	Create Blog Post on Productivity Stars	Anne Reiter	In Progress	07/12/2019	07/12/2019
13	Create Blog Post on Teambuilding	Bob Slydell	In Progress	07/08/2019	07/08/2019
14	Develop Video on Common Management Flaws	Michael Bolton	In Progress	07/12/2019	07/16/2019
15	Launch Blog	Artem Gurnov	New		08/19/2019
	Total: 122 tasks			11/19/2018 MIN	09/02/2019 MAX

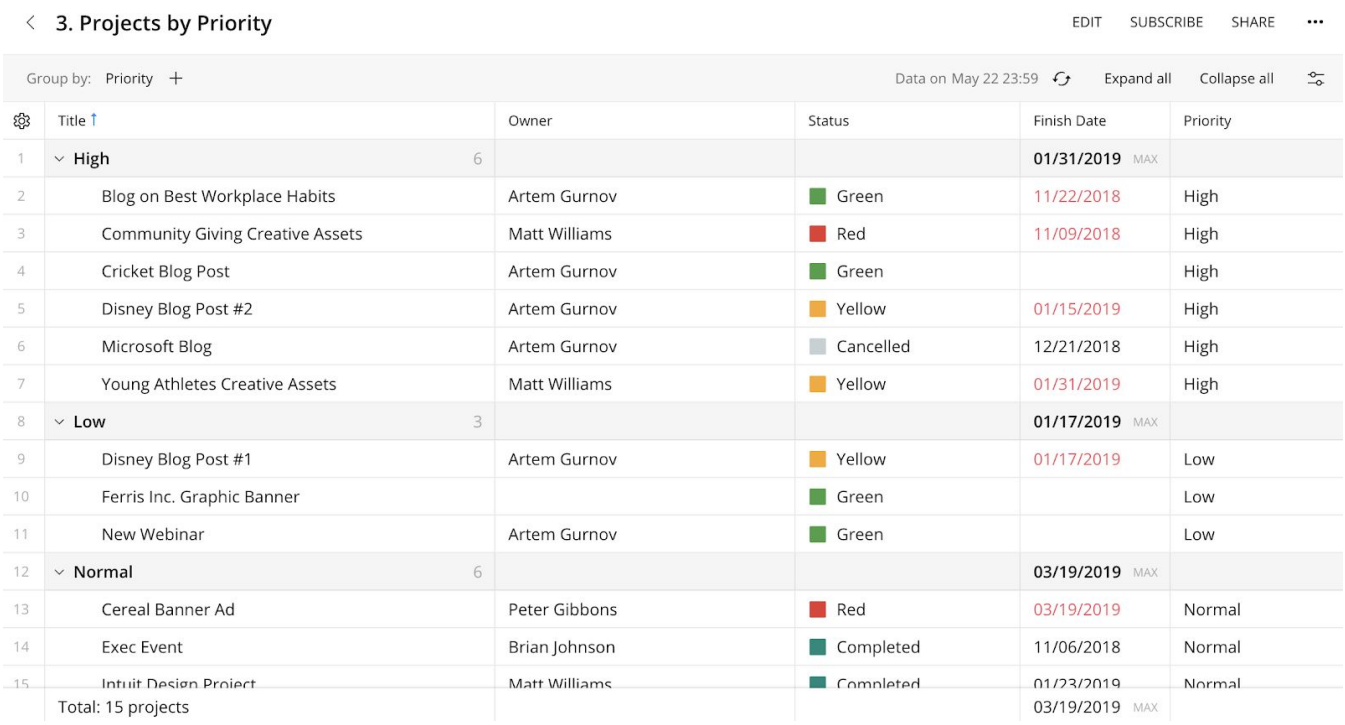
Categorized Project-based report

 Create a dropdown-style custom field on a project level with a predetermined set of values to categorize your projects. Set up the correct values for each of your projects

 Create a project-based report

 Enable the column with project categories by clicking the gear icon and selecting the relevant checkbox.

 [optional] Use project categories attribute as a new grouping criteria to group your projects by category



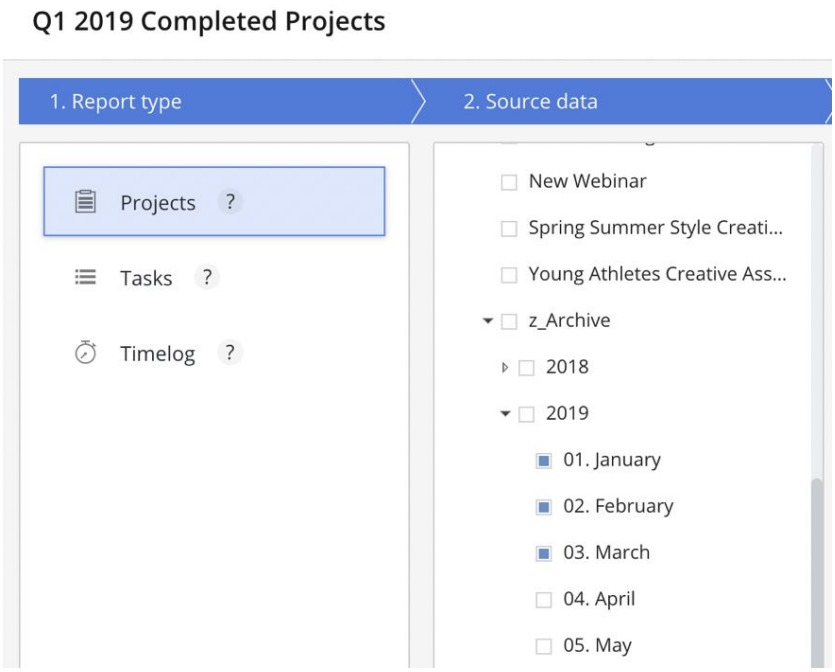
	Title	Owner	Status	Finish Date	Priority
1	**High** 6			**01/31/2019** MAX	
2	Blog on Best Workplace Habits	Artem Gurnov	Green	11/22/2018	High
3	Community Giving Creative Assets	Matt Williams	Red	11/09/2018	High
4	Cricket Blog Post	Artem Gurnov	Green		High
5	Disney Blog Post #2	Artem Gurnov	Yellow	01/15/2019	High
6	Microsoft Blog	Artem Gurnov	Cancelled	12/21/2018	High
7	Young Athletes Creative Assets	Matt Williams	Yellow	01/31/2019	High
8	**Low** 3			**01/17/2019** MAX	
9	Disney Blog Post #1	Artem Gurnov	Yellow	01/17/2019	Low
10	Ferris Inc. Graphic Banner		Green		Low
11	New Webinar	Artem Gurnov	Green		Low
12	**Normal** 6			**03/19/2019** MAX	
13	Cereal Banner Ad	Peter Gibbons	Red	03/19/2019	Normal
14	Exec Event	Brian Johnson	Completed	11/06/2018	Normal
15	Intuit Design Project	Matt Williams	Completed	01/23/2019	Normal
	Total: 15 projects			03/19/2019 MAX	

Historical reports based on completed work

 Create an archive folder in your team's space. Add subfolders representing years and the ones representing months. Once a project is completed, move it to a corresponding month folder in the archive folder.

 When you need to see all the projects completed on a certain month, quarter or year, choose the necessary subfolder or subfolders of the archive folder





Calculating billable hours for a professional services team

 Visit wrike.com/labs and enable the “Calculated Fields in Reports” functionality. Go back to the workspace and refresh the browser tab.

 Make sure that your team members are tracking time in Wrike and adding time entries on the task level

 Enable the “Time spent” and “Hourly rate” columns by clicking the gear icon

 Add a new calculated field. Select the “Time spent” column (click “+” and choose it), enter “*” and then select the “Hourly rate” column.

Add grouping Data on May 23 00:20 Expand all Collapse all

	Title	Assignee	Due Date	Time Spent	Hourly Rate, $	Total
1	Create a blog post	Peter Gibbons	02/11/2019	4h 30m		0.00
2	Create Blog Post on 'Get out of email Campaign'	Peter Gibbons	07/10/2019	5h 30m	20	110.00
3	Create Blog Post on Folder Favorites	Anne Reiter	07/11/2019	4h	20	80.00
4	Create Blog Post on Productivity Stars	Anne Reiter	07/12/2019	8h	20	160.00
5	Create Blog Post on Teambuilding	Bob Slydell	07/08/2019	5h	20	100.00
6	Develop Video on Common Management Flaws	Michael Bolton	07/16/2019	6h	30	180.00
7	Launch Blog	Artem Gurnov	08/19/2019	2h	40	80.00
8	New Marketing Campaign	Artem Gurnov	07/15/2019	16h	100	1600.00
9	Record a video for blog	Anne Reiter		2h	50	100.00
10	Review and approve the blog post	Lawrence Simmons	07/30/2019	10h 30m	20	210.00
11	Schedule it to be released	Milton Waddams	08/06/2019	11h 20m	25	283.33