CLICKUPTRACKER

ClickUp Dashboards: Reporting, KPIs, and Workload Views

Explore ClickUp dashboards for project progress, KPIs, goals, workload, time tracking, sharing, exports, and reporting limits.

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TL;DR ClickUp Dashboards are widget-based reporting surfaces over any list, folder, or space — task counts, status breakdowns, workload, time tracking, goals, and custom-field rollups. They sit on every paid plan, with the Business tier unlocking more widget types and granularity. The strength is breadth — most teams can build a passable executive view without an external BI tool. The weakness is performance at scale and limited transformation logic; warehouse-backed BI tools still win when reporting needs to combine ClickUp data with non-ClickUp data. Verify widget caps and chart limits on the live pricing page.

What ClickUp Dashboards Show

A dashboard surfaces a slice of a workspace — project progress, due work, tasks by owner, custom-field rollups, time tracking, workload, and goal progress. The scope is set by which lists, folders, or spaces feed the widgets.

Dashboards in ClickUp are scoped at creation. A list-scoped dashboard answers project-level questions; a folder-scoped dashboard rolls up across related projects; a space-scoped dashboard supports leadership reads across a whole function.

- **Scope** — list, folder, space, or everything; pick to match the audience.
- **Widget library** — bar, pie, line, number, list, calendar, embed, time tracking, workload, goal.
- **Refresh** — live; data reflects current state without manual recompute.
- **Sharing** — internal members by permission; public link sharing where enabled.
- **Layout** — drag and resize widgets; mobile rendering is acceptable but not gorgeous.

The most common mistake: one dashboard for everyone. Build separate dashboards for the team (operational detail), the team lead (delivery health), and the sponsor (headline status).

> *Scope the dashboard to the audience. Three dashboards beat one universal one.*

Dashboard Cards and Chart Types

The useful widgets are status breakdowns, throughput trends, workload bars, time-tracking summaries, custom-field rollups, and filtered lists. Most other widget types decorate rather than inform.

Pick widgets by question, not by chart type. A dashboard with three insightful widgets beats one with twelve pretty ones — readers can absorb three in a glance and six is the practical upper limit.

- **Number card** — single big metric; useful for headline KPIs.
- **Bar / pie chart** — tasks by status, owner, or label.
- **Line / area chart** — throughput over time; trend matters more than absolute.
- **Workload widget** — capacity per teammate; Business plan and above.
- **Time tracking widget** — billable vs non-billable, total tracked, time vs estimate.
- **Custom-field rollup** — sum money fields for budgets, average rating fields for QA.
- **Filtered list** — overdue, blocked, my-team-only; useful for actionable views.

The widget that should appear on more dashboards: a list of blocked tasks. It is more useful than a chart because it shows the next action, not just the number.

> *Three to six widgets, each answering a real question. A list widget often beats a chart widget.*

KPI, Goal, and Executive Reporting

A KPI dashboard for an executive sits on the same data as the team's view but says less. Headline status, this-period numbers, blocked work, and what changed since last week — four widgets, one screen.

Executives read one screen. The dashboard that goes into a board pack should be a curated subset, not a copy of the team\'s detailed dashboard. Less information, more signal.

- **Status headline** — single field: on track / at risk / behind, color-coded.
- **KPI numbers** — three to five big numbers vs target.
- **Goals progress** — % toward quarterly goals; named owner per goal.
- **Blockers** — list, not a chart; executives need next-action context, not aggregates.
- **Weekly delta** — one-line "what changed since last week" note field.

Reports for clients or external readers usually need branding and curation that ClickUp does not handle natively. Export to PDF and add a one-page summary; do not share the raw dashboard link.

> *Executives read one screen. Less detail, more headline status and "what changed."*

Sharing, Exports, and Scheduled Reports

Dashboards share via URL (members or public), export to PDF or image, and integrate via API or webhook to push data elsewhere. Scheduled reports are limited; most teams use email-on-status-change or third-party schedulers.

The sharing question depends on the audience. Internal share works for teammates; public link for clients or partners; PDF for executives who live in email; CSV for BI ingest.

- **Internal share** — pin the dashboard to a folder; permissions inherit from scope.
- **Public link** — when enabled at the workspace level; useful for client status pages.

- **PDF export** — manual or via Zapier on a schedule for executive readouts.
- **Image export** — useful for embedding in Slack or email.
- **Scheduled reports** — limited natively; pair with Zapier or a custom webhook for cadence-based delivery.

For sensitive data, audit who has dashboard access regularly. Public links are convenient and easy to leave open longer than intended; rotate or disable when no longer needed.

> *Internal share, public link, PDF, CSV — pick by audience. Audit public links periodically.*

Dashboard Limits and Alternatives

ClickUp dashboards are competent but not a BI tool. When reporting needs to combine ClickUp data with non-ClickUp data, or when transformation logic gets complex, a warehouse plus Looker, Metabase, or Power BI wins.

Honest limits: very large workspaces can see dashboard load times degrade; private tasks and add-on data may not appear in widgets; certain widget types are plan-restricted.

- **Load time** — workspaces with tens of thousands of active tasks may need to scope dashboards more tightly.
- **Private tasks** — excluded from widgets the viewer cannot access; can skew aggregates.
- **Plan-restricted widgets** — some widget types live on Business or above; verify on pricing page.
- **BI alternatives** — Looker Studio, Metabase, Power BI, Tableau via API export to warehouse.
- **Common complaints** — limited drill-down, no SQL-style transforms, mobile rendering rough on dense layouts.

The rule of thumb: when stakeholders ask for joins between ClickUp data and Salesforce, NetSuite, or analytics data, move to a warehouse-backed BI tool. ClickUp dashboards are best inside ClickUp\'s data.

> *Strong inside ClickUp's data. Move to BI when reporting needs joins, transforms, or scheduling depth.*

FAQ

How many dashboards can I create in ClickUp?
Free has a small cap; Unlimited and Business raise the limit significantly. Verify exact widget and dashboard counts on the current pricing page; ClickUp has shifted these limits more than once.

Can I schedule a dashboard to be emailed?
Not natively. Most teams pair ClickUp with Zapier or a custom webhook to send a PDF or image on a schedule. Some workspaces use the public dashboard link in a recurring email instead.

Do ClickUp dashboards include data from private tasks?

Only for viewers who have access to those private tasks. Widgets exclude data the viewer cannot see, which can make aggregates inconsistent between viewers. Plan privacy posture before relying on dashboards for company-wide reporting.

Can ClickUp dashboards combine data from multiple workspaces?

No — dashboards are scoped within one workspace. For cross-workspace reporting, export via API to a warehouse and use a BI tool.

What is the best dashboard for a project manager?

Five widgets: status by owner, overdue list, blocked list, workload, and a throughput trend. Pin it to the side menu, open it in standup and weekly review, and retire it if it stops driving decisions.

Full article: https://clicktracker.info/clickup-dashboards