

Workload

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Workload provides a way to visualize how much work each team member has been assigned, what those work items are, and when they are due to help balance the workload across the team. Leverage Workload view by work count or level of effort to quickly and easily view the full scope of what your team has on their plate and better understand when new projects can be added. Reference Workload view in your standups and one-on-ones with your team.

Getting Started with Workload

From your Global Navigation select Workload.

8	Good morning, Christy 💭
Q Search	MY WORK ALL WORK
🔿 Dashboard	Hot Sheet
🖈 Campaigns	
D Projects	No Incoming Requests
🗹 Work	
🛛 Requests	Mu Dumunta
🔁 Reviews	<u>My Requests</u>
🛱 Calendars	
L Workload	Tasks & Proofs Due Next
A People	
II Templates	 Pull branding material <u>True Soap Email Blast</u>

Workload views display all work that a user has permission to view. Additional filters can be applied to restrict what is displayed. By default, Workload will show work items by count.

8	Workload	Workload					
۹	Workload	Add a filter					# Work Item Count 🗸
¢ ₽	CUSTOM VIEWS Copy			Work Item Count Over Capar	city 🛷 Time Off		
D	Design Team		MON, OCT 25	TUE, OCT 26	WED, OCT 27	THU, OCT 28	FRI, OCT 25
☑	Marketing Team + Add View	Caleb Eisenhower					
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8		Calli Edgerton					
⊾ ∧		Christy Drucker >					
•			3 work terms	4 work items	2 work items	3 work items	3 work tern
ш		Grace Deng >					
۵			3 work items	1 work item		1 work item	2 work item
		Gwen Derby					
•			1 work item		1 work item	1 work item	2 work item

Click and drag from side to side in the calendar to view future dates. Past dates are not currently viewable in Workload.



Workload					
People (6) v +					Clear V # Work Item Count V
		 Wor 	k Item Count 🛛 😑 Over Capacity	🖉 Time Off	
		MON, OCT 25	TUE, OCT 26	WED, OCT 27	THU, OCT 28
Caleb Eisenhower	>				
			1 work item	1 work item	
Christy Drucker	>				
		3 work items	4 work items	2 work items	3 work items
Grace Deng	>				
-		3 work items	1 work item		1 work item
Gwen Derby	>				
		1 work item		1 work item	1 work item

In the upper right corner of the workload view, click **Work Item Count** to select between viewing by Work Item Count (https://guide-ignite.inmotionnow.com/help/workload#workload-by-work-item-count)Or Level of Effort. (https://guide-ignite.inmotionnow.com/help/workload-by-level-of-effort)

	# Work I	tem Count
OCT 27	# Work Item Count 관 Level of Effort	✓
rk item		1 work item

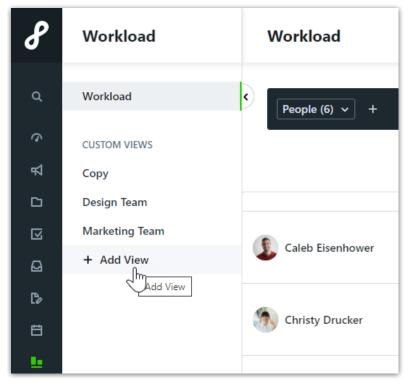
Work items without due dates will not appear in these views. Work items with only a start date will appear in LOE view, but not work count.

Select **Add a Filter** to narrow your view down by People and/or Specialties.



Workload	
Add a filter	🔵 Work Item Count 🛛 🗨 O
People Specialties	TUE, OCT 26
CE Calli Edgerton	1 work item

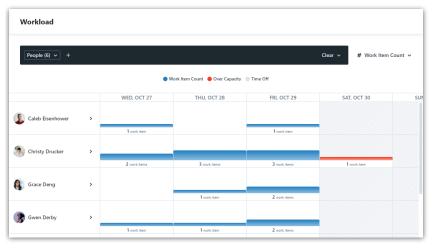
Select + Add View to create a Custom View (https://guide-ignite.inmotionnow.com/help/custom-views#getting-started-withcustom-views) that you can return to or set as your Default View.



Workload by Work Item Count



Work Item Count view shows the number of work items each person has due on each day. In the example below, you can see that the work items due on regular business days are blue. Non-business days are grayed out and as a result, any work items due on that day will show red. The bottom of each calendar date shows the total number of work items due on that date.



Workload by Level of Effort

Level of Effort shows the number of hours allocated to each person by day compared to hours available, as configured in each user's personal availability settings. Allocated LOE will show dark blue and availability is light blue. When the number of hours allocated surpasses the number available in a day, the LOE will display as red.

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¢ ₽	CUSTOM VIEWS			Level c	of Effort 🛛 Availability 🔵 Over C	apacity 🛞 Time Off		
D	Design Team			MON, OCT 25	TUE, OCT 26	WED, OCT 27	THU, OCT 28	FRI
R	Marketing Team	Caleb Eisenhower	,					
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ß								
8		Christy Drucker	`	5h 11m / @h	3h 7m / th	4h 30m / @s	9h 30m / th	3h.
<u>1</u>				on Tim / en	an /m / en	4n 30m / en	9m 30m / in	an.
٨		Grace Deng	>					
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Viewing Individual Work Items in Workload

Select the expand icon to the right of a users name to expand the view and show individual work items due.



Workload			
People (6) v +			
		• w	'ork Item Count 🛛 🛑 Over Capaci
		MON, OCT 25	TUE, OCT 26
Caleb Eisenhower	>		
Christy Drucker	میں	3 work items	1 work item
Grace Deng	>		
		3 work items	1 work item

Work items will display both vertically and horizontally by when they are due, leaving room for items with start dates to span across the calendar. In the example below, there are three items due on Monday that show at the top. Three out of the Four items due on Tuesday have start dates.

Workload							
People (6) v +						Clear ~	# Work Item Count 🗸
			🔵 Work Item Count 🛛 Over Ca	pacity 🗇 Time Off			
	MON, OCT 25	TUE, OCT 26	WED, OCT 27	THU, OCT 28	FRL OCT 29	SAT, OCT 30	SUN, OCT 31
Christy Drucker	3 work items	4 work herrs	2 work items	3 work herro	3 work haves	1 work item	_
	 Script approval True Soap Suntiower Ad Pull branding material True Soap Fall Campal Proof for review True Soap Fall Campal 	Customer Appreciati					
	Ist draft of copy due	True Soap Social Media Req True Soap Social Media Req					

Scrolling down and to the right, you see work items due on future days.



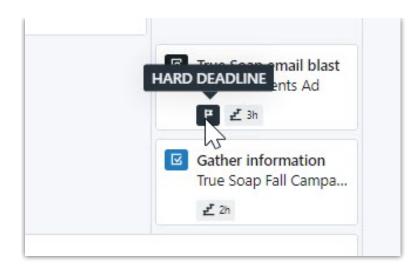
Workload People (6) v + # Work Item Count ~ 🔵 Work Item Count 🔴 Over Capacity 🛛 🖉 Time Off MON, OCT 25 TUE, OCT 26 WED, OCT 27 , OCT 24 THU, OCT 28 FRI, OCT 29 SAT, OCT 30 Christy Drucker Script approval rue Soap Sunflower .. 6 Pull branding material True Soap Fall Campaign - True Soap Soc. Proof for review True Soap Fall Campaign - True Soap Soc.. Customer Appreciati.. Get copy approved by team True Soap Fall Campaign - True Soap Social Media Request 1st draft of copy due True Soap Fall Campaign - True Soap Social Media Request True Soap Spring Scent Ad Summer Scents Ad

Click on a work item name to open the task or proof modal. If a work item is part of a project, you can click on the project name to be taken directly to the project. Hovering over truncated work and project names will show the full name.

		MON, OCT 25	TUE, OCT 26
Christy Drucker	~		
		3 work items	4 work items
		Compare approval True Soap Surfigure	
		Pull branding ma True Soap Fall Ca	

When applicable, badges for Level of Effort and Priority will show at the bottom of the work item tile. Hover over the priority badge to view the priority name.





Viewing Overdue Work in Workload

Toggle on **Overdue Work** from the **Options** dropdown menu to see individual users overdue tasks or proofs. Overdue items will not go towards the work item count or LOE for that day so not to inflate a user's workload.

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Time C	Overdue Work	
1 /////	SUN, DEC 5	MON, DEC
	0 Tasks/Proofs	0 Tasks/Pr

Select the expand icon next to a users name to show potential overdue tasks or proofs. Any overdue items will display in red on today's date.



		FRI, DEC 3	S/
Caleb Eisenhower	>	1 Task/Proof	0
Christy Drucker	ک ر ال		
		2 Tasks/Proofs Sunflower Video	0
		Stakeholder review Sunflower Scent Social	
		Gather information True Soap Fall Campai	
		Design / Size images Sunflower Scent Social	