

Screendragon Release Notes

7.5



screendragon™

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Resourcing Workflows

We're excited to introduce **Resourcing Workflows**, a powerful new feature that automates resource item creation as workflows progress through their steps. This enhancement streamlines project planning, ensures accurate resource allocation, and minimizes manual effort. In addition, users can now initiate workflow actions directly from the **Resource Planner**, giving project teams greater flexibility and control.

Key Features: Workflow-Triggered Resource Item Creation

- As workflows advance through defined steps, resource items (such as bookings or tasks) can be automatically generated based on trigger conditions.
- The triggered task interface can display pre-populated fields using data pulled from the initiating form, saving time and ensuring consistency.

Predefined Resource Allocations

- Resource allocations can be automatically created and assigned to the right users as workflows progress.

Timesheet & Reporting Integration

- Resource items created via workflow triggers are visible in Timesheets, aligned with your site's time sheeting setup:
- Task-level Time Sheeting: Items appear as discrete tasks.
- Project-level Time Sheeting: Items are grouped under "Unscheduled Hours," unless further customized.

Reporting Support includes:

- Timesheet Reports
- Task Reports
- Resource Reports
- Export Reports

Benefits

- Automates resource task creation, reducing admin workload.
- Improves visibility and accountability in project planning.
- Streamlines workflows and resourcing operations.
- Enhances reporting and integrates with time tracking.

The screenshot displays the Screendragon software interface. The top navigation bar includes links to Dashboard, Projects and Requests, #1 - Form Testing, #2 - Workflow Testing, #3 - Project, Specific Area tests, Reports, People, #11 Resource Manager, and Library and Workspace. The main content area is titled "#2.2.4 - Workflow Triggers - Create New Item - Project" and shows a table of tasks. The table has columns for Task Name, Start Date, End Date, Hours, Assigned To, Created By, Action Taken, and Created On. The table lists three tasks, all named "AB Test 3", with start and end dates of 03 Apr 2025 and 07 Apr 2025, and a duration of 8 hours. The tasks are assigned to Alex O'Brien, Screendragon Administrator, and Aisling Katie O'Connor. The right sidebar shows a "Design Creation" section with options to "Add a Comment to the Workflow", "Send to Traffic", "Send for Review", "Send to Design", and "Send for Review".

Task Name	Start Date	End Date	Hours	Assigned To	Created By	Action Taken	Created On
AB Test 3	03 Apr 2025	07 Apr 2025	8	Alex O'Brien	Screendragon Administrator		03 Apr 2025 4:47:03 PM
AB Test 3	03 Apr 2025	07 Apr 2025	8	Screendragon Administrator	Screendragon Administrator		03 Apr 2025 4:47:03 PM
AB Test 3	03 Apr 2025	07 Apr 2025	8	Aisling Katie O'Connor	Screendragon Administrator		03 Apr 2025 4:47:04 PM

Update to Task Assignment Notifications

Projects/Tasks

Update/Addition to Existing feature

We've improved how task notifications work when tasks are imported between projects, ensuring assignees are properly informed and giving project managers more control over notifications.

What's New?

Assignment Notifications for Imported Tasks

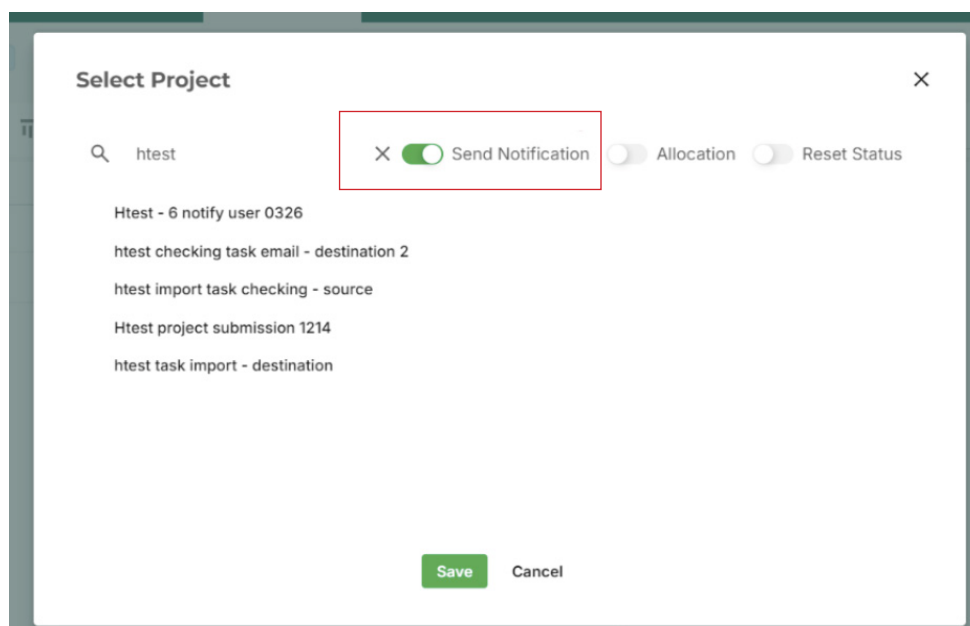
When tasks are imported from a source project into a destination project, **assigned users will now receive task assignment emails** (if notifications are enabled in their profile settings). This brings imported tasks in line with manually created tasks, which already trigger assignment notifications.

Opt-Out Control

A new toggle has been added to the “**Import Tasks from Existing Project**” dialog. Project managers can use this option to suppress assignment notifications during imports if notifications are not needed.

Benefits

- Keeps users informed when they are assigned tasks through imports.
- Reduces the risk of missed assignments or miscommunication.
- Provides flexibility for admins and project managers to choose whether notifications should be sent.



Other Enhancements & Improvements

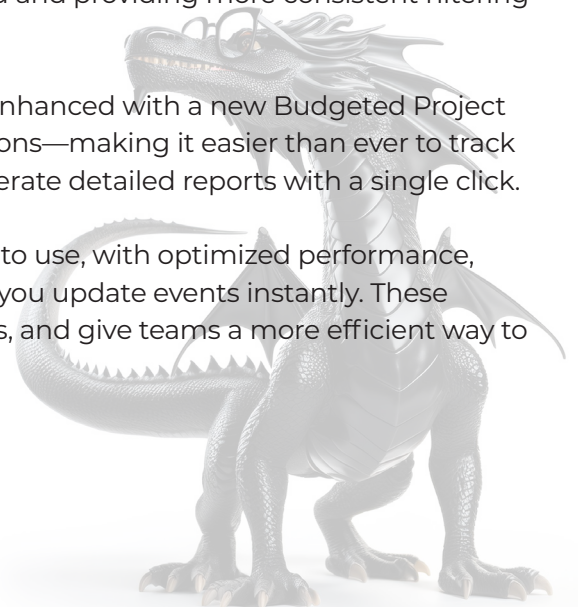
Features that Have Been Updated

As always, each release includes a lot more than what is listed here—things like bug fixes, security updates, and infrastructure improvements that keep Screendragon running smoothly. But here are a few smaller updates we thought you'd actually care about. If something catches your eye and you'd like to know more, just ask your Screendragon rep!

Timeline Subtasks Now Visible in Gantt Filtering: Timeline subtasks now display correctly in **Gantt view** when using the timeline filter, ensuring no tasks are missed and providing more consistent filtering behavior across the platform.

Budgeting Tab Updates: The Budgeting tab in Tasks has been enhanced with a new Budgeted Project Hours column, resource-level breakdowns, and Excel export options—making it easier than ever to track planned vs. actual efforts, manage budgets proactively, and generate detailed reports with a single click.

Marketing Calendar Improvement: This is now faster and easier to use, with optimized performance, on-demand filters, and new right-click workflow actions that let you update events instantly. These enhancements reduce wait times, keep data in sync across views, and give teams a more efficient way to manage bookings and schedules.



Other Enhancements & Improvements Cont...

Fixed Estimates: Fixed Estimates just got smarter and easier to use! Phase 3 brings client-driven updates that save time and reduce errors, including customizable titles, drag-and-drop task reordering, weekday-only date selection, and simpler role editing—helping teams manage complex estimates with greater flexibility, clarity, and efficiency.

Track Role Changes with Ease: Easily track and report on user role changes with the new User Role Reporting enhancements. You can now view role history directly in the Report Builder, automate report delivery, and combine role data with user profiles for clearer insights—saving time and improving accuracy in KPI and financial reporting.

