Screendragon Release Notes



screendragon™

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Enhanced Bulk Actions

Feature Enhancement

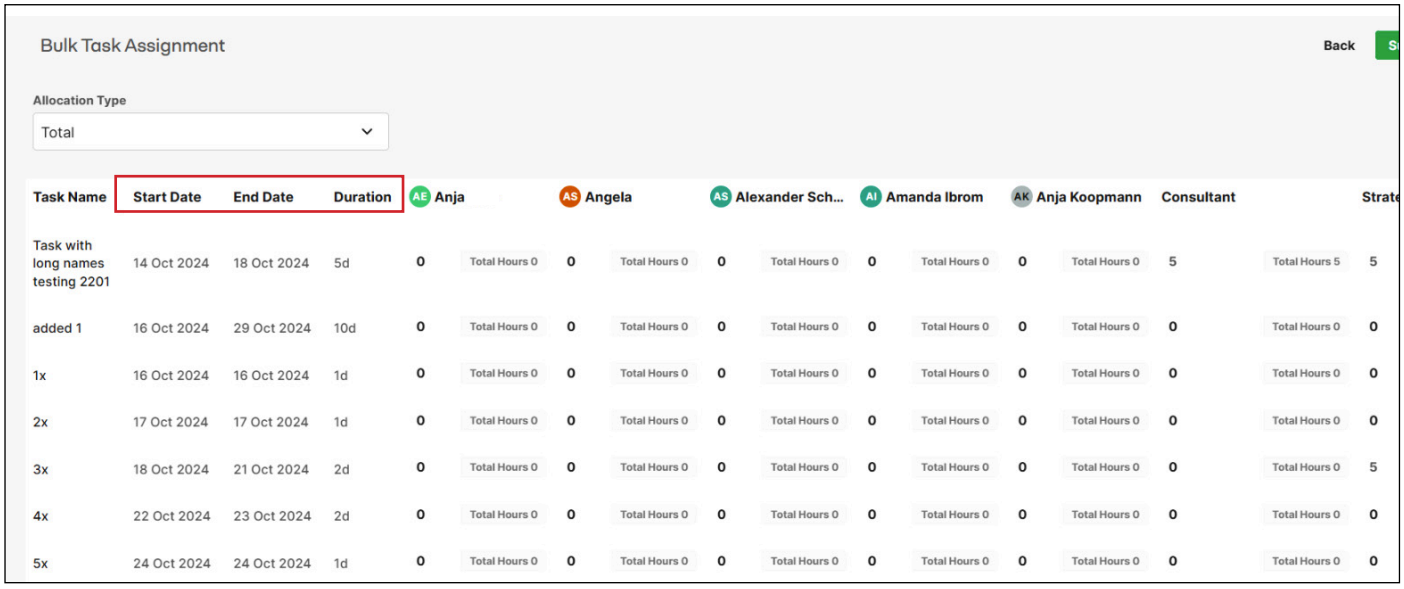
We have enhanced the bulk allocation by including **Duration** and **Start/End Date** columns.

Duration Column: This column displays the number of days for each task, providing clarity on the length of each booking.

Start/End Date Columns: These columns present the start and end dates for tasks, allowing for easier identification of bookings, especially when tasks have similar names.

These additions improve user experience and assist in accurately determining allocation hours to be assigned.

Bulk Task Assignment



Grouping and Kanban for Workflows

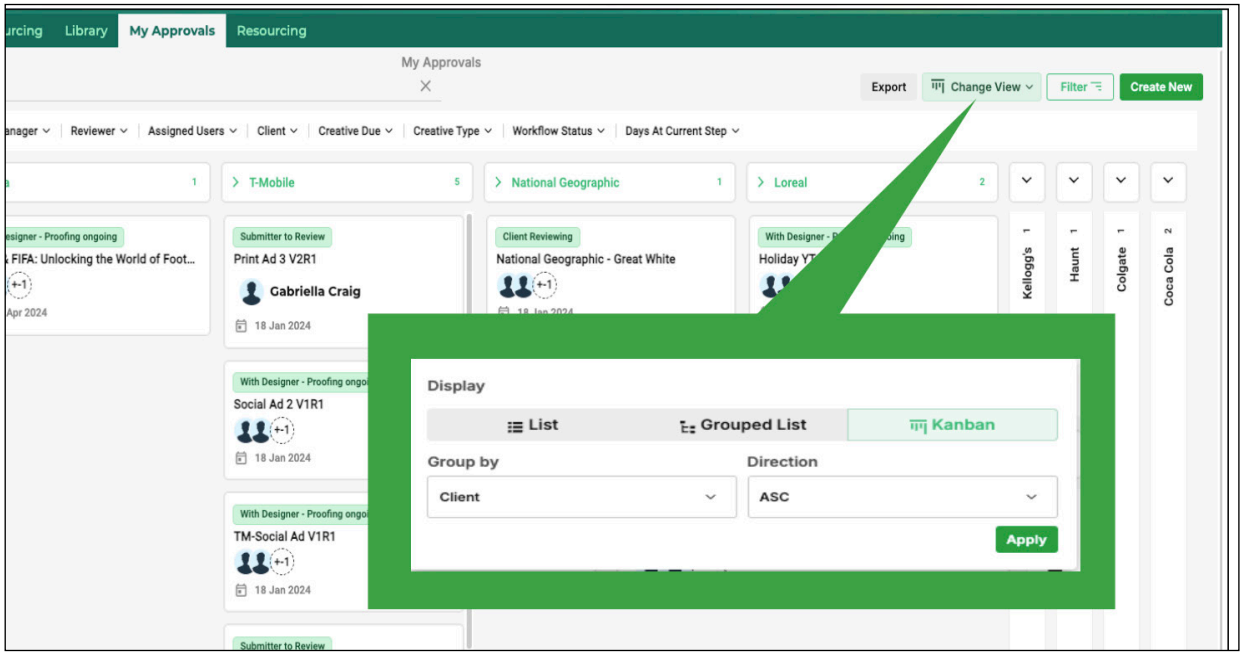
We are excited to introduce several enhancements to the Grouping and Kanban features within the List View.

- **New Grouping and Kanban Options**: Users can now enable grouping by various criteria and utilize Kanban views for better project management.
- **List Manager Configuration**: Grouping settings can be configured per column within the List Manager. (Note that certain field types, such as inode, are not permitted for grouping or Kanban views.)
- **Consistent Result Sorting**: The results in each list or group will follow the same sort order applied to the columns, ensuring a uniform view.
- **Enhanced List/Group Sorting**: A new dropdown has been added to enable sorting options for lists and groups.

Grouping View Enhancements:

- **Load More Per Group**: Users can now load additional records for each group as needed.
- **Count Per Group**: A count of items within each group is now displayed for better visibility.
- **Default Load of 5 Records**: Initially, the view will load five records per group for a streamlined experience.

Workflow Status View



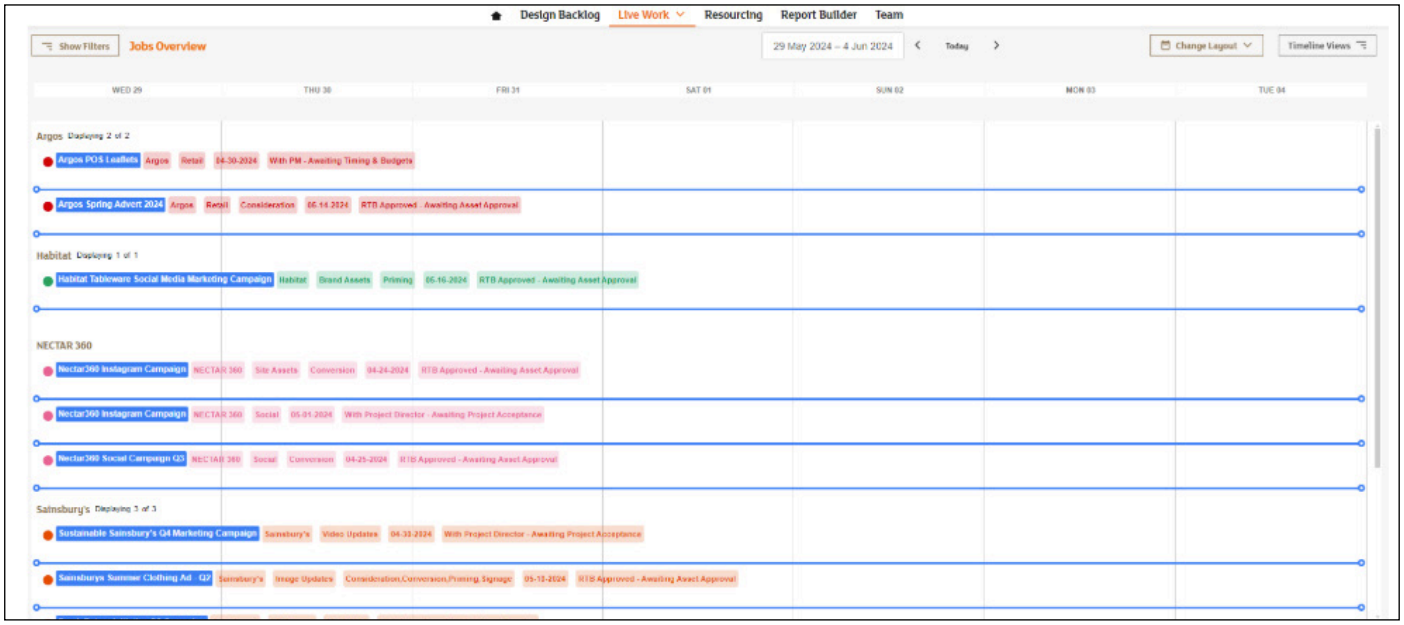
Calendar View Update

In response to feedback from clients regarding the current calendar view, we are excited to propose enhancements that will allow for improved visualization of daily jobs:

- **New One-Day View**: Users will now have the option to view their calendar in a single-day format, allowing for better management and oversight of daily tasks.
- **Optional Three-Day View**: In addition to the one-day view, a three-day view will also be available, providing flexibility for those managing a higher volume of jobs.
- **Improved Screen Real Estate:** These new views will provide more screen space for job tags, enhancing the user experience.

These enhancements are aimed at accommodating the needs of our users, particularly those handling 300-400 jobs per day, enabling them to visualize their workload more effectively.

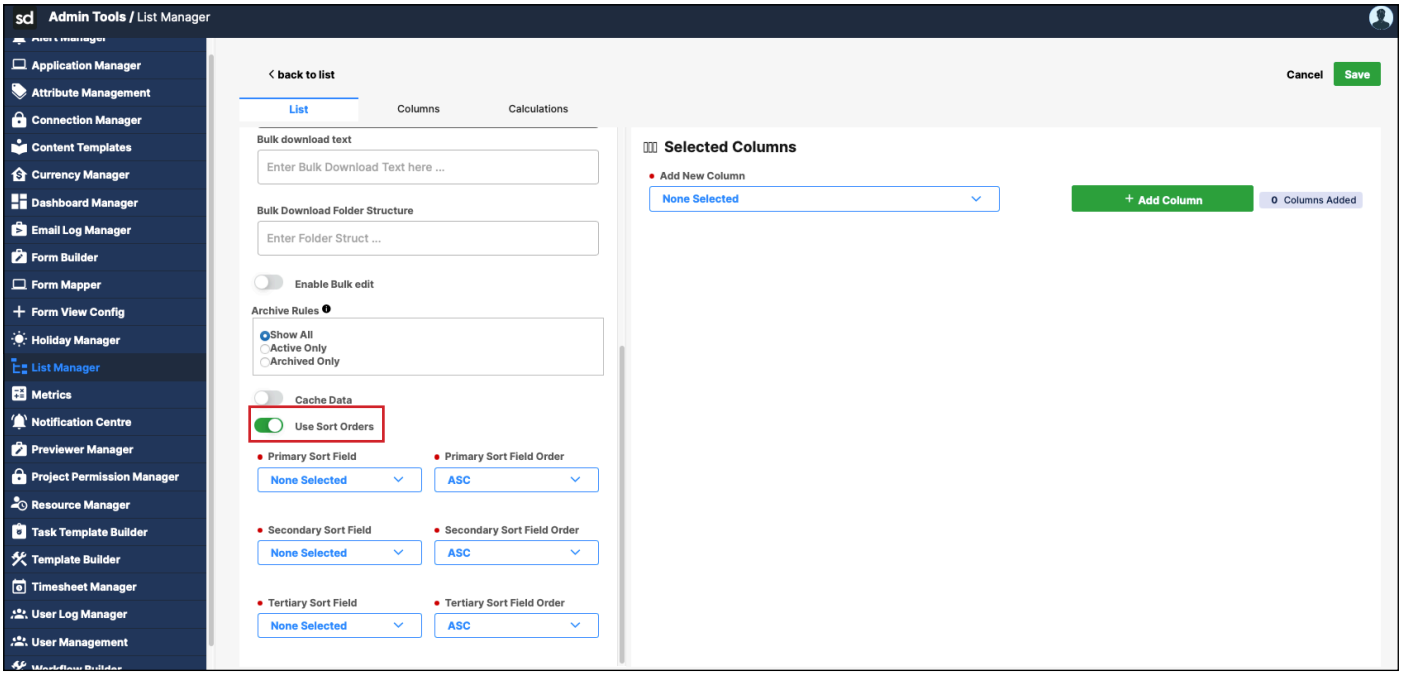
The form view configuration tool will offer both the one-day and three-day view options. These new views provide more screen space for job tags, enhancing the user experience..



Enhanced List Sorting

We are pleased to announce significant enhancements to the sorting functionality within list views. These enhancements provide users with greater control over how data is organized and displayed.

- **Multiple-Level Sorting**: Through the List Manager, users can now set sort orders at multiple levels—primary, secondary, and tertiary. This allows for improved organization of items within lists.
- **Default Sorting Behavior**: By default, lists auto-sort by the **Created** date, displaying the newest items at the top when first opened. The system remembers their preferred settings if users change the sort order.
- **Configurable Sort Fields:** Users can specify sort fields from a selection of meta columns or system values, including Created date, ID, Step entry date, and Due date. For each sort option, users can choose ascending or descending order.
- **Dashboard Widget Integration**: Dashboard widgets that utilize lists will now automatically apply the primary sort settings from the List Manager, simplifying the management of sorting within dashboards.
- **Front-End Sorting Behavior**: Only the primary sort field is overridden when users sort a column, while existing secondary and tertiary sort methods remain intact. This ensures consistency in how items are displayed. For example, if a user sorts by client name but has multiple items with the same name, those will automatically be sorted by created date in ascending order.



Custom Capacity View Color Settings

We are pleased to announce a new enhancement for custom percentage color assignments within the capacity views.

- **Custom Color Coding for Hours**: Admins can now set specific color codes for capacity hours as follows:
  Less than 35 hours = Yellow
  35 to 45 hours = Green
  Greater than 45 hours = Red

- **Site-Wide Formatting Rules**: To ensure flexibility and transferability, admins can apply formatting rules across the site using the Resource Manager (RM) tool. This feature is an addition to the RM Filter Settings.

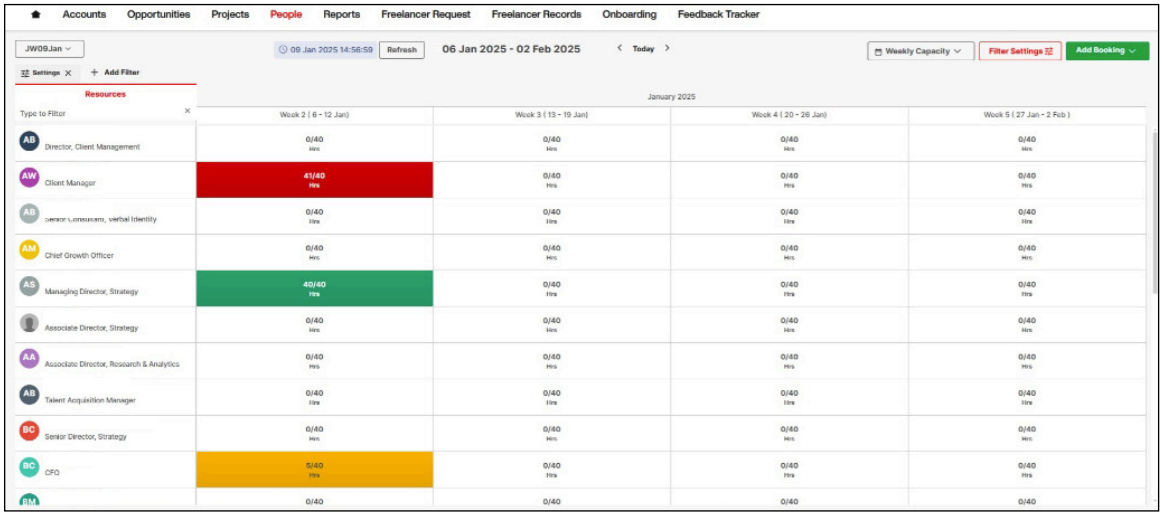
- **Conditional Formatting Based on User FTE**: Admins can establish conditional formatting based on user Full-Time Equivalent (FTE):
  If User FTE < 85% = Green
  If User FTE > 110% = Red

- **Integration with Capacity Filters**: This new RAG (% Red, Amber, Green) setup will specifically apply to the capacity filters. The default settings (0-100% = Green, anything >100% = Red) remain unchanged unless the new settings are opted in.

- **Consistency Across Views:** The custom color settings are reflected in the capacity view and resource view to maintain consistency throughout the user experience.

- **Opt-In Feature**: This enhancement will not affect existing sites, as it requires an opt-in to enable the new color and FTE range settings through the Resource Manager. If not selected, site settings will default to existing configurations.

This enhancement aims to improve visibility and user understanding of capacity management, enabling more effective resource allocation and planning.



Performance Improvements

1 Features that Have Been Updated

Grid Refresh Performance: Previously, uploading a file would trigger a full grid refresh, causing a noticeable delay. With this release, users can now upload files seamlessly without experiencing the grid refresh delay, resulting in a smoother and more efficient file upload experience.

Audit Trail Performance: We have improved the performance to ensure a faster and more responsive experience.

Matrix Storage: We previously migrated Matrix storage from SQL to MongoDB. Although this move was completed, it was never fully deployed live. This release is to reactivate and implement that migration. The changes are particularly beneficial for sites with large and multiple matrices.

