Release Notes

This latest ESM update simplifies and accelerates how you organize, access, and export summary list views, significantly enhancing your data management and reporting experience. The new improved functionality is designed to save you time and effort.

New features include:

1. Improved Column Chooser and Enhanced Filter
2. Easily Save, Access, and Share Customized Views
3. Reorganized Manage Layouts and Set Default Settings
4. Export any List into Excel
5. Column Reordering via Drag-and-Drop

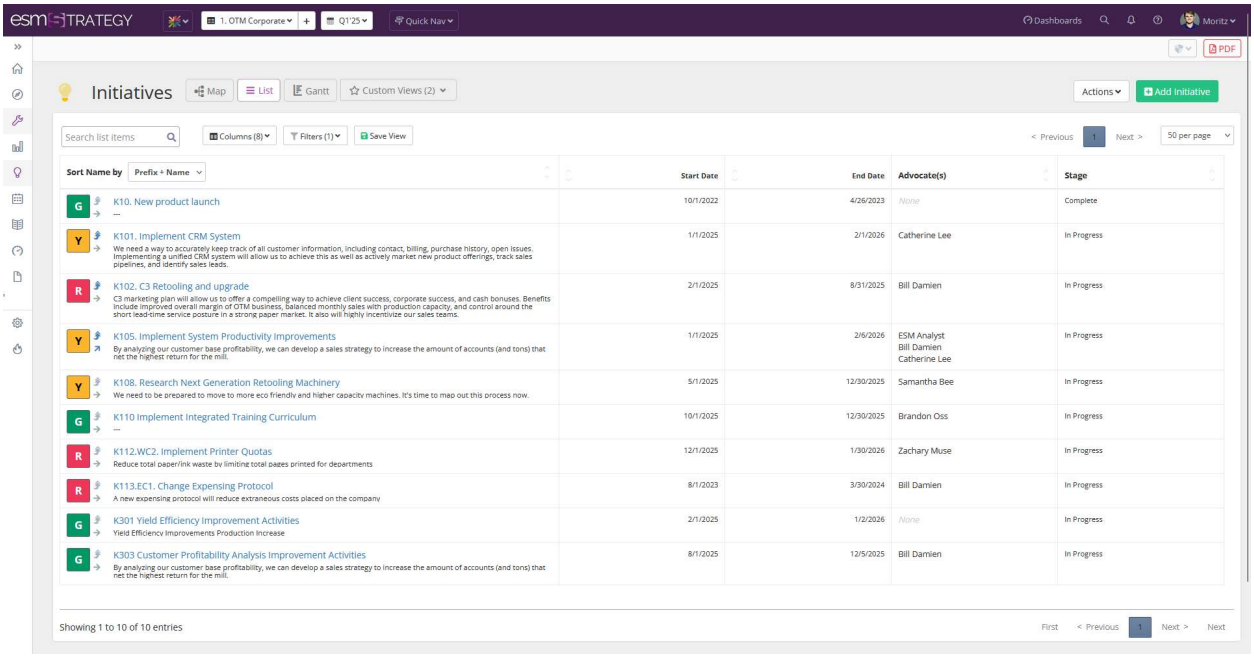
Release Overview (7/22/2025) – Summary List View Update

Improved Column Chooser and Filter

Customize your list views instantly with our enhanced Column Chooser. Quickly add or remove columns using the dropdown menu at the top of your summary list.

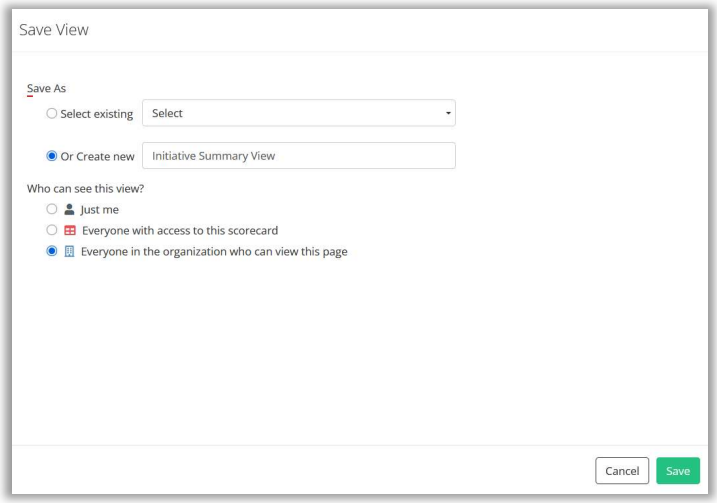
Filters help to quickly narrow down data based on key criteria, including Ownership, Bookmarks, Status, and Update Completion.

This allows you to instantly find and focus on the information you need most, streamlining your workflow and reducing time spent searching for relevant data.

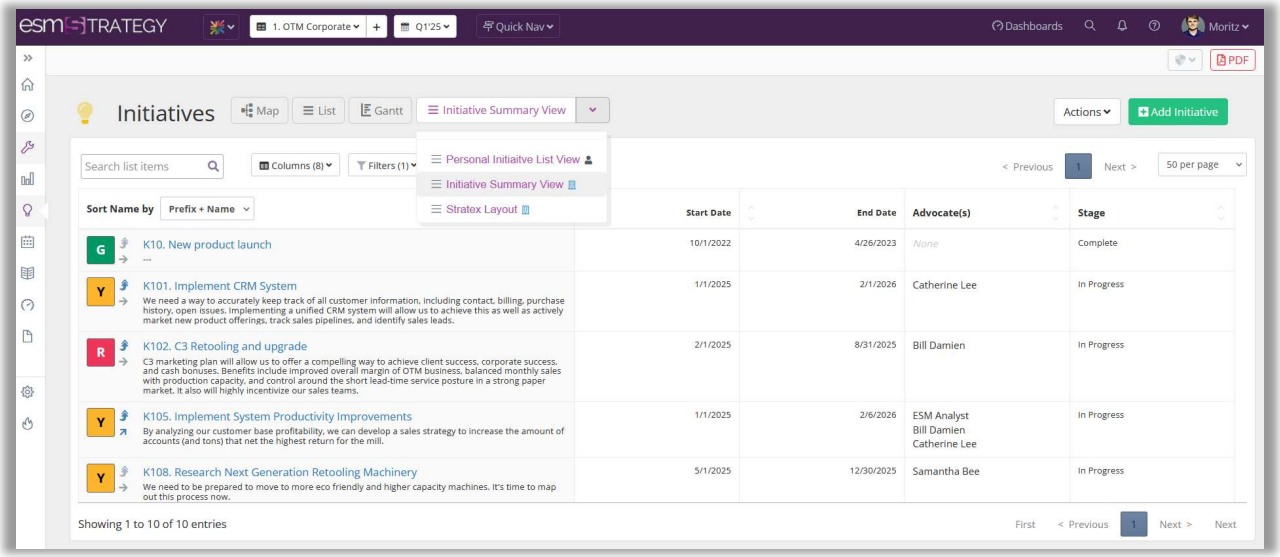


Easily Save and Access Configured Views

Whenever you change your column or filter selection, a save button will appear next to the dropdowns. Simply click the button to save your current selection so you can easily access them next time. Additionally, you can share the view with your colleagues.

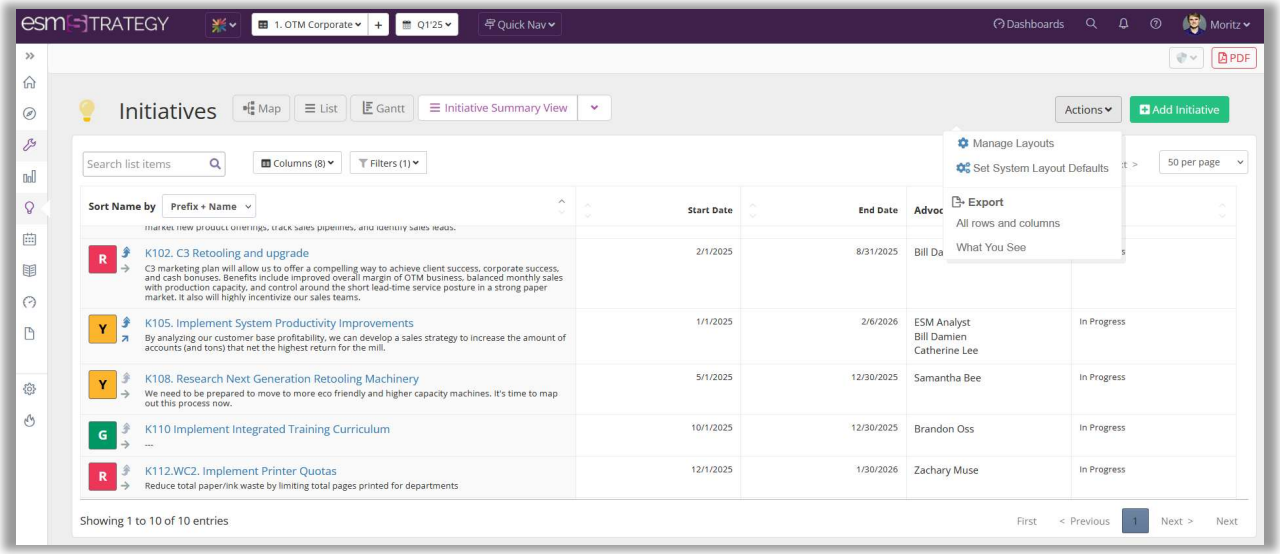


This allows you to easily jump between customized views and quickly access your most important data configurations.



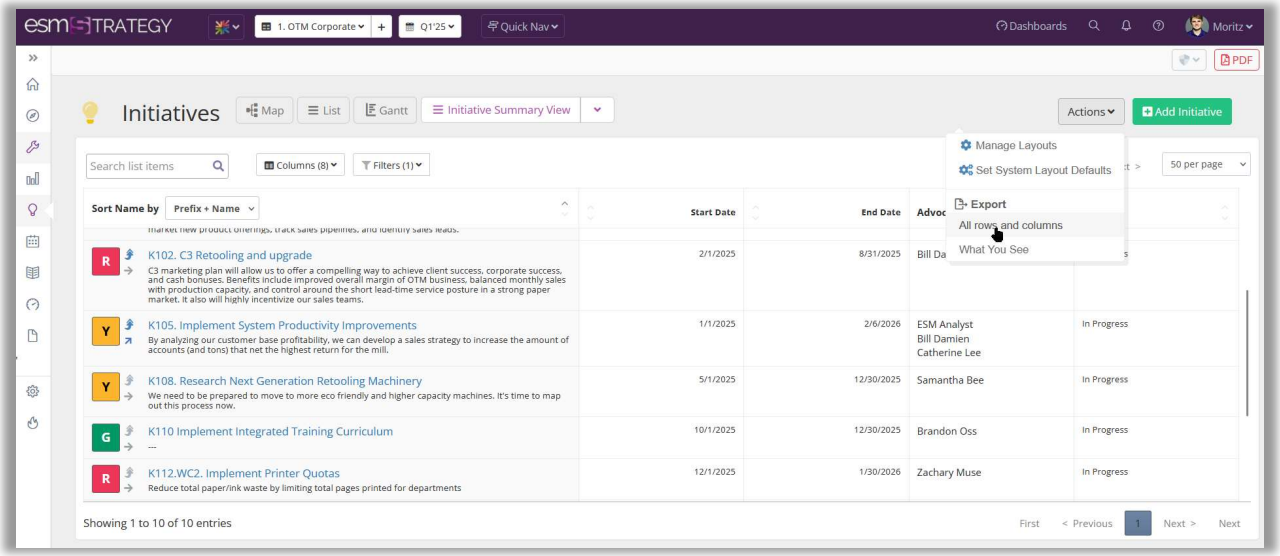
Reordered Manage Layouts and Set Defaults Functionality

The "Manage Layouts" and "Set System Defaults" functionalities have been streamlined and moved into the Actions menu, simplifying your navigation and making it quicker to configure system settings.

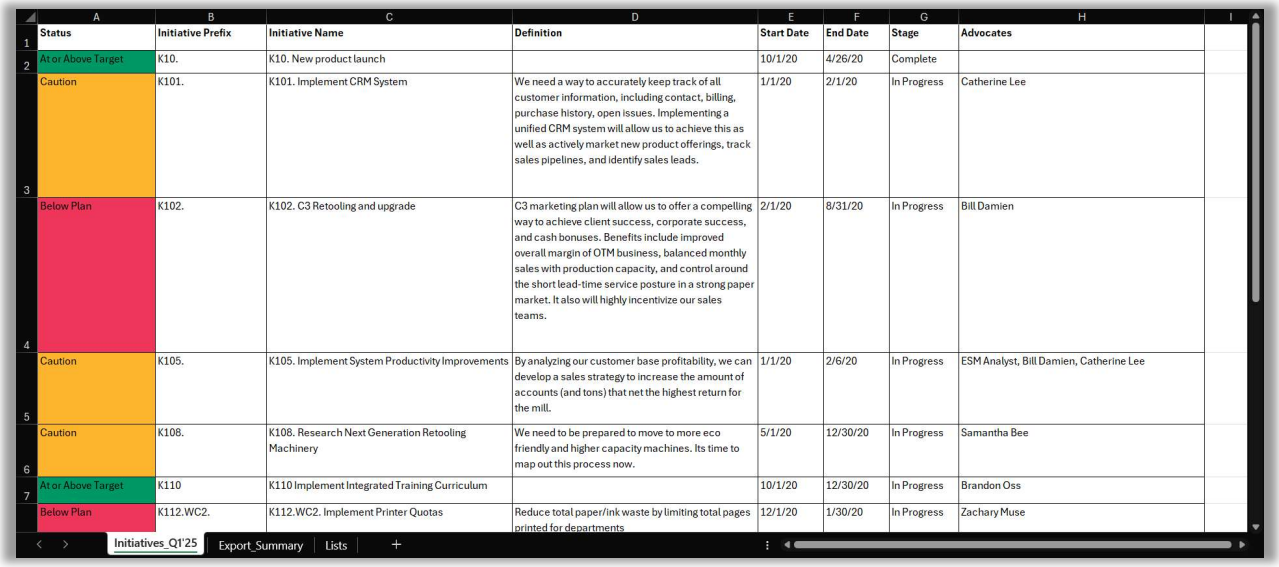


Export Lists into Excel

You can now export any of the views to Excel. You can either export all rows and columns for the element type, even if not currently selected, or export ‘What You See’, so the list is based on your current filters and columns, including numeric data.



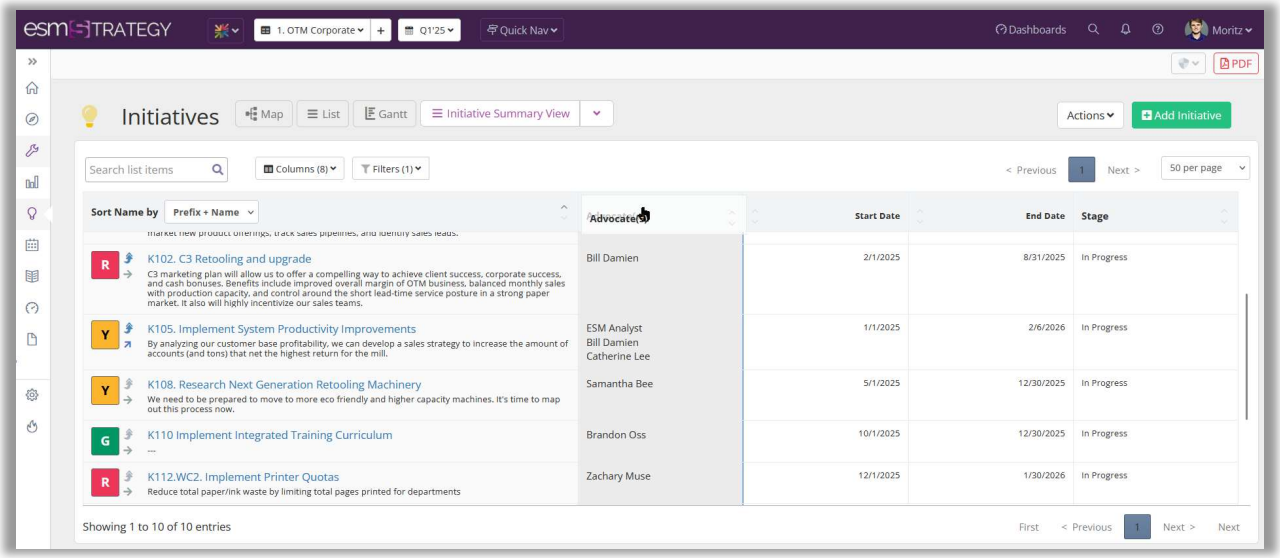
Edit and further refine your reports easily within Excel, streamlining your reporting and analysis processes, possibly saving hours of manual data entry.



	Status	Initiative Prefix	Initiative Name	Definition	Start Date	End Date	Stage	Advocates
2	At or Above Target	K10.	K10. New product launch		10/1/20	4/26/20	Complete	
3	Caution	K101.	K101. Implement CRM System	We need a way to accurately keep track of all customer information, including contact, billing, purchase history, open issues. Implementing a unified CRM system will allow us to achieve this as well as actively market new product offerings, track sales pipelines, and identify sales leads.	1/1/20	2/1/20	In Progress	Catherine Lee
4	Below Plan	K102.	K102. C3 Retooling and upgrade	C3 marketing plan will allow us to offer a compelling way to achieve client success, corporate success, and cash bonuses. Benefits include improved overall margin of OTM business, balanced monthly sales with production capacity, and control around the short lead-time service posture in a strong paper market. It also will highly incentivize our sales teams.	2/1/20	8/31/20	In Progress	Bill Damien
5	Caution	K105.	K105. Implement System Productivity Improvements	By analyzing our customer base profitability, we can develop a sales strategy to increase the amount of accounts (and tons) that net the highest return for the mill.	1/1/20	2/6/20	In Progress	ESM Analyst, Bill Damien, Catherine Lee
6	Caution	K108.	K108. Research Next Generation Retooling Machinery	We need to be prepared to move to more eco friendly and higher capacity machines. Its time to map out this process now.	5/1/20	12/30/20	In Progress	Samantha Bee
7	At or Above Target	K110	K110 Implement Integrated Training Curriculum		10/1/20	12/30/20	In Progress	Brandon Oss
	Below Plan	K112.WC2.	K112.WC2. Implement Printer Quotas	Reduce total paper/ink waste by limiting total pages printed for departments	12/1/20	1/30/20	In Progress	Zachary Muse

Reorder Columns Per Drag-and-Drop

Easily rearrange the columns in your views by simply dragging and dropping them into your preferred order. Your customized column layout will automatically save, ensuring your views remain consistent every time you access them. This allows views tailored exactly to your workflow preferences, without repetitive adjustments.



What's Next:

We're continuing to expand the summary list functionality with features like:

- Editing elements through point and click, just as in the Enter Performance Results functionality
- Streamlined bulk data updates via easy Excel imports
- Downloading numeric data for multiple periods at once

Need Assistance?

For any questions regarding these updates, please reach out to your ESM account manager or email clientsupport@esmgrp.com.

We appreciate your continued support and hope these improvements enhance your ESM experience.

Thank you!