



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

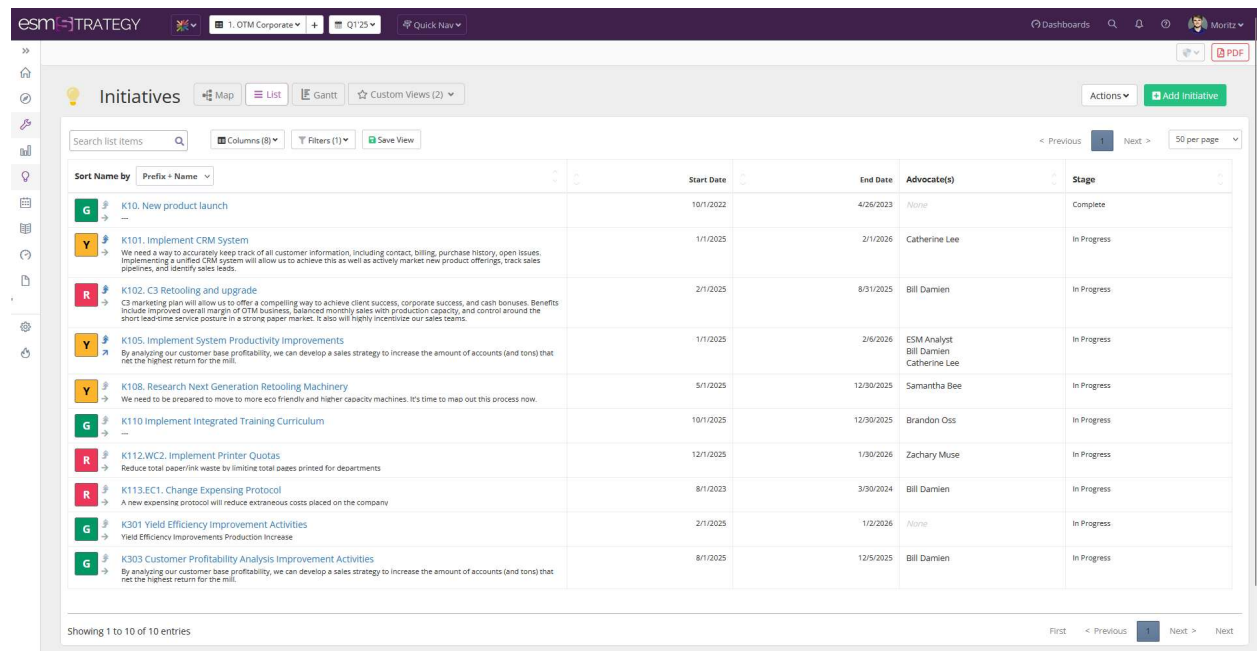
Release Overview (7/22/2025) – Summary List View Update

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.

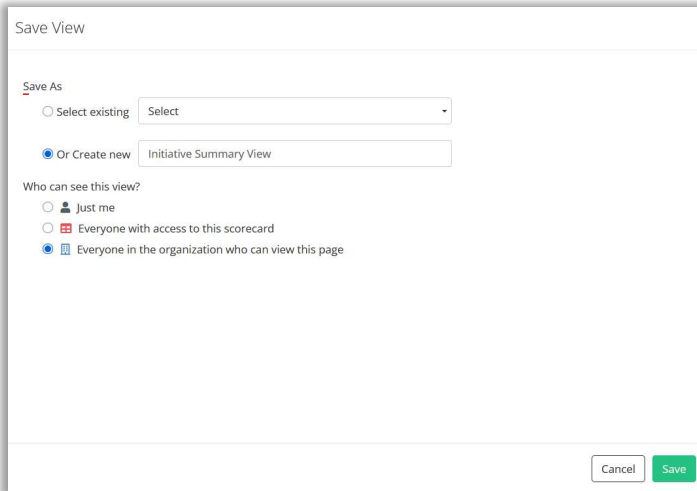


The screenshot displays the 'Initiatives' summary list view in ESM Software. The interface includes a top navigation bar with the ESM logo, user profile, and various settings. The main content area shows a table of initiatives with the following columns: Name, Start Date, End Date, Advocate(s), and Stage. The table is filtered to show 10 entries. The 'Columns' dropdown is open, showing the current column configuration: Name, Start Date, End Date, Advocate(s), and Stage. The 'Filters' dropdown is also open, showing the current filter configuration: Name, Start Date, End Date, Advocate(s), and Stage.

Sort Name by	Prefix + Name	Start Date	End Date	Advocate(s)	Stage
G	K10. New product launch	10/1/2022	4/26/2023	None	Complete
Y	K101. Implement CRM System	1/1/2025	2/1/2026	Catherine Lee	In Progress
R	K102. C3 Retooling and upgrade	2/1/2025	8/31/2025	Bill Damien	In Progress
Y	K105. Implement System Productivity Improvements	1/1/2025	2/6/2026	ESM Analyst Bill Damien Catherine Lee	In Progress
Y	K108. Research Next Generation Retooling Machinery	5/1/2025	12/30/2025	Samantha Bee	In Progress
G	K110 Implement Integrated Training Curriculum	10/1/2025	12/30/2025	Brandon Oss	In Progress
R	K112.WC2. Implement Printer Quotas	12/1/2025	1/30/2026	Zachary Muse	In Progress
R	K113.EC1. Change Expensing Protocol	8/1/2023	3/30/2024	Bill Damien	In Progress
G	K301 Yield Efficiency Improvement Activities	2/1/2025	1/2/2026	None	In Progress
G	K303 Customer Profitability Analysis Improvement Activities	8/1/2025	12/5/2025	Bill Damien	In Progress

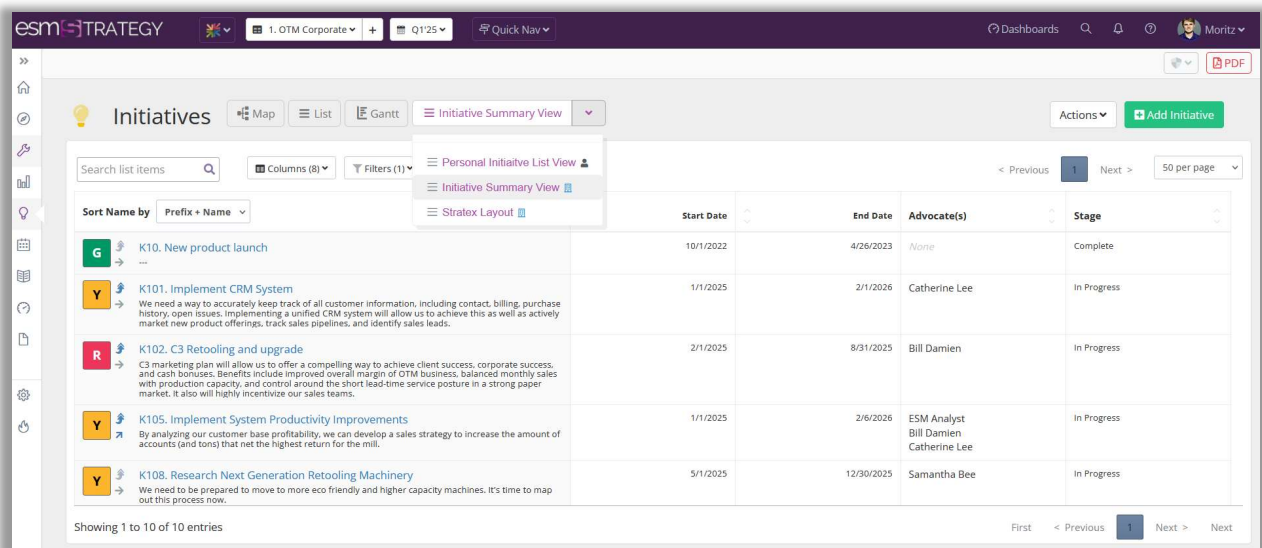
Easily Save and Access Configured Views

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.



The 'Save View' dialog box allows users to save their current view configuration. It includes a 'Save As' section with two options: 'Select existing' (with a dropdown menu) and 'Or Create new' (with a text input field containing 'Initiative Summary View'). Below this, the 'Who can see this view?' section offers three permissions: 'Just me', 'Everyone with access to this scorecard', and 'Everyone in the organization who can view this page' (which is selected). At the bottom right, there are 'Cancel' and 'Save' buttons.

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



The screenshot shows the ESM Strategy dashboard. The top navigation bar includes the ESM logo, user profile (Moritz), and various filters (1. OTM Corporate, Q1'25). The main content area is titled 'Initiatives' and features a dropdown menu for 'Initiative Summary View'. Below this, there's a search bar and a table of initiatives. The table has columns for 'Start Date', 'End Date', 'Advocate(s)', and 'Stage'. A dropdown menu is open over the table, showing options like 'Personal Initiative List View', 'Initiative Summary View', and 'Stratex Layout'. The table lists several initiatives, including 'K10. New product launch', 'K101. Implement CRM System', 'K102. C3 Retooling and upgrade', 'K105. Implement System Productivity Improvements', and 'K108. Research Next Generation Retooling Machinery'. The bottom of the dashboard shows 'Showing 1 to 10 of 10 entries' and pagination controls.

Initiative	Start Date	End Date	Advocate(s)	Stage
K10. New product launch	10/1/2022	4/26/2023	None	Complete
K101. Implement CRM System	1/1/2025	2/1/2026	Catherine Lee	In Progress
K102. C3 Retooling and upgrade	2/1/2025	8/31/2025	Bill Damien	In Progress
K105. Implement System Productivity Improvements	1/1/2025	2/6/2026	ESM Analyst Bill Damien Catherine Lee	In Progress
K108. Research Next Generation Retooling Machinery	5/1/2025	12/30/2025	Samantha Bee	In Progress

Reordered Manage Layouts and Set Defaults Functionality

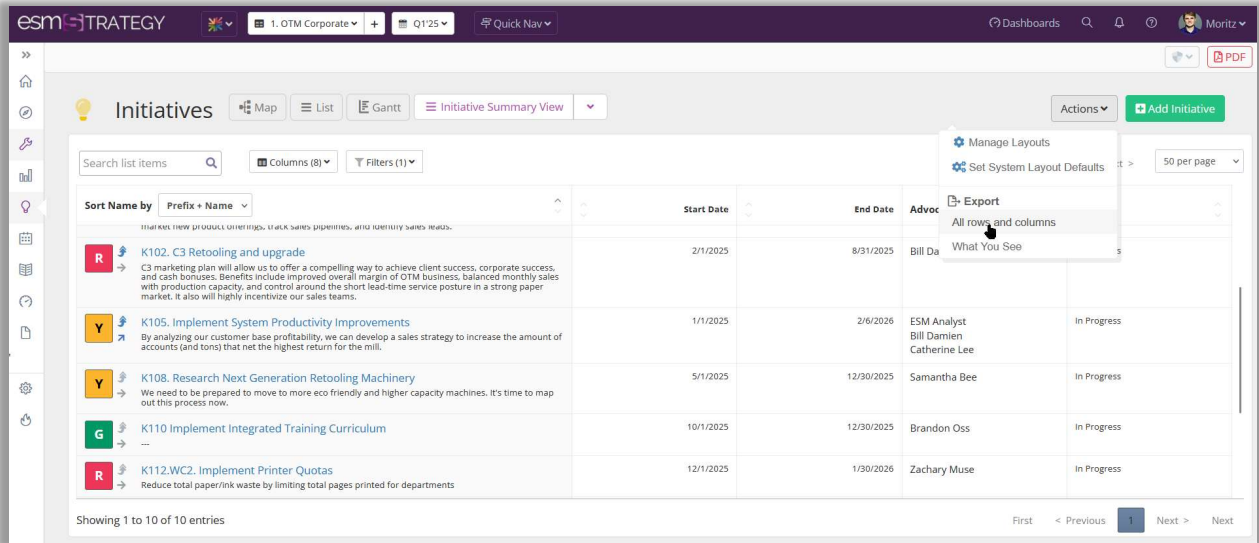
The "Manage Layouts" and "Set System Defaults" functionalities have been streamlined and moved into the Actions menu, simplifying your navigation and making it quicker to configure system settings.

The screenshot displays the ESM Strategy web application interface. The top navigation bar includes the ESM Strategy logo, a dropdown menu for '1. OTM Corporate', a dropdown for 'Q1/25', and a 'Quick Nav' button. The main header shows 'Dashboards', a search icon, a notification bell, and a user profile for 'Moritz'. The left sidebar contains various navigation icons. The main content area is titled 'Initiatives' and features a 'Map' button, a 'List' button, a 'Gantt' button, and an 'Initiative Summary View' dropdown. Below this is a search bar for 'Search list items', a 'Columns (8)' dropdown, and a 'Filters (1)' dropdown. The 'Initiatives' table lists several items, including 'K102. C3 Retooling and upgrade', 'K105. Implement System Productivity Improvements', 'K108. Research Next Generation Retooling Machinery', 'K110 Implement Integrated Training Curriculum', and 'K112.WC2. Implement Printer Quotas'. The 'Actions' menu is open, showing options: 'Manage Layouts', 'Set System Layout Defaults', 'Export', 'All rows and columns', and 'What You See'. The bottom of the page shows 'Showing 1 to 10 of 10 entries' and pagination controls.

Sort Name by	Prefix + Name	Start Date	End Date	Advoc
R	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.	2/1/2025	8/31/2025	Bill Da
Y	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.	1/1/2025	2/6/2026	ESM Analyst Bill Damien Catherine Lee
Y	K108. Research Next Generation Retooling Machinery → We need to be prepared to move to more eco friendly and higher capacity machines. It's time to map out this process now.	5/1/2025	12/30/2025	Samantha Bee
G	K110 Implement Integrated Training Curriculum →	10/1/2025	12/30/2025	Brandon Oss
R	K112.WC2. Implement Printer Quotas → Reduce total paper/ink waste by limiting total pages printed for departments	12/1/2025	1/30/2026	Zachary Muse

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.



The screenshot shows the ESM Strategy web application interface. The top navigation bar includes the ESM logo, user profile, and various navigation links. The main content area displays the 'Initiatives' list view. A dropdown menu is open over the 'Export' button, showing two options: 'All rows and columns' and 'What You See'. The list below shows several initiatives with columns for Status, Initiative Prefix, Initiative Name, Definition, Start Date, End Date, and Advocates.

Status	Initiative Prefix	Initiative Name	Definition	Start Date	End Date	Advocates
At or Above Target	K10.	K10. New product launch		10/1/20	4/26/20	Complete
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
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
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
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
At or Above Target	K110	K110 Implement Integrated Training Curriculum		10/1/20	12/30/20	In Progress
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

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

	A	B	C	D	E	F	G	H	I
1	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	
8	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.

The screenshot displays the ESM Strategy software interface. The top header shows the user 'Moritz' and the date '7/23/2025'. The main content area is titled 'Initiatives' and features a table with columns for 'Advocate', 'Start Date', 'End Date', and 'Stage'. A mouse cursor is shown dragging the 'Advocate' column header, indicating the drag-and-drop functionality for reordering columns.

Sort Name by	Prefix + Name	Advocate	Start Date	End Date	Stage
K102	C3 Retooling and upgrade	Bill Damien	2/1/2025	8/31/2025	In Progress
K105	Implement System Productivity Improvements	ESM Analyst Bill Damien Catherine Lee	1/1/2025	2/6/2026	In Progress
K108	Research Next Generation Retooling Machinery	Samantha Bee	5/1/2025	12/30/2025	In Progress
K110	Implement Integrated Training Curriculum	Brandon Oss	10/1/2025	12/30/2025	In Progress
K112.WC2	Implement Printer Quotas	Zachary Muse	12/1/2025	1/30/2026	In Progress

Showing 1 to 10 of 10 entries

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!