



Dashboard List Enhancement

Release Notes ESM 10.0.6

The latest update to the ESM suite brings major improvements to the Dashboard List experience. Users can now set static module heights for cleaner dashboards, reorder columns directly from the dashboard, use an enhanced column picker, aggregate numeric values, and administrators can delete elements directly from dashboard lists.

Release Overview

1. Pick a standard list height

Feature Summary:

You can now set a static height for any List module. When the content exceeds the chosen height, an **internal scrollbar** appears within the module, keeping the rest of the dashboard stable and in view.

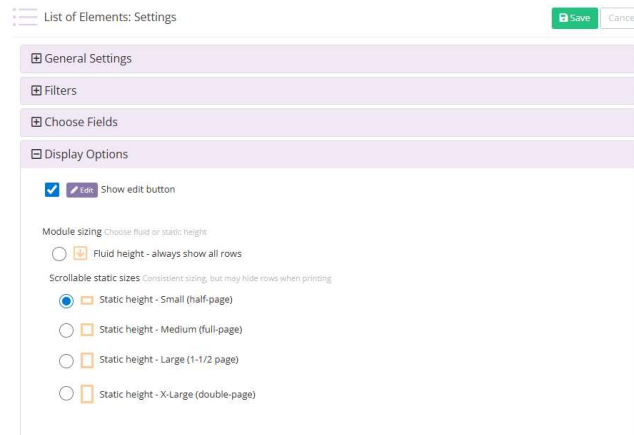


Figure 1: Choose a static module height

Benefits:

- Cleaner dashboards: Long lists no longer push critical charts and KPIs below the fold.
- Consistent layout: Keep rows aligned across modules so views stay predictable.
- Faster scanning: Users get an at-a-glance, stable canvas without constant scrolling

Tips and best practices:

- Use the fluid height module for lists you'd like to export and share as a PDF to ensure that all list elements appear in the report
- Use static height for lists with many elements to ensure easy navigation in the dashboard when online
- Avoid making modules too short, which can cause excessive nested scrolling

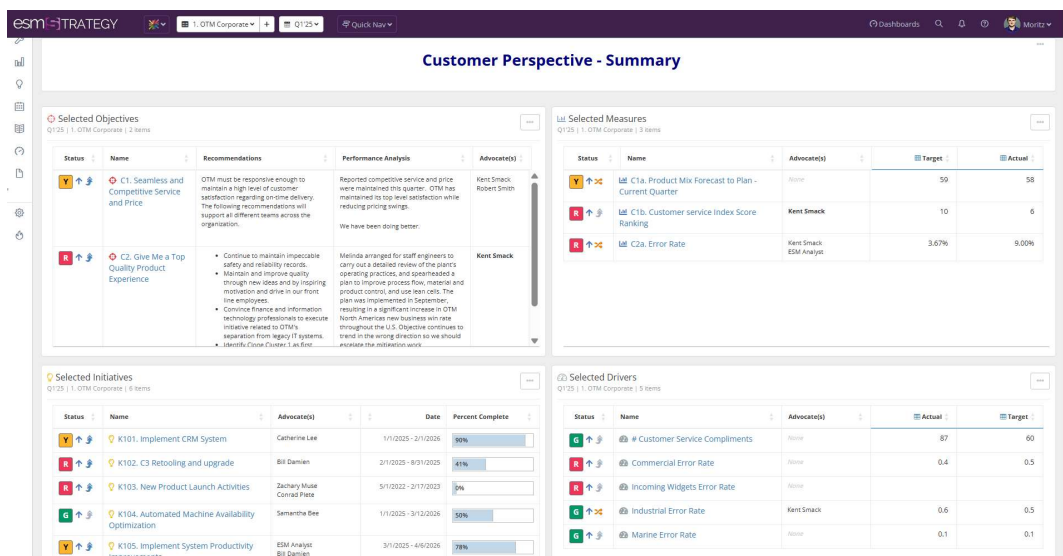


Figure 2: Static heights improve dashboard visuals

2. Custom Column ordering in Dashboard Lists

Feature Summary:

Reorder columns in the List module with simple drag-and-drop right on the dashboard.

Benefits

- Quickly adjust the view based on discussion topics or reporting needs
- Surface the most relevant fields without navigating away from the dashboard
- Customize list views for different stakeholder groups (executives, department leads, team users)

Selected Objectives
Q1'25 | 1. OTM Corporate | 2 Items

Status	Advocate(s)	N Advocate(s)	Recommendations	Performance Analysis
Y	Kent Smack Robert Smith	C1. Seamless and Competitive Service and Price	OTM must be responsive enough to maintain a high level of customer satisfaction regarding on-time delivery. The following recommendations will support all different teams across the organization.	Reported competitive service and price were maintained this quarter. OTM has maintained its top level satisfaction while reducing pricing swings. We have been doing better.
R	Kent Smack	C2. Give Me a Top Quality Product Experience	<ul style="list-style-type: none"> Continue to maintain impeccable safety and reliability records. Maintain and improve quality through new ideas and by inspiring motivation and drive in our front line employees. Convince finance and information technology professionals to execute initiative related to OTM's separation from legacy IT systems. Identify, Clone, Cluster 1 as first 	Melinda arranged for staff engineers to carry out a detailed review of the plant's operating practices, and spearheaded a plan to improve process flow, material and product control, and use lean cells. The plan was implemented in September, resulting in a significant increase in OTM North Americas new business win rate throughout the U.S. Objective continues to trend in the wrong direction so we should escalate the mitigation work.

Figure 3: Reorder columns via drag-and-drop

3. Enhanced Column Picker

Feature Summary:

The Column Picker has been redesigned for clarity and efficiency. This update improves efficiency when managing lists with many fields and ensures that the most relevant information is always accessible immediately.

How It Works:

- All available fields are categorized by type in the selector
- Users can choose between displaying all fields or common fields for streamlined views
- Selected columns appear on the right-hand panel, where they can be easily rearranged by dragging into the preferred order
- This enhancement allows users to tailor summary list views to their workflow needs

The screenshot displays the 'List of Elements: Settings' window. At the top right are 'Save' and 'Cancel' buttons. The interface is divided into several sections: 'General Settings', 'Filters', and 'Choose Fields'. The 'Choose Fields' section contains a search bar labeled 'Search name or description', a 'Show:' dropdown with 'All Fields' and 'Common Fields Only' options, and two lists of fields. The 'Definition Fields' list includes 'Name', 'Prefix' (checked), 'Definition', 'Advocate(s)' (checked), 'Frequency', 'Date - Start Date', 'Date - End Date', 'Date - Start + End Date', 'Stage', 'External Link', and 'Portfolio'. The 'Reporting Fields' list is partially visible at the bottom. To the right, the 'Selected Columns (7)' panel shows a vertical stack of selected fields: 'Status', 'Name' (containing 'Element Icon' and 'Prefix'), 'Advocate(s)', 'Recommendations', and 'Performance Analysis'. Each field has a drag handle and a close button. A 'Deselect All' link is at the top right of this panel. The bottom section is labeled 'Display Options'.

Figure 4: The updated column chooser interface

4. Aggregation of Numeric Datasheet Fields

Feature Summary:

Any numeric values can now be aggregated directly. This allows more insights into metrics and gives simple summaries without the need to export the list to a spreadsheet.

What's New:

- Calculate averages, sums, counts, minimum, or maximums on numeric fields

The screenshot shows the 'Initiatives' dashboard in ESM Software. The table displays various initiatives with aggregated numeric data. The columns include Status, Name, Actual, Target, Variance, End Date, and Start Date. The data is summarized for each initiative, showing totals for Actual, Target, and Variance.

Status	Name	Actual	Target	Variance	End Date	Start Date
		SUM 260,000	SUM 130,800	AVG 4525		
R	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. Advocate(s): Bill Damien	\$35,000	\$25,000	\$10,000	8/31/2025	2/1/2025
R	Implement Printer Quotas Reduce total paper/link waste by limiting total pages printed for departments Advocate(s): Zachary Muse	\$10,000	\$12,000	-\$2,000	1/30/2026	12/1/2025
R	Change Expensing Protocol A new expensing protocol will reduce extraneous costs placed on the company Advocate(s): Bill Damien	30000		2000	3/30/2024	8/1/2023
Y	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. Advocate(s): Catherine Lee	2,000,000%	400,000%	1,600,000%	2/1/2026	1/1/2025
Y	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. Advocate(s): ESM Analyst, Bill Damien, Catherine Lee	\$45,000	\$55,000	\$10,000	2/6/2026	1/1/2025
Y	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. Advocate(s): Samantha Bee	\$15,000	\$14,800	\$200	12/30/2025	5/1/2025
G	Implement Integrated Training Curriculum	\$25,000	\$20,000	\$5,000	12/30/2025	10/1/2025

Figure 5: Aggregated numeric fields displayed within an element summary list

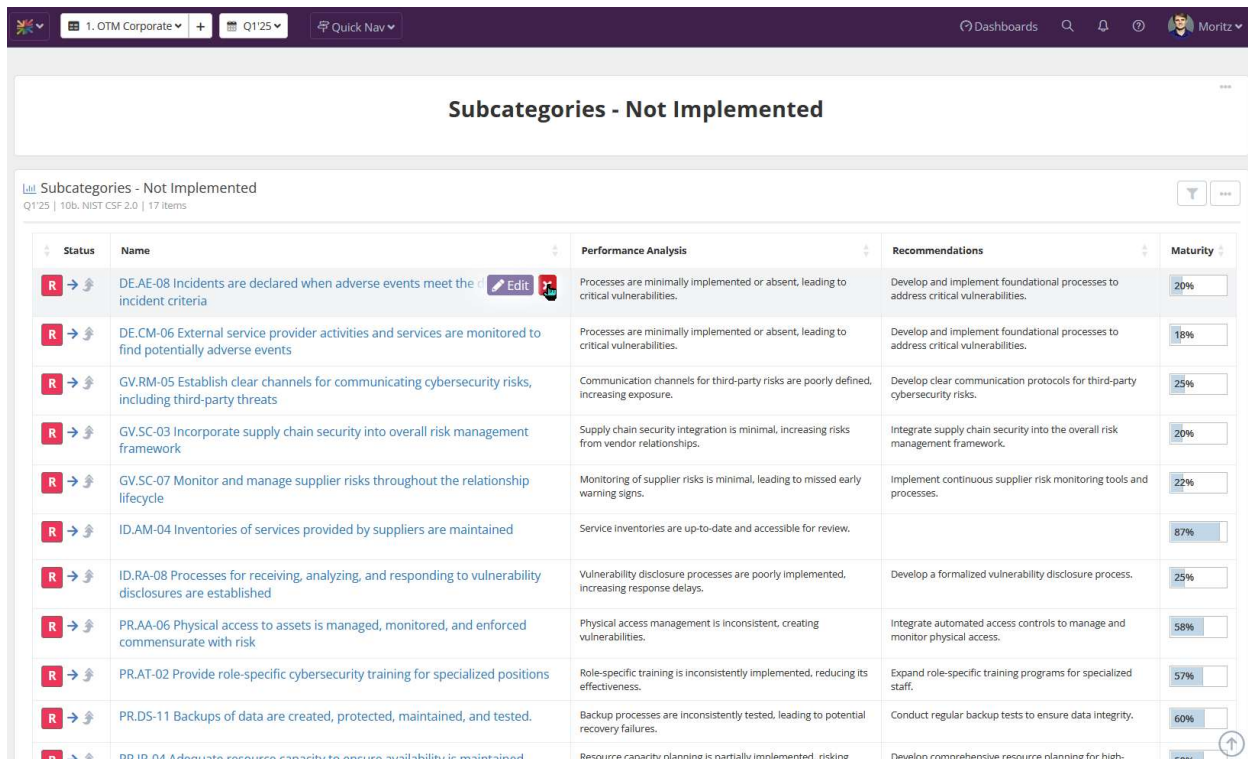
5. Delete Elements through from the Dashboard list functionality

Feature Summary

Administrators can now delete elements directly from dashboard list modules. This enables quick cleanup and management without navigating to other pages.

Details

- Delete functionality respects existing permissions
- Organizations can disable this feature by hiding the edit button
- Ideal for streamlining cleanup tasks or correcting mistakes in real time



The screenshot shows a dashboard titled "Subcategories - Not Implemented" with a table listing various security subcategories. Each row includes a status icon (red square with 'R'), a name, a performance analysis, a recommendation, and a maturity percentage. A delete icon (trash can) is visible next to each row's name, indicating the new delete functionality.

Status	Name	Performance Analysis	Recommendations	Maturity
R	DE.AE-08 Incidents are declared when adverse events meet the incident criteria	Processes are minimally implemented or absent, leading to critical vulnerabilities.	Develop and implement foundational processes to address critical vulnerabilities.	20%
R	DE.CM-06 External service provider activities and services are monitored to find potentially adverse events	Processes are minimally implemented or absent, leading to critical vulnerabilities.	Develop and implement foundational processes to address critical vulnerabilities.	18%
R	GV.RM-05 Establish clear channels for communicating cybersecurity risks, including third-party threats	Communication channels for third-party risks are poorly defined, increasing exposure.	Develop clear communication protocols for third-party cybersecurity risks.	25%
R	GV.SC-03 Incorporate supply chain security into overall risk management framework	Supply chain security integration is minimal, increasing risks from vendor relationships.	Integrate supply chain security into the overall risk management framework.	20%
R	GV.SC-07 Monitor and manage supplier risks throughout the relationship lifecycle	Monitoring of supplier risks is minimal, leading to missed early warning signs.	Implement continuous supplier risk monitoring tools and processes.	22%
R	ID.AM-04 Inventories of services provided by suppliers are maintained	Service inventories are up-to-date and accessible for review.		67%
R	ID.RA-08 Processes for receiving, analyzing, and responding to vulnerability disclosures are established	Vulnerability disclosure processes are poorly implemented, increasing response delays.	Develop a formalized vulnerability disclosure process.	25%
R	PR.AA-06 Physical access to assets is managed, monitored, and enforced commensurate with risk	Physical access management is inconsistent, creating vulnerabilities.	Integrate automated access controls to manage and monitor physical access.	58%
R	PR.AT-02 Provide role-specific cybersecurity training for specialized positions	Role-specific training is inconsistently implemented, reducing its effectiveness.	Expand role-specific training programs for specialized staff.	57%
R	PR.DS-11 Backups of data are created, protected, maintained, and tested.	Backup processes are inconsistently tested, leading to potential recovery failures.	Conduct regular backup tests to ensure data integrity.	60%
R	PR.IR-04 Adequate resource capacity to ensure availability is maintained	Resource capacity planning is partially implemented, risking	Develop comprehensive resource planning for high-	60%

Figure 6 Delete Elements right from the dashboard

Need Assistance?

For any questions regarding these updates, please reach out to your ESM account manager.

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

Thank you!