

Release Notes ESM 9.7

ESM+Strategy

Release 9.7.2 (05-APR-2024) Overview

We're happy to share that we just released more user interface and functionality improvements to the ESM product suite.

The core functionality improvements in this release relate to an overhaul of the functionality that drives Auto Status Indicator setting using Thresholds. In ESM, Thresholds are used to automatically set Status Indicators (for measures, initiatives, KPIs) based on values in Datasheets. (Traditionally the Target and Actual fields.)

This latest release includes the following Improvements to the Threshold functionality:

Manage Thresholds in Bulk – the latest changes put the Threshold Set at the forefront, enabling Strategy Administrators to easily create a Threshold set and apply it to multiple elements across element types and scorecards in one centralized interface.

| Manage TI | nresholds in Bulk Organization: A01. OTM Primary Demo | | | |
|-------------|--|-------------|--------------------------|---|
| View By Sco | recard: 1. OTM Corporate - | | | C Add Threshold |
| Advocate(s) | | | | |
| | Threshold Name | Field Type | Thumbnail | Usable on Scorecards |
| × | 1. OTM Corporate - Aggressive Threshold Set For Strategy elements | Percent (%) | 1 00 4 934 | S Strategy Scorecards (2 assigned) 1.0TM Corporate (2 assigned) 3.0TM Europe Risk Management (0 assigned) 4.0TM Europe Risk Management (0 assigned) 5.0TM Americas (0 assigned) 18.8U Function (0 (0 assigned)) |

Ability to easily add a new Threshold Set and **apply it to both percentages** as well as **numeric values**,

| 1. OTM Corporate - Aggressive Thresho | old Set | | | |
|--|------------------------|--|--------------------------------|-----------|
| hreshold Description | | | | |
| Add a description or describe how this | threshold set should | be used | | |
| | | | | |
| hoose the set of indicators to use | | Choose Scorecard(s) that can u | se this Threshold | l Set |
| Strategy Indicators | - | 5 selected | | |
| What type of data do you want to apply t tup Status Indicator Ranges | this threshold set to? | Percent • with 0 | Decimal(s) | |
| | | Percent • with 0 | | ercent (% |
| tup Status Indicator Ranges | Select | | Pe | ercent (% |
| tup Status Indicator Ranges Available Threshold Status | Selection Selection | ed Threshold Status | Pe | ercent (% |
| tup Status Indicator Ranges Available Threshold Status | Selectr | ed Threshold Status At or Above Target | Pe | ercent (% |
| tup Status Indicator Ranges Available Threshold Status G At or Above Target Y Caution | Selectr | ed Threshold Status At or Above Target Caution | Pe | ercent (% |

Apply a Threshold to any Series in a

Datasheet – you will now be able to apply a Threshold to any series in a datasheet, including both percent and numeric data types as well as calculated fields that use formulas. Prior versions of ESM supported only the Target vs. Actual calculation, which was good, but somewhat limiting.

| Setup AutoSI using thresh | nolds for F1a. EBITDA | | ď |
|--|--|--------------------|------|
| Choose the datasheet field to app Threshold Value [Percent] | oly a threshold set to | | • |
| Ch O Target (Numeric) Actual (Numeric) Porecast (Numeric) Variance (Numeric) S Variance (Percent) Cumulative (Numeric) Threshold Value (Percent) | tosen datasheet field id Set (Percent)(Lassigned) ·Q1/24 will be set to: | 995 542 • | |
| | _ | ¥88 548 | |
| | | Close Save & Close | Save |

This interface also provides transparency by making it easy for users to **preview the value** of the Series (Target vs. Actual calculation for example) **that drives the final status color** that is set for that element **prior to applying the threshold set** to the chosen data series.

| etup AutoSI using thresholds for F1a. EBITDA | |
|---|-----------------------|
| Choose the datasheet field to apply a threshold set to | |
| Threshold Value [Percent] | |
| Choose a threshold set to apply to the chosen datasheet field | |
| 1. OTM Corporate - Restricted Threshold Set [Percent] (1 assigned) | 98%5 4% |
| Status Indicator Preview Pane Using this threshold set, the Status for Q1'24 will be set to: | 6 10000 98% 54% |
| | |
| | |
| | |
| | |
| | |

3/25/2024

Detail Page Improvement -

For all elements that use Thresholds to auto calculate the Status Indicator value, the Reporting Tab will now have a new visual to the right of the Status Indicator. This will display the full Threshold Set, the Value for chosen field upon which the Threshold set is applied, as well as the associated Status Color.

| esmistrategy 💥 - | ØStrategy v | Q, D 🎯 ESM - Chris v |
|---|---|----------------------------------|
| < Non-production data | F1a. EBITDA Periodi 01/24 | Pefault > Actions > /Edit. @ 0 2 |
| □ 1. 01M Corporate < 目 Q124 く | C a k Reporting Measure Data Charts Definition Reminders Q Sature Data Charts Definition Reminders Charts Copy forward O Status Indicator Setup | tTE ↔ ns ns Senio |
| My ESM < Ø Strategy Formulation < Ø⁺ BSC Design < | DEFINITIO | to \$1.8M or less. |
| Coc cocy Instactive Management Cocy Documents and Reports Cocy Scorecard Admin Cocy | Image: Second secon | this point in time. |
| Strategy Admin < È ESM Admin | 100 | , v |
| Help & Resources | 25 | |
| esm+perform o esm+cyber o | B I | Co Add Action Rem Advocate(s) |
| | Close Save & Close & Close Save & Close & | re Nore Edit |

Existing thresholds with an actual/target comparison are maintained by adding a new series into the data sheet. A new series called 'Threshold Value (ESM)' was created for all thresholds set up in the old interface. The series calculates Actual/Target and ensures thresholds continue to work with the new threshold functionality.

| | ۲ | | F26, 0 | oross Margin p | per Tori Period: Q1/24 | | | | C Actions ~ / Rill 0 0 |
|------------|----------|---------|--|----------------------|------------------------|----------------------|-------------------|------------------------|--|
| | 3 | - | | | | | | | |
| | 4 | G | Repo | orting Measure | Data Charts I | Definition Reminders | 4 8 | • | 1 |
| | | | \$ E | xport Data 🗸 | Import Data | fff Mana | ige Sheets 🗪 | • Setup Measure Data ~ | |
| | <u> </u> | | Viewd | lata by: Month, Qua | arter and Year End | - 0 | Column width: @ F | Eved O Auto | |
| | ×. | DEFINI | VIC.VV G | ioto by. mornin, qui | | | | - | |
| | 2 | | | Period | Forecast | Variance | % Variance | Threshold Value (ESM) | |
| | <u> </u> | Optimiz | m | FY'25 | 860.05 | 10.00 | 1.2 | | |
| | - K - | | m | Q4'25 | 859.02 | 1671.00 | 202.5 | 1735783 | |
| | | | m | Dec'25 | 857.99 | 8.0 | 1.0 | | |
| | s < | - | □ | Nov'25 | 856.96 | 7.00 | 0.8 | 101% | |
| | 1 | MEASU | E E | Oct 25 | 855.93 | 6.00 | 0.7 | | |
| | | | m | Q3'25 Sep'25 | 853.87 | 4.00 | 0.5 | 1.122 | |
| | - 8 | 9000 | m | Sep 25 Aug 25 | 853.87 | 4.00 | 0.5 | 100% | atly above target. |
| | 2 | | ₩ | Aug 25 Jul'25 | 851.81 | 2.00 | 0.4 | | |
| | | 2500 | in the second se | 02'25 | 850.78 | 1647.00 | 199.6 | | |
| | - S - | 2000 | m | Jun'25 | 849,75 | 0.00 | 0.0 | | |
| | | 2000 | | May'25 | 848.72 | -1.00 | -0.1 | | |
| | _ | 1500 | £ | Apr'25 | 847.69 | -2.00 | -0.2 | | initiatives enabled us to increase prices by all for continued success in our competitive |
| | 0 | 1000 | m | 01'25 | 846.66 | 1660.00 | 207.5 | | * |
| sm perform | .0 | 1000 | | (strain) | | | | | |
| sm+cyber | | | | | | | Clo | ose Save & Close S | ave |

Release 9.7.1 (22-MAR-2024) Overview

The latest release of the ESM suite has numerous advancements designed to improve the usability of the application and your overall experience. The following enhancements were included in this release:

1) **User Profile** – updates to make it easier for users to manage personal settings in one centralized location, including your user profile, default settings, password, and two-factor (2FA) authentication.

| sm+strategy 💥 🛛 👳 | Objectives 🗸 🛯 🗤 🛛 🗤 Objectives 🗸 | ♀ Initiatives ∽ | Action Items ~ | 🗅 Themes 🗸 | | Q 🐠 | 🦉 Moritz ~ |
|--|--|-----------------|----------------|------------------------|-------------------------|---|------------|
| My Profile | | | | Moritz M A01. OTM P | larchart rimary Demo | | |
| User Profile Default Settings | Security | | | Vour widge | TM tz=Ontime | My Profile Switch Account Bookmarks Subscriptions | |
| | First Name Moritz Middle Name | | | | | e ^ρ Logout | |
| Change | Last Name Marchart | | | | | | |
| Remove | Email Address Moritz.marchart@gmail.com | m | | | | | |
| //www.esmsuite.com/sas/index.cfm?s=10006&a=t2JwZm0HTq0YbVB | Role | | | | | | |

Picture 1: In 'My Profile' easily change account settings and security

2) **Manage Layouts** – we simplified the process to manage and configure both Summary Pages as well as Detail Pages across element types throughout the system.



Picture 2: Access the new functionality through the Layout Dropdown in a Summary or Detail Page

The new functionality includes:

• A simplified and standardized UI to Manage Layouts (Personal, Scorecard and Organizational Layouts) in Summary and Detail pages

| Name | | Scope | |
|---|--------------|---------------------|---|
| ESM Default | | ESM Default Layout | ж |
| Category Layout | | Organization Layout | |
| Demo Layout | | Organization Layout | × |
| Print Layout | | Organization Layout | × |
| Simple View | | Organization Layout | × |
| Objective page | | Scorecard Layout | × |
| PeopleScore View | | Scorecard Layout | × |
| Print Layout | | E Scorecard Layout | × |
| Risk Layout | | E Scorecard Layout | × |
| et my default layouts et default for web browsers et default for custom reports | I SM Default | • | |

Picture 3: Quickly manage Layouts for Summary Pages, Detail Pages, and Reports

• Improvements in the approach to Summary Page configuration



Picture 4: A simpler way of managing the Map and List view of Summary Pages

• Improvements in the List view on Summary Pages to include a Quick Search utility, enhanced paging and other general improvements

| Ap View List View Measure Hierarchy Measure Target vs. Acto | al Report H | lelp | | | | | | | | |
|---|----------------------------|------|-------------|---|-------------|---|--|---|-------------------------|--------------|
| | | | | | | | | | | Hide List Fi |
| F2 Q | | | | | | | | < Previous | 1 Next > | 50 per page |
| Sort Name by Prefix + Name ~ | Advocate(s | a) 0 | Actual | ¢ | Target | 0 | Performance Analysis | Recommendations | | |
| Y 🖇 F2a. Total Initiative Spend | Bill Damien Samantha Bi | 5C | \$1,362,000 | | \$1,357,000 | | Our contribution margin per hour is way up and slightly exceeds the target. However, we need to be careful that spending does not get out of hand. | Focus on team developm investment. | ent to increase efficie | ncy of our |
| G ^{XC} → F2b. Gross Margin per Ton | Robert Smith | | \$2,409 | | \$2,400 | | We're on track with our goals, performing slightly above target. | Keep our initiatives for d enabled us to increase pi years and are crucial for market. | ices by over 30% over | the last two |

Picture 5: The improved list view showcasing the Quick Search

• Simplification of the Detail Page module chooser when adding modules to your custom Detail Page Layout(s)

| eneral Modules | |
|------------------------------|---------------------------|
| Advocate(s) | Attachments |
| Choose a Field to Display | Element Update Summary |
| Measure Details | All Measure Map/BSC Slice |
| Questions | |
| Action Items | Drivers |
| Action Items | Drivers |
| Initiatives | dil Measures |
| | Related OKRs |
| Objectives | |
| Objectives etrics and Charts | |

Picture 6: The improved modules overview

• Ability for Administrators to set Default Layouts across element types.

| t defaults for scorecard 1. OTM | Corporate 🕜 | |
|-----------------------------------|-------------------------------------|---|
| Default layout for web browsers | I. OTM Corporate - PeopleScore View | • |
| Default layout for custom reports | I. OTM Corporate - Print Layout | |
| t defaults for A01. OTM Primary | Demo 🚱 | |
| Default layout for web browsers | Let the system decide | • |
| | Let the system decide | |

Picture 7: Administrative Default Layout function

3) Advance Period Popup for Strategy Administrators – this utility presents a reminder on login to administrators to advance the default period when appropriate.

4) **Ability to Lock Series in Datasheets** so they are not editable - the lock series function is available in the column on the right in the Manage Sheets view to prevent any unauthorized data changes

| e Variance Numeric (unformatted) 2 Image: Construction of the second of the sec | | Series/Column | Hide Type | Data Format | Decimals | Calculated? | Auto Rollup Periods | Aggregation Type | - | Sheets (1) 🛛 |
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Picture 8: Lock Series by clicking the checkbox on the right.

| | | _ | | | |
|-----------|----------------------------|-------------------|-----------------------------|--------------------------|----------------|
| Rep | oorting Measure Data | Charts Definition | Reminders 🔍 | S 🖬 🗘 | |
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| | | | | | |
| | | | | Load from E | xternal Source |
| liouv | data by: Month, Quarter ar | - d Veen Feed | T 🕜 Colur | nn width: • Fixed • Auto | |
| ICVV | data by. Month, Quarter an | id Year End | Column width. Children Auto | | |
| | Period | Target | Actual | Forecast | Variance 📤 |
| ** | FY'25 | \$291.50 | \$227.00 | 184.33 | |
| ** | Q4'25 | \$37.00 | \$33.00 | 37.00 | |
| ** | Dec'25 | \$13.00 | \$12.00 | 13.00 | |
| m | Nov'25 | \$10.00 | \$11.00 | 10.00 | |
| ** | Oct'25 | \$14.00 | \$10.00 | 14.00 | |
| m | Q3'25 | \$39.00 | \$38.00 | 41.00 | |
| ** | Sep'25 | \$12.00 | \$13.00 | 14.00 | |
| ** | Aug'25 | \$13.00 | \$13.00 | 13.00 | |
| 1 | Jul'25 | \$14.00 | \$12.00 | 14.00 | |
| ** | Q2'25 | \$91.50 | \$76.00 | 54.33 | |
| 1 | Jun'25 | \$67.50 | \$55.00 | 30.33 | |
| 1 | May'25 | \$10.00 | \$11.00 | 10.00 | |
| 1 | Apr'25 | \$14.00 | \$10.00 | 14.00 | |
| ** | 01'25 | \$124.00 | \$80.00 | 52.00 | |

Picture 9: Locked Series are highlighted yellow in the Data Table and cannot be edited.

Feel free to reach out to your ESM account manager if you have any questions. We hope you like the changes.

Thanks!