



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.)

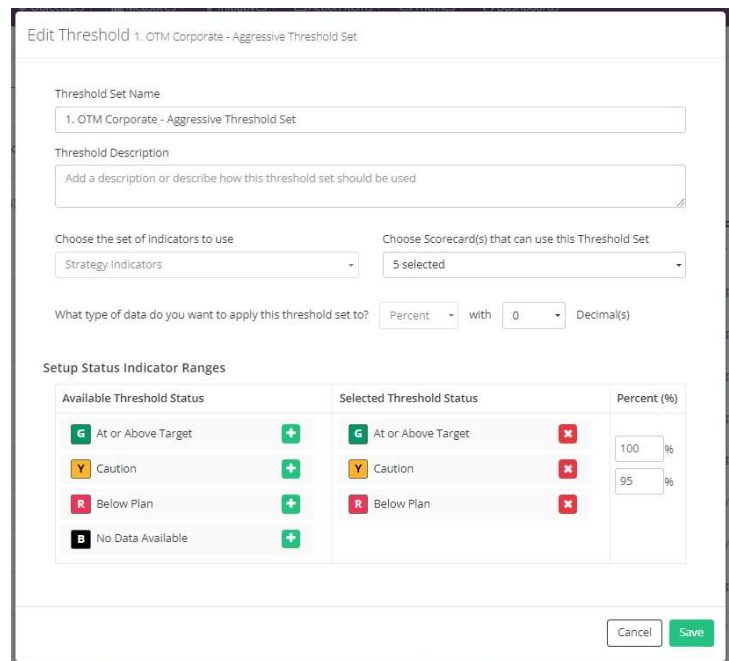
This latest release includes the following Improvements to the Threshold functionality:

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.



Advocate(s)	Threshold Name	Field Type	Thumbnail	Usable on Scorecards
<input checked="" type="checkbox"/>	1. OTM Corporate - Aggressive Threshold Set For Strategy elements	Percent (%)		5 Strategy Scorecards (2 assigned) 1. OTM Corporate (2 assigned) 3. OTM Europe (0 assigned) 4. OTM Europe Risk Management (0 assigned) 5. OTM Americas (0 assigned) 18. BU Function 1 (0 assigned)

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



Threshold Set Name: 1. OTM Corporate - Aggressive Threshold Set

Threshold Description: Add a description or describe how this threshold set should be used

Choose the set of indicators to use: Strategy Indicators

Choose Scorecard(s) that can use this Threshold Set: 5 selected

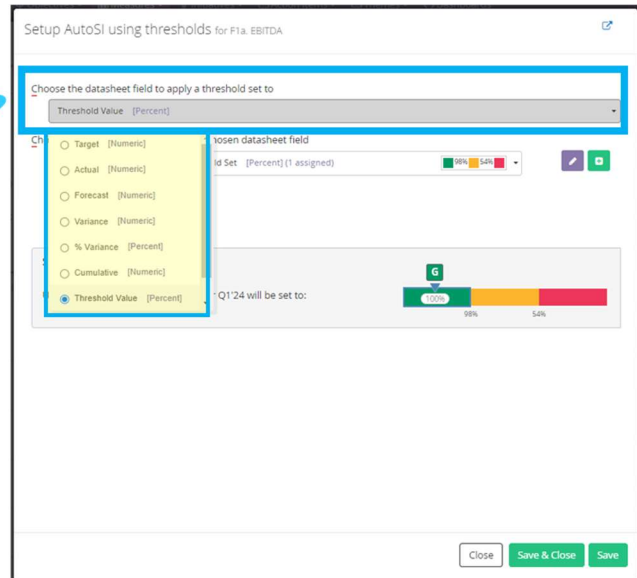
What type of data do you want to apply this threshold set to? Percent with 0 Decimal(s)

Setup Status Indicator Ranges

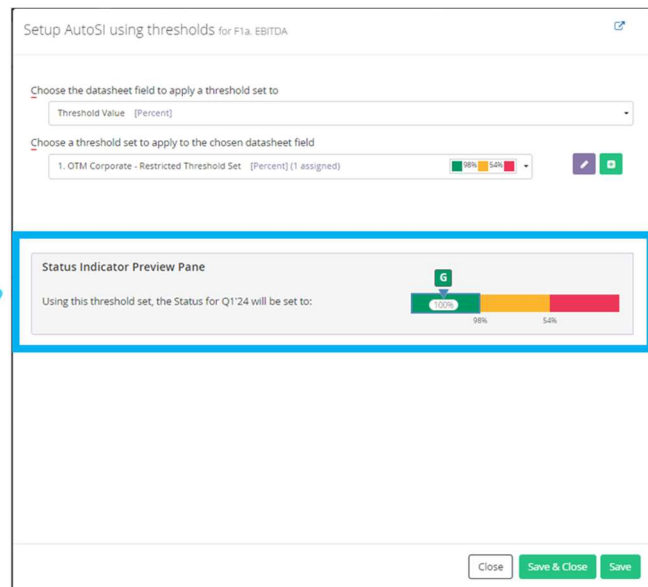
Available Threshold Status	Selected Threshold Status	Percent (%)
<input checked="" type="checkbox"/> At or Above Target (G)	<input checked="" type="checkbox"/> At or Above Target (G)	100 %
<input checked="" type="checkbox"/> Caution (Y)	<input checked="" type="checkbox"/> Caution (Y)	95 %
<input checked="" type="checkbox"/> Below Plan (R)	<input checked="" type="checkbox"/> Below Plan (R)	
<input checked="" type="checkbox"/> No Data Available (B)		

Buttons: Cancel, Save

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.

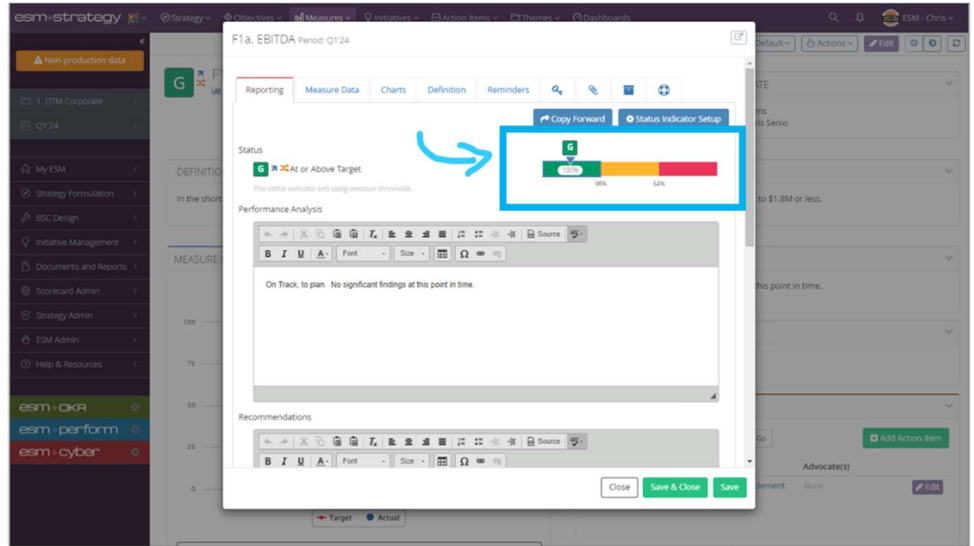


This interface also provides transparency by making it easy for users to **preview the value** of the Series (Target vs. Actual calculation for example) **that drives the final status color** that is set for that element **prior to applying the threshold set** to the chosen data series.

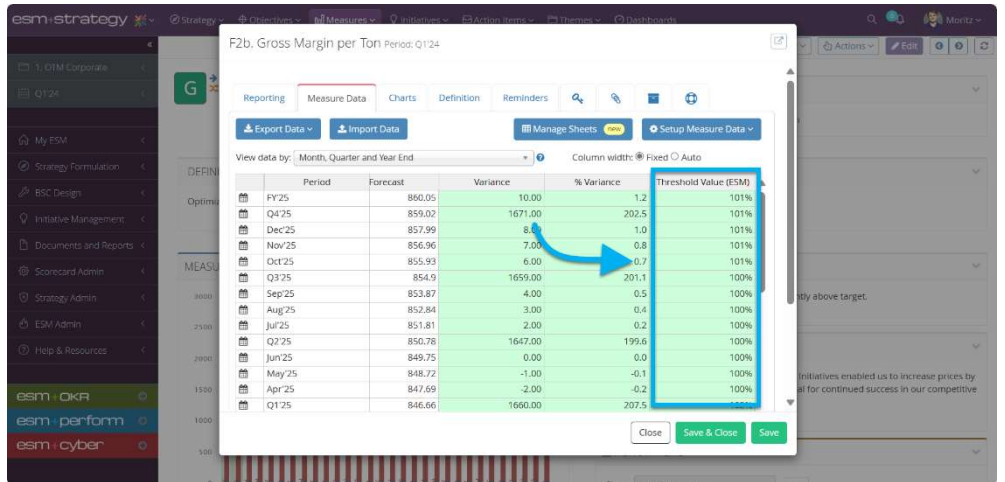


Detail Page Improvement -

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.



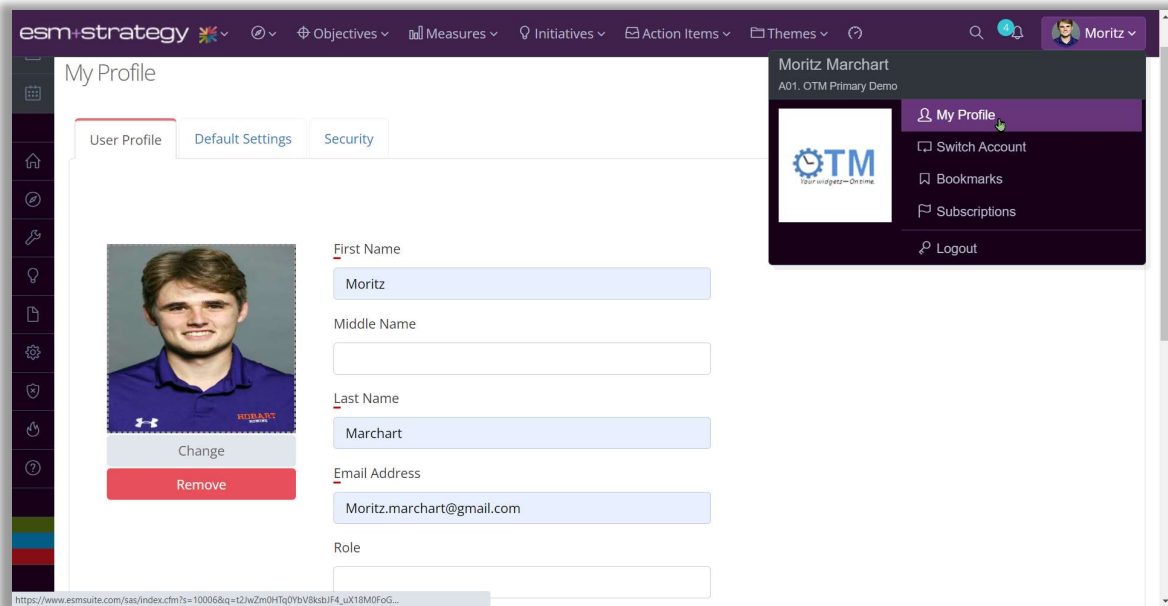
Existing thresholds with an actual/target comparison are maintained by adding a new series into the data sheet. A new series called 'Threshold Value (ESM)' was created for all thresholds set up in the old interface. The series calculates Actual/Target and ensures thresholds continue to work with the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



Release 9.7.1 (22-MAR-2024) Overview

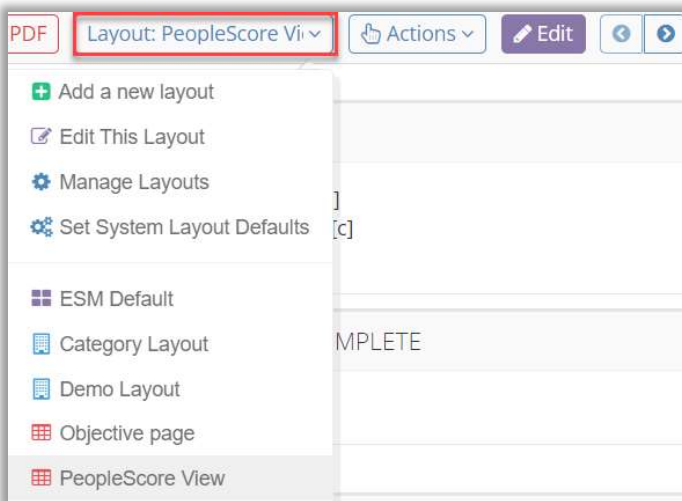
The latest release of the ESM suite has numerous advancements designed to improve the usability of the application and your overall experience. The following enhancements were included in this release:

- 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.



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

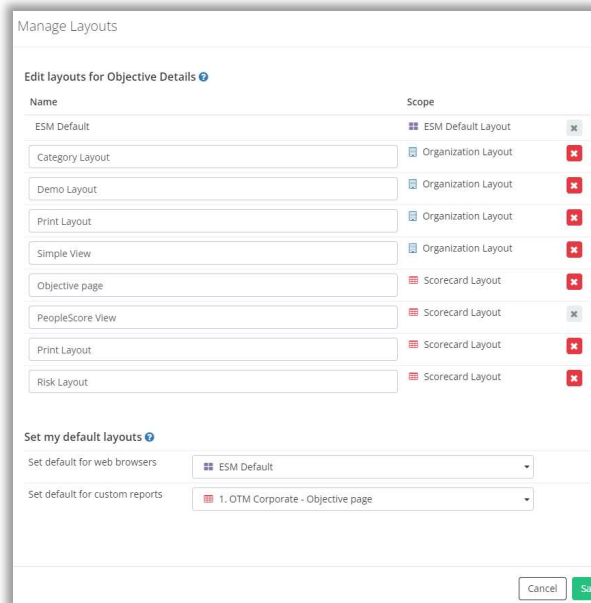
- 2) **Manage Layouts** – we simplified the process to manage and configure both Summary Pages as well as Detail Pages across element types throughout the system.



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

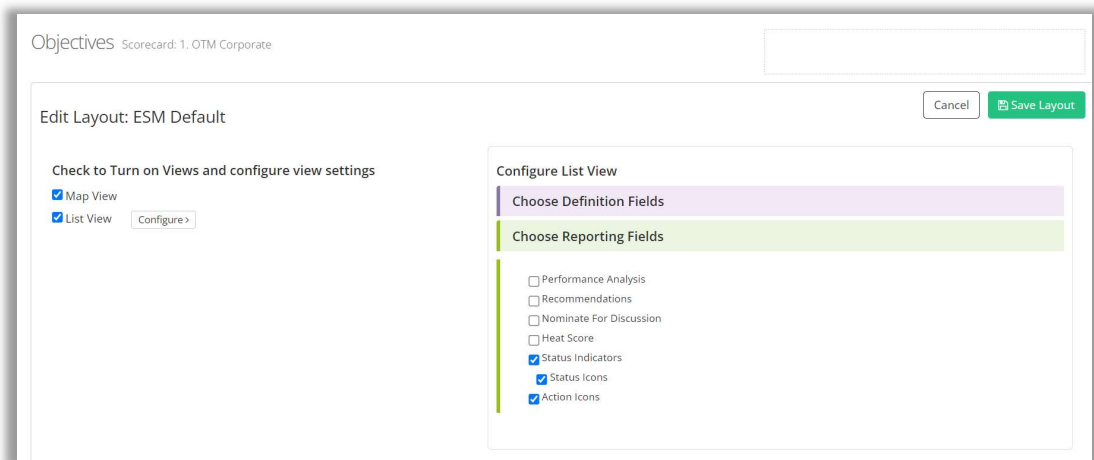
The new functionality includes:

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



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

Measures: Actual, Target, Performance Analysis, and Recommendations Layout Scorecard: 1. OTM Corporate

Map View List View Measure Hierarchy Measure Target vs. Actual Report Help

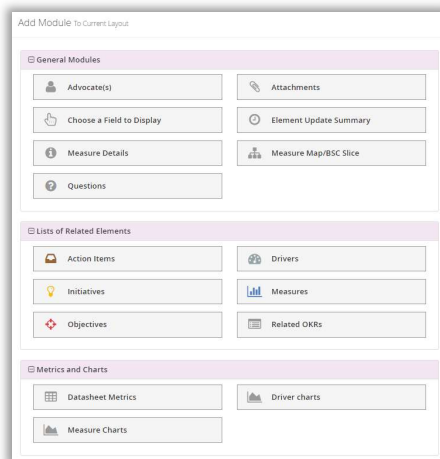
F2

Sort Name by	Prefix + Name	Advocate(s)	Actual	Target	Performance Analysis	Recommendations
Y	F2a. Total Initiative Spend	Bill Damien Samantha Bee	\$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 development to increase efficiency of our investment.
G	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 differentiation up. The Initiatives enabled us to increase prices by over 20% over the last two years and are crucial for continued success in our competitive market.

Showing 1 to 2 of 2 entries (filtered from 32 total entries)

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)



Picture 6: The improved modules overview

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

System Layout Defaults for Objective Details

Set defaults for scorecard 1. OTM Corporate

- Default layout for web browsers: 1. OTM Corporate - PeopleScore View
- Default layout for custom reports: 1. OTM Corporate - Print Layout

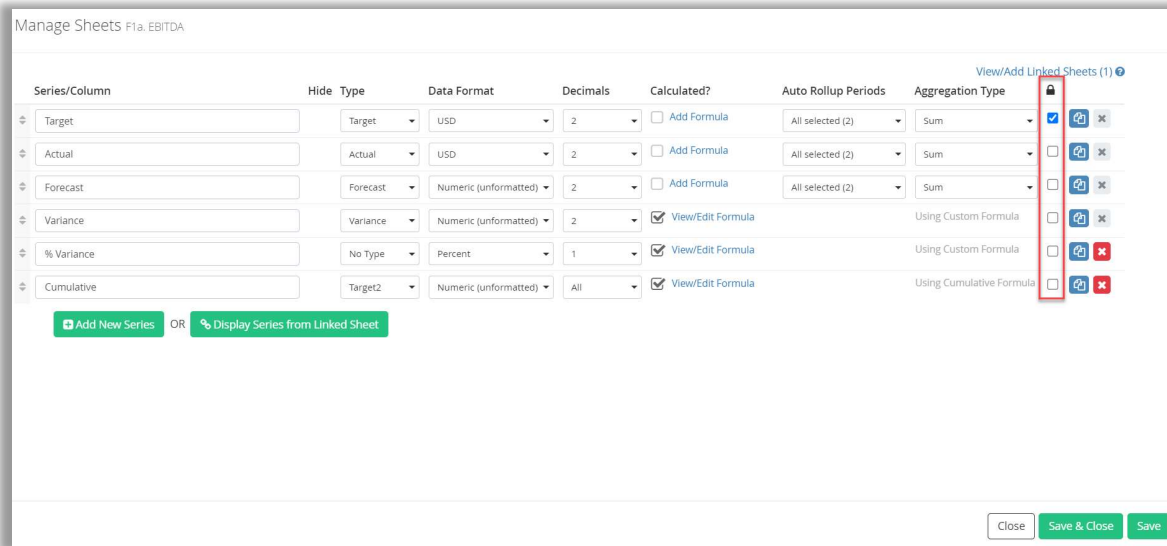
Set defaults for A01. OTM Primary Demo

- Default layout for web browsers: Let the system decide
- Default layout for custom reports: Let the system decide

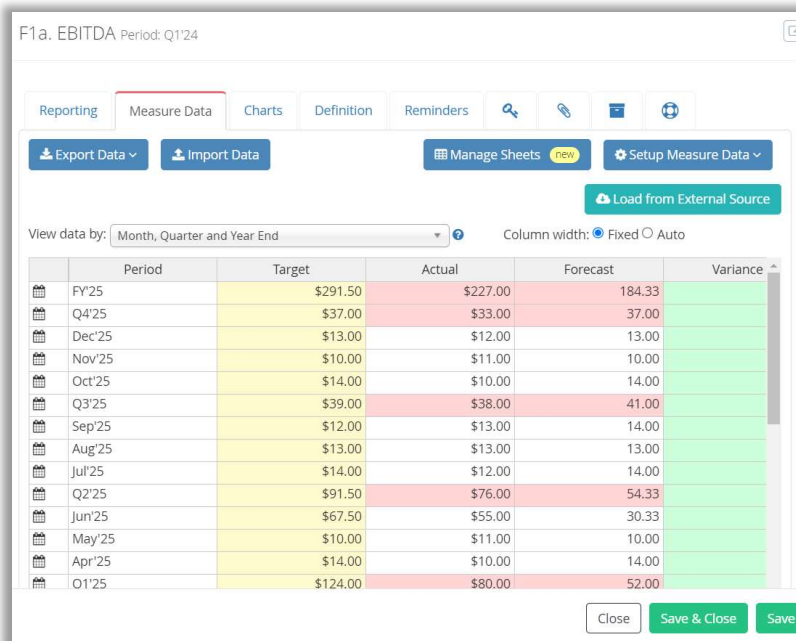
Picture 7: Administrative Default Layout function

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



Picture 8: Lock Series by clicking the checkbox on the right.



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!