

Release Notes ESM 9.7.4

The latest release of the ESM suite has numerous advancements designed to improve the usability of the application and your overall experience. This release improves user management functionality for Scorecard and Strategy Administrators. The following interfaces were enhanced as part of this release:

- 1) Manage Users
- 2) Manage Scorecard Access
- 3) User Roles
- 4) User Roles Nomenclature
- 5) Manage Element Owners/Advocates

1) **Manage Users** – We updated the functionality to make it easier to view the userswithin your organization and quickly view their access levels across scorecards.

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Documents and Report	is <	ID Osername	First Name	Last Name		Notes	
Scorecard Admin		21119 BillD@esmgrp.com	Bill	Damien	1. OTM Corporate Editor		🖉 🔀
		3132 BOss@esmgrp.com	Brandon	Oss	1. OTM Corporate Scorecard Manager		🖉 🔀
🕄 Strategy Admin	<	78 clee@otmwidgets.com	Catherine	Lee	1. OTM Corporate [Limited Reporter (0)]		🖉 🔀
		77492 c.p.senio@esmgrp.com	Chris	Senio	2 scorecard(s)		
					1. OTM Corporate Reporter		
	<				25. Digital Modernization Reporter		
	<	40 dave	Dave	Cairns		dave	🖍 🔀
	<	21143 DonovanMcRabb@esmgrp.com	Donovan	McRabb	1. OTM Corporate Scorecard Manager		
	<	78593 Elizabeth@estrategiayseguridad.	com Elizabeth	Beza	1. OTM Corporate Browser		
Users & Security	<	5390 analyst@esmgrp.com	ESM	Analyst		analyst@esmgrp.com	
Manage Users		47457 esmcyberuser@gmail.com	ESM	Cyber User		esmcyberuser@gmail.com	
Manage Scorecard Acce	ISS	40564 csenio@esmgrp.com	ESM - Chris	Senio	32 scorecard(s)		

Picture 1: View users access levels across scorecards

2) **Manage Scorecard Access** – We simplified the approach to assign element access to users who have a custom user role eliminating the need to jump to multiple interfaces to view and assign elements to these users.

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∂ My ESM	<	1. 011/1	corporate	* Show us	ers for this scorecard	• Apply Set all	users on this page to.
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BSC Design	<	Search n	aame, email, or username	What can standard ESM r	oles do?		< Previous 1 Next > 50 per page ~
	<	÷ ID	≑ Username	First Name	🕆 Last Name	Role	Element Access
Documents and Reports	<	21119	BillD@esmgrp.com	Bill	Damien		All Elements
	<	21115				Editor -	
Strategy Admin	<	3132	BOss@esmgrp.com	Brandon	Oss	Scorecard Manager	All Elements
Admin Dashboard		78	clee@otmwidgets.com	Catherine	Lee	Limited Reporter 👻	No elements Assigned
Account Settings		77492	c.p.senio@esmgrp.com	Chris	Senio	Reporter 👻	All Elements
	<	40	dave	Dave	Cairns	Scorecard Manager	All Elements
	<	21143	DonovanMcRabb@esmgrp.com	Donovan	McRabb	Scorecard Manager	All Elements
Configuration System Options	< <	78593	Elizabeth@estrategiayseguridad.com	Elizabeth	Beza	Browser 👻	All Elements
Users & Security	<	5390	analyst@esmgrp.com	ESM	Analyst	Analyst 👻	10 Element(s) Assign Elements
Manage Users							Risk: C3. Rare Metal Supply Chain Sourcurg Objective: F1. Achieve positive EBITDA cont.
Manage Scorecard Access	s						Measure: C2a. Error Rate
User Roles							📀 Initiative: K101. Implement CRM System
Manage Element Advocat	es						Initiative: K105. Implement System Productivity Improvements
ー の ESM Admin							Driver: Commercial Error Rate

Picture 2: Easily manage users access level and quickly assign elements to custom user roles

Additionally, we updated the interface to bulk change user roles. You can now more easily filter users by scorecard and bulk change their access level.

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й му ESM <	1. OTM	Л Corporate	•	Show users for this scored	ard Apply Set all users on	this page to: Select
) Strategy Formulation <	<u> </u>				•	
BSC Design	Search	n name, email, or username	What can stand	lard ESM roles do?	•	< Previous 1 Next > 50 per page ~
) Initiative Management <						and have been been
) Documents and Reports <	≑ ID	Username	© First Name	+ Last Name	© Role	Element Access
Scorecard Admin <	21119	BillD@esmgrp.com	Bill	Damien	Editor	All Elements
Strategy Admin <	3132	BOss@esmgrp.com	Brandon	Oss	Scorecard Admin	All Elements
Admin Dashboard	78	clee@otmwidgets.com	Catherine	Lee	Custom Data Updater (Limited Reporter)	No elements Assigned
Account Settings	77492	c.p.senio@esmgrp.com	Chris	Senio	Data Updater (Reporter)	All Elements
Communications <	40	dave	Dave	Cairns	Scorecard Admin	, All Elements
Data Management <	21143	DonovanMcRabb@esmgrp.com	Donovan	McRabb	Scorecard Admin	All Elements
Configuration <	78593	Elizabeth@estrategiayseguridad.com	Flizabeth	Beza		, All Elements
System Options <						
Users & Security < Manage Users	5390	analyst@esmgrp.com	ESM	Analyst	Restricted Data Updater (Analyst) -	. 10 Element(s)
	47457	esmcyberuser@gmail.com	ESM	Cyber User	Scorecard Admin	, All Elements

3) **User Roles** – We provide more detailed insights into the permissions of each user role including a count of the number of users who have that Role in one or more scorecards within your account. We also updated the names of the user roles to provide more clarity. Additionally, you can now view a list of users for each access level via a popup by clicking the number next to the each user role.

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Strategy Formulation	<	Expand All Collapse All							Assigned Elemen	nt Roles
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		✓ Account Settings								
Initiative Management	< .	> Formulate Strategy								
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Strategy Admin	<	> Build Scorecard (Edit Score	card Structure)							
Admin Dashboard		Manage Strategy Maps (con	figurable)	0	\odot	\odot	0	0	0	0
Account Settings		Build Scorecard (Rapid Des	ign) (configurable)	0	\odot	\odot	0	0	0	0
Communications		Define Objectives, Measure	es, Initiatives and Mappings (configurable)	0	\odot	\odot	0	0	0	0
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Configuration System Options		> Access to Elements (Object	ives, Measures, Initatives)							
	<	> Strategy Views & Reports								
Users & Security		> Communications								
		> Documents								
Manage Scorecard Access	S	✓ Dashboards								

Picture 3: Detailed view of the user roles

4) **User Roles Nomenclature -** We will roll out the following changes to the User Role nomenclature. The functionality of the user roles does not change, but the change makes it clear what each user type is accomplishing.

Client Admin (5)	Scorecard Admin (13)	Editor (4)	Data Updater (Reporter) (4)	Browser (4)	Custom Data Updater (Limited Reporter) (3)	Restricted Data Updater (Analyst) (5)
		Old Name		New Na	ame	
	Lir	nited User R	oles	Custom Use	er Roles	-
		Reporter		Data Up	dater	_
	L	imited Repor	rter	Custom Data	u Updater	_
		Analyst	F	Restricted Dat	ta Updater	_

5) **Manage Element Owners/Advocates** – The Manage Element Owners functionality is extremely useful in a few specific scenarios:

1) when a new element is added to ESM the admin is unsure who the owner of that element will be in the future but you still want to add the element to ESM

2) the admin wants to assign an element to a Non-ESM user and

3) upon adding element(s) the admin would prefer to assign the element in perpetuity to a group of users such as "IT Department" or "Human Resources".

In this release, we simplified the interface to manage custom owners/advocates and clarified how to replace them with a 'real' ESM user if desired at a later date

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		Al Grigalunas		Click to Select ~		7/8/2013	×
Documents and Repo	rts <	James Brook	57 Element(s)	Click to Select ~		7/9/2013	×
Strategy Admin	<	Tony Ferguson		Click to Select ~		7/8/2013	×
dmin Dashboard		Adam Stearns		Click to Select ~		7/8/2013	×
	<	Adam Wayshak	① 27 Element(s)	Click to Select ~		7/3/2013	×
	<	Advisory Council	10 Element(s)	Click to Select ~	Kent Smack	9/3/2014	×
onfiguration	<	Angela Michaels	11 Element(s)	Click to Select ~		7/15/2013	×
Jsers & Security	<	Ashley Beck	19 Element(s)	Click to Select ~		7/3/2013	×
Manage Users		Avi Ron		Click to Select ~		7/3/2013	×
Manage Scorecard Acc	ess	Bob Moffett		Click to Select ~		7/18/2013	×
Manage Element Advo	cates	Bob Sacamano	2 Element(s)	Click to Select ~		7/8/2013	×
ESM Admin	<	Bruco Corto	4 Element(s)	Click to Soloct		7/3/2013	

Picture 4: Manage custom owners and quickly replace custom owners with an ESM user

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

Thanks!