

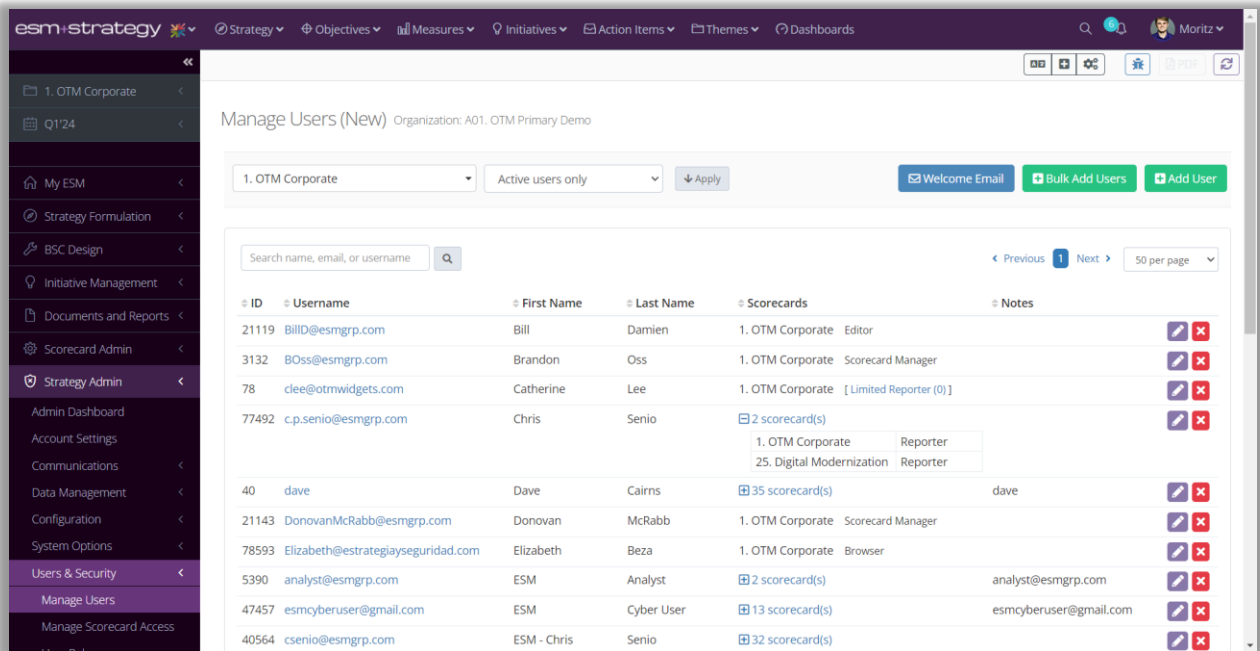


Release Notes ESM 9.7.4

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:

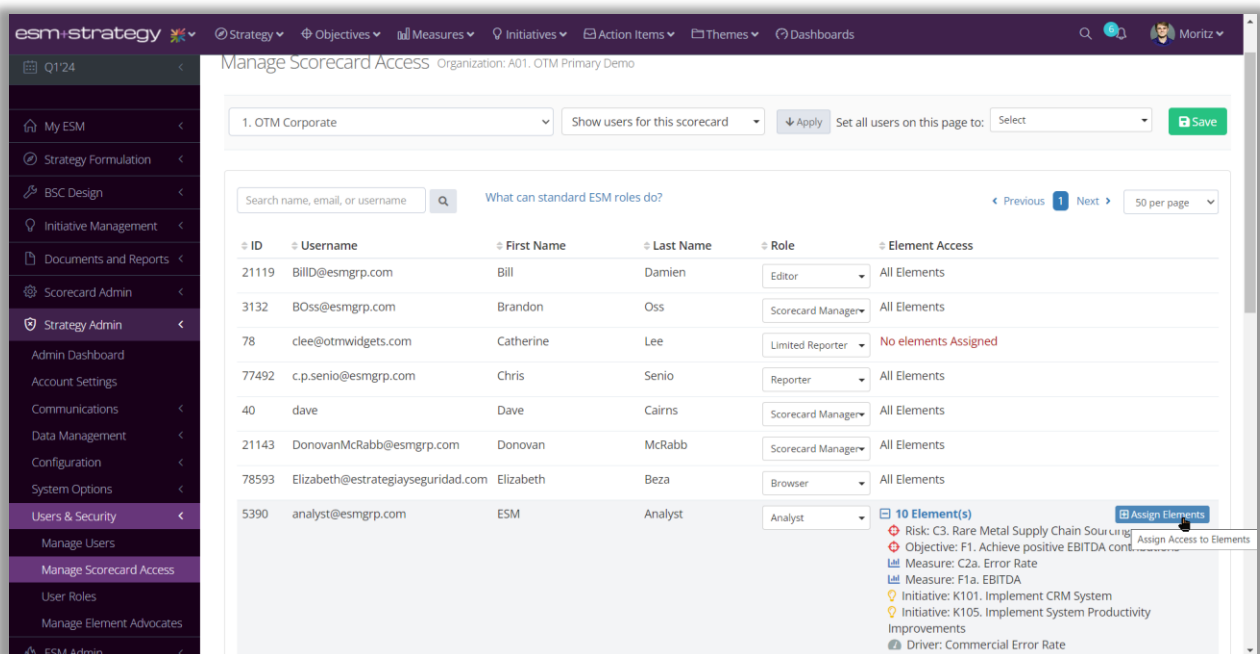
- 1) Manage Users
- 2) Manage Scorecard Access
- 3) User Roles
- 4) User Roles - Nomenclature
- 5) Manage Element Owners/Advocates

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



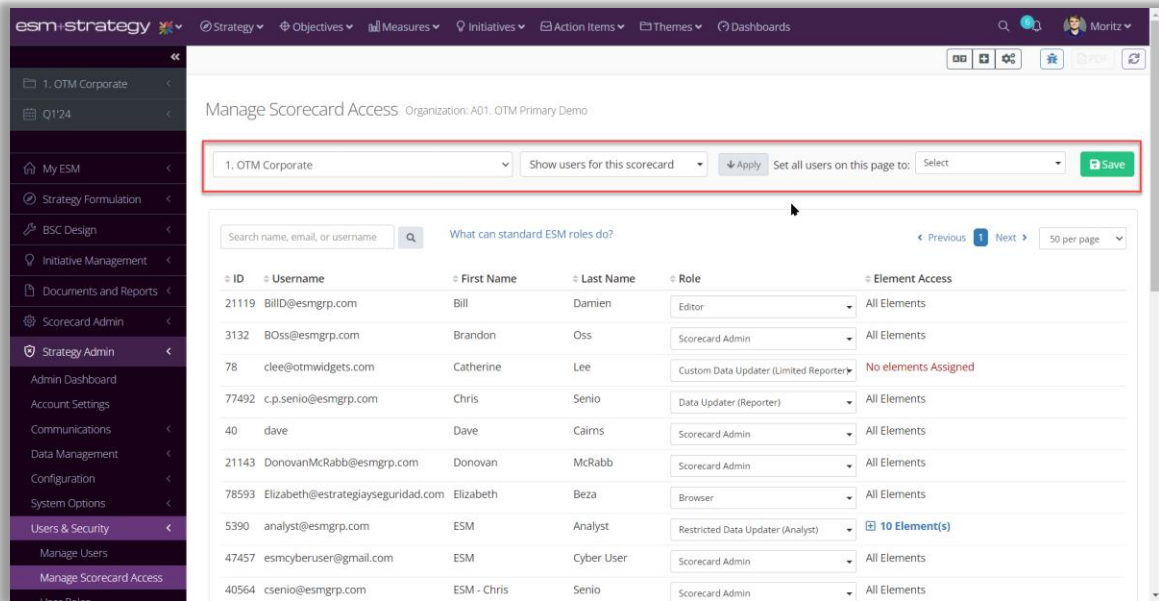
Picture 1: View users access levels across scorecards

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.

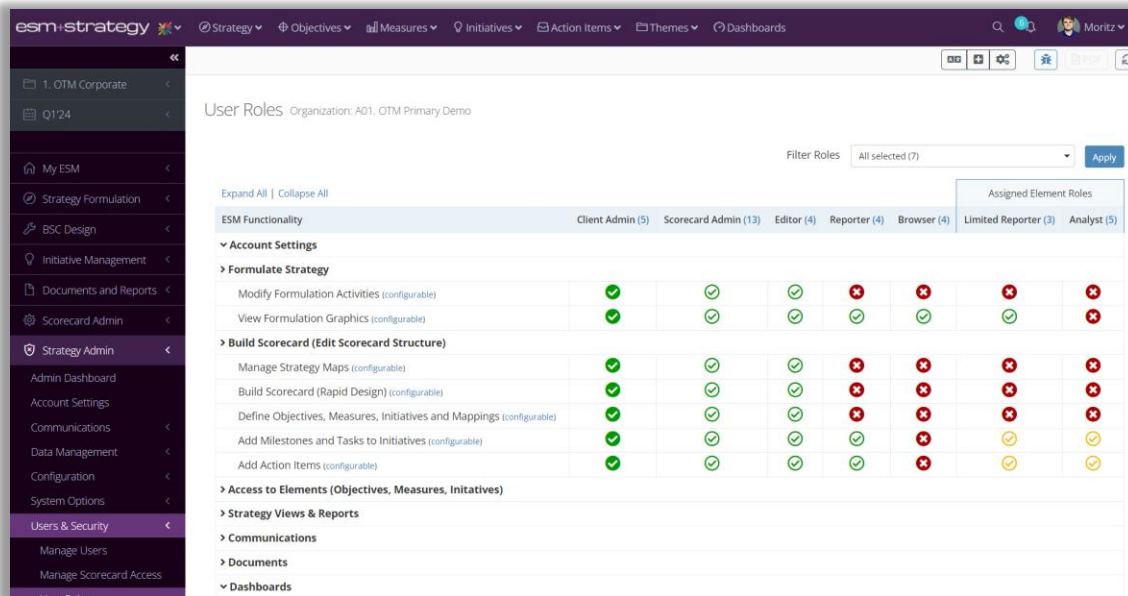


Picture 2: Easily manage users access level and quickly assign elements to custom user roles

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.



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.



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.

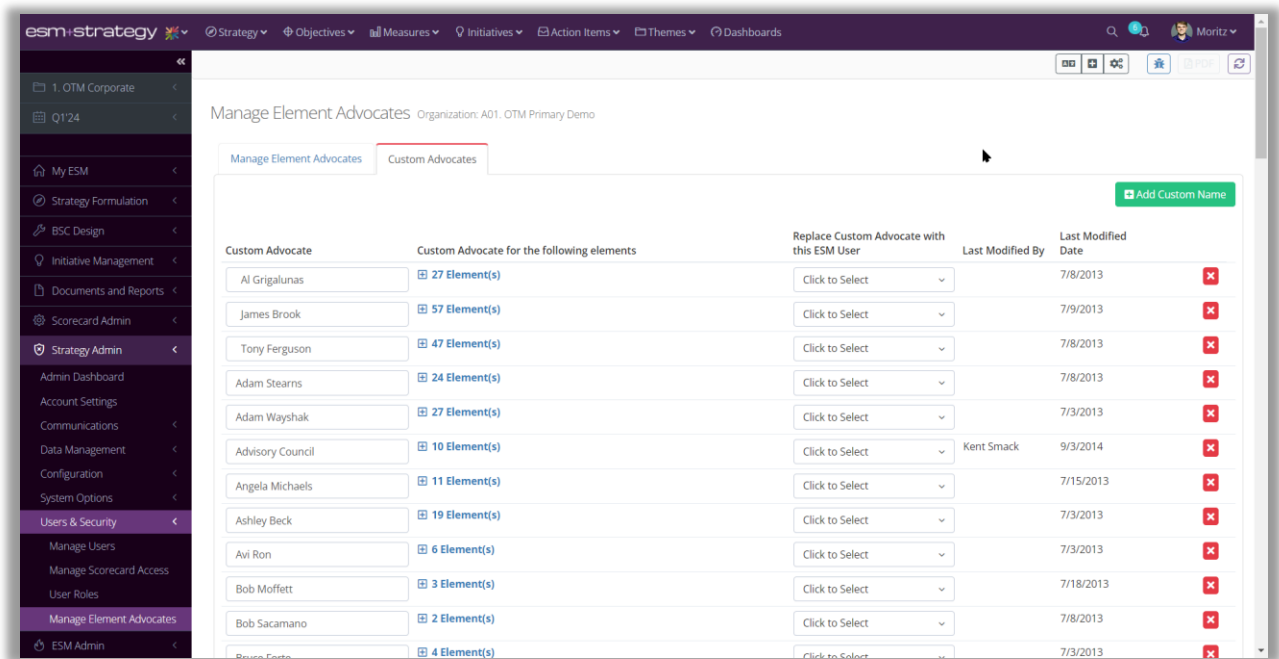
Client Admin (5)	Scorecard Admin (13)	Editor (4)	Data Updater (Reporter) (4)	Browser (4)	Custom Data Updater (Limited Reporter) (3)	Restricted Data Updater (Analyst) (5)
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Old Name	New Name
Limited User Roles	Custom User Roles
Reporter	Data Updater
Limited Reporter	Custom Data Updater
Analyst	Restricted Data 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



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!