



## **RELEASE NOTES**

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ESM+Strategy 8.0

May 2019

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# OVERVIEW

## 1.1- Document Purpose

New to the Documents and Reports section of ESM+Strategy is the Document Library, which can be found in Documents and Reports > Documents, under the “Folders” tab. The document library will help users compile their documents in a secure and orderly fashion, reminiscent of the systems most clients have in place today to manage their documents.

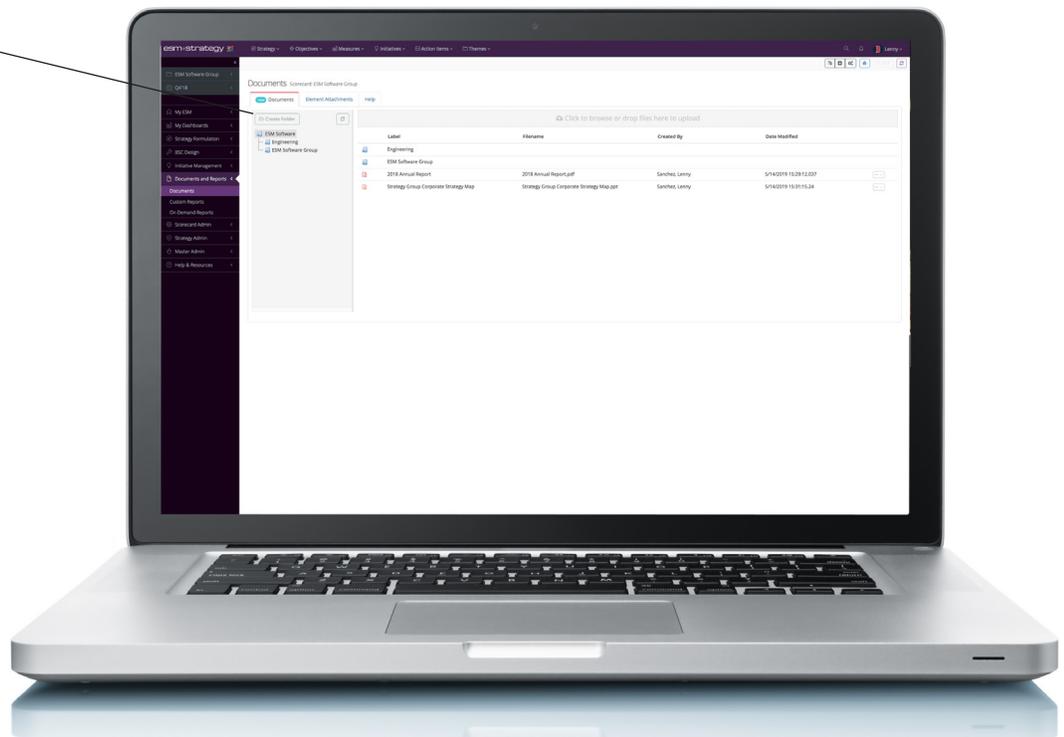
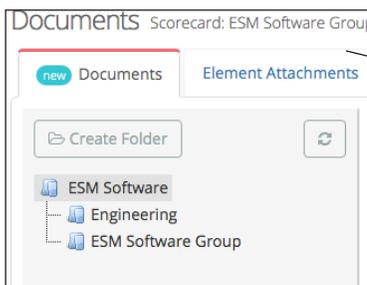
## 1.2 - Background

The Executive Strategy Manager® or ESM®+Strategy is a web-based software application that facilitates robust strategy management throughout an organization. It enables the standardization and dissemination of strategic planning processes using the proven, while increasing collaboration, positioning strategy in the right context for execution, and increasing the level of participation and engagement throughout the organization.

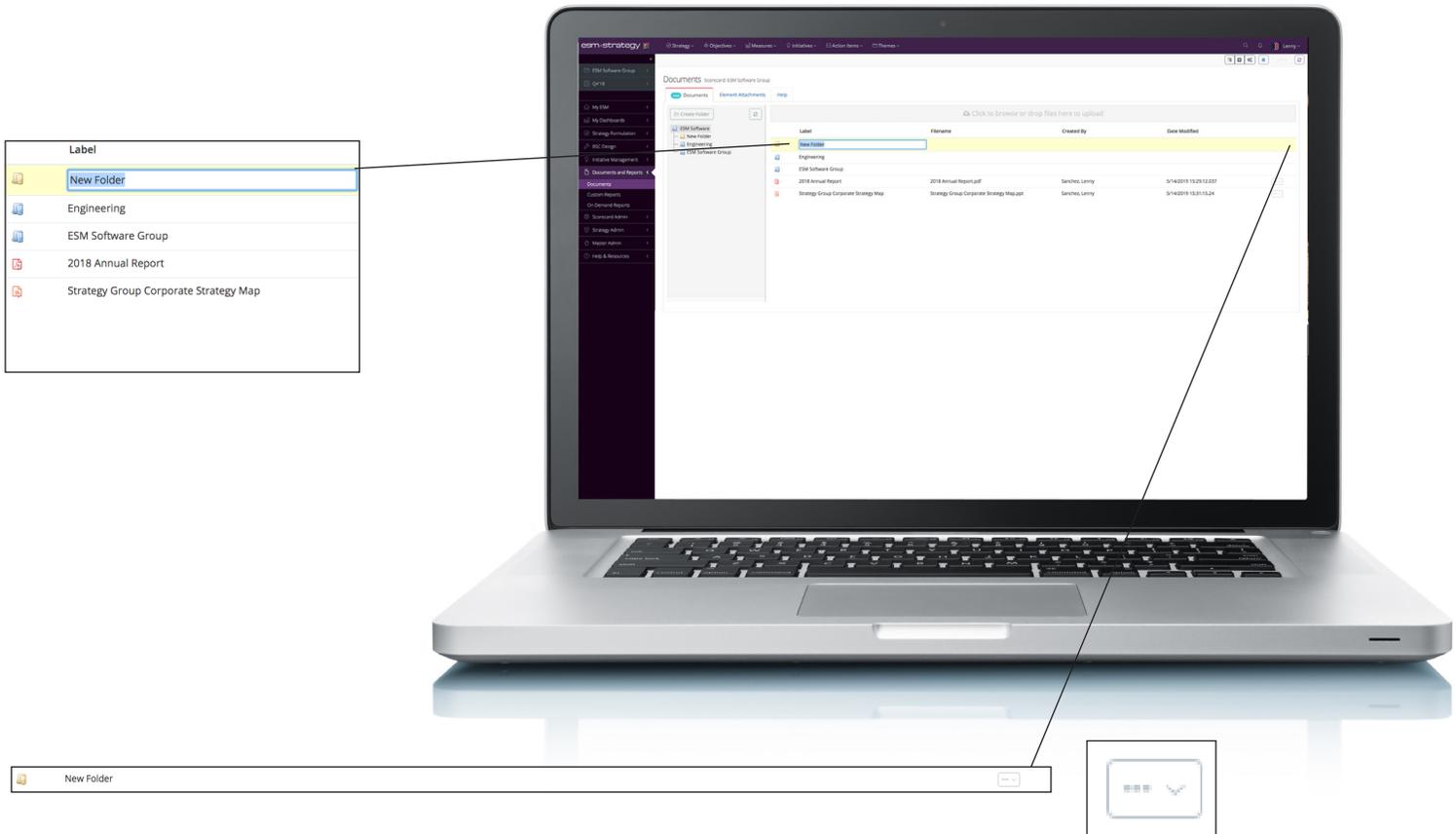
# SECTION 2 – WHAT’S NEW IN THIS RELEASE

## 2.1- Redesigned Document Library

New to the Documents and Reports section of ESM+Strategy is the Document Library, which can be found in Documents and Reports > Documents, under the “Folders” tab. The document library will help users compile their documents in a secure and orderly fashion, reminiscent of the systems most clients have in place today to manage their documents.



Once the “Create Folder” option is selected, a folder will be created within the source or user created folder which was selected prior to choosing the “Create Folder” option, and users will be prompted to assign a name to the newly created folder.



Once a folder is named, users can save their naming conventions simply by hitting the “Enter” key, or by clicking anywhere on the screen.

To edit or delete any folders which are created, users must click on the dropdown to the right of the folder’s name, which is labeled with 3 dots, or periods, and click on the rename or delete options given in the dropdown. From this interface, users are also able to download the necessary documents, by clicking on the dropdown and selecting the “Download” option.

Please note that editing and deleting root folders for accounts or scorecards, which are created by default, is not allowed.

To add a file to a folder:

1. Select the folder which you would like to add a file to
2. Drag and drop a file into the “Click to browse or drop files here to upload” field
3. Alternatively, users can click on the “Click to browse or drop files here to upload” and browse for the desired file.

After a folder and/or files have been added, users can rearrange their items by dragging and dropping items into the folder which they belong in.

Click to browse or drop files here to upload

