

# Release Notes ESM 10.0.2

The latest update to the ESM suite introduces several enhancements aimed at improving the usability and efficiency of datasheets within the application. Key improvements include the ability to bulk apply datasheet templates, simplifying setup across multiple metrics, and refinements to series type options and the interface for a more intuitive user experience.

# Release 10.0.2 (03-07-2025) Overview

#### 1. New Datasheet Templates for Bulk Application

#### **Feature Summary:**

Administrators can now create datasheet templates and apply them across multiple metrics in the system. This significantly reduces setup time by allowing users to define a standardized datasheet structure, including formulas and period roll-ups, and deploy it efficiently.

#### How It Works:

- Templates can be configured with predefined calculations and roll-up logic.
- The system ensures that datasheet templates are only applied to metrics with empty datasheets, preventing accidental data loss.
- This enhancement streamlines the scorecard configuration process, potentially saving hours of manual data entry.

esm = Trategy	■ 1. Example Scorecard × + 🖀 Q4'24 × 🛱 Quick Nav ×		🖓 Dashboards Q မြ 👰 Moritz 🗸
**			🗓 Your Free Trial will expire in 1757 days 🛛 🗳 🔅 👔 📴 🕫
☆ Home		No help assets yet	✓ X ③
Ø Formulate Strategy			
Build Balanced Scorecard <	Datasheet Templates Organization: Free Trial - Generic		
In Enter Performance Results <			
♀ Initiatives	Select scorecard(s) to manage templates for	Select an element type	
🗰 Calendar	All Scorecards -	Any Type	
Strategy Views/Reports <			
Dashboards	Template Name /Description	Usable on Scorecards	For Element Types
(*) Dashboards	X Neasure Datasheet Template Gefault	All Scorecards	<u>lan</u>
Admin <	X Driver Datasheet Template (default) This is the ESM Driver default template	All Scorecards	
Account Settings Configuration <	× 🚺 [a] Initiative Datasheet Template default This is the ESM Initiative default template	All Scorecards	
Status Indicators	🗙 📝 🚺 KPI Datasheet Template 🛛 default		~*
Reporting Periods	This is the ESM KPI default template		
Element Fields	Financial Metrics		All Element Types
Datasheet Templates			
Thresholds			
Communications <		₽.	
Manage Users and Access <			
Data Management <			
Admin/System Utilities <			
🖑 ESM Admin <			

Figure 1: The image illustrates the new template management interface, showing how administrators can define templates with a few clicks.

Once set up, the datasheets can be applied to all metrics with empty datasheets (to prevent data loss). This can reduce the risk of configuration errors, encourage consistency, and save significant labor hours in the configuration of your scorecard.

pply Datasheet Template Financial Metrics	
ssign this template to the elements below (by scorecard) - Show template	
E Scorecard: 1. Example Scorecard	
□ Scorecard: 2. Blank Scorecard	
2 of 2 data elements are eligible for this template 💡	
Measures	
V 🗠 Measure: F1.1. EBITDA	
V 🗠 Measure: F1.2. Avg cost per consumer	
0 Measures have data in the datasheet and are not eligible. Show hidden Measures	
Drivers	
0 Drivers have data in the datasheet and are not eligible. Show hidden Drivers	
KPIs	
0 KPIs have data in the datasheet and are not eligible. Show hidden KPIs	
	Close Apply and Close

Figure 2: The datasheet templates can be applied across multiple metrics with a few clicks.

# 2. Series Type Adjustments for Greater Clarity

#### **Feature Summary:**

To make report generation more intuitive, we refined the naming and organization of series types. These changes help users quickly identify which data series will be displayed in reports such as On-Demand Reports and Dashboards.

## What's New:

- **Clearer naming conventions** to indicate primary and secondary series for target and actual values.
- New series types added:
  - Percent of Target Defines a series that indicates the percent achievement of target, so that it easily accessible for reports. Formulas to calculate this series can be added seperately.
  - **Benchmark** Allows comparison against predefined benchmark values.

Template Name Measure Datasheet Template Select which scorecard(s) this template should be used All Id/Edit Data Series		v		cription SM Measure default temp lement types this templat				×
Series/Column  Actual  Target  Add New Series  Vou are editing the default template for Measures	Type	None selected • It reports)	Decimals None selected • None selected •	Calculated?	Auto Rollup Periods           None selected         •           None selected         •	- Hone		
SM Admin K					4		Close Save & C	Close Save

Figure 3: The updated series selection interface displays the new options, making it easier to customize report outputs.

## 3. Improved Datasheet Menu for Simplified Management

#### **Feature Summary:**

We streamlined the datasheet menu to make common actions more accessible. Users can now manage datasheets more efficiently with an improved Actions button.

#### **Key Changes:**

- **Centralized management –** The Actions button consolidates all datasheet-related operations, including editing, downloading, and importing data.
- More intuitive navigation The new layout improves workflow efficiency by reducing the number of steps required to modify or access datasheets.

Reporting Da	tasheet	Charts Definition	Ø 🛇				
iew data by:	Monthly, Qua	rterly and Year E•			<u>_</u>	🗄 Actions 🗸	
Period		Target	Actual	% A	Manage Datasheet		
Jan'24		\$950,000	\$920,000		Export to Excel		
Feb'24		\$950,000	\$940,000	Export to 0			
Mar'24		\$950,000	\$990,000			3V	
<b>Q1'24</b>		\$2,850,000	\$2,850,000		B Export Exc	el Template Only	
Apr'24		\$950,000	\$876,000			or remplate emy	
May'24		\$950,000	\$904,000		1 Import Data		
Jun'24		\$950,000	\$899,000		<u> </u>		
Q2'24		\$2,850,000	\$2,679,000		94%		
Jul'24		\$1,000,000	\$1,000,000	100%			
Aug'24		\$1,000,000	\$1,023,000	102%			
Sep'24		\$1,000,000	\$923,000	92%			
Q3'24		\$3,000,000	\$2,946,000	989			
Oct'24		\$1,000,000	\$934,000		93%		
Nov'24		\$1,000,000	\$990,000	99%			
Dec'24		\$1,000,000	\$1,150,000	115%			
Q4'24		\$3,000,000	\$3,074,000	102%			
FY'24		\$11,700,000	\$11,549,000		99%		
Jan'25		\$1,050,000				•	
				_	_	P	

Figure 4: The image highlights the revised menu, showing how users can quickly navigate and manage datasheets through the enhanced Actions dropdown.

# **Need Assistance?**

For any questions regarding these updates, please reach out to your ESM account manager. We appreciate your continued support and hope these improvements enhance your experience with ESM.

Thank you!