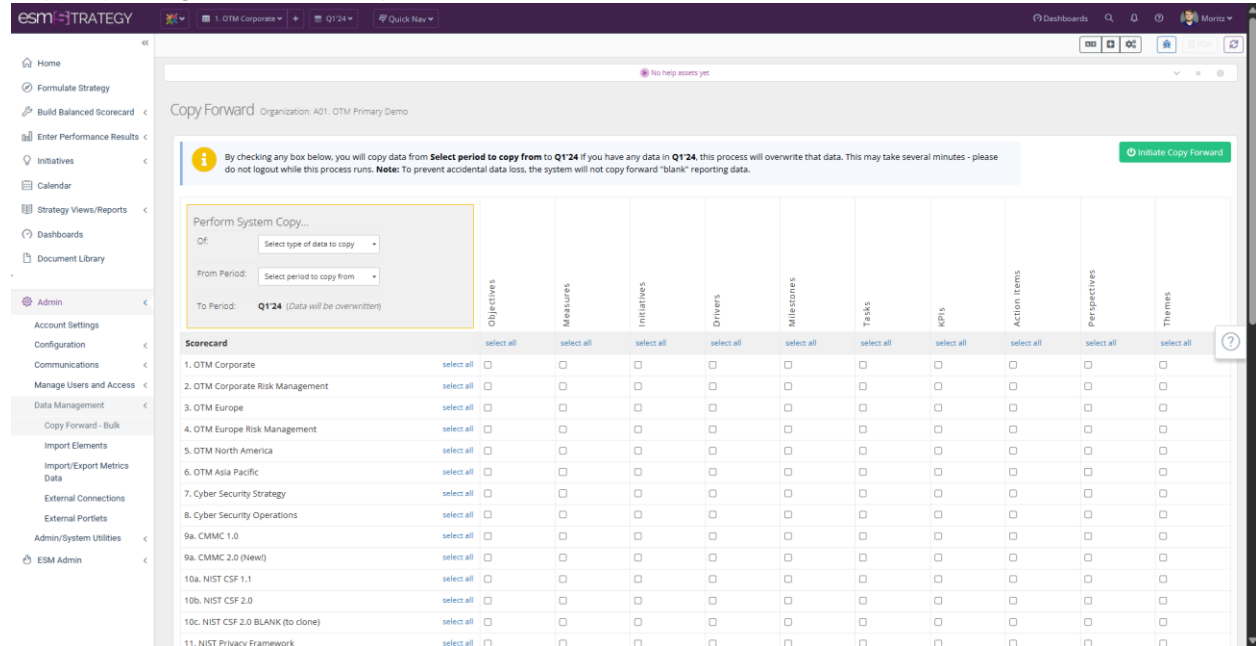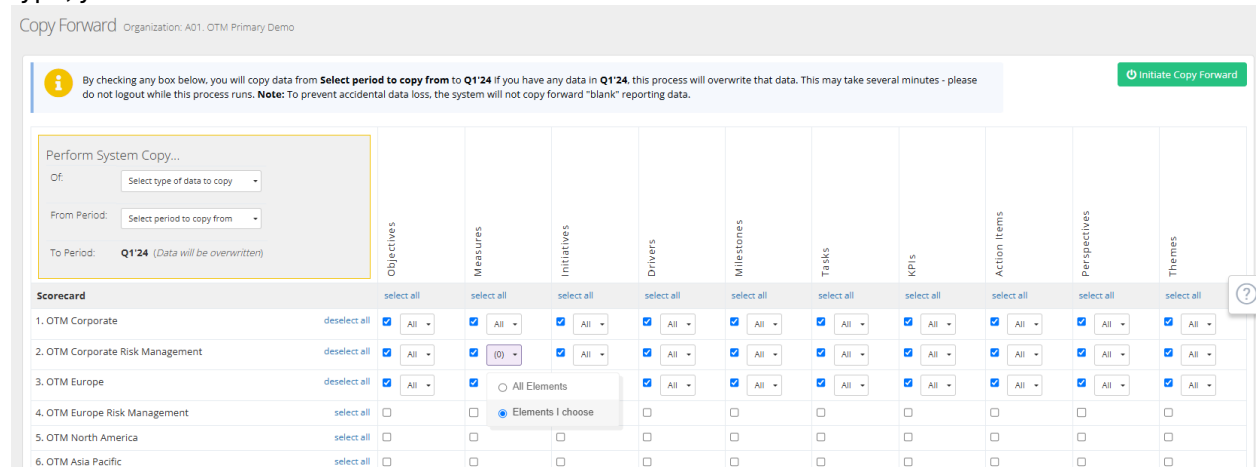# Release Notes ESM

The latest update to the ESM suite introduces enhancements to the copy forward functionality. We have upgraded the functionality to allow administrators to select specific elements or parts of the scorecard to copy forward instead of copying all elements of a specific type. This offers great flexibility in the copy forward process allowing administrators to filter elements, such as by a Perspective, Theme, or elements for a specific owner, and copy the reporting data for just those elements into a different reporting period. Additionally, we removed automatic selection of the data type and period to copy, to ensure intentional moving of the selected data to and from the appropriate period

Release Overview (3/28/2025)

System Administrators can navigate into **Admin > Data Management > Copy Forward – Bulk** to copy reporting data from one period into a different one.

We've made the following adjustments to this interface: In addition to choosing all Elements from a type, you can now **select 'Elements I choose'**.

Clicking 'Elements I choose' opens a popup that allows users to pick individual elements to be copied in the Copy Forward process. This is accomplished by choosing from the full list of elements of the type chosen or to utilize filters: F**ilter by Owner, Use My Bookmarks, or Advanced Filters** to choose the elements based on any field they capture in the system.

Before Initiating the copy forward, users are now asked to **select the data type to copy** and **the period they copy from**, instead of those fields being preselected. This ensures that administrators initiating the copy forward process are copying the correct data as intended.

Need Assistance?

For any questions regarding these updates, please reach out to your ESM account manager or send a message to clientservices@esmgrp.com. We appreciate your continued support and hope these improvements enhance your experience with ESM.

Thank you!