



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.

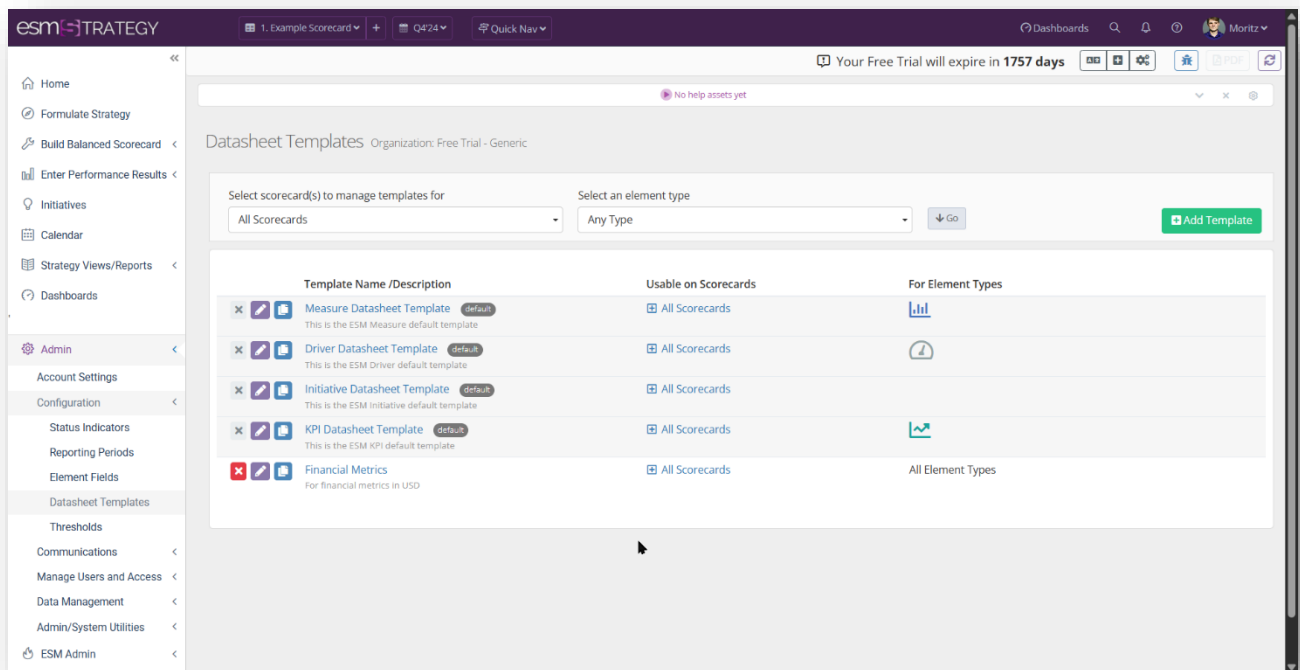


Figure 1: The image illustrates the new template management interface, showing how administrators can define templates with a few clicks.

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.

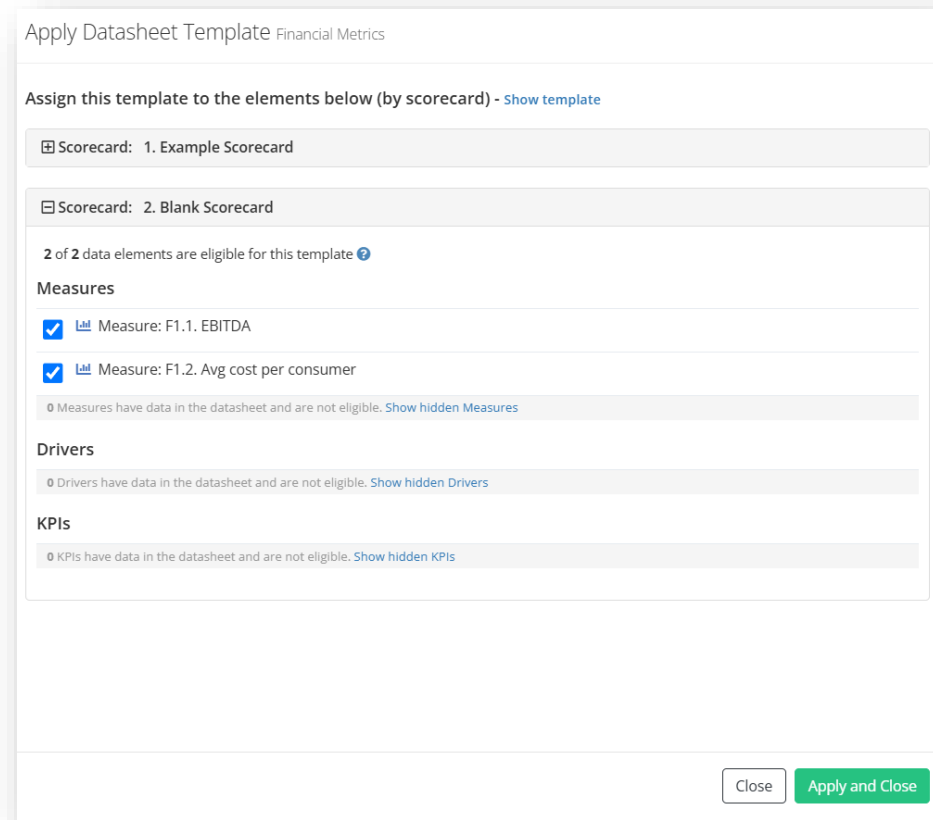


Figure 2: The datasheet templates can be applied across multiple metrics with a few clicks.

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 separately.
 - **Benchmark** – Allows comparison against predefined benchmark values.

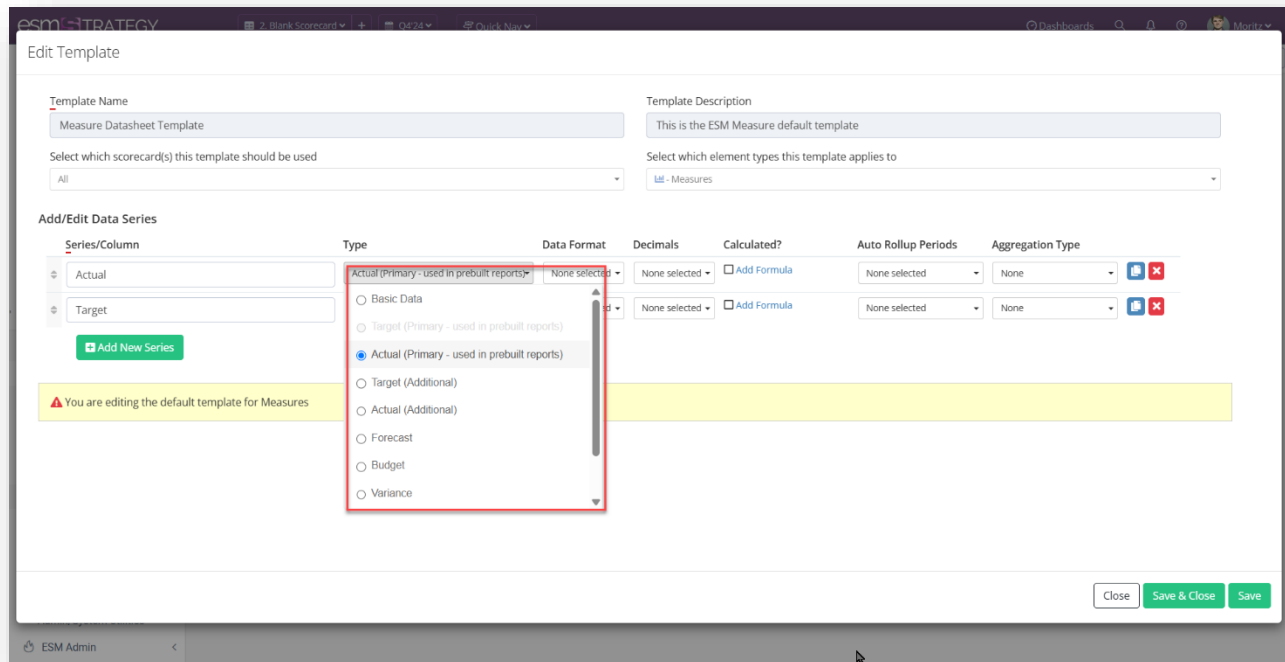


Figure 3: The updated series selection interface displays the new options, making it easier to customize report outputs.

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.

F1a. Net Profit Period: Q4'24

Reporting Datasheet Charts Definition

View data by: Monthly, Quarterly and Year E...

	Period	Target	Actual	% A
	Jan'24	\$950,000	\$920,000	
	Feb'24	\$950,000	\$940,000	
	Mar'24	\$950,000	\$990,000	
📅	Q1'24	\$2,850,000	\$2,850,000	
	Apr'24	\$950,000	\$876,000	
	May'24	\$950,000	\$904,000	
	Jun'24	\$950,000	\$899,000	
📅	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	98%
	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		

Actions

- Manage Datasheet
- Export to Excel
- Export to CSV
- Export Excel Template Only
- Import Data

Close Save & Close Save

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!