



Release Notes

ESM Strategy


Dynamic Filtering

- New to ESM+Strategy is the ability to create dynamic lists of predetermined criteria which generates live based on the criteria set. This will be available for the List of Elements Module as well as the Status Statistics modules. A new type of list is available, titled “Dynamic Set of Elements Which Meet My Criteria”, which will allow you to set your criteria ahead of time. After setting your criteria, upon navigating to your dashboard, the module will load all elements which meet your criteria.
- “Elements I select” lists have been renamed to “Static Set of Elements I Select Now”, but function exactly as they did before.
- We have added an “Add Another Filter” button to List of Elements modules and Status Statistics modules to allow you to filter by any fields enabled in your accounts.

The screenshot shows a configuration interface for creating a dynamic list. It is divided into several sections:

- Title:** A text input field for the title to display in the module.
- Select Period:** A dropdown menu currently set to "Current ESM Period".
- Type of list:** A dropdown menu set to "Dynamic set of element which meet my criteria...".
- Columns:** A dropdown menu set to "6 selected".
- Define Custom Criteria:** A section titled "Build a list of elements where..." containing a list of criteria items:
 - 1. OTM Corporate
 - Objectives
 - Filter owner
 - 5 Statuses Selected
- Select Columns:** A dropdown menu set to "None selected".
- Buttons:** "Add another filter" (with a plus icon) and "Reset" (with a circular arrow icon).

Updated “My Profile” View



Mitchell Robinson
jrousso@esmgrp.com
A01. OTM Primary Demo

📍 Location
Not specified

📝 Notes
None

[Edit Profile](#)

Login & Security

Current Active Logins: 0 | Account Locked: **No** | Last Login Date: February, 16, 2022 11:27:08 PM | Last Password Change: July, 7, 2020

Username	mrobinson23@esmgrp.com
Login Type	Standard username/password
Password	***** Change Password
2-Factor Authentication	No Setup 2-factor Auth

Preferences & Regional Settings

[Edit Preferences](#)

Default landing page for login	Use the company default
Language	English (United States)
Timezone	<i>Not specified</i>
Regional Formatting	English (United States)

- We have updated the My Profile view to make it easier for users to edit their account specific settings, change their password, and set up 2-factor Authentication.