



Release Notes ESM

The latest ESM update delivers powerful enhancements for administrators and strategy teams, including a more intuitive datasheet experience, new administrative reports, and a comprehensive change log feature.

Release Overview (4/11/2025)

1. New Datasheet Functionality

Our new Datasheet introduces usability improvements for users managing complex datasets:

Period	Target (million USD)	Actual (million USD)	Forecast	Variance
Nov'25	\$7.00	\$8.00	10.00	-1.00
Oct'25	\$5.00	\$7.00		-2.00
Q3'25	\$75.50	\$74.60	41.00	0.90
Sep'25	\$9.00	\$11.00	14.00	-2.00
Aug'25	\$8.50	\$7.50	13.00	1.00
Jul'25	\$11.00	\$10.00	14.00	1.00
Q2'25	\$78.50	\$82.60	54.33	-4.10
Jun'25	\$9.00	\$10.00	30.33	-1.00
May'25	\$12.00	\$11.00	10.00	1.00
Apr'25	\$13.00	\$13.00	14.00	0.00
Q1'25	\$86.00	\$82.79	52.00	3.21
Mar'25	\$13.00	\$13.00	25.00	0.00
Feb'25	\$15.00	\$13.00	13.00	2.00
Jan'25	\$15.00	\$13.00	14.00	2.00

- Locked Period Columns:** When scrolling horizontally, period columns stay fixed—making it easier to manage data across multiple series.

Period	North America - Actual	Asia Pacific - Actual	Asia Pacific - Target	South America - Target
Apr'25		\$6.00	\$7.00	
Q1'25	\$13.50	\$14.00	\$21.00	\$19.00
Mar'25		\$3.00	\$7.00	
Feb'25		\$5.00	\$7.00	
Jan'25		\$6.00	\$7.00	
FY'24		\$41.70	\$49.00	
Q4'24	\$11.00	\$17.00	\$15.00	\$18.00
Dec'24		\$7.00	\$7.00	
Nov'24		\$7.00	\$5.00	
Oct'24		\$3.00	\$3.00	
Q3'24	\$12.90	\$9.00	\$13.00	\$17.00
Sep'24		\$3.00	\$5.00	
Aug'24		\$3.00	\$5.00	
Jul'24		\$3.00	\$3.00	

Sort Data Series: Quickly reorder or sort periods by value, helping you identify top-performing time frames with ease.

F1a. EBITDA Period: Q1'24

Reporting Datasheet Charts Definition

View data by: Month, Quarter and Year End

Period	Target (million USD)	Actual (million USD)	Forecast	Variance	Cumulative Vari
FY'25	\$177.50	\$179.60	170.33	-2.10	
Q4'25	\$70.50	\$77.30	23.00	-6.80	
Dec'25	\$9.00	\$9.00	13.00	0.00	
Nov'25	\$7.00	\$8.00	10.00	-1.00	
Oct'25	\$5.00	\$7.00		-2.00	
Q3'25	\$75.50	\$74.60	41.00	0.90	
Sep'25	\$9.00	\$11.00	14.00	-2.00	
Aug'25	\$8.50	\$7.50	13.00	1.00	
Jul'25	\$11.00	\$10.00	14.00	1.00	
Q2'25	\$78.50	\$82.60	54.33	-4.10	
Jun'25	\$9.00	\$10.00	30.33	-1.00	
May'25	\$12.00	\$11.00	10.00	1.00	
Apr'25	\$13.00	\$13.00	14.00	0.00	
Q1'25	\$86.00	\$82.79	52.00	3.21	

Close Save & Close Save

- **Regional Currency Formatting:** Currencies now display using region-specific formatting—for example, commas and periods conform to your local settings.

F3b. Average Net Selling Price per Ton (YTD) Period: Q1'24

Reporting Datasheet Charts Definition

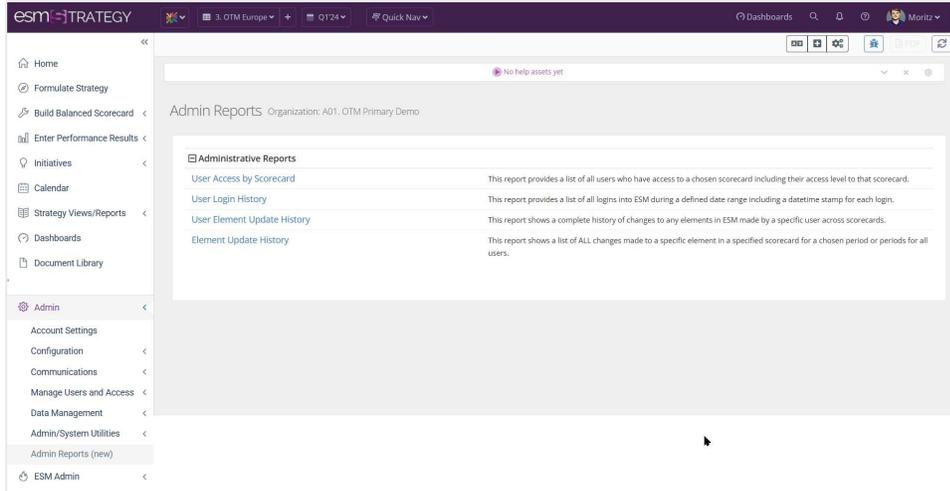
View data by: Month, Quarter and Year End

Period	Actual - EU	Actual - GB	Budget	Marine	Industrial	Automotive
Aug'25						
Jul'25						
Q2'25						
Jun'25						
May'25						
Apr'25	463,43 €	€421,56				
Q1'25	470,90 €	€443,21				
Mar'25	451,67 €	€378,54				
Feb'25	463,43 €	€421,56				
Jan'25	470,90 €	€443,21				
FY'24	451,67 €	€378,54				
Q4'24	463,43 €	€421,56				
Dec'24	470,90 €	€443,21				
Nov'24	451,67 €	€378,54				

Close Save & Close Save

2. New Admin Reports

The new Administrative Reports section provides enhanced visibility into user activity and system changes within ESM. With detailed insights into user access, login history, and element updates, administrators can more effectively monitor engagement, track accountability, and maintain scorecard integrity across the organization.



Below are the four new Administrative Reports:

1. User Access by Scorecard

This report provides a list of all users who have access to a chosen scorecard including their access level to that scorecard.

How it works:

- Select a scorecard and click Apply
- A list of users and their access levels will appear
- Click Export to download the report in a CSV or Excel file

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3. OTM Europe Total Users with Access: 8 Apply

Search name, email, role, or username Export < Previous 1 Next > 25 per page

First Name	Last Name	Username	Email Address	Scorecard	Access Level
Dave	Cairns	dave	dcairns@esmgrp.com	3. OTM Europe	Scorecard Admin
Elizabeth	Baeza	ebaeza@estrategiayseguridad.com	ebaeza@estrategiayseguridad.com	3. OTM Europe	Scorecard Admin
Ervin	Cano	ecano@estrategiayseguridad.com	ecano@estrategiayseguridad.com	3. OTM Europe	Scorecard Admin
Hannah	Reese	HReese@esmgrp.com	ksmack@esmgrp.com	3. OTM Europe	Browser
Kent	Smack	ksmack	ksmack@esmgrp.com	3. OTM Europe	Scorecard Admin
Mo	Marchart	moritz.marchart@gmail.com	moritz.marchart@gmail.com	3. OTM Europe	Custom Data Updater (Limited Reporter)
Roger	Lemons	RogerLemons@esmgrp.com	RogerLemons@esmgrp.com	3. OTM Europe	Scorecard Admin
Sam	Rockwell	srockwell@esmgrp.com	srockwell@esmgrp.com	3. OTM Europe	Data Updater (Reporter)

2. User Login History

This report provides a list of all logins into ESM during a defined date range including a datetime stamp for each login.

How it works:

- Define a date range, click Apply, and view login activity
- Click a user to see a list of their logins by date and time
- Click Export to download the report in a CSV or Excel file

User Login History Organization: A01. OTM Primary Demo

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Logins Between: 3/12/2025 and: 4/12/2025 Apply

Search name, email, or username Export

Email Address	First Name	Last Name	Username	Login Date
AProov@esmgrp.com (2 Logins)				
AProov@esmgrp.com	Alan	Proov	AProov@esmgrp.com	3/25/2025 02:04:53 pm
AProov@esmgrp.com	Alan	Proov	AProov@esmgrp.com	3/28/2025 03:09:10 pm
csenio@esmgrp.com (11 Logins)				
dcairns@esmgrp.com (39 Logins)				
ecano@estrategiayseguridad.com (1 Logins)				
eguerra@estrategiayseguridad.com (3 Logins)				
kentsmack@gmail.com (3 Logins)				
ksmack@esmgrp.com (26 Logins)				
mmarchart@esmgrp.com (98 Logins)				
mpurrington@esmgrp.com (29 Logins)				

3. User Element Update History

This report shows a complete history of changes to any element in ESM made by a specific user within the chosen scorecard.

How it works:

- Filter by user, change type, scorecard, and (if applicable) period
- Click Apply to view changes
- Click Export to download the report in a CSV or Excel file

User Element Update History Organization: A01. OTM Primary Demo

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Moritz Marchart ▼ Period-based Reporting Fields ▼ 1. OTM Corporate ▼ Q1'24 ▼

Modified Between: 3/12/2025 📅 and: 4/12/2025 📅 Apply

Search name, element name, or field name Export < Previous 1 Next > 50 per page ▼

Scorecard	Element Type	Element	Field Name	Change	Period	Modified By	Last Modified Date
1. OTM Corporate	Objective	C2. Give Me a Top Quality Product Experience	Status	Caution	Q1'24	Moritz Marchart	4/4/2025 10:48:11 am
1. OTM Corporate	Measure	C2a. Error Rate	Status	At or Above Target	Q1'24	Moritz Marchart	4/4/2025 10:48:10 am
1. OTM Corporate	Objective	F5. Reduce total cost of production	Status	Caution	Q1'24	Moritz Marchart	4/4/2025 09:11:32 am
1. OTM Corporate	Initiative	K102. C3 Retooling and upgrade	Status	Below Plan	Q1'24	Moritz Marchart	3/25/2025 12:15:03 pm
1. OTM Corporate	Theme	Customer Account Management	Status	Caution	Q1'24	Moritz Marchart	3/25/2025 12:15:03 pm
1. OTM Corporate	Perspective	Customer Perspective	Status	Caution	Q1'24	Moritz Marchart	3/25/2025 12:15:03 pm

4. Element Update History

Review all changes to a selected element made by any user.

How it works:

- Select a scorecard, element type, element, and time frame
- Click Apply to view the update history
- Click Export to download the report in a CSV or Excel file

Element Update History Organization: A01: OTM Primary Demo

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1. OTM Corporate Measure F1a. EBITDA Metrics Data Q1'24 Apply

Modified Between: 3/9/2025 and: 4/14/2025

Search name, element name, or field name Export < Previous 1 Next > 50 per page

Scorecard	Element Type	Period	Data Series Label	Change	Modified By	Last Modified Date
1. OTM Corporate	Measure	Q1'24	Forecast	42	Zach Muse	4/12/2025 12:33:40 am
1. OTM Corporate	Measure	Q1'24	Forecast	36	Zach Muse	4/12/2025 12:32:11 am
1. OTM Corporate	Measure	Q1'24	Cumulative Variance	4.9	Zach Muse	4/12/2025 12:32:11 am
1. OTM Corporate	Measure	Q1'24	% Variance	0.0239234	Zach Muse	4/12/2025 12:32:11 am
1. OTM Corporate	Measure	Q1'24	Variance	1.5	Zach Muse	4/12/2025 12:32:11 am
1. OTM Corporate	Measure	Q1'24	Threshold Value (ESM)	0.976077	Zach Muse	4/12/2025 12:32:10 am

3. Elements Change Log:

Each element now includes a Change Log. This feature provides quick visibility into what changed, when, and by whom—ideal for compliance and quality control.

The change log is accessible on any element detail page by extending the Actions dropdown and clicking on View Change Log menu item.

The screenshot shows the ESM Strategy interface for the 'F1a. EBITDA' element. The top navigation bar includes the logo, organization name, and various utility icons. The main content area displays the element name, a status indicator (Caution), and a definition: 'In the short term, achieve a cash neutral position (breakeven EBITDA level) by the end of third quarter next year (3Q04) and limit 2024 operating losses to \$1.8M or less.' Below the definition is a trend chart for 'EBITDA (in million USD)' and a performance analysis section stating 'On Track, to plan. No significant findings at this point in time.' The 'Actions' dropdown menu is open, showing options like 'Bookmark', 'Subscribe', 'Add Action Item', and 'View Change Log', with the latter highlighted by a red box.

This action opens a pop-up window. Select the type of changes, period (if applicable), and date range of the changes you seek. Click apply to view any changes. Easily export the list of changes to Excel or CSV by clicking on the Export button.

Change Log Snapshot for F1a. EBITDA

Last Modified By: Zach Muse On: 4/11/2025 11:32:09 PM
Datashet Metric(s) Last Entered by: Zach Muse On: 4/11/2025 11:33:39 PM

Metrics Data Q1'24 Modified Between: 2/13/2025 and: 4/14/2025 Apply

Search name, element name, or field name Export < Previous 1 Next > 50 per page

Scorecard	Element Type	Period	Data Series Label	Change	Modified By	Last Modified Date
1. OTM Corporate	Measure	Q1'24	Forecast	42	Zach Muse	4/12/2025 12:33:40 am
1. OTM Corporate	Measure	Q1'24	Forecast	36	Zach Muse	4/12/2025 12:32:11 am
1. OTM Corporate	Measure	Q1'24	Cumulative Variance	4.9	Zach Muse	4/12/2025 12:32:11 am
1. OTM Corporate	Measure	Q1'24	% Variance	0.0239234	Zach Muse	4/12/2025 12:32:11 am
1. OTM Corporate	Measure	Q1'24	Variance	1.5	Zach Muse	4/12/2025 12:32:11 am
1. OTM Corporate	Measure	Q1'24	Threshold Value (ESM)	0.076077	Zach Muse	4/12/2025 12:32:10 am

Close

Need Assistance?

For any questions regarding these updates, please reach out to your ESM account manager or email clientsupport@esmgrp.com.

We appreciate your continued support and hope these improvements enhance your experience with ESM.

Thank you!