



EPC Release Notes

12.1 — Last update: Aug 31, 2020

Interfacing Technologies Corporation

Table of Contents

Disclaimer	2
Overview	3
WHAT'S NEW IN 12.1.....	4
Different Custom Home Tabs for Different Audiences	5
Adding, Removing and Re-Naming Tabs	5
Re-ordering Tabs.....	6
Permission on Tabs	7
Mass-Update Features.....	8
Mass-Publish	9
Mass-Assignment	10
Mass-Subscribe	11
Mass-Collaboration.....	12
Glossary	13
Link to Glossary.....	14
Compliance with Digital Signature	15
Signature Image Management	16
Copy/Paste Across Process Maps.....	16
Document Parser	17
Map Page-Break Canvas	20
Quick Form Process Creation	21
FEATURE ENHANCEMENTS	23
Swimlane Mapping Shortcuts	24
Artifacts as Flow Objects.....	25
Object Book Enhancement.....	26
Create Environment Default List View	30
Tooltip on Tree & List Views.....	31
Requirement & User Acceptance Test On Task.....	33
IPL Tree Selector	34
Sequence Order In RASCI	34
View Publish Comment In Version History.....	35
Minor Publish Does Not Update Review Date.....	35
Preview Document In Edit Form	36
Document Properties in Details Page	36
Widget to Filter Categories.....	37
Improved Details Page Layout	37
Tree Selector Enhancements	38
View Process Name in Edit Graph Mode.....	39
Task duration used in Simulation	40
Map Annotations Improvements	40
Easier Change of Preferred Process Map	41
Events & Gateway Annotation Settings	41

UI in Romanian	42
Performance Enhancements	43
FIXED ISSUES	44
Issue List 12.1.....	44
KNOWN ISSUES	46
Known Issue List 12.1	46

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Overview

The objective of EPC version 12.1 is to enhance the EPC Web App, and to facilitate user engagement capabilities, while improving the general usability of the Web App. The V 12.1 release also delivers fixes to issues and enhancements related to the Web App. This document will communicate the new features and enhancements, resolved and known issues related to this release.

See the overview of [what's new](#) and the new [feature enhancements](#) for this release!

WHAT'S NEW IN 12.1

The following major new features and capabilities have been introduced in the 12.1 release

[Different Custom Home Tabs for Different Audiences](#) | Administrators can now configure multiple custom default tabs for different user groups' complex or simple needs (e.g. Quality analyst, vs. end user, vs. risk manager, vs. IT analyst, vs. country specific, etc.) Different default landing pages, widgets and # of tabs are all out-of-box options.

[Mass Update](#) | Users can now complete bulk update actions on MANY objects all at the same time with a single click. Mass update actions for Editors include the ability to Bulk Edit many RESPONSIBILITIES at the same time within a single RASCI-MATRIX or mass publish content approved for roll-out. End Users can also mass-subscribe to many objects at once for all objects they want to be notified automatically based on discussions and changes. End users can also now raise one central change request (improvement request) that is tied with many objects at once. The overall change request will remain open until all sublevel object actions have been implemented and closed. This is the first version of mass update, many additional mass update functions are planned within the roadmap ahead.

[Glossary](#) | Standardize and manage all acronyms, terms and their related definitions centrally within the glossary module and then reuse the terms and acronyms directly within any rich text field on any object. Updates within the glossary can be easily propagated across the system to all text fields, reducing the effort to ensure consistency across your documentation. Moreover, users can hover over any term or acronym and the definition will automatically pop-up so users understand exactly what the term means without having to navigate away.

[Digital Security Compliance](#) | The 21 CFR Part 11 compliant digital signatures were extended to not only sign the data directly but also generate a pdf document injected with user's signature and time/date and location of approval. The pdf documents are an easy to use method to prove content audit history and approval and are secured against any potential future tampering.

[Copy Paste Across Maps](#) | Copy/paste all or a subset of flow-objects (including their details and associations) from one map to another. EPC12 was limited to copy/paste flow-objects within a single map, or copy/paste the entire map.

[Document Parser](#) | Parse, convert and upload PDF/Word text-based documents directly into EPC content. Convert your current standard operating procedures, user manuals, training guides and work instructions into process maps including all related information as well (roles, systems, regulations, glossary terms, KPIs, risks or controls). Also useful for converting external law and regulatory documentation from PDF (e.g. FDA, FAA, SOX, NRC, ISO, etc) into EPC libraries as well.

[Map Page-Break Canvas](#) | Improve your map output quality using the map page break canvas. A page break canvas overlay is now available within the map edit screen so that users can optimize map layouts by condensing shapes to fit on the minimum number of pages possible and visualize where the process will be cut across pages. The page-break canvas size & orientation is configurable within the admin settings and standardized across the organization.

[Quick Form Process Creation](#) | Using quick form builder, users with no process mapping experience can easily document their step-by-step procedures in a simple one-page form and the EPC will automatically build the process map for them. Users can capture the step name(task), who's responsible and write or copy/paste a detailed rich text procedure of each task.

Different Custom Home Tabs for Different Audiences

Functionality

EPC's home page is fairly customizable as it has many tabs and widgets to help users organize their tasks, prioritize and build their own dashboard. This additional editing feature will cover many areas such as adding and removing tabs, re-ordering tabs for a priority and ease-of-use and finally, user will be capable of setting permission on users and groups who will have access to the given tabs. The scale of use has been widened to allow better management and team organization.

Customization

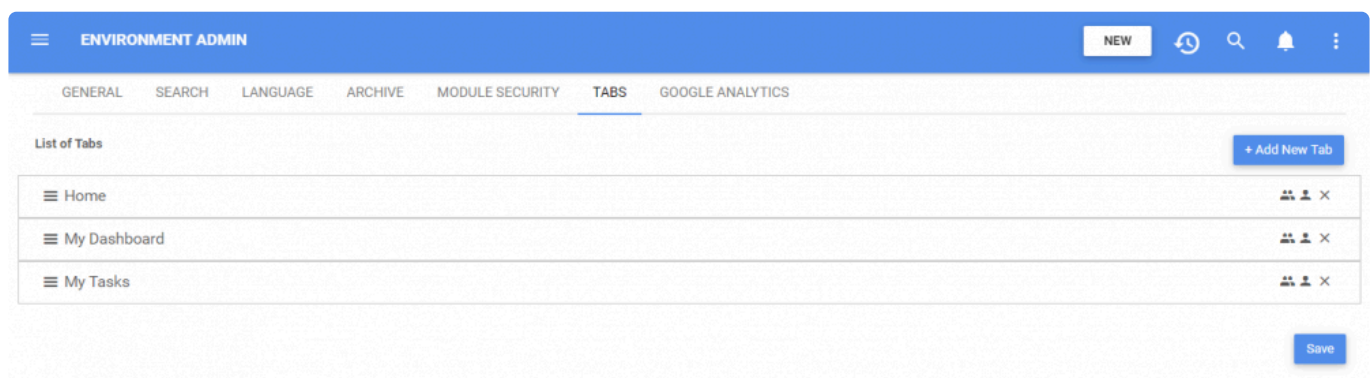
There are several ways to customize your Home Tabs; see the following links for further details and instructions.

[Adding, Removing and Re-naming Tabs](#)

[Re-ordering Tabs](#)

[Permission on Tabs](#)

Preview



Adding, Removing and Re-Naming Tabs

Functionality

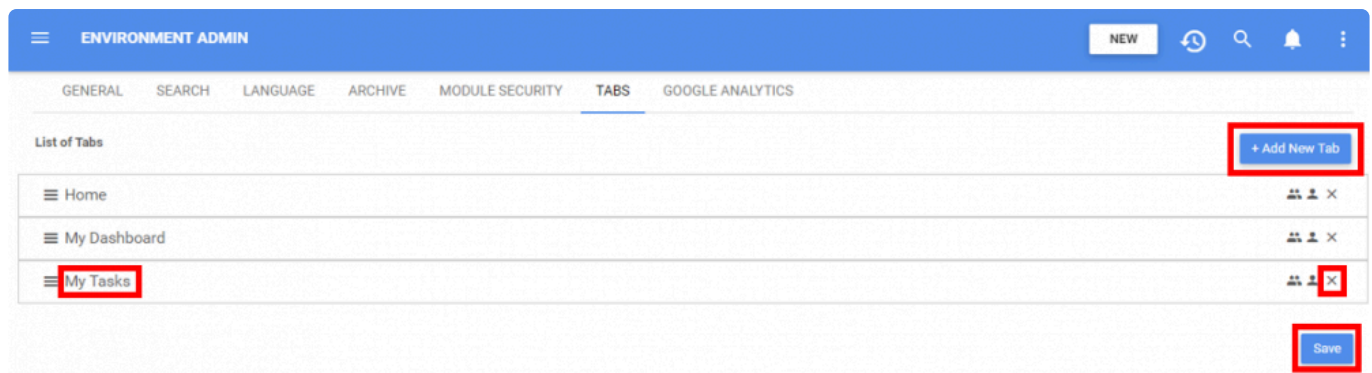
These functions are available for system and environment administrators to operate. There are three

default tabs to all new environments such as “Home”, “My Dashboard” and “My Tasks”. These can be removed or adapted to any individual’s liking.

Customization

A user simply navigates to the Environment Admin. Page and clicks on the “Tabs” column. To add a new home tab, a user clicks on the “+ Add new Tab “ button and a new “Home Tab” selection will appear where they will be capable of editing its name. To remove a tab, user will be required to click on the “X” icon.

Preview




Re-ordering Tabs

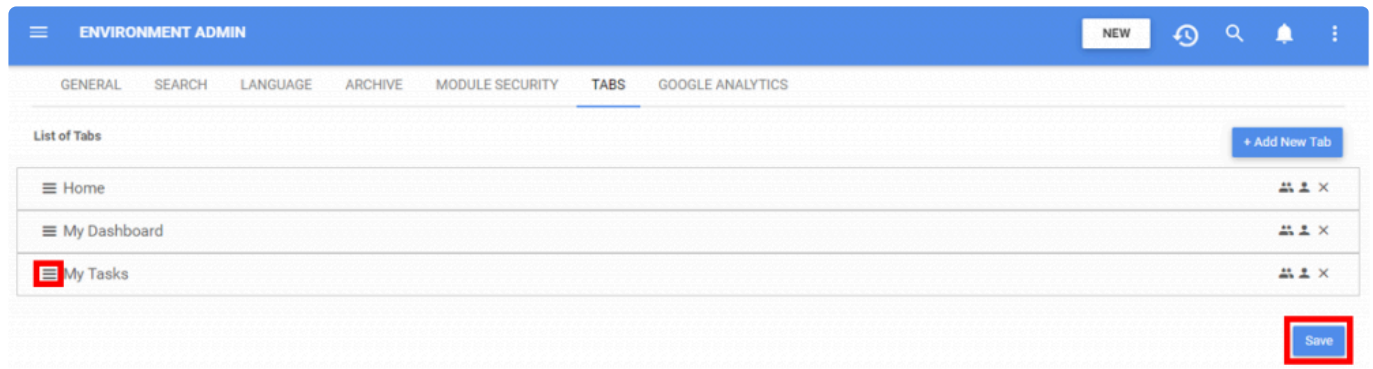
Functionality

This function is fairly simple as it allows user to set their organization of tabs in a favorable order.

Customization

To re-order tabs a user simply navigates to the Environment Admin. Page and click on the “Tabs” column where they will be able to select the tab he/she would like to reorder by the  icon and drag to the desired position.

Preview



Permission on Tabs

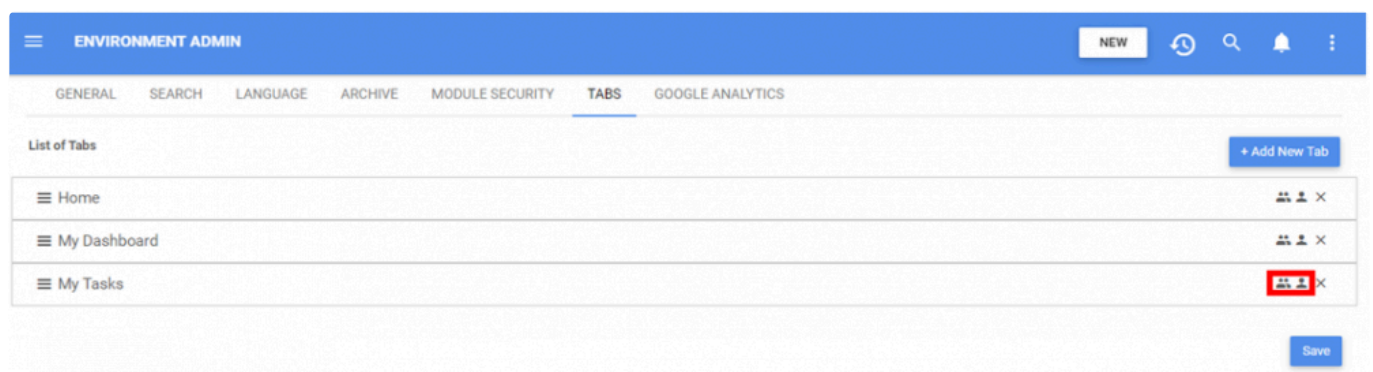
Functionality

The permission function is the most advanced setting for tabs which will allow individuals and/or teams to privatize and centralize their tab information in a single location. By default, all new created tabs have the “everyone” group already assigned and given view permission until permission is edited. The view on permission is only visible once a user logs off and relogs into their account.

Customization

To customize permission on tabs, a user navigates to the Environment Admin. Page and click on the “Tabs” column where they select the group or user icon for the desired tab for which a permission editing window will appear. All that is required is to type the name of the user or groups in the “Select a user/group” section to add them to the list of authorized users and close the window.

Preview





Edit Users of: My Tasks

To add a user to this home tab, type the desired username, first or last name below and click on the desired user within the drop down.

Select a User

Type to Find a User

User Name	First Name	Last Name
<input type="text"/>	<input type="text"/>	<input type="text"/>

« < 1 > »
Show: 10 - 25 - 50

Close

Mass-Update Features

Functionality

Mass-Editing Features are the newest addition to the EPC's list view page. These features allows for multiple/bulk editing on objects on EPC. Features such as Publishing, Collaboration, Responsibility Assignments and many more will be available. These features will be accessible through the list view of all modules for all users.

See the following to learn more about each feature:

[Mass-Publish](#)

[Mass-Assignment](#)

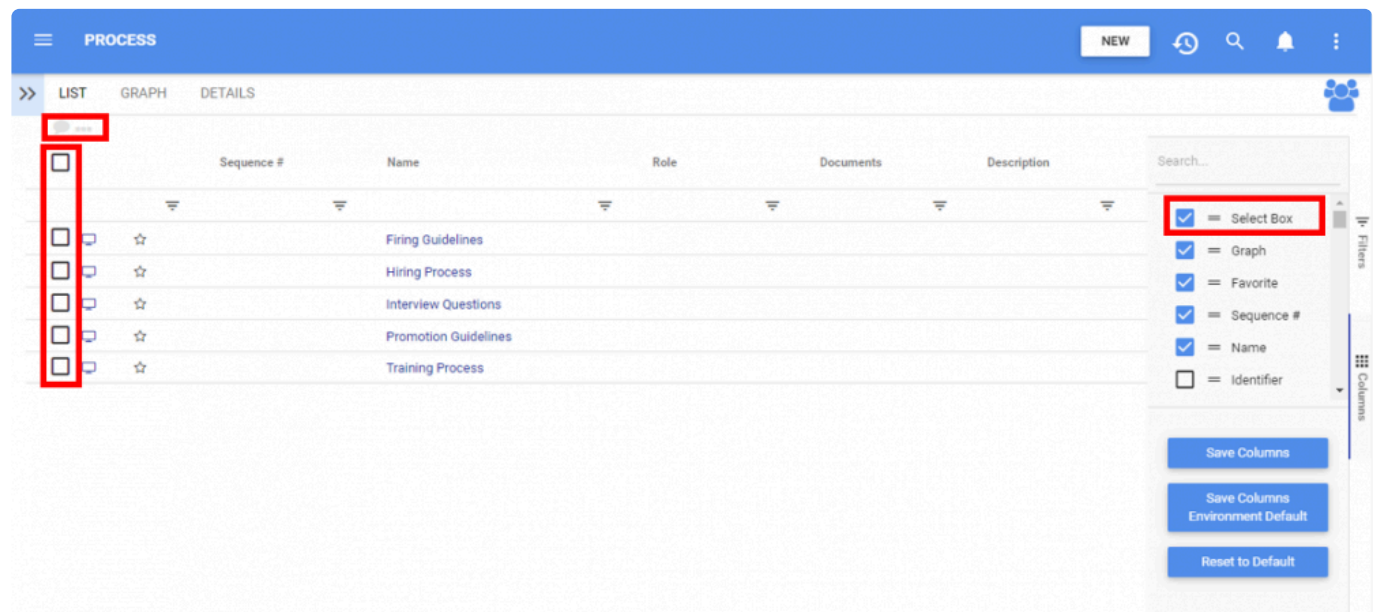
[Mass-Subscribe](#)

[Mass-Collaboration](#)

Customization

To use these features, a user is required to simply check on "Select Box", found in the column box of the list view, to enable a list of check boxes. Once appeared, a user is required to select at least one object to to enable the icons on the page header. A list of options will be available to choose from.

Preview



Mass-Publish

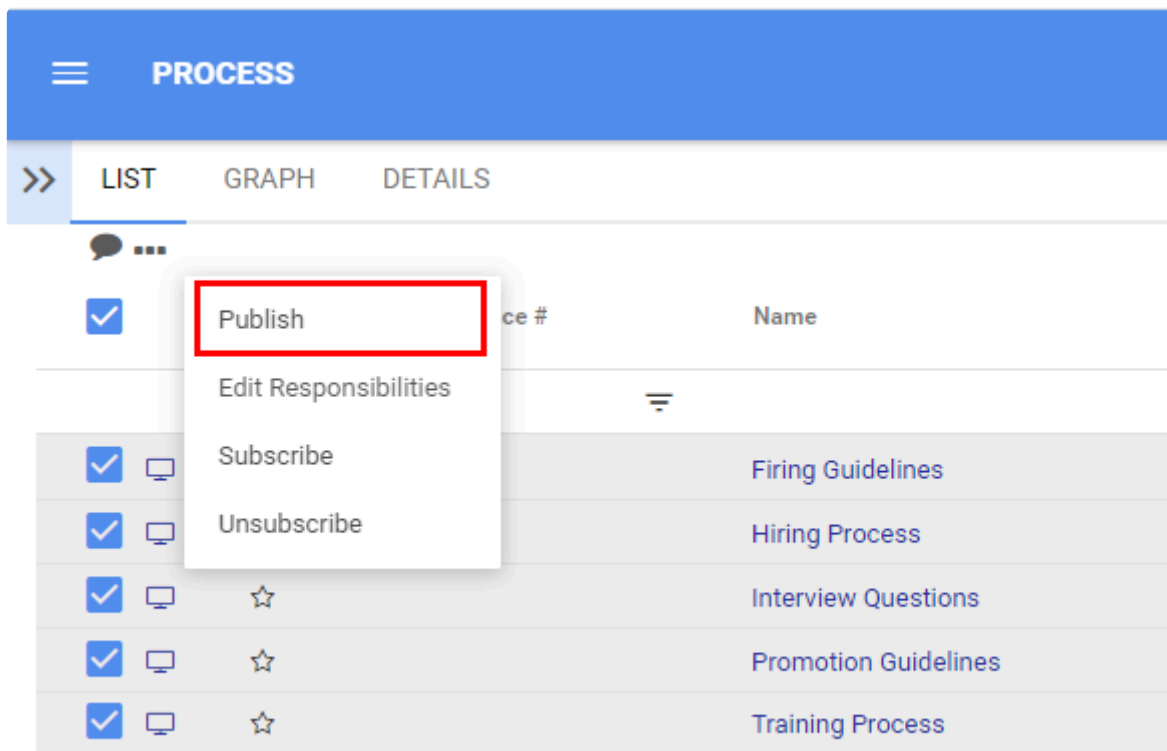
Functionality

The Mass-Publish feature will allow you to publish more than one object through a single interaction.

Customization

It is important to note that all objects selected will have the same publishing characteristics; once published, the system will require you to choose between publishing the objects as minor or major while the publishing comment will be the same for all selected objects as well.

Preview



Mass-Assignment

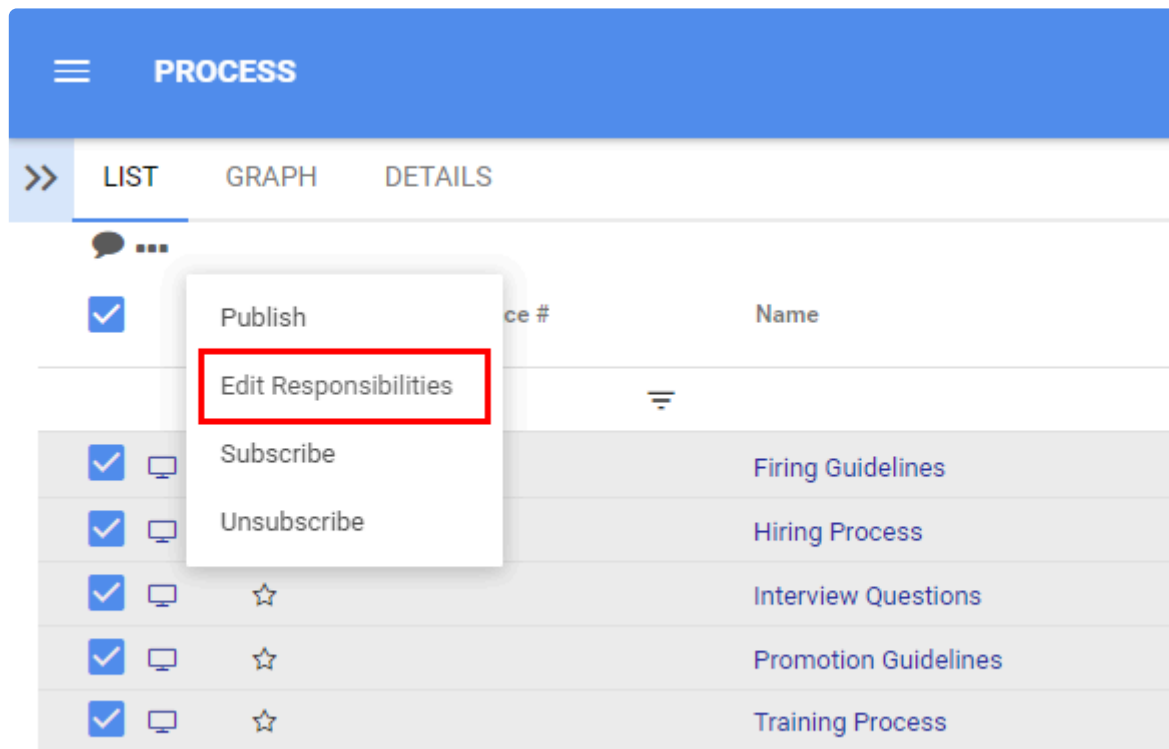
Functionality

The Mass-Assignment feature will allow you to assign the same RASCI for more than one object through a single interaction.

Customization

A RASCI matrix will appear and the user will be capable of adding resources, roles, organization units and assets to assign or edit responsibilities. It is important to note that sets and folders will be ignored if selected as they cannot be assigned RASCI. Additionally, objects which are locked, in review, do not have write permission or are in an approval cycle will also be ignored.

Preview



Mass-Subscribe

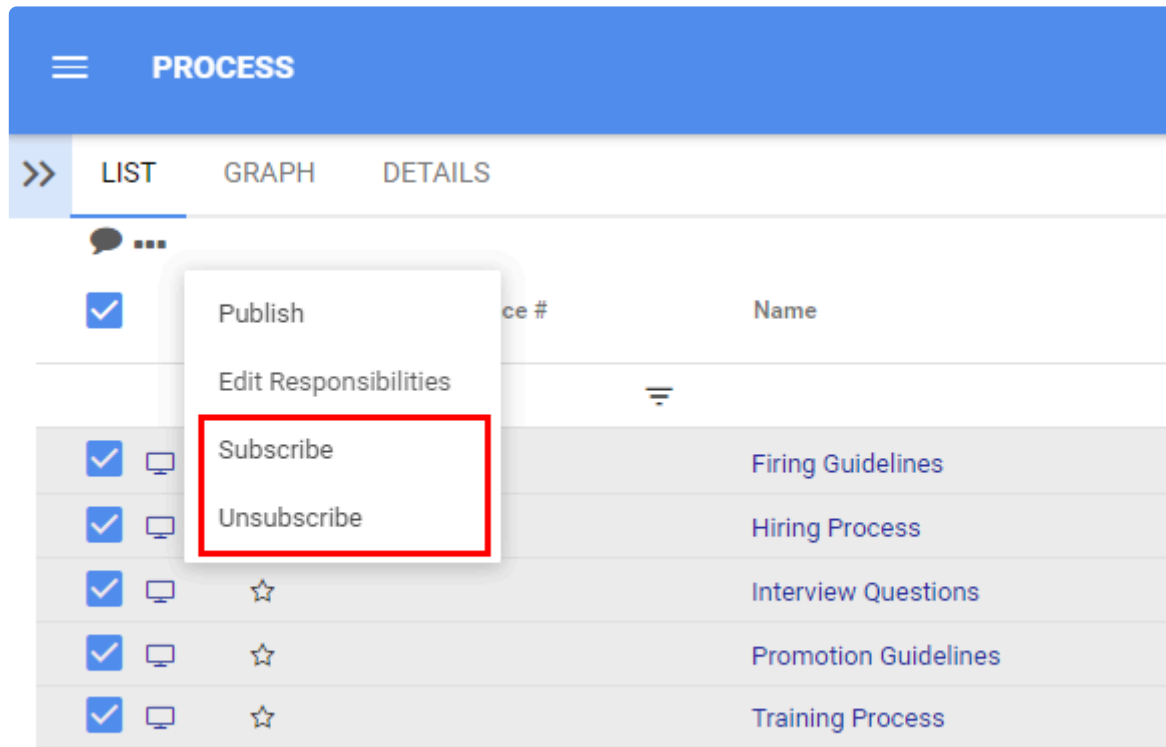
Functionality

The Mass-Subscribe feature will allow you to subscribe/unsubscribe to more than one object through a single interaction.

Customization

When selecting multiple objects whether they were originally already subscribed or not, all non-subscribed objects will be subscribed while the ones previously subscribed will remain the same. The same logic follows for the unsubscribed option.

Preview



Mass-Collaboration

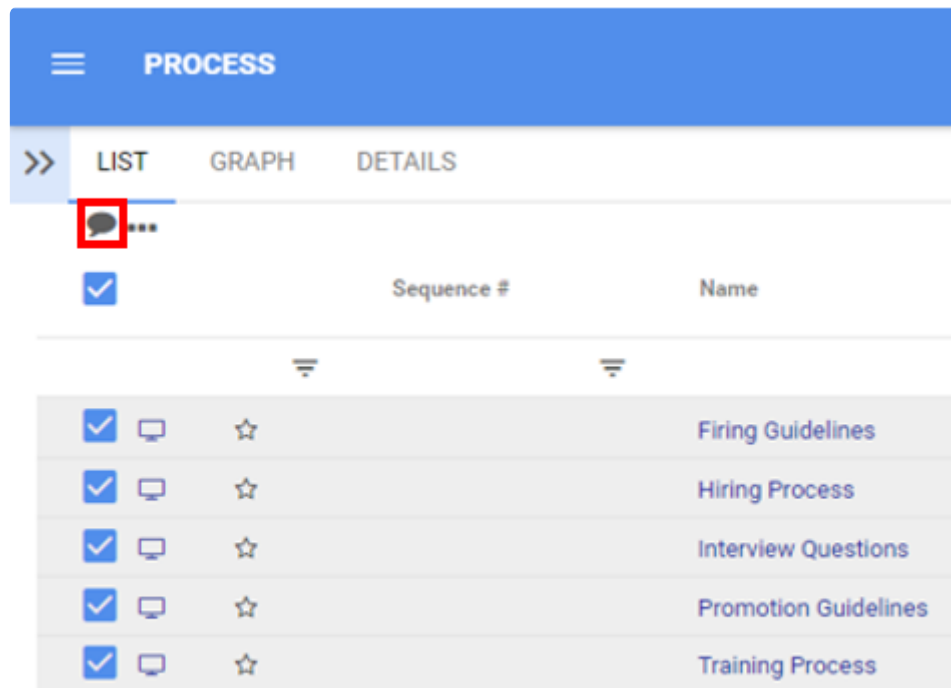
Functionality

The Mass-Collaboration feature will allow you to create a collaboration post for more than one object through a single interaction.

Customization

A group collaboration post will exist in the collaboration module for access, allowing users to see all posts created for all selected objects within that transaction. Unlike other multi-features; this interaction will all be processed in either a single transaction or none; in other words, if more than one object cannot be part of the collaboration post for any reason, the group and the post for all objects will not be created.

Preview



Glossary

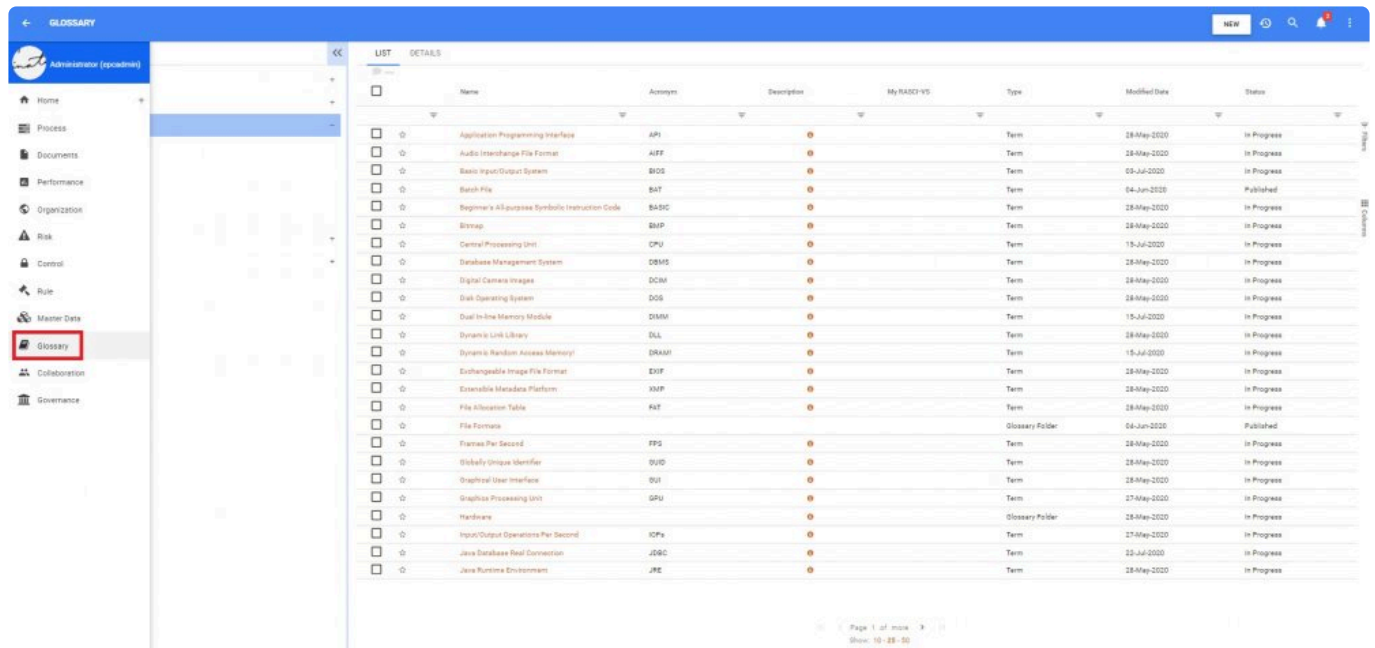
Functionality

The Glossary Module is a terminology module for an organization's entire EPC server. Its purpose is to allow organizations to set company-wide definitions or acronyms to simplify end-user understanding. Similar to a dictionary, this module gathers a company's most used terms and acronyms to set a vocabulary standard to avoid confusion and misunderstandings.

Like any other module, the Glossary will allow users to navigate between list view and details view, including their respective features available in each tab; however, there will not be any mapping in this module.

This module will sync with the [link to glossary](#) feature which will be explained in the following section.

Preview



	Name	Acronym	Description	My RADCI VS	Type	Modified Date	Status
<input type="checkbox"/>	Application Programming Interface	API			Term	28-May-2020	In Progress
<input type="checkbox"/>	Audio Interchange File Format	AIFF			Term	28-May-2020	In Progress
<input type="checkbox"/>	Basic Input/Output System	BIOS			Term	03-Jun-2020	In Progress
<input type="checkbox"/>	Batch File	BAT			Term	04-Jun-2020	Published
<input type="checkbox"/>	Beginner's All-purpose Symbolic Instruction Code	BASIC			Term	28-May-2020	In Progress
<input type="checkbox"/>	Bitmap	BMP			Term	28-May-2020	In Progress
<input type="checkbox"/>	Central Processing Unit	CPU			Term	19-Jul-2020	In Progress
<input type="checkbox"/>	Database Management System	DBMS			Term	28-May-2020	In Progress
<input type="checkbox"/>	Digital Camera Images	DCIM			Term	28-May-2020	In Progress
<input type="checkbox"/>	Disk Operating System	DOS			Term	28-May-2020	In Progress
<input type="checkbox"/>	Dual In-line Memory Module	DDMM			Term	15-Jul-2020	In Progress
<input type="checkbox"/>	Dynamic Link Library	DLL			Term	28-May-2020	In Progress
<input type="checkbox"/>	Dynamic Random Access Memory	DRAM			Term	15-Jul-2020	In Progress
<input type="checkbox"/>	Exchangable Image File Format	EXIF			Term	28-May-2020	In Progress
<input type="checkbox"/>	Executable Metadata Platform	XMP			Term	28-May-2020	In Progress
<input type="checkbox"/>	File Allocation Table	FAT			Term	28-May-2020	In Progress
<input type="checkbox"/>	File Formats				Glossary Folder	04-Jun-2020	Published
<input type="checkbox"/>	Frames Per Second	FPS			Term	28-May-2020	In Progress
<input type="checkbox"/>	Globally Unique Identifier	GUID			Term	28-May-2020	In Progress
<input type="checkbox"/>	Graphical User Interface	GUI			Term	28-May-2020	In Progress
<input type="checkbox"/>	Graphics Processing Unit	GPU			Term	27-May-2020	In Progress
<input type="checkbox"/>	Hardware				Glossary Folder	28-May-2020	In Progress
<input type="checkbox"/>	Input/Output Operations Per Second	IOPS			Term	27-May-2020	In Progress
<input type="checkbox"/>	Java Database Real Connection	JDBC			Term	22-Jul-2020	In Progress
<input type="checkbox"/>	Java Runtime Environment	JRE			Term	28-May-2020	In Progress

Link to Glossary

Functionality

This new feature provides tool-tip pop-up definitions to terms and acronyms found in texts in all of EPC. When editing a text, a user can simply link a text to a term that can be found in the glossary module to provide further details or insights on its meaning, providing better understanding to users.

Customization

To access the feature, a user highlights a desired text within a text box and right-clicks. A drop-down menu will appear showing the link-to-text feature; in turn, this will enable a window to search and select a preferred term found within the glossary module. Once this is done and the initial text box is saved, the details page will present the entire text with the term highlighted. When the cursor crosses over the linked text, a pop-up will appear showing the linked definition.

Preview

02.02 Quality Management [Draft]

Identifier: 7666

Description

The World Health Assembly is the supreme decision-making body for WHO. It generally meets in Geneva in May each year, and is attended by delegations from all 194 Member States. Its main function is to determine the policies of the Organization. The Health Assembly appoints the Director-General, Board, which it instructs in regard to matters upon which further action.

World Health Organization

The World Health Organization is a specialized agency of the United Nations responsible for international public health. The WHO Constitution, which establishes the

Show More

- Responsibilities
- Custom Attributes
- Subprocesses
- SIPOC
- Versioning
- Impact

Compliance with Digital Signature

Functionality

EPC supports the 21 CFR requirements mandated for digital signature of data. Across the solution, you can now leverage fully encrypted digital signature which is compliant with the criteria that electronic records, electronic signatures, and handwritten signatures to be trustworthy, and reliable.

These new capabilities allow users to sign-off their data and document to prove authorship, finalize their contents, and secure against future tampering.

Preview



Underwrite Policy and Modify Agreement

Standard Operating Procedure

Approved by

Signer: Claire Lu
Thu Jun 18 15:04:03 GMT 2020
Location: 19.23.54.01

Signer: Elena Miller (e.miller)
Thu Jun 19 09:04:02 GMT 2020
Location: 102.113.96.107

Signer: Oscar Crofer (o.crofer)
Thu Jun 19 16:14:12 GMT 2020
Location: 92.95.26.176

Signature Image Management

Functionality

You can now upload and authenticate your signature securely for all your GXP compliance. That will allow users to see their own signatures upon approval of new versions. Add customizable approval signatures, such as an image of your physical signature or an engineering seal

Preview

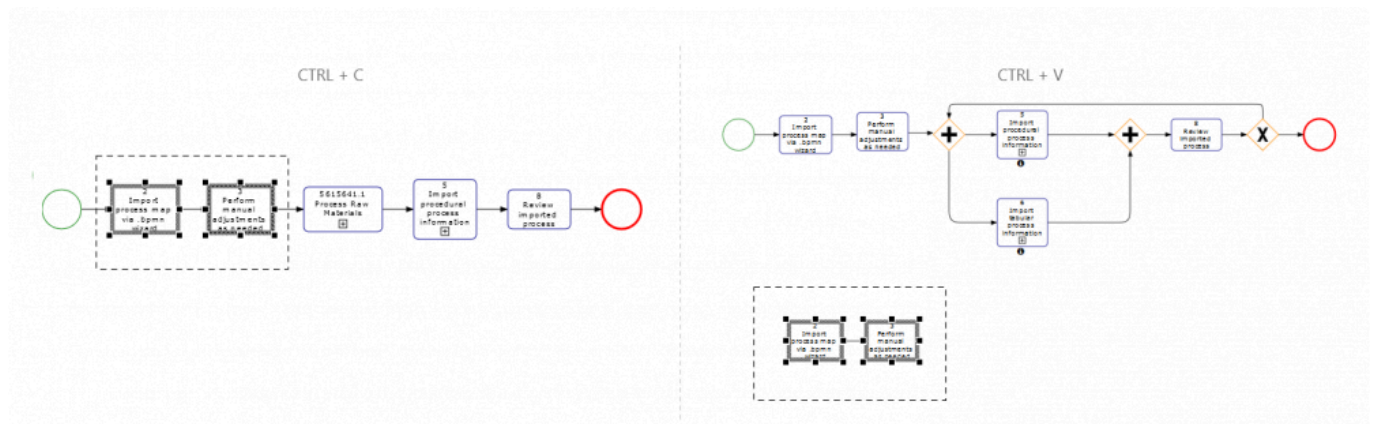


Copy/Paste Across Process Maps

Functionality

Previously, copy/paste was limited to the same map. EPC now supports the ability to copy/paste flow objects across maps. If you want to duplicate the actions of flow objects inside the graph edit mode to another process, you can now copy and paste them. For example, if you are building a process with conditions of a **if yes** side and a **if no** side, instead of creating both actions from scratch, you can simply copy both action and paste it in a new process.

Preview



Document Parser

Parse, convert and upload PDF/Word text-based documents directly into EPC content. Convert your current standard operating procedures, user manuals, training guides and work instructions into process maps including all related information as well (roles, systems, regulations, glossary terms, KPIs, risks or controls). Also useful for converting external law and regulatory documentation from PDF sources (e.g. FDA, FAA, SOX, NRC, ISO, etc.) into EPC libraries as well.

This parsing capability simplifies data migration from legacy documents and shortens the path towards full data and process digitalization.

1. The parser starts scanning the document and breaking it in individual sections and rearrange them into a standard representation.

Doc. No.: SOP-7041381
Global Operating Procedure

Version: 1.0
Effective Date: 01-Mar-2018

GOP: Quality Audit Process

4 Procedure

4.1 Audit assignment:

Audit Head

The Audit Head or designee, in collaboration with the Audit Planning team assigns audits to Lead Auditors based upon the audit type and the auditor's qualifications, expertise and geographical location. Assigned Lead Auditors must not have direct responsibility for the areas being audited, must have enough independence and must not have any conflict of interest. Any of these conflicting situations must be highlighted to the Audit head before the audit.

4.1.1 Monitoring Action Plan Implementation:

FURP

The FURP is responsible for monitoring the timely implementation of committed CAPA. The FURP reminds the QARP of overdue Actions. Actions are considered overdue if not implemented by the due date entered in AQWA A. If a CAPA is not completed within 30 days after its initial or revised due date, the FURP escalates this to the responsible Audit Head and QA Head. Progress of Action Plans for all Audits with outcome "Unsatisfactory" must be closely monitored for closure by the GCA Audit team or by the Global Compliance and Audit Functions (NTO, GDQ, Alcon).

4.2 Audit scheduling and announcement:

Lead Auditor

The Lead Auditor determines the number of audit days needed based on the scope of the audit and on the characteristics of the audit target. The Lead Auditor is responsible for contacting the auditee to verify appropriateness of audit scope/purpose and establish audit dates. Routine audits must be executed within their defined mandatory auditing period however based on quality risk assessment outcome the audit could be moved forward. Upon Auditee confirmation of the audit date(s), the Lead Auditor informs the Audit Planning team.

4.2.1 Document review:

Lead Auditor

The Lead Auditor coordinates the review of documents, including those received from the site, as well as the relevant Modules and Directives of the Quality Manual, the applicable Health Authority Regulations, the GMP Audit related standards and other related documents, e.g. the previous audit reports and action plans, the list of open items, etc. For internal sites, Compliance Alerts and Health Authority inspection history including findings, responses and CAPA should be reviewed. For external sites, that supply the US market, a search should be performed using the US FDA website to determine if a warning letter has been recently issued.

4.3 Audit preparation:

Lead Auditor

The information contained in the AQWA A system under "Site" (e.g. site address), "Target" (e.g. target categories for the sites) and "Audit" (e.g. change request details) will assist the Lead Auditor in preparing the audit. The Lead Auditor contacts the affected Functions and business to ensure appropriate products, programs/trials and processes

2. The algorithm interprets the data based on the parsing rules and data tags set by editors for each of EPC's data objects (Processes, Master Data, Risks, Controls, Documents, Organization, Roles, Asset, Rules, and Glossary terms).

Doc. No.: SOP-7041381
Global Operating Procedure

Version: 1.0
Effective Date: 01-Mar-2018

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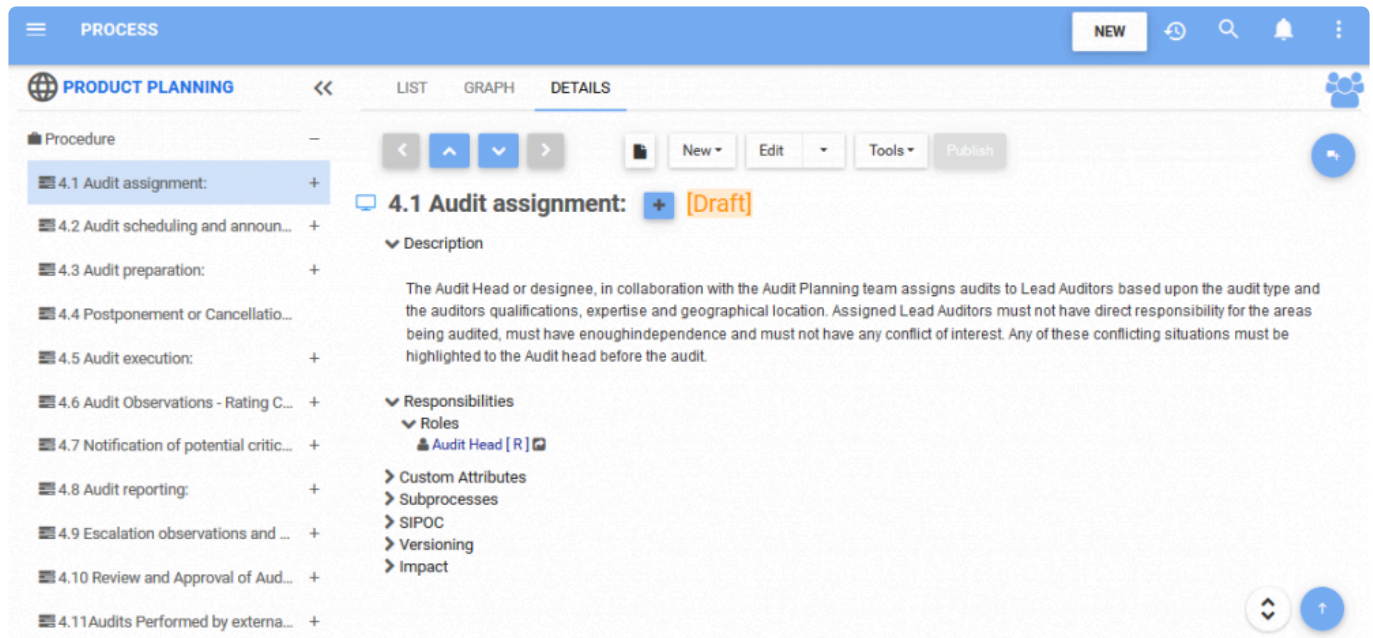
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Defined Labels

Process Set Selected Label	Remove
Process Selected Label	Remove
Role Selected Label	Remove
Sub Process Selected Label	Remove
Role Selected Label	Remove
Procedure/Description Selected Label	Remove
Procedure/Description Selected Label	Remove
Procedure/Description Selected Label	Remove

3. The parser then migrate the data into EPC's matching objects. This migration will automatically build all associations between objects (e.g. responsible role, used rule, etc.); it also includes text formatting style and images.



Re-Use | While the parser is a powerful tool to migrate new content it can also be used to update existing content in EPC.

By using a parsing your document into EPC, your business can benefit in many ways, including:

- Removing the need for data entry, thereby saving you time and money
- Eliminating duplication errors
- Improving the speed and process of data migration
- Removing the need for manual organization

Map Page-Break Canvas

Functionality

In order to improve process map printing and process map appearance in generated documents (e.g. SOPs) modellers can now display page limits on the map editing canvas and design their maps or rearrange flow objects within its limits.

Upgrade Note: It is recommended to set your **Default Page Orientation & Size** from the Environment Admin Setting and maintain that standard throughout the organization

Preview

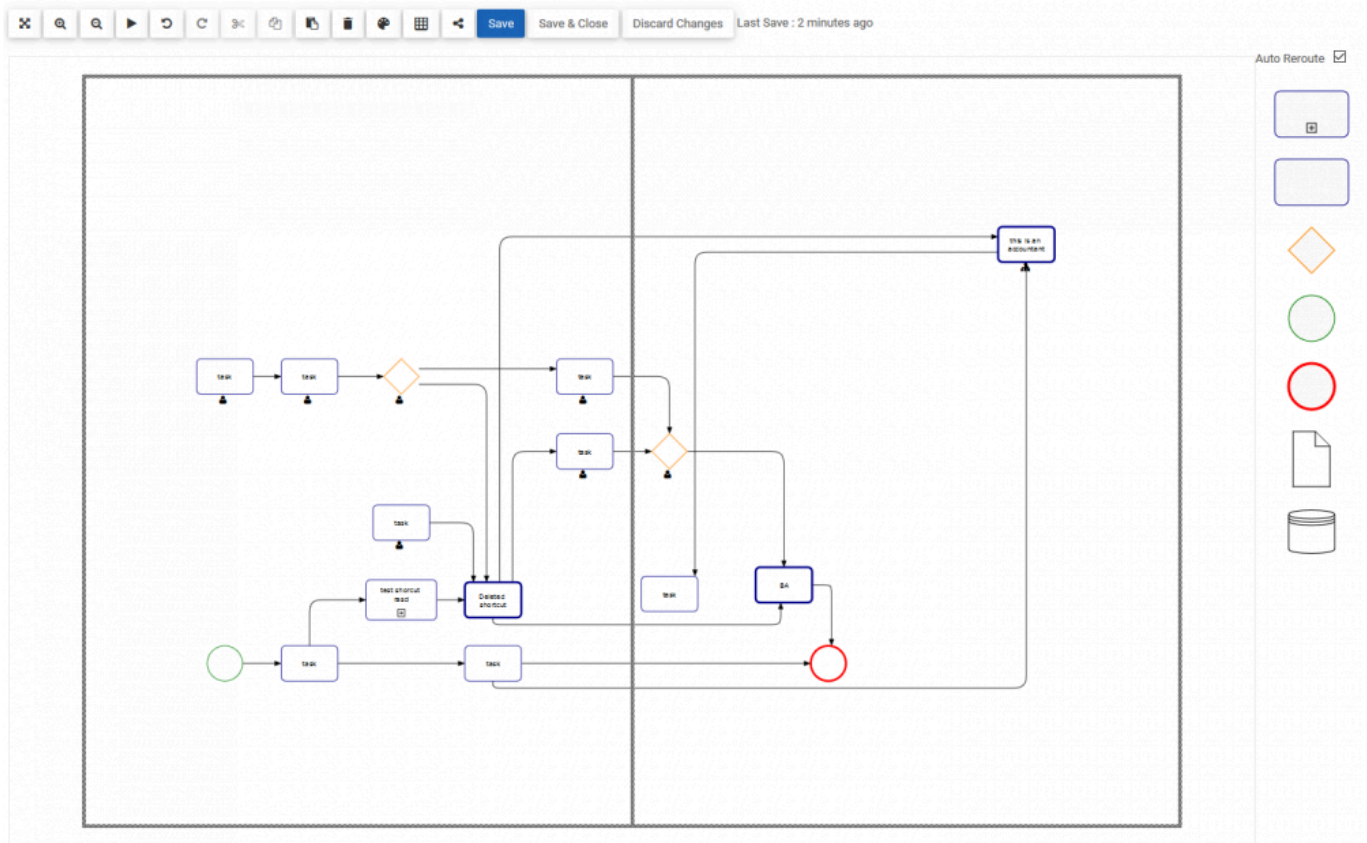
Environment Admin Page

Default Page Orientation & Size

LANDSCAPE

A4

Graph Edit Mode



Quick Form Process Creation

Functionality

People usually have trouble getting started with process mapping because they don't know where to start: they don't know which business process to work on first, and they don't the basic concept of process modelling.

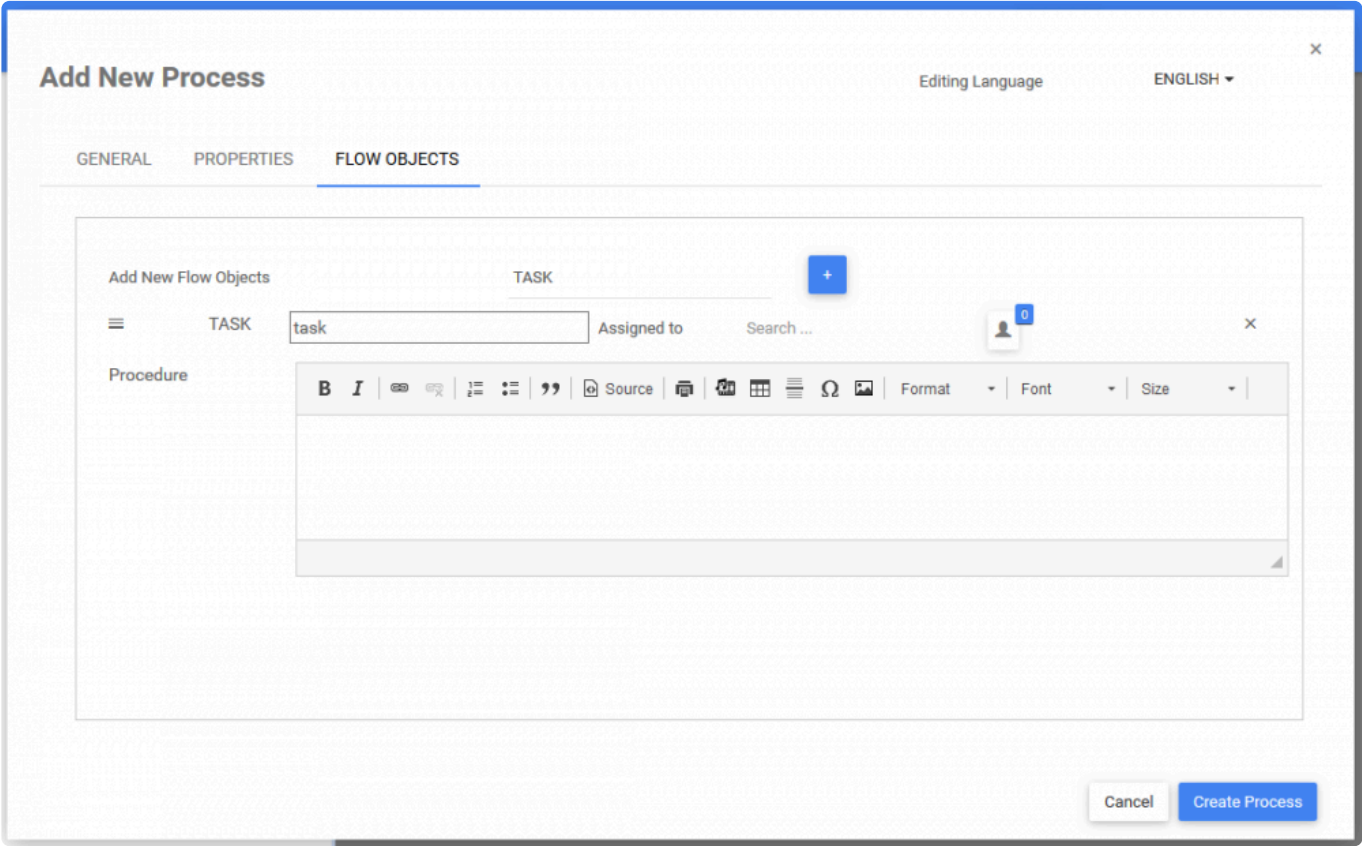
To reduce the complexity of process mapping in your organization, EPC Webapp now allows users who aren't familiar with BPMN methodology's best practices to create flowobjects, write a description and associate roles right from the details page of a new process.

This component allows user to define:

- the type of flowobject: start event, task, gateways, subprocess, or end event
- the description of the flowobject

- the role responsible for that flowobject

Preview



FEATURE ENHANCEMENTS

The following major new enhancements and capabilities have been introduced in the 12.1 release.

[Creation of Shortcuts in Swimlane](#) | While mapping in swimlane mode users can now add shortcuts to existing processes and existing tasks from other processes to enhance map creation. Previously this feature was limited to mapping in flatmap mode

[Artifacts added to Audit & Compare](#) | Artifacts are now included within audit trail and compare features (similar to other flow-objects).

[Object Book Enhancement](#) | EPC allows users to generate documents out of their EPC data using various standard and customizable templates. New options are now available in order to enhance the quality and extensibility of the books' content: improved process maps dimensions and page fit, insertion of images according to preset dimensions, insertion of RACI matrices, addition of a list of used acronyms, exclusion of minor versions from audit trail, and display of input and outputs on maps.

[Create Environment Default List View](#) | Admins can now customize which columns appear within list view as environment default for all their users. Users can still customize their views as well and restore to default view at any time.

[Tool-tip on Tree & List Views](#) | When names are too long, they can be hidden in Tree and List views. Now users can hover their mouse over the name to easily view the full name of the object

[Requirement & User Acceptance Test on Task](#) | Previously only available on processes, Requirement and User Acceptance Test fields are now available on all flow objects as well. This allows you to capture the specific requirements and UATs per task when doing system analysis for development, configuration, deployment and testing. (Use this information in system req and UAT books)

[IPL Tree Selector](#) | Navigate through the process hierarchy when creating an IPL, provides a user-friendly way to select which process you want to link to when you do not know its name (similar to all other assignment hierarchies)

[Sequence Order in RASCI](#) | Edit RASCI assignment matrix is now sorted by flow object sequence number to simplify the assignment effort

[View Publish Comment in Version History](#) | Easily view a user's comments recorded during publishing of objects from all past versions directly in the version history

[Minor Publish Does not Update in Version History](#) | The review date is updated only when a major version is published, no longer the case for minor versions. Minor version updates like a spelling mistake will no longer reset your automated next object review date.

[Preview Document in Edit Form](#) | Users can now preview their documents directly from while on the edit form in order to better know which document they are adding or replacing

[Document Properties in Details Page](#): | Users can now see the name, size, and extension of the file uploaded as a document in the document module

[Widget to Filter Categories](#) | Users can now create general widgets that show information classified by custom categories. (Eg. Policies, or eForms)

[Improved Details Page Layout](#) | The details page layout has been optimized to improve readability and simplicity. We reduced wasted space, better organize subsection structure and naming conventions, further optimized the layout for mobile devices and remove subsections whenever they are empty.

[Tree Selector Enhancements](#) | Users can select object form the left hand side of the tree selector popup. In addition, users can save a click by using the “Add + Close” button within the tree assignment selector pop-up window upon selecting an object to assign. Users still have the ability to use the “add” multiple as well before closing the pop-up assignment window.

[View Process Name in Edit Graph Mode](#) | Users can easily know which process they are currently viewing with the name added directly above the graph

[Task duration used in Simulation](#) | The default duration time entered per task within the analysis module will now be included as the default within the BPMN2.0 simulation. Users can still run what-if scenarios by changing this information directly within the simulator.

[Map Annotations Improvements](#) | To provide for condensed legible maps, we Reduced the size of all ANNOTATIONS and MATERIALS by removing extra wasted white space and hiding the [X] to close an annotation or material and only display it with mouse roll-over

[Easier Change of Preferred Process Map](#) | Editors can now easily opt to have the preferred map style (flatmap or swimlane) of process they are working match the preference of their environment.

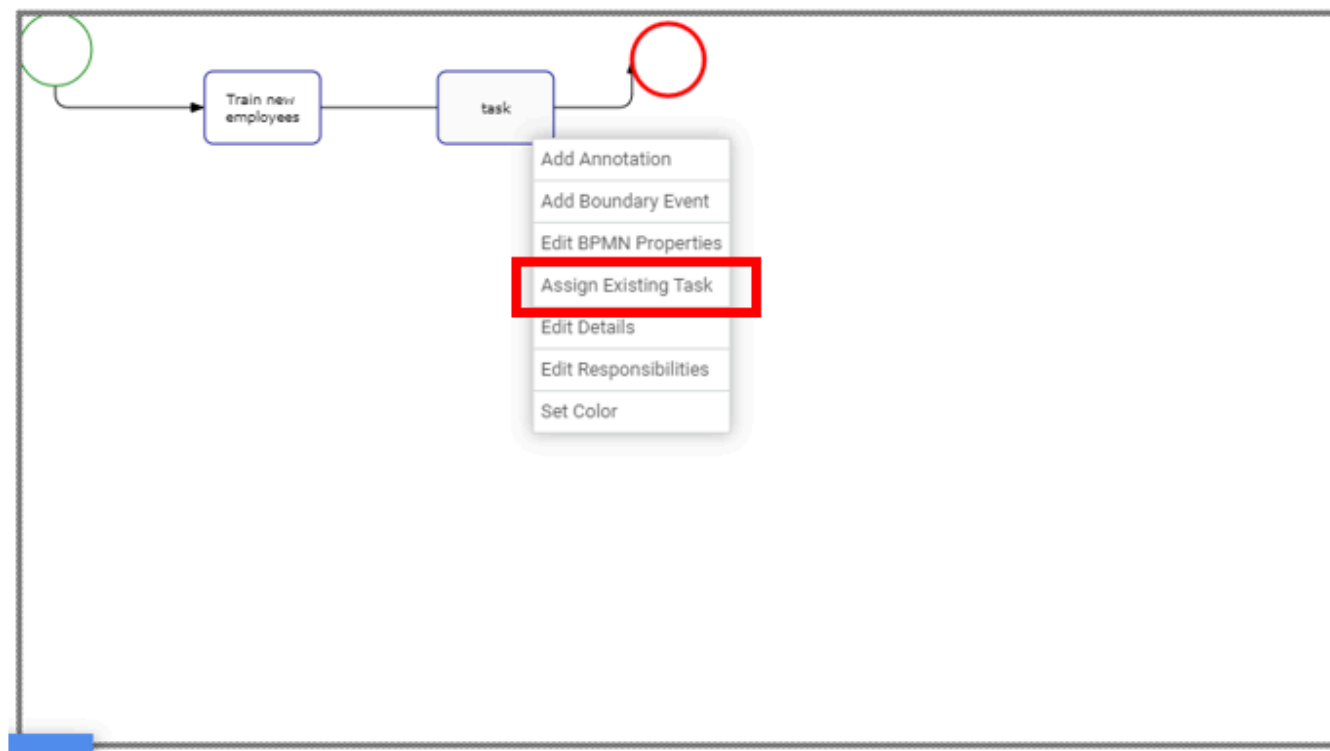
[Events & Gateway Annotation Settings](#) | In order to offer users more flexibility on how to display process maps and which icons or annotations to show and hide, users can now select icons and annotations for gateways and events separately. This setting was previously common to both events and gateways.

[UI in Romanian](#) | EPC's user interface is now available in Romanian

[Performance Enhancements](#) | EPC v12.1 bring major performance improvements and enhancements to multiple areas and features of the webapp. These new improvements ensure an ameliorated and more seamless experience for end users as well as users in edit mode.

Swimlane Mapping Shortcuts

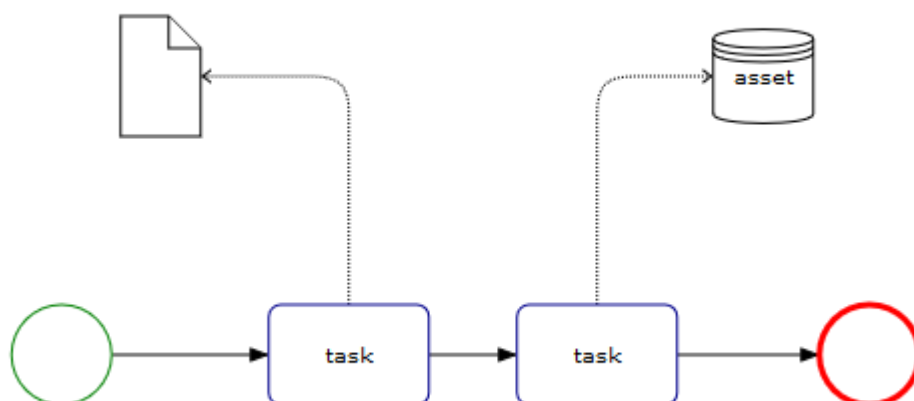
While mapping in swimlane mode users can now add shortcuts to existing processes and existing tasks from other processes to enhance map creation. Previously this feature was limited to mapping in flatmap mode



Artifacts as Flow Objects

Both associated document and datastore are now managed as flowobjects in EPC. The new addition includes ability to:

- Compare different versions of associated artifacts within their respective process,
- Include inputs/output flow to your artifacts and have a better understanding of its history
- Export & import document & datastore as bpmn flow objects to other applications



Object Book Enhancement

Objects book are created by a content editor to generate word & pdf documents such as an SOP document. These objects book at runtime replaces tags found in a template with actuals data from EPC Webapp. The result of these template can be used to provide a summary of activities necessary to complete task, define policies, procedure and standards you need in your operations. V12.1 provides the following new enhancements that an editor can include in a object book.

1. A tag to include input & output material labels within book map images. This is useful for users to track transition decision paths within maps inside books.

Inputs & Outputs

Flow Object	Flow Object Type	Input	Output
Approve Purchase	TASK	Purchase orders	Purchase approval
Check for purchase invoice default	TASK	Acquisition request	Strategy review schedules and documentation
Check purchase invoice default	TASK	Authorized change plans	Acquisition request
event	END	Invoice [approved]	
event	START		Authorized change plans

2. Historically, entire details of all flow-objects (including subprocesses) were provided at one level before providing the details of the subprocess content. Now this new tag allows the system will go inside the subprocess and provide the details of the tasks in the subprocess then go back up the level to complete.

Flow Objects Information of Parent & Children Level Processes

Type	Sequence #	Name	Status
START	1	event	IN_PROGRESS
TASK	2	Check purchase invoice default	IN_PROGRESS
TASK	3	Check for purchase invoice default	IN_PROGRESS
TASK	4	Approve Purchase	IN_PROGRESS
SUBPROCESS	5	Approval Purchase	IN_PROGRESS
GATEWAY	6	gateway	IN_PROGRESS
TASK	7	Trigger payment	IN_PROGRESS
END	8	event	IN_PROGRESS
START	5.1	event	IN_PROGRESS
TASK	5.2	Perform manual adjustments as needed	IN_PROGRESS
GATEWAY	5.3	gateway	IN_PROGRESS
SUBPROCESS	5.4	Import tabular process information	IN_PROGRESS
SUBPROCESS	5.5	Import procedural process information	IN_PROGRESS
GATEWAY	5.6	gateway	IN_PROGRESS
TASK	5.7	Review imported process	IN_PROGRESS
GATEWAY	5.8	gateway	IN_PROGRESS
END	5.9	event	IN_PROGRESS

3. A tag to include only the major published versions of an EPC object within the audit trail section of your SOP (exclude minor versions)

Major Published Version

Version	Status	Comment
1.0000	PUBLISHED	No comment
2.0000	PUBLISHED	Reviewed the necessary changes for this process.

4. A tag to include both the major minor published versions of an EPC object within the audit trail

section of your SOP

Major & Minor Published Version

Version	Status	Comment
1.0000	PUBLISHED	No comment
2.0000	PUBLISHED	Reviewed the necessary changes for this process.
2.0100	PUBLISHED	Approved minor change
3.0000	PUBLISHED	Reviewed the necessary major changes for this process.
3.0100	PUBLISHED	Reviewed the necessary minor changes for this process.

5. A tag to incorporate any term or acronyms associated to an EPC object

Terms & Acronyms

Type	Name	Status
TERM	workplace	IN_PROGRESS
TERM	safety	IN_PROGRESS

6. A custom tag to set a max width attribute within your book templates so that the images shrink to fit correctly based on where they are inserted in the document (e.g. Inside a cell in a table)

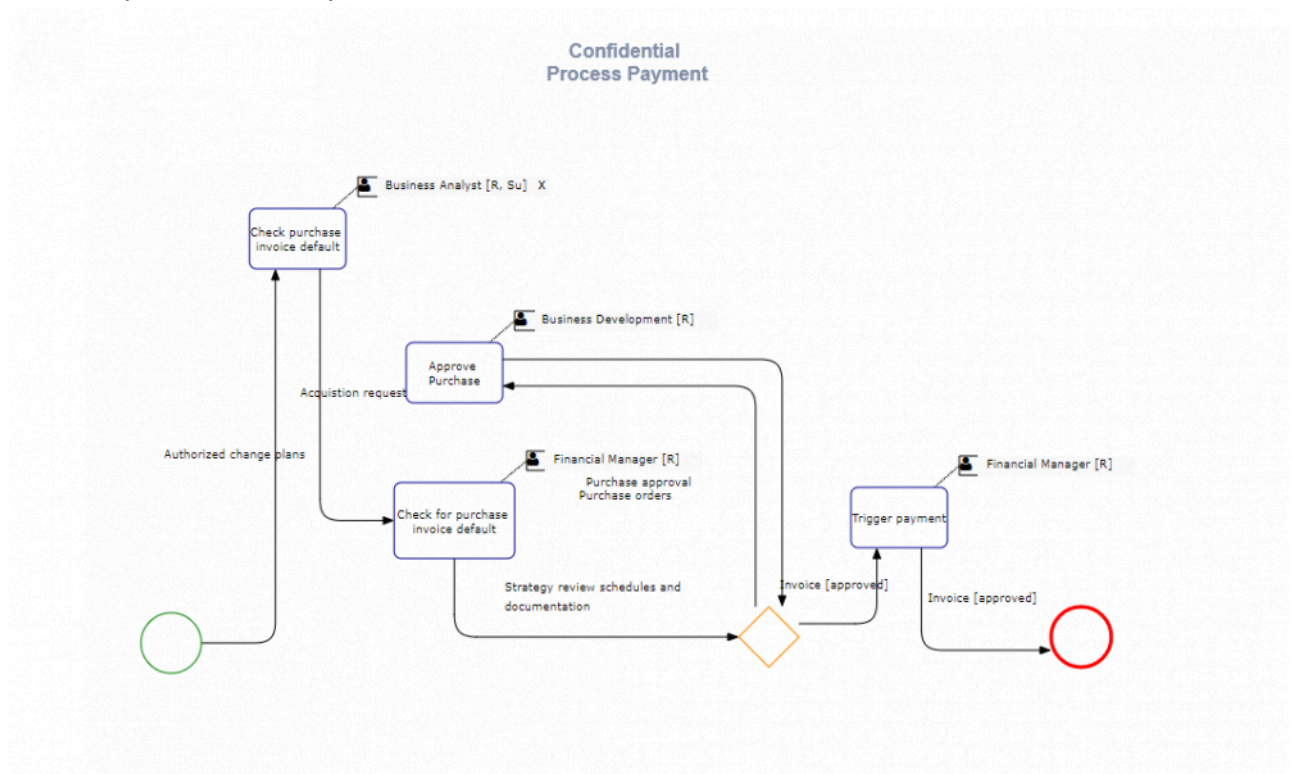
Description

Why are workplace inspections important?

Workplace inspections help prevent incidents, injuries and illnesses. Through a critical examination of the workplace, inspections help to identify and record hazards for corrective action. Health and safety committees can help plan, conduct, report and monitor inspections. Regular workplace inspections are an important part of the overall occupational health and safety program and management system, if present.



7. A custom tag to set & retrieve the perfect height & width of a process map and to improve the overall appearance of a map in a generated document. In addition, we added an option to include input & output material labels within book map images. This is useful for users to track transition decision paths within maps inside books.



8. A custom tag to retrieve a responsibility assignment matrix (RACI Matrix), which summarize the defining roles and responsibilities in a cross-functional or departmental project

Rasci Matrix of Process Activities

The following is a list of the activities (tasks and subprocesses) conducted within the scope of this process, as well as any roles and/or assets associated to them combined with their RACI assignment.

R: Responsible, A: Accountable, Su: Support, C: Consulted, I: Informed

N.B. The skipping of sequence numbers is intentional.

	Roles		
	Business Analyst	Business Development	Financial Manager
Approve Purchase		R	C
Check for purchase invoice default	A		R
Check purchase invoice default	R, Su	I	
event			
event			
gateway			
Trigger payment	Su, I	V	R

Create Environment Default List View

In List view, EPC now allows admins to set columns as environment default for all their users and to ensure a company standard in respect to their grid view.

>>

LIST

GRAPH

DETAILS

Name	Type	Sequence #	Modified Date		
"Improvement Request" Comments (including Ou	Process		18-Dec-2019		☆
"Publish" Comments	Process		18-Oct-2019		☆
"Send/Reject/Approve Approval & Endorsement"	Process		18-Oct-2019		☆
Endorsement & Approval Boxes + Delegation of A	Process		23-Dec-2019		☆
event	Start		17-Dec-2019		☆
event	End		18-Dec-2019		☆
event	Start		18-Dec-2019		☆
event	End		17-Dec-2019		☆
Mandatory Comments	Process		18-Oct-2019		☆
Req + UAT	Process		18-Dec-2019		☆
subprocess	Process		05-Nov-2019		☆
subprocess	Process		18-Oct-2019		☆
task	Task		18-Dec-2019		☆

Search...

☐ = Org Units
 ☐ = Attributes
 ☐ = Entity
 ☐ = Asset
 ☐ = Control
 ☐ = Risk
 ☐ = Rule
 ☐ = Resource

Save Columns

Save Columns
Environment Default

Reset to Default

Tooltip on Tree & List Views

EPC has implemented a tooltip to expand the entire name of your object when you hover over it in hierarchy tree panel and list.

PROCESS

DEMO

<<

LIST

GRAPH

DETAILS

A01- DPP

+

approvals

B01- Operations

-

02.01 Order to Shipping

+

02.02 Quality Management

+

B02- Corporate Compliance

+

B03- Manage Financial Resources

+

B04- Governance, Risk and Compliance

-

Audit Apps

-

02.02.04 Incident Management

02.02.08 Initiate CAPA

-

02.02.08.7 Action Item Management / Implement Correc...

Audit

Disaster Recovery

-

5 DRM Action Items

Incident Management

-

Sequence #

Sequence #

02.02.02

02.02.03

02.02.01

02.02.08.7 Action Item Management / Implement Corrective Action Plan

LIST

GRAPH

DETAILS

Sequence #

Name

[de] Archived

Role

Documents

Description

My RASCI-VS

Type

02.02.02

Inspect Assem

2

1

Process

02.02.03

Inspect Final P

Process

02.02.01

Inspect R

1

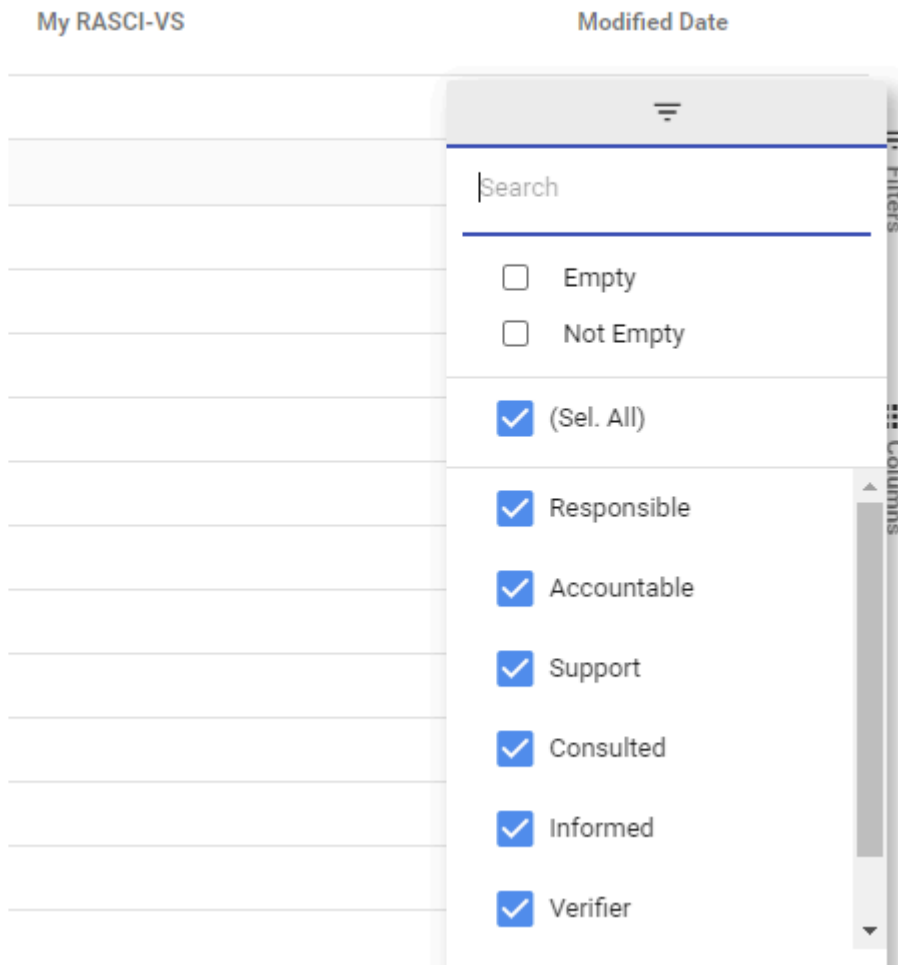
Inspect Final Product

Process

The “My RASCI” column and the “empty/not empty” filter have both been added to list view, adding further options to users when filtering their data.

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Page 32 of 46



Long rules names can now be seen in all their entity on list and map views through tooltips; users will no longer be required to stretch headers or elements in maps to view long names.

LIST					GRAPH	DETAILS
<input type="checkbox"/>			Name	Role	Documents	Description
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	21 CFR §11.10(d)(f)(g) - System must limit access, approvals, and			
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	4.1 Understanding the organization and its context	21 CFR §11.10(d)(f)(g) - System must limit access, approvals, and use to authorized individuals and enforce only permitted sequencing of steps and events		
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	ASDF		4	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	BA-1			
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	BA-2			
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Data accuracy/billing outputs	1		
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Day Limit Always < 150	1		

Requirement & User Acceptance Test On Task

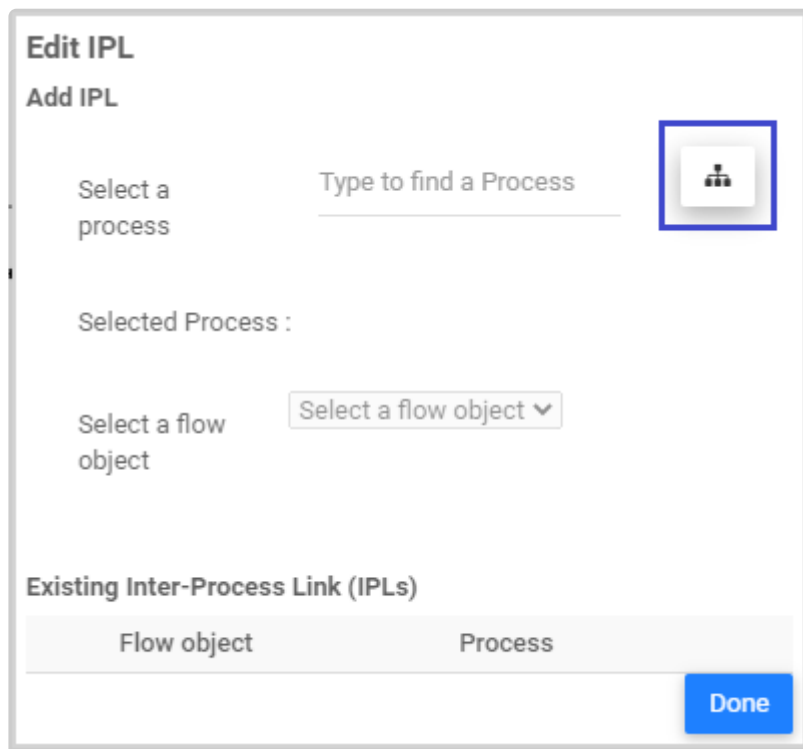
Previously only available on processes, Requirement and User Acceptance Test fields are now available

on all flow objects as well. This allows you to capture the specific requirements and UATs per task when doing system analysis for development, configuration, deployment and testing. (Use this information in system req and UAT books)



IPL Tree Selector

EPC now allows users to easily build Inter-Process Links (IPL) by selecting from tree selector in addition to typing in the name of the object.



Sequence Order In RASCI

In multi RASCI assignment, the responsibilities matrix is now sorted by flow object sequence number providing an enhanced experience and easier usability for process editors.

Flow objects without a sequence number are sorted alphabetically.



View Publish Comment In Version History

EPC Webapp now allows users to get visibility on published comments from past version and see what major changes were made on each version

Simply navigate to the Details page of an object. Expand the Version History table under Properties, the published comments are available in the “Published Comments” column, to view a comment click on the “i” icon.

Artifact as Flow Objects

- Custom Attributes
- SIPOC
- ▼ Versioning
 - Current Version
 - ▼ Version History

Version Number ▼	Status	Published Comment	Author	Date
2.0000	Published	i	Arif Khan (arif)	July 14, 2020 10:36 AM
1.0000	Published		Arif Khan (arif)	July 13, 2020 3:49 PM

- Impact

Minor Publish Does Not Update Review Date

In EPC a review date can be set on all objects in order to trigger a review cycle. The review date is automatically calculated based on a review frequency for each object. The review date is now only updated only when a major version is published; no longer the case for minor versions.

Example:

Version published date: 1-June-2020

Review Frequency set to : 1 year

Before the new change, the review date will be set to 1-June-2021 regardless if the process was published as minor or major version

After the new change, the review date will be set to 1-June-2021 only if the process is published as major. If it is published as minor, the review date will be the date of the last major publish plus the review frequency period

Preview Document In Edit Form

Users can now preview their documents directly in the edit form in order to better know which document they are adding or replacing


Navigate to the Edit page of an object; under the list of associated documents, click on the preview icon to view the content of the document in details.

Which Documents are used?

Select a Document

Type Document Name



Name	Type	Status	
 [Default Template] Process Audit	Template	Published	×

Document Properties in Details Page

Users can now see the name, size, and extension of the file uploaded as a document in the document module

LIST GRAPH DETAILS

Edit
Tools
Publish
Show Published

1.1.1 Sizing-worksheet

▼ File Details

File Type	File
File name	1.1.1 Sizing-worksheet.doc
Size	41.5 KB

> Custom Attributes
> Versioning
> Impact

Widget to Filter Categories

The “My Object” widget now allows users to display objects of one or more categories without the need to select an associated resource or role.

Here’s an example of a widget built to display all processes of category “Automated”

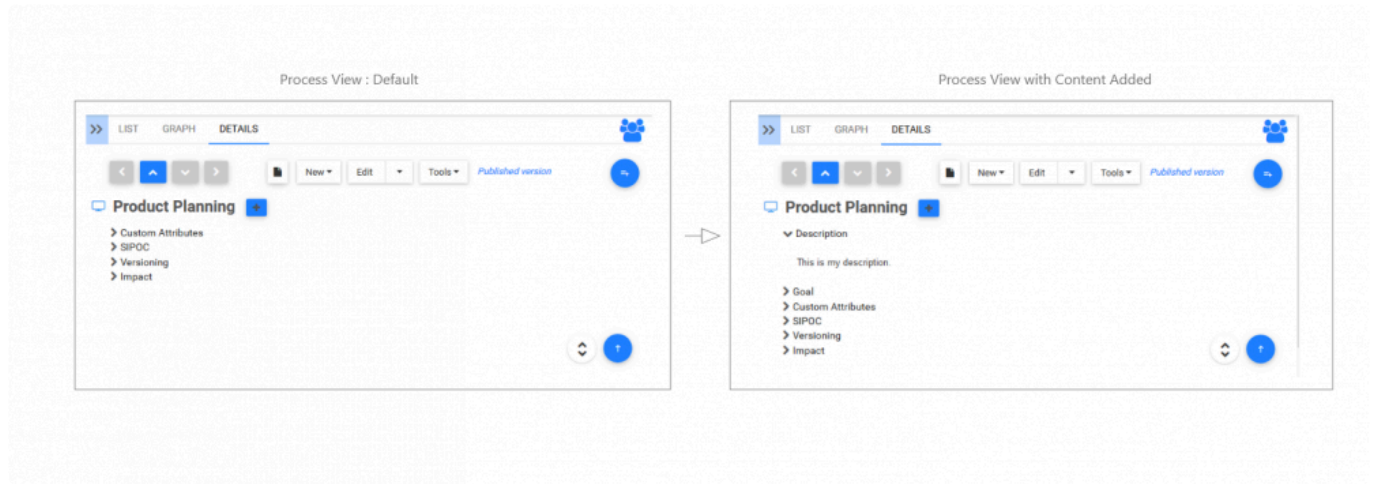
Automated Processes

Name ▲	Type	Subtype	Last Modified
Enter Invoice Into System	Process		09-Jul-2019
Food Establishment Inspection Process	Process		12-Aug-2020
Open Customer Bank Account	Process		12-Aug-2020
Packaging & Shipping	Process		12-Aug-2020

Improved Details Page Layout

EPC improved the layout of our details page and made it cleaner & simpler for everyone to use. Users don’t need to open up every individual section to see if the content is empty, and its more user friendly in Mobile The new changes includes:

- Not showing empty sections in the details page of this object (e.g., goals, unique identifier)
- Displacing the expand to the right side of an object name
- Reordering of sections in details page to filter for any unnecessary contents
- Aligning objects under their respective sections



Tree Selector Enhancements

Tree Selectors are used by content editor when assigning or associating an EPC object to another; they provide a hierarchical view of each EPC module's data hence allowing users to find the object they want to assign through its hierarchy. They are very useful when the editor is not sure of the name of the object or which object to assign.

V12.1 provides the following three new enhancements:

- 1- Tree selectors have two components: the module hierarchy on the left (sets, folders, organization units, etc.) and the content of each hierarchy object on the right (documents, rules, risk, etc.). Previously, users were only able to select content from the right component. They can now also select from the left, the hierarchy tree. For example, if a user wishes to assign an organization unit to a task, she previously had to select the parent of the desired organization unit on the left, then pick the said unit from the list on the right. Since organization units are hierarchy items and appear on the left, she can now directly select it from the left. (applicable to: Organization Units, Objectives, KPIs, KRI's, KCI's, process)
- 2- After selecting an item from the tree or list, users had to click "add" and then click on close in the assignment pop-up. Now when they are done they can simply click "Add & Close" for a quicker way to exist the pop-up
- 3- For easier access to EPC object while assigning, the hierarchy view filter is now set by default to "Current level & below". If the user changes this filter level, EPC will save the change as the new user preference (applicable to that user only)

DEMO

- 01 REPORTING +
- Accreditation Documents +
- Canvas Templates +
- CNSC
- Documents Repository +
- Dubai Municipality Portal - Restaurant Portal +
- Finance -
- Invoicing
- Loan Processing**
- Standard Operating Procedures
- Forms +
- Output Templates +
- Templates +
- User Acceptance Testing (UAT) +

DOCUMENT

Name

Loan Application

Loan-amortization-schedule.xlsx

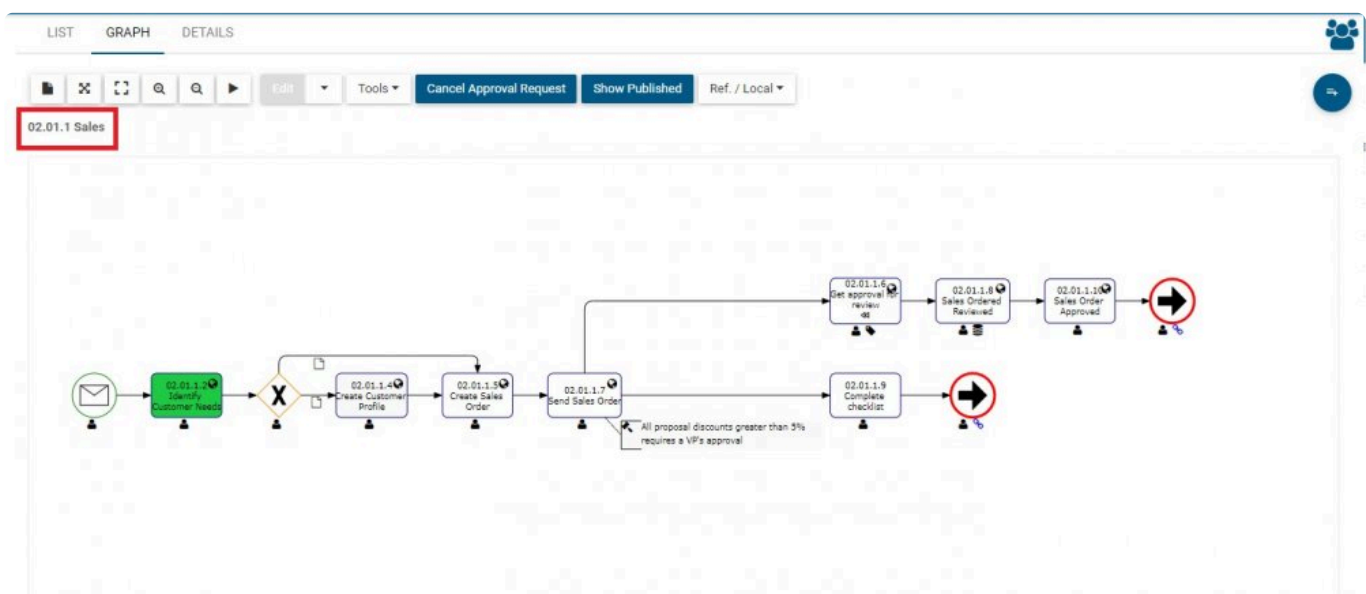
Show: 10 - 25 - 50

Select an object and click "Add"

Close Add **Add & Close**

View Process Name in Edit Graph Mode

The name of the process is now displayed on top of the process map



Task duration used in Simulation

When launching EPC's process simulator, tasks and process processing times are now automatically pre-filled using data previously created by users in EPC's governance module (analysis tab); this will allow users to go through to simulate scenarios at a faster rate while in the past they had to manually enter the processing time value of each flow object.

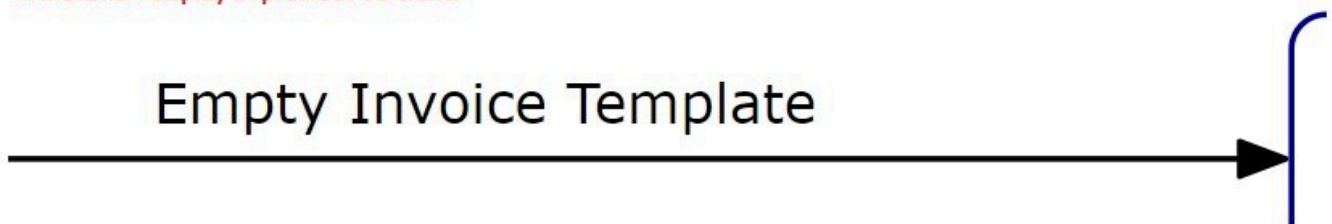
Map Annotations Improvements

The display of annotations on process maps (input/output names, objects annotations, etc.) has been modified to improve the look and feel and provide a better experience. In previous versions, the text of these annotations used to be followed by a relatively large empty space making the whole annotation display too big on process maps.

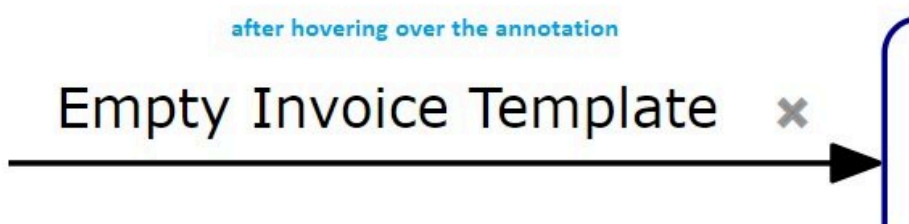
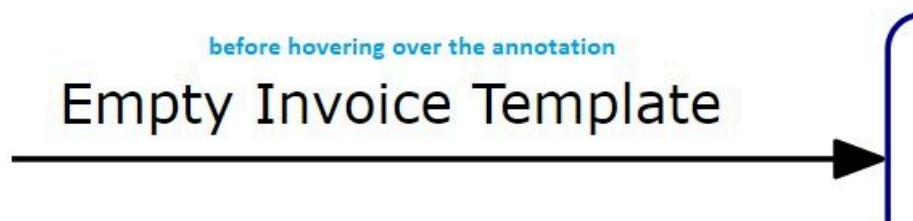
The empty space was removed hence reducing the size of annotations.

To close an annotation users need to hover over the annotation text, an "X" icon will appear, by clicking it, the annotation will close.

Annotation display in previous versions:



Improved annotation display in 12.1



Easier Change of Preferred Process Map

Process maps can be designed in EPC in two styles: **Graph Flowchart** (flatmap) or **Swimlane Flowchart**.

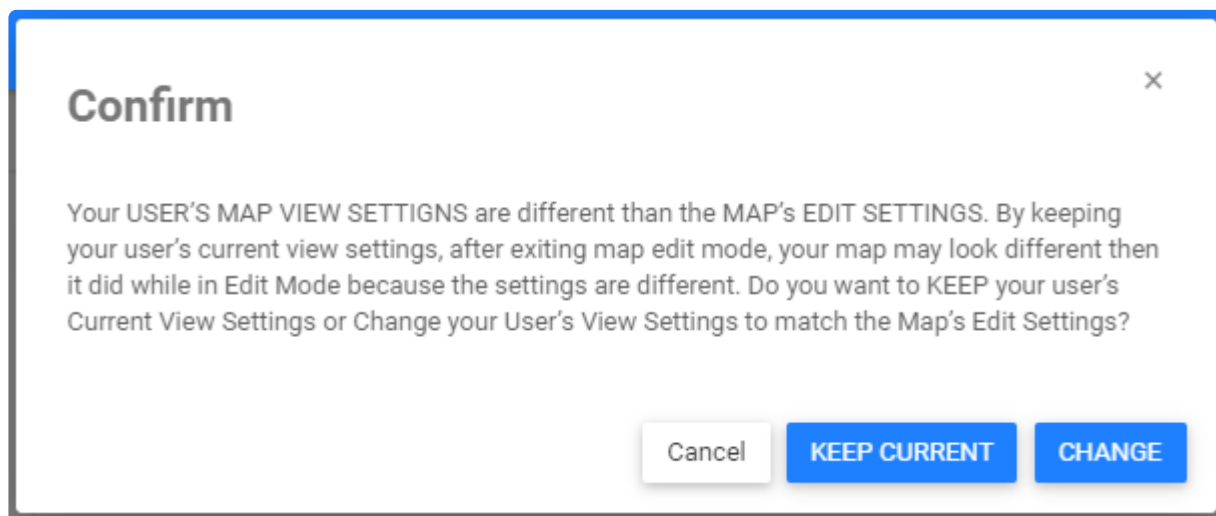
EPC admins can preset one of the two styles as the default preference for all processes. E.G if default is set to “swimlane” when a new process is created it is automatically set to be designed in swimlane.

EPC content editors have however the capability to change this preference on a specific process if they consider that the process will be better designed in a different style.

When the process specific style preference doesn't match the environment default style preset by the admin, the content editor will be prompted with the option to keep the process preference or to match it with the default.

By keeping the process preference, EPC editors can display specific key items that are meaningful to them, filter out any unnecessary information and have a better understanding of a process.

By selecting the option to match, EPC editors will match their view settings to that of the company's map preferences and maintain a standard for process creation.



Events & Gateway Annotation Settings

In order to offer users more flexibility on how to display process maps and which icons or annotations to show and hide, users can now select icons and annotations for gateways and events separately. This setting was previously common to both events and gateways.

Map options



RASCI-VS Filter						+
Icons & Annotations						-
Analysis (6)	NONE	▼	Annotation (1)	ICON	▼	
Assets (1)	ICON	▼	Attributes	NONE	▼	
Boundary Events	NONE	▼	Categories (12)	NONE	▼	
Controls (1)	ICON	▼	Description	NONE	▼	
Documents (1)	ICON	▼	Entities (1)	NONE	▼	
Event Name	NONE	▼	Gateway Name	NONE	▼	
IPL	ICON	▼	Input/Output	ICON	▼	
KCI	NONE	▼	KPI	ICON	▼	
KRI	NONE	▼	Objectives	NONE	▼	

UI in Romanian

In the effort of expanding EPC's international reach and make its user interface available in as many languages as possible, EPC is now available in Romanian in addition to 8 other already existing languages

Users must navigate to profile and locate the "Language". There, they can select Romanian from a list of multiple languages to choose from.

PROFIL

NOU

Preferințe

Mediu

Ville de Quebec

Afișare conținut

Afișează ultimele

Limba

Limbajul interfeței

Romanian

Limbajul conținutului

English

Setări tema

#518eeb

Schimbare temă
Resetare

Coloare font

#28319d

Schimbare culoare
Resetare

Performance Enhancements

EPC v12.1 bring major performance improvements and enhancements to multiple areas and features of the webapp. By modifying technical backend methods used in loading pages and fetching data as well as upgrading libraries used to manipulate and display data. These new improvements ensure an ameliorated and more seamless experience for end users as well as users in edit mode.

As a result, the following will now run faster:

- Document preview
- Objects details page
- Object details page preview pop up (when opening it from another object's page)
- Map rendering
- List search and filtering
- Loading of assignment hierarchy pop ups
- Loading of home pages

FIXED ISSUES

Here are the previous issues that have been fixed per upgrade.

[Issue List 12.1](#)

Issue List 12.1

EPC's V12.1 brings significant improvements on previously known issues that will enhance user experience. The following are this release's most recent fixed issues.

Edit Responsibilities

Previously, RASCI responsibilities were tied to numerous actions to properly add, remove or edit them. In this current version, removing a user's responsibility no longer requires ongoing confirmation requests. This will allow for the editing process to become much less complex and increase its speed.

Documents

Clients who had data created in older versions of EPC (V9 and earlier, when content editors used EPC's the now defunct java modeller) were not able to delete documents of type: "Generated from Template". This issue has been fixed and these types of documents can now be deleted like any other object in EPC.

Process Book Generation

Previously Process book generation failed when the selected process included an expanded subprocess. This issue has been fixed and process books will generate regardless if the subprocess is expanded or not.

Mapping

In earlier versions, the auto-layout feature would not adapt materials and annotations; in other words, it would not revert these back into their original locations. This issue has now been fixed and the auto-layout feature places both materials and annotations back to their proper location as it does to all other mapping elements.

Tables Auto Translation

When descriptions and procedures included tables and content editors switch languages in the edit form, the auto translation features wasn't providing translation suggestions. This issue has been fixed and is working properly as of v12.1

Undo/Redo in Swimlane

While editing in swimlane mode the undo and redo options will no longer wipe out the map.

Shortcut Creation

Creation of a shortcut to a subprocess of the same map used to fail and return errors. This issue was fixed.

Reminders from deleted environments

When an environment is deleted it'll no longer send any reminder as email notification to the users who used to be associated to objects in that environment

KNOWN ISSUES

Here are the current issues that will be fixed in the following upgrades

[Known Issues 12.1](#)

Known Issue List 12.1

E-Signature

During an approval cycle with eSignature required, EPC generates an approval document for approvers to review. This document can be previewed by clicking on the “preview icon”. That icon is not currently available for users on Firefox. We suggest that approves use EPC in Edge or Chrome.

Link to Term

Description tooltip may sometimes appear in background when scrolling after preview. This issue is usually experienced when browsing on slower networks.

Text Box

Firefox users may encounter issues adding images and tables in rich text fields such as descriptions and procedures. We suggest to use Edge or Chrome instead.

Swimlane Mapping

When in swimlane mapping, flow objects are placed on the border of a lane; the map layout in object books will differ from the layout designed by the modeler. Additionally, the RASCI-VS filter is defective and is currently being fixed.