EPC Release Notes

12.2 — Last update: Feb 16, 2021

Interfacing Technologies Corporation

Table of Contents

claimer1		
Important Notice	2	
Overview	3	
WHAT'S NEW IN 12.2	4	
Link-to-Object	5	
Assign a Rule to Multiple EPC Objects	6	
To-Do Module	9	
Rich Text Process Goal	10	
Rich Text Custom Attributes	11	
Flow Object Transitions Highlight	13	
FEATURE ENHANCEMENTS OVERVIEW	15	
Graph Enhancements	18	
Glossary Module Enhancements	27	
List View Enhancements	28	
Secondary Save/Add button on top of the form	30	
Generate missing PDF previews for documents	31	
Email Notification for Maturity Target Date	32	
Include SETS within Single Process Export	33	
Google Analytics: Apply Regex Filtering	34	
Performance Enhancements	35	
UI in Swedish and Hebrew	36	
FIXED ISSUES	37	
Issue List 12.2	38	
KNOWN ISSUES	40	
Known Issue List 12.2	41	

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Important Notice

Microsoft has announced that it will end support for Internet Explorer 11.

Consequently, as of version 12.1 EPC no longer supports IE 11. Interfacing advises its clients to use EPC with Edge, Firefox, or Chrome

Overview

The objective of EPC version 12.2 is to enhance the EPC Web App, and to facilitate user engagement capabilities, while improving the general usability of the Web App. The V 12.2 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 12.2

The following major new features and capabilities have been introduced in the 12.2 release

<u>Link-to-Object</u> | EPC allows users now to reference any other EPC object in any rich text field of another EPC object. For instance, a role created in the organization module can now be referenced in the procedure field of a process task. By doing so, end-users are provided with the description of the role by simply hovering over the role when reading the procedure. This feature can be used in tasks' procedure, process description, process goal, and description of any other EPC object (document, rule, risk, etc.)

Assign a Rule to Multiple EPC Objects | In previous versions, when analysts needed to assign the same rule to multiple objects, they had to go each objects page and assign the rule. EPC 12.2 now provides analysts with the ability to assign a business rule to multiple objects directly from a centralized form in the rule's details page.

<u>To Do Module</u> | View and manage all your pending tasks and actions such as confirmations, approvals and collaboration actions directly from the new To-Do module.

<u>Rich Text Process Goal</u> | The goal field in the process has been changed from plain text to a rich text format. This style of text allows for additional formatting improvement such as:

- · font sizes
- font-style (e.g., bold, italic)
- colors
- tables
- images

Rich Text Custom Attributes | Add a new layer of classification to your EPC objects (e.g. Process, Flow Object, Document, etc.) by creating new rich text custom attributes (UDA). This style of text allows for additional formatting improvement such as:

- font sizes
- font-style (e.g., bold, italic)
- colors
- tables
- images and many more.

<u>Flow Object Transitions Highlight</u> | In complex process maps it is not always easy to visualize the transitions between process tasks and flow objects. This new feature highlights all incoming and outgoing transitions of a flow object when selected

Link-to-Object

Functionality

EPC allows users now to reference any other EPC object in any rich text field of another EPC object. For instance, a role created in the organization module can now be referenced in the procedure field of a process task. By doing so, end-users are provided with the description of the role by simply hovering over the role when reading the procedure.

This feature can be used in tasks' procedure, process description, process goal, and description of any other EPC object (document, rule, risk, etc.)

Once object 1 is referenced in object 2, the impact graph and list of both objects are updated to show that relationship. This grants analysts a better perspective on the relationship between objects for better managing their changes and modifications.

Customization

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



Assign a Rule to Multiple EPC Objects

Functionality

In previous versions, when analysts needed to assign the same rule to multiple objects, they had to go each objects page and assign the rule.

EPC 12.2 now provides analysts with the ability to assign a business rule to multiple objects directly from a centralized form in the rule's details page.

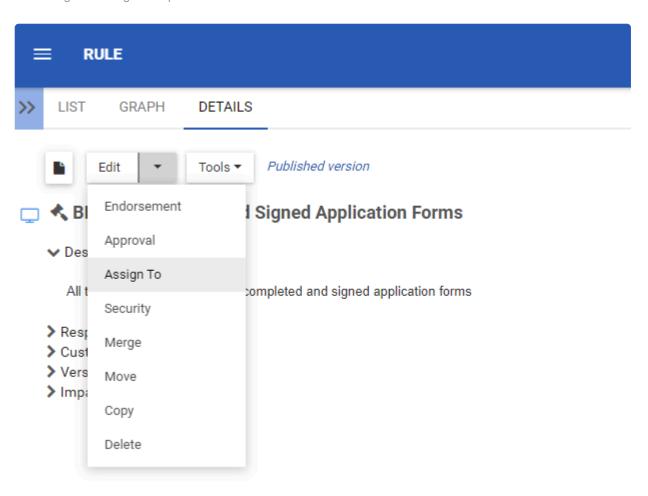
Preview



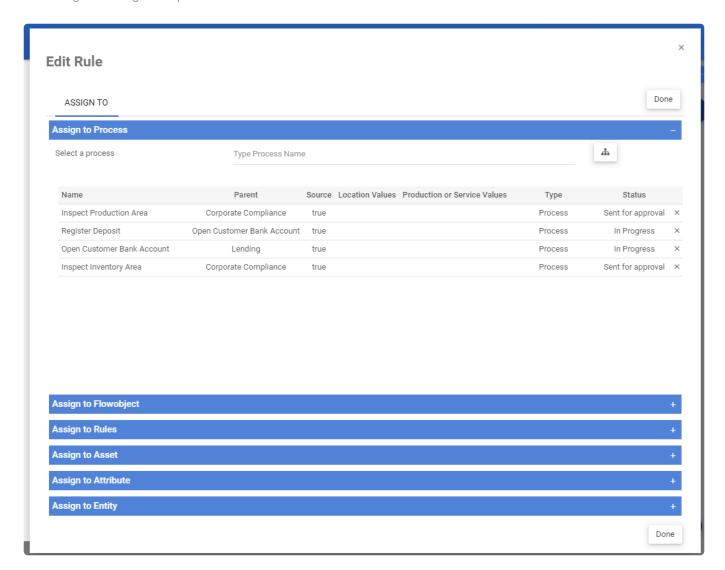
How?

The assignment feature will allow you to assign the same rule on more than one object through a single interaction.

Select the **Assign To** option from a rules' detail page.



Select and assign processes, flow objects, rules, assets, attributes, and entities to a rule.





It is important to note objects which are locked, in review, do not have write permission or are in an approval cycle will also be ignored.

To-Do Module

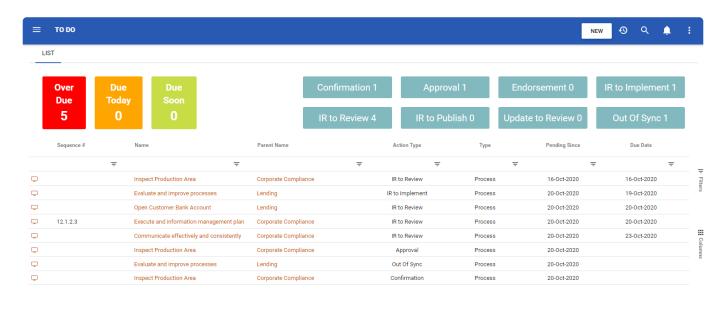
Functionality

The To-Do module provides each user with an organized list of all their pending actions such as confirmations and approvals. Its purpose allows members of an organization to clearly see an outline of their pending and upcoming tasks.

The To-Do module includes column management and quick filter options which allows managers and team members to:

- · add, remove and drag columns
- · filter actions type to narrow down a search
- · identify key actions that are overdue, due soon or are due today

Preview



Page 1 of 1 > >|
Show: 10 - 25 - 50

Rich Text Process Goal

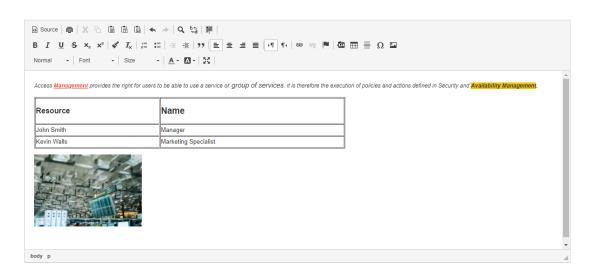
Functionality

The goal field in process has been changed from plain text to a rich text format. This style of text allows for additional formatting improvement such as:

- · font sizes
- font style (e.g., bold, italic)
- · colors
- · tables
- · images

Preview

Goal



Rich Text Custom Attributes

Functionality

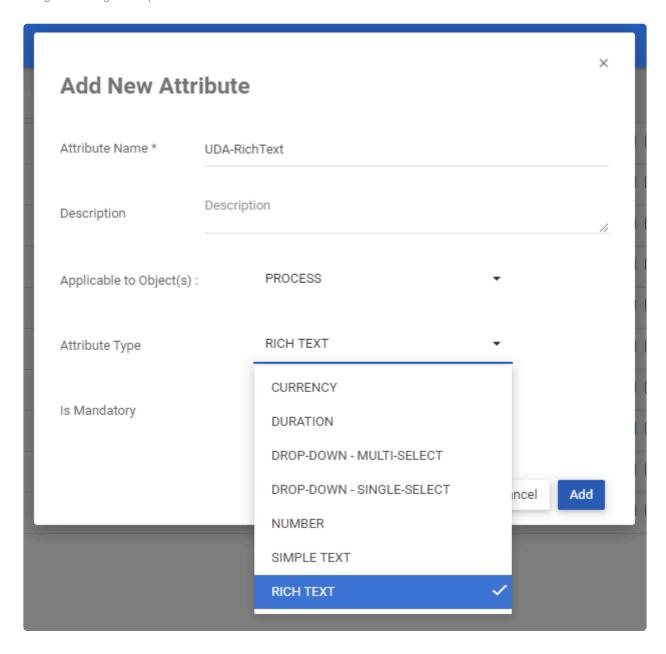
Add a new layer of classification for user-defined attributes (UDA) to include rich text fields on different EPC objects (e.g. Process, Flow Object, Document, etc.) This style of text allows for additional formatting improvement such as:

- font sizes
- font-style (e.g., bold, italic)
- colors
- tables

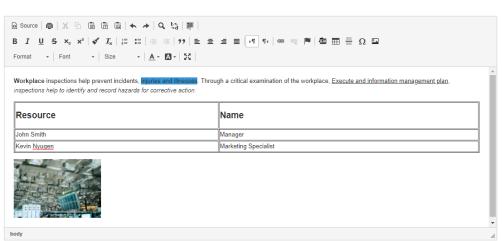
and many more.

EPC 12.2 provides document analysts with the freedom to include numerous rich text sections from legacy documents (e.g. standard operating procedures, user manuals, training guide or work instructions) directly into EPC in an efficient and organized manner.

New rich text UDAs can be created by admins from the admin panel.



UDA-RichText



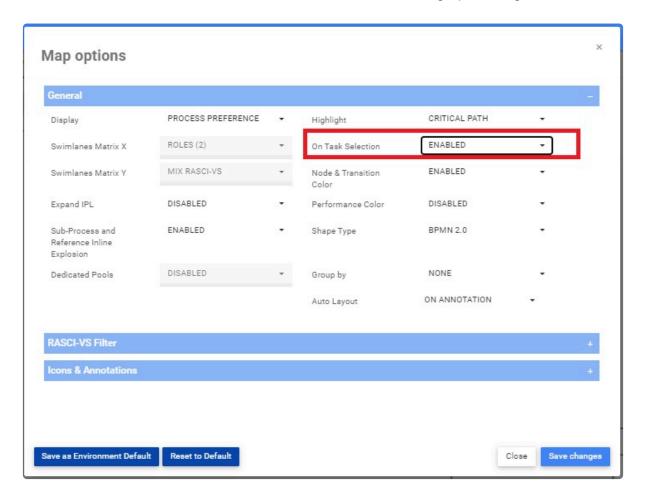
Flow Object Transitions Highlight

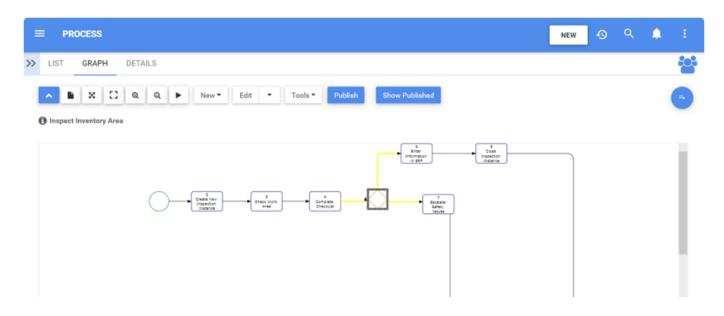
Flow Object Transitions Highlight

In complex process maps it is not always easy to visualize the transitions between process tasks and flow objects. When a flow object is clicked, this new feature highlights all incoming and outgoing transitions of a flow object when selected.

Note: The color and thickness of the transition highlight can be changed by the EPC admin from the admin panel

In order to use this new feature, users will have to enable it from their graph settings menu





FEATURE ENHANCEMENTS OVERVIEW

The following major new enhancements and capabilities have been introduced in the 12.2 release.

Graph Enhancements

<u>"Up" Navigation Icon</u> | When on a map of a process in graph mode, this new button allows users to navigate faster to the map of the parent process

<u>Process Map Description Icon</u> | Users can now access the process' description from an icon on the process map

<u>Set level process display limit</u> To improve performance, admins are now capable of limiting the number of processes to display at the process set level.

New Event And Gateway Annotation Style | EPC now has a new annotation style for Event and Gateways.

Quicker map editing | User can now copy and paste flow objects using the right-click on their mouse, as well as multi-selecting several flow objects by dragging their mouse. In addition, users can now double click on an event and/or gateway to edit its name.

<u>Intermediate Event added to Stencil</u> | When editing a process, the object stencils now include intermediate events in order to allow users faster access to this type of flow objects.

<u>Set Color On Transitions</u> | To allow for better visibility and creativity, users can now set colors on transitions arrows in graphs.

Graph Zoom Lock | When using the reroute feature, the zooming magnitude is now maintained.

<u>IPL Search With Sequence Number Assistance</u> | To allow users to better identify the processes they wish to link, the sequence number has been added to appear on the IPL list search to facilitate its selection.

<u>"New" Button On Graph Tab</u> | Users can now add new objects from the Graph tab, as they previously have been able to on the Details and List tabs.

Keep port and re-route transition in maps | EPC 12.2 improves your process map editing capability using a new reroute option which optimizes the best layouts based on the new locations of the connectors and the overall location of the flow elements.

Reduce minimum space on material annotation before putting the X | To provide for condensed legible maps, we reduced the size of all annotations and materials by removing extra white space and hiding the [X] to close an annotation or material and only display it with mouse roll-over.

Input/Output Exact Match | Input/Output search field enhanced with an option to limit results to exact

matches only.

<u>Split Gateway and Events Annotation Selection</u> | To facilitate the management of settings for Events and Gateways, their settings have been separated to manage them as different entities respectfully.

Glossary Module Enhancements

<u>Impact Graph</u> | An impact graph has been added to the Glossary modules to better view associations related to terms within the module; allowing users to truly understand the relationship between many elements within EPC.

<u>Glossary Information Auto-Update</u> | Users do not need to worry about the consistency of the information found in their linked-texts. Any information updated on the Glossary module will also update in the tool-tip shown on the given linked texts.

<u>Locked Column</u> | Locked items in the glossary module can now be shown and filtered for in the List view of the module.

List View Enhancements

New "Last Modified By" Column On All Modules | Modules now show columns indicating which user has last modified an object; this allows for team members or the users themselves to find their own work or that of a colleague must faster.

Empty/Not Empty Filters On UDA Columns | To help filter data based on UDA's, EPC now allows users to filter these further by choosing to list empty or non-empty UDA-based data.

<u>RASCI Column In Organisation Module</u> | As of now, all modules now possess the RASCI column to filter for in list views, including assets in the Organization module.

Additional Enhancements

<u>Secondary Save/Add button</u> | Submit object creation and modification quickly with the addition of a new **Save & Close** button at the top right corner of any edit details page.

<u>Generate missing PDF previews for documents</u> | When documents are uploaded, EPC creates a pdf preview for each supporting document. While this process runs periodically, administrators now have the ability to run or rerun it on the spot with a click of a button from the admin section.

<u>Email Notification for Maturity Target Date</u> | Process Maturity information reflects the current state of a business process lifecycle, as well as the target date to attain a new level of maturity. In this release, users who are accountable or responsible for a process, will receive an email notification 30 days before the next maturity target.

Include SETS within Single Process Export | Export and import an entire process set level and its

associated business processes as an EPC data file from one environment to another.

<u>Performance Enhancements</u> | EPC v12.2 bring performance improvements and enhancements to multiple areas and features of the webapp. By modifying technical backend methods used in loading pages and optimizing the number of calls between EPCs' interface and the system database. These new improvements ensure an ameliorated and more seamless experience for end-users as well as users in edit mode.

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Google Analytics Regex Filtering: Regular expressions (regex for short) can help speed up your use of Google Analytics as well as add extra flexibility to the way you include (or exclude) particular data and information from reports.

Ul in Swedish and Hebrew | EPC's user interface is now available in Swedish and Hebrew

Graph Enhancements

EPC's newest updates on the graph will enhance many areas, mainly those of navigation, settings and editing of maps.

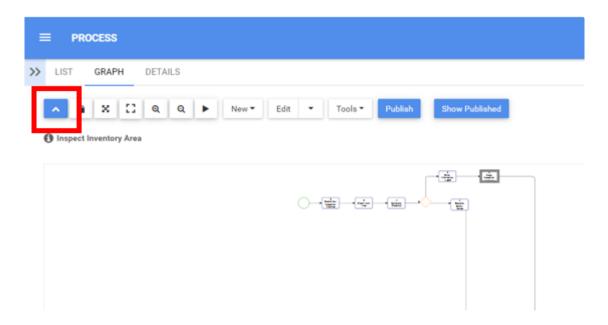
Navigation

Navigation

"Up" Navigation Icon

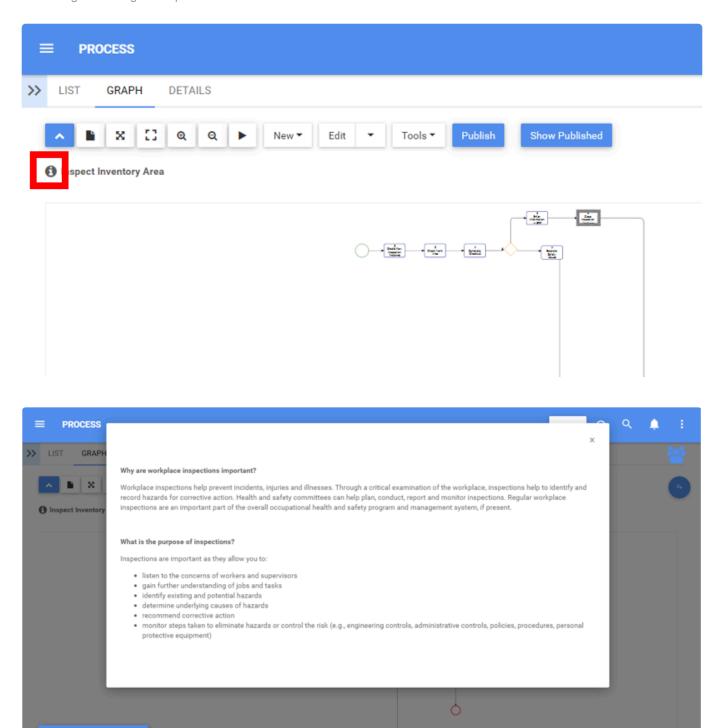
Within the navigation updates, EPC now has the Up icon accessible through the process graph tab to allow users to navigate between sub-processes and parent processes.

Preview



Process Map Description Icon

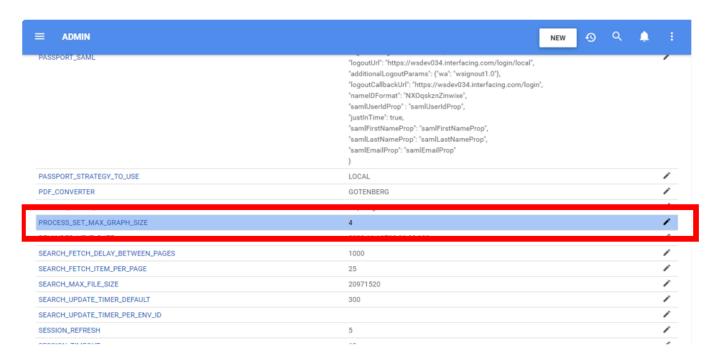
A newly added process description on a map's title will allow users to have quicker insight into the context of the map; in turn, allowing for a faster understanding of a process' map.



Settings

Limit Views on Processes

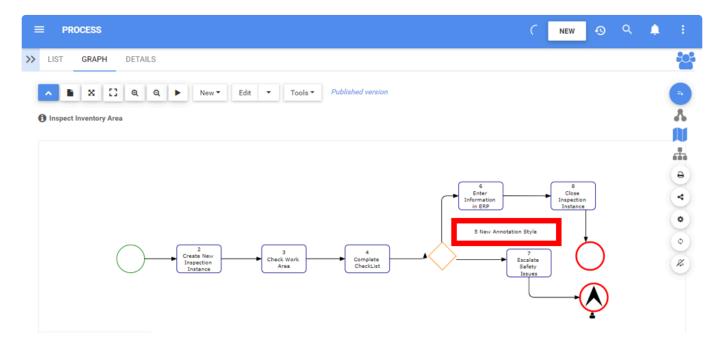
Amongst EPC's map settings updates, user will be capable of choosing the quantity of processes one can see in a process set level through the system administration settings. This will create a decent limit on sets to maintain a reasonable loading time.



New Event and Gateway Annotation Style

A new event and gateway style has been created for EPC users; it has the same format as the Input-Output Annotation Setting style (transparent link, no border, transparent background) and it will behave like the current Event and Gateway Annotation Types (i.e. it will possess the auto-layout behavior). Users will be capable of changing event and gateway styles through the Map Settings under the Icons and Annotations.

Gateway & Event annotation locations/positions are also now preserved when saved



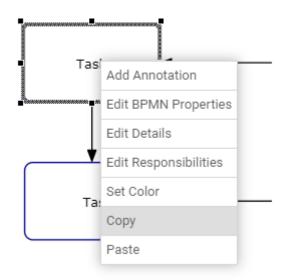
Editing

EPC has made multiple changes involving editing on maps.

Copy/Paste, Move and Edit on Right-Click

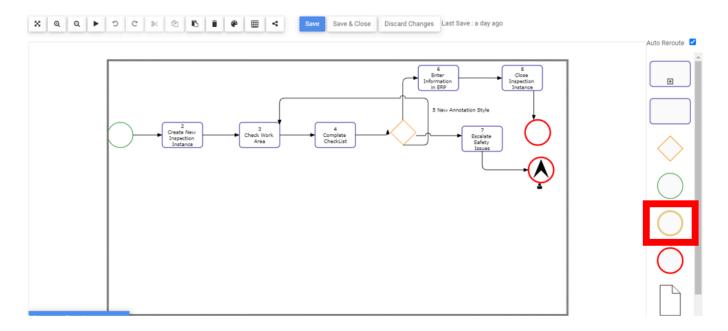
User will now be capable of copying, pasting, moving multiple selected objects and edit event and gateway names by right-clicking on the mouse to facilitate editing.

Preview



New Intermediate Event in Stencil

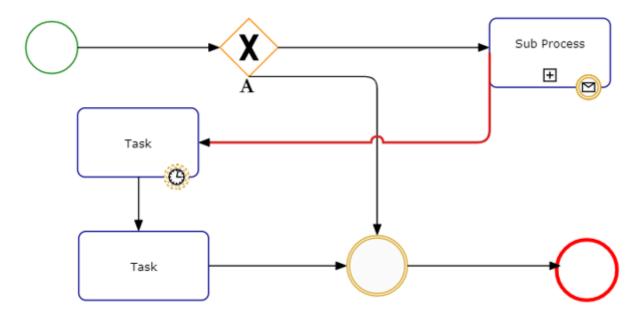
Users will now be capable of adding the new intermediate events on maps directly from the stencil allowing users to edit maps at a much faster rate.



Set Color on Transitions

To allow for more specialization diversity and creativity, users can now edit the colors of transitions between events and tasks on maps.

Preview



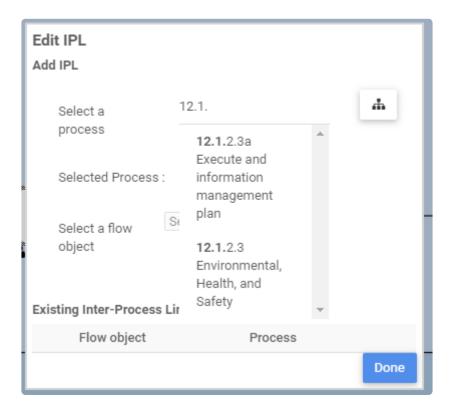
Zoom Lock

In terms of zooming, users will maintain their desired zoom level after clicking on auto-layout or reroute; instead, the zoom will be kept at the user's desired magnitude. Additionally, to enhance the experience on all maps and orientations, users will now have humps/ bridges on crossing/interlacing transitions.

IPL Search with Sequence Number Assistance

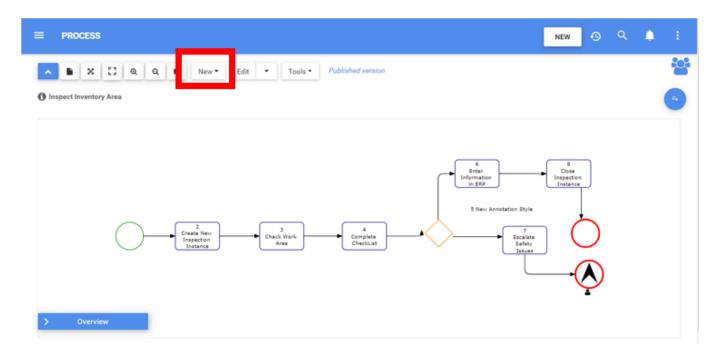
Users will finally be capable of searching objects through the IPL search suggestion by inputting the sequence numbers.

Preview



"New" Button on Graph Tab

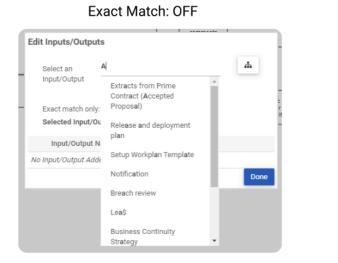
Users will finally be capable of creating new objects from the graph tab as well. It will function exactly as like the "New" button on the Details page. This will allow for quicker action taking and accessibility to necessary features from all tabs.

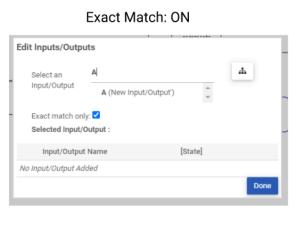


Input/Output Exact Match

When adding an input or an output to a graph transition, EPC suggested results as the users typed in the characters of the input/output label they were looking for. We have enhanced this feature by adding the possibility to limit the suggested results to exact matches only (e.g. results will not include partial matches)

Preview



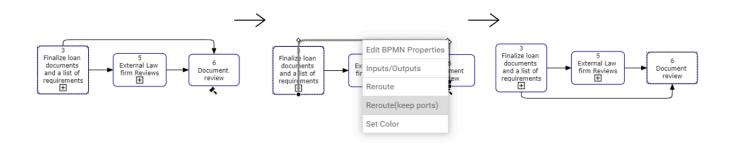


Keep port and re-route transition in maps

Flows element refers to elements (e.g., activities, events, and gateways) that are connected to form a

complete process flow. Connectors to the flow element are called connecting objects. In a complex map, where there are multiple flow elements and many connecting objects, adjusting the connectors' location can create overlapping issues. EPC 12.2 improves your process map editing capability using a new reroute option which optimizes the best layouts based on the new locations of the connectors and the overall location of the flow elements.

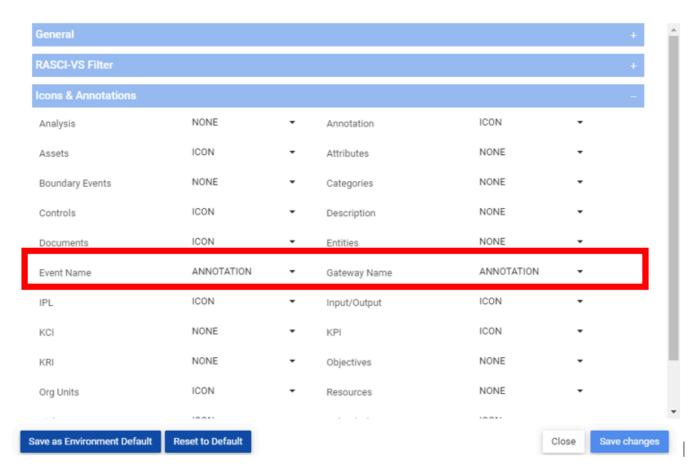
Preview



Split Gateway and Events Annotation Selection

Users will notice that the event and gateway entities in the Icons and Annotations section of graph settings have been separated. This has been done to facilitate their management to respectfully manage them as different entities; allowing for more flexibility and order when creating and editing graphs.

Map options



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Glossary Module Enhancements

Impact Graph

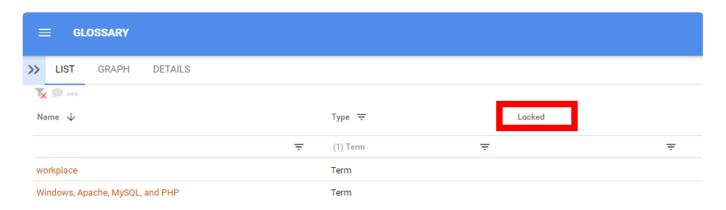
Impact Graphs provide a visual representation of the upstream and downstream associations related to items in the EPC. In simple terms, Impact Graphs show users what items are associated with one another. Seeing the different associations within terms allows users to better understand the complexity or specific business terms. These Impact Graphs can be used to educate business users.

Information Update

As modification or updates are made on an object's details; all linked texts associated/linked with the edited object will see that the hyperlinks of those texts have also been modified and updated automatically. This will allow for coherence and centralization of terms within EPC environments.

Locked Column

To maintain additional consistency within EPC environments, the **Locked** column has been added to the list view of the Glossary Module to help users identify objects they cannot edit at their first glance of the list view.

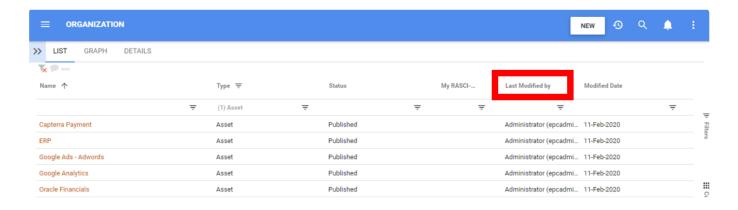


List View Enhancements

New "Last Modified by" Column on all Modules

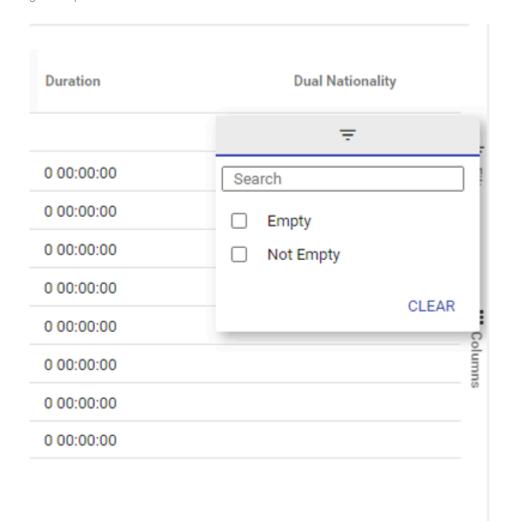
Amongst other enhancements on navigation, the newest column on the list view "last modified by" is now available on all modules which allows users to filter by last resources on an object. This will help users within a team to visualize their work or that of other members at a faster rate.

Preview



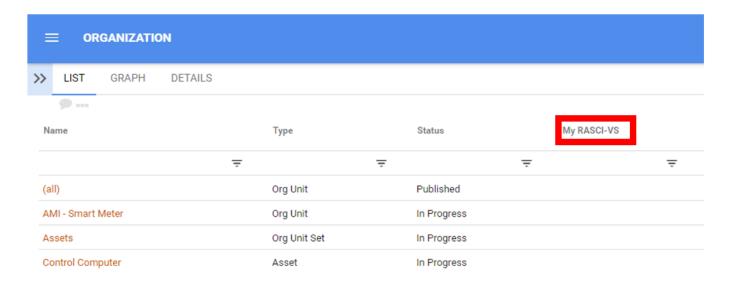
Empty/Not Empty Filters on UDA Columns

Additionally, all UDA columns will have an empty/not empty filter to allow for better visualization and search when filtering data based on the desired UDA's.



RASCI Column in Organisation Module

Finally, the addition of the RASCI column in the list view of the Organization module brings structure and clarity to understanding the roles that various stakeholders play with regards to an asset.

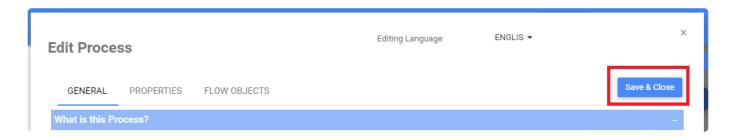


Secondary Save/Add button on top of the form

Submit object creation and modification quickly with the addition of a new save & close button at the top right corner of any edit details page.

Functionality

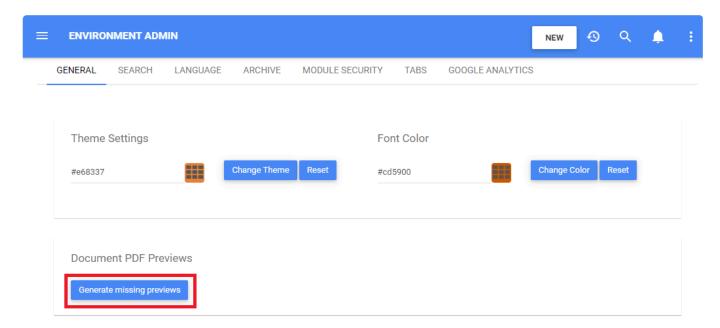
EPC 12.2, a new button is available on the top right corner of all forms. Simply, click on the **save & close** to submit and close a form.



Generate missing PDF previews for documents

Functionality

When documents are uploaded, EPC creates a pdf preview for each of the supported document. While this process runs periodically, administrators have now the ability to run or rerun it on the spot with a click of a button from the admin section



Email Notification for Maturity Target Date

Functionality

Process Maturity information reflects the current states of a business process lifecycle, as well as the target date to attain a new level of maturity. In this release, users who are accountable or responsible for a process, will receive an email notification 30 days before the next maturity target.

Preview

Maturity Target Date Notification

Thu Oct 29 10:41:00 EDT 2020

Hello John Smith,

The following EPC objects are approaching their next maturity target date.

Items Approaching Target Date Within Next 30 Days

Name	Environment	Next Maturity Target Date
P2 - maturity	Web Admin Environment	30 Oct 2020

Items Target Date Past Due

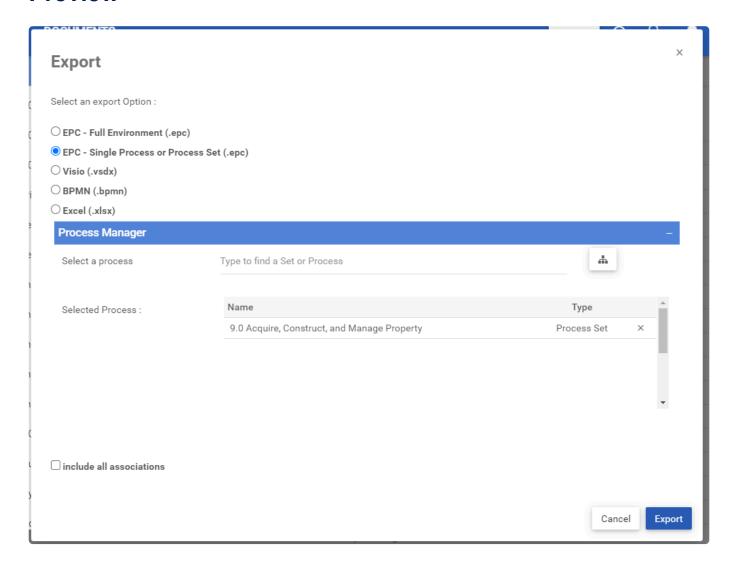
Name	Environment	Due Date	Past Due since (days)
P4 - past due	Web Admin Environment	27 Oct 2020	2

Automatically built/powered by Interfacing.

Include SETS within Single Process Export

Functionality

Export and import an entire process set level and its associated business processes as an EPC data file from one environment to another.



Google Analytics: Apply Regex Filtering

Regular expressions (regex for short) can help speed up your use of Google Analytics as well as add extra flexibility to the way you include (or exclude) particular data and information from reports. You can think of regular expressions as a way to search for and match specific information.

They are predefined characters or a series of characters that broadly or narrowly matches and selects patterns in your digital analytics data.

Concerning to EPC 12.2, regular expressions can help users include or exclude any user information.

Performance Enhancements

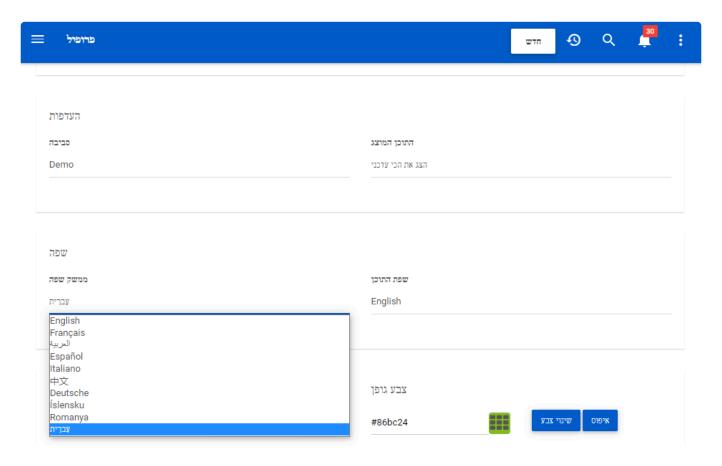
EPC v12.2 brings performance improvements and enhancements to multiple areas and features of the webapp. By modifying technical backend methods used in loading pages and optimizing the number of calls between EPCs' interface and the system database. These new improvements ensure an ameliorated and more seamless experience for end-users as well as users in edit mode. As a result, the following will now run faster:

- · Map rendering
- · Loading processes in a set level
- · Loading of user-defined attributes in a list
- · User security optimization

UI in Swedish and Hebrew

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 Swedish and Hebrew in addition to 9 other already existing languages

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



FIXED ISSUES

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

Issue List 12.2

Issue List 12.2

EPC's V12.2 brings significant improvements on previously known issues that will enhance user experience. The following are this release's most recent fixed issues.

Translation

Translations suggestions options on task has been added for the procedure section of its details form to allow for full details page translation coherence. Additionally, issues with translations when opening an object's detail page from a graph has been corrected.

Imports

BPMN imports are now successful, even if the destination process does not have the (???). Additionally, BPMN documentation imports can now be imported as descriptions. Finally, in terms of regular EPC imports, UDA values are no longer shown as null.

Details page

Issues saving process shortcuts, as well as saving and editing flow objects in the details page have now been corrected.

Graph

The graph tab header with double, the ref/local drop-down button has been correct. Additionally, whether a user is editing an object's name on a graph or swimlane map, the object will now resize on both maps. Finally, when editing a graph, the "New" button no longer appears in the tools header; it is only shown when on the graph tab's header.

Login

Trouble logging in once a Web Admin Environment has been deleted through the system admin page has been corrected; users can now log back in as usual.

Performance

Loading issues in tree selector for users without "read permission" have been corrected; these users can now enjoy a quick loading of the tree selector. Additionally, errors when refreshing a indexed search have been corrected and the appropriate results are now shown.

Process Book Generation

When a process book is generating, the appropriate indenting will now be saved and reflected in the

generated document.

KNOWN ISSUES

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

Known Issues 12.2

Known Issue List 12.2

EPC's V12.2 brings the current issues that will be fixed in the following upgrades.

Document Generation

SOP documentation currently does not generate when special characters belonging the Latin character list appears in a process description.

Graph Editing

Currently, objects with very long names and no space in between words prevent the text wrap option from functioning correctly in maps. Next, two objects both possessing critical paths cannot have colors set on their transition arrows. Following the context of transitions, when two transitions come from one port, rerouting ports will damage the port links. Also, if an event or a gateway's name is too long, the name will overlap the flow object unless a user double-clicks or saves the edits. Next, when IPL's are set to either icon or annotation and a user decides to locate or add an event and assign an IPL to another process, once the map is saved and a user clicks on the shape name, the IPL's shape is not maintained. Additionally, default process preferences that are set in the admin settings do not reflect on subprocesses that are added through the graph editing. Finally, when assets or artifacts are added to a new swimlane process, changing any object corrupts the map.

Tabs & Navigation

When users click on an object from a set level and navigates to the detail's tab, the detail's tab cannot currently load. Additionally, when users approve or reject a document while viewing its graph tab, the page reloads blank instead of showing the graph tab of the given document with options to approve, reject or endorse. Next, when comparing graphs, the graph on the left is automatically set to have autolayout applied. Finally, when navigating to the homepage and creating a "My Objects" widget, when selecting objects with many types, the widget is incapable of showing all the necessary data.

Performance

When Firefox users click on a preview icon for a "docx" document; instead of showing a preview box, users will be asked to open/download a pdf version.

Imports

When importing a process and editing its graph, the canvas do not surround shapes in maps.

Notifications

Additionally, users that only have publish-view will see notification for actions on never published objects

that are still in draft.