## **EPC Release Notes**

12.3.2 — Last update: May 28, 2021

Interfacing Technologies Corporation

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### Release notes 12.3.2

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### Resolved Issues in Service Pack 12.3.2

#### **Graph improvements**

#### **Graph layout**

Graph layout of a unique published version and latest version keeps the same data. It no longer changes the name to none or auto-highlights the objects.

Also, in the graph auto- layout the alignment of the annotations has been corrected by integrating the following graph improvements:

- 1. Manually Saved locations inputs/outputs and annotations will maintain current locations and data.
- **2. Auto-laid** out materials and annotations will automatically improve location on upgrade.
- **3.** Removing extra paddings in label rectangles and excluding "X" button from the annotation box, improving clarity in graph content.
- 4. Removing minimum length on edge labels and the gap between Gateway & edge after rerouting.
- 5. Edge labels are closer to edges after Auto-Layout.
- **6.** Reseting Edge labels to stay close to edges while moving shapes: the annotations are moving with the arrow in the graph and the text don't overlap.
- **7.** The annotation text is wrapped upon *Enter* or *Click-off* instead upon *Save*. As result, the annotation text layout will be more accurate while editing the Graph. Avoiding annotation layout changes, after saving the edits.
- 8. IPL overlap is fixed
- 9. The Analysis icons for unchanged data are removed on upgrade

Additionally, compare graphs option has been improved and all the information displayed now is correct. Graph no longer misplaces material annotation. The shapes are copied and they are no longer empty.

New/Edit Maps: Mapping and auto-layout enhancements always available. Re-run auto-layout to optimize the location of the shapes & inputs.

TIPS & TRICKS: A good way to validate if you want to optimize your current map with the latest auto-layout features is to run auto-layout in view mode (not edit mode). If you are happy with the new layout, then select EDIT and run auto-layout in edit mode & save your changes.

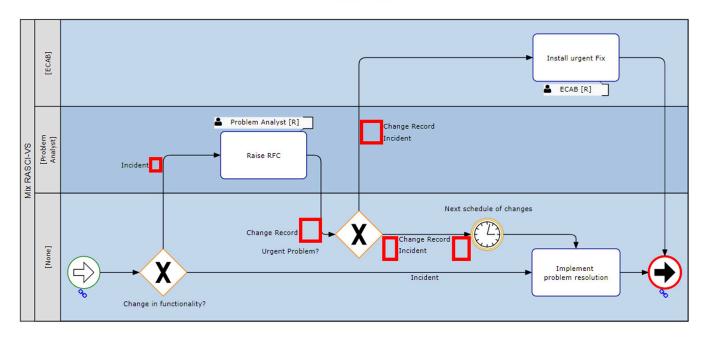


<u>Note:</u> No auto-layout algorithm is perfect – we always recommend you to review and manually optimize the layout after auto-layout.

#### **Graph layout improvements overview**

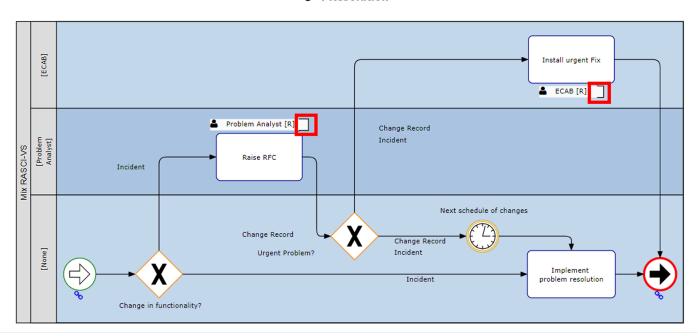
### Auto-Layout <a href="mailto:BEFORE">BEFORE</a> (Input/Output)

#### **0** 4 Resolution



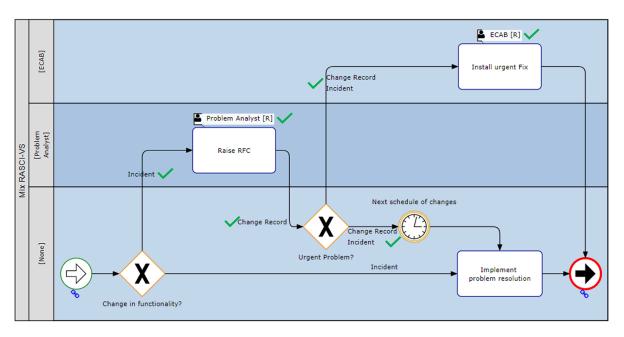
### Annotation Size **BEFORE**

#### **6** 4 Resolution

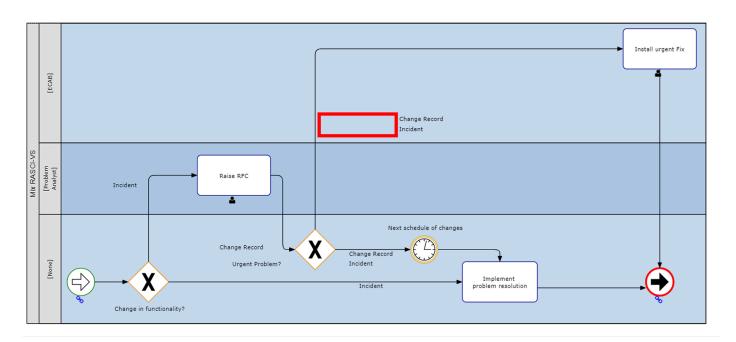


### Input/Output Auto-Layout & Annotation Size AFTER

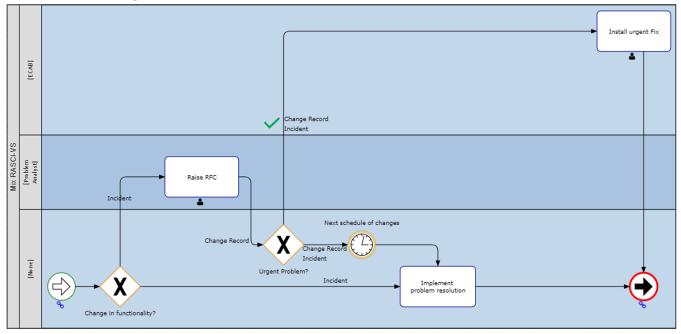
#### **6** 4 Resolution



# Input/Output during Mapping <u>BEFORE</u> Transition with edge



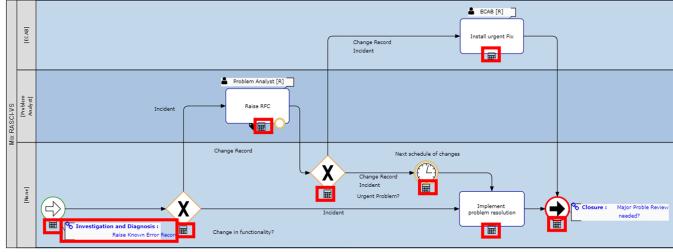
# Input/Output during Mapping <u>AFTER</u> Transition with edge



### IPL & Analysis ICON BEFORE

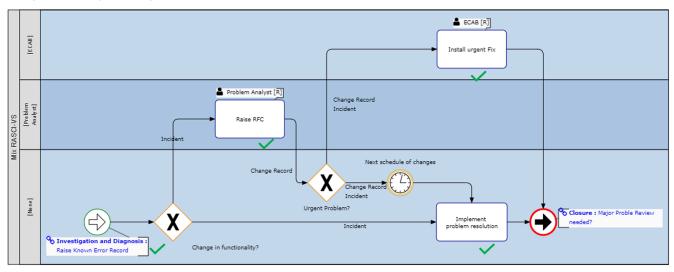
IPL Text extends beyond the edge of the annotation box

Analysis Icon always shows up even when analysis data has not been changed



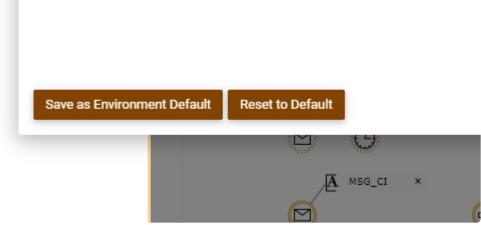
# IPL & Analysis ICON <u>AFTER</u> IPL Text all in Box & Reduced Width (extra padding removed)

Analysis Icon Only shows up when there is data



#### **Map Options**

In Open button menu, the gear button now offers "Save as Environment Default" in Map Options and assets are no longer repeated.



Save as Environnement Default button

### Resolved Issues in Service Pack 12.3.1

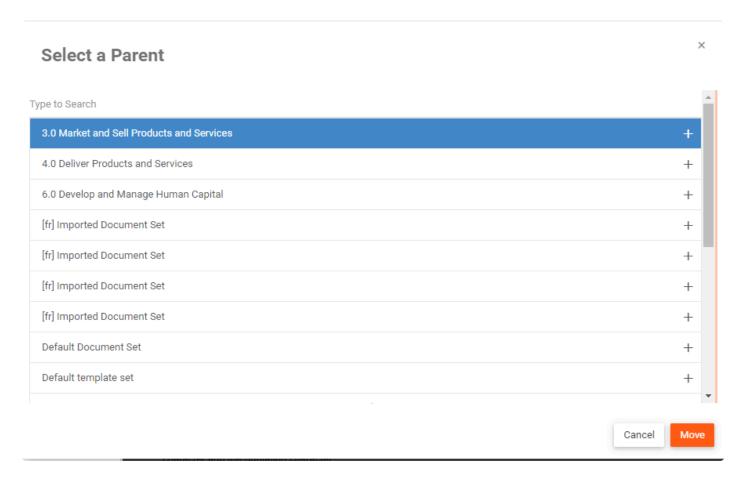
### Improvement requests

#### **Security**

In the previous version, some users with permission encounter problems viewing Folders or Sets when Copying or Moving as is shown in the image below.

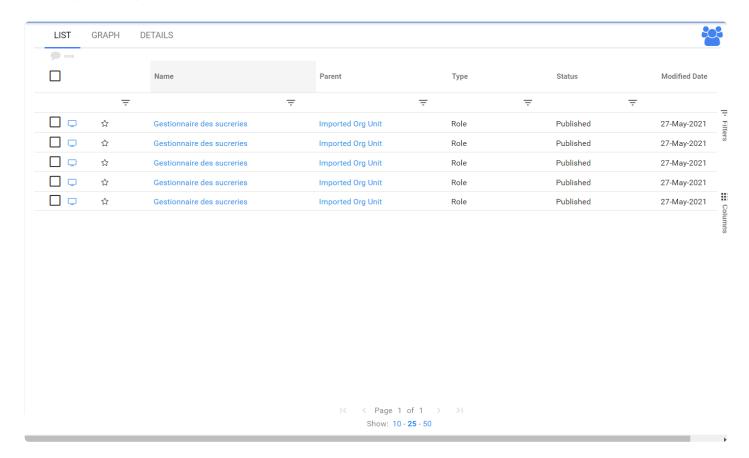


This issue has been resolved, now users can see the tree when moving and copying.

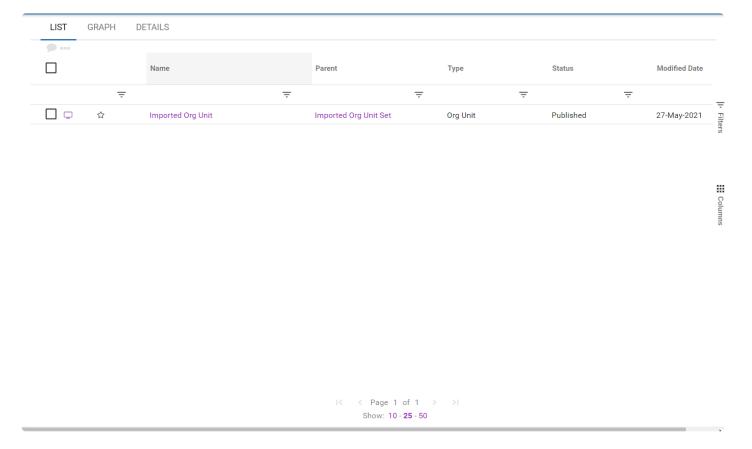


#### **Import Excel**

When importing an Excel document to create a process, multiple unexpected objects of association (Ex: Roles, assets, document) were created.



This issue has been fixed and now only the expected roles are created.

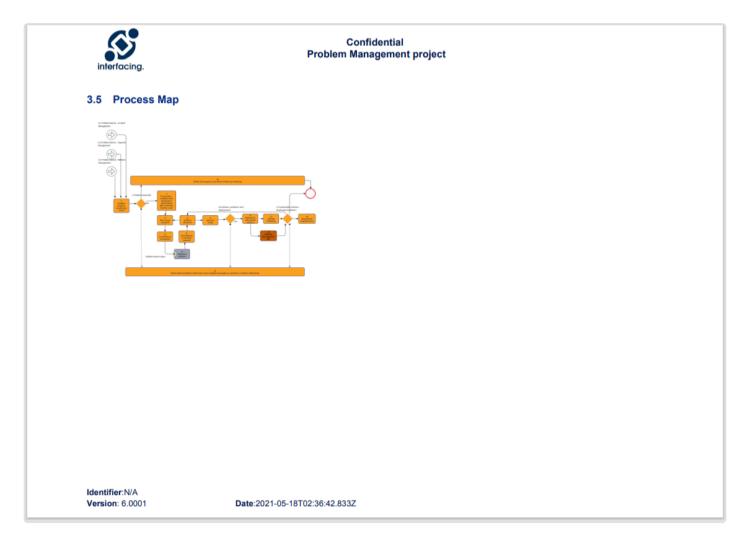


Also, some users observed that if the RASCI\_ROLE were not put in brackets, the responsibility letters would be included in the name "Gestionnaire des sucreries (A). This bug has been resolved.

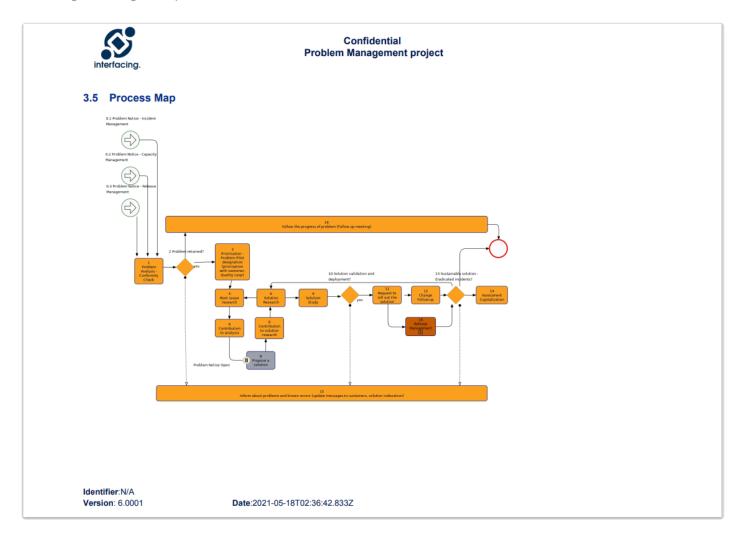
Object Name ▲	Parent	Object Type	Assignment Type	Justification	Impact Type	Status
Gérer la vanille	Imported Process Set	Process	RASCI-VS: A		Association	Published
Gérer le caramel	Imported Process Set	Process	RASCI-VS: A		Association	Published
Gérer le chocolat	Imported Process Set	Process	RASCI-VS: A		Association	Published
Gérer le sucre	Imported Process Set	Process	RASCI-VS: A		Association	Published
Gérer les bonbons	Imported Process Set	Process	RASCI-VS: A		Association	Published
Imported Org Unit	Imported Org Unit Set	Org Unit	Directly Impacts		Association	Published

#### SOP

When downloading the SOP with 'Reduce map to fit on a single page', the size of the map was reduce to a quarter of the size of the page.



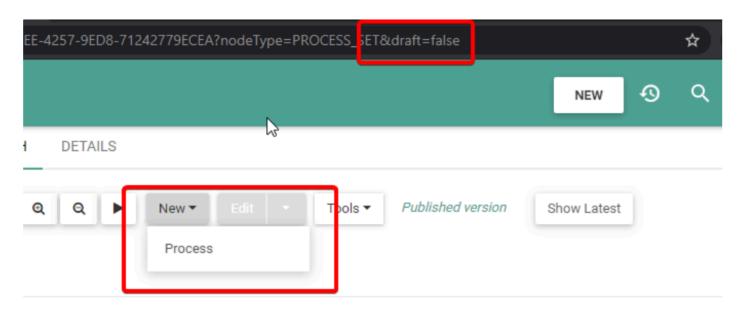
Now, the SOP with 'Reduce map to fit on a single page' fits the size of the page.

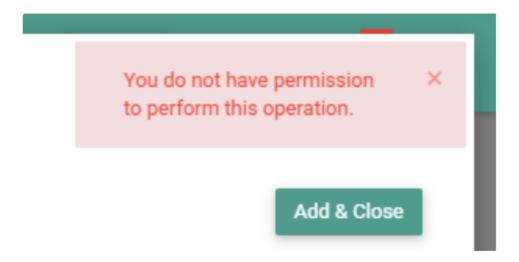


Also, in some cases SOP was failing, this issue has been resolved.

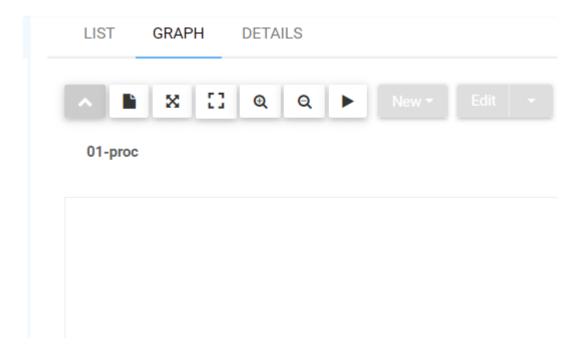
### Create object while in draft

When viewing Draft version in process, some user had the new button enabled and user could open a form but on save the user would get permission error.



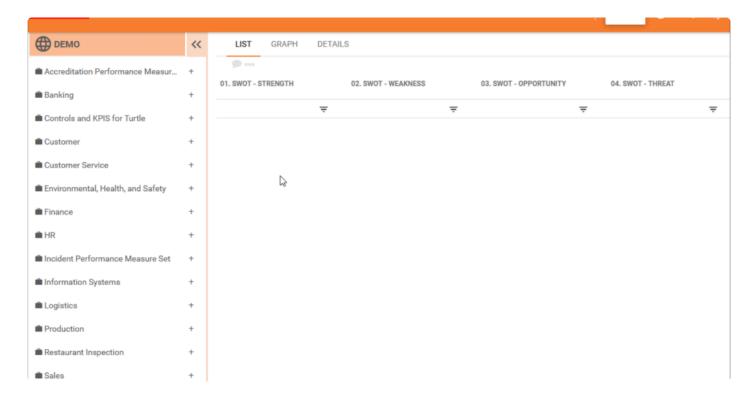


This issue has been resolved, now a user can't open a form to create an object while in draft, the button is grey out.

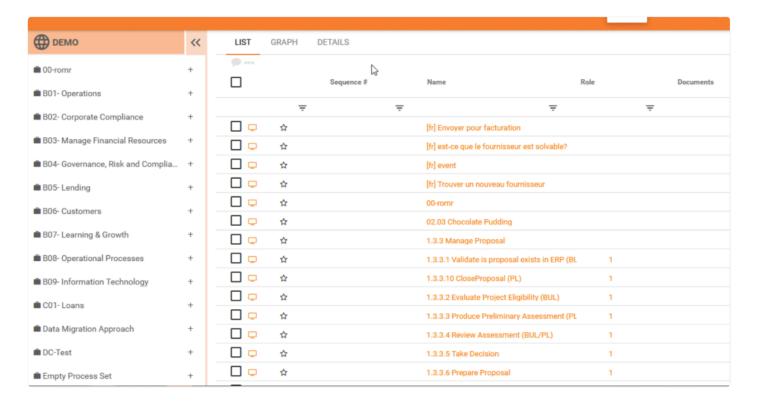


#### **Process**

When entering or returning to the Process tab in list view, the page would quickly switch to another page and go back to process.

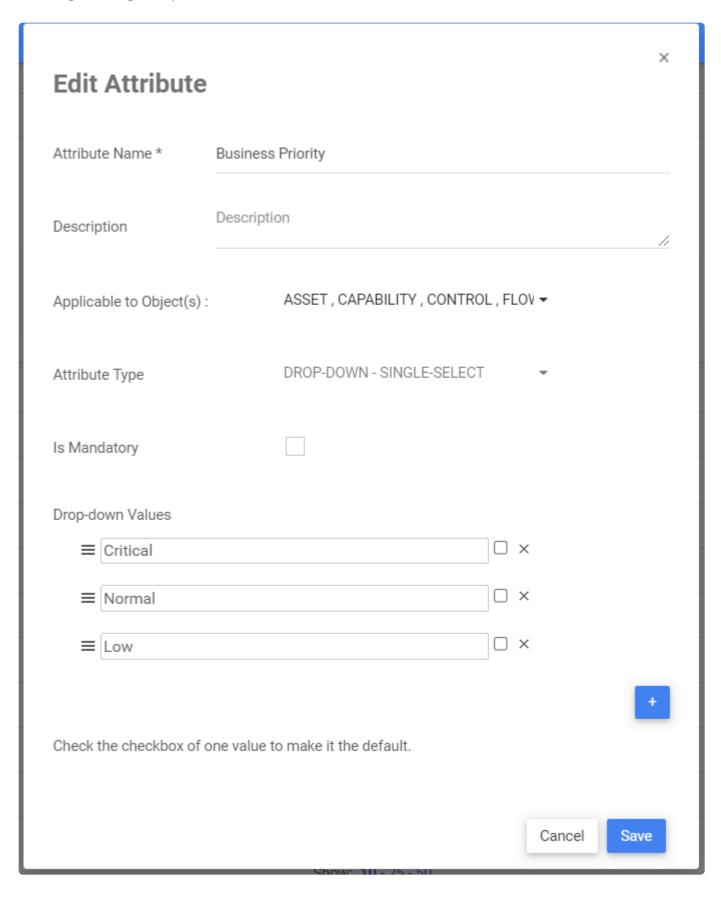


This bug has been solved and the page no longer switches.



### **System Admin**

In the previous version, some users experienced issues when cancelling changes on attributes as these were saved.

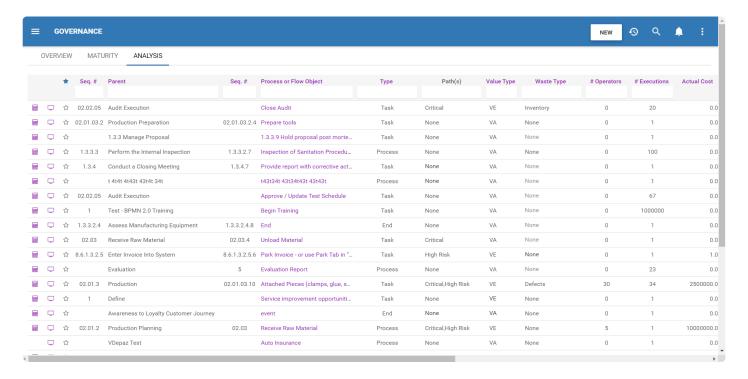


Now when editing or creating an attribute in system admin, it doesn't save the changes when cancelling them.



#### Governance

In the las version some users couldn't add numbers that contained cero on Governance in the the execution field of analysis, this issue has been fixed.



### WHAT'S NEW IN 12.3

#### The following major new features and capabilities have been introduced in the 12.3 release

<u>Assignment & Justification Type</u> | In EPC, an instance of assignment type represents a specific description between two business object (such as an association between a Process object and a Document object).

<u>Custom Flowchart</u> | EPC 12.3 now provides a new level of customization to your process maps by allowing the addition of custom images to replace standard flow chart shapes.

<u>UDA Export and Import To with Excel</u> | EPC's export and import to excel feature has been extended to include UDAs. Analysts can now export EPC object to an excel format and to re-import them back to EPC into a new environment or to update existing objects with new data

<u>Process Map Image Capturing</u> | EPC now provides users with a functionality to capture the view of a process map as a PNG image to later paste in an external document such as a Word document or Powerpoint presentation.

**Community** | Be part of Interfacing's new community portal. Engage in discussion with subject matter experts, find range of tutorials offering tips and lessons on wide variety of features in EPC, and discover a wealth of help documentations and videos from services and support reports to templates.

### **Assignment & Justification Type**

#### **Functionality**

In EPC, an instance of assignment type represents a specific description between two business object (such as an association between a Process object and a Document object).

In order to better define these relationship between objects, EPC now provides analysts with the capability to declare for each relationship a type and its justification.

An Assignment type and Justification contains the following information:

- A name to describe the relationship (required).
- A simple text file to further describe in detail (optional).

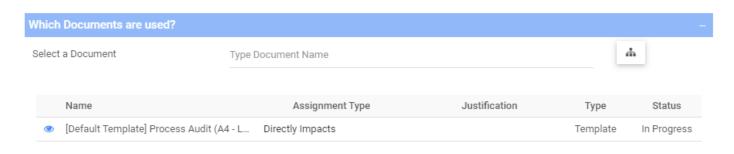


Note: relationship types can be added, removed, and edited in the admin panel of EPC.

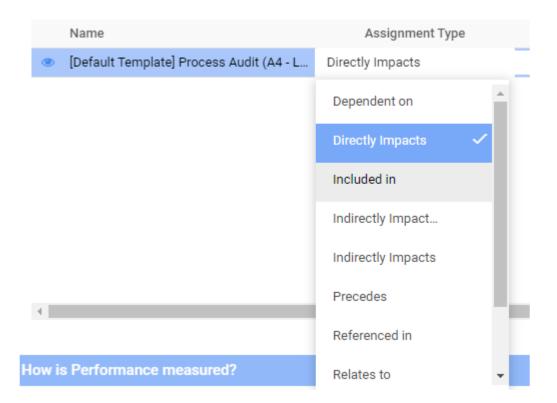
#### **Preview**

#### How it works?

· For example, associate a document to a process.



Select and assign a type for this association. (e.g, Directly Impact, Referenced In, etc.)



• Fill the Justification cell (optional)

Justification

### **Custom Flowchart**

### **Functionality**

EPC 12.3.2 now provides a new level of customization to your process maps by allowing the addition of custom images to replace standard flow chart shapes.



Note: Custom images can be added from the admin panel SVG images. Uploaded files must be in SVG format and individually no larger than 1 MB.

#### Customization

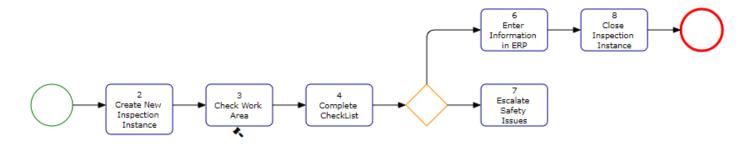
The following elements can be customized:

- · Start event
- End event
- Intermediate event
- · Gateway event
- Task event
- Subprocess event
- · Annotation events

Custom graphics are tied to the system setting to which they are uploaded—if you have multiple environments, then all the environments will have the new custom graphics.

#### **Preview**

#### **BPMN 2.0**



#### **Custom Flowchart**



### **UDA Export and Import To with Excel**

### **Functionality**

EPC's export and import to excel feature has been extended to include UDAs. Analysts can now export EPC object to an excel format and to re-import them back to EPC into a new environment or to update existing objects with new data.

### **Process Map Image Capturing**

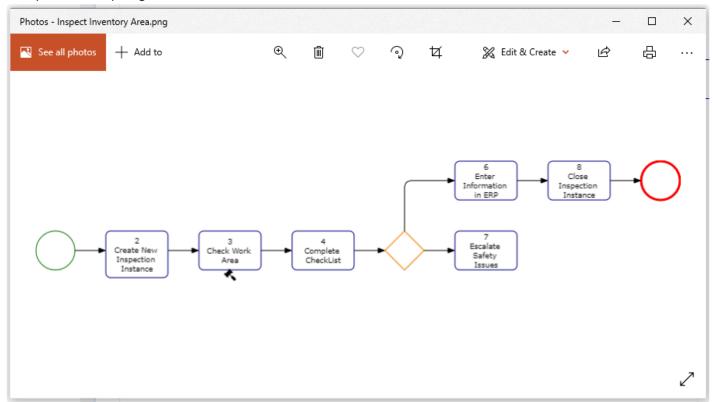
### **Functionality**

EPC now provides users with a functionality to capture the view of a process map as a PNG image to later paste in an external document such as a Word document or Powerpoint presentation.

#### How it works?

For example, click on the in the navigation menu of a process graph page.

The process map is generated as a PNG available for download.



### FEATURE ENHANCEMENTS OVERVIEW

The following major new enhancements and capabilities have been introduced in the 12.3.2 release.

Additional Business Objects Associations | The modular structure of EPC allows business analysts to associate objects from various modules between each other hence defining the relationships of how each object is used within the organisation's operations. The following are the new association capabilities that were added to EPC 12.3

<u>Swimlane Supports Copy/Paste Across Process Maps</u> | The existing copy paste functionality now allows process modellers to copy from maps designed in swimlane and paste in other process maps in swimlane; or copy from maps designed in flatmap and paste in other process maps designed in swimlane.

<u>Print Page Break by User Preference</u> | While editing a process, EPC now saves the user preference on whether to keep the canvas grid on or off.

Action Widgets to To Do Module | When clicked, Action widgets added to the home page tabs will now redirect users to the "to-do module" in order to have a quicker access to their pending actions

<u>Configure Reminder Interval</u> | Reminders alert users for any upcoming action items such as approvals, confirmation, etc.

EPC now provides user with a functionality to pre-set a time interval between notifications.

<u>Toggle Option to Publish After Importing</u> | When files are being imported into EPC, we now provides the user with options to publish all their objects at once or to import them into a draft state

<u>Process Book Automatic Width Adjustment</u> | EPC sets the images width to width of writable rectangle if no constant width value wasn't directly implied in the template

Object Copy Retains Endorsement, Approval, Change Request & Implementer Attributes | The copy/paste, reference or localize functionalities now allows any object (and its children) to include the approval and endorsement cycle definitions cycles or improvement request attributes to be part of the business object creation.

<u>Move Objects in the Glossary Module</u> The user was not able to move the object feature within the glossary module to the right folder. Now the object can be moved to their respective folders.

### **Additional Business Objects Associations**

### **Functionality**

The modular structure of EPC allows business analysts to associate objects from various modules between each other, hence defining the relationships of how each object is used within the organisation's operations. The following are the new association capabilities that were added to EPC 12.3.2

- · Asset to Asset
- · Attributes to Asset
- · Entities to Asset
- · Rule to Asset
- · Risk to Asset
- Rule to Organizational Unit
- · Rule to Role
- · Risk to Rule
- · Rule to Control
- · Control to Control
- · Attributes to Input/Output
- · Entities to Input/Output

#### **Preview**



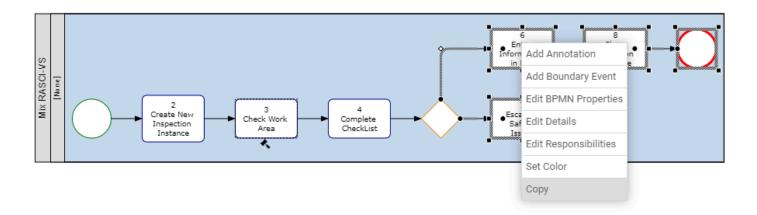
# Swimlane Supports Copy/Paste Across Process Maps

### **Functionality**

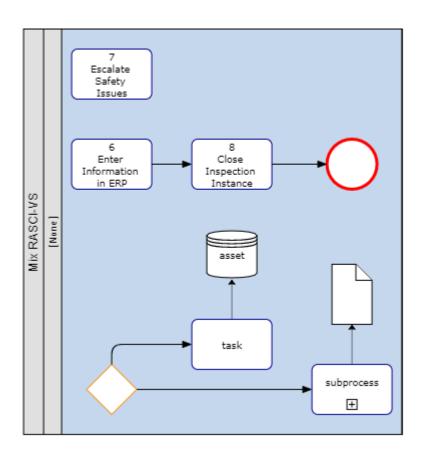
The existing copy paste functionality now allows process modelers to copy from maps designed in swimlane and paste in other process maps in swimlane; or copy from maps designed in flatmap and paste in other process maps designed in swimlane.

#### **Preview**

Select flow objects and click on Copy



Paste the content in a new process



EPC Release Notes - 12.3.2

### Print Page Break by User Preference

### **Functionality**

While editing a process, EPC now saves the user preference on whether to keep the print page break grid on or off.

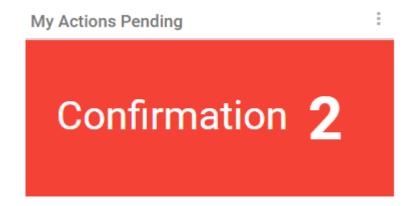
### **Action Widgets to To Do Module**

### **Functionality**

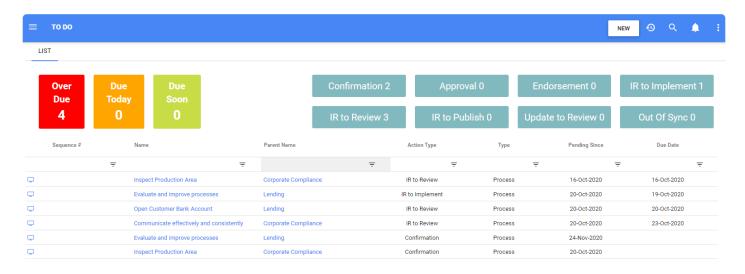
When clicked, Action widgets added to the home page tabs will now redirect users to the "to-do module" in order to have a quicker access to their pending actions

#### **Preview**

For example, click on the My Action Pending widget for Confirmation.



Navigate to the To Do module



### **Configure Reminder Interval**

### **Functionality**

Reminders alert users for any upcoming action items such as approvals, confirmation, etc. EPC now provides user with a functionality to pre-set a time interval between notifications.

#### **Preview**

For example, navigate to the system admin setting and input a value under **REMINDER\_INTERVAL** to set the interval between the reminders.

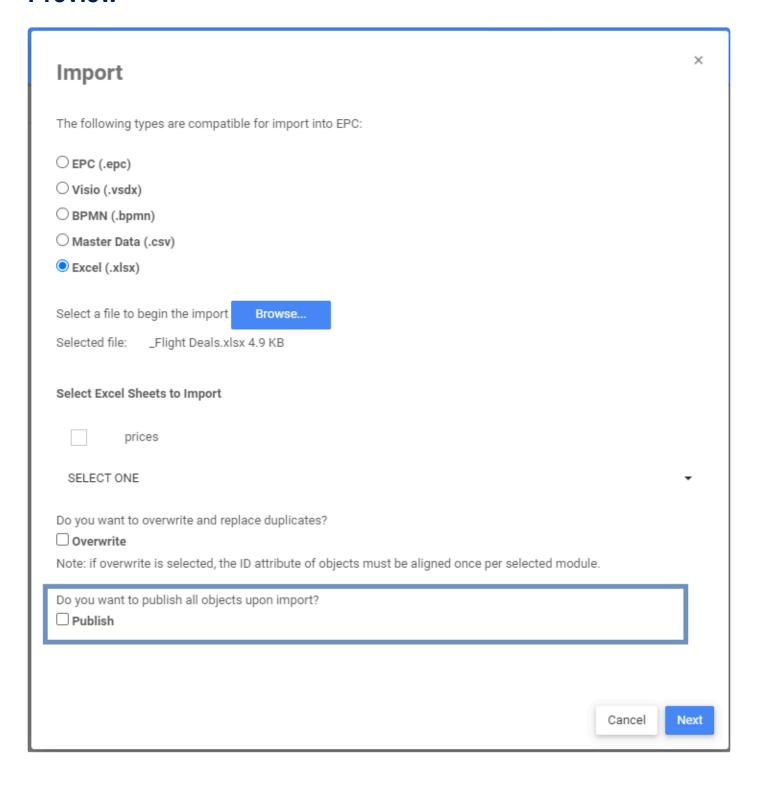


### **Toggle Option to Publish After Importing**

### **Functionality**

When files are being imported into EPC, we now provides the user with options to publish all their objects at once or to import them into a draft state

#### **Preview**



# **Process Book Automatic Width Adjustment**

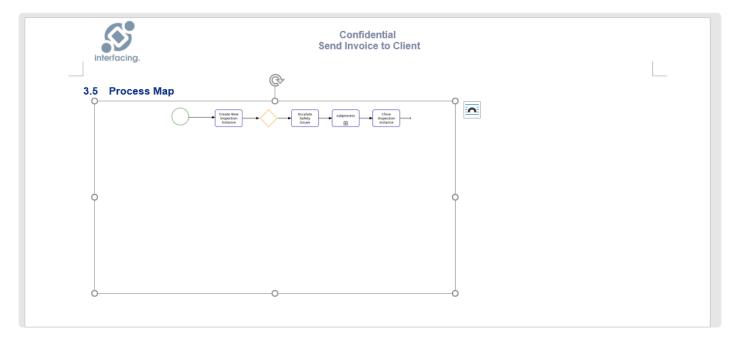
# **Functionality**

Previously, images and process maps width required a constant value in order to properly show them in process books. Now our system sets the images width to width of writable rectangle if no constant width value wasn't directly implied in the template. This improvement allows maps to be on a different orientation than rest of the template, avoid excess blank pages and any distortion with your images.

#### **Preview**

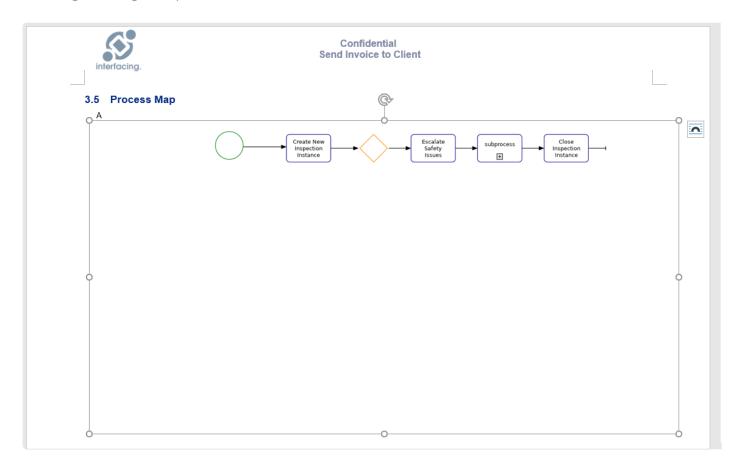
Previously, user required a custom width to properly display the process map output on processbook





Now in EPC 12.3.2, the output size of your images and maps would adjust based on the width of the template.





The output size of your images and maps would be the adapt based on the actual size of the template.

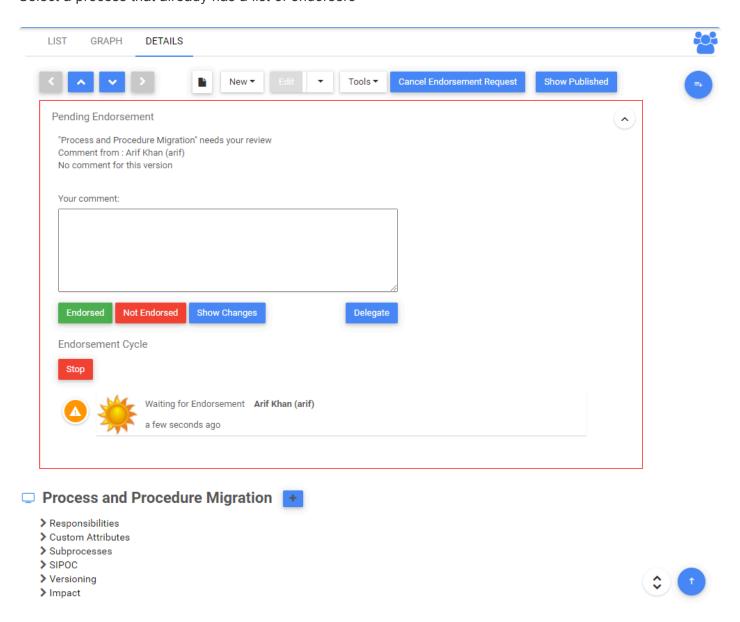
# Object Copy Retains Endorsement, Approval, Change Request & Implementer Attributes

# **Functionality**

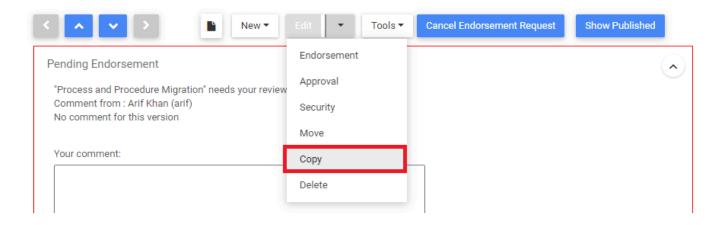
The copy/paste, reference or localize functionalities now allows any object (and its children) to include the approval and endorsement cycle definitions or improvement request attributes to be part of the business object creation.

# **Preview with Endorsement Cycle**

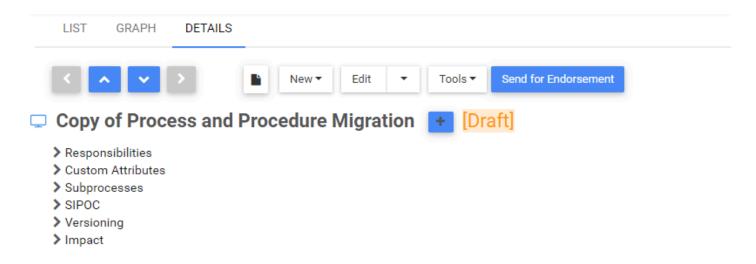
Select a process that already has a list of endorsers



#### Select the Copy option from the Edit Menu

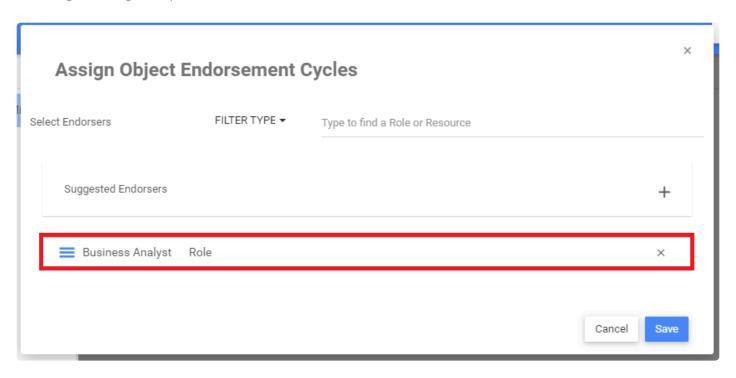


#### Select a parent and Paste the content





The newly pasted object will include the list of endorsers part of its configuration



# Move Objects in the Glossary Module

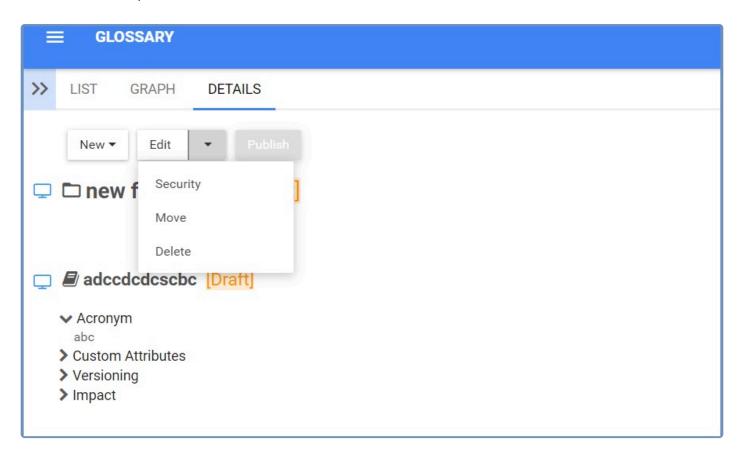
# **Functionality**

Prior to this release, it was not possible to move the object feature to the right folder within the Glossary Module. Now the user can move the object appropriately in their respective folders. This improvement helps the user to reorder the glossary objects.

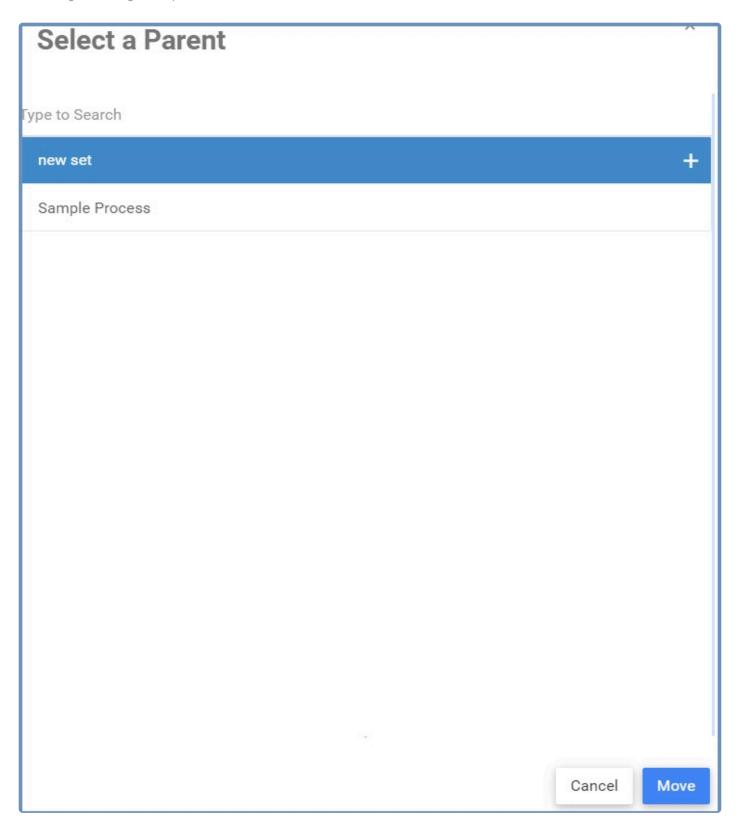
#### **Preview**

Select a term and click on the Details tab.

Select the move option from the Edit Menu.



Select a parent and Move the Object.



# **FIXED ISSUES**

# Issue list 12.3

EPC's V12.3 brings significant improvements on previously known issues that will enhance user experience. The following are this release's most recent fixed issues.

#### **RASCI**

The issues with the shape types and their target rasci values not displaying on graph mode edit after being saved & closed is now resolved.

#### **Undo/Redo**

The problem with transitions disappearing between two flow objects have now been corrected, we are now able to copy-paste and do undo-redo on objects without the transition disappearing.

Additionally, undo/redo copy/paste is now supported in transition colour. Apart from that the default name on top of the gateway is retained as expected.

Finally, users are now able to save the page after changing event characteristic and then click undo redo.

#### **UDA Attributes**

In the earlier version, the drop down multi-select UDA list will disappear after creating a new attribute. This issue with the drop-down multi-select UDA have been fixed. The drop-down values are now visible to the users for editing.

# Link to Object

Previously, link to object feature failed to preview the descriptions related to each linked object. In this current version, clicking on a linked object from the detail page will expand a tooltip and preview the linked object's description.

### **Approvals**

When sending a business object for approval, the e-signature feature was preventing users from enabling the approval cycle. This issues has been fixed and is working properly in v12.3.

#### **Dots in General Search**

The issues with text containing dots, such as sequence numbers, that are not able to search are fixed. Now

we are able to do elastic search for the text containing dots and sequence numbers.

# **Zero Values in Analysis**

Previously, when a user enables the analysis options on the graph page, all the labels were shown even though some of them don't have any value. This issue has been fixed and now it displays only the values that are greater than zero.

## Filtering in Analysis

The issue with filtering in the analysis by Name and Type that does not work properly has now been corrected. Now we are able to filter both name and type together.

## **Copy-Paste Map**

Previously, when the user copy flow objects from one process to another, the flow object was getting placed randomly in some process and far away from the map. This issue has been fixed and now it is working as expected.

# Flat Map with Material icon

In the earlier version, when a user changes the process preference of a flat map with a material icon, the annotation goes to a random place. This issue has been fixed and now even if the process preference is changed, the annotation is placed as expected.

# **KNOWN ISSUES**

# **Known Issue List 12.3**

EPC's V12.3.2 brings the current issues that will be fixed in the following upgrades.

# **Graph Editing**

When the user has enabled the inline expansion on subprocesses and proceed to clicks in the subprocess more than two or three times than the object will be duplicated. To avoid these duplications, verify that you are not clicking the subprocess more than one time.

Transitions will be detached and some objects will appeared displaced on the graph after changing the existing language of the object in a swimlane.

#### **Edit Attribute**

When a user changes the type of attribute to complex, the complex attribute entity section opens up but the assignment type and justification fields are not displayed in the table.