

# **EPC Release Notes**

13.1 — Last update: May 06, 2022

Interfacing Technologies Corporation

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# 1. Release Notes 13.1

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The following major new enhancements and capabilities have been introduced in the 13.1 release.

Here's where to find:

- [What's New In EPC 13.1](#)
- [Process Maps Enhancements](#)
- [UI Enhancements](#)
- [Fixed Issues](#)
- [What's New In Process-Mining Parser](#)
- [What's New In the EPC Mobile App](#)

## 2. Disclaimer

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## 3. WHAT'S NEW IN 13.1

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The following major new features have been introduced in this EPC 13.1 release:

[Document Management Enhancements](#) | Mass Folder Upload for Documents, Mass Document Download as a Zip Folder with Structure and Document Type Icons.

[Swimlanes map added to quickly create a new process](#) | A Swimlanes map has been added to the New Process form.

[Custom user defined attributes \(UDAs\) per environment](#) | Environment Admins can now separate their environment attributes from system attributes.

[Additional audit trail document in PDF format](#) | Audit Trails can now be downloaded in a PDF format.

[Synchronization of changes from global to local](#) | This feature lets editors easily apply changes from a “Source” flow object to the equivalent “Local” flow object at once.

[Integration to trigger training requests directly in Interfacing training app](#) | Users can view their training information in EPC, when assigned to them in the Training app (DBP).

[Visibility of approval and endorsement cycles tracking through version history](#) | Users can now track an object's approval and endorsement cycle in the Version History section.

[Ability to generate books for all objects](#) | The feature of book generation is now extended to set and folder level in all EPC modules, in the Graph and Details page.

[Unpublishing](#) | In the details page of a published object, the button “unpublish” will instantly withdraw the published version and put the object back in draft status.

[Option to Delete Default System Attributes](#) | Users can now decide to delete three of EPC's default attributes.

[Option to de-activate mass actions](#) | Admins can now choose to disable the Mass Approval, Endorsement and Confirmation.

[Revert from any draft \(in progress\) versions](#) | It is now possible to browse and revert draft versions.

[Process maps enhancements](#) | Swimlanes Header Resizing, Right to Left Language Compatibility Extended to Set Level Maps, Ability to Position Assets & Artifacts Independent of RASCI-VS in Swimlanes Map, Font Changes in Swimlanes and Matrix Maps, Automatically Save Auto Reroute Button Value and Auto Reroute Feature Optimization.

[UI enhancements](#) | List Page Redirection When Clicking on Set/Folder in List Page, Right Click Actions –

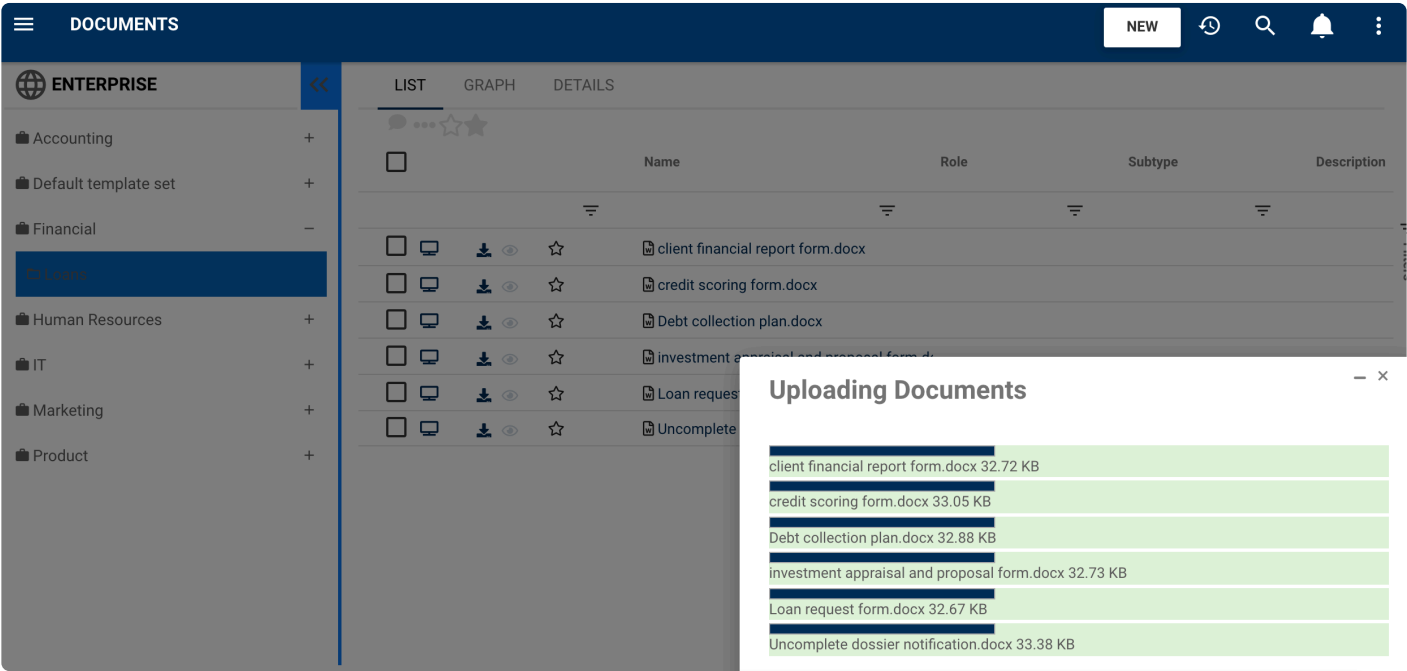
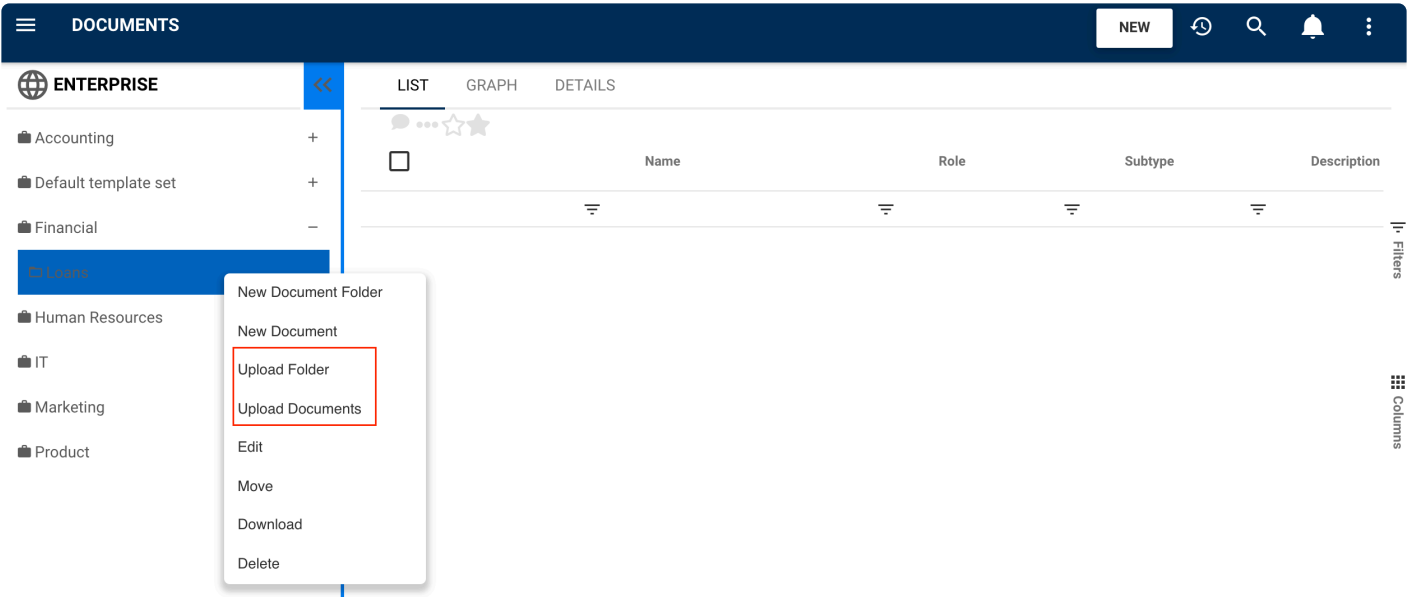
Security, Object Details Expand (+) Added to All Modules, Clearer Error Messages on Save, Process Book Generation in Impact and Hierarchy Graph Page and Only Custom Attributes Fields That Contain Data Are Shown.

[CKEditor security update](#) | CKEditor has been updated to the latest version.

# 3.1. Document Management Enhancements

## Mass Folder Upload for Documents

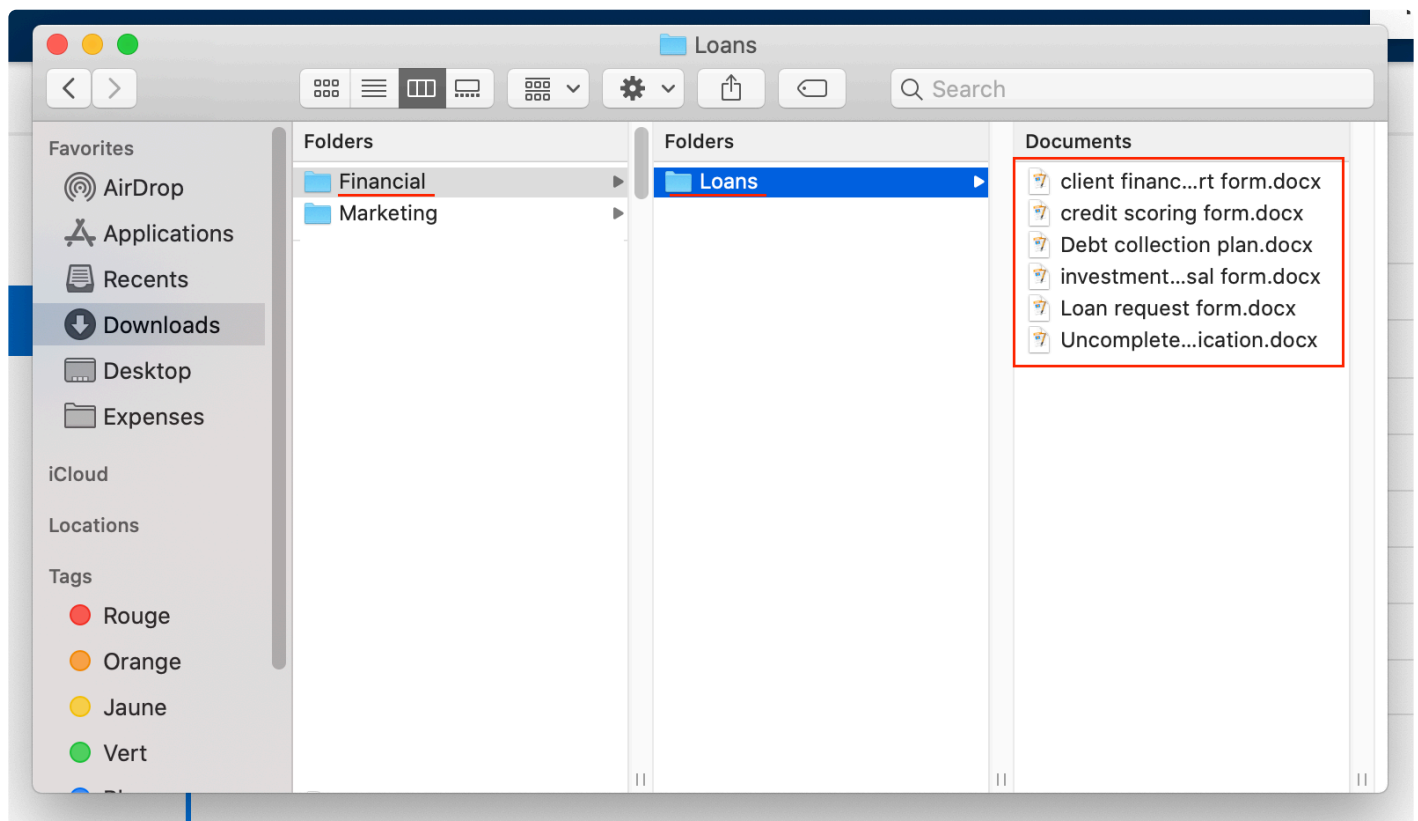
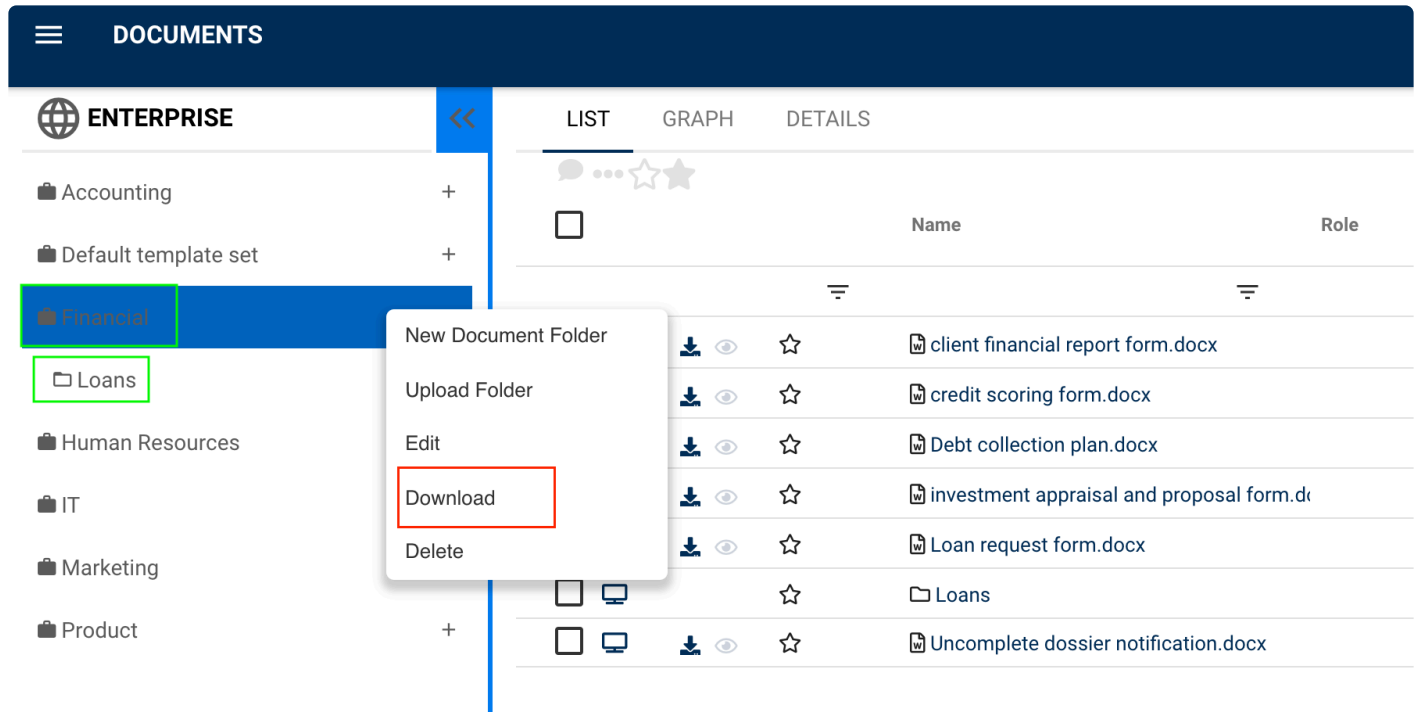
Uploading and creating new documents just got faster with the new mass upload feature. In just a few clicks, users can select several files or folders to upload and it will automatically create documents while preserving the hierarchy.



## Mass Document Download as a Zip Folder with Structure

With the mass document folder and set download feature, the task of downloading multiple documents is


made more efficient, as they will be downloaded as ZIP files. The folder structure will be preserved, to keep records regarding specific projects intact and downloaded all in one. This new feature is accessible through the Documents module hierarchy tree by right clicking on any document set or folder.




## Document Type Icons







Right before the name of files in the Documents module and in the “My Documents” widget, users will see different icons based on the file type. This allows users to visually identify what type of document it is.




## DOCUMENTS

















































LIST   GRAPH   DETAILS





### Name

					 Beginner guide.docx
					 Contries Impacted.numbers
					 Guidelines.pdf
					 Market translations.xls
					 Market.pdf
					 Review of searches template.xls
					 Searches completed.xls
					 Target markets.numbers

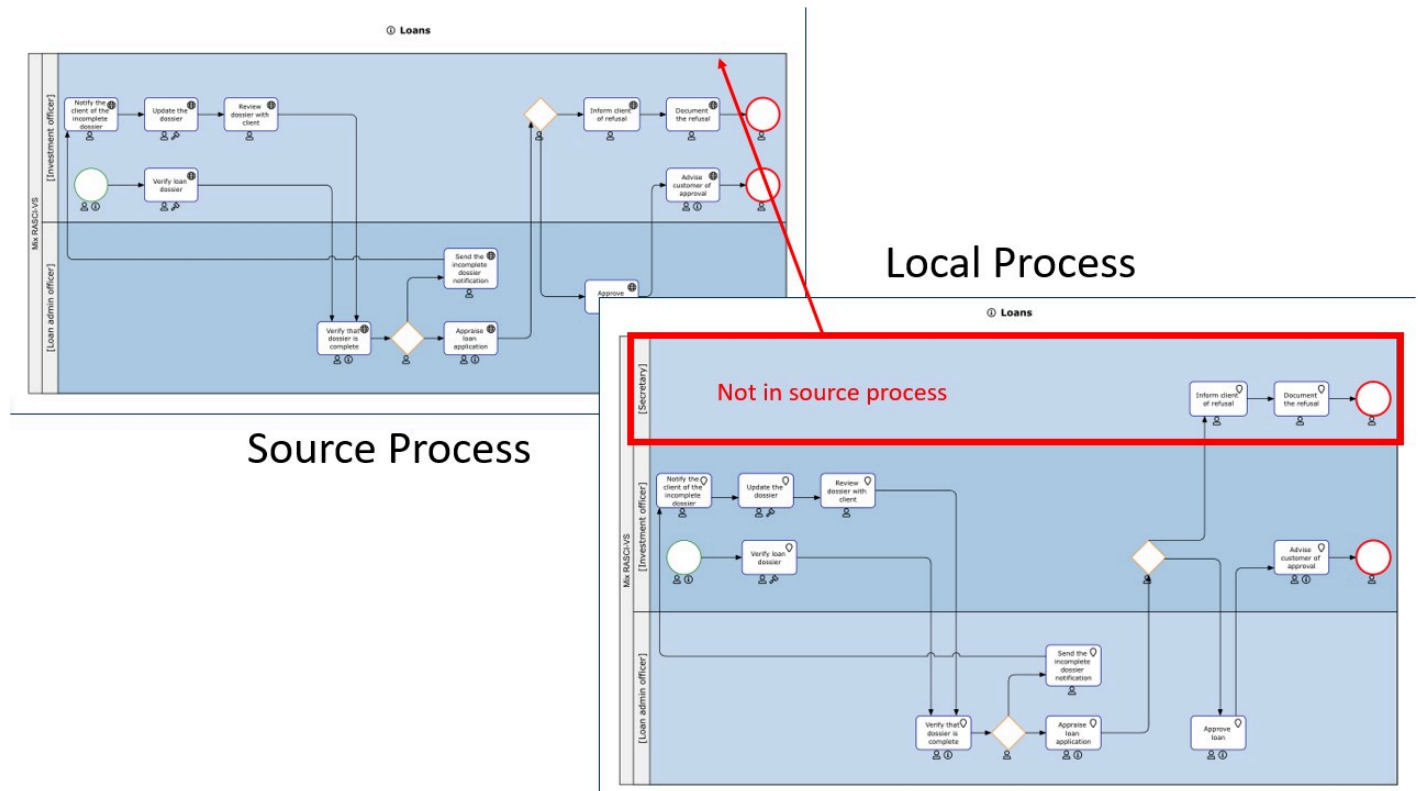
## 3.2. Synchronization of Changes from Global to Local

Localization has become a complex business need for organizations that operate in several countries, sites or subsidiaries and that have different machinery, departments, software products and much more. But, too much time and effort is spent tracking new information: adding, editing, deleting from “source” to “local” processes without any mistakes, making it difficult to have correct and up-to-date data.

With the new Synchronization of Changes from Global to Local feature, propagation of data from a source process to some or all local processes is automatic. On the other hand, data that does not need to be synced remains intact, allowing efficiency and above all, control.

This new functionality will allow you to:

- Pick and choose which Local flow objects will be synced with the Source flow objects.
- Apply changes from Source tasks to Local tasks using a matrix for changes and synchronizations at the attribute level.



## 3.3. Unpublishing

Unpublishing objects is now possible with a single click of a button. The new feature will instantly withdraw any published version of an object and put it back in draft status.

The image illustrates the unpublishing process in two stages:

**Published Object:** The left screenshot shows the '8.0 Manage Financial Resources' object in the 'DETAILS' view. The 'Tools' menu is open, and the 'Unpublish' option is highlighted. The version history table shows version 2.0000 as 'Published'.

Version Number	Status	Approval & Endorsement	Published Comment
2.0000	Published		
1.0000	Published		
0.0001	In Progress		

**Immediately After Unpublish:** The right screenshot shows the same object after the 'Unpublish' action. The status of version 2.0000 has changed to 'Unpublished'.

Version Number	Status	Approval & Endorsement	Published Comment
2.0000	Unpublished		
1.0000	Published		
0.0001	In Progress		

## 3.4. Integration To Trigger Training Requests Directly in Interfacing Training App

The Training Application in Digital Business Platform (DBP), Interfacing's other main software, is now integrated with EPC. Trainings created in DPB and associated to EPC object are reflected directly in EPC. Users or Trainees can find and access their pending trainings in the To Do module or directly from the object requiring a training.

Seq #	Name	Parent Name	Action Type	Type	Pending Sir
	[Executive Office] Strategy Planning	F - Executive Office	Training	Process	14-Mar-20
	[Executive Office] Strategy Planning	F - Executive Office	Training	Process	14-Mar-20
01.02	Business Continuity Planning (BCP)	Critical to Business Continuity	Training	Process	14-Mar-20
	Customer Journey Mapping	High-Level functions	Training	Document	14-Mar-20

Training Required

Training to complete before 2022-04-03 for version 1.0000

Training to complete before 2022-04-23 for version 0.0001

Take the training

### [Executive Office] Strategy Planning

#### ▼ Description

Strategic planning is a process in which organizational leaders determine their vision for the future as well as identify their goals and objectives for the organization. The process also includes establishing the sequence in which those goals should fall so that the organization is enabled to reach its stated vision.

- > Goal
- > Custom Attributes
- > Summary
- > SIPOC

## 3.5. Custom User Defined Attributes (UDAs) Per Environment

Environment Admins can now define specific User Defined Attributes (UDAs) for each environment. This increases clarity by displaying UDAs based on the needs and functions of each environment and preventing to show unrelated ones. The difference between Environment and System UDAs is preserved, including during the Import or Export process.

**Environment 1**

**What are the Attributes?**

Attribute	Value
Department	PROCUREMENT
Maintenance or Renewal Date	17 00:00:00
Process Customers	DELIVERY OPERATIONS
Quality Check Status	PASSED
Vendor Name	Enterprise Vendor

Cancel Save & Close

**Environment 2**

**What are the Attributes?**

Attribute	Value
Maintenance or Renewal Date	20 04:00:00
Process Customers	DELIVERY OPERATIONS
Product Type	SERVICE
Retail Value	80 USD United States dollar

Cancel Save & Close

Environment Attributes

Environment Attributes

## 3.6. Option to Delete Default System Attributes

Users has now the possibility to delete the three of EPC's default system attributes (Active Time, Average Cost and Average Time).

### Attributes

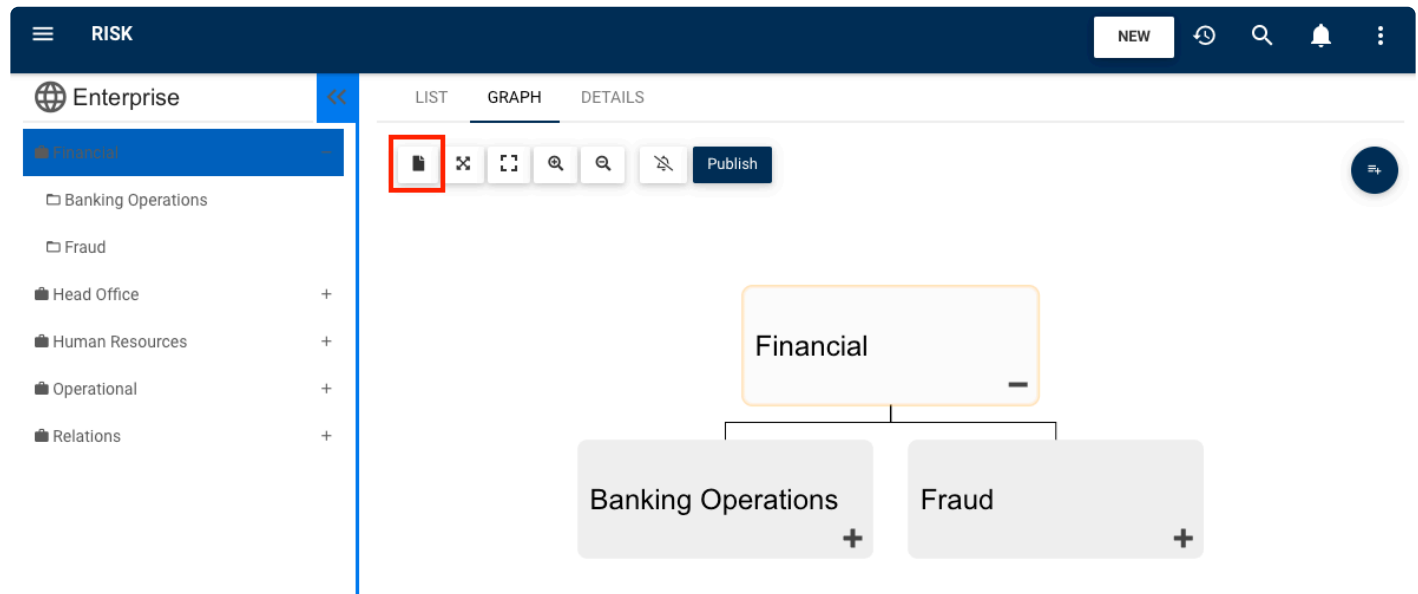
[+ Add New Attribute](#)

Name ▲																
	Asset	Attribute	Control	Document	Entity	Flow object	KCI	KPI	KRI	Objective	Org Unit	Process	Resource	Risk	Role	Term
average x																
Average Cost	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Average Cost (UDA Type: Currency)	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Average Time	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

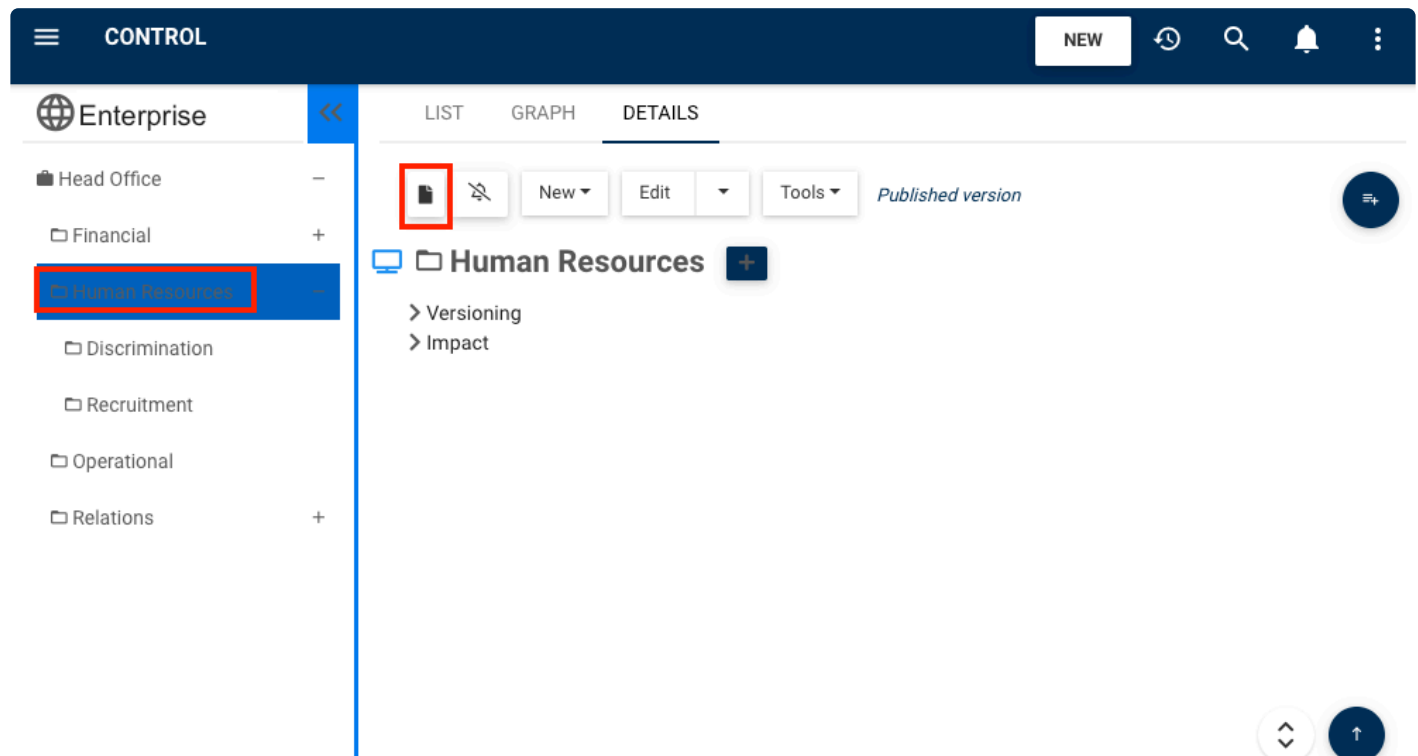
## 3.7. Ability to Generate Books For All Objects

The book generation feature is extended to any type of object and to all EPC modules.

### 1. “Generate Book” button on the Graph page of a Risk **Set**:



### 2. “Generate Book” button on the Details page of a Control **Folder**:



## 3.8. Option to De-activate Mass actions (Approvals, Endorsements & Confirmations)

Admins can now choose to disable the Mass Approval, Endorsement and Confirmation features of the To Do module to match their compliance needs.

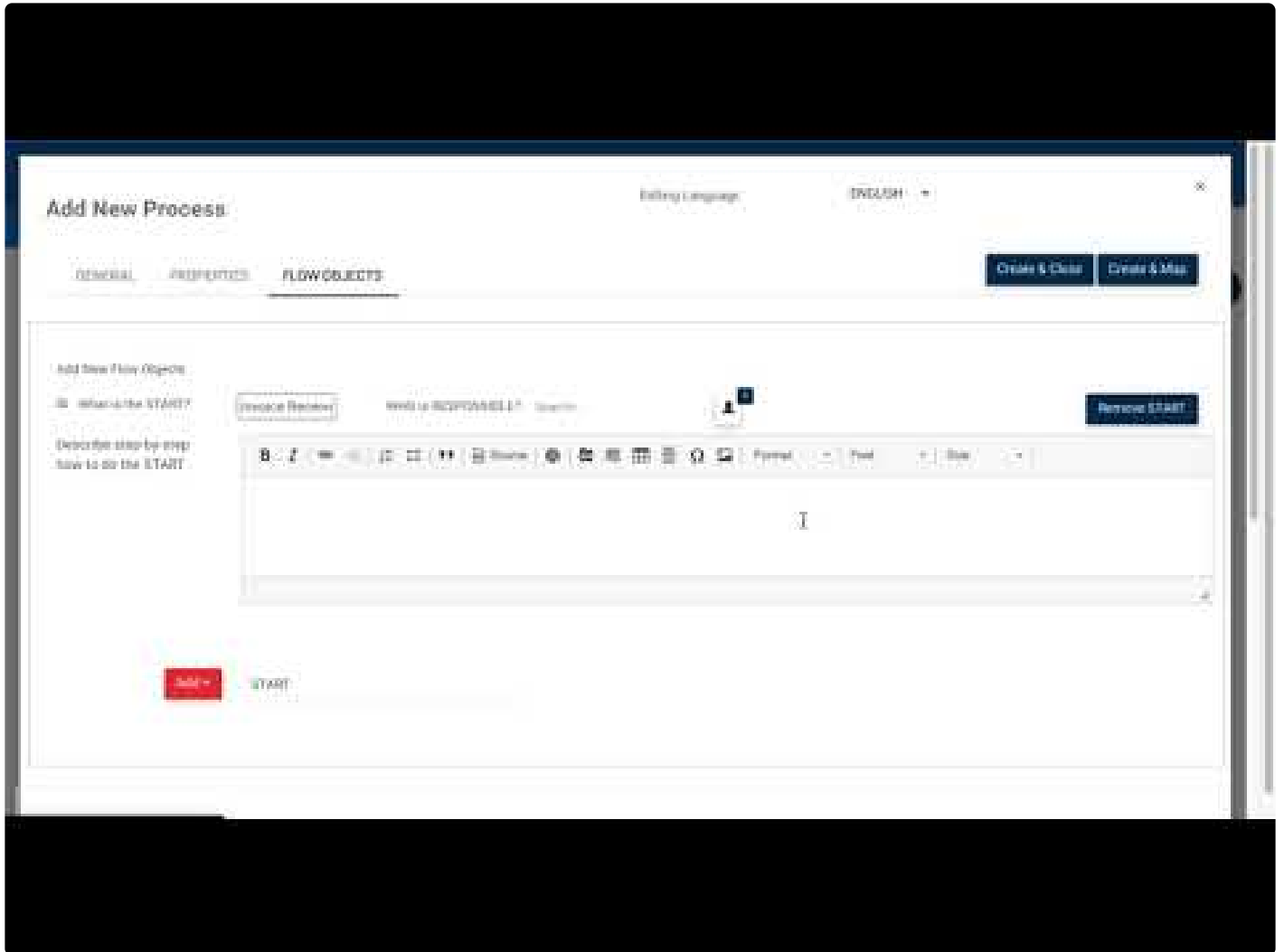
The screenshot displays the 'TO DO' module interface. At the top, a dark blue header bar contains a menu icon and the text 'TO DO'. Below this, a light blue bar shows 'EPC' and 'DBP' tabs. A red arrow points to a notification box on the right that says 'User cannot approve that object' with a close button. Below the notification, there are several colored boxes indicating task counts: 'Over Due 0' (red), 'Due Today 0' (orange), 'Due Soon 0' (green), 'Training 0', 'Confirmation 0', 'Approval 3', 'Endorsement 0', 'IR to Implement 0', 'IR to Review 0', 'IR to Publish 0', 'Update to Review 0', and 'Data Harmonization 0'. Below these boxes is a table with columns: Seq #, Name, Parent Name, Action Type, Type, and Pending Sir. The table contains three rows of data, each with a checkbox in the first column. The first row is for 'Market research' (Marketing, Approval, Process, 21-Mar-20). The second row is for 'Identity theft and account takeover' (Fraud, Approval, Risk, 02-Mar-20). The third row is for 'Manage External Relationships' (External Relationships, Approval, Process, 01-Apr-20).

Seq #	Name	Parent Name	Action Type	Type	Pending Sir
<input checked="" type="checkbox"/>	Market research	Marketing	Approval	Process	21-Mar-20
<input checked="" type="checkbox"/>	Identity theft and account takeover	Fraud	Approval	Risk	02-Mar-20
<input checked="" type="checkbox"/>	Manage External Relationships	External Relationships	Approval	Process	01-Apr-20



## 3.9. Swimlanes Map Added to Quickly Create a New Process

A live Swimlanes Map has been added in the New Process form and users can now see in real time what their process looks like when adding creating flow objects.



<https://www.youtube.com/embed/70gvPFKR5as?rel=0&autoplay=1>

## 3.10. Approval & Endorsement Cycle History Per Version

The data on approval and endorsement cycles has been made available for each version of an object including past versions to allow users to track those cycles throughout its life.

>>

LIST

GRAPH

DETAILS

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v

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New

Edit

Tools

Published version

Budgeting

> Description

> Goal

> Responsibilities

> Strategy & Performance

> Custom Attributes

> SIPOC

> Versioning

> Current Version

Version Number: 3.0000

Last Modified: a month ago

Completed Endorsement Cycle

>

Approved

>

> Version History

Version Number	Status	Approval & Endorsement	Published Comment	Author	Date
3.0000	Published			John Smith (john.smith)	January 6, 2022 11:21 AM
<a href="#">2.0003</a>	Approved			John Smith (john.smith)	January 6, 2022 11:18 AM
<a href="#">2.0002</a>	In Progress			John Smith (john.smith)	January 6, 2022 11:13 AM
<a href="#">2.0001</a>	In Progress			John Smith (john.smith)	January 6, 2022 11:13 AM
<a href="#">2.0000</a>	Published			John Smith (john.smith)	January 6, 2022 11:13 AM
<a href="#">1.0000</a>	Published			John Smith (john.smith)	January 6, 2022 11:05 AM

## Approval & Endorsement

Version Number: 3.0000

### Completed Endorsement Cycle

#### Published

 Budgeting.docx.pdf  

Serial Approval Cycle



Approved by: John Smith (john.smith)

a month ago



## 3.11. View & Revert Saved Draft Versions

It is now possible to browse and revert draft versions. The “Browse Version” button in “Tools” has been removed from details page, and all versions are instead accessible and restorable in the version history section of an object.

**PROCESS**

Navigation: < ^ v > | New | Edit | Tools | Publish | Show Published

**Problem Resolution** [Draft]

- ▼ Description
  - Problem solving is the **act of defining a problem**; determining the cause, analyzing, prioritizing, and selecting alternative solutions.
- > Goal
- > Responsibilities
- > Custom Attributes
- > SIPOC
- ▼ Versioning
  - ▼ Current Version
    - Version Number: 1.0001
    - Last Modified: a few seconds ago
  - ▼ Version History

**Original Version**

Version Number ▼	Status	Approval & Endorsement	Published Comment
1.0001	In Progress		Ma
<a href="#">1.0000</a>	Published		Ma
<a href="#">0.0004</a>	In Progress		Ma
<a href="#">0.0003</a>	In Progress		Ma
<a href="#">0.0002</a>	In Progress		Ma
<a href="#">0.0001</a>	In Progress		Ma

PROCESS

>>

LIST

GRAPH

DETAILS

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v

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New ▾

Edit ▾

Tools ▾

Publish

Show Published

Problem Resolution

+

Draft

> Custom Attributes

> SIPOC

> Versioning

> Current Version

Version Number: 1.0003

Last Modified: a few seconds ago

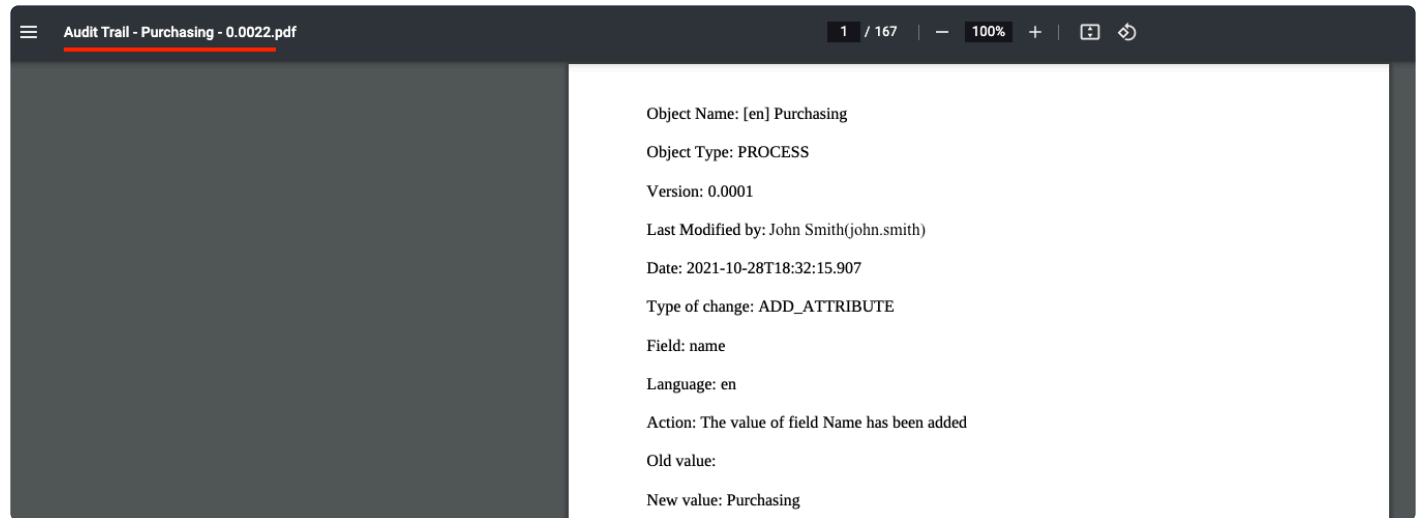
> Version History

After Revert

Version Number ▾	Status	Approval & Endorsement	Published Comment
1.0003	In Progress		Mar
<a href="#">1.0002</a>	In Progress		Mar
<a href="#">1.0001</a>	In Progress		Mar
<a href="#">1.0000</a>	Published		Mar
<a href="#">0.0004</a>	In Progress		Mar
<a href="#">0.0003</a>	In Progress		Mar
<a href="#">0.0002</a>	In Progress		Mar
<a href="#">0.0001</a>	In Progress		Mar

## 3.12. Additional Audit Trail Document in PDF Format

Audit Trails can now be downloaded in PDF format so that users have the option to choose the format that is preferable for them, between Excel or PDF. Additionally, the PDF Audit Trail is a great way to facilitate the reporting task of users.



## 3.13. Process Maps Enhancements

### Swimlanes Header Resizing

Changes users make to their Swimlanes graph headers in Edit mode will now save without automatic adjustments from EPC to maintain the most optimal configuration for the user. – to REVIEW before/after



<https://www.youtube.com/embed/lvz0LYomBXg?rel=0>

### Right to Left Language Compatibility Extended to Set Level Maps

Set level process maps are now compatible with languages written from right to left such as Arabic, Farsi and Hebrew. EPC automatically re-arranges the map in order to provide a better map visibility for users reading their processes in one of these languages.

عملية

الجديد

القائمة المخطط الرسومي التفاصيل

منتهج

المشتريات

القواتير

اختبار منتج جديد

إنشاء عملية منتج جديد

شراء

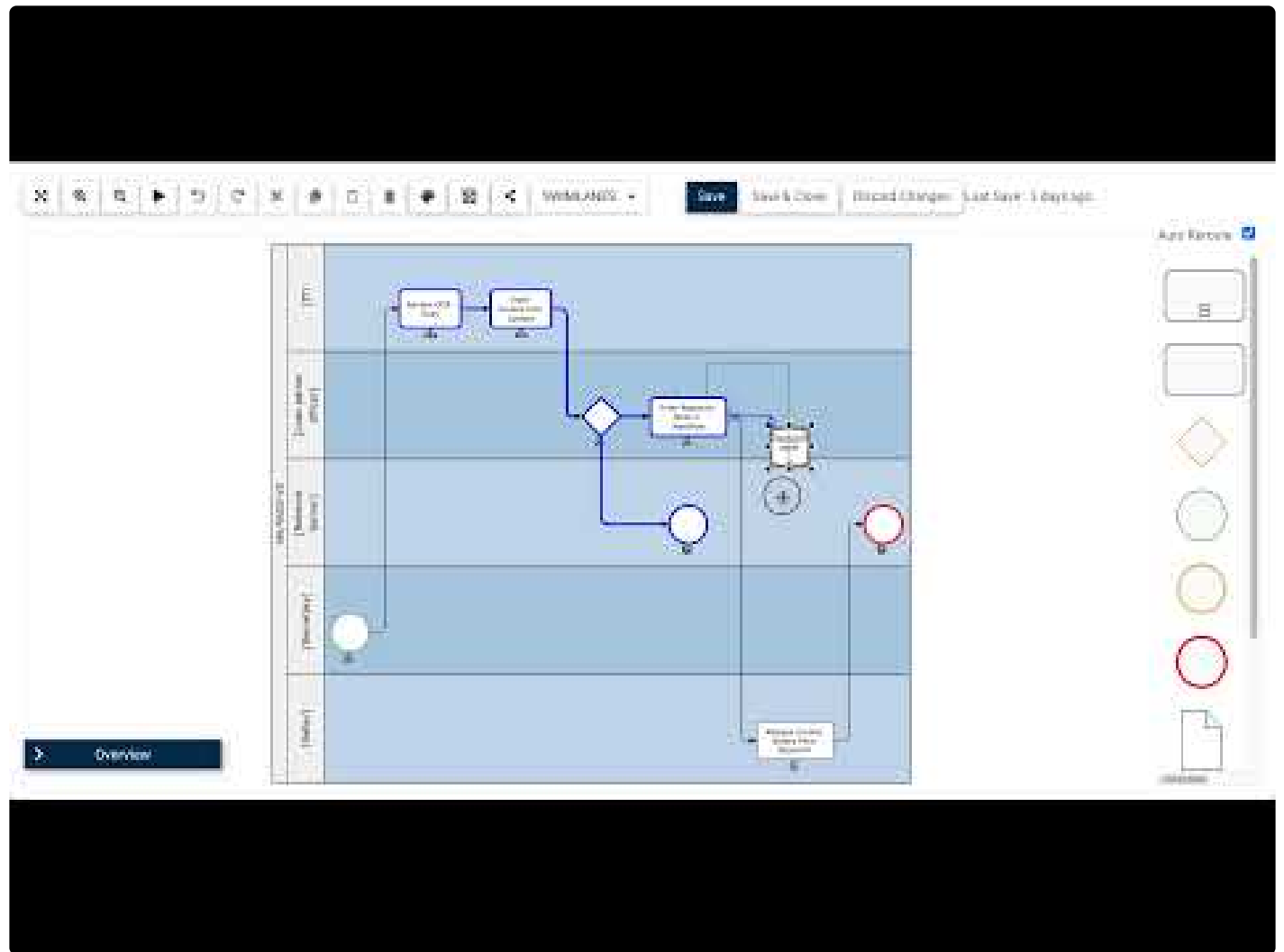
تحقق من الجودة

نظرة عامة

### Ability to Position Assets & Artifacts Independent of RASCI-VS in Swimlanes Map

Position Assets and Artifacts anywhere in Swimlanes graphs, independent of RASCI-VS (roles, responsibilities), making your maps organized and with a clear view of the assets or artifacts used to facilitate the respective tasks.

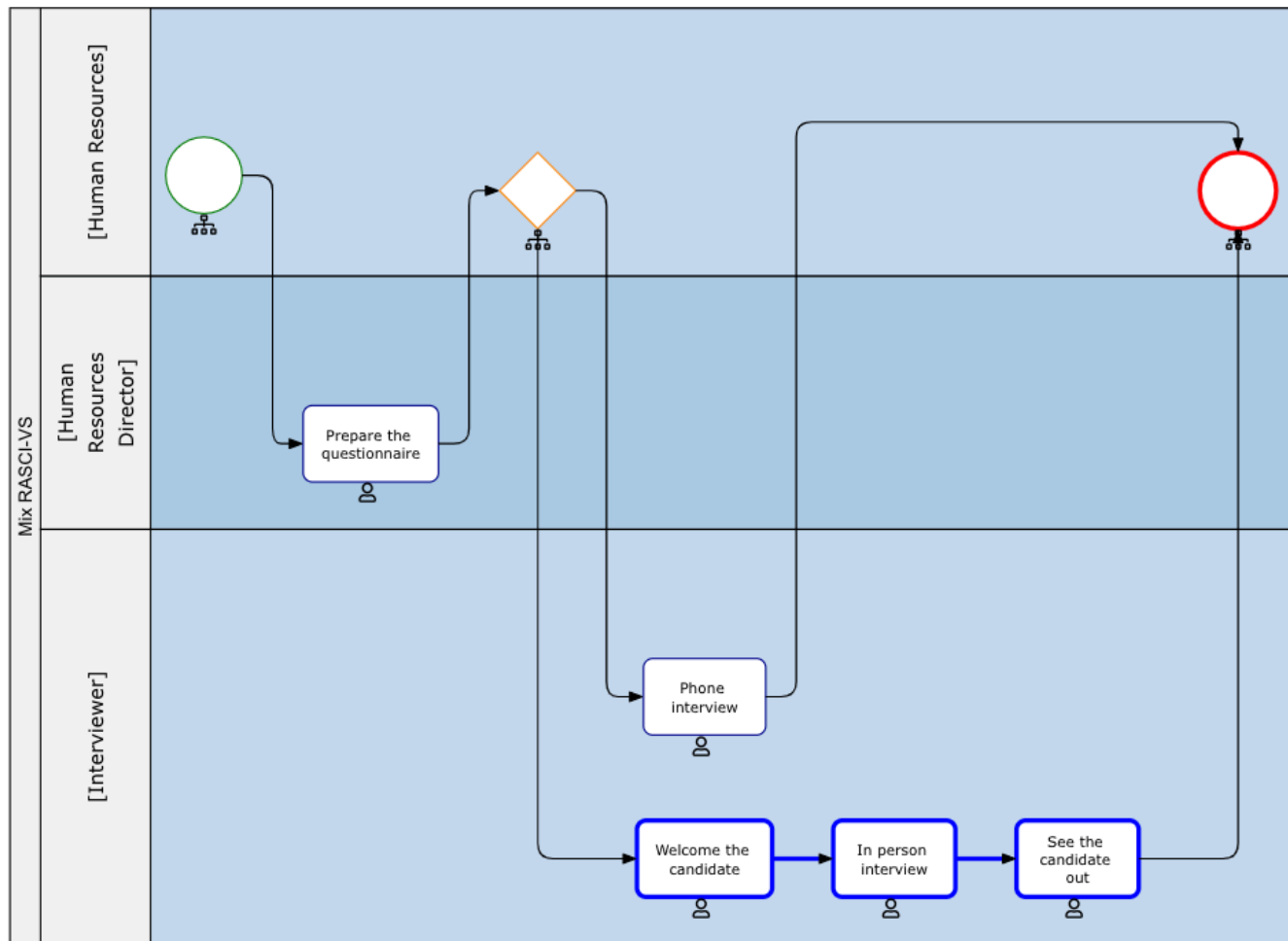




<https://www.youtube.com/embed/9711ev9thEw?rel=0&autoplay=1>

## Font Changes in Swimlanes and Matrix Maps

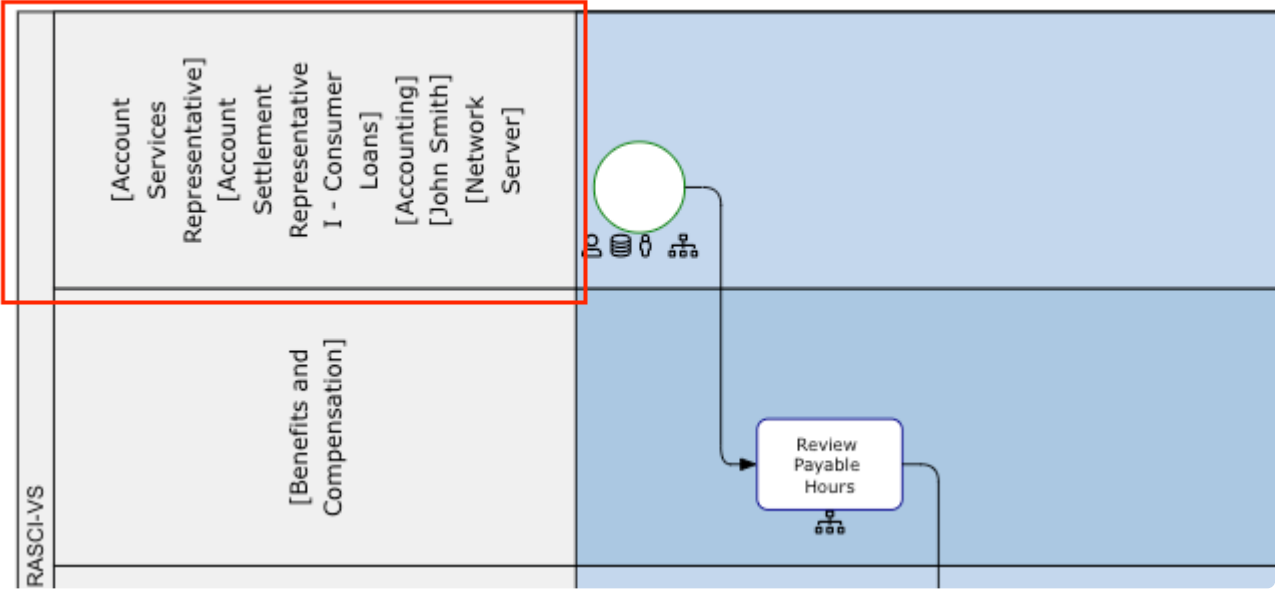
The font of headers (e.g: roles, resources, categories, etc) in Swimlanes and Matrix maps have been enlarged and the grey header background is now lighter, making the reading experience better and easier for all users.

**Job Interview Procedure****Automatically Save Auto Reroute Button Value**

Users can now **save** their preferences to turn automatic graph redirection (Auto Reroute) on or off, meaning that the preferred option will be kept, even if users are going to edit another process map.

**Auto Reroute Feature Optimization**

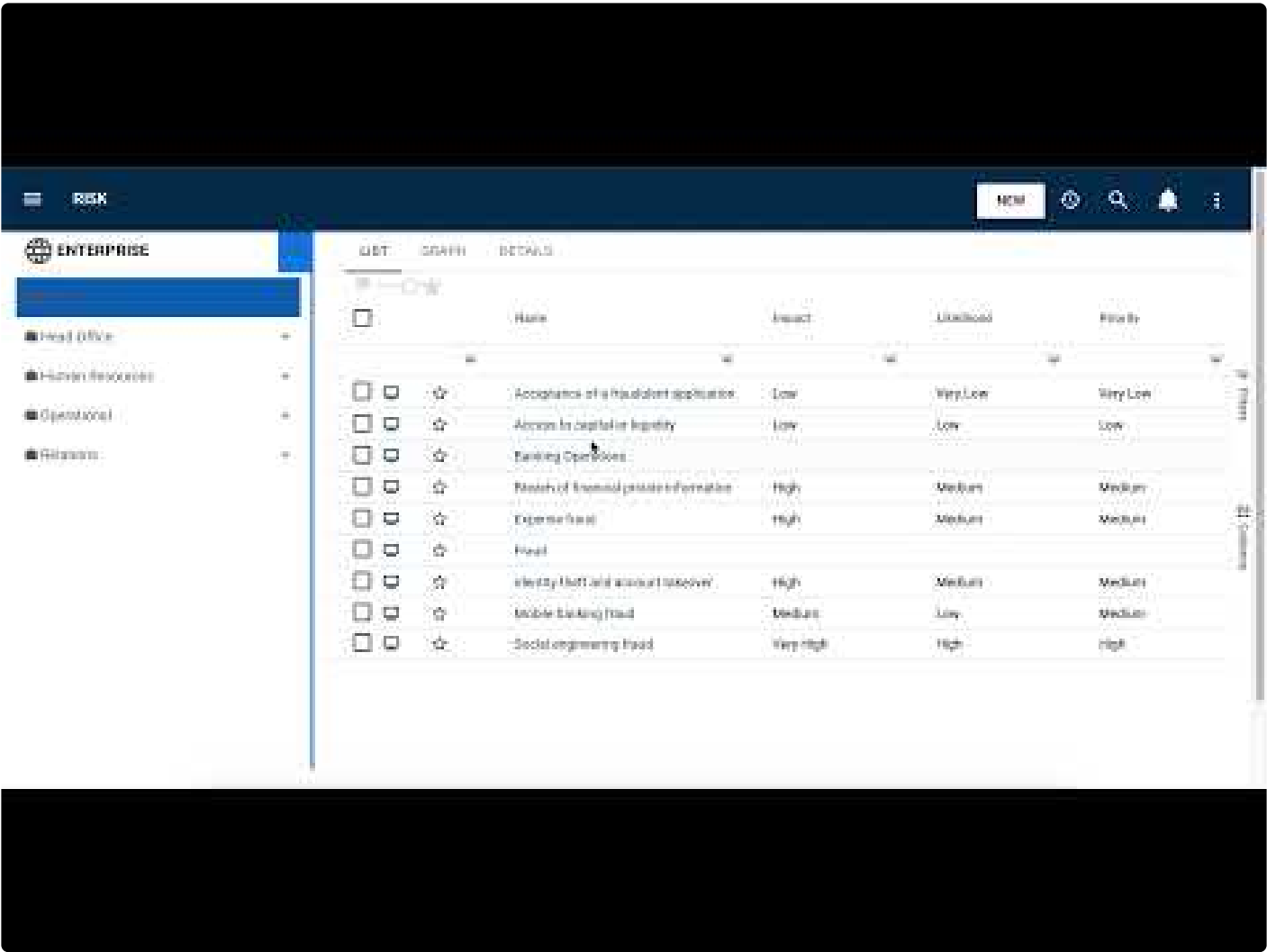
The Auto Reroute button in Edit mode is now improved as the header text of Swimlanes graphs is now always contained inside the header boxes to increase the clarity and readability of process maps.



# 3.14. UI Enhancements

## List Page Redirection When Clicking on Set/Folder in List Page

EPC now redirects users to the List page page when clicking on a set or folder instead of redirecting to the Details tab to facilitate the navigation. This also applies to the search autocomplete and search results.



<https://www.youtube.com/embed/egcwleWjtDw?rel=0&autoplay=1>

## Right Click Actions – Security

The new option “Security” is added to the right click actions in the hierarchy trees, in all modules, to make it easier for users to change security settings.

The screenshot shows the 'ORGANIZATION' module interface. On the left, a sidebar lists various organizational units: Head Office, Accounting, Billing, Financial, Head Office, IT, and Marketing. The 'Head Office' unit is selected, and a context menu is open over it. The menu options are: New Org Unit, Edit, Security (highlighted with a red box), Copy, and Delete. In the background, a table lists organizational units with columns for Name, a star icon, and a list icon. The table includes entries like 'Account Settlement Representative I - C', 'Account Settlement Representative III -', 'Accountant', 'Accounting', and 'ACH alert positive pay (mainframe)'.

### Object Details Expand (+) Added to All Modules

The expand button (+) is now added all EPC modules in the Details page. With it, users can expand the children objects of any set, folder or parent object in their respective Details page, to see all their children objects (if applicable).

The screenshot shows the 'CAPABILITY' module interface. The left sidebar lists 'Enterprise', 'Banking Operations', 'Manage Bank Accounts' (selected), and 'Basic Services'. The main area displays the 'DETAILS' view for 'Manage Bank Accounts'. A red box highlights a minus sign icon (-) next to the object name. Below the object name, there are expandable sections for 'Responsibilities', 'Custom Attributes', 'Versioning', and 'Impact'. Further down, there are two more objects: 'Daily posting of transactions' and 'Manage overdraft limits and loan accounts', both with a plus icon (+) and a '[Draft]' label. The bottom right corner shows navigation icons for back, forward, and search.

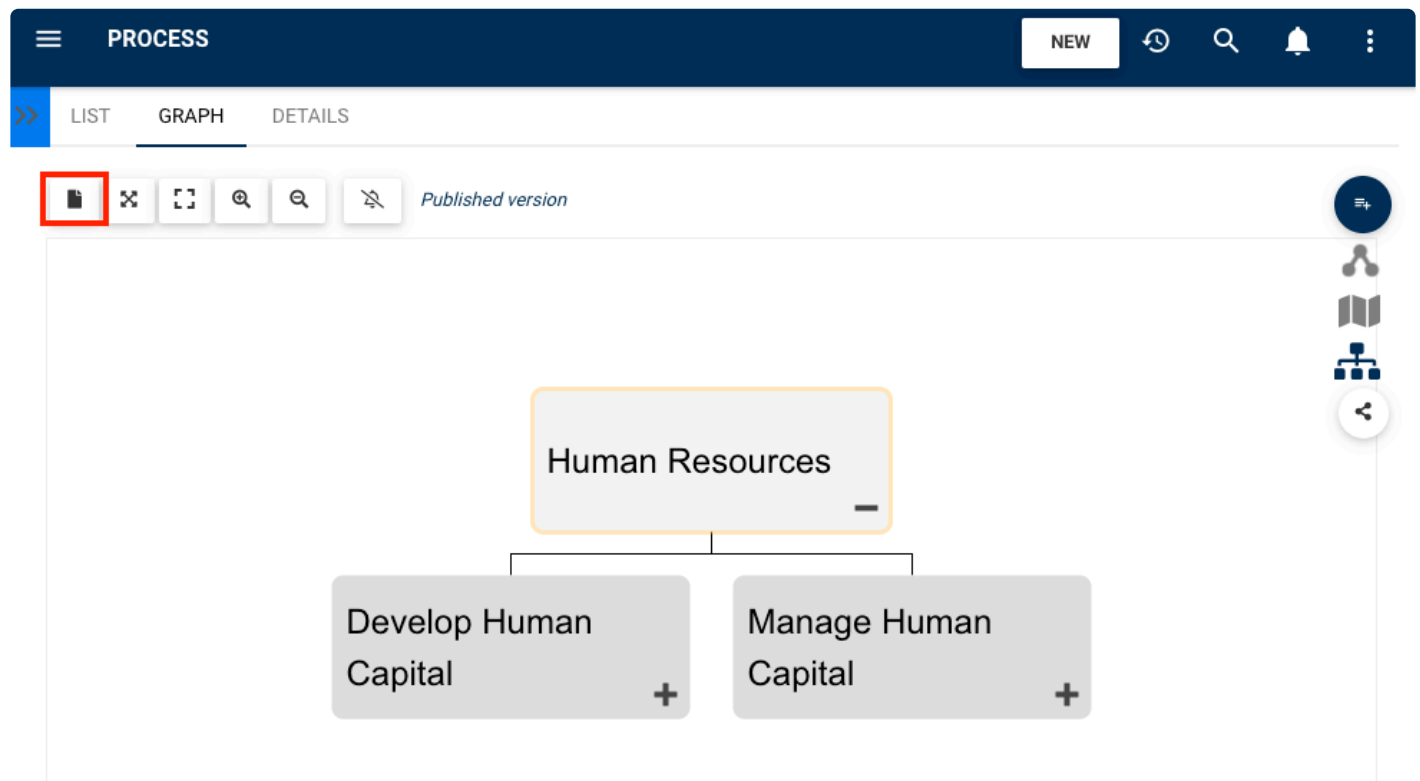
### Clearer Error Messages on Save

The default error message when there is an unexpected error when saving an object is now changed to “An error has occurred” to avoid user confusion.

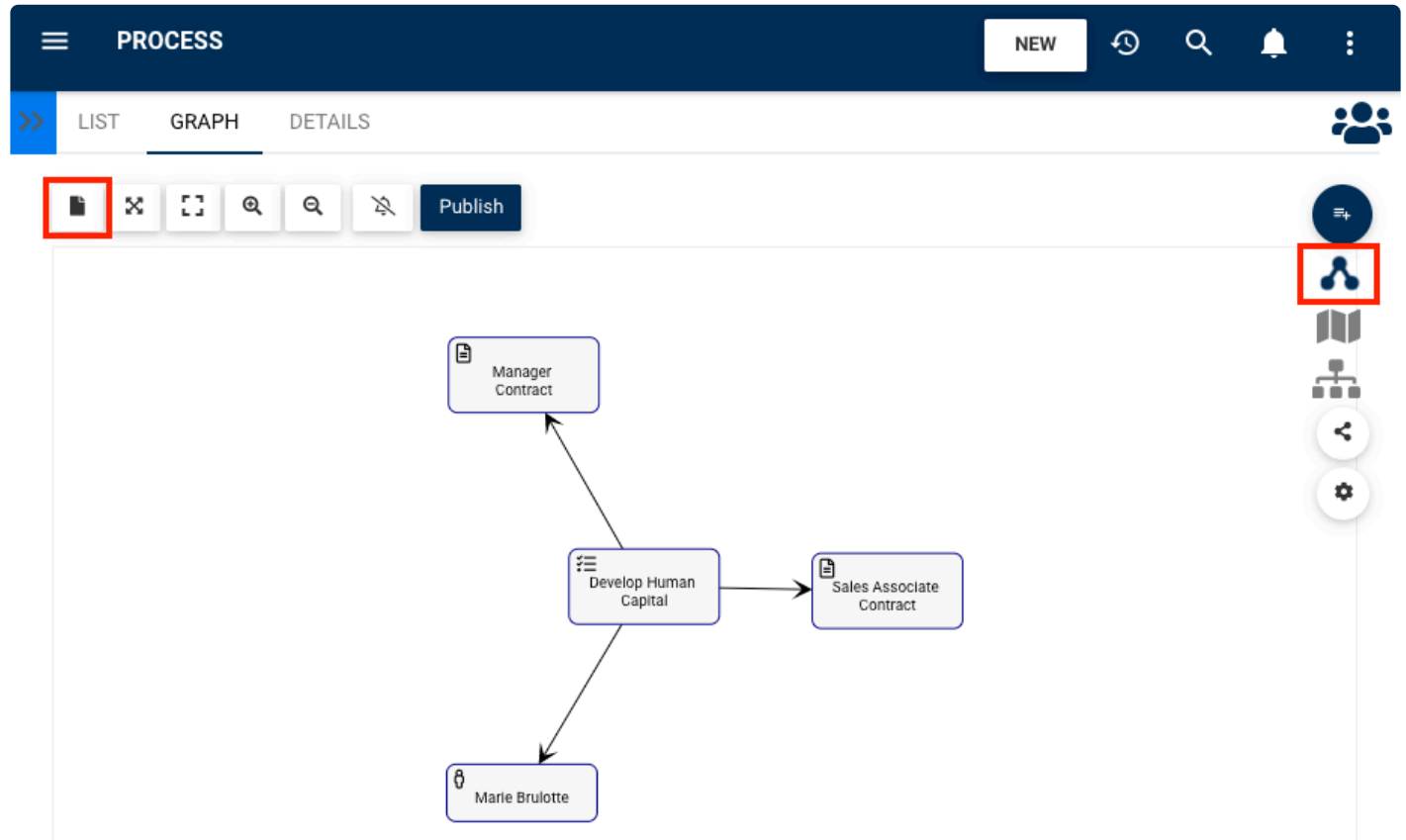
## Process Book Generation in Impact and Hierarchy Graph Page

Efficiently generate process books directly in the Impact or Hierarchy Graph page to minimize navigation time for creating process books.

### Hierarchy Graph:



## Impact Graph:



### Only Custom Attributes Fields That Contain Data Are Shown

The custom attributes section in the details page of any EPC object now only displays attribute fields that contain data to declutter and simplify the display of this section so that users can easily identify relevant information.

PROCESS

NEW

ENTERPRISE

<<

LIST

GRAPH

DETAILS

Financial

+

Human Resources

+

Product

-

Billing

+

New product testing

Process creation for new pr...

Procurement

Purchasing

+

Quality check

Warehouse Operations

+

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v

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New

Edit

Tools

Publish

Purchasing

+

[Draft]

Identifier: PP-001

Description

The purchasing process is confined to obtaining goods and services from a supplier.

Custom Attributes

AVERAGE TIME	14 00:00:00
BUSINESS IMPACT	3
BUSINESS PRIORITY	High
DATA SENSITIVITY	Restricted
FRAUD RISK	Yes

> Subprocesses

> SIPOC

> Versioning

> Impact



## 3.15. CKEditor Security Update

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CKEditor has been updated to the latest version 4.17.1 to apply the latest security patches from the vendor.

## 4. FIXED ISSUES

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### Edit in Set Details Page

Fixed an issue where the “Edit Set” form would not open when users clicked the edit button in a set’s details page.

### Images in Document Description

Fixed an issue where users could not add more than 2MB of images in a document’s description field.

### Child Roles

Fixed an issue where child roles of other roles could not be assigned as an approver.

### Open Button Menu

Fixed an issue where the hierarchy icon was not selected by default when opening the menu in a Risk Graph page.

### Simulation Window

Fixed an issue where the simulation window was too small, it is now increased by 80%.

### Approval

Fixed an issue where users would try to send an object for approval in the Process module but the request would not load and send.

### Portuguese Translation

Fixed an issue where the Portuguese translation what not complete in the EPC.

### Double Capability Analysis Dropdowns

Fixed an issue where two toggle capability analysis dropdowns were in the Graph page of capability objects.

### SOP

Fixed an issue where maps were not displayed correctly in SOP documents when created with the “Generated from Template” function.

## Auto Layout

Fixed an issue where the auto layout from EPC V12.3.2 was not optimal for vertically extensive processes, as the inputs and outputs were overlapping and ineligible.

## 5. PROCESS-MINING PARSER

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The following major new enhancements and capabilities have been introduced in the 13.1 release for the Process-Mining Parser.

- [What's new in Parser](#)
- [Fixed Issues](#)

## 5.1. WHAT'S NEW IN PARSER

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The following major new features and enhancements have been introduced in this release:

[Process-Mining Parser extended to support MS Excel files](#) | Users can now parse Excel documents even with multiple tabs.

[Task color code tag](#) | Color codes have been added to Parser allowing users to tag colors to tasks.

[Support for attributes and category types](#) | All Attribute and Category types are now supported in Parser.

[UI enhancements](#) | “Add Rule” Button, Next and Previous Button Moved and Radio Buttons in Export Settings.

[Bulleted list parsing](#) | The objects tagged from a bulleted list inside table cell containing are now sanitized.

## 5.1.1. Process-Mining Parser Extended to support MS Excel files

Users can now parse Excel documents even with multiple tabs. The content can be tagged and exported for each tab.

**PARSER** ? ⋮

✓

Select Source

✓

Select Template

3

Label text fields

**HIERARCHY** **ASSOCIATIONS**

Loans

ACBS Loa...

Receive Loan...

Customer

ACH Alet P...

Verify Loan d...

Investmen...

ATM Switch

Connex

Verify that do...

Current Source(s)

Loan Process.xlsx

Current Template

Standard Process Template

Name of Process	Loans
Who is responsible?	ACBS Loan Syndications
Whats is the goal?	To ensure funds are available to fu
Overview of the process	Based on loan proposal and approva

Task Name	Role Name
Receive Loan Proposal	Customer
Verify Loan dossier	Investment Officer
Verify that dossier is complete	Loan admin officer
Appraise Loan Application	Investment Officer
Inform client of missing documentation	Investment Officer
Approve loan	Investment Officer
Advise customer	Investment Officer

Select Rules

AUTO TAGGING

PARSE

+ SAVE TEMPLATE

EXPORT

PREVIOUS

CLEAR ALL

## 5.1.2. Task Color Code Tag

Color codes have been added to Parser allowing users to tag colors for tasks. Once exported, users will see the corresponding color on each task in EPC.

The screenshot displays the EPC interface. On the left, a table lists tasks with their corresponding color codes. A red box highlights the 'Task Color' column. A red arrow points from the color code 'f0dc4e' to a task in the workflow diagram on the right.

Asset	Description	Task Color
ACH Alert Positive Pay	<input type="checkbox"/> Receive loan proposal in prescribed format. <input type="checkbox"/> Receive from Secretary	f0dc4e
ATM Switch-Connex	<input type="checkbox"/> Plan for using loans must be submitted to client <input type="checkbox"/> Plan for using loans must be reviewed	4ae468

The workflow diagram on the right shows a sequence of tasks: 'Receive loan proposal' (yellow box) followed by 'Verify loan dossier' (green box). A red box highlights the 'Receive loan proposal' task, which is linked to the color code 'f0dc4e' from the table.

## 5.1.3. Support for Attributes and Category Types

All Attributes and Category types are now supported when tagging the content of a document in the Parser.

The screenshot displays the EPC interface with the 'Select Source' dropdown menu open. The menu lists various categories: Process Set, Process, Sub Process, Task, Start Event, End Event, Intermediate Event, Gateway, Process, Organization, Performance, Rule, Risk, Control, Document, Master data, Glossary, and Capability. The 'Attributes' option is highlighted with a red box. The background shows a table with 'Role Name' and a list of roles: Customer, Investment Officer, Loan admin officer, and several instances of Investment Officer. A 'Label text fields' dropdown menu is also visible, showing options like Average Time to Finish Version, Vendor Name, and Additional Costs.

Role Name
Customer
Investment Officer
Loan admin officer
Investment Officer
Investment Officer
Investment Officer
Investment Officer



## 5.1.4. Bulleted List Parsing


The name of the objects tagged from a bulleted list inside table cell containing is now sanitized to prevent the bullet from being part of it.

HIERARCHYASSOCIATIONS

Process Set import

Receive loan proposal in pr...

Current Source(s)  
Loans Process (Parser).docx

  
interfacing.

### Loans Process

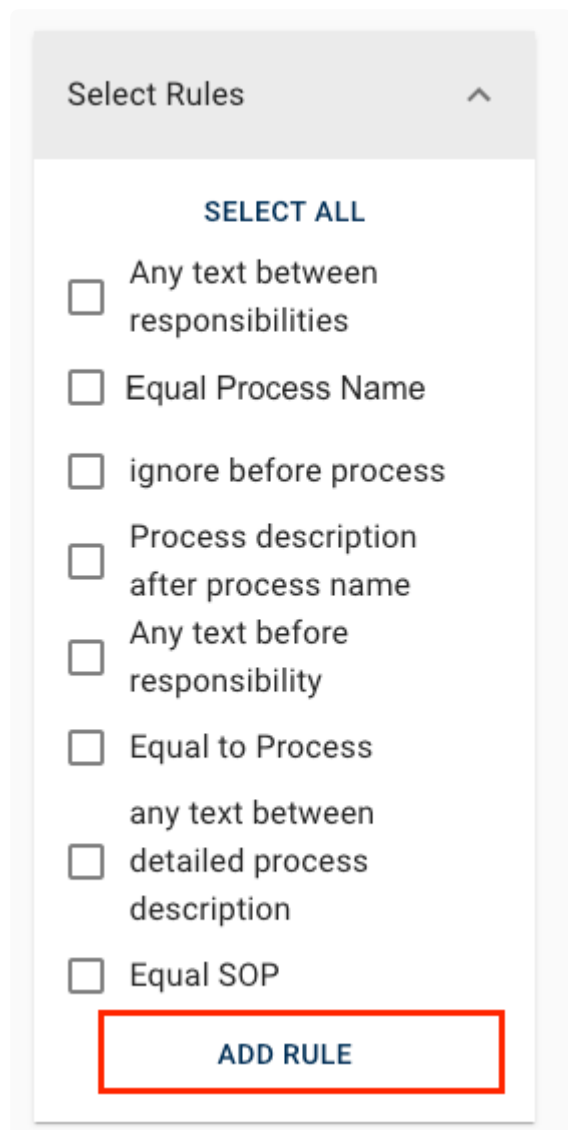
Name of task	Responsible	Asset	Description
Receive loan proposal	Investment Officer	ACH Alert Positive Pay	<div><div>Receive loan proposal in prescribed format.</div><div>Receive from Secretary</div></div>
Verify loan dossier	Investment Officer	ATM Switch-Connex	<div><div>Plan for using loans must be submitted to client</div><div>Plan for using loans must be reviewed with client</div></div>

## 5.1.5. UI Enhancements

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### “Add Rule” Button

The “Add Rule” button is added to the “Select Rule” drop-down list to make it easier for users to add rules without having to go to the Rule Builder.



The screenshot shows a dropdown menu titled "Select Rules" with an upward arrow icon. Inside the menu, there is a section labeled "SELECT ALL" in blue. Below this, there is a list of rules, each preceded by an unchecked checkbox:

- ☐ Any text between responsibilities
- ☐ Equal Process Name
- ☐ ignore before process
- ☐ Process description after process name
- ☐ Any text before responsibility
- ☐ Equal to Process
- ☐ any text between detailed process description
- ☐ Equal SOP

At the bottom of the dropdown menu, there is a blue button labeled "ADD RULE" which is highlighted with a red rectangular border.

### Next and Previous Button Moved

The “New” and “Previous” buttons are now moved to the bottom so that the buttons are always in the same place for consistency across the Parser and ease of use.

2

Select Template

3

Label text fields

Date Created ↓	Date Updated
3/16/2022, 11:08:49 AM	3/16/2022, 11:08:49 AM
3/11/2022, 12:10:47 PM	3/11/2022, 12:10:47 PM
3/11/2022, 12:08:19 PM	3/11/2022, 12:08:19 PM
3/1/2022, 1:32:23 PM	3/1/2022, 1:32:23 PM
12/8/2021, 10:33:35 AM	12/8/2021, 10:33:35 AM
12/7/2021, 4:38:51 PM	12/7/2021, 4:38:51 PM
12/20/2021, 9:12:06 AM	12/20/2021, 9:12:06 AM
1/14/2022, 10:25:45 AM	1/14/2022, 10:25:45 AM

Template name

+ CREATE NEW TEMPLATE

DELETE TEMPLATE

1 to 8 of 8

⏪

<

Page 1 of 1

>

⏩

🔗 NEXT

PREVIOUS

## Radio Buttons in Export Settings

There are now radio buttons in the Parser Export Settings menu instead of checkboxes, as users can only select one or the other.

×

EXPORT SETTINGS

ENVIRONMENT AND LANGUAGE

AUTOTAG SETTINGS

☒ Create new objects

When Exporting to EPC, all the tagged elements will be exported as new EPC objects

☐ Create and reuse

All existing EPC objects will be used if they were previously created and all new objects will be created

SAVE

## 5.2. FIXED ISSUES

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### Templates

1. Fixed an issue where templates did not save when users would tag objects and save their template before parsing.
2. Fixed an issue where the mass deletion of templates did not work for more than two templates at a time.

### Images

3. Fixed an issue where images were sometimes missing when a document with images was converted to the Parser.

## 6. EPC MOBILE APP

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The following major new features and enhancements have been introduced in this release:

- [What's new in EPC mobile app](#)
- [Fixed issues](#)

## 6.1. WHAT'S NEW IN EPC MOBILE APP

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The following major new enhancements have been introduced in the new EPC Mobile App:

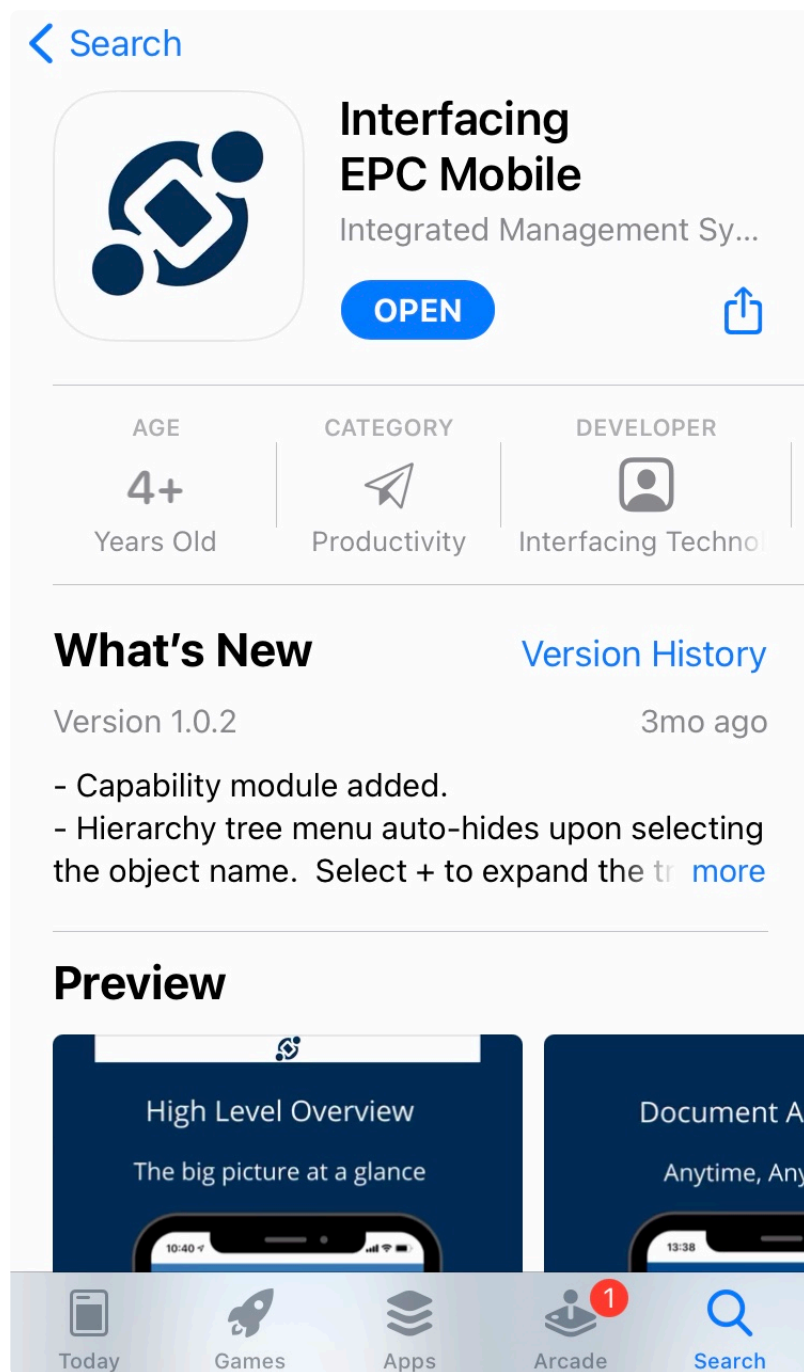
[Update of the app icon](#) | The mobile application icon is updated.

[Header icons](#) | Mobile App header icons are no longer cut off by the user's phone header icons.

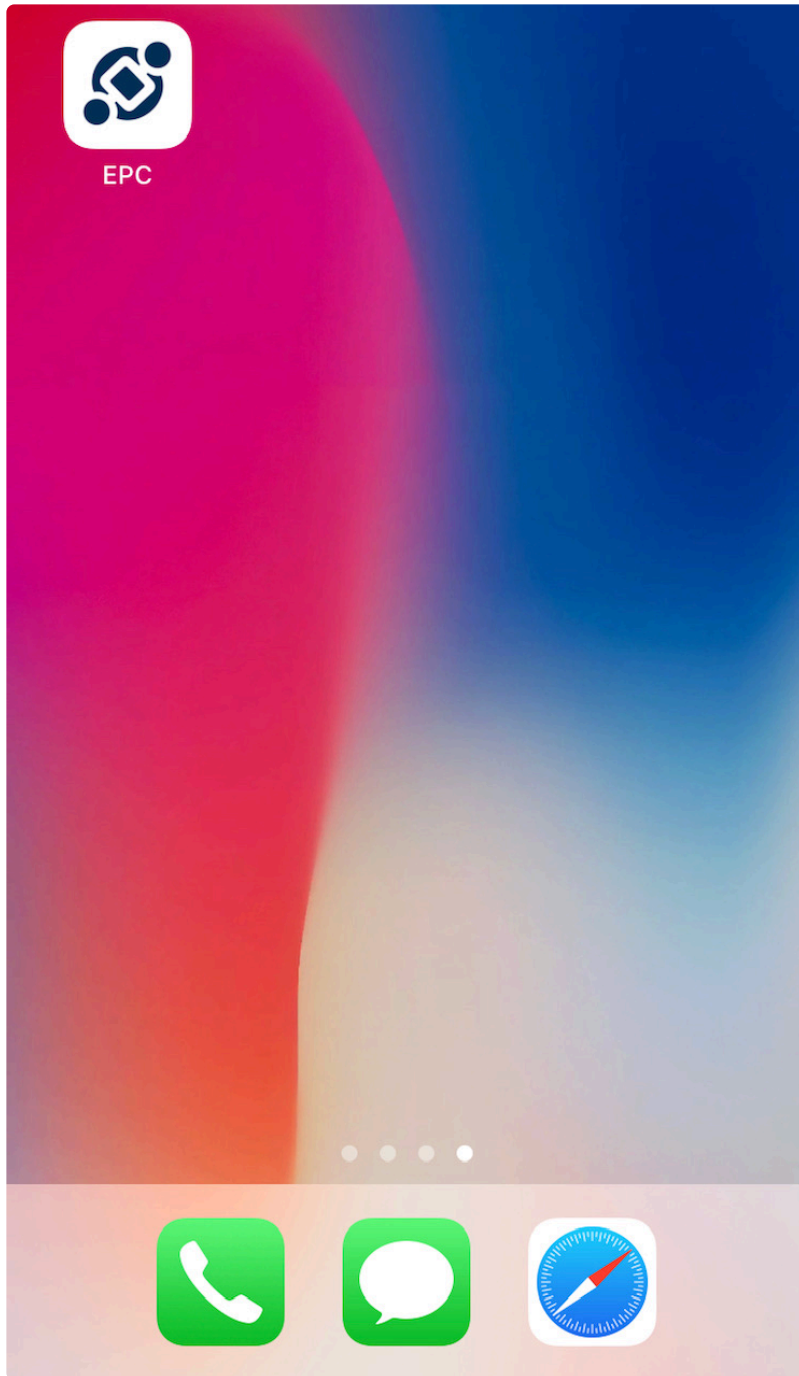
[Offline deleted processes](#) | Processes deleted in the WebApp are now automatically deleted in the Mobile App regardless of whether users are in online or offline mode.

## 6.1.1. Update of the App Icon

The mobile application icon is updated for Android and iOS phones.

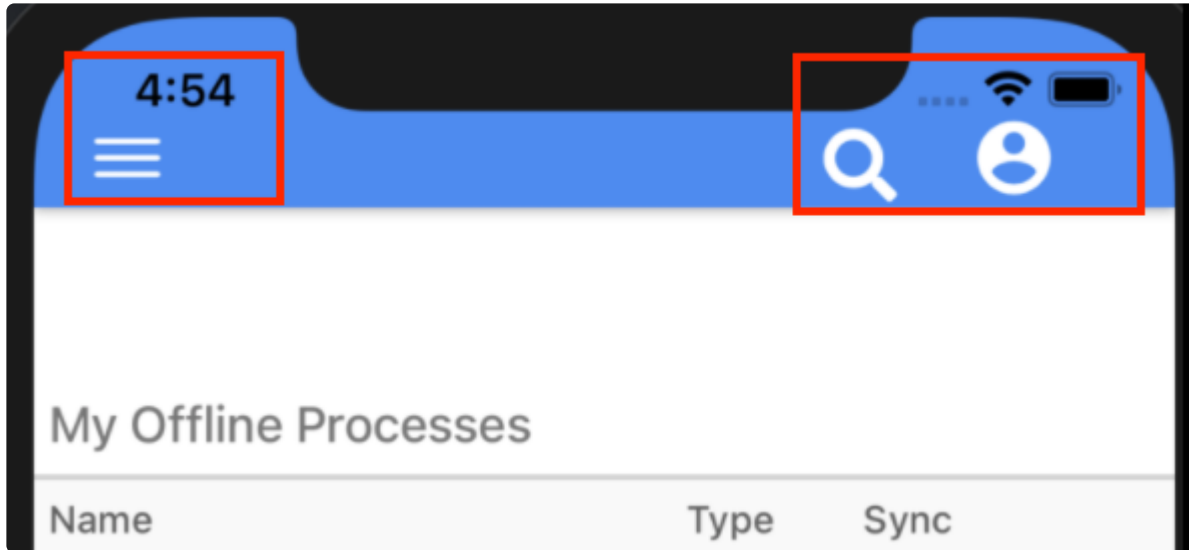






## 6.1.2. Header Icons

Mobile App header icons (profile, search, etc.) are no longer cut off by the user's phone header icons (wifi, battery, etc.) allowing users to see icons clearly and navigate easily.



## 6.1.3. Deleted Processes in WebApp are Automatically Deleted in Mobile App

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Processes deleted in the WebApp are now automatically deleted in the Mobile App regardless of whether users are in online or offline mode. Please note that because of the time objects take to sync to the **offline** app, this process can take up to an hour to complete.

## 6.2. FIXED ISSUES

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### **Publish button & Tools dropdown**

Fixed an issue where the Publish button and the Tools dropdown were missing when viewing on a tablet.

### **Buttons in Graph page**

Fixed an issue where the buttons in the Graph page of a Process or Process Set did not align in online mode.

### **Android fixes**

Fixed an issue where the button to save offline maps did not work for users with Android V11.

Fixed an issue where menu icons were not displayed correctly when users turned their phones horizontally with Android V8.

Fixed an issue where users with Android V8 clicked on the three-dot icons, selected “Community”, returned to the mobile app, clicked the three dot icon again and saw the System Admin settings even if it does not exist in the mobile app.

Fixed an issue where the Audit Trail button did not work for users with Android V8.

### **Header icons**

Fixed an issue where, in online mode, the header icons (three dots, notification, etc) overlapped the homepage when the license error message appeared.

### **Time data in versioning**

Fixed an issue where time data in Versioning and Version History appeared as server time in offline mode.