EPC Release Notes

13.1 — Last update: May 06, 2022

Interfacing Technologies Corporation

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1. Release Notes 13.1

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

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3. WHAT'S NEW IN 13.1

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 –

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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.

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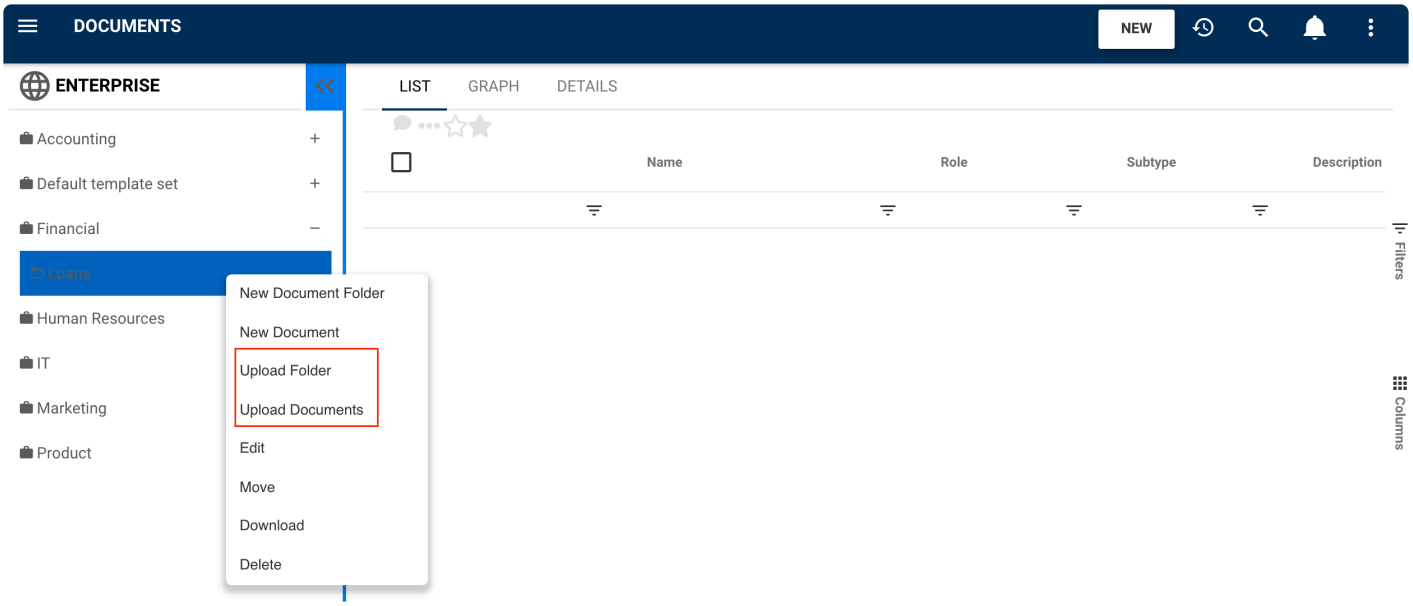
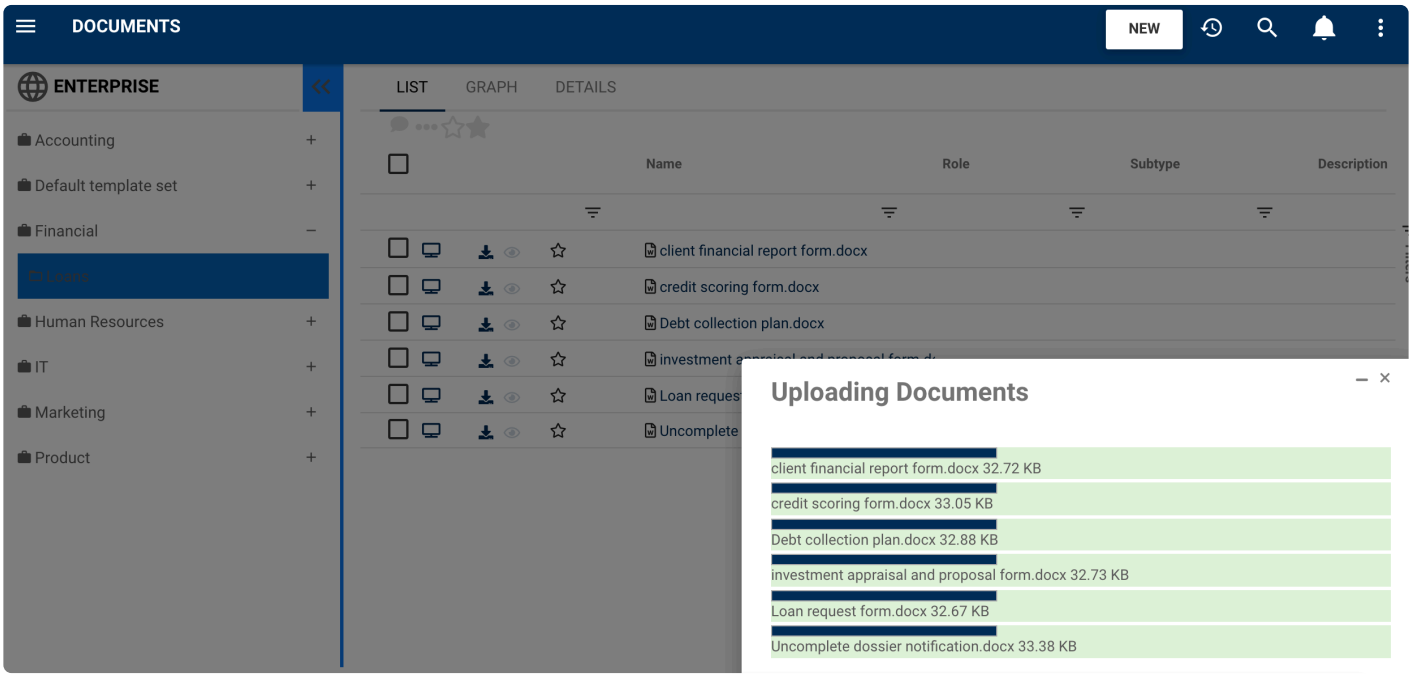
3.1. Document Management Enhancements

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.

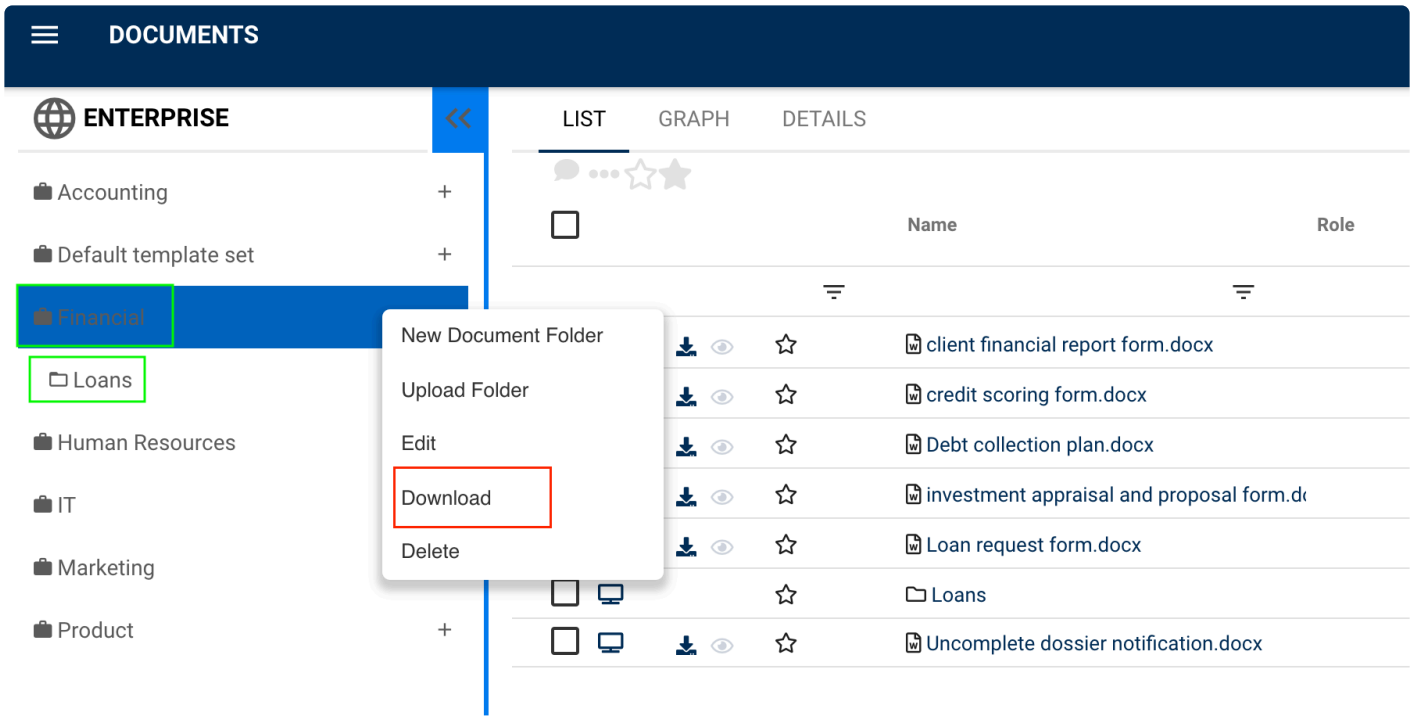


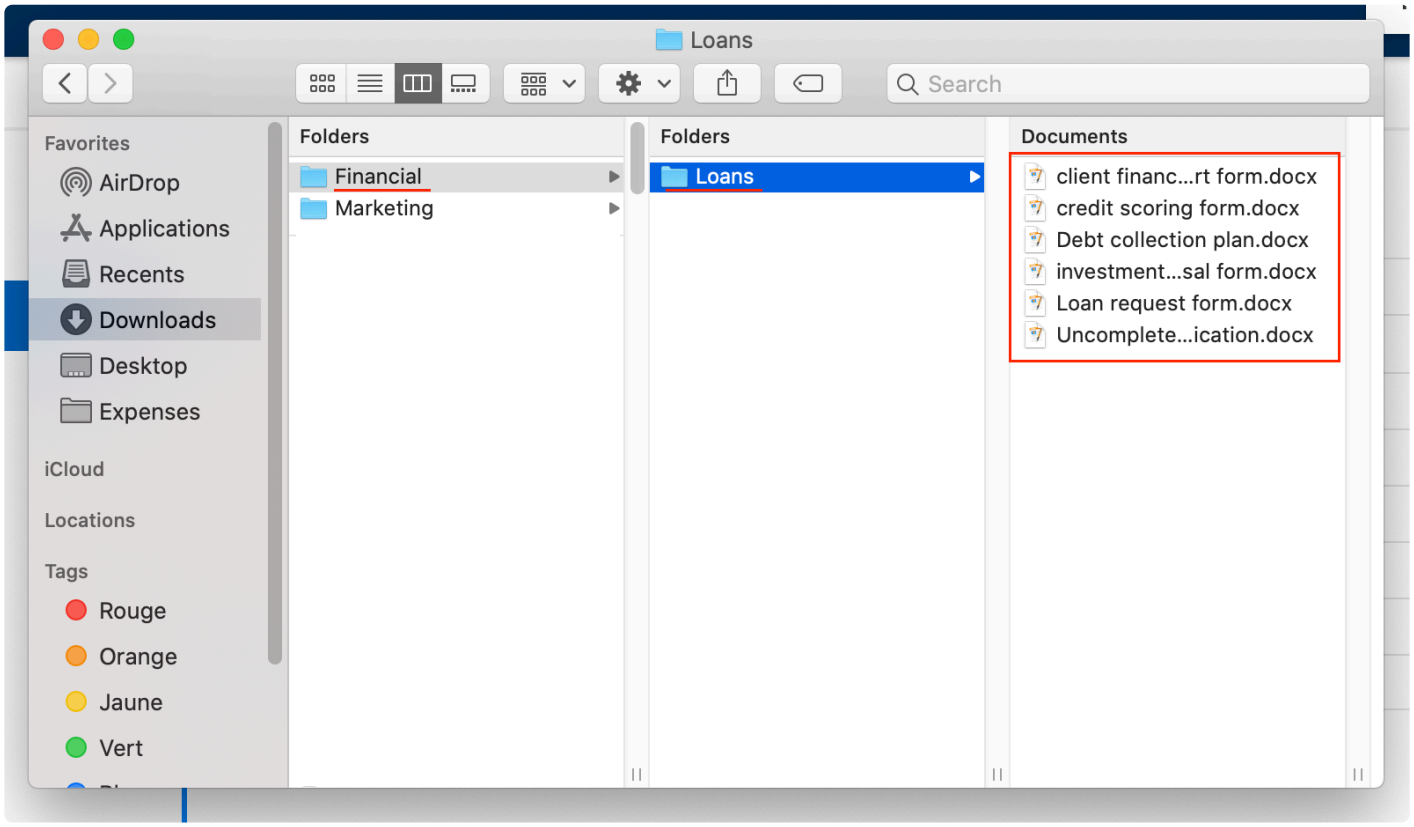


Mass Document Download as a Zip Folder with Structure

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

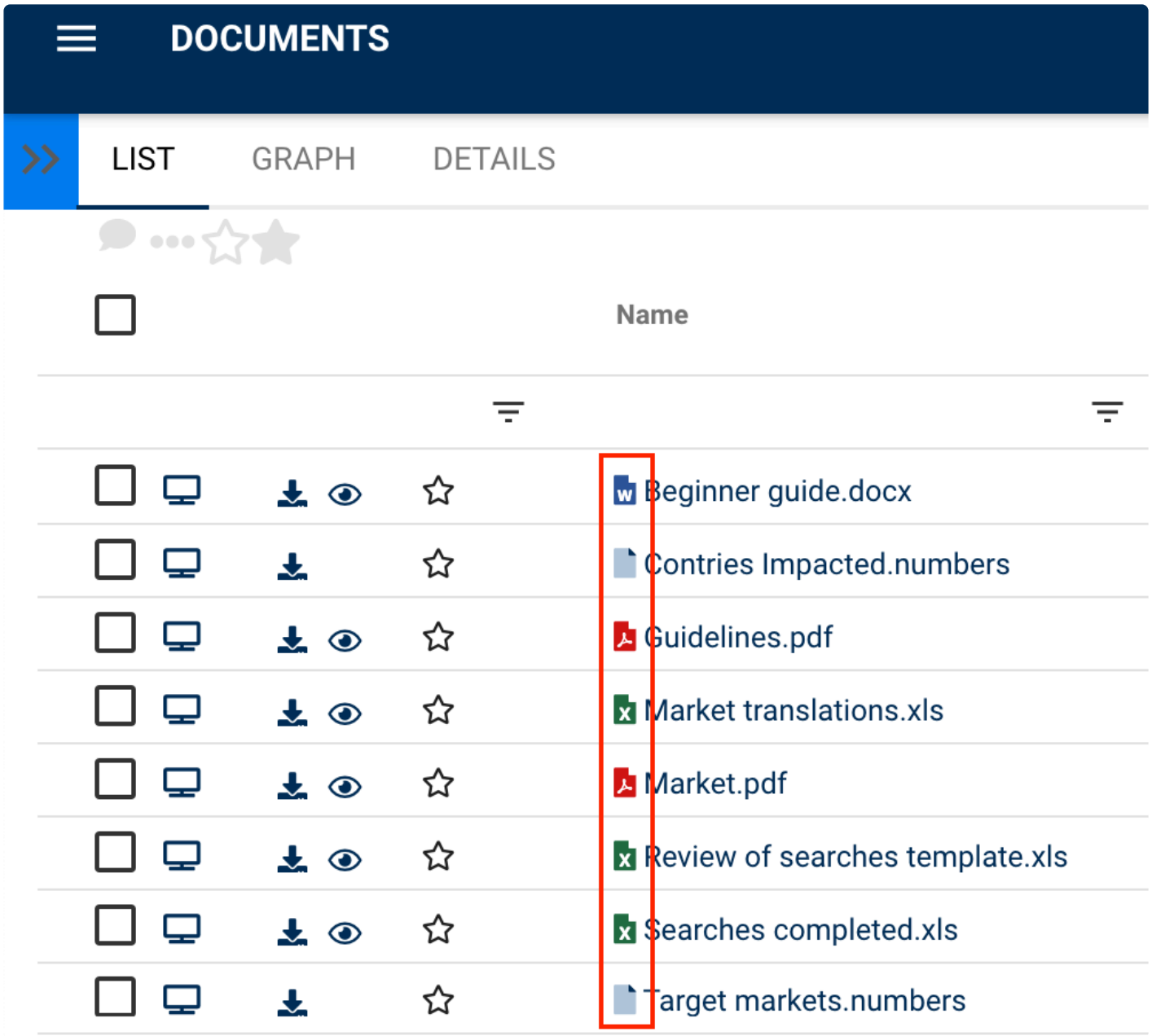
made more efficient, as they will be downloaded as ZIP files. The folder structure will be preserved, to keep records regarding specific projects intact and downloaded all in one. This new feature is accessible through the Documents module hierarchy tree by right clicking on any document set or folder.





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.



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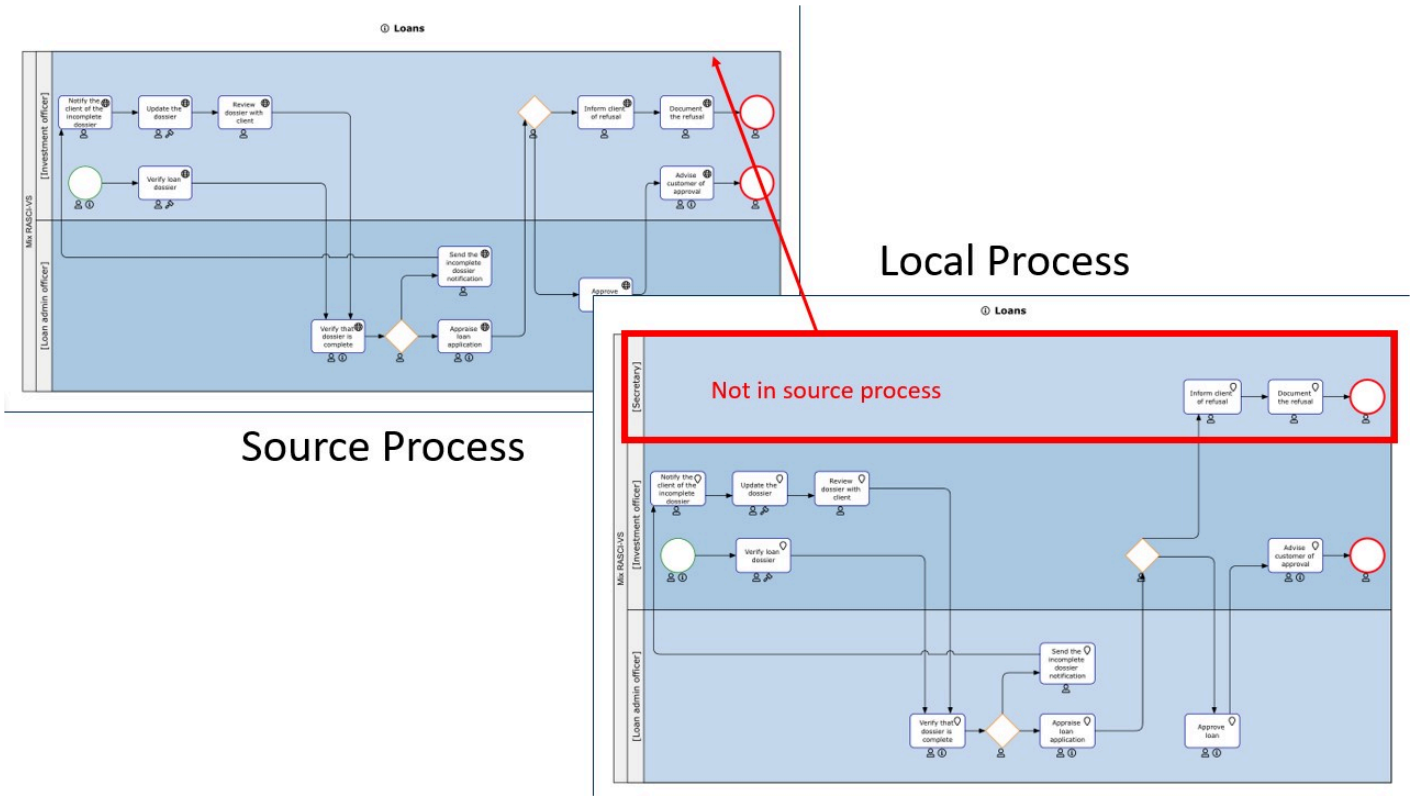
3.2. Synchronization of Changes from Global to Local

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.

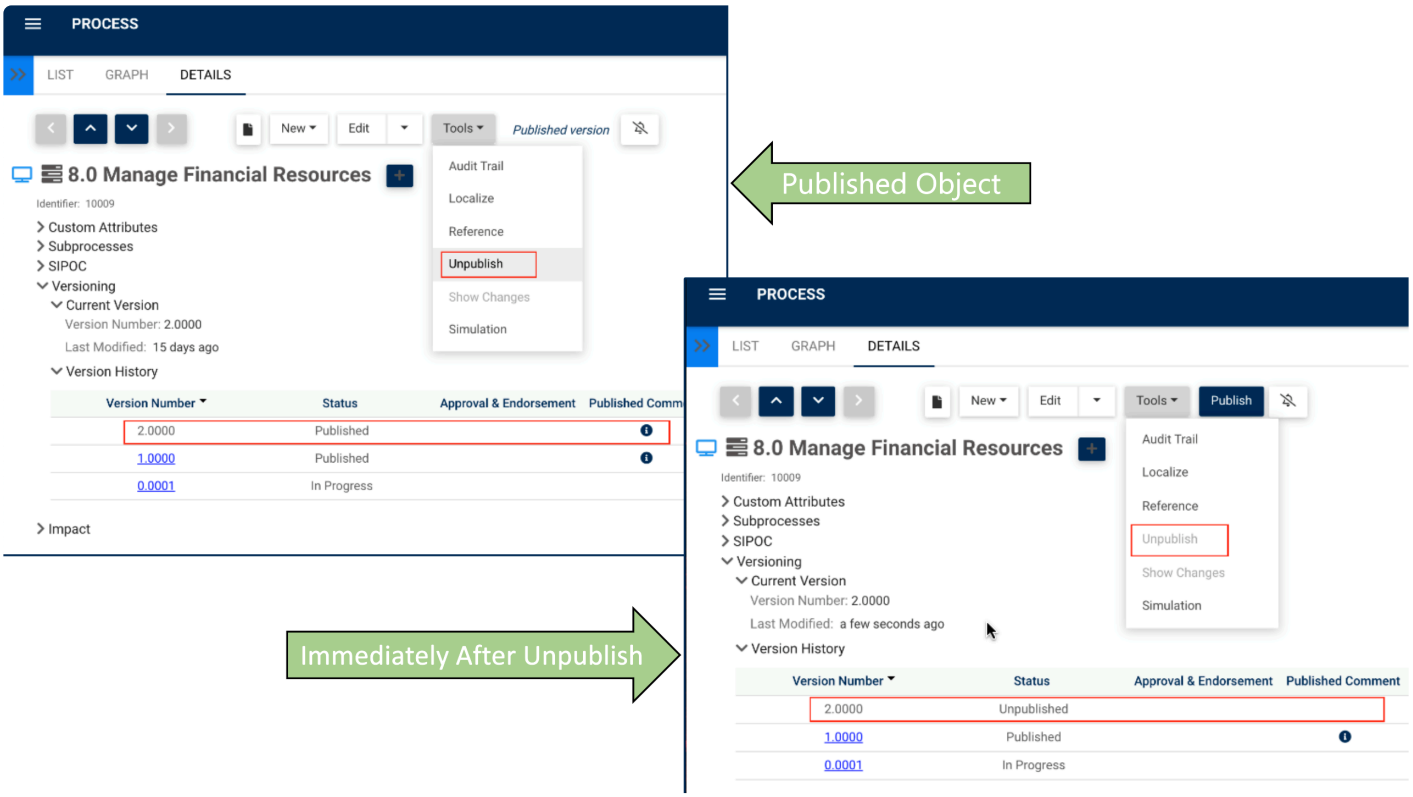
This new functionality will allow you to:

- 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.



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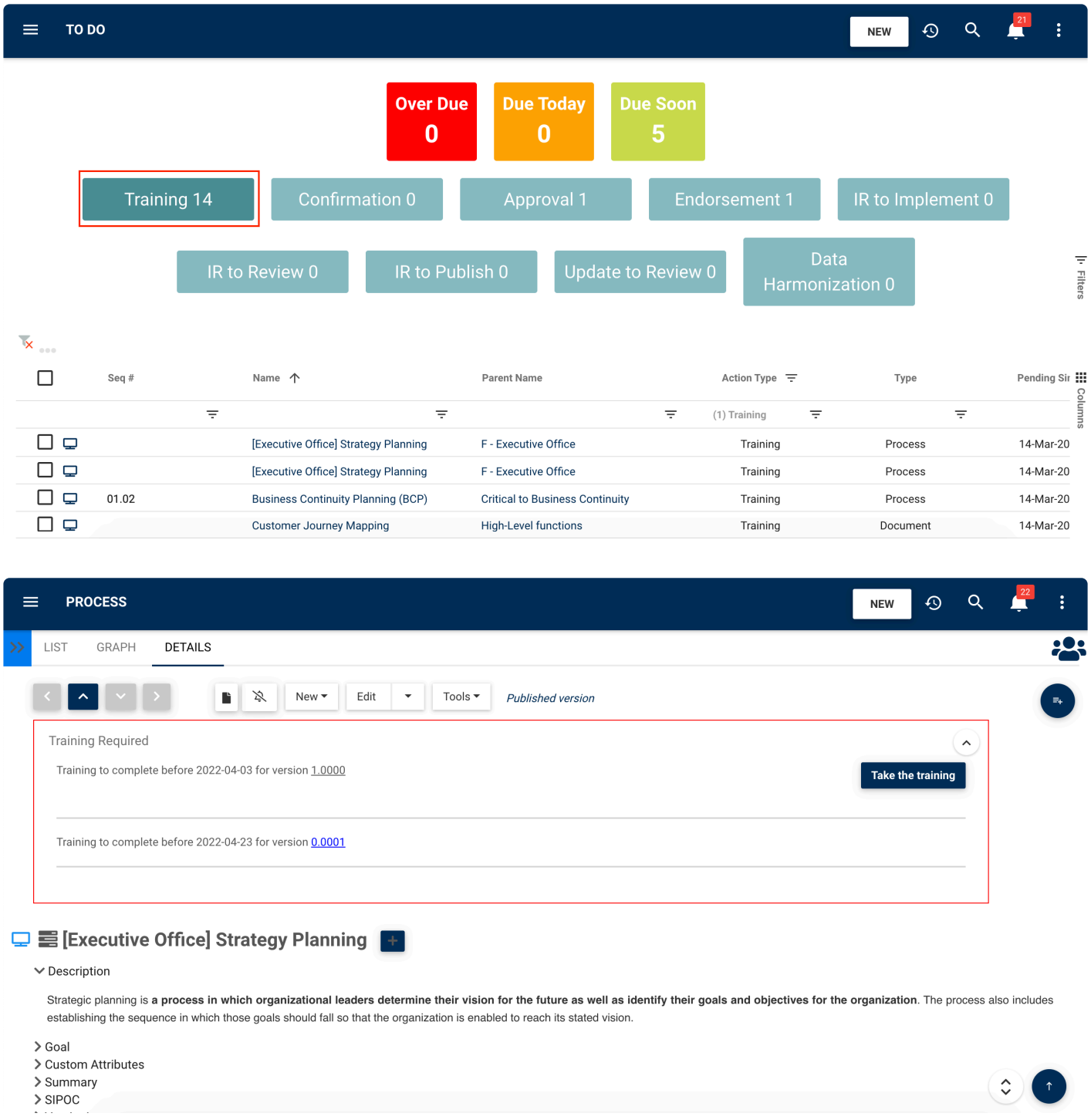
3.4. Integration To Trigger Training Requests Directly in Interfacing Training App

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.



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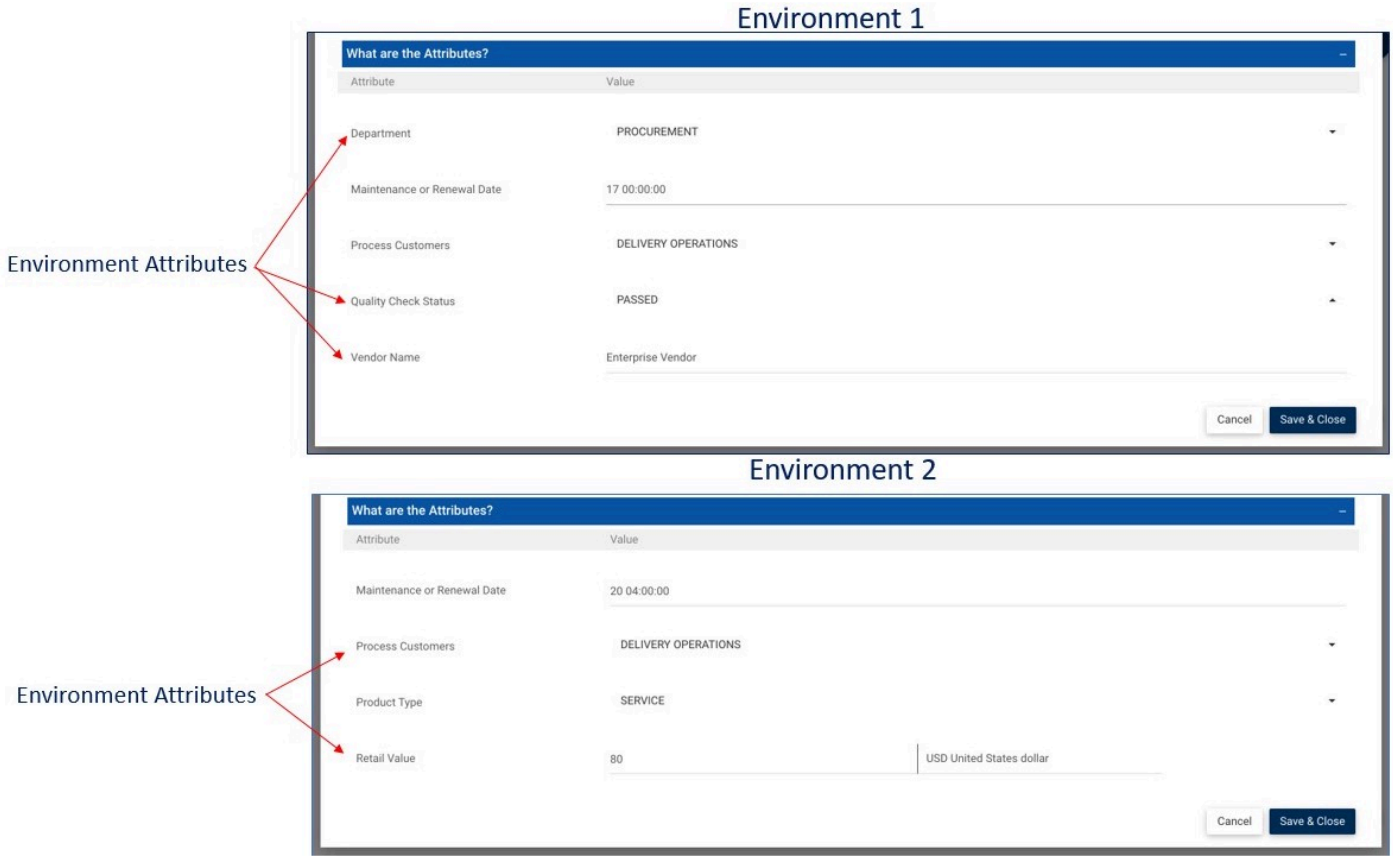
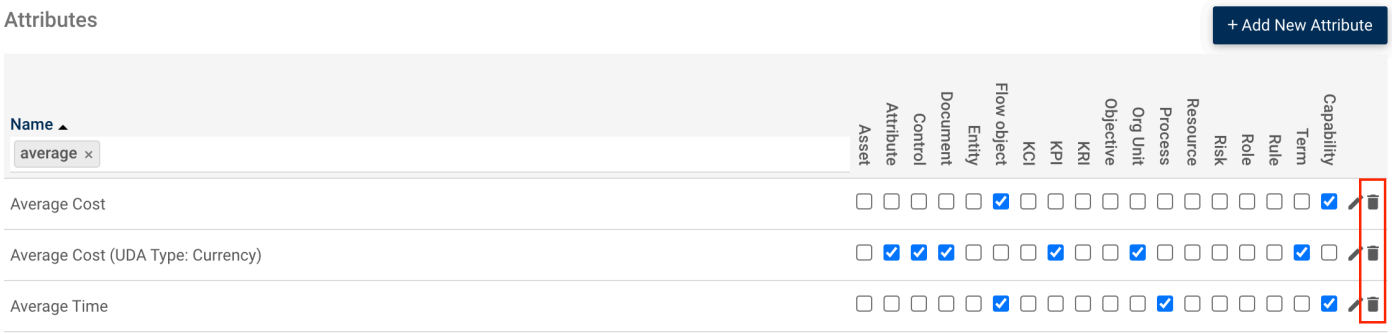
3.5. Custom User Defined Attributes (UDAs) Per Environment

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.



3.6. Option to Delete Default System Attributes

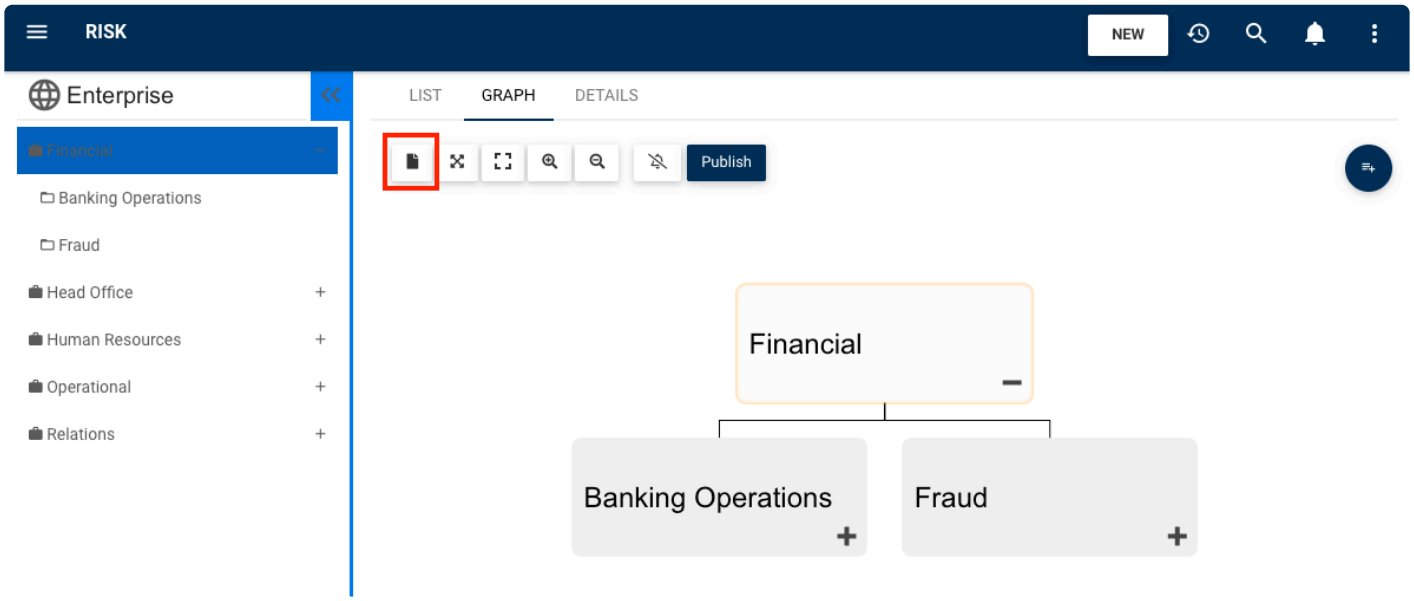
Users has now the possibility to delete the three of EPC's default system attributes (Active Time, Average Cost and Average Time).



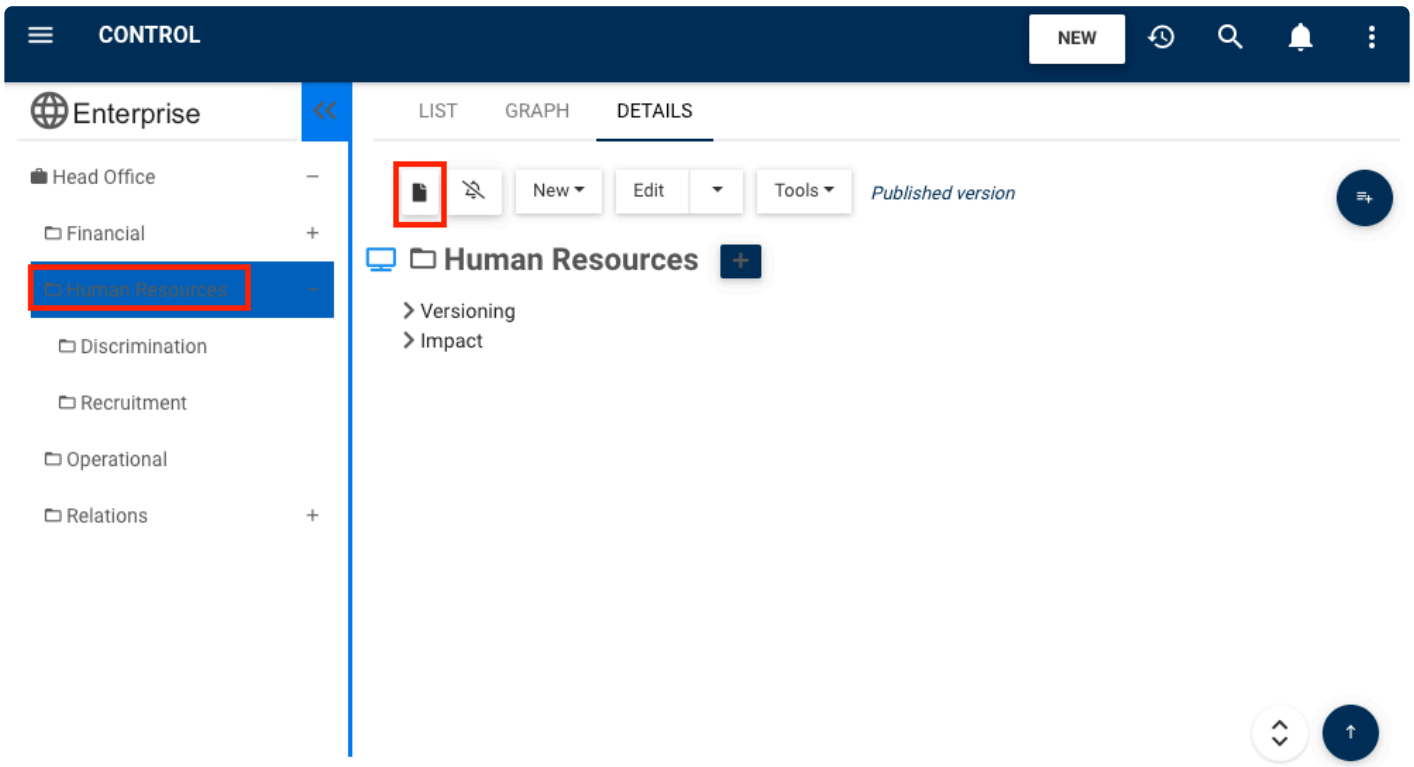
3.7. Ability to Generate Books For All Objects

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:



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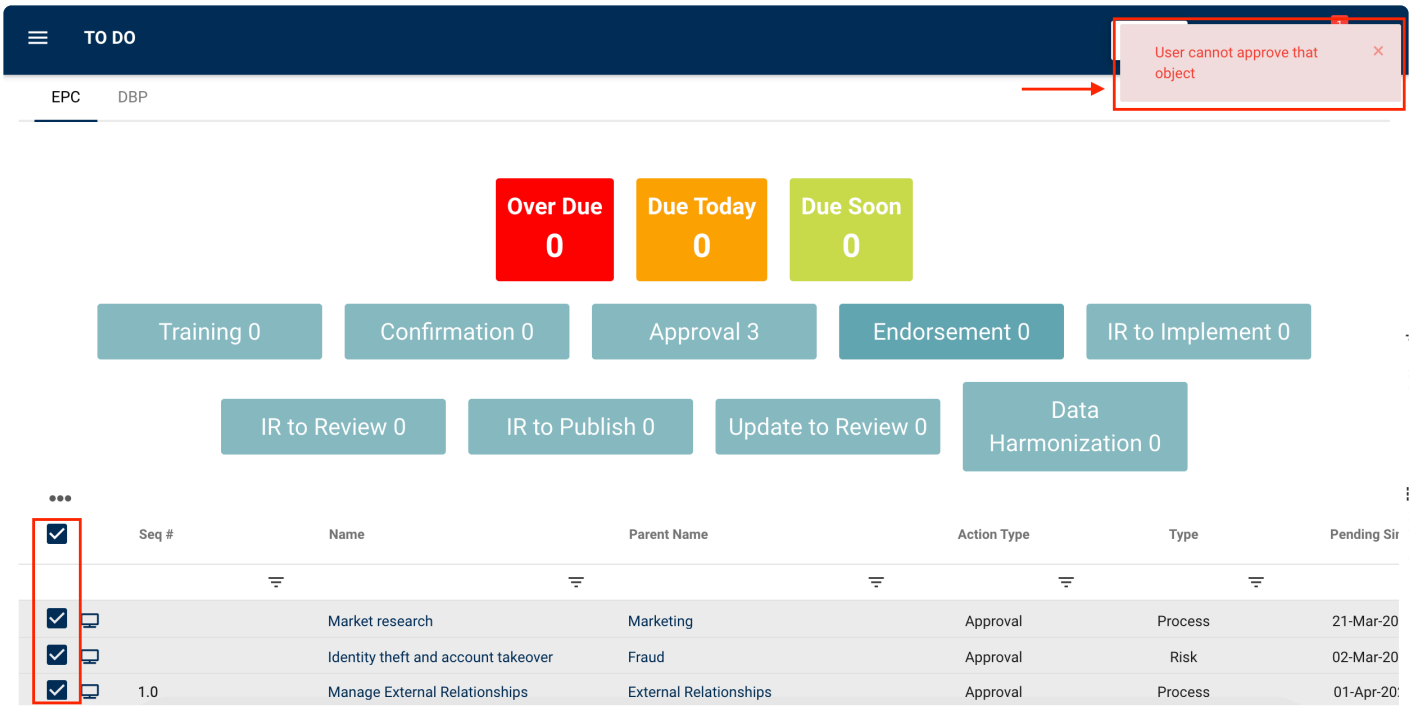
3.8. Option to De-activate Mass actions (Approvals, Endorsements & Confirmations)

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



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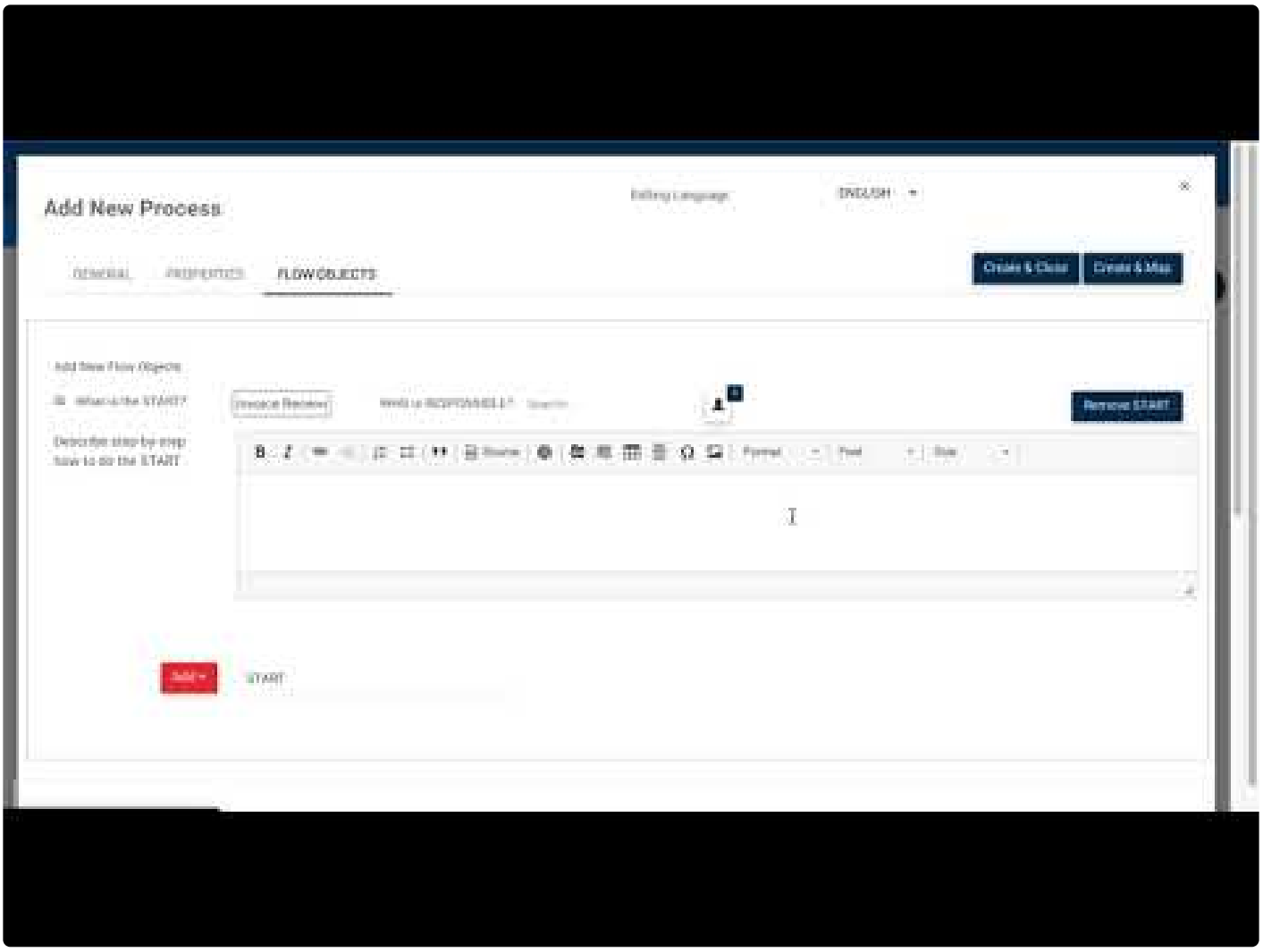
3.9. Swimlanes Map Added to Quickly Create a New Process

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

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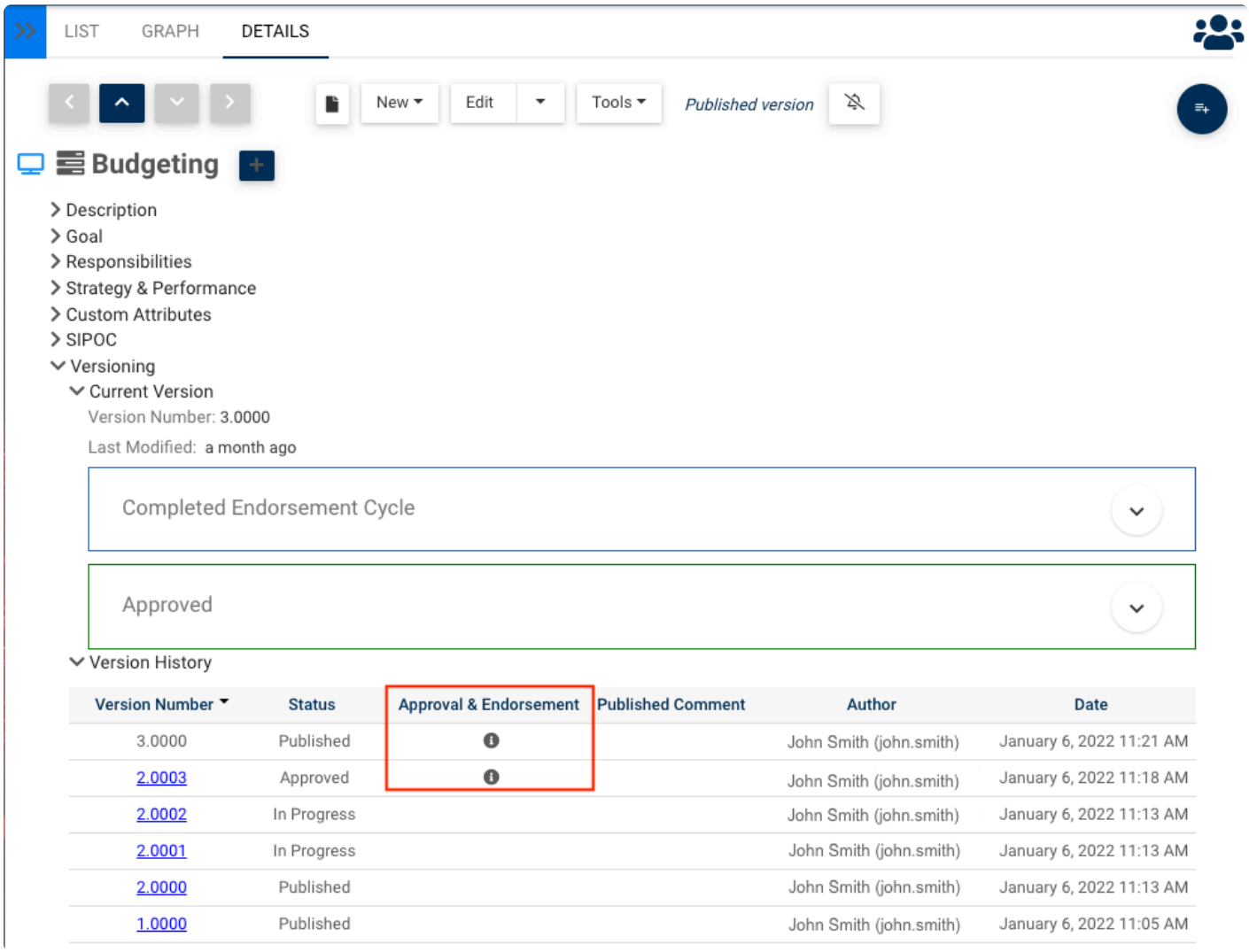
3.10. Approval & Endorsement Cycle History Per Version

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.



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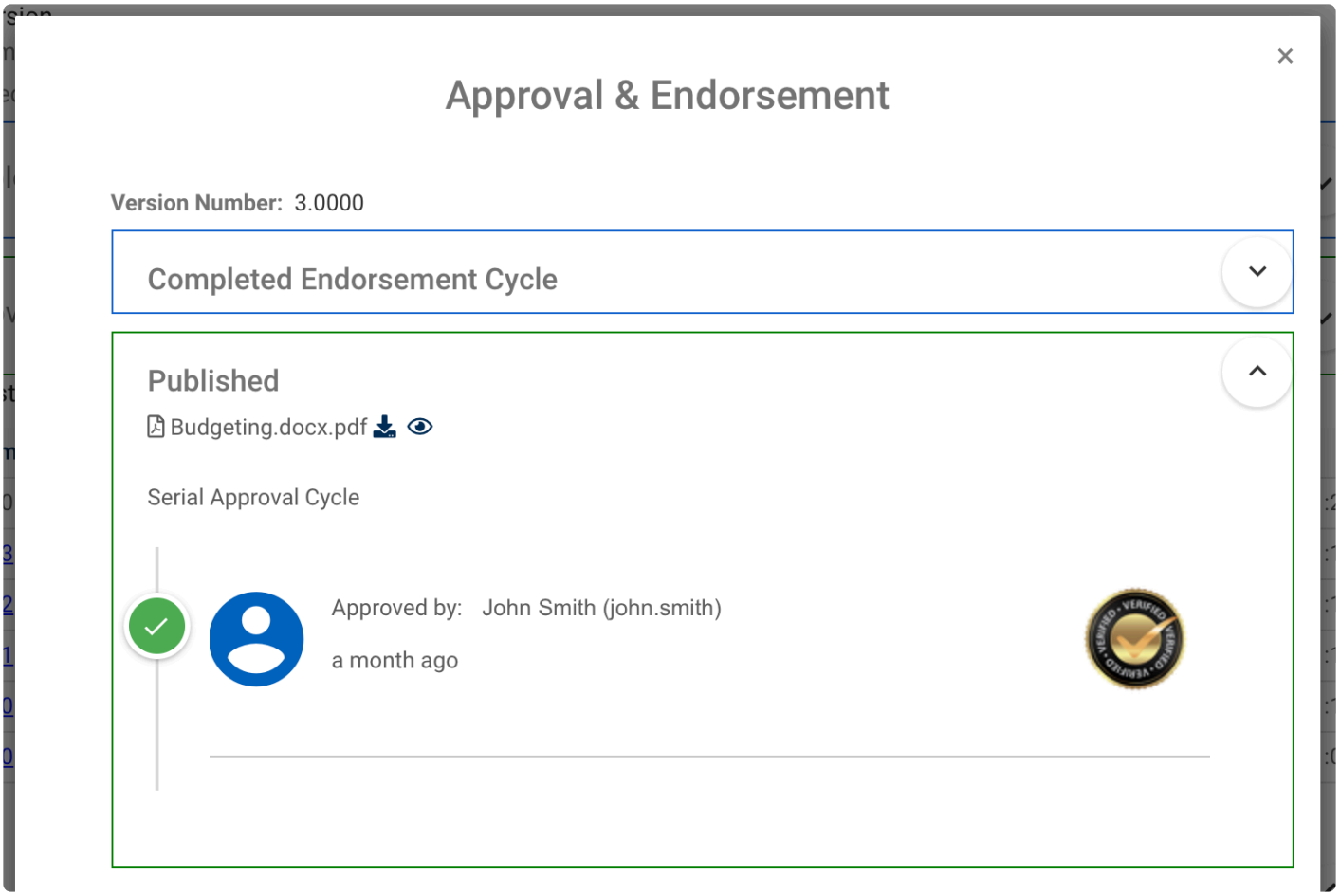
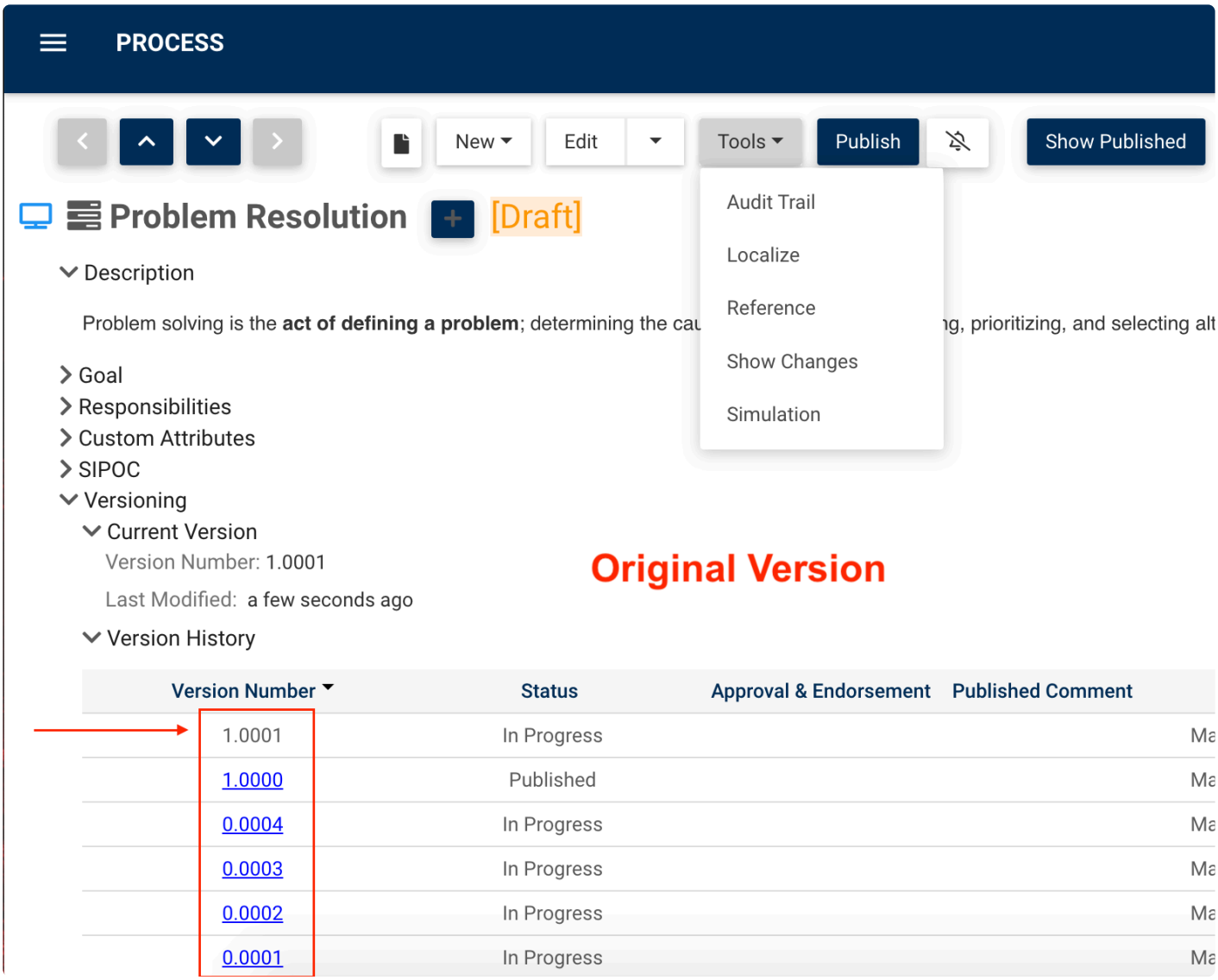

Approval & Endorsement
Version Number: 3.0000
Completed Endorsement Cycle
Published
Budgeting.docx.pdf
Serial Approval Cycle
Approved by: John Smith (john.smith)
a month ago

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.



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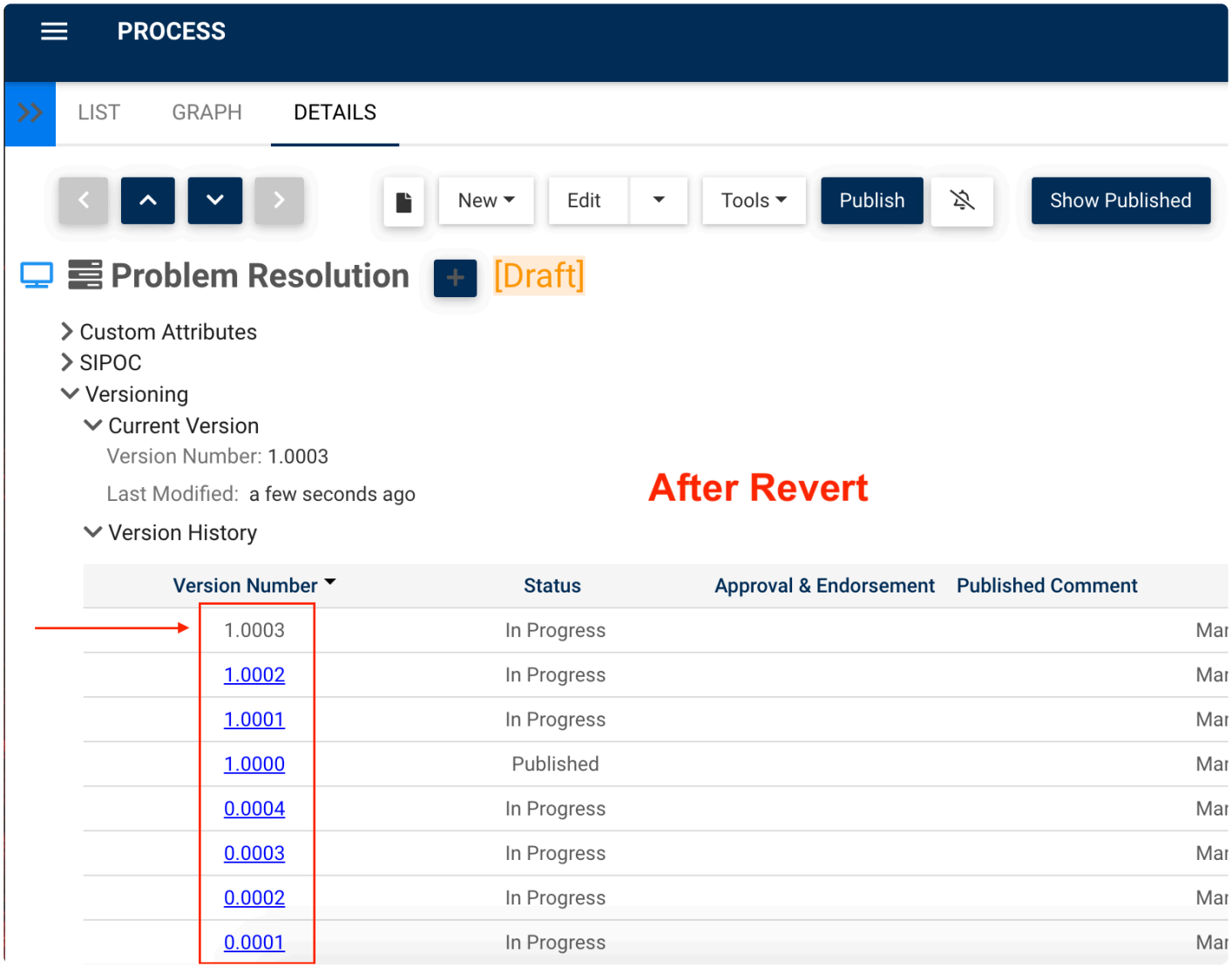

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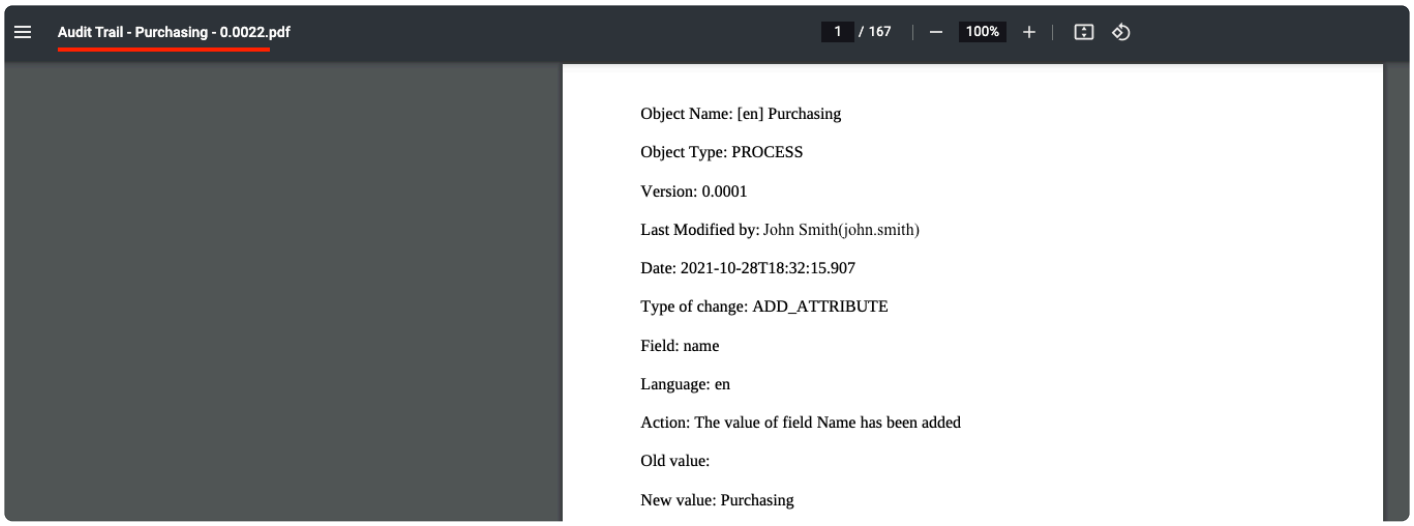
3.12. Additional Audit Trail Document in PDF Format

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.



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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.

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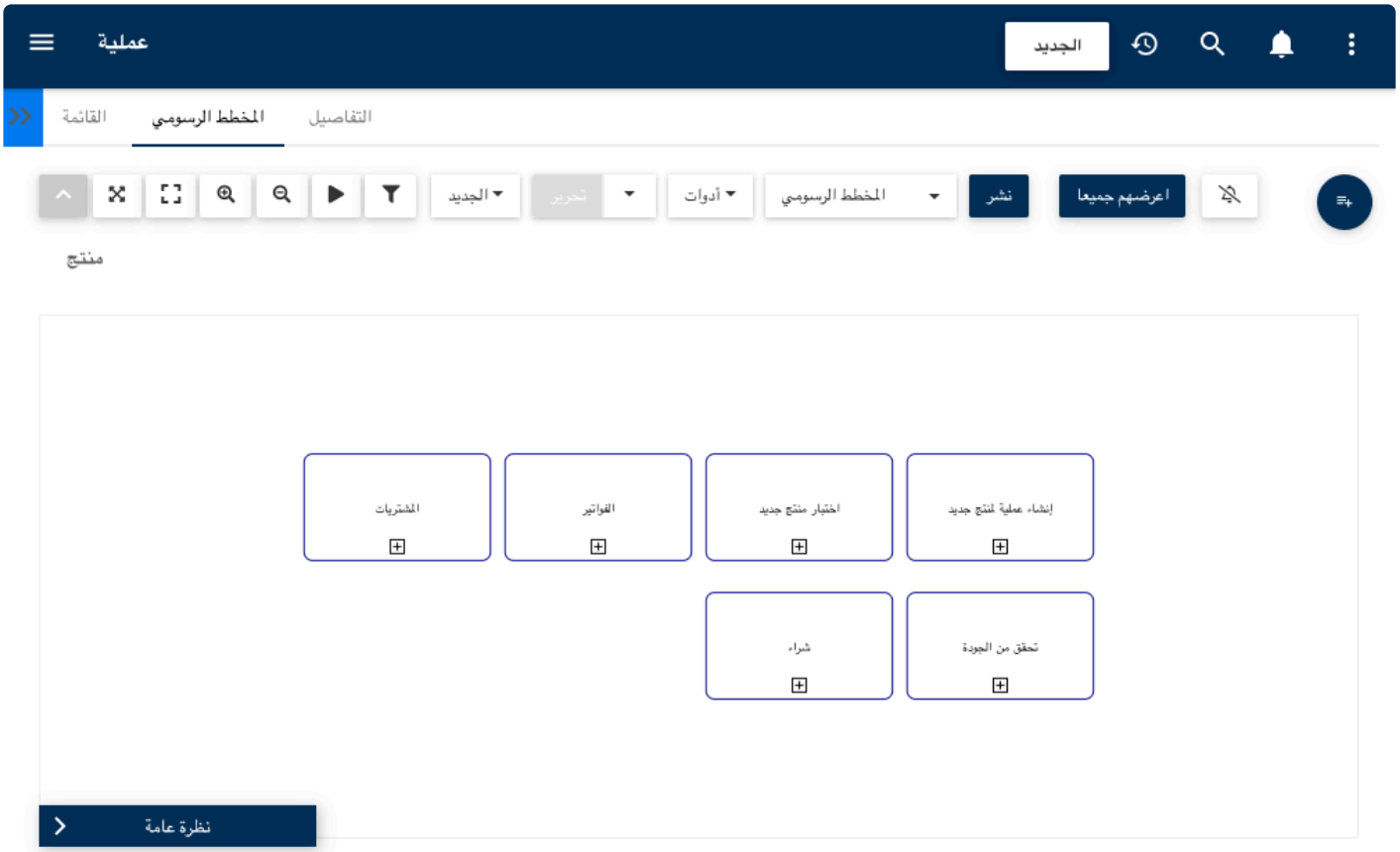

Ability to Position Assets & Artifacts Independent of RASCI-VS in Swimlanes Map

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.

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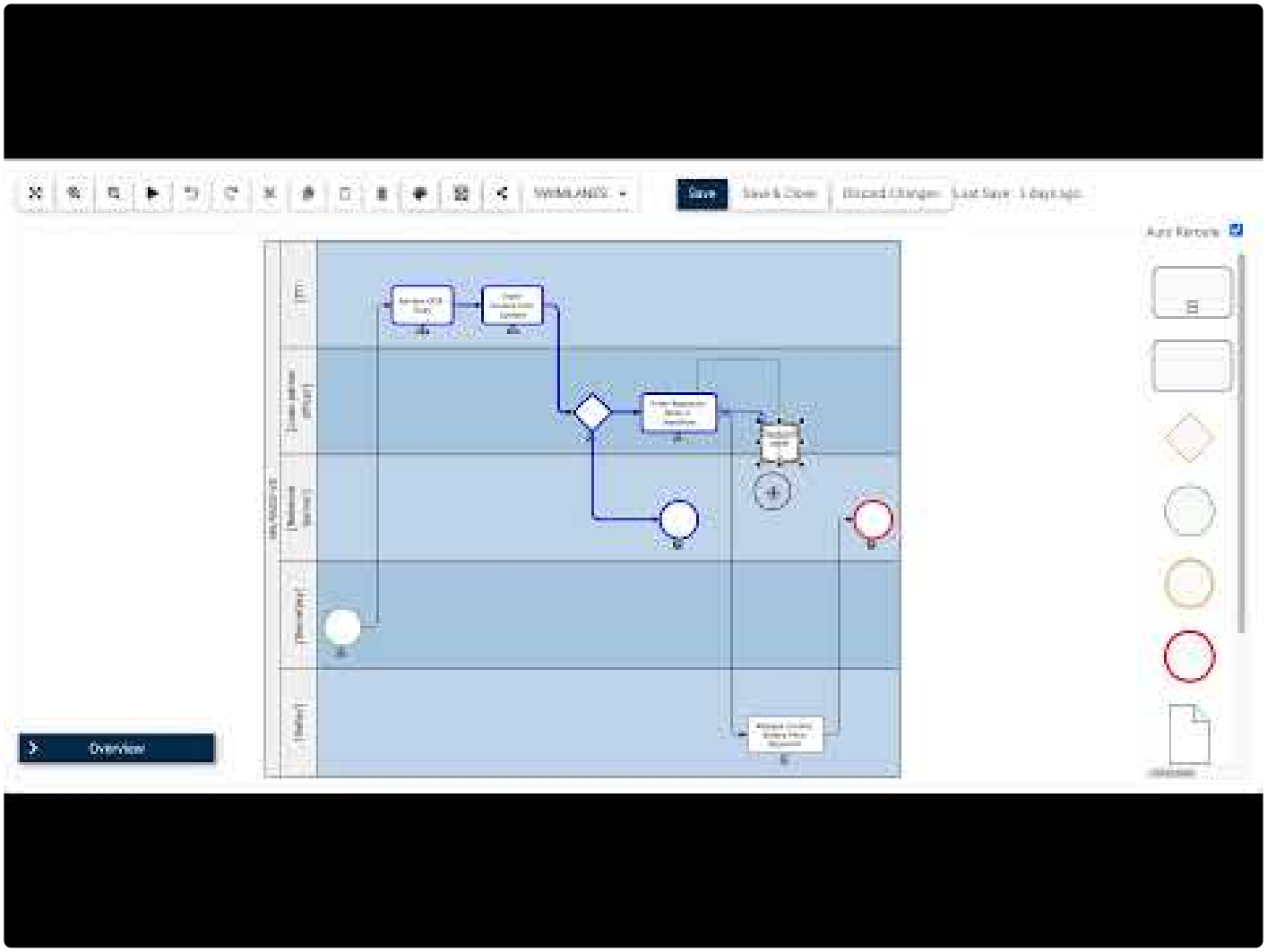

https://www.youtube.com/embed/97l1ev9thEw?rel=0&autoplay=1

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.

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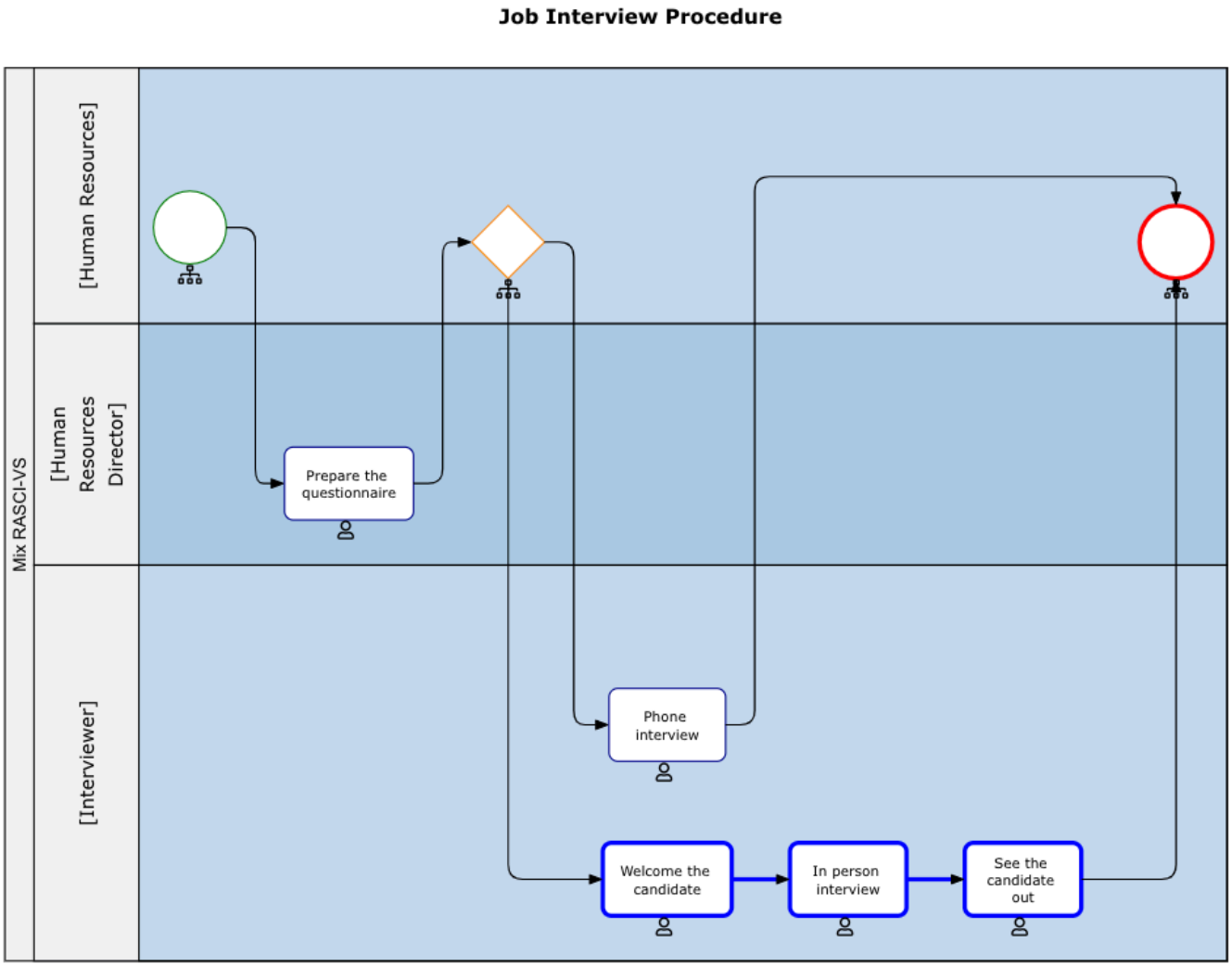

Automatically Save Auto Reroute Button Value

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.

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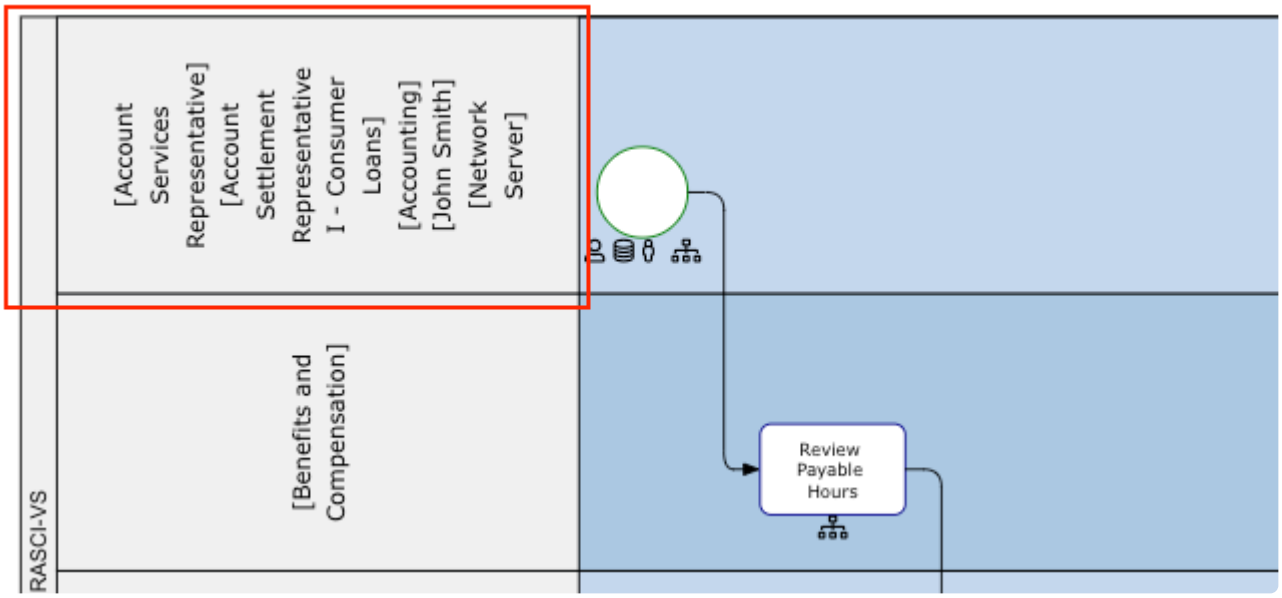

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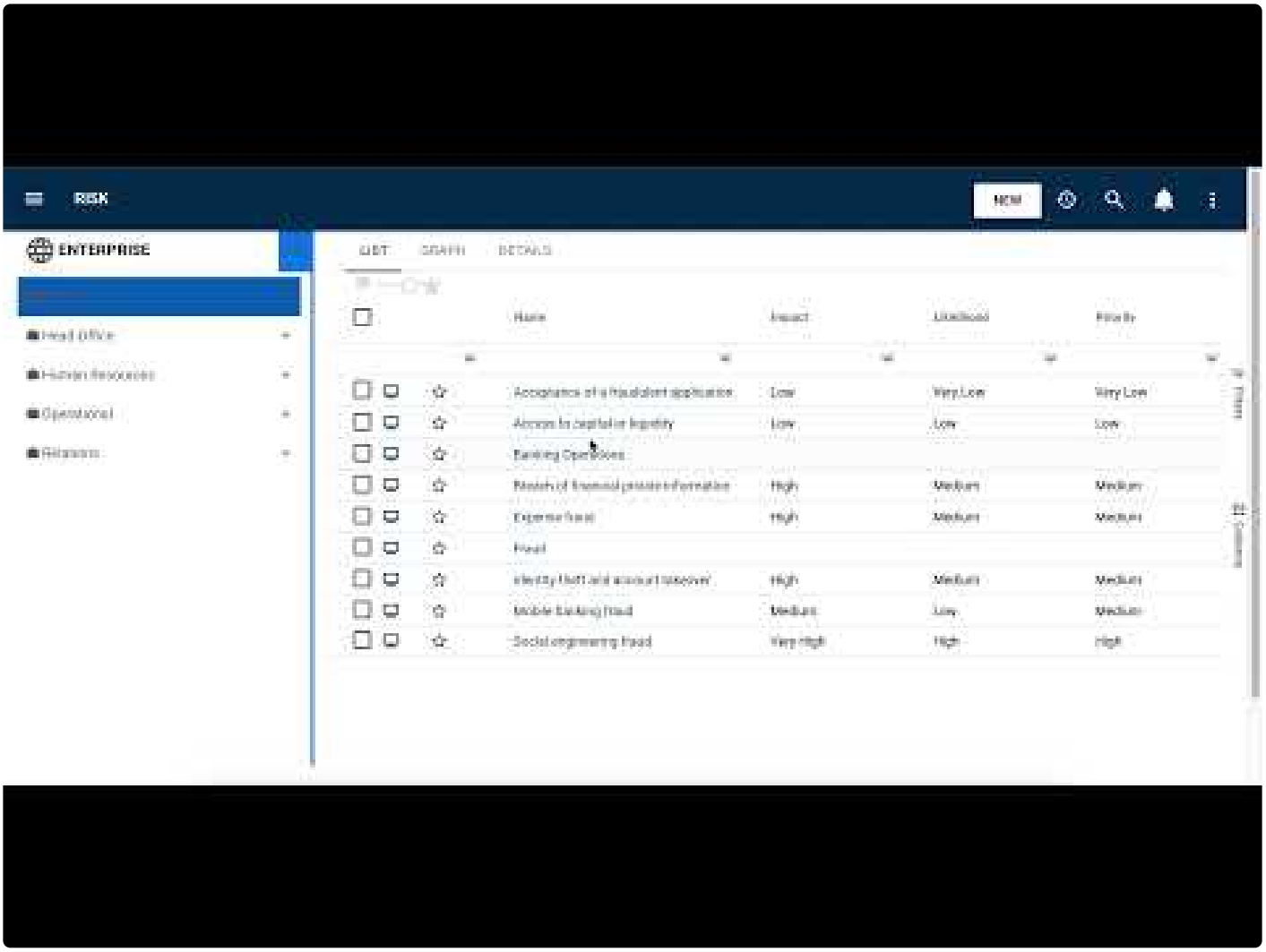
3.14. UI Enhancements

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.

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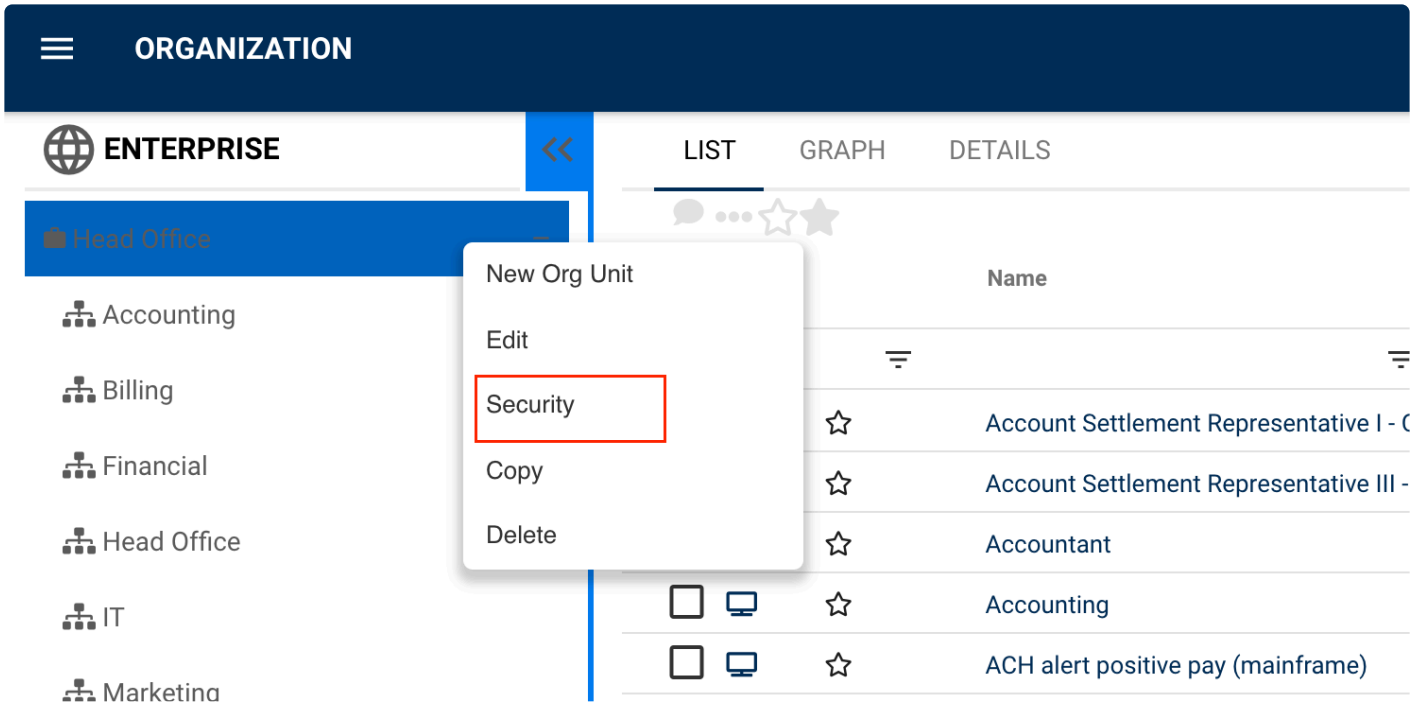
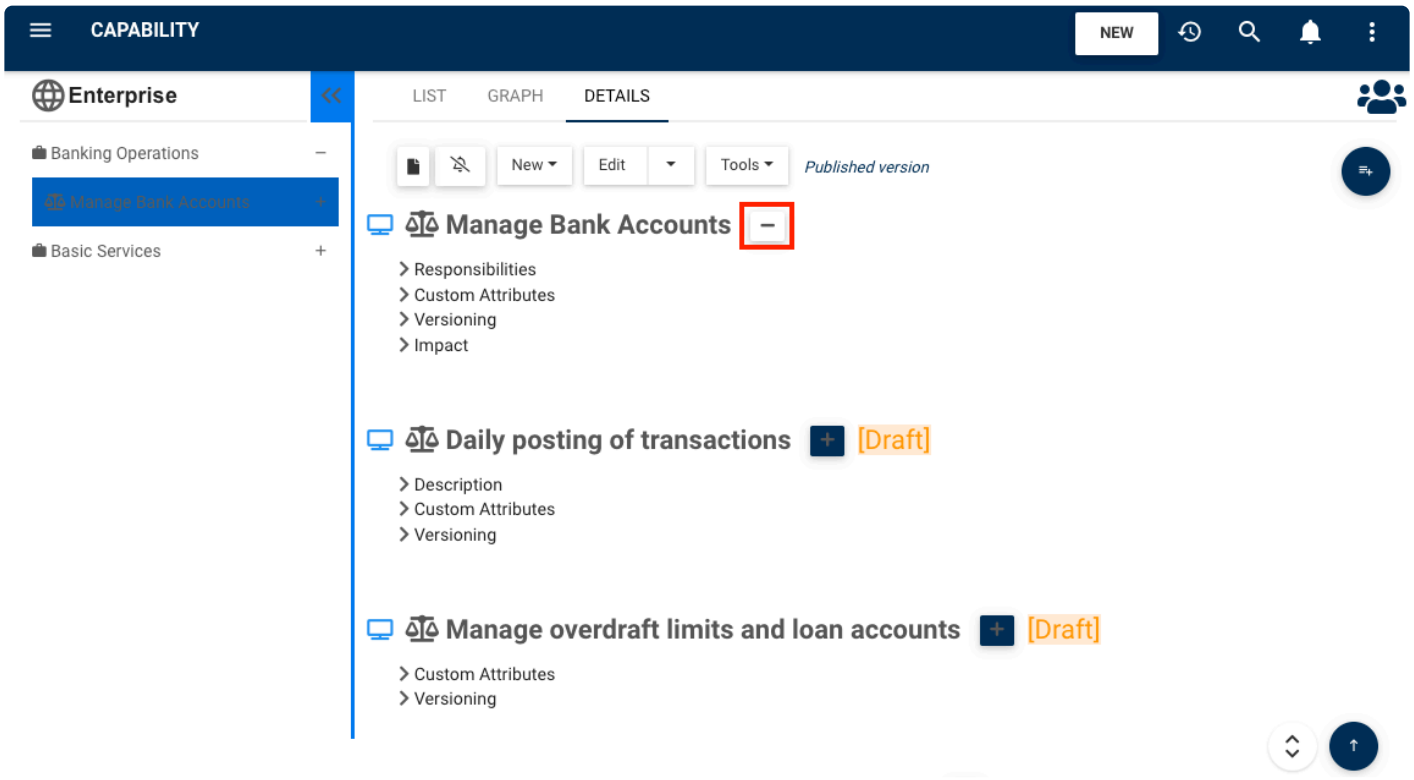


Object Details Expand (+) Added to All Modules

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).



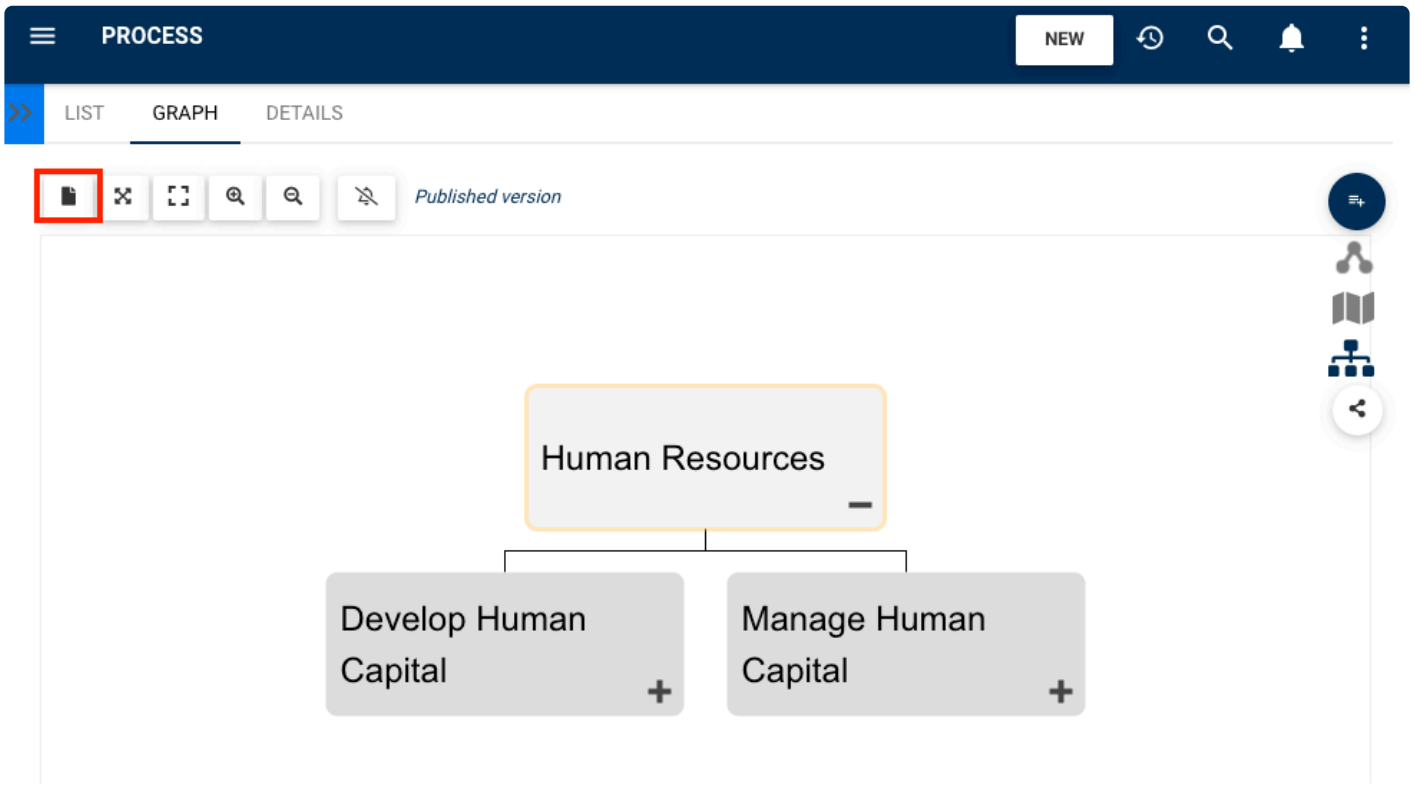
Clearer Error Messages on Save

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:



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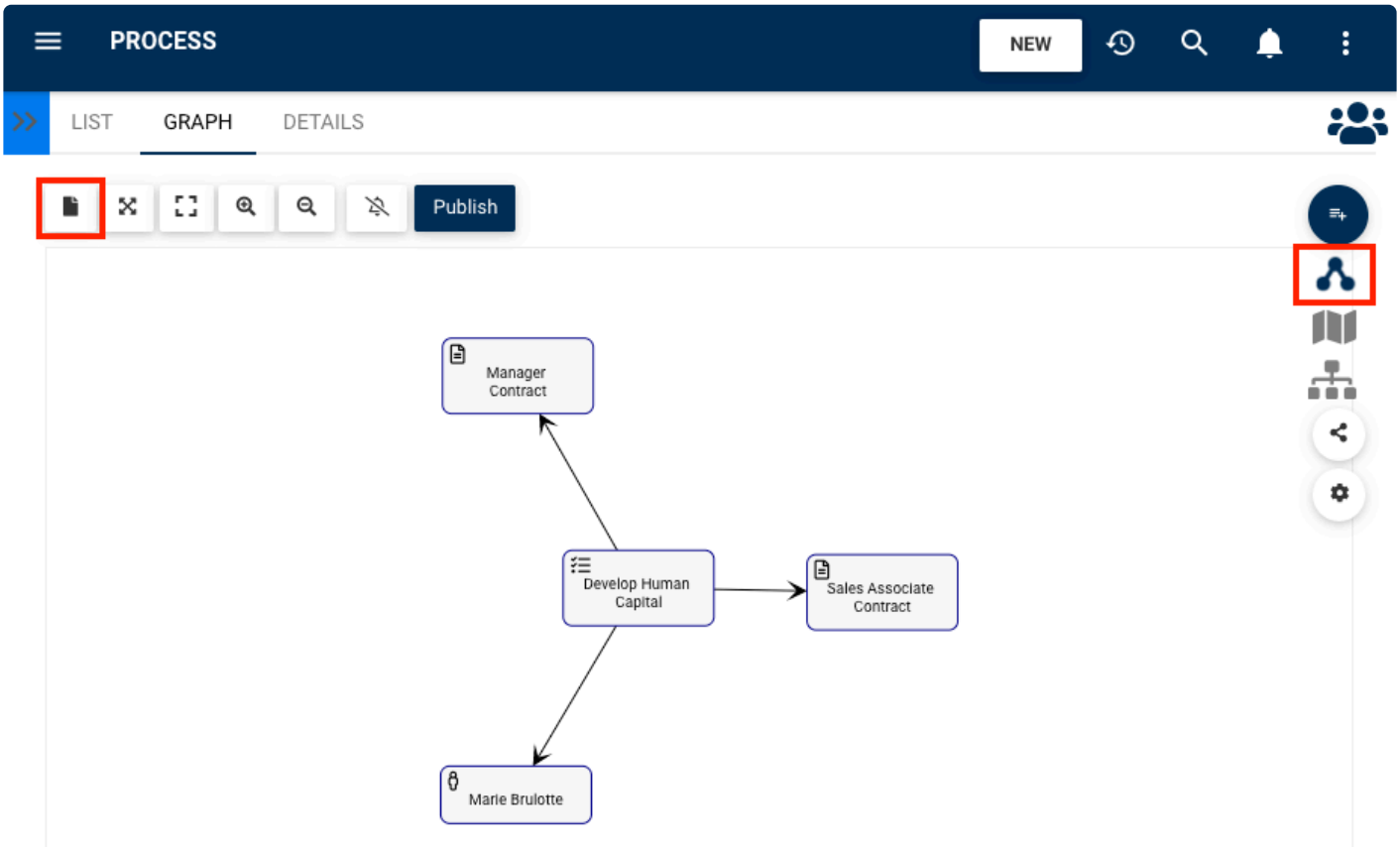
Impact Graph:



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.

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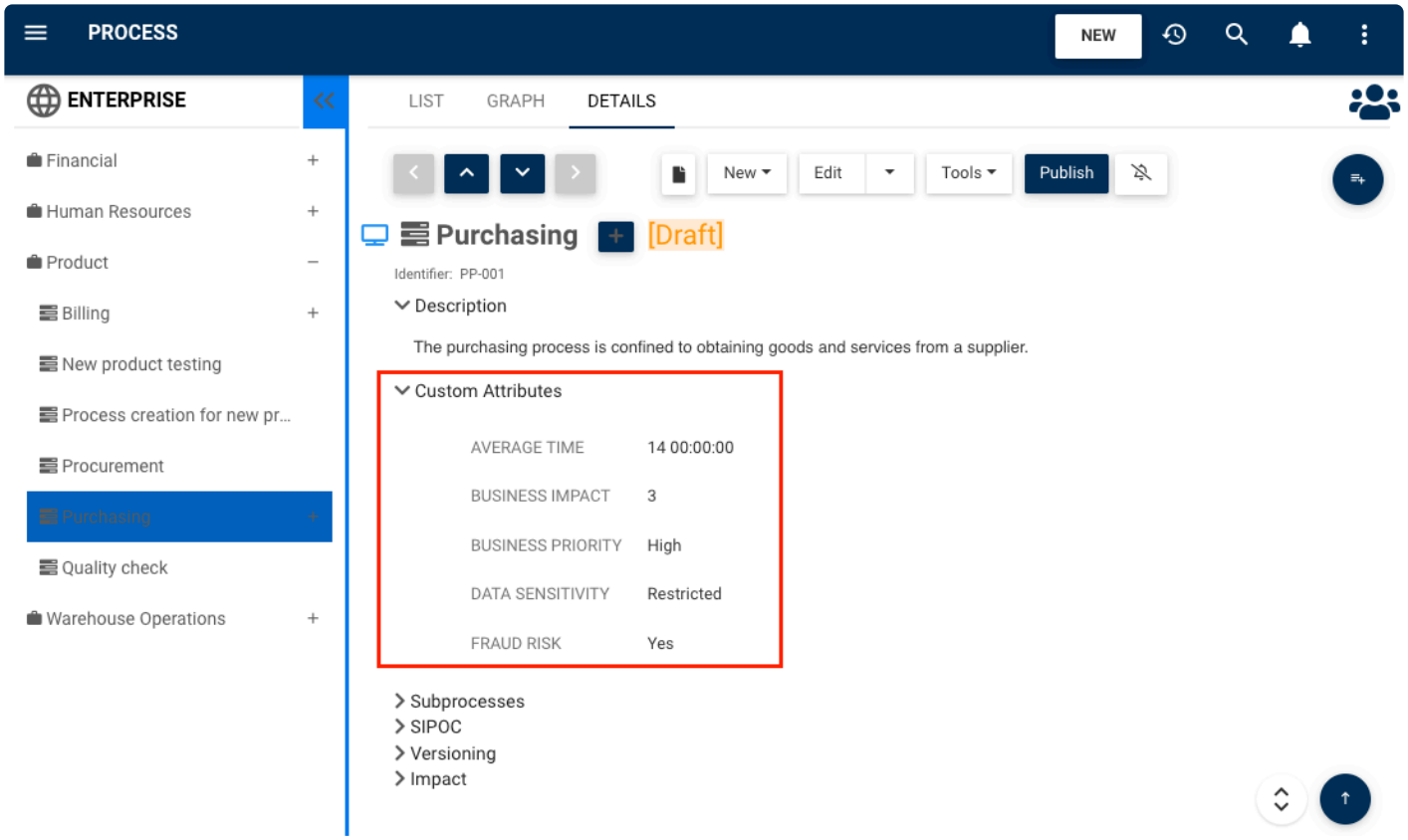

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3.15. CKEditor Security Update

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

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4. FIXED ISSUES

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.

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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.

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5. PROCESS-MINING PARSER

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

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5.1. WHAT'S NEW IN PARSER

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.

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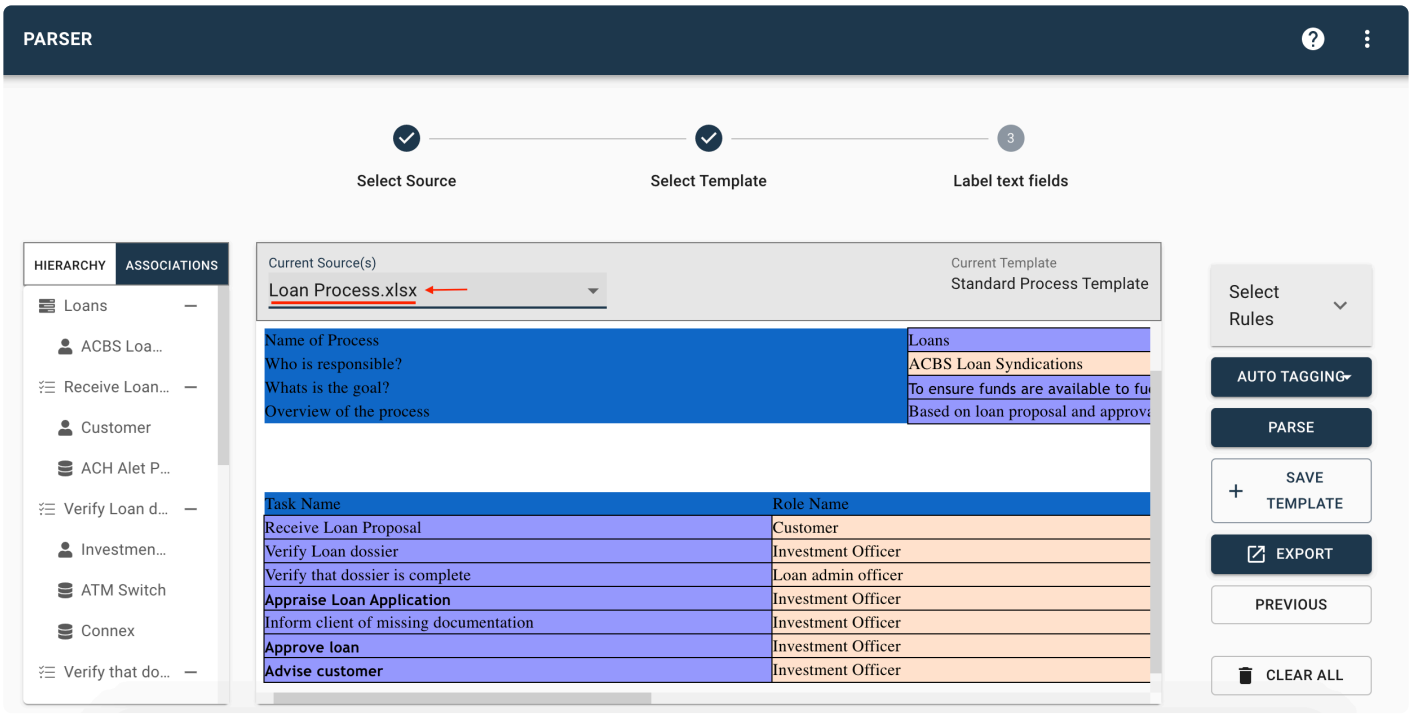
5.1.1. Process-Mining Parser Extended to support MS Excel files

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



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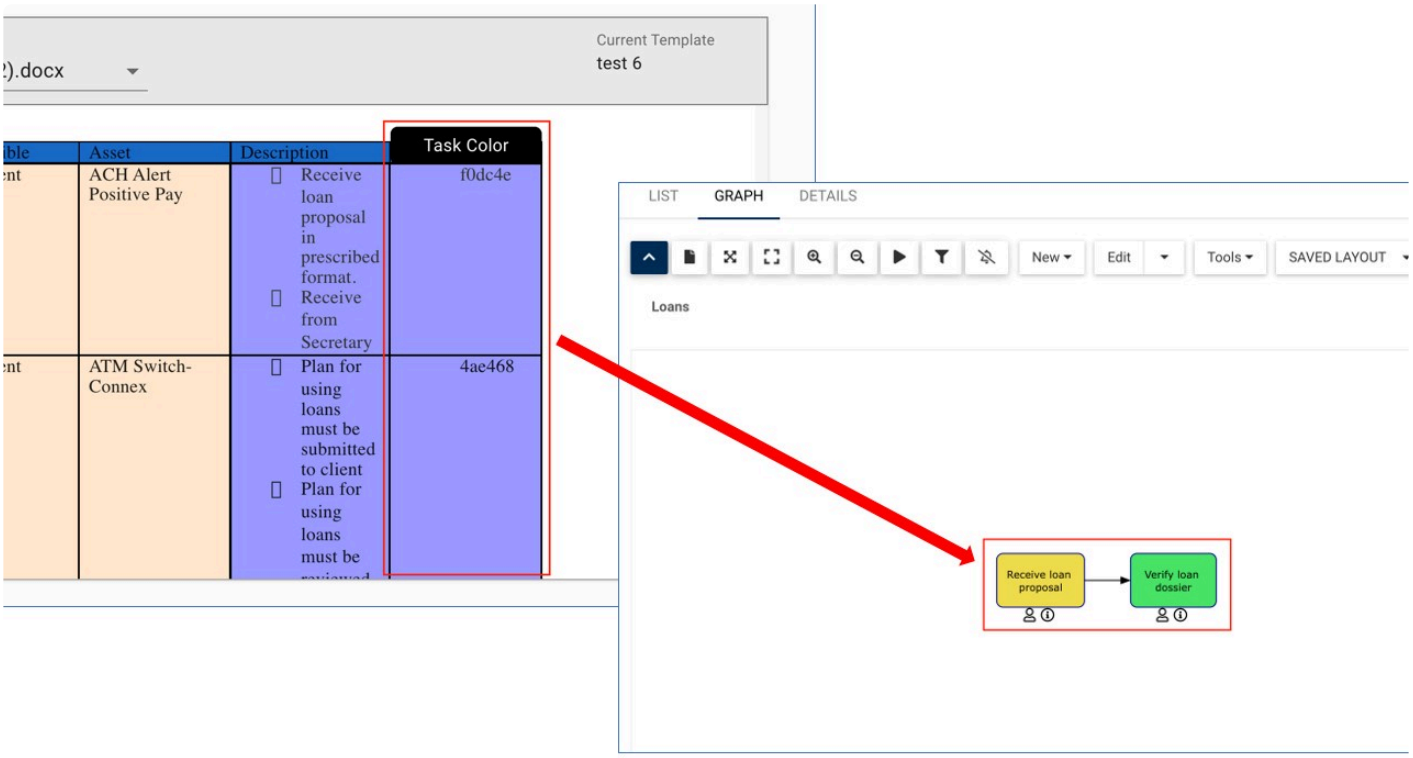
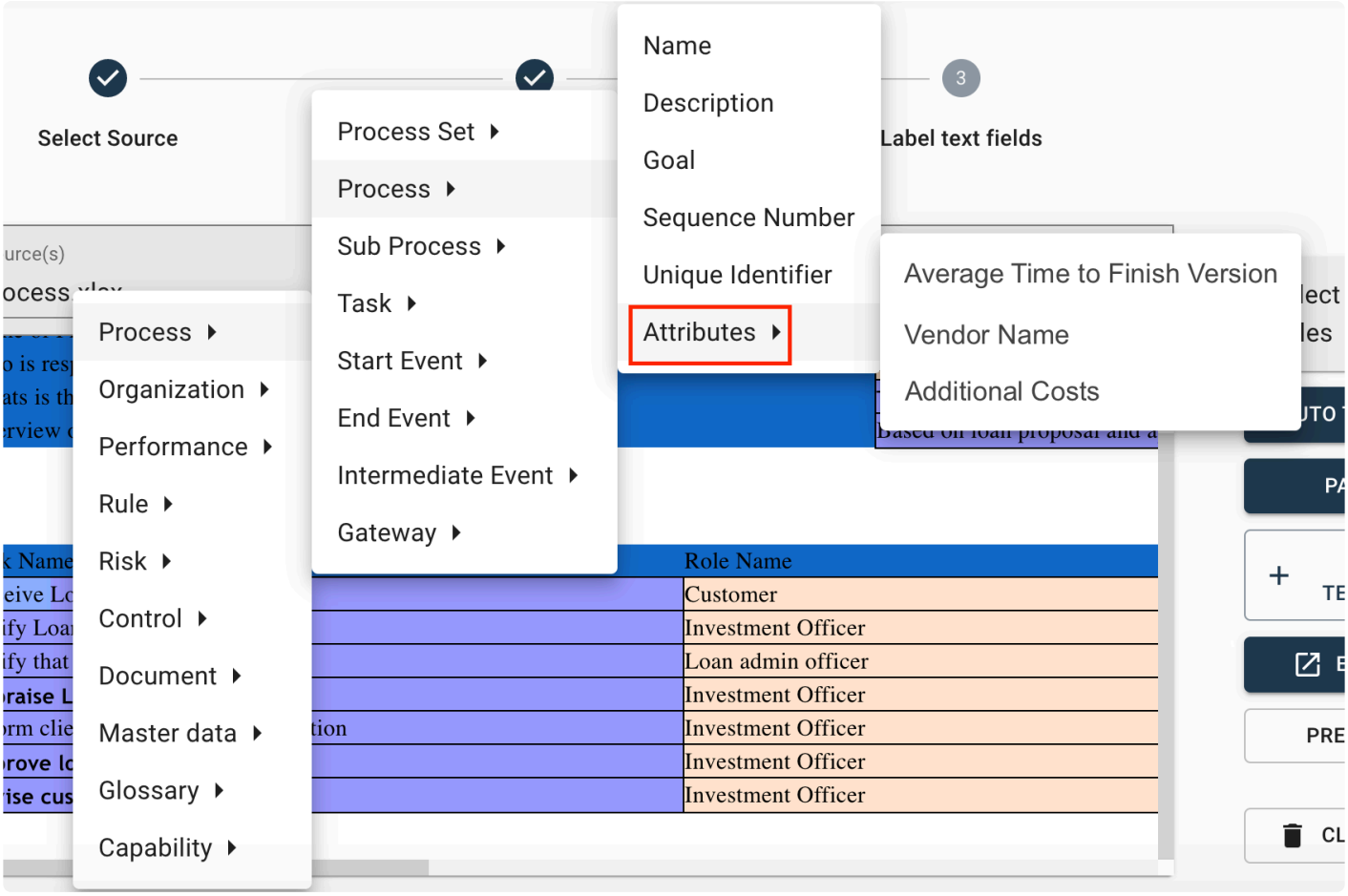
5.1.2. Task Color Code Tag

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.



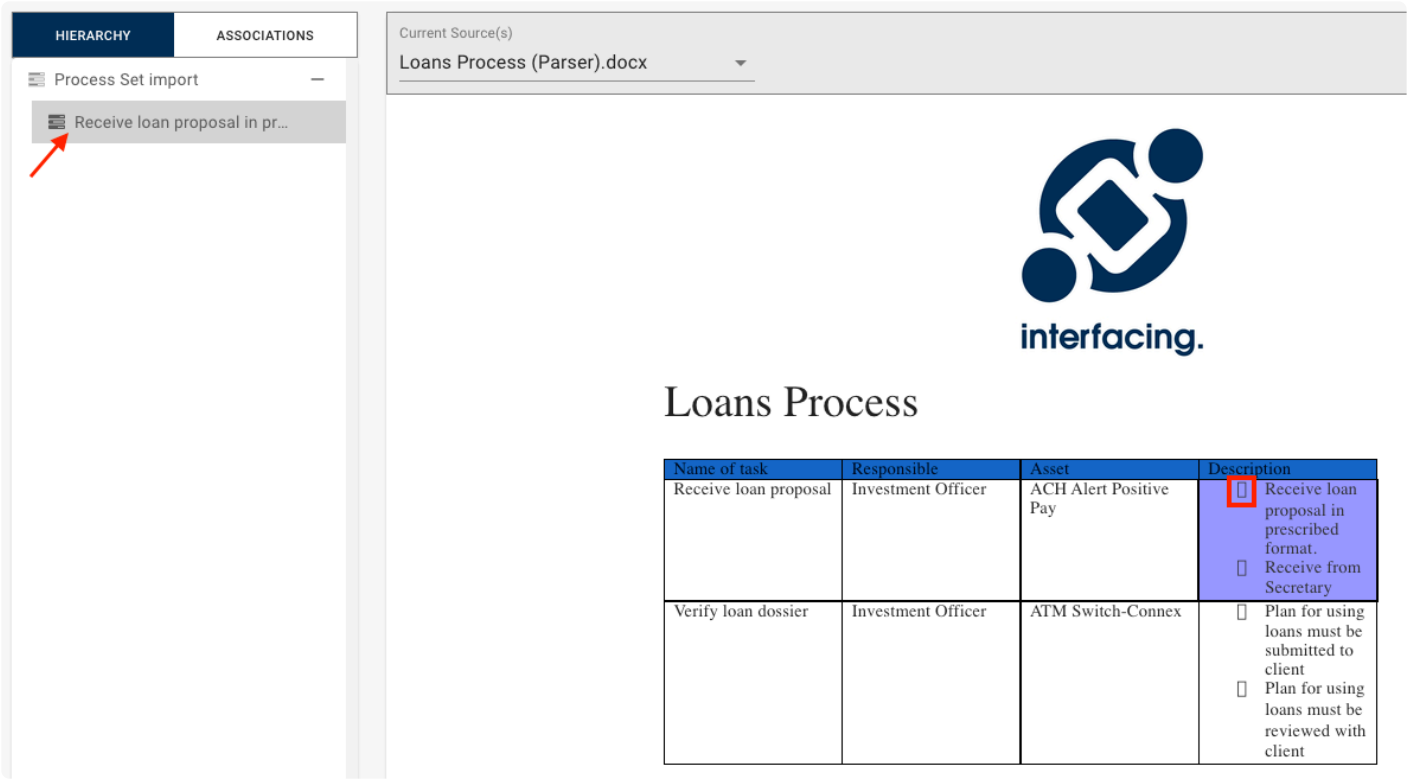
5.1.3. Support for Attributes and Category Types

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



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.



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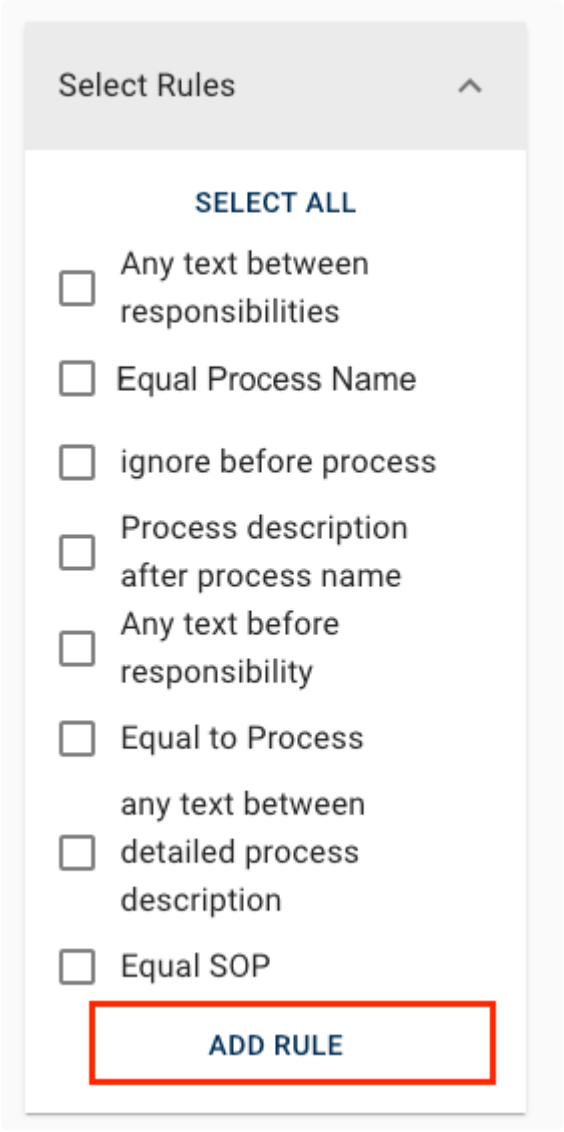
5.1.5. UI Enhancements

“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.



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.

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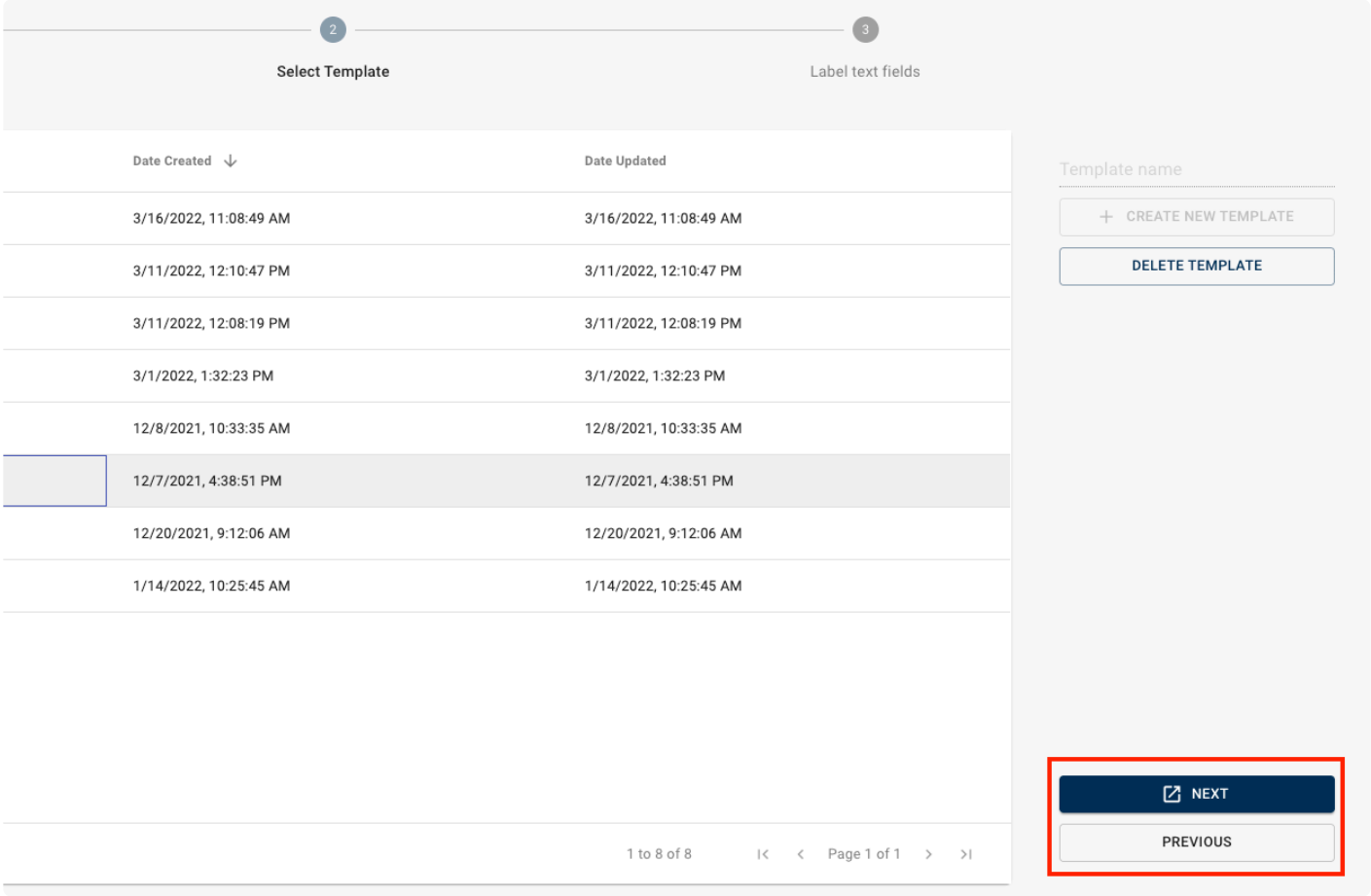

Radio Buttons in Export Settings

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

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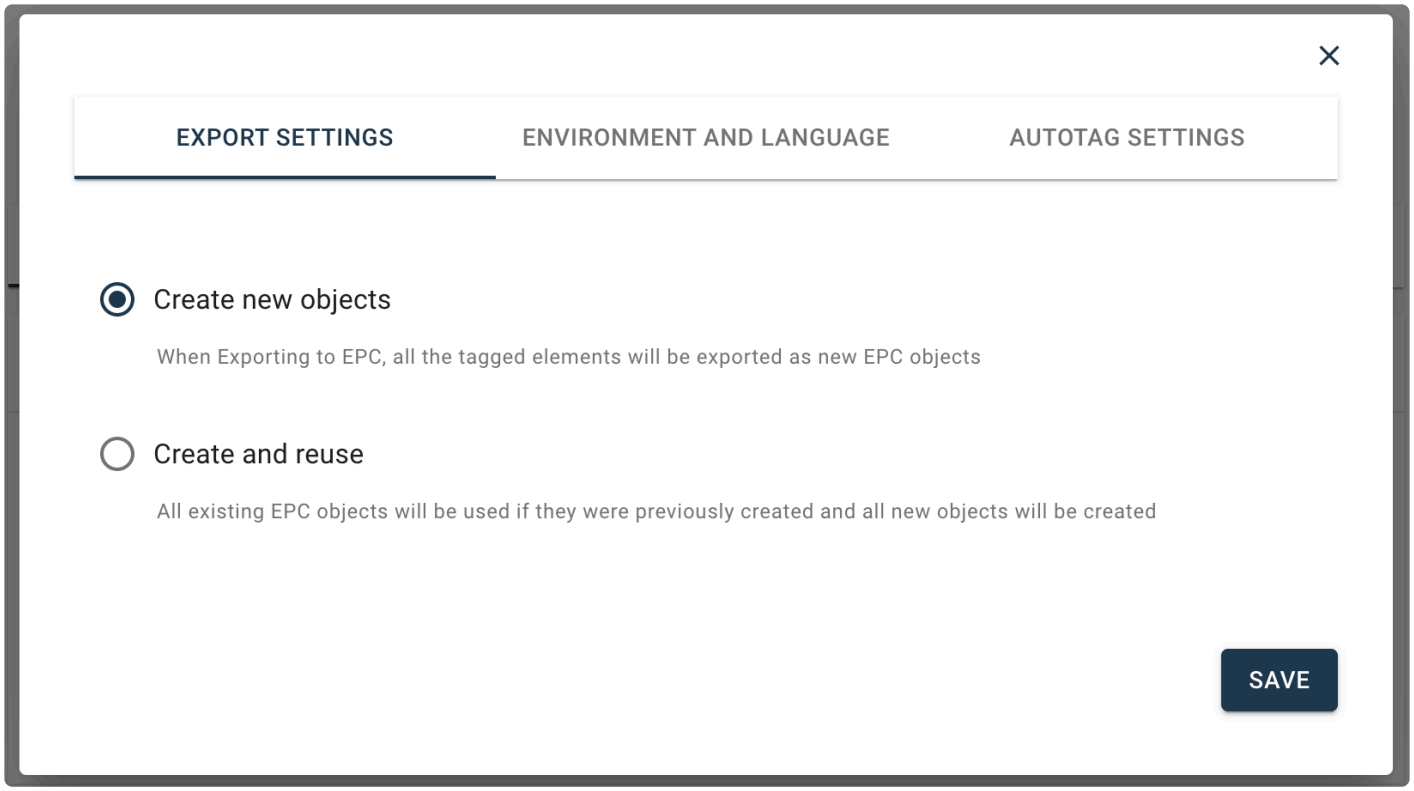

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5.2. FIXED ISSUES

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.

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6. EPC MOBILE APP

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

- What’s new in EPC mobile app
- Fixed issues

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6.1. WHAT'S NEW IN EPC MOBILE APP

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.

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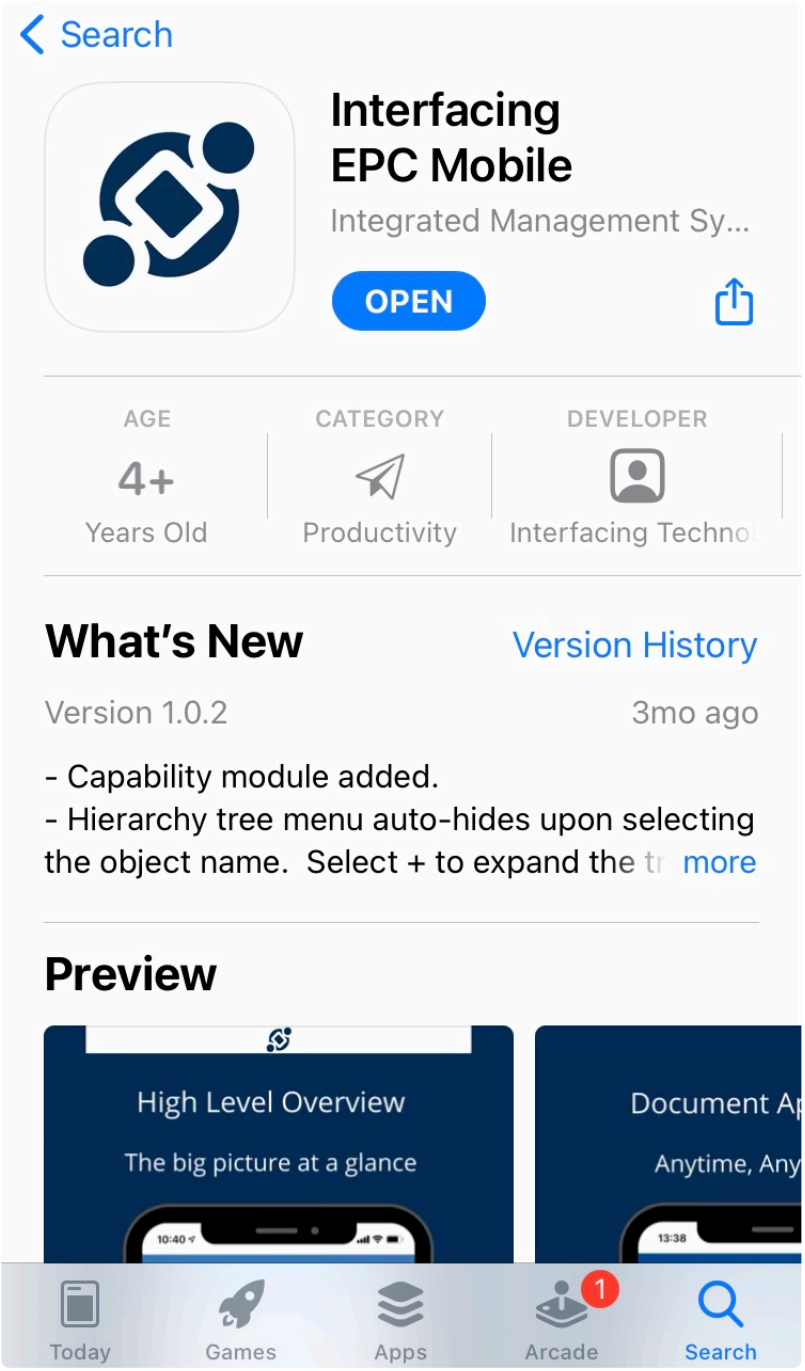
6.1.1. Update of the App Icon

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



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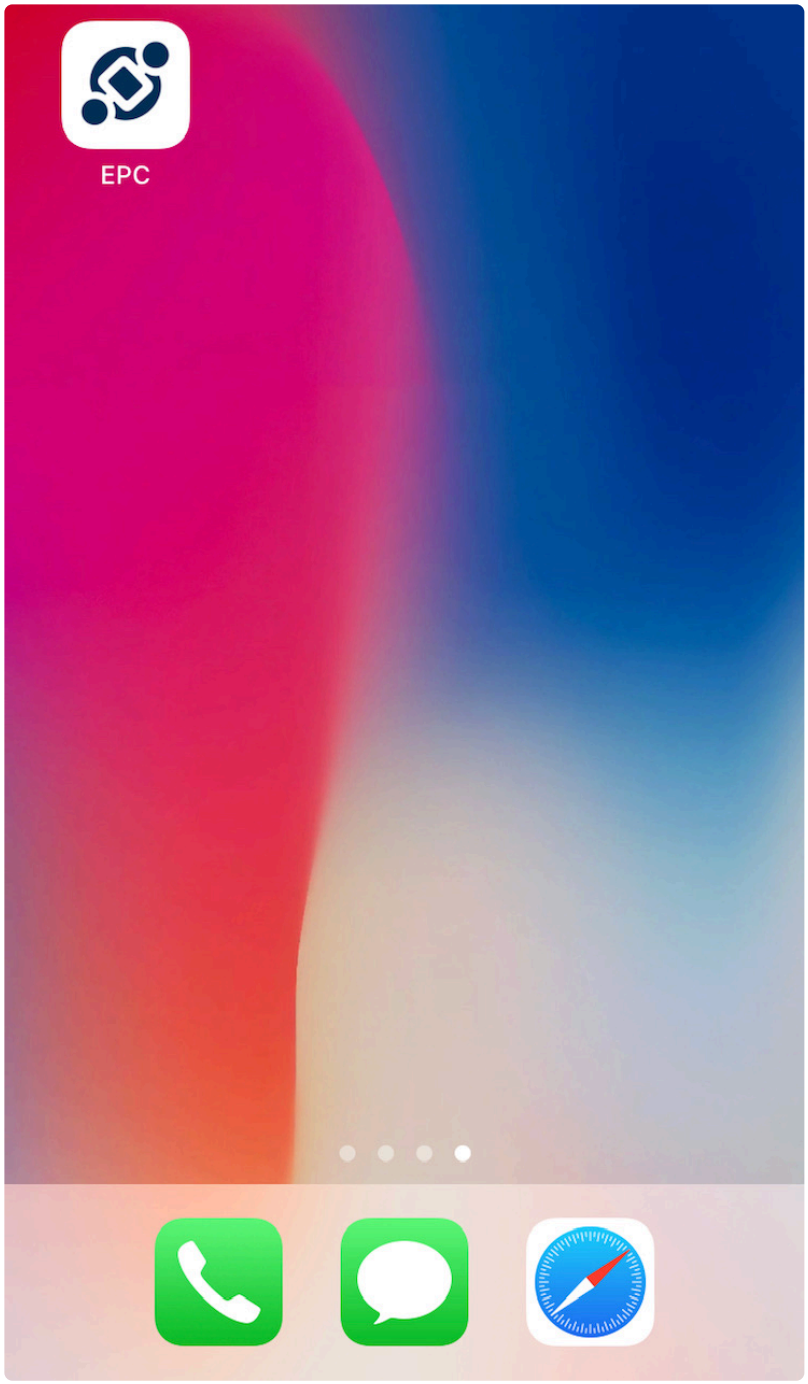

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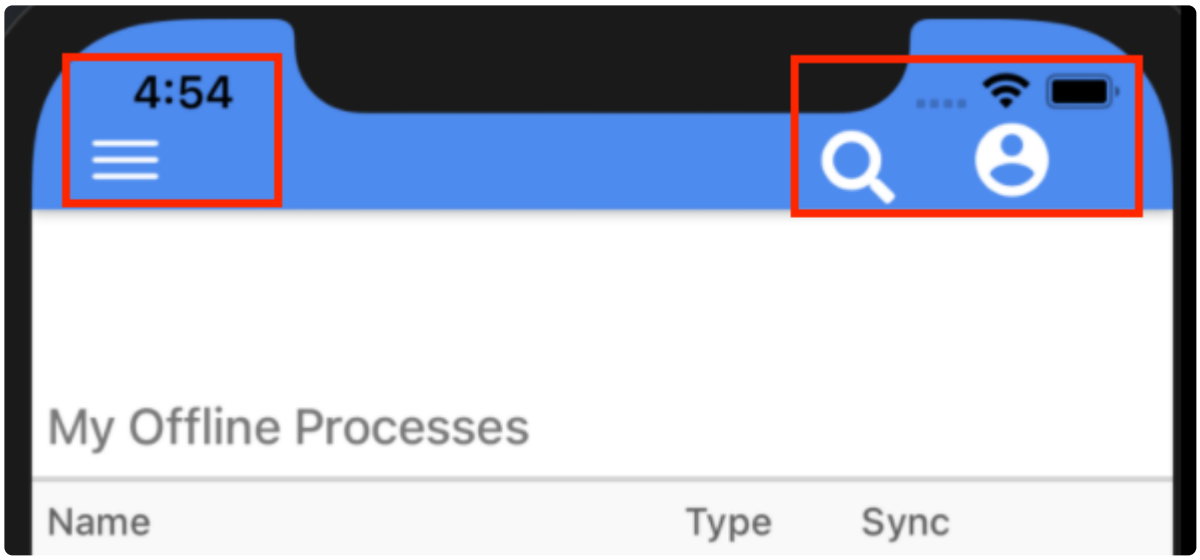
6.1.2. Header Icons

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.



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

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.

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6.2. FIXED ISSUES

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.

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