

# **EPC Release Notes**

13.2 — Last update: Dec 18, 2022

Interfacing Technologies Corporation

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# Release Notes 13.2

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The following major new enhancements and capabilities have been introduced in the 13.2 release.

Here's where to find:

- [What's New in EPC 13.2](#)
- [Feature Improvements](#)
- [Fixed Issues](#)
- [EPC Mobile App Fixed Issue](#)
- [What's New + Feature Improvements in Process-Mining Parser](#)

# Disclaimer

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# WHAT'S NEW IN 13.2

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The following major new features have been introduced in this EPC 13.2 release:

- [Changing Security on Objects and Environments – Direct Permissions](#)
- [Manage Permissions through Groups](#)
- [Granular Authorization to Publish, Merge, Import and Export Objects](#)
- [Shortcut to Toggle Between Published and Draft Version](#)
- [Multilingual Widget Names](#)
- [Ability to Create Records with Read Published or Read Latest Security Permission](#)
- [New User-Defined Attribute \(UDA\) for Date Type](#)
- [New Widget Filter to Display Published or Latest Content](#)
- [Ability to Resize Hierarchical Tree](#)

# **Improvements to EPC Environment and Object Security**

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# Changing Security on Objects and Environments – Direct Permissions

The security feature on EPC objects evolved to direct permissions. Organizations can now define the security of groups or users by assigning them read published, read latest, write or delete permissions on environments, sets, folders and objects, all independently or including their children objects.

## Why is direct security preferable?

Direct permissions are useful for organizations with many departments or employees to control sensitive files and to specify who has access to what information. In this sense, security association tracking is clear and easy to report without complex documentation. Moreover, this feature increases system performance as almost no computing time is required.

**Edit Security of: Marketing**

Some users and roles do not appear in the list by default if they are not given explicit permissions to the environment or a predecessor object in the hierarchy. To add a user or role to the list, type the user's username, first name, or last name, or the role's name, and click to add it. By default the user or role will be granted Allow Read permission.

Add User or Role: NOTHING SELECTED market

Name	Type	Permission	Include Children
Chuck (Chuck)	USER	WRITE	Apply to Children
Marie (marie.b)	USER	DELETE	Apply to Children
Market Analyst	ROLE	WRITE	Apply to Children
Marketing team	GROUP	READ LATEST	Apply to Children

Dropdown menu for Marketing team:

- READ LATEST (selected)
- READ PUBLISHED
- WRITE
- DELETE

## Permission Levels

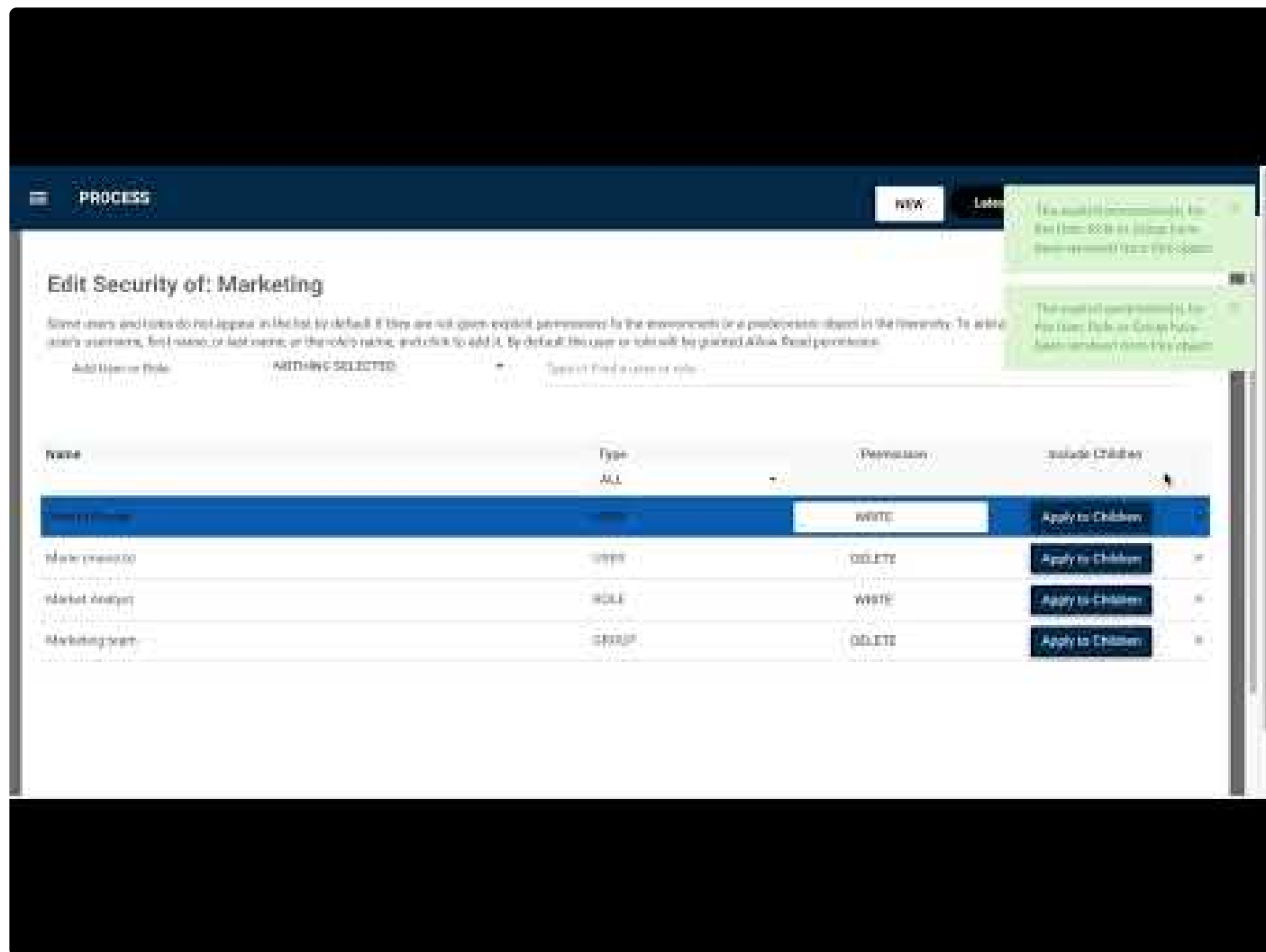
- Read published: users will be able to see **only** the published version of the object and won't see "in progress" (draft) versions. Additionally, they won't be able to edit or delete the object.
- Read latest: users will be able to see **all** versions of the object but won't be able to edit or delete it.
- Write: users will have access to all versions of the object as well as editing rights but won't be able to delete the object.
- Delete: users will have access to all versions of the object. They can also edit and delete. **Modelers** with this permission can set object security.
- Environment Admin: users will be administrators in the chosen environment. They will have Delete permission on all objects in the environment as well as being able to access the environment admin

section and set security permissions on objects.

	See published versions	See all versions, drafts	Can edit the object	Can delete the object	Can set security perm.	Access to Env. Admin Section
Read published	X					
Read latest	X	X				
Write	X	X	X			
Delete	X	X	X	X	If Modeler, yes	
Env. Admin	X	X	X	X	X	X

As an example, you could assign the “delete” permission on a set to a group, but only grant them “read latest” on a more delicate folder within that set, ensuring that nobody in the group will be able to edit or delete. This new way of assigning security allows to set **independent** and **micro-settings of security**. More information about the rules of this feature can be found in our [user manual](#).





<https://www.youtube.com/embed/LfFK9tmBvLo?rel=0&autoplay=1>

On the other hand, if your security needs are simpler, it is possible to set these permissions at the environment level. This way, you can assign permissions at once, for all objects in the environment.

**ADMIN**

GENERAL ENVIR

**Edit Environments of: marie.b**

To add a environment to the user, type the desired environment name below and click on the desired environment name within the drop down list.

Select an Environment

Environment	Environment Admin	Environment Permission	Apply to all objects
Banking	<input type="checkbox"/>	NONE	<button>Apply to All Objects</button>
<b>Enterprise</b>	<input checked="" type="checkbox"/>	NONE	<button>Apply to All Objects</button>
Entreprise	<input checked="" type="checkbox"/>	NONE	<button>Apply to All Objects</button>

READ PUBLISHED

READ LATEST

WRITE

DELETE

« < 1 > »

Show: 10 - 25 - 50

Close

✿ For more information on this new feature, [click here](#).

# Manage Permissions through Groups

It is now possible to add or remove groups in the security permissions edition to grant or restrict access to EPC objects quickly and easily to a large number of users at once. For more information on this new feature, [click here](#).

PROCESS

NEWLatest

Edit Security of: Marketing

Some users, roles and groups do not appear in the list by default if they are not given explicit permissions to the environment or a predecessor object in the hierarchy. To add a user role, or group to the list, type the user's username, first name, or last name, or the role or group name, and click to add it. By default the user, role or group will be granted Allow Read permission.

Add User, Role or Group

NOTHING SELECTED

Select AllDeselect All

USER

ROLE

GROUP

Type to Find a User, Role or Group

Name	Type	Permission	Include Children
Chuck (Chuck)	ALL	READ PUBLISHED	Apply to Children ×
Marie (marie.b)	USER	DELETE	Apply to Children ×
Marketing team	GROUP	DELETE	Apply to Children ×

# Granular Authorization to Publish, Merge, Import and Export Objects

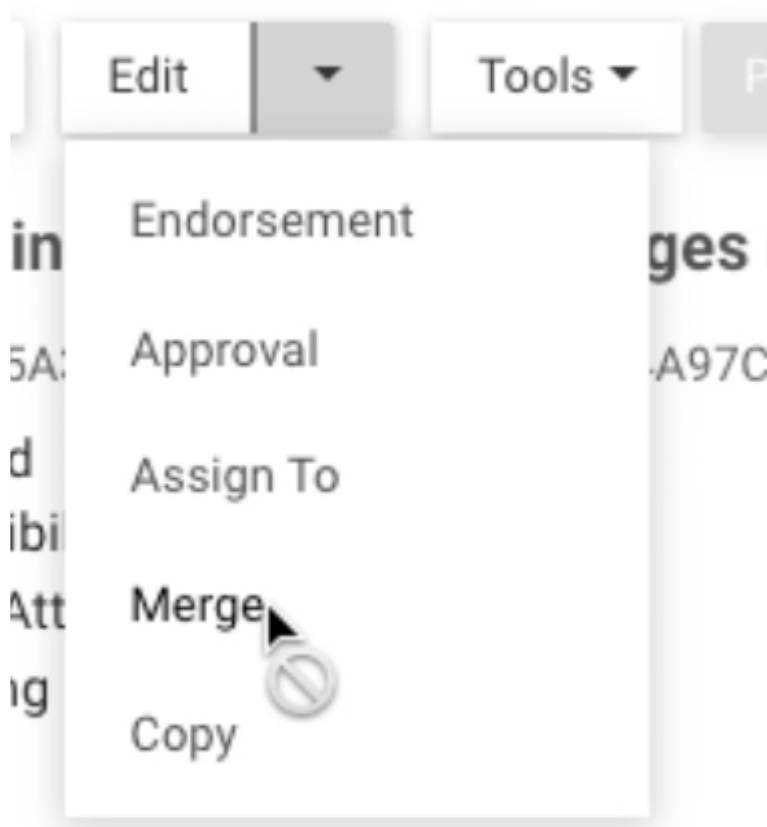
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This new feature allows organizations to **grant or deny** their modelers the right to publish and/or merge objects and their environment admins to import and/or export content. Thus, security permissions are more granular and precise to ensure greater security on your system and data.

## If we only grant publish to a modeler:

	Select All	Deselect All
Modeler	<div><div>PUBLISH ✓</div><div>MERGE</div><div>IMPORT</div><div>EXPORT</div></div>	
Access to EPC Portal		
System User		
Authorized to	<div>PUBLISH ▲</div>	

## They won't be able to merge objects:



For more information on this new feature:

- [How to add/remove these authorizations to a user](#)
- [How to add/remove these authorizations to a group](#)

# Shortcut to Toggle Between Published and Draft Version

A toggle button has been added next to the “New” button for an easier and faster navigation between “Show Latest” and “Published Only” display modes, making it easier for users to switch from published templates to draft records, for example. For more information on this new feature, [click here](#).

## Template in “Published” view

The screenshot displays the 'DOCUMENTS' interface. At the top, a dark blue header bar contains a menu icon, the word 'DOCUMENTS', and a 'Published' toggle button (a white circle with a blue dot) which is highlighted with a red rectangle. To the right of the toggle are icons for refresh, search, notifications, and a user profile. Below the header, a sidebar on the left shows a tree view under 'ENTERPRISE' with items: '+ Default template set', '- Marketing', '- Marketing Management', and 'Physical Adds' (highlighted with a blue bar and a red rectangle). The main content area is titled 'review of ads template.docx' and shows a document preview. It includes a 'UID: 4F0B38EA-D8DE-4266-B325-302E905CD66D' and a 'Description' section. The description is structured as follows:

- Ad review structure**

When writing your review, keep the format below. Replace **Ad Review Structure** with a catching title.
- Introduction**

It is essential to begin with a short summary of your ad review to your marketing team to help them to know your primary and most important points before they start to read.
- Body**
  - Write a point per paragraph. Let's say you are talking about the creativity of the ad, do so in a paragraph. The next section should be about another feature.
  - Describe the product they've chosen as the sample and analyze it in and out and tell your reviewee whether he or she is compliant with the development of the product being advertised.

At the bottom of the document preview, there is a note: 'Please note, you don't need to agree with the ad implicit message. Argue your claims in the essay as there's no right or wrong answer about the'.

## Record of the template in “Latest” view

The screenshot displays the 'DOCUMENTS' section of the Interfacing Technologies Corporation interface. The top navigation bar includes a 'NEW' button and a 'Latest' view selector, which is highlighted with a red box. Below the navigation bar, the left sidebar shows a tree view of the document structure, with 'Reviews' highlighted in blue and outlined in red. The main content area shows the details of the selected document, 'Copy of review of ads template.docx', which is marked as a 'Draft'. The document content includes a description, an 'Ad review structure' section, and an 'Introduction' section. The 'Ad review structure' section contains a list of bullet points and a note at the bottom.

**DOCUMENTS** NEW Latest 🔄 🔍 🔔 ⋮

**ENTERPRISE** << LIST GRAPH DETAILS 👤

+ 📁 Default template set  
+ 📁 Marketing  
- 📁 Product  
+ 📁 Product  
**📁 Reviews**

📄 📄 📄 Copy of review of ads template.docx [Draft]

UID: 0B87AC89-3F3B-494F-AC3B-FA7B270345F9

▼ Description

**Ad review structure**

When writing your review, keep the format below. Replace **Ad Review Structure** with a catching title.

**Introduction**

It is essential to begin with a short summary of your ad review to your marketing team to help them to know your primary and most important points before they start to read.

**Body**

- Write a point per paragraph. Let's say you are talking about the creativity of the ad, do so in a paragraph. The next section should be about another feature.
- Describe the product they've chosen as the sample and analyze it in and out and tell your reviewee whether he or she is compliant with the development of the product being advertised.

Please note, you don't need to agree with the ad implicit message. Argue your claims in the essay as there's no right or wrong answer about the

# Multilingual Widget Names

It is now possible to customize widget names for each content language supported by EPC to allow multilingual organizations that may operate in multiple locations to let each user choose their preferred language. For more information on this new feature, [click here](#).

## Add Name in Other Languages

العربية

أفعالي

English

My actions

français

Mes actions

中文

我的行动

Confirmer

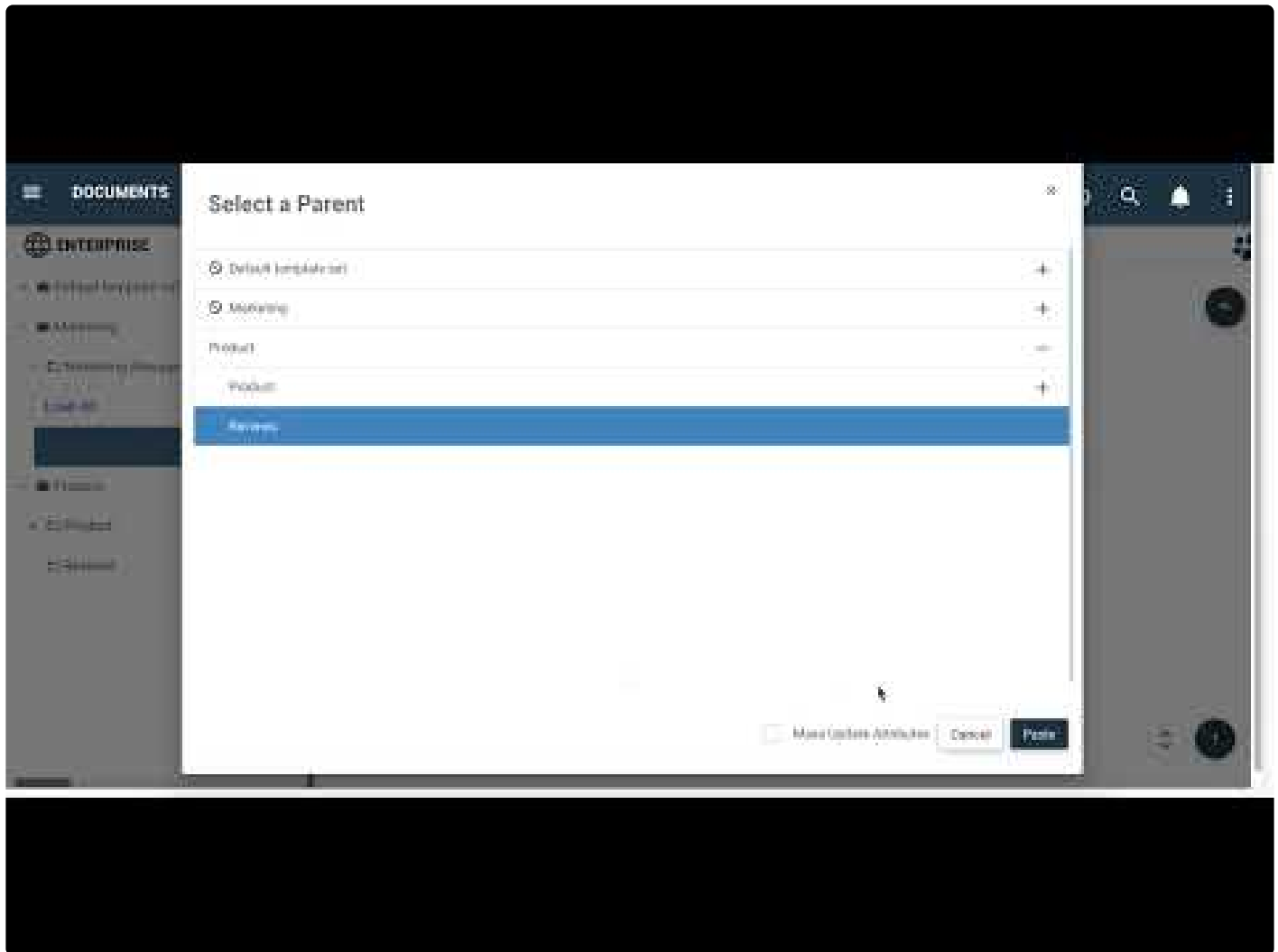
## Mes actions

Nom	Type d'action	En attente depuis ▲	Type
[en] Average days between opening and fill	Confirmation	25-sept.-2019	KPI
[en] Resources will be wasted interviewing candidates who are obviousl...	Confirmation	25-sept.-2019	Risque
[en] A candidate must be interviewed at least twice before they can be h...	Confirmation	25-sept.-2019	Règle
[en] Human Capital Management	Confirmation	14-févr.-2022	Processus
[en] Human Capital Development	Confirmation	17-févr.-2022	Processus
[en] Job Interview Procedure	Confirmation	28-avr.-2022	Processus
[en] Reviews of past budget periods must be done at a high level for the...	Confirmation	06-mai-2022	Règle
[en] Discrepancies notification template	Confirmation	13-juin-2022	Document
[en] Purchase order	Confirmation	13-juin-2022	Document
[en] Purchasing	Révision	14-juin-2022	Processus
[en] Cost per external hire	Confirmation	23-juin-2022	KPI



# Ability to Create Records with Read Published or Read Latest Security Permission

Users with read published/latest security permission can now create records of documents. This allows users to create copies of published templates, for example, in folders where they have write or delete permission, so that they can edit it according to their needs. For more information on this new feature, [click here](#).



<https://www.youtube.com/embed/jFHfM39K1xc?rel=0&autoplay=1>

# New User-Defined Attribute (UDA) for Date Type

The new Date Type user defined attribute (UDA) has been added to EPC, allowing organizations to create and import/export short date data types (YYYY-MM-DD). For more information on this new feature, [click here](#).

The screenshot displays the EPC interface with a sidebar on the left containing 'Release Date' and 'Requirements' sections. The main area features a date picker for the 'Release Date' field, which is currently set to '2022-07-22'. A calendar for July 2022 is open, showing the date '22' selected. The calendar includes navigation arrows, a month/year header, and a 'Clear' button at the bottom. The background shows a rich text editor with various formatting tools.

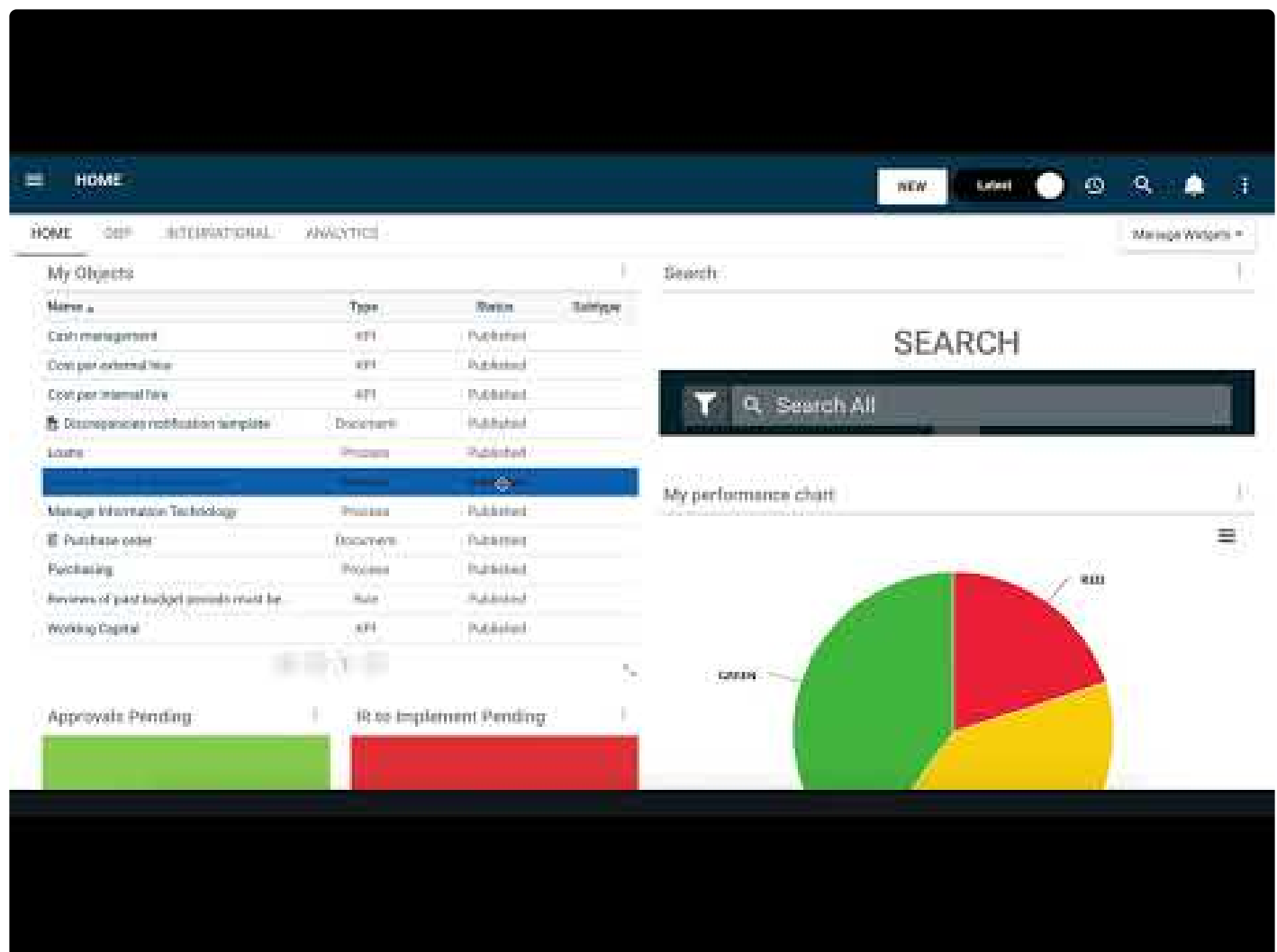
Su	Mo	Tu	We	Th	Fr	Sa
26	27	28	29	30	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31	1	2	3	4	5	6

# New Widget Filter to Display Published or Latest Content

Users now have the ability to filter the displayed content in their widgets to:

1. See only published objects
2. See published and in-progress objects (latest draft)
3. Let the widget automatically switch between 1. and 2. when the user switches between “Published” and “Latest” views with the [new toggle button](#)

This allows users to only see published content in their widgets even if they are working in the “Show Latest” view, for example. For more information on this new feature, [click here](#).



<https://www.youtube.com/embed/sxJYpV5u7mE?rel=0>

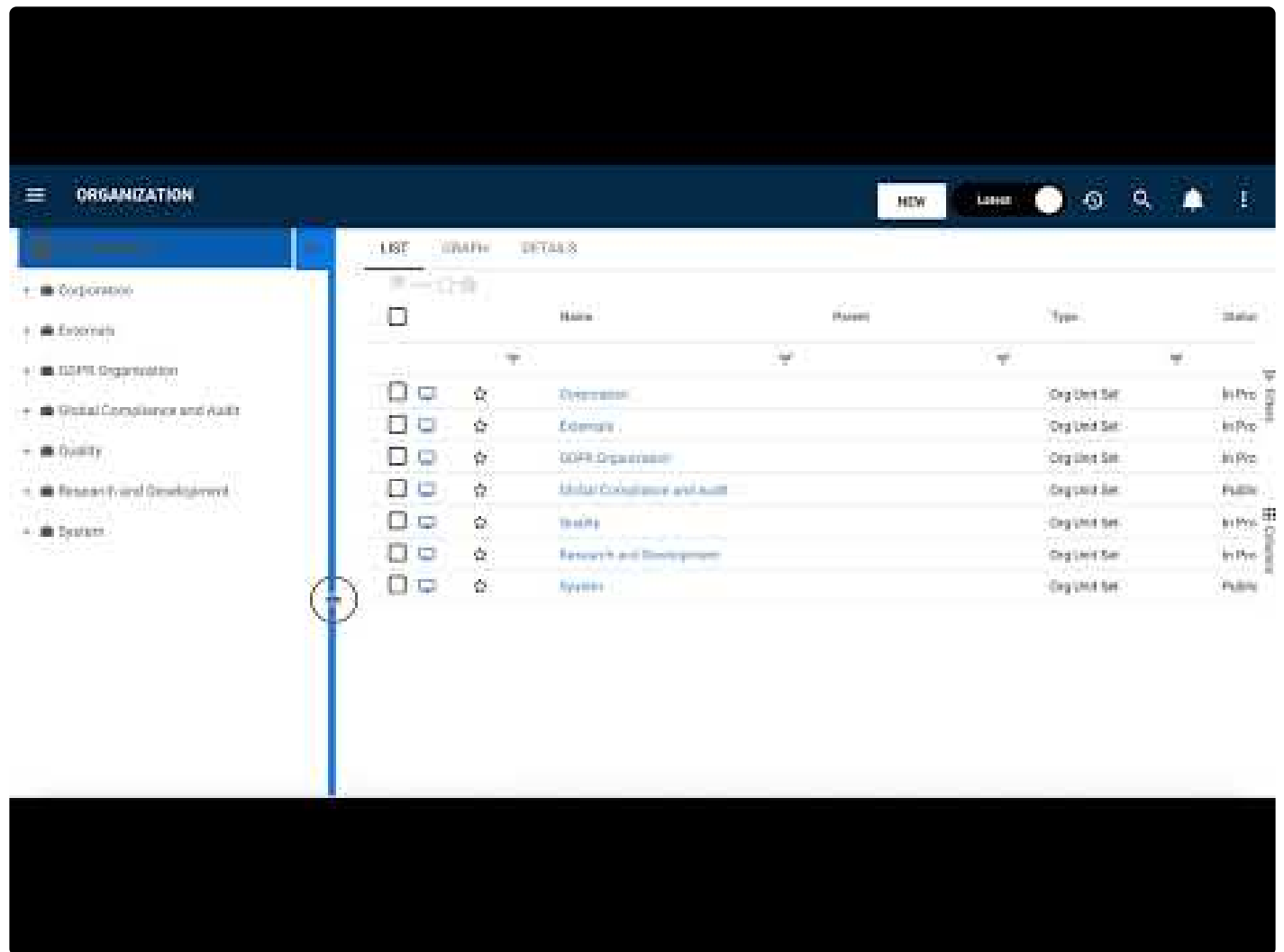
This new feature applies to these widgets:

- My Documents

- My Performance
- My Objects
- My Flow Objects
- My Performance Chart
- My Risk Chart

# Ability to Resize Hierarchical Tree

The hierarchical tree can now be expanded and collapsed in all page views (List, Graph and Details) allowing better visibility of object names which can sometimes be too long to display in full with the default size. For more information on this new feature, [click here](#).



<https://www.youtube.com/embed/rgtQ3J1ZHbY?rel=0&autoplay=1>

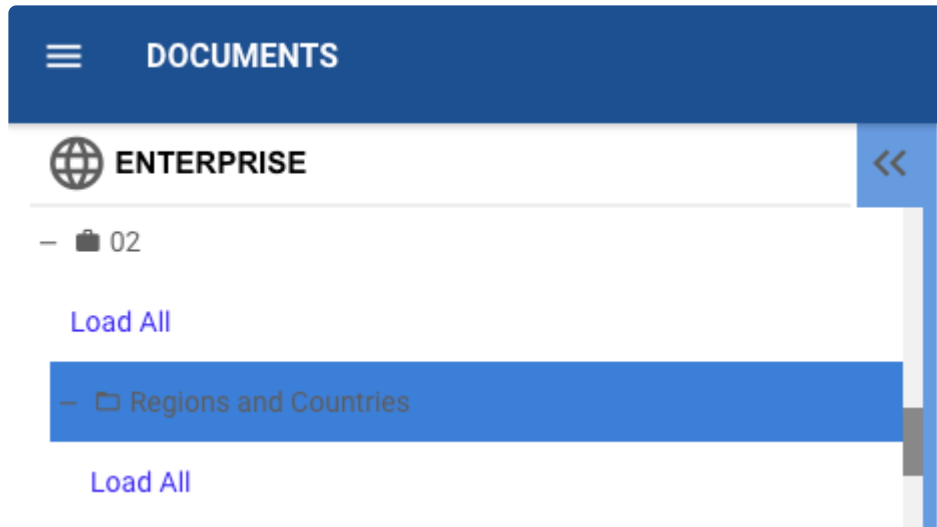
# **System Administration Enhancements**

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# FEATURE IMPROVEMENTS

## “Load All” button in Documents Module

To make the application more efficient and manage to expand the sub-folders almost instantly, the tree will show the “Load All” button if a set or folder has more than 9 sub-folders, allowing to gradually load all its child folders. This functionality considerably reduces the calculation time which increases the performance of the tree. To have more information on this feature, [please click here](#).



## Attribute Value Place Holders Changed To Expected Format

The place holder of attribute type values in the “What are the attributes” section of any form now reflect the expected format that users should fill in to properly save their changes.

JIRA Number

Maintenance or Renewal Date

Next Audit date

A screenshot of a form with three input fields. The first field is labeled 'JIRA Number' and contains the value '0'. The second field is labeled 'Maintenance or Renewal Date' and contains the placeholder text 'DAYS HH:MM:SS'. The third field is labeled 'Next Audit date' and contains the value '0'. The input fields are white with a light gray border and are grouped together. A red rectangular box highlights the entire group of input fields.

## Versioning and Impact sections added to Glossary Set and Folder Detail Expand (+)

The versioning and impact sections were added to the details page when expanding a Glossary set or folder.

The screenshot shows the GLOSSARY interface. On the left, a tree selector lists 'Business' and 'Financial'. 'Business' is highlighted in blue. On the right, the 'DETAILS' tab is active, showing the 'Business' object with a '[Draft]' status. Below the object name, the UID is displayed: 06FA2BB7-FEEA-4AB2-8860-7B5642AA6E3F. A red box highlights the 'Versioning' and 'Impact' links.

### Newly Created Object Highlighted in Tree Selector

Objects created from the tree selector are now highlighted, letting users know where the new object is located in the list.

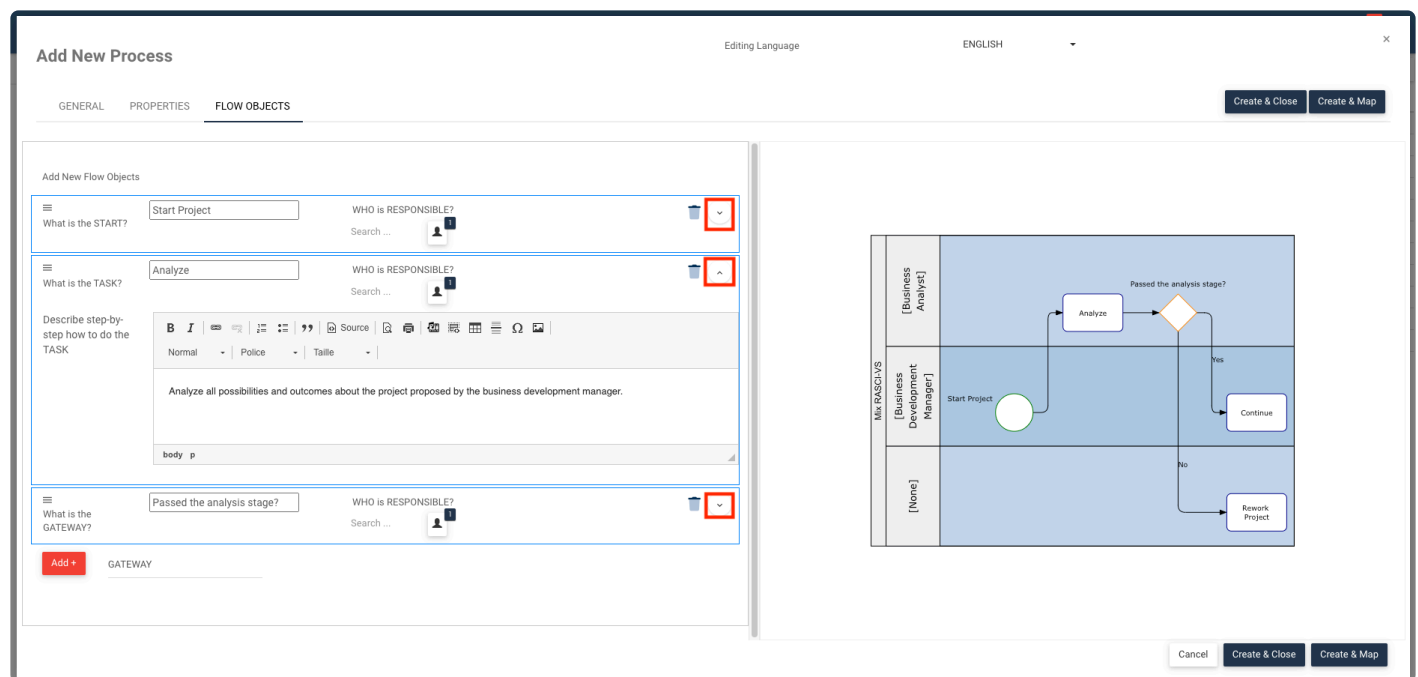
The screenshot shows the 'Edit Process' dialog. On the left, the 'GENERAL' tab is active, showing a tree selector with 'Head Office' and 'Financial'. 'Financial' is highlighted in blue. On the right, the 'ORGANIZATION' list is displayed, showing various roles. 'Financial Officer' is highlighted in blue. A red arrow points to 'Financial Officer' with the text 'Newly Added Role Highlighted'. The 'Save & Close' button is visible on the right.

### Process Creation “Flow Objects” Tab Optimization

- You can now add gateways, which will allow users to build and visualize processes with added complexity from the form.
- Objects added in the “flow objects” tab of the process creation form now retract to make the UI simpler and clearer.

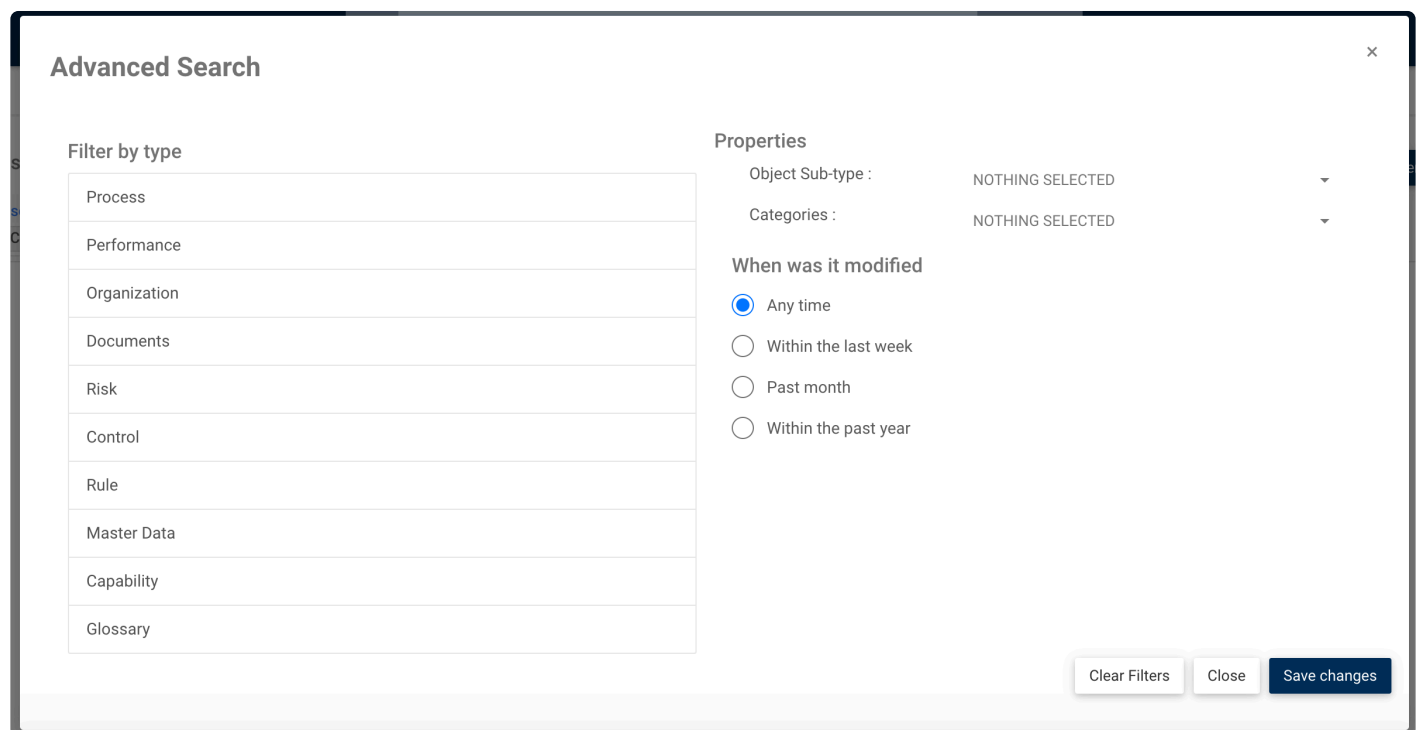


- The flow objects tab is now divided, where flow objects are displayed on the left and the map on the right, allowing users to always see the map being built.



### SubType and Category Filters Added to Search

SubType and category filters have been added to the search function allowing organizations using with these attributes to quickly find objects



### Possibility to Preview or Download Documents from the Details Expand (+)

Preview and download icons have been added to the details expand in the Documents module allowing

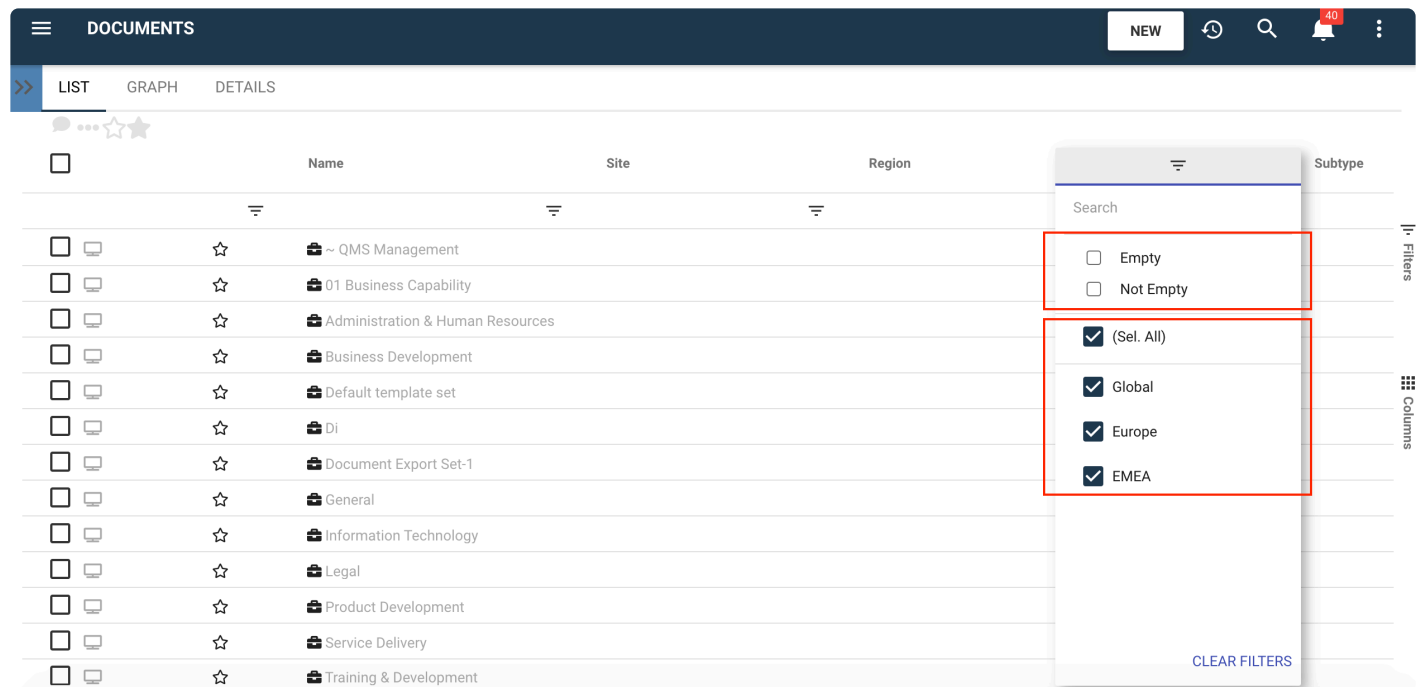
users to perform these actions without the need to access the child document's Details page.

The screenshot displays the EPC Documents interface. On the left, a sidebar shows a menu with 'Marketing' (selected) and 'Product'. The main area lists documents under the 'Marketing Management' folder. Each document entry includes a computer icon, a folder icon, the document name, a draft status indicator, a UID, and a list of actions (Versioning, File Details, Custom Attributes).

Document Name	UID	Status	Actions
Marketing Management	D633223E-E9F0-413C-91B0-F1DF42B6C41D	[Draft]	> Versioning
Branding	ECFC7489-05FD-4686-AD70-B71456E54679	[Draft]	> Versioning
brading color image.jpg	44574428-1B92-41F8-A97B-15423331D879	[Draft]	> File Details > Custom Attributes > Versioning
branding guide.pdf	C71C6879-A9C3-4B98-BD7E-374D90B56521	[Draft]	> File Details > Custom Attributes > Versioning
branding log.xlsx	EDABBF39-5033-447B-9CC3-E50BD23477CC	[Draft]	> File Details > Custom Attributes > Versioning

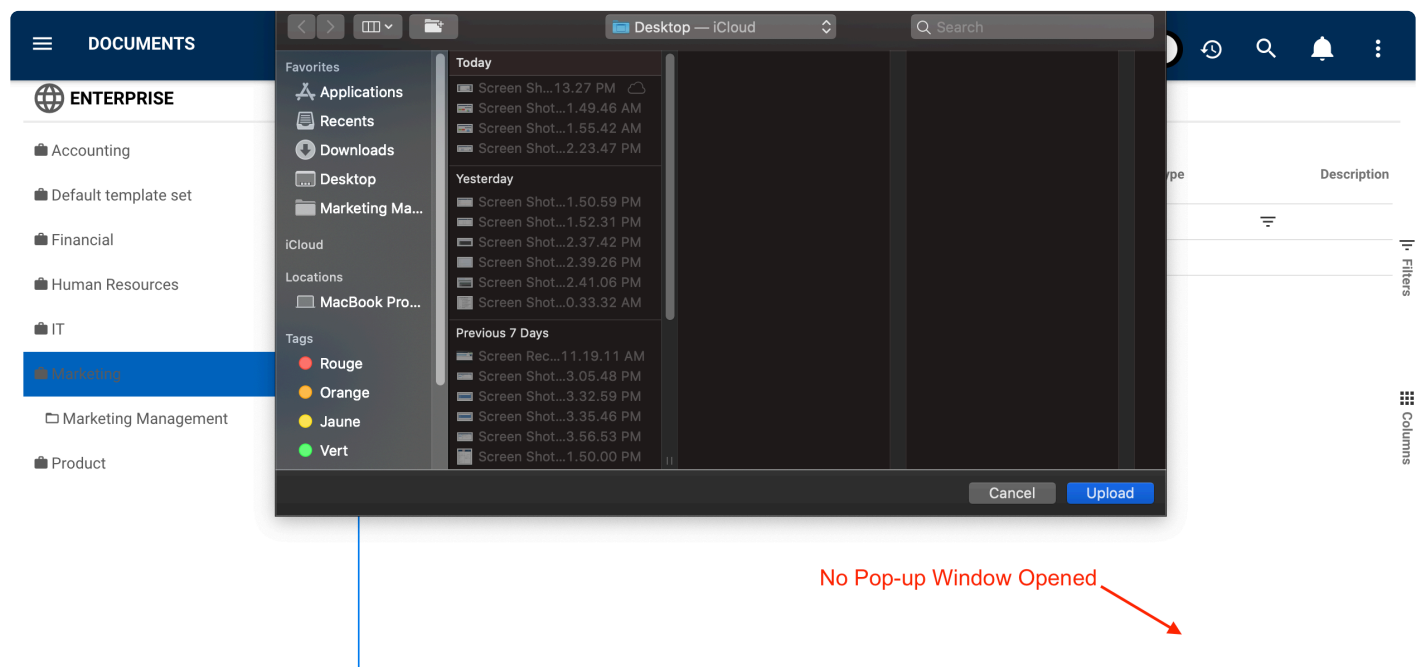
### Filter Columns Enhancement for all Modules

The filter columns in the List page of all EPC modules now include all possible values within the drop-down in addition to the empty/not empty option (exception for the subtype column).



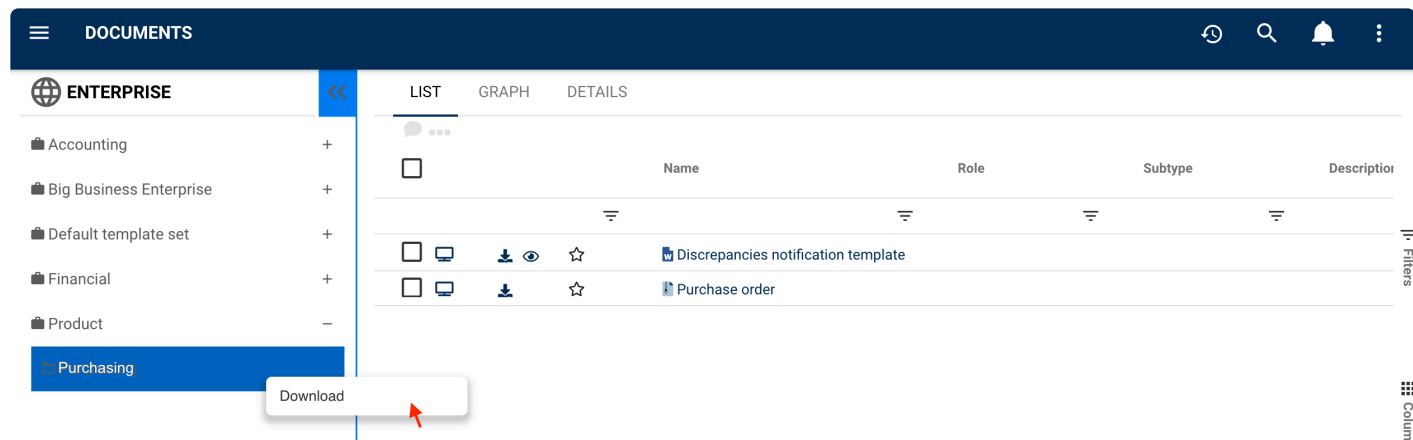
## Mass Document/Folder Upload

The Uploading Folder or Uploading Documents pop-up does not open before the user has selected the upload button.



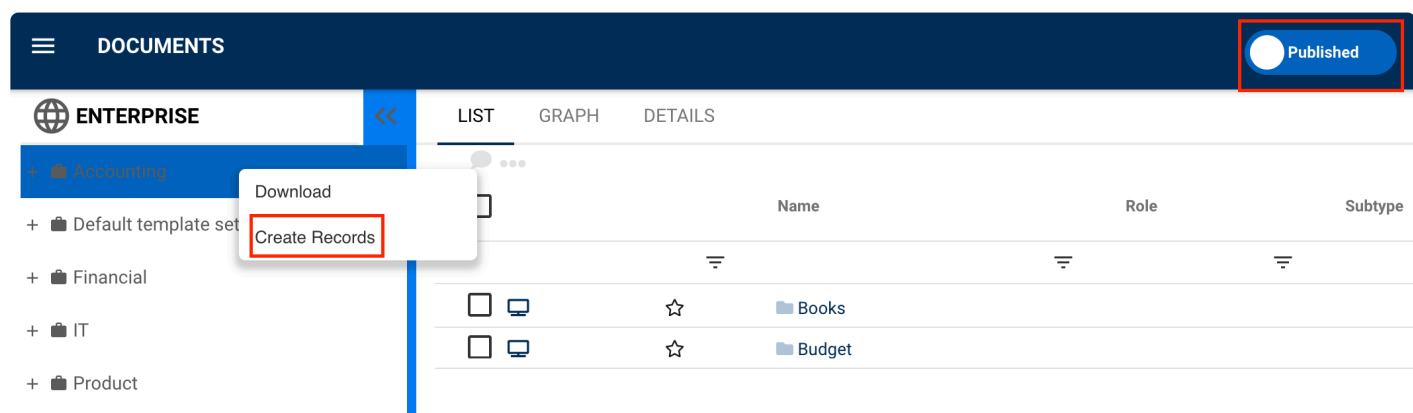
## Right-Click Actions – Documents Module

With read permission, right-click functionalities do not appear in the UI except for the download function.



### Right-Click Actions – Create Records in Published view

The option to create records is now available in the right-click menu when users are in the published view to create records without needing to go to the Details page.




### New Label for Create Records Feature


The label of the create records action changed from Create Record(s) to Create Records.

LIST

GRAPH

DETAILS








New ▾

Edit ▾

Tools ▾

*Published version*

  **Books** 

UID: 578EF0B0-4B3F-46E9-BC

> Versioning

> Impact

Endorsement

Approval

Security

Move

Copy

Create Records

Delete

### Republishing Version

When republishing an object that was unpublished, the default version setting is now *Keep Previously Published Version Number*.

### Publish Confirmation

Would you like to publish this object?

Comment

Version:

☐ Major ☐ Minor ☒ Keep Previously Published Version Number

## Search Indexing

- It is now possible to pause and resume the search indexing of items, for example if a re-configuration of resources is needed as the indexing is running.
- The “Rebuild” button allows to reindex out-of-date objects without deleting the index of existing objects.

SEARCH\_LOADED

232



## Hierarchy Filter in Tree

The default hierarchical filter is now set to “Current Level” when a user selects a set or folder in the tree.

The screenshot displays the EPC interface. At the top, there is a dark blue header bar with a 'NEW' button, a 'Latest' toggle, and icons for refresh, search, notifications, and a menu. Below the header, there are tabs for 'LIST', 'GRAPH', and 'DETAILS'. The 'LIST' tab is active, showing a table with columns: Seq #, Name, and Role. The table contains three rows, each with a checkbox, a monitor icon, a star icon, and a name ('Process 1', 'Process 2', 'Process 3'). To the right of the table is a 'Hierarchy Filter' sidebar. It has three radio buttons: 'Current level' (selected), 'Current level & below', and 'No hierarchy filter'. Below these are expandable sections for 'Favorite', 'Seq #', 'Name', 'Role', 'Documents', 'Description', 'My RASCI-VS', 'Type', and 'Performance'. At the bottom of the sidebar is a 'Clear Filters' button. On the far right, there is a 'Columns' sidebar with a grid icon and a list of columns.

### List Page Column Filters Clear when Navigating

Filters defined in columns on the List page now clear when users navigate through the tree.

### Copy and Record Creation Limit

The limit for copying objects and creating records is set to 500 objects to improve performance. For example, users cannot create a record of a folder that contains more than 500 documents.

### Draft or Published Status in EPC Links

A user that accesses a shared object will be redirected to the “Published Only” view when the object is already published, even if they were in “Show Latest” view before accessing the object.

### Automatic Language Toggle when Sharing an EPC Link

The preferred interface and content language are kept when sharing an EPC link. For example, if users share an object while their profile is set to french interface and content language, the user that accesses that link will be automatically toggled to french.

### Optimized Tree Performance

The performance of hierarchical trees have been improved to allow users with sets that contain a lot of data to be able to see the tree when they first load it and start the navigation right away.

### Search Filtering Optimization

The search and matching of the filtering has been optimized.

**Performance Improvement**

The performance and speed of the web application has been improved upon inspection and rectification of certain calls.



# FIXED ISSUES

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## **Risk Edit Form**

Fixed an issue where the risk edit form would not save when users emptied the cause and effect values.

## **Wrong Alert Message When Downloading an Empty Set/Folder**

Fixed an issue where the wrong alert message was displayed when users wanted to download an empty set or folder in the “published only” display mode.

## **Bell Icon**

Fixed an issue where users received the new resource notification but the number on the bell icon did not increment.

## **Notification Filter**

Fixed an issue where the “Object Published” notification type filter in the notification center was not showing objects.

## **Printing Page**

Fixed an issue where the printing icon wasn’t disabled when users were in the printing page.

## **Identifier Filter**

Fixed an issue where the identifier filter in the List page was unstable when users filtered, navigated to the object’s Details page, returned to the top level of the hierarchical tree, and then filtered again.

## **Redirect Issues**

1. Fixed an issue where clicking on an Objective or Org Unit on the List page did not redirect to the Details page.
2. Fixed an issue where users were redirected to the Details page instead of the List page when clicking on a folder.

## **Excel File Process Import**

Fixed an issue where users would encounter problems when importing processes from an Excel file if they chose a process to be parent.

## **Analysis Report Data**

Fixed an issue where users who generated an analysis report in the graph view had the wrong data.

## **Tree selector**

Fixed an issue where the right-click menu did not appear only when users clicked **on** the set name.


## **UI**

Fixed an issue where the space between the Hierarchy Tree and List View would disappear when mass editing responsibilities with the filter set to “No hierarchy filter”.

### **SOP Generation**

Fixed an issue where generated SOP documents displayed the process map from left to right even if the user selected top to bottom orientation in settings.

### **Hierarchy Tree**

1. Fixed an issue where hierarchical tree content would appear outside of the tree when clicking the Quick Graph View icon (  ) from the Details page or Elastic Search.
2. Fixed an issue where document folders were not highlighted in the hierarchical tree when clicking on them from the List page with the filter set to “No hierarchical filter”.
3. Fixed an issue where users could not download sets and folders from the right click option in the tree.

### **List Tab Filters**

Fixed an issue where the List page would take too long to load objects when applying the “Current Level and Below” hierarchy filter or when filtering for published objects in the “Status” column.

### **Bulk Options in List Page**

1. Fixed an issue where the bulk edit options in the List page were not greyed out when the user did not have permissions to perform them.
2. Fixed an issue where users could not perform bulk options (like delete) in the List page when there was too much data in it.

### **Empty Glossary Module Loading**

Fixed an issue where the Glossary module appeared to load even though it contained no data and the UI was broken when switching to another module.

### **Suggested Approvers/Endorsers**

Fixed an issue where the loading time of the “Suggested Approvers/Endorsers” section when configuring an approval/endorsement cycle was too long.

# EPC MOBILE APP

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## FIXED ISSUE

### List Tab in Offline Mode

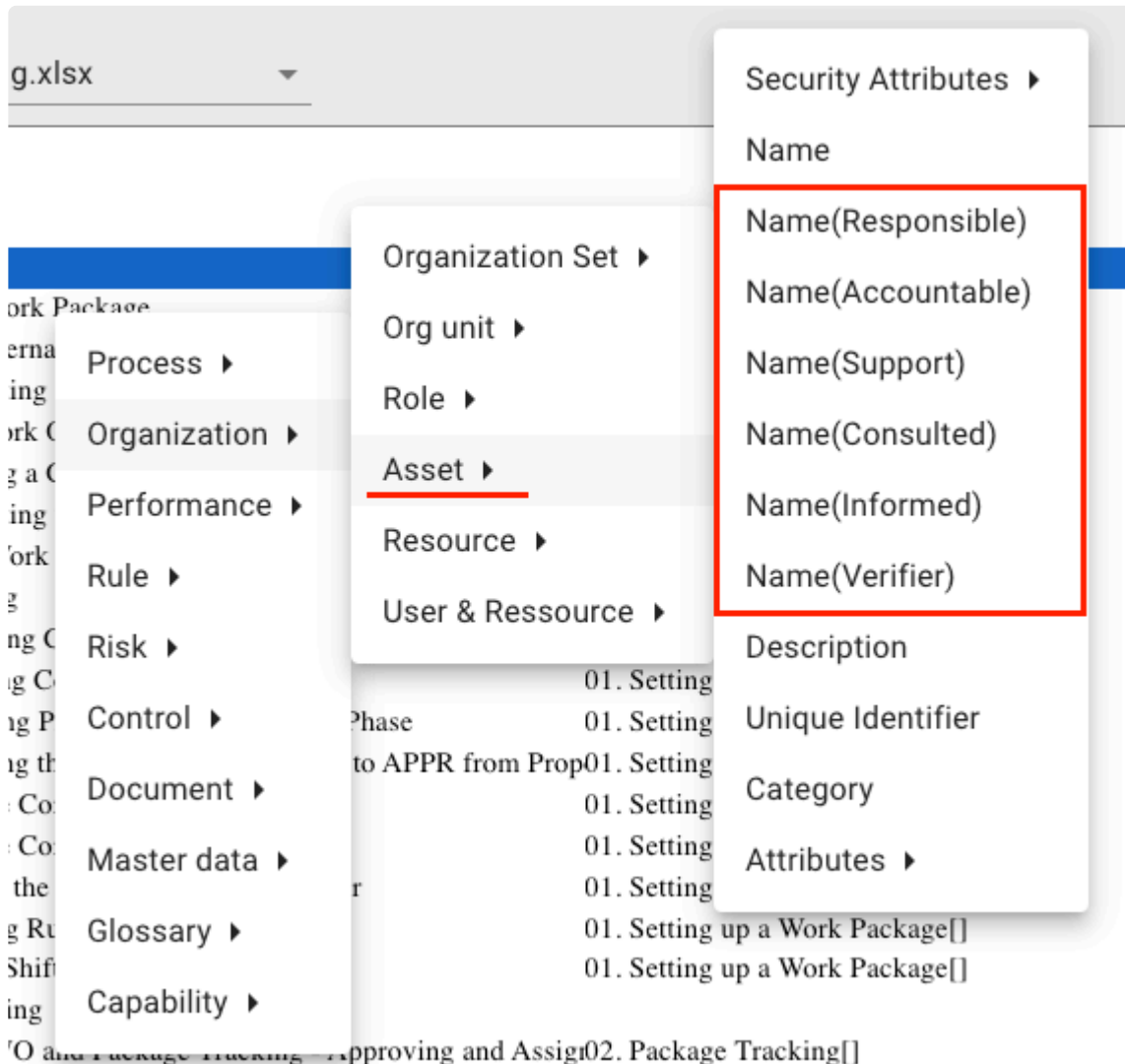
Fixed an issue where, in the list tab, the object type was displayed before the item name in offline mode, creating extra space.

# PROCESS-MINING PARSER

## WHAT'S NEW IN PARSER

### Assign Any RASCI-VS Value to Assets and Org Units

Mass uploading or updating all of RASCI-VS' values at once is now extended to assets and org units.



## FEATURE IMPROVEMENTS

Parser will now use name matching when updating EPC objects when the identifier is not available in the uploaded document.